

# Associated Document Support

## Addendum to halFILE for Windows™ Document Storage & Retrieval

Version 1.4 SQL  
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Systems Corporation

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doc # hfw0018

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## Overview

halFILE for Windows 1.2SQL and later supports 'Associated Documents.' Associated documents are documents in which an association has been defined in Windows based on the document extension. In other words, in Windows, you can associate anything with a .DOC extension to Microsoft Word, anything with a .XLS extension to Excel and so forth. By adding this support, halFILE can provide support not only images and text files but for numerous other document types.

## Requirements

To support Associated Documents, changes had to be made to a couple of tables within halFILE for Windows as follows:

Database	Table	Field	Change
xxxBSKT.MDB	<basket table>	DocumentType	from integer to text (length 4)
xxxHFWdd.MDB	Primetable	PRTYPE	expanded text field from length 1 to 4

The following program changes were made:

HALFILE.EXE  
INDEX.EXE  
HALMAIL.EXE  
HFPIMP.EXE  
UPGRADE.EXE

## Upgrading Existing Sites (prior to version 1.2SQL)

UPGRADE.EXE provides options for converting the above tables to the new format and must be run before the Associated Document Support feature can be used.

When you run UPGRADE.EXE, you are presented with 3 options, listed below:

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*If you encounter an error during the upgrade process, do NOT restart it before speaking with Technical Support personnel.*

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- **Upgrade Parameters** – reviews the PARAMTRS.MDB database containing system parameters and upgrades it to the latest halFILE 1.2SQL form. There were no changes to the system parameters for Associated documents so this option is not required unless you have not run this selection. Call Technical Support if you are not sure if this option is needed.
- **Upgrade Baskets** – finds all basket databases (xxxBSKT.MDB where xxx is your application id) and converts them to the required format. This option copies each database found to .SAV as a back up.
- **Upgrade Databases** – finds all the image database files (xxxHFWdd.MDB where xxx is your application id and dd is the document type) and converts them to the required format. This option copies each database found to .SAV as a back up unless you uncheck the back up option.

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*If you uncheck the back up option, be sure to have a reliable back up of your databases before beginning the upgrade.*

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## Setting up Associations

Within Windows 95, associations can be set up within Explorer. Select the View\_Options menu and then the File Types tab. This will show you existing associations as well as let you add new ones.

## Importing Associated Documents

There are several ways to import Associated Documents into halFILE including:

1. Use Tools\_Import menu selection within halFILE for Windows
2. Using the Explorer Send To feature.
3. Using HALMAIL when a document is attached to an e-mail message.

### Importing using Tools\_Import

To import Associated Documents using Tools\_Import:

1. Set **File Type** the 'associated.' By default this is set to 'image.' If you fail to change the File Type and import documents you will receive an error when you try to view the documents.
2. Find the document or documents to import and add them into the import list using the Add to List or Add All buttons. Note that all documents must exist in the same directory.
3. Select the menu File\_Begin Import.
4. Answer the 'After importing documents, do you wish to delete the original image files?' question. Answer yes if you want document to be removed after it has been imported into the halFILE basket.
5. The import screen is displayed. Here you can:
  - a. To view a document, double click the document number in the import list. This will look up the File Associated and run the Associated Application, automatically loading the document. For example, if you import a Word document and double click on the document in the Import List, then Word loads and shows the document.
  - b. Press the Import All Documents button to import all the documents in the Import List.
  - c. Select a document and press the Import Document button to import only the selected document.
  - d. Press the Remove Document button to remove a document from the Import List. This does not remove the actual document file.
  - e. Press the Close button to close the import window.

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***IMPORTANT: You are responsible for closing the application when you are finished viewing the document. Failure to do so will result in out of memory errors when too many applications are running at the same time within Windows.***

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### Importing Documents using the Explorer Send To Feature

Windows Explorer includes a special 'send to' feature that lets you route a document to e-mail, a printer or another application. To set up 'Send to halFILE,' perform the following steps:

1. Go into Windows Explorer.
2. Open up the halFILE program directory (for example, F:\HFW12SQL).
3. Right click on HFPIMP.EXE and select 'create shortcut.' This will create a 'shortcut to HFPIMP.EXE' entry.
4. Right click on 'shortcut to HFPIMP.EXE' and select 'cut.' This cuts the shortcut to the Windows clipboard.
5. Change to the c:\Windows\SendTo folder.
6. Inside that folder, right click and select 'paste.' This pastes the 'shortcut to HFPIMP.EXE' into the SendTo folder.
7. Finally, right click on 'shortcut to HFPIMP.EXE' and select 'rename.' Rename the shortcut to 'Send to halFILE.'

HFPIMP.EXE is a special import program that will run when you select 'Send to halFILE.' Using this program you can select the halFILE Application, Database and Basket and either place the document into the basket for later indexing or index the document immediately.

## Importing Documents Attached to an E-mail message

If you are using a MAPI-compliant e-mail system such as Microsoft Mail, you can use HALMAIL to view messages and index attachments. To do this, run HALMAIL from your halFILE program directory. When you view a message with an attached document, an 'Index Document' button is displayed. Clicking this button will send the document to halFILE via HFPIMP.EXE in the same way that was described above.

### **Reviewing the Basket Contents**

To view documents in a basket, use Tools\_Basket Status. Click once on images or text files since halFILE is the viewer for those document types and loading is immediate. Double-click associated files to load the target application and view the document.

### **Archiving Associated Documents**

Archive Associated Documents in the same way you archive images or text files.

### **Searching and Viewing Associated Documents**

When you search your halFILE Database and double-click on a document in the hit list, the associated application will be loaded if the file is identified as an association. As noted above, you are responsible for closing the application when you are through viewing the document. In cases where most documents are of the same type, you may want to leave the target application open to speed up load time.

If the document is on a rewritable device, you can change the document using the target application and save it back to disk. If the document is on a read-only device such as a CD, you can change the document and save it as a new document name. You could then import to new document into halFILE and now have versions of the same document. To provide a tracking of the versions, add a version or date field to your halFILE database.

### **Document Types Tested**

In our labs, we have successfully imported the following document types:

Word 97

Excel 97

Adobe Acrobat

HTML Internet web pages

TIFF Images using the Wang Viewer as the target application

Windows Bitmaps (BMP)

JPEG Images

WAV Sound Files

MIDI Music Files

AVI Videos

### **Organizing Documents**

Use halFILE for Windows as your Document Binder. Set up a database that contains all the search fields needed to find and group your documents. Archive your documents to CD and share them across the network. A sample Document Binder database in file could consist of:

Binder Name	Description of documents in the Binder. This could be a table driven and validated field such as SIM01 for the Simmons Account.
OriginalDocumentName	the original document name
CreationDate	date document was created
ModifyDate	date document was last modified
Owner	person responsible for the document
Remarks	comments about the document

Of course, the database can be customized to suit your needs. Then, using this Binder concept, you could search for the Simmons Account and find Word documents, scanned images, Excel spreadsheets all having to do with that account.

### ***Other Ideas***

You have an application requiring the scanning of images but you want to mark up those images and store them in halFILE. Since halFILE's Viewer is not capable of viewing annotations, you can:

1. Scan using halFILE into a temporary basket as single page documents (every document will have a .001 extension..
2. Import those documents as Associated Documents where you've set up an association of .001 to the Wang Viewer that comes with Windows 95 or HALIMG32.EXE that comes with halFILE for Windows 1.2SQL.
3. When the document is accessed, instead of viewing it in halFILE, the Wang Viewer or HALIMG32 will be run to display the document. These applications provide the ability to mark up the document with such tools as highlighter, lines, rectangles, sticky notes, rubber stamps and more.