



# halFILE 2.1

## halFILE Workflow

### Workflow?

- Workflow is simply a clearly defined business process
- Workflow as it relates to pc's is the attempt to automate that same business process
- Business process should be reviewed/refined without regard to the pc
- Final automation should reflect the refined business process as much as possible



## haFILE Workflow

- “Hooks” – points in the document management process where automation can be initiated
- Often involves customization in order to truly reflect business process
- Don’t fall for the “canned” approach with the graphical workflow designer



## Hooks

- ScanExecute
  - Post batch processing
- IndexLoadExecute
  - Pre batch processing
- IndexMenuExecute
  - Triggered during index of current document
- IndexExecute
  - Triggered for current doc as it is being saved
- SearchExecute
  - Triggered for current doc as it is being saved
- Search user-defined menu
  - Triggered from hit list
- Search user-defined button
  - Triggered from hit list



## Scan Uses

- OCR documents
- Process forms
- Process barcodes
- Auto index



## Index Uses

- Process barcodes
- OCR documents
- Auto index
- Distribution
- Update lower level hierarchical databases
- Import information from external sources
- Email notifications
- Status checks
- e.halFILE search



## Search Uses

- Update lower level hierarchical databases
- Email notifications
- Distribution
- Initiate subsequent processes
- Update primary information



## Examples

- HFFlow32
- Pending Order
- HFNotify
- Search (via e.haFILE) from Index
- Barcode Recognition Server
- Image Capture Server
- Word Merge



## Web Forms

- Email notifications
- Updates of only certain fields
- Approve / Change Status



## Write Your Own

- HFAPI – halFILE COM object available to strategic partners
- Automate index and search operations
- Integrate viewer into your own applications
- Unlimited potential



## Real World Examples

- Augusta
- SNB
- EBA
- United
- Hargrove Crop Insurance
- Milliman & Robertson



The End

