



halFILE Search Module HUG 2007 Conference November 15, 2007

This session will introduce attendees to the enhancements contained in halFILE Version 3.0 Search Module as well as touch on some existing search shortcuts and under-utilized features of halFILE's Search Module.

This document should be used as a descriptive template to guide you through the numerous configurable options available in our Search module. In most instances you must be a halFILE administrator user in order to access these configuration screens.

Proximity Search can be configured for database fields through Administrator / File / Databases. Select the database which contains fields for proximity search and click the Proximity Search button. Add the field(s) to be searched from 'Fields Available' column to the 'Proximity Search Fields' column. Click the buttons to Define the Full-Text Catalog and then Populate Full-Text Catalog. *Note that the population of the full-text index can take quite some time based on the number of records in the selected database. This feature requires SQL Server 2000 or later full-text indexes.*

The following features can be configured through Search / Tools / Options:

HIT LIST TAB

- Hit List Descriptions – Mark button to turn on or off the display of table descriptions rather than codes in the search hit list. This is a global setting for all halFILE users.
- Display Results – Mark button to show one row (first row) per document, rows that match search criteria entered (for example if the name searched was line 3 of index then that line would display on hit list), or all rows of index on the search hit list. This is a machine-specific setting. *Note that the all rows option takes longer to load and display during search and may result in an out of memory condition on the PC based on the number of rows being returned.*
- Hit List Button Execute Pending Order – Pending Order sub-system allows for order tracking and note of “fallout” transactions indexed for a particular order.
- Hit List Button Execute Word Merge - Works in tandem with the Word Merge setup template described below to use halFILE index data to populate variables in Word documents.
- View References – Marking this box toggles the 'View References' checkbox on the search criteria screen to an “ON” status. Use the color template boxes for

foreground and background coloration of reference documents on the hit list. Reference items are also noted with “R” at left column of search hit list.

- Hit List Colors – Defined as individual sets. Select the first undefined set number from the drop-down panel, then select the appropriate database field to match. Type in the value of the field that will trigger the color-coding, like “WD” as the code for Warranty Deed if we were using Instrument_Type field as our database field. Then use the color template boxes for foreground and background coloration of documents that match that type. Be sure to click Save Color Set button to save your settings. *You must exit the search module and re-enter in order to reflect your color changes. Note that these values are stored in the file HFGLOBAL.INI – if a set needs to be deleted contact hal Technical Support for assistance.*

CROSS NAME SEARCH TAB

- Check the box to enable the ‘Cross Names’ checkbox in the Search Criteria window. Then use the drop-down panels to select the two fields that will be associated through cross-name search. Finally type a field description that will display when the cross-name checkbox is requested during search.

ORDER BY TAB

- Up to five (5) hit list sort clauses can be defined using this panel. Position cursor in one of the ‘Order By Field Clause’ boxes. Use the drop-down panel to select the database field that is to be used for sort. Then click the ‘Insert Field’ button to add the database field to the clause box. Always insert the halFILE field PRSERV (hal’s document number) as the last field in your order by field clause box. Fields are separated by commas. Multiple fields can be contained in the order by clause for example:
Primetable.Book, primetable.Page, primetable.PRSERV would order by book then page. Specifying the word ‘desc’ after a field will default the sort from highest to lowest rather than lowest to highest. For example:
Primetable.Document_Date desc, primetable.PRSERV would sort hit list from newest date to oldest date. Finally type the ‘Order By Caption’ of the sort that will appear in the ‘Order By’ box in the Search Criteria panel.

PUBLISH TAB

- Publish enables halFILE to make copies of documents as either multi-page TIF files or PDF files and place them in a user-designated folder along with an HTML file index of those documents. Use the buttons for ‘HTML template’ or ‘PDF template’ to auto-populate the default HTML scripts used to build the HTML index

file. Then specify a folder in which halFILE will drop the published documents and the HTML file index for either email, burn to CD/DVD, etc. Check the box to either create files in HTML format (TIF) or PDF format (Adobe). *Note that Adobe format requires a 3rd party program TIFF2PDF.EXE which can be downloaded from hal Systems [files will contain TIFF2PDF.EXE watermark unless program is purchased from vendor].*

IMAGE MODIFICATIONS TAB

- This checkbox configures automatic update of a database field (Update_Date or similar) if the indexed image is appended to, or annotated, or otherwise modified. Used as an audit trail for image file modifications.

EXECUTE TRIGGERS TAB

- Search lost focus (“focus” is active on the field where the cursor is located and is “lost” when the tab button moves the cursor out of that field) checkbox will enable halFILE to match certain values entered into a database field in a search to trigger a secondary search or execute of a custom program to return values back to halFILE. The ‘Field to be Tested’ drop-down box identifies the database field to be examined for the values keyed. It also allows for the trigger to be bypassed if another database field contains any data. The ‘Program to run on lost focus’ tells the system what program to execute to return the secondary results. The ‘Search Execute’ option line to execute is used to tell halFILE to auto-run another program whenever a record is updated and saved during a search.

HFFlow32 template button will fill in the program that populates a second database with like updated values based on a common match field.

Pending Order template button will fill in the program that performs a search for matching “fallout” instruments and prompts for email notification of the fallout to specified parties.

DOC INFO MAIL TAB

- Configuration options for the addressing and email text for documents emailed from the halFILE system. Default recipient email address, second recipient email address for this PC can be loaded as well as a subject line, email body introduction text, and email body lines for each document sent which can include “wildcards” as specified in the help on the panel - %user% for halFILE user id, %databasename% for database name, %prserv% for hal’s document number, etc.

SCAN ON DEMAND EMAIL TAB

- Checking the box 'Mark hit list documents with no images' will enable halFILE to identify any index record that has a blank storage location and basket with the letter 'X' in the left column of the hit list. Legitimate NoImage basket names are listed in the no basket field separated by semi-colons so these items are not tagged as missing image indexes. Email addresses can be provided so a note can be generated to pull and scan the missing image pages. The email subject, body introduction, and body can be pre-configured in the same manner as the section about for Doc Info Mail.

NOTIFICATIONS TAB

- Changes to a specific field in index or in update during search can trigger email generation to notify parties of the change in the index information (for example a Status field in the database). Use the drop-down to select the database field to be monitored for the change, then specify the field value that should trigger the email generation. The notify execute field is used to tell halFILE what program to run to produce the notification – HFNOTIFY32.EXE is our default template. The subject and the body of the email can be pre-configured. Checkboxes are provided to note whether the email should be generated during the original indexing of the document and/or the update of an existing document.

WORD MERGE TAB

- The Word Merge option in halFILE sets up creation of a scratch MDB file that can then be fed into a Word merged document template for generation of letters, notices, etc. using database information from the halFILE hit list. Use the drop-down to select a unique database field (PRSERV is fine). Use the drop-down to select the format for date fields. Check the 'Post Table Descriptions' box if you want to include the description of a table value rather than the code. Check the 'Combine Multi Information as One Record' box if you want the multi-entry field indices concatenated on a single line. Use the select button to locate the path and file to launch for Word Merge. *Note for Word program you would locate the file WINWORD.EXE.* Use the select button to locate the path for the Word Merge scratch template. *Note this would normally be your TEMP directory on your local PC.* Word Merge Document Templates allows user to set up a new template or modify an existing one. Select 'add new' to build a new template. Specify a

name that you use to reference the document template then select the appropriate Word document used for the merge routine (.DOC file).

STARTER TAB

- halFILE's starter system sets up menus that enable the user to build a GF or order record automatically in halFILE and then perform nested searches based on all the search criteria keyed into the starter. The search criteria screen is used as the template to key the starter information to be used for the search. It is this starter information that is automatically indexed to the file number specified as a permanent record for the order. This record can then be subsequently retrieved to do date-down searches or when working a new order with the same or similar criteria.
- Check the box to enable the starter feature which will create a Starter menu option on the search criteria screen.
If you are keeping the plant date as the last characters in your database name (through admin/file/databases/ODBC info) as a reference the starter system can strip this date and use as the ending date on your starter record search if the box is checked.
Use the drop-down menus to select the database fields where the starter or file number will be indexed (normally Clerk_File_Number).
Select the field for the starter description like property address or buyer/seller – this field should be multi-entry or memo (i.e. Brief_Legal or Remarks).
Select the open date and close date fields (this can be the same database field – the order open date and order close date are automatically posted here i.e. Inst_Date).
Select the starter status field (normally Inst_Type). You will want to add two new instrument type codes for Open Order and Closed Order. These codes are keyed in the Open Status Value and Closed Status Value boxes.
Select the Fallout Date field (File_Date).
Select the Security Group field if applicable which will prevent your starters from being viewed by other users.
The document prefix letter will be used as the first character of the halFILE document number for the starter record – any capital alpha character can be specified here.
Starter basket – use any “No Image” basket name in this field.
- Criteria Set – drop down and select the first available set number. Criteria sets in a plant would be Grantor, Grantee, Sub_Block_Lot, Sec_Twn_Range, Abstract, Acres. Each database field is a separate set.
The ‘Set Description’ will appear on the search hit list above the rows found for that set.

Drop down and pick the appropriate database field to search for that set. The 'Order Hit List By' is the string for sorting results of the search – primetable.File_Date, primetable.PRSERV will sort list by filing date. Default search type drop-down contains options for how the field is searched – normally Grantor and Grantee will be either BEGIN (Beginning of Field), CONTAINS (Free-Form), or SOUNDEX. Sub_Block_Lot must be type TITLESUBDIVISION, Sec_Twn_Range must be type TITLETOWNSHIP, Abstract should be EXACT (Exact Match) as would be Acres field.

- After configuring the Starter tab on the Search Criteria panel a Starter menu option is displayed. Specify ALL search criteria for the order then click Starter/Create to be prompted for the file number and presented with the panel that will recap all search criteria specified, allow for the input of a description of the order and a beginning and ending date for the search. Save Starter box will only index the file record into the database; Save Starter and Run Search will build the file record and launch the search; Search Only will bypass the creation of the starter record. Checking the box to save the ending date for date-down search will store the last ending date of the search to load as the beginning date on any subsequent search. Starter records are edited using halFILE search and update as with any other database record or by selecting Starter/Edit in the search criteria panel.

FALLOUT REPORT TAB

- If the starter system described above is enabled then a report of the fallout documents posted after a file record is entered can be configured in this tab.] Type a reference name for the fallout report. Use the select button to locate the path to the REPORTS folder in your halFILE program directory on the network. Use the select button to locate the Crystal report for fallout documents. *Note hal Systems can provide a report template file HFFALLOUT32.RPT that can be customized for your database.* Last Fallout Report Date field is a reference posted by the system. Check the box 'Fallout Report will be Run as a Scheduled Task' if you want to configure auto-run of the report.