



**halFILE Index Module**  
**HUG 2007 Conference**  
 November 16, 2007

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

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

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

**INDEX EXECUTE TAB**

- Allows configuration of a program to be executed when CTRL-S is keyed to save a record in index. These programs include the Pending Order program (template button provided on screen) which prompts a search through the database for order records that match the index criteria of the document. Another example is auto-population of index data from the current record to other associated records in this database or another "mirror" database.

**INDEX LOAD EXECUTE TAB**

- Allows configuration of program to run when the index module or Index Verify module is initially selected. Template buttons are provided for:  
 BARFILE32 which when triggered reads through all images in the basket selected for indexing and populates index fields based on the information contained in the barcode.  
 FTPFILE32 which when triggered reads through all images in a configured folder and collects them for indexing in the selected basket.

**INDEX MENU EXECUTE TAB**

- Special programs can be added to the index criteria menus using this tab to enable user to run an external program while in halFILE Index module.

## NOTIFICATIONS TAB

- Changes to a specific field in index can trigger email generation to notify parties of 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.

## GENERAL TAB

- 'If autofill is enabled overwrite existing information if it exists' checkbox tells halFILE that during index if a record is presented that has been previously indexed by autofill or by a read of a barcode this information should be overwritten by the current autofill parameters.
- 'Duplicate Information if record already exists' enables halFILE to overwrite an already populated index by duplicating information from the prior record.
- 'Duplicate all fields' is the default set when edit/duplicates is selected from the Index Criteria menu. This box can be unchecked and then only selected fields will be subject to auto-duplication from record to record during index.

## FIELD DEACTIVATION TAB

- Use this panel to configure “grey out” of certain fields during index based on a value keyed to a single index field as follows:  
 Check the box to enable field deactivation  
 Use the drop-down to select the trigger database field which will initiate the grey-out of selected fields based on a value or values defined in sets below.  
 Drop down and select the first available set number for definition.  
 Specify the value that will trigger the deactivation.  
 Add the database fields that should be greyed out if this value is keyed.  
*Note: Only one trigger field is allowed although multiple sets can be defined around different values in the trigger field i.e. the trigger field is 'Category' and Set1 matches on value 'A' and deactivates certain fields; Set2 matches on value 'B' and deactivates other fields.*

## **DUPLICATION HOT KEYS TAB**

- Click the Add New button to configure a field hot key combination for this database.  
Use the drop-down to select the database field for duplication.  
Key the hot key combination to auto-fill those keys into the key combination to use.





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

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This document should be used as a descriptive template to guide you through the numerous configurable options available in our Scanning module. Options vary based on whether you are using Kofax or TWAIN scanning. In most instances you must be a halFILE administrator user in order to access these configuration screens.

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

**GENERAL TAB**

- Drop-down box displays the current program used for scanning on this station. Kofax requires Adrenaline software and/or hardware. TWAIN uses imaging components incorporated into pre-XP operating systems. TWAIN with Imaging Pro uses imaging components provided in the 3<sup>rd</sup> party product Imaging Professional for Windows.
- Scan execute prompt is text which will appear on-screen at completion of indexing.
- Scan execute program gives path and filename of program to execute when scan module is exited (i.e. BARFILE32 to recognize barcodes, etc.).
- TempFolder path is used for TWAIN scanning to UNC path baskets with a button provided to fill in the machine's %temp% directory.
- Check box to allow save as feature in image window to allow halFILE scan to generate multi-page TIF image files, essentially using halFILE scan as a method for generating a file for email attachment or save to disk without stapling to be indexed in a halFILE database.

**STAPLING TAB**

- Staple preview box is a new 3.0 feature enabling the scan program to toggle-mark the end of document. Clicking DONE after marking end of documents with F5 actually concatenates the pages and closes the scan/staple window.
- 'Delete Cover Sheets/Patch Codes' radio button defaults to keep all pages in document. If the 'first page delete' or 'last page delete' buttons are marked then the appropriate page is deleted from the document during stapling (to remove barcode or separator pages from the permanent archived document).
- 'Disable the message displayed when clicking the DONE button...' if this box is UNCHECKED then when the last group of pages is stapled a message appears to the user asking for confirmation that all the remaining pages in the window are to be grouped as a single document. Checking this box suppresses this notification.
- 'As pages are stapled print document to default printer' will initiate print of each document as the F5 key is pressed or stapling is performed.

### SCAN FTP TAB

- Check the box to allow configuration of halFILE scan module to use FTP (File Transfer Protocol) to send the image (and associated text file if configured) to a remote site after scanning. *Note that all parameters are configured here then a desktop shortcut is setup to run the FTP scan process – for example in Kofax scanning the desktop shortcut target would be "#path to halfile# /HFSCAN32.EXE FTP".*
- Check the appropriate configuration boxes for:  
 Scan as one multi-page document to concatenate all pages scanned to one doc.  
 Show TWAIN dialog to display the scanner manufacturer dialog box for scanner settings when the FTP scan is launched.  
 Use Default image format which will use the regular scan parameters for paper size, DPI, etc. when using the FTP scan option.
- Temp folder for images is used for TWAIN scanning to UNC path. A button to default to the machine %temp% path is provided.
- Section in HALFTP.INI tells the program what configuration section to use when performing the FTP scan i.e. destination FTP site, etc.
- Path to HALFTP.EXE will normally be the halFILE program folder on your network. Button to fill in this location is provided on screen.
- Body of Tag File allows configuration of a .TXT information file to be sent via FTP along with the image(s). Tag File Template button fills in parameters for File\_No, Company\_ID, and Date\_Scanned.

### SCAN EMAIL TAB

- Check the box to allow configuration of halfIE scan module to automatically launch email client on completion of scan and attach file to mail. *Note that all parameters are configured here then a desktop shortcut is setup to run the scan to email process – for example in TWAIN w/Imaging Pro scanning the desktop shortcut would be “#path to halfie# / HFTWAIN32PRO.EXE EMAIL”.*
- Check the appropriate configuration boxes for:
  - Scan as one multi-page document to concatenate all pages scanned to one doc.
  - Show TWAIN dialog to display the scanner manufacturer dialog box for scanner settings when the FTP scan is launched.
  - Use Default image format which will use the regular scan parameters for paper size, DPI, etc. when using the FTP scan option.
- Temp folder for images is used for TWAIN scanning to UNC path. A button to default to the machine %temp% path is provided.
- Key senders email address to be inserted in mail.
- Key text to be inserted as subject line of the email.
- Body of email can be predefined in the box provided. Switches for different parameters can be included to replace dynamic information with values in the email of the document. Email body template button is provided to fill box with a default template.