
Office XP Data Recovery

One of the most important new features in Office XP, says Microsoft, is improved facilities for managing documents and retrieving information from corrupted files. But just how good is it?

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Microsoft is encouraging companies to upgrade to Office XP with claims that the new version is easier to use and easier to support, and with new licensing terms too. But will the new features actually make supporting your users any simpler or just give them more bells and whistles to play with?

This article looks at the tools for managing documents and rescuing data when things go wrong. After all, if there's any work involved, most users are never going to do a backup and even the most reliably set-up PCs will crash from time to time and lose data. If you're asking users to save files they want backed up onto a networked drive, you're bound to find some users saving files locally and then coming to you when the documents get corrupted. Even if you're using backup agents to back up users' hard drives across the network that's not likely to be more than once a day, leaving many opportunities for lost work and wasted time.

All this means features to protect documents or recover lost data on the client are crucial. The improved data recovery tools in Office XP can make your life easier when supporting users and the new options for where documents are saved by default should put user documents where you want them.

Save And Save Again

Word has always been good at preserving documents, with the option for saving automatic backups of all files and AutoSaving documents at regular intervals, with the AutoSaved information automatically recovered into a temporary file if Word or Windows crashes. Previously Excel was the only other Office application with any data recovery features and those were poor; even in Excel 2000 AutoSave was an optional add-in not included in the default installation, requiring additional setup. Even when installed, Excel 2000's AutoSave defaults to only saving the active document and interrupting the user with an intrusive prompt before each save. This can be changed but the settings return to the defaults each time Excel is run and many users will choose to skip or cancel rather than saving. None of the other Office programs included features to safeguard data in the event of a crash.

New Improved

Office XP includes several major improvements for data recovery, with the extension of AutoSave to more applications, improved document recovery after crashes (again in more applications) and tools to recover or restart hung applications without losing unsaved changes to documents and repair corrupted documents.

Excel and PowerPoint now have AutoSave options similar to those in Word, and if users choose the default of using Word to compose Outlook email they'll have the data recovery features of Word for messages too. You'll find the AutoSave setting in the same Save pane on the Tools/Option dialog in all three programs, but the options differ somewhat for each package.

All the applications allow you to choose how often to automatically save changes to documents. The default is every 10 minutes but you can set longer intervals for notebook users who need to conserve battery power by accessing the hard drive less, or if you want to reduce network traffic to a shared documents folder. Excel also lets you specify where to save the AutoRecovery files themselves. This defaults to a local directory and it's worth leaving this as the setting even if you store documents on the server as Excel can prove slow when saving to a network drive.

AutoSave doesn't just save users the bother of using the Save command regularly. If Windows or the Office application crashes, the saved data is used to recover the document. The next time that application runs, any documents that were open show

up in the AutoRecovery task pane with icons for the original version of the file and the recovered version. The thumbnail icons show the data and time each document was saved, so it should be easy to see which document to save or work on. The amount of data recovered depends on how recently the document was AutoSaved but this feature works extremely well in all three applications. Make sure it's switched on and you should hear far fewer user complaints about lost work.

Crashes And Hangs

If users report an application that's hung, Office now gives you a tool for saving the documents they're working on and restarting the application cleanly. If an Office application crashes it gives you the option to save open documents first and then generates an error report explaining the problem. And if there's a problem starting the program it runs in Office's version of Windows Safe Mode.

There's nothing more infuriating than a program that crashes without warning and declares calmly that the application is shutting down and taking the document with it, or simply hangs leaving users no option other than restarting Windows and losing any unsaved work in the file. Office XP monitors running applications and will sometimes notice that an application isn't responding before your users do. Instead of just closing the application down, it notifies the user of the problem and gives them the option to save their document before the application exits. It also prompts users to automatically send a crash report to Microsoft so the Office development team can analyse common problems and develop fixes. Microsoft used this information to fix many problems with beta versions of XP applications.

DW.EXE, the crash reporting tool, captures user settings from the registry that relate to the crash, and the current memory block where the application is running, and

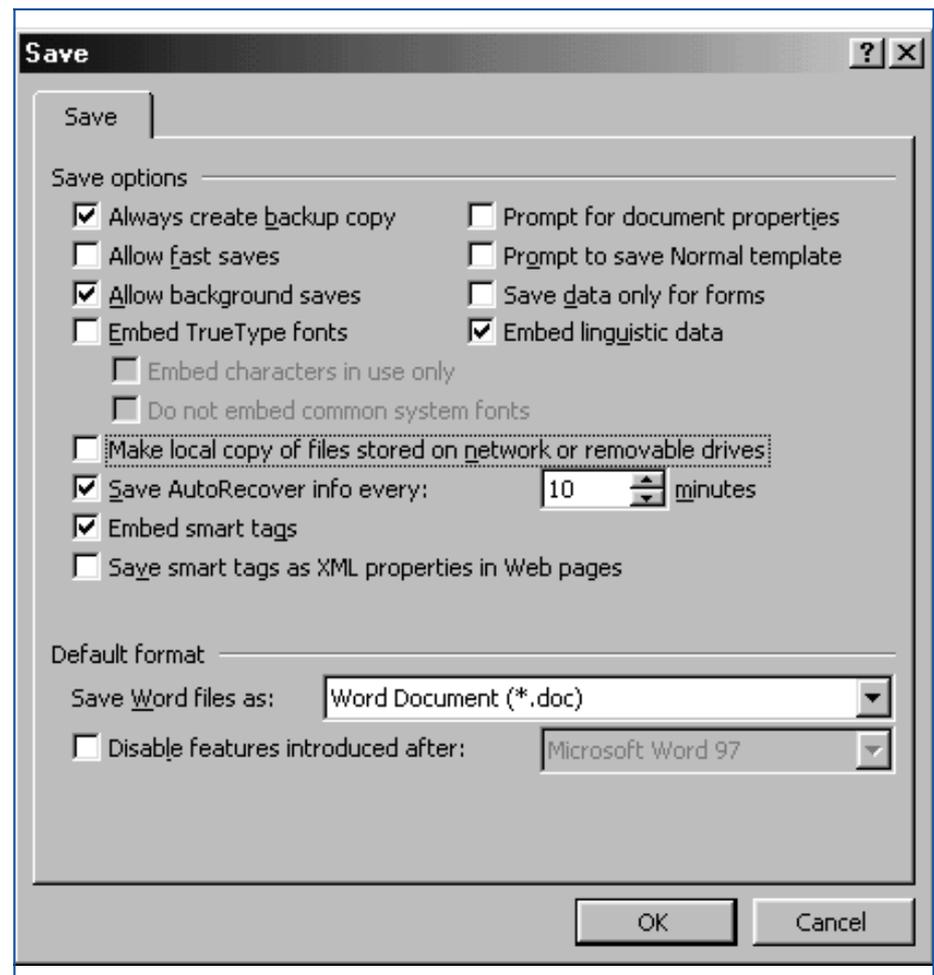


Figure 1 - Set up the Save options in Word, Excel and PowerPoint to enable AutoSave. Word has the most useful options but be sure to turn off Fast Save.



Figure 2 - Office XP apps attempt to automatically recover corrupted and damaged files when users open them. You can create custom help to direct users to call your support desk when they see this dialog.

packages that information up with supporting files like the file being edited at the time of the crash and any templates or associated files in use by the application, creating a cabinet file.

By default this information is submitted to Microsoft and if Microsoft has identified a solution for the problem being reported, DW.EXE returns a URL where the user can find the solution, which may be a software update or a Knowledge Base article. Alternatively you can use the Corporate Error Reporting Tool in the Office Resource Kit to manage the cabinet files created by DW.EXE and redirect them to your own server. That way you can collect details of the crashes your users are experiencing to see whether you can show users how to avoid crashes or develop workarounds for situations that commonly produce crashes. You can then create custom error messages and help topics to help users avoid crashes.

Using the Corporate Error Reporting Tool also lets you review the information in the crash reports before it's submitted to Microsoft and choose what information is packaged up into the cabinet file, for example excluding confidential documents, by setting a policy or changing a registry setting on the user's computer.

Buckets

The crash data collected by DW.EXE is stored in "buckets" within the reporting tool's File Folder Tree, which you'll need to create on an NTFS-formatted Windows 2000 or NT 4 SP6a server with at least 2 GB of hard disk space. These buckets group together crash reports from users with the details of system memory, metrics of the crash and any supporting files. The amount of space needed to store crash reports depends on the number of crashes and the number of cabinet files collected in each bucket rather than on the number of users, so even a large corporation shouldn't need significantly more than 2 GB. If you choose to submit the crash data to Microsoft you'll find it takes some time, especially if you're including the supporting documents, so leave the job running overnight.

If an Office application hangs without Office notifying the user, the user can shut down or restart the application using the Microsoft Office Application Recovery utility (under Microsoft Office Tools on the Start menu). This lists all the Office apps that are running, and whether or not they've stopped responding to Windows. Again, users get the option to save open documents before the applications shut down.

Documents saved from a hung or crashing application are treated as recovered documents and show up in the AutoRecovery task pane with a new file name, which can cause confusion if the user looks for the saved changes under the original file name. You may want to provide training on the difference between the original file, the AutoSaved version containing the data as of the last AutoSave and the AutoRecovery file which may contain further text recovered from temporary files.

If files become corrupted, Word, Excel and PowerPoint will attempt to repair the file automatically when the user opens it. If this is successful, the user will see a dialog telling them that the file has been repaired and giving further information about the problems. It's also possible to use the AutoRecovery tools manually to open a file that users cannot read in Word or Excel in the normal way. From the File / Open dialog, choose the file required and click the drop-down menu next to the Open button to choose Open and Repair. Office will extract as much of the data as possible from the file. Other commands on this menu allow users to take a copy of a document or open a read-only copy of a file to protect it against any accidental changes.

Versions And Backups

If users need to keep multiple versions of documents so they can track the different stages of revision, you can set up Word to automatically create a versioned document each time the document is closed. This is not the same as Word's option to turn on backups of all documents, which gives users a copy of just the previously saved version of the file, which is updated each time they save. Choose File/Versions and select "Automatically save a version on close". You can also create a version based on the state of an open document with File/Versions/Save Now. You can include comments to identify the different versions of the document this way.

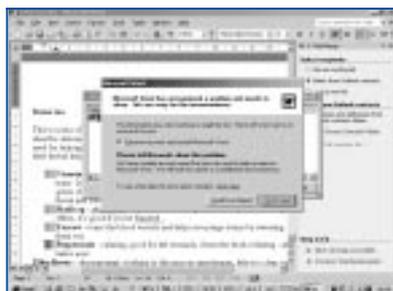


Figure 3 - When an Office XP app stops responding, users see this dialog

Open previous versions of the document from the same dialog box.

Versioning archives the different versions of the documents, so users can't make changes to any previous version. If they need to revert to a particular version and work from that, they'll need to open the version and then use Save As to save the document as a new file. If you have users complaining about problems with locked documents or read-only backups, it's worth checking if they've been using versioning.

Fast Save

It is also worth turning off the Fast Save option in Word and PowerPoint. Instead of saving the entire document, Fast Save saves only the changes each time. If a user makes many changes to a document, for example moving large sections of text, the size of the file can increase dramatically as the text is stored twice and even small changes soon push the file size up. Opening the document can also take longer as Word has to process the list of changes in the file to load it. Fast Save documents also seem more prone to corruption if the save is interrupted. With modern hard drives and fast networks, the time saved by Fast Save is rarely worth the problems it can cause but it is still selected by default in the installation.

Default Locations

If you want your users to save documents in particular directories on the local machine or a network file server, you can set the default document location. In Word and PowerPoint you set the default location for saving user documents from the File Location tab of the Options dialog; in Excel the same option is on the General tab. Word has an additional setting to automatically keep a local copy of any documents that are saved onto a network or a removable drive. If you turn this on for laptop users who often work away from the office they won't need to take copies of documents manually. When the users return, choosing File/Save As to overwrite the original document allows the merging of the two files either into the existing file or a new combined document. Word uses revision tracking to highlight the changes between the files.

A new feature in the File dialog box simplifies the management of multiple document directories and complements the option in Windows 2000 and Windows Me to change the target of the My Documents object to another directory (on the local machine or a server). From the Tools menu in the File dialog you can add additional destinations to the standard options in the Places bar shown in the dialog. Word uses the name of the directory for the icon name but if this is not appropriate you can right-click on the icon in the Places bar and rename any icons you've added to make them clearer to your users. You can also right-click in the Places bar to change the order of the icons or choose Small Icons to display a larger number of icons.

If you have a large number of systems to support, you don't need to change the relevant settings for these features by hand. Depending on the settings you want to customise, you can use the Profile Wizard, the Custom Installation Wizard, the Custom Maintenance Wizard, the System Policy Editor or the Windows 2000 Group Policy MMC snap-in (all in the Office Resource Kit) to specify the settings, before or after you deploy Office XP.

Conclusion

These tools give you the option to customise Office XP's document management and data protection settings to make it easier to support your users. The AutoRecovery and error reporting tools will be particularly welcome if you have users complaining of crashes and lost work. And as most of these features work automatically, without requiring your intervention, they could save you time as well as keeping documents safer and users happier.

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PCSA

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