2020COLD REPORTS

User Guide

TRADEMARKS

STATEMENT RETRIEVER™; ProDOC Receipts™; ProDOC Forms™; CheckLogic™; idocVAULT™; 2020eDOC™; 2020iDOC™; RENAMER™; ProDOC™; PrxPay™; ProDOC Packages™; CheckLogic Manager™; CheckLogic Lite™; REED2020™; PAPERLESS RECEIPTS™; PrxPay™; eDOCMobile™; eUpdate™; 2020iSYNC™; CheckLogic Mobile™; 2020COLD®; EMAIL-4-STATEMENTS®; Click. Close. Technology.® ; 2020DOC®; eDOC Innovations®; eDOCSignature® are all trademarks of eDOC Innovations. All other trademarks are the property of their respective owners.

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## COPYRIGHT NOTICES

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Introduction

2020COLD Reports is a desktop application for organizing, searching, viewing, and annotating report documents. It stores years of reports on CD-ROMS and/or Network Servers and centralizes them for easy accessibility. It features controlled access, encryption security, and can read and search text files across multiple directories.

2020Cold Reports support the following web browsers: Internet Explorer 10, Mozilla Firefox, and Chrome.

Installation

Launch **GreenBar_Install.exe**. This will open the **eDOC Installer Wizard**. Click **Next**.
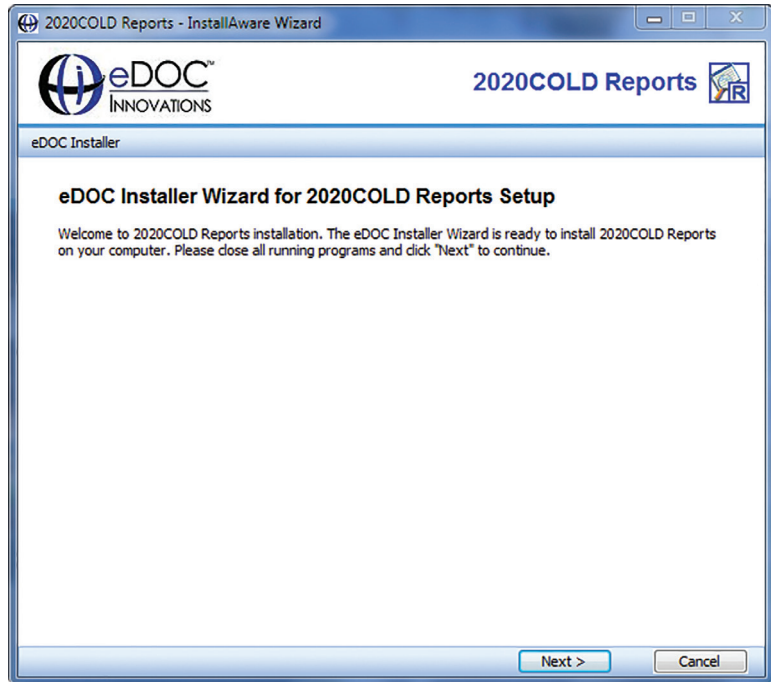
Read the License agreement. Check the **I accept the terms in the License Agreemen**t and click **Next**.
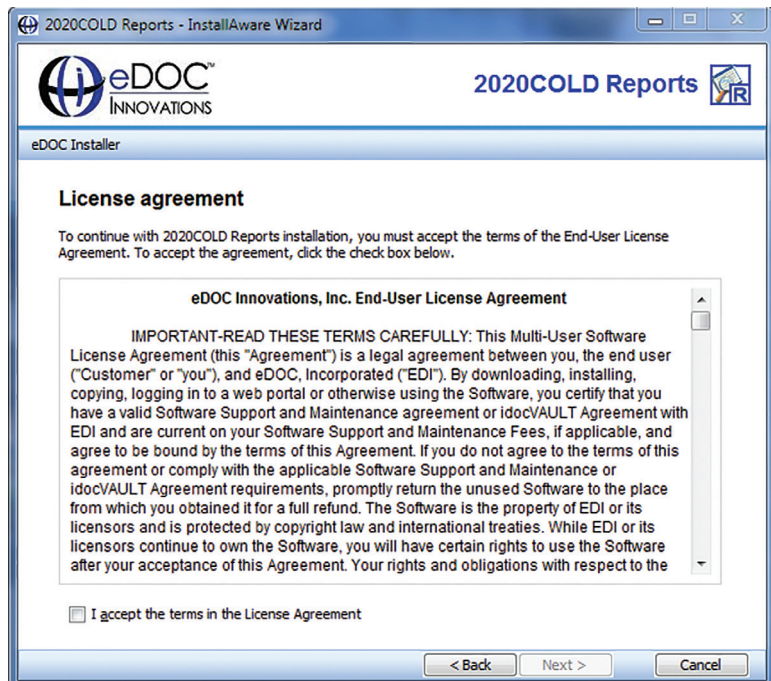
Select destination folder. Click **Next**.
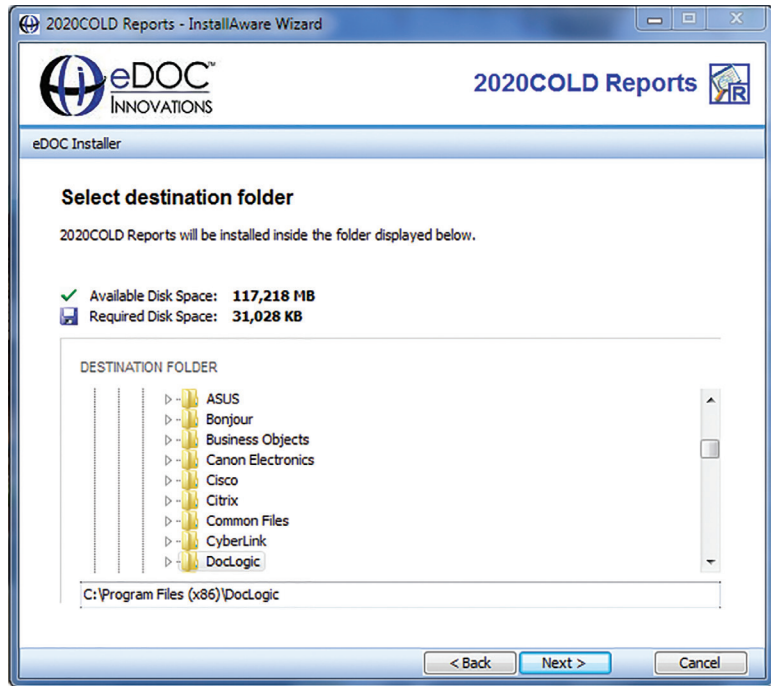
Fill in your **Company Information**, License Number, etc. and click **Next**.

Click **Install** to install or **Back** to review or revise installation settings.

The program will being to install. A progress bar will show the progress of the installation.

Once installed, an Installation Result window will open. Click Finish.

Login

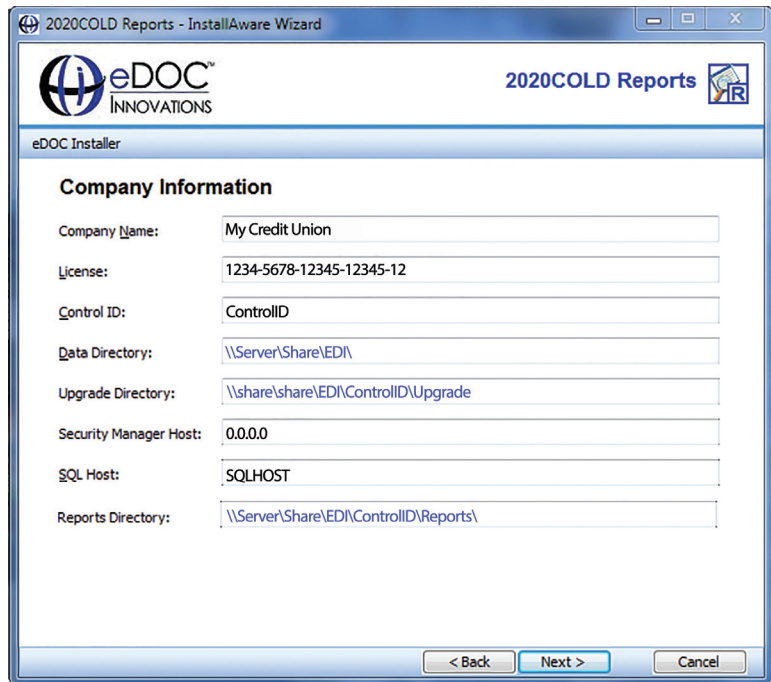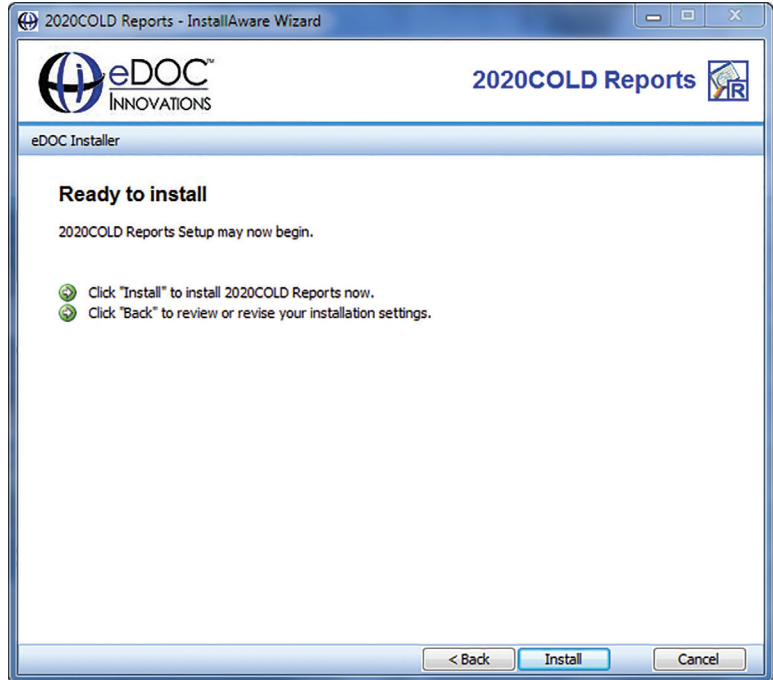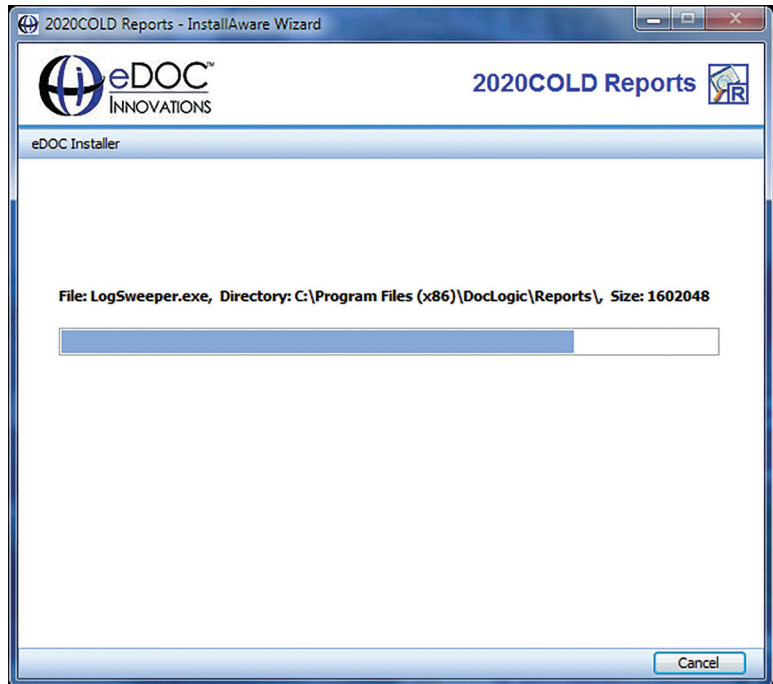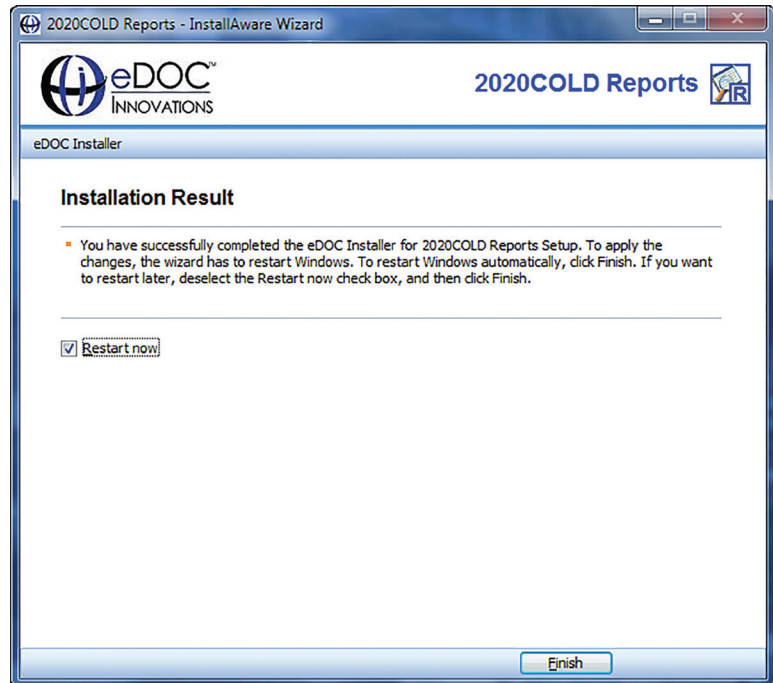For automatic login, authenticate users through the Microsoft Active Directory service (see next section: Security). Otherwise, click on the Reports icon to launch the program. A login screen will open. Enter **User Name** and **Password** and click on **Login**. Clicking on **Cancel** will close the program.

Reports Icon
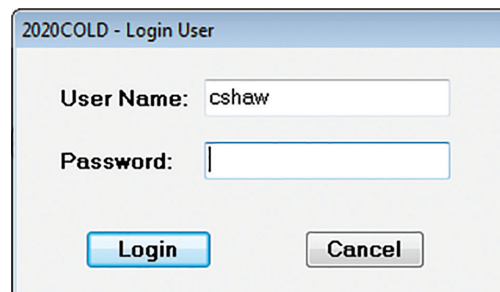
Login New User

To login a new user, click on **File | Login New User**. Enter the new **User Name** and **Password** from the **Login User** window and click **Login**. Anytime **Cancel** is clicked from the Login window, the program will close and a user will have to login again.

Change Password

To change a user's password once they have logged in, click on **Security | Change Password** from the main menu.

Enter **Old Password**.
Enter **New Password**.
Reenter the **New Password**.
Click **OK**.
Cancel will close the **Change User Password** window without saving changes.

Security

Adding and Editing Users and Groups

All eDOC Innovations' programs use a common security module that allows for the creation of users and groups within the programs. To add and edit users and groups, the user must have administrative rights. When the software is initially installed, eDOC Innovations creates a group called Administrators. All other groups that are required will be created by the client. **If using the Microsoft Active Directory service, user and groups names in the eDOC system must match the user and groups names of the Active Directory service.**

2020COLD Reports Privileges

COLD View Reports	Allow the user to view reports from 2020COLD Greenbar Report Viewer.
COLD Change Preferences	Allow the user to change 2020COLD Greenbar Report viewer preferences.
COLD Capture files	Allow the user to capture reports from the serial ports, modem, or other supported capture mechanism.
COLD Add note	Allow the user to add notes to reports.
COLD Modify notes	Allow the user to modify notes already added to reports.
COLD Archive files	Allow the user to archive files.
COLD Configure tools	Allow the user to add or remove applications from the tools menu.
COLD View all except <File Extension> files	Removes the ability to view files with a particular extension, for example: 'COLD View all except SEC files' would prevent the user from viewing any file ending in ".SEC" (not case sensitive), such as "Weekly Report.sec" and "Cash Report.SEC".

To access **Users and Groups** select **Security | Users and Groups.** This will display the Users and Groups window.

Only the Control ID that the current user has permission for will be visible in the list.
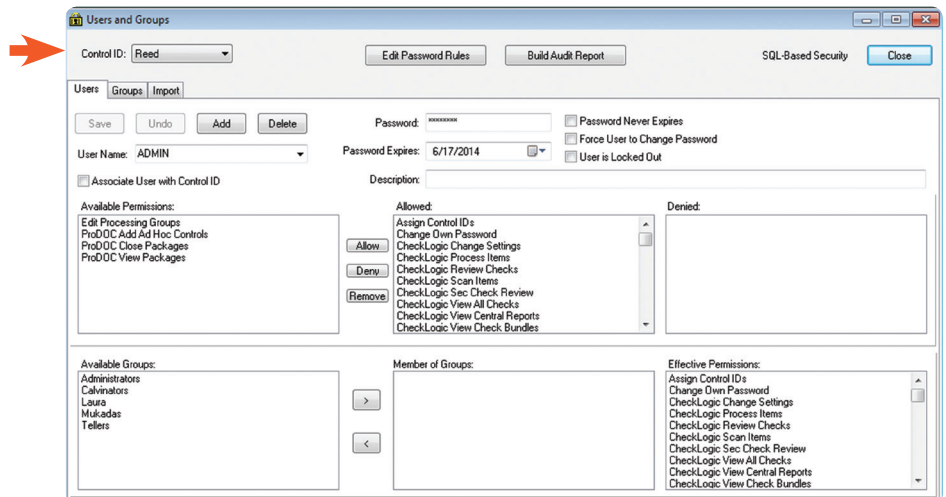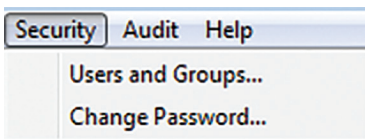
Click on the **Edit Password Rules** to open the **Password Rules** window. Modify and set the rules that will define acceptable password content.

Click **Save** to save changes.

**Cancel** will close the window without saving any changes.

Add Users and Groups

To add Users make sure the User tab is selected. Click **Add** from **Users and Groups**. Add the User Name, Password and Expiration Date. Click **Add User**.

Assign Permissions to a User

Before assigning permissions to a user and assigning the user to a group, make sure the **User** tab is highlighted and the correct user name appears in the **User Name** box.

To allow, deny or remove a permission, highlight the permission in the **Available Permissions** box then click **Allow, Deny** or **Remove**.
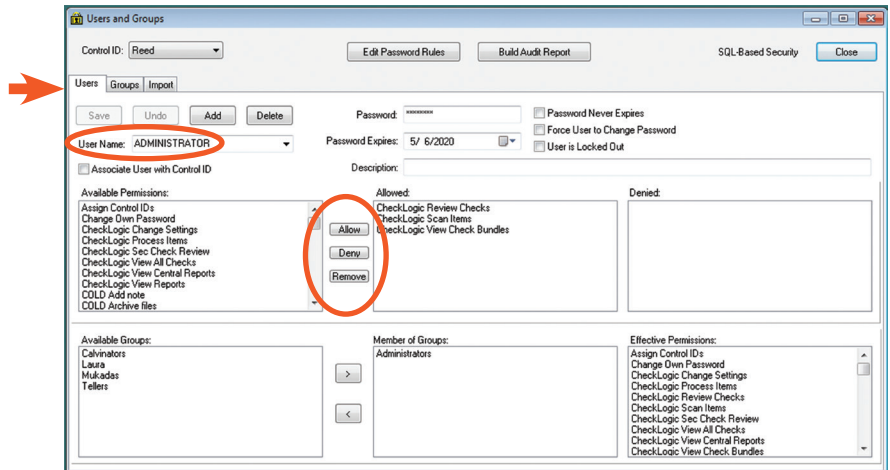
Assign a User to a Group

To add a user to a group, make sure the **User** tab is highlighted and the correct name appears in the **User Name** box. Highlight the **Available Permissions** to be granted and click the right facing arrow to move it over to the **Group Permissions**. Clicking the left facing arrow will remove the user from the highlighted group.

Once you have completed your changes, click **Save** to preserve your selections. Click **Close** to exit the window. If you try to close the window before saving your selections, the software will prompt you to save through an information window. Click **Yes**.
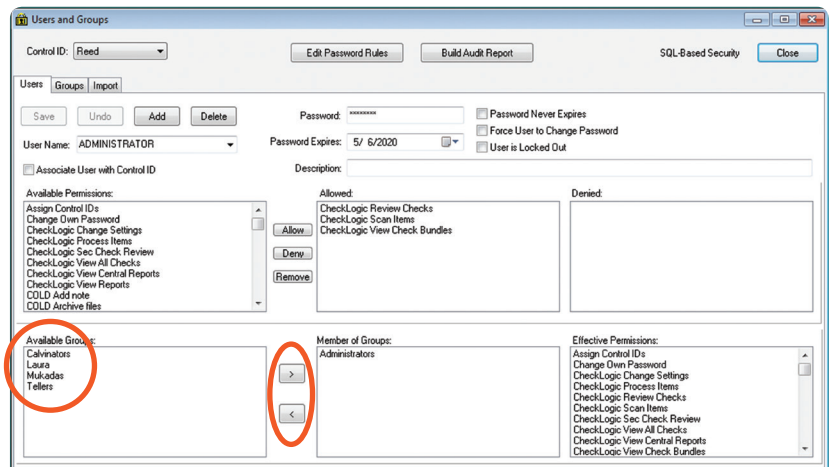

Add a Group

Before assigning permissions to a group and assigning a group to a group, make sure the **Group** tab is open and the correct group name appears in the Group box. Click **Add**.

The **Add Group** window will open. Add the new group's name, click **OK**.

A new, unique group ID will display. If adding a group representing an outside organization, enter a name that describes new group. Click **OK**.
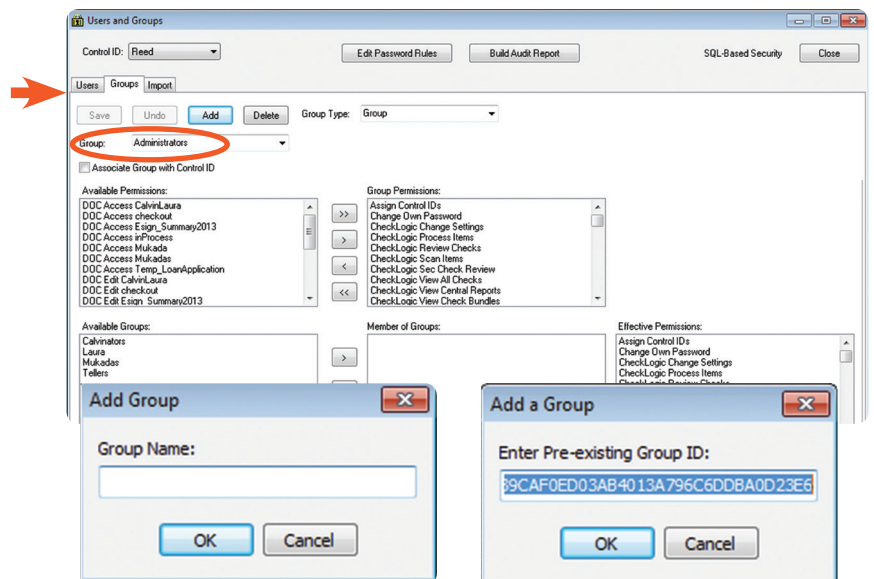
Assign Permissions to a Group

Adding a Group is performed in the same manner as adding a User. Make sure the Group name appears in the **Group** text box. Highlight the **Available Permission/s** to be added and click on the right facing arrow. To move all permissions click on the double right facing arrow. To remove permissions use the left facing arrow or double facing arrow to remove all permissions.

Once you have added permissions and made the group a member of a group, click **Save** to preserve your selections. Click **Close** to exit the window. If you try to close the window before saving your selections, the software will prompt you to save through an information window. Click **Yes**.

The **Build Audit Report** tab, next to the **Edit Password Rules** tab**,** opens the **Save As** window that will document and save all Users and Groups and their assigned permissions. The default location of the Audit Report is the application's private directory.
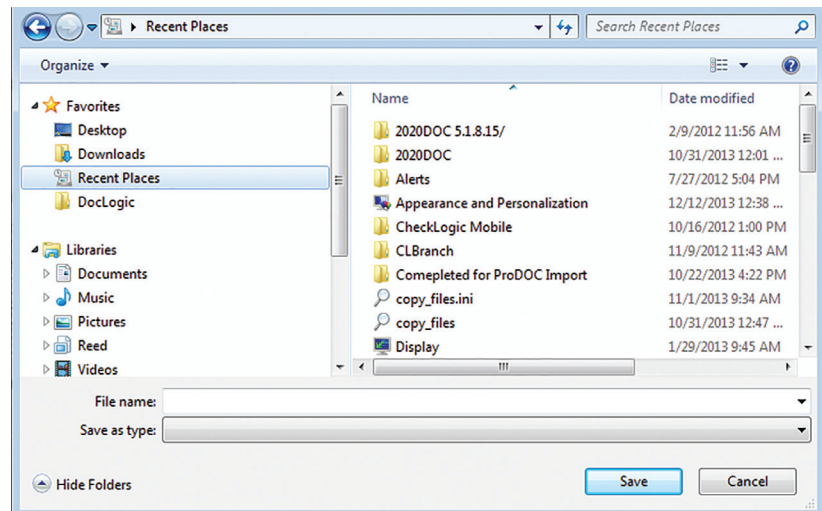
Converting Between File- and SQL-Based Security

The window selections for File-Based Security are the same as for SQL-Based Security except File-Based Security does not have an Import tab.

Enter the location of the specified file in **Location of . . .**

To import data into the SQL database, click on **Import into SQL Database.**

To export data to the Security File, click on **Export to Security File**.

**Associate Users with Control ID** automatically associates users with this Control ID.

To clears database after import, click on **Clear Database on Import**.

To import licenses, click on **Imports Licenses**.
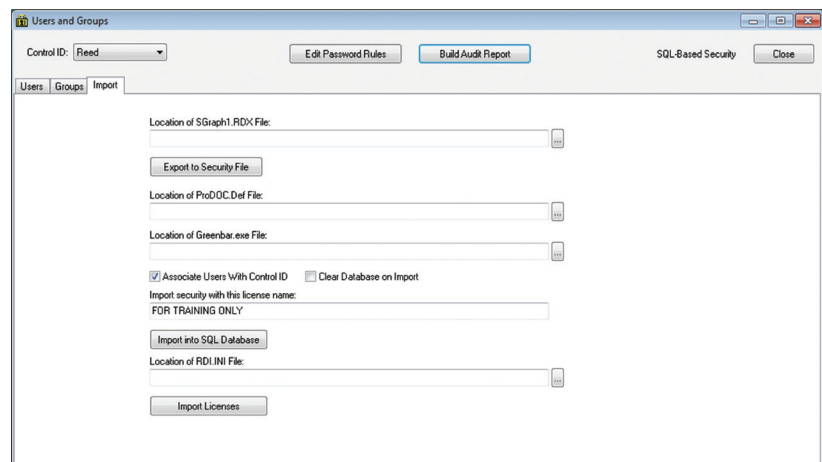
Menu Functions

The next few pages list all the functions in the **Main Menu** and **Menu Bar**. More in-depth explanations of advanced menu functions will proceed in pages that follow this section.
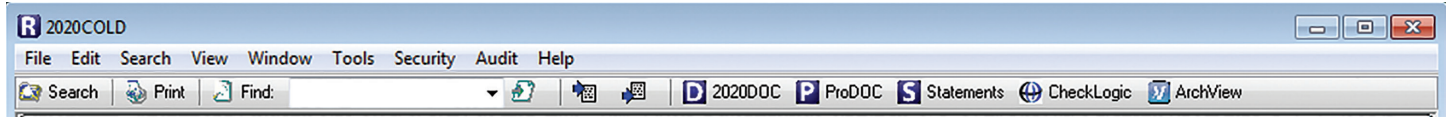

Main Menu

File

Open/Dir will open the directory structure in the left frame.
Close will minimize program windows.
Close All will exit all open windows and open a new window.
Next will minimize the open window and re-open the directory in the previous location.
Search will open the **Search for Files** dialog box to search user specified criteria.
Extract will unzip a file. If **Extract** is not highlight, no zip file has been chosen.
Eject will open the CD/DVD drive door.
Page Setup is where the user can specify formatting criteria; ie, margins, headers and footers.
Print will open the print dialog box. If **Print** is not highlighted, no printable document is opened.
Printer Setup will open a window that allows a user to specify printer parameters.
Preferences will open a window with four separate tabs, each allowing the user to customize how windows will display.
Login New User will exit window/s and display a login window for a new user.
**Exit** closes program.
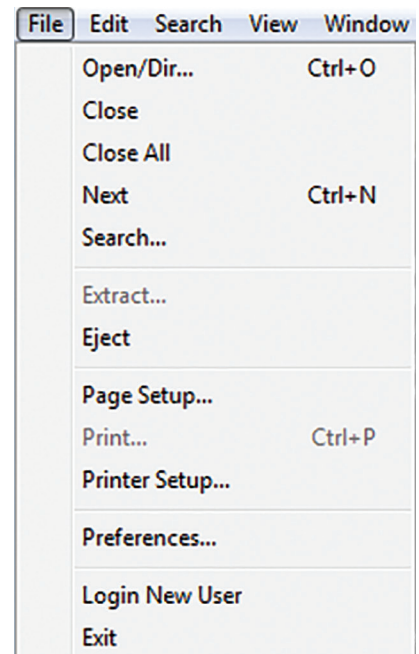
Edit

Copy will store highlighted material on the clipboard.
Select All will highlight all content in the open document.
Deselect will remove all highlighting.
Find will look for specified criteria in an open document.
Find Next will look for the next occurrence of specified criteria in an open document.
Go To Line will move the cursor to a specified line number.
Notes will allow a user to add notes to reports.
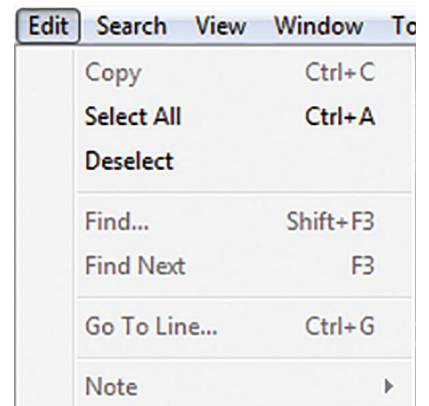
Search

Define opens the **Define Search** window where a user can modify or delete an existing search, or create a new query. Added queries are then added to the Search menu.
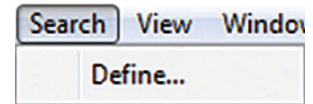
View

Text will display the file in text mode.
Hex will display file in hexadecimal.
Title Lock will freeze the title line/s at the top of report for scrolling.
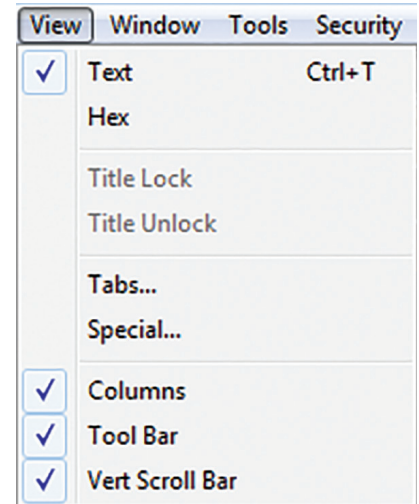**Title Unlock** will unfreeze the title line/s.
Tabs will open the Tab Stops window to set tab spacing.
Special will open the View Special dialog window.
Columns, if checked, will display a ruler denoting columns.
Tool Bar, if checked, will display the 2020COLD Reports toolbar.
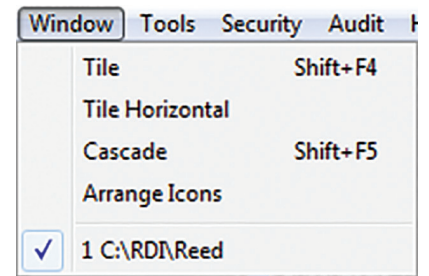**Vert Scroll Bar,** if checked, will display the Vertical Scroll Bar.

Window

Tile will display two open files side by side.
Tile Horizontal will display two open files top and bottom.
Cascade will display open files in a step down manner.
**Arrange Icons** will arrange the minimized icons.

Tools

Connect Net Drive will open the Map Network Drive window where a user may map a drive to his system.
Disconnect Net Drive will open the Disconnect Network Drives window where a user can remove a network drive.
Other **eDOC Programs** can be opened from within 2020COLD Report. This is customizable by the user. Programs can be added or deleted from this part of the Tools window using the Configure option.
Configure will open the **Configure Tools** window where program names and paths may be entered. Programs entered in this window will display in the Tools menu and on the Main Menu Tools Bar.
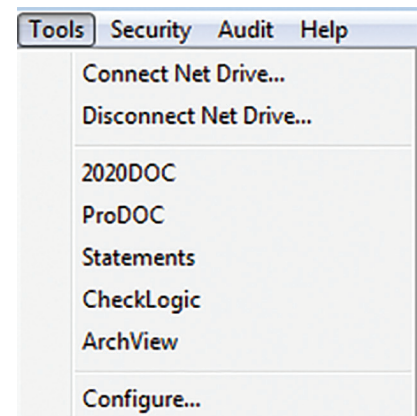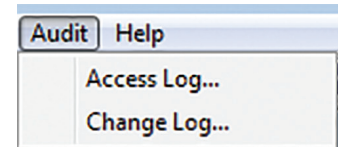
Security

Users and Groups will open the Users and Groups window where user permissions can be added, deleted or modified.
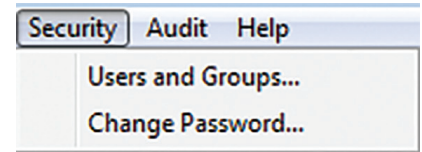
Change Password will open a window that enables a user to change their password.
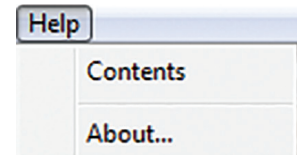
Audit Menu

Access Log will open the View Log File window to view the access history details.
Change Log will open the View Log File window to view the change history details.

### *Help Menu*

Contents (empty at this time).
About will open the **Splash screen** where the user can locate the software product name and version number. This information is helpful when calling our client support team.

Menu Bar

Find will be highlighted and for use only when a text document file is opened. Add text in Find and click on **Find Next.**

Other eDOC programs installed on the workstation. Click to launch.

Print will open the **Print** dialogue box.

Go to bottom of file.
Go to top of file.
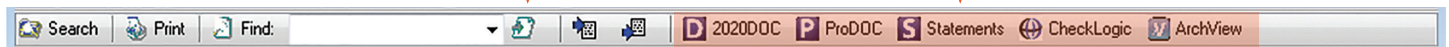
Search opens the **Search for Files** dialogue box where users can specify search criteria.

Viewing Reports

2020COLD Reports will open by default to the Directory window. To specify the directory that the application will open to, add the following line to your RDI.INI file for reports in the [Greenbar] Section.

[Greenbar]
Directory=\\Server\Share\RDI\MyCU\Reports (i.e. path to reports folder.)

The directory will open on the left with the content of the selected folder displaying on the right.

To display the content of a file, double-click it. To sort the columns, click the name of the column (Name, Size, Item type or Date modified) in the heading. The first click sorts in ascending order and the second click sorts in descending order.
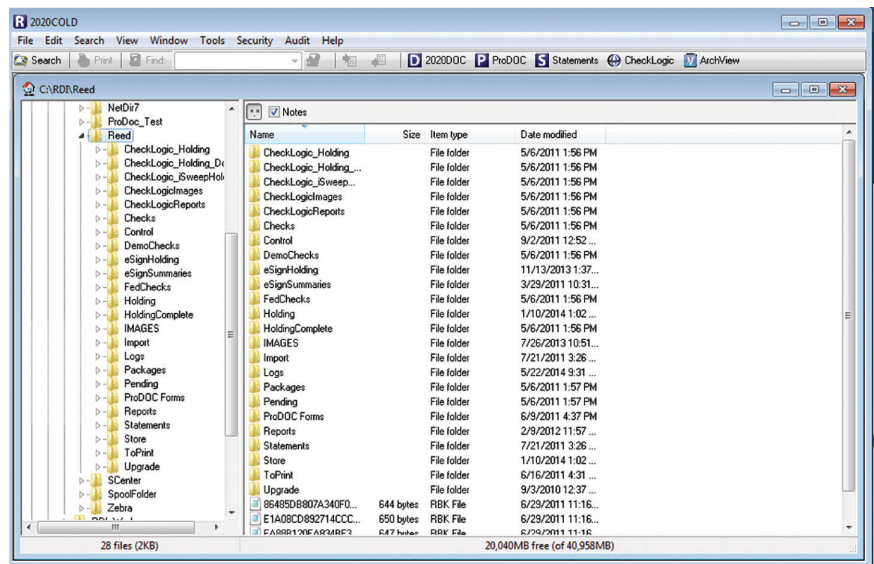
Double-clicking on a document in the Directory will open the file in Document view. The document will open in the application window and the Directory will minimize. To view the Directory and Document at the same time, click on the minimized window at the bottom to restore it to full size, then go to **Window | Tile** to split the application window in half. The Document view will default to the Greenbar style, but can be customized per workstation.
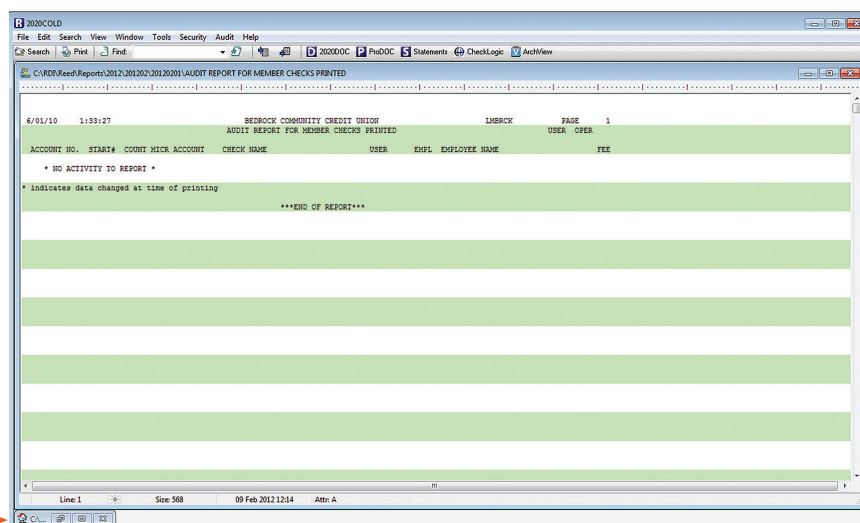

Directory view is minimized.

Preferences Window

File Types

File Extensions

Type the extension you want to add in the **File Extension** field and click **Add**. The file type added should be highlighted in the list under the field. Adjust any special characteristics for the new file type that Reports will use when displaying the file with that extension. Click **Save** to preserve the changes.

Users can also edit an existing file type by selecting the file extension and entering new characters. Click **Save**.

To **Remove** a file extension, select the characters and enter new characteristics to apply each time Reports displays a file with that extension. Click **Save**.
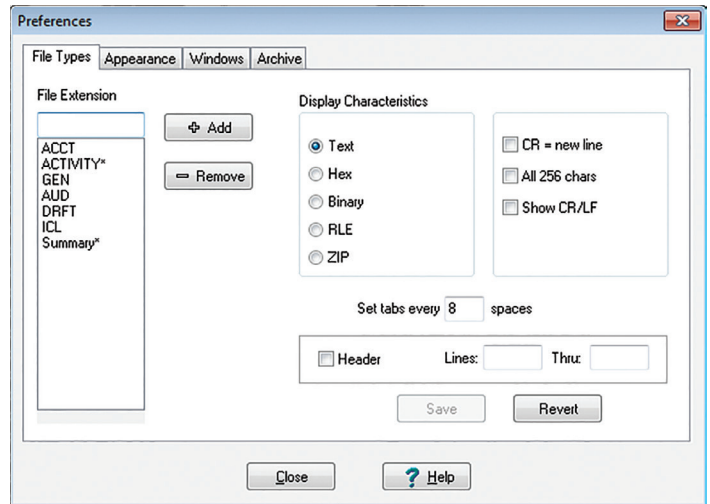
Display Characteristics

Occasionally, files transferred to Reports may require special extension configuration for viewing.

Text	Displays the file in text mode.
Hex	Displays file in hexadecimal.
Binary	
RLE	
ZIP	

CR	Changes all carriage returns to a line feed and a carriage return.
All 256 chars	Displays a printable character (usually a square) for non-printable characters.
Show CR/LF	Displays the non-printable CR/LF characters as a printable character (usually a square).

Enter a number into the **Set tabs every ...** box to set file tabs.

Some reports contain a **Header** line(s). Reports allows a user to freeze a number of lines so that while scrolling through the report, the Header line always displays at the top of the report.

To set headings, click the **Header** check box then enter the range of lines to freeze. For example: To freeze only lines 2 through 6, enter Lines: 2 Thru: 6 in the appropriate boxes.

Appearance

The Directory, Document and Search Results views are customizable per workstation to allow a user to select the window view and color scheme that works best for them. To change the color and font go to **File | Preferences | Appearance**.
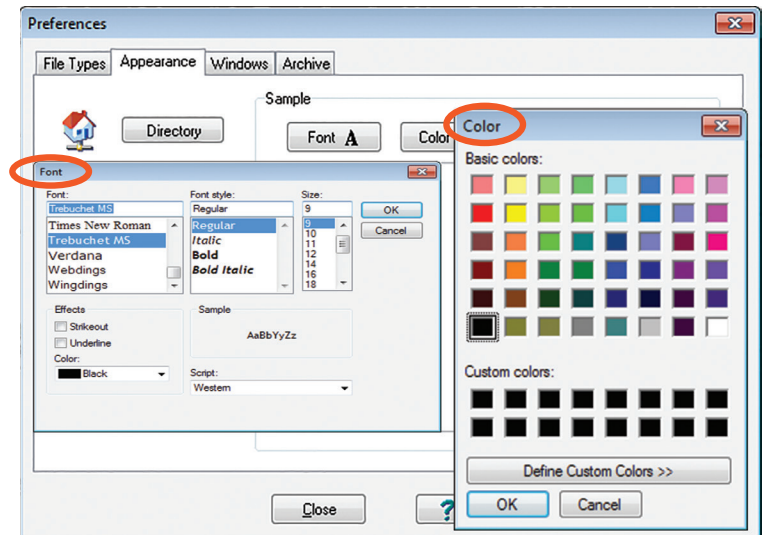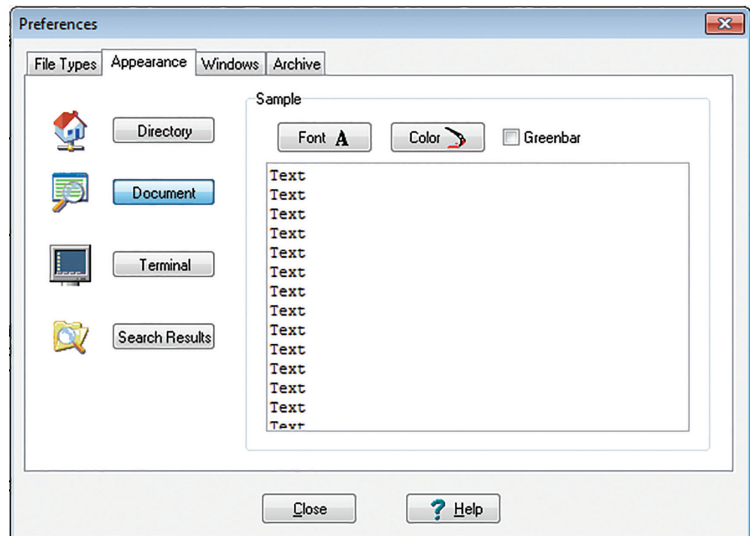
In Document view, the Greenbar style may be used with any color, or the background can be changed to a solid color by unchecking the Greenbar check box.
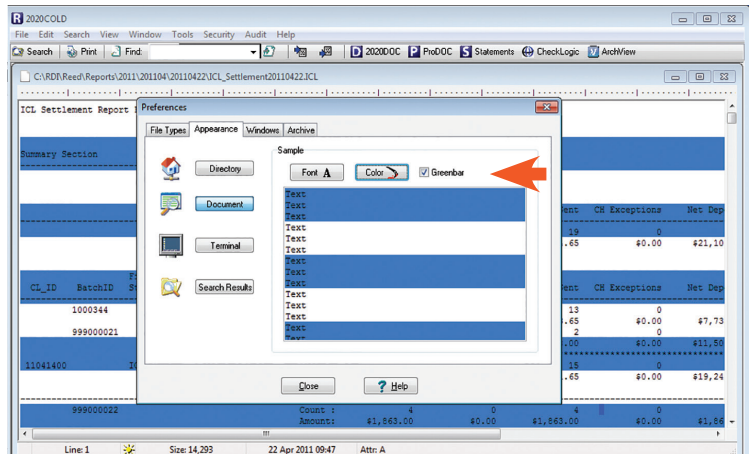
Windows

The Windows tab allows the user to choose how the windows will open in Reports.

When displaying one window at a time (by choosing **Closed** or **Minimized**), the **New windows are shown** will have the following characteristics:

>   **Full screen**: No window border.
>   **Overlapped**: Medium-sized window with border.
>   **Tiled**: Full screen but with small border.

When displaying multiple windows (by choosing **Left Open**) the **New windows are shown** will have the following characteristics:

>   **Full screen**: No windows border and files will display on top of each other.
>   **Overlapped**: Cascaded medium-sized windows with borders.
>   **Tiled**: All windows will be displayed with equal screen space.

Close exits **Preferences** and returns to 2020COLD Reports.

Help will take the user to the help section embedded in the software.

The Directory Tree is always open. If the user clicks the **X** to close the Directory Tree, it will be minimized and will reappear if no other windows are open.

Archive

Enter a number into the **Archive every ... days** to automatically archive Reports.
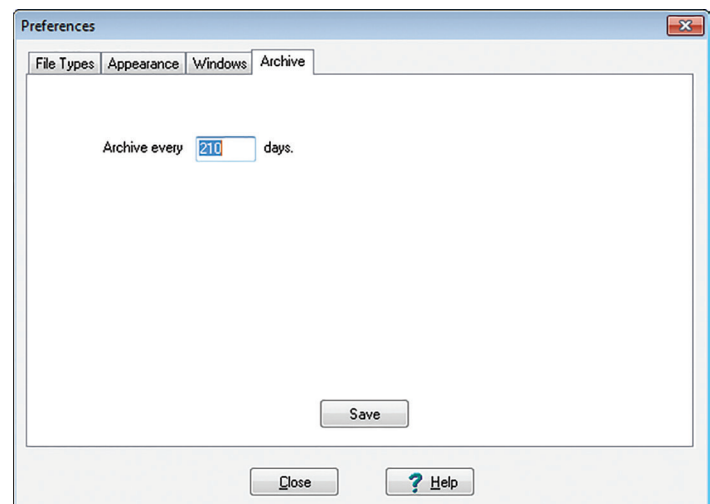
Configure Other Programs

2020COLD can be configured to launch other eDOC or Windows applications from Reports. To launch other utilities such as Statements, select **Tools | Configure**. Enter the name of the utility (e.g. Statements) and the command line (program EXE path) that will launch the utility with the <username> <password>.

Click on the **Save** button and the application icon will appear in the toolbar.
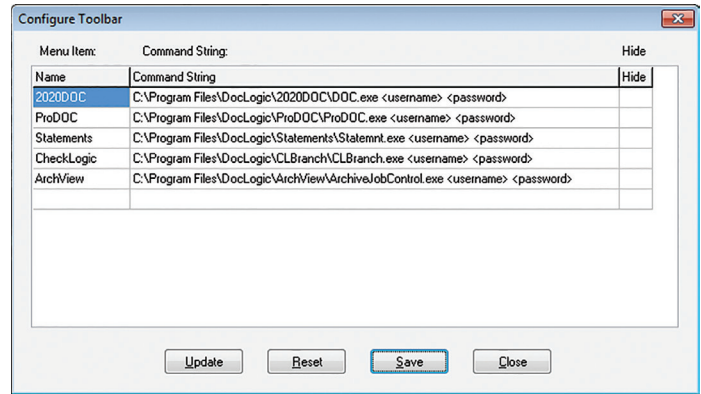
Clicking on **Update** will open the following confirm box.

Clicking on **Yes** will automatically locate other DocLogic Suite applications and adds them to the quick-launch toolbar and Tools menu. Clicking on **No** will close the confirm box with no updates.

The **Reset** button reloads the settings from the last saved configuration.

Clicking on **Close** will close the window without changes.
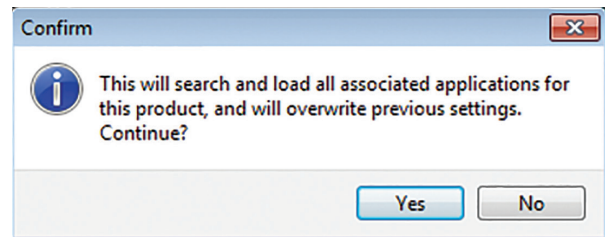
Search Reports

There are three ways to access the **Search for Files** dialogue box. 1.) Click on the **Search** button on the **Menu Bar**, 2.) go to **File | Search** from the **Main Menu,** or 3.) click on the **Search** button on the **Main Menu.**
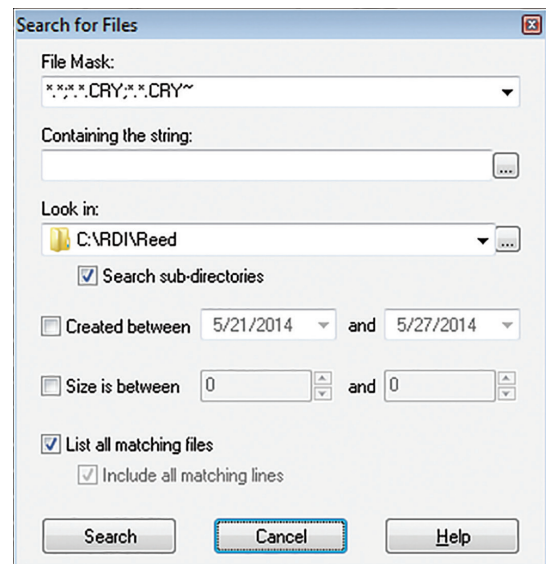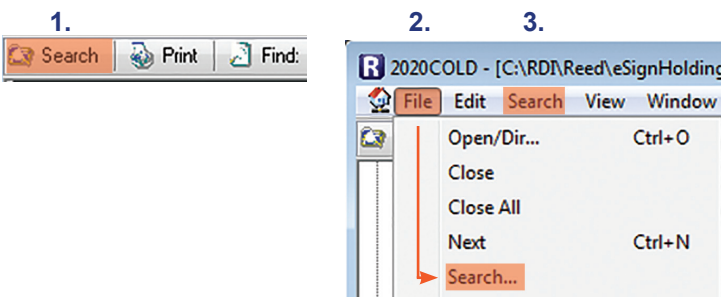
Search on the **Main Menu** (3.) will open a **Define Searches dialogue box** to allow the user to **Modify** or **Delete** an existing search or to create a **New** query.

Selecting **Modify** will open the **Search for Files** window to allow changes to the highlighted search.

Delete will delete the highlighted search.

New will open the **Search for Files** window to allow the user to define a new search.

Help will take the user to the **Define Searches** help section embedded in the software.
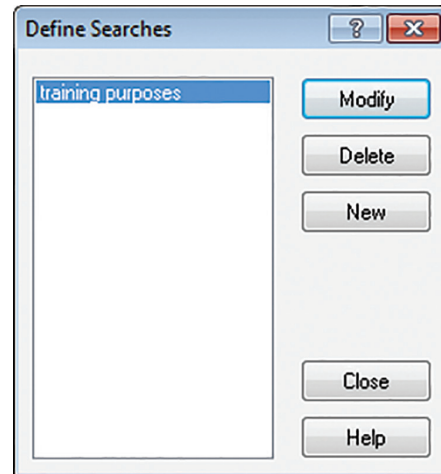
The **Query Name** box will appear in the **Search for Files** dialogue box only when access through the **Main Menu Search** function.
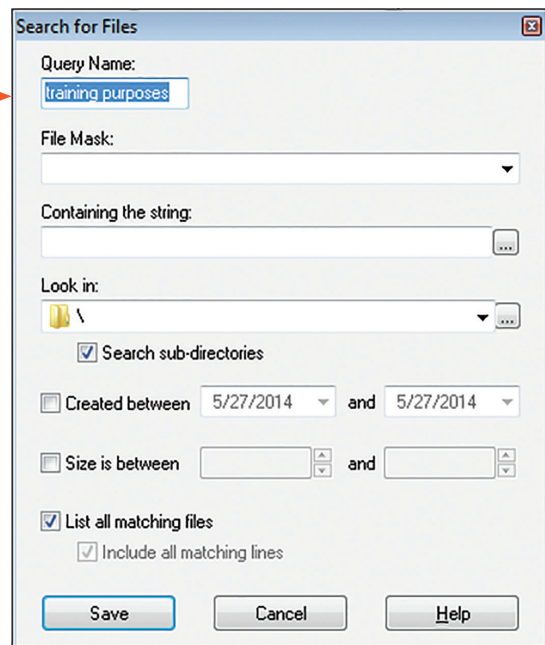
|	
Query Name	Enter the name of the predefined search.
File Mask	Enter parameter to narrow search. *.rpt narrows the search to rpt (report) files only.
Containing the string	Enter specific text to search, such as an account number.
Look in	Enter directory path or The usual places from the dropdown to search in specific folders.
Search sub-directories	Check to include sub-directories in the search.
Created between	Check and enter dates to limit search to time frame.
Size is between	Check and enter number to limit search to size (range is 1 to 100 bytes).
List all matching files	Check to have the search report list all files matching criteria.
Include all matching lines	Check to have search list all lines that match the **Containing the string** criteria.
Save	Preserves all the criteria specified in the defined search.
Cancel	Closes the window without saving.
Help	Takes user to the help section embedded in the software.

Print Reports

Print Window

To print a report either click on the **Print** button on the **Menu Bar** or go to **File | Print** from the **Main Menu**. Both will open the Print dialogue box where the user can select the printer to be used from the **Name** dropdown and specify print parameters such as pages to print and number of copies.

The Properties button opens the printer properties window. Properties selections are specific to the printer used. Tabs available in the Properties window are specific to the selected printer.
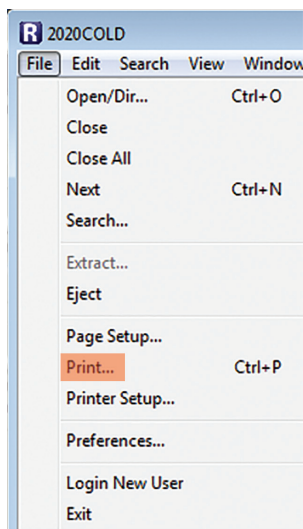
Selecting either function on the left will open the **Print** window on the right.

Click **OK** to print. Click **Cancel** to close the window without printing.
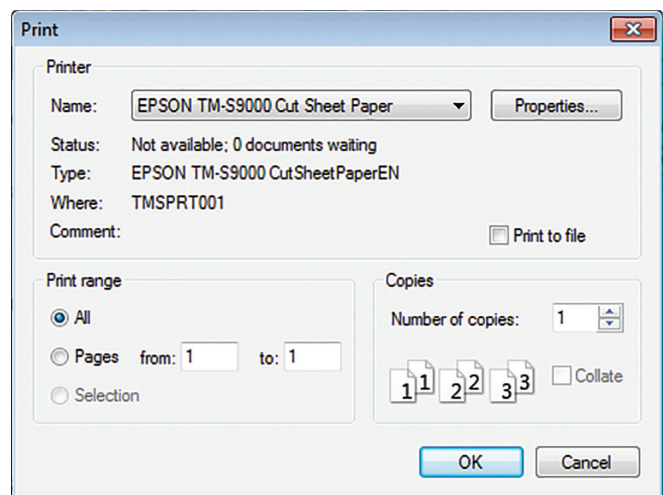
Page Setup Window

To set a page's margins, headers and footers, go to **File | Page Setup**. Specify the criteria that will be used to format a report for printing.

Enter **Margins** for the page.

Any text may be entered into the **Header and Footer** text boxes. Add codes listed below after the text to specify text placement or to add the code information; ie, date and time.

- &l   places text on the left margin.
- &c   centers text between margins.
- &r   places text on the right margin.
- &p   inserts page number.
- &c   inserts file name.
- &d   inserts date
- &t   inserts time
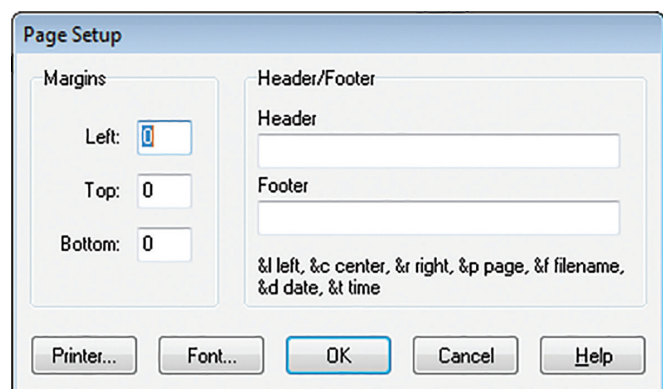
Help will take the user to the **Page Setup** help section embedded in the software.
OK closes the window and saves the settings.
Cancel closes the window without saving.

The **Printer** button on the **Page Setup** window opens the **Print Setup** window. The **Name** dropdown window will allow the user to select a printer from those installed. Specify print properties such as paper size/source and orientation.

The **Properties** button opens the selected printer's properties window. The selections available in this window vary and are specific to the printer installed and selected.

OK closes the window and saves the settings.
Cancel closes the window without saving.
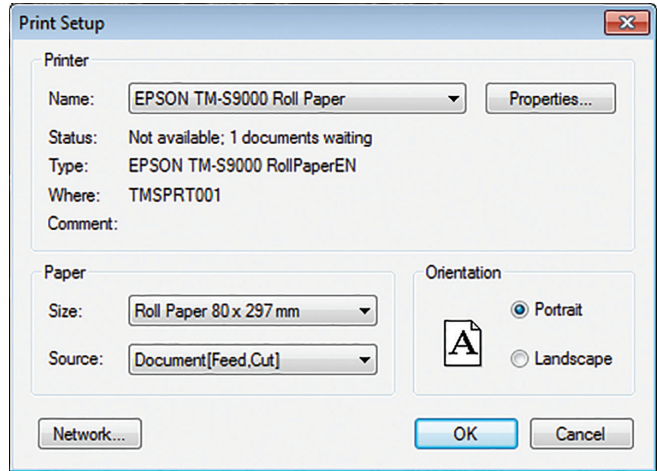
The **Network** button will open the network printer to allow a user to connect to one of their listed Network printers.

The message at the top of the page reads:
Please select the network printer you want to use and click Select to connect to it.

Click **Cancel** to exit the printer network window.
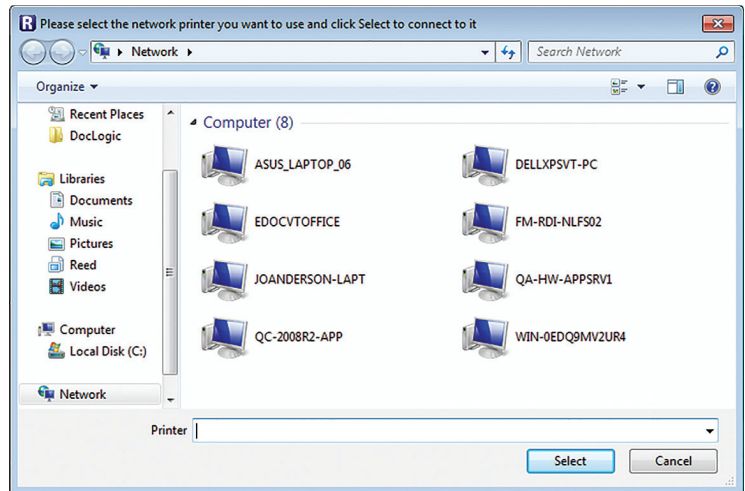
The **Font** button allows the user to specify the font face, style, size and color of the text. It further allows for **Strikeout** and **Underline** effects.

For column alignment, a mono-space font is required. Courier New is recommended but Terminal and Lucinda Console are also acceptable.

OK closes the window and saves the settings.
Cancel closes the window without saving.
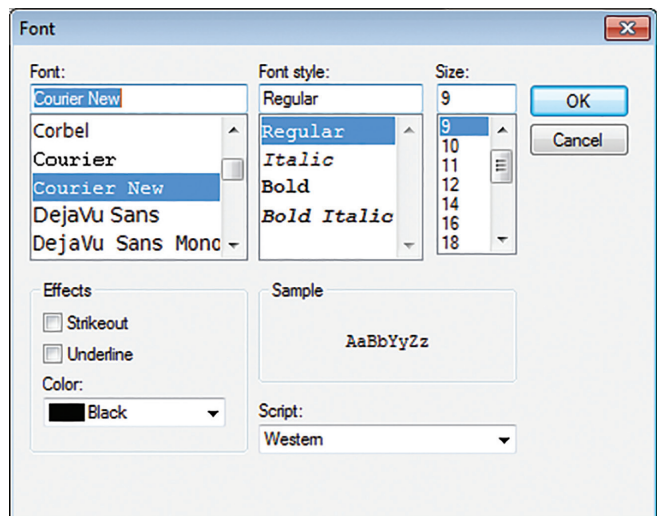
View Reports

View controls how reports are displayed and what window elements are visible.
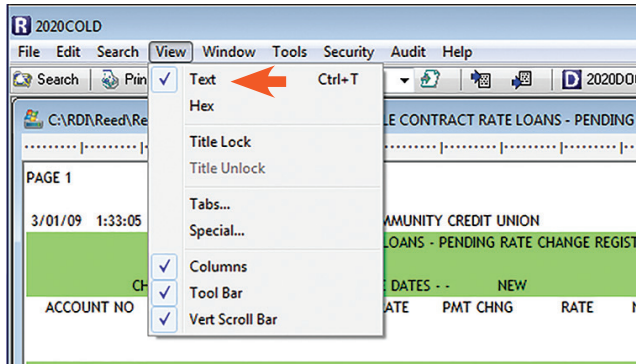
Text displays the file in text mode.
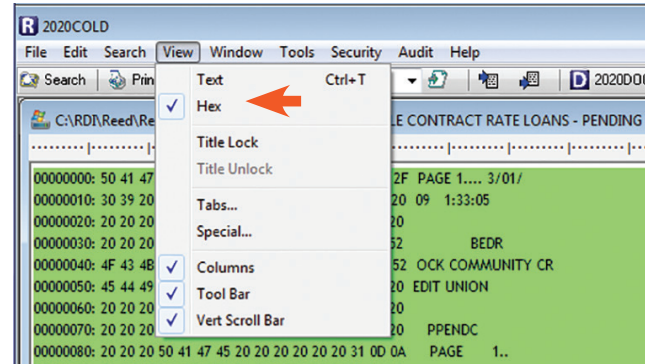
Hex displays file in hexadecimal.

Title Lock freezes the title line/s at the top of the report for scrolling.

Title Unlock unfreezes the title line/s.

Columns, if checked, will display a ruler denoting columns.

Tool Bar, if checked, will display the 2020COLD Reports toolbar.

Vert Scroll Bar, if checked, will display the Vertical Scroll Bar.

Tabs will display the **Tab Stops** window where a user can set the tab stop spacing. Enter the **Tab spacing** number desired. Click **OK** to accept changes. Click **Cancel** to exit the window without saving changes.
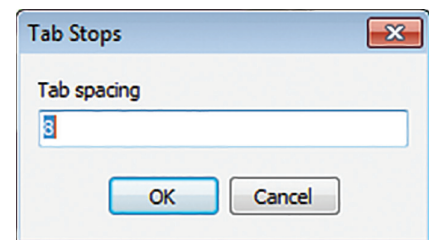
Special opens **View Special**.

- **CR** changes all carriage returns to a line feed and a carriage return.

- **All 256 chars** displays a printable character (usually a square) for non-printable characters.

- **Show CR/LF** displays the non-printable CR/LF characters as a printable character (usually a square).

Click **OK** to save changes. **Cancel** to cancel changes. Click **Help** to go to the help section of the software.
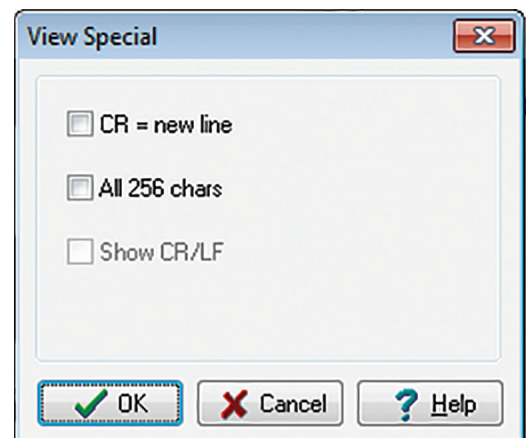
Viewing and Adding Notes

To Add, Delete or View notes select **Edit | Note** from the main menu. If there are any notes in the open document, the notes will be visible when **Note** is selected.

To Add a note, place the cursor on the line where the note is to be attached. Select **Edit | Note | Add** from the main menu and a note window will appear. Type the text of the note. Save and close the note by clicking the red [X] close icon. The line this note is attached to will turn yellow and the first 20 characters of text will be the name of the note.

The note will appear in the Note dropdown and can be opened to view from this menu, or simply click on the yellow line in the document to open the note.
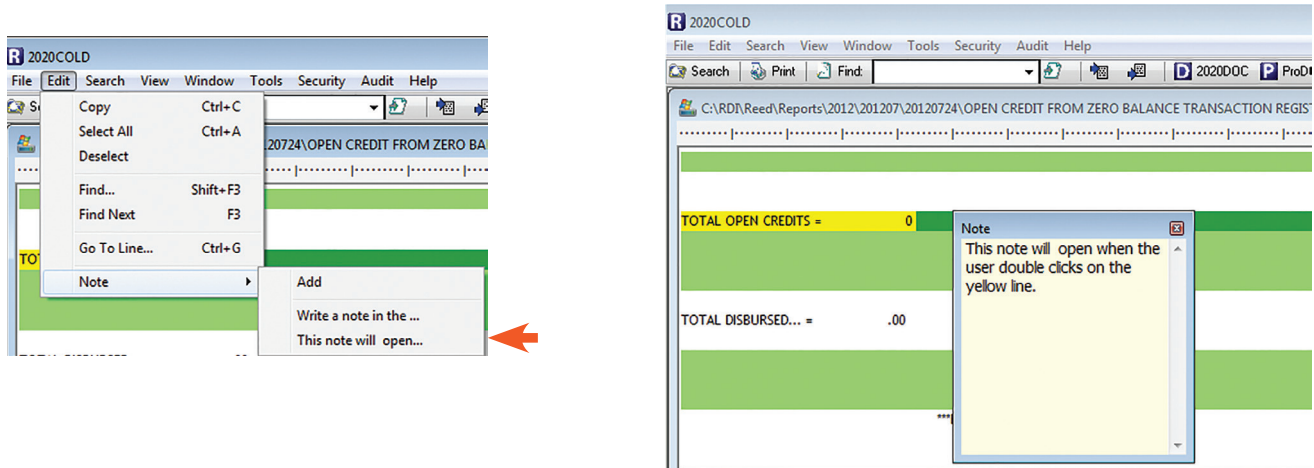
Extracting Zip Files

To extract zip files, go to **File | Extract**. This will open the **Extract Files** window.

Enter the directory path where the files are to be placed. Check the **Overwrite** option to overwrite any existing files without prompting.

Click **OK** to extract. Click **Cancel** to cancel the extraction. Click **Help** to go to the help section of the software.
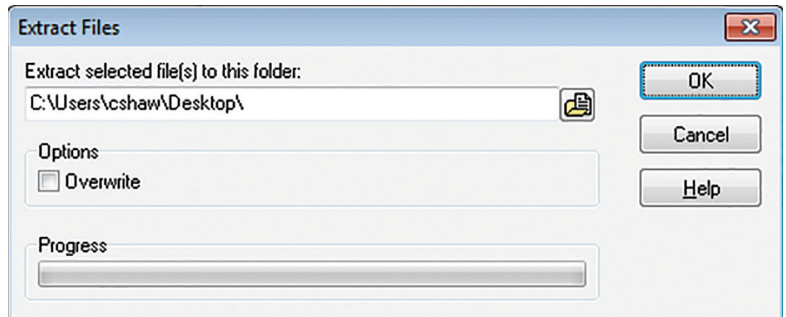
Ejecting Discs

Highlight the name of the DVD or CD from the directory in the left column of the window. Select **File | Eject** to eject a DVD or CD from the drive.
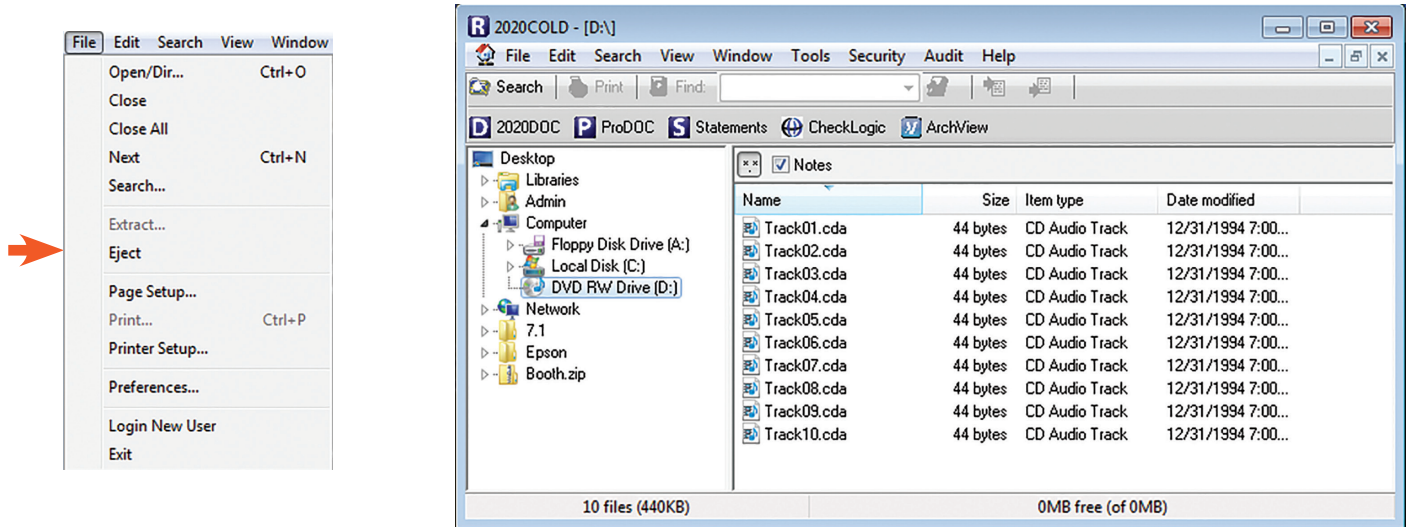
Audit

Searching through logs provides detailed information for audit purposes. **Access Log** and **Change Log** show details on who, how and when the software was accessed or changed. When **View Log File** is opened through **Access Log, t**he log will contain a list of all accesses to the program. When **View Log File** is opened through **Change Log**, the log will contain a list of all changes to the program. Log information is recorded in the **History** tab. The Detail tab will give details of the selected log from the list in the History tab.

From the **Audit** menu Click **Access Log** or **Change Log**.

Find

Click on **Find**. The **Find Date** window will open. Enter date and click **OK**.
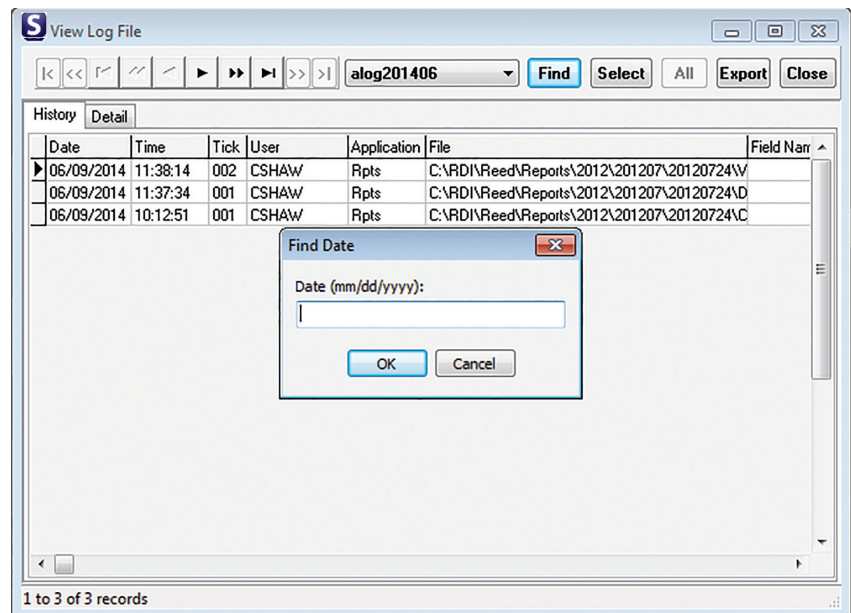
The **Detail** tab displays information about the log selected in the History tab. To see the details a user may double click the entry on the **History** tab or select the **Detail** tab.

The **Before** field shows what was in the field before changes. The **After** field shows what was in the field after changes.
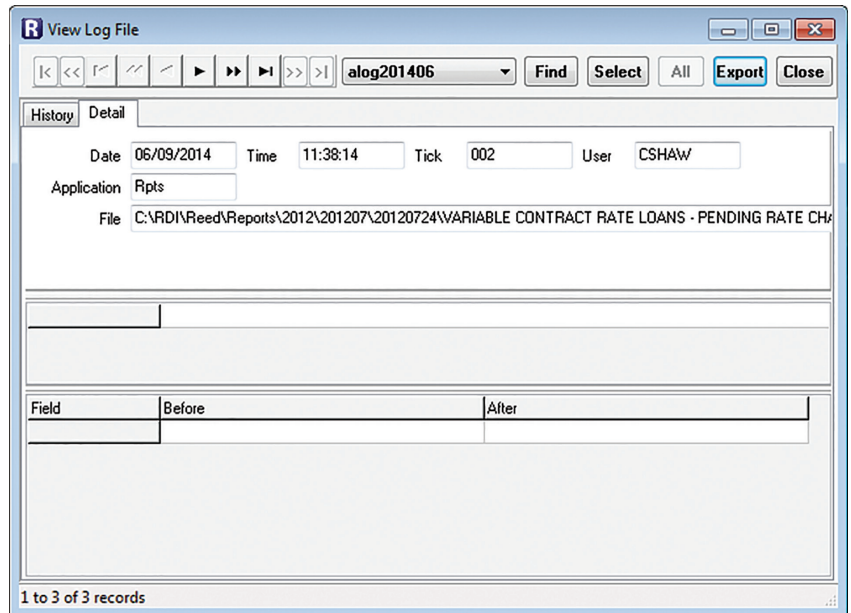
Select

Clicking on Select will open the Select Records window. All **Fields** from the log will be listed here.

Highlight the specific date and click **Select**.

Use the **Field** elements to specify the search criteria.

Match will allow the user to specify how closely the criteria inserted into the **Value** box is to be matched.

Check **Exact Match** for an exact match.

Check **Select Non-Matching Records** if the selected records do not contain the criteria inserted into **Value**.
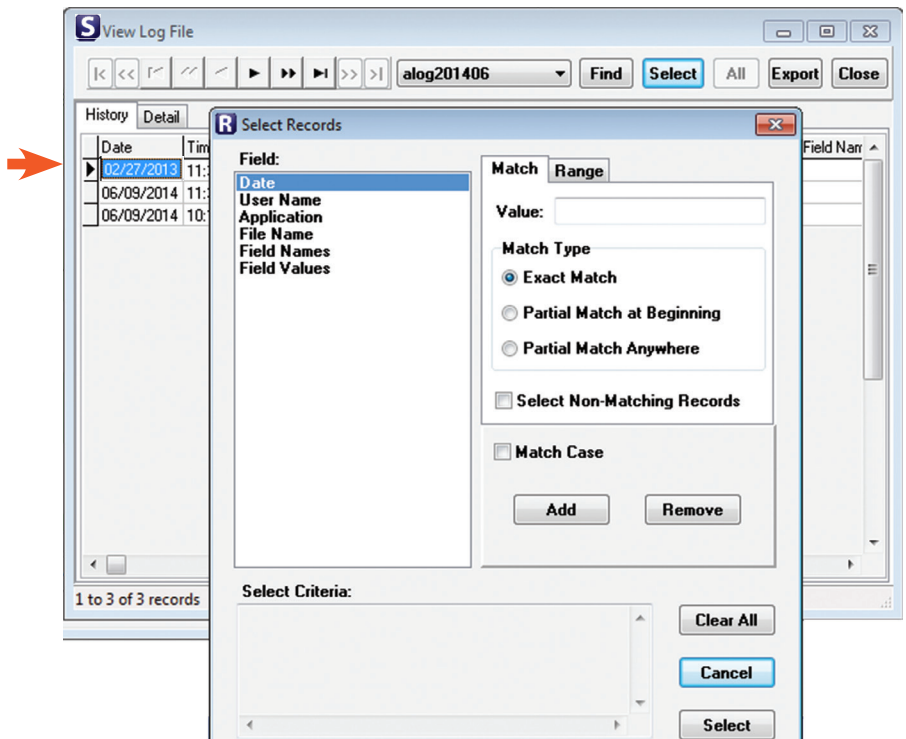
The **Range** tab on the **Select Records** window will allow the user to specify a value range for a specific field.

Add inserts selected **Fields** to **Select Criteria**.

Remove deletes everything from **Select Criteria**.

Clear All deletes everything from **Select Criteria**.

Cancel exits the **Select Records** window.

Select performs the search based on the **Select Criteria**.
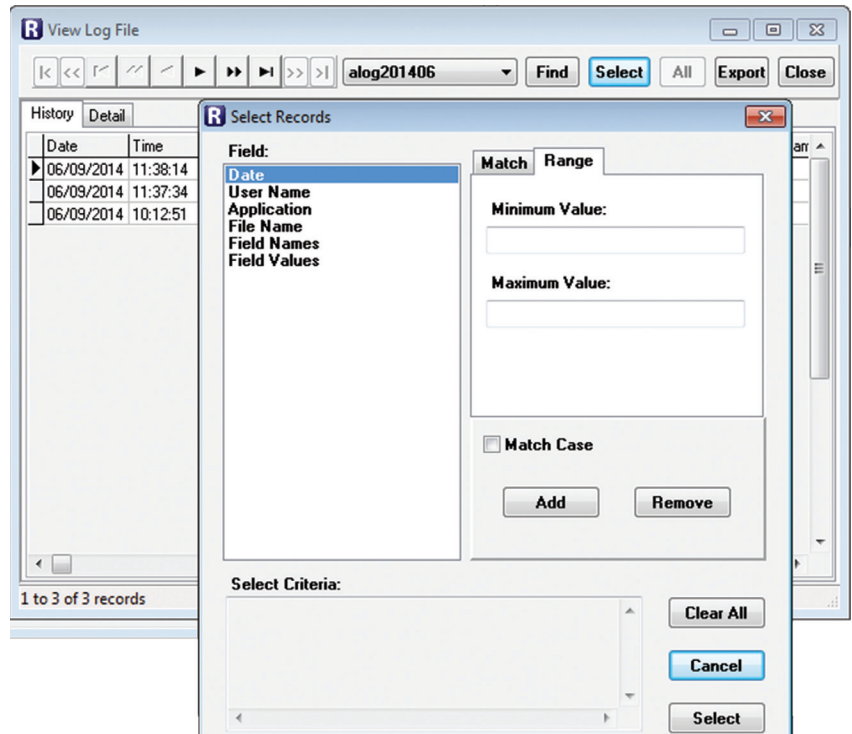
All, from the **View Log File,** will highlight once a user has narrowed the results of a search. Clicking on **All** will return the user back to the list of log items.

The **Export** tab on the View Log File window will open the **Export Table Data to Comma Separated File**. Choose the Output Filename by clicking on the ellipsis. Using the arrows from the Available Fields: box select fields and their order that will be included in the export.

If **Field Names** are column headers, check the **Include Field Names as Column Headers** box.
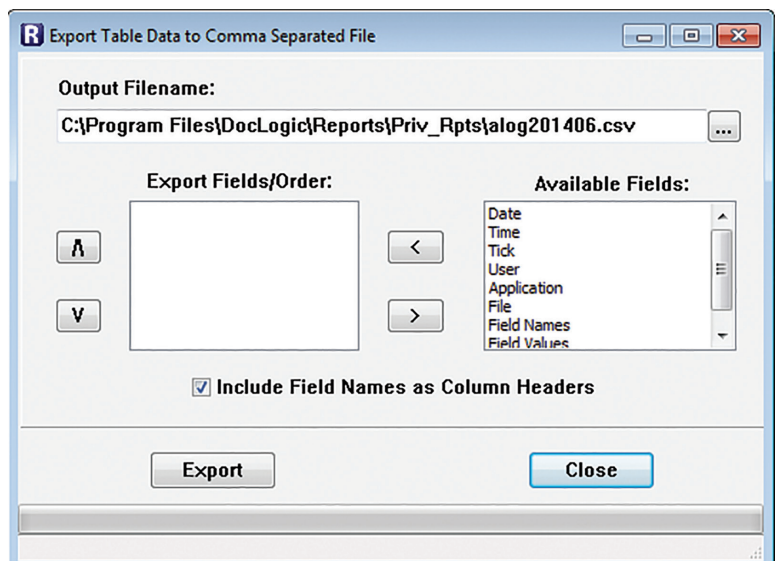
Windows Menu
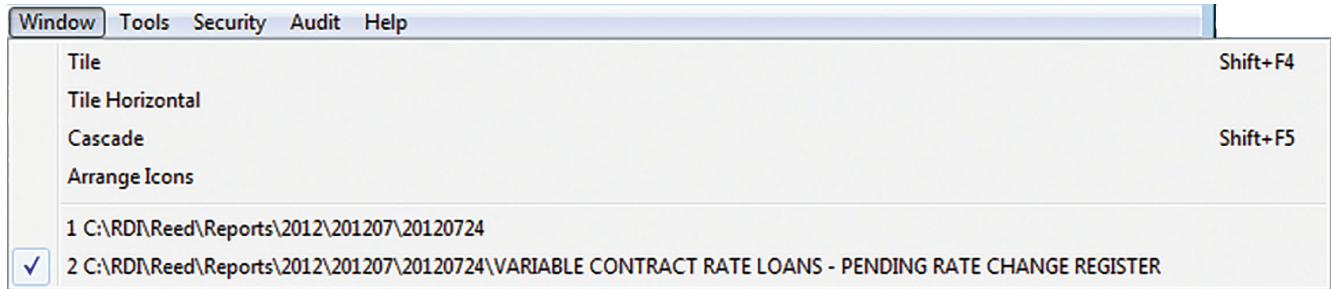
Tile	Displays two open files side by side.
Tile Horizontal	Displays two open files top and bottom.
Cascade	Displays open files in a step down manner.
Arrange Icons	Re-arranges minimized files at the bottom of the window

Tool Menu
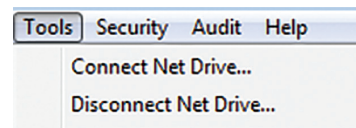
Connect Net Drive opens the **Map Network Drive** window where a user may map a drive to his system.

Select **Drive** from the dropdown and browse to select a **Folder**.

Check **Reconnect at Login** or **Connect using a different credentials**.

Click **Finish** to complete mapping or **Cancel** to cancel the operation.
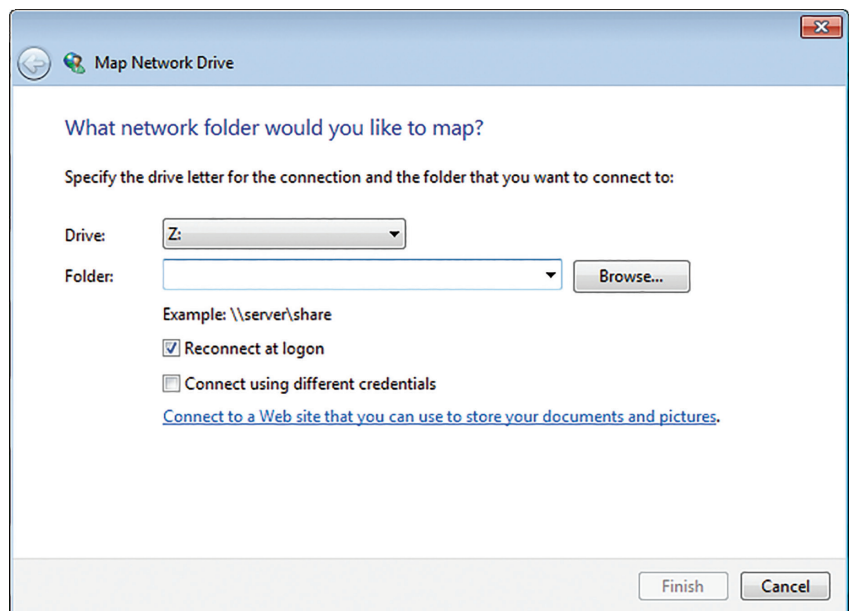
Disconnect Net Drive opens the Disconnect Network Drives window where a user may remove a network drive.

Network drives that have been connected will show up in this window. Select the network you want to disconnect and click **OK**.
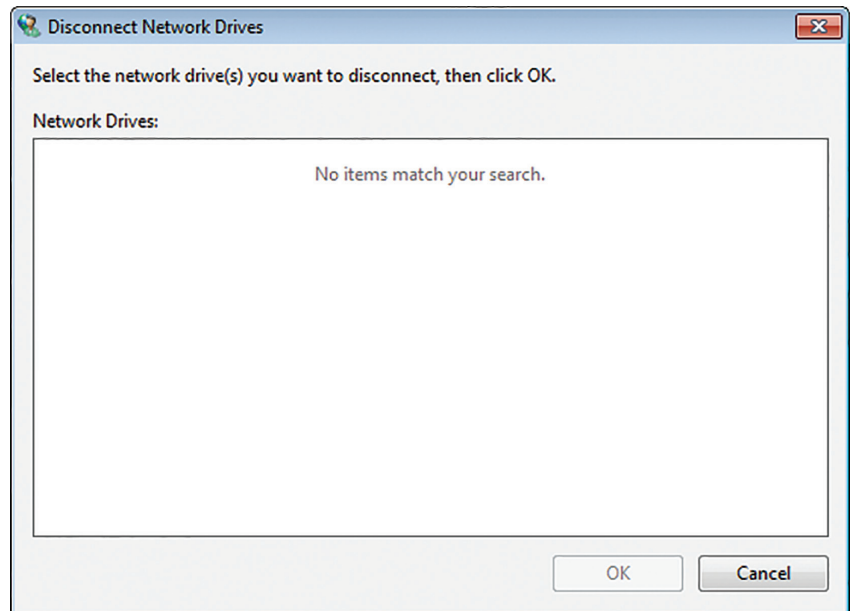
Renamer and AutoRenamer

Part of your comprehensive solution for managing report data using 2020COLD Reports is an executable called **Renamer**. Your organization may be using either the base application or the **AutoRenamer** version which includes automatic Service and Administration. If you are not currently using AutoRenamer talk to a Client Support Representation; it may work better for you. Renamer and AutoRenamer User Manuals can be found in our Client Center at http://edoclogic.com/client-center-login/

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