



Training: halFILE Administrator

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This session is designed to provide training on the halFILE Administrator module. You will learn how to create new halFILE applications, databases, and baskets; how to set up baskets, define tables, create drives/cartridges and administer security. Setting up halFILE features and options will also be reviewed.

Creating new databases

1. Should the database be “under” an existing application or a separate application?

Applications are used to organize your databases. For example if you have two lines of business, the Law office and Title Company, it may make sense to create a new application. Or, for example, if this is for the same company, just a different type of document (Account Payable documents for the Title Company) then it may make sense to place the new database under your existing Application.

File-Applications menu is used to set up new applications.

2. What fields do I want to post to this database so I can search for the documents later on?

File-Databases menu / **Add New** button is used to set up a new database.

3. Is there a way to use an existing database as a starting point?

Yes. We save “spec” files for each database that has been created in halFILE. These can be loaded in the Database Designer screen using the File-Open Specification menu. The spec files have a .spc extension and usually reside in the database folder under the halFILE program folder. If you do not have a .spc file for the database you wish to copy, you can create the spec file under the **File-Databases** menu / **Review Layout** button

4. Should a field be table-driven?

During database set up, you can define a field as table drive. This helps validate the data for correctness.

During the field definition, the Table Name box is used to define a field as table-driven. You can select <new> to set up a new table.

File-Tables menu can be used to populate the table.

5. How do I need to organize the capture and posting process?

Baskets are used to assign the workflow of capturing documents and posting the index information.

File-Baskets menu or **File-Databases** menu / **Baskets** button is used to set up new baskets.

6. Does the new database work?

After setting up the database, scan or import a sampling of documents. Post the index information. Then have the users search for the documents to be sure the database information posted meets your needs.

7. What if I need to make changes to the database?

If the database that you set up does not meet your requirements, you need an additional field or you need to reorder the fields, one of the following actions is required:

- a. Remove the database and start over as follows (BE CAREFUL!!!).
 - Clear out the baskets and remove them using File-Remove menu inside of the File-Baskets menu.
 - Remove the database from halFILE using the File – Databases / Remove button. Note this does not destroy the database, it just takes it out of halFILE.
 - Go into SQL Server Enterprise Manager or Management Console and remove the xxxHFWdd and xxxBSKdd databases (xxx is the application id, dd is the database id).
 - Go back in and redefine your database. Use the .spc file as the starting point.

- b. Adjust the database manually to make the changes.
 - Some changes such as increasing the size of a field or adding a single-entry field at the end of the Primetable table can be done easily using SQL Server Enterprise Manager or Management Console.
 - Reordering fields, removing fields, adding multi-entry fields or adding table-driven fields require more complex changes and you may need Technical Support Assistance.

Other File-Databases buttons

Add ODBC – used to add a pre-existing halFILE database.

ODBC Info – used to change the settings for an existing database.

Field Links – used to link searches for two or more multi-entry fields to ensure that matches occur only when the criteria matches on the same database row.

Lookups – defines data extraction at index time from external databases.

References – defines field references that link two documents together if certain data matches. Used when the View Reference box is checked during search.

Masks/Auto Fill

Field Masks tab defines field masking for the Search and Index screens. Most often used for dates.

Field Auto Fill (system wide) tab defines fields that are automatically filled in at index time for all stations.

Field Auto Fill (this station only) tab defines fields that are automatically filled in at index time for this station. You can get to this menu “on the fly” from the Index module.

Field Auto Fill (Re-Import) tab defines fields that are automatically filled when a document is re-imports in the Search module.

Verify Setup – sets up the Index Verification Feature where posting is performed twice and the system identifies the differences.

Proximity Search (3.0) – defines Proximity Search fields for search.

Configuring Security

The halFILE Security system is a powerful way restrict user functionality and database access.

1. Defining Users.

The **Configure-Security-User Profiles** menu is used to set up administer halFILE users.

For new users, first select what default privileges they should have. These are defaults only that are used as the user is given access to databases.

2. Define **Extended Settings** for a user.

Once the database is added for the user, double click it in the right-hand panel to configure addition User Features using the Extended Setting button as needed. The most important settings on the Extended Settings screen are:

1. Search: File – Delete Document
2. Security: Allow Index
3. Security: Allow Update

3. User Groups (Document Level Security).

Document Level security restricts the access to particular documents within a database.

Configure-Security-User Groups menu is used to set these restrictions up.
(Configure-Security-Document Level in 3.0)

4. Configuring how a users Search Screen looks.

The **File-Databases menu / Custom Search** button is used to define Custom Search.

5. Basket Security.

The **File-Baskets** menu lets assign users to baskets. Baskets can be set up to allow no image documents only.

Other Configure Menu Selections

Configure-Station ID – defines the prefix letter to use for images imported or scanned at the station.

Configure-Drives – defines Drives which hold images.

Configure-Cartridges – defines Cartridges that are used to archive images.

Moving images to a new drive

1. Copy the images to the new drive. (Robocopy or Xcopy may work better than Windows Explorer copy)
2. Define the new drive in Configure-Drives.
3. Remove the old drive from Configure-Drives.
4. Go into Configure-Cartridges and use the Current Location button to make sure halFILE finds the new drive.
5. Perform searches to make sure images are being seen.
6. You may consider using the halFILE Validator to look for missing images.
7. Use Windows Explorer Properties to get count and size of images on old and new drive.
8. Update the drives in all Auto Archive Sets.
9. Modify any backup procedures that were in effect for old drive.
10. Keep the old drive around if it is being retired.

Setting up halFILE features

The **Tools-Options** menu is used to set up many halFILE Administrative options and features.

General tab

General options are maintained on this tab.

System Messaging tab

Sends messages to users of halFILE.

Administrative Reports tab

This tab is used to set up special reports for use by the Administrator. When you

Transactions tab

This tab manages the transaction logging feature of halFILE.

Security/Versions tab

This tab is used to select security options for halFILE.

FTP Setup tab

This seldom-used tab is used to define settings for the HALFTP program.

HFDeliver tab

This tab configures the halFILE Delivery system for program updates that are applied locally to workstations.

Menus tab

User-defined menus are set up on this tab.

Tools-Licensing menu - checking user activity

Tools-Auto Archive Set up menu – setting up Auto Archive

Tools-Update Service menu – obtaining program updates and releases

The halFILE Update Service is used to check for new releases of halFILE programs. If you are on version 2.2 then the update service presents you with version 2.2 updates. If you are version 3.0, then 3.0 updates are shown.

1. Select Tools-Update Service menu.
2. Tells you it is going to close the halFILE Manager.
3. Click Start to list the updates.
4. If any of the updates is older than the module you currently have, you will be asked what to do. Typically, you would want to answer NO to keep the newer version.
5. Available updates are listed in YELLOW. GREEN indicates you have the latest version. A RED Flash is placed in column 1 if a description of the update is available.
6. Double click a row to switch it to BLUE for update. All blue items will be downloaded and installed. You can also click the Select All button to set all YELLOW items to BLUE.
7. Click Get Updates to download and install the selected modules. You will be warned to get everyone out of halFILE if it notices that any users are active.
8. Once the update is complete the Update Service may tell you to get users to log back in so new updates may be installed. This occurs when components such as DLL and OCX files must be delivered to the local machine via our delivery service.
9. In some cases (Terminal Server / Citrix Server), the deliver service may be turned off to prevent users from attempting these installs without rights. In this case, you must:
 - a. Login to the Terminal or Citrix Server as an Administrator.
 - b. Go to the Deliver tab of the Tools-Options screen of the halFILE Administrator.

- c. Click the Apply Updates to this Workstation button.

Tools-Database Validator – check for missing images and bad codes

Help menu

About halFILE Administrator – shows the version of the Administrator and the number of licensed users. The Program Information button shows the path to the halFILE home directory.

Help-Contents – contents of on-line Administrator help file

Help-Index – index of in-line Administrator help file

Help-Search For Help On – search the on-line Administrator help file

Help-Complete Manual – opens the entire halFILE on-line manual

Help-Go to the Web (halfile.com) – goes to www.halfile.com