

halFILE Vital Records Paper Auditor

Auditing the Printing of Vital Records Paper for the halFILE™ Document Manager

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Systems Corporation

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Table of Contents

Overview.....	3
Program Set up.....	3
Integrating the halFILE Vital Records Paper Auditor set up operation with the halFILE Manager or halFILE Administrator	3
Integrating the halFILE Vital Records Paper Auditor printing function with the halFILE Module.....	4
Running the Vital Records Paper Auditor Database for the first time	4
Menu Structure.....	4
Program Options	5
Program Operation.....	8
Vital Record Paper Workflow	8
Reviewing Database Records / Making Adjustments.....	11
Status Summary	12

Overview

The halFILE Vital Records Paper Auditor, HFVitalPaper.exe, is typically used in County Government installations to monitor the use of Vital Record paper. The system includes:

1. Recording blank Vital Records paper to be used for printing from a selected halFILE Vital Records database.
2. Setting up annotations to be applied when Vital Records paper is used for printing.
3. Printing Vital Records from the halFILE Search module.
4. Recording the usage of Vital Records paper.
5. Browsing the Vital Records Paper database and make adjustments as needed.
6. Reviewing the status of used and unused Vital Records paper.

Program Set up

The system requires the following components:

- HFVitalPaper.exe - placed into the halFILE program directory
- HFPrint.dll – placed into the Windows\System32 and registered
- Latest versions of HFW20.EXE, HFADMIN32.EXE and HFSEARCH32.EXE which provide user-defined menus that can be used to run HFVitalPaper.exe

The following optional components may also be configured:

- Barcode wand installed as a “keyboard wedge”

You should also create a samplepage.tif in the halFILE program folder. This is used for displaying and printing samples of annotated documents.

Integrating the halFILE Vital Records Paper Auditor set up operation with the halFILE Manager or halFILE Administrator

The following setting can be placed in hfmenu.ini to add a user-defined menu to the halFILE Manager and/or the halFILE Administrator. This menu will run HFVitalPaper.exe. Hfmenu.ini resides in the halFILE program folder.

[MENUS]

; this section configures the top-level menu captions
ManagerMenuCaption=Utilities
AdministratorMenuCaption=Admin Utilities

[Vital Record Paper]

; this section configures menu caption “Vital Record Paper” which appears on the Manager
; Utilities and the Administrator Admin Utilities menus for ALL databases
ShowOnManager=TRUE
ShowOnAdministrator=FALSE
MenuProgram=E:\HALFILE\HFVitalPaper.exe
MenuOptions=%appl%;%doctype%;%user%

Other menus can be included as well. For example, the following places the halFILE Database Validator on the Administrator menu

[Database Validator]
ShowOnManager=FALSE
ShowOnAdministrator=TRUE
MenuProgram=E:\HALFILE\HFValidate.exe

To restrict the menu to a particular database, you can add the “Restrict_<appl>_<database>_” to the beginning of the menu. For example, “[Restrict_GCTPR_Vital Record Paper]” would restrict the Vital Record Paper menu to the GCT application, the PR database.

Integrating the halFILE Vital Records Paper Auditor printing function with the halFILE Module

The following setting can be placed in hfsearchmenus.ini to add a right-click user-defined menu to the halFILE Search module. This menu will run HFVitalPaper.exe to print the selected document on vital records paper. Hfsearchmenu_<appl><database>.ini resides in the halFILE program folder. For example, HFSearchmenu_GCTPR.ini would control the right click user-defined menus for the GCT application, the PR database.

; this section simply add a blank line to the right click hit list menu.

[-]

MenuProgram=

; this section runs the vital record printing module

[Print Vital Paper]

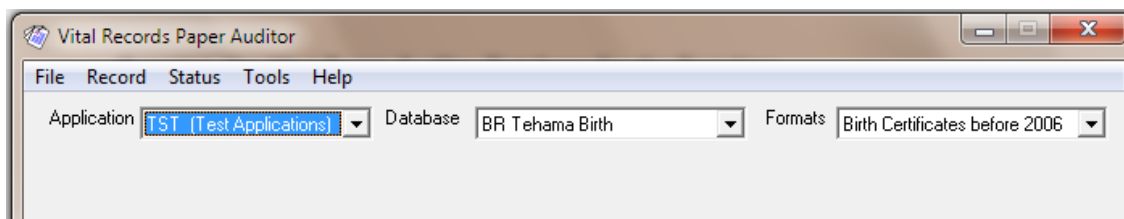
MenuProgram=\\hal_nt40\source\HALFILE\SOURCE\v2.2\testarea\HFVitalPaper.exe

MenuOptions=%appl%;%doctype%;%user%;%prserv%

Running the Vital Records Paper Auditor Database for the first time

Using the user-defined menu set up above, when you click the Utilities-Vital Record Paper menu. The first time you run HFVitalPaper.exe, you will receive an error because the VitalPaper table is missing from the HFWParams database. Click through the error and you will be asked if you wish to create the table.

Once the table is created, the following screen is displayed. You may change databases as needed using the drop down boxes at the top. The menus let you perform various functions within the program. A separate set up should be defined for each databases (i.e. Birth, Death, and Marriage Records).



Menu Structure

File-Close – exits the program

Record-Blank Paper – records blank vital record paper into the database

Record-Adjustments - views database records and allows for changes

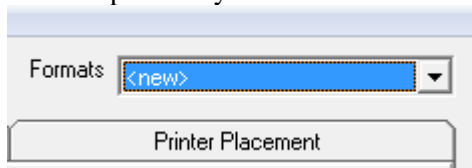
Status-Summary – shows a summary of used and unused vital records paper

Tools-Options – loads the set up screen to define options and annotations

Help-About – shows brief program information

Program Options

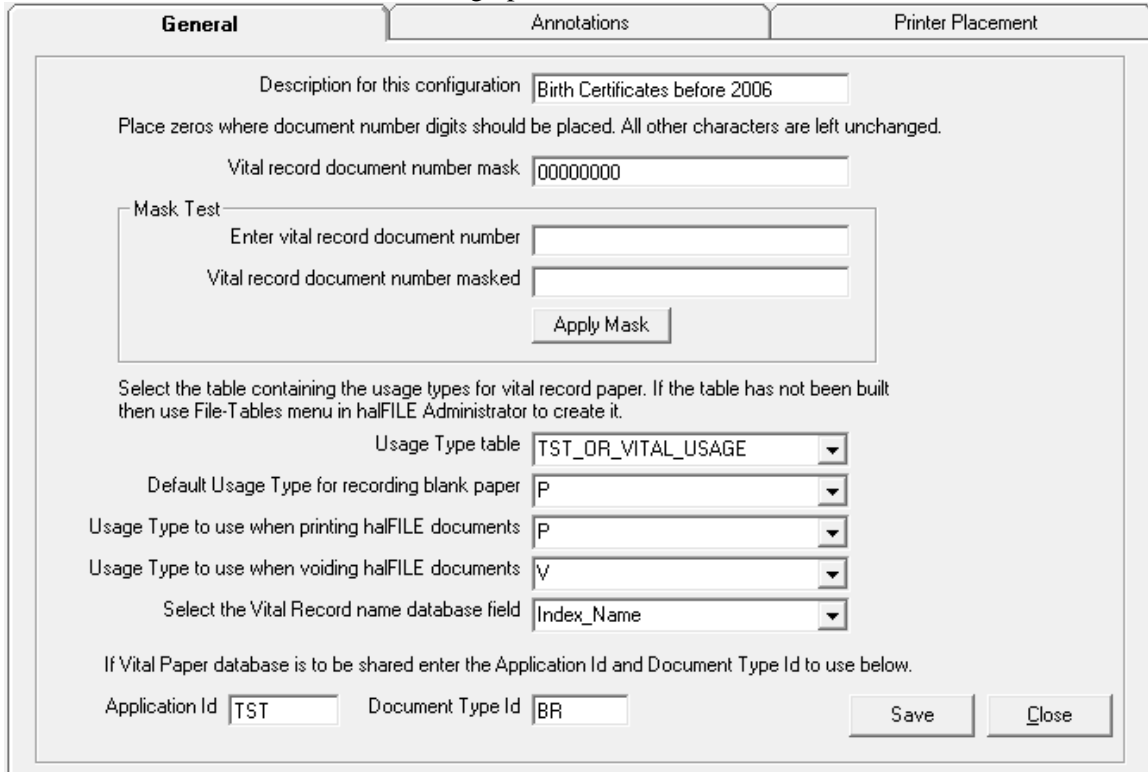
Select the **Tools-Options** menu to set up the necessary parameters for operation. At least one format must be configured. In the drop-down 'formats', pick '<new>' to create a new format. One can set up as many 'formats' to handle the various vital record paper stored inside halFILE.



Formats: <new>

Printer Placement

The **General** Table shows the following options.



General Annotations Printer Placement

Description for this configuration: Birth Certificates before 2006

Place zeros where document number digits should be placed. All other characters are left unchanged.

Vital record document number mask: 00000000

Mask Test

Enter vital record document number: []

Vital record document number masked: []

Apply Mask

Select the table containing the usage types for vital record paper. If the table has not been built then use File-Tables menu in halFILE Administrator to create it.

Usage Type table: TST_OR_VITAL_USAGE

Default Usage Type for recording blank paper: P

Usage Type to use when printing halFILE documents: P

Usage Type to use when voiding halFILE documents: V

Select the Vital Record name database field: Index_Name

If Vital Paper database is to be shared enter the Application Id and Document Type Id to use below.

Application Id: TST Document Type Id: BR

Save Close

Description for this configuration - You can have multiple configurations or formats for a single database. When you enter a description and save the settings, the description entered here will appear in the 'formats' drop-down box at the top. When more than one configuration is defined for a database, then when you are printing on Vital Records Paper, a prompt will ask the user which format to use. The description should be unique and descriptive enough to distinguish it from the other configurations.

Vital record document number mask – Vital record document numbers are stored in the database in numeric format. This mask is used to format the document number for display. For example, if the mask is 00000000 and the document number is 1344 then the document number will be displayed as 000001344.

Mask test – this frame is used to test your mask. Enter a sample document number and click the Apply Mask button. The masked document number will appear in the Vital record document number masked box.

Usage Type table – a halFILE table should be set up to define the various methods that the vital record paper may be used. For example, documents may be printed, reproduced from microfilm, or copied. This should also contain a code for voided transactions. The Usage Type table lets you select the halFILE table which contains these usage types. To set up your usage type table, use the File-Tables menu in the halFILE Administrator.

Default Usage Type for recording blank paper – from the items in your Usage Type table, select the item used as the default when you record blank paper. For example, if you normally use blank Vital Records paper in a printer then select “printer” from the list shown.

Usage Type to use when printing halFILE documents – from the items in your Usage Type table, select the item used as the default when you print a vital record from halFILE. Normally, this would be “printer”.

Usage Type to use when voiding halFILE documents – from the items in your Usage Type table, select the item used as the default when the printing of a vital record from halFILE fails and the Vital Records Paper is recorded as “void”.

Select the Vital Records name database field – select the name field from the list of fields in your Vital Records database. The value of this field is recorded in the Vital Records Paper database when a document is printed.

If Vital Paper database is to be shared enter the Application Id and Document Type ID to use below – If you have several halFILE databases from which documents will be printed on vital records paper but one common bank of Vital Records Paper, then you should share the Vital Paper database. Enter the 3-character Application ID and 2-character document type id to use for the Vital Records Paper database.

The **Annotations** tab shows the following options:

Annotation Number – up to 3 annotations may be applied to a document. Select 1, 2 or 3 from this list to configure the settings for that annotation.

Font Settings – click the **Set Font** button to define the font settings for the annotation. This will fill in all the font boxes accordingly. This sets the **Font, Font Size, Font Color, Font Bold, Font Italic, Font Underline, and Font Strikethrough** parameters.

Make Permanent – this causes the annotations to be permanent on the printed image. **Note: the original image is not modified in any way by this process.**

Fill Style – select **Transparent** to make the annotation appear like a watermark where the document text may be seen behind the annotation. Select **Opaque** to make the annotation solid, where text behind the annotation cannot be seen.

Annotation Text – Enter the text for the annotation. Multiple lines are allowed. If you wish to include page numbers within a document then enter %firstpg% for the first document page (always page 1) and %lastpg% for the last document page. (Example: Amended page %firstpg% of %lastpg%)

Print annotation only when – this parameter lets you define when an annotation is included. For example, if a database field called Amended is set to YES when a document has been amended, then you can select the Amended field from the 1st drop down box, select the equal sign from the 2nd drop down box and enter YES in the 3rd box.

X Offset (+/-) – this indicates how far over from the left side of the page the annotation will begin. This is measured in pixels.

Y Offset (+/-) – this indicates how far down from the top of the page the annotation will begin. This is measured in pixels.

Rotation (deg) – this causes the annotation to be applied after rotating the image. For example if you want a the “Amended page 1 of 2” annotation to appear vertically on the left-side of the page, you would enter 90 in this box. Valid values are 0-360

View Test Page – displays a test page with the annotation applied.

Print Test Page – prints a test page with the annotation applied.

The **Printer Placement** tab shows the following options:

General Annotations **Printer Placement**

Scale Factor is used to shrink the image to fit on the destination page. For example, .8 will shrink the image to 80% of its original size.

Scale Factor

The Image can be place on the printed page either centered (check centered below) or at a position as designated by the Top and Left parameters below.

Centered on printed page Top Left (in pixels)

Designate the printer and tray that hold the Vital Paper below (the printer must be PCL compliant)

Target Printer

Printer Tray

Preview the image to be printed before sending it to the printer

Scale factor – this indicates how much the image should be shrunk before printing. For example, to print the image at 80% of its original size, enter .80.

Centered on printed page – this will automatically center the shrunken image on the page.

Top and Left – as an alternative to centering using the above parameter, these parameters define exactly where to place the top and left corner of the image on the printed page. This is measured in pixels.

Target Printer – defines the printer to which vital record paper printing is performed. Note: the printer selected must be PCL compliant and the printer name must be less than 30 characters in length.

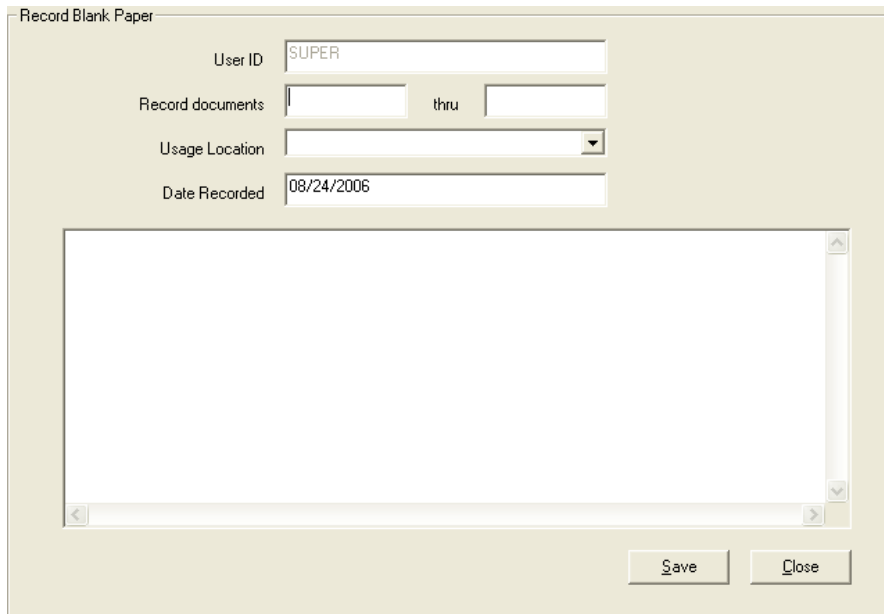
Printer Tray – indicates the printer tray to select for printing.

Preview – this causes the preview screen to appear when a vital records page is printed.

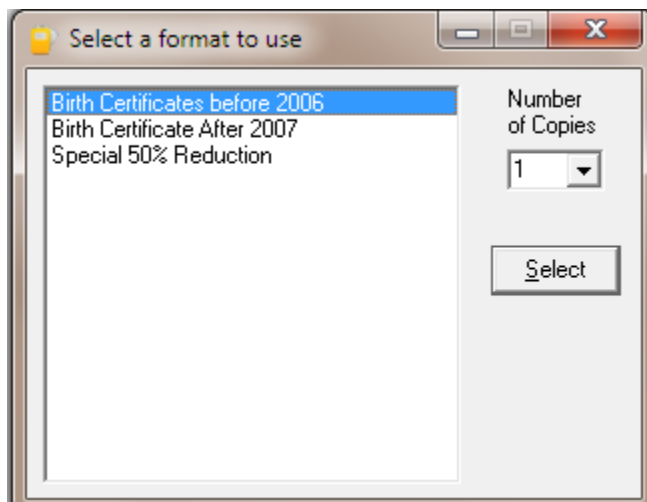
Program Operation

Vital Record Paper Workflow

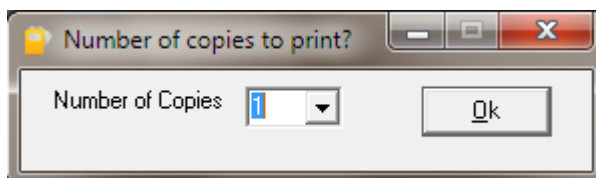
1. A ream of new, blank vital record paper needs to be introduced into the system. The operator selects the Record-Blank Paper menu and either keys or barcode wands the first and last page into the form as shown below. The usage location should also be selected. The system then records the entire ream of paper into the database, a record for each page.



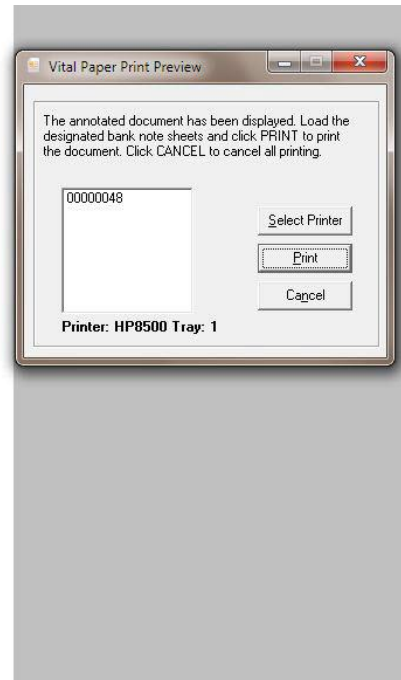
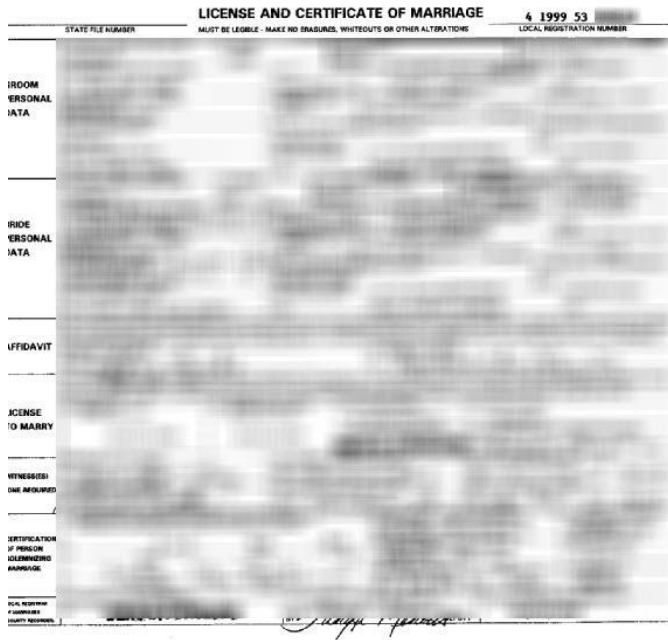
2. A request for a reproduction of a vital record comes in. The operator performs a halFILE search for the requested document and, on the hit list menu, right clicks and selects “Print Vital Paper” (based on set up described above).
3. If more than one format is set up for Vital Record formats, then the following screen will be shown. Here you will pick the format to be used, along with the total number of copies you wish to print. Click on the 'Select' button to proceed.



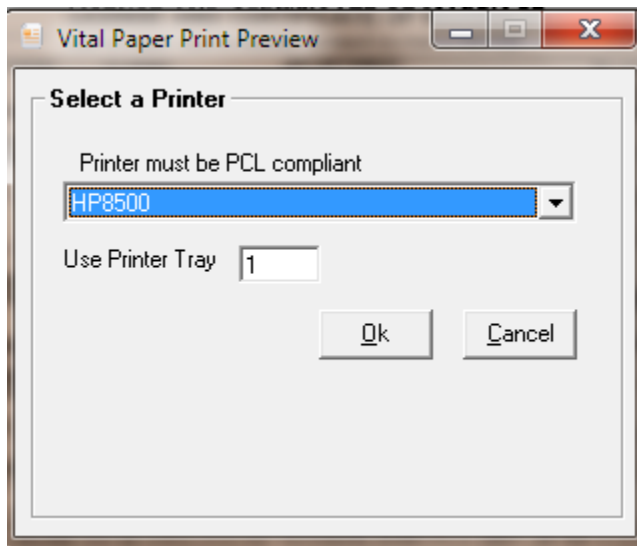
If only a single format is defined then the following screen is displayed instead. The number of copies should be picked and the 'Ok' button clicked to proceed.



- The system indicates the first Vital Record document number to place into the printer. If the preview option is selected, the following screen is shown. This shows the document to be printed, annotations applied, as well as a form listing the vital records pages needed. Click print to send the document to the printer.



Notice that the printer name and tray are shown in bold below the list of vital records pages. If you want to print to another printer, click on the 'Select Printer' button and you will see the following screen.



Select a printer from the drop-down list and the tray to use. Click on the 'Ok' button to go back to the prior screen where you would click on the 'Print' button to print the annotated document.

5. After printing, the operator is asked if the documents printed correctly. Clicking YES marks the document as used in the Vital Records Paper database. It also records the name from the database record, the date used, and the operator id. If the documents did not print correctly, clicking NO will mark the document as voided in the Vital Records Paper database.

Reviewing Database Records / Making Adjustments

Use the Record – Adjustments menu to review Vital Records Paper database records and make necessary adjustments. This displays the following screen.

The screenshot shows a software window titled "Vital Record Paper Maintenance". The window contains several input fields for data entry: "Document Number", "Recorded By", "Date Recorded", "Certificate Name", "Usage Location" (a dropdown menu), "Date Used", "Used By", and "Comment". Below these fields is a row of seven buttons: "Find By Number", "Find By Date", "Find Last Used", "First Available", "Last Voided", "Next", and "Prior". At the bottom right of the window are two buttons: "Save" and "Close".

Use the buttons at the bottom to find documents as follows:

Find By Number – this pops up a box where you enter the document number to find.

Find By Date – this pops up a box asking for the date to search for. Enter the date in mm/dd/yyyy format and click OK. You are then asked to answer YES if you wish to search by date recorded or NO if you wish to search by date used.

Find Last Used – displays the last document used.

First Available – displays the first document available for printing.

Last Voided – displays the last document that was voided.

Next – browses to the next document.

Prior – browses to the prior document.

Save – save any adjustments made.

Status Summary

The **Status – Summary** menu is used to show a summary of Vital Record Paper usage. For Used Paper, it shows Last Sheet Used, Date Used and Used by (operator id).

For unused paper, it shows Last Sheet Recorded, Date Recorded, Recorded by (operator id) and a count of available sheets.

For voided paper, it shows Last Sheet Voided, Date Voided, Voided by (operator id) and a count of voided sheets.