

Marked Document E-mail Feature

Addendum to halFILE™ Document Manager

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Marked Document E-mail feature

halFILE and e.halFILE include a feature where marked documents may be e-mailed from the hit list screen. This feature really includes two separate components: (a) e-mailing information for any marked document and (b) e-mailing information on documents that have missing images. The e-mails for missing images is called **scan-on-demand** because its most common use is to notify a scan operator that a document has no images and that you need to have the images scanned.

The following describes the set up and operation of this features in two sections: one for halFILE and a second for e.halFILE.

Marked Document E-mail feature in halFILE Search

Overview

1. Missing documents are identified as those documents having the database cartridge and basket fields blank.
2. When a search is performed and this feature is set up, missing documents are identified on the search hit list with an “X” in column 1. The system handles these missing document records with other marks in this column including “R” for reference documents and “>>” for marked documents
3. If you right click on the grid and select “Toggle Missing” it will toggle the mark (“>>”) for missing (“X”) documents.
4. Once documents are marked, you can select the List Options button at the bottom of the hit list to view the menu to work with marked items. The “Send note for marked docs” button will create a body based on hfglobal.ini settings and load the designated mail program. The “Send note for marked missing image docs” button will create a body based on hfglobal.ini settings and load the mail program.
5. Behind the Report button on the hit list, there is a check box that reads “Report checked items only.” When this is checked, reports will only include those documents checked on the hit list.

Scan-on-demand Set up

The Scan-on-demand feature (for missing image documents) is set up using the Tools-Options menu of the halFILE Search module (**Scan-on-demand e-mail** tab). These settings are saved to the [aaaHFWdd] section of HFGLOBAL.INI (where aaa is the application id and dd is the database id).

Mark hit list documents with no images: check this box to turn on the feature for identifying documents that have missing images with an “X”.

List of baskets identified as no image baskets: this option helps the system identify documents as having no image. If a document was indexed using a basket in this list, then it is identified as missing images.

E-mail address of scan on demand operator: identifies the e-mail address to whom the list of marked missing image documents is sent (when using “Send note for marked missing image docs” menu on the right click menu).

Secondary e-mail address to send message to: identifies a second e-mail address to send the scan-on-demand request to.

Email Subject Line: The text to place in the e-mail subject line. Substitutions apply here as well. For example:

Please load these images... from %user%. Thank you.

Email body introduction line: The text to place at the top of the body of the e-mail. Substitutions apply here as well. For example:

The following halFILE Documents for %databasename% are missing images.

Email Body Line: The line to place in the body of the e-mail for each document that is marked. For example:

Document: %prserv% File Number: %3% Recorded Date: %4% View at:
<http://domain.com/scripts/hflook.exe?ABC;TP;%user%;summary;2;%prserv%;EXACT>

The system makes substitutions for items bound by %% and place the line in the body of the e-mail. The above example writes a link in the e-mail for retrieving the document via e.halFILE.

General E-mail Set up

The document information e-mail feature is set up using the Tools-Options menu of the halFILE Search module (**Doc info e-mail** tab). These settings are saved to the [aaaHFWdd] section of HFGLOBAL.INI (where aaa is the application id and dd is the database id).

Default e-mail address to send note to: identifies the e-mail address to whom the list of marked documents is sent (when using “Send note for marked docs” on the right click menu).

Secondary e-mail address to send note to: identifies a second e-mail address to send the note to.

E-mail subject line: The text to place in the e-mail subject line. Substitutions apply here as well. For example:

Please load these images... from %user%. Thank you.

E-mail body introduction line: The text to place at the top of the body of the e-mail. Substitutions apply here as well. For example:

E-mail body line for each document: The line to place in the body of the e-mail for each document that is marked. For example:

Document: %prserv% File Number: %3% Recorded Date: %4% View at:
http://domain.com/scripts/hflook.exe?ABC;TP;%user%;summary;2;%prserv%;EXACT

The system make substitutions for items bound by %% and place the line in the body of the e-mail. The above example writes a link in the e-mail for retrieving the document via e.halFILE.

Substitutions

%user% - user id

%database name% - database name

%prserv% - halFILE document number

%field number% - data from the document where “field number” is the number of the field to substitute (%1% would substitute the 1st user-defined field)

Marked Document E-mail feature in e.halFILE

Overview

1. Missing documents are identified as those documents having the database cartridge and basket fields blank.
2. When a search is performed and this feature is set up, missing documents are identified on the search hit list with a “no” in the “Images?” column.
3. A box is placed at the top of this column for toggling the check mark for these items. If you check this box, the check mark is toggle for all the documents with no images.
4. Once documents are marked, you can use the E-mail Checked button at the bottom of the hit list to send e-mails of marked documents. If you check the **Check here then click 'E-mail Checked' to send to Scan On Demand operator (overrides above e-mail addresses)** and click the E-mail Checked button, then marked images are automatically sent to the scan on demand operator designated in halweb.ini. If you leave this box unchecked, you can fill in “to:” and “cc” boxes to designate to whom the e-mail should be sent.

HALWEB.INI Settings

The following keys can be defined in the [aaaHFWdd] section of HFGLOBAL.INI (where aaa is the application id and dd is the database id).

Scan-on-Demand Set up

ShowMissingImages: set tot TRUE to turn on feature for identifying documents that have missing images with an “X”

ShowMissingImagesEmail: identifies the e-mail address to use when delivering the list of marked missing image documents using the “Send note for marked missing image docs” button on the List Options screen.

ShowMissingImagesCC: identifies a second e-mail address to send to.

ShowMissingImagesEmailLine: The line to place in the body of the e-mail for each document that is marked. For example:

```
Document: %prserv% File Number: %3% Recorded Date: %4% View at:  
http://domain.com/scripts/hflook.exe?ABC;TP;%user%;summary;2;%prserv%;EXACT
```

The system make substitutions for items bound by %% and place the line in the body of the e-mail. The above example writes a link in the e-mail for retrieving the document via e.halFILE.

ShowMissingImagesEmailSubject: The text to place in the e-mail subject line. Substitutions apply here as well. For example:

```
Please load these images... from %user%. Thank you.
```

ShowMissingImagesEmailStart: The text to place at the top of the body of the e-mail. Substitutions apply here as well. For example:

The following halFILE Documents for %databasename% are missing images. The Order Number is %ordernumber%.<P><P>%usermsg%<P>"

General Document E-mail Setup

ImagesEmailLine: The line to place in the body of the e-mail for each document that is marked. For example:

Document: %prserv% File Number: %3% Recorded Date: %4% View at:
<http://domain.com/scripts/hflook.exe?ABC;TP;%user%;summary;2;%prserv%;EXACT>

The system make substitutions for items bound by %% and place the line in the body of the e-mail. The above example writes a link in the e-mail for retrieving the document via e.halFILE.

ImagesEmailSubject: The text to place in the e-mail subject line. Substitutions apply here as well. For example:

Please load these images... from %user%. Thank you.

ImagesEmailStart: The text to place at the top of the body of the e-mail. Substitutions apply here as well. For example:

Substitutions

%user% - user id

%database name% - database name

%prserv% - halFILE document number

%field number% - data from the document where "field number" is the number of the field to substitute (%1% would substitute the 1st user-defined field)

%OrderNumber% - available if the Starter System is enabled and this is a starter search

%usermsg% - places the text the user enters into E-mail message box.