Auto Fill

Addendum to halFILE for Windows™
Document Storage & Retrieval

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Systems Corporation

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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.
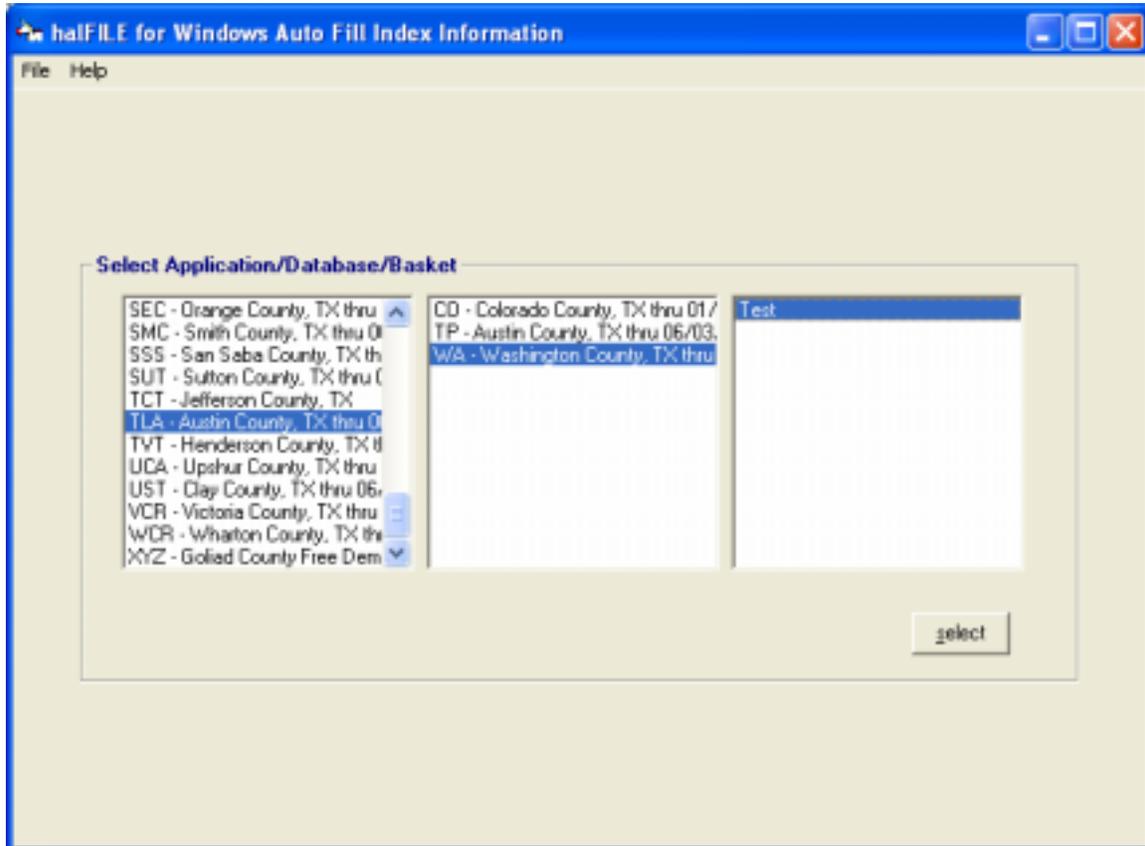
The next step is to define an Auto Fill Specification file that will store the auto fill parameters. The specification can be used to process documents for any basket for the selected database. As shown below, to add a new specification file, click **Insert New Specification**.
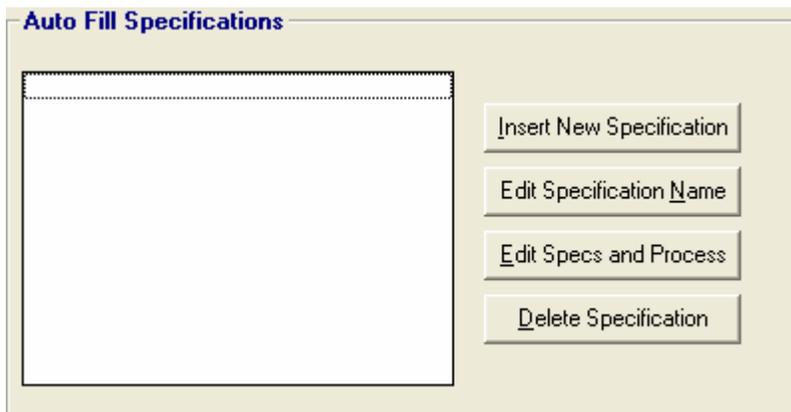
The following screen is displayed when you add a new specification file. Provide a name for this Auto Fill Specification which appears in the Specifications list and click the Select button and select a path then enter the file name for the specification file.

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 and 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 is 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.

Auto Fill Specification
\\Ausimg01\AUSIMG1Sys\websites\www.countyrecords.com\halfile\TLAWA_BkPg.AFS

Field Name	Action	Data
PRSTAT	None	
PRDOC	None	
PRSERV	None	
PRTYPE	None	
PRMNAME	None	
PRFOLDER	None	
PRQUEUE	None	
Book	None	
Page	None	
Clerk_Number	None	
Instrument_Type	None	
Grantor	multi	
Grantee	multi	
Property_YN	None	
Acres	multi	
Sub_Block_Lot	multi	
Brief_Legal	None	
Prior_Reference	multi	
Instrument_Date	None	
Filing_Date	None	
Remarks	None	
Indexed_By	None	
GF_Number	None	

Set Basket Status to:
- ⦿ Index complete
- ○ Leave unchanged

Process
- ⦿ All 'scan complete' docs
- ○ Selected 'scan complete' docs
- ○ All docs in basket
- ○ Select database records where

[Save Specification]
[Process]
[Preview Basket]
[Close]

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

Field name: Book

Action
[Fill Once ▼]

Initial Data
[1230]

[Ok] [Cancel]

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.

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 suto filled, regardless of status.

Selecting *Select database records where* lets you enter a SQL select clause to define how records will be selected in the box immediately below this option. This option ignores the selected basket and goes directly against the database to select the desired records. Therefore, it can be used to indexed documents that are no longer in a basket. Examples of the select clause include:

Clerk_Number between '2006001234' and '20064433' order by Clerk_Number

The above clause selects a range of documents based on the clerk numbers given. The order by clause is important to ensure that the records come back in Clerk_Number order.

**File_Number like '2006%' order by File_Number**

The above clause would select any File_Number that began with "2006."

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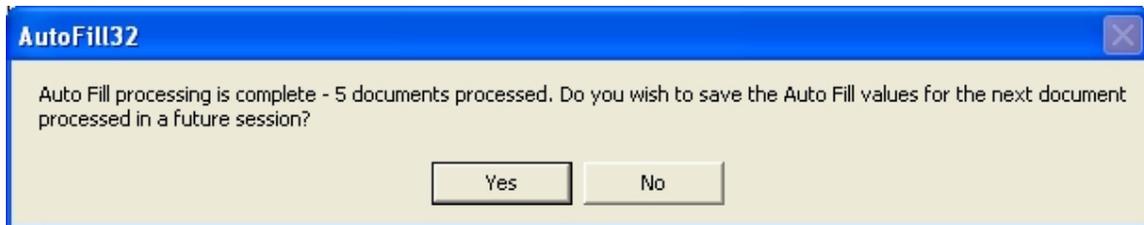
After processing a basket, you should search for the documents to verify that the data was correctly posted.

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 **<u>Set Basket Status to</u>** 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.