

# **TRANSPORT PRO**

Imaging:  
Enterprise

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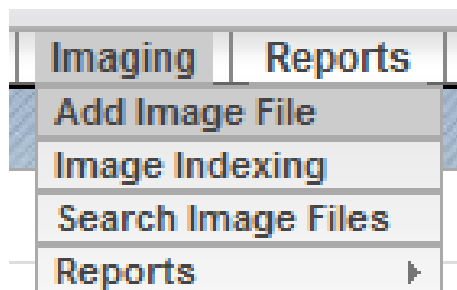
## Imaging

Transport Pro's Imaging component gives users the ability to upload, organize, index, and search files with ease. The system supports high resolution images, significantly reducing communication errors. Transport Pro accepts images from sources such as Transflo and Trippak as well as other scanning solutions. Below is a step-by-step guide that shows you how to utilize the imaging feature of Transport Pro.

### Add Image File

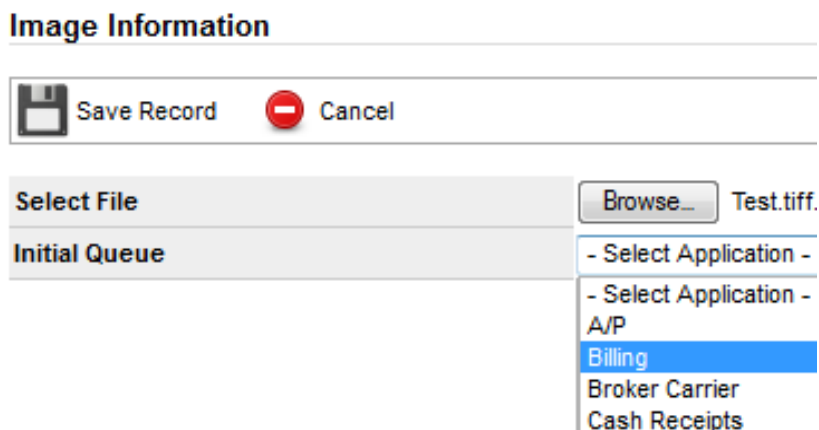
1. Follow the path in the menu Imaging>Add Image File.

**NOTE:** If you are using a scanning solution such as Transflo, you do not need to go through the process of uploading/adding an image. Any scans will automatically be sent to a predefined folder, which is set up upon configuration. If you are using a scanning solution, you can go straight to the image indexing section to locate the correct document.



2. An Image Information window will open. Click the Browse button to upload your preferred document. Then, select the category/folder in which you want to place the document.

**NOTE:** Transport Pro highly recommends that the documents you upload are in a Tiff format (ending with extension .tiff). If you upload an image, you automatically have continued access to that document regardless of any settings. By default, everyone has access to the uploaded documents. If you do not want a user to have access to specific documentation, contact your Transport Pro administrator.

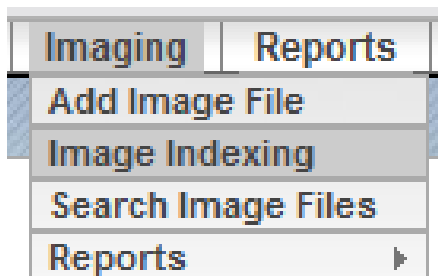


3. Click "Save Record."

**NOTE:** Once you save the document in the correct folder, you can access that document by navigating to the Image Indexing queue.

## Image Indexing

1. Follow the path in the menu Imaging>Image Indexing.



2. A Default Document Queue window will open. To locate the document you saved in the previous step (or files that have been scanned in), choose the correct folder from the Jump to Queue drop-down menu. Once you do this, a Queued Files list will populate on the right-hand side of the screen.

**NOTE:** The queued files that appear are based on the category/folder you have selected from the drop-down menu. Only unread Transflo and Trippak emails can be auto deposited into the corresponding folders. If you open the email(s), the system will assume that those documents have already been indexed.

### Default - Document Queue













Jump to queue: Default - (4) ▼

- A/P - (0)
- Billing - (7)
- Broker Carrier - (1)
- Cash Receipts - (0)
- Collections - (0)
- Default - (4)
- Fuel Tax - (3)
- GL Adjustments - (0)
- Insurance - (0)

Queued Files					
File Name	Size	Pgs	Date	Move	Manage
Billoflading.htm	0.05Mb		01/14/2015 17:02	- Move - ▼	
Billoflading.htm	0.05Mb		01/14/2015 17:02	- Move - ▼	
1392232586715543264.pdf	0.05Mb		03/10/2015 11:08	- Move - ▼	
filename1.pdf	1.84Mb		06/16/2015 15:45	- Move - ▼	

- Once the queued files generate, you have the option to move the desired document to another folder if needed. You also have the option to open, download or delete the selected file.

**NOTE:** To open or download the document, click on the green icon. To delete the file, click on the scissor icon.

Queued Files					
1					
File Name	Size	Pgs	Date	Move	Manage
 Billoflading.htm	0.05Mb		01/14/2015 17:02	- Move -	 
 Billoflading.htm	0.05Mb		01/14/2015 17:02	- Move -	 
 1392232586715543264.pdf	0.05Mb		03/10/2015 11:08	- Move -	 
 filename1.pdf	1.84Mb		06/16/2015 15:45	- Move -	 

- When you locate the correct document or packet, click on it. The document or packet will appear. A column will also appear on the right side of the screen with three categories: Queued Files, Index Module and Document Pages. After opening the document or packet, determine in which index module it belongs and select the appropriate option from the Index Module drop-down menu.

**Queued Files**  
Double-click the header to expand

Index Module

Loads

- Select Module -

System Modules

Agents  
Bank Acct Adj  
Broker Carriers  
Cash Receipts  
Checks  
Claims  
CSA Inspections  
Customers  
Customer Service Request  
Driver Logs  
Drivers  
Factoring Company  
Fixed Assets  
Fuel Ticket  
GL Adjustment  
Incident  
Loads  
Misc Billing  
Owners  
Pending Settlement

Search

Bill of Lading

Customer Quote

Log

Permit

Indexed ID

- After selecting the appropriate option from the Index Module, two new sections will appear: Keyword and Document Types. You must enter content in the Keyword field. For example, if you chose Loads from the Index Module drop-down menu, you would enter the load number in the keyword field. This tells the system which load to attach the indexed documents to. The Document Types section prompts you to select how a document or each page of a packet is categorized. Beginning with page 1, select the correct document type, and continue this process until each page of the packet has been properly categorized. In the example below, you can see that Page 1 is a billing packet, page 2 is a bill of lading and so on.

Keyword

1387

Search

Results

Index	Load	Bill To	Origin	Destination	Pick-up Date	Delivery Date
	1387	Keystone Foods Accounting Center	Madison, AL	Mount Juliet, TN	05/16/2015	05/23/2015

Document Types

Billing Packet	Bill of Lading	Carrier Invoice
Carrier Rate Agreement	Customer Quote	Delivery Receipt
Freight Bill	Log	Lumper
Other	Permit	Rate Confirmation

View other document types

Document Pages

Current Index: Loads - 1387

View Existing Indexed Images

Load 1387 - 6 files indexed

- 1 Delivery Receipt
- 1 Bill of Lading

Page	Document Type	Indexed ID	
Page 1	Delivery Receipt	Loads - 1387	
Page 2	Bill of Lading	Loads - 1387	
Page 3	Bill of Lading	Loads - 1387	

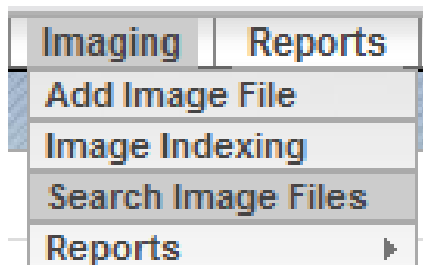
- After you have properly categorized each page, click Save Record.

**NOTE:** The Indexed ID column represents the keyword you entered. In the example above you can see that the Indexed ID is the load number. The keyword field **MUST** be filled out. The system will not allow you to save your information if the Index ID is not set.

## Search Image Files


Transport Pro allows you to search for all image files based on criteria you filter.

1. Follow the path in the menu Imaging>Search Image Files.



2. A Search Images window will open. Filter any desired criteria and then click Search. A list of search results will generate.




### Search Images

Search Images	
Module	- Select Module -
Document Type	- Select -
Indexed By	<input type="text"/> 
Date Indexed	<input type="text"/> 31 To <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Save Search"/>	

### Search Results (2,358)

[Print Results](#)

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | » [95]

	Name	Document Type	Cabinet	Index
	<a href="#">christmaslights21.png</a>	CDL	Drivers	1000
	<a href="#">freightBill1002.pdf</a>	Freight Bill	Loads	1002
	<a href="#">settlement1000.pdf</a>	Settlement Summary	Settlements	1000

- To view an image, click on the desired link under the Name column.

	<a href="#">Print Batch - Freight Bill</a> 02/07/2014 11:13 AM	Other	Billing
	<a href="#">rateConfirmation1391793969.pdf</a>	Carrier Rate Agreement	Loads
	<a href="#">settlement1021.pdf</a>	Settlement Summary	Settlements
	<a href="#">settlement1022.pdf</a>	Settlement Summary	Settlements
	<a href="#">freightBill1042.pdf</a>	Freight Bill	Loads
	<a href="#">139222087659479815.tiff</a>	Delivery Receipt	Loads

- A Preview File Information window will open and display the document or packet. Here, you can download the file, change the document type, enter a report name, report date, and generation date as well as add any notes. After you change or add any information, be sure to click Save Record.

Image File Details		Download file
File Name	139222087659479815.tiff	
File Size	0.03 MB	
Mime Type	image/tiff	
Loaded By	Kenneth Kloeppel	
Reference	Loads - 1057	

ImagePreview

Update



Delivery Receipt

Report Name
Test

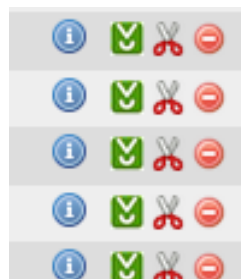
Report Date

Generation Date

Test

 Save Record
 Cancel

**NOTE:** If you would like to view the file information, download the file, delete the index, or delete the image, use the icons located to the right of the appropriate file.

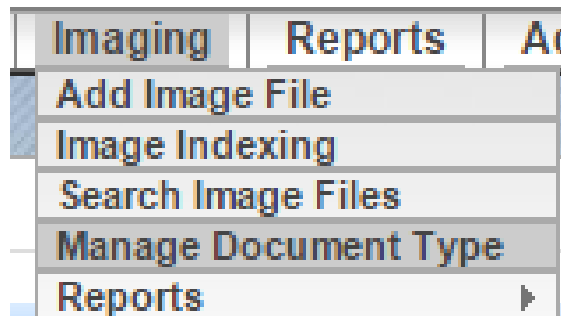




## Manage Document Types

In the case that you need to add a specific document type to a specific category in the imaging system, you can do so with ease. For example, if you need the ability to index an off duty log by applying it to a specific category such as “driver logs” you can create this option if it does not already exist. Please note that if you do not assign the document type to a specific category, it will be available in all of the imaging-related drop-down menus.

1. Follow the path in the menu Imaging>Manage Document Type.



2. An Image Documents page will open. On the left-hand side of the page you will see Applications and Security Groups. The applications represent the categories for which the document types belong. On the right-hand side of the page you will see a section called Current Values. This list represents all of the document types currently available in the Image Indexing sections of the system.

**Applications**

- ☐ Incident
- ☐ Loads
- ☐ Logistic Vendor
- ☐ Misc Billing
- ☐ Owners
- ☐ Pending Settlement


Current Values	
Value	
1056	
1099 Report	
2020 Criminal Report	
2290 Highway Use Tax	
3rd Party Collections	
accounts payable	
Accounts Payable	
ACH	
ACH Direct Deposit Report	
Aged Accounts Receivable	
Aged A/R Report By Revenue Code	
Agent Contract	
Agent Setup Info	


3. You have three options: 1) You can assign a current value to a specific application or multiple applications and/or security groups (see example 1), 2) You can create a new value (document type), which will be added to the Current Value list. Once a new value is added to the list, you can assign it to a specific application and/or security groups (see example 2). 3) You can add any document type you need without assigning it to any applications/groups.

## Example 1

Click on the desired current value. When you click on one of the document types, the name of that document type will appear in the Value field.

Edit Entry

 Save

 Clear

Value

Billing Statement

☐ ACH
 ☐ Accounting
 ☐ Accounts Payable
 ☐ Accounts Receivable

Articles

Attorneys & Legal

Authority

Balance Sheet

Balance Transfer

Bankruptcy

Bank Transactions

Billing Packet

Billing Statement

If the document is already assigned to an application, or multiple applications, the box(es) next to those applications will be checked. Here, you have the opportunity to uncheck these boxes to un-assign the document to those categories, or check the desired application boxes to add that document to that application. The same applies to the security groups. Click Save.

**Applications**

☐

Logistic Vendor

☒

Misc Billing

☐

Owners

☐

Pending Settlement

☒

Recurring Settlements

☐

Recurring Vouchers

☐

Repair Order

☐

Safety

☐

Sales Profile

☐

Settlement Vendors

☐

Settlements

☐

T-Chek

☐

Tractors

☐

Trailers

☐

VM

☐

Vendors

☐

Vouchers

☐

Work Order

**Security Groups**

☐

Accounting

☐

Accounts Payable

☒

Billing

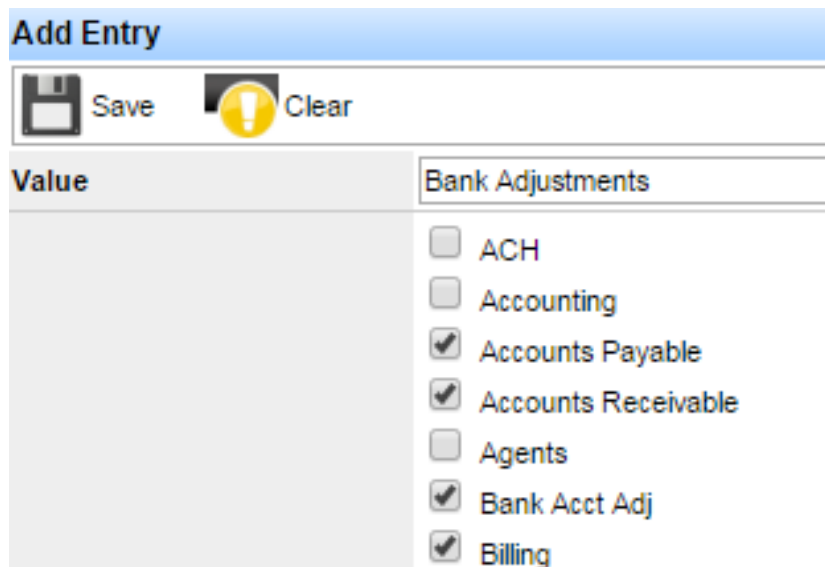
Transport Pro

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## Example 2

If the document type you need is NOT already in the Current Value list, type the desired document name into the Value field. Then, check the application and security group boxes to which you want to assign the document type. Click Save.

**NOTE:** You can add as many document types as you need. You can assign a document type to as many applications or security groups as needed.



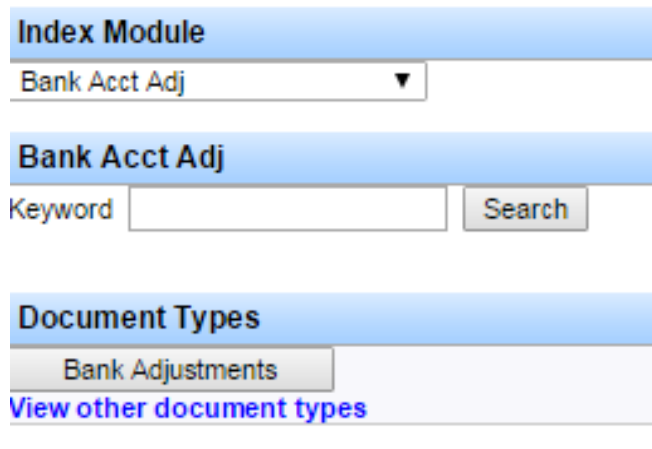
**Add Entry**

Save Clear

Value: Bank Adjustments

- ☐ ACH
- ☐ Accounting
- ☒ Accounts Payable
- ☒ Accounts Receivable
- ☐ Agents
- ☒ Bank Acct Adj
- ☒ Billing

- Once you have all of the document types you need in place, you can utilize them in the image indexing section of the system. In the above example, a new document type titled "Bank Adjustments" was added and assigned to the following applications: Account Payable, Accounts Receivable, Bank Acct Adj, and Billing. The screen shot below shows you how that looks when indexing the document type.



**Index Module**

Bank Acct Adj ▼

**Bank Acct Adj**

Keyword  Search

**Document Types**

Bank Adjustments

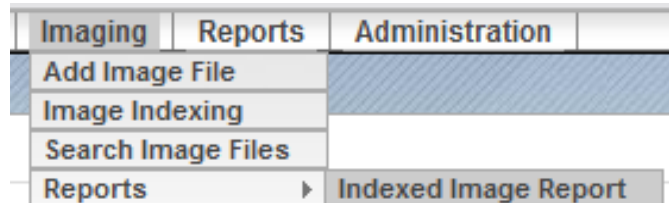
[View other document types](#)

Notice that when you select the application from the Index Module drop-down menu (in this case “Bank Acct Adj”) the document type available is “Bank Adjustments.” Any document types that you have assigned to a specific application will show up in the Document Types section for indexing purposes.

## Reports

Transport Pro makes it easy to search for and access indexed image reports.

1. Follow the path in the menu Imaging>Reports>Indexed Image Report.



2. An Indexed Image report window will open. Filter any desired criteria and then click Get Report. A list of reports will generate.

### Indexed Image Report

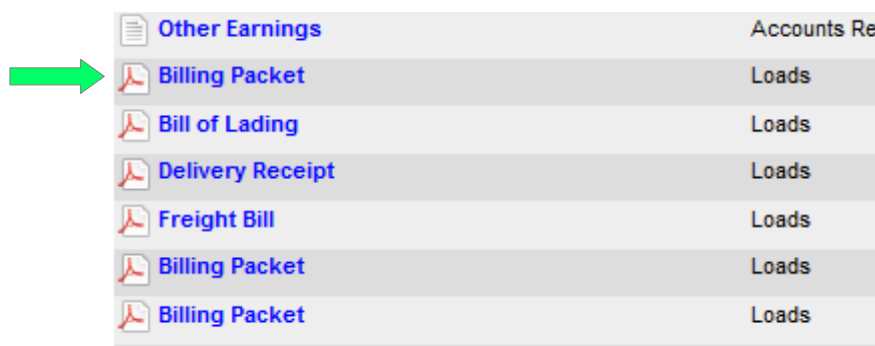
Cabinet	- All Cabinets -
System User	- All System Users -
<a href="#">Get Report</a>	

Report Results  
[Printable Report](#)

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | » [95]

Document	Cabinet	Indexed to
<a href="#">Other Earnings</a>	Accounts Receivable	error
<a href="#">Billing Packet</a>	Loads	1439

3. To view an indexed report, click on the appropriate link in the Document column.



- An Imaging File Information window will open and display the image. The window will also display the image file details and allow you to download or update the file image. After adding any information, click Save Record.

Image File Details		Download file
File Name	billPacket1201.pdf	
File Size	0.00 MB	
Mime Type	application/pdf	
Loaded By	Terry Green	
Reference	Loads - 1201	

Image File Update

Billing Packet

Report Name

Report Date

Generation Date

Billing Packet - 1201

Save Record

Cancel

**NOTE:** To view the file information or download the file, use the Manage icons to the right of the document link.

Manage	
	
	
	