



ELECTRONIC RECORDKEEPING

AKA Digitizing in the Cloud Era

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OPCUG / PATACS



Today's Agenda

- ◆ Credentials
- ◆ Paper or Plastic?
- ◆ Your Options
- ◆ What's Involved?
- ◆ Anti-Cloud Rant
- ◆ Plan
- ◆ Caveat Emptor

David L. Haase

- ◆ 1982 – 1st Computer: 286, 5¼" floppies
- ◆ 1995 – 1st Online column: Plugged-in Politics
- ◆ 1999 – Present: 'Internet' Consultant
- ◆ Executive, Integrated Web Strategy (IWS)
- ◆ Project Phoenix: I save digital copies

Today



What's in There

- ◆ Vehicle #1
- ◆ Vehicle #2
- ◆ [Address] Home
 - Archive
 - 1st Mortgage
 - 2nd Mortgage
 - Property Taxes
 - Homeowner's Insurance
 - Settlement Documents
- ◆ Archive
- ◆ Financial
 - Archive
 - Bank Statements
 - Broker Statements
 - Credit Cards
 - Credit Reports
- ◆ Legal
- ◆ Medical
- ◆ Personal
- ◆ Rebates
- ◆ Taxes (year-based)

The Issues: Which ... ?

- ❖ Holds more?
- ❖ Is safer?
- ❖ Easier to use?
- ❖ Gives more control?
- ❖ Costs less?



The Key to Your Decisions



*Comfort
Foods*

*Sick or sad,
these make you feel better*

Why Digitize?

◆ Paper copies

- Bulky, heavy
- Easily damaged, destroyed or lost
- Costly to keep
- Easily copied or stolen
- Hard to organize
- Hard to search
- Old-fashioned – So 1898*



Digital: Better Because ...

- ◆ Takes almost no physical storage space
 - Thousands of pages on a DVD or thumb drive
- ◆ Can be password protected
- ◆ Inexpensive so multiple copies stored multiple locations make it more secure
- ◆ Digital is the norm in the business world
- ◆ Easy to organize
- ◆ Completely searchable
- ◆ Anyone can do it

There Be Dragons ...



This is new territory for everyone ... at some point!



There is
nothing to
fear ...

We have simple
steps for you to
take.

PC vs. Mac



Does
not
matter

How Does It Work?

◆ In theory, very simple

- **Capture** the document
- **Preserve** the document
- **Organize** your documents

◆ In practice, very tedious

- Scan or download ... over and over
- Save ... over and over
- Shuffle ... over and over

Best Way to Get Digital Records

 Sign up!



Frontier Online Bill Pay
The green way to pay

Log in to:

- Pay your bill
- View current and past bills
- Go Paperless!

Username:

Password:

LOG IN

[Forgot Your Username or Password?](#)
[Live Chat is currently unavailable.](#)

Not Registered? [Enroll Now](#)

Fine Print:
You still have to
Save and organize.

2nd Best Way to Digitize - Scan



Scanner – King of Doc Savers

- ◆ Feed, flatbed, auto-feed or all-in-one
- ◆ Cheap
- ◆ Saves to multiple digital formats (PDF, JPEG, PNG, etc.)
- ◆ Produces excellent images
- ◆ Can name individual or multiple-document scans easily

Scanner Types & Costs

- ◆ Kodak P460 Feed - \$49.95
- ◆ Canon CanoScan 4507B002 flatbed - \$53.70
- ◆ Canon PIXMA MX512 auto-feed all-in-one - \$108.00



Saving Your Work: File Formats

- ◆ Scanners do them all:
 - ◆ TIFF
 - ◆ PNG
 - ◆ JPG or JPEG
 - ◆ GIF
- ◆ PDF – Just use this one.

P-D-What?

- ◆ Portable Document Format
- ◆ What you create is what you get
- ◆ Open source – Anyone can use
- ◆ Searchable
- ◆ Can be locked
- ◆ Good for Word / Excel docs



<http://en.wikipedia.org/wiki/Pdf>

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Storage Devices ... Physical



Hard drives

WD My Passport 1 TB
- \$98.70



WD My Book 3 TB - \$149.99

What's in a Gigabyte?

A lot.

| DOCUMENT TYPE | AVERAGE PAGES/DOC | AVERAGE PAGES/GIG |
|------------------------------|-------------------|-------------------|
| Microsoft® Word® Files | 9 | 64,782 |
| Email Files | 1.5 | 100,099 |
| Microsoft® Excel® Files | 50 | 165,791 |
| Lotus® 1-2-3 Files | 55 | 297,317 |
| Microsoft® PowerPoint® Files | 14 | 17,552 |
| Text Files | 20 | 677,963 |
| Image Files | 1.4 | 15,477 |



1 TB = 1,000 gigabytes = 1,000,000 megabytes

Physical Storage: Buy ...

- ◆ What you use
- ◆ What stores the most, not cheapest
- ◆ More than one
- ◆ Online or discount, not office supply
- ◆ What you will use

Case Against DVDs

- ◆ Relatively expensive
- ◆ Easy to damage
- ◆ Slow to copy
- ◆ Most are one-time use, not rewritable
- ◆ Create their own storage problem
- ◆ Almost as bad as paper



I Prefer ...

- ◆ Combination of thumb drives & portable hard drives
 - Thumb drives = easy to use, carry, secure
 - Portable hard drives = easy to store, hard to lose
- ◆ Pretty inexpensive
- ◆ Easy to use
- ◆ I control start to finish

The Cloud: Outsourcing Your Computer



We All Use the Cloud **NOW**

- ◆ Email (Gmail, Yahoo, AOL, Verizon.net)
- ◆ E-commerce (Amazon, eBay, BN.com)
- ◆ Social media (Facebook, Twitter, YouTube)
- ◆ Online banking (Your bank, Quicken)
- ◆ Online credit card use

Cloud Characteristics

- ◆ Located “on the Internet”
- ◆ No physical presence
- ◆ Connect via multiple devices
 - Desktops / laptops
 - Tablets (iPad)
 - Smartphones
- ◆ Using someone else’s hardware & software
- ◆ **You do not control anything!**

How Safe is the Cloud?

Somewhere between ...

Not
very



Not
perfect

Cloud Fears



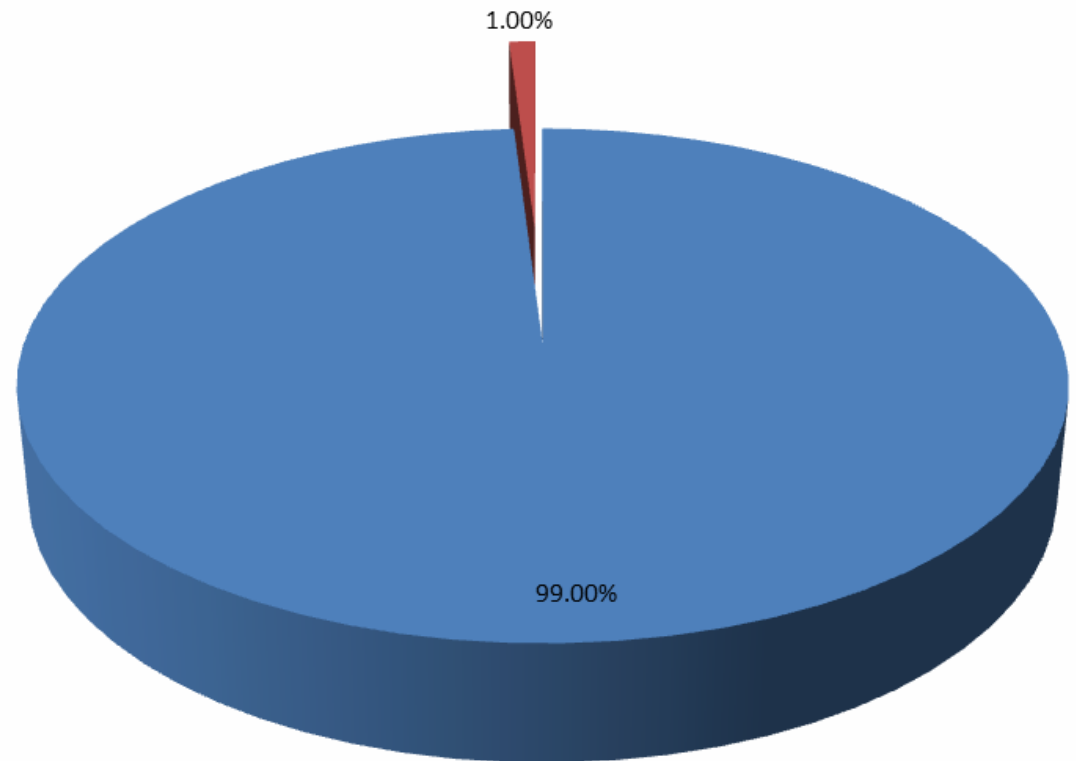
- ◆ Privacy – It's not private.
- ◆ Data loss – Possible, but not (very) likely.
- ◆ Timely access to data – Biggest issue.

Guaranteed Not to Fail

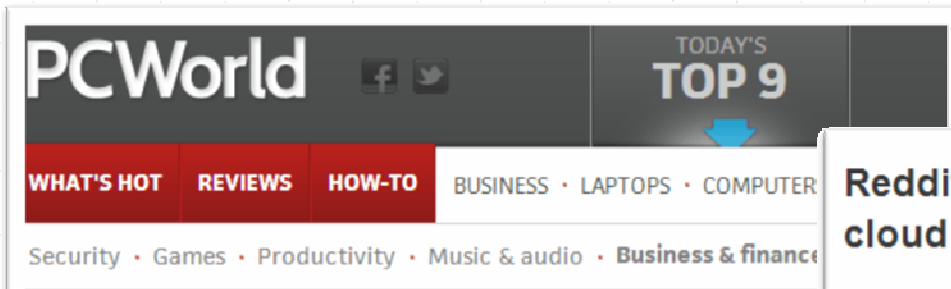


What's Your Tolerance?

- ◆ 1 year = 8,760 hours
- ◆ 99% of 1 year = 8,672 hours
- ◆ 1% downtime = 88 hours
- ◆ 0.1% downtime = **8.76 hours**



The Cloud Fails ... Regularly



PCWorld Facebook Twitter Today's TOP 9

WHAT'S HOT | REVIEWS | HOW-TO | BUSINESS | LAPTOPS | COMPUTER

Security | Games | Productivity | Music & audio | Business & finance

Reddit, Netflix, Flipboard taken down in Amazon cloud failure [UPDATES]

BUSINESS & FINANCE SOFTWARE
Cloud Failures Cost More Than \$70 Million Since 2007, Researchers Estimate

Cloud failure and the myth of the decentralized Web



Not every cloud has a silver lining...

[News for WSJ: AMAZON'S SNAFU](#)



Amazon's Snafu Rattles Customers ✓
Wall Street Journal - 18 hours ago
Amazon.com's latest technical glitch—interrupting service others—is causing some companies to rethink their reliance on the cloud.

Even a Cloud Failure Tracker

OUTAGE ANALYZER - Mapping Internet Outages in Realtime

Currently Viewing: All Ongoing Internet Service Outages

Follow our Alert Feeds to get notified when outages happen

Help Sign In

Set Up Custom Alerts

No outage selected, currently displaying all open outages on map.

LEGEND

- Hosting Location
- Affected Regions
- Unaffected Regions

Affected Regions

Show Recent Search Results

Recent Outages

Use the slider below to set the minimum level of impact for your results

Impact: Low High

Outage list updated

Outage: 1/9/2013 14:59:24 EST
Host 67.198.45 of Level 3 in Milwaukee
152 Potentially Impacted Domains
Link Outage Size: OPEN

Outage: 1/9/2013 14:58:35 EST
Service asin.amazon.de
51 Potentially Impacted Domains
Link Outage Size: OPEN

Outage: 1/9/2013 14:21:00 EST
Deployed service
http://platform.twitter.com on host
50 Potentially Impacted Domains
Link Outage Size: OPEN

Outage: 1/9/2013 13:59:18 EST

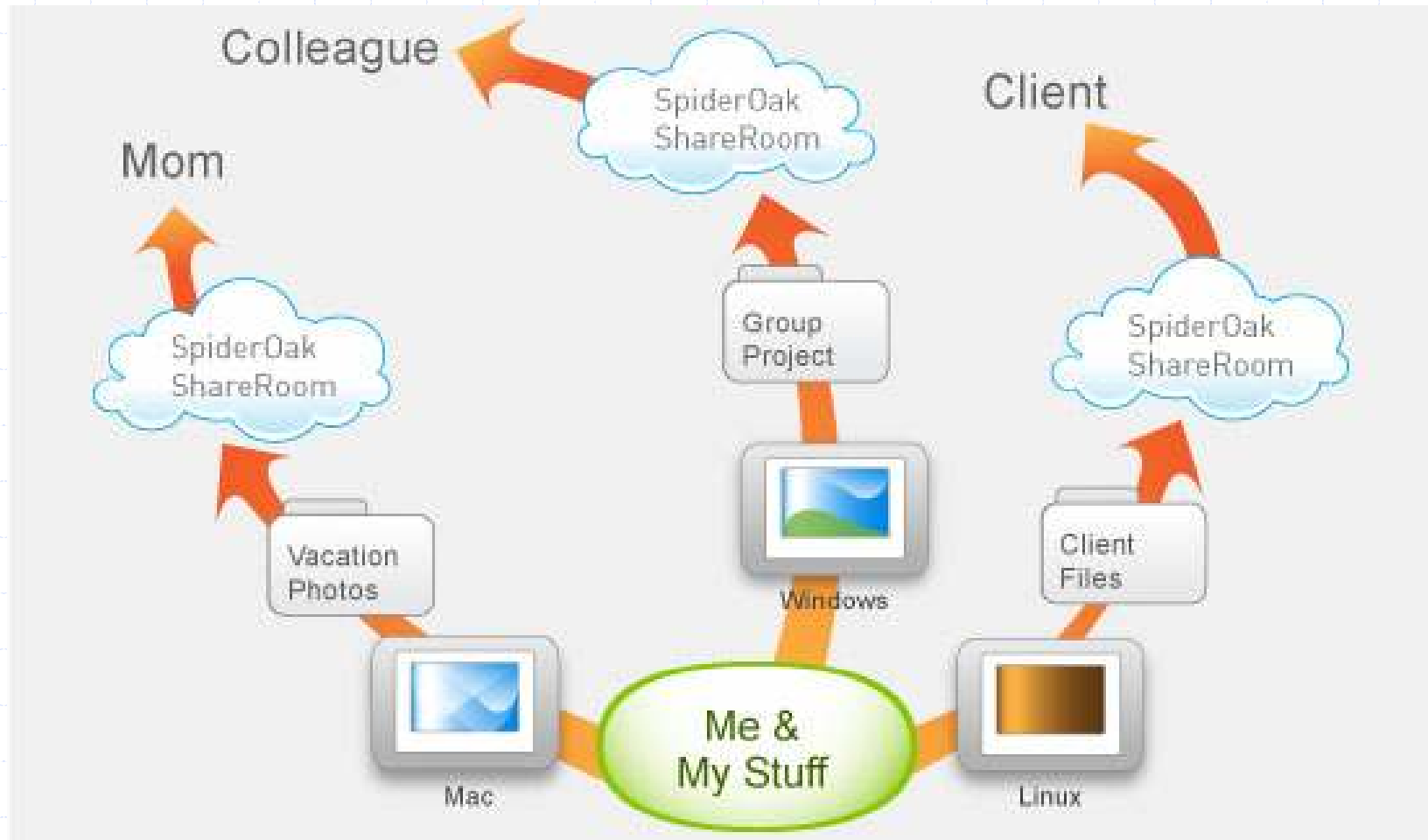
24 outages listed
From: 2013-01-08 18:35:33 to 2013-01-09 14:59:24

Implementation: OutageMap

Into the Cloud



How Cloud Works (SpikerOak)



What You Get in the Cloud

- ◆ 2-5 gigabytes of free memory
- ◆ Buy more memory cheaply
- ◆ Use regardless of PC/Mac
- ◆ Use anywhere, not tied to a computer
- ◆ Automatic sync with multiple computers
- ◆ Share with others
- ◆ **You do NOT own your files in the cloud!**

You Should Know

- ◆ **You do NOT own your files in the cloud!**
- ◆ Other human beings DO have access to your files.
- ◆ Do NOT put passwords or health records on the cloud.
- ◆ Identity theft is possible ...
just like at restaurants, ATMs, retailers.

Carbonite (Example)



CARBONITE Because your life is on your computer

Now For Mac

Online Backup

- **Automatic** – backs up files as you work
- **Secure** – same encryption as banks
- **Reliable** – easy, hassle-free file recovery
- **Unlimited** – only \$54.95 per year

The Boston Globe

“Carbonite is just about flawless. Just install it, launch it, and forget about it.”

The advertisement features a screenshot of the Carbonite web interface on the left, showing a dashboard with various settings and backup status indicators. The central text highlights the product name and its key features. On the right, a quote from The Boston Globe is presented in a stylized, newspaper-like font.

- In the Cloud – off-site
- \$59 per year
- Unlimited storage
- All file formats
- Continuous backups
- Set up and forget

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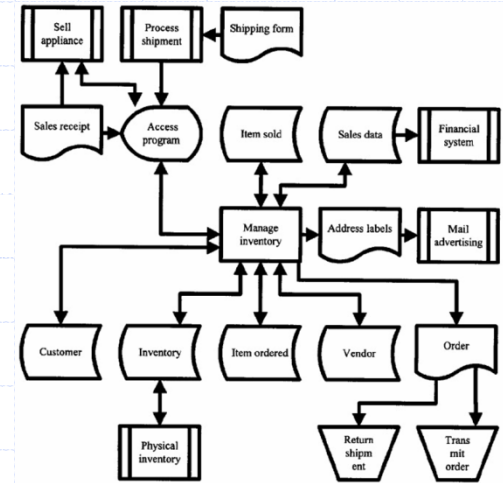
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A Lifestyle, NOT a Diet



Organize with a PLAN

- ◆ Have a plan
- ◆ Set up a file system
- ◆ 'Junk' file NOT allowed
- ◆ Use a consistent naming convention
- ◆ Make a date with digital
- ◆ Keep a paper index



Organizing Digital Files

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 - 2nd Mortgage
 - Property Taxes
 - Homeowner's Insurance
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- ◆ Archive
- ◆ Financial
 - Archive
 - Bank Statements
 - Broker Statements
 - Credit Cards
 - Credit Reports
- ◆ Legal
- ◆ Medical
- ◆ Personal
- ◆ Rebates
- ◆ Taxes (year-based)

Passwords

- ◆ Lousy – Too familiar
 - Spouse, kid's or pet's names
- ◆ Horrible – Too obvious
 - password
- ◆ Disastrous – Too dumb
 - 123456
- ◆ Smart – Write it down
 - p@55w0rD\$



You Are Not Alone



Help box ... Search engines ... Slideshare.com

Parting Thoughts



- ◆ Save multiples
- ◆ Store multiple places
- ◆ Label everything

“The handyman's secret weapon - duct tape.” – Red Green

Thank you

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Blog – Media: By the Numbers

mediabythenumbers.wordpress.com/