

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' and 'Doc Date' (set to '06/05/2023'). On the far right, there are 'Upload' (with a red asterisk), 'Choose file', 'Browse', and 'Add' buttons. Below the form fields is a large dashed box labeled 'Drag Files Here'. At the bottom right, there are three blue 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

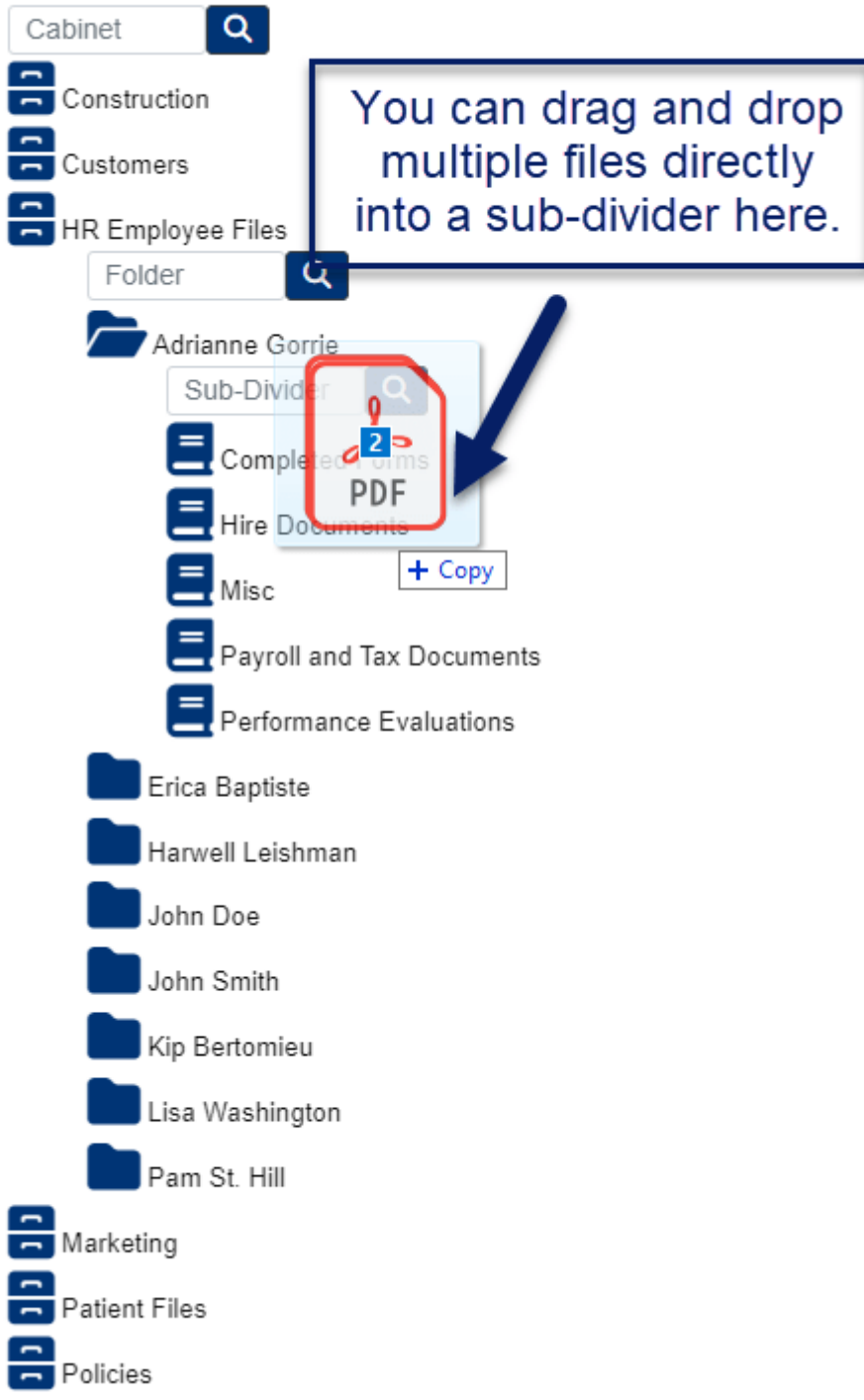
Sub-Divider

Completed Forms
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

* Folder ? Adrienne Gorri ⌵ Search Folder Q

Doc Name

* Doc Type <-- Select Doc Type --> ⌵

* Sub-Divider Completed Forms ⌵

Doc Date

Doc Tab ⌵

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 <-- Select Doc Type --> Status All

Sub-Divider Completed Forms Workflow <-- Select ---> Content Metadata

From To Date Type Doc Date Notes

Fields 5 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"/>	7393	Adrienne Gorrie	Adrienne Gorrie	Completed Forms						Chet Invoice			03/01/2023	03/10/2023
<input type="checkbox"/>	7392	Adrienne Gorrie	Adrienne Gorrie	Completed Forms						Chet Invoice			03/10/2023	03/10/2023
<input type="checkbox"/>	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

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.