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File Management Overview

Before working with the computer, you need to understand how to manage your files, the filing terminology as well as the storage facility for AHCL.

Filing Before Computers

Before computers, all business papers, correspondence etc were filed in your own **personal filing cabinet**, in **manila folders** that stored all relevant information. **Each manila folder relates to one particular subject/issue.**

These files could be **taken away with you** – you could pop a file into your briefcase and return it to the filing cabinet once you had finished with it.

As well as having your own personal files, you may have **shared information with other people** – therefore, some organizations had filing cabinets that everyone could access and information was shared throughout the department or throughout the whole organization.

Therefore, you have:

- Filing Cabinets (personal and shared)
- Folders with information (Files) inside

If we keep these processes in mind when we look at Filing With Computers, it will help you understand how the computer files information away.

Filing With Computers

The computer filing system works in exactly the same way as we do, without computers. The only difference between the two methods is that one is tangible and one is electronic.

In your computer you have your own **personal drive (which is an electronic filing cabinet)**, within the drive you have **folders** that you store information in. **Each folder relates to one particular subject/issue.** Within those folders, you have your files relating to that topic/subject.

You can **take files away with you** – you can copy a file to a floppy drive, work on it at home and return it to your personal drive once you had finished with it.

You may have **shared information with other people** – therefore, some organizations have shared drives that everyone could access. Information can be shared throughout the department or throughout the whole organization.

Therefore, you have:

- Drives (personal and shared)
- Folders with information (Files) inside

Terminology

It does help to know some of the terminology, outlined below is a comparison of what we use to call things before computers to what we now call things with computers.

Before Computers		With Computers
Filing Cabinet	=>	Drives
Manila Folders	=>	Folders
Paper Files	=>	Files

To manage your drives, folders and files we use the program **Microsoft Windows Explorer**. This is available in all computers.

Drives that Affect You

The term 'Drive' means the storage area within the computer. Each drive is named alphabetically from A to Z. The drives that affect you the most are:

- A: Drive - This is the floppy disk drive, which allows you to take information away with you on a disk.
- C: Drive - This is the permanent hard drive on the computer. This means the C: drive is physically inside the computer.

What other drives do you have?

.....

.....

.....

.....

.....

Folders and Files

Folders are exactly like manila folders, we can create our own folders and there is no limit to how many we have. *Creating Folders is covered in Session 2: Working with Windows Explorer.*

There are a number of different file types available and this will vary from one computer to another because it all depends on the software programs available to you. Some of the more common files are the Microsoft products – **Word**, **Excel** and **PowerPoint**. Another type of file that you may become familiar with, is an **Acrobat** file.

Other files that help your computer work properly are executable files, batch files, program files, system files and initialization files. These types of files are **not safe to delete**. Keep in mind, if you do not recognise the file, do not delete it, move it or rename it. Any of the files (shown below) **do not delete, move or rename**.

Once you have logged into your computer, there are three ways to view and use your drives.

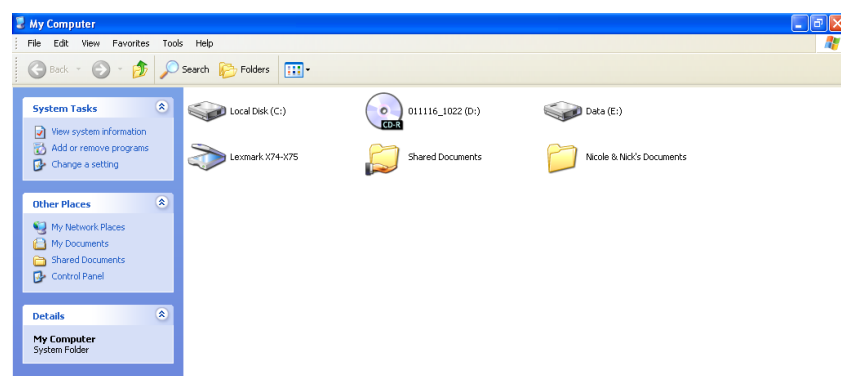
- Using My Computer (User Friendly Filing System)
- Using Windows Explorer (Windows Filing System)
- Using the Microsoft products (Word and Excel)

Working with My Computer

My Computer allows you to view your documents, folders and drives. It is the only area of the computer available to view all drives, folders and documents in the one location.

To open My Computer:

- Click on the **Start** menu
- Click on the option **My Computer**



Note: The Title Bar tells you what you are viewing, the Task Pane (blue panel on left-hand side) provides you with different functions and the images show you your drives and folders.

To view Files:

- Double Click on **Local Disk C:/**
- View the files and folders within the C:/ Drive

Naming Procedures

There are some naming rules to consider when filing your work electronically. Folders and files can contain **255 characters** in their name, this means that you can give your folder and files more meaningful names.

Each folder or file name must be **at least one character long**

You **can use spaces** when naming your folders or files

A folder or file **cannot** contain any of the following characters " /

\ + * ; : | < > ? ,

Full stops (.) are **discouraged** as this separates the file extension to the file name.

Working with File Extension

When saving a file in Word, Excel and/or PowerPoint the program automatically adds an extension address to the end of the file. An extension address is the way the computer stores and identifies what program the file was created in. It is handy to know which program a file has been created in.

- **Word** – will display with **.doc**
- **Excel** – will display with **.xls**
- **PowerPoint** – will display with **.ppt**

All extensions separate the file name and the extension address with a full stop – that is why we do not recommend that you use full stops when saving files.

Note: *There are many different extensions addresses, the abovementioned are the common ones. If you do not recognise a file do not delete, move or rename it!*

Working with your Filing System

Before storing any work into the computer, you need to organise the structure of your electronic filing system. Remember all work should be stored on your C: drive, therefore your filing system should be set up on your C: drive.

Working with Folders

To manage your files, it is recommended that you set up a number of different folders where you file specific information into the folders. The folder names need to be meaningful and relevant to your environment.

To create a Folder:

- Click on the option **Make a New Folder** from the Task Pane
- Type the **name** of the folder and press the **[Enter]** key

To rename a Folder:

- Click on the **applicable folder**
- Click on the option **Rename this Folder** from the Task Pane
- Type the **new name** of the folder and press the **[Enter]** key

To delete a Folder:

- Click on the **applicable folder**
- Click on the option **Delete this Folder** from the Task Pane
- Click on the **Yes** button

Note: Folders will reshuffle to appear in alphabetical order once you close My Computer.

Saving a Document using Word

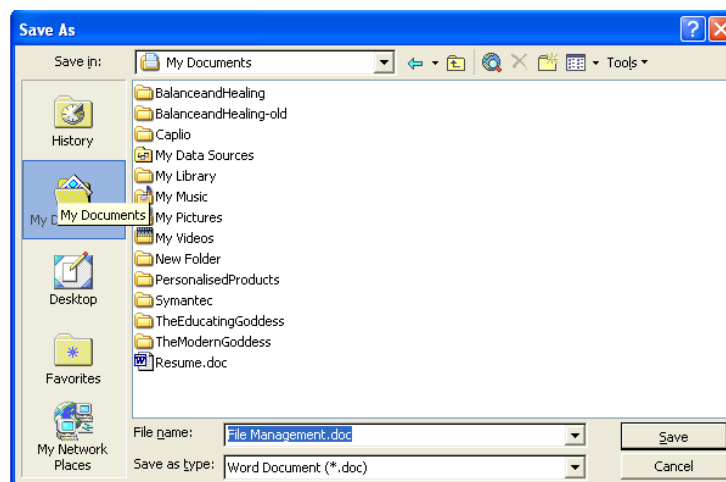
To help you understand the whole process, we are going to create a document in Word and save it in the appropriate folder. When saving a file, it needs to be given a name and this is the important part of working with your files.

To start and use Microsoft Word:

- Click on the **Start** Button
- Click on the option **All Programs**
- Click on **Microsoft Word**
- **Type** information into your document

To save the document:

- Click on the **File** menu
- Click on the **Save** command (*the Save As dialog box appears*)
- Click on the **Save in:** down-arrow to choose the drive you want your information saved in (*should be the C: drive*)
- Double click on the **Folder** where you want your information saved in
- Click into the **File name:** area (*the white box with Doc1 or Doc2 or Doc3 etc*)
- Type the **name** of the document (*be sure to delete the existing words out – Doc1, Doc2 etc*)
- Click on the **[Save]** button



Note: *If you were to go into My Computer, click on the appropriate drive and folder, you should find the file.*

Working with Files

Sometimes you may want to move your files around, copy them to a disk or even delete them. Moving a file is taking it from one place and putting it somewhere else. Copying a file is just like using the photocopier but it's electronic.

To Copy a file:

- Firstly, make sure that you are in My Computer and in the drive and folder where the file is stored
- **Click on the file** you would like to copy
- Click on the **Edit** menu
- Click on the **Copy** command (*the copy command remembers the file in the computer memory – now we need to put the file where we want to*)
- Click on the **appropriate drive or folder**
- Click on the **Edit** menu
- Click on the **Paste** command (*your file should be in the current folder as well as in your original folder*)

To Move a file:

- Firstly, make sure that you are in My Computer and in the drive and folder where the file is stored
- **Click on the file** you would like to copy
- Click on the **Edit** menu
- Click on the **Cut** command (*the copy command remembers the file in the computer memory – now we need to put the file where we want to*)
- Click on the **appropriate drive or folder**
- Click on the **Edit** menu
- Click on the **Paste** command (*your file should be in the current folder and no longer in the originally folder*)

To Delete a file:

- Firstly, make sure that you are in My Computer and in the drive and folder where the file is stored
- Click on the **File**
- Press the **[Delete]** key on your *keyboard* (a message will appear asking are you sure you want to delete the file)
- Click on the **[YES]** button to confirm your *deletion* (if you don't want to delete, be sure to click on the **[NO]** button)

*Note: The important thing to remember here is that once you delete a file, you will not be able to get that file back easily. **So think carefully before deleting any file!***

The Recycle Bin

The Recycle Bin is a temporary trash can and when you delete a file it is moved to the Recycle Bin. The Recycle Bin can be found on your Desktop.

To restore a file from the Recycle Bin:

- Double Click on the **Recycle Bin icon**
- Click on the **File**
- Click on the option **Restore this Item** from the Task Pane (*the file will be place back in the folder you deleted it from*)

If you delete from the Recycle Bin, the file is gone!