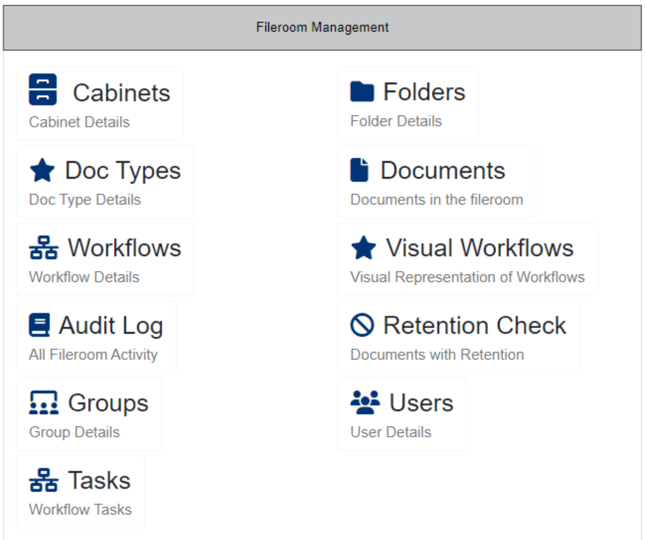
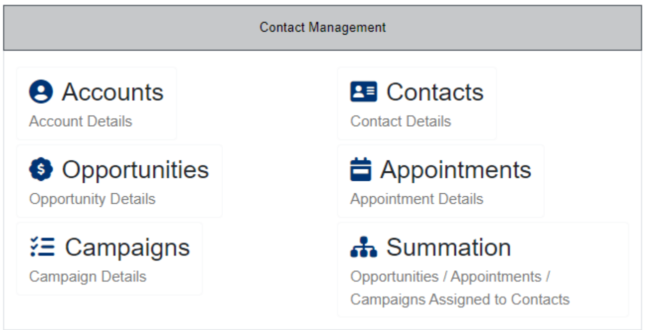
Reports

To run a report within your PinPoint fileroom, go to Reports within the PinPoint menu on the left side.





Generate Report

1. Select the report you want to generate.
2. Click the Generate button.
3. Once the report is generated, users can Print the report or export the report to Excel, CSV, or PDF.
    - If you use the Generate with ARIE button for a report, you will need to click the Download report button to access the download when it is ready.

Under Fileroom Management, the following reports can be generated.

- Cabinets: This report covers the names of cabinets and the folder fields.
- Folders: This report covers the names of folders within the selected cabinet, including folder metadata.
- Doc Types: This report includes the names of doc types and the metadata fields.
- Documents: This report covers the documents within the file room, including document metadata. Before you generate the report, you can use any of the following document filters:
    - Cabinet/Folder/Sub-Divider: The report will be on all documents within the selected cabinet/folder/sub-divider.
    - Doc Type/Doc Tab: The report will be on all documents labeled by the selected doc type/doc tab.
    - Workflow: The report will be on all documents assigned to the selected workflow.
    - Tag: The report will be on all documents assigned to the selected tag.
    - Content: The report will be on all documents that contain the content you enter.
    - Notes: The report will be on all documents that contain the note you input.
    - Folder Notes: The report will be on all documents within the folder that contains the folder note you input.
    - Metadata: The report will be on all documents that contain the metadata you enter.
    - Date Range: The report will be on all documents within the selected date range. You can

also select the Date Type for your report.
    - Version Report: You can select between the following options: Current Version, Documents with 1 Version, Documents with More than 1 Version, All Versions.
- Workflows: This report covers the names of workflows and the task details. Just select the Workflow, then generate the report.
- Audit Log: The audit log allows administrators to view all actions taken place within the fileroom. Admin users can search through the audit log by user and date range.
- Visual Workflows: This report is for a visual representation of a workflow. Just select the Workflow, then generate or print the report.
- Audit Log: This report covers your system's user activity.
    - User: The report will be on only the selected user.
    - Log From: If you choose Fileroom, then you will get the log in/log out report. If you choose Main, you will get all other activity in your report.
    - Date Range: The report will be on all activity within the selected date range.
    - Retention Check: This report covers all documents with retention policies. Before you generate the report, you can use any of the following document filters:
        - Cabinet/Folder/Sub-Divider: The report will be on all documents within the selected cabinet/folder/sub-divider.
        - Doc Type/Doc Tab: The report will be on all documents labeled by the selected doc type/doc tab.
        - Workflow: The report will be on all documents assigned to the selected workflow.
        - Tag: The report will be on all documents assigned to the selected tag.
        - Content: The report will be on all documents that contain the content you enter.
        - Notes: The report will be on all documents that contain the note you input.
        - Folder Notes: The report will be on all documents within the folder that contains the folder note you input.
        - Metadata: The report will be on all documents that contain the metadata you enter.
        - Date Range: The report will be on all documents within the selected date range. You can also select the Date Type for your report.
- Groups: This report covers the names of groups and the users in each group.
- Users: This report covers all user basic information, such as username, first & last name, user type and email.

Under Contact Management, the following reports can be generated:

- Accounts: This report covers all accounts in the file room.
- Contacts: This report covers all contacts within the selected account.
- Opportunities: This report covers all opportunities in the file room.
- Appointments: This report covers all appointments in the file room.
- Campaigns: This report covers all campaigns in the file room.
- Summation: This report covers all appointments, campaigns, opportunities for a CM contact. Just select the Contact, then generate the report.