ARIE Named

ARIE Named is very similar to ARIE Direct, though during the setup, you do not pick the folder in which the document will be placed in within PinPoint. ARIE Named uses the name of the document and attempts to match the name against your folders in the cabinet indicated by the rule.

When setting up an ARIE Named rule, you will utilize the Path of the ARIE Named (sub) folders you create within the ARIE Named (parent) folder so ARIE knows where your documents should be filed to within PinPoint. In addition to the path, you will select the Document Type and Document Tab, as well as the Cabinet and Sub Divider (sub divider is just a default in case it is missing in the document name when filed) that ARIE will use when filing these documents into PinPoint.

The naming convention MUST use + signs as separators between the Folder, Sub Divider, and Document Name.

For example, a document name of *ABC+Invoices+Acme Inc.pdf* would result in the document being placed in the designated cabinet indicated in the rule, inside a folder named "ABC", and a sub divider named "Invoices". The document name in PinPoint would be "Acme Inc.pdf", and the rest before that will be removed.

Folders will be created if they do not exist, but sub dividers must already be created, or the document will not file.

You can have as many ARIE Named rules as you would like.

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

Add ARIE Named Rule

1. Select the Cabinet and Sub-Divider the documents will be filed to.
2. Select the Doc Type you want the documents filed as.
3. Enter the Path to the ARIE Named folder you want linked to this rule.
     - If you would like to include a Doc Name Prefix for the documents, you have the option of entering one per rule.
     - If you want to include a Template (zonal capture) with your ARIE Named rule, you have the option of selecting one per named rule.
     - If you want ARIE to use your Workflow Business Rules, check the Use Workflow Business Rules box.
4. Click the Save button when finished.

Edit ARIE Named Rule

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

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

Delete ARIE Named Rule

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