[Figures are not included in this sample chapter]

Special Edition Using Microsoft Office 2000 Small Business Edition

- 3 -

Office File Management for Experts

In this chapter

- Choosing a Default Storage Location
- Creating New Files
- Using and Customizing Common Dialog Boxes
- Storing Document Details in the Properties Box
- Searching for Office Files
- Working with Multiple Files
- Troubleshooting
- Secrets of the Office Masters: Details, Details

Choosing a Default Storage Location

Two Office versions ago, Microsoft introduced the *My Documents folder*. The idea was simple: to create a default location for personal data files, making it easier for users to find and back up files they create. In practice, however, the first implementations of this idea were poorly thought out, and most expert Office users simply ignored the My Documents icon on the desktop--or quickly figured out how to delete it. Since its first appearance in 1995, the My Documents folder has evolved into a standard feature of Windows; if you deleted the Office version, you may have been startled to see it reappear when you upgraded Windows. Beginning with Windows 98, in fact, and continuing with Windows 2000, the My Documents folder has become an integral part of Windows, and that icon on the Windows desktop is much more useful.

Office 2000 makes extensive use of the My Documents folder. Advanced users may cringe at the name, but this system folder is the default starting point for common Open and Save As dialog boxes in Office applications. It's also hard-wired to an icon on the Places Bar in those dialog boxes. If you're willing to reorganize the way you store data files to take advantage of this location, you can substantially increase the odds that you'll find files you're looking for when you need them. You can

also change the default location that individual Office programs use for data files; it's slightly more difficult, but still possible, to redefine the location of the My Documents folder. (Oh, and if the name bugs you, just change it.)

The exact physical location of the My Documents folder varies, depending on which Windows version you have installed:

- On a system running Windows 95 or Windows 98 without user profiles, the My Documents folder appears in the root of the system drive, usually C:\My Documents.
- On a system running Windows 95 or Windows 98 with user profiles enabled, the My Documents folder appears in the user's local profile folder, typically C:\Windows\Profiles\<*username*>\My Documents.
- On a system running Windows NT 4.0 or earlier, the My Documents shortcut opens the Personal folder in the user's local profile, typically C:\Winnt\Profiles\<*username*>\Personal.
- On a system running Windows 2000, the My Documents folder appears in the user's local profile, normally C:\Winnt\Profiles\<*username*>\My Documents.

Windows 98 users can safely (and quickly) eliminate the My Documents icon from the desktop: Right-click the icon and choose Remove from Desktop. Because this icon is only a shortcut with a few special properties, eliminating it does not have any effect on files stored in the physical folder to which it points. To restore the My Documents icon to the desktop on a Windows 98 system, right-click any empty space on the desktop and choose New, My Documents Folder on Desktop.

In Windows 98 and Windows 2000, the My Documents icon on the desktop and in Explorer windows is actually a *shell extension*--a virtual folder like the My Computer and Network Neighborhood icons, not an actual physical location. Opening this shortcut opens the folder that's registered as the current user's My Documents location. To change the folder that this icon points to, right-click the My Documents icon and enter the folder name in the Target text box.

To change the location of the My Documents folder in Windows 95 or Windows NT 4.0, you need to use the TweakUI utility, available as part of the Windows 95 Power Toys collection from http://www.microsoft.com/windows/downloads.

Finally, you can change the default working folder for any individual Office application (with the exception of FrontPage), 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? If you're working on an extended project that requires constant access to files on a shared network folder, for example, 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 option.

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.

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

4. Click OK to close the Options dialog box and save your change.

Follow the same basic procedure for Excel, PowerPoint, Publisher, and Access, with the following exceptions: In Excel, Publisher, and Access, 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 you want to specify as the new default. Unfortunately, only Word lets you browse through drives and folders to find the one you want; with all other Office programs you must enter the full directory path manually.

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

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 always have access to the most current corporate templates in the three main Office applications. Users can continue to save and open personal templates in their own folder, but any Word, Excel, or PowerPoint template in the Workgroup Templates folder will "automagically" appear in the New dialog box of all three applications.

Behind the scenes, Office creates and uses one additional standard location, creating a group of subfolders in the Application Data folder. On a default Windows 98 setup without user profiles, you'll find these files at C:\Windows\Application Data\Microsoft. With user profiles enabled, this location is typically C:\Windows\Profiles\<*username*>\Application Data\Microsoft, with separate folders for each application, special-purpose folders for use by all Office programs, and one for Office itself. This location is where Office stores customization data, such as your Excel Personal macro workbook, any custom templates you create in any program (stored in the Templates folder), custom dictionaries (in the Proof folder), and icons you place on the QuickLaunch bar (in the QuickLaunch folder).

Creating New Files

When you use the New dialog box to select from available templates in Word, Excel, or PowerPoint, Office builds the tabbed dialog box 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 C:\Program Files\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; on a

Windows 98 machine with user profiles enabled, this would be C:\Windows\Profiles\<*username*>\Application Data\Microsoft\Templates.

- 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 the User Templates location have the same name, the Office program will display and use only the one from the User Templates location.

The default Office installation does not install all available templates; instead, you'll find shortcuts to some templates in the New dialog box. The first time you use one of these templates, Office attempts to install the supporting files. Word and Excel templates are covered in Chapters 14 and 19.

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

For more details on how to install templates and other Office components, **see** "Adding and Removing Office Features."

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 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 New 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 New dialog box.

4. Type a name for the template and click Save.

You can also create new Office files on the desktop or in any Explorer window by right-clicking and choosing New from the shortcut menu. All versions of Windows include shortcuts for Word documents, Excel workbooks, and PowerPoint presentations, as well as other common file types. The default shortcuts are nearly useless because they simply create a blank default document, and you can accomplish the same goal by opening any Office program and working with its default blank document.

But you can make this feature useful if you modify the documents available from this shortcut menu. For example, if you routinely compose letters to prospective clients, you can replace the default Word document (Winword8.doc) with one that includes the basic structure of a sales letter. Instead of sticking a Post-It note to your monitor reminding yourself to write a letter to Woody Leonhard, right-click on the desktop, choose New, Microsoft Word Document, and give the file a name that also defines your to-do item: Letter to Woody Leonhard. You don't need to open the document yet;

creating and naming the file gives you enough of a reminder.

You'll find all Office shortcuts in the ShellNew folder, one level below the default Windows folder (usually C:\Windows). Most Office applications include a shortcut here. Edit Winword8.doc or Excel.xls, for example, to change the file that appears on the desktop when you choose Microsoft Word Document or Microsoft Excel Worksheet, respectively, from the New menu.

Using and Customizing Common Dialog Boxes

One of the most noticeable changes in Office 2000 is the addition of the *Places Bar* to the common Open and Save As dialog boxes. As Figure 3.2 shows, this interface element includes five icons designed to speed navigation through common file locations:

FIGURE 3.2 *The Places Bar includes one-click shortcuts to five commonly used folders.*

- Click the History icon to open the Recent folder, which contains shortcuts to files and folders you've worked with. Office maintains up to 20 shortcuts for each file type in this folder. When you click this icon from within an Office program, Office displays only shortcuts appropriate to the application you're using.

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, open the user profile folder (on a Windows 98 machine, this is typically C:\Windows\Profiles\<*username*>) and look in Application Data\Microsoft\Office\Recent.

- Click the My Documents icon to open the personal data folder for the user currently logged on. As noted earlier, Windows allows you to change the target folder that Office opens when you click this icon.

- Click the Desktop icon to open or save files on the Windows desktop. Use the desktop as a holding area when you want to create a file and move it elsewhere using the Windows Explorer. Using the desktop as a permanent storage area is generally a bad idea because of the tendency of most Office applications to create temporary files in the same location as the file you're working with.

- Click the Favorites icon to display the contents of Internet Explorer's Favorites menu.

- Click the Web Folders icon to manage files on a Web server.

To learn more about using Office 2000 Web Folders, **see** "Creating and Managing Web Folders."

Do you routinely store files in locations other than the My Documents folder? If so, add shortcuts to commonly used folders and shared network locations in the My Documents folder.

In Open and Save dialog boxes, Office 2000 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 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 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 as you select files in this fashion that 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 four icon arrangements:

- List uses small icons to display as many files as possible in the box.

- Details displays size, file type, and other information, as shown in Figure 3.3; click any heading to sort the list by that category. (If you think the information in the Type column is useless, we agree. Skip to the "Secrets of the Office Masters" section at the end of this chapter for details on how to make the Details view much more useful.)

- 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 (as in the earlier example in Figure 3.2). In general, you should avoid this option 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. 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.

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

FIGURE 3.3 *Click the Views button to change the arrangement of icons in the Open and Save As dialog boxes.*

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 five locations in the Places Bar are hard-wired in the Windows Registry.

If all you have to work with is Windows itself, changing the locations on the Places Bar requires the software equivalent of dynamite--in other words, the Registry Editor--because Microsoft is determined to prevent ordinary end users from mucking with this basic interface element, and then

calling in on the tech-support lines for rescue. Unlike the supremely customizable *Outlook Bar (page 657)*, which it superficially resembles, the Places Bar has to fit in the strict confines of the common dialog boxes. You can use the techniques outlined in this section to substitute other locations for the five hard-wired icons on the Places Bar, but there's a much better solution. Install the free copy of WOPR 2000 (included on Que's Special Edition WOPR 2000 Pack CD) and use the Placebar Customizer utility.

As with most advanced interface elements, however, it is possible to hide one of these system folders and replace its entry with a location of your own choosing. As always, exercise extreme caution when modifying the system Registry. We don't recommend that you replace any of the top three icons on the Places Bar--all of which are exceptionally useful on an everyday basis. However, for some users the Favorites and Web Folders shortcuts are completely expendable.

To replace the Favorites button with a shared network folder, for example, follow these steps:

1. Open the Registry Editor and select the key HKEY_CURRENT_USER\Software\ Microsoft\Office\9.0\Common\ Open Find\Places\StandardPlaces\Favorites.

2. Right-click in the right window and choose New, DWORD Value. Name the new entry Show. Leave the value at its default of 0.

3. Right-click the following key: HKEY_CURRENT_USER\Software\Microsoft\ Office\9.0 \Common\Open Find\Places\UserDefinedPlaces. From the shortcut menu, select New, Key. Name the new key Place1. (If there's an existing key with that name, use Place2, Place3, and so on.)

4. Select the Place1 key. In the right window, right-click and choose New, String Value. Rename the new entry Name. Follow the same procedure to create a second string value called Path.

5. Double-click the Name value and enter the label you want to appear under the icon in the Places Bar. Double-click the Path value and enter the full path. Use the drive letter and colon for a local folder; enter a UNC-style address, such as *servername*\ *sharename**folder*, for a network location. When you finish, the Registry entries should look like those shown in Figure 3.4.

FIGURE 3.4 *Add these custom Registry settings to replace an icon on the Places Bar with a location of your own choosing.*

6. Close the Registry Editor to save your changes. The custom folder now appears in the Places Bar for Open and Save As dialog boxes.

Naming Documents

Office documents must follow these file-naming rules:

- A filename may contain any *alphanumeric* character, including the letters A to Z and numbers from 0 to 9.

- A filename may 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.

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 (/), backslash (\), colon (:), asterisk (*), question mark (?), 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). However, a file extension is not required, nor are file extensions restricted to three characters. To force an Office program to use the exact name and extension you specify, enter the full name, including extension, between quotation marks.

If you use a nonstandard file extension, you may 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.

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

If you encounter problems when sharing files with coworkers who use 16-bit Windows or DOS programs, see "Dealing with Short Filenames" in the Troubleshooting section at the end of this chapter.

Protecting Documents from Changes

When you save a Word document or Excel workbook, three well-hidden options allow you to protect the original file or restrict further changes. To select any or all of these options, choose File, Save As. Then, in the Save As dialog box, click Tools, General Options.

- To avoid accidentally overwriting an earlier version of a document or worksheet, select the Always Create Backup Copy check box. This option saves a backup copy of the original version every time you open or save a file.

This protective measure is of limited value. It's designed to protect you from incredibly obvious mistakes, and it's useful only if you discover your mistake immediately. Let's say you open a Word document, make some changes, and save the changed document under the same name. If you then discover to your horror that you've altered the master copy of a crucial document, you can open the backup copy and recover the original. However, if you make some more changes and save your work a second time, Word creates a backup of the first set of changes you made, replacing the backup it created when you opened the file. At that point, the original document is history, and you'd better hope you have a good backup tape.

- Use password options to lock your Word document or Excel worksheet so that other users can open or modify the file only when they enter the password you specify.

Passwords add only rudimentary security to Office files. Setting a password is an effective way to prevent accidental changes to a file, and any password will deter curious users from browsing a file. But determined snoops will have no trouble cracking passwords with the help of easy-to-use utilities that are widely available on the Internet. If security is truly important, you need to restrict access to sensitive files by using server-side authentication and system policies. If you want to improve the security of your Office files, we recommend getting a copy of TSS OfficeLock (www.officelock.com).

- To discourage users (including you) from making changes to the original document, select the Read-Only Recommended check box. When you set this option, Word and Excel prevent you from saving changes by using the existing filename. This technique is particularly useful when you frequently use the same document or worksheet as the base for new files. With the read-only option recommended, you'll see a dialog box when you open the document. If you click yes, you'll be unable to overwrite your original file accidentally.

If your goal is to prevent other users from damaging an important file (especially users who might not be sophisticated enough to understand the consequences of this option), use a Modify password instead. This option is unavailable if you save a document in Word 6.0/95 format.

Using Alternative File Formats

By default, Office applications save data files in their own *binary* formats. That's the correct choice under most circumstances, but when you share files with a coworker who does not use Office 2000, you may need to open or save a file in a different format.

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. In Office 2000, the preferred format for sharing data is *HTML (page 175)*, which is virtually guaranteed to be readable by any other person, even on a computer without a single byte of Microsoft code.

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 you want to convert may 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 for Lotus 1-2-3 spreadsheet files, select the appropriate entry from the Files of Type drop-

down list.

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 may need to supply the Office CD to install a particular converter before opening or saving a file in that format.

To help ensure that Word files you create can be accessed by users with other versions of Office, **see** "Avoiding Compatibility Problems."

To learn more about Excel file compatibility, **see** "File Compatibility Issues."

Storing Document Details in the Properties Box

The Windows file system keeps track of details about each file: its size, when it was created, and when you last modified it, for example. Windows allows you to store extra details about Office file types; these *properties* include the author's name, a title and subject for the file, and comments or keywords you can use to search for documents later. A Custom properties sheet lets you track more than two dozen built-in categories or add your own.

Maintaining file properties takes a fair amount of up-front work, but it can have a profound payoff, especially in a networked office where many users share documents.

- When you use the Find tools in the Open dialog box, you can specify 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, it's trivially easy to locate all the files associated with that activity.

- If you use Outlook's Integrated File Management features, you can create custom views that include any properties in this dialog box. By adding the Author and Title fields to an Outlook view, for example, you can group the contents of a folder by author and by title--something you simply can't do with the Windows Explorer.

For a brief overview of how Outlook allows you to manage files, **see** "Managing Files and Folders in Outlook."

- All file properties are available to macros you create by using Visual Basic for Applications. As a result, you can create simple but effective document management routines that are limited only by your imagination. For example, you can create AutoNew macros that prompt users for

key information every time they create a new document based on a particular Word template. You can then use that information to file or route the document when the user saves it.

For more ideas and techniques using VBA, **see** "Building Custom Applications with VBA."

To view and edit details for the current file, choose File, Properties. The dialog box that appears resembles the one in Figure 3.5.

FIGURE 3.5 *The Properties dialog box (in this case for the file Budget Update Memo) 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 when you use Outlook's file management capabilities, because the text appears beneath each filename when you turn on AutoPreview.
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 information is frequently incorrect, especially when you inspect it from the shortcut menus in an Explorer window. Professional writers and students who rely on these statistics should always inspect them from within the document itself to guarantee that the information is up-to-date.
Contents	Shows the parts of the file: the outline of a Word document, based on heading styles; worksheet titles in an Excel workbook; or slide titles in a PowerPoint presentation.
Custom	Choose from 27 built-in fields, including Client, Document Number, and Date Completed, or add a field of your own choosing. 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.

For data files located on a disk that uses the Windows NT file system--NTFS--you'll see a sixth tab that contains security settings.

For simple projects, you may choose to ignore file properties; in these cases, a descriptive filename can tell you everything you need to know about the file. For more complicated documents, however, adding file details--including keywords and categories--can help you or a coworker 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 before you 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,"

Default Document Properties

By default, Office applications save only a few document properties when you save a file. Properties saved vary by application:

- Windows stores standard file details, including the name, size, and date and time the file was modified.
- All Office applications add your name in the Author field and your organization's name in the Company field.
- 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.

In Word documents in particular, this capability can lead to embarrassing consequences if you're not careful. By default, if you fail 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 memo and save it, your initial angry words may survive in the Title field, even if you tone down your rhetoric considerably in the final version. 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

In an office where a large number of people create and share files, custom file properties can make it easier for workgroups to 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 Find tool in Office common dialog boxes to find files whose properties match a particular set of criteria. Figure 3.6 shows a Word document that includes several custom properties.

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.*

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 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.

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.

Using Explorer to View File Properties

To view any Office file's properties without opening the file itself, open an Explorer window, right-click the file's icon, and then choose Properties. If you're using Windows 98, Windows NT 4.0, or Windows 2000, you can edit most file properties for Word documents, Excel spreadsheets, and PowerPoint presentations directly from an Explorer window. If you're using Windows 95, you can view properties on the General, Summary, and Statistics tabs, but you must open the file with its associated program to change those properties. 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.

If you've configured Explorer to use Web view, you can see some Office file properties, such as the author's name, in the info pane along the left side of the 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 checked the Save Preview Picture box on the Summary tab of the properties dialog box. By default, this box is unchecked for Word documents and Excel workbooks and checked for PowerPoint presentations.

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.

FIGURE 3.7 *In Web view, Explorer windows display some information drawn from an Office file's properties. The thumbnail preview is available only if you check an option when saving the file.*

Searching for Office Files

The Open dialog box displays a list of all files in the current 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. Office includes a powerful Find tool, available from the Open dialog box, that allows you to search for files 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 you remember using in the document--you can probably find it. In workgroups, you can save and reuse searches to create a basic document management system.

For example, a sales manager might look on a shared network file server for all presentations that have been updated in the past week. Or a legal secretary might search for files that include a specific case number and are not marked completed. If space is at a premium on your local hard drive, you can search for all Office files that were last modified more than six months ago, and then move them to a new location. You can save any custom search and reuse it later.

From within the Open dialog box, choose Tools, Find to open the Find dialog box, as shown in Figure 3.8.

FIGURE 3.8 *Search for one Office file by name, date, or property, or filter out a select list of files by using search criteria like these.*

It's possible, although not easy, to transfer a saved search from one PC to another. Open the Registry Editor (Regedit.exe) and find the key HKEY_CURRENT_USER\Software\ Microsoft\Office\9.0 \Common\Open Find\<*Application Name*>\Saved Searches. Choose Registry, Export Registry File. Choose the Selected Branch option and save the file by using a descriptive name and the default .reg extension. To add the saved searches to a different PC, incorporate the saved settings into its Registry by double-clicking the .reg file.

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 instance), statistics (such as the number of slides in a PowerPoint presentation or number of paragraphs in a Word document), and Office custom properties.

- Condition--Defines the comparison 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 allow 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.

Finding Files by Name, Date, or Content

To conduct a simple search by name, date, or file content, open the Find dialog box and follow these steps:

1. Choose File Name from the Property list.

2. In the Condition list, select Includes if you want to search for a text string anywhere in the filename; select Begins With to narrow the list to files that begin with the string you enter.

3. In the Value box, enter the string you want to look for.

4. Click Add to List. The criterion appears in the list at the top of the dialog box:

- To narrow the selection of files by date, repeat steps 1-4 by using the Creation Date or Last Modified fields. Specify conditions and enter dates if necessary. You can also enter relative dates (last month, yesterday, or in the last 2 weeks, for example).

- To search for files by content, repeat steps 1-4 by using the Contents field. Choose a condition and enter one or more words or phrases in the Value box.

The File Name property always appears at the top of the list of search criteria and cannot be moved, nor can you enter more than one of this type of criteria; use *wildcards (page 261)* to specify multiple filenames. You can combine Files of Type properties in a query, but only by using the OR operator (Word Documents OR Web Pages, for example). If you attempt to enter either of these types of criteria incorrectly, Office will display a dialog box offering to correct the entries for you. Strict rules govern the use of other criteria with the OR and AND operators. If you make a mistake at any point, Office will offer to correct the entry for you. At any time, you can select the bottom entry from the list of criteria, click Delete, and add another.

5. Specify the drive or folder to search. Choose from the Look In list at the bottom of the dialog box. To include all folders inside the folder you select, click the Search Subfolders option. Note that you can specify multiple folders; separate each name with a semicolon.

6. To begin searching, click the Find Now button (or press Enter). The status bar at the bottom of the dialog box displays a progress report during the search and then reports how many matching files Office found.

When the search is complete, you'll see a list of files that match the selected criteria in the Open dialog box. Choose List view to see only the file icons, regardless of the folder in which they're stored; choose any other view to see a tree-style listing that shows each found file in its subfolder.

Using Document Properties to Locate Files

Use the Find tool 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 Find dialog box. To search for properties you've added to the Custom tab, you need to manually enter the name of the property.

Remember that all Office applications automatically add the author's name and organization when you create or save a file. To change this information in any Office application, see the instructions in Chapter 2, "Customizing the Office Interface." If you inadvertently entered the wrong information

when installing Windows, you can change these details by editing two keys in the Registry: Search for HKEY_LOCAL_MACHINE\SOFTWARE\ Microsoft\Windows\CurrentVersion and edit the string values Registered Owner and Registered Organization.

Saving and Reusing Searches

Putting together a complex search to locate a particular group of files, especially on an overstuffed network server, takes time and testing. By saving the criteria and other parameters for a search under its own name, you can reuse the saved search at any time without having to reinvent the wheel. A library of saved searches can save you substantial time, even if you simply use them as the starting point for additional searches; for example, by defining a search that looks for all Word documents and Web pages that were saved in the last month on a particular server and all its subfolders, you can simply open the saved search and add one more criterion to search for a particular word in those files.

To save a search, follow these steps:

1. Define all criteria for the search and specify the search location.

2. Click Save Search.

3. Enter a descriptive name of up to 70 characters and click OK.

To reuse a saved search, open the Find dialog box and click Open Search. The dialog box shown in Figure 3.9 appears.

FIGURE 3.9 *Choose from a list of saved searches to quickly filter the list of files in the Open dialog box.*

Next, select the custom search you want to use and then click Open to plug the parameters from the saved search into the Find dialog box.

To manage a list of saved searches, use the Rename and Delete buttons. To edit an existing search, open the search, make any desired changes, and save it under a new name.

Curiously, although the interface for the Find dialog box is identical across all Office programs, a search you save in one application is not available in others. If you've created a complex search and saved it in Word, you'll need to re-create the criteria list and save a separate copy in Excel or PowerPoint.

Configuring the Find Fast Utility

In Office 97, Microsoft introduced an indexing utility called *Find Fast*, designed to make it easier to find Office files by searching for text within those files. Although the Find Fast utility is not part of a default Office 2000 installation, it appears in your Startup group if you upgrade over Office 97. (To add the Office 2000 version of this utility, run Setup and look under Office Tools.)

The first time you attempt to create a complex search by using the Find dialog box, Office offers to install Find Fast for you. If you're willing to configure it by using the steps outlined here, you can dramatically speed up full-text searches without negatively affecting your system's performance.

Find Fast scans local drives at regular intervals, building a full-text index that speeds up searches in the Open dialog box. Unfortunately, the Find Fast utility drives some Office users crazy because the default settings build an index of every file on your system, and Find Fast updates the index every two hours. Left unchecked, Find Fast can drag your system's performance down for as long as it takes to update the index.

Virtually every Office book we've ever read treats the Find Fast utility as a nuisance at best, and at worst a form of virus. Most books on previous versions of Office, in fact, recommend that you disable or delete the Find Fast utility. That advice is short-sighted. True, if you never use the file-finding tools in Office 2000's common dialog boxes, you can safely remove the Find Fast program shortcut from the Startup group. To take advantage of its indexing capabilities but limit its impact on system performance, however, adjust the Find Fast settings so that this utility is more selective and less disruptive.

To change Find Fast settings, follow these steps:

1. Click the Start button, choose Settings, and click Control Panel.

2. Click the Find Fast option. A dialog box appears that is similar to the one in Figure 3.10, with one index for each local drive.

FIGURE 3.10 *The Find Fast utility creates full-text indexes for every local drive.*

3. Select the first entry in the list of indexes, and choose Index, Delete Index. Repeat this step for each entry in the list.

4. After removing all previous indexes, choose Index, Create Index. The Create Index dialog box appears as shown in Figure 3.11.

FIGURE 3.11 *Create new Find Fast indexes covering only the folders in which you actually store documents.*

5. Click the Browse button and select the My Documents folder. Note that this index also covers subfolders of the folder you select. Leave all other options at their default settings and click OK. Find Fast creates the new index immediately.

6. Repeat steps 4 and 5 for other folders in which you store documents.

7. Choose Index, Update Interval. Adjust the frequency of updates to the interval you prefer, in hours. (For most users, a value of 8 is appropriate here; experiment to see which value is best for you.)

8. Close the Find Fast dialog box.

Working with Multiple Files

Word, Excel, PowerPoint, and FrontPage allow you to open more than one file at a time. Access and

Publisher do not. To open multiple files using the common dialog boxes, follow these steps:

1. Press Ctrl+O or choose File, Open 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 you want to insert the file at the point where you dropped it. The same thing happens if you drop a Web page icon into a FrontPage window in which you're editing another Web page. To open the document or Web page in a new window instead, drop the icon onto the title bar of the Word or FrontPage program window.

When you open multiple document windows in an Office 2000 application, you should note some significant differences from the way the same programs worked in Office 97. In previous Office versions, the only way to manage multiple documents was through the Window menu; in Office 2000, each new data file gets its own button on the Windows taskbar, and you can switch between document windows the same way you switch between programs.

Office 2000's single document interface, in which each data file gets its own window, requires Windows 98, Windows 2000, Internet Explorer 4 with the Windows Desktop Update or Internet Explorer 5.

Unfortunately, Office 2000's techniques for handling multiple document windows are wildly inconsistent between applications. 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. Excel and PowerPoint, on the other hand, allow you to rearrange 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.

If you prefer the multiple document interface, in which all open documents appear in one program window with a single taskbar button, you can configure Excel and PowerPoint (but not Word or FrontPage) to use this window arrangement. Choose Tools, Options, click the View tab, and clear the checkmark from the Windows in Taskbar box.

Troubleshooting

Putting Templates in Their Place

You created a group of templates and dutifully saved them along with the standard Office templates in the C:\Program Files\Microsoft Office\Templates\1033 folder. But when you choose File, New, none of your 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, choose Tools, Options, click the File Locations tab, and verify the User Templates location.

No Preview in Common Dialog Boxes

You've selected Preview from the drop-down menu of views in an Office common dialog box, but when you click on a file in the pane on the left, Windows displays the words Preview not available instead of showing your 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 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, check the box, save the file under a new name, and use Windows Explorer to delete the old version and rename the new one with the old name.

Dealing with Short Filenames

Several coworkers in your organization use Windows 3.1 and Office 4. When they browse through shared folders for files you've created, they have a difficult time telling which is which, because all the files have names like Letter~1.doc.

Saving files in the correct format is only half the battle. If you routinely share document folders with coworkers who use 16-bit Windows or DOS programs that don't recognize long filenames, you need to follow some common-sense rules. For starters, try to restrict filenames to a maximum of eight characters, not counting the extension. If you must use longer names, make sure the first six characters in the name will provide a clue as to the file's contents when viewed in a 16-bit common dialog box. As you've seen, Windows will add a two-character numeric tail to the short version of each filename, making only the first six characters significant. (Although some well-meaning Windows experts have published a tip that enables you to hack the Registry and change this behavior, we strongly recommend that you not follow this advice; as an unfortunate side effect, you may end up with duplicate Program Files folders.)

When naming files that you expect to share with users of 16-bit programs, avoid using anything except letters and numbers in the first eight characters of a filename. When creating the aliases that 16-bit programs use, Windows substitutes an underscore for special characters such as semicolons, plus signs, and brackets, and the effect is to make the filename nearly indecipherable to those users.

Secrets of the Office Masters: Details, Details

In common dialog boxes, trying to use information in the Type column is an exercise in frustration, thanks to Microsoft's marketing machine. After a default installation of Office 2000, Premium

Edition, you'll have 75 registered file types, each starting with the word Microsoft--Microsoft Word Document, Microsoft Excel Worksheet, even Microsoft HTML Document 4.0. The effect is to make it impossible to distinguish the types of documents in a detailed list unless you expand the Type column to a ridiculous width.

Making all file extensions visible is a crude solution to this problem. It clutters up Explorer windows and the desktop with all those useless extensions, and Explorer windows don't allow you to sort by this information anyway.

So here's a better idea: Regain control of the file types you use most often, removing the useless Microsoft tag at the beginning of each one and making extensions visible for selected file types, such as HTML documents, where you may want to edit that change on demand.

In Windows 98, Windows 95 with IE4's Windows Desktop Update, or Windows NT 4.0, follow these steps: Open any Explorer window (the My Documents or My Computer folder is a good choice), choose View, Folder Options, and then click the File Types tab. Scroll through the list of registered file types until you reach the Microsoft block, and begin editing each file type. Select a file type (Microsoft Word Document, for example) and click the Edit button. In the Edit File Type dialog box, remove the unnecessary Microsoft from the Description of Type box. Click the Always Show Extension box to ensure that .doc extensions are always visible (and editable) in Explorer windows.

Repeat this process for other file types, such as Microsoft HTML Document 4.0 and Microsoft Excel Worksheet. Now, when you use Details view, you'll really see the details that matter.