

# Auto Fill

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

Version 1.4 SQL  
December 7, 2000



Systems Corporation

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doc # hfw0020

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TABLE OF CONTENTS

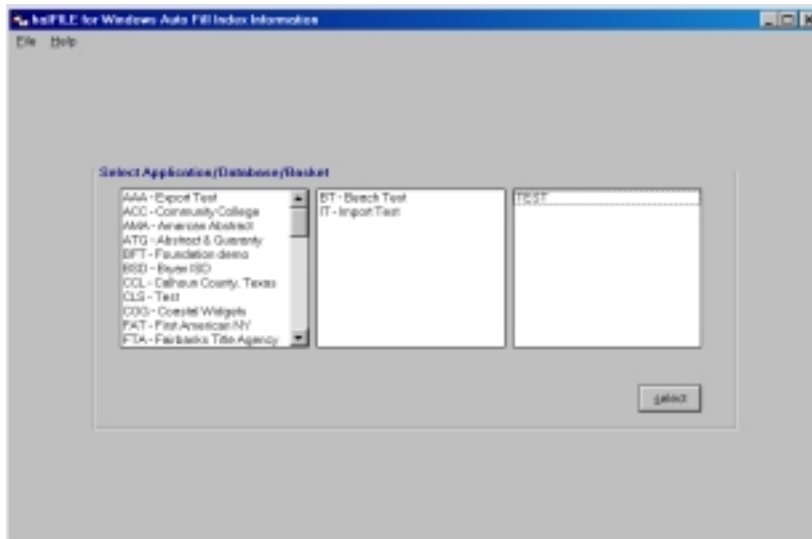
Overview..... 3  
Setup ..... 3  
Processing a Basket..... 6  
Example Procedures when using Auto Fill..... 6

## Overview

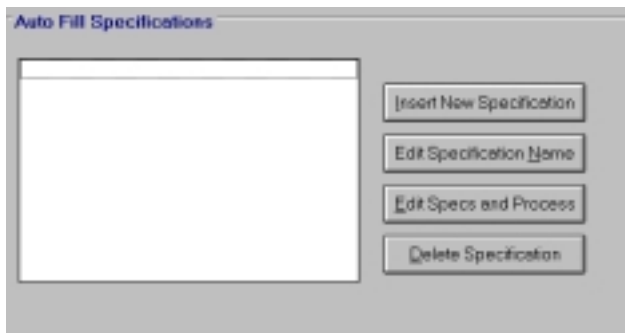
Autofill is a utility used to fill in information into halFILE database fields in order to speed data entry. With this utility, you select an application, database and basket and define the parameters for auto filling data fields in that database. Then you can process a selected basket.

## Setup

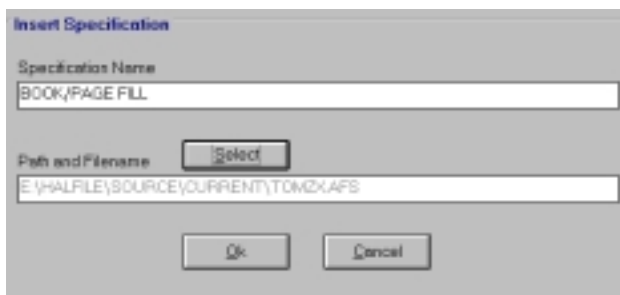
When you run Autofill.exe, you are first presented the following screen to select the Application, Database and Basket. Make the selection and click the **Select** button.



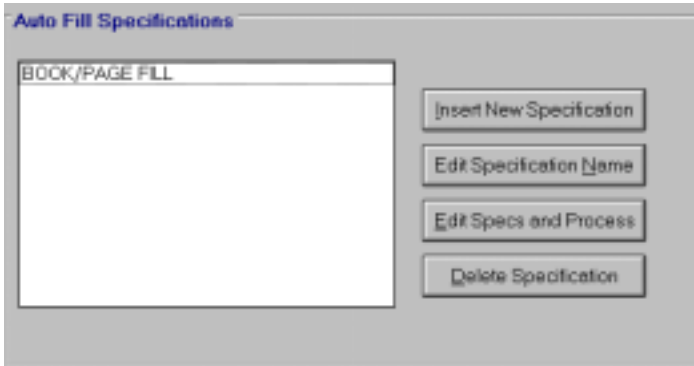
The next step is to define an Auto Fill Specification file that will store the auto fill parameters. The specification can be used to process documents for any basket for the selected database. As shown below, to add a new specification file, click **Insert New Specification**.



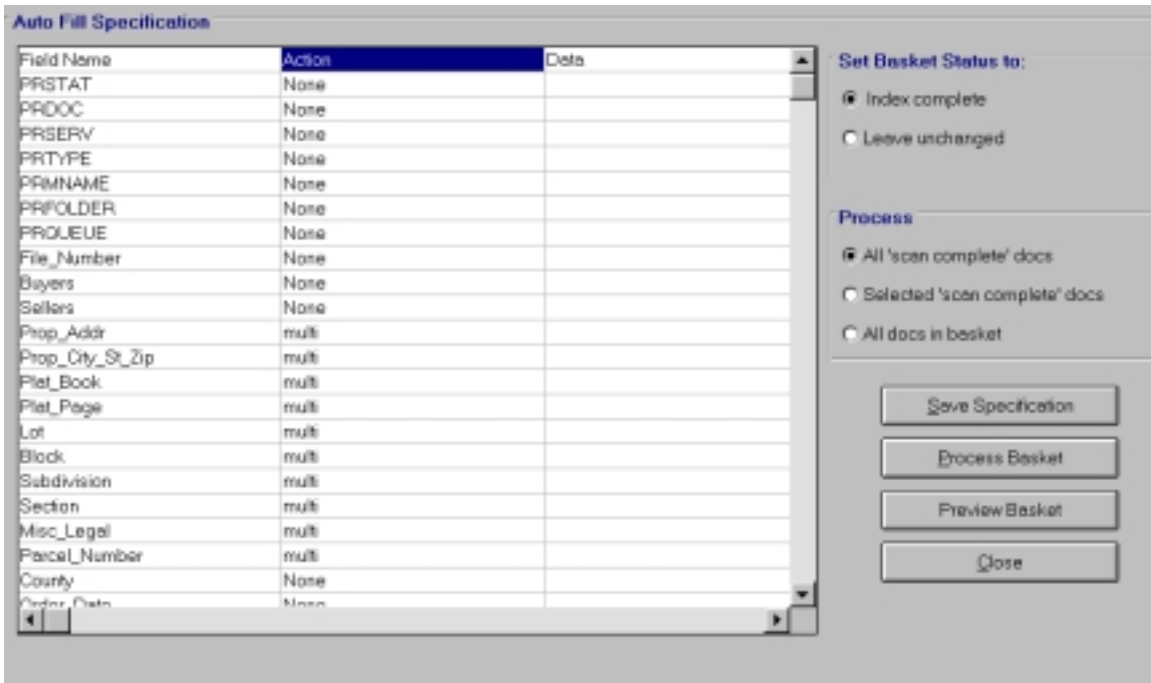
The following screen is displayed when you add a new specification file. Provide a name for this Auto Fill Specification which appears in the Specifications list and click the Select button and select a path then enter the file name for the specification file. Do not use long file names.



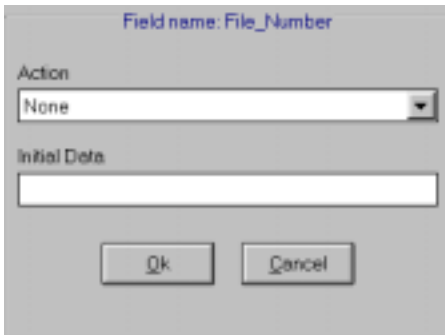
Click **OK** and the specification file is built and appears on the Auto Fill Specification file list as shown below.



The next step is to define the Auto Fill parameters. Highlight a specification and click the **Edit Specs and Process** button to view the set up screen. As shown in the sample screen below, the fields for the selected database are displayed in a grid along with an Action column and a Data column. The Action column is used to define what action to take for the field when the Auto Fill Specification is processed. The Data column is used to define the data that the Auto Fill process will post to the database.



To select a field for auto fill, double click the field which displays the following form. Note that you cannot Auto Fill multi-entry fields.



When you drop down the Action box, you have the following options:

1. **None** – no Auto Fill processing will occur.
2. **Fill Once** - the data to auto fill is entered once at the beginning of processing a basket and the process fills that data into every document in the basket. Example: A county name that applies to every document in the basket.
3. **Increment for Each Document** - the data is entered at the beginning of processing a basket. The field, which must be defined as numeric, is incremented by 1 for every document in the basket. Example #1: a File Number that you want the system to automatically assign and auto fill. Example #2: A Clerk Number that you want to fill in automatically for documents that are scanned in Clerk Number order.
4. **Increment for Each Page** - the data is entered at the beginning of processing a basket. The field, which must be defined as numeric, is incremented by the number of pages in the prior document. Example: A page field that you want to fill in automatically for every page each document in the basket. If the first document begins with page 1 and the document includes 4 image pages, then the second document will be auto filled with page 5.

Once you have selected the appropriate action settings, click **OK** and the setting will show in the Auto Fill Specifications grid as shown below.

Field Name	Action	Data
PRSTAT	None	
PROOC	None	
PRSERV	None	
PRTYPE	None	
PRMNAME	None	
PRFOLDER	None	
PROQUEUE	None	
File Number	Increment For Each Document	1
Buyers	None	
Sellers	None	
Prop_Addr	multi	
Prop_City_St_Zip	multi	
Plat_Book	multi	
Plat_Page	multi	
Lot	multi	
Block	multi	
Subdivision	multi	
Section	multi	
Misc_Legal	multi	
Parcel_Number	multi	
County	None	
Order Date	None	

On the screen, there are two other options to consider as described below.

**Set Basket Status to** – this option defines how the Auto Fill process will handle a document’s Basket Status. If you select **Index complete** then the auto-filled document will have a status of ‘Index Complete.’ If you select **Leave unchanged** then the Basket Status remains as it was before the Auto Fill process was run.

**Process** – this option defines which documents in the basket are selected by the auto fill process. If you select **All ‘scan complete’ docs** then the process will auto fill any document in the basket having a status of scan complete. If you select **Selected ‘scan complete’ docs** then the process will show a list of all the documents having a status of ‘scan complete’ and let the user select which documents to process. If you select **All docs in basket** then every document in the basket is auto filled, regardless of status.

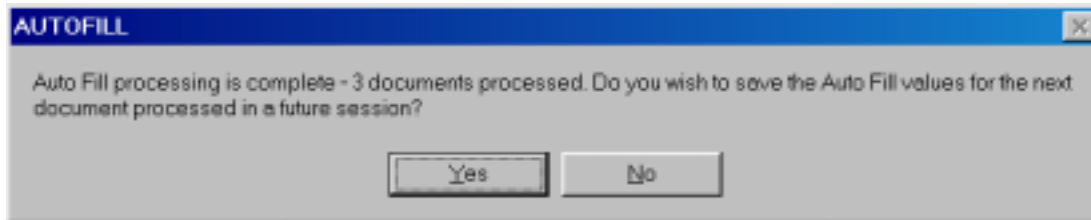
To save the specification to the designated specification file, click the **Save Specification** button. To preview the basket in order to see what documents are to be processed, click the **Preview Basket** button.

To process the basket and perform the designated auto fill options, click the **Process Basket** button. The **Close** button closes the Auto fill utility.

### ***Processing a Basket***

To process a basket, click the Process Basket button. If the *Selected 'scan complete' docs* option was chosen then a screen shows the documents which have a status of scan complete. You select which documents to process and click the **Process** button.

The system will ask the question shown below. Answer YES if you want to keep running totals of auto incremented fields from session to session. This will update the Value column in the specifications file to reflect the last document processed.



After processing a basket, you should search for the documents to verify that the data was correctly posted.

### ***Example Procedures when using Auto Fill***

When the Auto Fill process can fill in all the necessary data fields so the document will be entirely indexed after the process is completed, we recommend the following process:

1. Set up your Auto Fill specification and set the **Set Basket Status to** option to ***Index complete***.
2. Scan documents into a basket.
3. Run Auto Fill. Select the Application, Database and Basket and click **Select**. Select the Auto Fill specification to run and click the **Edit Specs and Process** button. Review the auto fill parameters and make any adjustments needed. Click the **Process Basket** button and answer Yes to the save values question.
4. Search for the documents and review the auto filled values.
5. Archive the images in the basket.

When the Auto Fill process does not fill in all the necessary data fields and you wish to add the rest of the data immediately after auto fill, we recommend the following process:

1. Set up your Auto Fill specification and set the **Set Basket Status to** option to ***Leave unchanged***.
2. Scan documents into a basket.
3. Run Auto Fill. Select the Application, Database and Basket and click **Select**. Select the Auto Fill specification to run and click the **Edit Specs and Process** button. Review the auto fill parameters and make any adjustments needed. Click the **Process Basket** button and answer Yes to the save values question.
4. Run Index and add any addition information to each document in the basket.
5. Archive the images in the basket.

When the Auto Fill process does not fill in all the necessary data fields and you wish to add the rest of the data later, we recommend the following process:

1. If possible, include a field in your halfILE database that could be used to identify document which are not completely indexed.
2. Set up your Auto Fill specification and set the **Set Basket Status to** option to ***Index complete***.
3. Scan documents into a basket. If you use a field to identify unfinished documents, have Auto Fill set the status to the unfinished indicator.
4. Run Auto Fill. Select the Application, Database and Basket and click **Select**. Select the Auto Fill specification to run and click the **Edit Specs and Process** button. Review the auto fill parameters and

make any adjustments needed. Click the **Process Basket** button and answer Yes to the save values question.

5. Archive the images in the basket.
6. At a later date, you can search for documents that are not completed and add any addition information. You would also change the Unfinished status field to finished.