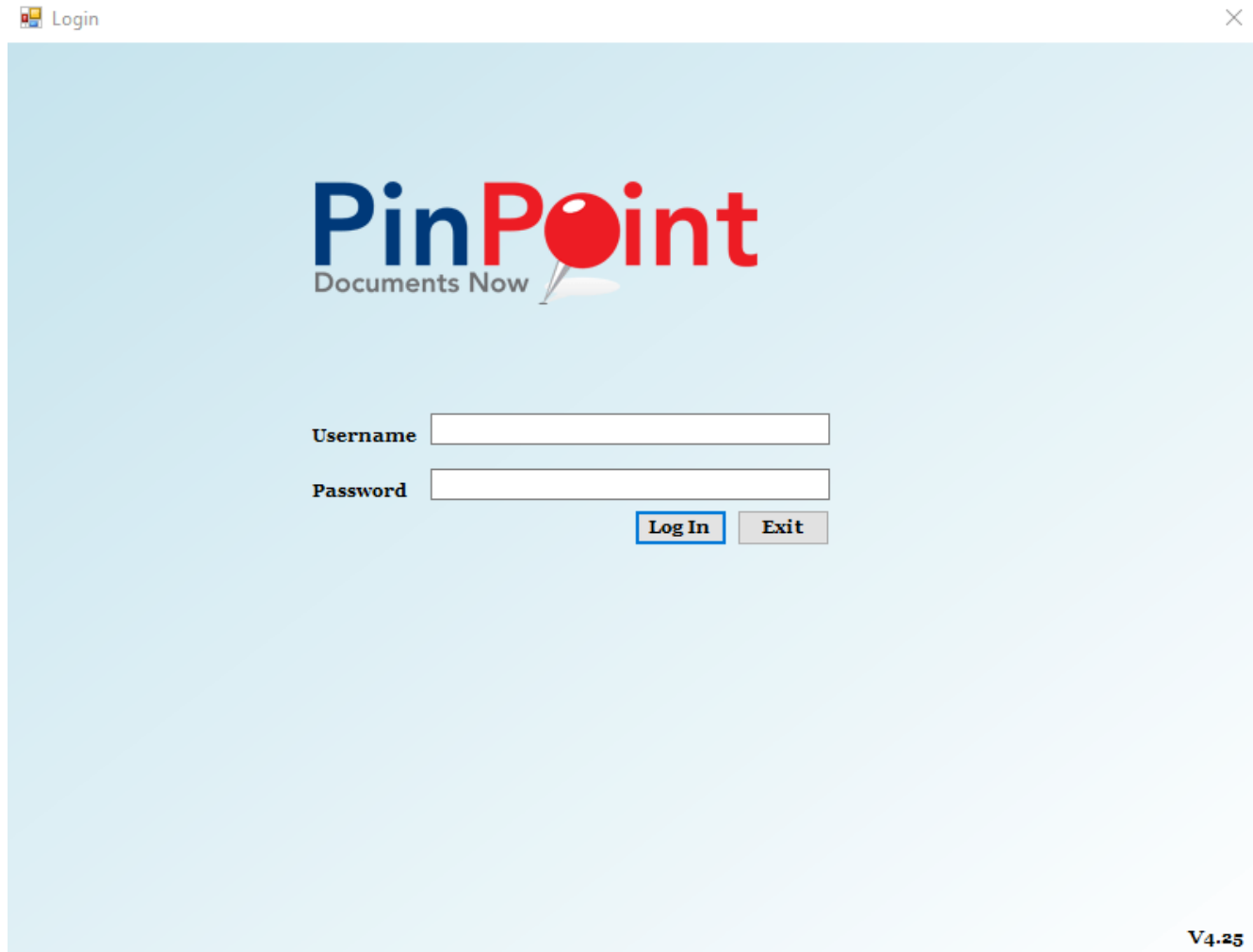


Using the PinPoint Desktop Application

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



PinPoint
Documents Now

Username

Password

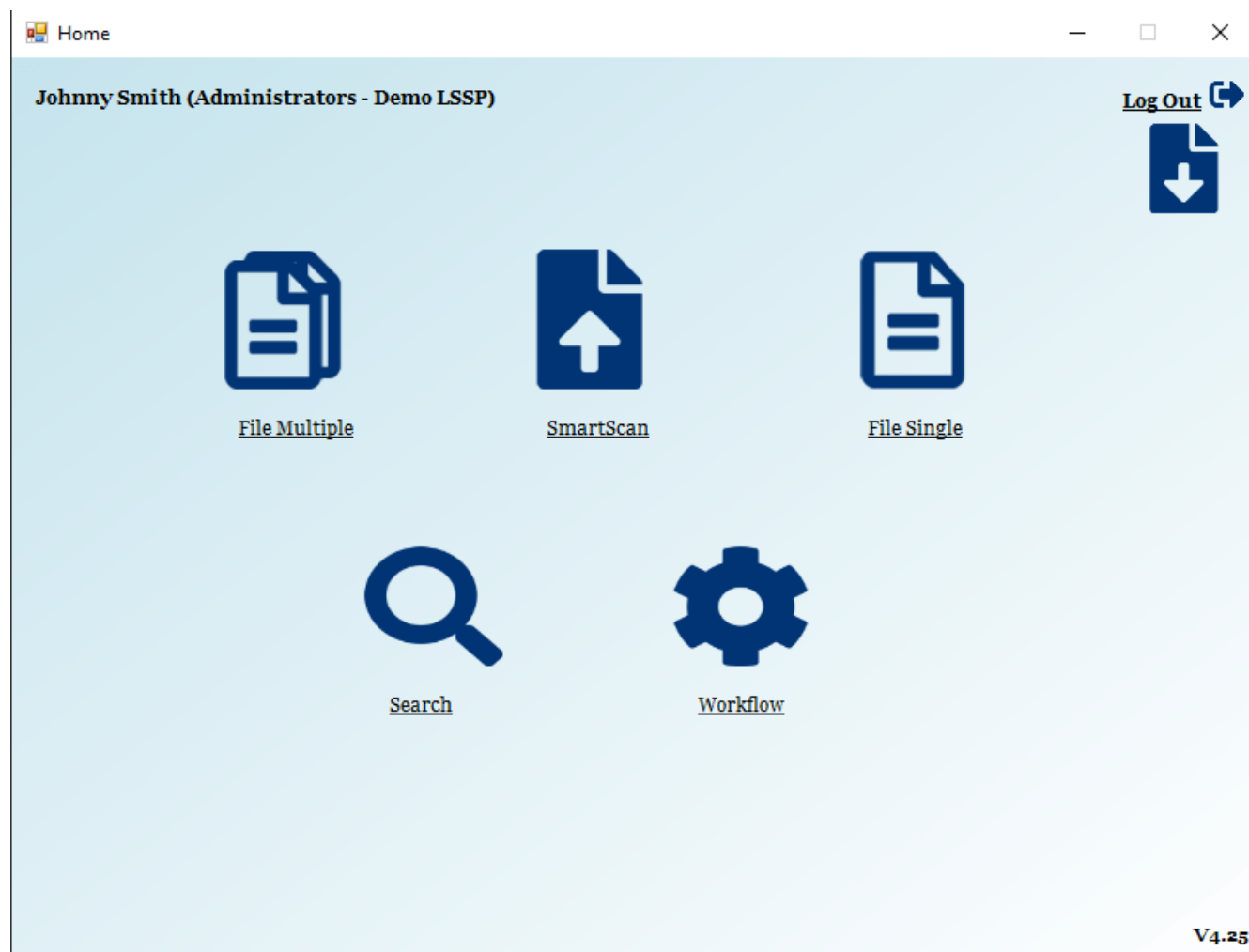
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Home

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

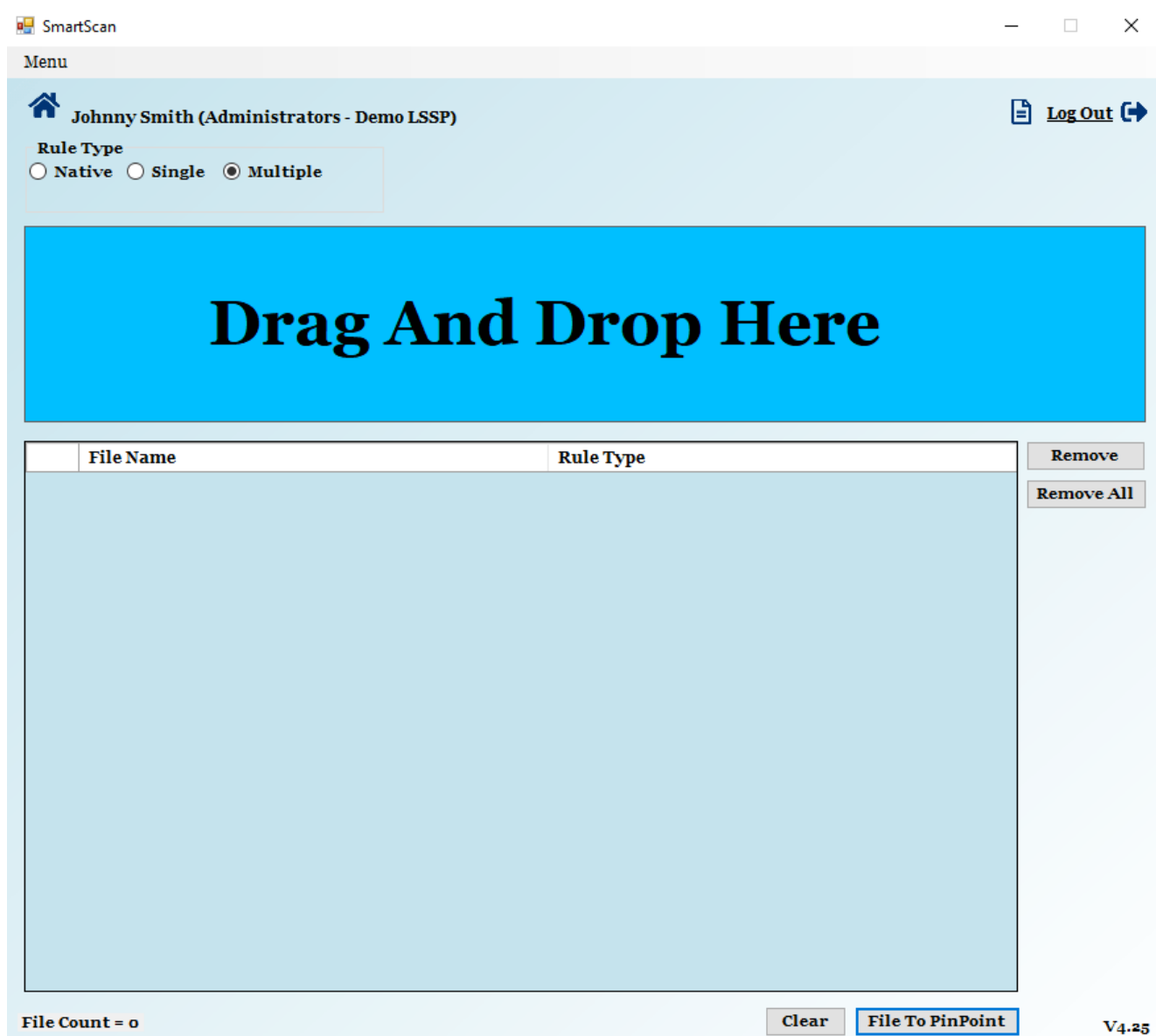
File To PinPoint

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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:

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	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