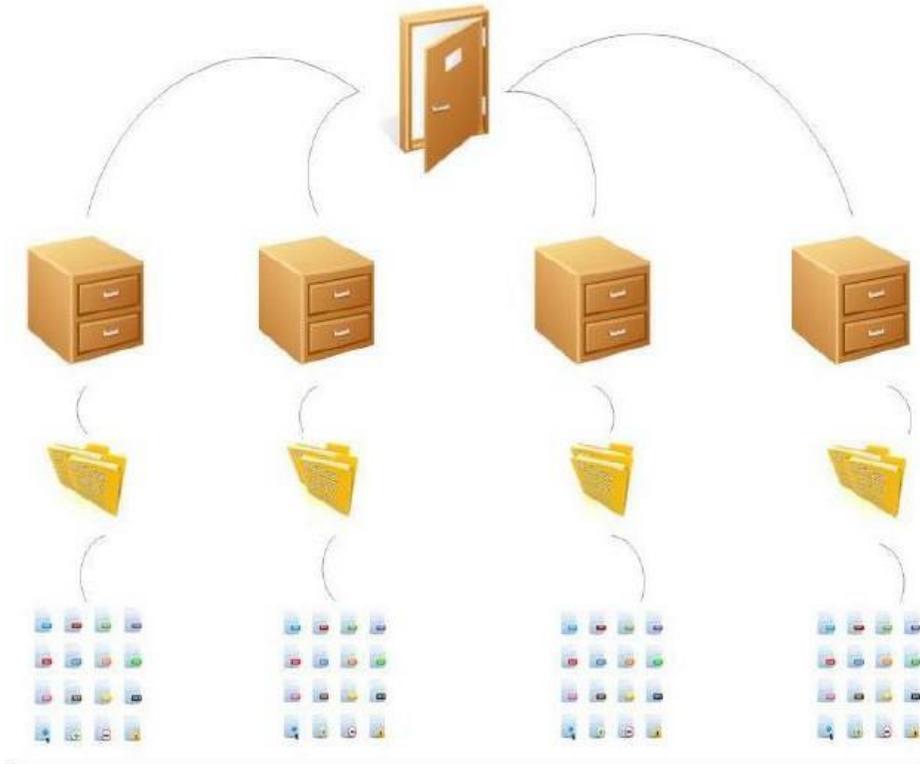


PINPOINT USER GUIDE



HIERARCHY:

1. Cabinets – Entities such as Vendors, Employees, Clients, Patients, Cases, etc.
2. Folders – Cabinets can hold an unlimited number of folders, which can have multiple field labels.
3. Sub-Dividers – These are like the colored tabs used to organize document types within a folder.
4. Document Types – Types of documents such as Invoices, Contracts, Charts, Drawings, Projects, etc. Each document type can include its own metadata fields.
5. Document Tabs – These are used as a further layer to help organize a document type. Each document type has its own set of tabs.

USER DASHBOARD:

The Dashboard enables users to manage their recent files, checked-out documents, and active workflow tasks. An Fx action button is located next to each document so you do not have to leave the Dashboard screen to perform an action.

Recent Documents: Shows the documents only you have recently added/updated.

Checked-Out Documents: Shows documents you currently have checked-out of PinPoint.

Workflow Tasks: Shows all workflow tasks assigned to you.

FOLDER DETAILS:

From your menu, click **Locating**, then click **Folder Details** (or use the “Folders” quick action button below the menu).

Using the **Folder Details** search, users can search for folders using all the folder label fields available.

The top section of this screen is where you choose your cabinet, the middle section displays all folders within the selected cabinet and the third section displays all documents within the selected folder.

Search Documents

1. Begin by selecting the cabinet you want to open.
2. You can use any number of the folder fields to locate the folder you want.
3. Select the folder you want to open and all documents within the folder will display at the bottom of the screen.
4. At the document level, the user can then filter/sort by the following to narrow it down:
 - **Doc Name:** This allows a user to search for a document by name. This is a wildcard search, so the system will look at any part of the name for the text you fill in.
 - **Sub-Divider:** This is the third level in PinPoint. Sub-dividers are used to organize documents within folders.
 - **Workflow:** This allows the user to display only documents that are part of an active workflow the user belongs to.
 - **Date Range:**
 - **Document Date:** This is the only date a user can manually change for a document.
 - **Entry Date:** This is the date of when the document was added to PinPoint.
 - **Updated Date:** This is the date of when the document was last updated.
 - **Content:** If a user types text in this field and searches, the system will only display documents that contain that text within the pages of the document. Please keep in mind that it will likely not pick-up hand-written content.
 - **Metadata:** If a document has had any of its document metadata fields filled in, a user can search by the text that has been filled in to locate a document.
 - **Notes:** This field can be found at the bottom of the screen when you have a document open. The Notes field does not have a character limit and all text inputted can be searched on.
 - **Doc Type:** Each document that is added to PinPoint must be labeled by a document type, so this will always be a useful way to sort/filter.
 - **Status:** Each document will have a status shown. There are 4 different statuses of a document:

- **Checked In:** This is the normal status of a document in PinPoint.
- **Checked Out:** This means the document has been checked-out of PinPoint by another user. If a document is checked-out by another user, it is in read-only mode for all other users until the user who checked it out checks it back into PinPoint.
- **On Hold:** If a document has been put “On Hold”, it means it is in read-only mode, though has not been checked-out by a user.
- **Finalized:** If a document has been “finalized”, it means it can no longer be modified by any user.
- **DocID:** Each document that is added to PinPoint is automatically given a DocID by the system. The DocID is assigned based on entry order.

Drag Documents

1. Select the **Cabinet**.
2. Select the **Folder** you want to add document(s) to.
3. Click the **Fx** icon above the document grid, then click the icon to the left of **Drag & Drop**.

XYZ Company Documents

Doc Name

Sub-Divider Workflow

From To Doc Date

Content Metadata

Notes Doc Type

Status DocID

Search

fx

Document Actions

- Add New Document
- ARIE Request
- Change Doc Type
- Check-Out
- Move
- Copy
- Delete
- Drag & Drop
- Finalize
- Hold
- Manage Folders
- Merge
- Email
- Export
- Tag
- Variable Naming
- View

Folder	Sub-Divider	First Field	Second Field	Third Field	Fourth Field	Fifth Field	Sixth Field	Seventh Field	Eighth Field	Doc Type	Tab	Status	Doc Date	Entry D
XYZ Company	Contracts							No		Vendor Invoices	2010		05/16/2019	05/16/2
XYZ Company	Misc	2839083								Invoice	ALL		04/26/2019	04/26/2
XYZ Company	Invoices	8908908908	8908908908	200.00				No		Vendor Invoices	2010		04/26/2019	04/26/2
XYZ Company	Invoices	90-980-9-0	998888	100.00	04/03/2019			No		Vendor Invoices	2010		04/25/2019	04/25/2
XYZ Company	Invoices	890890890	8908908	300.00				No		Vendor Invoices	Unpaid		04/16/2019	04/16/2
XYZ Company	Contracts									Vendor Billing	Other		04/16/2019	04/16/2
XYZ Company	Contracts							No		Vendor Invoices	2010		04/01/2019	04/16/2

4. A pop-up window will appear where you can then drag the document(s) in.

The screenshot displays a user interface for document management. At the top left, there is a dashed blue box containing the text "Drag & Drop Files Here". To the right of this box is a large, empty white rectangular area. Below the drag-and-drop area, there are several input fields: "Sub-Divider" with a dropdown menu showing "<-- Select subdivider - ▾", "Doc Name" with a text input field, "Doc Date" with a text input field, "Doc Type" with a dropdown menu showing "<-- Select Doc Type -- ▾", and "Tab" with a dropdown menu showing "<--Select--> ▾". At the bottom right of the interface, there are four buttons: "Remove" (red), "Remove All" (red), "Save Single" (blue), and "Save All" (blue).

- Enter a new **Doc Name** if you wish to rename the selected document(s) on the way in.
- Select a **Doc Date** for the selected document(s) unless you want the Doc Date to be the same as the entry date.
- Select the **Sub-Divider** you want to file the selected document(s) to.
- Select the **Doc Type** and **Doc Type Tab** you would like to file the document(s) as, then complete any required document metadata fields assigned to the document type.
- Clicking the **Save Single** button will save only one selected document at a time. Clicking the **Save All** button will save all the documents at once.

Add Folders

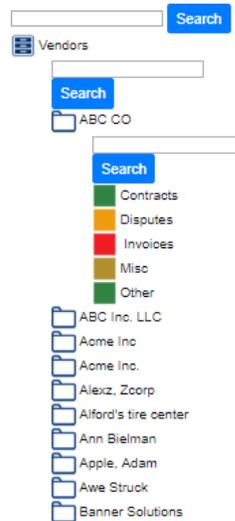
1. Select the cabinet you want to add a folder to.
2. Click **Add Folder**.
3. Fill in the required **Folder Fields** then click **Save and Exit**.

GALLERY VIEW:

From your menu, click **Locating**, then click **Gallery View** (or use the “Gallery” quick action button below the menu).

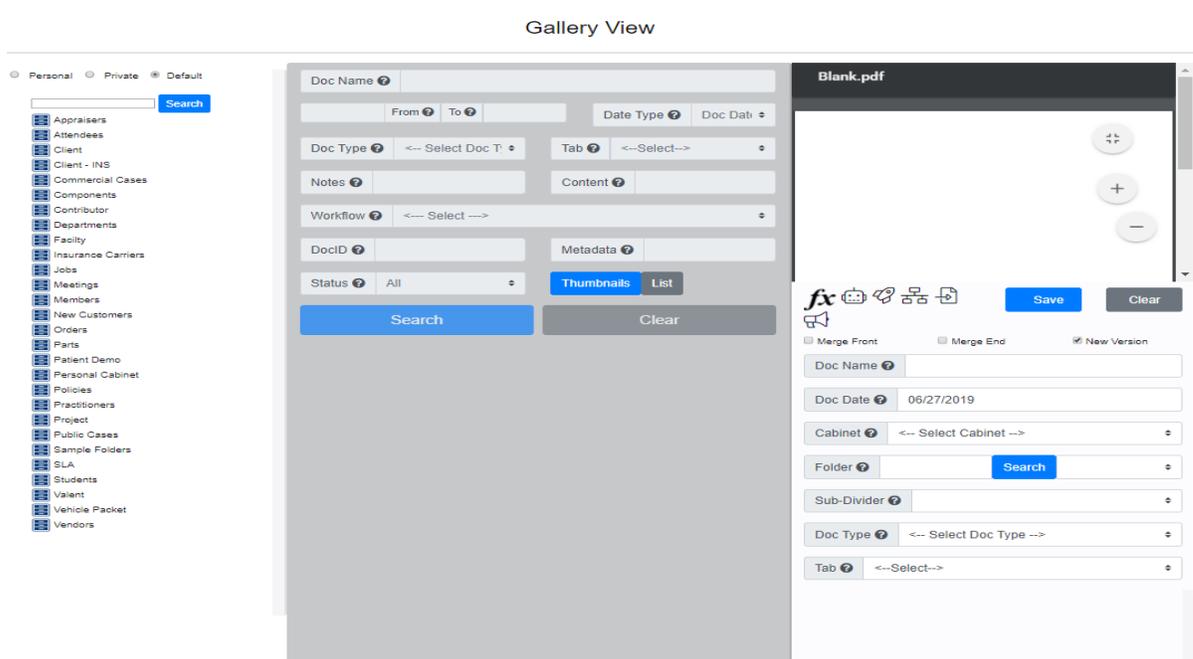
The **Gallery View** search is a cascading drill-down screen that allows you to click down through each layer in the PinPoint infrastructure, starting with the Cabinet, then Folder and then Sub-Divider.

Once you drill-down to the sub-divider, all documents will display in the middle. You have the option to view your files in a thumbnail preview, or in a list view including the document names. You may switch between the two using the blue tabs in the center of the screen.



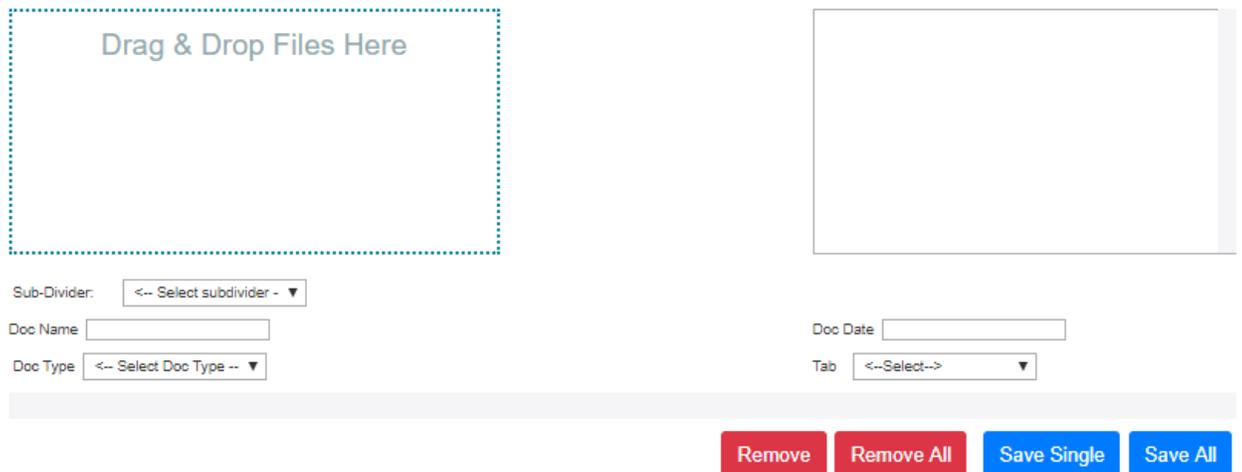
Search Documents

1. Looking to the left-side of the screen, begin by searching/selecting the cabinet you want to open, and you will then see the folders that exist within the cabinet you selected.
2. Select the folder you want to open.
3. Select the sub-divider you want to open.
4. Once you open the sub-divider, the documents within the sub-divider will be visible in the center of the screen.
5. The top-center section is used for filtering documents within the selected sub-divider, including filters such as doc name, date range, content, notes, etc.
6. When you are ready to select a document, click the name of the document to have it appear on the right side of the screen.



Drag Documents

1. Looking to the left-side of the screen, begin by selecting the cabinet you want to open.
2. Drag the documents directly to the folder or sub-divider you want to file to.
3. A pop-up window will appear where you can then drag the document(s) in.



The screenshot shows a user interface for document management. On the left, there is a dashed blue box containing the text "Drag & Drop Files Here". To the right of this box is a large, empty white rectangular area. Below the dashed box, there is a form with several fields: "Sub-Divider:" with a dropdown menu showing "<-- Select subdivider -", "Doc Name" with a text input field, "Doc Date" with a text input field, "Doc Type" with a dropdown menu showing "<-- Select Doc Type --", and "Tab" with a dropdown menu showing "<--Select-->". At the bottom right of the form, there are four buttons: "Remove" (red), "Remove All" (red), "Save Single" (blue), and "Save All" (blue).

- o Enter a new **Doc Name** if you wish to rename the selected document(s) on the way in.
- o Select a **Doc Date** for the selected document(s) unless you want the Doc Date to be the same as the entry date.
- o Select the **Sub-Divider** you want to file the selected document(s) to.
- o Select the **Doc Type** and **Doc Type Tab** you would like to file the document(s) as, then complete any required document metadata fields assigned to the document type.
- o Clicking the **Save Single** button will save only one selected document at a time. Clicking the **Save All** button will save all the documents at once.

Add Folders

1. **Right-mouse** click the cabinet you want to add a folder to.



2. Fill in the required **Folder Fields** and **Save**.

CONTENT SEARCH:

Using the **Content Search**, you can search globally throughout the entire system.

Content Search

Toggle Menu ▼

Personal Private Default

Cabinet ?

Folder ?

Search

Sub-Divider ?

Doc Type ? <-- Select Doc Type -->

Doc Type Tab ? <-- Select Tab -->

From ? **To** ?

Date Type ?

Content ? **AND** ?

Metadata ?

Notes ?

Folder Notes ?

Bridge ? <-- Select -->

Edition ?

Tag ? <-- Select Tag -->

Workflow ? <-- Select -->

Status ?

Search

Clear

Saved Searches🔍 Name ? Search

fx

Action <input type="checkbox"/>	DocID	Doc Name	Cabinet	Folder	Sub-Divider	1st Field	2nd Field	3rd Field	Doc Type	Doc Tab	Status	Doc Date	Entry Date
<input checked="" type="checkbox"/> <i>fx</i>	8885	ABC Co Invoice	Vendors	ABC CO	Misc	909090			Invoice	ALL		08/21/2019	08/21/2019

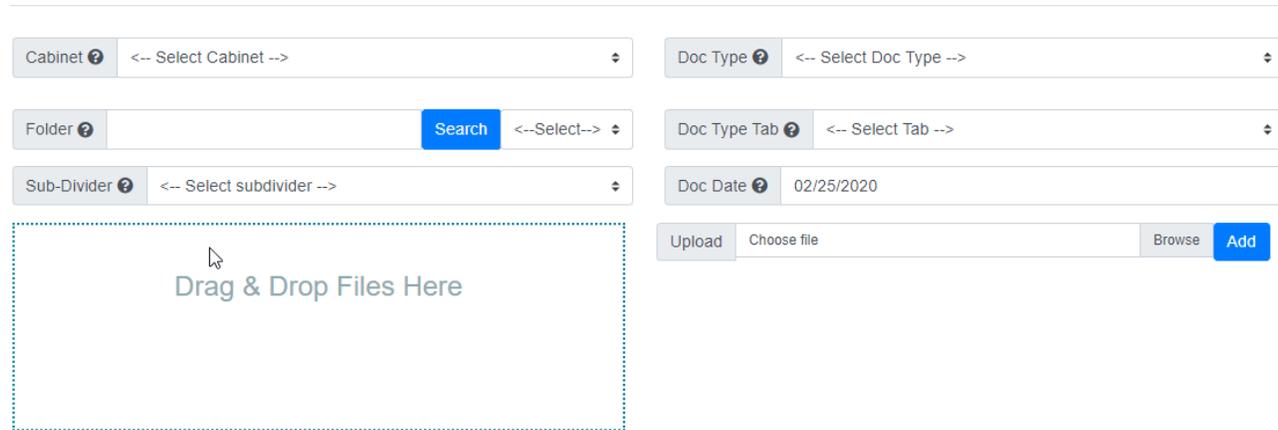
Search Documents

As a global search, you can filter/sort by multiple fields at once to narrow down a document search (documents are sorted based on entry date initially):

- **Cabinet:** This is the top-level in PinPoint. Cabinets hold the folders.
- **Folder:** This is the second level in PinPoint. Folders are within cabinets.
- **Sub-Divider:** This is the third level in PinPoint. Sub-dividers are used to organize documents within folders.
- **Doc Type/Tab:** Each document that is added to PinPoint must be labeled by a document type & tab, so this will always be a useful way to sort/filter.
- **Date Range:** To search for documents by date range, you must indicate which date type the system is to filter by. The user will have three options: Document Date, Entry Date, Updated Date.
- **Content:** If you type content in this field and search, the system will only display documents that contain that content within the pages of the document. Please keep in mind that it will likely not pick-up hand-written content.
- **Metadata:** You can search by the text that has been filled in for the document detail fields to locate a document.
- **Notes:** This field can be found at the bottom-left of the screen when you have an individual document open. The “Notes” field does not have a character limit and all text inputted can be searched on.
- **Folder Notes:** When adding folders, there is an option to include folder notes. Using this This filter displays only documents in the folder(s) that have the notes you are filtering by.

GLOBAL DRAG-AND-DROP:

Using the **File Multiple** page, users can continuously change the required fields, then drag in new documents as those fields get changed.



The screenshot displays a web interface for adding documents. It features several dropdown menus for selecting 'Cabinet', 'Folder', 'Sub-Divider', 'Doc Type', 'Doc Type Tab', and 'Doc Date'. A 'Search' button is located next to the 'Folder' dropdown. Below these fields is a large dashed box labeled 'Drag & Drop Files Here'. At the bottom right, there is an 'Upload' section with a 'Choose file' button, a 'Browse' button, and an 'Add' button.

1. From your menu, click **Filing**, then click **Multiple**.
2. Select the **Cabinet** you want to add the document(s) to.
3. Select the **Folder** you want to add the document(s) to.
4. Select the **Sub-Divider** you want to add the document(s) to.
5. Select the **Doc Type** and **Doc Type Tab** you would like to file the document(s) as.
6. Select a **Doc Date** for the document(s) unless you want the Doc Date to be the same as the entry date.
7. Drag-and-drop the document(s) in the box.
8. If you are finished, click the **Import** button to save the documents in PinPoint. If you wish to add more documents before importing, repeat steps 2-7 for the next document(s) before clicking **Import**. The system will know where each set of documents gets filed based on what was selected for each field when they were dragged in the box.