

Introduction

To get started and begin adding documents to your system, you will need to have users, security groups, an initial structure to add to, and a document type.

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Users and Security Groups

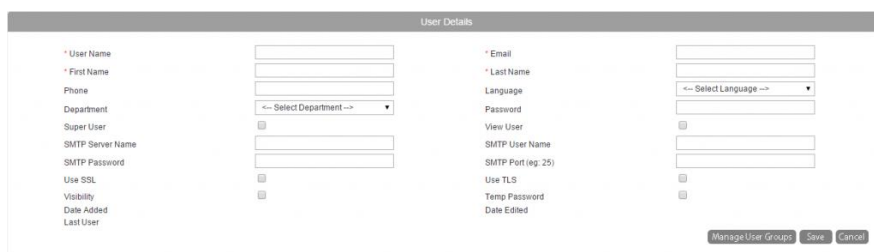
When your database has just been created, only one user account exists: the system “admin” account. The admin account has full rights to the system and can add users and security groups.

Security groups have their own set of access and permission levels, and individual users within those groups can have more personalized permission levels. Users must belong to at least one security group to access the file room, though users can belong to multiple security groups as well.

Adding Users

Admin > Security > Users

When creating a user, there are five fields that are required: **User Name, Email, First Name, Last Name, and Password.**



Passwords must be at least 8 characters and include at least one of the following:

- Uppercase letter
- Lowercase letter
- Number

You will also notice the optional **Department** and **Language** drop-down boxes. The department and language information will only show in the User Details screen and is only used as a description on the user profile for your administrators.

Notice the box referred to as **Super User**. By clicking on this box, the user will have access to all cabinets, folders and document types within the file room. When super users log in, if they are in multiple groups, then they will have the security rights of whichever group they login as.

You will also notice a box referred to as **View User**. If you check this box, the user will be directed immediately to the Gallery View, which is the only screen the user has access to for viewing documents you allow.

Towards the bottom you will notice that there are fields such as **SMTP User Name, SMTP Server Name, SMTP Password and SMTP Port**, as well as an **SSL** and **TSL** box. If you elect to allow this user to send emails from the system, then you will need to input the SMTP User Name and SMTP Server Name. This is most likely the same email as above, but the email shown above in the user details is used when the administrator needs to send the password or other information and notifications. You can find your SMTP settings within your email account.

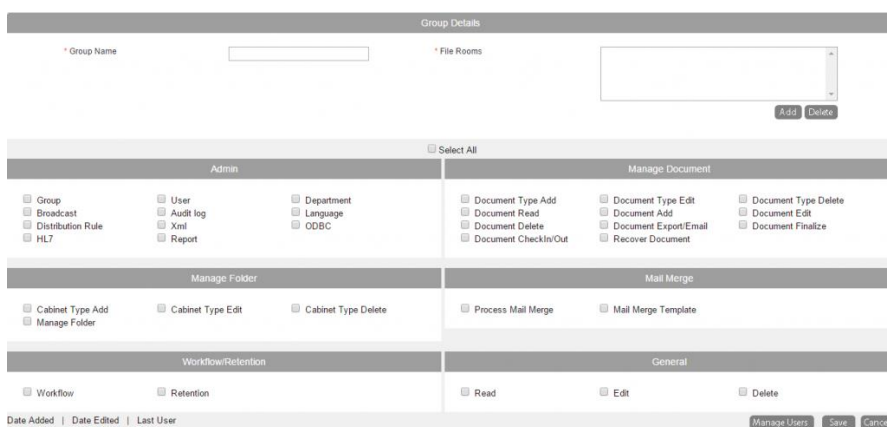
If this user has the same SMTP port for outbound email and server name shown here, then the only information that is needed is the SMTP Password and SMTP User Name. If this user is using something different (Ex. Gmail instead of their work e-mail), then that user will have to additionally fill out the SMTP server name and port and, potentially, the SSL settings. **These settings can be found by contacting your email service provider or IT department. LSSP does not have any information regarding your SMTP server, port, user name, password, and security requirements.**

Adding a Security Group

Admin > Security > Groups

Begin by typing in a group name and selecting or adding the file room(s) that the group will need access to.

Before a user can successfully login, they need to belong to a user group that has been assigned to a file room.



The settings to select below are for your users as their default based on the group they belong to, **but each user can have their own settings within the group.**

Let's discuss each of the items. Under the **Admin** section, you can set a user to be able to access and update those administrative functions that are essential.

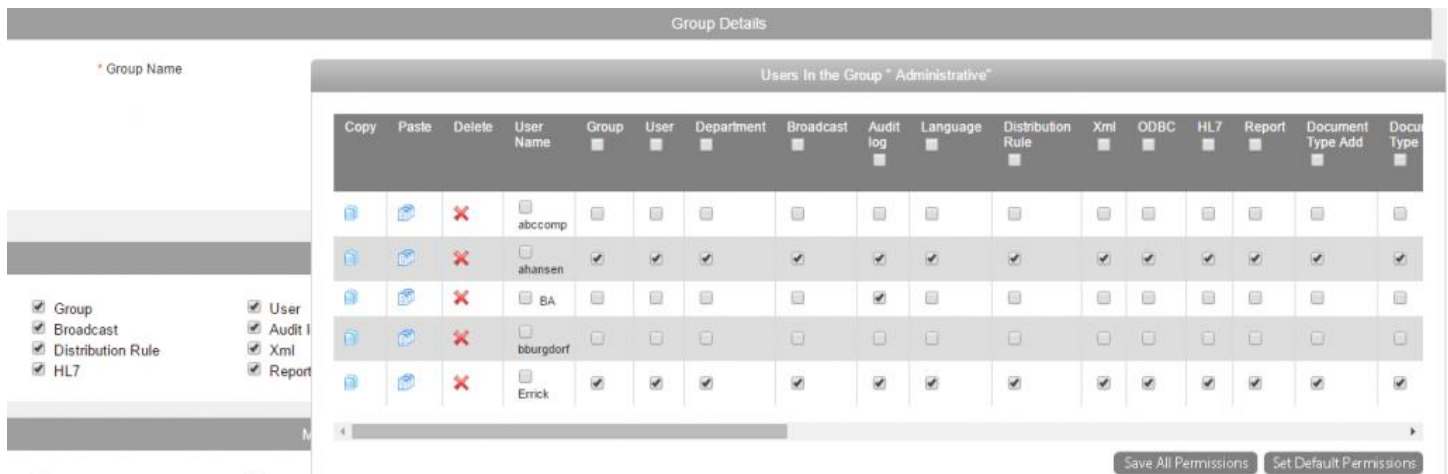
In the bottom right corner, there are options for read (add), edit, and delete. If this group will have default settings, which can then be changed according to user, then any settings that you mark under **Admin**, you will also need to mark whether they can just **read (add), edit, and/or delete**. Those functions, listed under **General**, also apply to workflow, retention, as well as mail merge template and manage folder.

You'll also notice that there is a **Manage Document** section that has functions such as add, edit, delete, read, export, check-in/out, and finalize; those are specific to the document handling.

In **Mail Merge**, there are two options. If you elect this group to produce mail-merge letters, then they should be allowed to Process Mail Merge. If they are to build mail-merge templates, then the mail merge template box would be checked.

Under **Workflow/Retention**, you decide whether or not the user has the ability to add/change workflows and retention settings.

Once again, remember, these will be the *default settings for the group*, but you can override all rights at the user level when you are ready.



Copy	Paste	Delete	User Name	Group	User	Department	Broadcast	Audit log	Language	Distribution Rule	Xml	ODBC	HL7	Report	Document Type Add	Docu Type
			abccomp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			ahansen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			BA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			bburgdorf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			Ernick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once you have established the group permissions and saved, you can reopen the group and click on **Manage Users**. You can now add users to the group and change the security allowances from default to the specific needs for individual users within that group. You can use the top column above the names or to the left of the names to include or not include that column. "Save All Permissions" when you are finished.

PinPoint File Structure

The screenshot displays the PinPoint file structure. On the left, a tree view shows folders: Employees (Cabinet), Alatorre, Shawn (Folder), Application (Sub-Divider), Background Information (Sub-Divider), Other (Sub-Divider), and Reviews (Sub-Divider). On the right, a table lists documents with columns: Action, DocID, Document, Document Type, Tab, Status, First Field, Second Field, Third Field, Document Date, and Entry Date. Two rows are visible: DocID 1204 (Test Doc, Employee Review, 2014, Checked In) and DocID 1205 (Updates 3.docx, Employee Review, 2017, Checked Out). Red arrows highlight the hierarchy levels and specific table columns.

File Room (Database): Think of your PinPoint database as a physical file room. As your file room, PinPoint becomes your central repository to store and organize all your documents, no matter what file type. Each PinPoint database is an MS SQL database and will grow just as you do.

Document Type: Every file that gets saved in PinPoint is labeled by “document type”, and can be placed into any authorized location within your sub-dividers (3rd folder level). Document types will have security set on them, and are used globally (can be placed within any location the user has access to). Document types also have “metadata” assigned to them (document detail fields). These “index” fields will be used to help identify/locate a specific file within your system. For instance, if you built an “Invoice” document type, some examples for document metadata could be, Invoice Number, Due Date, Amount Due, etc. Document types can also have workflow assigned to them, naming conventions and/or retention if needed (all built-in).

Document Tab: Each “document type” you build will have its own “tabs” to use as another layer to further organize your files. For example, you might have a document type called, “Invoices”. To separate invoices even more, you might have a document tab of “Paid” and “Unpaid” when searching for invoices, or possibly “tabs” for each of the years the invoices fall under.

Cabinet: The 1st folder level inside the PinPoint file room is the cabinet layer. Cabinets are the “subject” matter for the folders (2nd folder level) you store within (cabinets can hold an unlimited number of folders). New cabinets can be added/edited at any time by an authorized user.

Folder: The 2nd folder level inside the PinPoint file room is the folder layer. Each folder will have “sub-dividers (3rd folder level) attached to them, which serve as the “colored tabs” you would use on a manila folder. Each folder will also have specific “metadata” (folder detail fields); folder metadata is more easily thought of as your folder “attributes/demographics”. For instance, if you built an “Employees” cabinet, and had a folder for each employee within that cabinet, some examples for folder metadata could be, Employee Name, Employee ID #, DOB, SSN, Address, Contact Info, etc.

Sub-Divider: The 3rd folder level inside of the PinPoint file room is the sub-divider layer. Sub-dividers are used to “divide” the documents within a folder. Think of sub-dividers as the “colored tabs” you would use on a manila folder. Sub-dividers provide a level of organization for your documents to be “categorized” within your folders. For example, in an employee folder, you might have sub-dividers such as the Month/Year, Correspondence, Background Information, Other/Misc., Application Documents, Forms, etc. Your sub-dividers are simply for organizing your documents within a folder for easier access and retrieval. If you do not need multiple sub-dividers, you can create one that simply says ALL or DEFAULT. When building a cabinet, sub-dividers can be assigned to all folders in the cabinet by default, or can be assigned as “unique” sub-dividers to an individual folder within the cabinet, as well. At least one sub-divider is required per cabinet.

Creating a Cabinet

Admin > Setup > Cabinet Types

Click the "Add" button to start, then type in the name for your cabinet. Be sure to name your cabinet something that clearly describes what kind of information will be stored (i.e. Vendors, HR, Forms, Archive, Personal, etc.).

Add any "Description" or "Notes" you feel relevant for other administrators to view when they are on the Manage Cabinet screen.

Under "Field Name", you must add at least one folder detail field:

- One folder field must be marked as the "Folder" field. You can only have one "Folder" field per cabinet, and it has to be a "Required" field; this is going to be how users identify the folder when searching.
- If you uncheck the "Visible" box, the value that gets filled in for the field is confidential and only visible to those who you allow to see it.
- "Size" is the amount of characters a user will have when filling in the value for this field. The minimum is "1" character, and the maximum for a single field is "99" characters.
- If you mark the field as "Unique" then the value filled in for that field cannot be used again for another folder in the cabinet.

- Under "Field Type", you decide the field format; whether it should be a Numeric field (strictly numbers only), Text (alpha-numeric), Date Type, Dropdown or a Checkbox.
- After choosing your field type, click the blue button under "Mask" to format the field type. Some field formats will require you to select a mask.
- The "Tool Tip" is optional. If you fill in a tool tip for the field, your "hint" will be visible when users hover their mouse over the field.
- If you wish to add additional folder detail fields to the cabinet, click the "+" above "Field Name".

Subdividers



You will need to add at least one subdivider for the cabinet's folders. Just like those colorful tabs you can buy at an office supply store, subdividers offer a 3rd-level of organization for your document types, and act as "sub-folders" within your folders. If you don't feel that you will need to use multiple subdividers within your folders, you can make one called "ALL" or "DEFAULT". The maximum number of subdividers per cabinet is 2,500.

To create subdividers for use by any folder in the cabinet, click on the "Add" button for the section on the left, enter a name, and save. Subdividers can be created exclusively for specific folders within the cabinet when adding a document – those are all shown in the box on the right.

Once you have all of that information entered, click Save. You will then see the Security information pop up below.

Cabinet Security



At this point, you need to decide which groups/users can have access to this cabinet. You can click to add whichever groups you want to have access, in addition to individual users. Once you have added your user groups/individual users, click Save and Exit.

Creating a Folder

Admin > Setup > Manage Folders

Previously, when we discussed creating cabinets, we talked about creating **metadata fields** (folder details) for each cabinet. One field had to be marked as the “**Folder**” identifier; this is how folders are named within the system. For example, a cabinet dedicated to Vendors might want to have their folders named either Vendor Name or Vendor ID.

- Begin by selecting the **Cabinet Type**, then click **Add Folder**.
- Fill in all of the required metadata fields for your folder (all with a red asterisk).
- Add any **Notes** you feel necessary.
- Click **Save and Exit**.

The screenshot shows a web form titled "Brokers" with a table of fields and values. The fields include Name (marked with a red asterisk), ID Number, Contact Number, Address 1, Address 2, City, State (a dropdown menu with "Select" as the current value), and Zip Code. To the right of the table is a "Notes" section with a large text area. At the bottom right of the form are two buttons: "Save and Exit" and "Save".

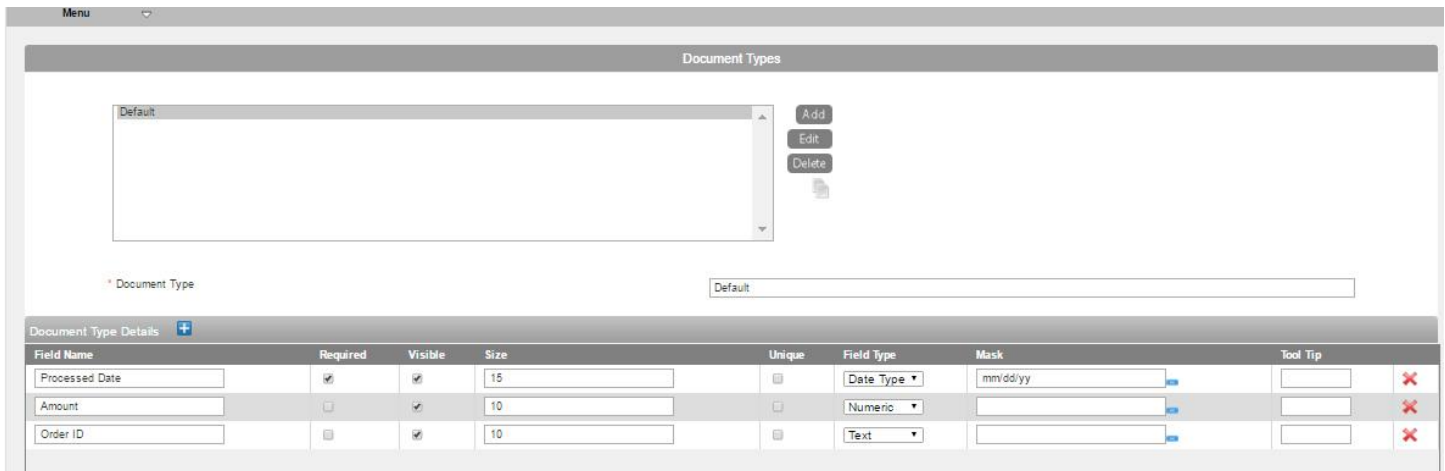
Creating a Document Type

Admin > Setup > Document Types

Every file that gets saved in PinPoint is labeled by a “document type”. By "document type", this **does not** refer to file type or file extension; rather, it is a classification of the kinds of documents you want to file.

Document types will have security set on them, and are used globally, which means they can be placed within any location the user has access to. Document types also have “metadata” assigned to them (document detail fields). These “index” fields will be used to help identify/locate a specific file within your file room.

For instance, if you create an “Invoice” document type, some examples for document metadata fields are, Invoice Number, Due Date, Amount Due, etc. Document types can also have workflow assigned to them, naming conventions and/or retention if needed.

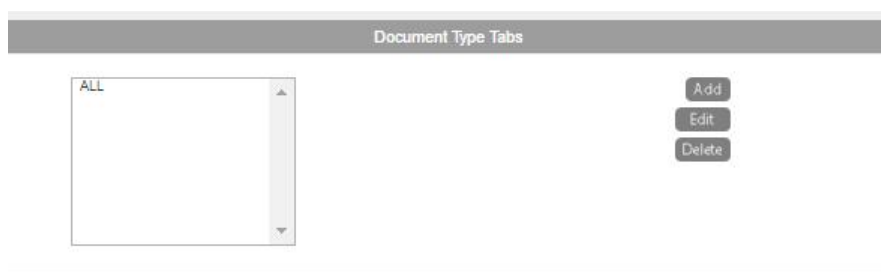


Click "Add" to begin to start, then type in the name for your new document type.

You will then need to add at least one metadata field for the document type.

- Document type metadata fields are filled in at the time a new file is added. These fields can be required or optional, but you will need to create at least one field before saving your new document type.
- The document metadata fields are more easily thought of as your document “detail” fields. When coming up with document metadata fields, ask yourself these questions: How do I want this document type identified? What type of information do I want associated with files that get saved as this document type? You are only required to have one document metadata field per document type, though you do not have to make it a "Required" field that must get filled in upon entry.
- If you are creating a document type for invoices, perhaps you will want a metadata field for the date on the invoice, the amount due or the invoice number. You could also create a checkbox to show whether that invoice has been paid, unpaid, disputed, etc.. You can have as many metadata fields as you need for each document type, and this metadata then becomes information you can filter your documents by when searching later.

Each “document type” you create will have its own “**Document Tabs**” to use as another layer to further organize your files. For example, you might have a document type called, “Invoices”. To separate invoices even more, you might have a document tab of “Paid” and “Unpaid” when searching for invoices, or possibly “tabs” for each of the years the invoices fall under.



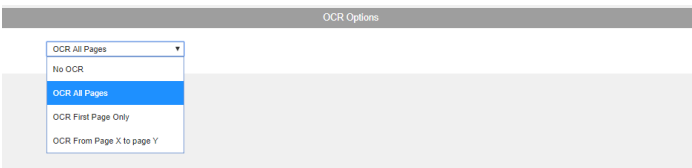
Though multiple tabs are not required, you must create at least one tab per document type. In this circumstance, you may create one called “ALL” or “Default” as an example.

Under the **Document Handling** section you will find additional features you can assign to the document type (optional):

- **Retention:** Decide if this document type will need retention assigned to it. If so, select a retention period from the drop-down menu. If the document type does not require retention, select "Retention Disabled". Please note, the [retention](#) periods in the drop-down will need to be created administratively prior to assigning it at the document type level).
- **Hold:** By checking this box, this means that any time a new file is added as this document type, the system will automatically place the file on "Hold", which means that it is in "read-only" for all users until the [hold](#) is removed by the system admin account.
- **Workflow:** If your document type will need to be assigned to a workflow, select one from the drop-down menu. Please note, the [workflow](#) will need to be created prior to adding your document type.
- **Variable Name:** If your document type will need a variable name assigned, please select one from the drop-down menu. Please note, the [variable naming](#) convention will need to be created prior to adding your document type.
- **Template:** If your document type will need a template assigned, please select one from the drop-down menu. Please note, the [template](#) will need to be created prior to adding your document type.
- **Do Not Version:** By checking this box, this means users will not be able to version any files saved in PinPoint as this document type. Please note that versioning will occur automatically unless you check the "Do Not Version" box.
- **Delayed Workflow:** If you select your [workflow](#) here, then set a "Number of Days", this will cause the system to "delay" the start of the workflow by the number of days inputted when the file is saved in PinPoint.



Under the **OCR Options** section, decide how you will want your document type to be OCR'd (makes non-handwritten content on pages searchable). You can choose to have documents under this document type OCR'd by all pages, only the first page, only a section of the document, or not at all.



Once finished, click "Save". You will then see the “Security” information pop up at the bottom of the screen.

After saving, you will need to decide which groups/users can access the document type. Click the "+" next to the group to give all users within the group access to the document type. Click the "+" next to a user to give only that individual access to the document type.

Once you have added your groups/users, click "Save and Exit" when finished.

Once you have all of that information entered, click Save. You will then see the Security information pop up below.

Document Type Security

Security			
In Groups	Not In Groups	In Users	Not In Users
1. 19287976	1. AADAMS	1. Akash Shukla	1.
2. A19287976	2. ABC INC	2. Allen Adams	2. ABC Company
3. ABC	3. Accounting AP	3. Alyson Ideman	3. ABC Employer
4. ACCTS Payable	4. Administrators	4. Amy Hansen	4. Brian Quinn
5. Administrative	5. Agents	5. Beaky Diamonds	5. Business Associate
6. ADMISSIONS DEPT	6. AP2	6. Betty Conner	6. Carey Smith
7. Agents	7. Attorneys	7. Board Member	7. Chris Bule

At this point, you need to decide which groups/users can have access to this document type. You can click to add whichever groups you want to have access, in addition to individual users. Once you have added your user groups/individual users, click Save and Exit.