

Managing Document Types

Every file you add to PinPoint will be labeled by a Doc Type, which is one of the ways you can identify a document in your fileroom. Additionally, each Doc Type can be assigned specific settings such as retention, variable naming, and workflow, recurring workflow, and email notifications based on document updates by other users.

From the menu on the left-side of the screen, click Admin, then click Doc Types under the Fileroom Management column, or click the Doc Types button below the admin menu.

Doc Type	Search Doc Types	Search	Clear	Add Doc Type					
Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
1 >									
	1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith
	Assessment	OCR All Pages	No						John Smith
	Chargeback	OCR All Pages	No					All	John Smith
	Checkbox Text	OCR All Pages	No						John Smith
	Chet Invoice	OCR All Pages	No		Invoice				System System
	Contract	OCR All Pages	No					All	System System
	Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
	Drawing	OCR All Pages	No						user 393
	Driver application	OCR All Pages	No						user 503
	Employee Application	OCR All Pages	No					All	System System
	Employee Contract	No OCR	No		Global Naming Convention			All	John Smith

Add Doc Type

1. To begin, click the Add Doc Type button located at the top of the page.

Doc Type
✕

* Doc Type

Workflow

Variable Name

Template/Proximity

Retention

Bridge

Recurring Workflow

Start Date

OCR Handling

Retention Disabled

Do Not Version

Hold

Last User:

Date Added:

Date Edited:

Add Doc Type Field: A 📅 📌 📄 + ⬇️ ✉️ Σ

* Field Name	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Actions

1. Enter the Doc Type Name.
2. Using the icon buttons above Field Name, you can add document metadata fields, but you are not required to. When coming up with document metadata fields, ask yourself these questions: How do I want this Doc Type identified? What type of information do I want associated with files that get saved as this Doc Type?
3. If needed...
 - o You can make any document metadata field Required, which means users must fill in the metadata field at the time a new file is added as the Doc Type.

- You can change the character limit for each metadata field using the Size The maximum characters you can set per field is 99.
- You can make a metadata field unique by checking the Unique
- You can adjust the metadata field format using the Mask button.
- You can enter a Tool Tip for any metadata field, which will be visible when users place their mouse over the metadata field when adding a new file as the Doc Type.

4. Additional options if needed include.

- Assign a Workflow to the Doc Type so that documents of this type will automatically trigger a workflow to begin.
- Assign a Recurring Workflow and set a frequency for how often the triggered workflow is to occur. Use the Start Date field and dropdown to set the frequency.
- Assign a Variable Name so that documents of this type will be automatically renamed based on a specific naming convention.
- Assign a Template/Proximity Search so that documents of this type will automatically have the document fields populate based on text it pulls from the first page of the document.
- Assign a Retention so that documents of this type cannot be removed by any user until their retention date is met.
- Assign a Bridge so that you can run a global search for all Doc Types assigned the same bridge connect.
- Check the box for Do Not Version if you do not want documents of this type to store multiple versions of the document if it is updated by a user.
- Check the box for Hold if you want all documents of this type

Doc Tabs

Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
1 >									
    	1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith
    	Assessment	OCR All Pages	No						John Smith
    	Chargeback	OCR All Pages	No					All	John Smith
    	Checkbox Text	OCR All Pages	No						John Smith
    	Chet Invoice	OCR All Pages	No		Invoice				System System
    	Contract	OCR All Pages	No					All	System System
    	Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
    	Drawing	OCR All Pages	No						user 393

If you would like to include Doc Tabs for your Doc Type, you can do so any time. Adding Doc Tabs allows users to further organize a Doc Type.

1. Under the Actions column, click the Doc Tabs button next to the Doc Type you want to add Tabs to.
2. In the pop-up window, enter the Doc Tab Name.
3. Click Save when finished.

Doc Type Security

Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
	1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith
	Assessment	OCR All Pages	No						John Smith
	Chargeback	OCR All Pages	No					All	John Smith
	Checkbox Text	OCR All Pages	No						John Smith
	Chat Invoice	OCR All Pages	No		Invoice				System System
	Contract	OCR All Pages	No					All	System System
	Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
	Drawing	OCR All Pages	No						user 393

1. Under the Actions column, click the Security button next to the Doc Type you want to set security for.
2. In the pop-up window, select the Group/Users you want to give access to the Doc Type.
3. Close the window when finished.

Edit Doc Type

Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
	1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith
	Assessment	OCR All Pages	No						John Smith
	Chargeback	OCR All Pages	No					All	John Smith
	Checkbox Text	OCR All Pages	No						John Smith
	Chat Invoice	OCR All Pages	No		Invoice				System System
	Contract	OCR All Pages	No					All	System System
	Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
	Drawing	OCR All Pages	No						user 393

1. Click the Doc Type Name to edit a Doc Type.
2. A pop-up window will appear with the document type settings. If you are logged in as the master admin account, you can also re-order document fields any time by clicking the arrows below the Actions column.
3. After making you changes, click the Save button.

Delete Doc Type

Doc Type	Search Doc Types	Search	Clear	Add Doc Type	Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
1 >														
						PTA Bill	OCR All Pages	No				PTA Bill		John Smith
						Assessment	OCR All Pages	No						John Smith
						Chargeback	OCR All Pages	No					All	John Smith
						Checkbox Text	OCR All Pages	No						John Smith
						Chet Invoice	OCR All Pages	No		Invoice				System System
						Contract	OCR All Pages	No					All	System System
						Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
						Drawing	OCR All Pages	No						user 393

Please note, you can only delete a Doc Type if it is empty and there are no recoverable documents for the Doc Type.

1. Under the Actions column, click the Delete button next to the Doc Type you want to delete.
2. Click Yes to confirm.

Copy Doc Type

Doc Type	Search Doc Types	Search	Clear	Add Doc Type	Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By
1 >														
						1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith
						Assessment	OCR All Pages	No						John Smith
						Chargeback	OCR All Pages	No					All	John Smith
						Checkbox Text	OCR All Pages	No						John Smith
						Chet Invoice	OCR All Pages	No		Invoice				System System
						Contract	OCR All Pages	No					All	System System
						Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith
						Drawing	OCR All Pages	No						user 393

Copying a Doc Type will copy the existing cabinet's Metadata Fields, Doc Tabs, Document Handling, and Security. Changes can be made to the copy once added.

1. Under the Actions column, click the Copy button next to the Doc Type you want to copy.
2. Enter the Doc Type Name.
3. Click the Save button.

Email Setup

Doc Type		Search Doc Types	Search	Clear	Add Doc Type					
Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template/Proximity	Default Doc Tab	Updated By	
1 >										
	1) PTA Bill	OCR All Pages	No				PTA Bill		John Smith	
	Assessment	OCR All Pages	No						John Smith	
	Chargeback	OCR All Pages	No					All	John Smith	
	Checkbox Text	OCR All Pages	No						John Smith	
	Chet Invoice	OCR All Pages	No		Invoice				System System	
	Contract	OCR All Pages	No					All	System System	
	Customer Form	OCR All Pages	No	Retention Example		John's Workflow	Customer Form Template		John Smith	
	Drawing	OCR All Pages	No						user 393	

Email Setup allows you to assign specific Groups or Users to be sent an email if any document of a specific Doc Type is updated in any way.

1. Under the Actions column, click the  button Email Setup button next to the Doc Type you want to copy.
2. Add the Groups and/or Users who will be notified.
3. Close the pop-up window when finished.