Starter System

Addendum to halFILE™ Document Manager

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hal

Systems Corporation

Starter Searches

The Starter System in e.halFILE was designed for the Title Industry but may have valuable application in other types of organizations as well. With this system, you define "criteria sets" consisting of fields which are commonly searched. Then, you can fill in all of the criteria for these sets and the system can perform a search using the criteria for each set to derive a composite search.

Starter searches, therefore, are useful when more than one search must be performed to perform the full search. Instead of perform an initial search, then one or more append searches, with the Starter system you can fill in all the criteria and perform back to back searches for each criteria set.

Performing a Starter Search

Let's go through an example to help you understand this feature. For a database examination, I need to perform 4 separate searches for the following fields defined as criteria sets:

- Criteria Set 1: Grantor
- Criteria Set 2: Grantee
- Criteria Set 3: Subdivision_Block_Lot
- Criteria Set 4: Township_Range_Section

So, I fill in the search criteria on the standard Search Criteria page as shown on the screen example below.
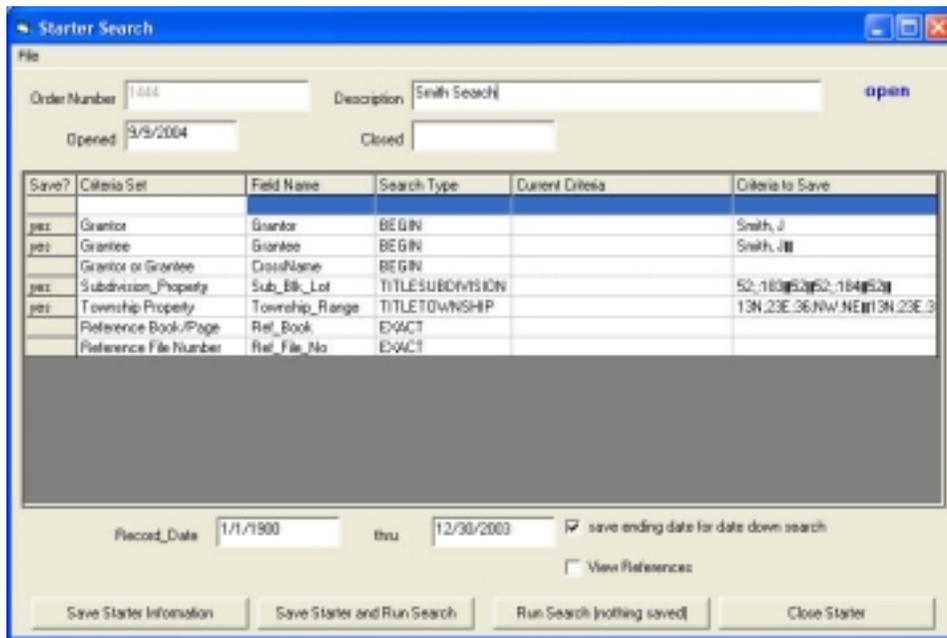
You then click the **Starter-Create** menu and the system asks you to enter an Order Number for the search.

Then, the system checks to see if that order exists and displays how the criteria sets are to be saved for the Order. It also asks for an Order Description and provides boxes for the Open Date (filled with today's date) and Closed Date (left blank on new orders).

The **Save?** column on the left indicates which fields you want to save to the Order. Normally, you would leave all items set to yes as is the default but they come in handy when you want to update the criteria for an order. To toggle the yes/no double click the cell. Also, at the bottom of the grid you will find the date range to search. The beginning date on a new order is preset at 1/1/1900. The ending date is either today's date or if configured, the system can pull the ending date from the database name. For example, if you maintain the database verification date in the database name, as the last characters of the name, the system can strip it off the name. Either way, if the "save ending date for date down search" check box is checked, then the ending date is save to the order so it will be available for "date down" searches at a later time. Finally, there is a "view references" check box at the bottom. If this is checked, the reference documents will be included in the search.

The **Save Starter Information** button saves the Starter information under the order number you provided. The information is stored in the halFILE database and is given a document type of "Starter" as defined in the parameters. The criteria set information is also stored in the related database fields in the database.

The **Save Starter and Run Search** button saves the starter information, and then performs a "starter search". A search is performed for each criteria set and a composite hit list is displayed as shown below. If you want to perform the search but do not care to save the starter information to the database, click the **Run Search** (**nothing saved**) button.
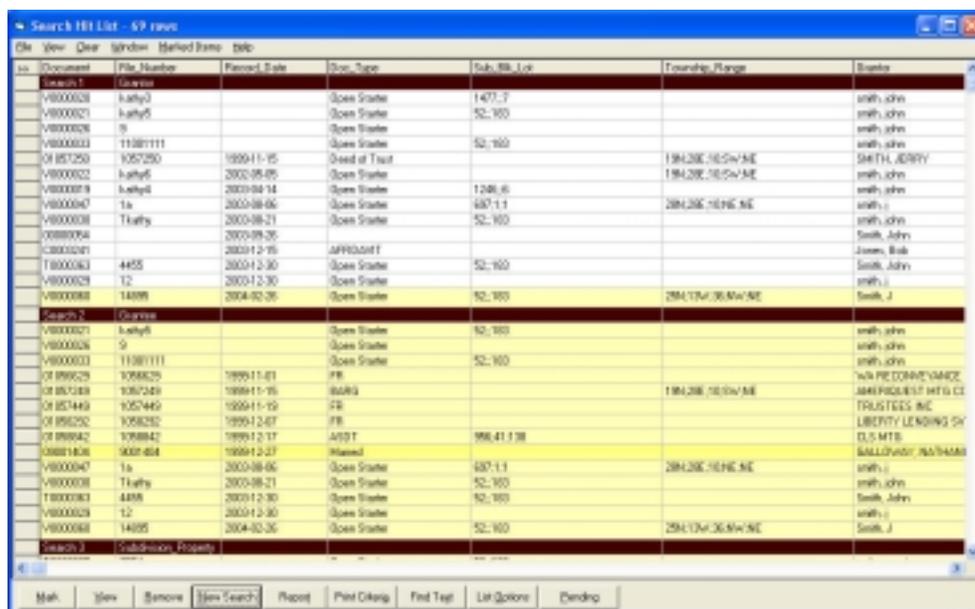
There is a header line for each criteria set so you can easily see the results of each search.

Date Down Searches

Once a starter has been saved, a "date down" search can be performed to search the database for records added since the initial search was performed. To perform a date down search:

1. Select the **Starter-Edit** menu on the search criteria page and enter the order number to use for the date down search.
2. The criteria set page is displayed showing the criteria from the initial search. This time, however, the left-hand Save? column for all criteria sets is blank. Double click the cell in this column to indicate which fields to search by setting the cell to YES.
3. Check your date range which will show a beginning date equal to the ending date of the last search you performed for this starter.
4. Click the **Save Starter Information and Run Search** button or the **Run Search (nothing saved)** button to perform the date down search.

Closing a Starter

To close a starter record, edit the starter as described above then click the **Close Starter** button. The document type for closed starters is posted to the record. Closed Starter do not appear on the Fallout Report.

Re-opening a Starter

To re-open a starter record, edit the starter as described above then click the **Open Starter** button. The document type for closed starters is posted to the record.

Copy a Starter to a new Starter

To copy the search criteria for a Starter to a new Starter, edit the starter as described above, then select the **File-Copy Starter** menu and enter a new order number. This changes the Starter Number on the form to the new starter number. Then click **Save Starter Information** or **Save Starter Information and Run Search** to save the new starter.

Saving the Grid Format of the Starter Information Form

You can resize the columns as needed on the Starter Information Form. Once the grid is sized to your liking, select the **File-Save Grid Layout** menu to keep the columns widths as the default settings.

Fallout Report

The "Fallout Report" is a report of any new database records that did not exist when the original starter search was performed. The report finds all the open starters and then for each starter, a search is performed to determine if any new records meet the search criteria for the starter criteria sets. Matching records found are then listed on the Fallout Report.

The Fallout report can be run interactively or in auto mode. To run the report interactively, select the **Starter-Fallout Report** menu on the Search Criteria window. The date range is automatically filled in from the last time the report was run. The available fallout reports are listed in a drop down box. Select the report to run and click the **Run Report** button. Once report processing is complete, a message is displayed. Then click the **Print Report** to print the report results.

To run the report automatically, you can schedule a job using SQL Server Agent that runs the following command line:

<drive and path>\HFFallout.exe AAA;DD;User

where <drive and path> designate the location of hffallout.exe and AAA is the application id, DD is the database id and USER is the user id under which the report is generated. When the report job runs, the report files are saved in the user's folder. Then, the user can return to the Fallout Report menu, select the report and click the Print Report button.

To save the ending date as the new starting date for the Fallout Report, click the **Save New Fallout Date** menu.

Starter Setup

The Starter tab of the Tools-Options menu in the halFILE Search menu is used to set up the Starter System. With this system, you define "criteria sets" consisting of fields which are commonly searched. Then, you can fill in all of the criteria for these sets and the system can perform a search using the criteria for each set to derive a composite search. The Starter tab is used to configure options for halFILE's Starter system which are saved to hfstarter.ini. Note that for e.halFILE, these options are placed in halweb.ini.

You will find information on using the Starter system in the main Search help file.

Enable this feature - check this box to enable the Starter system.

Database name contains the latest posted date in the last 10 characters - this option tells the system that the posted or plant date through which the database has been verified can be found in the last 10 characters of the database name (File-Databases-ODBC Info button of the Administrator). For example, "Jackson County thru 10/15/2004" would be an example where this option is valid.

Starter Number Field - the Starter Number is the number under which the Starter criteria information is stored in the halFILE database. Select a field in which to store this information. Typically a file number field is used. The Starter Number is entered by the user setting up the Starter.

Starter Description Field - select the field where the description of the search is stored. The description is entered by the user setting up the Starter. This could be a remarks or comments field.

Open Date Field - select a date field where the date the starter was created is stored.

Close Date Field - once the starter search is no longer active, it can be closed. Select the date field where the date the starter was closed is stored.

Starter Status Field - the Starter system posts an "open" status to the starter record when the starter is created and a "closed" status when it is closed. Select the field to be used to hold the status of the Starter. This is normally a document or instrument type field.

Fallout Date Field - this identifies the date to be used for the date down searches. Each time a search is performed for a starter, the date of the search is recorded in this field and becomes the beginning date for subsequent searches using this starter.

Security Group Field - in cases where multiple users are creating starters and you wish to configure the system so each user can see only the starter that he/she create, you can post this users security group (Configure-User Groups in the halFILE Administrator). If you select a field for storing the Security Group, then the group the user is in is stored in this field when the starter is created. You should then configure the User Group security to prohibit the viewing of Starter documents containing some other group value.

Open Status Value - the value to post to the Starter Status field when a starter is created. For example, "STRO" could be the code used for Open Starter.

Closed Status Value - the value to post to the Starter Status field when a starter is closed. For example, "STRC" could be the code used for Closed Starter.

New Document Prefix Letter - Enter a one character prefix letter to be used when create the starter document record in the halFILE database. Try to configure a unique letter not used by as a Station Id on capture stations.

Starter Basket - enter the basket name to be used for newly created starter documents. This must be a valid basket name. We recommend a basket named "Starter."

Criteria Sets

You can configure a number of "criteria sets" which define a single halFILE search. Typically, in a Title Plant situation, the following criteria sets would be configured:

- Grantor
- Grantee
- Cross Name
- Subdivision
- Township-Range

To set up a criteria set, select the set number from the Criteria Set drop down box, configure all the options, then click **Save Set**.

Set Description - describes the search for this criteria set. Normally, it would be similar to the field selected in the Field to search box.

Field to search - select the field to search when the starter search for this criteria set is performed.

Order hit list by - enter the order by clause to use when the starter search for this criteria set is performed. The default button selects an order by using the field selected in the Starter Number field box. This must use valid SQL statement form and the field names used must be valid to prevent an error from occurring when a search is performed.

Default search type - select the default type of search to perform for this criteria set. The following are our recommendations for the common starter criteria sets.

- Grantor - BEGIN
- Grantee - BEGIN
- Cross Name - BEGIN
- Subdivision – TITLESUBDIVISION (automatically performs Add All Levels search)
- Township-Range - TITLETOWNSHIP (automatically performs Add All Levels search)

Fallout Report

The Fallout Report is part of the Starter System. A "Fallout Report' can be processed which performs a "date down" search (since the last time the report was run) for every open starter in the system. This is used to identify newly posted documents that may affect open starter searches. The Fallout Report tab configures the options used to print the report. The report must be built using Crystal Reports.

Fallout Report Description - describes the report.

Fallout Report Path - the path where the Crystal Report is located.
Fallout Report File - the file name of the Crystal Report. Do not enter any path information, just the report file name.

Last Fallout Report Date - this shows the date the report was last run. This date will be used as the starting date for the next Fallout Report process.