

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? How do you avoid reinventing the wheel when you want to begin a new project? 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, days, or weeks?

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, as well as a rich trove of ready-made templates that others have already created. 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.

For the most part, this chapter is concerned only with the three Office programs that use individual files to store your work: Word, for document files; Excel, for workbooks; and PowerPoint, for presentations. As we explain in Part V, OneNote's storage system doesn't rely on individual files, so it's not relevant in this chapter.

WHERE SHOULD YOU KEEP YOUR FILES?

In Windows Vista and Windows XP, the files you create for your personal use belong in one place: the subfolder set aside for document storage in your personal profile, which is created when you set up your user account. In Windows XP, this folder is called My Documents; in Windows Vista, it's simply called Documents. (And if you don't like either name, you can rename this system folder.) Regardless of the name, 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.

The icon for your Documents folder is never more than two clicks away—it's located at the top of the right column in the Start menu. 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 Documents folder.

TIP

Although most of your files are stored in the 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 (in Windows XP) or the Public folder (in Windows Vista). Files in these folders can be opened by anyone who logs on to the same computer, even if they do so with a different user account. If you've enabled file sharing on your computer, those files can also be accessed over a network.

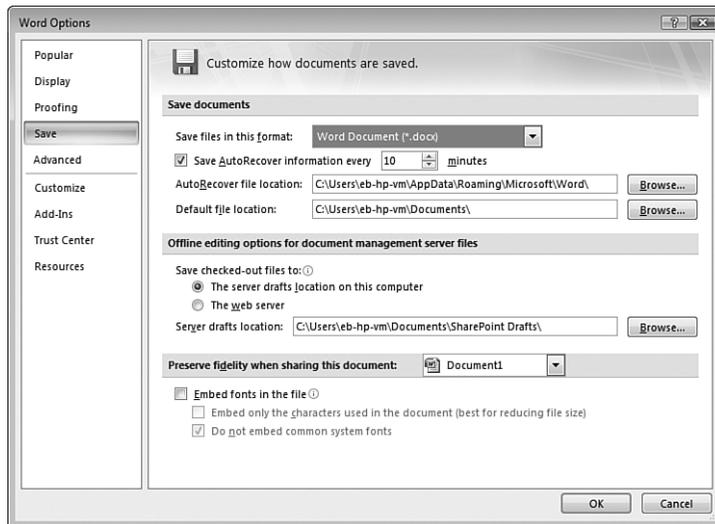
The Documents icon in Windows Explorer windows and on the Start menu is a virtual folder, not an actual physical location. Opening this shortcut opens the folder that's registered as the Documents location for the user who's currently logged on. The exact physical location of the Documents folder varies, depending on which Windows version you have installed and whether it was a clean installation or an upgrade. On most computers running Windows Vista, the Documents folder appears in your *user profile*, normally `C:\Users\<username>\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. Why would you want to reset the default working folder? Maybe your family has a home server where all family members keep documents, music, photos, and other files. In that case, you might want to define your Documents folder on the home server as the default working folder; whenever you choose File, Open or File, Save As, the dialog box displays the contents of this folder. Follow these steps, for example, to adjust the default document folder in Word:

1. Click the Office button, click Word Options, and select Save from the list on the left side of the dialog box, as shown in Figure 3.1.

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



2. Click the Browse button to the right of the Default File Location entry.
3. Browse through drives and folders to select the correct folder and click OK.
4. Click OK to close the Word Options dialog box and save your change.

Follow the same basic procedure for Excel and PowerPoint, clicking the Excel Options and PowerPoint Options buttons, respectively.

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

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.

OPENING AND SAVING FILES OVER A NETWORK

Office 2007 enables you to work with files over a network in much the same way that you access files and folders on a standalone PC. If you are connected to a network at your home or school, you can open and save files in shared folders on the network, provided your user account has been granted the appropriate permission to read or write files. You can browse to shared folders using Windows Explorer or a common dialog box by starting in the Network folder (My Network Places in Windows XP). You can also enter the name of a shared network folder directly using *UNC syntax* (`\\Computer_name\Share_name\`). Unless the network administrator has restricted your rights, you can create and manage your own subfolders in this location.

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

NOTE

On the Save tab in the Options dialog box for each Office program, you'll find options for document management server files. You can safely ignore these settings unless you have your own SharePoint server at hand; most homes and schools don't use this feature, which is found in high-end Windows server operating systems.

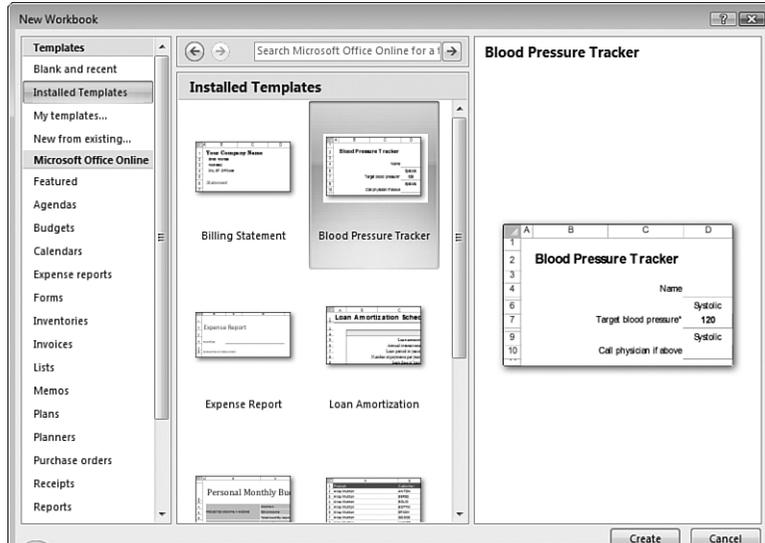
CREATING NEW FILES

When you click the Office button and choose New in an Office 2007 program, the New Document, New Workbook, or New Presentation dialog box opens (the exact name varies depending on the Office program in use). As Figure 3.2 illustrates, these dialog boxes are well organized and fairly self-explanatory.

In each Office program, the New dialog box is divided into three vertical sections. On the left is a category list that allows you to filter the list of available templates, which in turn appear in the center section. The pane on the right shows a full-page preview of the template selected in the center pane. Use the search box above the center pane to find a template that contains the search term in its name or description.

Figure 3.2

Every Office program except OneNote offers a variation of this dialog box, which gives you options for creating a new blank file or one based on a template.

**TIP**

Do you have a large monitor? If so, drag the borders of the New dialog box to make it larger. The list of templates and the preview region on the right remain fixed in width, but the center section, which displays available choices in the category you've selected, gets wider to accommodate more templates. The larger window is especially useful when you choose a category that has a large number of entries, such as those found at Microsoft Office Online.

The choices available in the Templates list are similar in all three file-based Office programs:

- **Blank and Recent**—The Blank Document/Workbook Presentation option creates a new file using the default template for that program. This category also includes the last few templates you've used when creating new documents in that program, on the theory that you might want to create another one just like the previous one.

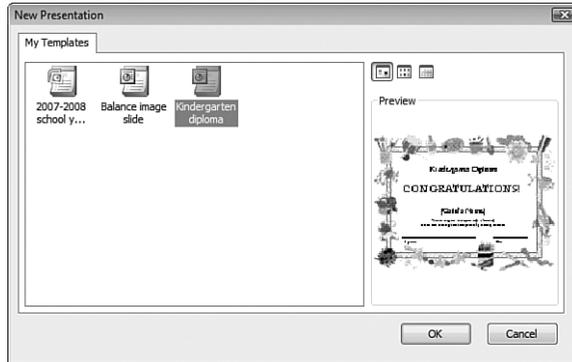
TIP

Although the name of this option includes the word *blank*, there's no reason that files created using this option have to be completely empty or unformatted. By modifying the default template for each program, you can turn the blank option into one that's at least partially filled.

- **Installed Templates**—This list shows all templates for the current program that are installed on your computer. The templates in this list are stored along with the program files in the Microsoft Office\Templates subfolder and are available to all user accounts on your computer.

- **Installed Themes**—You'll find this option in PowerPoint only; it has the same effect as creating a new blank presentation and then applying a theme from the Design tab.
- **My Templates...**—This option opens a dialog box like the one shown in Figure 3.3. Its contents include all templates you have created and saved or downloaded from Microsoft Office Online. This list of templates is stored in your personal profile and is not shared with other users of your computer.

Figure 3.3
Templates you save or download are stored in your personal profile and are available for use via this dialog box.



- **New From Existing...**—The last choice in the list gives you the option to turn any document into an instant ad hoc template. Browse to the document you want to use as your model and then click Create New. The Office program opens a copy of the selected file without disturbing the original; give it a name and you're ready to get to work.

CREATING AND SAVING YOUR OWN TEMPLATES

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`.

TIP

In the previous paragraph, `%appdata%` refers to an environment variable that uniquely identifies a system folder on a computer running Windows Vista or 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 the Search box at the bottom of the Windows Vista Start menu, 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 `%localappdata%` (which opens files in your personal profile's Local subfolder) 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.



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. Click the Office button and then click Save As.
2. From the Save as Type drop-down list, choose Word Template, Excel Template, or PowerPoint Template. The dialog box displays the contents of the Templates folder in your user profile.

NOTE

If your template includes macros (or if you think you might want to add them later), choose the Macro-Enabled Template option. To create a template that works with older versions of Office, choose the Word/Excel/PowerPoint 97–2003 Template option instead.

3. To add the new template to an existing tab in the New dialog box, click Templates in the Favorite Links list and then click the matching folder. To create a new tab, click the New Folder button and add a folder with the name you want the tab to use. If you don't select a subfolder here, your new template will appear on the My Templates tab in the New dialog box.
4. Type a name for the template and click Save.

TIP

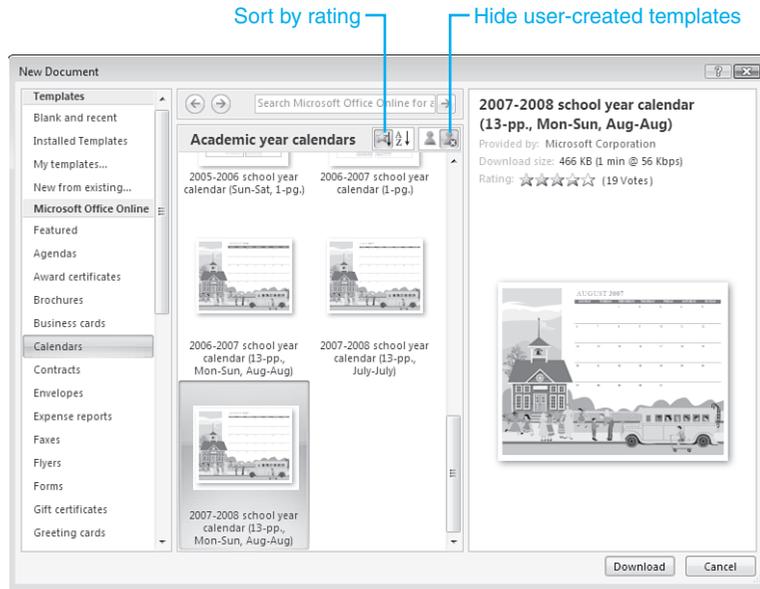
If you want all users on a computer or a network to have access to a set of templates, you need to designate a shared folder as the Workgroup Templates folder and then configure each machine or user account to access that location. You'll find the dialog box with these settings in the Word Options dialog box. Click Advanced, scroll down to the General section, and then click File Locations. From this same dialog box, you can change the location where your personal templates are stored.

DOWNLOADING TEMPLATES FROM OFFICE ONLINE

At the bottom of the Templates list is a long series of categories representing templates available from the Microsoft Office Online website. Because this list draws its content directly from the web, it requires an Internet connection to work properly.

To browse through all available choices in a particular category, click the category name; in some cases, as in the calendars shown in Figure 3.4, you might have to select a subcategory first.

Figure 3.4
The Office Online template collection offers a particularly rich collection of ready-made calendars.



Before you can download and use an Office Online template, you have to go through a validation process that verifies that your copy of Office is not pirated. After you successfully pass the validation test, you can download the template you selected.

The Office Online collection is interesting because it includes templates created by other Office users, not just those from Microsoft. If you'd prefer to hide templates created by other users, click the Hide Customer Submitted Templates button just above the contents pane.

Templates available from Office Online are also rated by users, giving you another option to help you make your selection. The ratings (on a scale of 1 to 5 stars) are displayed in the preview pane for each template. A button above the templates list lets you sort by rating instead of alphabetically.

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 group, 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 the search tools built into Windows and Office 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 101-20071031” 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- or four-letter *extension*, which is added automatically by the application that created the file (such as .docx for files created using the default Word 2007 format). 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 a specific length. 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

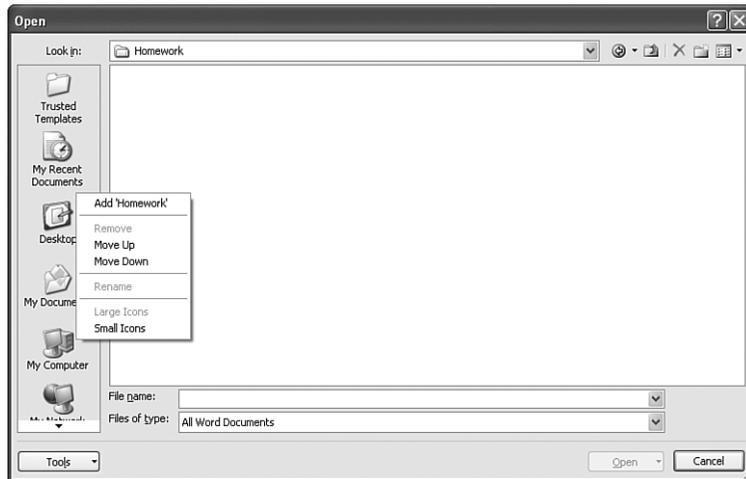
Windows filenames are not case sensitive. Office ignores all distinctions between upper- and lowercase letters when you enter a filename in an Open or Save As dialog box.

USING AND CUSTOMIZING COMMON DIALOG BOXES

Every time you open or save a file in an Office program, you work with one of two common dialog boxes. The exact operation of the Open and Save As dialog boxes varies, depending on which version of Windows you're using:

Common dialog boxes in Windows XP have a series of shortcut icons on the left side, called the Places Bar, which 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. To add a shortcut to the current folder to the Places Bar, right-click any empty space on the bar and choose the option at the top of the menu, as shown in Figure 3.5.

Figure 3.5
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.



The default icons in Windows XP include links to the My Documents folder, to the Templates folder, and to the desktop. There's also a My Recent Documents icon, which contains shortcuts to files and folders with which you've worked. 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

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).

In Windows XP, the Places Bar in Office 2007 programs is different from the one found in common dialog boxes for other Windows programs. In Windows Vista, by contrast, the Open and Save As dialog boxes are identical to those found in other programs. In fact, these common dialog boxes work exactly like Windows Explorer. Instead of a Places Bar, you have a Favorite Links list to the left of the file contents. You can drag the icon for any folder, drive, or network location into this area to make it available for use anywhere in Windows or Office.

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

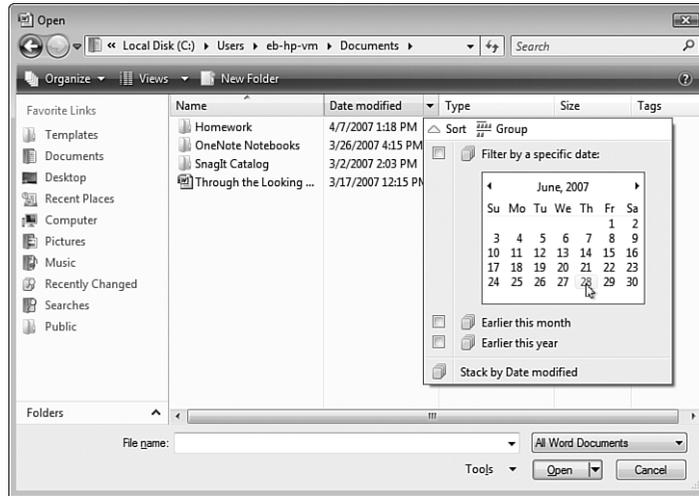
- As you type in the Filename box, the *AutoComplete* feature suggests names that match the characters you've typed so far. Keep typing, or use the down arrow to select an entry from the list, and then press Tab or Enter to accept it.
- If you click in the list of files and then type a character, Office selects the first file that begins with the letter or number 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. As you select files in this fashion in Windows Vista, Office fills in the Filename box for you.

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 different icon arrangements, which match the choices available to you in Windows Explorer:

- In Windows Vista, you can choose Icons view in a wide range of sizes; Windows XP offers a fixed-size Icons view and a Thumbnails view that is equivalent to Large Icons view in Windows Vista.
- Tiles and List views mirror their counterparts in Windows Explorer.

- Details view displays the filename, the date it was last modified, its type, and other information, as shown in Figure 3.6; click any heading to sort the list by that category. Click the down arrow to the right of the column heading to display a drop-down list or date control that you can use to filter or group items.

Figure 3.6
In Details view, you can click any heading to sort by that column, or click the down arrow to filter the list using dates or other criteria.



Three additional choices are accessible in different ways, depending on whether you're running Windows XP or Windows Vista:

- To see summary information about the selected document in Windows Vista, click Organize, Layout, Details Pane, which opens a horizontal pane above the Filename box. In Windows XP, choose Properties from the Views menu and a similar pane appears on the right side of the dialog box.
- To preview the contents of files without opening them, click Organize, Layout, Preview Pane, which 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. To enable this feature in Windows XP, choose Preview from the Views menu.

CAUTION

In general, you should avoid this option on slower computers because of the performance penalty you pay: As you scroll through a dialog box, the program you're working with has to open each file; find an import filter, if necessary; and generate the preview. On a modern, reasonably fast computer, this concern is no longer a pressing issue.

- In the unlikely event you have access to a SharePoint server (most people don't), you can enter its URL (including the http:// prefix) address directly in the Open dialog box to display the contents of the Shared Documents folder. In Windows XP, this switches to a special view (called WebView on the Views menu).

TIP

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.

USING ALTERNATIVE FILE FORMATS

By default, Office applications save data files in their own binary formats. When you double-click the icon for the saved file, it opens using the program with which you created the file. That's the correct choice if you use Office programs exclusively for your own personal productivity. However, when you share files with friends, neighbors, and coworkers who don't use Office 2007, you need to think carefully about how they will deal with the files you create.

The most important issue to consider is that all Office 2007 programs, by default, use new XML-based formats. (You can tell the difference by looking at the filename extension—the new, XML-based format for Word 2007 uses the .docx extension, whereas older files created using the format for older versions of Word use the .doc extension. The same is true of Excel, with .xlsx and .xls extensions, and PowerPoint, which uses the .pptx extension instead of the older .ppt extension.

The new formats have a variety of benefits, including decreased file size and a lower likelihood that you'll encounter data-destroying file corruption. But if you send a file to a friend who is unprepared for it, they'll see an error message when they try to open it.

So what should you do to avoid this sort of problem?

If the people with whom you plan to share files use an earlier version of Office (Office 2000, Office XP, or Office 2003), send them a link to the Microsoft Office Compatibility Pack, <http://office.microsoft.com/en-us/products/HA101686761033.aspx>. After they install this add-in, they can use their older version of Word, Excel, or PowerPoint to open, save, and edit files (with the obvious restriction that any features specific to Office 2007 won't be available for their use).

If your friends don't use Office at all, they can still open the files you send them by downloading and installing *viewer programs* that are compatible with the new formats, and then installing the Office Compatibility Pack. These lightweight programs allow anyone with a computer running Windows XP or Windows Vista to view, but not change, documents created in Office. (Don't be alarmed by the 2003 label on the Word and Excel viewers. The Compatibility Pack takes care of updating these two programs to handle the Open XML formats.) Find the viewers here:

- Word Viewer 2003 (<http://office.microsoft.com/en-us/downloads/CD011197531033.aspx>)
- Excel Viewer 2003 (<http://office.microsoft.com/en-us/downloads/CD011347961033.aspx>)

- PowerPoint Viewer 2007 (<http://office.microsoft.com/en-us/downloads/CD102070641033.aspx>)

Finally, you can head off all potential compatibility formats by saving any file you create in a format other than the Open XML default. To do so, click the Office button and choose Save As. In the Save As Type box, choose an alternate type that you know will work for all your recipients.

TIP

In previous Office versions, Rich Text Format (RTF) was often your best choice for saving a file created in Word 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 to use the Web Page option, which is virtually guaranteed to be readable by any other person on any computer, because he can open it directly in his web browser. (Of course, he won't be able to edit the file, but if your goal is to share information, that shouldn't matter.)

Office includes an assortment of file converters to help open and convert files that were originally saved in 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 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 of a given file type, select the appropriate entry from the File Type drop-down list, which appears just to the right of the Filename box.

TIP

To see all files in the Open dialog box, regardless of their type, 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 *.docx extension, whereas All Word Documents includes web pages (*.htm, *.html, and *.asp), Word templates (*.dot and *.dotx), and Word 97–2003 documents (.doc), as well as Word documents saved in the Open XML format. Likewise, the All PowerPoint Presentations choice includes any web pages in addition to PowerPoint presentations and shows in old and new formats.

STORING EXTRA DETAILS ABOUT YOUR DOCUMENTS

The NTFS file system in Windows Vista and 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 categorized bits of information include the author's name, a

title and a subject for the file, and comments or keywords 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. In addition, if you use Windows Vista, you can store freeform details called *tags*, which you can use for sorting, grouping, and searching any Office file type.

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 with which you work. Why should you bother?

- It helps you find stuff later—When you use the Windows search tools (or those offered by third-party developers), you can search for any property of any Office file. If you've trained yourself to enter details about a project or assignment in the Properties dialog box, 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 filename. (You can do the same with Search results.)
- It lets you reuse data—You can look up file properties in any document and then use those values in fields and in macros. Using fields, you can automatically fill in data within a document based on the values you enter in the Properties dialog box.

→ For more ideas and techniques using VBA, see Chapter 26, "Using Macros to Automate Routine Tasks," p. 721.

To view and edit the properties of a file currently open in an Office program, click the Office button, choose Prepare, and click Properties. This opens the Document Information Panel, which appears below the Ribbon and above the editing window, as shown in Figure 3.7.

The Document Information Panel displays a limited set of properties that are identical for all types of Office documents, including a free-form Comments box where you can enter notes about a file. To see the full list of available properties, click the Document Properties menu in the top-left corner of the panel and choose Advanced Properties. This opens a dialog box like the one shown in Figure 3.8, which organizes information in five tabs.

TIP

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 filename in Windows Explorer.

Figure 3.7
The Document Information Panel displays summary information about the current document.

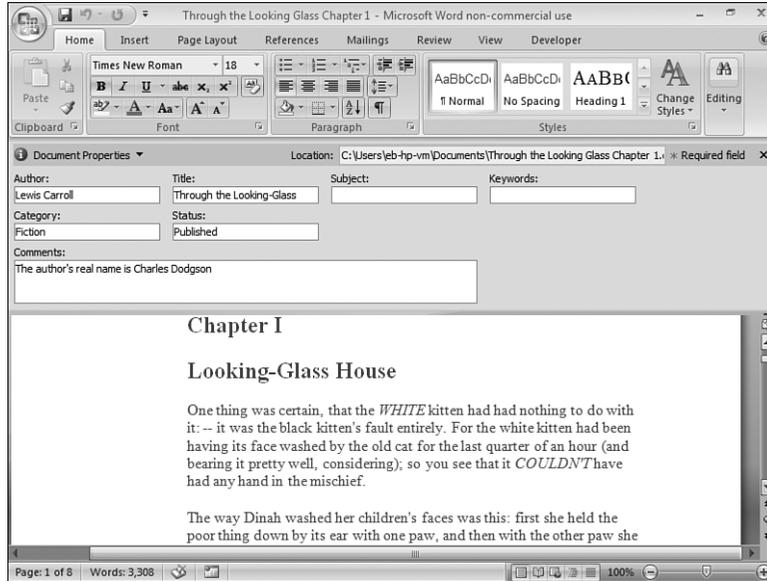
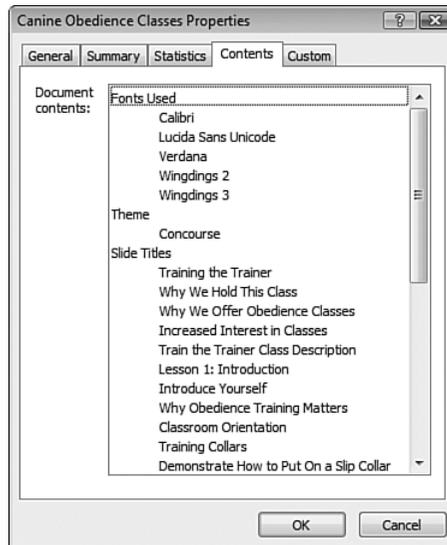


Figure 3.8
Each tab in the Advanced Properties dialog box displays different sorts of information; the Contents tab is the only one that can't be changed directly.



Each of the five tabs contains a different type of information.

- **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 check box at the bottom of this tab allows you to configure Word so it saves a thumbnail of every file of that type.
- **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. If you rely on these statistics to stay within a specific word count when working on a homework assignment, always inspect them from within the document itself, using the Word Count indicator on the Status bar, 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. The only way to change the information shown here is to change the contents of the file itself.
- **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, categories, and free-form comments—can help you quickly find a group of related data files, even months or years after you last worked with them.

To enter additional details about an Office file, you must open the Document Information Panel or the Advanced Properties dialog box, fill in the appropriate fields, and then save the file. To close the Document Information Panel, click the X in its upper-right corner.

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 (using whatever name the program finds on the Popular tab of the Options dialog box) in the Author field. PowerPoint fills in the Title field as well, using the contents of the title slide.

CAUTION

In previous versions of Word, the opening line of your document automatically appeared in the Title field as soon as you saved the document for the first time, leading to potentially embarrassing revelations if your initial draft started with language that you deleted from the final document. That's changed in Word, but not in PowerPoint. If you change the title of a presentation on the title slide, the Title property remains as it was when you first saved the presentation. The moral? It's always a good idea to check saved properties before you share a document with anyone else.

USING CUSTOM PROPERTIES TO ORGANIZE FILES

Custom properties make it easier to keep track of files in an environment where many people create and share files on a shared source such as a file server. Most of the ready-made fields here are designed for use in an office, where you might use the Client, Status, and Recorded Date fields to track the progress of Word documents. But you can also add your own fields to keep track of specific information you find useful. Figure 3.9 shows a Word document that includes several custom properties.

Figure 3.9
Record additional file properties on the Custom tab; later, use Search tools to find files containing these details.



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

1. Click the Office button, choose Prepare, and click Properties.
2. Click Document Information, Advanced Properties; click the Custom tab to display the dialog box shown previously in Figure 3.9.
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.

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

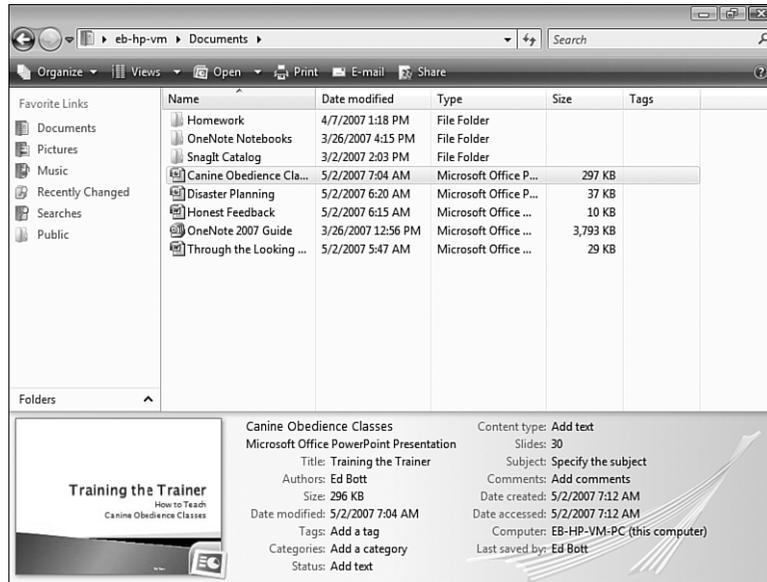
To view any Office file's properties without opening the file itself, open a Windows Explorer window, right-click the file's icon, and then choose Properties. In Windows XP and Windows Vista, you can edit some file properties for Word documents, Excel workbooks, and PowerPoint presentations directly 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. In Windows Vista, this information appears in the details pane at the bottom of the window, as shown in Figure 3.10.

You can also see a thumbnail of the file itself in this region. The thumbnail appears for PowerPoint presentations only if you select the Save Preview Picture check box on the Summary tab of the Advanced Properties dialog box. For Word documents and Excel workbooks, this check box turns on thumbnails as a global option. After choosing the Save Thumbnails for All Word Documents (or Excel Workbooks) option, a thumbnail is automatically created when you save a file.

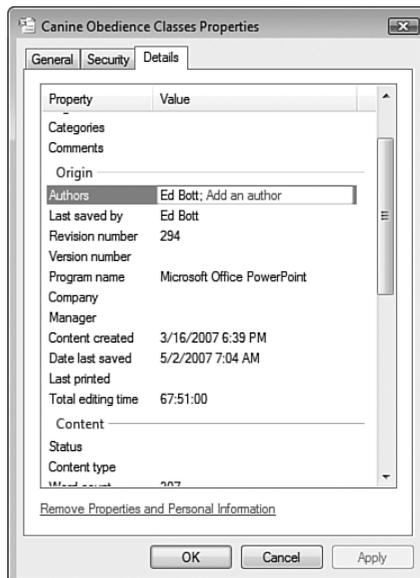
In the details pane of Windows Explorer, you can edit properties directly without opening the file. To increase or decrease the number of properties available in this pane, drag the horizontal divider between the contents pane and the details pane.

Figure 3.10
In Windows Vista, information drawn from an Office file's properties appears in the details pane at the bottom of a Windows Explorer window when the file is selected.



In Windows Vista, you can right-click the icon for an Office file in Windows Explorer and choose Properties. This view consolidates all Office-specific properties onto a single Details tab. If the file is not open in the Office program that created it, you can fill in or change some of these properties directly. Click in the area to the right of the property you want to change as in Figure 3.11 and enter the information.

Figure 3.11
Some properties of an Office file are editable directly from this Properties dialog box.



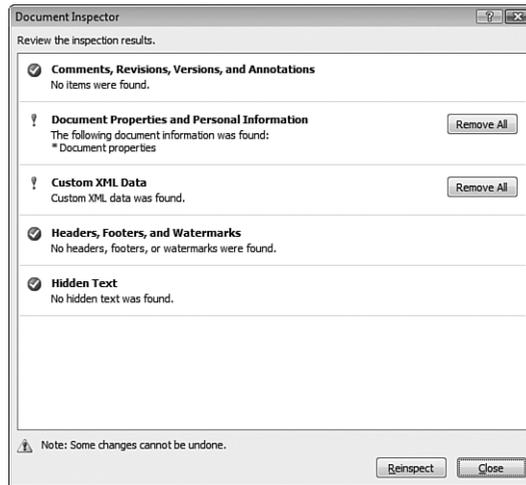
REMOVING PERSONAL INFORMATION FROM OFFICE FILES

Information in saved documents, workbooks, and presentations can sometimes reveal more about you than you like. If you plan to post a document to a public website, you might prefer to have traces of potentially personal information, such as your username, removed. All Office 2007 programs make this task simple. Click the Office button, choose Prepare, and click Inspect Document. Select the Document Properties and Personal Information check box (and any others that you might find useful) and then click Inspect.

If the inspection finds any optional properties saved with the file, you see a report like the one shown in Figure 3.12.

Figure 3.12

If you're concerned about personal information "leaking" out into the world, inspect your documents before publishing them.



To remove all properties, click the Remove All button. To select individual properties for removal or editing, click Close and then open the Document Information Panel.

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. And in some cases you might have no idea where the file you're looking for is stored. So how do you find a file fast?

In Windows Vista, Search tools built into the operating system are available directly from Office common dialog boxes and from Windows Explorer. In Windows XP, similar capabilities are available from the Windows desktop and from Windows Explorer after you install Windows Desktop Search. 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.

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 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 2007 with Windows Vista, the file search tools are tightly integrated into Office programs. In Open and Save As dialog boxes, a Search box appears in the top-right corner of the dialog box. Enter a word or phrase here to find any file that contains that text in the title, body, or in any property. For a more robust set of search tools, start in Windows Explorer, as we explain in the Extra Credit section at the end of this chapter.

Basic searches in a common dialog box are quick and simple. Start in the location you want to search and enter your search text. You don't need to click a button to continue; Windows Vista performs the search on the fly as you type. Basic searches follow these rules:

- The search looks for any files that contain the search text, whether that text appears in the filename, the body of the file, in keywords or tags, 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 (*looked* instead of *looking*, for example).
- The * is supported as a wildcard character. If you type **gla**, for example, you'll find a file that includes the word *glass* or *glamour*. If you type **lass**, however, you get a match only with words that begin with that string. Adding an asterisk at the beginning—***lass**—finds files containing *glass* and *class*.
- You can restrict searches to specific fields using advanced search syntax. For example, to find files where you've filled in the Status field, preface your search text with the field name followed by a colon. The search terms **status:published** and **title:alice** return only items where the exact search term appears in the Status or Title field, respectively, and ignores documents containing those words in the body or in other fields.

In Windows Vista (but not in Windows XP), an arrow appears to the right of the column heading in any common dialog box. (If a particular column isn't available, right-click the list of headings and select from the drop-down list to add it to the display.) Choosing check boxes from this list allows you to filter the list of results to make it easier to find files.

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. Click the Office button and choose Open (or press Ctrl+O) to display the Open dialog box.

2. Hold down the Ctrl key and click to select multiple filenames individually, or select one filename and then hold down Shift and click another filename to select all filenames between those two entries.
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 (choose Arrange All from the Window group on the View tab).

TIP

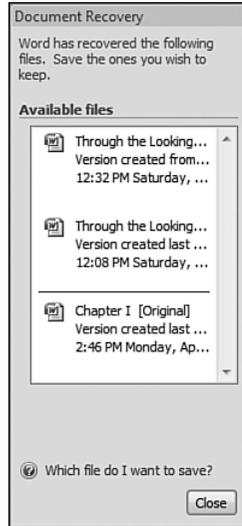
You can have Word put multiple documents inside its window like the other Office applications do (the so-called multiple document interface, or MDI). With Word in this condition, you can, for example, choose Window, Arrange All to have multiple documents appear inside Word without multiple copies of the menus and toolbars hanging around cluttering up the screen. To do so, click the Office button and choose Word Options; click Advanced in the categories list, scroll down to the Display section, and clear the Show All Windows in the 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 2007, like its predecessors, 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.

If an Office program crashes while you're working on an open file, chances are good that you'll be presented with the Office Document Recovery task pane (see Figure 3.13) when you restart the program. Documents that are listed as [Original] probably aren't as up-to-date as those marked [Autosaved].

Figure 3.13
Office's Document Recovery task pane appears on the left side of the screen.



Every item that was automatically saved during Automatic Recovery gets its own entry in the Document Recovery task pane. In some cases, the recovery procedure actually repairs damage caused by file corruption. Click any entry to open it, examine its contents, and decide whether to save or discard it. If you're certain you know what to do with the item, click the arrow to the right of the item and choose whether to save it, view any repairs, or delete it. After you finish reviewing all recovered documents, close the Document Recovery task pane.

NOTE

Office 2003 included a tool called the Microsoft Office Application Recovery program, which you were supposed to remember to run if an Office program stopped responding. Only a tiny percentage of people even knew it existed, and even fewer remembered to use it when it was needed. So, in Office 2007 the document recovery feature runs automatically whenever Office determines that a program has hung up.

It is often worthwhile to save several recovered documents and compare the versions to see which (if any) have changes you want to save. To do so, click the down arrow to the right of the [Autosaved] filename and choose Save As.

TIP

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.

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 users cannot add templates to it. In Windows Vista, in fact, you’ll be prohibited from saving files here by default file permissions. 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.



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 email 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.

Windows Vista includes an exceptionally well-designed and integrated search capability that is available within Office and practically everywhere within Windows. With Windows XP, you’ll need to install a separate program to add this capability. Our two favorite programs in this category are both free and easy to install and use—Copernic Desktop Search (<http://www.copernic.com>) and Windows Desktop Search, which is included with the MSN Search Toolbar (<http://desktop.msn.com/>) and is based on the same program code as the search tools in Windows Vista.

One of the best features of Windows Vista’s integrated Desktop Search is its capability to save searches based on multiple criteria. For example, you can search an entire folder and all its subfolders for Word documents that were saved since the beginning of last week and that contain the word *homework*. After running that search, you save it and then open the Searches folder to rerun it any time. Here’s how:

1. Open your Documents folder in Windows Explorer and type *homework* in the Search box.
2. Click the arrow to the right of the Type heading and select the Microsoft Office Word Document check box. (If you also have documents saved in other Word formats, select those check boxes as well.)
3. Click the arrow to the right of the Date Modified heading and select Earlier This Week and Last Week from the calendar control.

You now have a filtered list that meets all your criteria. As the final step in the process, click the Save Search button on the Windows Explorer Command Bar and give your search a name, such as Recent Homework.

Now, any time you want to retrieve documents that match these criteria, click the Searches shortcut in the Favorite Links pane and then click the shortcut for your saved search.