

Title Plant Applications

Addendum to halFILE for Windows? Document Storage & Retrieval

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Systems Corporation

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Overview

halFile? Document Manager, includes several features specific to Title Plant Applications. This document describes those features and how they can be implemented. It is the intent of hal Systems Corporation to continue to implement features that support the Title Industry. As new features become available, this document will be updated.

Title Plant features that have been incorporated into halFILE include:

1. Base Edits. This feature is used to facilitate the data entry of legal descriptions into the Title Plant system. The types of legal descriptions supported by the system include:
 - a. Subdivision, Block, Lot, Section and Arb.
 - b. Township, Range, Section, Quarter, Qtr/Qtr and Arb.
 - c. Abstract, Tract, ARB #
2. Integration with AIM for Windows Closing Package. This feature extracts and posts selected information for the AIM for Windows Closing package into the plant database.
3. Integration with First Data's Data Close Package.
4. Integration with First Data's TitleTrac Package.
5. Integration with SoftPro ProForm.
6. Integration with Ramquest Complete Closing System.
7. Plant Certification Date feature to restrict title searches through the date for which the plant is certified.
8. A Pending Order System to identify documents filed after an initial Title Search was performed.
9. A Prior Reference feature where the system will search for prior references for documents found in a search.

Base Edits

The Base Edit feature for Title Plant imaging applications is provided by halFILE and a table maintenance program called BASEEDIT32.EXE. BASEEDIT32.EXE should be installed in the same directory as HFW20.EXE in order for this feature to work correctly. BASEEDIT32.EXE maintains a table of Subdivisions, Townships, and/or Abstracts in order to provide validation to halFILE when keying a legal description. You can access this program from halFILE by selecting the halFILE Administrator, then File Tables, then double-clicking on of the following tables:

1. TitleSubdivision
2. TitleTownship
3. TitleAbstract

Subdivision Records

Image Database Set Up

The Subdivision Data Entry provides for the data entry of Subdivision, Block, Lot and Section. Entries are validated in a table called ***TitleSubdivision***. When creating the image database, the subdivision base edit feature is enabled by setting up a multi-entry text field that is validated in a table called ***TitleSubdivision***.

Subdivision Table Setup

Using the Base Edit Table maintenance program, a subdivision record is set up in the TitleSubdivision table. This record contains the Subdivision code, the Subdivision name, a list of valid blocks and lots, and a detail level option describing what information will be keyed for this subdivision. The data entered for each of these fields is described below:

Subdivision Code – this is a unique code for the subdivision. This code will be keyed by the data entry person when indexing an instrument.

Subdivision Description – this is the full name of the subdivision.

Blocks and Lots – these are the valid blocks and lots for a subdivision. If you leave this blank, then any Block or Lot is valid. The blocks and lots can contain ranges or a series of numbers. For instance, if a Subdivision contained Lots 1 through 10 and Lot 15 for Blocks 5, the list would be entered as follows:

Blocks: 5

Lots: 1-10,15

To include Lots A, B, and C for Blocks 1-3 you would enter:

Blocks: 1-3

Lot: A

Blocks: 1-3

Lot: B

Blocks: 1-3

Lot: C

Note: On one Block and Lot entry, you cannot enter a Block range AND a Lot range.

Detail Level Option: This defines the level of detail that will be entered. Options are Block/Lot, Block/Lot/Section where sections are validated as 1-36, or Block/Lot/Arb where a arbitrary number is assigned to the property.

Arbs: If the Arb detail level option is selected, then a box to enter the valid Arbs for the Subdivision/Block/Lot is provided. You can enter valid Arbs in the same fashion you enter Lots; as a range (3-6) or as a list (3;4;7) or as a combination (1-3;5;8).

Subdivision Index

The Subdivision Index provides a Base Edit form for entering Subdivisions. This form allows the user to enter a range of lots or a range of blocks in order to speed up the time it takes to index a series of lots and blocks for a single document. The subdivision base edit form is shown below.

The Subdivision Code field is validated against the TitleSubdivision table described previously. As blocks and lots are entered, the system validates them against the allowed blocks and lots for that subdivision. The section field is displayed only if the Detail Level option indicates that the section should be keyed. There is no validation on section.

The process of entering data is as follows:

1. When you get to the Subdivision field on the index form, press F2 or click the question mark. This brings up the Base Edit form.
2. Enter the Subdivision Code, press <tab>. If you do not know the Subdivision code, a question mark help icon is provided to display a list of valid codes.
3. Enter the Block, press <tab>.
4. Enter the Lot, press <tab>.
5. If the detail level indicates, enter the section, press <tab>.
6. If the detail level indicates, enter the Arb, press <tab>.
7. The <Add> button should be highlighted. Press <enter>. The Subdivision, Block, Lot and Section will be posted into list boxes.
8. Continue with the next Subdivision, Block, Lot (and Section or Arb). If there are no more entries for the document, click the <Index> button. You will see the Subdivision, Block, Lot and Section entries fill in the Subdivision box with a semi-colon separating each field.

Subdivision / Lot / Block

? Subdivision: Blocks: Lots:

Subdivision: Block: Lot: Section / Arb:

Subdivision Index Examples

The following examples show what happens when the base edit form is filled out.

User enters:

Subdivision TCC, Block 3, Lot 5

System generates:

TCC;3;5

Subdivision TCC, Block 4, Lot 1-6

TCC;4;1	TCC;4;4
TCC;4;2	TCC;4;5
TCC;4;3	TCC;4;6

If a mix of blocks and lots was necessary (different lots on different blocks) then the user would enter the ranges on different lines. For instance:

User enters:

Subdivision TCC, Block 4, Lot 1-3

Subdivision TCC, Block 5, Lot 6-9

System generates:

TCC;4;1	TCC;5;6
TCC;4;2	TCC;5;7
TCC;4;3	TCC;5;8
	TCC;5;9

Subdivision Search

The Subdivision Search procedure works much like the Subdivision Index procedure. You use the Subdivision Base Edit form to specify what is to be searched. Enter the Subdivision code, the Block, the Lot, and (if needed) the Section. Click the Add All Levels button to add the entry to the search criteria. Then click the Index button to return to the main search criteria form. Be sure to select a Search Type of exact match when performing Subdivision Searches.

Abstract (survey) Records

Using the Base Edit Table maintenance program, an Abstract record is set up in the TitleAbstract table. This record contains the Abstract/Survey code, the Abstract/Survey Description, and a list of valid tracts and ARBs. The data entered for each of these fields is described below:

Abstract/Survey Code – this is a unique code for the abstract. This code will be keyed by the data entry person when indexing an instrument.

Abstract/Survey Description – this is the full name of the abstract.

Tracts and ARBs – a list of tracts and Arbs that are valid for this Abstract/Survey.

When searching, the user would key in ‘A12;4;5’ for Abstract 12, tract 4, arb 5. To search for all of tract 4, they would key ‘A12;4’ and perform a beginning of field search.

Abstract/Survey Index

The Abstract/Survey Index provides a Base Edit form for entering Abstracts/Surveys. This form allows the user to enter a range of Tracts or a range of Arbs in order to speed up the time it takes to index a series of Tracts and Arbs for a single document. The Abstract/Survey base edit form is shown below.

The Abstract Code field is validated against the TitleAbstract table described previously. As Tracts and Arbs are entered, the system validates them against the allowed Tracts and Arbs for that subdivision.

The process of entering data is as follows:

1. When you get to the Abstract/Survey field on the index form, press F2 or click the question mark. This brings up the Base Edit form.
2. Enter the Abstract Code, press <tab>.
3. Enter the Tract, press <tab>.
4. Enter the Arb, press <tab>.
5. The <Add> button should be highlighted. Press <enter>. The Abstract, Tract and Arb will be posted into list boxes.

6. Continue with the next Abstract, Tract and Arb. If there are no more entries for the document, click the <Index> button. You will see the Abstract, Tract and Arb entries fill in the Abstract/Survey box with a semi-colon separating each field.

The screenshot shows a window titled "Abstract (Survey) / Tract / Arb". At the top left is a help icon (a question mark in a square). Below it are three input fields labeled "Abstract:", "Tracts:", and "Arbs:". Below these fields are four buttons: "Add", "Insert", "Remove", and "Clear". Below the buttons are three larger input areas labeled "Abstract:", "Tract:", and "Arb:". At the bottom of the window are two buttons: "Index" and "Cancel".

Township Records

Image Database Set Up

The Township Data Entry provides for the data entry of Township, Range, Section, Quarter and Quarter/Quarter. Entries are validated in a table called ***TitleTownship***. When creating the image database, the Township base edit feature is enabled by setting up a multi-entry text field that is validated in a table called ***TitleTownship***.

Township Table Setup

Using the Base Edit Table maintenance program, a township record is set up in the TitleTownship table. This record contains the Township, the Range, a description of that Township/Range, a remarks field and a detail level option describing what information will be keyed for this township/range. The data entered for each of these fields is described below:

Township – the Township in the standard format for Land Measurement, i.e., 1N for Township 1 North or 2S for Township 2 South.

Range – the Range value in the standard format for Land Measurement, i.e., 1E for Range 1 East or 3W for Range 3 West.

Remarks – this is any remarks you wish to record about the Township/Range. The system will automatically enter a value when you add a new Township/Range such as ‘Township 1N, Range 2W’. This can be replaced by the user.

Valid Sections – enter the sections that are valid for this township-range quadrant. You can enter a combination of a range of sections and a list of sections in the form 1-25;28;30;32. If this field is left blank then all sections (1-36) are valid.

Detail Level Option: This defines at what level the Township/Range should be entered; whether the Section, Quarter, Quarter/Quarter, Quarter/Quarter/10-acre, Quarter/Quarter/10-acre/2.5-acre, or Arb will be entered.

Sub-map/Arbs: If the Sub-map/Arb option is selected, the valid Sub-map/Arbs are entered using the Edit Sub Map/Arb button.

Township Index

The Township/Range Index provides a Base Edit form for entering Township, Range, Section, Quarter, Quarter/Quarter, and Arb. The Township/Range base edit form is shown below.

The combination of the Township and Range is validated against the TitleTownship table described previously. The Section field must be within the range of 1 to 36. The Quarter and Qtr/Qtr fields, if entered, must be NW, NE, SW or SE. If the Arb option is selected, the Arb entered is validated against the valid Arbs.

The process of entering data is as follows:

1. When you get to the Township/Range field on the index form, press F2 or click the question mark. This brings up the Base Edit form.
2. Enter the Township, press <tab>.
3. Enter the Range, press <tab>.
4. Enter the Section, press <tab>.
5. If required, enter the Quarter and press <tab>.
6. If required, enter the Qtr/Qtr and press <tab>.
7. If required, enter the 10-acre tract and press <tab>.
8. If required, enter the 2.5-acre tract and press <tab>.
9. If required, enter the Arb and press <tab>.
10. The <Add> button should be highlighted. Press <enter>. The Township, Range, Section, Quarter, Qtr/Qtr, 10-acre tract, 2.5-acre tract, and Sub-map/Arb will be posted into list boxes.

11. Continue with the next Township, Range, Section... If there are no more entries for the document, click the <Index> button. You will see Township, Range, Section... entries fill in the Township/Range box with a semi-colon separating each field.

The screenshot shows a window titled "Townships" with a blue title bar. Below the title bar is a tab labeled "Township / Section / Range". The main area contains several input fields and buttons:

- Township:** A text box containing "10N".
- Description:** A text box containing "Township 10N, Range 3E".
- Range:** A text box containing "3E".
- Section:** An empty text box.
- Quarter:** An empty text box.
- Quarter / Quarter:** An empty text box.
- 10 acre tract:** A text box with a blue "activate" link.
- 2.5 acre tract:** A text box with a blue "activate" link.
- Multi-select:** A 4x4 grid of squares. The top-left square is selected (contains an 'x'). Buttons around the grid are labeled "NW qtr", "NE qtr", "SW qtr", "SE qtr", and "entire section".
- Buttons:** "Add", "Insert", "Clear", "Remove", "Add All Levels", "Map", "Index", and "Cancel".
- Index Information:** A large empty rectangular area on the right side of the window.

Quarter/Quarter Speed Entry

When a document includes multiple quarter or quarter/quarters, a speed entry grid is provided for fast selection. This grid of the sixteen quarter/quarters within the section will appear on the Township data entry form in the lower right hand corner (as shown above). When you click on a quarter/quarter an 'x' will appear which means it is selected. If you click on a quarter/quarter that has an 'x', then the 'x' will disappear which means it is not selected. Buttons are provided to select the entire section, or an entire quarter (NW qtr, NE qtr, SW qtr, SE qtr). If, when you press one of these buttons, the entire section or quarter is already selected, then it will be de-selected. Once you have 'x' for all the quarter/quarters that should be included for the property, then click the Add button to include it in the index.

2.5-Acre Speed Entry

When a document includes multiple 2.5-acre tracts, a speed entry grid is provided for fast selection. This grid will appear will appear when you click the **Map** button shown on the form. The form works similar to the Quarter/Quarter Speed Entry form.

Township/Range Search

When searching Township/Range, the criteria forms look like the data entry forms used in Index, except an “add all levels” button is added. Here is how this button is used:

1. The user wants to search for township 21N, range 12E, Section 36, Quarter NW and Qtr/Qtr NE.
2. In the Base Edit data entry form, the user enters the above property and clicks the “Add all levels” button. This adds each higher level to the search criteria.
3. Click the Index button and set the search type to exact match.
4. When the search is performed, the program will search for anything that exactly matches:
 - ? township 21N, range 12E, Section 36, Quarter NW and Qtr/Qtr NE
 - ? township 21N, range 12E, Section 36, Quarter NW
 - ? township 21N, range 12E, Section 36

This way, if a document was indexed to an entire Section or to an entire Quarter, it will be picked up by the search.

Support for AIM for Windows

AIM for Windows is a closing package used by Title Companies. halFILE includes some features that allow data to be extracted from the AIM for Windows database and posted to halFILE index fields. This section describes how this feature works and how to set up the image database to enable this feature.

AIM Integration

The integration of AIM for Windows and halFILE is meant to reduce the amount of data entry required when indexing a document in halFILE. By setting up a link to the AIM for Windows database, the user keys the Closing Number for the document, and other index fields are extracted from the AIM for Windows database and posted into the image database. For instance, you can key the Closing Number for a document and the Buyer and Seller names, the Property Address, the Projected Closing Date and other AIM fields will automatically appear.

Then, to post changes that may have been made to order in AIM, a posting program is provided that reads modified AIM orders, and posts changes to the halFILE image database.

Defining the halFILE Image Database

Note: A database specification named AIM01.SPC is located in your halFILE program directory (or from hal Technical Support). This can be loaded with File_Database, Add New, using the File_Open Specification menu.

The halFILE image database is set up in the standard way using the menu selection File_Database (see your halFILE information for more information on how to setting up a new database). To enable the AIM for Windows integration, certain field names must be defined. Of these fields, only **File_Number** and **AIM_Order_Number** fields are required, since these establish the primary link between halFILE and AIM for Windows. Other fields that you can extract from AIM and how they should be defined are illustrated in the following table.

*Note: Since the user who indexes documents typically does not know the AIM Order Number, the system is set up so the File Number is keyed and this triggers a look up to retrieve the AIM Order Number. So, a field named File_Number is set up above the AIM_Order_Number field in your database. Refer to the **Setting up an AIM Order Number Lookup** section below for more information.*

Field Name	Field Type	Length	Description
File_Number	Text	15	Unique file number assigned to each order
AIM_Order_Number	Int	4	The Aim Closing Number. This field is required for AIM integration with halFILE
BranchId	Smallint	2	Branch ID of office this order belongs to
FileStatus	Text	1	Status code for the file/order
AssociatedFileNum	Text	15	Number associated with another file number
PropType	Int	4	Property type associated with description
TransType	Int	4	Transaction type associated with description
TitleUnitNum	Smallint	2	Unit number associated w/ unit name
StateCode	Text	2	State Code
StateName	Text	30	State Name
CountyCode	Smallint	2	County Code
CountyName	Text	25	County Name
SalesPrice	Int	4	Sales price
NeedByDate	Date/Time	8	Need by date
OrderDateTime	Date/Time	8	Date and time order is entered
ModifyDateTime	Date/Time	8	Date and time order last modified
AddByEmpUserID	Int	4	User ID adding the order
ModifiedByEmpUserID	Int	4	User ID modifying the order
DocPrepBuyer	Memo	-	Buyer names and descriptions
DocPrepSeller	Memo	-	Seller names and descriptions
DocPrepLglDesc	Memo	-	Doc prep legal description
AdditionalInstruction	Memo	-	Additional instructions for the order
TrackedTo	Int	4	key to the location that the order is tracked to
EscrowUnit	Smallint	2	Escrow unit
ProjectedClosingDate	Date/Time	8	Projected date of closing
EarnestMoney	Int	4	Earnest money
AIM_Buyer_Name	ME-Text	60	Buyer names*
AIM_Seller_Name	ME-Text	60	Seller names*
AIM_Lender_Name	ME-Text	60	Lender names*
AIM_Prop_Address	ME-Text	60	Property Address**

* The buyer, seller and lender names are built from AIM Name and Address table and include Last Name, First Name and Middle Name for individuals and Company Name for Companies.

** The Property Address is built from the AIM Property table and includes one line for Street Number and Name and a second line for City, State and Zip Code.

Connecting to the AIM for Windows Database

To connect to the AIM for Windows database, you first need to set up an ODBC Data Source using the ODBC Administrator located either in the halFILE program group or the Windows

Control Panel. Once the ODBC Data Source Name is properly configured, you then should edit or create a HFGLOBAL.INI file, located in your halFILE program directory. It contains the parameters needed to connect to the AIM for Windows database. The sample below shows what these parameters are. The DSN tag is the Data Source Name. DBQ is the path to the database if AIM for Windows is using an Microsoft Database. UID is the User ID and PWD is the Password used to access the database.

Example for Microsoft Access:

```
[AIM]
DSN=AIM4WIN
DBQ=f:\AIM4WIN\aim4win.mdb
UID=ReportUser
PWD=
```

Example for Microsoft SQL Server:

```
[AIM]
DSN=FileDSN=e:\halfile\dsn\aim4win32.dsn
DBQ=aim4win
UID=sa
PWD=password
```

Multiple AIM for Windows databases

To provide lookups into more than one AIM for Windows database, you add additional sections into the HFGLOBAL.INI file. The second AIM database is defined in an [AIM1] section, the third is defined in an [AIM2] section, and so on. During indexing, the system performs the lookup into the first AIM database (as defined in the [AIM] section) and, if the key is not found, it performs the lookup in the second AIM database (as defined in the [AIM1] section). This continues until the key is found or the next AIM section is not found. Below is an example of a second AIM for Windows set up in HFGLOBAL.INI.

```
[AIM1]
DSN=AIM4WIN
DBQ=F:\AIM4WIN2\AIM4WIN.MDB
UID=reportuser
PWD=
```

The pop-up help feature, showing AIM database entries in a pick list, also supports multiple AIM for Windows databases. If there is more than one section in HFGLOBAL.INI, then a menu is displayed asking the user which database to show the entries from. If there is only one AIM section in HFGLOBAL.INI, this menu is suppressed.

Re-Posting Program

As mentioned earlier, a program is provided to post changes made to AIM for Windows that affect documents that were indexed in the image database. Use the following steps to run this procedure:

1. Run the program AIMPOST.EXE from your halFILE program directory.
2. Select the Target image database from the list shown. The list shows the halFILE Application ID, Database ID and Database Description.
3. The Source Database is automatically selected by reading the AIM database parameters from HFGLOBAL.INI (described above)
4. Select the re-post option to either post all records or records since a specified date.

Note: If you run the all option, it may take a long time to complete, depending on the number of records in the AIM database. This step reads each record in the AIM database, looks it up in the halFILE image database and, if changes were made, it re-posts the record.

5. Click the Repost AIM Data button to begin the process. A record count will show progress and number of records posted.

Setting up an AIM Order Number Lookup

To set up a Lookup inside of halFILE where the user keys the File_Number field and the AIM_Order_Number field is automatically posted, perform the following:

1. Select the halFILE database that is associated with AIM as the default database at the top of the halfile screen.
2. Go into File | Databases | Lookups.
3. From the drop 'Select Lookup Number', select Lookup Number 1.
4. If the AIM database is Access, enter the Lookup Database Path as the name of the database. Leave this field blank if the AIM database is in SQL Server.
5. If the AIM database is Access, enter 'AIM4WIN.mdb' as the Lookup Database name. For SQL Server, enter 'AIM4WIN'.
6. Drop down the Lookup Connect String box. If the AIM Database is in Access, select MS Access. If the AIM Database is in SQL Server, select ODBC that gives you the basic format you need. Edit this format so it is all filled in. For example:
ODBC;FILEDSN=E:\halfile\dsn\AIM4WIN32.dsn;DBQ=AIM4WIN;UID=sa;PWD=sa
7. When you tab out of this field the Lookup Table Name should be populated. Select the tblOrder table. This will populate the AIM Fields list at the bottom as well as the match field.
8. Select the File_Number field in the Match field in halFILE box.
9. Select the Filenum field in the Match field in Lookup box.
10. Add the AIM_Order_Number field from the halFILE Fields to the Post To fields.
11. Add the OrderKey from the Lookup fields to the Post From fields.
12. Save that and close out.

If the lookup feature is correctly set up, when a document is indexed, the operator enters the File_Number field, presses TAB which should fill in the AIM_Order_Number. Then TAB is press again to fill in all the AIM fields.

Support for VAX AIM

VAX AIM is a closing package that runs on VAX Operating Systems. halFILE can integrate with this product in the following fashion:

1. A program, supplied by Stewart Title, exports the VAX information to a fixed-length, ASCII file.
2. A program, supplied by hal Systems and called VAXIMP, imports the data into a select halFILE Database. We will call this the halFILE VAX AIM database.
3. The halFILE Lookup feature is used to tie the production halFILE database that contains images to the halFILE VAX AIM database that contains the VAX AIM information. The user enters the file number and the program extracts selected data elements from the halFILE VAX AIM database and posts the data to the halFILE production database.

For more information on this feature, contact hal Technical Support.

Support for First Data Data Close

Data Close is a closing package written by First Data Corporation and used by Title Companies. halFILE includes a program to post Data Close information to a Microsoft Access database and features that allow data to be extracted from that database and posted to halFILE index fields. This section describes how this feature works and how to set up the image database to enable this feature.

Defining the halFILE Image Database for Data Close documents

The halFILE image database is set up in the standard way using the menu selection File_Database (see your halFILE documentation for more information on how to setting up a new database). To enable the Data Close integration, certain field names must be defined. Of these fields, only a Closing_File_Number is required, since it is the primary link between halFILE and the Data Close database. Other fields that you can extract from Data Close and how they should be defined are illustrated in the following table. Note that, unlike AIM for Windows integration described above, Field Names can be changed here.

Field Name	Field Type	Length	Description
Closing_File_Number	Text	22	The Aim Closing Number. This field is required for Data Close integration with halFILE.
Buyers	M-E Text	30	Multi-entry field into which 4 buyers from Data Close may be posted.
Sellers	M-E Text	30	Multi-entry field into which 4 sellers from Data Close may be posted.
Address	Text	30	Property Street Address
City	Text	15	City
StateCode	Text	2	State Code
ZipCode	Text	9	Zip Code
Legal	Text	30	Brief Legal Description
OrderDate	Date/Time	8	Date of order or last modified date

Posting Data Close information into an Access database

Data Close provides a feature where, when a order is added or modified, a transaction is written to a log file named \FDS\DATA\IMGDATA.TXT. This is the file to be posted to the Access Database. The program that posts the data is FDSOA.EXE and should be located in your halFILE program directory. This program first reformats IMGDATA.TXT using the reformatting program \FDS\SW\SWREFRMT.EXE. It then posts the data to \FDS\DATA\IMGDATA.MDB. After the posting, the IMGDATA.TXT is removed and Data Close will create a new file when the next Closing transaction occurs.

To set up halFILE to extract data from \FDS\DATA\IMGDATA.MDB, use menu selection File_Database. Select the database you want to work with and press the Lookups button. Then fill out the screen as follows:

1. Select the Lookup number to define using the upper left drop down list box (normally you would select Lookup Number 1).
2. Press the Select button beside Lookup Database Path and select the \FDS\DATA\IMGDATA.MDB. This will fill in the Lookup Database Path and Lookup Database Name boxes.
3. Select the ODBC form of the connect string and enter it in the form “ODBC; FileDSN=<path and filename to a 32-bit file data source>;UID=;PWD=;”.
4. Select ‘imgdata’ as the Lookup Table Name.
5. Select ‘File’ in the Match Field in Lookup box.
6. In the ‘Match Field in halfile’ box, select the field that corresponds to the Data Close File Number.
7. Specify the list of cross-reference fields in the ‘Post To Fields’ and ‘Post From Fields’ boxes at the bottom of the Window. To do this, select the field that you want to post from Data Close in the right-hand Lookup Fields list and press the Post From button. Then find the corresponding field in the image database in the left-hand ‘halFile field’ list and press the ‘Post To’ button. It is important that corresponding fields be on the same line in the ‘Post To Fields’ and the ‘Post From Fields’ boxes. Continue selecting fields in this manner until you have selected all the desired fields to post from Data Close.

Note: There are four buyers in the Data Close IMGDATA.MDB database. To post all four of these to a multi-entry image database field, select Buyer1 from the Data Close fields, then select the multi-entry Buyer field from the image database. Then select Buyer2 from Data Close and the same multi-entry Buyer field from the image database. Do the same for Buyer3 and Buyer4. Sellers work the same way.

Setting up halfile.ini entries for Closing File Number Pick List

By adding entries into halfile.ini, you can provide a pop-up pick list to select the Data Close file number when indexing a document in halFILE. You must make the following entries to halfile.ini, normally located in C:\WINDOWS, on each work station.

```
[FDSHFWCL]           (FDS is the application id, CL is the document type)
ExternalDatabaseName=imgdata.mdb
ExternalDatabasePath=f:\fds\data\      (be sure to use the correct drive letter)
LookupTable=imgdata
LookupString=0;20;1;30
LookupTitleBar=File Numbers
LookupField=8
```

DataClose Data Fields

The table below shows the data structure for the table 'imgdata' in the database 'imgdata.mdb'. You can use the Look up feature to select any of these fields and post into your image database.

Field Name	Length	Type
File	22	Text
Buyer1	30	Text
Buyer2	30	Text
Buyer3	30	Text
Buyer4	30	Text
Seller1	30	Text
Seller2	30	Text
Seller3	30	Text
Seller4	30	Text
Address	30	Text
City	15	Text
State	2	Text
Zip	9	Text
County	25	Text
Legal	30	Text
Settlement Date	8	Date

Support for First Data TitleTrac

TitleTrac is a closing package written by First Data Corporation and used by Title Companies. halFILE includes a program to post TitleTrac information to a Microsoft Access database in much the same way that DataClose is supported. Refer to the previous section on DataClose for more information.

Posting TitleTrac information into an Access database

TitleTrac provides a feature where, when a order is added or modified, a transaction is written to a log file named \FDS\DATA\IMGDATA.TXT. This is the file to be posted to the Access Database. Like DataClose FDSOA.EXE is the program that posted the information into Access. However, you must add the option 'titletrac' on the command to post the additional TitleTrac data fields. So, the command is: 'FDSOA titletrac'.

TitleTrac Data Fields

The table below shows the data structure for the table 'imgdata' in the database 'imgdata.mdb'. You can use the Look up feature to select any of these fields and post into your image database.

Field Name	Length	Type
File	22	Text
Buyer1	30	Text
Buyer2	30	Text
Buyer3	30	Text
Buyer4	30	Text
Seller1	30	Text
Seller2	30	Text
Seller3	30	Text
Seller4	30	Text
Address	30	Text
City	15	Text
State	2	Text
Zip	9	Text
County	25	Text
Legal	30	Text
Settlement Date	8	Date
Property_Code	4	Text
Transaction_Code	5	Text
Branch_Code	2	Text
Branch_Name	25	Text
County_Code	3	Text
Sales_Price	12	Text

Loan_Amount	12	Text
Lender	30	Text

Support for SoftPro ProForm for Windows

SoftPro's ProForm For Windows is a closing package used by Title Companies. halFILE includes some features that allow data to be extracted from a ProForm file and posted to halFILE index fields. This section describes how this feature works and how to set up the image database to enable this feature.

ProForm Integration

The integration of ProForm and halFILE is meant to reduce the amount of data entry required when indexing a document in halFILE. By setting up a link ProForm files, the user keys the File Number for the document, and other index fields are extracted from the appropriate ProForm file and posted into the image database. For instance, you can key the File Number for a document and the Buyer and Seller names, the Property Address, the Legal Description and other ProForm fields will automatically appear.

Defining the halFILE Image Database

The halFILE image database is set up in the standard way using the menu selection File_Database (see your halFILE documentation for more information on how to set up a new database). Any field which you create in the halFILE database may be linked to a ProForm field name for data extraction.

Proform Field Names

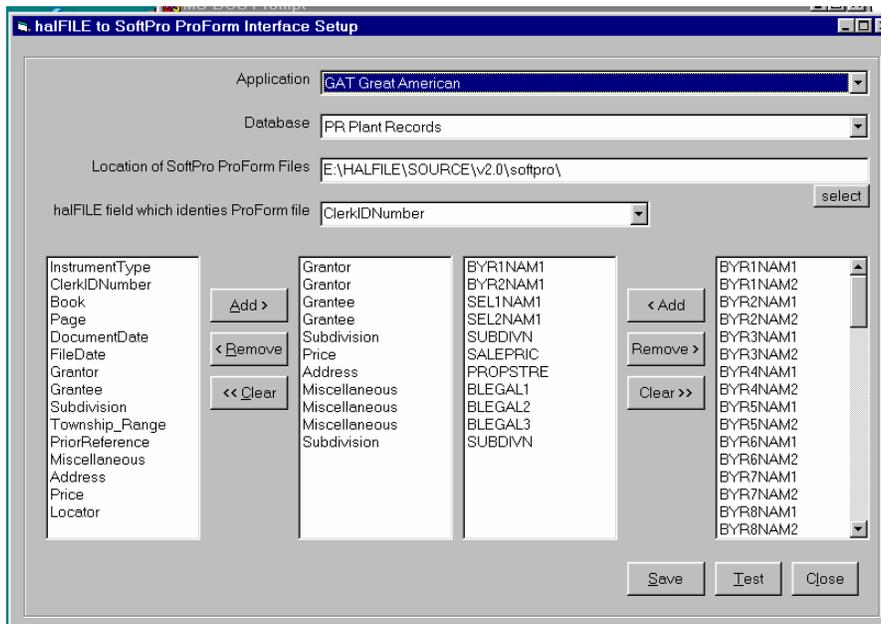
The ProForm field names are set up in hfsopro.ini, located in the halFILE program directory. The field names listed in the [Config] section as Field1 through Fieldn must match the ProForm field names as identified in ProForm for Windows Data Entry Screens and Field Names document from SoftPro. Hal Systems supplies a sample of the hfsopro.ini which contains the most applicable field names. The following shows a sample of the hfsopro.ini [Config] section.

```
[Config]
Field1=BYR1NAM1
Field2=SEL1NAM1
Field3=SEL2NAM1
Field4=LOANAMT
Field5=SALEPRIC
Field6=SETTDATE
Field7=LENNAM1
Field8=LENADR1
```

Connecting to ProForm

To set up the connection between a halFILE database and ProForm for Windows, the program HFSOPRO32.EXE is used. This program creates entries in hfsopro.ini, located in the

halFILE program directory. The following shows a sample screen of a halFILE to ProForm interface set up.



Select the Application and database. This will show you the halFILE database fields in the left-hand box. The available ProForm fields (from the [Config] section of hfsopro.ini) are listed in the right-hand box.

Specify the location of ProForm files. You can use the SELECT button to browse and locate the correct folder.

From the drop down list, select the halFILE field used to identify the ProForm file. So if the halFILE database contains a field called File_Number and you save ProForm files using the File Number, you should select the File_Number field as the halFILE field which identifies the ProForm file. Then, when you enter '12345' as the File_Number, halFILE will try to open and retrieve information from 12345.PFD in the designated ProForm folder.

Add the fields that you want interfaced into the middle two boxes using the ADD buttons. These fields should be in the same order in both boxes. Also, if there is more than one ProForm field that is attached to the same halFILE field (which may often occur because multi-entry halFILE field may contain multiple lines of data), then add the field the appropriate number of times to the halFILE box. For example, if you want to extract BYR1NAM1 and BYR2NAM1 from ProForm and place the names into the Grantor field in halFILE, you would add Grantor twice on the halFILE side.

Click the SAVE button to write the settings to hfsopro.ini.

The TEST button is used to test the settings. When you click this button, you can select a ProForm file and the system will show you the ProForm data extracted from that file.

Note: If the ProForm set up program gets a Windows Protection Fault error, this is usually caused by (1) the ProForm field name was incorrectly entered into hfsopro.ini or (2) the length of the ProForm field is longer than the length of the related halFILE field or is longer than the maximum length of a string field in Windows.

The ProForm Interface in Action

The ProForm Interface occurs when documents are indexed in halFILE. When the specified Key Field is entered in a database that has been set up to extract data from ProForm, the system uses that Key Field data to open a ProForm file in the specified File location, extract the information and post it to the fields on the index screen. The data entry person can then review the fields for correctness and save the record.

For example:

1. The Key Field is the File_Number.
2. The File Location is 'F:\proform.'
3. The halFILE fields being posted are Buyer, Seller and Brief_Legal.
4. BYR1NAM1 and BYR2NAM1 fields are set up to post to Buyer.
5. SEL1NAM1 and SEL1NAM2 fields are set up to post to Seller.
6. BLEGAL1, BLEGAL2 and BLEGAL3 are set up to post to Brief_Legal.

Then:

1. The user goes into index a document.
2. The File Number on the document image is '12345.' The user enters '12345' into the File_Number field.
3. The user press TAB and the system reads the ProForm file 'f:\proform\12345.pfd.' and fills in Buyer, Seller and Brief_Legal fields are filled in with information from the ProForm file.
4. The user reviews the posted data, enters and other data necessary then press CTRL-S to save the document.

If the ProForm file cannot be found a message is displayed which states "unable to find that information in SoftPro." If the key field was correctly entered, this means the ProForm file was (1) not saved to the designated ProForm folder or (2) was saved with a different file name than what was entered into the key field or (3) the extension on the ProForm field is not 'pfd.' To complete the indexing of this document, the information would have to be manually entered.

Support for Ramquest Complete Closing

Ramquest's Complete Closing is a closing package used by Title Companies. halFILE includes some features that allow data to be extracted from the Ramquest system and posted to halFILE index fields. The integration can also check the Ramquest system for Pending Orders as new

Title Plant documents are entered. This section describes how these features work and how to set up the image database to enable these features.

Note: The Ramquest interfaces requires Ramquest's SQL Server version of Complete Closing plus a DLL program file supplied by Ramquest. You can contact Ramquest to get this set up.

Ramquest Lookups

The Ramquest Lookup feature is typically set up on a halFILE database containing documents from Title Closes. To reduce data entry, this feature lets the user key a File Number and look up and extracts Ramquest information and posts it to the halFILE document.

Defining the halFILE Image Database

The halFILE image database is set up in the standard way using the menu selection File_Database (see your halFILE documentation for more information on how to set up a new database). Any field that you create in the halFILE database may be linked to a Ramquest field name for data extraction.

Ramquest Field Names

The Ramquest field names are set up in hfsrq.ini, located in the halFILE program directory. The field names listed in the [Config] section as Field1 through Fieldn must match the Ramquest field. hal Systems supplies a sample of the hfrq.ini which contains a list of all available field names. The following shows a sample of the hfrq.ini [Config] section.

```
[Config]
Field1=GFNo
Field2=Branch
Field3=SellerFormalName
Field4=SellerBusinessName
Field5=SellerName1First
Field6=SellerName1MI
Field7=SellerName1Last
Field8=SellerName1Ext
Field9=SellerName2First
Field10=SellerName2MI
Field11=SellerName2Last
Field12=SellerName2Ext
Field13=SellerName1Full
Field14=SellerName2Full
Field15=SellerName1Reversed
Field16=SellerName2Reversed
Field17=SellerAddress
Field18=SellerCity
Field19=SellerState
Field20=SellerZip
Field21=BuyerFormalName
Field22=BuyerBusinessName
Field23=BuyerName1First
Field24=BuyerName1MI
```

Field25=BuyerName1Last
Field26=BuyerName1Ext
Field27=BuyerName2First
Field28=BuyerName2MI
Field29=BuyerName2Last
Field30=BuyerName2Ext
Field31=BuyerName1Full
Field32=BuyerName2Full
Field33=BuyerName1Reversed
Field34=BuyerName2Reversed
Field35=BuyerAddress
Field36=BuyerCity
Field37=BuyerState
Field38=BuyerZip
Field39=LenderName
Field40=LenderAddress
Field41=LenderCity
Field42=LenderState
Field43=LenderZip
Field44=LoanTypeLong
Field45=LoanType
Field46=PropertyAddress
Field47=PropertyCity
Field48=PropertyState
Field49=PropertyZip
Field50=PropShortLegal
Field51=CountyCode
Field52=CountyName
Field53=CmtPropTypeLong
Field54=PropType
Field55=UnderwriterFullName
Field56=UnderWriterShort
Field57=SalesPrice
Field58=LoanAmount
Field59=SourceOfBusiness
Field60=SubDivCode
Field61=Block
Field62=Lot
Field63=TitleSubdivision

Special Field Names

The field list above includes the following special field names that are not really a part of the Ramquest system. Rather, these field names trigger a halfFILE function to expand the functionality of the lookup feature as describes below.

SellerName1Reversed, SellerName2Reversed, BuyerName1Reversed, BuyerName2Reversed – these field names combine the related First Name, Last Name, Middle Initial and Name Extension into a single name as Last Name, First Name, Middle Initial, Name Extension. This typically should be used for halfFILE Buyer and Seller name fields.

TitleSubdivision – this combines SubDivCode, Block and Lot into a single field compatible with halFILE Subdivision base edit feature.

Setting up the Ramquest Lookup Feature

To set up the Ramquest Lookup feature, run HFRQ32.EXE from the halFILE program directory. This will display the screen below. Use the Data Extraction tab to set up the feature. Select the Application and database from drop down boxes. The Ramquest connect string is an ODBC connect string to connect to the Ramquest database. This should relate to a ODBC File DSN, typically stored in the DSN folder underneath the halFILE program directory. Contact hal Technical Support for help in setting this up.

Select the halFILE field which identifies the Ramquest file from the drop list. This will typically be a file number. At the bottom of the form add the halFILE fields which you want to post from Ramquest information as well as the related Ramquest field.

To test the system, save the set up by clicking the Save button and then enter a valid Ramquest File Number and click the Test button. A form will display the information that will be extracted from Ramquest.

halFILE to Ramquest Interface Setup

Application: TMI Title Company

Database: CL Closings

Ramquest connect string: filedsn=e:\halfile\source\v2.0\ramquest\dsn\rqccdevel.dsn;dbq=ccdevel;uid=halfile;pwd=hal

Data Extraction | Check Open Orders

halFILE field which identifies the Ramquest file: File_Number

halFILE Fields

- File_Number
- Grantor_Buyer
- Grantee_Seller
- Sub_Block_Lot
- Town_Range_Sect
- Address
- Tax_ID
- Closing_Date
- Comments

Ramquest Fields

- GFNo
- Branch
- SellerFormalName
- SellerBusinessName
- SellerName1First
- SellerName1MI
- SellerName1Last
- SellerName1Ext
- SellerName2First
- SellerName2MI
- SellerName2Last
- SellerName2Ext
- SellerName1Full
- SellerName2Full
- SellerName1Reverse
- SellerName2Reverse

Test File Number: [] Test Save Close

Ramquest Lookups in Action

The Ramquest Lookup feature occurs as documents are indexed in halFILE. When the specified Key Field is entered for a database that has been set up to extract data from Ramquest, the system uses that Key Field data to extract information from Ramquest and post it to the fields on the index screen. The data entry person can then review the fields for correctness and save the record.

For example:

1. The Key Field is the File_Number.
2. The halFILE fields being posted are Buyer, Seller, Address and Subdivision/Block/Lot.
3. BuyerName1Reversed and BuyerName2Reversed fields are set up to post to Buyer.
4. SellerName1Reversed and SellerName2Reversed fields are set up to post to Seller.
5. PropertyAddress is set up to post to Address.
6. TitleSubdivision is set up to post to Sub_Block_Lot.

Then:

1. The user goes into index a document.
2. The File Number on the document image is '12345.' The user enters '12345' into the File_Number field.
3. The user press TAB and the system extracts the Ramquest information and fills in Buyer, Seller, Address and Sub_Block_Lot fields.
4. The user reviews the posted data, enters any other data necessary then press CTRL-S to save the document.

If the file number cannot be found in Ramquest, a message is displayed.

Ramquest Pending Orders

Another feature to the Ramquest interface checks the Ramquest Complete Closing System for pending orders. This feature would typically be set up for a halFILE Title Plant database. As Title Plant documents are entered into halFILE, they can then be checked against Complete Closing to see if a pending order exists which may be affected by the document being indexed.

Setting up the Ramquest Pending Order Feature

To set up this feature, run HFRQ32.EXE and use the Check Open Orders tab. This will display the screen below. The top portion is set up like the Ramquest Lookup feature. In the bottom portion of the screen, select the halFILE database field for each label from the drop down boxes.

Also, fill out the Email Subject with the subject line of e-mail messages sent by this feature. The Email Body Header is filled in with what you wish the top of the body of the e-mail to contain. The Email Body Detail is filled in with what you wish the e-mail body to list for each order found in the Pending Order search. The Subject, Body Header and Body Detail boxes can include

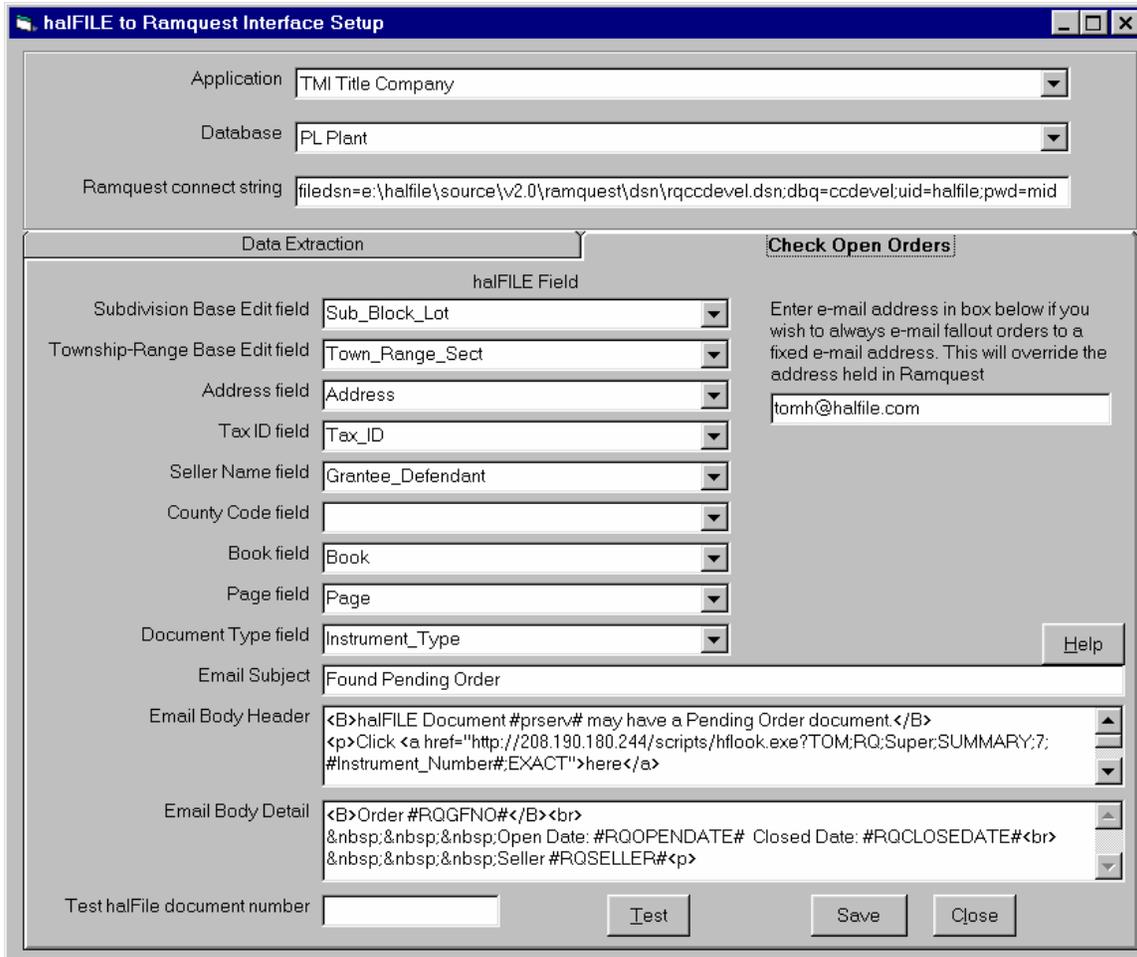
masks that will substitute live data from either Ramquest or halFILE as listed below. Note that only one mask per line can be used.

#RQGFNO# - Ramquest File Number
#RQCLOSEDATE# - Ramquest Close Date
#RQOPENDATE# - Ramquest Open Date
#RQSALESPRICE# - Ramquest Sales Price
#RQLOANAMOUNT# - Ramquest Loan Amount
#RQSELLER# - Ramquest Seller
#RQBUYER# - Ramquest Buyer
#RQLEGAL# - Ramquest Legal Description
#APPL# - halFILE Application ID
#DOCTYPE# - halFILE Document Type
#PRSERV# - halFILE Document Number
#<half file field name># - value of the related halFILE field

The Body Header and Body Detail boxes can also contain HTML code to format the message as desired.

Typically, the e-mail address to send the notification of a possible pending order is derived from Ramquest. However, if you want all e-mails to go to a specific email address, fill out the override e-mail address box on the right hand side of the screen.

To test the system, enter an existing 8-character halFILE document number and click the test button. This will perform the pending order check for data contained in that document.



Ramquest Pending Order Check in action

The Ramquest Pending Order feature occurs as documents are indexed in halFILE. When a document is save to the halFILE database supporting this feature, the data on the document is checked against open Ramquest orders. If possible open orders are affected, then a screen is displayed listing information for those orders. The user can then e-mail all or selected order information to the appropriate person.

Note: The Pending Order check for data in Ramquest that matches the data entered into halFILE is performed by Ramquest software. hal Systems makes no warranties as to the validity of the data matching. However, if you experience problems with this feature, you can contact a hal Systems Tech Support Representative who can contact Ramquest to resolve the issue.

Setting up a Plant Certification Date

To restrict searches of a plant database to only those records through the date to which the plant has been verified and certified, you can use the Group Security option. To use Group Security:

1. Turn on Security using Configure_Security and make sure the Enable_Security selection is checked.

2. Set up Users and access to databases using Configure_Security_User Profiles.
3. Set up Groups of Users using Configure_Security_Groups. Add a group named 'Plant Date' and, behind the Restrictions tab, select the File_Date or Record_Date field from the image database. Set the operator to <= and enter the plant certification date in the form mm/dd/yyyy in the values box.
4. Add search users to this group.
5. Add another group named 'Full Access' and add supervisors and other personnel to this group that will not be restricted by the plant date. You do not need to set up any restrictions on this group.

Printing Plant Certification Date on reports

To include the Plant Certification Date on reports built with Crystal Reports, you can either link the halffile database to the Groups table of HFWPparams where the certification date is defined or you can create a new database that links you from the image database to the parameter record which contains the Plant Date that was keyed into Document Level Security. To do this:

1. Using SQL Enterprise Manager, create a database called Plant_Date. (Note: the database name is not significant)
2. Create a table inside this database called GroupBridge. Create fields in the GroupBridge table as follows:

Field Name	Field Type	Length
DocType	Varchar	2
Appl	Varchar	3
Group	Varchar	50

3. Create an index called PrimeKey consisting of DocType (primary, unique).
4. Add a record to the GroupBridge table with DocType equal to the Document Type, Appl equal to the Application Id and Group equal to the name of the Security Group (i.e. 'Plant Date').
5. Add the new Plant_Date and HFWPparams databases to your Crystal Report set up for the report on which you want the certification date printed. We recommend using File DSNs to connect to these databases.
6. Set up a link from the PRDOC field in the PrimeTable table of the image database to the DocType field in the GroupBridge table.
7. Set up a link from DocType, Appl and Group in the GroupBridge table to the corresponding fields in the Groups table in HFWPparams.
8. On the report, print the Plant Certification Date by selecting the 'Value' from the Groups table in HFWPparams.

Pending Order System

Overview

The Pending Order System is used in Title Plant operations to ensure that no documents are filed which affect a Closing between the time the Abstractor searches the plant database and the time the Order is closed.

To accomplish this, the Pending Order System records the criteria used to search for documents for a Pending Order. Then, as new documents are indexed, the system checks the data entered against all the Pending Orders that have been recorded. If a match occurs, an e-mail message is sent to the person responsible for the Order.

The Pending Order System requires with some additional programs identified in the set up section below.

Set up

Setting up the Pending Order System consists of the following:

- ✍ Creating the Pending Order Database
- ✍ Enabling the Pending Orders in Index
- ✍ Enabling Pending Orders in Search
- ✍ Defining the e-mail sender program

Creating the Pending Order Database

To set up the Pending Order Database for an halFILE Application/Database, run **PENDING32.EXE**, located in the halFILE program directory. This program will let you select the application and database for which the Pending Order System must be set up. It will then let you select the Property Sets that will be used to determine Fallout transactions.

Property Sets are combinations of data fields used to search for documents for an Order.

Typical Property Sets are: Subdivision, Lot, Block
 Abstract, Acres
 Township, Range, Section, Quarter

When configuring Property Sets, select the Property Set Number, then add in the fields that are related and will make up that Property Set. Consider an example database consisting of the following fields:

Grantor	Subdivision	Township	Clerk Number
Grantee	Lot/Block	Range	Book
Abstract	Instrument Type	Section	Page
Acres	Instrument Date	Quarter	

Since, Abstract and Acres are related fields used in a Closing search, you would select Property Set #1 and then add the fields Abstract and Acres into the list of field in the Property Set. Property Set #2 would consist of Subdivision and Lot/Block. Property Set #3 would include Township, Range, Section and Quarter.

You can define as many Property Sets as needed. When all the property sets are defined, click the *Finish* button.

Enabling the Pending Orders in Index

Entries in HALFILE.INI in your Windows directory will enable the Pending Order check for fallout transactions when indexing a document. The following lines will cause halFILE to execute **PENDING32.EXE** when you save a document in Index by pressing CTRL-S. [ABCHFWPL] is the section for the image database for which the Pending Order System is active. ABC is the application name and PL is the database id. The IndexExecute line tells the system to run pending32.exe, passing in the application, document type and document number to perform the Fallout check. Be sure to add these HALFILE.INI entries on every workstation where Pending Order System is active.

[ABCHFWPL]

IndexExecute=pending32.exe S;%APPL%;%DOCTYPE%;%DOCNUM%

*A **Fallout** is a transaction or document that is indexed and add to the plant database after the initial search for documents involved in a close has been performed. For example, you performed a search for Subdivision XYZ, Lot 1, Block 2 on Monday but, before Closing on Friday a document was filed on Wednesday on that property. Wednesday's document is a Fallout which should be identified and reported by the Pending Order System.*

Enabling Pending Orders in Search

Entries in HFGLOBAL.INI in your halFILE program directory will activate the Pending Order System during search. When you search for a document for an Order, you can set up the Pending Order number along with the criteria. [ABCHFWPL] is the section for the image database for which the Pending Order System is active. ABC is the application name and PL is the database id. The **HitListButtonCaption** defines the word to be placed on the special Pending Order button. The **HitListButtonExecute** line tells the system to run pending32.exe, passing in the application and document type so the new Pending Order can be properly set up.

[ABCHFWPL]

HitListButtonCaption=&Pending

HitListButtonExecute=e:\halfile\pending32.exe C;%APPL%;%DOCTYPE%

Enabling e-mail support in halFILE

To enable e-mail support in halFILE, you should first install the e-mail application you wish to use throughout your organization. The e-mail application must be MAPI compliant such as

Microsoft Mail, Windows Messaging or Outlook. Once this application is installed and working properly you should define the e-mail sender program to be used at each workstation. Entries in HALFILE.INI in your Windows directory will define this sender as shown below. [halFILE for Windows] is the section name. MailSendApp= defines the program used to send Pending Order Messages. You should use either HALMAIL32.EXE. These are located in your halFILE program directory.

```
[halFILE For Windows]
MailSendApp=e:\halfile\halmail32.exe
```

Pending Order System in Operation

A new order is created on Thursday, January 8, 2003. The property is the Holiday Heights Subdivision (code HOLHI), Block 18, Lot 6, Section 6.

James, the Abstractor, performs a search for the property on Friday, January 9 and finds one document. Clicking the Pending button in the lower right hand corner of the Hit List shows a screen for Creating a new Pending Order. The Abstractor enters Order Number 9801001 along with the 'James' for the e-mail name of the person responsible for the Order. Click the Create New Order button to store this information along with the documents on the hit list.

Order # 9801001 for HOLHI Subdivision, Block 18, Lot 6 and Section 6 has been created in the Pending Order database. During index if any transactions are keyed for this property, the document will be logged as a fallout.

On Friday, January 9, 2003 a bankruptcy document is filed on the property. The document is scanned on Monday January 12 and indexed on Tuesday, January 13th. Mary, the Data Entry Operator, keys subdivision HOLHI, Block 18, Lot 6 and Section 6 which matches the criteria set saved for Pending Order #9801001. So, when the document is saved and message is shown notifying the operator that there is a Pending Order for the property. Mary clicks the **Close and E-mail** button to notify James of the Fallout document. The e-mail message is sent to James and the document is recorded in the Fallout database.

James receives a message from Mary about the Fallout. The message reads:

These documents may be viewed from within halFILE by selecting View-Fallout / Pending Orders from the search module. The following pending orders exist against document 00000357:

Order number: 9801001 document number: 99410011 and file number: 10011
with criteria HOLHI;18;6;6

James wants to print the document for his file so he goes into Search and selects the View_Fallout/Pending Order menu. Pending Order #9801001 appears in the list so he selects

it. He is asked if he wishes to clear the current hit list and he answers 'Yes'. The Hit list is loaded with the documents James found in his initial search for the property along with the Bankruptcy document filed on Friday and indexed earlier today by Mary. The Bankruptcy document is marked so James can note the Fallout documents. At this point James can:

- ✍ Print the marked documents for his file
- ✍ Print a report of the marked document for his file
- ✍ Print a report of all documents

James notifies Sally, the Closer, of the Fallout document. The Title Company notifies the buyer of the problem and cancels the order. The Order is now cancelled so it can be removed from the Pending Order database. To do this run 'PENDING32.EXE M' (M is for maintenance). Select the Application and Database and click the Maintain button. Select Order #9801001 and press the Delete button. This removes the Pending Order records and Fallout records from the database.

Within this maintenance section, you can also:

- ✍ Print a report of Fallout records
- ✍ Print a report of Pending Order records
- ✍ Delete a single Fallout or Pending Order record
- ✍ Edit a Fallout or Pending Order record
- ✍ Add a new Fallout or Pending Order record

Prior References Searches

Overview

halFILE has a feature which lets you perform a search and then automatically search for prior reference documents related to those documents in the hit list. This is set up by teaching the system how reference documents can be found using information in the database.

Set up

To set up Prior Reference Searches, do the following:

1. In the halFILE Administrator, go into File_Databases_References. This is the screen that needs to be filled out to set up a Prior Reference.
2. Drop down the Reference Set # box and select Reference Set #1. You can set up more than one reference set.
3. Drop down the Source Reference Field box listing the database fields. Select the field that contains your Prior Reference data.
4. Enter the delimiter, if any, that separates data elements within the selected Source Reference Field. For instance, typically the Prior Reference is keyed as a book and page in the form '123/345'. In this case, the delimiter is '/'.
5. From the Primary and Multi-entry field lists in the Target Reference Fields frame, select the fields that should be searched using the Source Reference Field data. For instance, if the

Source Reference Field contains book and page delimited by a slash, then for Target References, you should select the Book field first, then the Page field second.

As you enter information on this form, the example box at the bottom explains how the system will search for data. Review this to make sure it makes sense.

6. When the screen is filled out correctly, click the Save This Reference Set button.

Example

There is a multi-entry field called 'Prior_Reference.' When data is keyed in this field, it is always entered as '123/456' where '123' is the book and '456' is the page. The book field is called 'Book' and the page field is called 'Page' in the database. The Search References screen is filled out as follows:

1. The Source Reference field is 'Prior_Reference'
2. The delimiter is '/'
3. The Target Reference fields are 'Primetable.Book' and 'Primetable.Page'

Establishing Rules

For Search References to work correctly, you must establish rules for data entry which must be strictly adhered to. If, for instance, you set your delimiter to '/' but the data entry operator keys a prior reference as '123;456', then the system will be unable to properly parse the field and find the reference documents.

Using Search References

Within search, you can find reference documents in a couple of ways.

1. Perform a search and from the hit list select the menu select View_View Reference Documents. This will perform a reference search for every document in the hit list.
2. Perform a search and mark those documents in the hit list for which a Reference Search should be performed. On the menu behind the List Options button there will be a selection for 'View References for Marked items'. This will perform a reference search for every marked document in the hit list.

Short Cut Names

Short Cut Names is a feature that reduces data entry into name fields such as Grantor or Grantee.

Database Setup

The Short cut names feature is set up during database design. When you add a name field to your database (File_Databases_Add New), you define the field as an internal table, specify the table name and check the box labeled:

Check this box if you want to enter codes as well as free form data into this field and post the description to the database.

After you've checked the box, change the field length to the correct size for the field.

Creating the Short Cut Name Table

The table used for Short Cut Names is like any standard halFILE internal table. Use File_Tables to set up the table. The code field in the table is the abbreviation you want to enter when indexing. The description is the long name that is stored in the database. For instance, the code would be 'FNB' and the description would be 'First National Bank.'

IMPORTANT: For individual names, enter the name just as you would key it into halFILE. Typically, names should be entered last name first, then the first name, then the initials or middle name. You should set up the table in the same fashion. For example, if you wanted to set up a short cut for John Doe, the code could be 'JD' and the description would 'Doe, John.'

Using the Short Cut Names feature

This feature works in Index and Search. When you are keying a short cut name, you enter the abbreviation that you set up in your internal table. When you press the TAB key to go to the next field, the system replaces the abbreviation with the full description. In multi-entry fields, you can key a mix of full names and abbreviations. For instance, you can enter the following:

Smith, Mary
JD
FNB
Jones, Bob

When you press TAB, the system performs the replacement so you get:

Smith, Mary
Doe, John
First National Bank
Jones, Bob