

# Email Notification

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

Version 3.0  
May 18, 2009



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Doc # hfw0028\_30

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## E-mail Notification: Application Overview

This documents the E-Mail Notification feature for halFILE 2.1 or later. E-mail Notification is an add-on utility to halFILE which can be used to notify parties when a change to a document occurs. It was designed for the Title Industry to notify customers when a change of Order Status occurs. However, the feature set up is open and can be applied to other uses.

Email Notification occurs on two levels. Level I performs e-mail notification only. If a designated field is changed in the Index or Search module, then the system can be configured to send an e-mail notification to e-mail addressees designated by a field in the database.

Level II of E-mail Notification involves determining if the designated field was changed to a particular value and, if it was, selected document images are packaged and delivered to e-mail addressees designated by a field in the database.

## Program Features

1. Handles multiple e-mail addressees if the database field is a multi-entry field.
2. For Level II, documents to be packaged are displayed. The user can select only certain documents to be delivered.
3. For Level II, the user can override the e-mail addressees by removing or adding addressees.

## E-mail Notification Setup

The E-mail Notification feature is part of Index (HFINDEX32.EXE) and/or Search (HFSEARCH32.EXE) and the E-mail Packaging and Notification program (HFNOTIFY32.EXE). HFNOTIFY32.EXE should be placed in the halFILE Program Folder where you normally launch halFILE.

To configure E-mail Notifications, go to the Tools-Options menu of the Index or Search module and select the Notifications tab. This will set up the trigger that runs the notification module (HFNOTIFY32.EXE). You must, however, follow the guidelines below for the HFNOTIFY.INI to configure the notification process.

The configuration for this feature is in hfglobal.ini and hfnotify.ini, both found in the halFILE Program Folder.

### HFGLOBAL.INI

The following describes the hfglobal.ini options. The parts in curly brackets are documentation only and are not part of the INI file.

[xxxHFWyy] {section header – xxx is the halFILE Application ID. Yy is the halFILE Database ID}

**NotifyOnIndex=TRUE** {If set to TRUE, this key enabled the notify feature in the Index module}

**NotifyOnSearch=TRUE** {If set to TRUE, this key enabled the notify feature in the Search module}

**NotifyNewRecords=TRUE** {trigger notification even in the Index module as new records are added}

**NotifyChangeField=Status\_of\_Title** {this indicates that the halFILE database field, in this case Status\_of\_Title, that should be examined to see if a change in the record occurs which should trigger the notification}

**NotifyExecute=e:\halfile\hfnotify32.exe %APPL%;%DOCTYPE%;%DOCNUM%** {this key designates the program that the Index or Search module will run if the value of the Notification feature is enabled.}

**NotifySubject=Title Order Status Update File Number: #File\_No#** {this key tells the system what appears in the subject of the e-mail. Any wording bound by the # sign will be substituted with the database field value if the wording matches a database field name. So, in this example, the system substitutes #File\_No# with the real File # from the document being updated.}

**NotifyBody1=Old Status: #!Status\_of\_Title#<BR>** {The first line of the body of the e-mail. Again, note that the field substitution is in effect. Note that you may use HTML tags in the body to format your e-mail as needed.}

**NotifyBody2=New Status: #Status\_of\_Title#<BR>** {Second line of the body of the e-mail}

**NotifyBody3=Order Number: #File\_No#<BR>** {Third line of the body of the e-mail}

**NotifyBody4=Customer File Number: #Client\_File\_No#<P>** {Fourth line of the body of the e-mail}

{You can have as many NotifyBody*n* lines as needed. They should be numbered consecutively}

## HFNOTIFY.INI

HFNOTIFY.INI controls what HFNOTIFY.EXE does and is described below.

[**xxxHFWyy**] {section header – xxx is the halFILE Application ID and yy is the halFILE Database ID}

**Match1Field=Type\_of\_Search** {This identifies the field that should be examine to determine what docs will be selected for the e-mail.}

**Match1Value=F;FASP;FR;L;LASAP;LR** {If Type\_of\_Search field matches one of these, then the program uses the search below to find the match.}

**Match1Select=Select \* from primetable where File\_No='#File\_No#' and Document\_Type in ('RE', 'DO', 'TX')**

{this is the actual select clause the program uses to find the docs. In this example, if the Type of Search is F or FASP or FR or L or LASAP or LR, then find any document\_type equal to RE, DO or TX and send those.}

**Match1Connect=HAL;TO** {The system can actually look in a different database to locate the documents to attach to the notification. This tells the system which halFILE Application and database to search for attachment documents.}

**Match1EmailField=Contact** {This tells the system which database field contains the e-mail address or, if the field is multi-entry, addresses, to send to.}

**Match1Subject=Title Orders have been closed** {This tells the system what to use as the E-mail Subject line}

**Match2Field=Type\_of\_Search** {This identifies the field that should be examine to determine what docs will be selected for the e-mail. This is the 2nd match - for updates. So, basically, it is an alternative match.}

**Match2Value=UP;UPD;UPCH** {If Type\_of\_Search field matches one of these, then the program uses the search below to find the match.}

**Mach2Select=Select \* from primetable where File\_No='#File\_No#' and Document\_Type in ('URE', 'UDO', 'UPCH')** {this is the actual select clause the program uses to find the docs. In other words, if the Type of Search is UP or UPD or UPCH, then find any document\_types of URE, UDO or UPCH and send those.}

**Match2Connect=HAL;TO** {This tells the system that the docs are found in the TO database}

**Match2EmailField=Contact** {This tells the system where the e-mail address are}

**Match2Subject=Title Orders have been closed** {This tells the system what to use as the E-mail Subject line}

**Match1SendDocsField=Status\_of\_Title** {This defines the field to match on to determine if documents should be delivered as an e-mail attachment – Level II notification}

**Match1SendDocsValue=C;AT;** {This defines the values to match for to determine if documents should be delivered as an e-mail attachment – Level II Notification}

## Running E-mail Notification

The steps to running E-mail Notification are as follows:

1. In halFILE Search, update a record, changing the designated SearchNotifyChangeField.
2. If this is a Level I notification only, HFNOTIFY.EXE is run to send the e-mail without user intervention. If the field was changed to a value which would trigger the Level II notification then HFNOTIFY.EXE is executed.

3. For Level II notification, HFNOTIFY32.EXE displays a screen showing any documents found when the program ran the Match/Select clause. The user may mark selected documents to send or may send all documents. Also, the user can send to the e-mail addresses designated by the selected e-mail database field and may add and remove addressees.

## **Forcing Level I Notification**

To force a Level I notification where the notification is sent without any attached documents, set the Match/Select clause in HFNOTIFY.INI so it will never find a match. This will prevent it from ever sending attached documents. Also, set NotifyNewRecords=TRUE in HFGLOBAL.INI so it sends the notification whenever a new record is added to the database.