

ARIE Batch

ARIE Batch is a way of filing batches of documents using what is called a Batch Indicator.

A Batch Indicator is a unique word or phrase that you place on a cover page or is a word or phrase already in the content of the first page on your documents. When ARIE sees the Batch Indicator, it refers to the rules you have setup to know where the document should be placed. This ARIE filing method is helpful for filing archived data that is all going into the same folder in PinPoint, but you want them split and filed as separate documents.

From the menu on the left-side of the screen, click Admin, then click ARIE Batch under the column: ARIE Management.

* Cabinet <-- Select Cabinet -->

* Doc Type <-- Select Doc Type -->

* Batch Indicator

* Folder <-- Select Folder -->

Doc Tab <-- Select Doc Tab -->

☐ Keep Cover Page

Search Folder

* Batch Name

☐ Use Workflow Business Rules

* Sub-Divider <-- Select Sub-Divider -->

Template <-- Select Template -->

Save Clear

Doc Type	Doc Tab	Cabinet	Folder	Sub-Divider	Batch Name	Batch Indicator	Keep Cover Page	Template	Use Business Rule	Delete
Invoice		Customers	ABC Company	Invoices	ABC Company Invoice	BATCH15	Yes		No	
Invoice		Customers	Authentic Grains	Invoices	Authentic Invoice	BATCH25	Yes		No	

Add ARIE Batch Rule

1. Select the Cabinet, Folder, and Sub-Divider the documents will be filed to.
2. Select the Doc Type you want the documents filed as.
3. Enter the Batch Name.
4. Enter the Batch Indicator. This is the indicator ARIE looks for within the pages of the documents. The indicator tells ARIE to use this batch rule for filing.
 - If you want to include a Template (zonal capture) with your ARIE Batch rule, you have the option of selecting one per batch rule.
 - If you want ARIE to use your Workflow Business Rules, check the Use Workflow Business Rules box.
5. If you would like to keep the page of the document that contains the batch indicator, check the Keep Cover Page
6. Click the Save button when finished.

Just remember that for every new folder your documents should be filed to within PinPoint, you will need to create a new ARIE Batch rule with a new Batch Indicator. If you are planning on filing several documents at once that all need to go to different folders, we highly recommend using ARIE Multiple instead.

Edit ARIE Batch Rule

To edit an ARIE Batch rule, click the Doc Type from the list of ARIE Batch rules name to open.

When finished making your changes, be sure to click the Save button.

Delete ARIE Batch Rule

To delete an ARIE Batch rule, click the Delete button under the Delete column.