

Basic File Management and Organization

DEFINITIONS

Drive – The piece of hardware that holds and runs disks and stores files and folders including programs as well as documents. Your "hard disk" or "hard drive" is usually designated with the letter "C," while your floppy disk/drive is usually named "A." You also will probably have a CD/DVD drive. Drives can be internal as well as external. The most common use for external drives is for backup purposes or to move content from one computer to another.

File – One document, one image, one something. Files have names and are represented by various icons that indicate which program is used to open them. In the world of computing, the terms “folder” and “file” are entirely separate, distinct, and noninterchangeable. Folders contain files; files cannot contain folders.


Filename – The unique identifier for a file, including or not including its file extension. The filename can contain letters, numbers and symbols, including spaces. Some symbols are not allowed such as " * : < > ? \ / | .

File extension – The two or three or four letters after the dot in a filename. The file extension indicates what kind of file it is: its “format” or “type.” For instance, the file extension .exe refers to an "executable" file--in other words, an application. The file extension .html indicates a Hypertext Markup Language file--in other words, a web page. Some common file extensions:

- .doc or .docx – Microsoft Word document
- .wpd – WordPerfect Document
- .txt – Plain text document
- .htm, or .html – A plain text document with added code that enables it to be read on the World Wide Web
- .jpg – An image file
- .gif – An image file
- .exe – An executable file, meaning an application/program/piece of software

File Size – The size of a file measured in bytes. A floppy disk holds about 1.5 Mb; a Zip disk holds 100 Mb or 250 Mb; a CD holds about 800 Mb; a DVD holds about 4,700 Mb. Hard drives (C:) typically range from 80gb to 360gb in depending on the age of the computer.

- 1,000 bytes = 1 kilobyte (Kb)
- 1,000 kilobytes = 1 megabyte (Mb)
- 1,000 megabytes = 1 gigabyte (Gb)
- 1,000 gigabytes = 1 terabyte (Tb)

Folder – Also called a “directory.” A division of a drive into which you put files or further folders (which are then called subdirectories or subfolders). In both Windows and Mac, a folder or subfolder is represented by an icon that looks like a manila folder: 

Path – The exact location of a file, including drive letter, directory, subdirectory, and filename, as in the following: C:\My Documents\Training Materials\Basic File Management.doc .

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VIEWING FILES/FOLDERS IN WINDOWS

There are three ways of managing files in Windows operating systems:

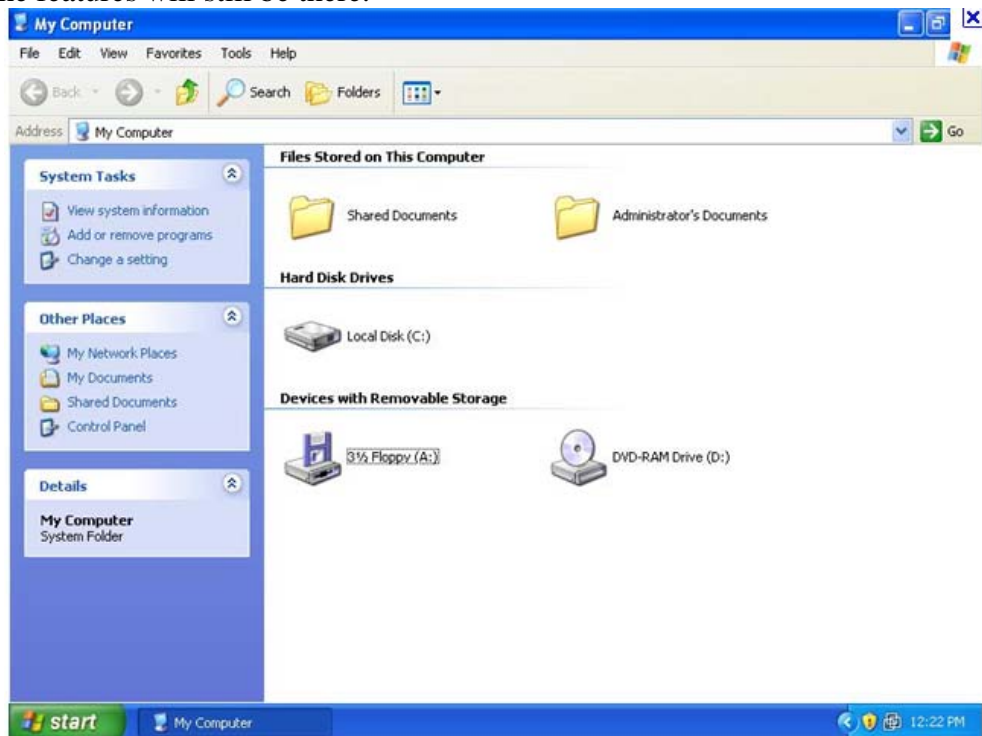
- By using My Computer or My Documents
- By using Windows Explorer.
- From within a program

Using My Computer

Double-clicking on the My Computer icon, which should be located in the upper left-hand corner of your desktop, will open a window labeled My Computer. From within this window, you can navigate to many other locations within your disk drives.

Doubleclicking on any icon will open that location and allow you to see the contents, such as folders and files that are stored there.


Your “My Computer” might look different if you are using a different version of Windows but many of the features will still be there.



- A:\ is your floppy disk drive
- C:\ is your hard disk
- D:\ is your Zip, CD, or DVD drive

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Notice the Quick Links for **System Tasks** and **Other Places** on the left hand side. The contents of this panel change depending on the contents of what is being displayed.

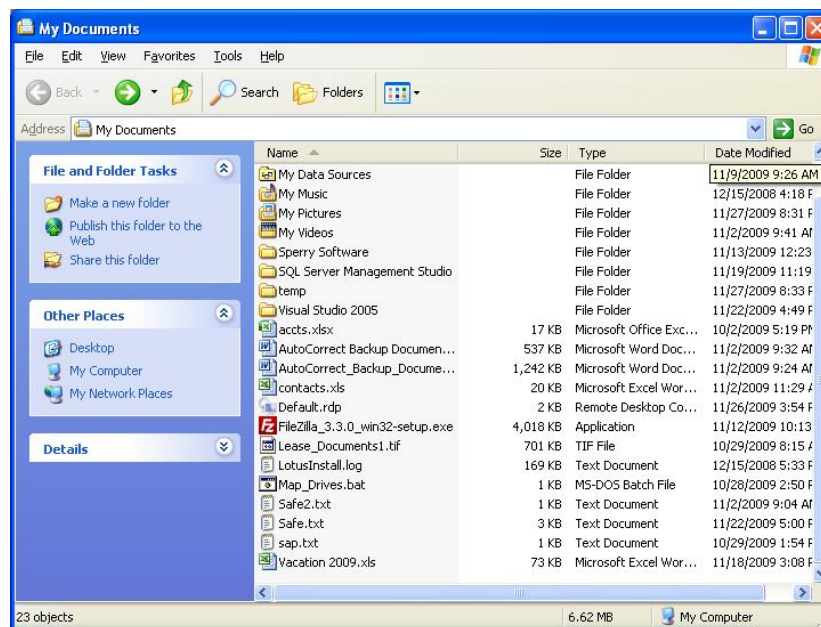
You can change the way files and folders are displayed within the window. Use the View menu or the Display Options button  on the toolbar. There are four ways to view files and folders in Windows XP. Windows 7 offers additional view options.

- Large icons
- Small icons
- List – Choose this when you want to work with several files or folders at a time.
- Details – This is a good mode to work in when you want to see when the file was created, its size, and other important information.


Using My Documents

My Documents is the default storage location for all your files and folders. You can open My Documents is several ways.

- Double-click the My Documents icon on your desktop.
- Click on My Documents on the left panel in My Computer (or any other window).
- Use drop-down location lists to select My Documents.



Double-clicking on any folder icon will open that location and allow you to see the contents, such as folders and files that are stored there. Click the **Back button** to return to the previous view.

Notice the Tasks and Other Places panel on the left. And you can change the display using the View menu or the View button  on the toolbar.

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Right-clicking on a selected file or folder will allow you to do several useful things, among which are the following:

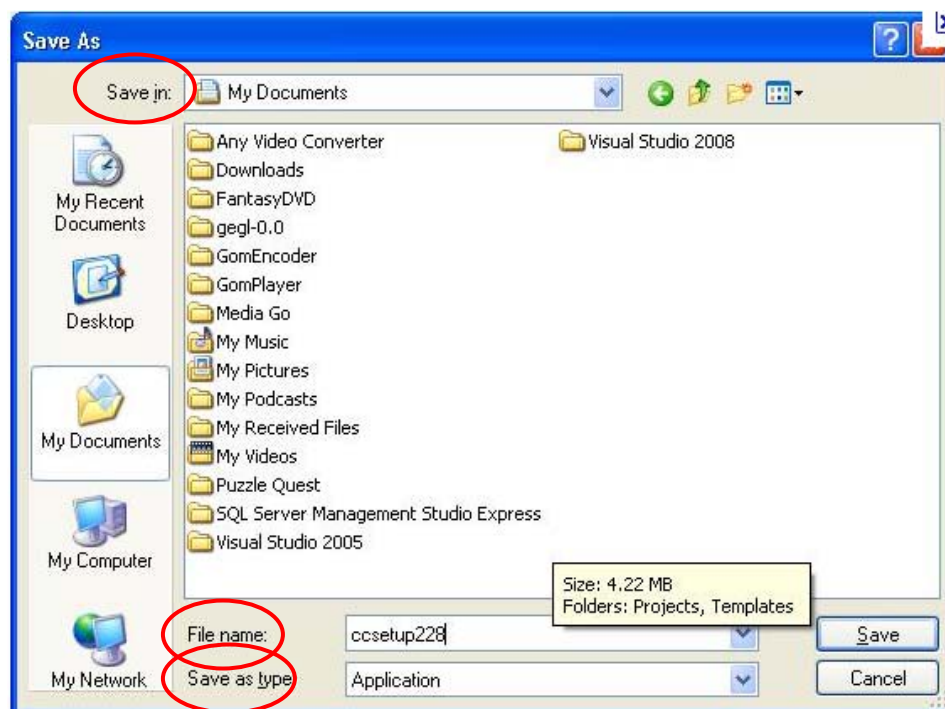
- Create a desktop shortcut by choosing Send to/Desktop
- Open, Rename, Cut, Copy, Paste, or Print a file.

Managing files from within a program

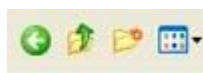
When you choose **File/Save As** or **Office/Save As** (Office 2007) from within a program such as Microsoft Word, a dialog box appears with three important features:

- “Save in” (near the top of the box)
 - A dropdown box that brings up your computer’s directory structure, to allow you to choose where to save your file.
- “File name” (near the bottom of the box)
 - Allows you to type in a name for your file.
- “Save as type” (at the bottom of the box)
 - A dropdown box that allows you to choose a format (type) for your file. The default file format will appear with the default file extension.

The picture below is an example of Office 2007 in a Windows XP environment. The picture will look different if you have Windows 7 or Office 2003 but the same features will be there.



Exploring the Save As/Open Windows

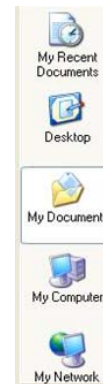


Navigation Buttons - Back / Up level
New Folder – Create a new folder

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Change Display – List, Icons, Details (varies between versions).

This is the location/places bar. They are links to commonly used storage locations.

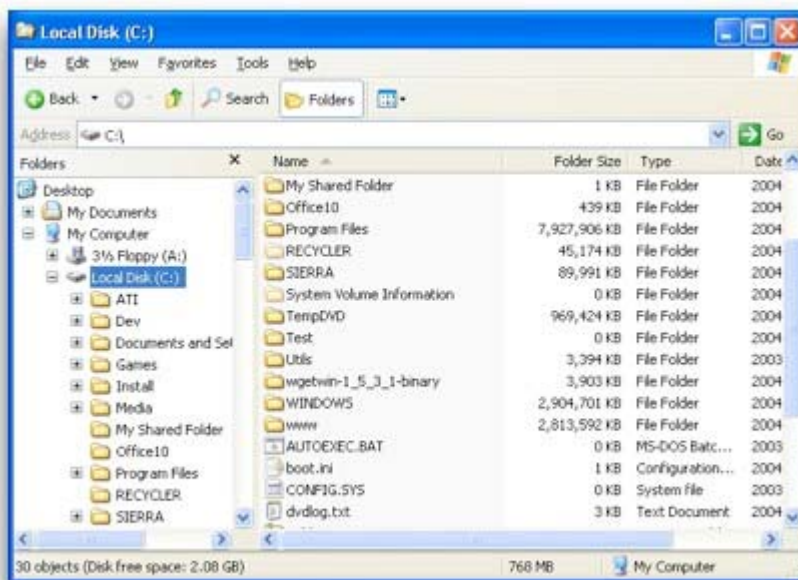


Bonus – If you right-click in the Location Bar, you can add shortcuts to customized commonly used locations. If you have Windows 7, you can add locations to your “Favorites” list.

Using Windows Explorer

In Windows Explorer, the entire folder/directory structure is always available at all times in the left-hand pane. In this respect it differs from My Computer. The right-hand pane will display files as well as folders.

Another difference between Windows Explorer and My Computer is that Windows Explorer allows you to drag-and-drop files and folders with the mouse.



In the left-hand pane, drives, folders, and subfolders are visible. To **expand** your view of the contents of a drive or folder, click on the + sign next to the folder name. To **collapse** your view of the contents of a drive or folder, click on the – sign next to the directory name.

To see the contents of a drive or directory, click once on it (i.e., select it) in the left hand panel. In the righthand pane, the contents of the selected drive or directory are then displayed. The righthand pane functions just like the windows in My Computer.

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GENERAL FILE MANAGEMENT /ORGANIZATION FUNCTIONS

Naming Files

Give files specific names that will be meaningful to you later on:

- Bad: "agenda.doc"
- Better: "agenda_072501.doc"

Most programs automatically add the correct "file extension"—a 3-letter addition to the end of the filename that identifies the type of file to your computer (.doc = MS Word document; .xls = MS Excel). In general, do not alter the file extension. You can use letters, spaces, and some symbols in your filenames

Create a New Folder

Do one of the follow options from the Save As, My Computer/Document, Windows Explorer windows:

- Go to **File/New/Folder** - A new folder appears in the current window, and the folder name is highlighted so you can enter the name.
- Click the **New Folder button** on the toolbar
- **Right-click** anywhere in the current window (not on an icon or filename) and choose New/Folder and enter the name.

You can create folders within folders. For example, you create the following types of directory/folder structures:

- Farm Operations
 - 2009
 - 2010
- Personnel
 - Employees
 - Benefits

Organizing Files within Folders

The easiest way to organize files within folders is to create the folders as you create/edit files using the options available in the **Save As** window. If you need to re-organize files that are not within folders, you have several options.

- Move Files by using Cut/Copy/Paste Functions
 - Cut/Copy/Paste functions are available using the menu, toolbar, or right-click menu.
- Move Files by using Drag/Drop functions
 - In order to use this method, you need to be able to see both the source and the destination locations, either in one window or in two windows (side by side)

This can either be done using My Computer/My Documents windows or by using Windows Explorer.

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Sorting Files

You can sort files in My Computer, My Documents and Windows Explorer by clicking once on the Name, Size, Type, or Modified header buttons as long as you are using Details View. To sort the files with the most recent listed first, for instance, click once on "Modified." To re-sort them with the earliest listed first, click again on "Modified."

Working with More than One File

To select two or more separate files, hold down the "**Ctrl**" key and click on each filename. To select a contiguous group of files in a list, click on the first filename, then hold down the "**Shift**" key and click on the last filename. All files in between will also be selected. You can then perform cut, copy, and delete functions on all the selected files.

Backup Options

It is important to remember to back up your files fairly regularly. Hard disk crashes and virus infections can cause you to lose all your important files which could be devastating to your business and/or your family.

To make backing up easier, you should follow these general guidelines.

- You only need to backup your documents/folders. You don't need to back up your programs.
- All your documents should be stored in one location so that it is easy to backup.
- Make sure you know where your important files are stored. Some programs, like Quickbooks and Outlook don't store them in My Documents.

You have several options for backing up:

- Burn to a CD/DVD
- Copy to USB Flash drive or external hard drive
- Internet/Online backup services

Carbonite www.carbonite.com

- \$55 / month
- Software that you install on your computer
- Backs up important files over the internet
- Remote access to files / Unlimited backup space

Using a USB Drive / External Hard Drive

To use the USB drive, simply plug it into an open USB port. The operating system will detect that the USB drive has been added, and will assign a letter (such as E or F) to it. Files can be added, deleted, renamed, etc. from the flash drive just like from a hard drive. When you want to remove the flash drive from the computer, click on the "Safely Remove Hardware" icon (green arrow above a small rectangle) in the lower right corner of the screen. A tiny window will open saying "Safely Remove Storage Device" (or similar nomenclature). Click on it. A window will appear saying it is safe to remove the device. Remove it by simply pulling it out from the USB port.