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A Guide To

# File Butler

By Denver Tax Software, Inc.

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# Overview

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## Why Use This Program

Computer documents are easy to create. Computer files that stay on the computer past a reasonable retention date cause numerous problems. Legal liability exposure, reduced computer performance, longer backup times, larger backup tape requirements and longer search times are just some of the problems that obsolete files can cause.

Unfortunately, those documents can be a real pain to remove. Rarely will an employee volunteer for such a grunt work project. When it is time to remove obsolete files, the files could be so old that no one knows what files should be deleted! This is normally tedious and time consuming work.

The File Butler will remove these obsolete files for you. If you plan your file naming methods, the File Butler will automatically delete or move out of date files. No eye strain. No unhappy employees. Reduced legal liability and increased computer performance. Let the File Butler do the work for you.

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## Getting The Most Out Of This Program

### Quick Start

Go to the section “Installing & Running” on page 3. We have tried to design the program so that you don't have to refer to this manual! When you are entering inputs, you can press the F1 key, in most cases, to get a comprehensive explanation of an input. If you have any questions, please go first to the Tutorial – Example section. See “Tutorial – Example” on page 14.

The help file is identical to this manual. The help file, accessed by clicking on the **Help** menu choice, has the same Table Of Contents (Contents) and index that this printed manual does. However, the help file has word search features which are not possible with the written manual.

When the program installs, it also installs a copy of this manual in Adobe's Acrobat (.pdf) format. If you want a hard copy of the manual, click on the manual icon in the Denver Tax Software Group (**Start - Programs - Denver Tax Software Group**). That will bring up the manual in the Acrobat Reader. The manual can be printed from the Acrobat program.

## **How To Get A Complete Understanding Of This Program**

Read this manual! See: “Terminology & Concepts” on page 4 and “Using The File Butler” on page 6.

This manual assumes that the user of the File Butler will be a system administrator or the equivalent. A user of this program should have a basic understanding of Windows Explorer and/or the Recycle Bin. If you don't know how to use Windows Explorer or the Recycle Bin, you might want to consider additional resources. See “Other Resources” on page 17.

# Installing & Running

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## System Requirements

Operating System: Microsoft® Windows® versions 95, 98, ME, NT 4, 2000 or XP. Please refer to the readme.txt file to see if there is important information about this program since the completion of this manual.

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## Installation

All commands you need to enter will be typed in **bold** type.

### Installing To A Single Machine

For the purpose of these instructions, we are assuming that your CD drive is drive D, if it is not, please make the appropriate changes. To install the program to a single machine, use the following steps:

1. Click on the **Start** button.
2. Click on the **Run** menu item.
3. Type **D:SETUP** and press the **ENTER** key.
4. Follow the instructions in the installation program.

### Network Installation

Network installation instructions are provided in a separate document to customers who have purchased rights to use this program on additional desktops.

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## Starting the DTS File Butler

The Installation program will create a "Denver Tax Software" Start Group, if it doesn't already exist. The DTS File Butler will be placed within this group.

To start the File Butler, click on the **Start** button, click on the **Programs** button, click on the **Denver Tax Software** program group, then click on the **File Butler** icon.

# Terminology & Concepts

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## The Basics

The File Butler searches parts of your computer hard drives looking for obsolete or “expired” files. When it finds an obsolete file, it will either **delete** it or **move** it to a quarantine folder.

If File Butler deletes the file, your system actually moves it to the Recycle Bin. The file is not actually removed from your system until the Recycle Bin removes the file or someone empties the Recycle Bin.

If File Butler moves the file, the file will be sent to a quarantine folder. The default quarantine folder is c:\fbquarantine. This gives you more control over the actual deletion of the file. To completely delete files in the quarantine folder (1) use Windows Explorer to delete the files in the quarantine folder and (2) empty the Recycle Bin. Note that you do not have to delete files from the quarantine folder as frequently as you run File Butler. If confidential information is in the obsolete files that may be removed, using a quarantine folder gives the administrator a little more control over the process.

---

## Include The Removal Date In The Filename

In the DOS days, a filename could not exceed eight characters plus a three character extension. Basically, you were limited to how descriptive you could be with DOS filenames. With the current Windows systems the combined path and filename can be as long as 255 characters. You can now make your filenames reasonably descriptive.

Include the file removal date in the filename. To indicate that the date in the filename is a removal date, precede the date with a removal date prefix, for example, “del-“. For filename, “*ltr to mom 02-15-2003 del-03-05-2003.doc*”, March 5, 2003 is the removal date. The “02-15-2003” date in the filename might be the date the document was sent, but it is not a removal date, since it does not have a “del-“ prefix.

Enter the year with four digits, not two. Thus, 2003 should be entered as 2003, not 03. Remember the Y2K problems? There could be a similar problem as early as 2030. One might say 2030 is a long way off. In 1970, people said that 2000 was a long ways off, and that attitude got us the Y2K problems.



---

## The Silent Mode

The program can, naturally, operate as a normal Windows program with the usual screen for data entry.

The program can also run in the Silent Mode. When running in the Silent Mode, you won't see any screens, messages or windows. In the Silent Mode you will not even know the program is running except for the typical file access sounds you hear from your hard drive. You can use the Windows Scheduler to have File Butler run once a day, once a week, once a month, etc. This way you don't have to take the time to start the program or wait for it to finish. To run it in the Silent Mode within the scheduler, use the command line structure:

```
filebutler.exe -s:<filename> where <filename> would be a File Butler configuration file.
```

An example of a the command line where you want the File Butler to use configuration file *default.fbp* would be:

```
filebutler.exe -s:default.fbp
```

See “Using The Windows 2000 and Windows XP Scheduler” on page 16 or “Using The Windows 98 Scheduler” on page 16 for a discussion on how to use the Windows Scheduler.

When the program is run in the Silent Mode, it will create a log file, *FileButler.log*. You can use Notepad to look at the log file to verify whether to program ran properly in the Silent Mode.

---

## Start Up Settings

When the program starts, it will look for the *default.fbp* configuration file in the same folder where the program, *FileButler.exe*, is located. The *default.fbp* file contains settings, such as what folders to search, what folders to exclude, the name of the quarantine folder (if any), etc.

You can use the input screen to change the start up settings. Make sure you save any changes to the start up settings by using **File – Save As...** - specify *default.fbp*. For more information, see “Inputs” on page 9.

---

## Warnings

If there is a potential problem related to a file, it will not be deleted. In the design of the File Butler we thought that if a file presents any problem, it is better to keep that file where it is. Better safe than sorry!

When the File Butler is run as a normal Windows program and a potential problem arises, a Warning Report can be viewed or printed. For more information on warnings and the Warning Report, see “Warning Report” on page 7.

# Using The File Butler

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## Main Window



### Exit Button

Click on the Exit Button to leave the program.

### Menu Choices

File View Help

#### **FILE**

**New.** This resets the program configuration to the way it was when the program was first installed.

**Open.** This brings up a screen where you can choose a previously saved file. Once the file has been selected, the input screen will appear with that file's information.

**Save.** This saves the current scenario to the file that was previously **Opened** or to the file previously that was chosen with **Save As...**

**Save As...** This is where you can choose a filename for the File Butler configuration that you are currently working with.

**View.** This is how you select what reports to view on the screen. This gives you the same results as menu choice **View – View**.

**Print.** This is where you select the reports to print out. This gives you the same results as **View – Print**.

**Exit.** Exit the program.

## View

**View.** This is how you select what reports to view on the screen. This gives you the same results as **File – View**.

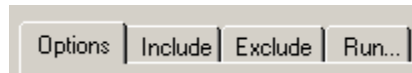
**Print.** This is where you select the reports to print out. This gives you the same results as **File – Print**.

## Help

**Contents.** This will bring up the program's help.

**About.** This brings up the program's About screen.

## Tabs



The tab strip is how you choose the inputs that you want to work with.

---

# Reports

## Report Choices

The program's reports can be viewed or printed after File Butler has been run. (See "Run... Tab" on page 13). These reports can be run from either the File or View menu choices. The program's reports are as follows:

- Settings Report
- File Removal Report
- Warning Report

## Settings Report

This report shows what the program's settings and inputs are. This report includes a list of folders to be searched and folders to be excluded.

## File Removal Report

This is a listing of files that either have been moved to the quarantine folder or have been deleted.

## Warning Report

This lists any warnings that came up in the previous run. Likely warnings are as follows:

### ***Deletion date is before file creation date***

It doesn't make sense to say a file should be deleted before its creation date. This situation is probably a result of an incorrect deletion or removal date.

**Action:** Review the file that caused this warning to see what the appropriate removal date should be.

### ***File access is denied***

An Access Denied error could be related to the program not having the right permissions to access a file.

**Action:** Maybe this file is not supposed to be accessed or deleted! Look into the nature of the file, and have an administrator change the permissions for this file only if such changes would be appropriate.

### ***File system error***

The file system is giving the File Butler an error with respect to this file. This message would probably indicate an error number.

**Action:** Contact DTS technical support at either [info@denvertax.com](mailto:info@denvertax.com) or 1-800-326-6686. Please indicate the error number so we can research the situation.

# Inputs

---

## Entering Information

### Data Entry

The File Butler uses the normal input procedures that most Windows programs use. To move from one input to another you can either use the mouse to select the input item you want, or press the **TAB** key to move through the inputs. To exit an input screen you can use the mouse to click on the appropriate button.

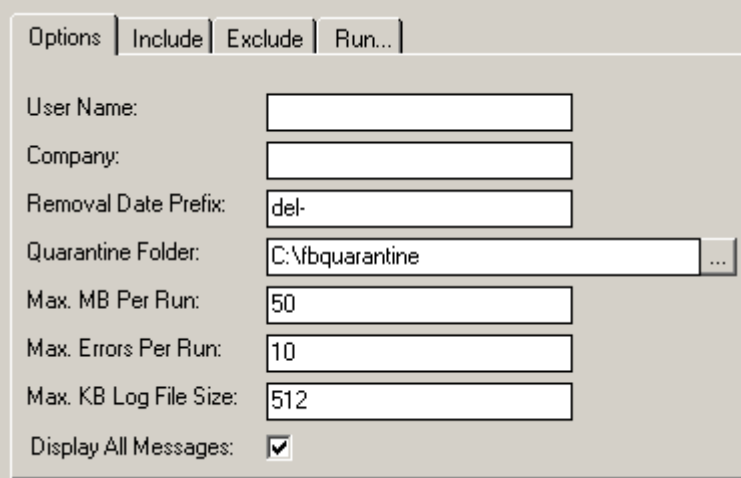
You may find it easier to enter numeric information using the numeric keypad. If so, make sure the **Num Lock** key is on.

### How To Move Around The Input Screens

The input screen is broken down into tabbed dividers similar to a tabbed notebook. To move to a different tab simply click on the tab you want to move to. The input screen's tabs are *Options*, *Include*, *Exclude* or *Run*.

---

## Options Tab



The screenshot shows a dialog box with four tabs: "Options", "Include", "Exclude", and "Run...". The "Options" tab is selected. The dialog contains the following fields and controls:

- User Name:
- Company:
- Removal Date Prefix:
- Quarantine Folder:  ...
- Max. MB Per Run:
- Max. Errors Per Run:
- Max. KB Log File Size:
- Display All Messages:

## User Name

Enter the user's name.

## Company

Enter the company.

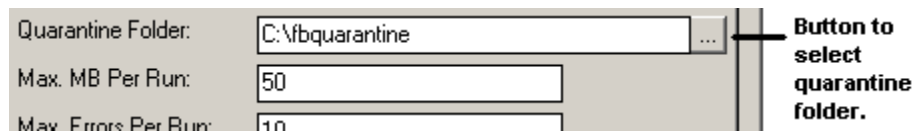
## Removal Date Prefix

Enter the prefix to the removal date. We recommend using “del-“ for the Removal Date Prefix. It is brief, descriptive and easy to type. Thus, if you wanted to remove a file after December 15, 2002, we recommend using a file name that contains “*del-12-15-2002*”. An example of such a file might be “*ltr to mom del-12-15-2002.doc*”. Before using File Butler for the very first time, make sure that “del-“ (or another prefix) is not being used for files that should not be deleted, using the procedure as follows:

1. **Click** on the Windows **Start** button.
2. **Click** on **Search**.
3. **Click** on **For Files or Folders...**
4. For “**Search for files or folders named:**” enter **\*del-\***.
5. **Click** on the **Search Now** button.

If the above procedure lists files that should not be deleted. Try a different prefix.

## Quarantine Folder



Quarantine Folder:	C:\fbquarantine	...
Max. MB Per Run:	50	
Max. Errors Per Run:	10	

Either type in the quarantine folder name or click on the button to select a quarantine folder. This is the folder where the program will move obsolete files to. You can later use Windows Explorer to delete the files in the quarantine folder. After deleting the files, it is recommended that you empty your recycle bin.

If you leave this blank, the program will simply delete obsolete files. Even though it is faster to let the program automatically delete files rather than move files to the quarantine folder, you run several risks:

1. Using a quarantine folder, lets you have a look at files before they are deleted.
2. Deleting files to the Recycle Bin may in some systems present a security risk. Confidential information in the Recycle Bin may become more visible to a hacker.

## Max. MB Per Run

Enter the maximum megabytes of data that you would allow the program to either move or delete per run.

There may be some dates that could have huge volumes of data to delete on a given day. For example, October 15, 2005 could be the statute of limitations for many tax

documents. An October 16, 2005 File Butler run could produce such a huge number of files that the operating system could get swamped. By limiting the volume of files that could be deleted in one day, you are protecting the operating system. If File Butler reaches its maximum file volume in one run, the files that the File Butler didn't get to will be scanned in a future File Butler run.

## Max. Errors Per Run

The File Butler could have errors due to obsolete files that have been marked as read-only, etc. Enter the number of errors or warnings that the File Butler should "tolerate" before aborting.

## Max. KB Log File Size

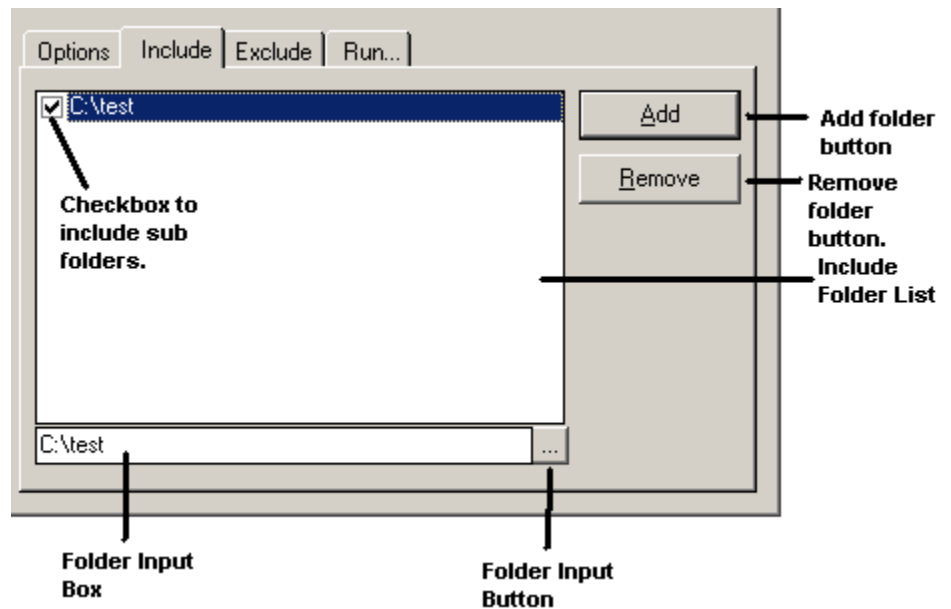
Enter the maximum kilobytes that any File Butler log files can reach. If the program reaches the maximum, it will stop logging the list of searched folders.

## Display All Messages

If this is checked, all messages, warnings and progress indicators will be displayed to the screen. Even though this lets the user know what the program is doing, the system pays a performance penalty for this. On the other hand, it is better to see that something is happening rather than shutting off the system because it appears that nothing is happening.

---

## Include Tab



## The Include Folder List

These are the folders, including subdirectories, that the File Butler will search through. Note that the checkbox to the left of the folder name indicates whether you want to include subfolders as well.

If the Include Folder List is left blank, the program will search through all folders on your C: drive.

## Folder Input Box and Button

### *Local Machine*

Either type in the folder name or use the button to graphically select the folder.

### *Network*

In network situations you might have to type the folder designation into the Folder Input Box, rather than use the Folder Input Button. To include a drive on another machine use the `\\<computer name>\<drive letter>$` format. Thus, to include the C: drive on the CEO computer, type in: `\\ceo\c$` (remember that this will only work if the File Butler is given the proper permissions).

## Add Button

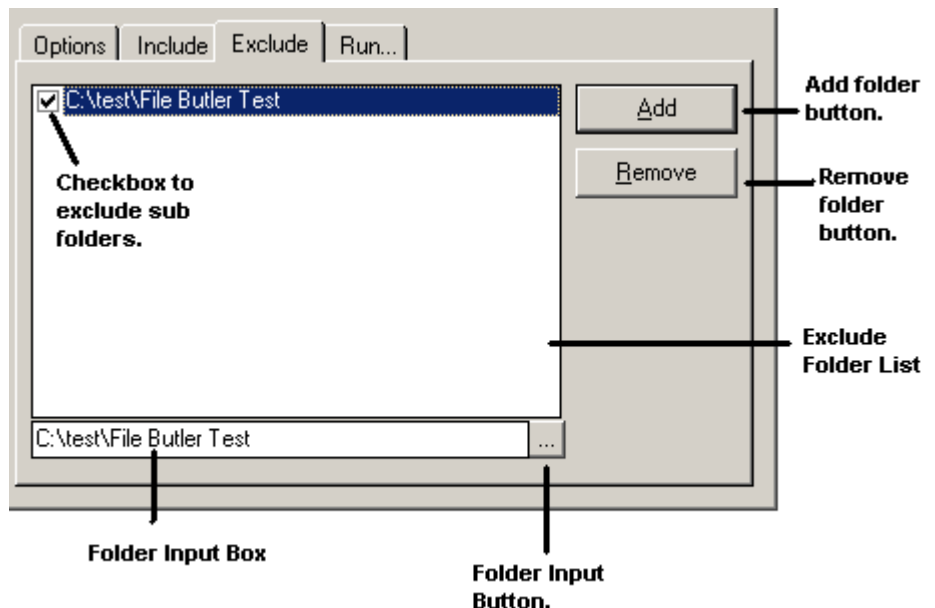
This moves the folder in the Folder Input Box to the Include Folder List.

## Remove Button

This removes any folders that have been selected in the Include Folder List.

---

## Exclude Tab





## The Exclude Folder List

These are the folders, including subdirectories, that the File Butler will **not** search through. Folders in the Include Folder List will be searched until the program reaches a sub folder that is in the Exclude Folder List.

## Folder Input Box and Button

Either type in the folder or use the button to graphically select the folder.

## Add Button

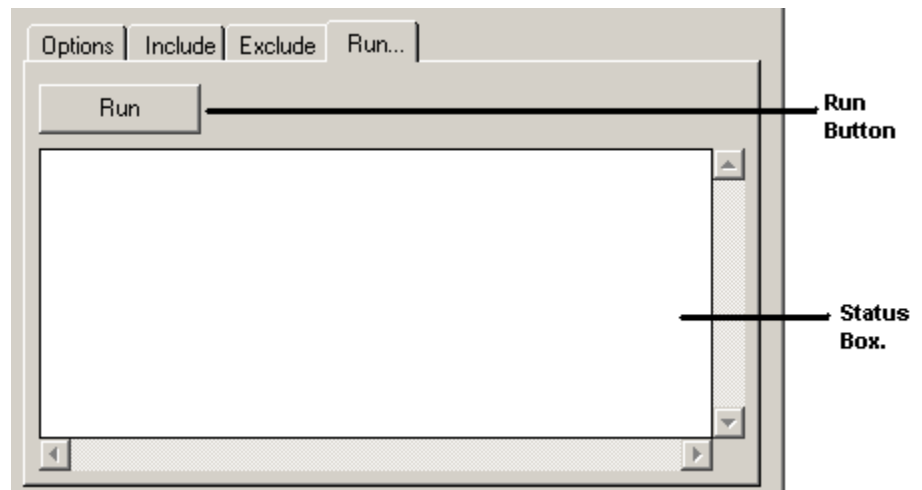
This moves the folder in the Folder Input Box to the Exclude Folder List.

## Remove Button

This removes any folders that have been selected in the Exclude Folder List.

---

## Run... Tab



## Run Button

Click on the Run Button to run the File Butler.

## Status Box

The status box will list files that have been removed and any warnings.

# Tutorial – Example

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## Assumptions

This example assumes that the program was installed in folder “*c:\program files\Denver Tax Software\File Butler.*” If you installed the program in a different folder, please make adjustments accordingly.

---

## Tutorial

Start the program. **Click** on the **Start** button, **click** on the **Programs** button, **click** on the **Denver Tax Software** program group, then click on the **File Butler** icon.

The first screen is the *About File Butler* window. **Click** on the **OK** button.

**Click** on menu choices **File – Save As...**

For the File name enter **test**.

**Click** the **Save** button on the Save As screen.


Type in **John Doe** for the User Name and press the **TAB** key.

For the Company type **ABC Corp** and press the **TAB** key.

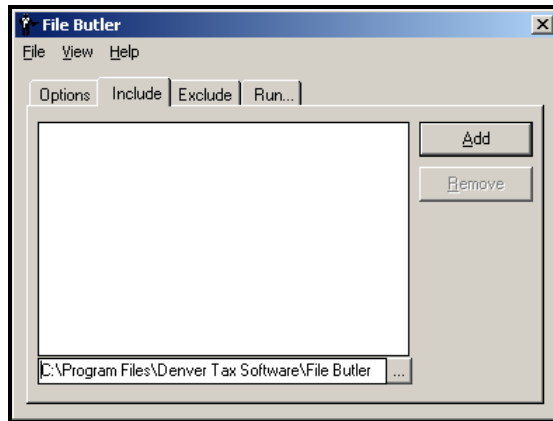
At the **Removal Date Prefix** and **Quarantine Folder** inputs press the **TAB** key. (Note that the default location for the Quarantine Folder is *c:\fbquarantine*. If you don't want this on the C: drive change the c: accordingly.)

**Click** on the **Include Tab**.

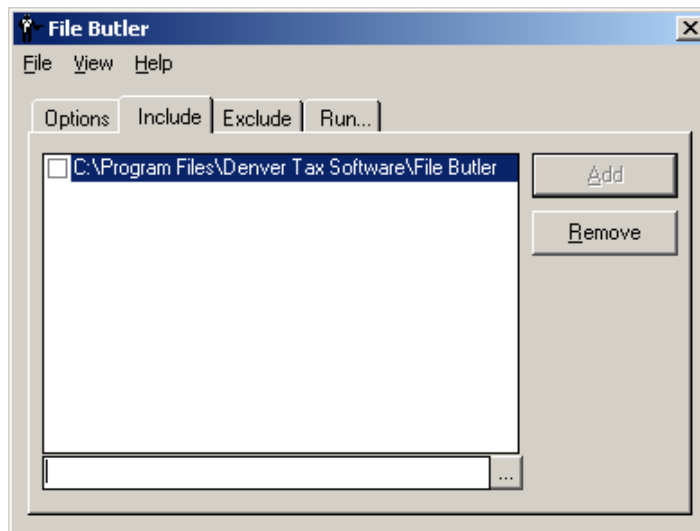


**Click** on the button  that has three dots. Navigate to *c:\program files\Denver Tax Software\File Butler* by pressing the plus signs starting, with My Computer, until you have reached *c:\program files\Denver Tax Software\File Butler*.

**Click** on the Browse For Folder screen's **OK** button. Your screen should look like this now:



Click on the **Add** button. Your screen should now look like this:



Click on the **check box** to the left of *c:\program files\Denver Tax Software\File Butler*.

Click on menu choices **File – Save** to save this setting.

Click on the **Run** tab.

Click the **Run** button.

Since the program installs a few small test files to *c:\program files\Denver Tax Software\File Butler*, the program should indicate that one or more files have been moved.

If you want to run this test again, use Windows Explorer to copy the test file back from *c:\fbquarantine* to *c:\program files\Denver Tax Software\File Butler*. Naturally, you can also create test files on your own.

# Appendix

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## Using The Windows 2000 and Windows XP Scheduler

Logon as an administrator. If you are not an administrator, talk to the system administrator about this.

**Open the Control Panel (Start – Settings – Control Panel).**

**Double click on Scheduled Tasks.**

**Double click on Add Scheduled Task.**

Follow the prompts on the Scheduled Task Wizard until you get to a list of applications. **Click** on the **Browse** button.

Navigate the Windows Explorer window until you reach the folder where the File Butler is located. This is probably *c:\program files\Denver Tax Software\File Butler*.

**Double click on FileButler.exe.**

Choose the frequency that you want to run this program.

Choose the time of day when you want to run the program.

Enter the administrative user name and passwords.

Indicate that you want to enter Advanced properties. Change the Run property from:

"C:\Program Files\Denver Tax Software\File Butler\FileButler.exe" to

"C:\Program Files\Denver Tax Software\File Butler\FileButler.exe" -s:default.fbp

**WARNING:**

If you don't put the quote marks in the right place, the scheduled task won't run!

Enter passwords again if so prompted.

**Click on OK.**

---

## Using The Windows 98 Scheduler

**Click on Start – Programs Accessories – System – Scheduled Tasks.**

Follow the prompts on the Scheduled Task Wizard until you get to a list of applications. **Click** on the **Browse** button.

Navigate the Windows Explorer window until you reach the folder where the File Butler is located. This is probably *c:\program files\Denver Tax Software\File Butler*.

**Double click on FileButler.exe.**

Choose the frequency that you want to run this program.

Choose the time of day when you want to run the program.

Indicate that you want to enter Advanced properties. Change the Run property from:

"C:\Program Files\Denver Tax Software\File Butler\FileButler.exe" to

"C:\Program Files\Denver Tax Software\File Butler\FileButler.exe" -s:default.fbp

**WARNING:**

If you don't put the quote marks in the right place, the scheduled task won't run!

Click on **OK**.

---

## Other Resources

It is helpful to have an understanding of Windows Explorer and the Recycle Bin when using the File Butler. If you are not comfortable with Windows Explorer or the Recycle Bin, you might want to consider easy to read books on the subject as follows:

Windows XP for Dummies by Andy Rathbone.

Windows 2000 Professional For Dummies by Andy Rathbone and Sharon Crawford.

Windows 98 for Dummies by Andy Rathbone.

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