Introduction

This guide includes information on some of the most commonly used functions in PinPoint, including how to add, search and edit documents.

If your user account has additional permission to create structure, workflow or access to other administrative tasks, please see the PinPoint Admin Guides.

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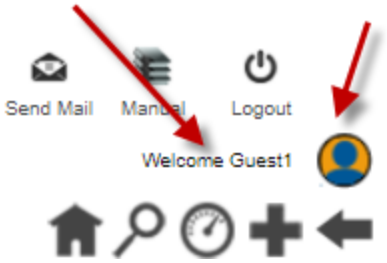
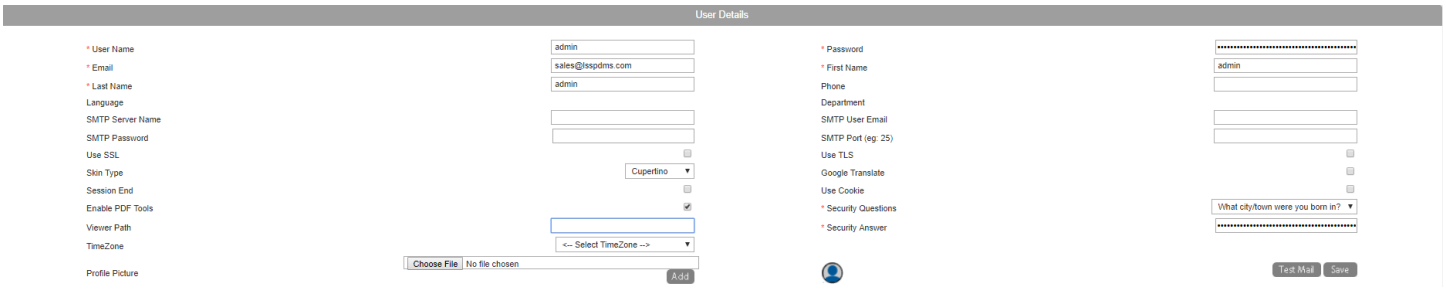
Managing your User Profile

To access your profile, click "Welcome [username]" or your profile picture, located in the upper right-hand corner of PinPoint.

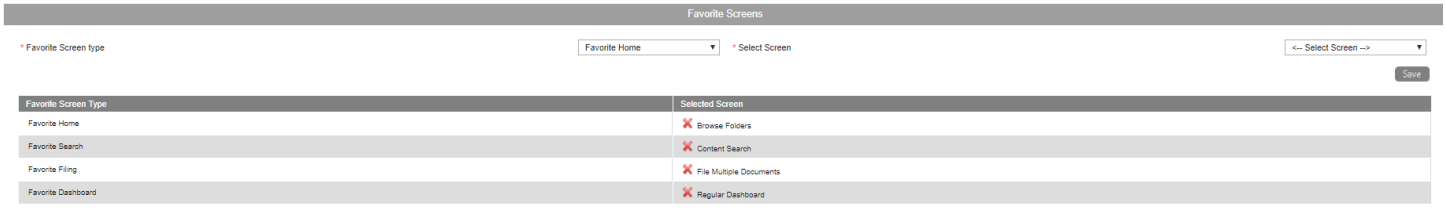


User Details:
*D*efine your basic user preferences, including your username, email, password, security question/answer, contact information, language and department. If you plan on emailing from PinPoint, you will need to ensure that your SMTP information has been filled in, as well.



Please Note: The first time you log in you will be asked to select a security question and answer. Until you do so, each time you log in, you will be sent directly to your profile rather than your selected Home Page.

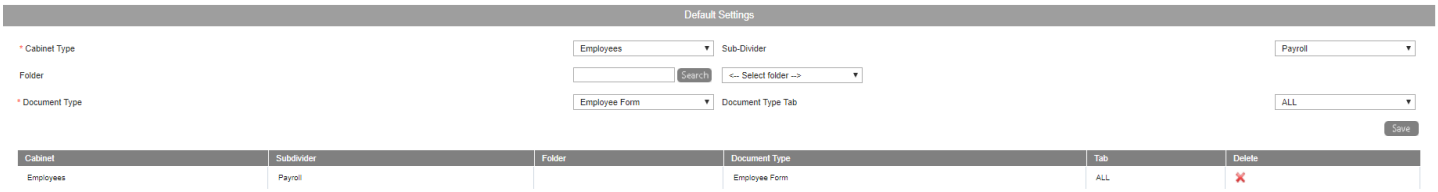
Favorite Screens:
Define your "favorite" screens, which can be accessed using the icons in the upper right-hand corner of PinPoint. **This is not Required.**



You can define your favorite Home screen, Search screen, Filing screen, and favorite Dashboard screen you prefer.

1. Begin by selecting which button you would like to set first ("Favorite Screen Type").
2. Under "Select Screen", choose which screen you would like to assign to the favorite button.
3. Repeat steps above for the other favorite buttons.
4. Each button will only have certain screens to choose from.

Default Settings:
*D*efine your default settings, which will be the settings that auto-populate when you want to file/search for documents. The default settings can also be changed/removed at any time. **This is not Required.**



Please Note: After your default settings are saved, you must close out of PinPoint and log back in for the settings to go into effect.

Adding PinPoint as a Trusted Site

Required, only for Internet Explorer

When you add a web site to the Trusted Sites zone, you are ensuring the computer that files your download or that you run from the web site will not damage your computer or data. Not adding PinPoint as a trusted site will prevent documents from being saved (if annotated) or uploaded.

How to add trusted sites to Internet Explorer

1. On your Internet Explorer window, select the Gear icon, followed by Internet Options.
2. You will see a pop-up. Go to the Security tab.
3. Select the Trusted Sites icon, then click on the Sites button.
4. Enter https://manageedocs.com into the Add this website to the zone box, then click Add, and Close.

Installing PDFXViewer

Optional, only for Internet Explorer

On your user profile, you can enable PDFXViewer as the default PDF viewer only in PinPoint.

1. To enable PDFXViewer, check the box on your profile for "Enable PDF Tools".
2. Save your profile changes, then close all instances of Internet Explorer.
3. When you log back in and open a document or attempt to add a new one, you will be prompted to download and install PDFXViewer (by Tracker Software).
4. Click Run when prompted to install PDFXViewer.
5. After installing (default options are all fine, and only the free version is needed), close Internet Explorer once more, then log back in.
6. When you log in to PinPoint next time you may have to click "Allow" for PDFXViewer to run.

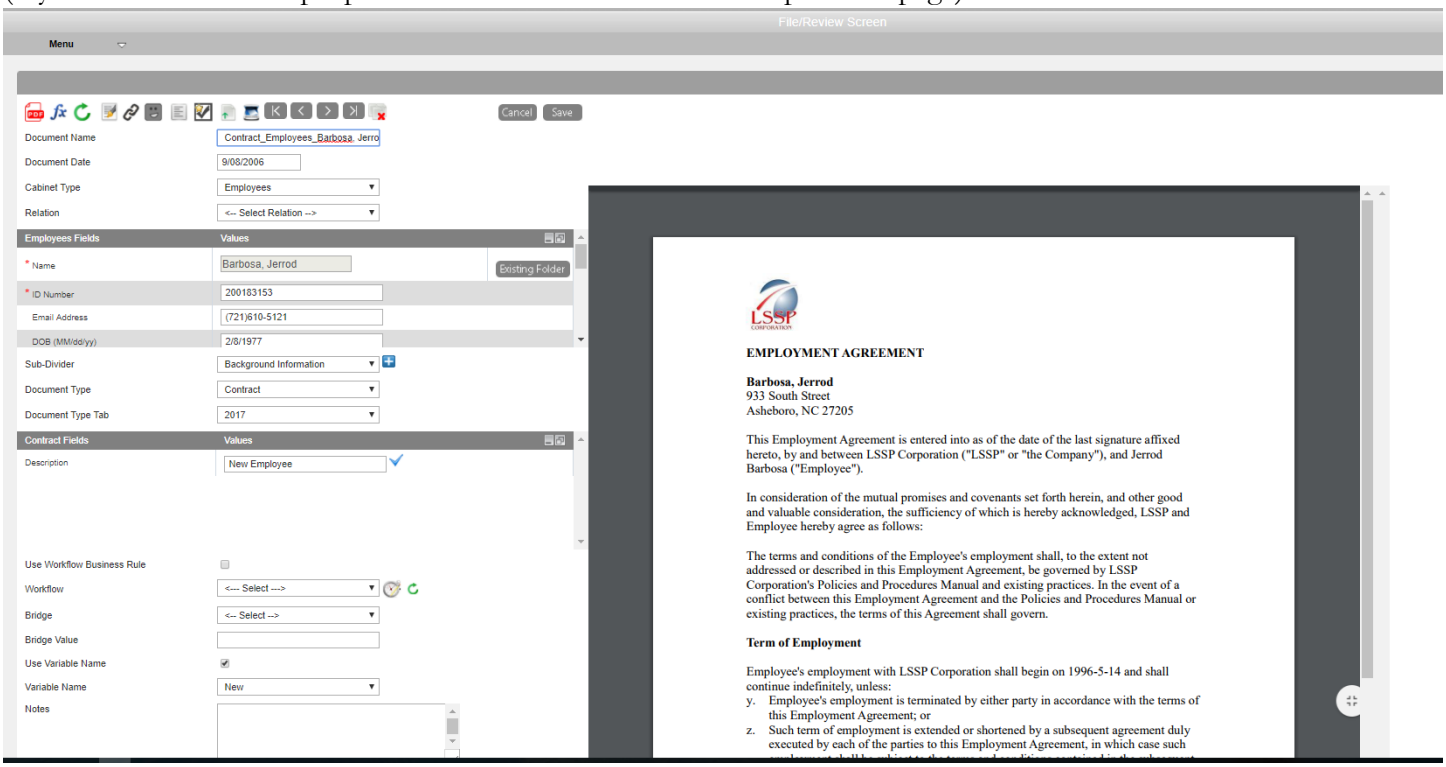
Installing Dynamic Web Twain

To scan directly into PinPoint, you will need to install the driver for Dynamic Web TWAIN, as well as have a TWAIN-compliant scanner set up for your computer.

1. When opening a document or adding a new one for the first time you will get the notice to install Dynamic Web Twain in the yellow message box at the bottom of the browser.
2. The first thing you may see is the message in the yellow box at the bottom of the browser asking to run the Microsoft License Manager DLL. Click Allow.
3. Next the yellow box message will ask if you want to install Dynamic Web TWAIN. Click Install.
4. After completing the installation process (default options are fine), close all instances of your browser and log back in.

Adding a Document

You have the option to either import a document from your workstation, or scan a document into PinPoint directly (if your scanner has the proper TWAIN driver to do this – see previous page).



1. Begin by going to **Filing > Single Document**
2. Click the import icon then choose your file to upload, or click the scanner icon to scan a document in directly.
3. If the document is a PDF, the image will show immediately on the right-side of the screen after importing/scanning, though for all non-PDF documents, you will see a temporary image until ARIE is able to create the viewable PDF for the document.
4. If you wish to change the Document Name, feel free to do so any time before saving.
5. You can change the Document Date at any time, though if you leave this field alone, the Document Date will be set as the entry date until changed.
6. Select the Cabinet you want to file this document to.
7. If you are adding this document to an existing folder within the cabinet you selected, then click on the "Existing Folder" button and select the folder you want to file the document to. If you need to create a new folder for this document, instead of clicking the "Existing Folder" button, simply type in the required folder fields and continue to the next step.

8. After the folder is chosen, whether it is an existing or new folder, you must select the Subdivider within the folder you want to file the document to.

9. Select the Document Type and Document Tab for this document.

10. Fill in the required document metadata fields assigned to that document type.

11. You may add any Notes needed for the document (text in the notes can be used for searching on a document).

12. Click Save when finished.

Adding Multiple Documents

1. Begin by going to **Filing > Multiple Documents**
2. Select the Document Type and Document Type Tab you would like to file the document(s) as.
3. Select the Cabinet, Folder and Subdivider you would like to file the document(s) to.
4. Drag-and-Drop your document(s) in the box. **Please Note:** Whatever you have selected for the Doc Type/Tab, and the Cabinet, Folder and Subdivider the moment you drop the documents in the box, that is where they will be filed.
5. Repeat steps 2-4 for the next document(s).
6. Click "Import" All whenever you are finished dragging documents in.

This drag-and-drop function is helpful when you several documents that you need to add at one time, or multiple documents that need to get filed to separate folders. Users can continuously change the required fields, then drag-and-drop new documents in as those fields get changed. Just click **Import All** once you have dropped in all your files, and they will all be added to the system in the location you specified when dragging them in.

Users can also access a different drag-and-drop method from two different locations in PinPoint:

Locating > Browse Folders

1. Narrow down to the cabinet, folder, and subdivider you would like to file the document(s) to.
2. Click on the paper icon with the plus sign next to the folder you want, and the system will ask you if you want to use the drag-and-drop. Click OK.
3. Drag the document(s) into the file box.
4. If you would like to rename any files being added, highlight the file name from the box on the right and type the name you would like using the Document Name field.
5. Select the Document Type and Document Tab you would like to file the highlighted document as, then complete any required document metadata fields.
6. Click Save. **Please note:** clicking "Import All" will file all documents in the box on the right into the same location with the same document name and metadata. Clicking save only files the document you have highlighted in the box on the right.

Click Here for a short video on using this drag-and-drop method.

Locating > Folder Details

1. Narrow down to the cabinet and folder you'd like to file the document(s) to.
2. Click on the Fx icon above the document grid, then click on the icon to the right of "Drag File".
3. Drag the documents into the file box.
4. If you would like to rename any files being added, highlight the file name from the box on the right and type the name you would like using the Document Name field.
5. Select the Document Type and Document Tab you would like to file the highlighted document as, then complete any required document metadata fields.
6. Click Save. **Please note:** clicking "Import All" will file all documents in the box on the right into the same location with the same document name and metadata. Clicking save only files the document you have highlighted in the box on the right.

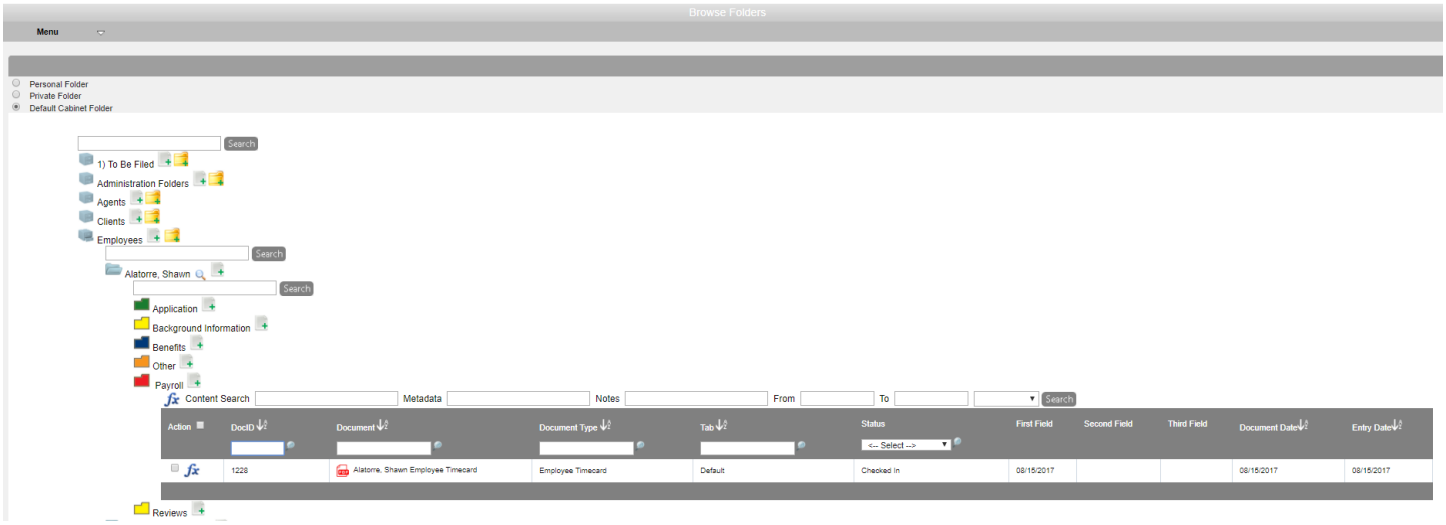
Locating Documents

Choosing your search method is often a matter of personal preference, or your ultimate goal. All search methods can be accessed under the **Locating** menu in the Menu at the top of the screen.

Browse Folders

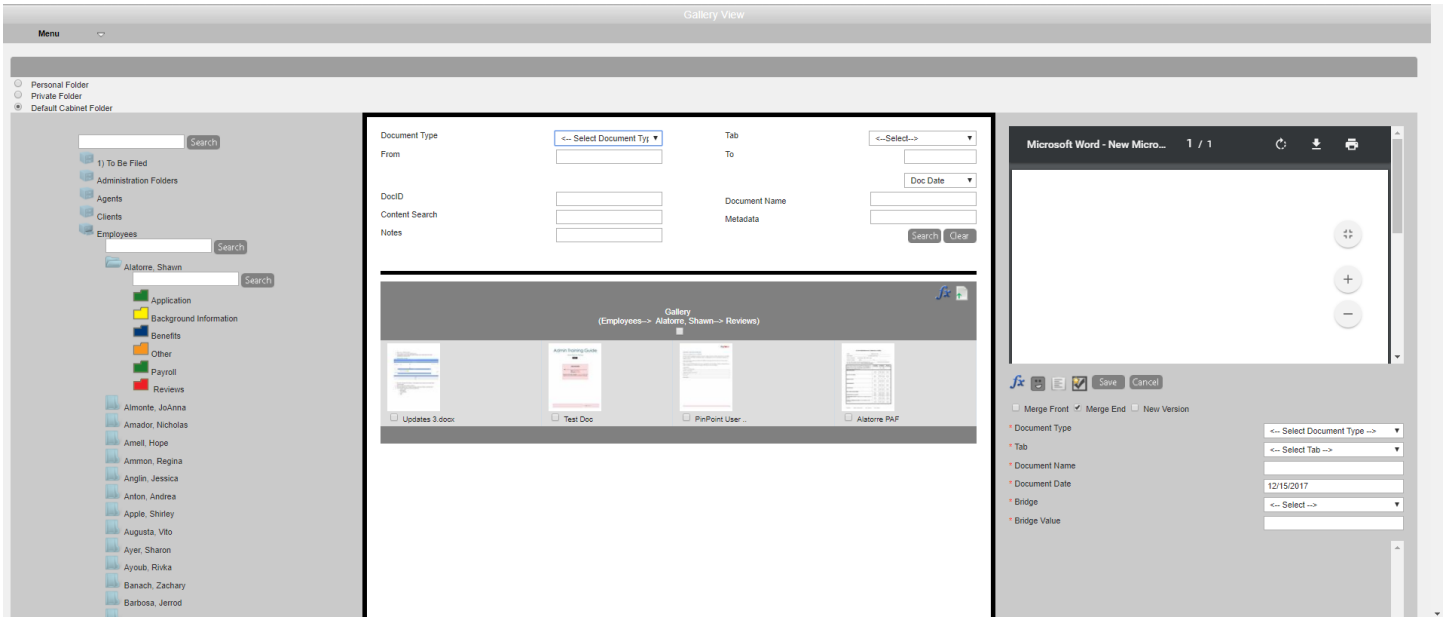
This cascading drill-down screen allows you to drill-down through each layer in the PinPoint infrastructure, starting with the cabinet, then folder and then the subdivider.

To watch a short video on the Browse Folders option, click here.



Gallery View

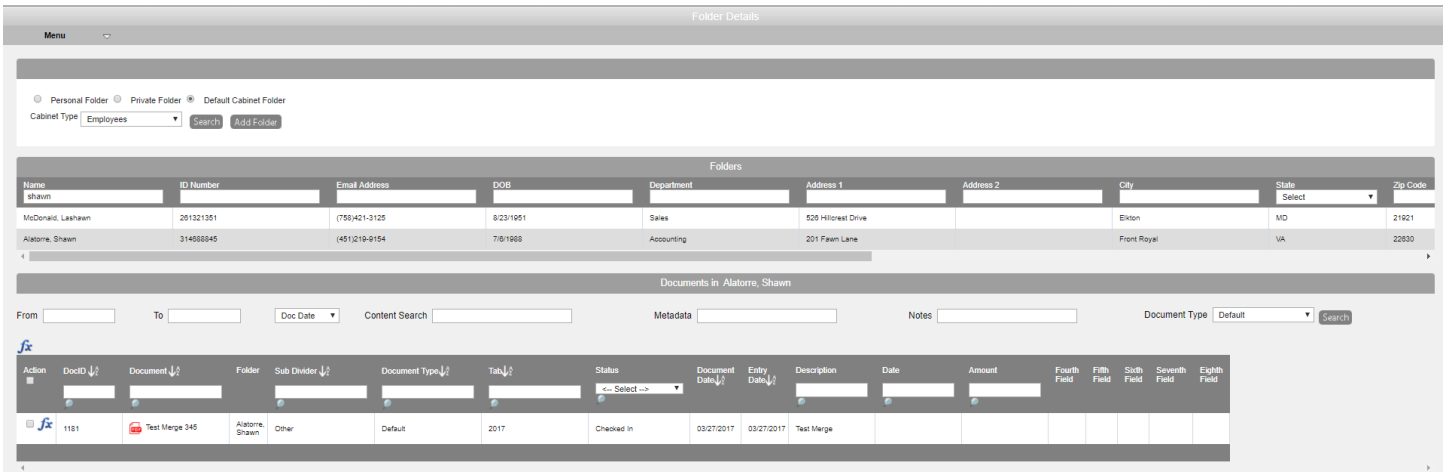
This search is a lot like the Browse Folders search, though once the user drills-down to the subdivider, all documents will have the first page displayed with a preview.



Folder Details

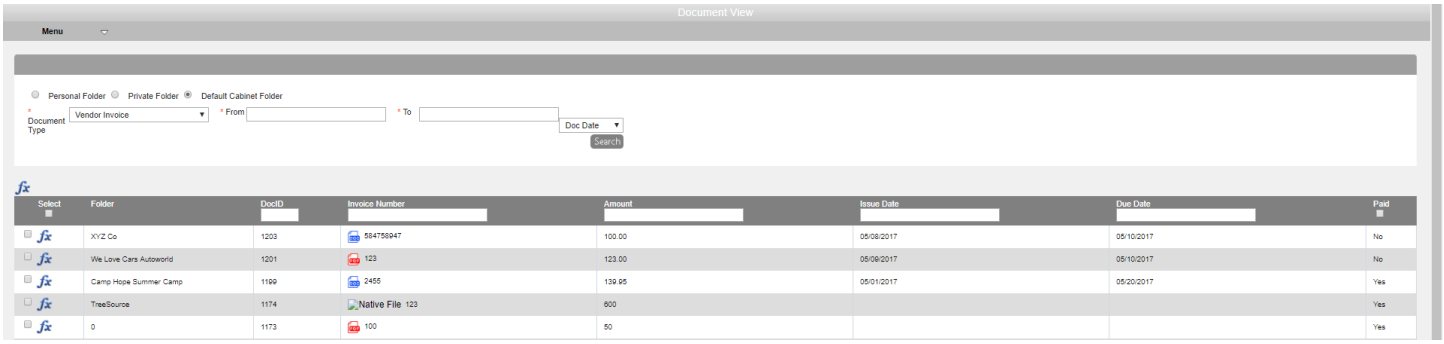
This search allows users to search for folders within the selected cabinet, using all the folder metadata fields. The top level is going to be your cabinets, the middle section will be your folders within that cabinet and the third section will be all documents within that folder.

To watch a short video on the Folder Details option, click here.



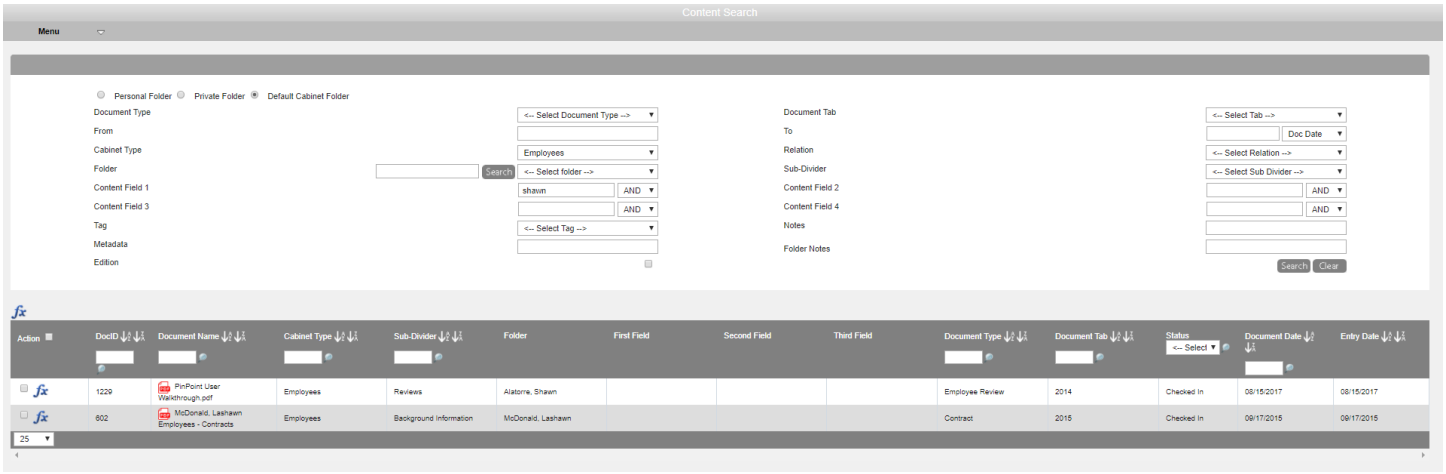
Document View

This is a basic search that will allow you to search on a certain document type and its metadata, while including a date range (if needed). You will notice similar search options within the document grid to help you narrow down your list of results. Across the board will be your metadata fields you associate with each document type.



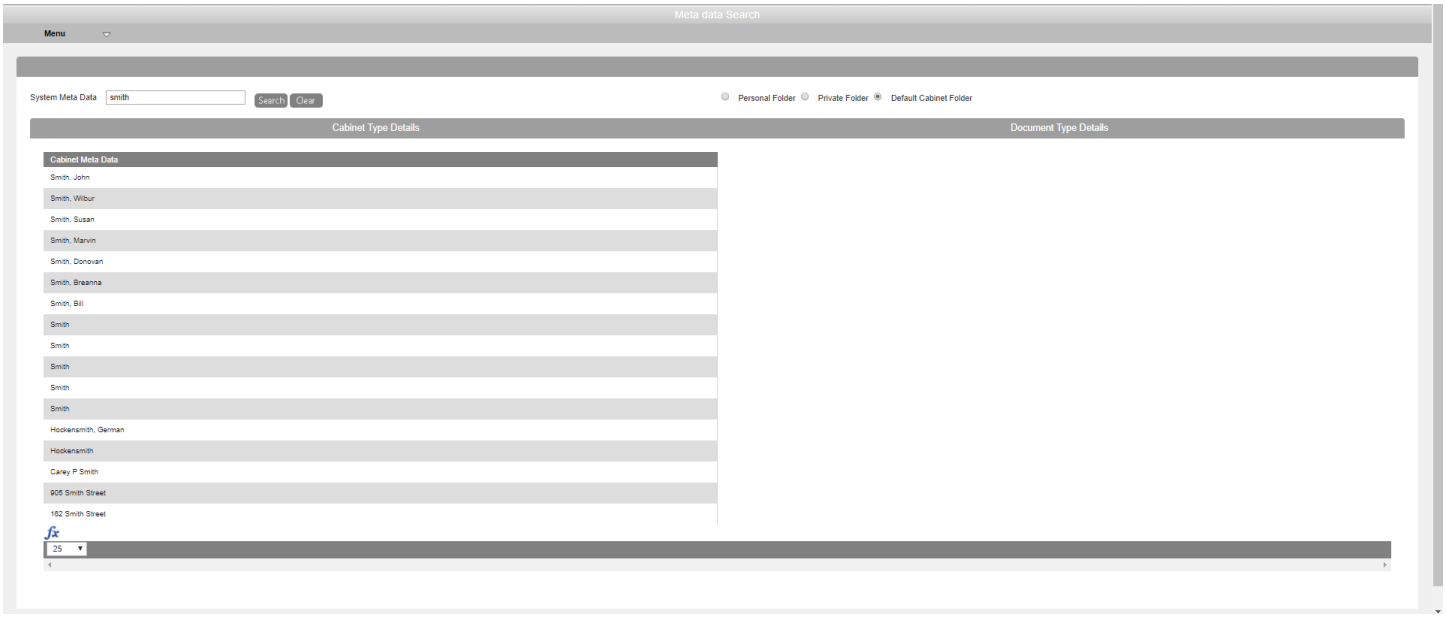
Content search

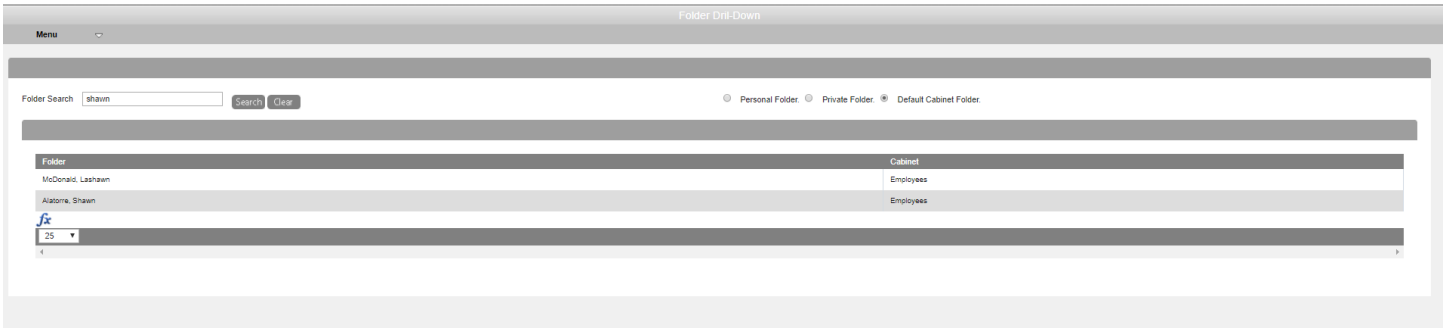
This is your "catch-all" search. The Content Search is a global search and is another way to include an OCR search, while also searching on various other criteria. For example: Cabinet Type, Document Type, date range, subdivider, and tags). To watch a short video on the Content Search option, click here.



Metadata Search

This search is helpful when you want to pull up any folders and/or document types that contain a certain piece of metadata. Remember, this is not searching on the content of the document, but on the metadata (demographic information) that a user entered as part of the document or folder information.



Folder Drill-Down Search

This search allows for users to locate individual folders. By typing in any part of the folder name, the system will locate all folders contained in your search. When users search for particular folders, the system will also include the cabinet that particular folder, or folders, belong to.