



User Dashboards

As a user, you can choose between two different User Dashboards:

Classic Dashboard

Recent Documents							
Checked-Out Documents							
Document Workflows							
Non-Document Workflows							
Activity Date	DocID	Doc Name	Doc Type	Cabinet	Folder	Sub-Divider	Status
06/05/2023	fx 7392	 Adrienne Gorrie	Chet Invoice	HR Employee Files	Adrienne Gorrie	Completed Forms	→]
05/31/2023	fx 6491	 ABC Company Invoice	Invoice	Customers	ABC Company	Invoices	→]
05/25/2023	fx 7393	 Adrienne Gorrie	Chet Invoice	HR Employee Files	Adrienne Gorrie	Completed Forms	→]

The Classic Dashboard has four separate sections:

1. Recent Documents - displays the last 30-days of documents you have added or updated.
2. Checked-Out Documents - displays all documents you currently have checked-out of PinPoint.
3. Document Workflows - displays the next 30 days of document workflow tasks assigned to you.
4. Non-Document Workflows - displays the next 30 days of non-document workflow tasks assigned to you.

Express Dashboard



The Express Dashboard has five separate sections for a quick shortcut to the most used pages:

1. Locating - Gallery View, Content Search, Folder Details, Shared Documents, My Polls, Form Requests
2. Filing - Single, Multiple, SmartScan, Mail Merge Letter
3. Workflow - My Workflows, Supervisor Workflows, My Onboards
4. Contact Management - Accounts, Contacts
5. Learning Management - My Courses