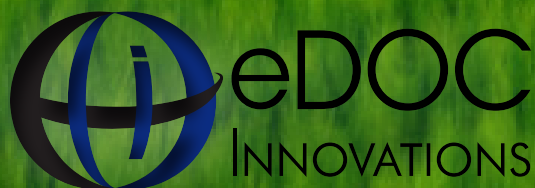


Renamer™



user guide



Core Image Processing — When Strategy Matters

edoclogic.com 800.425.7766
1197 Exchange St. Middlebury, VT 05753



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.

DISCLAIMER

eDOC Innovations, Incorporated (EDI) makes every reasonable effort to ensure the accuracy of the material described herein. EDI, however, makes no warranty, expressed or implied, with respect to the quality, correctness, reliability, recentness, accuracy, or freedom from error of this document or the products it describes. EDI makes no representation or warranty with respect to the contents hereof and specifically disclaims any implied warranties of fitness for any particular purpose. EDI disclaims all liability for any direct, indirect, incidental, consequential, special, or exemplary damages resulting from the use of the information in this document or from the use of any products described in this document. Mention of any product does not constitute an endorsement of that product by EDI. Data use in examples and samples are intended to be fictional. Any resemblance to real persons or companies is entirely coincidental.

COPYRIGHT NOTICES

Copyright © 2013 eDOC Innovations, Inc. All Rights Reserved. No part of this document may be reproduced, copied, stored in a retrieval system, or transmitted in any form by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written consent of eDOC Innovations Inc.

TABLE OF CONTENTS

Introduction.....	4
System Requirements	4
Installation	4
Launch Renamer.....	4
Renamer Main Screen.....	5
<i>Source Files</i>	5
<i>Output Files</i>	5
Main Screen Functions	5
<i>Add & Remove Folders</i>	6
<i>Setup</i>	6
<i>Report Names</i>	7
<i>Date Formats</i>	8
<i>Logs/Errors</i>	9
<i>email options (this is optional)</i>	9
Starting Renamer.....	10
<i>Path to Primary (top-level) Report Folder</i>	10
<i>Date Folders</i>	11
<i>Specify Dates</i>	11
<i>Start Naming Reports</i>	11
Managing Renamer.....	12
About.....	12
Technical Notes	13
Command Line Interface.....	13
Index	14

INTRODUCTION

Renamer is designed to make managing reports easier. When used in conjunction with 2020COLD Reports, Renamer provides a complete and easy-to-use report archival system that can be used in any organization, small to large, where reports are created for multiple organizations.

Renamer provides the following functionality:

- Automatically renames reports based on the text within a report.
- De-concatenating breaks large files into individual report files for faster and easier locating.
- Automatically moves reports to the archival directory.
- Automatically creates folders.
- Detailed log activity with emails notification and exception folders.
- Through an optional command line interface Renamer can be scheduled to run automatically.

SYSTEM REQUIREMENTS

- Windows 7 Pro or higher
- Core i3 or higher processor
- 4 GB RAM
- Sufficient storage for your reports (typically stored on a file server for later retrieval).
- Network connection to your host data processing system.
- Optional email notification requires email connection.

INSTALLATION

Renamer is easily installed by running the **Renamer Setup.exe**. It is recommended that you use the default installation locations.

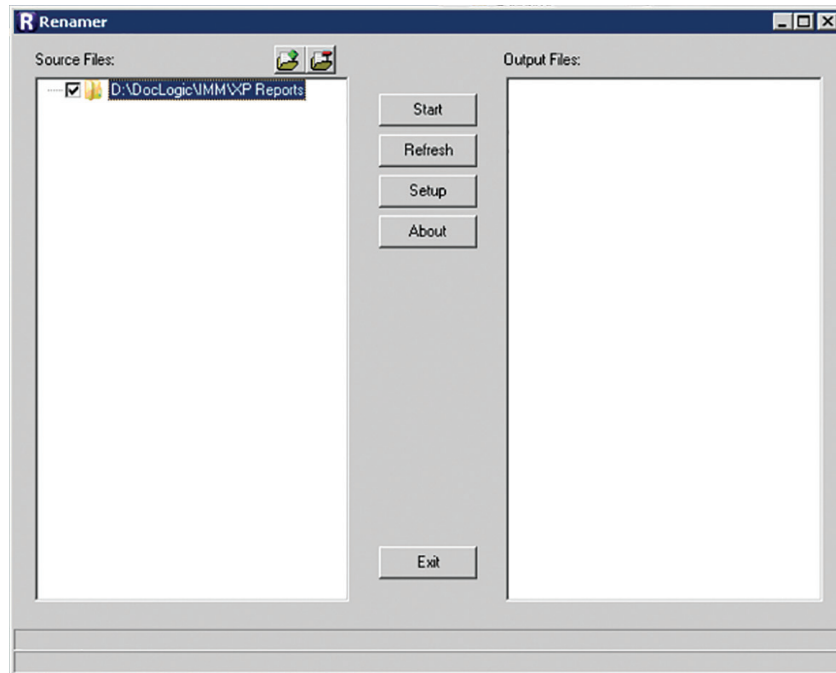
LAUNCH RENAMER

To launch Renamer, double-click on the Renamer icon.



RENAMER MAIN SCREEN

Once the program is launched, **Renamer** will open to its main screen. This screen displays the **Source Files** on the left and the **Output Files** on the right.



Source Files

Files from your host data processing system will need to be transferred to a file server or PC for processing. Specifying where Renamer will look for these files is necessary. By default, all files in a checked folder will be selected for renaming. To deselect a report, uncheck the box to the left of the folder.

Output Files

Once the renaming process begins, a real-time scrolling log of reports as they are being renamed will appear in the Output Files window.

MAIN SCREEN FUNCTIONS

Clicking on the **Start** button will open the **Start** window.

Clicking on the **Refresh** button will redisplay items placed in the input folder.


Clicking on the **Setup** button will open the Setup window for entering report names, date formats, etc.


Clicking on **About** will open the **About Renamer** window to find more information about Renamer.

Clicking on **Exit** will close the screen and exit the program.

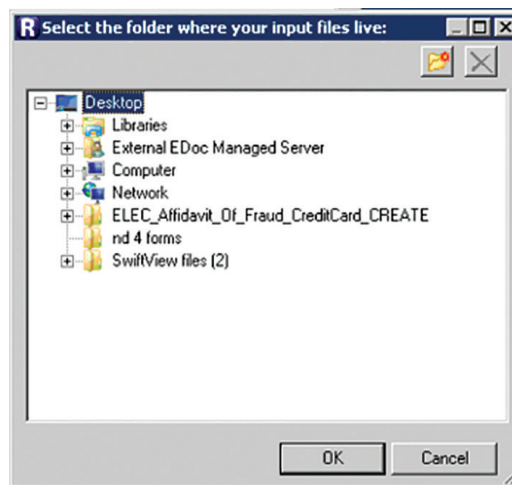
Clicking on the green plus or red minus **report folder buttons**   will add or remove folders from the list.

Add & Remove Folders

To add a folder to the list, click on the green plus folder button . This button will open the **Select the folder where your input files live** window. Select a new location for Renamer to search for reports or click on the yellow folder icon in this window to add a new folder.

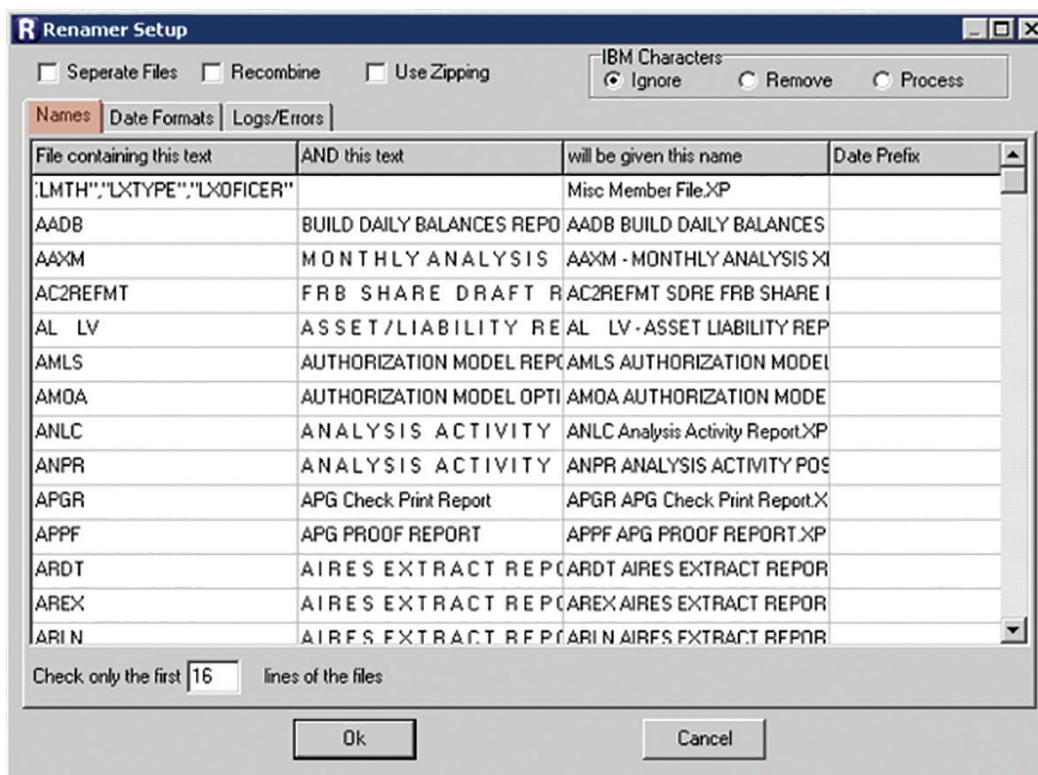
To remove a folder from the list, select to highlight the folder to remove, then click on the red minus sign folder button . This will remove the highlighted folder and its sub-folders.

Click **OK** when finished to save changes. Click **Cancel** to close the window without saving changes. Clicking on OK or Cancel will bring back the main screen.



Setup

Click on the **Setup** button from the **main screen** to enter report names, date formats, e-mail addresses, and log file locations.



Report Names

Use the **Names tab** to specify the text for Renamer to match in each report and corresponding files. Renamer can match up to two blocks of text on the same line. Users can specify how many lines in the file to check for this text by entering a number into the **Check only the first...lines of the files**. Below are the fields used for entering information about the reports. Click on the heading to sort the column.

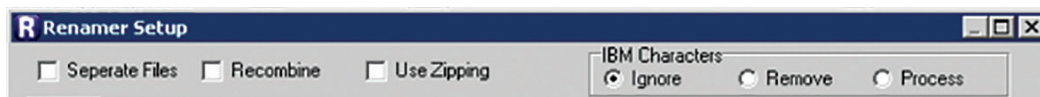
Enter text for Renamer to search in **File containing this text** field.

If the text in the **File containing this text** is not unique, enter additional text in the **AND this text** field to differentiate the reports.

Enter the name that the report will be renamed in the **will be given this name** field. The report name that you enter in this column can have a file extension. Renamer will accommodate any syntactically-legal file name.

Clicking on **Date Prefix** will open a dropdown box of date formats (see **Date Formats table** page 8).

If multiple reports are in one file, include each report in the **Names** list and check the **Separate Files** box. The order of the reports in the Names list is not important.



Checking the **Separate Files** box will separate combined reports into individual files as part of the renaming process. This option can slow down operations if files are already separated since it requires Renamer to go through the whole file to find out if there is more than one file present.

Checking the **Recombine** box during the renaming process will combine files that share the same destination name. If this option is not checked, then Renamer will append a number to the file name if there is a file already with that name.

Checking the **Use Zipping** box will compress the renamed files.

The **IBM Characters** radio buttons will tell Renamer to ignore, remove, or process these characters when it is processing a file.

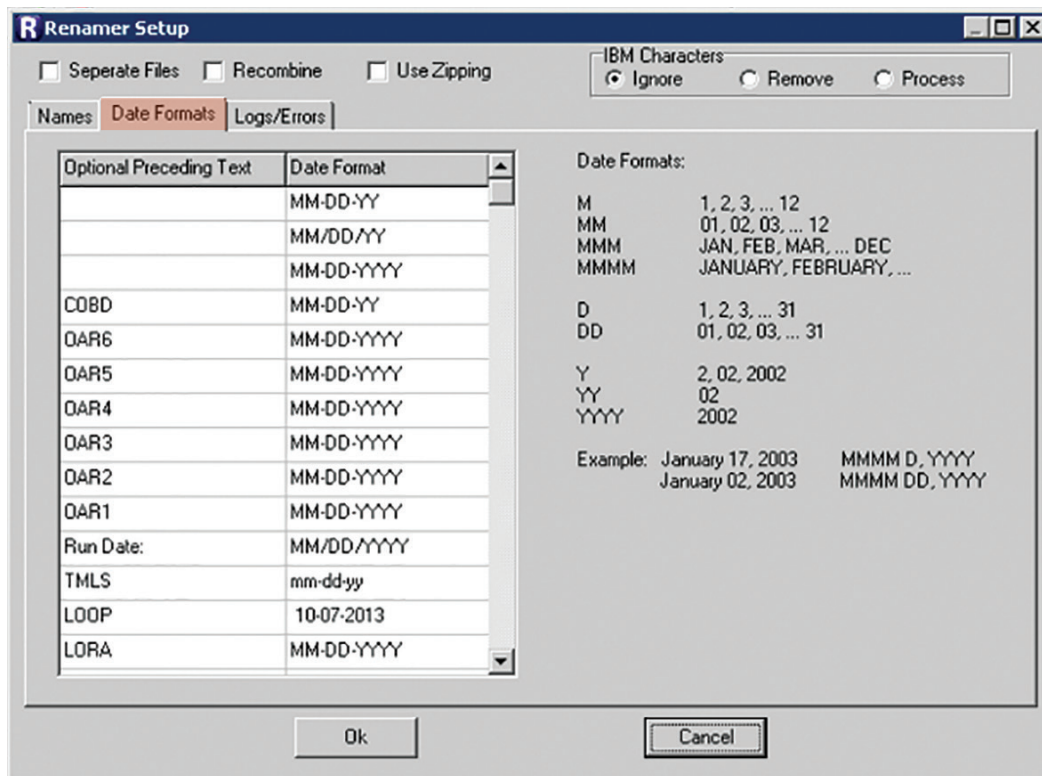
Click **OK** to rename reports. Reports that cannot be renamed will be saved in the **exceptions folder** (see pages 9 and 12 for more information about exception folders).

Date Formats

Renamer looks for a date within each report in order to know which folder to place the renamed reports. Sometimes, within the same report, there are multiple dates or different date formats. To determine the correct date of the report, Renamer uses the rules defined in the **Date Formats** table. Click on the **Date Formats tab** to view or change the date rules.

If the report has multiple dates within it, differentiate the date by entering the exact word or words preceding the date in the **Optional Preceding Text** field. The **Optional Preceding Text** allows for a search string to find the date instead of the first matching option. One example would be a report that has two dates separated by the word “at”. The word “at” would be typed into the Optional Preceding Text and the date format of MM/DD/YY would be typed into the Date Format field.

Enter date formats in the **Date Format** field. Acceptable date formats are shown to the right.



Click **OK** when finished to save changes. Click **Cancel** to close the window without saving changes.

Logs/Errors

Click on the **Logs/Errors tab** to open the **Log/Errors** window. Specify the location for the log files and exception reports. This is also the screen to setup optional email notifications.

Specify the path to the folder in the **Exception folder** field where Renamer will save the files that cannot be renamed. Use the browse button to the right of the field to navigate to this folder.

Specify the path to the folder in the **Log file folder** field where Renamer will save the log file. Use the browse button to the right of the field to navigate to this folder.

email options (this is optional)

- **E-mail log file to** - Enter up to 3 email addresses that logs will be sent to.
- **E-mail log file from** - Enter the sender name Renamer will display on the email message.
- **Mail Server Name or IP Address** - Enter the name or IP address of the SMTP mail server.
- **Login required** – Check this box if the mail server requires a login.
- **Username** - Enter the mail server login name.
- **Password** - Enter the mail server password.

Click **OK** when finished to save changes. Click **Cancel** to close the window without saving changes.

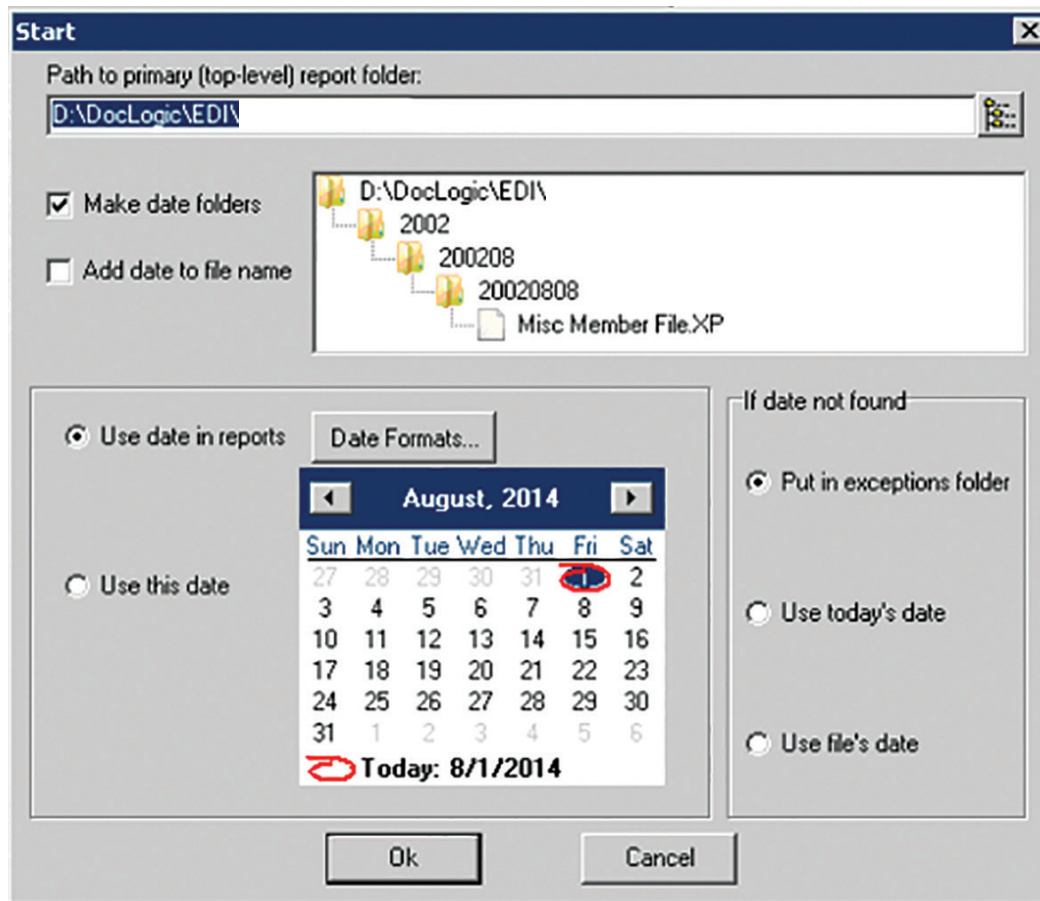
The screenshot shows the 'Renamer Setup' dialog box with the 'Logs/Errors' tab selected. The dialog has a title bar with 'R Renamer Setup' and standard window controls. Below the title bar are three checkboxes: 'Seperate Files', 'Recombine', and 'Use Zipping'. To the right is a section for 'IBM Characters' with three radio buttons: 'Ignore' (selected), 'Remove', and 'Process'. Below these are three tabs: 'Names', 'Date Formats', and 'Logs/Errors' (selected). The main area contains several input fields and checkboxes:

- 'Exception folder:' with a text box containing 'D:\DocLogic\EDI\CUA254\Reports\Exceptions\' and a browse button.
- 'Log file folder:' with a text box containing 'D:\' and a browse button.
- 'E-mail log file to:' with three empty text boxes.
- 'E-mail log file from:' with one empty text box.
- 'Mail Server Name or IP Address:' with one empty text box.
- 'Login required' checkbox, which is unchecked. To its right are 'Account name:' and 'Password:' labels, each followed by an empty text box.

At the bottom of the dialog are 'Ok' and 'Cancel' buttons.

STARTING RENAMER

Clicking on the **Start** button from the main screen will open the **Start** window.



Path to Primary (top-level) Report Folder

The **Path to Primary (top-level) report folder** is the top-level folder containing the renamed reports. Typically, it is a mapped drive for the end users.

Enter your primary report folder location in the **Path to primary (top-level) report folder** field or use the browse button to the right of the field to locate your primary folder.

Date Folders

If using other eDOC products, reports must be in date folders. To put reports in date folders, check the **Make date folders** check box. Renamer also can append a date to the end of the file name. Check the **Add date to file name** to append the date.

If **Make date folder** is checked, renamed reports will be stored using the following folder naming conventions:

Primary Report Folder – This is the top-level folder that is typically a mapped drive for the end users.

Year Folder - Uses the YYYY format. All month folders reside under the appropriate year folder

Month Folder - Uses YYYYMM format. All day folders for a month are located in the month folder.

Day Folder - Uses YYYYMMDD format. All reports are located within the appropriate day folder.

This directory structure makes finding reports easy, because the reports are always stored in date order. The structure also makes it easy to archive reports by month, quarter, or year.

Specify Dates

There are two methods to determine which date to use for the folder names and/or file names.

If the **Use date in reports** radio button is selected, Renamer will use the date found inside each report using the rules established on the **Date Formats** screen. To view or enter date formats, click on **Date Formats** from the **Start** window.

If files being named should go in a folder other than the date in the report, the option for **Use this date** can be checked. The files will be placed in the date according to the date selected on the calendar.

If the file date is not found, decide where to put the file by selecting one of the radio button options in the **If date not found** section: **Put in exceptions folder**, **Use today's date** or **Use file's date**.

Start Naming Reports

Once everything is setup correctly and verified, click **OK** to begin the renaming process. The main screen will appear and display a small green arrow next to the file that is being processed. In the **Output Files** window, a real-time scrolling log of reports will appear as they are being renamed. As each source file is processed it is removed from the list but not deleted.

Click **Cancel** to close the window.

MANAGING RENAMER

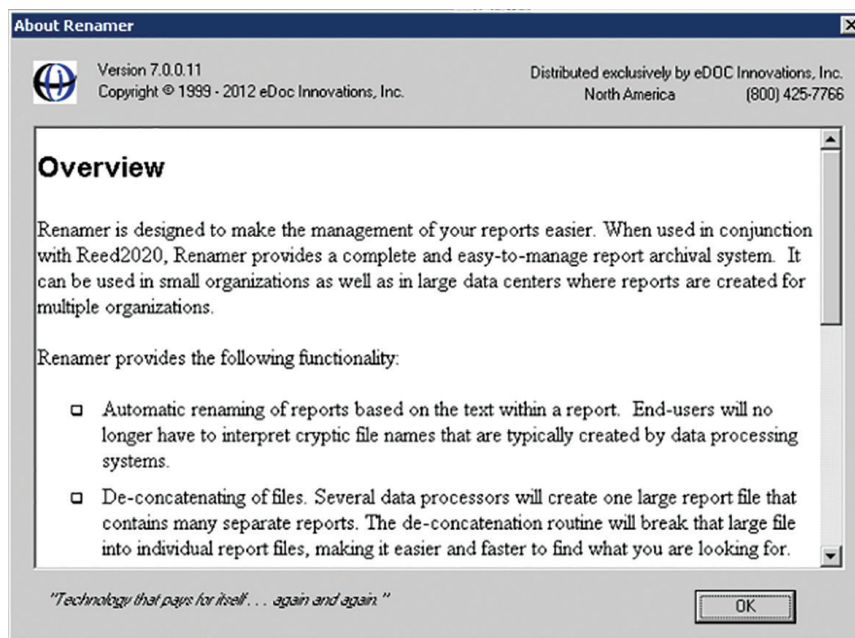
Once files have been renamed, there may be new reports that have been created since the setup of Renamer was complete or there may be files that have not yet been properly configured.

Files that end up in the **exceptions folder** will need to be reconfigured. To reconfigure, open the report in the 2020Cold Reports application and copy the header or any unique part of the report that can be used to search. If there are two locations that must be found to rename the file, place the second search criteria in the **AND this text** column. Now type the name the file will be given in the **will be given this name** column.

If the automatic date function is used, the **Date Prefix** also must be used. Look at the format of the date in the report and find any text that might be available to find the date format. Then click on the **Date Formats tab** to either verify that it already exists or to add the new date format.

ABOUT

Clicking on **About** from the main screen will open the **About Renamer** window where users can find more information about Renamer, the version being used and eDOC Innovations phone number to speak to one of our Client Service Representatives.



TECHNICAL NOTE

Command Line Interface

Renamer can be run as a non-interactive process (e.g. a scheduled task) using the following command line syntax.

```
RENAMER "input file(s)" "output folder" "date" "option"
```

“input file(s)” can use ? or * wildcards, e.g. *.* will rename all the files in a directory.

“date” is None, Auto, or MM/DD/YY. (The Auto parameter will use date found in the reports per the rules in the Date Formats setup screen.)

“option” is 1 to make date folders, 2 to add date to name, 3 for both, 0 for neither

Example:

```
RENAMER C:\IMPORT\A931108 R:\REPORTS Auto 1
```

INDEX

A

About 5, 12
About Renamer 5, 12
Add date to file name 11
Add & Remove Folders 6
AND this text 7, 12

C

Check only the first...lines of the files 7
Command Line Interface 13

D

Date Folders 11
Date Formats 8, 11
Date Formats tab 8
Date Formats table 8
Date Prefix 7, 12
Day Folder 11

E

E-mail log file from 9
E-mail log file to 9
Email options 9
Exception folder 7, 9, 12
Exit 5

F

File containing this text 7

I

IBM Characters 7
If date not found 11

L

Launch Renamer 4
Log file folder 9
Login required 9
Logs/Errors 9
Logs/Errors tab 9

M

Mail Server Name of IP Address 9
Main Screen Functions 5
Make date folder 11
Managing Renamer 12
Month Folder 11

N

Names tab 7

O

Optional Preceding Text 8
Output Files 5, 11

P

Password 9
Path to Primary (top-level) report folder 10
Put in exceptions folder 11

R

Recombine 7
Refresh 5
Renamer Main Screen 5
Report folder buttons 5
Report Names 7

S

Select the folder where you input files live 6
Separate Files 7
Setup 5, 6
Setup email notifications 9
Source Files 5
Specify Dates 11
Start 10
Start button 5
Starting Renamer 10
Start Naming Reports 11
System Requirements 4

T

Technical Notes 13

U

Use date in reports 11
Use file's date 11
Username 9
Use this date 11
Use today's date 11
Use Zipping 7

W

Will be given this name 7, 12

Y

Year Folder 11