# SECTION 5 - FILE MANAGEMENT

**What are directories and files?**
**Where should I save information?**
**How do I do that?**
**How do I move or copy files?**
**How do I delete files?**
**How do I create directories?**
**What files am I responsible for?**
**How can I find a file?**

⇒ **INTRODUCTION**

File management is basically the same whether it applies to a metal filing cabinet or a computer. There is a finite space. Files are stored in folders or directories, which may be split into sub-folders or sub-directories. The choice of which folders or sub-folders to store information is up to you. When we talk about file management we mean saving files, moving and copying files, deleting files and maintaining those files within an efficient file structure of folders and sub-folders.

⇒ **WINDOWS EXPLORER AND MY COMPUTER**

The two basic tools for file management are Windows Explorer and My Computer. It's up to you which you choose. My Computer is on the Common Desktop menu (usually at the top). Windows Explorer can be accessed through *Start* then *Programs* then *Windows Explorer* (near the bottom of the menu).
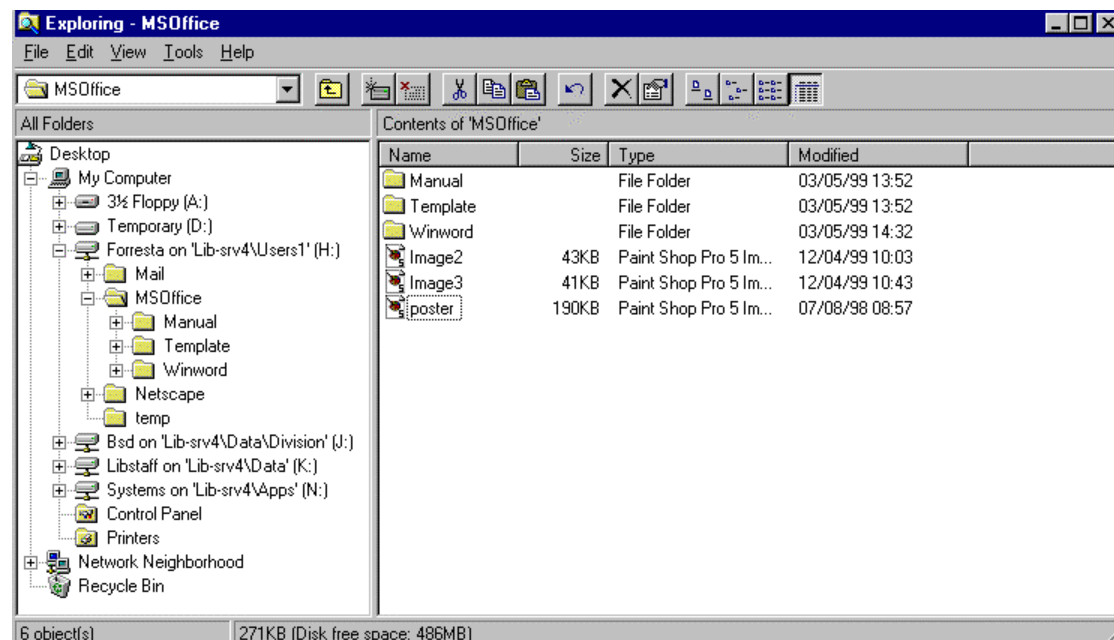


This shows the tree structure of folders and sub-folders. Using the image of the tree: the drive is the trunk, the folders the branches, the sub-folders the twigs and the files the leaves (sorry to push the metaphor!).

This example shows one of the folders in H: (MSOffice)open on the left, with its contents on the right. The open folder icon shows you exactly where you are.  If you go into one of the sub-folders (e.g. click on manual) the sub-folder icon for manual opens on the left and its contents appear on the right.
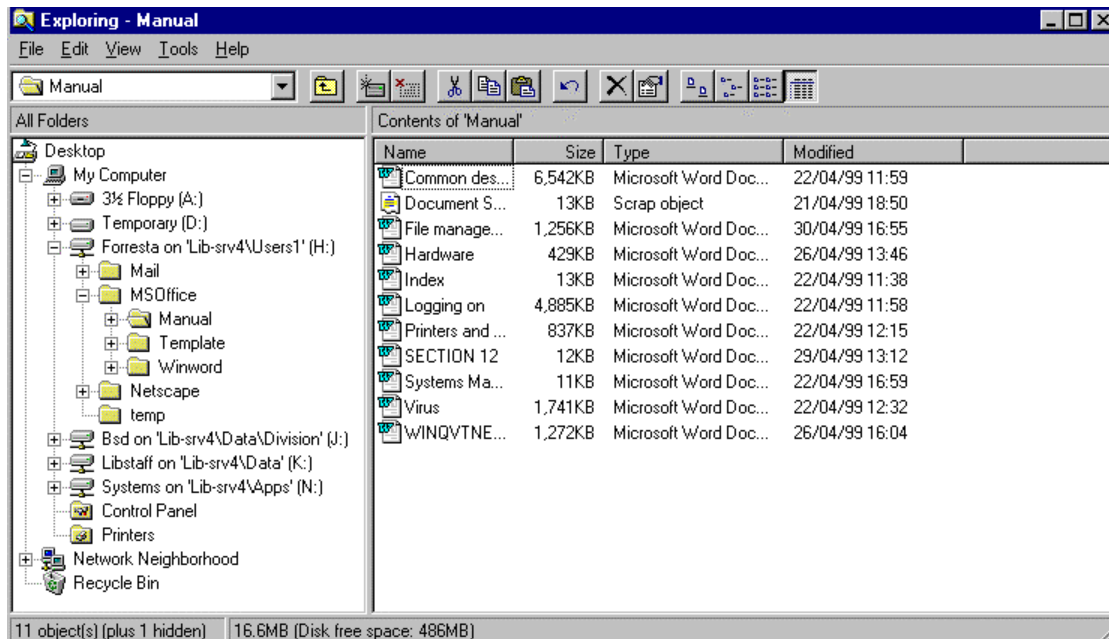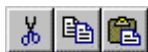


*Toolbar*



From the toolbar you can choose to: go up a level, map a network drive, disconnect a network drive, cut, copy, paste, undo, delete, (show) properties and change how the files are displayed.



Go up a level



Map a network drive, disconnect a network drive



Cut, copy, paste



Undo



Delete, properties



Display choices: Large icons, small icons, list, details

You can change the display of Windows Explorer and My Computer by using the four icons on the top right hand side of the tool bar. These change the amount of information you are shown about the files on the right. The examples above show the fullest listing 'details'.

*Icons*
In both Windows Explorer and My Computer the icons are all a standard format e.g. a yellow folder represents a folder or sub-folder, a Word file is represented by a document with a pale blue W on the corner.

⇒ **SAVING**

*Where?*
The space where information is stored is not infinite. It should be adequate provided large amounts of information are not stored unnecessarily, duplicated or stored in the wrong place.

*What drives should I use?*
When you use drives J:, K: and H: you are using a shared space.
When you are using drives A: and D: you are using your own space.
- Drive K: is a shared drive on a shared space (Held on Lib-Srv4, accessed by all Libstaff)
- Drive H: is your personal drive on a shared space. (Held on Lib-Srv4 but only you can access it)
- Drive J or N: is a shared drive on a shared space. (Held on Lib-Srv4, accessed by your department/division)
- Drive D: is your personal drive on your personal space (i.e. your pc's hard drive, accessed by anyone using your PC).
- Drive A: is your personal drive on your personal space (i.e. your pc's floppy drive, accessed via floppy disk n.b. formatted)

Note: Drive E: is your personal drive on your personal space (i.e. a CD-Rom drive) not all pc's have this.

*What should be stored where?*
A file which is personal to you should be stored on H: where no one else can gain access. A file which is of interest to your department only might go on your Divisional Drive J: ( You can check which that is by asking your head of department). Anything you need library staff to see should go on drive K:. Before putting anything on drive K: please take time to look at the file structures that are already there. There are set folders for certain things e.g. folders "Staff" and "Jobads"
A file that is very large or a program that is only used by one person should be stored on the hard drive D: of that persons machine, not on H: or K:. Please check with Systems before installing any programs on your machine.

*How?*
To save files (using the example of a word document) choose *File* then *Save As.* The following box will be displayed
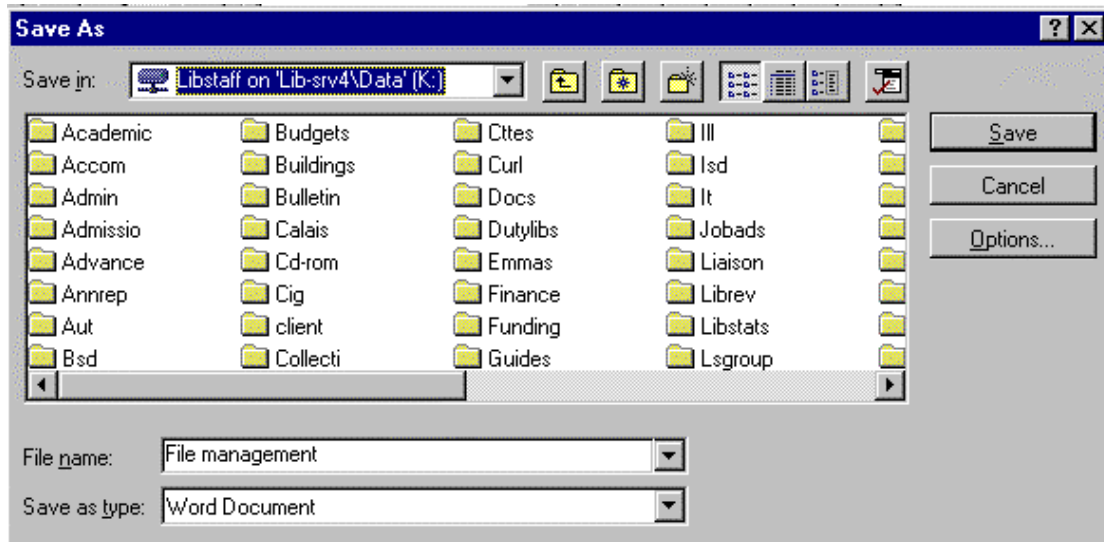
Choose the drive in which you want to store your file by using the scroll down menu in the *Save in* box.  This will show all the drives you have access to.  Highlight the drive you want.  In the above example the file is being save in "Libstaff on 'Lib-srv4\Data'(K: )

Having chosen the correct drive you will be shown all the folders within that drive.  Highlight the folder in which you want to save the file by double clicking on the yellow folder with your left mouse button.  If there are sub-folders  you may have to choose appropriately.  If you don't want to save in a sub-folder but want to save in the root folder (or parent folder) go on to naming the file.

*Naming the file:*

Once in the correct folder or sub-folder you can then enter a name in the *File name* box.  Try to use something which will be easy to remember, especially if you are not going to be using the file very often.  Try to keep to any naming conventions that have already been set up e.g. for meetings the date is a useful filename.

The *Save as type* box should automatically know what type of file you are working on and will default to the correct type e.g. Word Document. But it's as well to check just in case. T hen click on *save*.

The egg-timer may appear, wait until the *Save as* box has gone before continuing.

*Using Save rather than Save As*

If you are re-saving a document you can choose *save* from the menu rather then *save as*.  This will automatically be saved in the place which the file was saved in originally.  If you forget to save before closing you will be prompted "Do you want to save changes to **File Name**" Click on *yes* if you do.


⇒ **AUTOSAVE IN WORD**

Autosave is used to save files automatically as you work on them. This is not the same type of save as you do manually. Autosave can be set to work at a specified number of minutes e.g. after 10 minutes your machine will make a backup of your work.  To set up autosave choose *Tools* then *Options* then *Save*. You will be shown the following box:
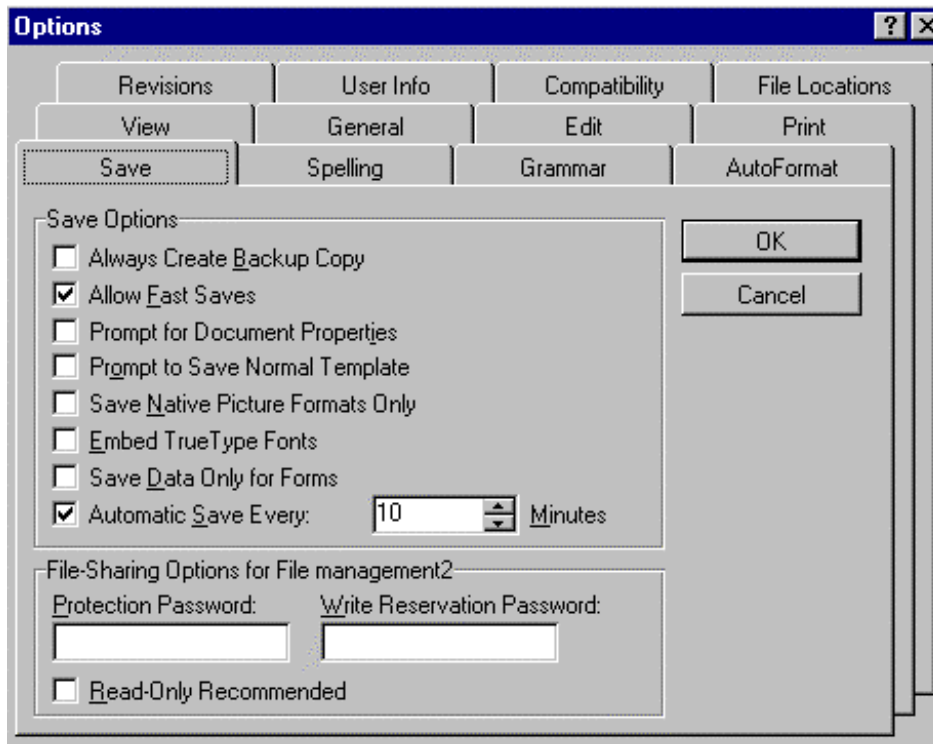
The *Save Options* are listed.  The bottom options shows the *Automatic Save* Box which in the above example is set to 10 Minutes.  If you watch your PC the lights will flash to indicate when the autosave is working.  You may also get a box showing the progress of the save (this will flash very quickly).


⇒ **TEMP FILES**

Temp files are created as backups by the system.  If you have any problems before you have actively saved a file autosave may have created a temp file which can be retrieved.  Please e-mail any problems with saving files to Helpdesk and we can try to access the temp files for you if necessary.


⇒ **MOVING AND COPYING FILES AND DIRECTORIES**

You can change the location of files or make a copy in two ways.  The first is to open the file and save it again in a different place.  The second is to use Windows Explorer or My Computer.

*Moving and copying open files*
• Copying:
With the file open e.g. a Word document, choose *Save as,* choose the folder in which you want to save the file and click on save.  The file will keep its name the same.
To make a copy of the file in the same directory you will need to rename the file slightly.
• Moving:
Follow the same procedure as copying, you will then have to delete the original file Note: Never delete a file which you did not put there yourself unless told to do so by the owner of the file.

*Moving and copying in Windows Explorer*
Go into the drive and directory where the file you want to copy sits.  Right mouse click on the file. This will give you the following box:

**Open**
Print
New
Quick View

Send To ▶

Cut
Copy

Create Shortcut
Delete
Rename

Properties
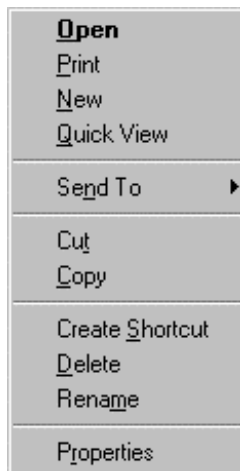
Choose *Copy*. Then go into the target folder into which you want to copy the file.  Right click anywhere in the contents box and choose *Paste*.
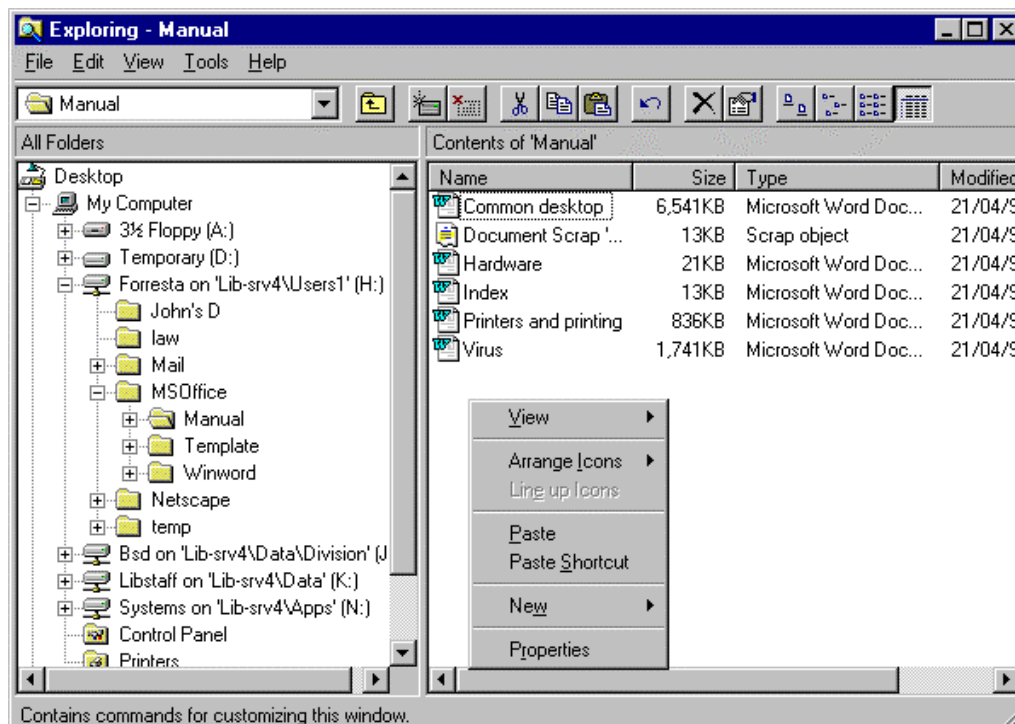


This example shows the target folder (Manual) open on the left.  Its contents box is on the right.  The example also shows the small grey box which appears when you right click, with the position in which to right click i.e. on any of the white space in the right hand box.

*Moving files  by dragging icons*
You can also move files by dragging icons from one folder to another.  Drag the icon of the folder to be moved on top of the target folder.  A word of warning: be very careful with moving things this way. It can lead to confusion if you accidentally drop the file onto the wrong folder icon.
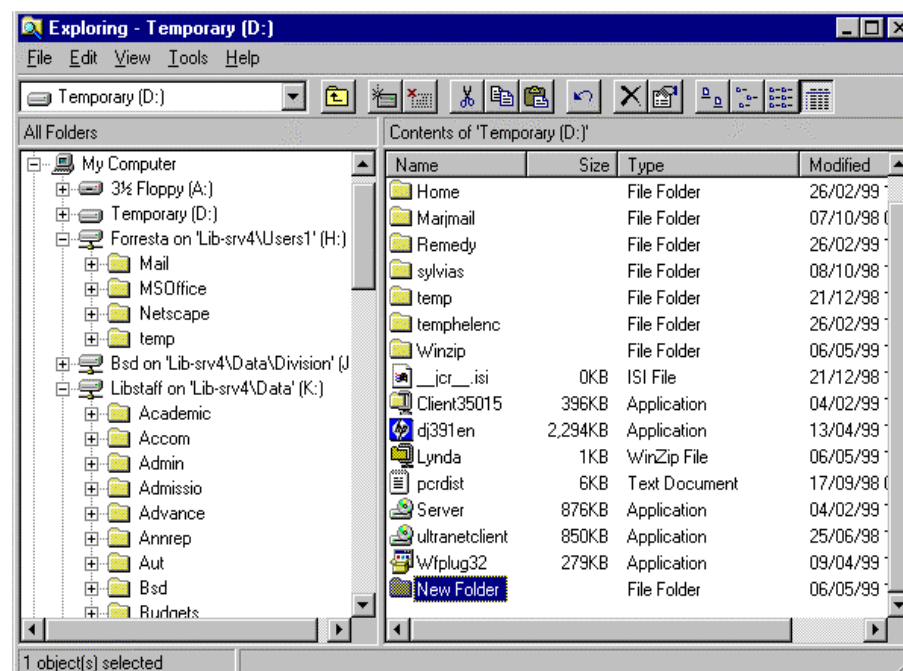
⇒ **CREATING A FOLDER**

- *In Windows Explorer:*

To create a new folder or directory choose *File*, then *New* then *Folder* (as shown in the example below).
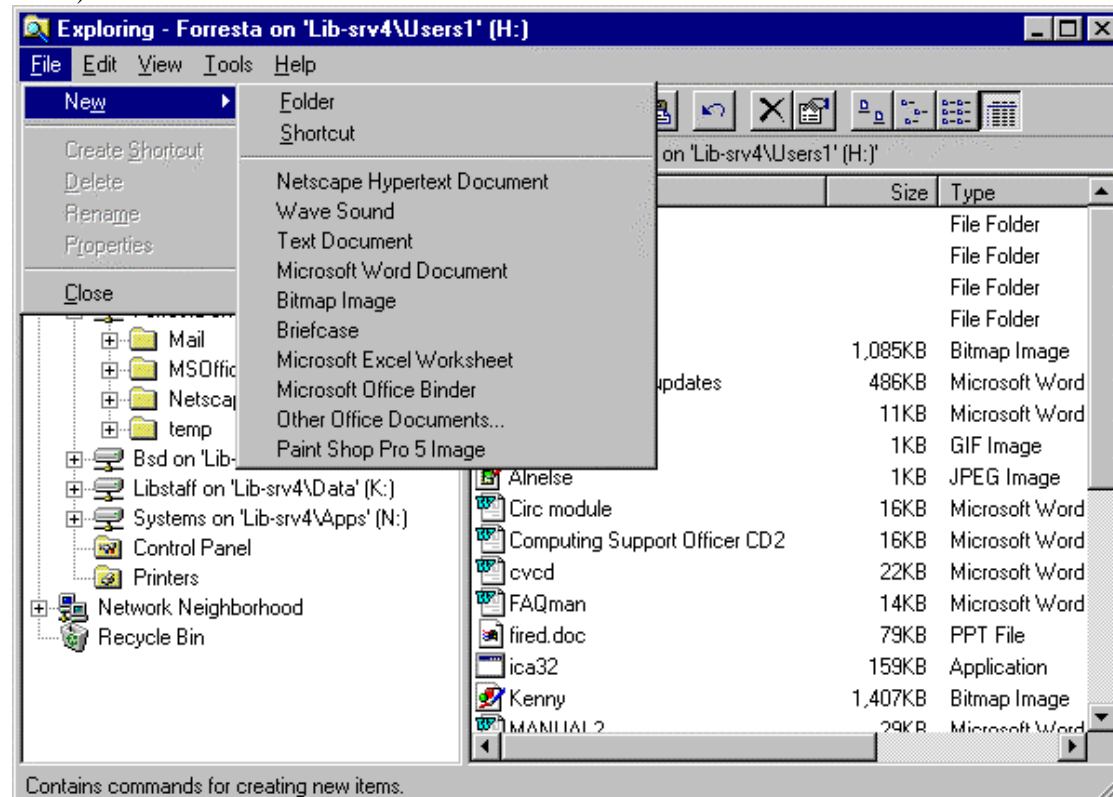


Once you have chosen *folder* you will then have to name it. You will be shown a new folder icon with "New Folder" highlighted (see below). Type over the new folder name with whatever you want to call your folder.



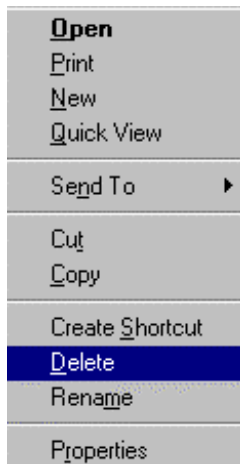Once the folder is named press return.

*Renaming a folder*

To rename a folder right click on the folder and choose *re-name* for the menu. Type in what you want to call the folder and press return.
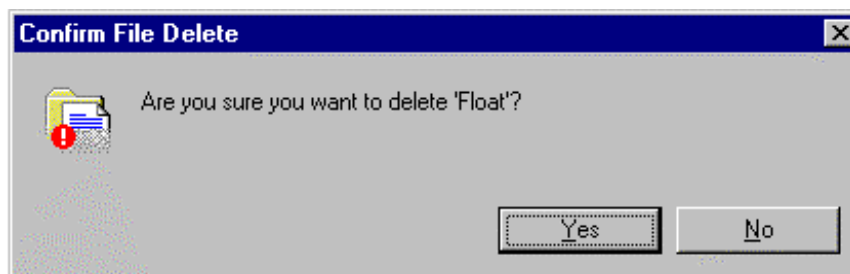
$\Rightarrow$ **DELETING**

Be very, very careful when deleting anything.  The golden rule is only delete what you have put there yourself (unless the owner of the file asks you to).

To delete in Windows Explorer:   Find the file you want to delete. Right click on it.  The following box will appear. Choose *Delete*.

```
Open
Print
New
Quick View

Send To              ▶

Cut
Copy

Create Shortcut
Delete
Rename

Properties
```

You will then be asked to confirm with this box:

```
Confirm File Delete                                    ✕

        Are you sure you want to delete 'Float'?


                              Yes            No
```
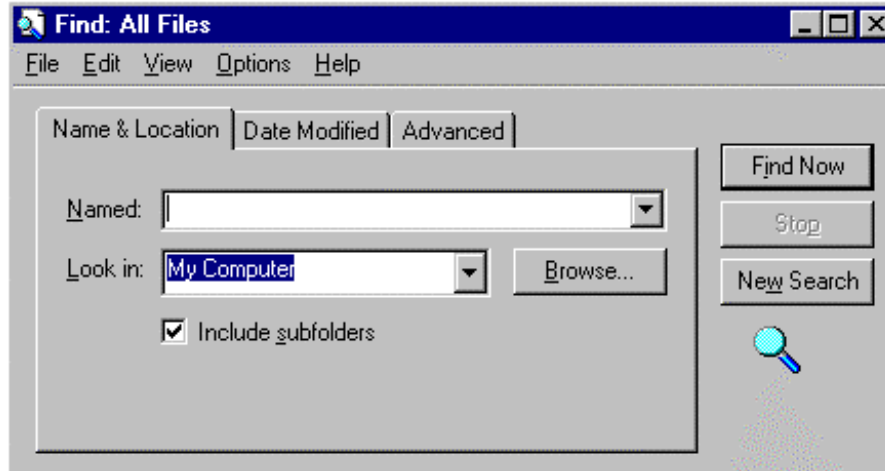
Choose <Yes> if you're sure and the file will be deleted.

## SEARCHING FOR FILES

There is a search facility in file management which is accessible from the Common Desktop menu. Choose *Start* then *Find* then *File or folders...* The following box will be displayed:



You can search for a file by typing in the correct file and extension e.g. file management.doc then clicking on the drop down menu in the *Look in* box to pick the drive in which you think the file is e.g. H: Then choose <Find now>.  A box should appear with the drive and path (i.e. folder\sub-folder) of the file.

If you are unsure of the exact name or file extension you can use wild cards.
Examples:
- File management.* (Where you are unsure of what file extension it is)
- File man*.* (Where you are unsure of what the name is exactly)
- *.doc (Where you know it is a Word document but don't know what it is called....depending on the drive you are looking in this search could take a long time)

These files will produce a list of files which closely match your file.  You will be able to see the path. The example below shows two files. Both in the MSOffice folder on H: one in sub-folder Winword the other in Manual.
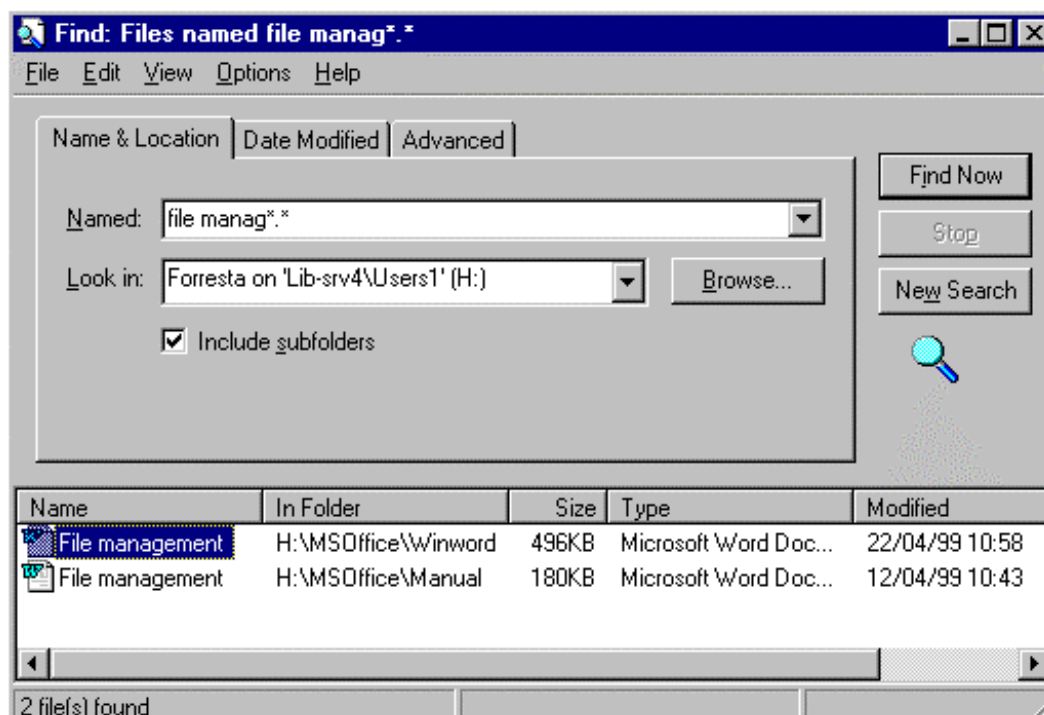
## ⇒ **WHAT FILE MANAGEMENT AM I RESPONSIBLE FOR?**

You should use space as efficiently as you can.  Clean out old or duplicated files, and make sure that you store files for correct access.  For example files for libstaff use are stored on K: whereas files for your own use are stored on H: or D: (if they are large files) .

You are responsible for maintaining your H: and D: drives.  You are jointly responsible for maintaining your divisional J (or N): drive and K: drive.