

halFILE Procedure – Software Installation

The following outlines the steps to installing halFILE on a new workstation. Before running the installation it is recommended that the contents of the CD are copied into an HFW14SQL\HFINST folder on a network drive. However, these steps will work for running the install directly from the halFILE CD. In this case, where the instructions reference d:\hfw14sql\hfinst, you would use the root of the CD instead. Folders that are referenced as being in the d:\hfw14sql\hfinst would be folder off the root of the CD.

Before beginning the installation procedures outlines below, map a drive letter on each workstation to the drive where the *hfw14sql* resides on the server. For example if the hfw14sql folder was on a shared network drive called 'Serverd' then map the Serverd drive. Do not map the drive so the HFW14SQL folder appears as the root. Rather, when you browse the drive, you should find the HFW14SQL folder.

Installation #1 – halFILE

1. Run *Setup.exe* from the hfinst directory. For example,

Start | Run | d:\hfw14sql\hfinst\setup.exe

This installs the programs to the HFW14SQL folder. This installs the following:

halFILE programs into the halFILE Program Group.
Kofax Image Controls 1.01 – this is 16-bit image scan/display/print

NOTE: If desired, the mapped drive can be removed after installation if you wish to use Uniform Naming Convention (UNC) instead of a drive letter to access halFILE data locations. In this case, you will need to change the program short cuts to use the UNC path instead of the drive letter.

NOTE: If you wish to make this drive mapping permanent for all stations, you should (a) for Novell Netware, modify the login scripts to do the drive mapping or (b) for NT, set up a LOGON.BAT containing the necessary NET USE commands to map the drive.

Detailed installation instructions:

- a. From the **Start Menu** select **File-Run** and in the command line box that appears type:

d: \hfw14sql\hfinst \Setup.exe (substitute the drive letter of your Server Drive for drive d:)

- b. Click **Next** on the **Welcome Screen**.
- c. Enter your information including Company name and click **Next**.
- d. Click **Browse** and select the shared network directory where *halFILE™* is installed. (e.g. server drive letter:*HFW14SQL*). For the first workstation installed you will be asked to create this directory, answer *yes*.

Note: your system administrator should supply this location.

- e. After selecting the appropriate installation directory click **Next**.
- f. Select *Typical* setup and click **Next**.
- g. Accept the default program folder and click **Next**.
- h. Click **Next** to start copying files.

*Note: This process will take several minutes to complete, so please be patient. Even after the progress bar has reached 100% *halFILE™* must still make changes to the registry and system files.*

- i. A screen will appear telling you that your system needs to be restarted. Do not restart now since we can install other necessary software before re-booting.
- j. If this station is used as a Scan Station or an Import Station, insert a line in the **[Config]** that reads **Scan Station=n** (alpha Character; A, B, C, etc.) This should be a unique letter. So, if you have one scan station and one station where documents are imported, set **Scan Station=A** for the scan station and set **Scan Station=B** on the import station.
- k. If you wish to use UNC conversions, create shortcuts to **halFILE™** programs utilizing the UNC including:
 - HalFILE for Windows - \\servername\hfw14sql\halfile.exe
 - Basedit Utility - \\servername\hfw14sql\baseedit.exe
 - Key Verify - \\servername\hfw14sql\verify.exe
- l. If you have not set up an ODBC.NET file, copy the odbc.net from \hfinst\odbcnet to the halFILE program folder. This file must reside in the halFILE program directory even if you are not utilizing its features. ODBC.NET contains instructions for automatically configuring ODBC data sources used to connect to your halFILE database. Another way to do this is to copy ODBC.INI from c:\windows on a working station to c:\windows on new stations.

This would be a good time to reboot the system then you can begin to use **halFILE™**. If **halFILE™** asks you to register, note the Temporary Authorization # and call Technical Support to receive your Permanent Authorization #. You may select **Continue** to delay Registration for up to 30 days.

Installation #2 – 32-bit Report Layer

Note: The 32-bit Report Layer is required for halFILE to interface with Crystal Reports for generating reports. If Crystal Reports will not be used, this installation is not required.

From the newly created halFILE program group, select 'Install 32-bit Report Layer,' taking the defaults. Again, you do not need to re-boot yet.

Installation #3 – SQL Server Client Installation

Note: The SQL Server Client installation is required to allow halFILE to connect to SQL Server databases. If you are not using SQL Server as your database platform this installation is not required.

If this client station will be accessing a SQL Server database, run d:\hfinst\sqlclnt\setup.exe to install the 16-bit SQL Server client. Take the default target folder, specify TCP/IP as the client protocol and uncheck SQL Server Books On-line.

Installation #4 – 32-bit Scan Module

Note: This installation is required only for scanning work stations using the Kofax Adrenaline hardware or software engine.

If this client station will be using the **32-bit Scan Module** (Adrenaline hardware or software engines), run **d:\hfw14sql\hfscan32\setup.exe** and select the halFILE program directory as the target. After this is installed, edit halfile.ini (normally in c:\windows) and insert a line in the **[Config]** section that reads **ScanAppend=<halFILE path>|imgutil32.exe**. This will enable the Edit_Append option for scanning and appending pages to a document.

Installation #5 – Crystal Reports

Note: This installation is required if you wish to design or run halFILE reports.

If you wish to design reports on this station, install Crystal Reports 32-bit from the Crystal Reports CD. Install to the default location. The first time you go into halFILE on this station, you should select the File | Reports menu to define the location of the Crystal Reports Designer (CRW32.EXE).

Installation #6 – Acrobat Reader

Note: This installation is required only if you wish to view the halFILE User's Guide and other documentation that is provided on the CD.

If you want to view the documentation files from an icon and do not currently have Adobe Acrobat Reader on the computer, run **d:\hfw14sql\hfinst\Acroread\ar32e301.exe** (version 3.01, 32-bit) and accept all defaults. Then create shortcut to **halFILE™ Manual** utilizing the UNC conventions. ([\\servername\hfw14sql\docs\manual.pdf](http://servername/hfw14sql/docs/manual.pdf)).

Installation #7 – halFILE Printer

Note: This installation is required only if you wish to use the Print to halFILE program that converts documents printed from other application into TIFF Images

If you would like to print documents to a halFILE printer which converts the document to a TIFF Image and imports the TIFF Image into halFILE, install the **halFILE™ Printer Driver** from **d:\hfw14sql\hfinst\prntrdrv**, run **prntrdrv.exe**, accept all defaults. When finished rename the new printer which was installed to **halFILE Printer**.