LOADMASTER ENTERPRISE

Document Tracking

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Document Tracking

<u>Introduction</u>

Document tracking within Loadmaster provides the bibliographic ability to store and access information and allows you to store images and PDFs of all types in a structured way for future retrieval.

It has been merged with our standalone Docutrak program to achieve this. Images can be existing PNG, BMP, JPG, GIF or similar. The program also allows the storage of existing single or multi-page PDF documents.

In addition, you can scan in directly from the program choosing the colour type, dpi, type etc.

You should note that images can occupy an equal amount of disk space as the original. Storage has become cheaper with time and large capacity drives are very reasonably priced these days.

It is recommended that you adopt a proper and regular backup procedure for all information.

<u>How does it work?</u>

The secret of a good bibliographic system is that the information can be entered and retrieved easily. All images are stored against a set of **keywords** that can then be used to later retrieve the information.

You could record all the documents relating to a vehicle for example, including the registration document, insurance certificate, MOT and service invoices. To retrieve them you might just use the vehicle registration number. You could hold these in one master record or you could store these documents individually.

In general, if a document has a unique number on it then it is more efficient to hold it in an individual record as searching for the unique number will achieve an instant hit. Ultimately this is up to you.

A good example of when something should be on one record is Liability Insurance. You have to keep certificates for up to 40 years and the certificate number is often the same, so you could hold this under one record.
The design of the way to store records is up to you.

Here is a record –

The individual keywords are listed down the left-hand side.

There are special spaces for unique references, like a certificate number. You can either enter the Keywords directly or you can fill in the Description line and click on [Smash] at the end and it will work out what the keywords are and fill them in for you.

Here I could have entered HISCOX INSURANCE 2017 on the Description line and hit [Smash] - it filled in the Keywords.

I can then search for this record by using any of these words. Note that it will find other instances that contain my keyword.

The Date Added, Time Added and Article number are added automatically.

You add existing images by clicking on [Add]

You scan in new images by clicking on [Scan]

[Refresh] simply refreshes the view.

The box on the right shows the associated Image ID's and a Description.
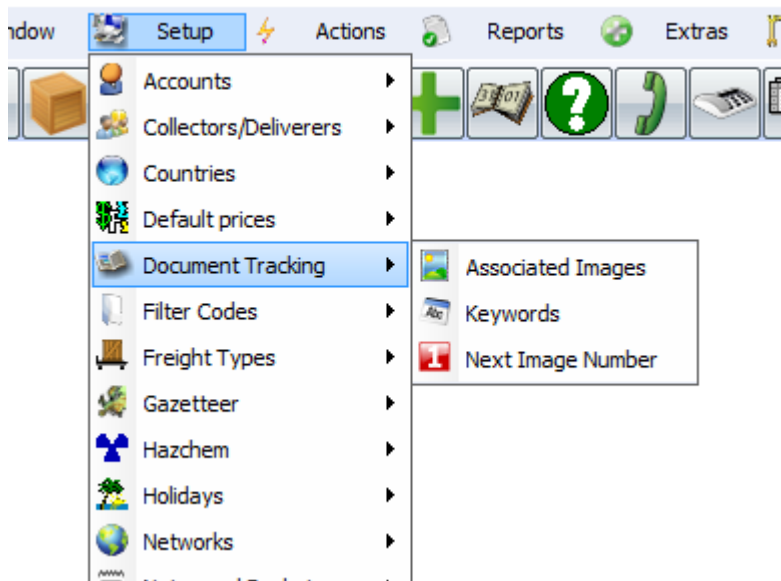
If I double left-click on the top item I get this (with a preview of the document) -

A single left-click on the document takes it back to the previous screen.

A double-right click brings up the document in the associated default program. In this case Adobe Reader as it is a PDF. An image would normally display in Paint.
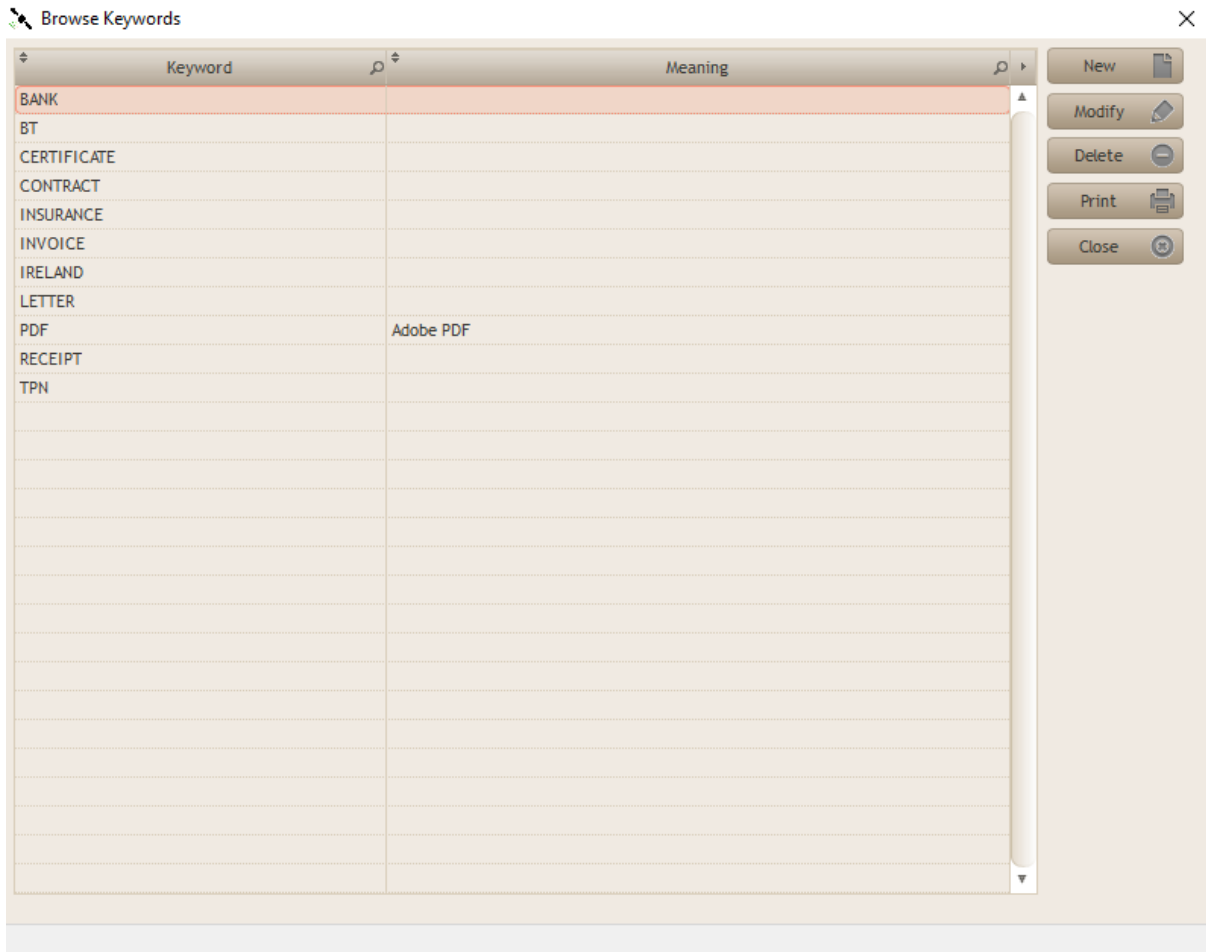
This item appears on the Loadmaster setup menu -

Associated Images allows you to create/amend/delete saved images.

Keywords. You can pre-set commonly used keywords if you want to get a pattern to your storage.

Example -

When you enter Keywords simply think of what words you would use to find something -

- INSURANCE
- 2017
- MOT
- FORD
- LIABILITY
- LEGAL
- MANUAL

You can use anything. It must be something that others can find easily.

You don't need to store Keywords at all but it keeps a set of standard term which may prove easier when searching.

Next image number is automatically set to 1 when it is first used but you can alter this.

Here is the Actions menu -
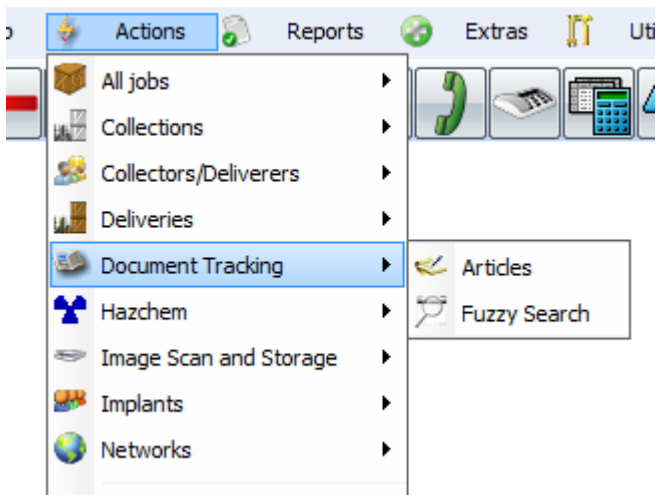
Articles are where you add/amend/delete individual records.

Fuzzy search brings up a subset of Articles relating to search parameters.