

Associated Import

Addendum to halFILE for Windows™ Document Storage & Retrieval

Version 1.4 SQL
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Systems Corporation

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Overview

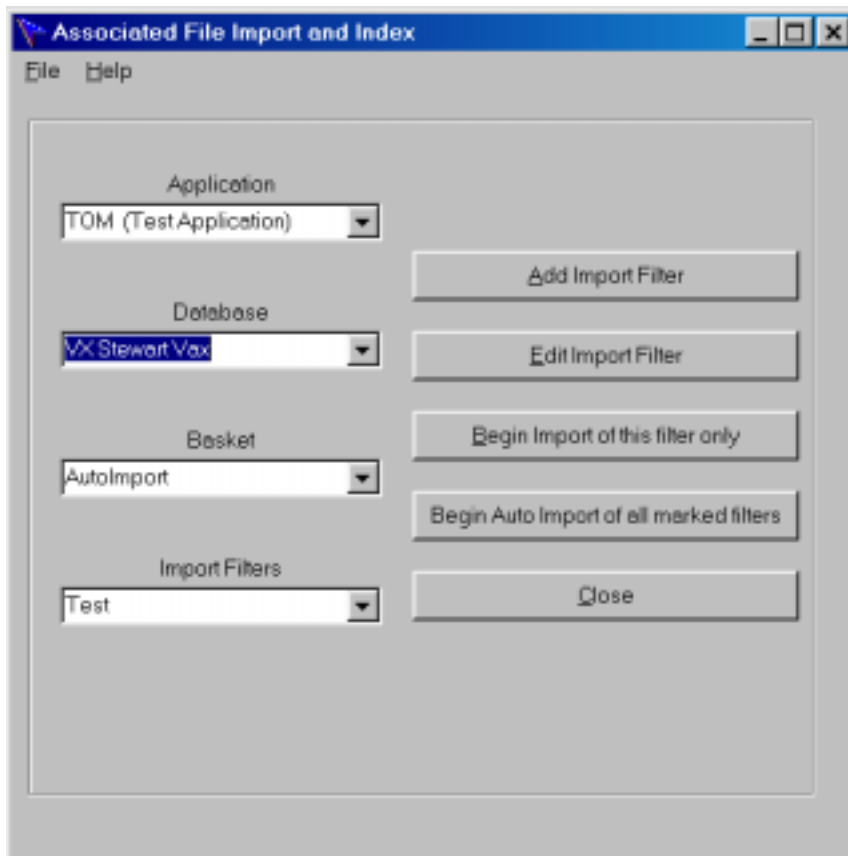
The Associated Import Program, ASSOCIMP.EXE, is used to import associated files (PDF files, Word documents, etc.) into halFILE. The program can fill out designated index fields using the file name of the file being imported. This document describes how the program works and how you can set your import.

Requirements

This program requires halFILE version 1.4SQL or later and the AssocImp program. AssocImp can be installed from the AssocImp folder on the halFILE CD. When you run the install, select the halFILE program folder as the target folder.

Operation

When you run AssocImp, you are first presented with a screen where you select the Application, Database, Basket and Import Filter as shown below.



The following buttons are available:

Add Import Filter – this adds a new import filter for the selected Application and Database.

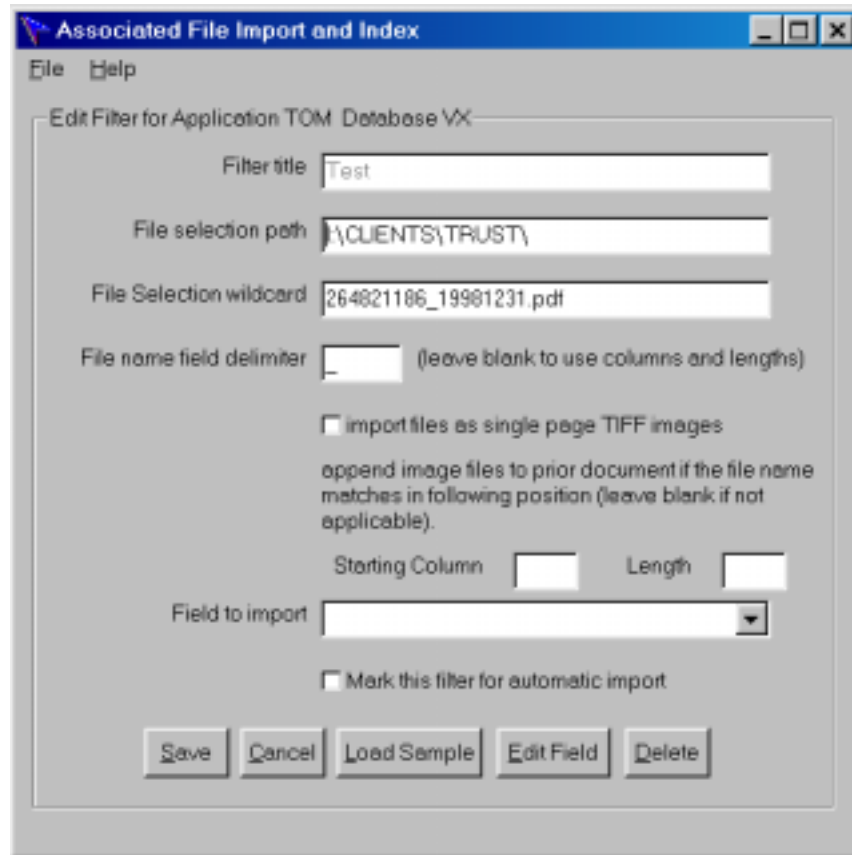
Edit Import Filter – this edits the import filter that has been selected in the Import Filter box.

Begin Import of this filter only – this executes the selected import filter, thereby putting the designated PDF files into the system and indexing them as defined by the filter.

Begin Auto Import of all marked filters – this executes every import filter that is marked for auto import.

Setting up an Import Filter

When you click add or edit an import filter, the following screen is shown.



You fill out the following boxes as follows:

Filter Title – this describes the filter such as “Tax Statements.”

File Selection path – this is the path where the PDF files to import will be found.

File Selection wildcard – this is the file designation for the PDF files. For instance, if you want all of the PDF file found in the designated path, you would enter ‘*.PDF’. If you wanted only the PDF files that began with ‘264,’ you would enter ‘264*.PDF’.

File name field delimiter – this designated the delimiter that is used to identify fields within the file name. For instance, one of your sample files was ‘20-1034-00_12311998_FRANK S ORDWAY_00035.pdf’. The field delimiter is the ‘_’ character. If you leave the field delimiter blank, the system assumes that you are not using a delimiter, rather you will designate the starting position and length for each field in the file name.

Import files as single page TIFF images – check this box only if the files being imported are single page TIFF images and therefore is viewed using halFILE’s built in viewer.

Field to import – when you are editing an Import Filter, you have this drop down box to define the fields that will be automatically indexed. You select the field from the drop down box, then click the Edit Field button which displays another screen (see Editing the Field Information section below).

The buttons at the bottom of the Edit Import Filter screen include:

Save – saves the import filter

Cancel – cancels any changes you have made

Load Sample – lets you select a file name from an Explorer-like screen, then automatically fills in the File Selection path and File Selection wildcard screens.

Edit Field – edits the field information

Delete – deletes the Import Filter

Editing the Field Information

If you designated a field delimiter, the following screen is displayed when you select a field to import from the drop down box and click the Edit Field button. You would select only those fields that need to be indexed when the Import Filter is processed.

The screenshot shows a dialog box titled "Associated File Import and Index". It has a menu bar with "File" and "Help". The main area is titled "Field Specification" and contains the following elements:

- "Field to Import": A text box containing "File_Number".
- "Posting Option": A section with two radio buttons: "Post data found in the report" (selected) and "Post data keyed by operator".
- "Field # in File Name": An empty text box.
- "Date Format": A dropdown menu showing "non-date".
- Buttons: "Save", "Cancel", and "Delete" at the bottom.

Posting Option: The 'Post data found in report' option is selected if you want the system to parse a part of the PDF file name and automatically fill in the index field. The 'Post data keyed by operator' option is selected if you want the system to ask you for the data to post when you run the import filter.

Field # in File Name: This option designates which field in the file name to post. For instance, if the file name is '20-1034-00_12311998_FRANK S ORDWAY_00035.pdf,' the field # is set to '1' if you the data you want to post is '20-1034-00.' To post the name 'FRANK S ORDWAY' the field # would be 3.

Date format: This defines how the date is formatted in the file name. Select the appropriate option from the drop down list. In our example, '12311998' the date format would be 'mmddyyyy'. Note that to prevent errors during import, it is important to consistently use the same date format in all file names that will be used for a given filter. Also, you should use zero-fill the month and day fields consistently (01031999 not 131999) to ensure that the system will correctly index the date field.

If you did not designate a field delimiter, the following boxes are displayed (see below):

Posting Option: same as above.

Select column: designated the starting column for the data to post.

Length: designates how many characters from the file name to use.

Date format: same as above.

