

# Gallery View

The Gallery View search is a cascading drill-down where you click through each layer in the PinPoint infrastructure, starting with the Cabinet, Folder and then Sub-Divider.

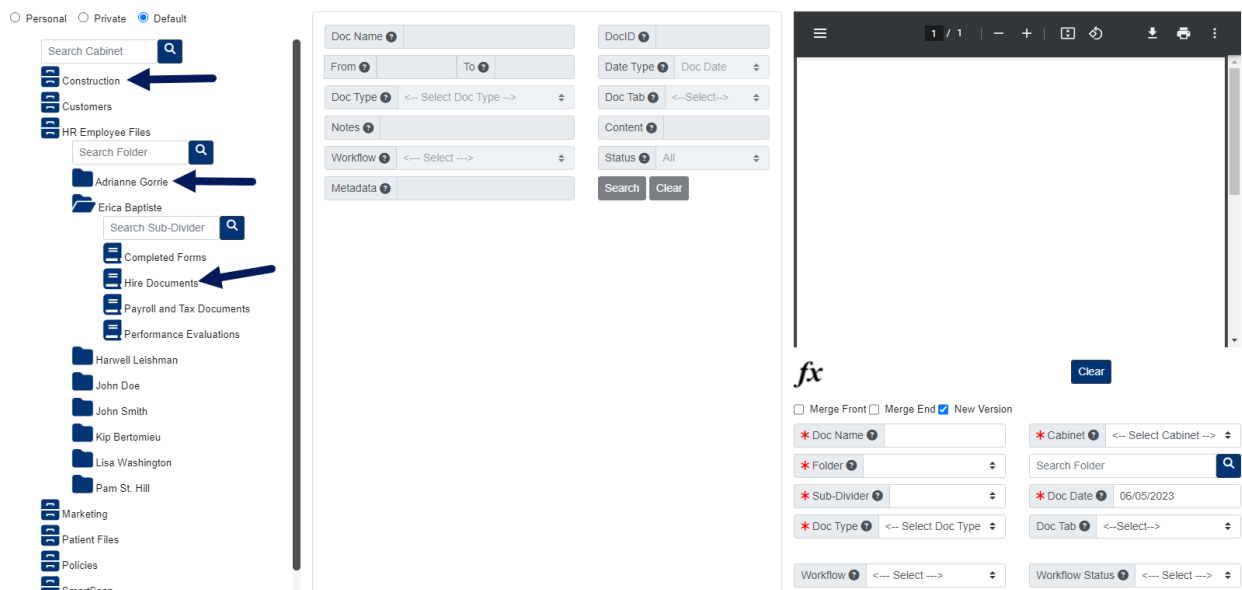
Once you drill-down to the Sub-Divider, documents within will display in the middle section of the screen. You have the option to view your files as a thumbnail preview, or as a list view including the document name. You may switch between the two using the blue tabs in the center of the screen.

Additionally, documents can be dragged directly into the sub-divider you want to file document(s) to.

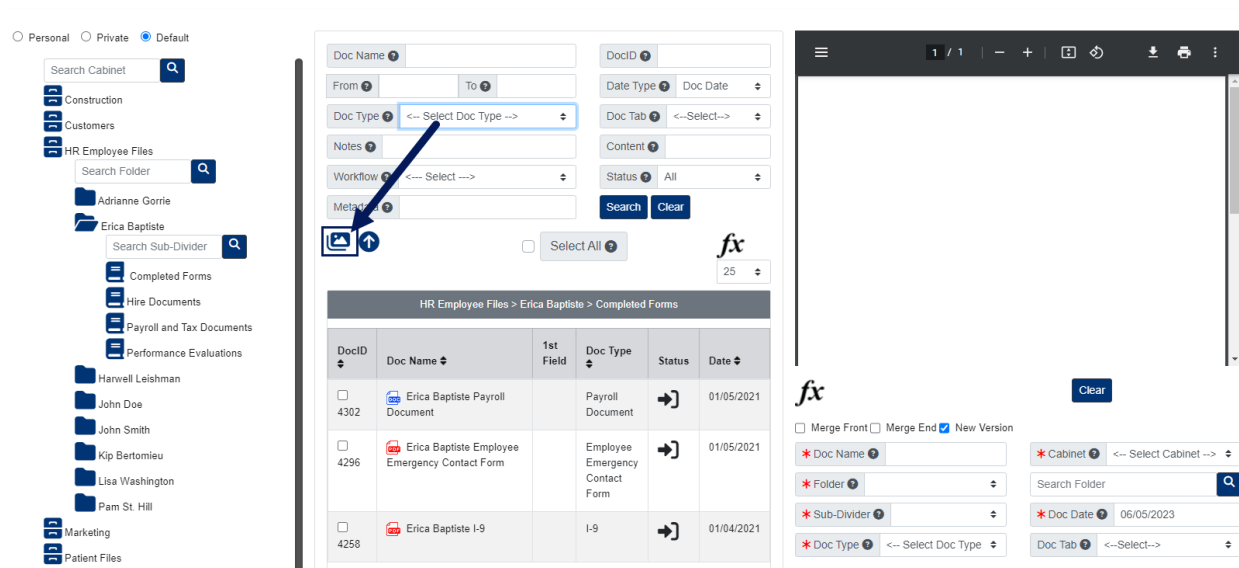
From the PinPoint menu on the left side of the screen, select “Locating” and then “Gallery View.”

## Search Documents

1. On the left side of the page, click the button next to the Cabinet you want to open.
2. Click the “folder button” next to the Folder you want to open. Clicking the “folder name” will open a display window with all the folder details.
3. Click the button next to the Sub-Divider you want to open.



4. Once you open the sub-divider, the documents within the sub-divider will be visible in the middle of the page. If you wish to view a list view of documents instead of a thumbnail view, use the List View button below the Metadata field in the middle of the page.



5. The middle section of the page is used for searching documents within the sub-divider you opened:

- Document Name: This allows a user to search for a document by name. This is a wildcard search, so the system will look at any part of the name.
- DocID: This allows a user to search for a document ID number.
- 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.
- 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.
- Notes: This field can be found at the bottom-right 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.
- 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.
- Workflow: This allows the user to display only documents that are part of an active workflow.
- 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 placed "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.
- Metadata: 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.

# Document View

List View:

To view a quick view of a document, click the Doc Name.

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

Thumbnail View:

To view a quick view of a document, click the Doc Image.

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

## Document Handling

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.
3. Click the button next to the Sub-Divider you want to open.
4. Once you open the sub-divider, the documents within the sub-divider will be visible in the middle of the page.
  - You can change the number of documents listed per page using the dropdown field below the Fx button above the document list in the middle of the page.
5. Select the documents you want to handle, then click the Fx button located above the documents list in the middle of the page. The Fx menu will list all functions you have the permissions for.

The screenshot displays the Document Handling interface. On the left is a sidebar with a tree view of the document hierarchy, including cabinets like 'Construction', 'Customers', and 'HR Employee Files', and sub-dividers like 'Adrianne Gorrie', 'Erica Baptiste', and 'Harwell Leishman'. The 'Erica Baptiste' sub-divider is selected. In the center is a search and filter panel with fields for 'Doc Name', 'DocID', 'From', 'To', 'Doc Type', 'Notes', 'Workflow', 'Metadata', 'Date Type', 'Doc Date', 'Doc Tab', 'Content', and 'Status'. Below these fields are 'Search' and 'Clear' buttons. To the right of the search panel is a table of documents. The table has columns for 'DocID', 'Doc Name', '1st Field', 'Doc Type', 'Status', and 'Date'. Three documents are listed: 'Erica Baptiste Payroll Document' (DocID 4302), 'Erica Baptiste Employee Emergency Contact Form' (DocID 4296), and 'Erica Baptiste I-9' (DocID 4258). The first two documents are selected with checkboxes. Above the table is an 'Fx' button and a dropdown menu set to '25'. To the right of the table is a large preview area showing a document thumbnail. Below the table is another 'Fx' button and a dropdown menu set to '25'. At the bottom right is a 'Clear' button.

DocID	Doc Name	1st Field	Doc Type	Status	Date
4302	Erica Baptiste Payroll Document		Payroll Document	→	01/05/2021
4296	Erica Baptiste Employee Emergency Contact Form		Employee Emergency Contact Form	→	01/05/2021
4258	Erica Baptiste I-9		I-9	→	01/04/2021

## Merging New Pages to an Existing Document

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.
3. Click the button next to the Sub-Divider you want to open.
4. Once you open the sub-divider, the documents within the sub-divider will be visible in the

middle of the page.

5. Open the quick view of the document so it appears on the right-side of the page.
6. Click the Import button below the Doc Image, then drag the new pages into the box that appears in the middle of the page. The new pages you dragged to the box will then appear on the right-side of the page.

The screenshot displays a document management system interface. On the left is a sidebar with a search bar and a tree view of folders including Construction, Customers, HR Employee Files, and others. The central pane shows a table of documents under the path 'HR Employee Files > Erica Baptiste > Completed Forms'. The table has columns for DocID, Doc Name, 1st Field, Doc Type, Status, and Date. Three documents are listed: 'Erica Baptiste Payroll Document' (DocID 4302), 'Erica Baptiste Employee Emergency Contact Form' (DocID 4296), and 'Erica Baptiste I-9' (DocID 4258). On the right, a preview pane shows a 'Direct Deposit Authorization Form' with fields for Name, Address, and City/State/Zip. A blue arrow points to the 'Import' button below the document image in the preview pane.

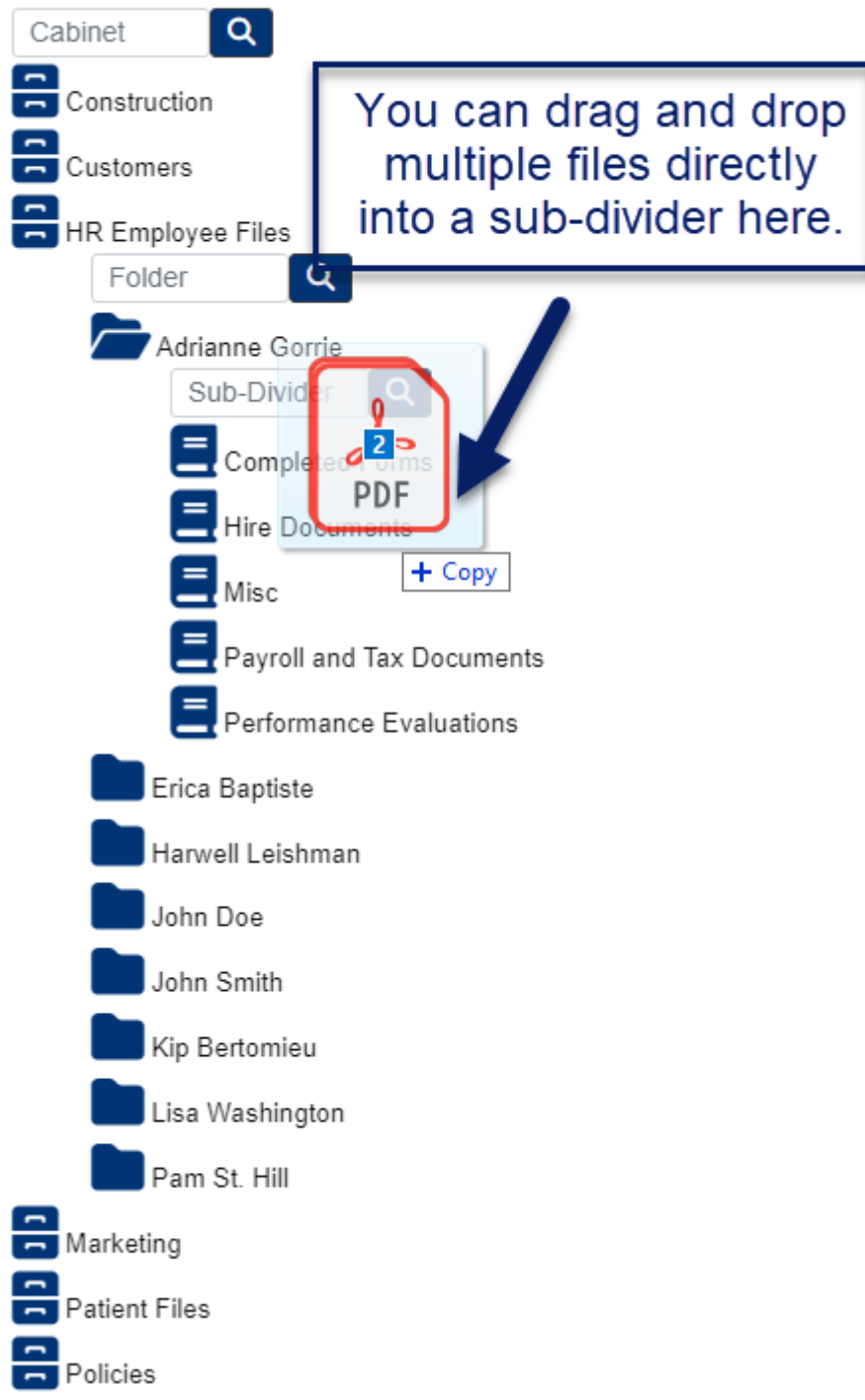
DocID	Doc Name	1st Field	Doc Type	Status	Date
4302	Erica Baptiste Payroll Document		Payroll Document	→	01/05/2021
4296	Erica Baptiste Employee Emergency Contact Form		Employee Emergency Contact Form	→	01/05/2021
4258	Erica Baptiste I-9		I-9	→	01/04/2021

7. After you drag in the new pages, check the box for Merge Front or Merge End located below the document image on the right side of the page. This will either merge the new pages to the front or end of the existing document.
  - Please note that if you do not check one of these two boxes before saving, the new pages will replace the existing document as a new version.
8. Click Save button below the document image on the right side of the page when you are finished.

## Add Documents

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.
3. You can either drag documents directly to a folder or sub-divider (cannot drag documents directly to a cabinet).

☐ Personal ☐ Private ☒ Default



4. After dragging the documents to a folder or sub-divider within the cabinet, a pop-up window will appear...

Adrianne 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

- If you dragged documents directly to a folder instead of a sub-divider, you will be required to select the Sub-Divider.
- 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

5. 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.

## Add Folders

○ Personal ○ Private ○ **Organization**

Search Cabinet

- Construction
- Customers
- HR Emplo
- Marketing
- Patient Files
- Policies
- SmartScan
- Student Records
- Vendors

Doc Name ?

From To

? Doc Type ? <-- Select Doc Type -->

? Notes ?

? Workflow ? <-- Select -->

? Metadata ?

? DocID ?

? Date Type ? Doc Date

? Doc Tab ? <--Select-->

? Content ?

? Status ? All

Search
Clear

1 / 1
+
+
+
+

fx

Clear

☐ Merge Front
 ☐ Merge End
 ☒ New Version

\* Doc Name ?

\* Folder ? <-- Select folder -->

\* Sub-Divider ? <-- Select Sub Div

\* Doc Type ? <-- Select Doc Type

\* Cabinet ? <-- Select Cabinet -->

? Search Folder

\* Doc Date ? 06/05/2023

? Doc Tab ? <-- Select Tab -->

1. Right-mouse click the cabinet you want to add a folder to.
2. Fill in the required Folder Fields and Save.