Import / Export

Addendum to halFILE for Windows™
Document Storage & Retrieval

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Systems Corporation

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doc # hfw0021_3

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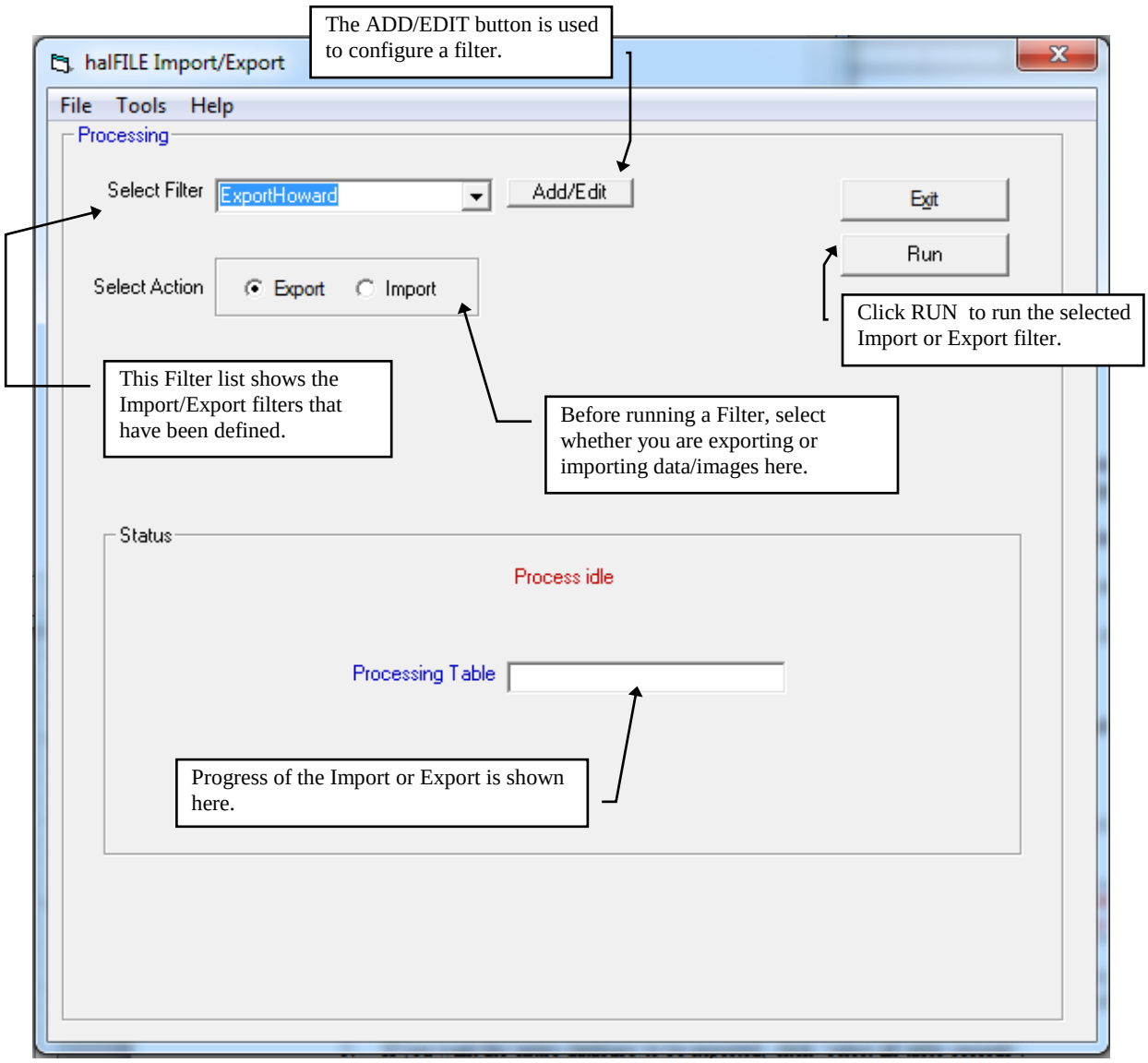
Overview

halFILE includes an 'Import/Export' utility that can be used to export your data and images from on halFILE database and import that data and image set into another halFILE database or third party database. The utility is called EXPORT32.EXE and can be found in the halFILE program folder.

With this utility, you can:

1. Export halFILE image database information to other programs or applications. A comma-delimited file is a common format for the transfer of data and is used by most database or file-oriented applications.
2. Export halFILE image database information as a back up to prevent loss of data
3. Export database information and images from one halFILE database and import the database information and images into another halFILE database having the same database structure.
4. Import information from an external database into a halFILE database, given that the source files conform to the expected format.
5. Configure filters that handle various import/export functions.

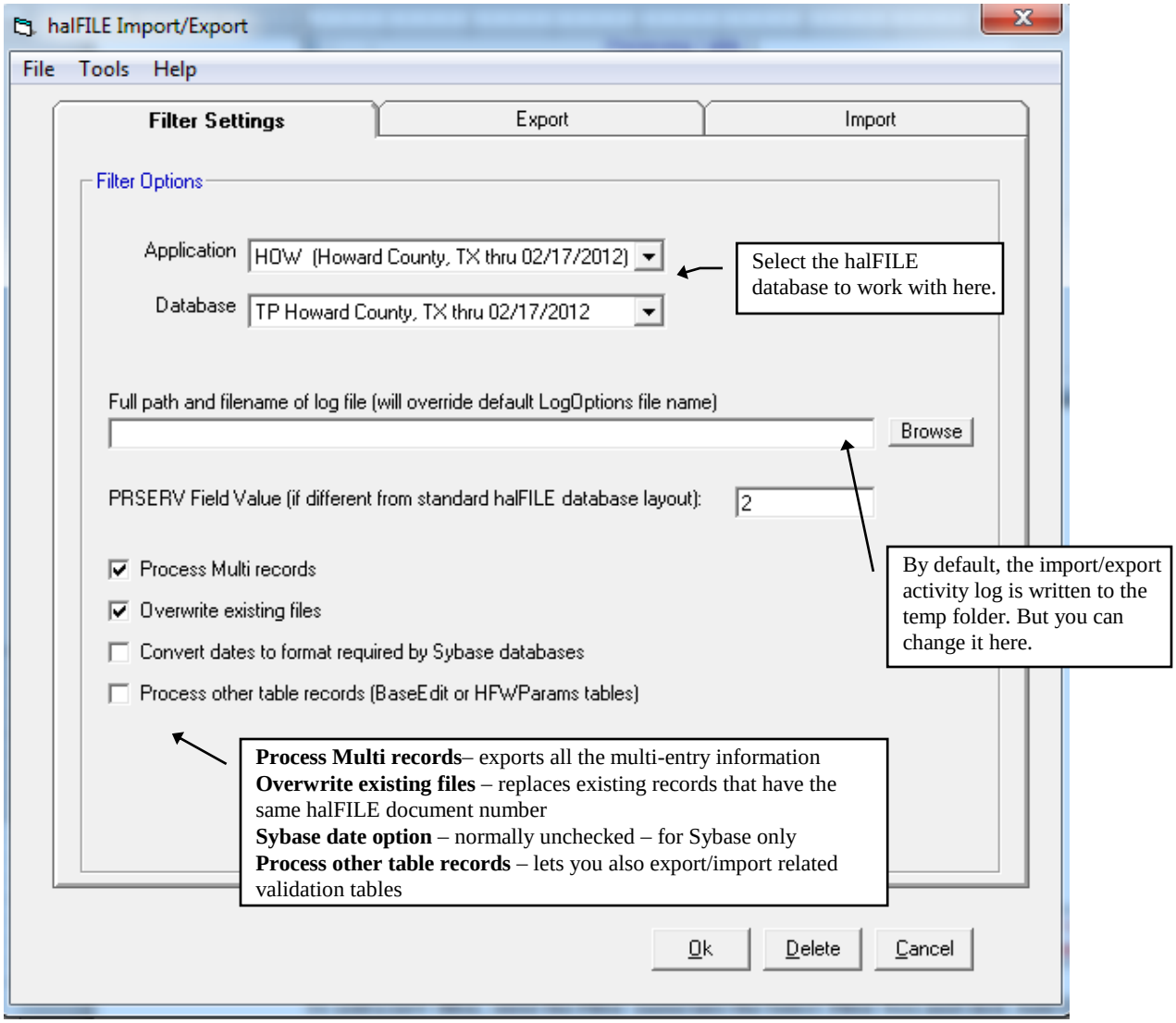


Configuring an Import/Export Filter

The following describes hwo Import/Export filters are defined.

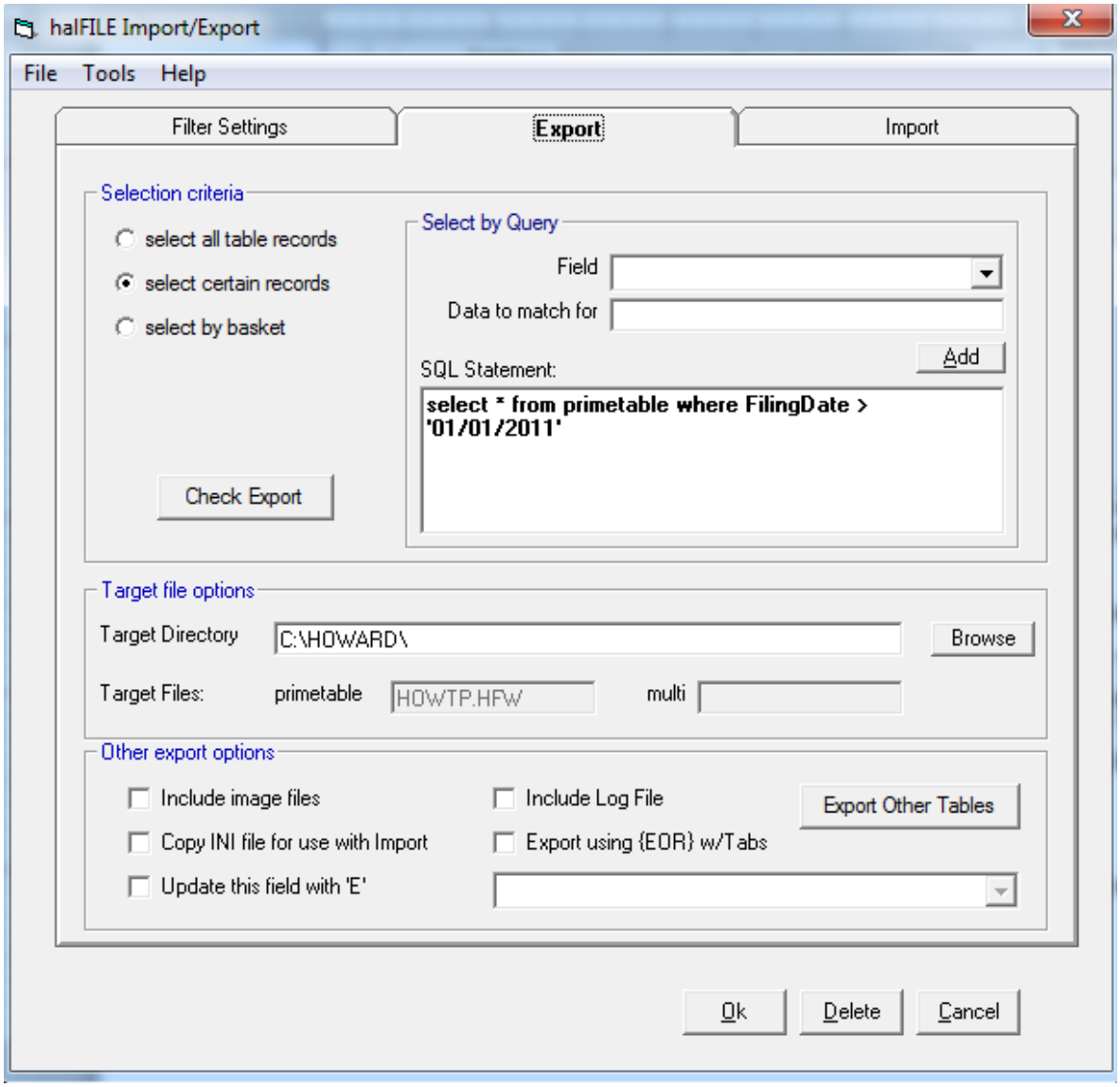
Filter settings are saved to c:\windows\impexp.ini and therefore are local to a particular computer. To move the settings to a new computer, you can copy this file to the c:\windows folder on the new computer.

To add a new filter, enter the Filter name into the Select Filter box and click Add/Edit. This displays the following screen. The Filter Settings tab defines the halFILE database to Export from or Import into. The Export tab defines export settings while the Import tab defines import settings.



Setting up an Export Filter

The Export tab on the filter set up screen is used to define the export features. A sample of this tab is shown below. The Selection criteria frame defines what records are select. You can select all records, select certain records based on a SQL Query Statement like the one shown, or you can select all documents in a selected basket. The Select by Query Field and Data to match for boxes are designed to help you build your SQL Query Statements. The Check Export button provides a count of how many records will be exported.



The Target Directory defines where the exported files are placed. In this folder, when images are exported, you will find subfolders that contain the images plus .HFW files containing the exported data and a .SPC file defining the data layout.

At the bottom are parameters to define other options including:

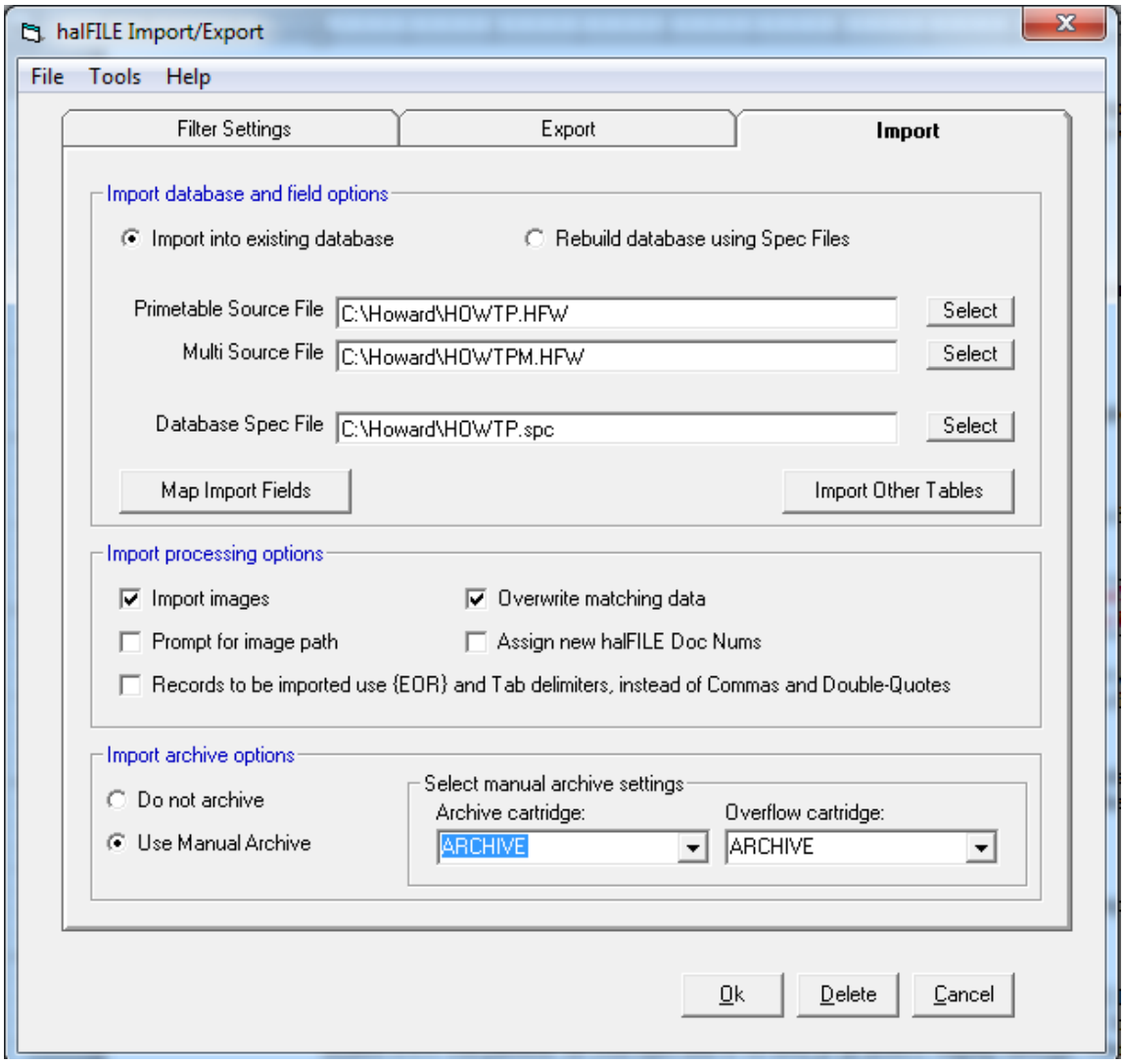
1. Include image files – tells the system whether or not images are exported.
2. Include Lot File – exports the log file.
3. Copy INI for use with import – copies the IMPEXP.INI file which contain import/export parameters.
4. Export using {EOR} w/Tabs – by default, the export files are in comma-delimited format. If this box is checked, however, the export files are tab delimited and the end of record marker is {EOR}.
5. Export Other tabes – this button shows a screen where you can select which auxiliary tables to include.
6. Update this field with ‘E’ – this feature is used to mark records which have been exported. For example, if you include an Export_Flag field in your database, you can auto fill this field with a “N” for Not Exported whenever a new record is added or an existing record is updated. Then, you can configure the SQL Statement to export all records where Export_Flag = ‘N’. Finally, configure

the Update this field with ‘E’ and pick the Export_Flag from the field drop down list to the right and after exporting, the Export_Flag will be set to ‘E’ for all records that were exported, so they will not exported in the future.

Setting Up and Import Filter

The Import tab on the filter set up screen is used to define the import features. A sample of this tab is shown below. The Primetable Source File and Multi Source File are typically the .HFW files that we exported by an export filter. The Database Spec File is the .SPC file that was created by the export process and contains the fields layout. Typically, the Import into existing database option is selected to import into an existing halFILE database. However, the Rebuild database using Spec files is used to create a new halFILE database having the same structure as the source halFILE database.

The Map Import Fields is used if you only want selected fields to be posted or if the source halFILE database is structured differently than the target halFILE database. The Import Other Tables is used to define how the auxiliary tables are to be imported.



At the lower part of the Import set up screen, the Import processing options frame includes the following options:

1. Import images – check this if images are to be imported.
2. Overwrite matching data – check this if the data is overwritten when a matching halFILE document number is found in the target database.
3. Prompt for image path – this will prompt the user to select the path where the images are located.
4. Assign new halFILE Doc Nums – this assigns a new halFILE document number as the doc uments are imported.
5. Records to be imported use {EOR}… - this option is checked if the related option on the Export tab is checked when exporting from halFILE. Otherwise, leave unchecked to use the default comma-delimited format.

The Import archive options frame define how images are handled. If "Do not archive" is selected, then choose a basket to import to and the basket status to assign to imported documents. You should use the "Do not archive" option if you want to perform additional indexing or verification to the imported documents. If "Use Manual Archive" is selected then select the archive cartridge where images are saved to.

Running an Export

Once an export filter has been defined you can run an export as follows:

1. Run Export32.exe found in the halFILE program folder.
2. Select the filter for the export.
3. In the Select Action fame, pick the Export option.
4. Click RUN to start the export process.

Running an Import

Once an import filter has been defined and you have a set of files to import in the configured file location, you can run an import as follows:

1. Run Export32.exe found in the halFILE program folder.
2. Select the filter for the import.
3. In the Select Action fame, pick the Import option.
4. Click RUN to start the import process.

Running Import/Export with Command Line Switch

The command line for running an automated Import or Export is:

<halfile path>\Export32.exe <Option>;<Filter>

where >Option> is E for Export and I for Import
and <Filter> is the name of the filter to use