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File Management



File Management

The following course is an overview of file management... whether you're struggling with photos, not sure where to find the attachment you just downloaded, or endlessly searching for documents, file management is more than likely the culprit. Understanding how to create a file/folder structure that works for you and allows you to find the file you need when you need it, will make your computer experience much less frustrating and much more productive... We'll look at building a logical file structure and focus on the skills necessary to master Windows Explorer, the Windows File Management tool.

During this course we will look at:

- Organizational Structure
- Windows Explorer
- Navigation
- A View Changes Everything
- Creating Your Organizational Structure
- Folder Creation
- Saving Files
- Moving Files and Folders
- Multitasking
- Managing Folders
- Attaching and Downloading
- Deleting Files and Folders
- Restoring Deleted Items
- Backing Up Your Files
- Tips from Microsoft
- Practice Exercises
- Wrapping Up



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Introduction

Your computer provides a hard disk for storing documents, files, images, videos, photos, etc. Keeping track of all those files can be frustrating. This class is intended to expel the mystery of file storage and help you organize and locate your files more easily.

Storing files in a computer requires a logical approach similar to the way you organize files in a paper filing cabinet. The concepts are all the same... with the addition of some very helpful, automated tools for managing and searching that we don't have with a paper filing system.

Organizational Structure

Before we explore the way Microsoft organizes files on your computer, it's important we first understand organizational structure.

Rule Number 1 – store your document *in a place* and *with a name* that will allow you to find it the first time you look for it!! There's nothing more frustrating than hunting for a file you can't find.

If you have to look in several locations or don't recognize the document when you read its name the first time, there's a good chance you didn't file it logically (according to YOUR logic) or give it a detailed enough name. Not to worry... with Windows you can always move it or rename it whenever you want.

So, what makes a sound organizational structure?

First and foremost, use file names that will provide recognition when you look back in a day, a week, a month, or a year. And, as previously mentioned, if you don't find a file when you're looking for it, consider moving it or renaming it to make it easier to locate the next time.

Secondly, you need a logical structure for your filing system... Logical is a very subjective term, because what's logical to you, may not be logical to me. But, it's your system, so the logic needs to work for you!!

The following rules will also assist:

1. Adopt consistent methods for file and folder naming
2. Keep file names short where possible, but ensure sufficient detail to identify the file



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3. Consider creating separate folders by category (e.g. year or quarter) to avoid overlapping and long file names
4. Avoid creating separate folders with similar names (e.g. Images and Photos)
5. Avoid large folder structures

Now, start at the highest level and work your way down. If you are filing documents about your taxes or your investments, you might want to organize them each a little differently. Think about how you would find the documents and then create a structure that works, based on the type of documents you're filing.

Taxes

- > 2010
 - > NY State
 - > Fed
- > 2011
 - > NY State
 - > Fed

Investments

- > Stock
 - > Schwab
 - > Amazon
 - > Fidelity
- > Banking
 - > Savings
 - > Checking
 - > CDs

You also need to consider which drawer or cabinet you're going to store your documents in and whether you'll assign each drawer a certain function or organize alphabetically. Alphabetical systems work well in situations where you will remember the first letter of the name, but if you might not be able to remember the name (Automobile vs. Car), you'll still have trouble finding documents stored this way. So, again, the first rule – use a name you will remember (but not be confused by) and store in a location you will find the first time!





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Windows Explorer

Now that we have reviewed the basics of organizational structure, let's look at how your computer stores information. Microsoft's Operating System is called Windows, and it is through a "Window" that we see into the contents of a filing cabinet, a folder, a file, or a program using Windows Explorer, the Microsoft Windows File Management tool.

As with any program, you can find Windows Explorer in many ways - in the Taskbar, on the Desktop, in the Program list under the Start Menu. The easiest way to access Windows Explorer is through the Taskbar. The

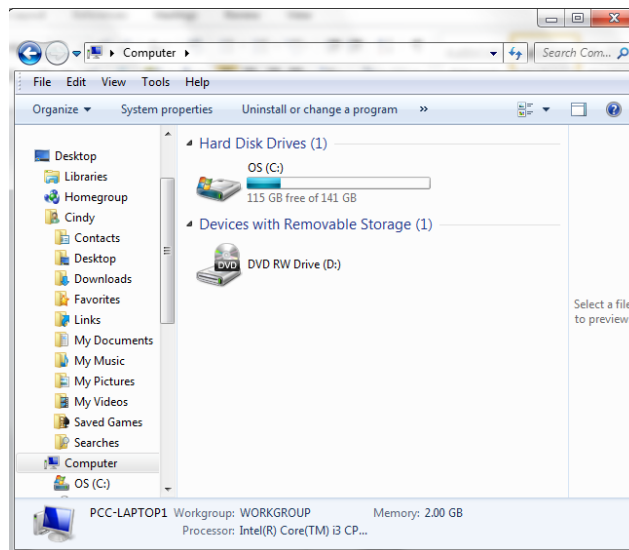
Windows Explorer Icon looks like this . The Computer icon  on your desktop or in your Start menu list will also take you to Windows Explorer. In earlier versions of Windows (e.g., XP or Vista) it will be called "My Computer".

Navigation

Navigating your computer's hard drive and finding content can be accomplished in different ways. The Desktop and Start Menu hold the most popular and commonly-used items, but in some cases, it is necessary to find content stored on the computer with Windows Explorer. When you open the Computer Icon on the Desktop, or any "Folder", Windows Explorer is automatically opened.



Folder: A virtual container that imitates a real-life folder. It is not an actual program, and opening it will only open a Windows Explorer window showing the contents of the



Folder. Folders can be created to organize documents or favorite programs. When opening the Computer Icon, you will first see Icons for the Hard Disk drive



, and possibly additional drives (a CD/DVD Drive




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, a removable memory drive (or Flash Drive). Double-Clicking any of these drives will open their contents. In the case of the hard disk drive, this would be several Folders. Any of those Folders can be opened to explore their contents, which may consist of additional Folders and/or programs or documents. There is no limit to the number of "Sub-Folders", documents, or programs, stored within a Folder. Nesting too many sub-folders can cause confusions and difficulty finding your files, so as with all filing systems build your sub-folders carefully.

Sub-Folder: Any Folder that is located within another Folder.

After opening a sub-Folder, you can return to the previous Folder by Clicking the Back Button  in Windows Explorer's upper left corner. Additionally, you can see the current location by looking at the "Breadcrumb Trail" at the center top in the Windows Explorer "Address Bar". This trail shows you which folder you are currently in and most importantly which folder you would be saving a document to, if in fact you were trying to save something. Always check the Breadcrumb Trail and make sure you know where you are before proceeding.



Address Bar: A location at the top of Window's Explorer that displays the location (or address) of information, also known as a Breadcrumb Trail.

Breadcrumb Trail: A listing of the current location which shows every Folder and Sub-Folder Clicked through. For example: This Breadcrumb Trail depicts that the user is navigating through the "Computer" Folder and currently looking at the "OS (C:) Hard Drive" Folder within it.

Any of the items in the Breadcrumb Trail can be Clicked to return to that Folder.

A View Changes Everything

You control how information is displayed in Windows Explorer by changing the "View". To adjust the View, Click on the down arrow (which looks more like a down triangle) of the Change View Icon in the upper right corner.

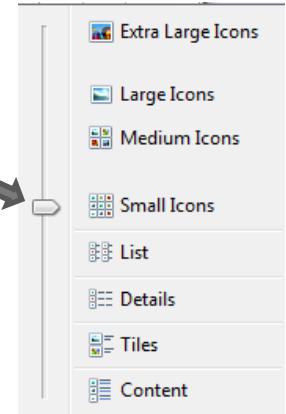




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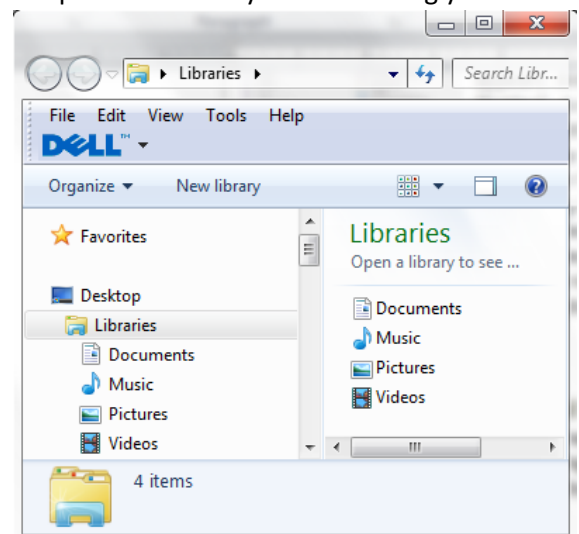
This Window will appear. As you can see, there are numerous views to choose from. Try each view by sliding the tab up and down (as indicated by the arrow). You'll see each will produce quite different Views of the content of your computer. As with many Windows features, it's up to you to choose which View is best for you. You may prefer different Views based on what you are trying to accomplish at a particular point in time or what you are trying to find out about a certain file. Sometimes more detail is required, while other times a visual representation, known as a "Thumbnail", produces just the insight needed to find the image you're looking for.



Creating Your Organizational Structure

Now that you have the basics of file management, let's create a file structure unique to your computer. The easiest place to start if you are creating your first file system is by using the default structure provided by Microsoft. Depending on the version of Windows these will be named differently. For Windows 7, the top layer of the structure is called "Libraries" of which there are four called Documents, Music, Pictures, and Videos. Within each Library, two default sub-folders exist as follows:

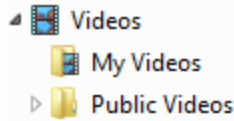
- ▲ Documents
 - ▷ My Documents
 - ▷ Public Documents
- ▲ Music
 - ▷ My Music
 - ▷ Public Music
- ▲ Pictures
 - ▷ My Pictures
 - ▷ Public Pictures





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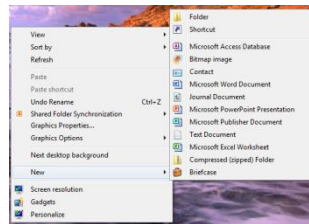
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Within "My Documents" you will create the sub-folders specific to your content. And the same for My Pictures, My Videos, and My Music, if you plan to use those Libraries.

Folder Creation

For ease of organization, you can create a Folder or Sub-Folder in any location. To create a Folder, Right-Click any blank part of the Window (You will not be



able to create a Folder if you Right-Click on an Icon or file), and then Click "New" on the small menu that appears. Another menu will appear. Click "Folder". A new Folder will appear with the default name "New Folder". You'll notice "New folder" is highlighted. To rename the Folder simply start typing. If the highlighting has

disappeared, you can Right-Click the Folder, and select "Rename" from the menu that pops up. Then type a new name for the Folder and push the keyboard's "Enter" key. Double-Clicking the new Folder Icon will open the Folder in Windows Explorer. By Right-Clicking on your Desktop, the same steps can be followed to create Sub-Folders.

Saving Files

Many Windows programs give you the ability to create and save files for later editing or review.



To save Click "File" in the upper left corner of the Window. A menu will appear offering options. Two of them will be: "Save" and "Save As". Clicking "Save As" allows you to name the file and choose the location it will be saved to. As you'll see, a Windows Explorer window will appear and you will be

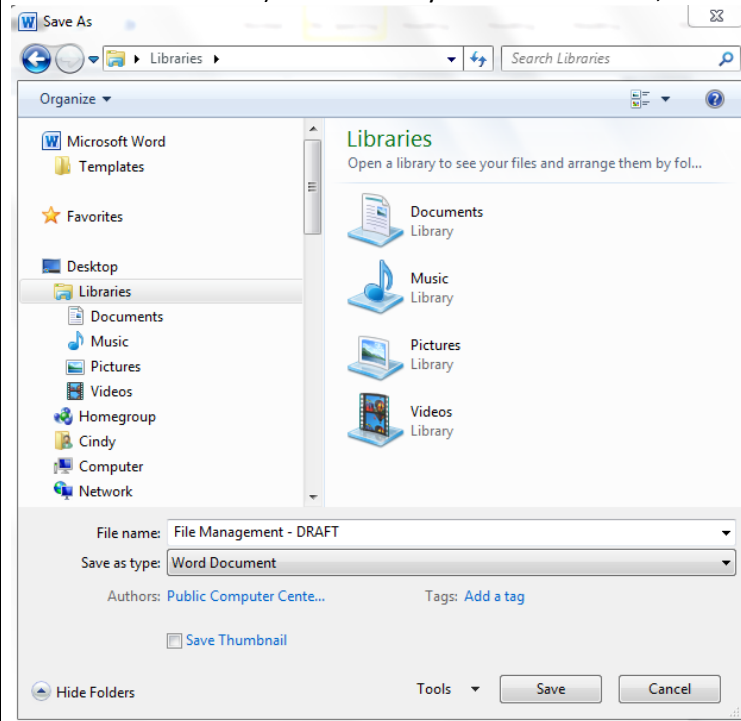
able to Navigate to the appropriate folder and sub-folder, name your file, and save it wherever you choose. This is also where you are given the option to choose the Type of file you want to Save As. For example, if you needed to send a Word document to someone who had an older version of Word, you would Click the down arrow (down triangle) to the far right of the box labeled "Save as Type" and choose "Word 97-2003 document". If alternatively you wanted to send a copy of a document that could not be easily edited, you



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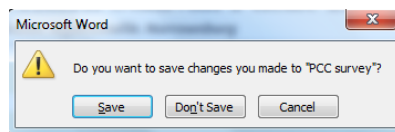
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would choose “PDF” which stands for Portable Document Format. This allows anyone to open the document (using a PDF reader which can be easily downloaded for free) whether they have Word or not, but they can’t edit.



Clicking “Save” will do the same thing if the file has never been saved before, but if it has already been saved, this will simply update the existing file with any recent changes in its current location.

If you attempt to close a program with unsaved work, a message will appear with options to “Save”, “Don’t Save”, or “Cancel”. Clicking “Cancel” will undo your request to close the program and keep it open. Clicking “Don’t Save” will close the program without saving. Any work that was done will be lost. Clicking “Save” will open a version of Windows Explorer that allows for you to choose the location where the file will be saved, and what the file’s name will be.



To avoid any loss of information, it is advisable to save often. The keyboard Shortcut for Save is [Ctrl + S]. If you’re not sure where the file has been saved, be sure to select “Save As” first! Then, look at the Breadcrumb Trail to determine where the file is currently saved.

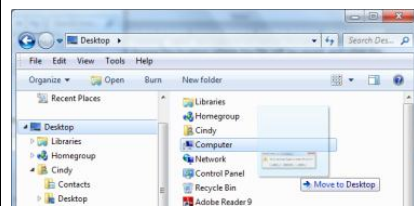


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If you would like to create a file by starting with an already existing file, open the existing file and create a new identical file by using the "Save As" command. You can now name the new file something different and make changes without affecting the original file.

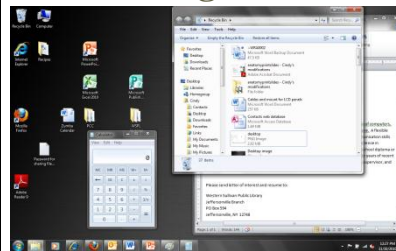
Moving Files and Folders



Any item on the computer can be easily moved to another location. For example, if a user created a receipt and saved it to their Desktop and later decided to create a Folder to store receipts, they would be able to move the receipt from the Desktop and into the Folder. The easiest way to do this is simply to Click the Desktop item, and while holding down the button, drag the item until it is on top of the Folder it is to be moved into. When it has been positioned correctly, the Folder will be highlighted, and a small text will appear saying "Move to [Name of Folder]". When the Folder is highlighted, the Mouse Button can be released, and the item will be moved into the Folder. This is called "Drag and Drop".

Another method of moving files (one which must be used if the file to be moved and the Folder to be moved to are not both on the Desktop) is to open Windows Explorer (by Double-Clicking "Computer" on the Desktop or any Folder), and locate the Folder or Sub-Folder the file will be moved to. The file can either be dragged into the Folder, or if the Folder is open, dragged into any blank part of the Folder's Windows Explorer window. If the file is not on the Desktop, open a second Windows Explorer Window and locate it there, then drag it from one Window to the other and into the appropriate place. This is called "Multitasking".

Multitasking



An important function of computers is their ability to run different programs simultaneously, known as Multitasking. If you open a program while another program is already running, a new Window will appear, but the original will remain visible. Clicking on either one will bring it to the front. You can also move between different open programs by Clicking their Taskbar Icon. There is no limit to how many programs can be running

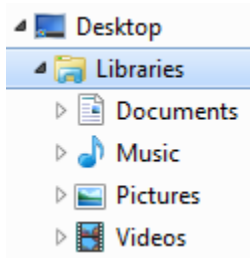


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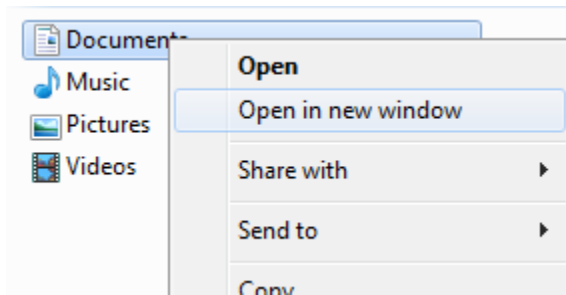
simultaneously, but several programs running over an extended period of time can result in slower computer performance.

Managing Folders



Many options exist for managing your folders. As you can see in this image, there are small arrows or triangles to the left of each icon. These ONLY appear when you hover over them. If the triangle is downward facing and black (or filled in), this indicates the folder is in its "Expanded" state. If the triangle is right-facing and clear, the folder is "Collapsed". Using these to manage your Folders is very helpful, because it allows you to see

more detail if and only if you choose.



You also have the option to "Open in a new window" when opening a folder. This allows you to open multiple Windows to manage the files when you need to see two folders simultaneously or if you want to drag and

drop between them.

Try these options to see how much easier it is to manage your files and have more confidence that you know where things are stored and most importantly... can find a file when you want it, the first time!

Attaching and Downloading

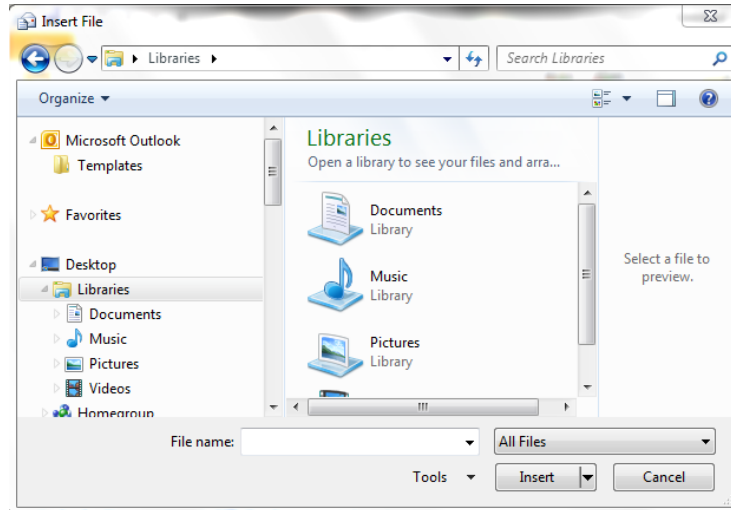
Now that you've mastered the art of file management, attaching files to an email, downloading files from an email, or downloading files from your camera should make a whole lot more sense. All of these functions require you to navigate to the file you want to attach, download, or move using Windows Explorer and then performing whichever function you are attempting.

With email the Windows Explorer window may look more like the one below, but as you can see, you have your cabinets or folders on the left pane with the contents of the cabinet or folder on the right. Now you just need to navigate to the file you want to attach and choose "Insert". With some email programs you may click "Open".

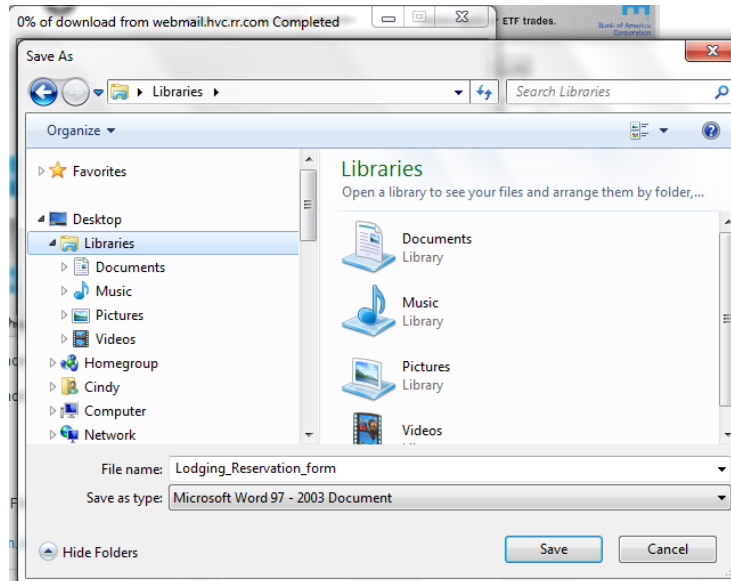


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If you are downloading (from email or your camera or another storage device) and you want to Save the file to your computer, you will see a window similar to this. Again, this is simply a Windows Explorer window and you will be required to navigate to the folder or location that you want to Save the file. In this case (as with any time you Save), you have the option of naming the file something other than what it was named when it was sent to you. Type the File name, navigate to the Folder you want to save it to, and click Save.





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Deleting Files and Folders

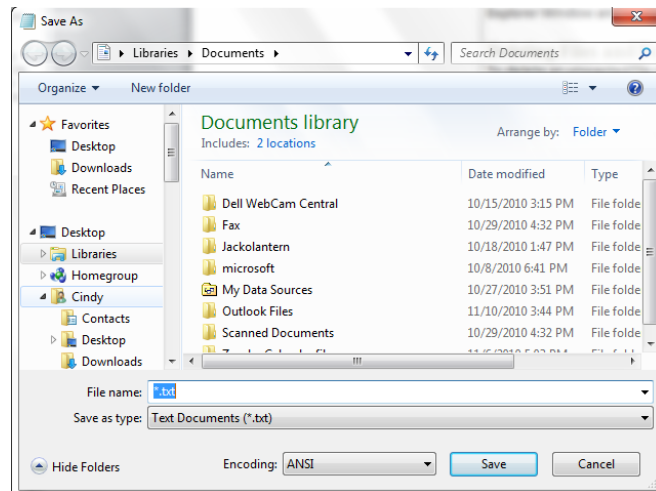
To delete an unwanted file or Folder, simply select the item (by Clicking it once) and press Delete. You can also just drag the file into your Recycle Bin. You'll

see a Recycle Bin icon  on your Desktop.

To avoid accidental deletion, a Window will appear confirming that you wish to delete the item. Selecting "No" will cancel the deletion request. Selecting "Yes" will delete the item. If the item is a Folder with programs or documents or Sub-Folders within it, all of these items will also be deleted.

Practice Saving, Moving, and Deleting Files and Folders:

- 1) Open Notepad.
- 2) Enter text.
- 3) Click File in the upper left corner of the Window and select Save.
- 4) A Window will appear.



- 5) Enter a name for your file in the text box next to "File Name".
- 6) Choose a location to save the file. For this exercise, the instructor will direct you where to save your file.
- 7) After saving the file, make sure to remember or write down where you saved it. Follow the Breadcrumb Trail in the Address Bar.
- 8) Next let's Move the file to another Folder. Click the Computer Icon on the Desktop or the Windows Explorer Icon in the Taskbar. We need to open two Windows Explorer Windows, so we can move a file between them. You can do this by Copying and Pasting or by Dragging and Dropping. Refer to the Moving Files section.



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- 9) Let's Delete the file. Don't worry, we'll see how to "Restore Deleted Items" in the next section.

Restoring Deleted Items



Deleted items are stored in the "Recycle Bin" on the Desktop. Opening the Recycle Bin will show all recently deleted items. Users can right Click on any item in the Recycle Bin, and a menu will appear with options to "Restore" or "Delete". Choosing "Restore" will move the item back to its original location. "Delete" will remove the item permanently, after which it will no longer be possible to find or restore the item. You can also Drag and Drop the file from the Recycle Bin to the Desktop or to a Folder for storage.

Backing Up Your Files

Windows 7 includes an easy method for Back Up. In the Control Panel under "System and Security" you'll see an option to "Back up your computer".



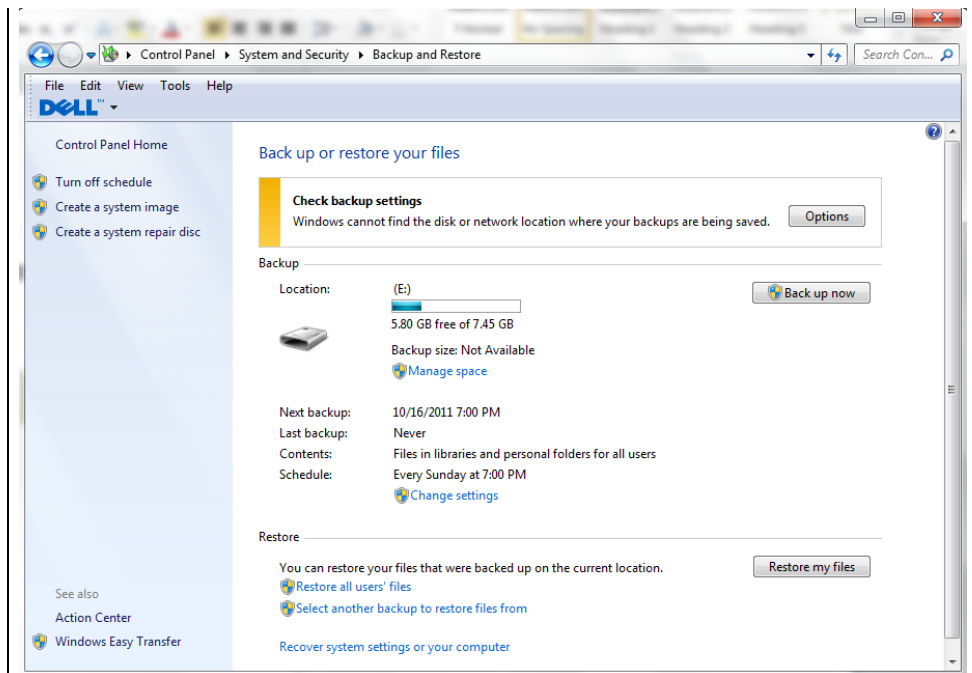
System and Security
[Review your computer's status](#)
[Back up your computer](#)
[Find and fix problems](#)

You'll need to have an external storage device connected to your computer to complete the Back Up. This can be an external hard drive, flash drive, or CD(s). Once you've connected the storage device, and Click "Back up your computer", Windows 7 will recognize the device and open this Window to step you through the process.



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Keep in mind that storing your files on an external device only provides a Back Up, if you also have them saved on your computer's hard drive (or another location). A Back Up means that it is at minimum, the second copy! For very important files, a third copy is recommended. Just remember, the more copies you have, the more difficult the process to manage the files. As you update one copy, the "other" copies will not include the updates until you rerun the Back Up.

Tips from Microsoft

Microsoft offers several tips on file management and includes tips from readers. They may not all fit within your logical classification system, but they are still useful. Check them out at <http://www.microsoft.com/atwork/productivity/files.aspx>.

Practice Exercises

File Management is one of the most important skills to master, if you want to make your time at the computer efficient and more enjoyable. To enable this we've created a few suggested exercises. Practicing these should make a huge difference and allow you to find what you need when you need it, reorganize files or photos, rename folders, create new folders, and just plain organize your



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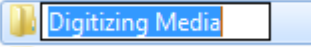
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life and your work much more effectively. You can refer to the course handout for more detailed instructions. Have fun and good luck!

Changing your view – Open Windows Explorer and click the “Change your view” or “More options” buttons toward the top right. Try each view and see which ones work best for you. You’ll probably find that “Icons” work well for images and photos, while a “List” or “Details” view may work better for documents.



Creating Folders – If you want to create a new folder, you can do this on your Desktop or inside a folder or library within Windows Explorer. Folders can be created by clicking the “New folder” button or by right clicking and choosing “New” and then “Folder”. Try both techniques. Remember when the folder is created and the words “New folder” are highlighted in blue, you can simply start typing which will replace those words with whatever you type. If you click by mistake and the blue highlighting disappears, just highlight the words “New folder” again and start typing.

Renaming Folders – To rename a folder, the folder in question must be highlighted in blue like this  which allows for editing. When you start typing, you will replace what is currently written. A couple options exist to accomplish this: 1) Right click on the folder and choose “Rename”, or 2) Click on the folder name (not the picture of the folder icon) once and then once again. Keep in mind that if you click too quickly the second time, you are actually “double clicking” and this will open the file.

Renaming Files – Files may be renamed in the same way as Folders.

Moving Files and Folders – There are several options for moving files and folders. We’ll look at a few of the most common. Open Windows Explorer and navigate to the file you would like to move. Make sure it appears in the right section of the Windows Explorer window. Now navigate to the folder you want to move it into on the left side. Don’t click on the folder. This will open the folder in the right hand pane. We just want to see the folder in the left pane. Now simply “Drag and Drop” the file into the folder. To do this, click on the file and hold it. Now drag the mouse over the folder and once you have it positioned on the correct folder, release the click. You should see a pop up window that says “Move to _____ folder”. You can now open the folder and see if your file moved there. You can also cut and paste files to other folders, if you aren’t completely comfortable dragging and dropping. Another method is to open two Windows Explorer windows and drag files or folders



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between. Try each of these, experimenting with files and folders that are not important. Once you get the hang of it, try it with your real files.

Wrapping Up

Hopefully this course has provided a good foundation for those looking to better understand Windows Explorer and build a file management system that works for you. The most important thing to remember is that creating an organizational structure that works for you will improve your time management skills and reduce frustration... This can be critical in today's fast paced world both at work and at home.