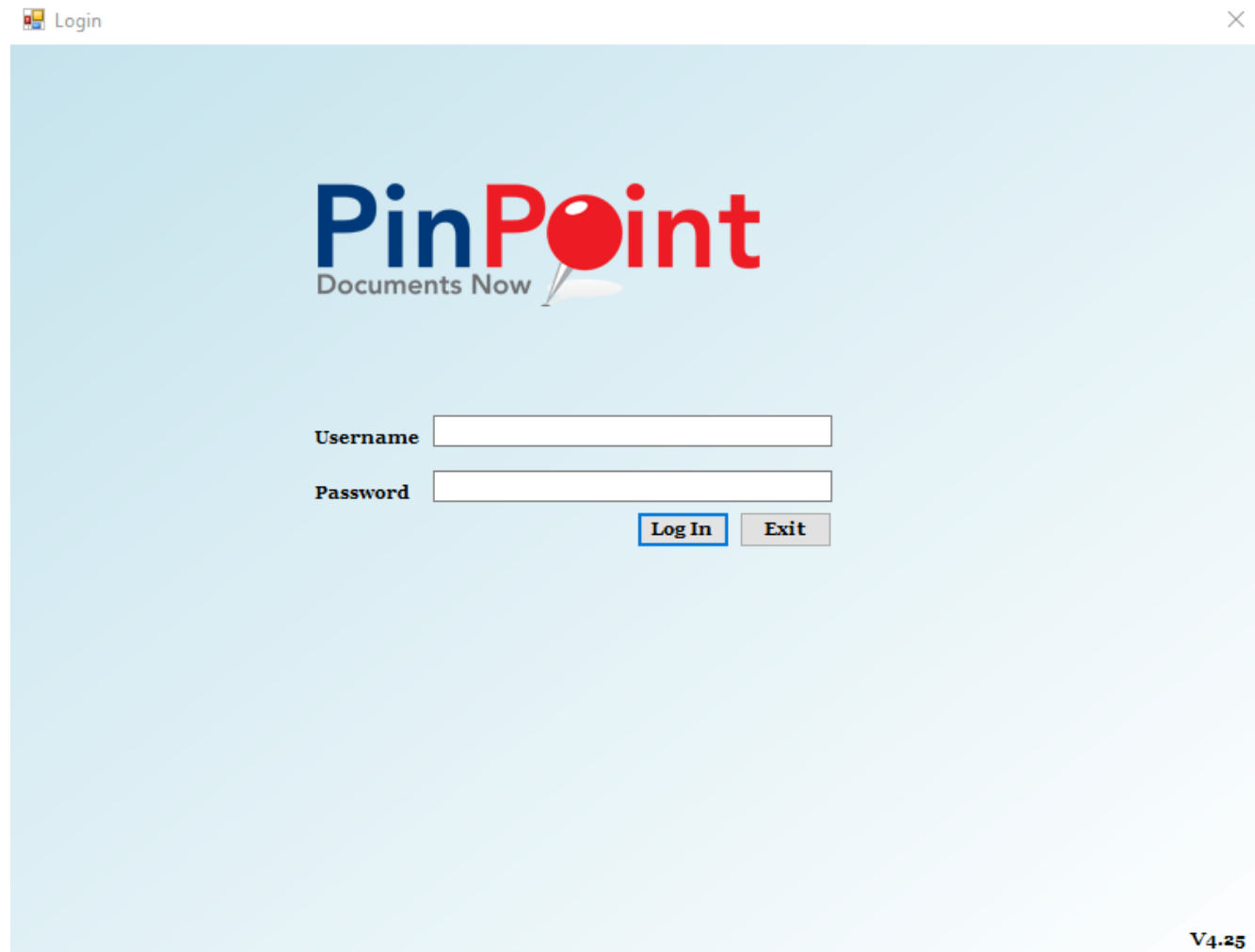


# Using the PinPoint Desktop Application

1. Enter your PinPoint Username and Password.
2. Hit Enter or click Log In.



PinPoint  
Documents Now

Username

Password

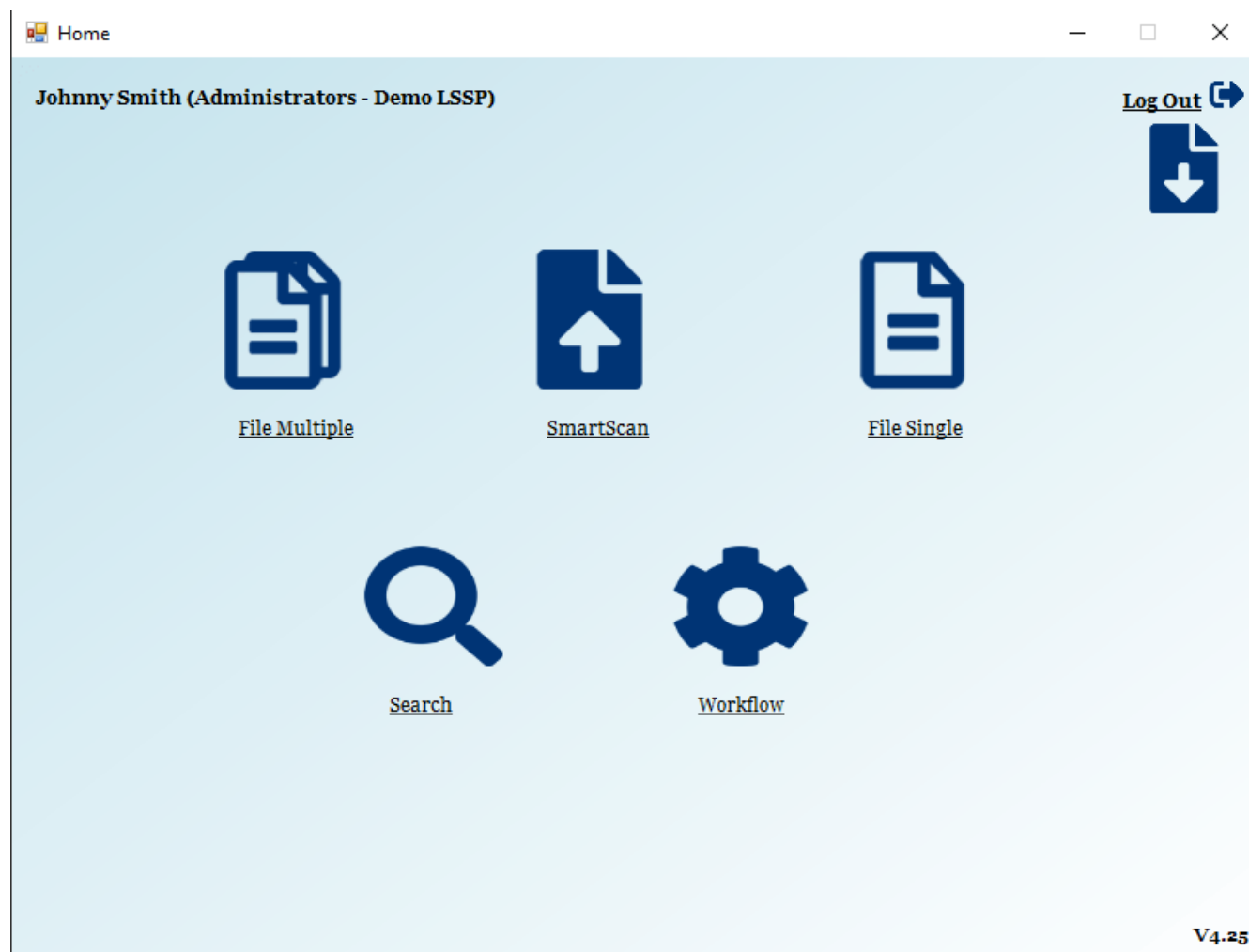
V4.25

## Home

The Desktop home page has 6 buttons:

1. Document *pin* - this button will open the current *launch.pin* in the users Downloads folder. A *launch.pin* is added to a user's Downloads folder when the user clicks the "Launch to Desktop" icon for a document from the File Review page in the PinPoint browser application.
2. File Multiple - this page allows users to drag multiple documents into the Cabinet/Folder/Sub-Divider & Document Type they select from the dropdown fields.
3. SmartScan - this page allows users to drag multiple documents into the ARIE SmartScan page so that ARIE can auto file documents using your active distribution rules.
4. File Single - this page allows users to import or scan a new document in from their computer.
5. Search - this page allows users to globally search documents they have access to. Users can also open documents from the Search page so that they can view or edit them in a separate window (File Review page).
6. Workflow - this page allows users to view their assigned workflow tasks. Users can also open

documents from the Workflow page so that they can update the workflow in a separate window (File Review page).



## File Multiple

Here, users can drag multiple documents to a specific location in PinPoint.

1. Begin by selecting the Cabinet, Folder and Sub-Divider you would like to drag documents to, then select the Document Type/Document Tab.
2. If you would like to rename the documents you drag in, use the Document Name field, otherwise you can leave that field empty.
3. Drag the documents to the drag-and-drop location.
4. At the bottom of the page, click File To PinPoint when finished.

File Multiple

Menu

Johnny Smith (Administrators - Demo LSSP)

Log Out

Document Name:

Cabinet:

Vendors

Document Type:

Invoice

Folder:

ABC Company

Search

Document Tab:

Unpaid

Sub-Divider:

Invoices

Drag And Drop Here

| File Name |
|-----------|
|-----------|

Remove

Remove All

File Count = 0

Clear

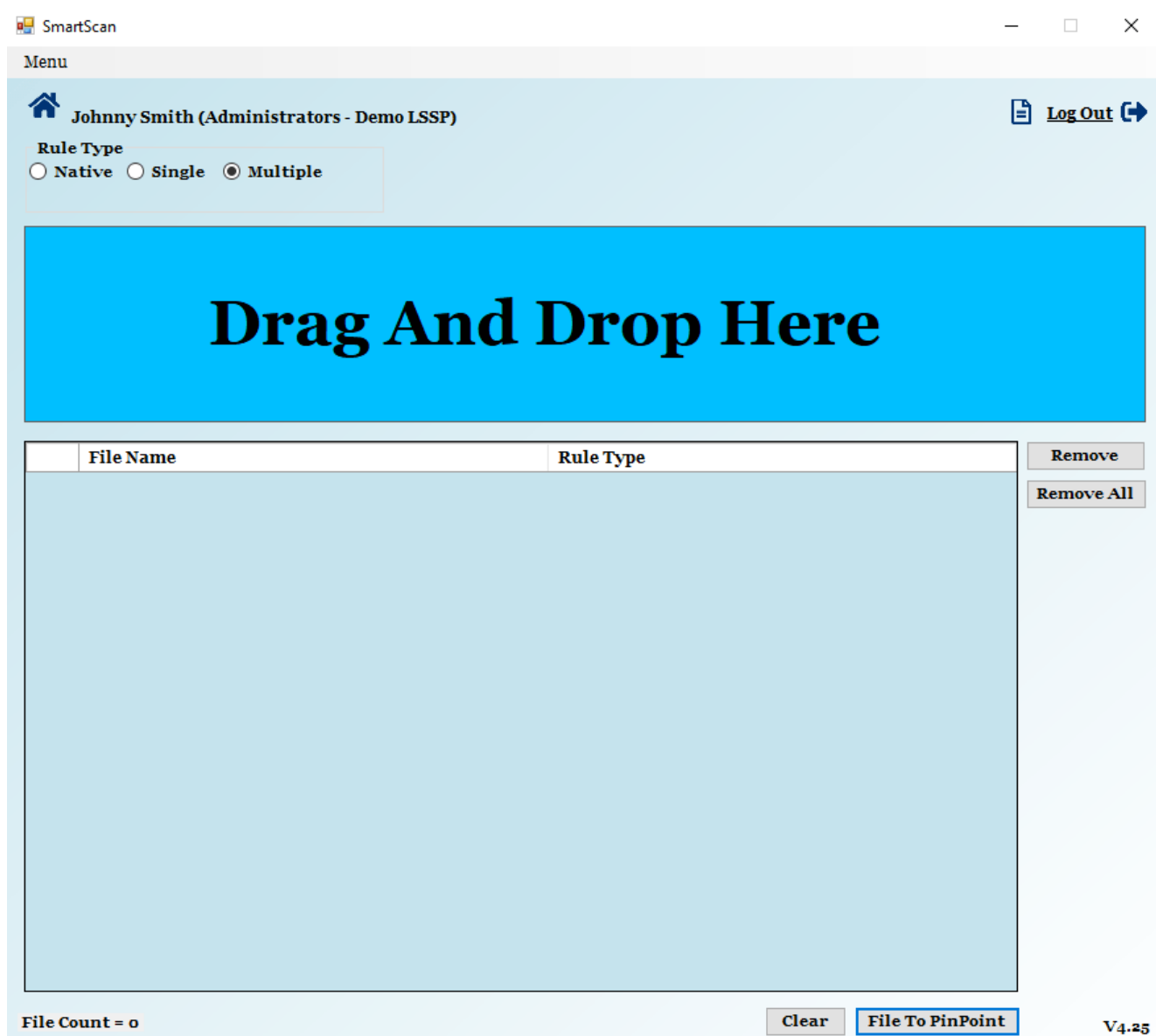
File To PinPoint

V4.25

## SmartScan

Here, users can drag multiple documents to ARIE, so they can be automatically filed based on your distribution rules.

1. Begin by selecting the Rule Type you want ARIE to use for the documents you drag in.
2. Drag the documents to the drag-and-drop location.
3. At the bottom of the page, click File To PinPoint when finished.



## File Single

Here, users can import a new document or scan a new document in from their computer.

To import a new document from your computer:

1. Click File
2. Click Open From
3. Click From Computer
4. Select the document you want to import, then click Open.
5. Fill out the required document information, then click Save when finished.

To scan a new document in from your computer:

1. Click File
2. Click New Document
3. Click From Scanner
4. Select the scanner and parameters, then click Scan.

5. Fill out the required document information, then click Save when finished.

**File Review**

DocID: DocID **Save**

Document Name:

Document Date: Wednesday, December 16, 2020

Document Type: Select

Document Tab: Select

Cabinet: Select

Folder:  **Search**

Sub-Divider:

| Field Name  | Field Value |
|-------------|-------------|
| Folder Name | A           |

**Metadata:**

| Field Name  | Field Value |
|-------------|-------------|
| Description |             |

**Workflows:** Select All **Save**

File Edit View Document Comments Form Tools Window Help

Open... Standard View Edit Form

No Properties

## Search

Here, users can search globally for documents they have access to, as well as open documents so they can sign/annotate them at the File Review page.

Below are the different search filters you can utilize:

1. Document Name
2. DocID
3. Date Range
4. Document Type/Document Tab
5. Cabinet/Folder/Sub-Divider
6. Document Content
7. Document Metadata
8. Folder Metadata
9. Document Notes
10. Tags

To open a document to the File Review page for viewing, editing or updating workflow, click the Document Name or the DocID of the document you want to open. Be sure to click Save at the top or bottom of the page to save any changes made to the document.

Search

Menu

Johnny Smith (Administrators - Demo LSSP)

Document Name:

From: Wednesday, December 16, 2019

Document Type: Select All

Document Tab:

Content:

Document Metadata:

Notes:

Tag: Select All

DocID:

To: Wednesday, December 16, 2019

Cabinet: Select All

Folder:

Sub-Divider:

Folder Metadata:

Sort By: DocID

Order by: Descending

Search

Clear

Log Out

| DocID | Document Name                       | Document Type  | Document Tab | Cabinet        | Sub-Divider | Folder      | Document Date | Entry Date         | Status     |
|-------|-------------------------------------|----------------|--------------|----------------|-------------|-------------|---------------|--------------------|------------|
| 19108 | Vendor Invoice_000001               | Vendor Invoice | 2019         | Vendors        | Invoices    | Acme Inc.   | 8/9/2018      | 12/16/2020 2:37 PM | Checked In |
| 19107 | Vendor Invoice_439849               | Vendor Invoice | 2019         | Vendors        | Invoices    | ABC Company | 8/9/2018      | 12/16/2020 2:37 PM | Checked In |
| 19106 | Vendor Invoice_439849               | Vendor Invoice |              | Vendors        | Invoices    | ABC Company | 8/9/2018      | 12/16/2020 2:37 PM | Checked In |
| 19105 | Vendor Invoice_000001               | Vendor Invoice |              | Vendors        | Invoices    | Acme Inc.   | 8/9/2018      | 12/16/2020 2:37 PM | Checked In |
| 19104 | PinPoint - Admin Exercise Guide.pdf |                |              | Accounting     | Default     | 01/05/2020  | 12/16/2020    | 12/16/2020 2:34 PM | Checked In |
| 19103 | PinPoint Slim User WalkThrough.pdf  |                |              | Accounting     | Default     | 01/05/2020  | 12/16/2020    | 12/16/2020 2:34 PM | Checked In |
| 19102 | PinPoint - Start Here.pdf           |                |              | Accounting     | Default     | 01/05/2020  | 12/16/2020    | 12/16/2020 2:34 PM | Checked In |
| 19101 | PinPoint Slim User WalkThrough.pdf  |                |              | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:33 PM | Hold       |
| 19100 | PinPoint - Admin Exercise Guide.pdf | Agenda 2       |              | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:33 PM | Checked In |
| 19099 | PinPoint - Start Here.pdf           | LSSP Document  | Default      | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:33 PM | Checked In |
| 19098 | Vendor Invoice_                     | Vendor Invoice | 2019         | Vendors        | Invoices    | Acme Inc.   | 12/16/2020    | 12/16/2020 2:29 PM | Checked In |
| 19097 | PinPoint - Admin Exercise Guide.pdf | LSSP Document  | Default      | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:28 PM | Checked In |
| 19096 | PinPoint Slim User WalkThrough.pdf  | LSSP Document  | Default      | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:28 PM | Checked In |
| 19095 | PinPoint - Start Here.pdf           | LSSP Document  | Default      | New Cabinet    | Default     | New Folder  | 12/16/2020    | 12/16/2020 2:28 PM | Checked In |
| 19094 | Vendor Invoice_000001               | Vendor Invoice | 2019         | Vendors        | Invoices    | Acme Inc.   | 8/9/2018      | 12/16/2020 2:28 PM | Checked In |
| 19093 | Vendor Invoice_439849               | Vendor Invoice | 2019         | Vendors        | Invoices    | ABC Company | 8/9/2018      | 12/16/2020 2:28 PM | Checked In |
| 19092 | LSSP Client Information Form.pdf    | Errick Invoice | Default      | Sample Cabinet | 2019        | ABC Clinics | 12/16/2020    | 12/16/2020 9:59 AM | Checked In |
| 19091 | LSSP Client Information Form.docx   | Errick Invoice | Default      | Sample Cabinet | 2019        | ABC Clinics | 12/16/2020    | 12/16/2020 9:59 AM | Checked In |
| 19090 | LSSP Logo.jpg                       | Errick Invoice | Default      | Sample Cabinet | 2019        | ABC Clinics | 12/16/2020    | 12/16/2020 9:59 AM | Checked In |
| 19089 | New File Import Test                | LSSP Document  |              | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 5:05 PM | Checked In |
| 19088 | Scan Test                           | LSSP Document  |              | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 5:02 PM | Checked In |
| 19087 | Company Contact Change.pdf          | LSSP Document  |              | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 4:54 PM | Checked In |
| 19086 | LSSP Client Information Form.docx   | LSSP Document  |              | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 4:54 PM | Checked In |
| 19085 | Company Contact Change.pdf          | Agenda 2       | ALL          | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 4:49 PM | Checked In |
| 19084 | LSSP Client Information Form.docx   | Agenda 2       | ALL          | Sample Cabinet | 2019        | A           | 12/15/2020    | 12/15/2020 4:49 PM | Checked In |
| 19083 | PinPoint Slim User WalkThrough.pdf  | LSSP Document  |              | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 4:48 PM | Checked In |
| 19082 | LSSP Client Information Form.pdf    | LSSP Document  | Default      | Sample Cabinet | 2020        | A           | 12/15/2020    | 12/15/2020 4:41 PM | Checked In |
| 19081 | LSSP Client Information Form.docx   | LSSP Document  | Default      | Sample Cabinet | 2019        | A           | 12/15/2020    | 12/15/2020 4:41 PM | Checked In |

## Workflow

Here, users can view the workflow tasks they have assigned to them, as well as open documents so they can update the workflow task at the File Review page.


Below are the different search filters you can utilize:

1. Workflow Name
2. Task
3. Cabinet/Folder/Sub-Divider
4. Document Type
5. Document Content
6. Document Metadata

To open a document to the File Review page for viewing, editing or updating workflow, click the Document Name or the DocID of the document you want to open. Be sure to click Save at the top or bottom of the page to save any changes made to the document.

## Menu

Johnny Smith (Administrators - Demo LSSP)

 Log Out Workflow: Task: Cabinet: Folder:   Sub-Divider: Document Type: Content: Metadata: List Next: Sort By:  Order by: 

V4.25

|   | DocID | Document Name         | Workflow        | Task   | Document Type  | Cabinet | Folder      | Start Date         | Due Date           |
|---|-------|-----------------------|-----------------|--------|----------------|---------|-------------|--------------------|--------------------|
| ▶ | 19108 | Vendor Invoice_000001 | Sample Workflow | Review | Vendor Invoice | Vendors | Acme Inc.   | 12/16/2020 2:37 PM | 12/17/2020 2:37 PM |
|   | 19107 | Vendor Invoice_439849 | Sample Workflow | Review | Vendor Invoice | Vendors | ABC Company | 12/16/2020 2:37 PM | 12/17/2020 2:37 PM |
|   | 19106 | Vendor Invoice_439849 | Sample Workflow | Review | Vendor Invoice | Vendors | ABC Company | 12/16/2020 2:37 PM | 12/17/2020 2:37 PM |
|   | 19105 | Vendor Invoice_000001 | Sample Workflow | Review | Vendor Invoice | Vendors | Acme Inc.   | 12/16/2020 2:37 PM | 12/17/2020 2:37 PM |
|   | 19098 | Vendor Invoice_       | Sample Workflow | Review | Vendor Invoice | Vendors | Acme Inc.   | 12/16/2020 2:29 PM | 12/17/2020 2:29 PM |
|   | 19094 | Vendor Invoice_000001 | Sample Workflow | Review | Vendor Invoice | Vendors | Acme Inc.   | 12/16/2020 2:28 PM | 12/17/2020 2:28 PM |
|   | 19093 | Vendor Invoice_439849 | Sample Workflow | Review | Vendor Invoice | Vendors | ABC Company | 12/16/2020 2:28 PM | 12/17/2020 2:28 PM |