

Content Search

Using the Content Search screen, you can search globally throughout the entire system. As a global search, you can filter/sort by the following fields to narrow down a document search (documents are sorted based on entry date initially).

From below the user menu on the left side, click the Search button.

Search Documents

Once you get to the Content Search page, all documents you have access to will be sorted in entry order.

The screenshot displays the Content Search interface. At the top, there are several filter sections: 'Cabinet' (dropdown), 'Folder' (dropdown), 'Sub-Divider' (dropdown), 'Doc Type' (dropdown), 'Doc Tab' (dropdown), 'Workflow' (dropdown), 'Active' (checkbox), 'Status' (dropdown), 'Tag' (dropdown), 'Date Type' (dropdown), 'Doc Date' (input), 'Metadata' (dropdown), 'Data Type' (dropdown), 'Doc Type' (dropdown), 'Notes' (input), 'Folder Notes' (checkbox), 'Bridge' (dropdown), 'Fields' (input), and 'Edition' (checkbox). Below these filters is a 'Saved Searches' section with a search bar and a 'Search' button. The main area is a table with the following columns: Actions, DocID, Doc Name, Cabinet, Folder, Sub-Divider, Doc Type, Doc Tab, 1st Field, 2nd Field, 3rd Field, Status, Doc Date, Entry Date, and Delayed Date. The table contains four rows of document data.

Actions	DocID	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	Doc Tab	1st Field	2nd Field	3rd Field	Status	Doc Date	Entry Date	Delayed Date
<input type="checkbox"/>	8178	Bethany Planter Transcript	Employees	Jerrod Barbosa	Other	Employment Agreement					→	09/24/2024	09/24/2024	
<input type="checkbox"/>	7185	Cover_Page_033-24 (UPC-102).pdf	Errick's Cabinet	Old Docs	Default	Customer Information					→	09/12/2024	09/12/2024	
<input type="checkbox"/>	7184	Cover_Page_033-24 (UPC-102) - chem.pdf	Errick's Cabinet	Old Docs	Default	Customer Information					→	09/12/2024	09/12/2024	
<input type="checkbox"/>	7181	Merge Test	Employees	Jerrod Barbosa	Other	Employee Application		09/11/2024			→	09/11/2024	09/11/2024	

The middle section of the page is used for searching documents globally within the filerroom:

- Cabinet: This is the top level in PinPoint. Cabinets hold the folders.
- Folder: This is the middle level in PinPoint. Folders are within cabinets.
- Sub-Divider: This is the bottom level in PinPoint. Sub-dividers store documents and are used to organize documents within folders.
- Doc Type: Each document that is added to PinPoint must be labeled by a document type, so this will always be a useful way to sort/filter.
- Doc Tab: This can be used to located a document that is labeled with a Doc Tab.
- Date Range: There are three different date types for a document.
 - Document Date: This is the only date a user can manually change for a document.
 - Entry Date: This is the date of when the document was added to PinPoint.
 - Updated Date: This is the date of when the document was last updated.
- Content: If you type content in this field and search, the system will only display documents that contain that content within the pages of the document. Please keep in mind that it will likely not pick-up hand-written content.
- Metadata (Doc Type/Folder):If a document has had any of its document metadata fields filled in, a user can search by the text that has been filled in to locate a document. Additionally, users can filter by Folder metadata fields, as well.
- Notes: This field can be found at the bottom of the screen when you have a document open. The Notes field does not have a character limit and all text inputted can be searched on.
- Folder Notes: When adding folders, there is an option to include folder notes. This filter displays only documents in the folder(s) that have the notes you are filtering by.

- Edition (checkbox):allows the user to display only files that are editions.
- Tag: If a document has been tagged with one of your customized tags, a user can filter by a specific tag. This will display only documents with that tag, no matter if they are in different cabinets, folders, etc.
- Workflow: This allows the user to display only documents that are part of an active workflow the user belongs to.
- Status: There are four different statuses of a document.
 - Checked In: This is the normal status of a document in PinPoint.
 - Checked Out: This means the document has been checked-out of PinPoint by another user. If a document is checked-out by another user, it is in read-only mode for all other users until the user who checked it out checks it back into PinPoint.
 - On Hold: If a document has been put “On Hold”, it means it is in read-only mode, though has not been checked-out by a user.
 - Finalized: If a document has been “finalized”, it means it can no longer be modified by any user.

Above the document grid, there is also a toolbar for you to filter by Doc Name, DocID, Cabinet, Sub-Divider, Doc Type, Doc Tab or Doc Date.

Save Searches

If you would like to save various searches that you have done, click the Saved Searches button.

1. Enter the Search Name.
2. Click Save Search.

Document View

To view a quick view of a document, click the DocID.

To launch a document to the File Review page, click the Doc Name.

Document Handling (Multiple Documents)

1. Select the documents you want to handle, then click the Fx button located above the documents list.
2. The Fx menu will list all functions you have the permissions for.

Personal Private Default

Cabinet <-- Select Cabinet --> Folder <-- Select Folder --> Search Folder
Doc Type <-- Select Doc Type --> Doc Tab <-- Select Doc Tab --> Workflow <-- Select ---> Active
From To
Content AND
Notes Folder Notes
Date Type Doc Date
Metadata Select Field
Bridge <-- Select --> Sub-Divider <-- Select Sub-Divider --> Status All
Tag <-- Select Tag --> Data Type Doc Type
Edition

Saved Searches

fx Name Doc Name Search

Search Clear

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Actions	DocID	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	Doc Tab	1st Field	2nd Field	3rd Field	Status	Doc Date	Entry Date	Delayed Date
<input checked="" type="checkbox"/> fx	7398	My First Doc	Customers	ABC Company	Correspondence	Checkbox Text		Yes			→]	05/25/2023	05/25/2023	
<input checked="" type="checkbox"/> fx	7397	My First Doc	Customers	ABC Company	Correspondence	Checkbox Text		Yes			→]	05/25/2023	05/25/2023	
<input checked="" type="checkbox"/> fx	7393	Adrienne Gorrie	HR Employee Files	Adrienne Gorrie	Completed Forms	Chet Invoice					→]	03/01/2023	03/10/2023	
<input type="checkbox"/> fx	7392	Adrienne Gorrie	HR Employee Files	Adrienne Gorrie	Completed Forms	Chet Invoice					→]	03/10/2023	03/10/2023	
<input checked="" type="checkbox"/> fx	7391	Adrienne Gorrie	HR Employee Files	Adrienne Gorrie	Completed Forms	Chet Invoice					→]	03/10/2023	03/10/2023	