

File Manager

Overview

The **File Manager** application automates file operations such as copying files to a network file server, moving old files to an archive folder, and compressing files into a single compressed folder for sending or storage.

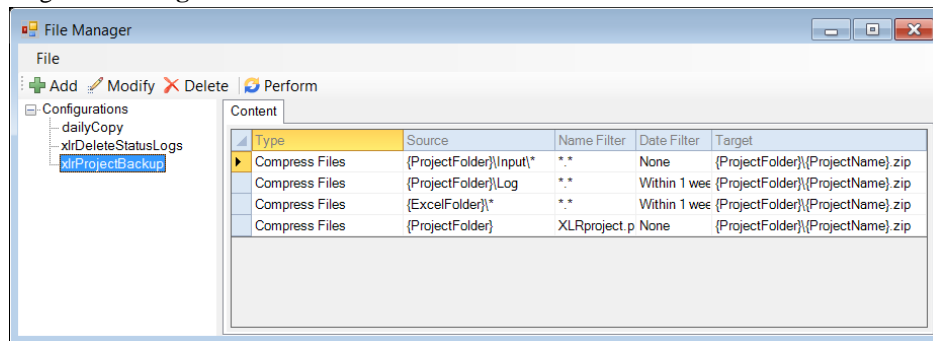
Pre-made configurations are provided with every new project.

The *xlrDeleteStatusLogs* configuration deletes any status log file older than 2 months.

The *xlrProjectBackup* configuration produces a compressed file of the active project. This configuration is used when the **Backup Project** option is selected from the **File** menu in the **Project Explorer**.

Both of these configurations can be edited as required.

The designer is opened from the **Project Explorer** on the right-side **Tools** tab in the **Distribute** section by selecting **File Manager**.



The display consists of menu options; a left panel of configurations and a right panel showing the content of the selected configuration.

To edit an existing configuration, highlight it on the list and click **Modify**. Note that if the configuration name is edited, then the settings of the configuration will be saved to this new name.

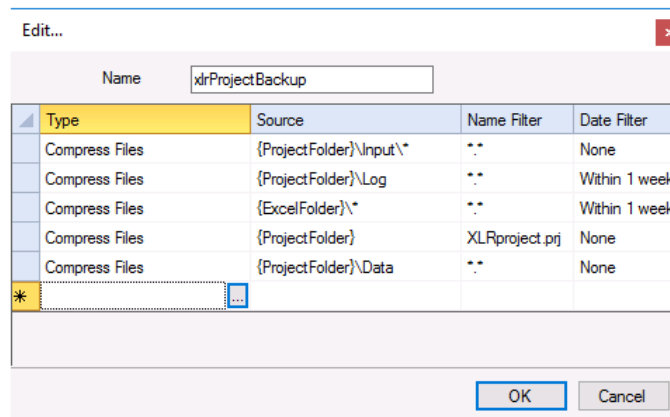
To delete an existing configuration, highlight it on the list and click **Delete**.

The steps required to implement **File Manager** are:

- Design a Configuration
- Deploy a Configuration

Design a Configuration

To add a new configuration, highlight **Configurations** and click **Add**.

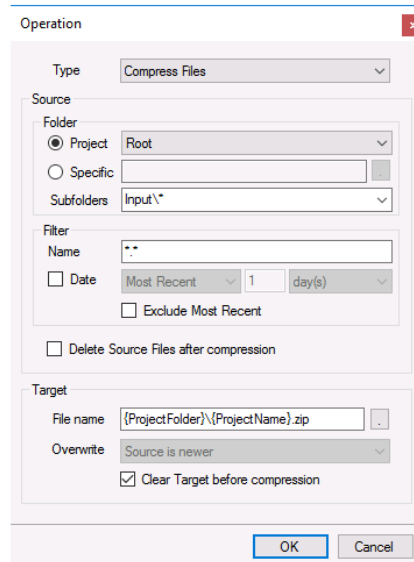


Enter a **Name** for the configuration and add file management operations to the grid by selecting an empty row and clicking the browse button (...).

To remove a file operation, highlight the row and press the **Delete** key on the keyboard or select **Delete** from a right click.

File Operation

A configuration consists of a list of operations.



- **Copy**
This copies all the files determined by the **Source** settings to the **Target Folder**.
- **Copy and Rename**
This copies the file determined by the **Source** settings and renames it to the **Target File name** specified. This only operates on a single file.
- **Delete**
This deletes all the files determined by the **Source** settings.
- **File Name to Variable**
This determines the most recent file based on the **Source** settings and stores that file name to the **XLReporter Register Variable** specified.

- **Move**
This moves all the files determined by the **Source** settings to the **Target Folder**, removing them from the original folder.
- **Compress Files**
This compresses all the files determined by the **Source** settings to a single file determined by the **Target File name** specified.
- **Compress Folders**
This compresses all the folder and files determined by the **Source** settings to a single file determined by the **Target File name** specified.

The **Source Folder** can either be a **Project** folder (*Excel, Web or PDF*) or a **Specific** folder in which can the browse [...] button is used to select a folder. When **Folder** is set to **Project**, **Subfolders** can be manually entered or selected from the drop-down list.

Example: To manage files for template *ABC*, which is configured to create subfolders, enter *ABC\2021\Jan* to select the reports for this template in January 2021.

In the case of a **Project** folder, **Variables** and **Name Types** can also be used in the **Subfolders** setting.

Example: To manage files for template *ABC*, which is configured to create subfolders for the Year and Month, **Subfolders** can be set to *ABC\{YYYY}\{MMM}*. When this is executed, *{YYYY}* and *{MMM}* are replaced with the current month and year (per the PC clock) for the file management operation configured.

The **Filter** determines which files from the **Folder** are considered. The filter **Name** can be a combination of hard coded text, wildcards (“*” for multiple characters), or “?” (for a single character). Files that begin with an underscore (“_”) are never considered. Function Variables such as **Registers** can be used in the filter field for further flexibility.

Example: To filter all the PDF files from the **Folder**, set the **Name** to **.pdf*.

Check **Date** to filter the files on the file modified date. This setting can be:

- **Most Recent**
The most recent file is considered.
- **Within**
All files *newer* than what is specified is considered.
- **Outside**
All files *older* than what is specified is considered.

Example: To perform operations on files dated within the last week, set the date filter to *Within 1 week(s)*. To perform operations on files dated more than 3 days ago, set the date filter to *Outside 3 day(s)*.

The most recent file satisfying the **Name** and **Date** settings can be excluded by checking **Exclude Most Recent**.

When the **Type** is set to *Compress Files*, checking **Delete Source Files after compression** deletes the **Source** files after they are added to the compressed file.

The **Target** is setting depends on the **Type** selected.

- **Folder**
This setting is available when **Type** is set to *Copy* or *Move*. If the **Folder** specified does not exist, it is created. Variables like *{YYYY}* and *{MMM}* can be specified as part of the **Folder**. To access the list of variables, right click and select **Insert Expression**.

- **File name**

This setting is available when **Type** is set to *Copy and Rename*, *Compress Files* or *Compress Folder* and determines the new name of the target file. This setting can be a fully qualified (C:\Reports\MyNewReport.xlsx), partially qualified (Production\MyNewReport.xlsx) or not qualified (MyNewReport.xlsx). If the setting is not fully qualified **Project Workbooks** folder is used. If the folder does not exist, it is created.

When **Type** is set to *Compress File* or *Compress Folder*, the file extension is not specified, it is defaulted to .zip.

- **Register**

This setting is available when **Type** is set to *File Name to Register* and writes the name of the most recent file to the **Register**.

- **Overwrite**

This setting is available when **Type** is set to *Copy*, *Copy and Rename*, *Move*, *Compress Files* or *Compress Folder*. With both *Compress* types, these settings apply to the files within the compressed file. This setting is disabled when **Clear Target before compression** is checked. The following settings are available:

Never

If the file exists in the **Target**, it is not overwritten with the **Source** file.

Always

If the file exists in the **Target**, it is always overwritten with the **Source** file.

Source is newer

If the file exists in the **Target**, it is overwritten with the **Source** file only if the **Source** file is newer based on file modified date.

- **Value**

When **Type** is set to *File Name to Variable*, this setting determines if the **Short name** (MyReport.xlsx) or the **Long name** (C:\Reports\MyReport.xlsx) of the most recent **Source** file is captured.

- **Clear Target before compression**

This setting is available when **Type** is set to *Compress Files*.

When checked, this setting indicates that if the compressed file exists, it is overwritten with a new compressed file every time the file management operation is performed. Otherwise, when this setting is not checked and the compressed file exists, the new **Source** files are added to it.

Validate

Any configuration can be validated by highlighting it from the main window and selecting **Configuration** and clicking **Perform**. This runs the configuration and displays the results.

Deploy a Configuration

A configuration is deployed for automatic processing on time or process events from the **Scheduler** using the *Manage Files by Configuration*.

The configuration can also be deployed from third party applications such as HMI screens, VBA macros, and the Windows command line. The syntax to execute the configurations is as follows:

Install\bin\xlrFile.exe /f Configuration

Where *Install* is the full path to the installation and *Configuration* is the name of the configuration file.

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