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File Management

For Beginners

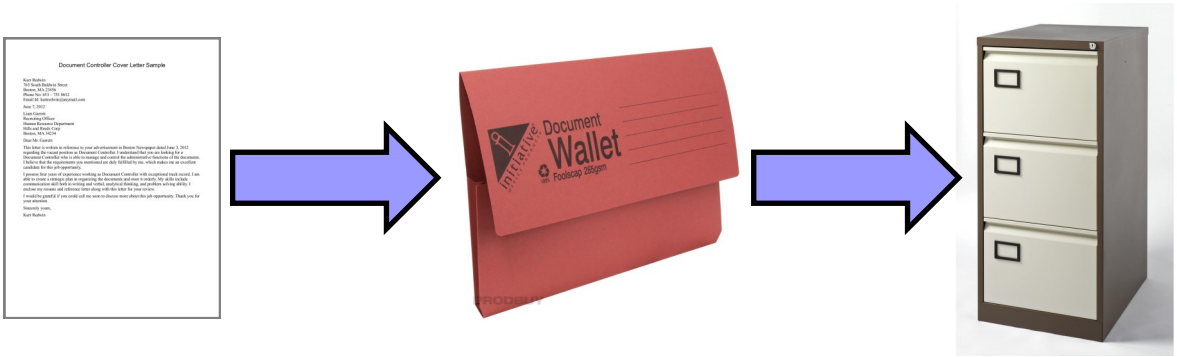
Digital Skills Sessions, by:

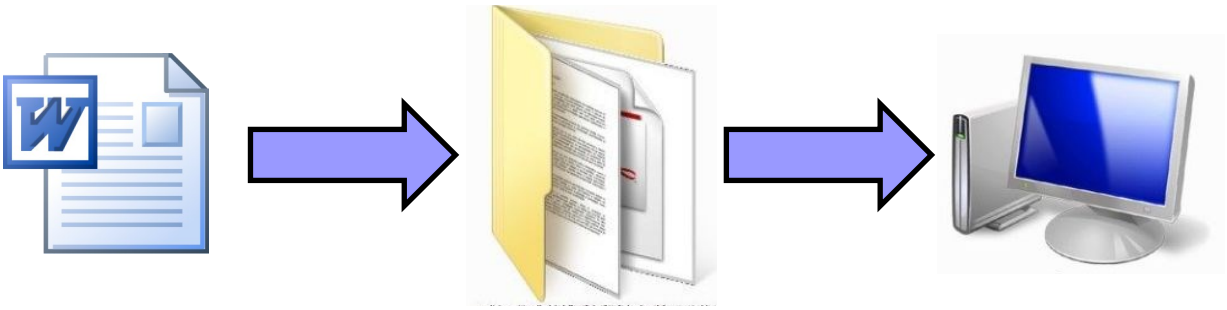
Newcastle Libraries

Newcastle City Council

Introduction

When we talk about file management, it's useful to think of a computer the way we think about a filing cabinet. Like a filing cabinet, your computer is divided into folders where you can put things; and like a filing cabinet, your files and your folders will go exactly where you put them. In fact, when we talk about file management, the only real difference between a filing cabinet and a computer is that a computer deals with *electronic* and not *physical* files.





In this guide we'll teach you the basics of file management. You'll learn how to save files, how to create folders in which to put files and how to move a file. You'll also learn how to delete files you no longer want or need.

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How File Management Works

1. A Word document is a file. An Excel spreadsheet is a file. As far as your computer is concerned, photographs and films and CDs are files. Here are some examples of what files look like when you see them on a computer:

2. When you save a file you save it to a **storage device.** This can either be inside the computer itself (when we save a file on a computer, we're really saving it to what we call the computer's **hard drive**) or on a portable memory stick:

A computer hard drive

A USB memory stick

3. The major difference between the two is that a hard drive is inside the computer and memory sticks are portable—you can plug a memory stick into the **USB** slot on any computer. One smaller difference is that, because they're portable, memory sticks typically have less space on which to save files than computer hard drives.

(Bear in mind that unless you're saving, for example, lots of very high resolution photographs or full-length films, most files you come across will not take up very much space.)

Saving a File

1. One of the most important things to remember is that computers will save files wherever you put them. In other words, **you have to tell the computer where you want to save a file**. If you don't tell the computer where to put a file the computer will choose where to put it.

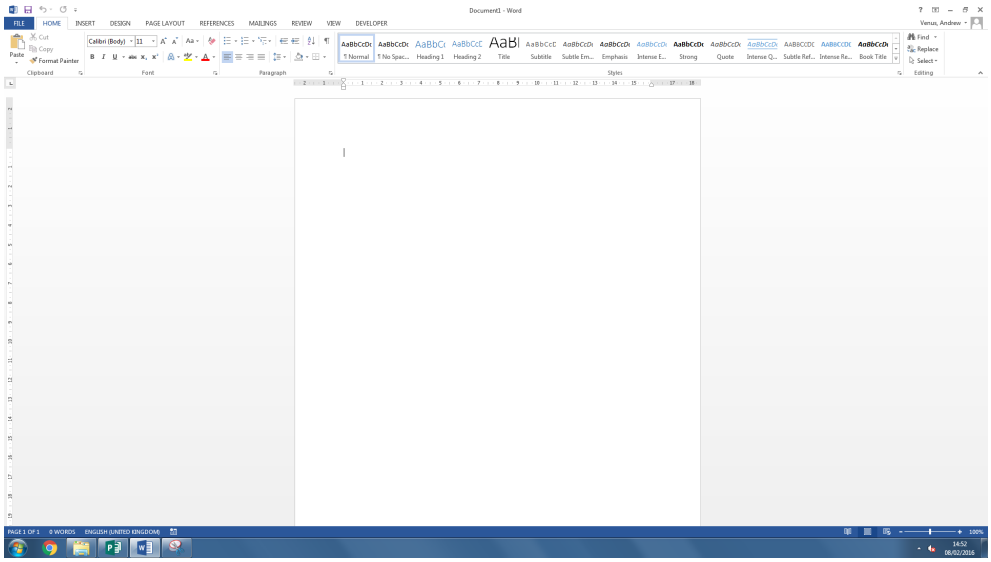
Unfortunately, computers do not have any common sense, which means your file could end up anywhere. It's not impossible to find a lost file, but it can be time-consuming and frustrating; so it's good practice to make sure you keep your files organised.

2. If you bear this in mind, saving a file is fairly easy. To demonstrate, we're going to open Microsoft Word and save a Word document. The first thing to do is open Microsoft Word. Most computers have a Word icon on the desktop or at the bottom of the screen. It will look something like this:

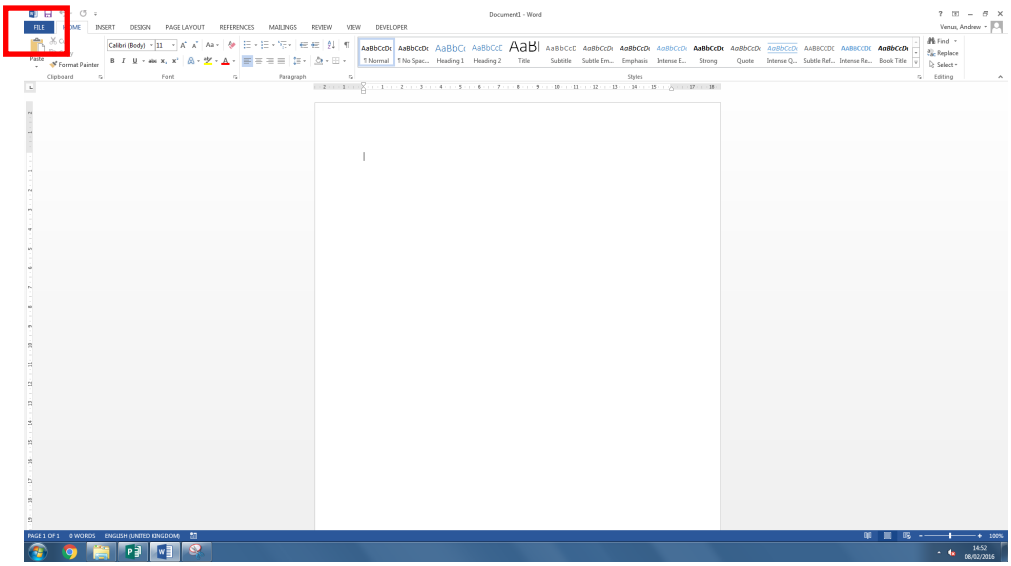
If you can't find the Word icon you might have to search in the **Start** menu, which is the round button in the bottom left corner of the screen. The Start button should look like this:

Saving a File

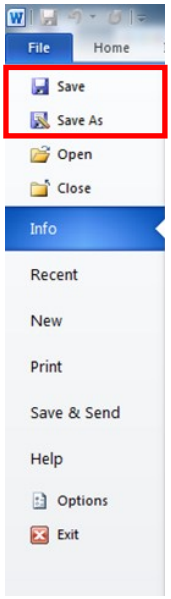
3. Once Word is open you might see a screen asking what type of document you want to use. For this exercise it doesn't matter what you choose (I've chosen a standard blank document). Once you've opened a document you'll have a screen which looks something like this:



4. Now that we've got a new Word document, we're going to practise saving it. First, click the **File** button in the top left of the screen:



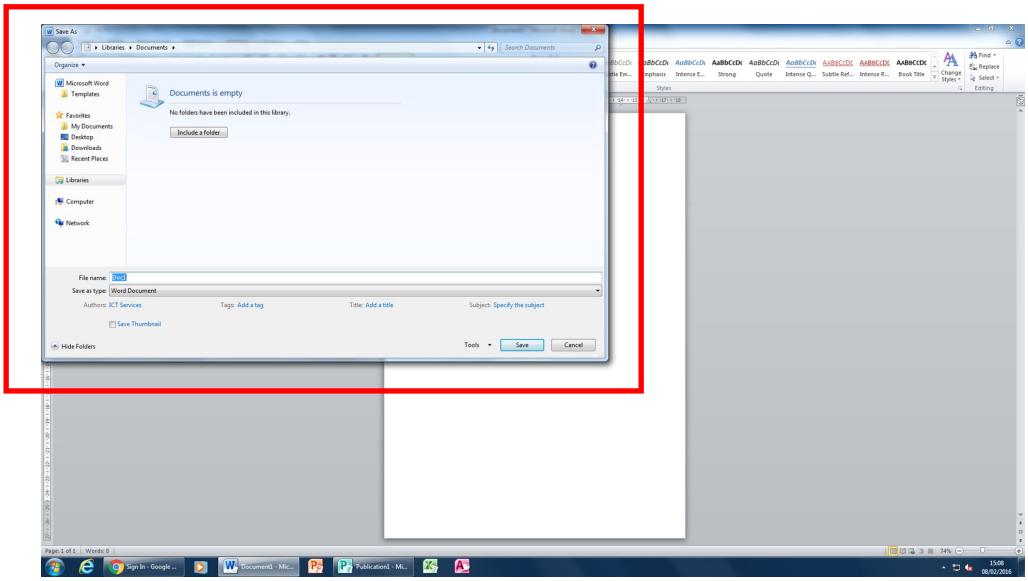
Saving a File



5. The first time you save a document make sure you click **Save As…** and not **Save**. The reason for this is that **Save** tells the computer to save the file *as it currently is*. This means that if you haven't already told Word what to call the file or where to save it, Word will choose a default name and location.

(Of course, the opposite holds true. Once you've saved a file for the first time, you can subsequently use the **Save** option. You don't need to keep using **Save As…** because Word will remember where you saved the file and what you called it.)

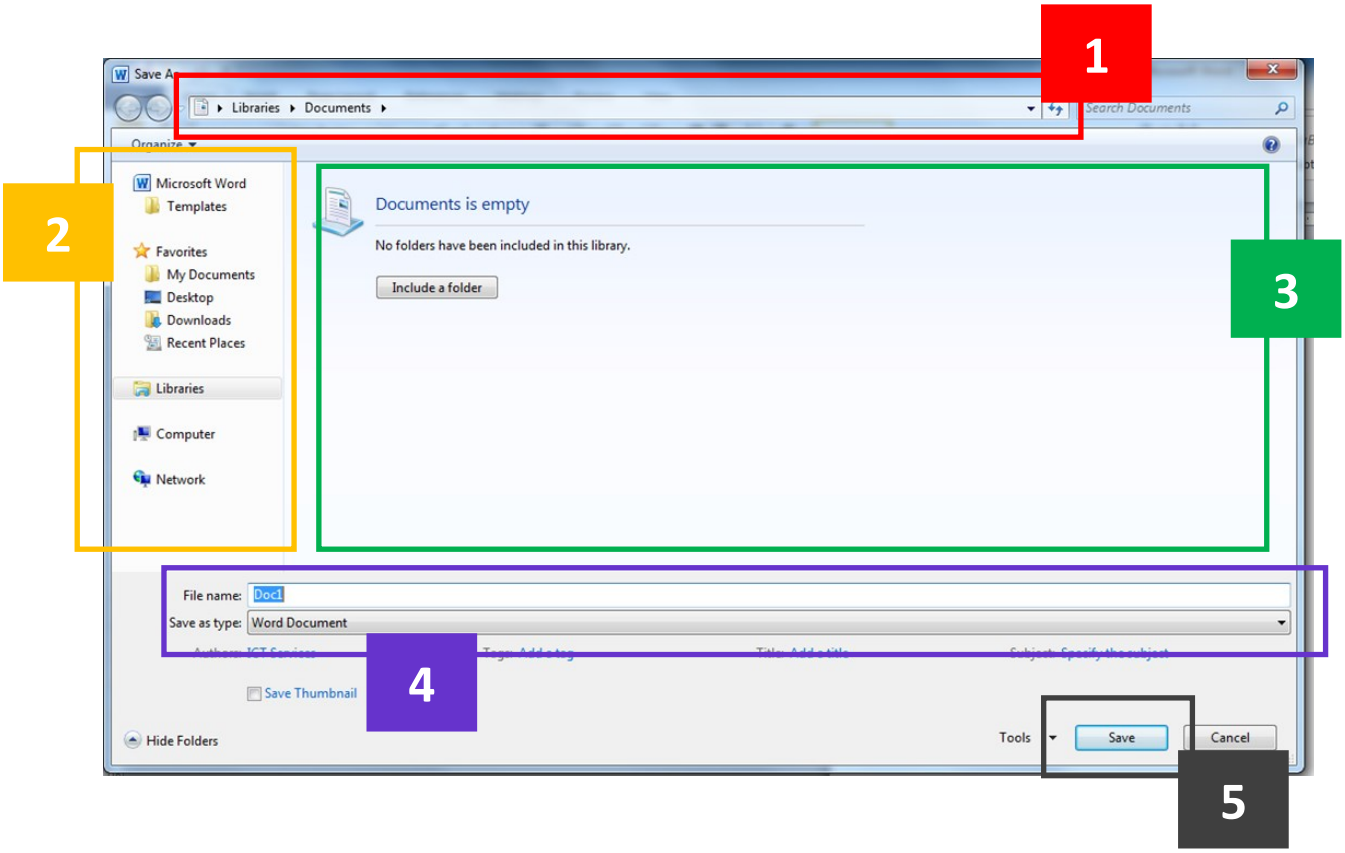
6. You should now see a screen like the one below. The box that appears shows all of the places you can save the document; it is what you use to give the document a name.



(Please note that some computers are slightly different. If you're using a computer at home, you might find that things aren't shown the way they're shown here. This could be because of the computer you're using, or you might have a different version of Word. The important thing to remember is that these differences are typically cosmetic; by playing around you'll find that in essence everything works the same way.)

Saving a File

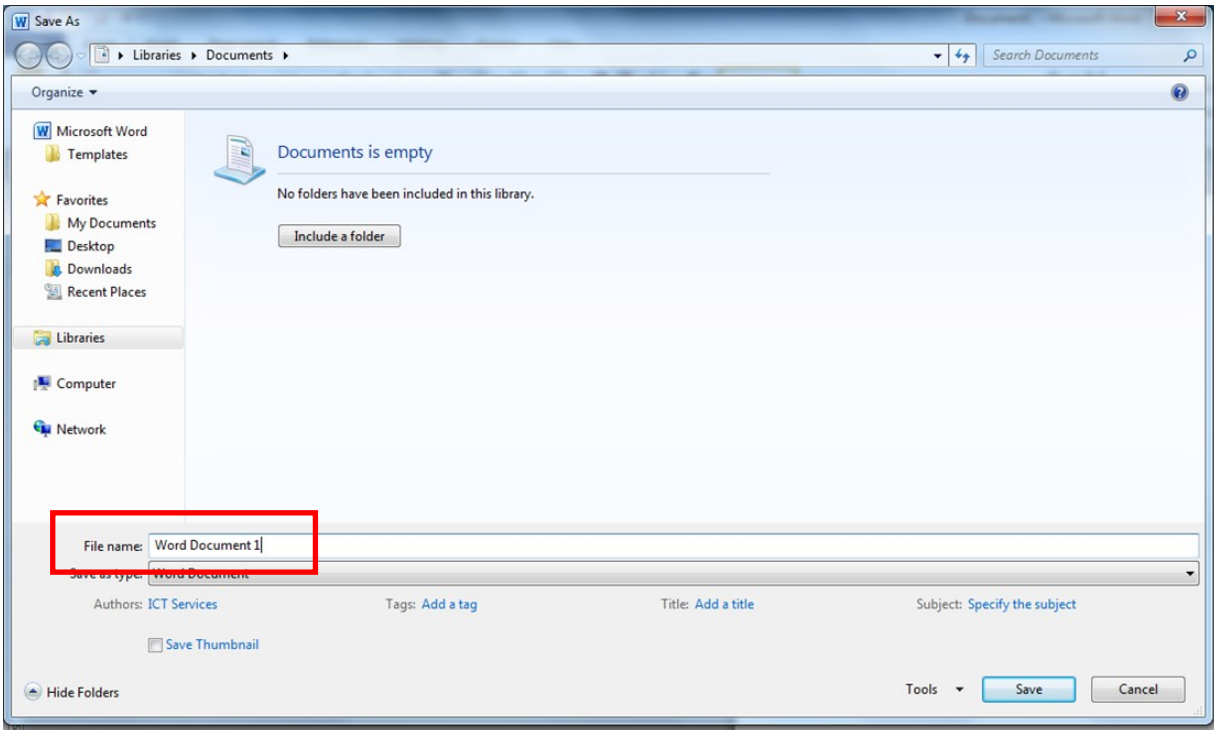
7. Let's take a closer look at the **Save As** box. It should look something like this:



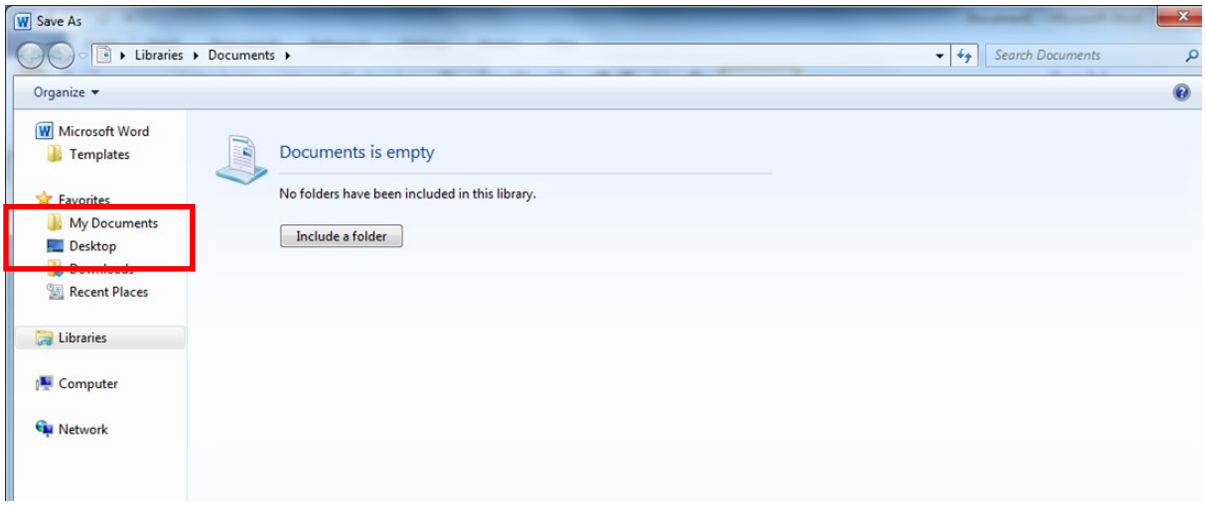
1. This is where the file will be saved. It shows the current folder, but this information will change if you select a different folder.
2. This is a list of folders in which you can save a file. By clicking one of these folders you can select it and open it. (Notice that some folders have sub-folders—that is, they have a folder inside another folder.)
3. When you select a folder on the left of the screen, this box will show any files already saved in that folder.
4. This is the file name. It's what the file will be called. Notice that Word has chosen a default name—this is what the file will be called if you save the file now.
5. Once you are happy with your options, click this button to save the file.

Saving a File

8. First we need to tell the computer what to call the file. We're going to call it *Word Document 1*. Type this in the file name box now (you can of course make up your own name):

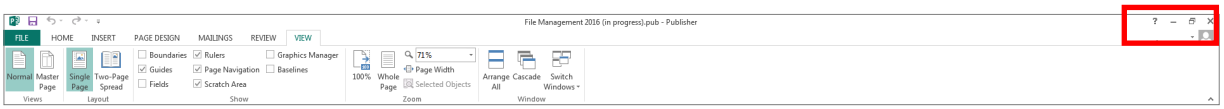


9. Now we need to tell the computer where to save the file. In this exercise we're going to save it on the **Desktop** (this is the screen you saw when you first started the computer. It's a handy place to keep things you use often). On the left of the screen, click the **Desktop**



Saving a File

10. Once you're happy, click the **Save** button to save the document. You can see the saved document on the desktop by minimising Word (and any other programs you have open). To minimise Word, click the small line in the top right corner of the screen:



11. You should now see the desktop and your saved Word document (it might not be in exactly the same place as in this illustration):

12. Remember that once you've saved a file for the first time, you don't need to repeat this process every time you save it (in other words, you don't need to keep clicking **Save As…**). On subsequent occasions you can use the **Save** function—Word will remember where to save the file and what to call it.

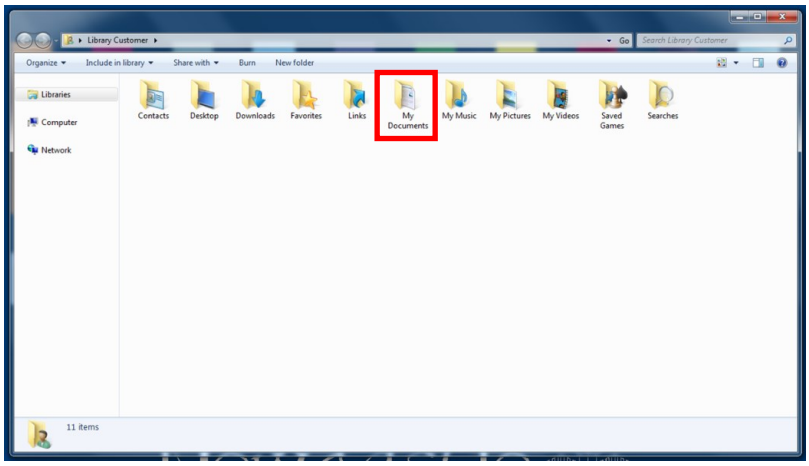
This is the process for saving a Word document, but you can repeat the process for any type of file. And remember that this is an example using a library computer. If you're using a computer at home, things might look a little different. But remember also that these differences will most likely be cosmetic! Look around and you'll find what you need.

Creating a Folder

In this section we're going to show you how to create a new folder on the library computers. Creating folders is a good way to keep related files organized.

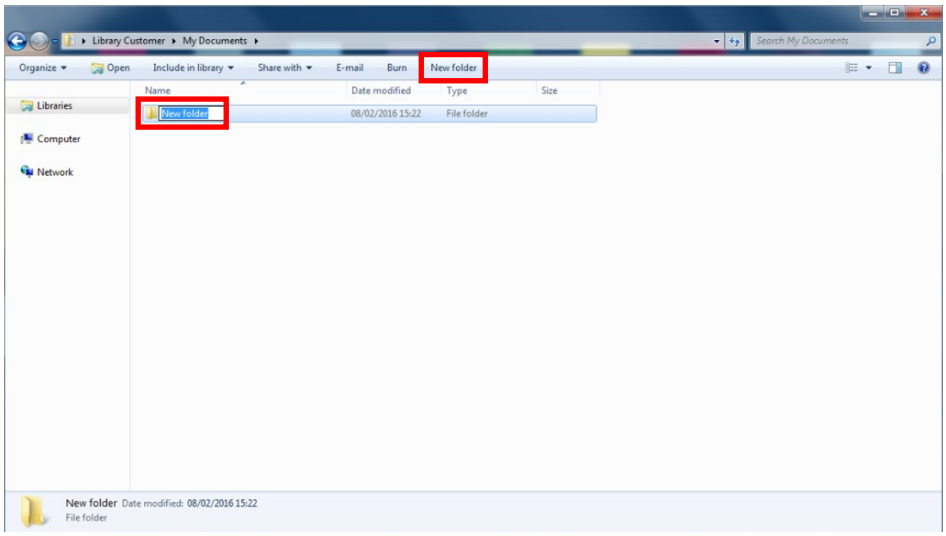
1. Let's create a new file in **My Documents**. **My Documents** can be found in the **Library Customer** folder, and the **Library Customer** folder can be found in the **Start** menu in the bottom left corner of the screen:

2. Once you've clicked the folder it should open. It will look like the screenshot below. Click the relevant folder to open **My Documents**.

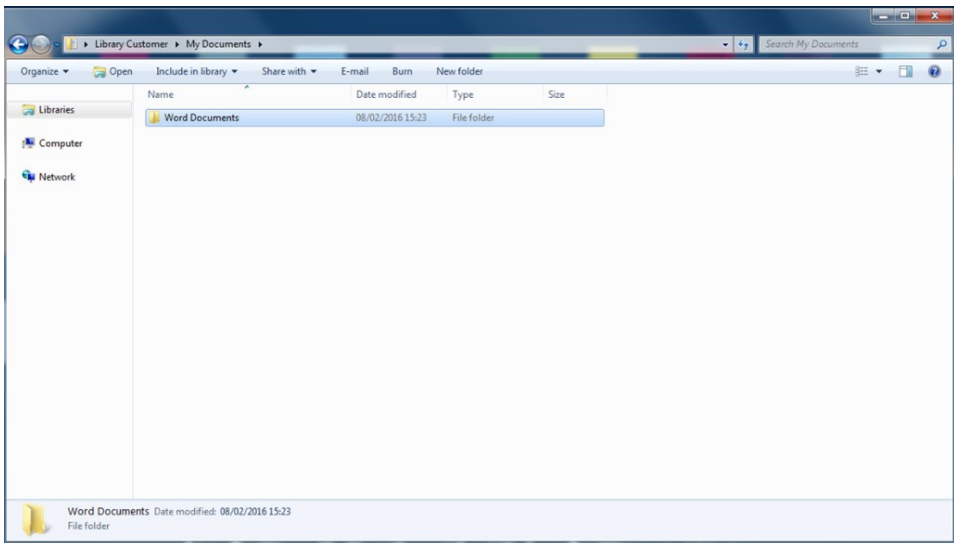


Creating a Folder

3. You should notice a row of options somewhere near the top of the window. One of those options is **New Folder**. If you click this button the computer will create a new folder:



4. Your computer will give you the choice of using the default name (New Folder) or giving the document a new name. Let's call it **Word Documents**. Once you've typed this, press **Enter** to save the folder.

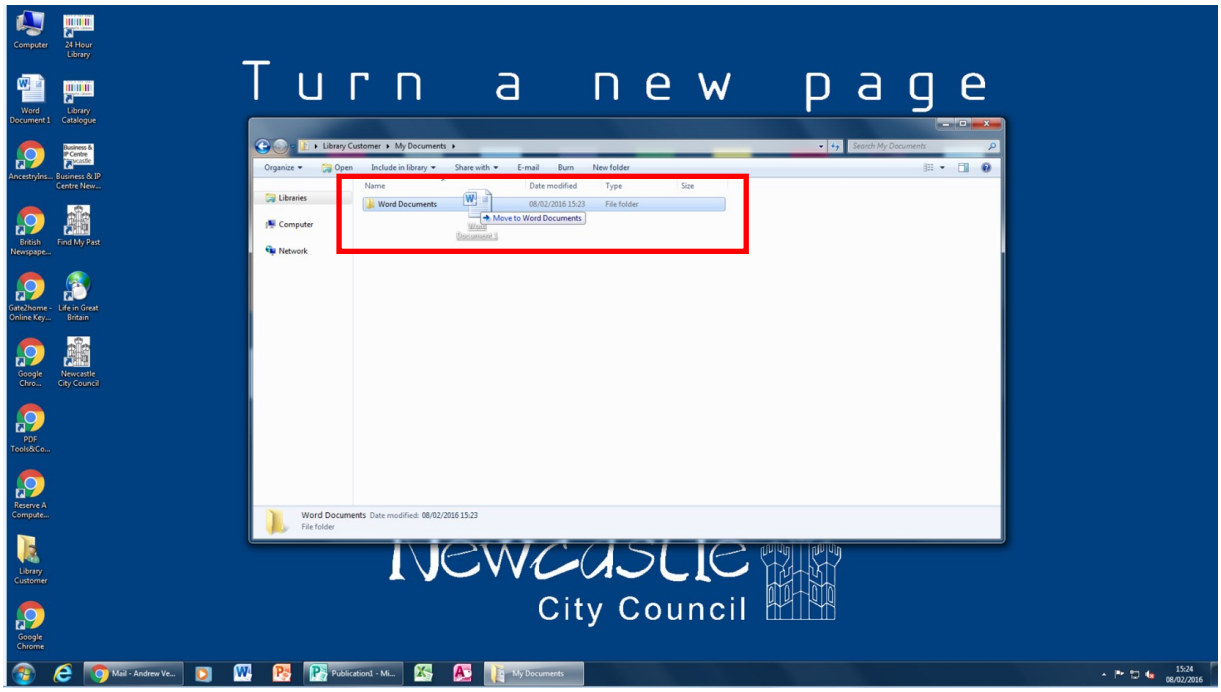


Now, when you save documents (as we did in the first part of this guide) this folder will appear as a place to save them. If you're so inclined you can even create more folders *inside* this folder.

Moving a File or Folder

1. Once you've created a file or a folder, you can move it around. You might, for example, want to move a group of related files into the same place. The easiest way to do this is to **drag** them. To put it simply, you can move a file or folder around the screen by moving your mouse over it and clicking and holding down the left mouse button. Now the file will move around the screen with your cursor.

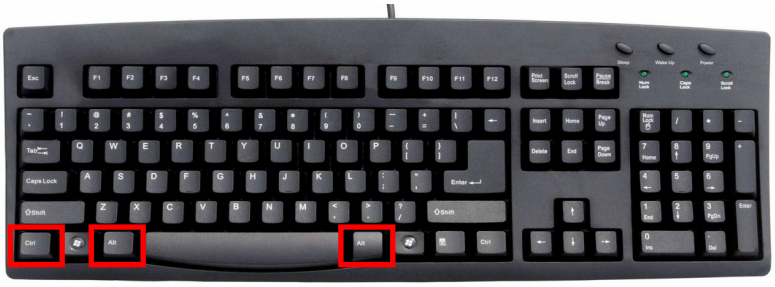
2. You can try this by putting the Word document we created in the first part of this guide into the folder we just created. Click and hold the Word document and then move the mouse until the document is hovering over the folder. Leave go and the computer will **drop** the file into the folder.



Don't worry if you accidentally drop the file somewhere you didn't intend. You can always just pick it up again and move it.

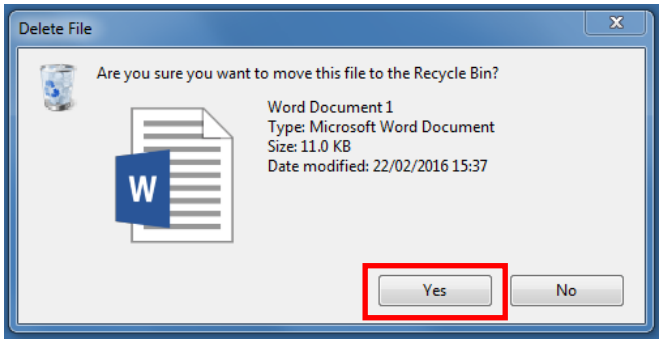
Deleting Folders and Files

1. To delete a file or a folder you first need to **select** it by clicking it with the left mouse button. If you're using a computer at home, this should be okay, but bear in mind that clicking a file or a folder on a library computer will automatically open it. To make sure this doesn't happen, hold down the **Ctrl** or **Alt** button before you click:



2. Now when you click a file it will be highlighted. Press the **Delete** key to delete the file:

3. Your computer will confirm that you want to delete the file (to make sure you don't delete anything by accident). If you're happy to delete the file, click **Yes**. Try this now with the Word document we created earlier (but make sure you close the document first; the computer will not let you save anything that's currently being used).



Conclusion

File management is not difficult to do, but you need to keep a few things in mind:

1. When you save a file, remember that you need to tell the computer where to save it and what to call it. And make sure that when you put a file somewhere you remember where you put it.
2. Use folders to keep your files organised. Just like in a filing cabinet, folders will help you keep the same types of documents in the same place and will save you the trouble of trying to find them.
3. Remember that the examples in this guide were made for Newcastle Library computers. If you're using a computer at home you might find that things look a little different. Don't worry, this is normal: if you play around you'll find that everything works more-or-less the same way.

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