

AIM+ Batch Tracking

Overview

You can move one or more files from one file tracking location to another, update file(s) status, and add file notes using Batch Tracking. When you move a file from one location to another, AIM+ records a file tracking history record for each file that was moved to the selected target tracking location.

Note: An asterisk (*) indicates a required field or selection.

Steps

1. From the *File* menu, click **Batch Tracking**. Or you can click the **Batch Tracking** icon  from the *File Tracking* screen.

Note: You can also use **Ctrl+B** to access **Batch Tracking**.

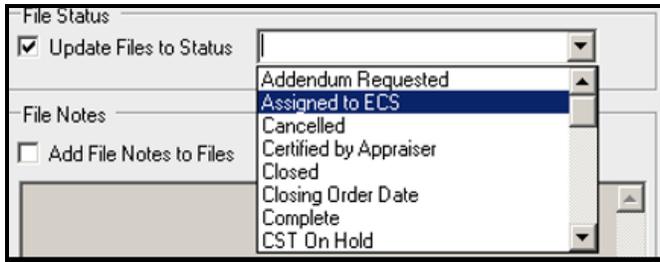
2. On the **File List** section, you can use the following fields:
 - **File Number**— Enter a valid file number. You can add any number of files using the **Add** button.
 - **Add**— Adds the file number to the **File List**.
 - **Remove Selected**—Removes selected files from the **File List**.
 - **Clear List**— Clears the **File List**.



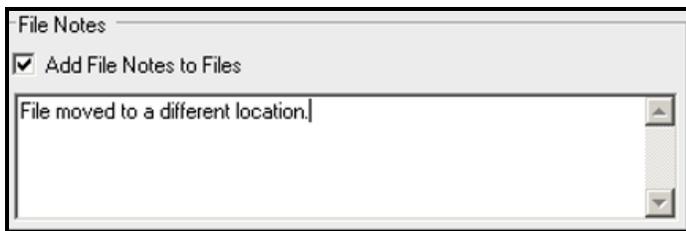
3. Select the **Update File Status** check box to enable **Update File Status** drop-down.

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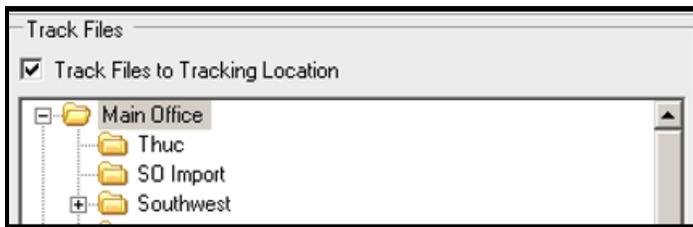
- Choose the **File Status** from the drop-down.



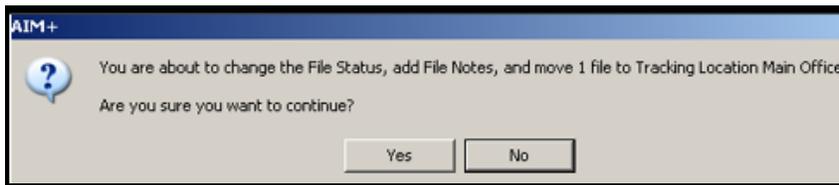
- Select the **Add File Notes to Files** check box to add file notes. Enter the notes in the **File Notes** text field. Select the **Add File Notes to Files** check box to add file notes. Enter the notes in the **File Notes** text field.



- Select the **Track Files to Tracking Location** check box to enable **File Tracking**.
- Select the file tracking location.



- A message displays confirming if you want to continue. Click **Yes**.



- The files are moved to a new location.

Note: You can use **Batch Tracking** to perform any of the action mentioned above. For example, you can add file notes without moving files.