INTRODUCTION

This guide will go over some of the more advanced topics involved with setting up your database. Every topic discussed in this guide is completely optional for your database – none of the following is required, but all are available within your system.

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DISTRIBUTION RULES

For all ARIE functions, you'll need to be logged in as the admin user, unless you have previously been given permissions. There are multiple ARIE functions, and each one will have a corresponding folder (external from PinPoint) to drop or scan your documents into.

If you are using PinPoint on our cloud, we utilize Dropbox to sync files placed on your end with our ARIE servers. Your Project Manager can share any or all of the ARIE function folders to you at any time.

ARIE Functions

- **ARIE Direct**
  ARIE Direct is the least involved way to automatically file your documents. You'll utilize the path of your ARIE Direct folder to direct the system as to where your document should be filed. Each folder in Windows is linked to a defined location in PinPoint.
- **ARIE Named**
  ARIE Named is very similar to ARIE Direct. The only difference is that during the setup you don't set the folder and subdivider in which the document will be placed. ARIE Named uses the name of the file and attempts to match the name against your folders and subdividers in the cabinet indicated by the rule. If a folder does not already exist, ARIE Named rules will create them upon importing a file.
- **ARIE Native**
  ARIE Native takes document and files it in its entirety as a new document in PinPoint. Documents are filed based on distribution rules.
- **ARIE Multiple**
  ARIE Multiple uses separators to determine where one document ends and the next one begins. Documents are filed based on distribution rules.
- **ARIE Single**
  ARIE Single takes each page within a document and files each separately as a one page document in PinPoint. Documents are filed based on distribution rules.

ARIE Direct

Admin > ARIE > ARIE Direct

ARIE Direct is the least involved way to automatically file your documents. You'll utilize the path of your ARIE Direct folder and any subfolders you may make to direct the system as to where your document should be filed.

The path entered should be the path to the documents on the computer or server running ARIE, and subfolders are ignored.

For example, you can set up a rule that says any document placed into a new ARIE Direct folder will go into my Vendors cabinet, in the ABC Co. folder, under the Invoices subdivider. Doesn't matter the document or the file type, it will always go into this location.

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

ARIE Named

Admin > ARIE > ARIE Named

ARIE Named is very similar to ARIE Direct. The only difference is that, during the setup, you don't pick the folder in which the document will be placed. ARIE Named uses the name of the file and attempts to match the name against your folders in the cabinet indicated by the rule.

Select the path of a folder to be swept, choose a cabinet to be associated with that path, and pick default locations in case information is missing in the filename.

The path entered should be the path to the documents on the computer or server running ARIE, and subfolders are ignored.

File should use + signs as separators between the folder, subdivider, and file name. For example, a filename of ABC+Invoices+Acme Inc.pdf would result in the file being placed in the designated cabinet inside a folder named ABC and a subdivider named Invoices. The filename would be Acme Inc.pdf.

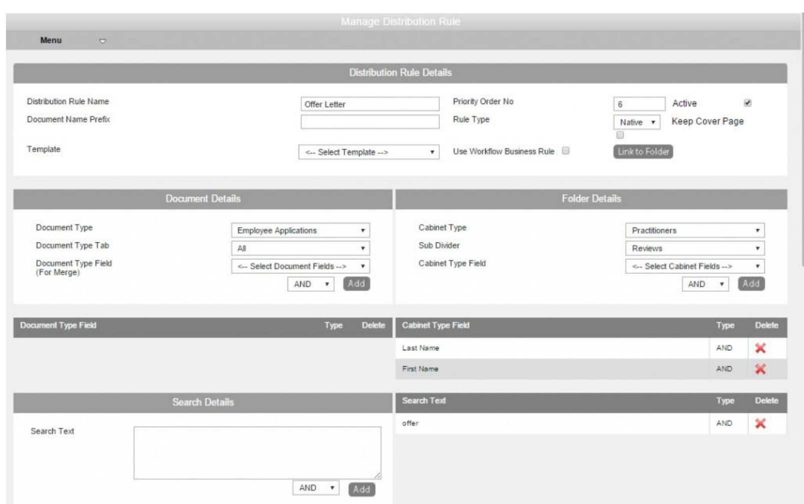
Folders will be created if they do not exist, but subdividers must already be created or the document will not file.

ARIE Native

For an ARIE Native rule, documents must be placed in the location on the server or computer running ARIE as indicated for use with ARIE Native.

Each file placed in the folder will be kept together and filed as one document.

See the section below on Distribution Rules for more information on setting up the options within the rule.



ARIE Multiple

For an ARIE Multiple rule, documents must be placed in the location on the server or computer running ARIE as indicated for use with ARIE Multiple.

Each document placed in the folder will be separated into documents of variable length, with breaks determined by the phrase **BULKMR**.

BULKMR can be placed by itself on a separate, reusable page, or it can be on the first page of each document.

See the section below on Distribution Rules for more information on setting up the options within the rule.

ARIE Single

For an ARIE Single rule, documents must be placed in the location on the server or computer running ARIE as indicated for use with ARIE Single.

Each document placed in the folder will be broken down and each page will be filed as an individual, one-page document.

See the section below on Distribution Rules for more information on setting up the options within the rule.

Distribution Rules

Admin > ARIE > Distribution Rules

The same method is used for setting up ARIE Native, ARIE Multiple, and ARIE Single rules.

Distribution Rule Name: Just a simple name so you know what documents this rule applies to

Priority Order No: This is the sequence number in which the rules will be matched against a document. There may be times when you need one rule to be matched before another to rule it out. For the most part, you can just keep going in a normal sequence (1, 2, 3, 4, 5), but I recommend trying to put your more specific rules (the ones with more qualifications that need to be met) first, to rule those in or out right away.

Active: Make sure this is checked for the rule to be active, or leave the box unchecked if it should not currently be used.

Document Name Prefix: Any document that meets this rule cab be assigned a prefix. Enter the prefix in this box if you would like to assign one.

Rule Type: Decide if this rule will be for a Native, Single, or Multiple. Each rule is associated with only one type, and if you'd like to have the same rule set up for two or more Rule Types, you'll need to recreate the rule for each additional Rule Type.

Keep Cover Page: This only applies to ARIE Multiple - if you check this box, you are saying that the Indicator word (BULKMR) and the information that will tell the system where to put the document are all located on the first page of each new document.

Template: If a template should be associated with this rule, choose it from the drop-down. Templates allow you to pull metadata from predefined coordinates on the first page of any document.

Use Workflow Business Rule: Check this box if a business rule should be associated with this distribution rule.

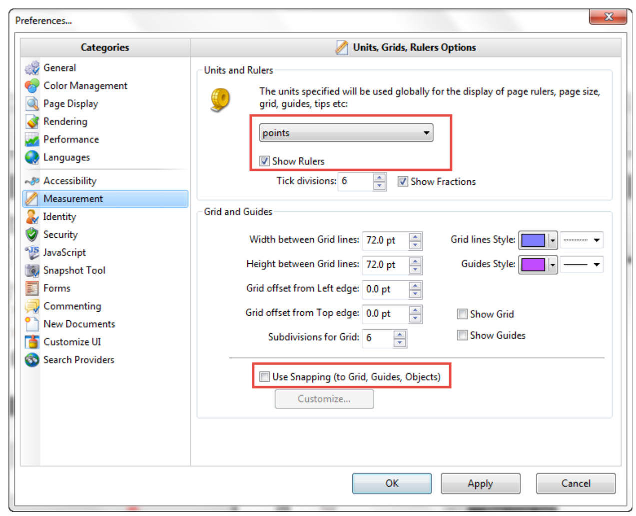
Document Details: This is where you indicate the document type and the document type tab you'd want these documents to be filed under.

Folder Details: This is where you indicate the cabinet and subdivider you would want the documents going into. Cabinet Type Field is where you pick one or more metadata fields that you want ARIE to look for on the document to indicate the folder it should go into. For example, if I added my Vendor Name field, ARIE will need to find a vendor name on the document that matches a vendor name that is part of the metadata for a folder you've added in the system. You can add more than one metadata field using and/or logic, as well.

Search Details/Text: Enter a word or phrase that exists on the first page of the file that will help ARIE match this document to a distribution rule. For example, if I was filing my vendor invoices, I may say that "Invoice" OR "Statement" should be present on the document for the rule to be satisfied. Again, you can use and/or logic.

Once you've added all this information, check to be sure the Active checkbox is marked, and click Save. Your rule is now ready to be used! Always test new rules with a few documents before filing several at once, just to be sure everything is going where it should.

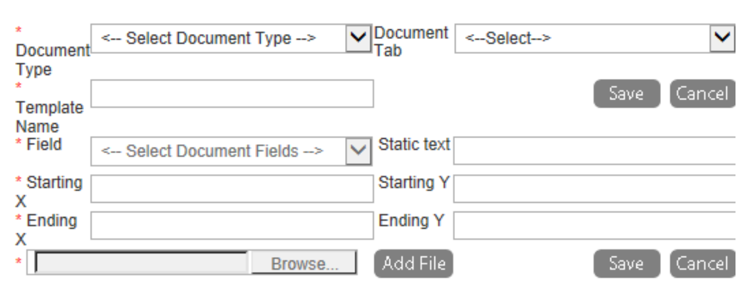
TEMPLATES (ZONAL CAPTURE)



Admin > Setup > Templates

In order to create Templates, the user must be using the PDF Tools (only accessible in Internet Explorer)

1. To start setting up a template, open the **Admin** menu, then click **Setup** and **Template**.
2. **Turn On Grid, Rulers, and Guides**
3. Click on **Edit**, then **Preferences**.
4. On the **Measurements** tab, change the units to **Points,** check the boxes for **Show Rulers, Show Grid,** and **Show Guides.** Uncheck the box for **Use Snapping**.
5. Click **OK**.



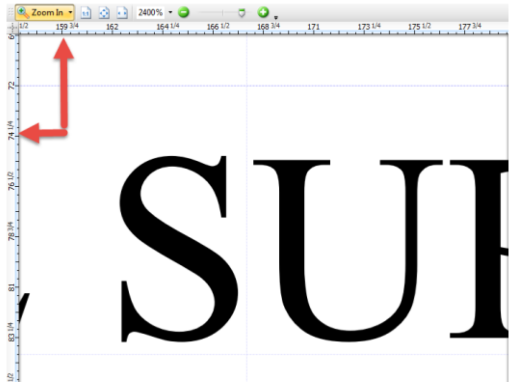
Templates are associated with individual Document Types. For each template you create, choose an associated Document Type and Document Tab.

Enter in a Template Name and click on Save.

Browse to import a document to be used to create the template. Use a document that would be processed using this template. Click **Add File**.

Choose a metadata **Field** that will be filled in by information on the document.

For each **Field**, enter the **(X,Y) coordinates** for the area that should be pulled into the chosen metadata field.



Starting X and **Starting Y** are the coordinates for the **top left corner** of the area of the document to be selected. **Ending X** and **Ending Y** would be the coordinates for the **bottom right corner.**

Use the yellow lines (the **guides**) to help determine the pixel coordinates for the template. The axis on top is the X-axis, and the axis on the left side is the Y-axis.

Use the **Zoom In** tool for more precise measurements.

Enter the coordinates for **Starting X** and **Starting Y**.

The **X coordinates** are on the horizontal axis, while the **Y coordinates** are on the vertical axis.

Do the same procedure for **Ending X** and **Ending Y.**

Click **Save** to finish adding the selected **field** and **coordinates** to the template. After clicking **Save**, you can add additional fields by selecting another **field** from the dropdown and entering the appropriate **coordinates** for that field.

When done adding **fields**, no need to click on anything else, as the template saves each time a new **field** is saved.

As a document is imported into the system through a distribution rule using a template, the fields that were set to be pulled in appear in the **Document Type metadata**.

Adding a Template to a Distribution Rule

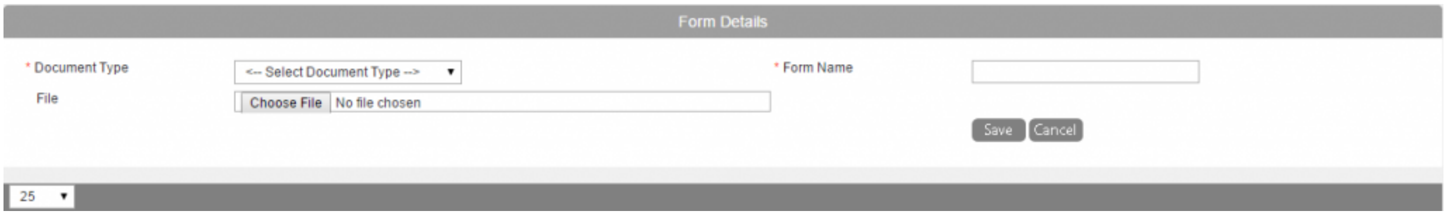
Templates can be used for any distribution rule. On any rule, chose the **Template** you would like to use by selecting one from the drop-down menu.

FORMS

Adding a Form

Admin > Setup > Forms

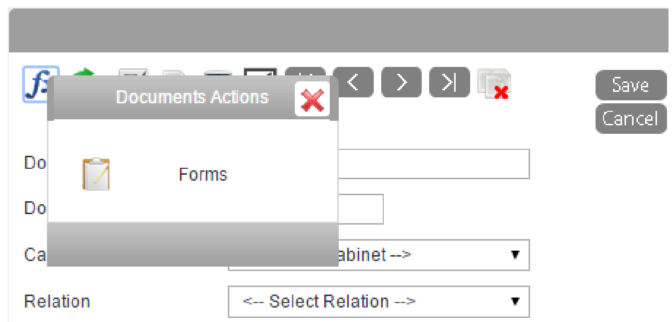
You can add forms to PinPoint as editable PDF's. These forms can then be pulled and completed from the File Single Document screen.



1. First, create your form using an external PDF creator. Adobe is an example.
2. **Select the document Type** this form applies to.
3. Give the form a **Name**.
4. Click **Browse** and upload the form from your workstation.
5. Click Save.

Using a Form

1. **Menu >Filing > Single Document**
2. First, select the **Document Type** that you uploaded the Form to.
3. Click the **Fx** icon, then click **Forms**.
4. **Select** the Form you'd like to open and the form will appear in the document view, and is able to be completed.
5. Once you have completed the form, finish completing the other document details for filing, then click **Save**.



LOADING FOLDERS

ARIE can assist in creating multiple new folders automatically. Please follow the steps below to prepare a spreadsheet to load. Following these instructions is very important to ensure the correct data is loaded into the correct field.

1. First, open PinPoint and look at the Cabinet Type Details (also referred to as Folder Details) for the Cabinet these folders should be loaded into. You'll want to take special note of the order of the fields and the field types of each (Text, Numeric, Date Type, Checkbox)

Then, start a spreadsheet (.xlsx, .xlx, or .csv only) to enter the folder details for all your new folders.

1. We highly recommend trying to load only a few folders at first using the spreadsheet. Then, you can ensure everything is going to the right spot before loading several at once.
2. Across the first row, type each Field Name in individual boxes. The Fields Names do not have to be exact, **but it is very important that the Field Names are typed in the order they appear in PinPoint.**
3. Save the spreadsheet to the location indicated for use with Folder Load. The name of the spreadsheet must match the name of the Cabinet you are loading to exactly. For example, if your Cabinet is Vendors, the filename should be Vendors.xlsx (or .xls/.csv). In this example, Vendors-New.xlsx would not load.

	A	B	C	D	E
1	Vendor Name	Vendor Contact	Vendor Address	Date Field	
2	ABC Company	Joe Smith	123 Main Street Anywhere, IL	04/15/2014	
3					
4					

A few notes:

For any field that will be a Date Type, please enter **Date Field** as the column header, not the Field Name.

For any field that will be a Drop Down, please enter **Drop Down Field** as the column header, not the 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 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.

Finally, if you find that you don't want or need all of the fields that you see in PinPoint, it is still important that there be a column for that field. You can, however, leave the column blank (as long as the column header is present).

Once you have entered all your Field Names in Row 1 in the correct order, it's time to input the data. This can be done manually, or you can export the data from another system into your spreadsheet. Just make sure the data all lines up correctly. Each row will be a new folder entry into PinPoint.

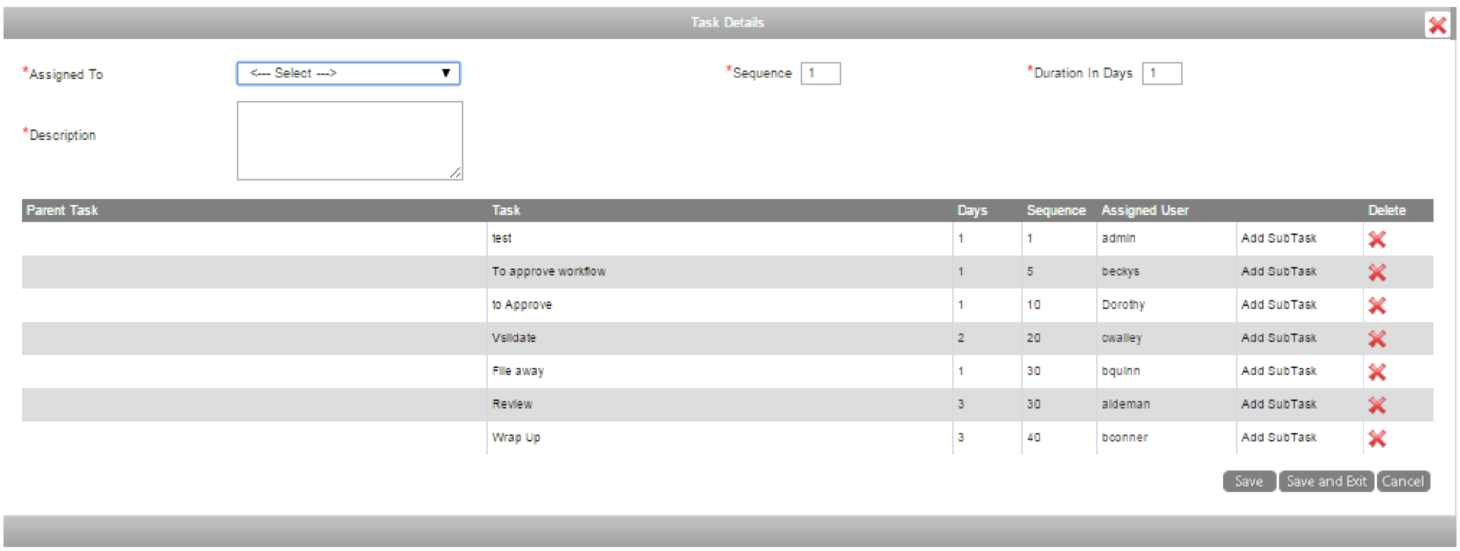
WORKFLOW

Creating Workflow

Admin > Workflow > Manage Workflows

Managing a workflow means the building of the workflow task details for your specified users to complete. Workflows are assigned automatically to specified users once they are added to the specified document type. Workflows can also be overridden at the File/Review screen (Menu>Filing>Single Document).

1. Begin by typing in a name for this workflow.
2. Select a supervisor
3. Enter the workflow description.
4. Click the Save button.
5. Click on the workflow you just Saved, you will notice there is a new button called **Task Details.**



Task Details

*Assigned To <--- Select ---> *Sequence 1 *Duration In Days 1

*Description

Parent Task	Task	Days	Sequence	Assigned User		Delete
	test	1	1	admin	Add SubTask	
	To approve workflow	1	5	beckys	Add SubTask	
	to Approve	1	10	Dorothy	Add SubTask	
	Vslidate	2	20	cwalley	Add SubTask	
	File away	1	30	bquinn	Add SubTask	
	Review	3	30	aldeman	Add SubTask	
	Wrap Up	3	40	bconner	Add SubTask	

Save Save and Exit Cancel

1. First, assign the user for this opening task.
2. Determine the sequence number, along with the duration in days the user has to complete the task. *Please note we suggest starting the sequence number higher than 1, as this will enable you to update this workflow with tasks earlier than the very first. Leaving space between the sequence numbers enables that (i.e. sequence numbers 5, 10, 15, 20, etc.)*
3. Enter the task Description for the specified user.
4. Repeat steps 1-3 for each user in the given workflow. If you have another task to enter, add another task and continue to save.**Remember to update the sequence number.**
5. After you've completed creating the task details, click the Save button.

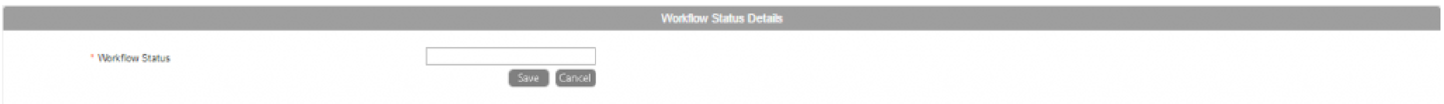
Subtasks

Before we talk about subtasks, let's explain what that term means in the system. When a task is assigned to you, the system will notify you, and the task will be placed on your list of workflows to complete. Once you've completed the task, it goes on to the next person(s).

Tasks can be sequential (one after another) or lateral (one task given to multiple users). To use the lateral task, you will create subtasks.*Please be aware you add subtasks to the parent task, but not subtasks to subtasks* ***unless that's your intent***.

Please Note: A task cannot be moved to the next task if there are subtasks involved that are not complete. Once those subtasks are complete, the task can then be moved onto the next person(s).

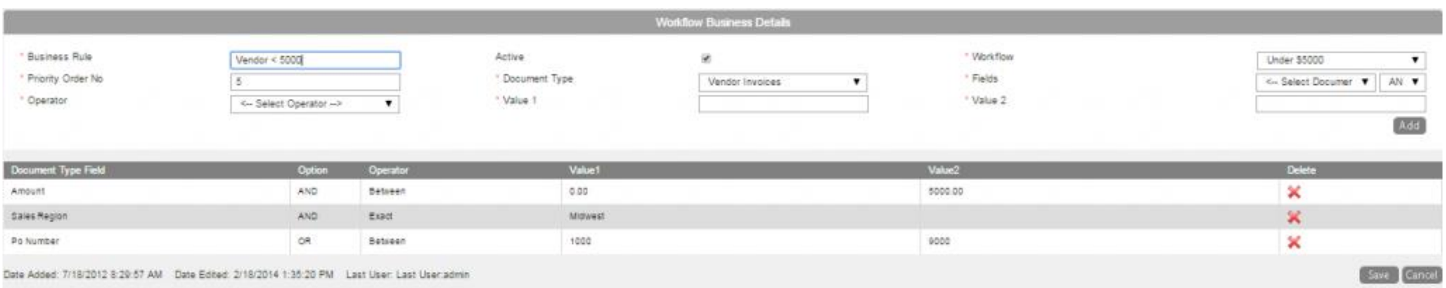
Another parameter file that you can build on is referred to as the workflow status. The workflow status gives you the ability to use a drop-down box during workflows to update the status. This table is defined by you for the entries you require. To access this page, click on **Admin> Workflow > Workflow Status.**



Workflow Business Rules

Here, we display the workflow business rules screen, where a user can check a box for The System to process a workflow by sorting through the workflow business rules you create.

Business rules tell the system to check the metadata for specified values. Those values, if they exist in the document, will trigger a particular workflow to begin. In this example, we show that if one of the fields of metadata contains the customer name (presumably the last name) and if the first character of the last name begins A through E, then this particular workflow process would take effect. The user requiring the document or wanting to process the document can select the checkbox to have the workflow checked against the workflow business rules to process.



Managing Workflow

Workflows > My Workflows

The My Workflow screen is used to show all documents the user has waiting in a workflow to complete.

Users can search by Workflow and/or when his/her task is due to find a certain document or a group of documents. Users can also use OCR and Metadata to locate a specific document.

Simply click on the document name to open it, and you can complete your workflow task you normally would.

To complete multiple Workflow Tasks:

1. Select the tasks you would like to complete.
2. Click the Fx button located above all of the rest.
3. Click Complete Workflow.

To change the status of multiple Workflow Tasks:

1. Select the tasks you would like to change the status for.
2. Select the new Status for the workflow tasks.
3. Click the Fx button above all of the rest.
4. Click Change Status.

Completing a Workflow

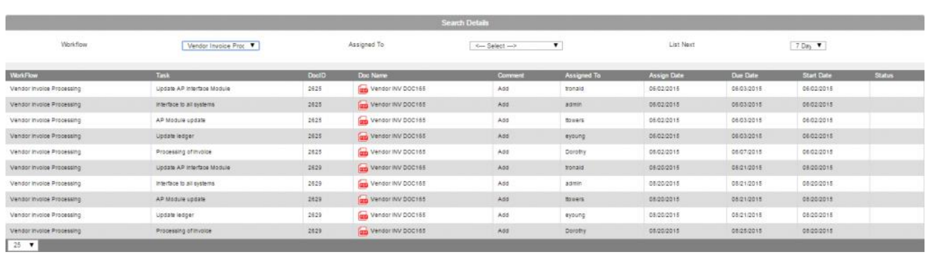
In order to complete your workflow, the user must first begin the workflow task assigned to him/her. To do so, click on the yellow icon in the same column as the workflow task you would like to start. Once the user completes his/her workflow task, the document is sent on to the next person in the sequence order. Once you have completed your task in a workflow, it is critical that you mark the task as completed so the workflow can continue on.

To complete a workflow task:

1. If you are using the Regular Dashboard, simply click on the file name under the "Workflows" section to open the document. If you are using the My Workflow screen, simply click on the file name to open the document.
2. Once you have completed your task, navigate back to the Regular Dashboard, then click on the yellow/red icon to complete your workflow task (users can also go to My Workflows – Menu > Workflows > My Workflow).
3. From My workflows, you can either complete one workflow task at a time, or complete multiple workflow tasks at once. To complete multiple at once, select the workflow tasks you'd like to complete, then select the top FX icon and click Complete Workflow. This will complete all selected workflows from your My Workflow screen. If you want to complete one at a time, simply click the FX icon in the same column as the workflow task you would like to complete.

Supervisor Workflow Management

Workflows > Supervisor Workflows



Search Details

Workflow: Vendor Invoice Proc | Assigned To: <— Select —> | List Next: 7 Day

WorkFlow	Task	DocID	Doc Name	Comment	Assigned To	Assign Date	Due Date	Start Date	Status
Vendor Invoice Processing	Update AP Interface Module	2625	Vendor INV DOC165	Add	tronald	06/02/2015	06/03/2015	06/02/2015	
Vendor Invoice Processing	Interface to all systems	2625	Vendor INV DOC165	Add	admin	06/02/2015	06/03/2015	06/02/2015	
Vendor Invoice Processing	AP Module update	2625	Vendor INV DOC165	Add	ttowers	06/02/2015	06/03/2015	06/02/2015	
Vendor Invoice Processing	Update ledger	2625	Vendor INV DOC165	Add	eyoung	06/02/2015	06/03/2015	06/02/2015	
Vendor Invoice Processing	Processing of invoice	2625	Vendor INV DOC165	Add	Dorothy	06/02/2015	06/07/2015	06/02/2015	
Vendor Invoice Processing	Update AP Interface Module	2629	Vendor INV DOC165	Add	tronald	08/20/2015	08/21/2015	08/20/2015	
Vendor Invoice Processing	Interface to all systems	2629	Vendor INV DOC165	Add	admin	08/20/2015	08/21/2015	08/20/2015	
Vendor Invoice Processing	AP Module update	2629	Vendor INV DOC165	Add	ttowers	08/20/2015	08/21/2015	08/20/2015	
Vendor Invoice Processing	Update ledger	2629	Vendor INV DOC165	Add	eyoung	08/20/2015	08/21/2015	08/20/2015	
Vendor Invoice Processing	Processing of invoice	2629	Vendor INV DOC165	Add	Dorothy	08/20/2015	08/25/2015	08/20/2015	

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When you are a supervisor of a workflow, you can monitor progress of each document involved on this screen. Search by workflow name, user, and/or due date, and you can see which user currently has each document and when their task is due. You can also add comments that the current assigned user will see.

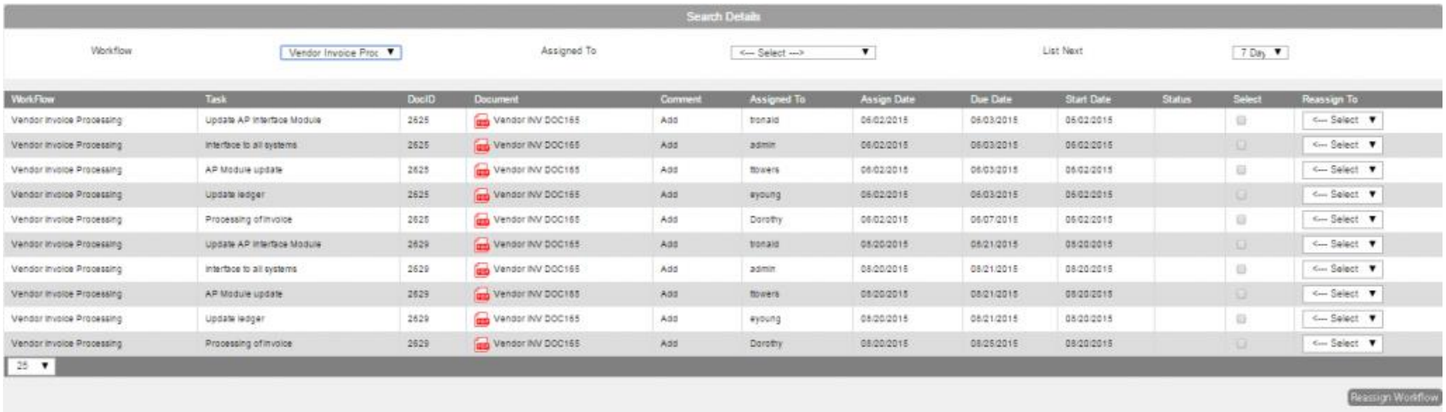
Reassigning Workflow

Workflows > Reassign Workflows

Use this function to reassign a workflow task to another user. You can search by workflow, who a task is currently assigned to as well as a List option to show a range of workflows.

To reassign a task to another user:

1. Click the Select checkbox next to the original user.
2. Then choose a new user from the dropdown menu.
3. Click Reassign Workflow.


Search Details

Workflow: Vendor Invoice Proc · Assigned To: <-- Select --> · List Next: 7 Day

WorkFlow	Task	DocID	Document	Comment	Assigned To	Assign Date	Due Date	Start Date	Status	Select	Reassign To
Vendor invoice Processing	Update AP Interface Module	2625	Vendor INV DOC165	Add	tronald	06/02/2015	06/03/2015	06/02/2015			<-- Select
Vendor invoice Processing	Interface to all systems	2625	Vendor INV DOC165	Add	admin	06/02/2015	06/03/2015	06/02/2015			<-- Select
Vendor invoice Processing	AP Module update	2625	Vendor INV DOC165	Add	flowers	06/02/2015	06/03/2015	06/02/2015			<-- Select
Vendor invoice Processing	Update ledger	2625	Vendor INV DOC165	Add	eyoung	06/02/2015	06/03/2015	06/02/2015			<-- Select
Vendor invoice Processing	Processing of invoice	2625	Vendor INV DOC165	Add	Dorothy	06/02/2015	06/07/2015	06/02/2015			<-- Select
Vendor invoice Processing	Update AP Interface Module	2629	Vendor INV DOC165	Add	tronald	08/20/2015	08/21/2015	08/20/2015			<-- Select
Vendor invoice Processing	Interface to all systems	2629	Vendor INV DOC165	Add	admin	08/20/2015	08/21/2015	08/20/2015			<-- Select
Vendor invoice Processing	AP Module update	2629	Vendor INV DOC165	Add	flowers	08/20/2015	08/21/2015	08/20/2015			<-- Select
Vendor invoice Processing	Update ledger	2629	Vendor INV DOC165	Add	eyoung	08/20/2015	08/21/2015	08/20/2015			<-- Select
Vendor invoice Processing	Processing of invoice	2629	Vendor INV DOC165	Add	Dorothy	08/20/2015	08/25/2015	08/20/2015			<-- Select

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Reassign Workflow

VARIABLE NAMING

Admin > Setup > Variable Naming

Variable Naming allows for a standard naming convention to be assigned to specified Document Types. You can select from 11 different items in any particular order that will be applied as the document name once filed into the system.

1. First, give your Variable Name a name.

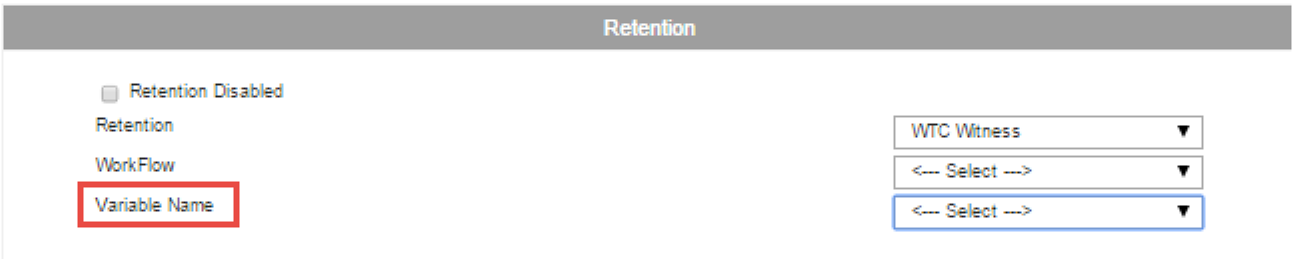
2. Decide which variables you would like to include, as well as the order they should appear in the document name. Hard Code is a variable that will be the same, no matter the document. All others will vary, depending on the document.

3. Using the Drop-down menus, add your variables (Document Type, Folder, User, etc..) and select the sequence number for each (which order it will display in the document name).

4. Click Save once completed.

To add a Variable Name to a particular document type: Admin > Setup > Document Types.

1. After you create a new document type, or choose an existing one, scroll down to the Retention section located in the bottom left of the screen.
2. Using the Variable Name Drop-Down menu, select the appropriate naming convention for the specific document type.
3. Once you have selected the correct Variable Name, click Save.



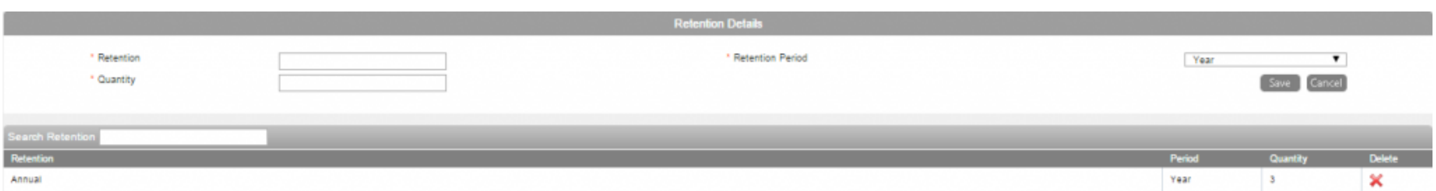
RETENTION

Admin > Setup > Retentions

Records Retention and Purging is defined based on your record guidelines.

1. Give your Retention a name.
2. Select the Retention Period.
3. Enter the Quantity
4. Click Save.

Below the Retention Details, you will see the list of your existing retentions.



To add a retention to a particular document type: Admin > Setup > Document Types.

1. After you create a new document type, or choose an existing one, scroll down to the Retention section located in the bottom left of the screen.
2. Using the Retention Drop-Down menu, select the appropriate retention schedule for the specific document type.
3. Once you have selected the right retention schedule, click Save.

DOCUMENT/FOLDER RECOVERY

Folders cannot be deleted if documents currently exist in them, or if there are documents at the Recover Documents screen that can be restored to that folder.

Admin > Recovery > Documents

1. Documents that have been logically deleted by a user can be recovered by the admin (or a user with the correct permission).
2. For documents, use the Search Details to help narrow down your search.
3. For an individual document, use the "select" checkbox or "recover" icon for that specific document.
4. For a group of documents, select all you would like to, then use the recover icon toward the bottom of the screen on the left.

Admin > Recovery > Folders

1. Folders that have been logically deleted by a user can be recovered by the admin (or a user with the correct permission).
2. For an individual Folder, use the "select" checkbox or "recover" icon for that specific folder
3. For a group of folders, select all you would like to, then use the recover icon toward the bottom of the screen on the left.