

ARIE Folder Load

Using the Folder Load function, ARIE can add multiple folders to a cabinet for you . Please follow the steps below to prepare a spreadsheet for your folder load. Following these instructions is very important to ensure the correct data is loaded into the correct field.

1. Begin by going to Admin in the user menu, then click the Folders button on the admin Dashboard or below the admin menu.
2. At the Manage Folders page, select the Cabinet you want to load folders to.
3. Review the folder field names. Take special note of the order of the fields and the field types set for each (Text, Numeric, Date Type, Drop-Down, Checkbox). Before loading your folders, you **MUST** make sure the Folder Title field for the cabinet has been set as a Unique field.
4. Now, create the spreadsheet for the folder load (.xlsx, .xlsx, .csv).
 - Across the first row, type each folder field name in a separate column. It is very important that the field names are in the order they appear within PinPoint.
 - Once you have entered all your field names in row 1 in the correct order and spelling, it is time to input the data. This can be done manually, or you can paste the data from another system into your spreadsheet. Each row below row 1 will be a new folder entry into PinPoint (limit of 1,000 rows can be used per load).
5. Finally, once your spreadsheet is ready to be loaded into PinPoint, go to the Manage Folders page, select the Cabinet, then click the Upload Folders button next to the Cabinet dropdown field (2nd button) to upload the spreadsheet.



A few notes:

We highly recommend trying to load only a few folders at first, that way you can ensure everything is going to the right place before loading several at once.

For any field that will be a Date Type, please enter *Date Field* as the column header in row 1, not the actual field name.

For Checkboxes: you will enter “0” or nothing to leave the check off; you will enter “1” for any check you would like on.

For Drop-Down fields, you will need to match the numeric value from a SQL table. If you are on the cloud, contact LSSP for those values. If you host on your own server, please submit a support ticket and LSSP can send you a script to run on your SQL server to retrieve those values.

For instances when “0” may appear as the beginning of a Numeric field: if the “0” is important to the structure of the number (i.e. zip code: 00108 is valid, 108 is not), please make this field a Text field, instead of Numeric. Numeric will eliminate “0” at the beginning of a number.