File-Ex 95 (tm) Help Contents

Note: This is a Beta version, so this help file may be a little rough and may still contain references to the older (Windows 3.1) version.

Please see the README.TXT file for the latest Beta notes.

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Installation

Windows NT users: This version of File-Ex <u>will not work</u> for Windows NT -- <u>do not attempt to install!</u> Contact <u>Cottonwood Software</u> for information on the proper version for your system.

If you're not familiar with File-Ex, please read through the <u>Overview</u> section, either now or after installation.

To install File-Ex, run SETUP.EXE from Windows:

- 1. Windows 3.1: From the Windows Program Manager, select File, Run...
 - Windows 95: From the Start menu, select Run...
- 2. In the Run Command Line box, type d:\path\SETUP, where 'd' is the letter of the drive and 'path' is the directory where the File-Ex files are.

For example:

C:\FILEEX\SETUP

- 3. Follow the instructions that appear on the screen.
- 4. After File-Ex installation is complete, it will need to validate some files. This will happen automatically the first time File-Ex is invoked, so you don't need to do anything special for this to happen.

Moving File-Ex after installation

The files that are installed in the selected program and data directories may be moved to a different drive or different directories, but if you do so, you must also do 2 things:

- 1. Change the path settings in FILEEX.INI to reflect the new location. (This file is in your Windows directory -- probably c:\windows.)
- 2. Exit and re-start Windows after the INI file is changed.

For further technical information about File-Ex installation, please refer to the README.TXT file.

About the Evaluation Period

File-Ex is Shareware. This means that you are free to try it out for **30 days**. It will be fully functional during that time, so you can try all of its functions.

After using it for 30 days (not necessarily calendar days, but when it's been used on 30 different days), some of the functions will be unavailable. You will still be able to use the basic functions like Copy and Delete, but the advanced functions (like Find and MakeDir) will not be available unless you purchase the program. In addition, the recent file and directory lists will be removed, and the File-Ex program function to learn new dialogs will be disabled.

Purchasing File-Ex

Making a Copy of File-Ex

Shareware works best when you 'share' it with other people! If you like this program, we would appreciate it if you spread it around. Give copies (of the shareware version only) to friends and coworkers, or even upload it to your favorite BBS.

Please only distribute the original compressed (.ZIP) file that you received File-Ex in. This is the only way to have the complete file set needed to install File-Ex, since the File-Ex directory after installation does not contain all of the necessary installation files.

Note: If this is a purchased (registered) copy, please DON'T distribute it! The registered copy contains your registration key file, and giving this to someone else is illegal. Please only distribute the shareware version!

Distribution by Vendors, BBS's, etc.

Commercial vendors please refer to the vendinfo.diz file for complete details. If these files are not present, please contact Cottonwood Software for a replacement copy.

Purchasing File-Ex

The File-Ex evaluation version is fully functional for 30 days of use. After that, some of the advanced functions will be unavailable unless you purchase File-Ex. This is the 'Try Before You Buy' concept of shareware -- File-Ex is not free!

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Point your Web browser to http://www.cottonwoodsw.com

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Site Licenses and Multiple User Pricing

Technical Support

Site Licenses and Multiple User Pricing

File-Ex prices for multiple users (computers):

For 2-3 users: \$20.95 each For 4-6 users: \$17.95 each For 7 or more users: \$14.95 each

(These include a disk for each user)

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20- user licenses are available for \$199.95

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Internet: **75264.1630@compuserve.com**

Mail: Cottonwood Software, P.O. Box 6546, Leawood, KS 66206 USA.

Click here to get a printed Order Form.

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Point your Web browser to http://www.cottonwoodsw.com

Any questions about the status of the shipment of the order, refunds, ordering options, product details, technical support, volume discounts, dealer pricing, site licenses, etc., should be directed to Cottonwood Software (see <u>Technical Support</u>).

Disabling File-Ex for a Specific Program

If you find that File-Ex interferes with a particular program, you may want to disable File-Ex for that program permanently. This will disable the File-Ex enhancements for all dialogs for that program, every time it is run. The method of disabling depends on whether the program is using File-Ex automatically (through commdlg.dll), or whether File-Ex has learned about the program (because it didn't use the Windows common dialogs).

If you're not sure which method is being used, first try disabling the File-Ex program by clicking the 'Enable File-Ex for Trained Dialogs' menu item of the File-Ex icon's system menu. If the program still appears to use File-Ex, then it must be using the automatic method (Common Dialogs).

Disabling a Trained File-Ex Application

The only way to permanently disable a 'Trained' application is to delete it from the File-Ex application list. Select <u>Configure Applications</u> from the File-Ex icon's system menu, and find the dialog entry (or entries) for the program in question. Select one dialog at a time and click the Delete button. To re-enable these applications, you must re-teach File-Ex to recognize it. See the section <u>Teach File-Ex new Applications</u>.

Disabling File-Ex for a "Common Dialog" Application

Up to 10 different programs that use the Common Dialogs may be disabled. (If you have even one that causes problems, please <u>contact Cottonwood Software</u> so that we can solve the problem for good!)

To disable File-Ex, first disable it temporarily by holding down the Shift key as you click on the menu item or button that brings up the Open or Save dialog. When you exit that dialog (click Cancel or OK), File-Ex will ask you if you would like to disable it permanently (unless it's already been done). If you click Yes, File-Ex will save that program's name and will not affect that program any longer.

Note: The Shift key is used by default. This can be changed to the Control key in the <u>Dialog</u> <u>Configuration</u>, in case the Shift key is used for another purpose, such as in Netscape Navigator.

Re-enabling File-Ex for a program that uses the Common Dialogs

The disabled program names are kept in the commex.ini file, in your Windows directory. To re-enable a program, you must edit this file manually using Notepad or other text editor. (Do NOT use Write or any word processing program!) This information assumes that you are familiar with changing INI files -- if not, please find someone who is, or call Cottonwood Software for assistance if you are not comfortable with the instructions below.

In the first section, [CommEx], there will be a setting *NumExcludes*, and a number of *ExcludeX* settings, where X is a number from 1 to 10. The name after the *ExcludeX* is the program's internal name, typically an abbreviated version of the name you're familiar with.

To re-enable a program, you must delete that program's *ExcludeX* line, change the *NumExcludes* number to 1 less than what it is, and renumber the X's in the remaining *ExcludeX* lines to be contiguous from 1 to the *NumExcludes* setting.

Warning! If this is not done properly, the results are unpredictable! If you are in doubt, then set *NumExcludes* to 0, and go through the disabling steps for any remaining programs that you want to

disable.

Disabling File-Ex Temporarily

You can disable the File-Ex enhancements from being applied by holding the Shift key down as you click on the menu item or button that brings up the Open or Save dialog.

(Note: The Shift key is used by default. This can be changed to the Control key in the <u>Dialog</u> <u>Configuration</u>, in case the Shift key is used for another purpose, such as in Netscape Navigator.)

For example, in Notepad you would select the File menu item, then hold the Shift key down while clicking on Open. The original Open dialog will appear with no File-Ex enhancements.

This can be useful as a workaround if File-Ex does not operate correctly with some application. (If this happens, please contact us and we will try to fix the problem!)

Note: The Shift key only disables the enhancements added to the Common Dialogs. If the application has been taught to File-Ex because it's not modified automatically, then the Shift key will disable the enhancements, but File-Ex will still be intercepting the dialog and using the Windows common dialog instead of the application's own dialog. To temporarily keep File-Ex from intercepting any dialogs, you must either close the File-Ex program, or click on the 'Enable File-Ex for Trained Dialogs' menu item in the File-Ex system menu.

If you do find that File-Ex interferes with a particular program, you may want to disable File-Ex for that program permanently. See <u>Disabling File-Ex for a Specific Program</u>.

Technical Support and Company Contact Information

We will gladly answer any questions and help you with File-Ex problems during the 30-day free evaluation period. (After the free trial, we will still answer 'simple' questions, but may, at our discretion, require you to purchase File-Ex before providing technical support.)

Any suggestions, comments, support questions and bug reports are welcome and encouraged! All questions will be answered promptly. This is offered to both registered and unregistered users because we appreciate the assistance in making the program better!

For support, contact Cottonwood Software by phone, fax, mail, or E-mail. (E-mail is preferred, and will get a fast response.)

Mail: Cottonwood Software

P.O. Box 6546

Leawood, KS 66206-0546

Phone: (913) 663-3022 FAX: (913) 663-3747 CompuServe: 75264,1630 America Online: CottonwdSW

Internet: 75264.1630@compuserve.com WW Web: http://www.cottonwoodsw.com

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Point your browser to: http://www.cottonwoodsw.com

Troubleshooting

While File-Ex has been tested on many systems and in many situations to fine-tune the installation process and the program itself, there may still be unexpected problems.

If things work fine in general, but the Open or Save dialog of some application does not look or work right, try <u>disabling File-Ex temporarily</u> to see if File-Ex is causing the problem. If it is definitely File-Ex causing the problem, please contact us and we will attempt to solve the problem.

If things don't seem to work at all, or if File-Ex doesn't seem to be installed, then take a look at the sections below. If these don't fit the problem (or don't solve it), contact us for help. We will want to look at the FILEEX.LOG installation log file, which is created in your Windows directory during installation, so please have this available (or send it along with your E-mail support request if possible).

If you get an error message when trying to use File-Ex:

If you get system errors (Exception Error, for instance), then you may have more than one copy of COMMDLG.DLL on your system (see below). If this is not the case, or if the problem persists, call for support.

If you don't see anything different in your Open or Save dialogs

Make sure File-Ex is running. You should see the icon in the taskbar. If in doubt, start it again (if already running, it will simply display the About dialog).

If you're sure that File-Ex is running, then it could be that the application you're using does not use the common dialogs in COMMDLG.DLL. Some programs, especially older ones and ones with unique requirements in their Open/Save dialogs, have internal custom dialogs that File-Ex will not be automatically added to. You may need to Teach File-Ex about this application to get the File-Ex functions.

Any of the above, or other problems

A common problem is that there is more than one copy of COMMDLG.DLL on your computer, and Windows is getting confused about which one to run. This can cause File-Ex not to appear, system errors, printing problems, or any number of odd things to happen.

After making sure that there is a COMMDLG.DLL in your Windows System directory (usually C:\ WINDOWS\SYSTEM), search your hard disk (and network drives) for any other copies of COMMDLG.DLL. Any other copies should be deleted, or at least renamed (to COMMDLG.SAV, for instance).

If some of the buttons at the bottom are greyed out (unusable)

This means that your free evaluation period has run out. To re-enable these functions, you must purchase File-Ex.

If you are in a Browse dialog (from the File-Ex Move or Copy functions), then the Move and Copy buttons will be disabled to avoid going in a loop. This is a normal function.

If you see the recent files/directories lists, but no file management buttons

This is an option for the Windows 95 Explorer-style common dialogs. If you want to include the file management buttons on these dialogs, set the option in the dialog configuration.

If the recent files/directories lists do not appear

This means that your free evaluation period has run out. To re-enable these functions, you must purchase File-Ex.

If you have trouble training File-Ex for new applications

If the training session does not seem to work, then the application could have very unusual characteristics that don't work with File-Ex. We would like to know of such cases. Also, you may want to review the sections on Teaching File-Ex and <a hre

Other problems

If you encounter any other problems, please contact us for <u>support</u>. We will gladly answer any questions and help with problems during the 30-day free evaluation period. After the free trial, we will still answer 'simple' questions, but may (at our discretion) require you to order before providing technical support.

Removing File-Ex

If you encounter insurmountable problems, or just don't like the new functions that File-Ex provides, you may need to un-install it.

A Remove program is provided with File-Ex for your convenience, and should be in your File-Ex program group. If it's not, you can also run Remove directly off of the distribution disk (assuming it's unZipped).

The Remove program gives you two options: Partial and Complete. Partial will leave the configuration files (.INI and .DAT) intact, in case you re-install. Complete removal will also delete those.

The Remove program is similar to the Setup program -- it must exit to DOS in order to copy the original Windows commdlg.dll back in place. Note that there are 3 files which Remove will not delete: FILEEX.LOG and FILEEXR.LOG (Setup and Remove logs) are left in the Windows directory for troubleshooting reasons. Also, REMOVE.EXE cannot itself be removed because it's running at the time.

Manual Removal

If for any reason you prefer to remove File-Ex manually, or just want to know what it's doing, here's the procedure:

To un-install File-Ex:

- 1. Delete the File-Ex program group (or file folder in the Start menu directory tree).
- 2. Remove the File-Ex program item (icon) in the Startup group/folder, if present.
- 3. Delete all files in the File-Ex program directory.
- 4. You may also delete these files to completely remove File-Ex:

COMMEX.INI in your Windows directory

FILEEX.INI in your Windows directory

FILEEX.LOG in your Windows directory

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File-Ex Overview

How it Works

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Teaching File-Ex New Application Dialogs

Technical Information (Why some don't work right)

Word and Excel Configurations

CommEx DLL

The CommEx DLL is the portion of File-Ex that modifies applications that use Microsoft's commdlg.dll. It will be activated whenever an application attempts to call the Microsoft DLL to get a filename for opening or saving. This normally only works if the application was written to use the Windows common dialogs.

How File-Ex Works

File-Ex consists of two parts:

- 1. The CommEx DLL, which recognizes the "Common Dialog" file dialogs used by commdlg.dll and adds the File-Ex enhancements.
- 2. The File-Ex Program database, which can capture other file dialogs and make them use commdlg.dll, thus enabling all of the File-Ex features.

The CommEx DLL

Any program that was written to use commdlg.dll will now be intercepted by the CommEx DLL, which contains all of the added functions for the File dialogs. You may be familiar with the CommEx DLL portion as a stand-alone program, before File-Ex was created.

Once File-Ex is running, there is nothing else you need to do to activate this portion. It recognizes any open and save dialogs opened by Microsoft's commdlg.dll, so it can add its functions seamlessly. It will be activated whenever an application attempts to call the Microsoft DLL to get a filename for opening or saving.

Note: If you ever want to disable File-Ex for a program that uses commdlg.dll, you can <u>Temporarily</u> <u>Disable</u> it by holding the Shift key down while bringing the open or save file dialog up.

While most applications do use the Windows common dialogs, there are some that don't either because they have special needs in the dialog (such as Word for Windows), or they are older applications that were written before the common dialog DLL was widely used. To overcome this limitation, the File-Ex program was created.

The File-Ex Program database

The File-Ex program database is used to add the File dialog enhancements to programs that don't normally use commdlg.dll. It does this by recognizing when a program is opening a File dialog and then either replaces that dialog with the File-Ex version of the dialog, or adds a button to the program's dialog to invoke File-Ex manually.

File-Ex must first be <u>trained</u> to recognize a program's File dialogs. This is easily done, and should only need to be done once for each dialog that you want to add the File-Ex functions to. However, remember that the File-Ex program must be running for these non-common dialogs to have the File-Ex functions added.

File-Ex comes pre-trained for Word 2.0, Word 6.0, and Excel 5.0, the most common programs that need File-Ex. (More information on the pre-configuration)

The File-Ex program's icon was added to the File-Ex group (and optionally your startup group) during installation. This program must be running to enable File-Ex for the trained applications. Usually you will want to start File-Ex automatically when Windows loads -- if you did not choose this option during installation, you may do this at any time by adding the File-Ex program item to the Program Manager's "Startup" group.

The File-Ex program is always minimized (in the taskbar tray). To get to its menu functions, just right-

click on the icon once for the system menu, and you'll see all of the File-Ex program functions.

File-Ex can be <u>configured</u> in various ways for each application. You may need to experiment to find the best setup for each dialog.

If things don't seem to work right, check out the <u>technical information</u>.

File-Ex Dialog Functions

Buttons

The additional buttons on the dialog should be self-explanatory. The <u>Copy</u> and <u>Move</u> buttons are used to copy or move a file. First select the file (or type the name in the filename box), then press the button.

The <u>Delete</u> and <u>Rename</u> buttons work the same way for files, but may also be used for directories *in the old-style dialogs*. (File-Ex cannot delete or rename folders in the explorer-style dialogs -- you can use the right mouse button to do that.) To act on directories, click on the directory to delete or rename in the directory list, then press the button. (If you do anything else before pressing the delete/rename button, it will not know that you want to act on the directory instead of a file.)

The <u>Find</u> button brings up a dialog for designing the search criteria and starting the search. When the search is done, you can select one of the files in the 'found' list, and press 'Done' to go back to the open/save dialog with that file selected (and with the drive/directory changed to where the file is).

The <u>MkDir</u> button is used to make a new directory under the 'current' directory (the one that is currently open, not one that is highlighted in the directory list). After the new directory is made, the dialog will automatically change to that directory.

The <u>File-Ex</u> button brings up information about the program, and also presents functions to <u>Configure</u> the appearance of the File-Ex dialog and access various help information.

Information Line

Below the buttons is the file information line. Whenever a file is selected in the file list, its size, time, and date will appear here. If the file is read-only, then it will show 'Read-Only' next to it.

Recent Files and Directories

Below the file information line are two lists -- one for recent files opened or saved, and one for recent directory paths used for those files. Just click on the box or down-button to open up the list, and then click on the file or directory you want. These make it easy to get to the last several files you've worked on, without having to navigate through the directory tree, or even remember where they are. Each list contains up to 25 of the most recent files used for the current application (in order with the most recent at the top), followed by up to 25 of the most recent files used by <u>any</u> application. So if you work on a file in one application and need to access it in another one, it will still be just a couple clicks away!

Note that only files accessed through these File-Ex dialogs will be remembered here. For example, if an application is started with a file already opened (from a drag-drop operation, for instance), then that file will not appear in the list.

File-Ex Remembers the Last Directory Used

Another feature of File-Ex is that since it remembers the last directory used for each application, it can automatically switch to that directory when the application is used again. Some applications already do this, or specify an initial directory. However, any application that normally defaults to the 'current directory', which is usually the program's own directory, will now default to the last directory used. Although the last path used is always available in the Recent Directories list anyway, this saves a couple clicks of the mouse most of the time.

This auto-path-switching function defaults to 'on', but may be switched off if desired -- see the <u>Configuration</u> section.

File-Ex Program (Menu) Functions

File-Ex runs as a taskbar tray icon in Windows 95 -- you should see a small File-Ex icon at the far right of the taskbar. Right-click on this for the main (system) menu, or double-click on it to bring up a dialog with configuration, help, & option functions.

The following functions are found in the File-Ex program's system menu.

Learn New Dialog

This function takes you step by step through training File-Ex to recognize a new application dialog. See <u>Training File-Ex</u> for more information.

(Note: If you have not purchased File-Ex, the Learning function is disabled after the 30-day trial period!)

Configure Applications

This allows you to configure how File-Ex works with the trained applications. See <u>Configuring Applications</u> for more information.

Configure Dialog Appearance

This configures the appearance of the File-Ex open and save dialogs. See <u>Configuring Dialogs</u> for more information.

Enable File-Ex for Common Dialogs

This allows you to enable and disable File-Ex without actually closing the program. Note that this only disables the applications that are automatically modified (use commdlg.dll), not the ones that require training the File-Ex program. See How File-Ex Works for more information on the difference, and Disabling File-Ex for information on how to disable specific applications.

Enable File-Ex for Trained Dialogs

This allows you to enable and disable File-Ex without actually closing the program. Note that this only disables the applications that require training the File-Ex program, not the ones that are automatically modified. See How File-Ex Works for more information on the difference, and Disabling File-Ex for information on how to disable specific applications.

Help

This opens the File-Ex help file (the one you're looking at now) to the table of contents.

About

This opens a dialog showing the File-Ex program version, etc., and also has buttons for Configuration

and Support information. This dialog is also shown if you double-click on the File-Ex icon.

File-Ex Dialog Configuration

To configure the appearance of the File-Ex enhanced open/save file dialogs, bring up the configuration dialog by pressing the 'File-Ex' button on the dialog, and from there press the 'Configuration' button. Any changes made will be saved away to be used as defaults. Note that some of the changes will not affect the currently open dialog -- you must close the open/save file dialog and re-open it to see the changes.

Use 3-D style controls: By default, File-Ex gives the open/save dialogs a '3-D look' by using a grey background ad controls. If for any reason this causes problems with one of your applications, or you have another program that already does this, you can uncheck this box to keep File-Ex from doing it. (Even with this turned off, applications that normally use the 3-D will still use 3-D for the File-Ex dialogs.)

Automatically Center Dialogs: As a visual convenience, File-Ex can atomatically center the file dialogs when they appear. This keeps them from popping up in an unexpected corner, etc. If this interferes with any program's operation, you may turn it off.

Narrow font selections: If you prefer the narrow text font in more than just the information line (to look more like modern application dialogs), you can turn it on for various parts of the dialog. In some cases, using narrow text for the buttons will allow the dialog to be smaller, and selecting narrow text for the recent file/directory lists will allow longer names to be displayed without abbreviating the path.

Note that these default to Narrow so that it can fit the necessary text easily. If this is turned off, the dialog will be larger to accommodate the maximum length of text that can appear here.

of Recent files/directories shown: By default, File-Ex displays up to 25 recent files and directories used for the current application, followed by up to 25 for all applications (excluding duplicates). On slower computers, this can result in a noticeable delay when changing directories or drives (in the list boxes), as it must re-parse the recent file/directory lists to be relative to the current directory and drive. If this delay is annoying, reduce this number to 5 or 10, as appropriate. (For example, if set to 5, it will show 5 for this application plus 5 for all applications.)

Note that File-Ex always keeps track of the last 25, even if they are not listed, so you can keep the 'shown' number low most of the time, and increase it if you need to find something farther back. Unlike some of the other configuration options, the dialog's list will change immediately, without having to close it and re-open it.

Make Paths in history relative to current path: By default, File-Ex shows files in the recent files list with paths relative to the current path selected in the dialog. In other words, any files in the current directory will only show the file name; files in subdirectories of the current directory show only the subdirectory name and the file name; files in other directories show the complete path, etc.

While this often shortens the displayed name so that it fits in the list easier, it can also be confusing at times. You may want to turn this option off so that the entire path is always displayed. Unlike some of the other configuration options, the dialog's list will change immediately, without having to close it and reopen it.

Default to last directory used for each application: This option is used to turn off the feature that automatically switches to the last directory used for each application. Some applications already do this, or specify an initial directory. However, any application that normally defaults to the 'current directory', which is usually the program's own directory, will now default to the last directory used. You may need turn this off, however, if an application normally defaults to a more appropriate directory

depending on what you're doing. (With the Recently Used Directory lists available, you're only a couple clicks away from it anyway.)

Key to use for temporarily disabling File-Ex: This allows you to change the method of temporarily disabling File-Ex. Normally you hold the Shift key down while invoking the Open or Save dialog. Since the Shift key operation is known to be used for other functions in some programs (eg. Netscape Navigator), you can change the disable key to be Control (probably "Ctrl" on your keyboard), or none at all. If you change it to None, you can always return to this dialog from any program and change it back when you need to disable File-Ex for a program.

Add file management functions to Explorer-style dialogs: With this checked, the File-Ex file management buttons are added to the Windows 95 Explorer-style file dialogs (if the program uses Common Dialogs). This defaults to 'on' for convenience, but may be turned off if you are comfortable with the right-click functionality of Windows 95 and prefer to make the dialog smaller.

Configuring Known File-Ex Applications

This dialog shows all of the application dialogs that File-Ex has been trained to recognize. This dialog is available from the File-Ex icon's system menu (click once on the icon of the running File-Ex program.) From here you can do the following:

Edit Dialog -- lets you edit details about the way File-Ex works with a dialog. You can also edit a dialog entry by double-clicking on it in the list. See <u>Application Configuration</u> for more information.

Delete Dialog -- lets you delete an application dialog from the File-Ex database. Be sure you know what you want to do before doing this! If you delete one by mistake, you can press the Cancel button to abort the changes. (Cancel will not abort changes already 'OK'ed in the editing dialogs, though!) Once you press OK, the changes are saved to disk, and the only way to get it back is to re-train File-Ex for the dialog.

The Application Database File

All of the application configuration information is stored in the file FILEEX.DAT. This file will be in the "User Data Path" specified during Setup (usually the same as the program path). You will probably want to include this file in your normal backup routine, so you don't have to retrain File-Ex if something happens to the file.

File-Ex comes pre-trained for Word 2.0, Word 6.0, and Excel 5.0, the most common programs that need File-Ex. (More information)

Technical Information on File-Ex

What the File-Ex Program Does

The File-Ex Program was designed to make the file management functions available to applications that don't use the Microsoft Common Dialogs DLL (commdlg.dll).

In addition, if a program that already uses the Common Dialogs is trained to use File-Ex, you get the added benefit of being able to change the file types list, and to use long file names in Windows 95.

When File-Ex recognizes a trained dialog, it attempts to 'fool it' into thinking that the user is just entering a filename. There are several parts to this, and thus several ways things can go wrong if the program has unusual behavior.

If things don't seem to work right, check the topics below. Some of these can be checked by disabling File-Ex (see the <u>File-Ex Program Functions</u>) and going through the steps that File-Ex goes through. If it doesn't work manually, it probably won't work with File-Ex.

Regardless of how well File-Ex works in the 'Replace' mode, you should still be able to get the benefit of handy file management functions by Adding the File-Ex button to the dialog. (This can in fact be added to nearly any type of dialog, even if it's not a File open or save dialog.)

What File-Ex Needs to Work Well

File Name Input

The most critical item is the dialog's File Name input (or edit) box. When you select a file in the File-Ex dialog, File-Ex stuffs the full path and file name into the edit box, and then simulates the user pressing the Enter key (in some cases -- see below). With most dialogs, this works. However, some applications were written differently. They may not accept the full path with the file name, or the path may be too long for its input box. In some cases, the dialog requires you to actually click on the file name in a list rather than pressing Enter after typing it. Also there are some applications that use a non-standard edit box for the filename, and File-Ex cannot read or write to it at all (Harvard Graphics for Windows is on known to have this problem).

Another common problem is that the text in the application's original dialog (at the time File-Ex is invoked) is not a valid file name or mask string. In this case, the File-Ex window will not even show up, and you will be left with the original dialog. (An error message will let you know why.) The text in the file name edit box, either the default when the dialog is opened or what is there when the File-Ex button is pressed (if it's set up for "Add Button"), must be one of the following:

- 1. A valid DOS file name with or without the path.
- 2. A file mask with wildcards, like *.*, *.txt, *.??v, etc.
- 3. A list of file masks, separated only by semicolons (spaces are tolerated in some cases)

Enter = OK

Since File-Ex assumes that pressing the Enter key is the same as pressing OK button, this is another possible problem. This won't matter if you just Add the File-Ex button to the dialog, but it does matter if you select 'Automatically Open/Close File-Ex', or if you have File-Ex Replace the original dialog. You can test this yourself by typing a file name and pressing Enter.

Current Path = Dialog Path

When the File-Ex dialog opens (in the case of Add Button & not Auto-Open), it assumes that the current DOS directory path is the same as the one showing in the dialog. If this is not the case, things will work but you may end up in a different place when you open File-Ex, or when you get back to the original dialog.

File Types: training

When File-Ex is trained, it attempts to extract file types from the original dialog. For it to be successful, the original dialog must have a File Types list with each list entry being either a 3-letter extension (simplest case) or each entry having a recognizable file mask like *.txt.

If File-Ex does not recognize the entries, or if the original dialog doesn't have a list of types, you can manually enter the types when configuring the application.

File Types: problems when using File-Ex

There is also another problem with file types -- if the application needs to know which File Type list entry is selected from its dialog, then using 'Replace' or 'Add with Auto-Open' will not work properly because File-Ex doesn't attempt to select one of the file types. For example, Microsoft Word's Save As dialog has options in the File Type list to save a file in various formats. Word uses the type that the user selects *in its own dialog*, regardless of the extension given the file. However, File-Ex can't select a type in Word's dialog.

Therefore the only way to select a type other than the default "Word Document" is to go back to the Word dialog to select the type. With File-Ex configured as "Add button", that's no problem. With File-Ex configured as "Add button with Auto-Open", you can Cancel the File-Ex dialog to get back to Word's dialog, and then select the type. But if you configure File-Ex as "Replace dialog", then you can't get back to the Word dialog at all.

Note that this usually means that the application will save a file in its original format, not necessarily the default one in the File-Ex File Type list. For example: In Excel, if you open a text file (using the Import Wizard), then save the file using only the File-Ex dialog, then the file will be saved in text mode, even if you change the extension of the file! You must Cancel the File-Ex dialog and select the desired type in Excel's dialog to get the proper results.

Training -- Open the Dialog to Train

File-Ex is prompting you to open, or display, the dialog you want to teach it about. If this prompt window is in the way, you can move it around to get the desired dialog open by grabbing its caption bar with the mouse.

If you don't already have the application open that you want to train File-Ex for, that's OK -- go ahead and open it now. Then go through the normal process of bringing up the desired dialog, such as clicking on an 'open' button, or selecting Open from its File menu.

Note: <u>Don't</u> open the dialog <u>before</u> selecting "Learn new dialog" -- File-Ex needs to see it in the process of opening up <u>after</u> you put File-Ex in learning mode.

After you open the desired file dialog, click OK in the File-Ex prompt window. (You can also click Cancel if you change your mind.)

Complete Training Instructions

Training -- Click on the Dialog

The prompt is asking you to click anywhere on the Open or Save dialog that you opened, so it knows which dialog you want to teach it about.

You can click anywhere within the dialog window, but it works best if you click on the "white space" (or grey space) between controls in the dialog. (Some dialog designs make it difficult to figure out the owner of the controls within the dialog, so clicking on the controls may confuse File-Ex.)

If you click on the dialog but nothing happens, then File-Ex will not work with this dialog, probably because it has unusual characteristics that File-Ex cannot recognize. Please contact Cottonwood Software for support.

You can click the Cancel button in the File-Ex button to abort the training session.

Complete Training Instructions

Training - Edit or Re-Train dialog

This option is presented if File-Ex already has an entry matching the dialog you have selected.

If you select 'Edit', then the training session will be aborted and the configuration dialog will be shown for the matching dialog. You can make changes to the configuration here if desired. This should be selected if you really only meant to change configuration options for the dialog -- re-training is not necessary.

If you select 'Re-train', then the old definition for this dialog will be deleted and training will continue for a replacement definition. This should be selected if a previous training attempt did not seem to work, or if you believe that the wrong control was selected at some point during the training.

Caution! -- If you select 'Re-train', the old definition will be immediately deleted from memory!

Complete Training Instructions

Training - File Name Input Box

The **File Name** input box is where you usually type the file name you want to open. When the cursor is in this box, it usually turns into the "I-beam" editing cursor.

Click on that box now, and training will continue automatically.

If you're not sure where it is, look for a flashing vertical bar in one of the input boxes -- the file name input box is usually the one that has this flashing bar when the dialog opens.

Note: Although there is a 'Skip' option for the File Name input box, skipping this would defeat part of the purpose of File-Ex. You could still use it to do file management, but any file selected in the File-Ex dialog will not be automatically inserted in the application's dialog to be opened or saved.

Complete Training Instructions

Technical Information - How the File Name input box is used

Training - File List

The **File List** is the scrolling list of file names, usually right below the File Name input box.

Not all Open or Save dialogs have this, and it is not critical. If you don't see one, just click on the Skip button of the File-Ex training dialog.

Training - File Types List

The **File Types List** is usually a drop-down list box showing different file types, such as "All Files (*.*)", "Text Files (*.txt), etc. This is usually below the File List in dialogs that look similar to the Common dialogs.

In some cases, it may just be a list of 3-letter extensions, or perhaps just a list of file masks strung together, like *.txt *.doc *.asc.

File-Ex only uses this information to build its initial File Types list. You can add or change types later, during configuration.

Not all Open or Save dialogs have this list, and it is not critical. If you don't see one, just click on the Skip button of the File-Ex training dialog.

Training - Directory List

The **Directory List** is usually a scrolling list box showing either a directory tree structure or a list of directories under the current path.

Not all Open or Save dialogs have this list, and it is not critical. If you don't see one, just click on the Skip button of the File-Ex training dialog.

Training - Open or Save

If the dialog's title does not make it obvious whether it's an Open or Save dialog, you will be asked which one it is. Just click on the appropriate button.

Note: Most applications have open and save dialogs that look identical, and in many cases are identical except for the dialog name. You should still train File-Ex for <u>both</u> the open and save dialogs, however, so it can tell the difference and act accordingly.

The Open/Save setting determines how the dialog acts -- whether it checks for a valid file already existing, whether the file list is greyed out, etc. If the dialog is not strictly an Open or Save type of dialog, just consider how you want File-Ex to act during operation:

For Open dialogs, File-Ex will insist that the selected file (and any path entered) already exists before continuing. (Therefore if a Save dialog is configured as Open, then it won't allow you to save files with a new name!)

For Save dialogs, File-Ex will allow entry of non-existent files, but will still insist that the path already exists. In addition, the files in the file list will be greyed out (but can still be selected).

Training - Add or Replace

You are being asked if you want to Add a File-Ex button to the dialog or Replace the dialog with File-Ex. This is partially an issue of personal preference, but it can also make a difference in how well things work. It's usually best to choose Replace for Open dialogs and Add for Save dialogs, but either way you can change it easily later. See <u>Application Configuration</u> for more explanation of this.

Teaching File-Ex New Applications

Any application that does not use the Windows common dialog functions for file open and save dialogs can still use File-Ex, if you teach File-Ex to recognize that application's file dialogs.

In addition, if a program that already uses the Common Dialogs is trained to use File-Ex, you get the added benefit of being able to change the file types list, and to use long file names in Windows 95.

Note: Due to the enormous range of dialog configurations in applications, it's not possible to get File-Ex to work perfectly with them all. You will probably run into some that cannot be replaced by File-Ex, or that won't even accept the file name selected in the File-Ex dialog, but you should always be able to add the File-Ex button to at least get the benefit of the file management functions in File-Ex. (See <u>Technical Information</u> for more details.)

Open and Save dialogs: Most applications have open and save dialogs that look identical, and in many cases are identical except for the dialog name. You should still train File-Ex for <u>both</u> the open and save dialogs, however, so it can tell the difference and act accordingly.

To start the teaching process, select the "Learn new dialog" menu item from the File-Ex program's system menu. (Click once on the File-Ex program's icon when File-Ex is running to show the system menu.)

(Note: If you have not purchased File-Ex, the Learning function is disabled after the 30-day trial period!)

The Learning Session

File-Ex will prompt you to display the dialog you want to teach it about. If this prompt window is in the way, you can move it around (grab its caption bar) to get the desired dialog open.

If you don't already have the application open that you want to train File-Ex for, that's OK -- go ahead and open it. Then go through the normal process of bringing up the desired dialog, such as clicking on an 'open' button, or selecting Open from its File menu.

Note: <u>Don't</u> open the dialog <u>before</u> selecting "Learn" -- File-Ex needs to see it in the process of opening up after you put it in learning mode.

After you open the desired file dialog, click OK in the File-Ex prompt window. (You can also click Cancel if you change your mind.) The prompt will ask you to click anywhere on the dialog, so it knows which dialog you want to teach it about.

You can click anywhere within the dialog window, but it works best if you click on the "white space" (or grey space) between controls in the dialog. (Some dialog designs make it difficult to figure out the owner of the controls within the dialog, so clicking on the controls may confuse File-Ex.)

Note: If File-Ex finds a dialog in its database that matches the one you selected, then you will be given the option to either Edit the original one or Re-train File-Ex for it.

The prompt window will move itself underneath the file dialog (so you know it has found the right one), moving the dialog up if necessary. If there is not enough room on the screen for both dialogs, then the File-Ex training dialog will overlap the dialog being learned. You can move the File-Ex training dialog out of the way if necessary.

Now File-Ex will have you click on various controls in the dialog. When doing this, make sure the cursor

is within the requested control. (If you make a mistake at any time, just finish the learning session, delete the new entry, and start again.)

Control Identification

The **File Name** input box is where you usually type the file name you want to open.

The **File List** is the scrolling list of file names, usually right below the File Name input box.

The <u>File Types List</u> is the drop-down list box showing different file types, such as "All Files (*.*)", "Text Files (*.txt), etc. This is usually below the File List.

The <u>Directory List</u> is the scrolling list box showing either a directory tree structure or a list of directories under the current path.

If it isn't obvious what it wants at first, you should get the hang of it after a few times.

If the dialog does not seem to have one of the controls requested, just click on the Skip button of the File-Ex dialog. This may or may not affect how well File-Ex works with the dialog, depending on the circumstances. (See <u>Technical Information</u> for more details.)

Wrapping It Up

After the controls are identified, if the dialog's title does not make it obvious whether it's an <u>Open or Save dialog</u>, you will be asked which one it is. Just click on the appropriate button.

You will be asked if you want to **Add** a File-Ex button to the dialog or **Replace** the dialog with File-Ex. This is partially personal preference, but can also make a difference in how well things work. It's usually best to choose Replace for Open dialogs and Add for Save dialogs, but either way you can change it easily later. See <u>Application Configuration</u> for more explanation of this.

Finally it will tell you it's done -- just click on OK. The Application Configuration dialog will be shown, with all of the settings for the dialog just learned. You can change things here if you wish. We recommend adding the application's version number to the "Application Name", for clarity.

You may also want to verify that the Default Extension is what you want, and that the File Types are correct. File-Ex will try to get the file types from the original dialog's list, but it won't always figure them out.

See <u>Application Configuration</u> for more explanation of these.

Editing File Types

This dialog allows you to add or modify an item that is included in the File-Ex dialog's File Types list. This dialog is invoked from the <u>Application Configuration</u> dialog, Add or Edit file type.

There are two items that can be changed:

Description

This is what is shown in the file type list. You can include the file masks here for clarity, but it's not necessary. This description can be up to 60 characters long, but currently the actual number of characters that will be visible in the list is about 25 (depends on what characters are used).

Mask(s)

This is a string of one or more file masks, and determines what files will be shown in the File List when this file type is selected. This can be up to 39 characters long, and each mask (if more than one) must be separated by semicolons -- no spaces.

Examples:	What files will be shown:		
* *	(All files)		
*.txt	(Text files)		
.doc;.dot	(Word documents and templates)		
.xl	(Excel files)		

Note that the list of file types in the Application Configuration dialog includes both the description and the masks, unless the masks are already included in the description.

Warning! If any of the masks are not a valid filename/wildcard mask, then the File Types list in the Open or Save dialog may come up partially or completely empty!

Microsoft Word and Excel Pre-configurations

File-Ex comes pre-configured for Microsoft Word and Excel, since these are the most commonly used applications that use the Common Dialogs DLL.

Note: Since the dialog size must be recognized, the File-Ex pre-configurations **only** apply to the **English** language versions of Word and Excel. Other language versions use a different size of dialog to accomodate the longer text. You will need to <u>train</u> File-Ex yourself for other language versions of Word and Excel.

The Open dialog for each of these is configured to be Replaced by File-Ex. This will satisfy the needs of most people. If you commonly open file types other than the standard .DOC & .XL* files, you can add the appropriate types to the <u>File Types</u> list in File-Ex. You may need to change the configuration to Add the File-Ex Button, like the Save dialogs, if you use other file types frequently (see below).

The Save/Save As dialogs for these are configured to Add the File-Ex button, and Automatically Open/Close the File-Ex dialog. This means that you will normally see both the original dialog and thten the File-Ex dialog on top of it, so you can Cancel the File-Ex dialog to get back to the original Word or Excel dialog. This is necessary if you ever need to save a file in a non-standard file type.

To explain: Microsoft Word's (and Excel's) Save As dialogs have options in the File Type list to save a file in various formats. Word uses the type that the user selected *in its own dialog*, regardless of the extension given the file. However, File-Ex can't select a type in Word's dialog.

Therefore the only way to select a type other than the default "Word Document" is to go back to the Word dialog to select the type. With File-Ex configured as "Add button", that's no problem. With File-Ex configured as "Add button with Auto-Open", you can Cancel the File-Ex dialog to get back to Word's dialog, and then select the type. Since most documents are saved in the default format, this configuration was chosen.

If you don't like seeing both dialogs pop up every time, you can configure File-Ex to initially hide the original dialog. You will then see only the File-Ex dialog, unless you press Cancel.

The Insert File/Picture dialogs are configured to simply Add the File-Ex button. These dialogs have special features that can't be met with File-Ex alone, so we didn't want to obscure those. All of the features of File-Ex are still just a click away, though. If you use the File-Ex dialog to select a file and click OK on it, that file name will be automatically inserted into the original dialog, so you can just click its OK button to perform the Insert operation.

Application Configuration Dialog

This dialog allows you to change some things about the way File-Ex operates for a specific application's dialog. (This only applies to 'learned' applications, not the ones that automatically use File-Ex through the Common Dialog DLL)

The field descriptions of things that can change are listed below. In general, feel free to experiment, since some configurations will work better than others.

Do not make changes to these settings while the application's dialog is open!

Note that if you Cancel this dialog, all changes to these fields will be ignored.

Application Name

The Application Name may be changed to make the list of Known Applications (in the File-Ex Configuration dialog) more clear. This is all that this field is used for, so there are no other consequences of changing this. For example, you can add the application's version number (especially if you have more than one version installed). Or if the Dialog Name if not descriptive enough, you can add more information.

Dialog Type

The Open/Save setting determines how the dialog acts -- whether it checks for a valid file already existing, whether the file list is greyed out, etc.

File-Ex Action

This determines what File-Ex does when it sees the dialog opening. It can be changed any time from here, so you can try different methods to see what works best.

There are 3 basic options for what it does:

Some dialogs are set up as Replace Entire Dialog, so you never see the original dialog for the application. This is fine as long as there are no special features in the app's dialog. The Microsoft Word's Open dialogs are set up initially as Replace.

Others just Add the File-Ex button to the original dialog. This is necessary if the dialog has special features that are needed, and is also necessary where files can be saved as different types even though the extension is the same, such as in Word (it has to know what type was selected in its own dialog). The Microsoft Word's Insert File & Insert Picture dialogs are set up initially this way.

Optionally you can <u>Add the File-Ex button</u>, but also <u>Automatically Open/Close</u> the File-Ex dialog. If you also select <u>Initially hide the original dialog</u>, you won't even see the original dialog unless you Cancel the File-Ex dialog. In this case it will drop back to the original dialog. This is useful if you normally want the File-Ex dialog, but occasionally need to go back to the original one for special functions. The Microsoft Word's Save As dialogs are set up initially this way.

Default Extension

The default extension may or may not be automatically known when the dialog is created, and may or may not be useful. This is typically what extension to use if no extension is entered. For example, if

you type the file name as simply "myfile" and the default extension is "doc", then it will open or save the file as "myfile.doc".

Application Accepts Long Filenames

If the trained application already uses long filenames under Windows 95, then check this box. (This will usually be the case only for an application designed specifically for Windows 95.) File-Ex will then give the long name to the application. Otherwise, File-Ex will convert the long name selected into a short name, then give the short name to the application -- thus older applications don't even know you're using long names.

File Types

Up to 20 file types may be defined, to appear in the File-Ex dialog's File Type list. The first type is always the default selection. This basically just determines what files are listed in the dialog. The application will not know which of these was selected, so it cannot be used for selecting different file formats for opening saving, such as in Microsoft Word.

You can Add file types at the end with the Add button next to the list, or use the Insert button to add a type above the currently selected entry.

Edit and Delete file types by first selecting the type in the list, and then clicking the appropriate button.

Adding or editing will bring up the Edit File Types dialog.

Copy File

To copy a file with File-Ex:

- 1. Select a single file in the file list box, or type the file name in the File Name edit box.
- 2. Press the Copy button.
- 3. In the dialog that appears, enter the new file name. If you want to copy it to another directory or disk drive, enter the full path here or select a path with the Browse button.
- 4. Press OK to perform the copy, or Cancel to abort.

Notes:

Only one file may be copied -- multiple selections or wildcards are not allowed.

If Copy is done from the Open dialog, and the new file name is visible in the file list (still meets the file type criteria and was copied within the same directory), it will be selected automatically after the Copy.

Move File

- 1. Select a single file in the file list box, or type the file name in the File Name edit box.
- 2. Press the Move button.
- 3. In the dialog that appears, enter a new path or use Browse to select a path.
- 4. Press OK to move the file, or Cancel to abort.

Notes:

Only one file may be moved -- multiple selections or wildcards are not allowed.

A path <u>may</u> be specified on a different drive. In this case, the file will actually be copied and the original file deleted.

Do not specify a new file name -- use the Rename function for changing the name.

Delete File or Directory

To delete a file with File-Ex:

- 1. Select a single file in the file list box, or type the file name in the File Name edit box.
- 2. Press the Delete button.
- 3. A dialog will appear requesting confirmation, showing the complete file path...
- 4. Press OK to delete the file, or Cancel to abort.

Notes:

Only one file may be deleted -- multiple selections or wildcards are not allowed.

If the file is currently open by an application (even the application you're using File-Ex in), then the file may be 'locked', and cannot be deleted.

To delete a directory with File-Ex (old-style dialogs only):

- 1. Select a directory in the directory list box (click on it).
- 2. Press the <u>Delete</u> button.
- 3. A dialog will appear requesting confirmation, showing the complete path...
- 4. Press OK to delete the directory, or Cancel to abort.

Notes:

Only the current directory or a sub-directory of the current directory may be deleted.

Only empty directories may be deleted.

The dialog's current directory may change after the operation.

Rename File or Directory

To rename a file with File-Ex:

- 1. Select a single file in the file list box, or type the file name in the File Name edit box.
- 2. Press the Rename button.
- 3. In the dialog that appears, enter the new file name or a new path and filename.
- 4. Press OK to rename the file, or Cancel to abort.

Notes:

Only one file may be renamed -- multiple selections or wildcards are not allowed.

A path may be specified with the new file name to move it to a new directory, but it may not be moved to another drive -- it must remain on the same drive as the original file. To move a file to another drive, use the Move button.

If Rename is done from the Open dialog, and the new file name is visible in the file list (still meets the file type criteria and was copied within the same directory), it will be selected automatically after the Rename.

To rename a directory with File-Ex (old-style dialogs only):

- 1. Select a directory in the directory list box.
- 2. Press the Rename button.
- 3. In the dialog that appears, enter the new directory name.
- 4. Press OK to rename the directory, or Cancel to abort.

Notes:

Only the current directory or a sub-directory of the current directory may be renamed.

The dialog's current directory may change after the operation.

Find File

File-Ex contains a powerful Find feature. To find a file:

- 1. Enter a file name or up to 10 file masks (with wildcards) in the File Name edit box. (Separate masks with a semicolon, no spaces.)
- 2. If you want to search only a particular disk drive, select that drive in the Drives list.
- 3. If you want to search in a particular directory (and its sub-directories), select that directory in the Directory list.
- 4. Press the Find button.
- 5. In the dialog that appears, you may edit the filename/masks if necessary.

 Up to 10 filenames and/or masks may be entered, separated by semi-colons.
- 6. Select the directory search option required:
 - Search Directories: Searches the directories shown, and any sub-directories of them. Up to 10 directory paths may be entered, separated by semi-colons.

Current Drive: Searches from the root directory of the current drive (shown)

Selected Drives: Searches from the root of all drives selected (shown)

To select different drives, use the drive list. Hold the <Ctrl> key down to select (or deselect) each drive wanted.

- 7. Press the Search button.
- 8. If you want to stop the search before it's done, press the Stop button.
- 9. When the search is done (or stopped), you may select a file from the list of files found.
- 10. After selecting a file, press <u>OK</u> to transfer that file to the Open/Save dialog. The drive/directory will be changed accordingly, and the file name will be placed in the File Name edit box.
- 11. If it did not find the file you were wanting, you can change the search criteria (steps 5 and 6) and try again, or <u>Cancel</u> to abort.

Notes:

You may scroll through the list of files found during the search, and stop the search as soon as the desired file is found.

Make Directory (MkDir)

To make a new directory with File-Ex:

- 1. Change to the directory under which you want the new one in the Directory list box. (Make sure the path is shown correctly above the list box.)
- 2. Press the MkDir button.
- 3. In the dialog that appears, enter the new directory name.
- 4. Press OK to create the directory, or Cancel to abort.

Notes:

Only one level (a single directory) may be entered as the new name.

After the directory is created, File-Ex attempts to change to that directory by entering the full path in the File name box and selecting OK. Some programs may intercept the OK and thus not change directories properly, or perform another function in addition to changing directories.