

Computer Filing System

by Joe Stoddard

One of the biggest fears contractors have about computerizing their offices is not being able to find important business information when they need it. Since a misplaced paper file is often easier to find than a misplaced electronic one, it's important to understand how computers store information, and how you can customize your system so that it makes sense for the way you do business.

Files and Folders

Early personal computers used operating systems that stored programs and

documents in a hierarchy of "directories" and "subdirectories." This made little sense to anyone but computer geeks, until Apple introduced the Macintosh, which depicted directories with little pictures or icons of manila folders. Even though the computer's storage structure hasn't changed, the term "folders" makes it easy to think of the hard drive in your computer as a big filing cabinet in your office. The cabinet holds folders, which themselves can hold other folders, as well as individual "files." In computer lingo, the two most common types of files are "program

files," which make applications like word processors and spreadsheets operate, and "data" files, which are the documents you create using the programs — letters, estimates, CAD drawings, marketing materials, and so on.

Storing Program Files

As with a paper-based filing cabinet, the efficiency of a computer filing system depends on how well you organize the folders and files. The first step is to install program files in folders that make sense to you. In the old days, most applications wouldn't run prop-

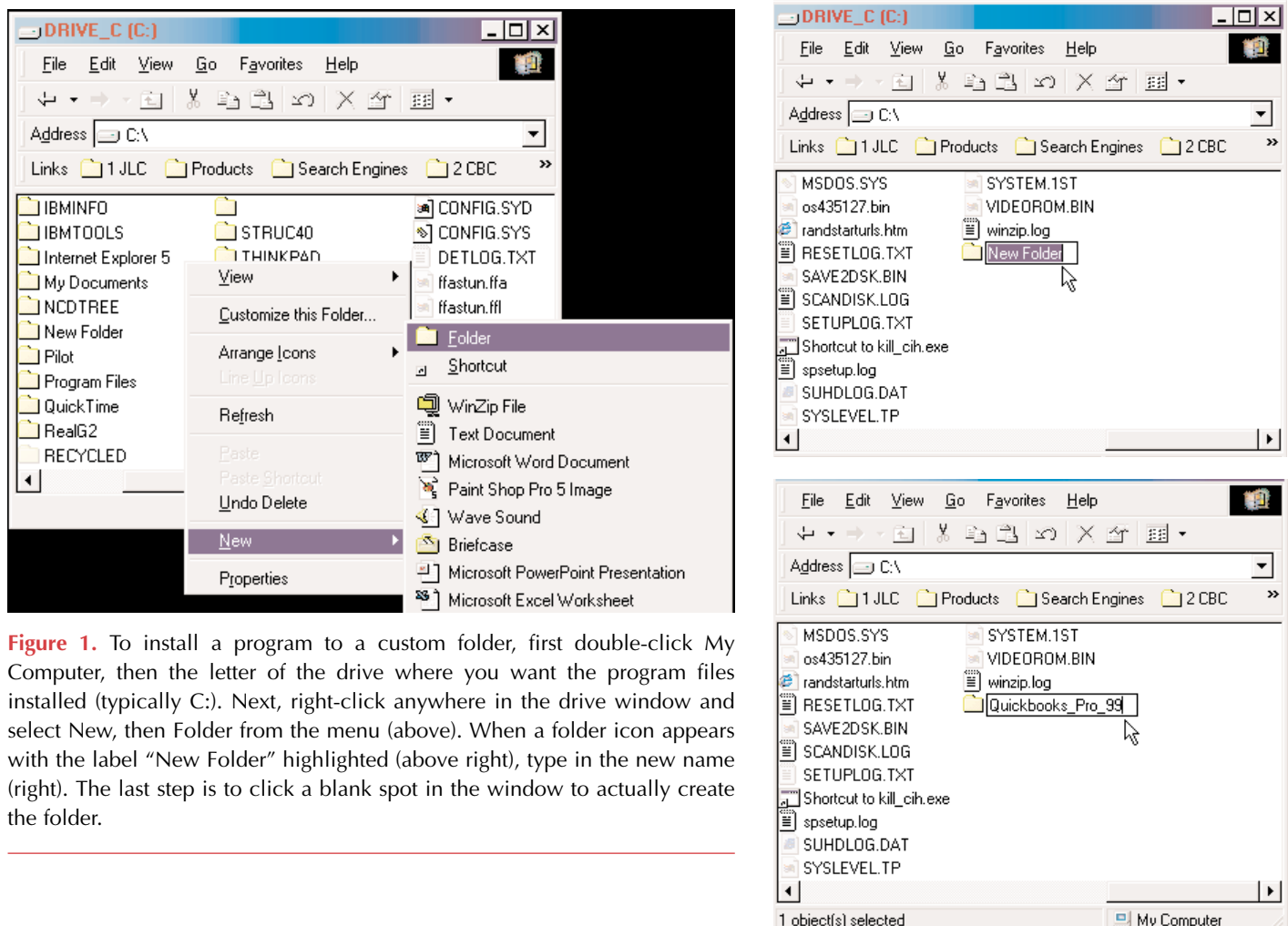


Figure 1. To install a program to a custom folder, first double-click My Computer, then the letter of the drive where you want the program files installed (typically C:). Next, right-click anywhere in the drive window and select New, then Folder from the menu (above). When a folder icon appears with the label "New Folder" highlighted (above right), type in the new name (right). The last step is to click a blank spot in the window to actually create the folder.

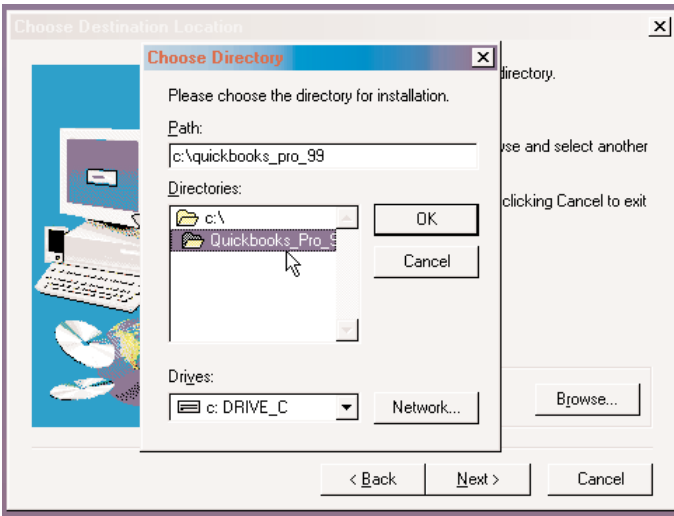


Figure 2. During program installation, click Browse to find your newly created program folder.

erly if they weren't installed in a folder with a particular name in a particular location. Fortunately, today you can give a program folder almost any name and put it anywhere on the hard drive, because Windows keeps track (in the system registry) of where critical program files are located.

But you have to stay on your toes. Unless you specify otherwise during installation, most Windows programs will be stored in the default folder *C:\Program Files*. Blindly accepting this default, however, could make it difficult to find the program files again. A better approach is to store each application in its own unique folder. While it isn't difficult to create these folders, if you miss a couple of critical steps during installation, the program file may still not find its way into the folder you made for it.

Making new folders. Windows provides two ways to create program folders — before you start installation or on the fly during installation. To create an application folder ahead of time, double-click (with the left mouse button) on “My Computer” — typically you can find this icon in the upper left-hand corner of your screen — then double-click the drive letter you want to install the program to (typically C:), which opens a new window. *Right-click* in a blank spot in the window, select *New*, then *Folder* (see Figure 1, previous page). A yellow folder icon will appear with the name “New Folder” highlighted and ready to be edited. Type in a folder name that makes sense to you,

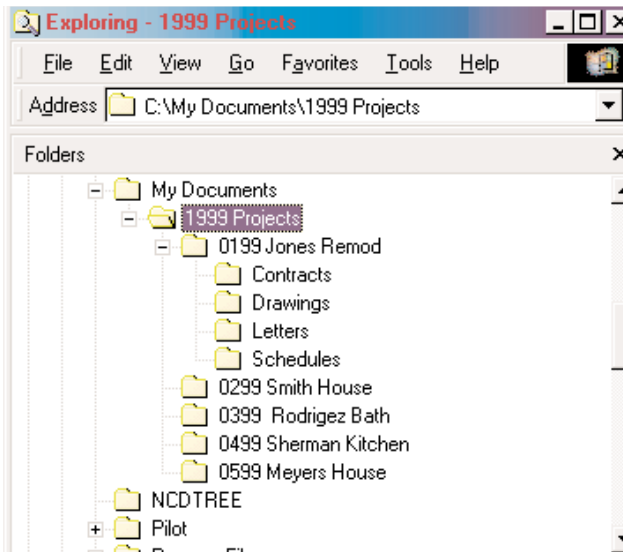


Figure 3. A series of sub-folders will make it easier to find files in the My Documents folder. Here, a series of folders named after clients are organized under a “master” folder called “1999 Projects.”

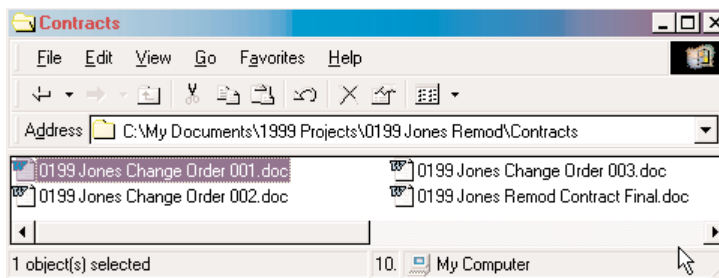
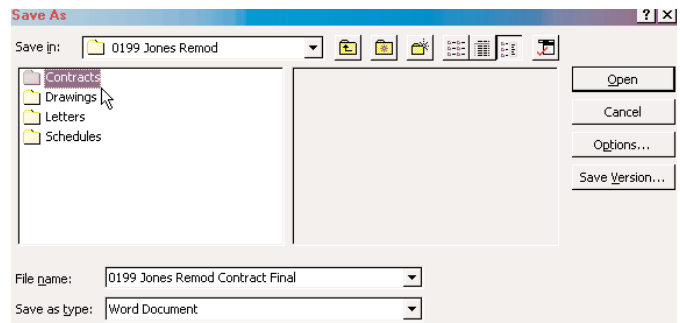


Figure 4. Save new documents with files of the same type in the appropriate job folder. Here, using the Save As command stores a contract for the Jones job in the Contracts folder (above right), which also holds other contract-related files (above).

such as “Quickbooks_Pro_99,” then — and this is important — click in a blank area of the dialog box to actually create the folder. (You can also hit the Enter key at this point to create the folder, but a misstep here could erase the folder. Clicking the dialogue box is safer.)

Now start the program installation. When it asks you where you want the files installed, click the “Browse” button and find your new folder (Figure 2, previous page). (If you created the new folder without naming it properly, you can change the name by right-clicking on it and choosing “Rename” from the menu.)

You can also create and name a new folder on the fly during installation. The exact method will vary depending on the installation routine, but the most common routine, Install Shield, prompts you for a folder name. At this point, click “Browse,” then navigate to the very top of the list of folders till you find the letter of the drive (typically C:) on which you want to install the program. Simply type in the name of the new folder, then Install Shield creates the folder for you.

Organizing Data Files

Even more critical to your mental health than knowing where your applications are installed is knowing where and how your data files are organized. Unless you specify otherwise, everything will be saved either somewhere inside the program folder, or in that vast wasteland Windows 95/98 calls “My Documents.” The My Documents folder is not your run-of-the-mill folder, and is actually a critical part of the Windows 95/98 operating system. But at a simple level, it represents Microsoft’s attempt to help new users avoid the common problem of saving data files in program folders and not being able to find them again. Unfortunately, using the My Documents folder to store data files still produces a mixed-up jumble of different file types.

For contractors, a better strategy is to create a hierarchy of subfolders, each of which represents a single project or activity. These subfolders can still be created within My Documents, but they

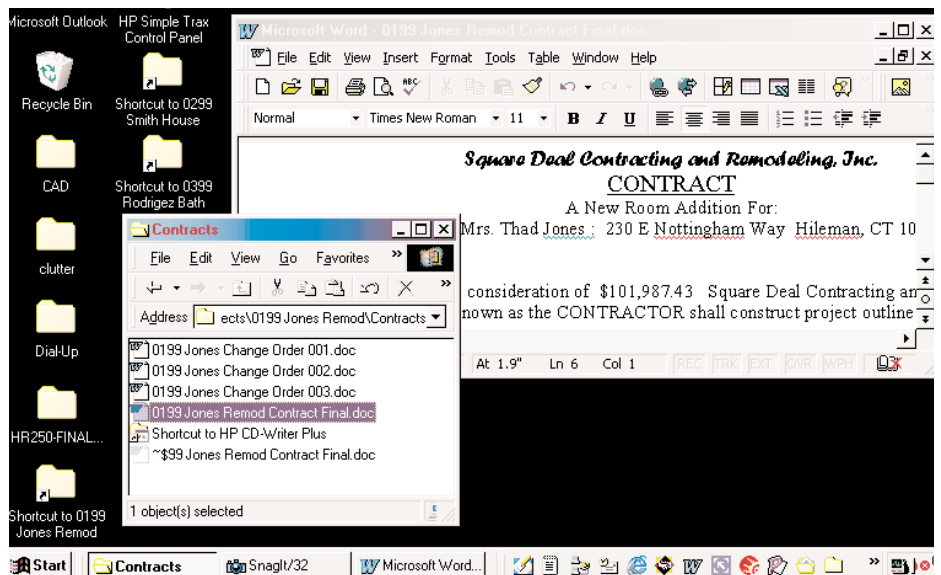


Figure 5. Clicking on the Jones folder shortcut (lower left of screen), then on the Contracts folder opens a window displaying a list of files (foreground). Double-clicking on a file automatically launches the program in which the file was created — in this case, a word processor (top right of screen).

should all be nested inside a new “master” folder with a name that make sense — “1999 Projects,” for example.

To begin, open My Documents on your desktop, right-click in an empty area of the window, and follow the procedure already described to create the “master” folder named “1999 Projects.” Double-click the new folder and within it create a folder named after a project, such as “0199 Jones Remod.” Double-click to open the Jones folder, then create a series of new folders, one for each type of document you’ll need for that project: “Letters,” “Proposals,” “Drawings,” “Contracts,” “Change Orders,” and so on (Figure 3, previous page).

This hierarchy of folders will keep your data files organized by job. Now, instead of just letting your programs save files all over your hard drive, you can put all files of the same type for a given project in the appropriate folder. Every time you create a new document in a program — a contract for the Jones job, for example — immediately select “Save As” from the File menu, and navigate first to the Jones project, then to the “Contracts” subfolder (Figure 4, previous page). The contract will be saved with other documents pertaining to contracts for the Jones job.

Taking a Shortcut

You can make it even easier to find the files you need by creating shortcuts on the Windows Desktop that will take you directly to your active project documents. To create a shortcut for the Jones project folder, for example, open My Documents, then the 1999 Projects folder, then right-drag — click and hold with the right mouse button — the Jones folder icon onto the desktop. When you release the mouse button, choose “Create shortcut” from the menu. A new icon will appear on your desktop — it should look like a manila folder and be labeled “Shortcut to 0199 Jones Remod” (Figure 5). Now when you want to work on a file for the Jones project, you won’t have to first open a program and search through folders to find the right file. Just double-click the Jones shortcut and the Jones folder will open in a new window. Double-click the file or folder you want to open and the appropriate program — word processor, spreadsheet, CAD program, or whatever — will launch automatically.



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