

# Filing Multiple Documents

This first drag-and-drop function shown above is helpful when you have multiple documents that you need to add at one time, or multiple documents that need to get filed to separate folders.

## File Multiple Page

Using the File Multiple page, users can drag in multiple documents at once to an assigned location. Documents are filed based on the field assignments when they are dragged in.

From your menu, click Filing, then click Multiple.

The screenshot shows the 'File Multiple' interface. At the top, there are several dropdown menus: 'Cabinet' (with a red asterisk), 'Folder' (with a red asterisk), 'Sub-Divider' (with a red asterisk), and 'Doc Type' (with a red asterisk). Each dropdown has a search icon and a 'Select' label. To the right of these is a 'Search Folder' field with a magnifying glass icon. Below the dropdowns are 'Doc Tab' (with a red asterisk) and 'Doc Date' (set to '06/05/2023'). To the right of the 'Doc Date' field are 'Upload' (with a red asterisk), 'Choose file', 'Browse', and 'Add' buttons. Below these fields is a large dashed box labeled 'Drag Files Here'. At the bottom right, there are three buttons: 'Import', 'Clear', and 'Remove'.

1. Select the Cabinet.
2. Select the Folder.
3. Select the Sub-Divider.
4. Select the Doc Type.
5. Drag the documents to the box and you will see the location to where they will be filed.
6. If you are finished adding documents, you must click the Import button to save the documents.
7. If more documents are needing to be dragged into another location, repeat steps 1-5 above before clicking Import. When you are finished dragging in all the documents, then click the Import button to have them all saved to the field assignments they were given when they were dragged in.

## File Explorer Page

The second drag-and-drop function shown below is helpful when you want to drag documents directly to a folder or sub-divider on the File Explorer page.

From below the PinPoint menu on the left side, click the File Explorer button.

1. On the left side of the page, click the button next to the Cabinet you want to open.
2. Click the button next to the Folder you want to open.

Personal  Private  Default

Cabinet

Construction  
Customers  
HR Employee Files

Folder

Adrienne Gorrie

Sub-Divider

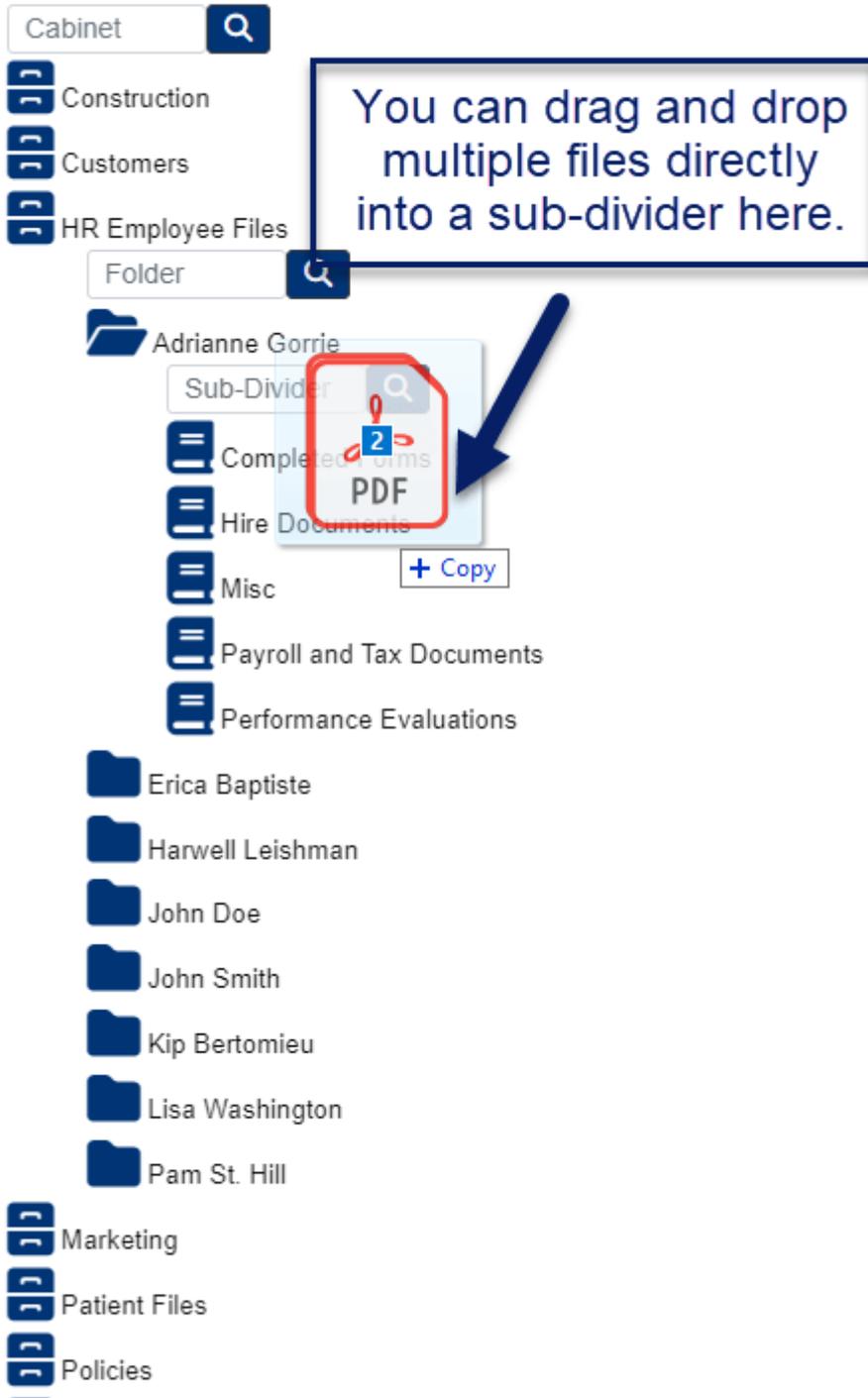
Completed Forms PDF

Hire Documents  
Misc  
Payroll and Tax Documents  
Performance Evaluations

Erica Baptiste  
Harwell Leishman  
John Doe  
John Smith  
Kip Bertomieu  
Lisa Washington  
Pam St. Hill

Marketing  
Patient Files  
Policies

You can drag and drop multiple files directly into a sub-divider here.



3. You can either drag documents directly to a folder or sub-divider (cannot drag documents directly to a cabinet)
4. After dragging the documents to a folder or sub-divider within the cabinet, a pop-up window will appear...

Drag & Drop ✕

Drag n Drop file review.png

|  |  |   |  |
|--|--|---|--|
| <span style="color: red;">*</span> Folder <span style="font-size: small;">?</span> Adrienne Gorri <span style="font-size: small;">⌵</span> | Search Folder <span style="float: right; color: white;">🔍</span> | <span style="color: red;">*</span> Sub-Divider Completed Forms <span style="font-size: small;">⌵</span> |  |
| Doc Name <input style="width: 90%;" type="text"/>  |  | Doc Date <input style="width: 90%;" type="text"/>   |  |
| <span style="color: red;">*</span> Doc Type <-- Select Doc Type --> <span style="font-size: small;">⌵</span>                               |  | Doc Tab <input style="width: 90%;" type="text"/> <span style="font-size: small;">⌵</span>               |  |

Remove
Remove All
Save Single
Save All

5. If you dragged directly to a folder instead of a sub-divider, you will be required to select the Sub-Divider.
6. Select the Doc Type, then fill in the required document metadata fields.
  - Select a Doc Date if you do not want the documents being assigned today's date.
  - Enter a Doc Name if you wish to rename the document before saving.
7. Clicking the Save Single button will save only one selected document at a time. Clicking the Save All button will save all the documents that you dragged in at once.

## Folder Details Page

The third drag-and-drop function shown below is helpful when you want to drag documents directly to a folder on the Folder Details page.

On the PinPoint menu, click "Locating" and then "Folder Details."

Cabinet HR Employee Files

Notes Description

Search Folder

| Employee ID | Employee Name   | Employee Hire Date | Employee eMail      | Employee Address  | Employee Phone Number | Department     | Active Employee | PayStub ID | Email Field |
|-------------|-----------------|--------------------|---------------------|-------------------|-----------------------|----------------|-----------------|------------|-------------|
| 93-6092971  | Adrienne Gorrie | 4/15/2018          | agorrie@lsspdms.com | 952 Pearson Trail | 186-120-5250          | Administrative | Yes             |            |             |

Adrienne Gorrie Documents

Doc Name DocID Doc Type Status

Sub-Divider Workflow Content Metadata

From To Date Type Doc Date Notes

Fields 5 Search Clear 25

| Action                      | DocID | Doc Name        | Folder          | Sub-Divider     | 1st Field | 2nd Field | 3rd Field | 4th Field | 5th Field | Doc Type     | Tab | Status | Doc Date   | Entry Date |
|-----------------------------|-------|-----------------|-----------------|-----------------|-----------|-----------|-----------|-----------|-----------|--------------|-----|--------|------------|------------|
| <input type="checkbox"/> fx | 7393  | Adrienne Gorrie | Adrienne Gorrie | Completed Forms |           |           |           |           |           | Chet Invoice |     | →]     | 03/01/2023 | 03/10/2023 |
| <input type="checkbox"/> fx | 7392  | Adrienne Gorrie | Adrienne Gorrie | Completed Forms |           |           |           |           |           | Chet Invoice |     | →]     | 03/10/2023 | 03/10/2023 |
| <input type="checkbox"/> fx | 7391  | Adrienne Gorrie | Adrienne Gorrie | Completed Forms |           |           |           |           |           | Chet Invoice |     | →]     | 03/10/2023 | 03/10/2023 |

1. At the top of the page, select the Cabinet you want to open.
2. Locate and select the Folder you want to add documents to.
3. After selecting the folder, click the Fx button above the documents list, then click the button next to Drag & Drop.
4. A pop-up window will appear where you can drag the documents in.

Adrienne Gorrie

Drag Files Here

\* Sub-Divider ? Completed Forms

Doc Name ?

\* Doc Type ? <-- Select Doc Type -->

Doc Date ?

Doc Tab ?

Remove Remove All Save Single Save All

5. Select the Sub-Divider.
6. Select the Doc Type, then fill in the required document metadata fields.
  - Select a Doc Date if you do not want the documents being assigned today's date.
  - Enter a Doc Name if you wish to rename the document before saving.
7. Clicking the Save Single button will save only one selected document at a time. Clicking the Save All button will save all the documents that you dragged in at once.