PFT Help

Introduction

Paper File Tracker is a free program designed to do just one thing - help you know where your paper files are located when you want to retrieve them and know where they are supposed to go when you want to put them away.

Read the Basic Concepts for sure, and Using Paper File Tracker for the menu commands and suggestions on how the various fields might be used.

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Installation

To install Paper File Tracker, run the pft-setup.exe program.

Paper File Tracker does not need to be installed in the Program Files folder but can be installed and run from any folder on your computer, including an external drive, a thumb drive or a network drive.

After installation, the selected folder will contain three files: pft.exe, sqlite3.dll and pft.chm, which are the program file, the database library and the help file respectively.

The Paper File Tracker folder can be moved or copied to another computer, and you can then simply create a shortcut to the program file on your desktop or taskbar to launch the program.

The datafile filedata.db is created automatically the first time you run Paper File Tracker.

Basic Concepts

A PAPER FILE is a physical object - it might be a single folder, a file pocket containing a number of folders, a notebook or even some other physical form. It is a container for notes, correspondence, documents, pictures, or other items that you want to keep together for some reason. Perhaps the items all pertain to one client or customer, one transaction, one case, one subject matter. In order to tell this file apart from all your other files, presumably you gave each file a NAME when you created it, and wrote it on the file tab or file jacket.

A LOCATION is where you store a particular paper file. It might be a drawer in a four drawer lateral file cabinet, a shelf in a high density file storage system, or a shelf on bookshelf. The location might be qualified by a room, a building or city. When you know the location, you can easily go there and either retrieve or put away a particular paper file.

Paper File Tracker is a simple database application that lets you CONNECT a PAPER FILE and its LOCATION in your filing system. When you want to retrieve or put away a paper file, you use Paper File Tracker to find its location. The physical file and the physical location are linked to each other through the Paper File Tracker computer file database like this:

Paper file <----> Paper File Indexer database <---> Location

Interface

Paper File Tracker has three basic parts on the screen in addition to the usual Windows menu.

The top part, labeled "Locate a File," is a grid with scroll bars,so you can quickly scroll to the Reference and Filename that you want to find.

The middle part, labeled "Enter / Edit Information," is a panel containing edit boxes. When you Add a record,the edit boxes are empty; when you are editing an existing record, the edit boxes automatically contain the information for the current record selected in the grid. You should click the Save button (or choose the File | Save menu item) as soon as you are finished entering or editing information.

The bottom part, labeled 'View only records containing this text:," lets you search for records containing the text you type in the edit box. Simply type the text in the edit box and click the Go button, and only the records containing the text you typed will be visible in the grid. The search is case insensitive, and the text can be at any position in any field. This is a very powerful tool for locating the desired information. When you are done, simply click the Clear Search button, and all records will once again appear in the grid.

Getting Started

Paper File Tracker is simple by design, but spend a few minutes becoming familiar with the menu commands, and the information about its fields that will make it a truly useful tool!

Menu Commands

The menu commands are very straight forward.

The File menu has two commands, Save and Exit. The Save command writes changes to disk; it is usually more convenient to use the Save button in the field editing panel. The Exit command closes the application.

The Edit menu has three commands, Copy, Cut and Paste. These are the standard Windows operations; it is usually more convenient to right-click and use the context menu.

The Records menu has three commands, Add, Edit and Delete. The Add menu allows you to add information about a new file to the database. The Edit menu is not strictly necessary, since the field editing panel is always in edit mode. The Delete menu lets you delete the selected record. After each of these operations, you must use either the File | Save menu command or the Save button, as changes are not written to disk until you save them.

The Backup menu has two commands, Backup and Restore. Backup allows you make a backup of the current database, filedata.db, which is located in the same folder in which you installed the program. You should back up the database frequently, since if your disk crashes, you can always reinstall the program but if you have not backed up your data, it is just gone. You should back up to an external hard drive or a thumb drive. The Restore menu command lets you restore the backup data file to the program folder. Be careful using restore, as you could easily replace the current data file with an older one! Use it for disaster recovery only!

The Help menu has two commands, Help and About. The Help command launches this help file in the Windows help file viewer. The About command contains the copyright and license for the program.

Reference Field

The Reference field is the highest level of information about the paper file. All files are maintained in order by the Reference field first.

For example, if all files are organized by client or customer, the client's or customer's name would be a good reference field. Then all that client's or customer's files would be grouped together first by Reference and then by Filename.

But the Reference field could be whatever makes the most sense for a particular purpose. It might make sense for the Reference field to be something completely different, like a file number, a department or a subject matter. Paper File Tracker does not force any particular meaning on Reference - it is up to you. Some examples:

Anderson, Pat
2011-00001
Catalogs - Tractor Parts
Water Division

Filename Field

The Filename field is the second level field. Files are maintained within each Reference in order of Filename. For each Reference field, the Filenames are listed in alphabetical order regardless of the order in which they were entered.

The Filename field (or Reference + Filename fields) should EXACTLY MATCH the filename label of the paper file! These are the "links" between the paper file and the database! Some examples for Filenames where the Reference is Anderson, Pat:

Birch Bay Real Estate Purchase 1989
Last Will and Testament
Snoqualmie Falls Brewing Company Corporate Documents (Permanent)

Location Field

The Location field is the description of where the paper file lives.

If for example the only file storage system is one or more four-drawer lateral file drawers, the Location might be the cabinet and drawer.

In a large high density file storage system, with dozens, hundreds or even thousands of shelves, they might be labeled by department and shelf number.

When a file is archived, its location might become the name of the company and the box number.

What is critical is that the physical locations be labeled in some logical manner so that label is the link to the Location entry in the computer database! Examples of Locations:

Drawer 1D
Shelf L055
Iron Mountain Archives Box 225

Comments Field

The Comments field allows you to put any other information that might help you find the particular file you are looking for, or information you might want associated with that file, such as physical format, date opened, or date archived. It is also good for listing individual folders in a file pocket.

It is also a good place to note address and other contact information for clients, customers, or othe people somehow associated with the file, so you can simply copy it from the Comments field and paste it into your wordprocessor.

Here is a sample Comments entry for a file:

File pocket. Contains folders:

- Wetlands Study
- Drainage Review
- Meadowbrook Farm Property Exchange
- Permitting

Northwest Railway Museum
PO Box 459
Snoqualmie, WA 98065

(425) 888-3030

info@trainmuseum.org

Using on a Network

Paper File Tracker can be used on a network. Multiple instances of the program can access the same datafile at the same time. But Paper File Tracker is not a client-server program, and multiple instances of the program cannot both write to the data file at the same time. When two people try to write to the data file at the same time, the program will let you know that the database is busy. Just try again.

A Little Secret

Well, it is not actually a secret, and you probably figured it out already yourself! The Reference and Filename fields are not tied to paper files. You can use Paper File Tracker to track ANYTHING that has a description and a location! Just think of the Reference ands Filename field especially as a generic Name fields. The Location field can contain any kind of information you want to locate whatever you are tracking, whether it is auto parts, books in a small city library, or the content of boxes in a storage unit. These generic widgets all have a description and a location, which you can associate with each other with Paper File Tracker.

Under the Hood

Paper File Tracker was developed entirely with free software tools:

- The Lazarus Integrated Development Environment (with Luiz Americo's Sqlite3dataset component)
  The Free Pascal compiler
  The Sqlite3 database library
  The HelpNDoc help authoring system
  The Inno Setup Compiler