

Fast Import

Addendum to halFILE for Windows™ Document Storage & Retrieval

Version 1.0
August 4, 2000



Systems Corporation
©Copyright 2000 by hal Systems Corporation
all rights reserved
Doc # hfw0017

Copyright 2000 by hal Systems Corporation.

halFILE is a trademark of hal Systems Corporation.

All information contained or disclosed by this document is considered confidential and proprietary by hal Systems Corporation, except for rights expressly granted by contract in writing to other parties concerning the data or information disclosed herein. All design, manufacture, use, reproduction, and sales rights are reserved by hal Systems Corporation. Under the copyright laws, neither the documentation nor the software may be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine readable format except in the manner described in the documentation. Copyright 2000 by hal Systems Corporation. All rights reserved.

Table of Contents

Fast Import: Application Overview	2
Program Features.....	2
Fast Import Setup	2
Running Fast Import.....	3

Fast Import: Application Overview

Fast Import is an add-on utility to halFILE (version 1.4 or later) which helps to gather documents from multiple applications and place them into halFILE. Fast Import monitors folders on a network where these documents may be placed, and interactively file and index selected documents. Multiple folders can be set up with each folder corresponding to a key index field that is posted to the database.

Fast Import allows users to save documents to a specified folder that represents a key index field in the database. Once a “folder” is completed the user can run Fast Import, select the appropriate key index field folder, application, database, and basket and Fast Import will import each document into halFILE indexing based on the name of the folder. If the key index field is also a lookup field then the additional information pulled from the external database will be posted to the database record as well. The system allows the user to review each document in the folder and selectively choose which documents will be imported. The original documents can optionally be deleted so that the only copy remaining in the system is located within halFILE For Windows. Documents that are imported can be a mixture of images and associated documents (e.g. Microsoft Word documents, Excel documents, Adobe Acrobat files, etc).

A typical example of using Fast Import would be for a title company who creates a number of files during the closing process for a particular title number. As documents are created for a particular title number, they are saved in a directory that is named the same as the title number. Once the customer completes the closing process, the title company can use fast import to select the documents that need to be retained for that title number and can quickly index and store all of the documents in halFILE for Windows. If the customer also has a closing application such as SoftPro, additional information such as buyer, seller, property address, etc. can be pulled and posted in addition to the title number without any keystrokes from the user.

Program Features

1. Handles a mixture of image files and associated documents.
2. Automatically staples image files into documents if they are named with an extension that represents the page number .001, .002, .003, etc.
3. Supports external database lookups and integration with closing packages to pull in information in addition to the single key index field.

Fast Import Setup

The Fast Import program (fastimp.exe) should be placed in the main halFILE For Windows directory where you normally launch halfile.exe. Any station that needs access to Fast Import can be configured simply by creating a shortcut on the desktop to fastimp.exe.

After the icon has been created, you need to set up fastimp.ini. The following describes the Fast Import ini file (fastimp.ini) options. The parts in curly brackets are documentation only and are not part of the INI file. The fastimp.ini file should be in the same directory as fastimp.exe and can be created/modified with any standard text editor such as notepad.exe in Windows.

[xxxHFWyy]

FastImportPath=f:\hfw14sql\baskets\fastimp\

{this is the top level path where you will create folders based on the key index field. If your key index field is a title number and you want to store documents for title #12345 then you would create a directory in the form f:\hfw14sql\baskets\fastimp\12345\ and save all documents related to that title number in this folder}

IndexByFolder=TRUE

{A value of **true** indicates you wish to index the documents based on the name of the folder in which they are stored. A value of **false** will import the documents and leave them in the basket ready to be indexed manually}

IndexField=File_Number

{When IndexByFolder is set to **true**, this is the name of the field in the halFILE database that will have the corresponding folder name you select posted to it.}

LookupConnect=ODBC;DSN=xxxHFWyy32;DBQ=xxxHFWyy;UID=sa;PWD=password

{If you have an external lookup configured you will need to supply the appropriate ODBC connect string to a 32-bit data source in order to have Fast Import pull in the additional information. The remaining parameters for the lookup are controlled under File-Databases-Lookups in halFILE or in hfglobal.ini for closing file integration}

Running Fast Import

The steps to running Fast Import are as follows:

1. Double click the Fast Import icon.
2. Select the appropriate application, database, and basket where you wish to import the documents.
3. Select the appropriate folder that corresponds to the information you want to import. Once the folder is selected any related documents stored in that folder will be displayed in the list of documents available for import.
4. You can selectively add documents to the import list or just click add all to index and store all documents in the selected folder in halFILE For Windows.
5. Uncheck the **delete original documents** box if you wish to keep the original documents online in addition to a copy that is stored in halFILE. Typically, the delete option would be checked so that only one copy remains on the system and that one copy is stored and maintained by halFILE For Windows.
6. Once you have all the documents you wish to import in the import list click **import**. After a few moments (depending on the size of the folder this may take quite some time), you will be presented with an import complete message. You can then either import additional folders or exit the program.