

# halFILE Merge Utility

## Addendum to halFILE for Windows™ Document Storage & Retrieval

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Systems Corporation

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doc # hfw0038\_v30

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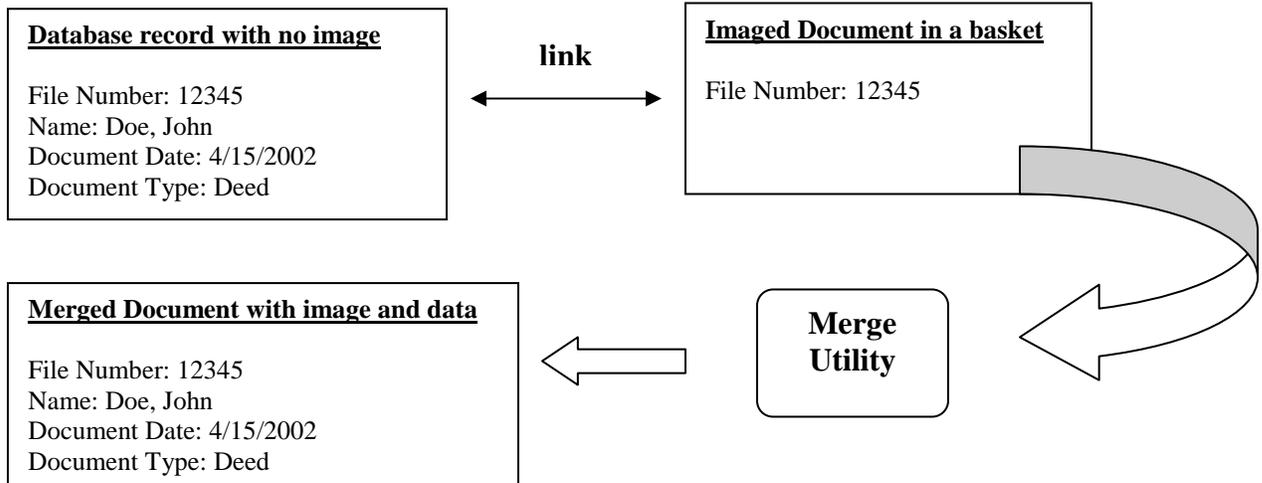
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## Overview

The Merge utility is used to append images to halFILE documents that do not have images. The utility works against a designated basket containing images that are indexed with just enough information that will ensure that a unique link can be made to the database record that includes the full index information.

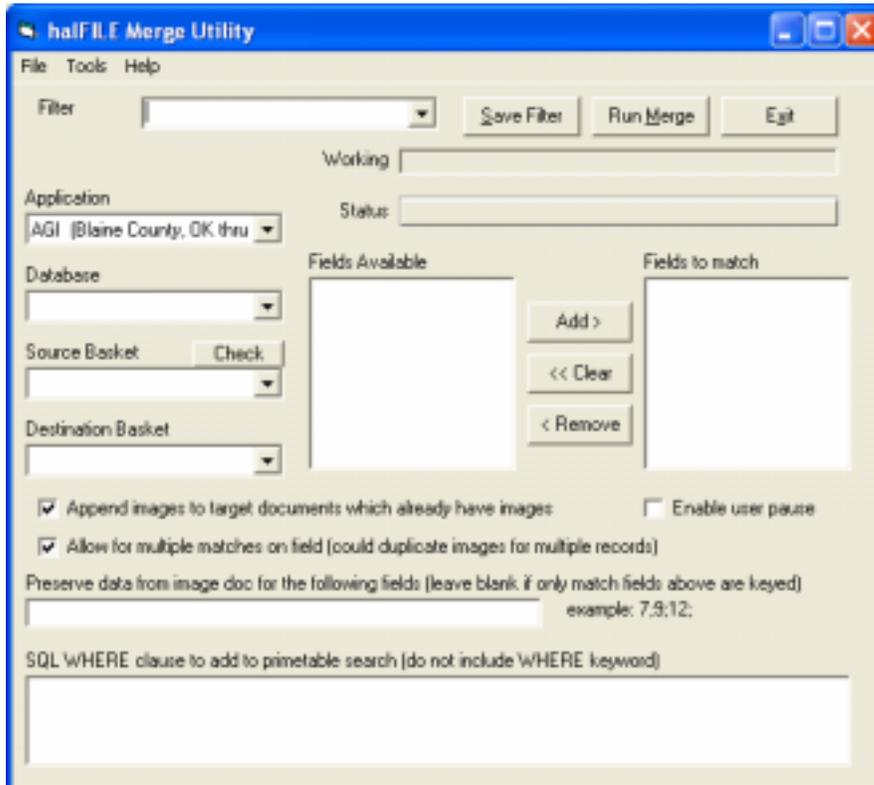
The following chart illustrates this process:



The Merge utility is named HFMERGE32.EXE and can be found in the halFILE program folder.

## Setup

When you run HFMerge32exe, you are first presented with the following screen to define the merge filter, select the Application, Database and Basket and designate which database fields are used to link the non-imaged database record with the imaged documents. Multiple filters can be defined.



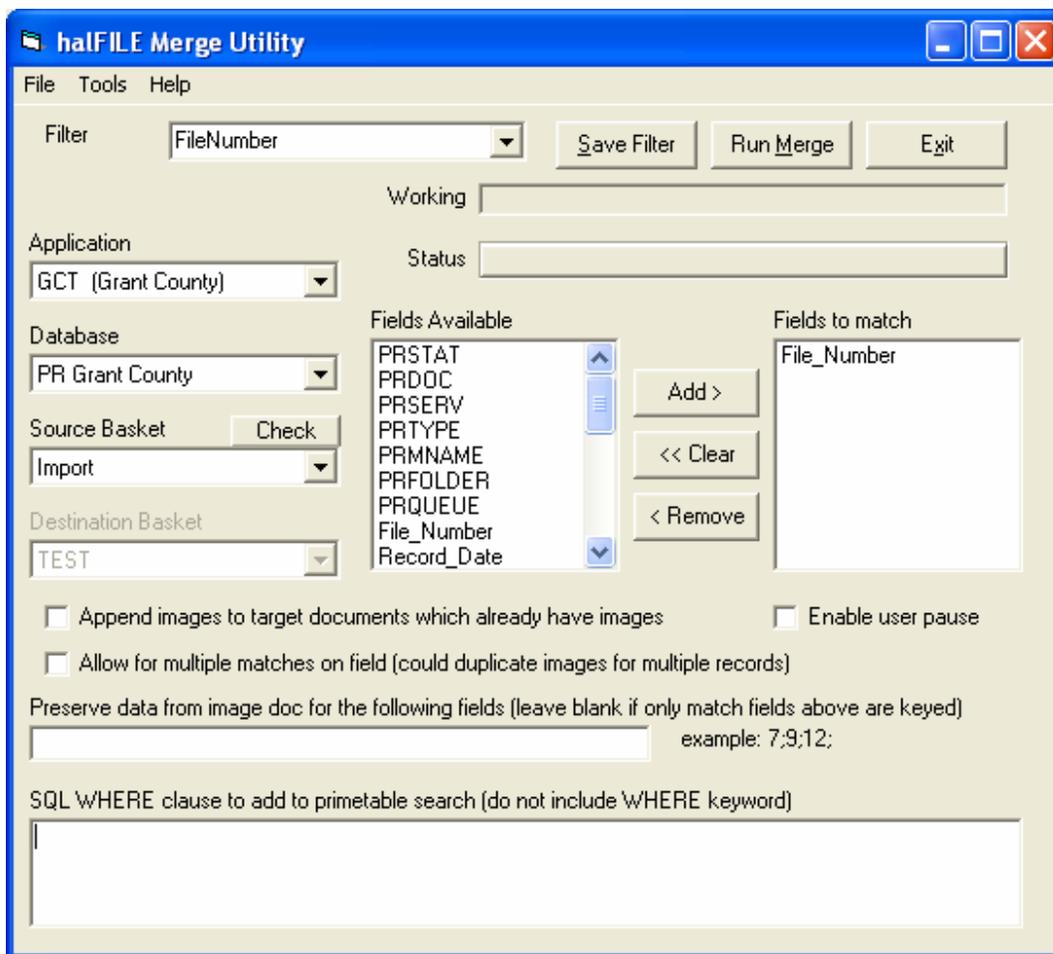
As an example, let's define a filter based on a File Number field that we have in our halFILE database. I have historical records in my database that are indexed by several fields including a unique File Number, as well as a date, name and document type. These historical records, however, do not have images. I have scanned or imported these images into my IMPORT basket and have indexed them on File\_Number alone. Now I need to use the Merge utility to link them.

For the Filter name, I enter FileNumber and I select the application and database and IMPORT basket. When I pick these, the **Fields available** list is refreshed to show the fields in my database. I highlight the File\_Number field and click add to include it in by **Fields to match** list.

Since none of these historical documents have images, I uncheck the "Append images to target documents which already have image" option.

Since the File Number field is unique to this database, I uncheck the "Allow for multiple matches on field" option.

Click the Save Filter to save these settings. The settings screen should be similar to the following.



Now when I click the **Run Merge** button, the utility will go through the IMPORT basket and for each document it will:

1. Read the associated database record to get the File Number.
2. Search the database to locate other records filed under this File Number.
3. If a single record is found without images, it will "attach" the images to the record.
4. If a match cannot be found, then the basket status for the document is set to "scan-complete."

## Other Options

Other options included with the Merge utility include:

1. If more than one field is required to obtain a unique match between the imaged document and the non-imaged document then you can add multiple fields to the **Fields to match** box.
2. If the target document may have images, you can select the “Append images to target documents which already have image” option. However, if you know that none of the target documents have images, you should always uncheck this option.
3. If there could be multiple records found when matching and you wish to append the images to all of the matching records you can check the “Allow for multiple matches on field” option.
4. If the imaged document has been indexed on fields that you do not wish to replace with fields from the non-imaged document, then you can use the “Preserve data from image doc for the following fields” option. Here, you enter the ordinal positions of the fields. For example, if you index the imaged document on File Number and Date Scanned and wish to preserve the Date Scanned field then you would enter the ordinal positions of every indexed field except the Date Scanned field.

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*Note: The preserve data option is for user-defined fields only beginning with ordinal position 7. If your fields include File Number, Name, Date Filed, Document Type and Date Scanned, in that order, then you would enter 7,8,9,10 into the field list since Date Scanned is the 11<sup>th</sup> field of your database.*

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5. If you want to limit the matching of documents to include a subset of the database, you can use the “SQL WHERE...” box. For example, if the File Number started over for each year, therefore causing duplicates, you can use this box to match only document for the year that was being merged. (Example: Date\_Filed between ‘1/1/2002’ and ‘12/31/2002’ )