CHAPTER 3

Keeping Track of Your Files and Settings

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GETTING ORGANIZED (AND STAYING THAT WAY)

You're about to start working on a new report or presentation. What's the best way to get started? Where should you save your file? How do you find that file tomorrow, or next week, or next month? How do you protect yourself from the inconvenience (to put it mildly) of losing a document you've worked on for hours?

Those are the questions we tackle in this chapter. Relax—we're not going to force you to change the way you handle your homework or your projects. It helps if you can stick to a sensible file-naming strategy, and you'll have best results if you have a clear understanding of where and how Office stores files. Whether you file every scrap of paper that goes across your desk or just throw everything into a shoebox, Office has a set of tools for you to use. At the end of this chapter, we introduce you to an amazing search tool that can help you pick out any Office document, even if all you can remember is a word or phrase it contained.

WHERE SHOULD YOU KEEP YOUR FILES?

In Windows XP, the files you create belong in one place: the My Documents folder. This folder is a part of your personal profile, which is created when you set up your user account in Windows XP. Using this folder as the default location for your personal data files makes it easier for you to find and back up files you create.

In Windows XP, the My Documents icon is never more than two clicks away—it's located at the top of the right column in the Start menu, and in Windows Explorer it's just below the Desktop. When you click the File menu and choose Open or Save As from within any Office program, the resulting dialog box takes you straight to the My Documents folder. As we'll discuss a bit later in this chapter, you can also get to the My Documents folder by clicking its icon in the Places Bar along the left side of those dialog boxes.

TIP FROM

Although most of your files will be stored in the My Documents folder, you might need to store files elsewhere under certain conditions. For example, if you've created a PowerPoint presentation and you want someone else to be able to work with it, you might choose to save it in the Shared Documents folder (you'll find the icon for this folder in the My Computer window). Files in this folder can be opened by anyone who logs on to the same computer, even if they do so with a different user account. Those files can also be accessed over a local network.

The My Documents icon on the desktop, in Windows Explorer windows, and on the Windows XP Start menu is actually a *shell extension*—a virtual folder like the My Computer and My Network Places icons, not an actual physical location. Opening this shortcut opens the folder that's registered as the Documents location for the user who's currently logged on. The exact physical location of the My Documents folder varies, depending on which Windows version you have installed and whether it was a clean installation or an upgrade.

On most computers running Windows XP, the My Documents folder appears in your *user profile*, normally `C:\Documents and Settings\<username>\My Documents`.

If you currently store data files in other locations and you're willing to reorganize your storage system, you can substantially increase the odds that you'll find files you're looking for when you need them. Doing so also makes it easier to back up data files.

You can change the default location that individual Office programs use for data files; it's also possible to point the My Documents shortcut to another location. (Oh, and if the name bugs you, just change it.)

TIP FROM

To move the My Documents folder to a new location, right-click the My Documents icon, choose Properties, and click Move. Pick the folder where you want your personal documents to be stored, and then click OK or Apply. If you want to leave all your documents in their current location and point the My Documents folder to a new location, enter the full path to that folder in the Target box and click OK. To rename the My Documents folder, open Windows Explorer, right-click the My Documents icon, and choose Rename from the shortcut menu. Renaming the shortcut doesn't change the actual name of the folder to which it points.

Finally, you can change the default working folder for any individual Office program, although the exact procedure is slightly different, depending on the program you're working with. Why would you want to reset the default working folder? Maybe you're working on an extended class project that requires constant access to files on a shared network folder. In that case, you might want to define that location as the default working folder; whenever you choose File, Open or File, Save As, the dialog box will display the contents of this folder. Follow these steps, for example, to adjust the default document folder in Word:

1. Choose Tools, Options, and click the File Locations tab. The dialog box shown in Figure 3.1 lets you specify a wide range of system folders.
2. In the File Types list, select the Documents entry.
3. Click the Modify button; then use the Modify Location dialog box to browse through drives and folders. Select the correct folder and click OK.
4. Click OK to close the Options dialog box and save your change.

Follow the same basic procedure for Excel and PowerPoint, with the following exceptions: In Excel, click the General tab; in PowerPoint, click the Save tab. In the box labeled Default File Location, enter the full name and path of the folder that you want to specify as the new default. Only Word allows you to browse through drives and folders to find the one you want; with other Office programs, you must enter the full directory path (complete with drive letter and backslashes to separate folder names) manually.

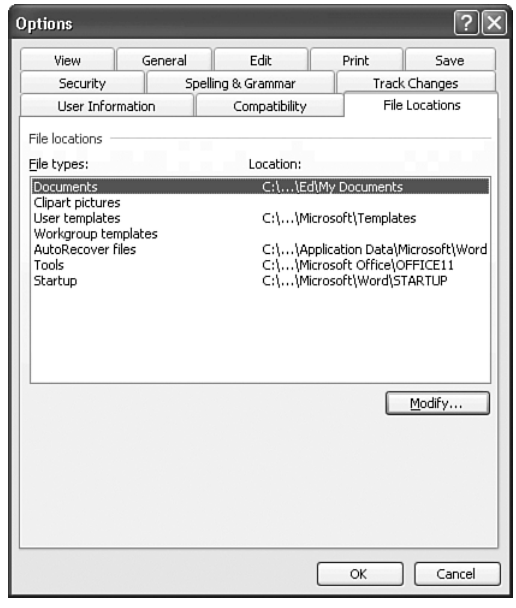

Figure 3.1
Use the Options dialog box to adjust the default working folder for any Office program.

The default file location setting for each application is independent. If you set Word's default Documents folder to a location on your network, for example, Excel and PowerPoint continue to open to the default location—typically the local My Documents folder.

TIP FROM

Curiously, several other settings in Word's File Locations dialog box apply across the board to all Office applications. If you change the location of the Templates or Workgroup Templates folder in Word, that change applies to Excel and PowerPoint as well. Specifying the Workgroup Templates folder here is an ideal way to make sure that individual users on a network always have access to the most current templates in the three main Office programs. Users can continue to save and open personal templates in their own folders, but any Word, Excel, or PowerPoint template in the Workgroup Templates folder will "automagically" appear in the New dialog box of all three applications. This setting is most useful on a business or school network.

Behind the scenes, Office creates and uses an additional group of subfolders in the Application Data folder within the user's personal profile. These subfolders represent standard locations where Office stores customization data, such as your Excel Personal macro workbook, any custom templates that you create in any program (stored in the Templates folder), custom dictionaries (in the Proof folder), and Word startup templates (in the `\Word\STARTUP` folder). On a default Office installation, these subfolders are typically located within the `%appdata%\Microsoft` folder. Office maintains separate subfolders for each application, special-purpose folders for use by all Office programs, and a folder for Office itself.

TIP FROM

In the previous paragraph, `%appdata%` refers to an *environment variable* that uniquely identifies a system folder on a computer running Windows XP. Typing this variable, complete with the surrounding percent signs, opens the target folder. Using this variable saves you keystrokes and enables you to create shortcuts that work for different users without modification and without having to worry about the exact drive or folder location. You can use environment variables in the Run dialog box, in an Open or Save dialog box, or in the Target box of a file or program shortcut, for example. Other useful Windows environment variables that we use in this book include `%programfiles%` (which opens the Program Files folder) and `%userprofile%` (which goes directly to the personal profile of the currently logged-on user). To see a full list of environment variables, open Control Panel's System option and click the Advanced tab.

Finally, Office stores a small number of data files in a second Application Data folder. This subfolder is stored in the hidden Local Settings folder within each user's profile. Most notably, this is the default storage location for Outlook Personal Store (PST) files, which contain, among other things, each user's Outlook e-mail and Contacts.

➔ To learn more about how to manage PST files, **see** "How Outlook Stores Data," **p. 186**.

OPENING AND SAVING FILES OVER A NETWORK

Office 2003 lets you work with files over a network or on the Web in much the same way that you access files and folders on a standalone PC. If you are connected to a network at your office or school, contact your network administrator to find locations on the network where you're permitted to read or write files. You should get a network share address for the location, using *UNC syntax* (`\\Servername\Sharename\`). Unless the network administrator has restricted your rights, you can create and manage your own subfolders in this location.

Although you can type UNC-style network addresses directly from within Open or Save As dialog boxes, doing so is usually more trouble than it's worth. For easier access, browse to the My Network Places folder and click your way to the correct server, share, and folder.

Aside from the additional navigation steps, there is no difference between using network shares and using local drives, assuming that you have proper authorization from your network administrator.

STORING FILES ON THE WEB OR AN INTRANET

If you're using Office to create documents that will be used on the Web, you can save your files directly to a web server or to an FTP server—the process is almost as simple as working with files on a local network. You can usually open a Web-based file by copying the URL from your web browser's Address box and pasting it into the File Name box on the Office program's Open dialog box. On servers that support the Web-based Distributed Authoring and Versioning (WebDAV) standard, you need only the URL for the location (for example, `http://www.example.com/someplace or ftp://example.com/incoming`) and logon credentials (a username and password) to save files to that location. In Windows Explorer, collections of

documents on a WebDAV-compatible server appear as folder icons in the My Network Places folder. (In previous Windows and Office versions, this feature was known as *Web folders*.)

NOTE

For more information about the WebDAV standard, including technical information and lists of compatible servers and applications, visit Greg Stein's superb WebDAV Resources site at `http://www.webdav.org`.

To save a file to a web server or an FTP site on the Internet or an intranet, choose File, Save As and click the My Network Places icon in the Places Bar. If the list of available network places includes the location you want to use, double-click it and then enter a filename. If the location does not have an icon in the My Network Places folder, enter the full URL for the location and then fill in your logon credentials when prompted.

By default, Windows automatically populates the My Network Places folder with the names of all available WebDAV-enabled servers and shared network folders on the local network. You can manually add, remove, or rename a network place—on a local network, on a remote server, or on the Internet—by opening the My Network Places folder in Windows Explorer and clicking the Add Network Place shortcut.

NOTE

Intranets are most commonly found in larger businesses. They're still rare in small businesses and school networks. From a technical standpoint, there are almost no differences between publishing to an intranet web server and publishing to one on the Internet. The format of the URL that you use likely will be different–intranet servers are typically identified with a one-word name (such as `http://marketing`) rather than a fully qualified domain name (such as `http://www.example.com`). You'll likely encounter different security issues, including password-protected logons and possibly disk quotas (which limit the amount of disk space that a user can fill with web content) on both types of server.

CREATING NEW FILES

When you choose File, New in an Office 2003 program, the New Document, New Workbook, or New Presentation task pane opens (the exact name varies depending on the Office program in use). As Figure 3.2 illustrates, these task panes are well organized and fairly self-explanatory. Choose an option from the New block at the top of the task pane to create a blank document or to create a new workbook, database, or presentation from an existing file. Select from the Templates list if you want to see a complete list of available templates.

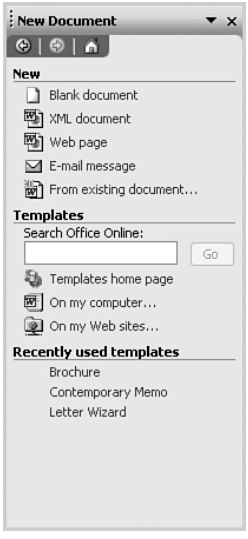

Figure 3.2
Every Office program offers a variation of this task pane, which gives you options for creating a new blank file or one based on existing content.

The top of the Templates section includes a search box and link that go directly to Microsoft's Office Online site. Click here to open your web browser and look for custom templates that match the needs of your current project. Click On My Computer to select from templates available in the current Office program; the resulting tabbed dialog box is built on the fly from two (and, in some cases, three) sources:

- The default collection of Office templates is stored in a subfolder that corresponds to the system's current language settings; on a default U.S. English installation, this is `%programfiles%\Microsoft Office\Templates\1033`. All users of the current system see these templates.
- Each user's custom templates are stored in the location specified for User Templates. By default, this is `%appdata%\Microsoft\Templates`. The actual location can be changed in Word's File Locations dialog box. Choose Tools, Options, and, on the File Locations tab, click User Templates and then Modify.
- If you've used Word's File Locations dialog box to specify a Workgroup Templates folder, Office displays templates from this location in the New dialog box as well. If a template in the Workgroup Templates location and one in the User Templates location have the same name, the Office program displays and uses only the one from the User Templates location.

NOTE

The default Office installation does not install all available templates; instead, you'll find shortcuts to some templates in the task pane and New dialog box. The first time you use one of these templates, Office attempts to install the supporting files. Word, Excel, and PowerPoint templates are covered in Chapter 15, "Mastering Styles and Templates"; Chapter 17, "Getting Started with Excel"; and Chapter 22, "Getting Started with PowerPoint," respectively.

If you're having trouble finding templates that you've saved, see "Putting Templates in Their Place" in the "Troubleshooting" section at the end of this chapter.

Although you can manage the contents of template folders in an Explorer window, the easiest and safest way to make new templates available to an Office program is to save the file in Template format. After creating the Word document, Excel workbook, or PowerPoint presentation that you want to use as a template, follow these steps:

1. Choose File, Save As.
2. From the Save As Type drop-down list, choose Document Template (Word), Template (Excel), or Design Template (PowerPoint). The dialog box displays the contents of your User Templates folder.
3. To add the new template to one of the existing tabs, click the Create New Folder button and add a folder with the same name as the existing tab. If you want to create a custom tab for the Templates dialog box, specify a new folder name. If you don't select a subfolder here, your new template will appear on the General tab of the Templates dialog box.
4. Type a name for the template and click Save.

NAMING DOCUMENTS

After you create a new file, the first thing you should do is save it, and as you work on it you should get in the habit of saving it regularly. What's the best name to use? If the file is for your own personal use, you can make up your own file-naming system. If you're working as part of a team in a small office or classroom, you'll want to devise a standard that everyone can agree on, and then follow that standard.

Whether the file-naming system is just for you or for an entire team, the most important guideline is to be consistent. As we explain in this chapter, you can use a variety of search tools to find just about any file. But a file with a descriptive name is much easier to pick out of a list. Some people begin each filename with a keyword (*report*, *homework*, *budget*) that helps define the type of content. You might want to add the creation date (using a format *YYYYMMDD*) to help you see at a glance which version of a file is the most recent one: "Homework - English 101 – 20051031" is pretty descriptive, wouldn't you say?

Regardless of how you choose to name files, be sure you know the file-naming rules that apply to all Office documents:

- A filename can contain any *alphanumeric* character, including the letters A to Z and numbers from 0 to 9.
- A filename can be as short as 1 character and as long as a total of 255 characters, including the full path—drive letter, colon, backslashes, and folder names included.

CAUTION

The rules governing maximum length of a filename include the full path. For this reason, moving a file with a long name can cause problems, especially when the destination folder is deeply nested. In practice, you can avoid this problem and still have descriptive names if you keep filenames to a maximum length of about 40 characters.

- The following special characters are allowed in a filename: $ % - _ @ ~ ` ! ( ) ^ # & + , ; =.
- You may use spaces, brackets ([ ]), curly braces ({ }), single quotation marks, apostrophes, and parentheses within a filename.
- You may not use a slash (/), a backslash (\), a colon (:), an asterisk (*), a question mark (?), a quotation mark ("), or angle brackets (< >) as part of a filename. These characters are reserved for use with the file system, and you'll see an error message if the name you enter includes any of these characters.
- Office files typically include a three-letter *extension*, which is added automatically by the application that created the file (such as .doc for files created by Word). File extensions define the association between a document type and the program that is used to create it. However, a file extension is not required, nor are file extensions restricted to three characters. We don't recommend changing extensions unless you understand the full consequences of doing so. To force an Office program to use the exact name and extension that you specify, enter the full name, including the extension, between quotation marks. (Filename extensions are normally hidden; to make them visible, open Control Panel, Folder Options, click the View tab, and clear the Hide Extensions for Known File Types check box.)

CAUTION

If you use a nonstandard file extension, you might be unable to open the file from an Explorer window. Also, files that include unregistered file extensions do not appear in the Open dialog box unless you choose All Files from the drop-down list of file types.

- A filename may contain one or more periods. Windows treats the last period in the name as the dividing line between the filename and its extension.

NOTE

Windows filenames are not case sensitive. Office ignores all distinctions between upper- and lowercase letters when you enter a filename in an Open or Save As dialog box.

USING AND CUSTOMIZING COMMON DIALOG BOXES

The Open and Save As dialog boxes used throughout Office have a series of shortcut icons on the left side, called the *Places Bar* (see Figure 3.3), and are designed to speed navigation

through common file locations. With a small amount of effort, you can easily customize these icons in dialog boxes used in all Office programs. The default icons are as follows:

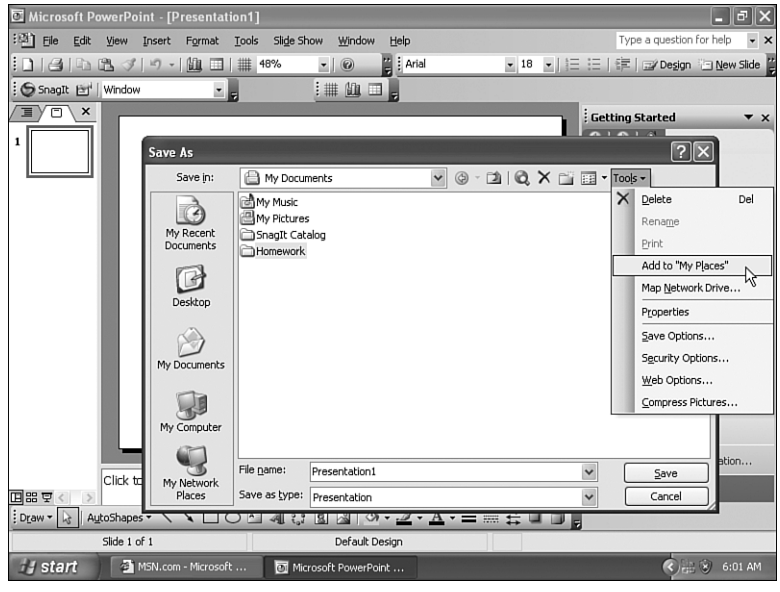

Figure 3.3
Customize the Places Bar by adding shortcuts to commonly used data folders; to see more choices, right-click the Places Bar and choose Small Icons from the shortcut menu.

NOTE

Although these dialog boxes look exactly like the ones you find in other Windows programs that aren't part of the Office family, they aren't the same. If you customize the Places Bar in Windows (using Microsoft's very cool but unsupported Tweak UI Power Toy), your changes do not extend to the Places Bar in Office programs. Likewise, if you customize the common dialog boxes in Office, the changes don't appear when you use other Windows programs.

- **My Recent Documents**—Opens the Recent folder, which contains shortcuts to files and folders that you've worked with. When you click this icon from within an Office program, Office displays only shortcuts appropriate to the program you're using.

NOTE

Don't confuse the Office Recent folder with the Windows system folder of the same name. Office manages a separate Recent folder for each user profile on a system. To manage the Office shortcuts from an Explorer window, enter **`%appdata%\Microsoft\Office\Recent`** in the Run dialog box or in the Address bar of an Explorer window.

TIP FROM

The Recent folder is just one of many Most Recently Used (MRU) lists in Windows. Some people prefer not to keep this list, either for privacy reasons or out of a desire to reduce clutter. You can empty the Recent folder at any time by opening it in Windows Explorer, pressing Ctrl+A to select all files, and then pressing Shift+Delete (use the Shift key to bypass the Recycle Bin and permanently delete the selected shortcuts). To turn off tracking of recently used files in Office, you need to use the Registry Editor (Regedit.exe). This tool is for experts only, so don't attempt this unless you're comfortable poking around in the Registry. Navigate to `HKEY_CURRENT_USER\Software\Microsoft\Office\11.0\Common\Open Find`. Delete the entire Open Find subkey to remove all MRU lists for all Office programs. This change isn't permanent–Office will begin building a new set of MRU lists the next time you use an Office program.

- **Desktop**—Opens or saves files on the Windows desktop. Use the desktop as a holding area when you want to create a file and move it elsewhere using Windows Explorer. Using the desktop as a permanent storage area is generally a bad idea because most Office applications have a tendency to create temporary files in the same location as the file you're working with.
- **My Documents**—Opens the personal data folder for the user currently logged on. As noted earlier in this chapter, Windows enables you to change the target folder that Office opens when you click this icon.
- **My Computer**—Displays icons for local drives and document folders.
- **My Network Places**—Lets you manage files stored in shared folders on your network or on WebDAV-compatible servers.

In Open and Save dialog boxes, Office includes two features that make it easier to find a file by name:

- As you type in the File Name box, the *AutoComplete* feature suggests the first name that matches the characters that you've typed so far. Keep typing, or press Enter to accept the suggestion. Note that the list of files does not scroll as you type.
- If you click in the list of files and then type a character, Office selects the first file that begins with the letter or number that you typed. If you quickly type several characters in rapid succession, the selection moves to the first file that begins with those characters. If you pause for more than a second between characters, this type-ahead feature resets. Note that as you select files in this fashion, Office does not fill in the File Name box.

To adjust the display of files in the Open and Save As dialog boxes, use the Views button. The drop-down arrow lets you choose from a list of views, or you can click the button to cycle through the following icon arrangements:

- Thumbnails, Tiles, Icons, and List views mirror their counterparts in Windows Explorer.

- Details view displays size, file type, and other information, as shown in Figure 3.4; click any heading to sort the list by that category. (If you think that the information in the Type column is useless, we agree.

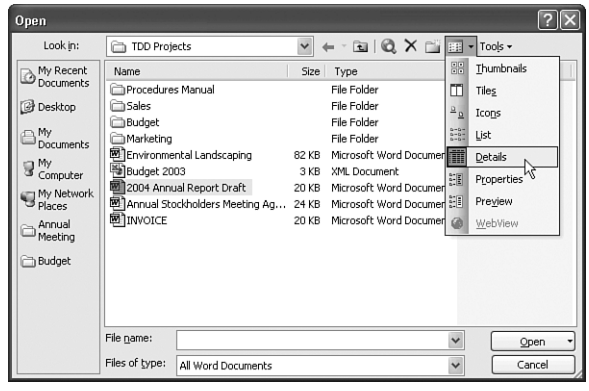

Figure 3.4
Click the Views button to change the arrangement of icons in the Open and Save As dialog boxes.

- Properties displays summary information about the selected document in the right half of the dialog box.
- Preview displays a thumbnail version of the document in the right half of the dialog box as you move from file to file in the list. In general, you should avoid this option because of the performance penalty you pay: As you scroll through a dialog box, the program that you're working with has to open each file; find an import filter, if necessary; and generate the preview. Switch to this view when you want to quickly verify that the file you're about to open is the correct one, and then switch back to List or Details view after peeking at the file.
- WebView uses an HTML template to display files stored in a SharePoint document library. If you don't have a SharePoint server on your network (most people don't) this option is grayed out and unavailable.

Some files, especially certain Excel worksheets, can't be seen in the Preview pane. For suggestions on the possible reasons, see "No Preview in Common Dialog Boxes," in the "Troubleshooting" section at the end of this chapter.

TIP FROM

To manage files in Open and Save As dialog boxes, select the filename and right-click. Shortcut menus here work just as they do in an Explorer window. You can move, copy, delete, or rename a file, for example, as long as the file you select is not currently open.

CUSTOMIZING COMMON DIALOG BOXES

The Places Bar can be customized to make it easier and faster to get to frequently used folders. To add your own folders to the Places Bar, select the icon for the folder that you

want to add, and then choose Tools, Add to "My Places." To remove a custom location from the Places Bar, right-click its icon and choose Remove from the shortcut menu. (You can't rename or delete the five default locations on the Places Bar.)

TIP FROM EQ & Woody

If you add more icons than can be displayed in the Places Bar, small scroll arrows appear at the top and bottom of the list. You can see more icons in the Places Bar if you right-click it and choose Small Icons. Put no more than 15 locations in the Places Bar; with any more, you'll spend too much time scrolling.

To rearrange folders in the Places Bar, right-click an icon that you want to move, and choose Move Up or Move Down.

TIP FROM EQ & Woody

Both the Open and Save As dialog boxes can be resized by clicking and dragging on any of the edges or corners.

Changes you make to the Places Bar apply to all Office programs.

USING ALTERNATIVE FILE FORMATS

By default, Office applications save data files in their own *binary* formats. When you double-click on the saved file, it opens using the program you created the file with. That's the correct choice in most circumstances, but when you share files with friends, neighbors, and co-workers who don't use Office 2003, you might need to open or save a file in a different format.

TIP FROM EQ & Woody

In previous Office versions, *Rich Text Format (RTF)* was often your best choice for saving a file and using it with other programs, especially from software companies other than Microsoft. No more. Nowadays you'll probably find that the easiest way to share data is HTML, which is virtually guaranteed to be readable by any other person on any computer, because they can open it directly in their web browser. (Of course, they won't be able to edit the file, but if your goal is to share information, that shouldn't matter.)

Office includes a wide range of file converters to help translate files into other popular formats, including those for earlier versions of Office. Normally, Office programs open any file created in a compatible format without requiring any extra work on your part. The file that you want to convert might not be visible in the Open dialog box if it ends with an extension that the Office program doesn't recognize. To see all files with extensions normally associated with a given file type, such as WK1 and WKS files for Lotus 1-2-3 spreadsheet files, select the appropriate entry from the Files of Type drop-down list. (If you can't see any

extensions in Explorer windows or dialog boxes, open Windows Explorer and click Tools, Folder Options; in the Folder Options dialog box, click the View tab and clear the Hide File Extensions for Known File Types check box.)

TIP FROM Q&A Woody

To see all files in the Open dialog box, regardless of their extension, choose All Files from the Files of Type drop-down list. Some other distinctions in this drop-down list are less obvious but still useful. For example, selecting Word Documents filters the list to show only files with that file type and the *.doc extension, whereas All Word Documents includes web pages (*.htm) and Word templates (*.dot), as well as ordinary Word documents. Likewise, the All PowerPoint Presentations choice includes any HTML file in addition to PowerPoint presentations and shows.

To save a file in an alternative format, choose File, Save As. In the Save As dialog box, choose an entry from the Save as Type drop-down list.

Office displays the full range of compatible file types in both the Open and Save As dialog boxes. In some cases, you might need to supply the Office CD to install a particular converter before opening or saving a file in that format.

STORING EXTRA DETAILS ABOUT YOUR DOCUMENTS

Windows XP keeps track of a few essential details about each file: its size, when it was created, and when you last modified it, for example. You can see all these standard details when you open Windows Explorer. So what happens when you save a document using an Office program? You get the option to store extra details called *properties*; these include the author's name, a title and a subject for the file, and comments or keywords that you can use to search for documents later. If you're an obsessive organizer, you can open a Custom properties sheet for any document and keep track of more than two dozen built-in categories or add your own.

Some properties are filled in automatically by Office, but to really take advantage of this feature you need to go a little bit out of your way and fill in extra details for every document you work with. Why should you bother?

- **It helps you find stuff later**—When you use the Advanced File Search task pane in Office or a third-party search tool, you can search for any property of any Office file. If you've trained an entire department to enter details about a client, project, or product line in the Properties dialog box (or if you've automated this process with macros), it's trivially easy to locate all the files associated with that activity.
- **It helps you keep projects organized**—In Windows Explorer's Details view, you can add columns for many Office file properties. For example, in a folder filled with Word documents, right-click any column heading to display a list of available columns, and then click Title and Author to add those fields to the display. That way, you can scan through a list and see more than just the file name.

- **It lets you reuse data**—You can look up file properties in any document and then use those values in fields and in macros that you create by using Visual Basic for Applications. Using fields, you can automatically fill in data within a document based on the values you enter in the properties dialog box. You can also create AutoNew macros that prompt you for key information every time you create a new document based on a particular Word template. You can then use that information to file the document when you save it.

➔ For more ideas and techniques using VBA, **see** Chapter 26, "Using Macros to Automate Office Tasks," **p. 801**.

To view and edit the properties of a file currently open in an Office program, choose File, Properties. The dialog box that appears resembles the one in Figure 3.5.

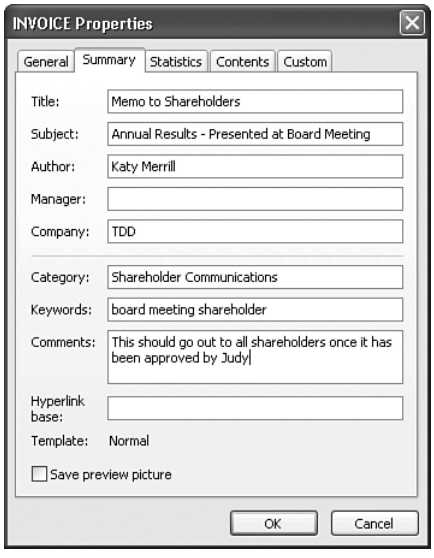

Figure 3.5
The Properties dialog box displays summary information about Office file types.

The Properties dialog box for an Office file includes the five tabs described in Table 3.1.

TABLE 3.1 OFFICE FILE PROPERTIES

Properties	Description
General	Basic information from the Windows file system: name, location, size, and so on.
Summary	Information about the current file and its author, including fields for company name, category, and keywords. The Comments field is particularly useful because the comment text appears in the status bar at the bottom of any Windows Explorer window when you select the saved file. It also appears in the ScreenTips that appear when you hover the mouse pointer over a file name in Windows Explorer.

continues

TABLE 3.1 CONTINUED

Properties	Description
Statistics	Details about the size and structure of the file, such as the number of words in a document or the number of slides in a presentation; also displays revision statistics and total editing time. This tab is not visible when inspecting file properties from within Windows Explorer; instead, the information is displayed on the Advanced view of the Summary tab. This information is frequently incorrect, especially when you inspect it from within an Explorer window. If you rely on these statistics to stay within a specific word count when working on a homework assignment, always nspect them from within the document itself to guarantee that the information is up to date.
Contents	The parts of the file, such as the outline of a Word document, based on heading styles; worksheet titles in an Excel workbook; or slide titles in a PowerPoint presentation. This tab is not visible when inspecting file properties from within Windows Explorer.
Custom	Twenty-seven built-in fields that are useful when creating business documents, including Client, Document Number, and Date Completed. In addition, you can enter a field of your own creation, such as the name of a class or a teacher. Custom fields can contain text, dates, numbers, or Yes/No information; they can also be linked to Word bookmarks, named Excel ranges, or PowerPoint text selections.

NOTE

You can inspect most Office file properties by right-clicking a filename in Windows Explorer and choosing Properties from the shortcut menu. Information in this dialog box is arranged differently from what you see within an Office program, and many properties are not available when the file is open for editing.

For simple projects, you might choose to ignore file properties and just give each document a descriptive filename that tells you everything you need to know about the file. For more complicated documents, however, adding file details—including keywords and categories—can help you quickly find a group of related data files, even months or years after you last worked with them. Use the Comments box to add freeform notes about a given file.

To enter additional details about an Office file, you must open the Properties dialog box, fill in the appropriate fields, and then save the file. If you use this feature regularly, you can configure Word, Excel, and PowerPoint to display the File Properties dialog box every time you save a file.

➔ To learn more about the common features found within the Office applications, **see** "Configuring Common Office Features," **p. 47**.

DEFAULT DOCUMENT PROPERTIES

If you just click the Save button without entering any additional data, Office programs save only a few document properties along with the saved file. Windows stores the standard file details, of course, including the name and size of the file as well as the date and time the file was modified. All Office programs add your name and your organization's name (using whatever name the program finds on the User Information tab of the Options dialog box) in the Author and Company fields, respectively. Word and PowerPoint fill in the Title field as well, using the first few words of a Word document or the title of a PowerPoint presentation.

CAUTION

> In Word documents in particular, this capability can lead to embarrassing consequences if you're not careful. By default, if you don't take any special steps to enter document properties, Word picks up the opening line of your document and plops it in the Title field—up to the first paragraph mark or 126 characters, whichever comes first. If you begin composing an angry letter and save the file as a draft, Word fills in your initial angry words in the Title field. Those angry words might remain in the Title field even if you calm down and delete them from the final version of the document. That fact alone is an excellent reason to configure Word to pop up the Properties dialog box whenever you save a new document.

If you want to add categories, keywords, or comments to any Office file, do so on the Summary tab.

USING CUSTOM PROPERTIES TO ORGANIZE FILES

Custom properties make it easier to keep track of files in an office environment where many people create and share files. In a legal office, for example, you might use the Client, Status, and Recorded Date fields to track the progress of Word documents. Members of a team producing budget worksheets might use the Checked By and Forward To fields as part of a document management system. Use the Office applications' Search task panes to find files whose properties match a particular set of criteria. Figure 3.6 shows a Word document that includes several custom properties.

To enter custom criteria for any Office file, follow these steps:

1. Open the file and choose File, Properties.
2. Click the Custom tab to display the dialog box shown previously in Figure 3.6.
3. Choose a field from the Name list. To create a new field, type its name here.
4. Choose one of the available data types from the Type drop-down list.
5. Type the data for the selected field in the Value text box.

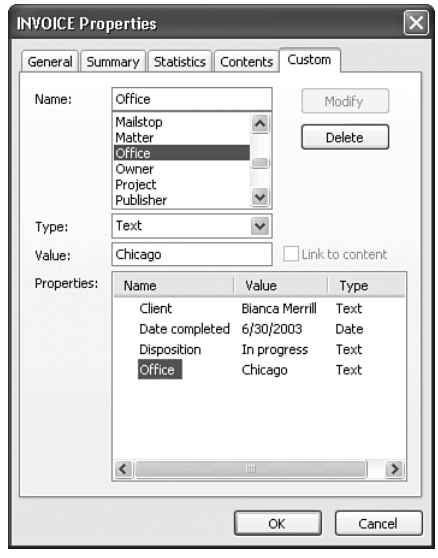

Figure 3.6
Record additional file properties on the Custom tab; later, use the Find tool in Office common dialog boxes to search for files that match these criteria.

CAUTION

If you specify Number or Date as the data type for a custom field, you must enter the value in a matching format. If you enter dates in a nonstandard format or you include text in a field that should contain only numbers, Office enters the value as text.

6. Click Add. The new entry appears in the Properties list at the bottom of the dialog box.
7. Repeat steps 3–6 for any additional custom fields. To remove an item from the Properties list, select its entry and click Delete. Click OK to close the dialog box and return to the program window.

The Link to Content check box is grayed out and unavailable unless you're working with a Word document that contains bookmarks, an Excel workbook that contains named ranges, or a PowerPoint presentation containing linked text. In any of those cases, you can enter a custom field name, select the Link to Content check box, and then choose the bookmark or named range. In a PowerPoint presentation, you must select the text you want to link to a custom field before opening the Properties dialog box.

USING WINDOWS EXPLORER TO VIEW FILE PROPERTIES

To view any Office file's properties without opening the file itself, open a Windows Explorer window, right-click the file's icon, and then choose Properties. In most Windows versions, you can edit most file properties for Word documents, Excel workbooks, Publisher publications, and PowerPoint presentations directly from an Explorer window. Regardless of which Windows version you use, only the most basic summary information is available when you view the properties of an Access database from an Explorer window.

In Windows XP, you can see some Office file properties, such as the author's name, in the info pane along the left side of a Windows Explorer window, as shown in Figure 3.7. You can also see a thumbnail of the file itself in this region, but only if you selected the Save Preview Picture check box on the Summary tab of the Properties dialog box. By default, this check box is cleared for Word documents and Excel workbooks and is selected for PowerPoint presentations.

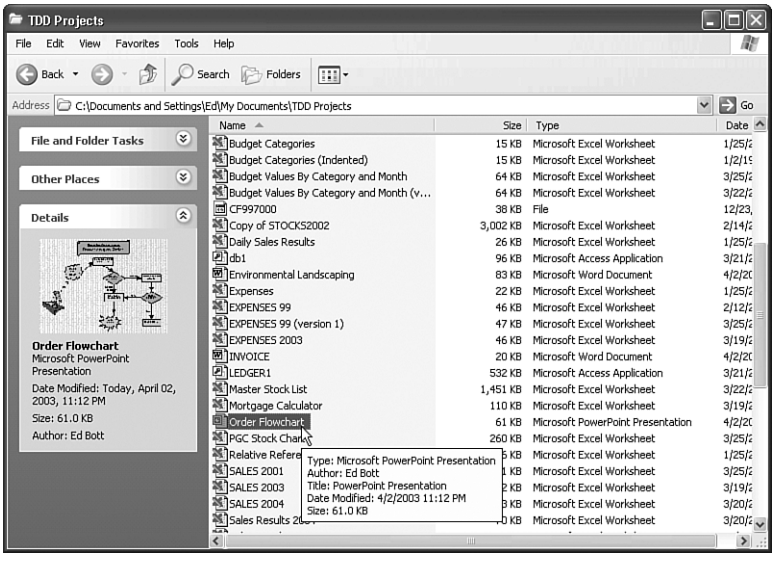

Figure 3.7
In Windows XP, you can view some information drawn from an Office file's properties from within Windows Explorer. The thumbnail preview is available only if you check an option when saving the file.

To save a preview of an Excel workbook, you must check this box when you first save the file; see "No Preview in Common Dialog Boxes" in the "Troubleshooting" section at the end of this chapter for more details.

SEARCHING FOR OFFICE FILES

The Open dialog box displays a list of all files and subfolders in a single folder. Searching for a specific file can be tedious if the folder is full of files with similar names, or if it's organized into many subfolders. So how do you find the exact file you're looking for? From any Office program, you can open the Search task pane, which enables you to search for files, Outlook items, or web pages by using almost any criteria. If you can remember a few scraps of information about the file—part of the name, a date, or even a word or phrase that you remember using in the document—you can probably find it.

NOTE

The Office search tools are capable, but if you have lots of documents on your computer, you'll get better results from a desktop search tool that integrates directly with Windows XP. For details, see "Extra Credit: Find Files Faster with Desktop Search Tools" at the end of this chapter.

For example, you might look in your homework folder for all files that you created or updated in the past week. You might search for files that include the word *report* and that are not marked as completed. If you're trying to clean out clutter in your My Documents folder, you can search for all Office files that were last modified more than six months ago, and then burn them to a CD or move them to an archive folder.

In Office 2003, the file search tools are tightly integrated into Office programs. To display the Basic File Search task pane (see Figure 3.8), choose File, File Search.

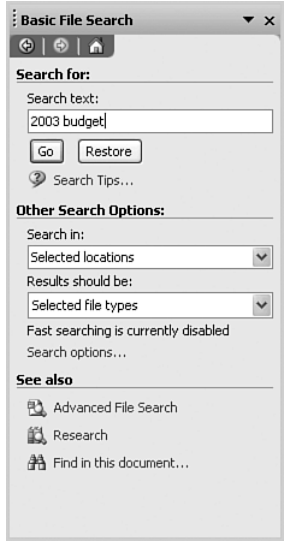

Figure 3.8
Search for a file or Outlook message by using simple search criteria in the Basic File Search task pane.

CAUTION

Office 2003 does *not* allow you to save and reuse search criteria. You can bring back the most recently used Search by clicking the Restore button, but there is no capability to store searches within Office programs. For that task, you'll have better results using a desktop search utility that allows you to save shortcuts.

Basic searches are quick and simple. Enter your search text, select the locations you want to search, choose what file types you want the search to return, and then click Go to begin the search. Basic searches follow these rules:

- The search looks for any files that contain the search text, whether that text appears in the body of the file, in keywords, or in file properties.
- Search results also include files that contain forms of the words you entered as search text, such as plurals or alternate verb forms (*paying* or *paid* instead of *pay*, for example).
- You can use wildcards in basic searches. An asterisk (*) substitutes for a group of characters, whereas a question mark (?) fills in for a single character.

- You'll have better results when searching the My Network Places option if you specify only the network locations you want to search. Many network locations do not support searches, and others allow searches only in document libraries.
- When searching Outlook messages, you can use natural language rather than keywords, entering a phrase such as *show me all messages received this week*.

Advanced searches, on the other hand, can be complex, with sophisticated logic and multiple criteria. To make the switch, click the Advanced File Search link at the bottom of the Basic File Search task pane. Figure 3.9 shows a typical advanced search.

Figure 3.9
Be careful when using AND/OR logic in the Advanced File Search task pane. The correct order affects your search results.

You construct a search by adding criteria to a list. Each entry in the criteria list consists of three pieces:

- **Property**—Includes file system properties (name, date created, and file size, for example), statistics (such as the number of slides in a PowerPoint presentation or the number of paragraphs in a Word document), and Office custom properties.
- **Condition**—Defines the comparison that you want Office to make. The list of available conditions depends on the property you selected previously.
- **Value**—Defines the specific text, number, or other data type for which you want Office to search.

A pair of buttons (And, Or) at the left of the criteria definition boxes enable you to combine criteria, and you can specify that Office search multiple folders and subfolders.

Criteria can be extremely simple—for example, all files last modified this week. For more sophisticated searches, combine criteria to quickly filter a huge group of files into a manageable list. After you enter the first set of conditions, click the Add button. After you've entered all your search criteria, click the Search button. Options at the bottom of the pane let you restrict file types and locations using check boxes.

To improve the performance of searches on your local computer, especially those that have to chug through folders filled with large numbers of documents, you'll need to enable the Windows Indexing Service, which is referred to in the Basic and Advanced File Search panes. Don't confuse this feature with the old, much-despised FindFast feature from past Office versions. The Indexing Service is a Windows feature that also benefits other programs and runs only when the system is idle. Although you might see some performance degradation on computers with low system resources (in particular, those with 128MB or less of RAM), in practice the effect should be unnoticeable.

To turn on the Indexing Service, open the Basic File Search task pane, click the Search Options link, and select the option to enable the Indexing Service.

FINDING FILES OR MESSAGES BY CONTENT

To conduct a simple search by content—whether you're looking for a file, a message, a contact, an appointment, a task, a note, or a web page—bring up the Basic Search task pane and follow these steps:

1. Type the text (content) that you're looking for in the Search Text box. You can use wildcards: ? stands for any single character (m?t searches for *met* or *mat*, but not *meet*); * stands for one or more characters (b*nk searches for *bank* and *blank* but not *band*).
2. In the Search In list, specify where you want Office to look. You can narrow the search to specific drives or folders in My Computer or Outlook; you can also limit the search to specific locations in My Network Places.
3. In the Results Should Be box, specify which types of Office files and Outlook items to look for; you can also search in web pages.
4. Click the Go button. The matching items appear in a list. If you click once on a filename, the appropriate Office application opens the file. You can also choose from a drop-down list to the right of the filename if you want to create a new file based on the selected one.

USING DOCUMENT PROPERTIES TO LOCATE FILES

Use the Advanced File Search task pane in conjunction with file properties to construct a powerful document-management system. It takes training and discipline for a group of workers to routinely enter the correct information in file properties. You can automatically add some of these details by customizing templates or using Visual Basic for Applications. For example, you might use simple AutoNew, AutoOpen, and AutoClose macros, which run automatically when you open or close a document, to prompt the user to enter specific details about a document.

All built-in file properties are available from the Property drop-down list in the Advanced File Search task pane. To search for properties that you've added to the Custom tab, you need to manually enter the name of the property.

WORKING WITH MULTIPLE FILES

In Word, Excel, and PowerPoint, you can open and view or edit more than one file at a time. To open multiple files using the common dialog boxes, follow these steps:

1. Choose File, Open (or press Ctrl+O) to display the Open dialog box.
2. Hold down the Ctrl key and click to select multiple filenames.
3. Click the Open button or press Enter to open all selected files.

To open multiple files from an Explorer window, hold down the Ctrl key and click each icon; then right-click and choose Open.

You can also open any file by dragging its icon from an Explorer window into an Office program window. When you drag an Excel or PowerPoint icon from an Explorer window into an open program window, Office opens the new file in its own window. On the other hand, if you drop a Word icon into an open document window, Word assumes that you want to insert the file at the point where you dropped it. To open the document in a new window instead, drop the icon onto the title bar of the Word program window.

Each data file gets its own button on the Windows taskbar, and you can switch between document windows the same way you switch between programs.

Unfortunately, the techniques for handling multiple document windows are inconsistent among Office programs, which can cause you no end of confusion. Unless you change its default behavior (see the following tip), each Word document exists in its own window; there's no way to display two or more Word documents in the same window, and closing one Word document has no effect on other windows. Using Excel and PowerPoint, on the other hand, you can rearrange two or more document windows within a single program window, and if you click the Close (X) button on an Excel or PowerPoint window, you close all open workbooks or presentations.

TIP FROM

EQ & Woody

You can have Word put multiple documents inside its window like the other Office applications do (the so-called *multiple document interface*, or MDI). With Word in this condition, you can, for example, choose Window, Arrange All to have multiple documents appear inside Word without multiple copies of the menus and toolbars hanging around cluttering up the screen. To do so, choose Tools, Options; on the View tab, clear the Windows in Taskbar check box. Unfortunately, when you do this, individual documents no longer appear in the Windows taskbar.

SETTING UP AUTOMATIC BACKUP AND RECOVERY OPTIONS

No roller coaster can compete with the sinking feeling you get when an Office program hangs, crashes, or simply disappears. With most programs, you can kiss your unsaved work goodbye. But Office 2003 comes with "air bags" designed to make crashes less frequent, to make them less devastating when they do occur, and to increase your chances of recovering a document when Office does crash. These are the important points to keep in mind:

- If an Office application "hangs"—goes out to lunch and doesn't come back—you should shut it down using the Office Application Recovery program. Click Start and open the All Programs menu; then click Microsoft Office, Microsoft Office Tools, and choose Microsoft Office Application Recovery. (Figure 3.10 shows this utility in action.) Avoid using Task Manager or the other Windows tools—Office is one of the few Windows programs that ships with tools specifically designed to dislodge a "hang."

Figure 3.10
If an Office program quits responding, try to use the Application Recovery utility to recover your work.

- When you restart an Office program that has crashed, chances are good that you'll be presented with the Office Document Recovery task pane (see Figure 3.11). Documents that are listed as [Original] probably aren't as up-to-date as those marked [Recovered]. Choose the version that you want to keep, click it, and then Close the Document Recovery task pane.
- It might be worthwhile to save several [Recovered] documents and compare the versions to see which (if any) have worthwhile changes. To do so, click the down arrow to the right of the [Recovered] filename and choose Save As.

TIP FROM

Automatic Backup and Recovery–the "air bags for Office"–isn't foolproof. Sometimes it works; sometimes it doesn't. It's definitely not a substitute for saving your work regularly and keeping backup copies in a safe place. For projects that are especially important, burn your backups to a CD or copy them to a USB flash drive for extra protection.

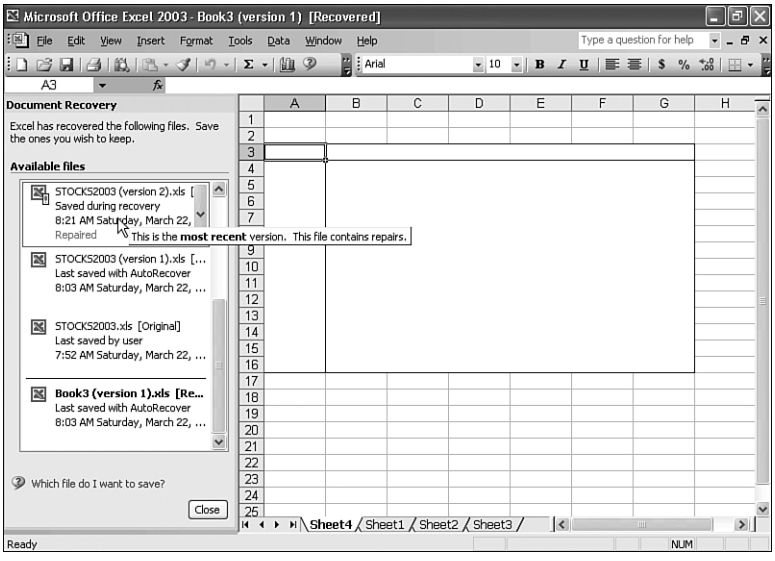

Figure 3.11
Office's Document Recovery task pane appears on the left side of the screen.

In some cases, the recovery procedure will actually repair damage to a file when reopening it. In this case, you can use the drop-down menu to open a dialog box that shows you which repairs were made.

TROUBLESHOOTING

PUTTING TEMPLATES IN THEIR PLACE

I created a group of templates and saved them along with the standard Office templates in the `%programfiles%\Microsoft Office\Templates\1033` *folder. But when I choose File, New, none of my custom templates are visible.*

Microsoft designed the folder that stores system templates so that users cannot add templates to it. Instead, you should save your templates to the default User Templates location. The safest way to save templates to this location is one at a time. If you choose Template from the Files of Type list in the Save As dialog box, all Office programs will save your work to the correct location. If you want to add a large number of files to this location, open Word and choose Tools, Options; then click the File Locations tab and verify the User Templates location.

NO PREVIEW IN COMMON DIALOG BOXES

I selected Preview from the drop-down menu of views in an Office common dialog box, but when I click a file in the pane on the left, Windows displays the words `Preview not available` *instead of showing my file.*

The preview pane shows a static snapshot of the document as it existed the last time you saved it. By default, this option is not selected because it tends to add roughly 60KB to every

file that you create. To make this preview picture available, you must choose File, Properties and check the Save Preview Picture box on the Summary tab. You can do this at any time with a Word document or PowerPoint presentation. However, this option is effective with Excel workbooks only if you use it when you first create the file. Checking this box on an Excel workbook after you've saved it with this option off has no effect at all. To enable the preview, select the Save Preview Picture check box and save the file under a new name. Then close the file and use Windows Explorer to delete the old version and rename the new one with the old name.

EXTRA CREDIT: FIND FILES FASTER WITH DESKTOP SEARCH TOOLS

You don't need to open an Office program to find a missing document. Desktop search utilities index the entire contents of your hard drive, including e-mail messages, Office documents, music files, digital photos, and just about anything else. By entering a search term or two, you can display all matching documents and quickly zero in on the one you need.

All the leading desktop search utilities have the capability to index, find, and preview files saved in Office formats. Typically, you install a small program, allow it to create an index of your hard disk, and then begin searching. (The index process can take several hours, so don't install one of these programs if you need to find a file right away.)

Our two favorite programs in this category are Copernic Desktop Search (`http://www.copernic.com`) and Windows Desktop Search, which is included with the MSN Search Toolbar (`http://desktop.msn.com/`). Both programs are free, easy to use, and amazingly fast and accurate.