

Using Windows Explorer to Manage Electronic Files

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Vocabulary

Text

- Text is data that is typed into a document via the keyboard
- Text is comprised of letters, numbers, and symbols
- Text can be moved, edited, formatted, or deleted

Document

- A document is a file that contains information that the user can view or hear
Examples: word processed letter, memo, or budget spreadsheet.
- Documents are usually created and edited using programs such as Word and Excel

Files

- A file is a collection of information that a computer uses in a particular format
Example: If you create a Microsoft Word document, the file is saved so that Microsoft Word can read and open it
- Files are made up of two parts: the file name and the extension, separated by a period (filename.ext)

1) File Name – The file name is the first part of the file. The file name can be up to 255 characters long in Windows 95, 98, or 2000. Files created by the user are named by the user. When naming a file, keep the name short and descriptive. The name should describe what the particular file is about.

2) Extension - The extension is the second part of the file. It is usually three characters long. The extension tells the computer which program to associate the file with.

Example: If you create a document in Microsoft Word, the computer automatically assigns that file the extension .doc. That information tells the computer that it is an MS Word document, and should be opened using Word.

Program	File Extension
Word	.doc
Excel	.xls
PowerPoint	.ppt
Access	.mdb
Publisher	.pub

Folders and Sub Folders

- Folders are storage areas created by the computer or the user
- Folders contain a group of documents that are related by topic
- Folders are useful when managing files
- Folders can be created, named, renamed, and deleted by the user
- Note: Folders created by the computer should not be tampered with, they contain files that the computer needs to run the computer or access programs.

Drive

- Any data storage device
- Examples: Floppy Disk, CD-ROM, and Hard Drive

File Management

Creating Files

Creating a new file in Microsoft Office is easy! Simply open the program that you want to use.

Open a Program by:

- Go to the **Start** menu and *click* once
- Go up to **Programs**
- Go over to the **Program** you want to open
- *Click* on it!
- A new file is automatically created for you
- Once you are in a Program create new files by going to **File / New**

Saving Files

Note: If you are saving files to a floppy, make sure there is a floppy disk in the A: drive

- 1) Create a document that you want to save
- 2) To Save a File for the First Time:
 - Go to the **File** menu and select **Save**
 - The **Save As** window appears
 - The **Save In** box at the top of the window shows the location where you are about to save your file
 - Select the location where you want to save your file by *clicking* on the drop down arrow and selecting the drive AND folder where you would like to store the document
 - *** Keep in mind that the A Drive is the floppy drive ***
 - Type the file name in the **File Name** box
(The file name can be up to 255 characters long and may contain spaces)
 - Finish saving the file by *clicking* **Save**
- 3) Saving Changes to an Existing Document:
After editing your document you will want to save changes.
 - Go to the **File** menu and select **Save**
- 4) Save Often!!!

Note: Make it a point of saving your document before trying something unfamiliar, before printing, before switching to another application, and before leaving your computer.

If you forget to save a file before closing the program a Dialog Box will pop up and prompt you to save changes.

Opening Existing Documents

To open a saved document:

- Go to the **File** menu and select **Open**
- The **Open** window appears
- Use the drop down arrow to find the drive AND folder where the document is saved.
Once you find the file you have two options for opening it:
 - *Double-click* it
 - OR Select the file by single *clicking* on it and then *click* **Open**

Save vs. Save As...

Use **Save** when you are

- 1) saving a file for the first time
- 2) OR when you want to save changes to a file

Use **Save As...** when you want to make a second copy of the file using a different name.

For example: Save As... is useful when you have a file that is updated each semester. Use Save As... to make a copy of the file with a new name, make necessary changes, and then save the file (under the new name).

Copying Files to a Floppy Disk

A quick and easy way to copy a file (or folder) to diskette:

- 1) Right-click on the file you want to copy to diskette
- 2) From the context menu, choose Send to, then choose 3 ½ floppy (A)

To copy multiple files (or folders) to diskette easily:

- 1) Select the files you want to copy (by Shift-clicking, Ctrl-clicking, or Select all)
- 2) Right-click anywhere on the selection
- 3) From the context menu, choose Send to, then choose 3 ½ floppy (A)

File Organization

There are two ways to see the files or folders on your computer:

- **My Computer**
Double-click on the My Computer icon to see all your drives (plus a couple of extra folders). Double-click on any drive to see its contents.
- **Windows Explorer** (right click My Computer / Explore)
Windows Explorer is a Program in Windows that allows you to view the contents of the computer, hierarchy of the folders, and files and folders in each folder. It helps you organize folders and files.
 - Work with folders, sub folders, and files
 - Select, copy, and move files between folders and drives
 - Create, rename, and delete folders or files

Windows Explorer Basics

To start Windows Explorer:

- Right click on My Computer / Explore

Windows Explorer is divided into two panes:

- Left pane – Shows the Folder/Drive hierarchy on your computer.
Each folder or drive has an icon and a folder name
 - 📁 Click on the folder or drive in the left pane and its contents will be displayed in the right pane
- Right pane – Shows the contents of the selected Folder/Drive

Sub folders (folders within folders)

- Collapsing the folder (click – sign)
- Expanding the folder (click + sign)
 - 📁 Click on the +/- to expand/collapse the folder

Example:

Think of Windows Explorer as a file cabinet in your office.

- 📁 Drive = file drawer
- 📁 Folders = file folders
- 📄 File = document or letter to go in the file folder

Change the List View of Folders

Go to the View Menu to see four different views of the contents in the right pane

- Large Icons – Large picture with name
- Small Icons – Small picture with name
- List – Small picture with name in an ABC list
- Details – More info: Small picture with name, size, file type, and date modified

Creating a Filing System

What is file management?

File management is the process of organizing files and folders into a meaningful directory structure.

Why manage files?

- 📁 Locate files quickly
- 📁 Keep related documents together
- 📁 Move groups of data easily
- 📁 Facilitate file sharing
- 📁 Backup important data quickly

Inventory

The first thing you want to do is take a thorough inventory to find out what kind of files you have. Pay close attention to the file names, file extensions, and location of the files.

Organize

Once you've taken an inventory of your files and you know what you have, see what the files have in common. Think of broad categories to put the files into.

Find Some Space

Pick a place on your hard drive or network drive and begin creating your filing system, just remember the location. Keep in mind that files saved on your hard drive are only accessible by you. Files saved on a network drive are accessible by anyone with rights to that drive or folder. Saving files to network space is a good way to share files with others. You can also create a filing system on a floppy disk.

Create Folders

Now you are ready to create some folders to hold your files. The idea here is for you to have a plan that works for **you** and follow it. You can choose any type of system that fits the way that you work. You may want to create folders for the various types of documents that you generate or receive. Create some generic folders like: *Budget*, *Financial Records*, *Requisitions*, *Staff Meetings*, *Committees*, and *Course Titles*. Folder names should be short, but descriptive.

Create Sub Folders

Sub folders can be used to break a broad category down into more specific pieces.

Example:

You might be on more than one DTCC committee. Organize your committee files by:

1. Creating a Folder called *Committees*
2. Creating two Sub folders called *Budget Review* and *Professional Development*
3. Saving documents related to the same topic in folders / sub folders together

Create and Save Files

Create a file and give it a name that is both short and descriptive. File names should be something that you can remember. Since short file names are easier to work with, try to keep your file names to 20-30 characters. Remember to save files in folders and sub folders with documents of similar content.

Example:

- Bad file name - agenda.doc
- Better file name - agenda_021803.doc

Organize Files Logically

Files that are already saved on your hard drive, floppy, or network drive can be organized very easily. Use Windows Explorer to move existing files to your newly created file structure. Your file structure should be an Inverted tree structure with few folders at the top - broad category folders. Create sub folders as needed to break out the broad categories into smaller, manageable pieces.

Tip:

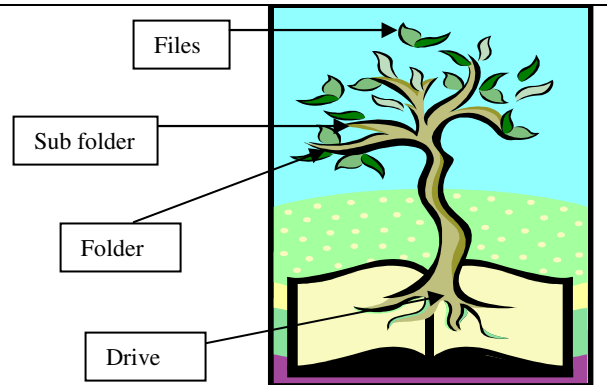
Files and folders are automatically sorted alphabetically

Use numbers for dates so they can be sorted in chronological order

Example:

Think of a filing system like a tree with many branches:

- Trunk = drive
- Large branches = folders
- Small branches extending from the large branches = sub folders
- Leaves = files/documents



Some Suggestions for Organizing Electronic Files

Subject, Course, or Project

CIS 113

Budget

Human Resources

Department or Person

Instructional Computing

Date

FY 03

File type

Word documents

Images

Create sub folders as needed

📁 CIS 113

○ Fall02

○ Spring03

📁 Budget

○ FY02

○ FY03

📁 Committees

○ Professional Development

▪ Agendas

▪ Minutes

📁 Budget Review

▪ Agendas

▪ Minutes

Maintain

Creating a filing structure is time intensive. Put a little effort into creating a good filing structure the first time around and maintaining it will be easier. Periodically check to make sure the structure is still working for you.

Back Ups

It's a good idea to back up important files on a floppy or on a network space. This will provide protection from loss of files.

Using Windows Explorer

Before saving a file to your computer or a floppy, you will want to create some folders to help you get organized.

Creating Folders

- Click once on the appropriate **drive** in the left pane to highlight it
- Go to the **File** menu and select **New / Folder**
- The **New Folder** will appear in the right pane
Make sure **New Folder** is highlighted, then type in a name for the folder.
The title **New Folder** will be replaced with the name you give the folder.

Rename Folders or Files

- Find the folder or file that you want to rename by navigating through Windows Explorer
- Click once on the folder or file you want to rename (this can be in the left or right pane)
- Go to the **File** menu and select **Rename**
- With the folder or file highlighted, type in a new name for the folder or file

Delete Folders or Files

- Find the folder or file that you want to delete by navigating through Windows Explorer
- Click once on the folder or file you want to delete (this can be in the left or right pane)
- Go to the **File** menu and select **Delete**
- The file will be deleted from its current location and placed in the Recycle Bin

Retrieving Folders or Files from the Recycle Bin

- Double click on the Recycle Bin icon on your Desktop to display contents of the Recycle Bin
- Move deleted items out of the Recycle Bin by single clicking on the item and dragging it out of the Recycle Bin
- You might want to drag the file from the Recycle Bin to your Desktop

Selecting Files

Before moving, copying or deleting files they must be selected in the right pane.

- One file – single click
- Select a continuous group of files – Click on the first file in the group / Hold down the Shift Button / Click on the last file in the group (all files in between are highlighted)
- Select a group of non-successive files – Click on the first file / Hold down the Control Button / Click on other files (just the files you click on will be highlighted)

Moving or Copying Files from Folder to Folder

- Left pane – Choose the correct drive and folder where the file is stored
- Right pane – Find the file(s) and select
- With the file selected, drag (click the mouse and hold down) the file or folder from the right pane to the destination folder in the left pane (until the destination folder in the left pane is highlighted)
- Drop (take your finger off the mouse)
- Click on the folder in the left pane to make sure the file or folder was moved to the correct place (contents of the folder will be displayed in the right pane)

Note: When you drag a file from one place to another *within a drive* → it *moves*.

When you drag files *from one drive to another* (ex: from C to A) → it is *copied*.

Closing Windows Explorer

- Click the X control button in the top right hand corner of the window