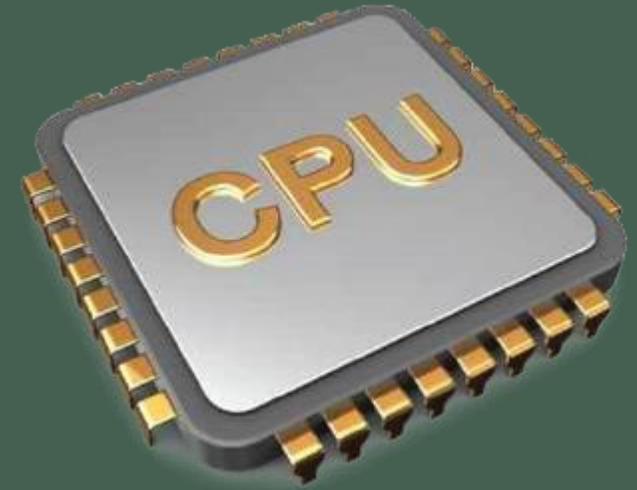


Windows 10 – Intermediate Course File Folder and Email Folder Organization



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Introduction

- **Signs that Your Computer is Poorly Organized**
- Your Desktop has over 40 icons on it.
- “My Documents” contains a mix of docs, pics, videos and/or music.
- You use the Windows’ Search tool whenever you need to find a file.
- You can’t find programs in the out-of-control Start Menu.
- You save all your Word documents in one folder, all your spreadsheets in a second folder, etc.
- Any given file that you’re looking for may be in any one of four different sets of folders.

Why Should I Organize my files into FOLDERS?

Can't I just find them with the Search Box?

- **Find files manually** – often faster and more accurate than Search Box
- **Find groups of similar files** – Example: special event photos, business documents, recipes, specific music genre
- **Move files to a new computer** – Upgrading to new PC, transfer work only files to 2nd computer
- **Synchronize files to other computers** - a way to quickly determine which files are to be synced and which are not. Surely you don't want to synchronize *everything*?
- **Choose which files to back up** - specify which files are to be backed up, and which are not. This is not possible if they're all in the same folder.

What to expect from this course...

As your instructor, I possess 28 years experience in file organization.

- When you are complete this course, you will be able to identify the best organizational method to suit your personal or business needs.
- You will learn the proper way to name, save and locate your files in an organized manner.
- You will learn how to reorganize your existing files and folders for efficiency.

Training Outline

- Lesson 1: Method of Folder Organization – Which is best for YOU?
- Lesson 2: How to begin with existing files
- Lesson 3: How to Properly Name Files & Folders
- Lesson 4: Move/Save Files to Folders

Lesson 1: Popular Folder Organizations Methods

Everyone has their own favorite methodology of organizing and filing, and it's all too easy to get into "My Way is Better than Your Way" arguments. The reality is that there is no perfect way of getting things organized. YOUR perfect way is what works for YOU!

- 1. Organize by File Type
- 2. Organize by Category
- 3. Organize by Date

Whatever method you choose, use it when naming folders AND files – Consistency is the KEY!

Lesson 1: Determine Which Method is Right for You

- ORGANIZE BY FILE TYPE – separate folders for each (.docx, .jpg, .xlsx, .mp3, .pdf, .ppt, etc.)

Organizing by File Type may cause your files for a specific event or purpose to be split into several folders.

Example: Hawaii Vacation - photos (.jpg), plus a journal of the adventure (.docx), plus your itinerary in Excel (.xlsx), you result in three separate folders for one trip.

But, this method may work best for your needs. It is a personal choice.

Lesson 1: Determine Which Method is Right for You

- ORGANIZE BY DATE

In this method, all files will contain the date, then category, then topic. This method is used for sorting purposes when the most important aspect of the file is the date it was created (not date modified).

For example: **161008-seminar-beginning computer skills-2 notes.docx** informs me that the file was created on October 8, 2016 and contains the notes for the seminar titled Beginning Computer Skills-level 2.

Since I conduct this seminar at various dates, and I edit it often, the date is most important. As I create many dated versions, they will sort automatically by date.

Lesson 1: Determine Which Method is Right for You

- ORGANIZE BY CATEGORY (Documents, Pictures, Videos, Music, Downloads)

Each category can contain multiple FILE TYPES. For example: The Documents Category can contain documents from Word, Excel, PowerPoint, WordPad, Open Office, Adobe PDF, etc. Each is a different File Type, but all are documents.

Likewise, the PICTURES category can contain .jpg, .gif, .bmp or any image file. The Videos, Music and Downloads can contain a wide range of file types all within their categories. This method is the most descriptive and easiest for relocating your files.

Lesson 1: Design Your Folder Tree

Example of Organization by Category Method

Each folder is a category, and some folders are a category inside a category. This is the most popular form of organization.

Each folder can contain any File Type.

- Documents
 - Business
 - Proposals
 - Contracts
 - Personal
 - School
 - Budget
- Photos
 - Vacation
 - Family
 - Pets
- Music
 - Jazz
 - 70's
 - Moody Blues
 - Sometimes I sleep
 - The Best of
- Downloads
 - Games
 - Programs

Lesson 1: Wrap-up

- Consistency is the key!
- Consider what type of information you store in your computer
- What is most important to you?
 - File Type
 - File Category
 - File Date
 - Combination of these methods?
- Name your Folders in a logical and descriptive manner

Objectives

Lesson 2: Where to Begin in a Sea of Disorganization?

- This Pc
 - Documents
 - Archive
 - Downloads
 - Archive
 - Music
 - Archive
 - Pictures
 - Archive
 - Videos
 - Archive

The first step is to clear the clutter. For each EXISTING folder, create a SUB-FOLDER titled ARCHIVE.

To create a Sub-Folder, right click on the main folder (example: Documents folder) and select NEW FOLDER from the menu. When the new folder appears, immediately type the desired folder name. Press Enter Key. Congratulations! You have now created a sub-folder titled ARCHIVE!

Next, determine which files are no longer important (but you still want to keep) and CLICK-N-DRAG them into the ARCHIVE folder. Don't worry, you won't lose them. You are just relocating them to a sub-folder so they won't be visible each time you open the main folder.

Objectives

Lesson 2: Analyze Existing Sub-Folders for proper content

- This Pc
 - Documents
 - Archive
 - Downloads
 - Archive
 - Music
 - Archive
 - Pictures
 - Archive
 - Videos
 - Archive

If you have any sub-folders that you already created in the past, they should be analyzed to see if the contents match your chosen organizational method.

If organizing by date, a sub-folder for 2016 should contain ONLY files created or updated in 2016.

If organizing by Type, review the folder contents for out of place files.

If organizing by Category Method, make sure the folder's descriptive name matches all the files contained therein

Objectives

Lesson 2: Analyze Existing Sub-Folders Names

- This Pc
 - Documents
 - Archive
 - business
 - Downloads
 - Archive
 - Games
 - Screen Savers
 - Music
 - Archive
 - 70's rock
 - Pictures
 - Archive
 - Vacation
 - 2015
 - 2014
 - Videos
 - Archive

Make sure all the first level of sub-folders have descriptive names to match your organizational method. To rename a folder: Right Click the folder name, select Rename from the menu, type the new name.

The subsequent sub-folders sort by date if needed. See Pictures category on left.

Most important – review your files. Determine what sub-folders are needed. But don't go crazy with too many sub-sub-sub-sub-sub- folders! Or, you will defeat the purpose of organization. The idea is to make finding your files fast and easy.

Lesson 2: Wrap-up

- Archive old unneeded files (you can review these for deletion later)
- Verify you have proper folder names and that the files contained therein match the folder title.
- Move the incorrectly located files into the main category folder. You will relocate them into the proper folders as you proceed with organization.
- Rename generic file names to be more descriptive.
- Be consistent in your Folder naming method

Objectives

Lesson 3: Rules of Naming Files and Folders

What you name your files and folders is exceptionally important to the entire organizational process.

Take care to consider a name that best describes the contents, while remaining as brief as possible.

Lesson 3: What constitutes a “proper” name

- 1. Standard rules to names
- 2. Unique names
- 3. Descriptive
- 4. Consistent naming style - Easy to scan the list to locate file
- 5. Optional - Include the date in the name

Name Characteristics

- #1 – Standard Rules
 - All lowercase letters
 - Use hyphen (dash) to separate descriptors (date, category, version)
 - Use underscore to separate words (use instead of space bar)
 - Try to limit names to 60 characters (less is better) While Windows will accept up to 270 characters, this may cause issues with several data backup services. Try to stick to short and descriptive names.

Name Characteristics

- #2 UNIQUE – No two files should have the same name, even if stored in different folders.
- To save multiple versions of a file: simply add -1 to the end of the file name to indicate revision #1. (be sure to delete any unwanted files when finished with the revisions)
- Example: A revision of document titled 2016-budget.docx could be named 2016-budget-1.docx. If revised again, it would be titled 2016-budget-2.docx.

Name Characteristics

- #3 DESCRIPTIVE – THE NAME SHOULD REFLECT THE FILE CONTENTS
- Avoid naming your files document1.docx, spreadsheet1. xlsx, song1.mp3
- Instead of “resume.docx”, use “resume-jdoe-2016-inland_corp.docx”
- If you have more than one resume, they will list in a group together, organized first by “resume” then by name, then date, then who the resume was submitted to.

Name Characteristics

- #4 CONSISTANT NAMING STYLE
- What ever method you choose, stick with it!

When naming the file, consider what is the most important word in the name. Start the file name with that word.

Example: 2016-john stevens race results.docx OR
 johnstevens-2016_race_results.docx OR
 race results–2016–john stevens

Name Characteristics

- #5 – Optional - Add the date to the file name.

Sorting by actual file date only tells you when files were last updated, and that's unlikely to be the primary thing you want or need to know.

Example: 2012 medical records stored in a file simply titled “medicalrecords.xls” along with others such as “medicalrecords-1.xls and medicalrecords-2.xls will not allow you to find your 2012 records quickly. Instead, name them medicalrecords2012.xls, etc.

It is best to add the date to file name and not just place it into a folder with the date. The file may be removed from the organizational folder and emailed, saved on memory key or other location. It still needs a proper identifying name.

Lesson 3: What constitutes a “logical & beneficial ” name

- 1. Descriptive
- 2. Brief as possible
- 3. Matches your organizational method
- 4. consistent to the rest of your file naming style

Lesson 3: How to Rename an Existing File or Folder

- 1. Right Click the File Name
- 2. Select RENAME from menu
- 3. Type the new name
- 4. Press ENTER key

Objectives

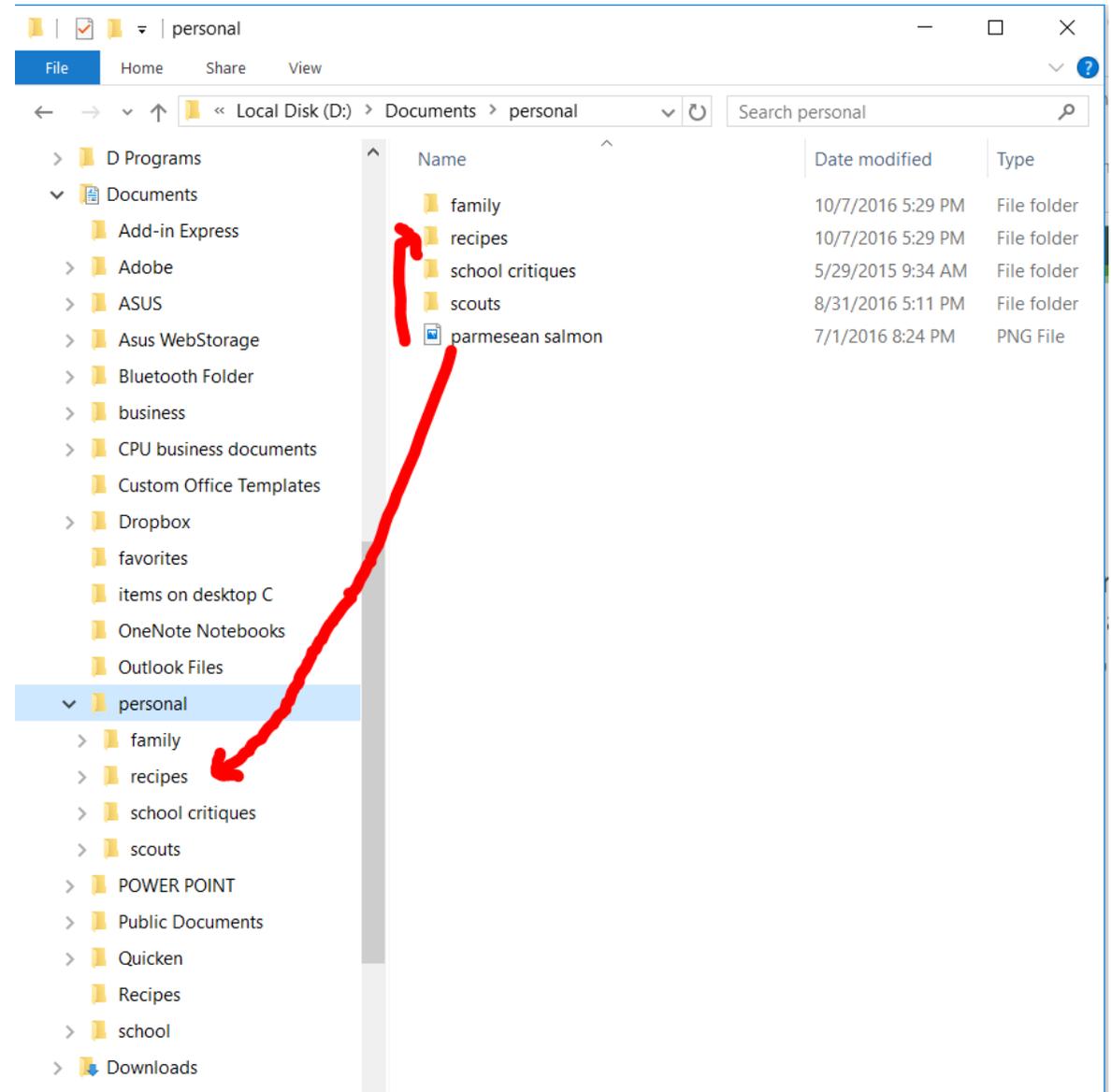
Lesson 4: Moving Existing Files & Folders to Proper Locations

Moving your files is as simple a CLICK and DRAG.

1. Open FILE EXPLORER
2. Expand the list on the left to reveal the Destination Folder.
3. Click on the Origination Folder on the left side (the folder you want to move a file or sub-folder FROM)
4. If necessary, continue to expand the folders on the left until you see the file you want to move displayed in the window on the right.
5. Click and Drag the file from the Right to the Destination folder on the Left. Release the mouse button. Done!

Lesson 4: File Explorer

- You can Drag & Drop files and folders into any other location that is logical and practical.
- In this example, my file “parmesean salmon” belongs in the folder above it. I can either drag it straight up, or to the left. They are the same destination folder.



Lesson 4: Wrap-up

- Moving files and folders is easily done with Click-and-Drag.
- Be sure you pause on the destination folder briefly before releasing the mouse. This will allow you time to confirm the proper folder has been selected.

Summary of Training

- Lesson 1 – Choose the best organization method for YOU
 - Lesson 2 – Move the old inactive clutter files out of your way - ARCHIVE
 - Lesson 3 – Name your files and folders wisely
 - Lesson 4 – Move your files and folders to the proper location.
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- Final notes: The use of the Archive Folder will allow you to set aside older files and organize just what you are currently using, allowing you to start organizing immediately. You can return to the Archive Folders at any time to move files out and into their permanent folder. No rush – you haven't used those file in quite a while anyway. 😊



EMAIL

Program Choices & Features

CREATE MAIL SUB-FOLDERS

It is wise to organize your email in a system that is local for YOU. There is no one right way.

Best Advice: create sub-folder titles that describe the contents of the folder. If necessary, create multiple levels.

Example of good structure

- >Inbox
 - > Personal
 - Medical
 - Financial
 - Legal

Example of poor structure

- Inbox
 - Medical
 - Financial
 - Legal

The first choice allows you to shrink the contents of the Inbox sub-folders, or even just the contents of the Personal Folder.

CREATE MAIL SUB-FOLDERS

- Right Click on the main folder name – example: Inbox
- Select NEW FOLDER from menu
- Type desired name of new folder – make it descriptive but brief
- Press Enter (or just click away from the text box)

- You can now hide or show the sub-folders as you wish by clicking the > to the left of the main folder.

- It is wise to create an ARCHIVE folder, with sub-folders for each year to store your VERY old messages.



FILE ATTACHMENTS

Regardless of the Email program you are in, File Attachments you receive are best saved to your hard drive, inside the folder best suited.

PHOTOS - are best saved in the PICTURES library folder on Drive C. You can create sub-folders inside of Pictures folder to better match the content of the photo. Such as Pictures/christmas/2016.

DOCUMENTS – are best saved in the DOCUMENTS library. You can create sub-folders inside of Documents folder to better match the content of the photo. Such as Documents/email-attachments/2016.

ORGANIZE YOUR MESSAGES

Now that you have organizational folders created, it is time to move your messages into the proper folders.

Simply left click and drag the message to the folder.

Tip: to grab a group of files to move, that are all in a successive order, CLICK on the first file, then SHIFT CLICK on the last file in the group.

Tip: to either select or un-select individual files, use CTRL CLICK

SUMMARY OF EMAIL LESSON

- ❖ There is not right or wrong email program. It is a matter of personal choice
- ❖ Most important factor is the TYPE of email account: POP, IMAP or WEB
- ❖ Of the free email programs available, Mozilla FireFox has the most features
- ❖ If using your email primarily for business, Outlook may be the right choice
- ❖ Webmail is less private and more subject to being hacked
- ❖ To make a sub-folder, Right Click on the main folder name, select “new folder”
- ❖ To save an attachment, Right Click, select “save attachment” and direct it to save in your desired location.

Thank you for participating today!

- I sincerely thank you for attending. I will email you a survey next week and would like our honest feedback on this course. I grow and improve only through your comments.
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