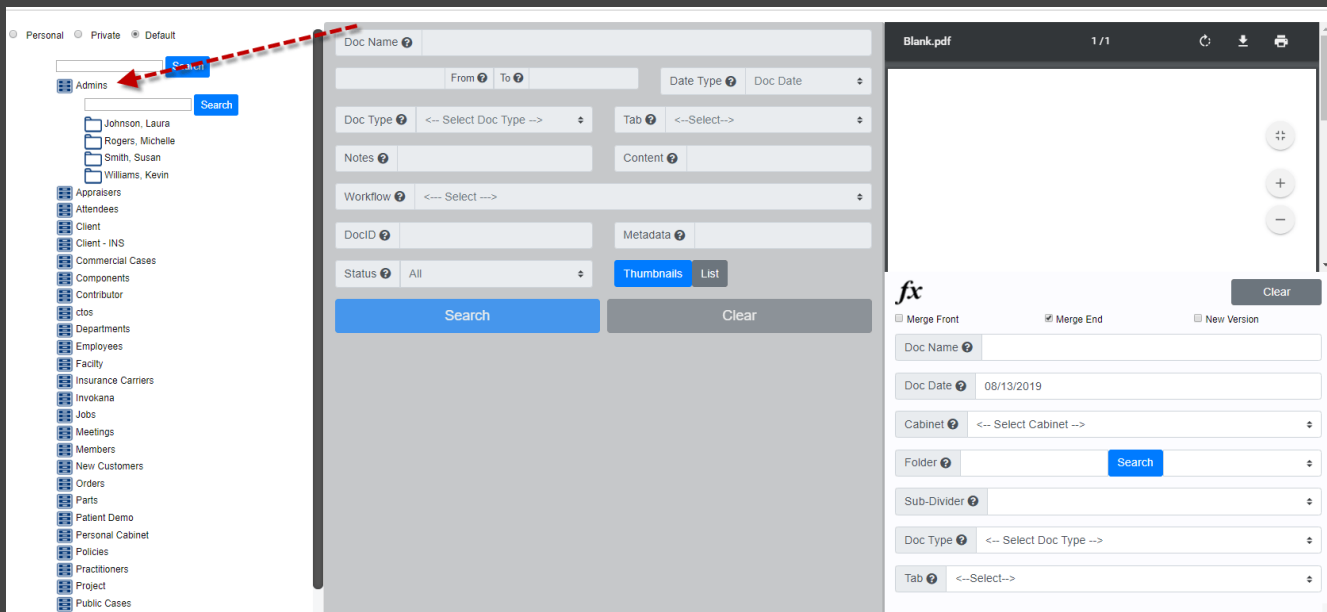


MANAGING CABINETS

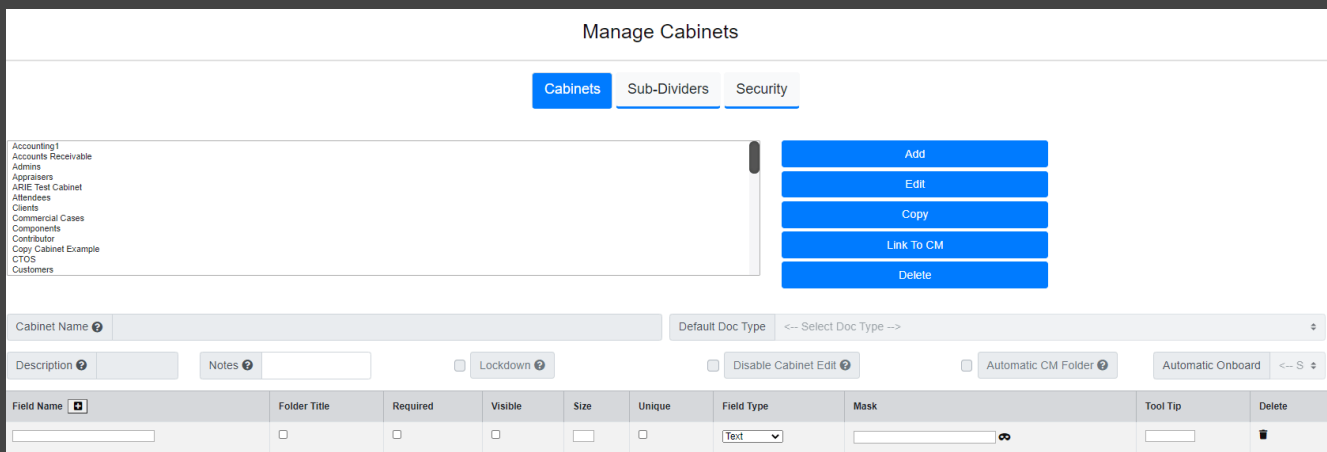


Think of cabinets in PinPoint just as you do cabinets in an actual file room at the office. Cabinets help you separate documents at the highest security level into subject matter, department or group.

Each cabinet you add will have its own set of folders that it stores. You can create as many cabinets as you need to organize your folders efficiently.

- [VIEW](#) Add a Cabinet
- [VIEW](#) Edit a Cabinet
- [VIEW](#) Copy a Cabinet
- [VIEW](#) Delete a Cabinet

ADD A CABINET



1. Go to Admin > Fileroom > Cabinets
2. Click the Add button to begin.

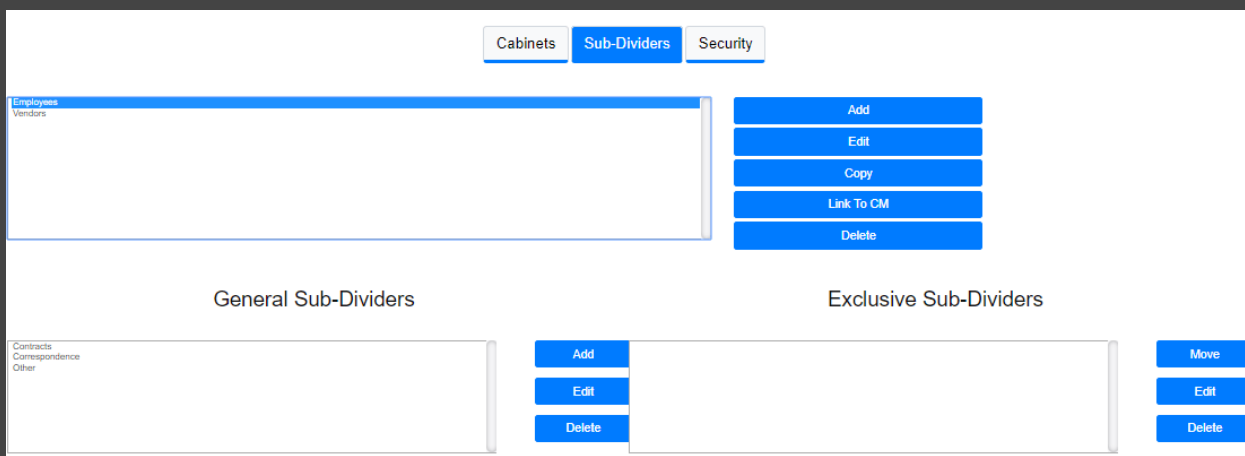
3. Enter the Cabinet Name.

- Default Doc Type: Select a doc type you want auto-selected when a user searches or adds documents in the cabinet. This is not a requirement.
- Description/Notes: Enter the information you feel is relevant for other administrators to view when they are on the Manage Cabinet screen. This is not a requirement.
- Lockdown: This setting will put the cabinet in lockdown mode so new folders cannot be added and existing folders cannot be modified or deleted. This setting can be deactivated any time after being activated.
- Disable Cabinet Edit: This will disable the ability to edit the cabinet for all users. Once disabled, only the system admin can enable editing for the cabinet.
- Automatic CM Folder: Check this box if you want the system to also create a contact on the Contact Management side of PinPoint every time a new folder is added to the cabinet.
- Automatic Onboard: Select an onboard you want assigned to all new folders added to the cabinet. This is not a requirement.

4. Under Field Name, enter the title for the folder field so users know what to fill in when a folder is added to the cabinet. Additional folder fields can be added by clicking the “+” icon. You must check both the Folder Title box and the Required box for at least one of the folder fields.

- Visible: When checked, the folder value is visible to your users. If unchecked, then only users who have visibility permissions can view the folder value.
- Size: The max number of characters that can be entered for the field. The maximum is 99.
- Unique: When checked, the folder value for that field cannot be used more than once.
- Field Type: Select the field format; whether it should be a Numeric field (numbers only), Text (alpha-numeric), Date Type, Drop-Down or a Checkbox. Some field types require you to set the field format using the Mask button.
- Tool Tip: If you fill in a tool tip for the field, your “hint” will be visible when users hover their mouse over the field when adding a new folder.

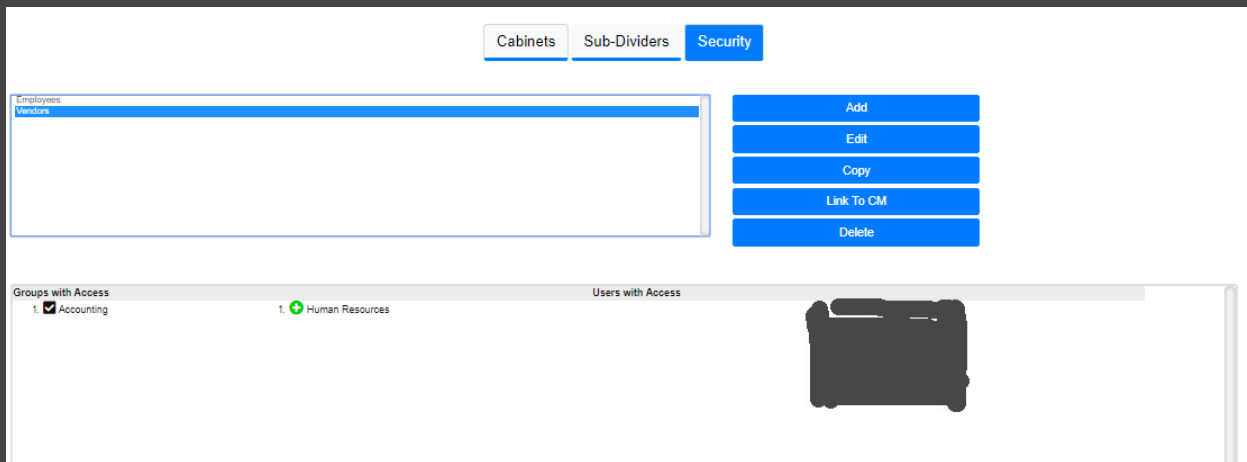
5. When you are finished adding folder fields, click the Sub-Dividers tab at the top of the screen.



6. You must add at least one General sub-divider to save the cabinet. A sub-divider is like

the colored tab on a manila folder, helping you organize documents within folders.

- After adding at least one General sub-divider, click the Security tab at the top of the screen to set the security for the cabinet.



- When you're finished, click Save and Exit at the bottom of the screen.

DELETE A CABINET

Please note, you can only delete a cabinet if it does not contain documents and there are no recoverable documents for the cabinet.

- Go to Admin > Fileroom > Cabinets
- Select the cabinet you want to delete.
- Click the Delete button.
- Click Yes to confirm.

COPY A CABINET

If you want to copy an existing cabinet, follow the steps below. This will copy the existing



cabinet's folder fields, sub-dividers and security setup.

- Go to Admin > Fileroom > Cabinets
- Select the cabinet you want to copy.
- Click the Copy button.
- Enter the Cabinet Name (cannot be the same name as an existing cabinet).
- Click the Add button.