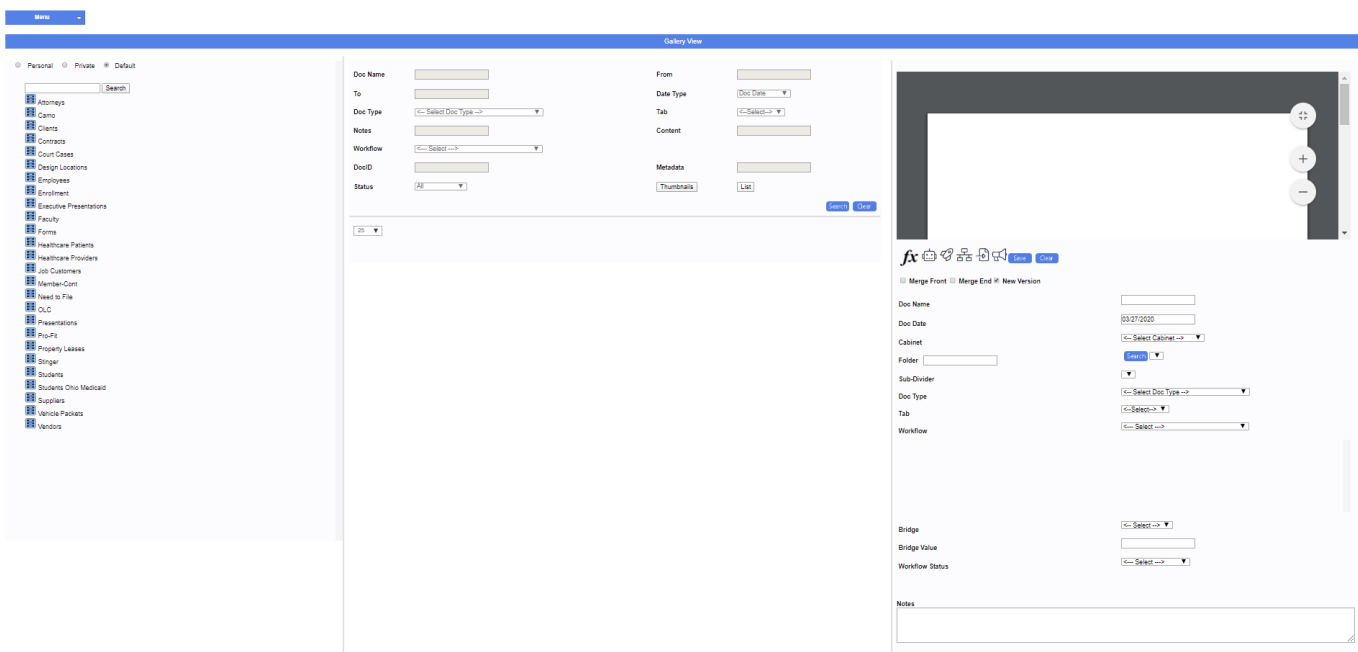# Slim User Walkthrough

INTRODUCTION

This user guide walks you through logging in to PinPoint as a Slim User. A Slim User will only be able to access the following pages in PinPoint:
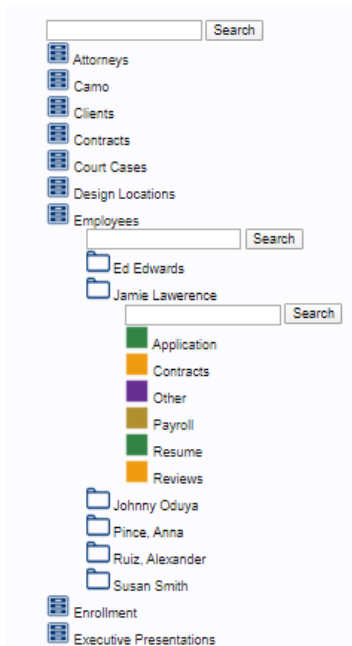
1. File Review
2. Gallery View
3. Content Search
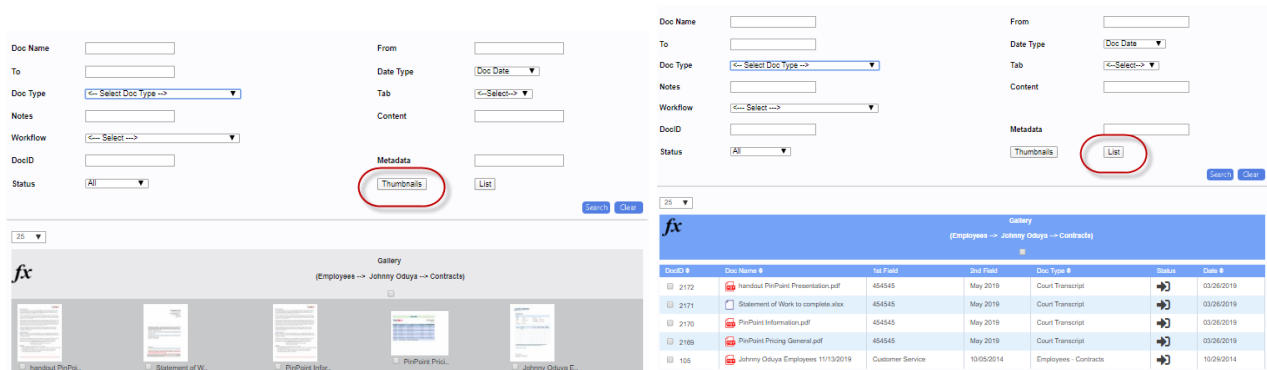4. My Workflows

SEARCHING DOCUMENTS IN GALLERY VIEW

When you first log in to PinPoint as a Slim User, the first page you will come to is the Gallery View where you will see all cabinets you have access to on the left-side of the page:

1. Begin by clicking the icon next to the cabinet you want to open, then click the icon next to the folder you want to open. To view documents within a specific sub-divider, click the colored icon you want to open:
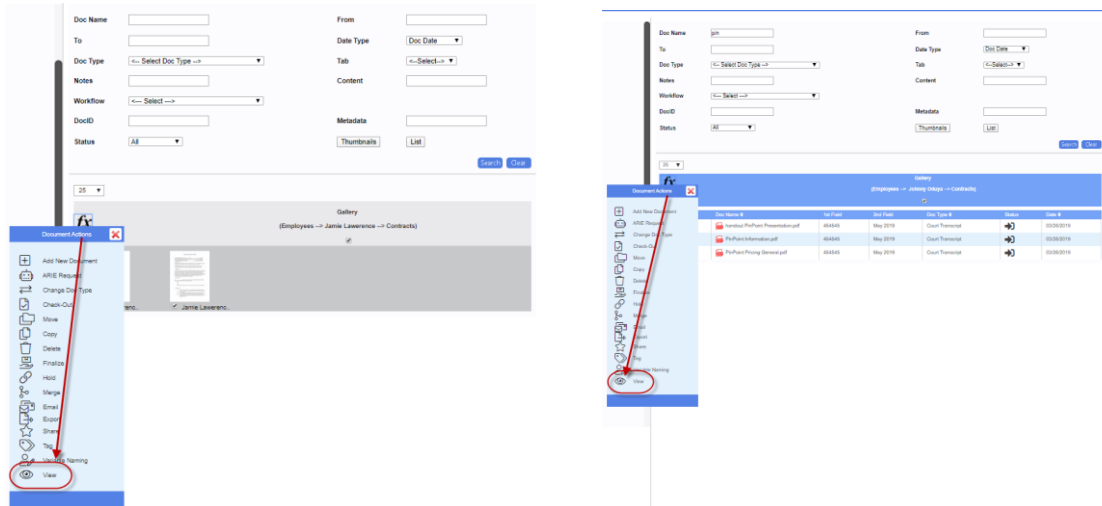

2. Once you have selected the sub-divider to open, the middle of the page will display all documents within the sub-divider. You can use any combination of the search fields to locate documents, and it is up to you whether you want to see documents listed in a Thumbnail view or a List view:
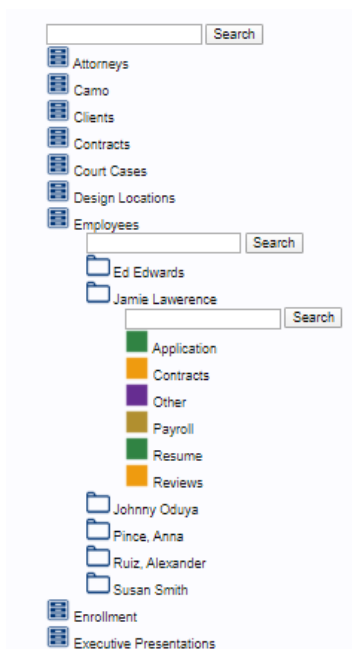

- **Thumbnail View** - To view a document, click the document image to have the document display on the right-side of the page. or click the document name to have the document open in a separate tab in the File Review page.
- **List View** - To view a document, click the document name to have the document display on the right-side of the page. or click the DocID to have the document open in a separate tab in the File Review page.

3. To view multiple documents at once, select the documents, then use the Fx button and click the icon next to View:
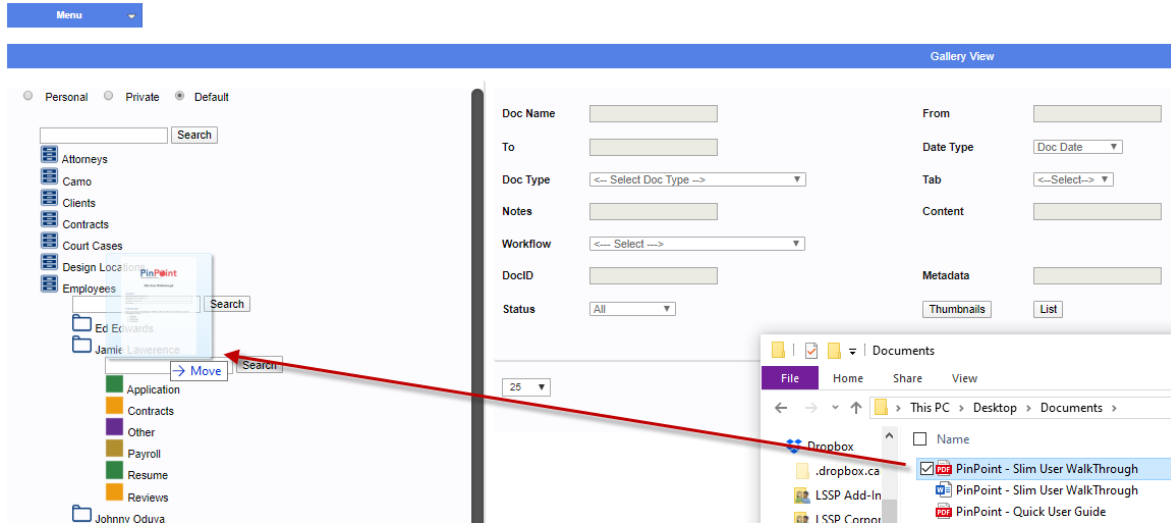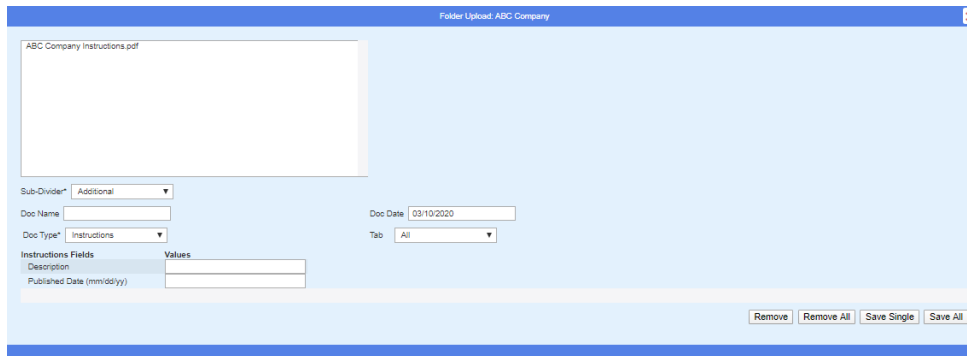

DRAGGING DOCUMENTS IN GALLERY VIEW

1. Begin by clicking the icon next to the cabinet you want to open, then click the icon next to the folder you want to open. To view documents within a specific sub-divider, click the colored icon you want to open:

2. You can either drag documents directly over the folder you want to add to, or directly over the sub-divider:
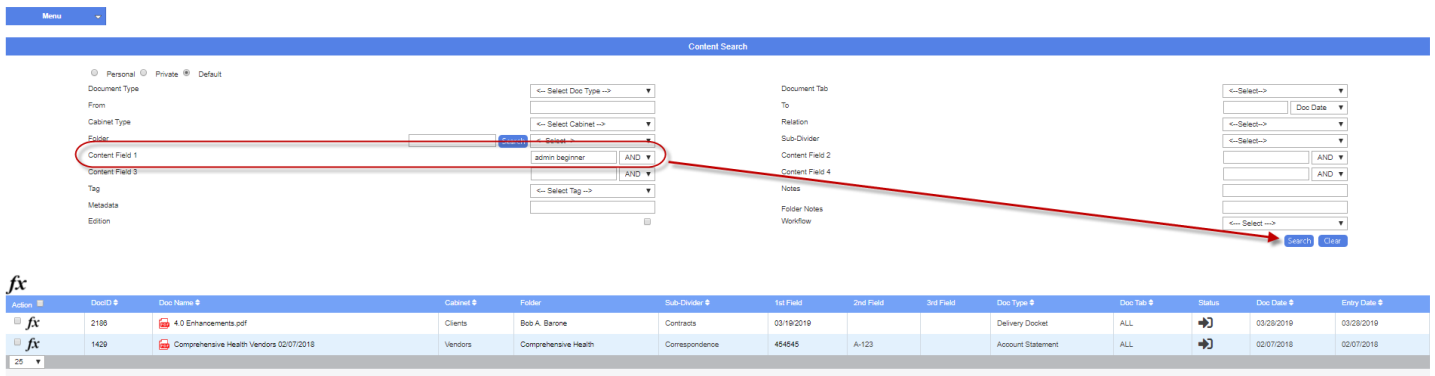

3. After you drag the documents to a folder or sub-divider, a pop-up window will appear where you will fill out the document information:

- If you dragged to a folder, you will be required to select the **Sub-Divider** for the documents.
- Enter a **Doc Name** if you wish to rename the document**s** on the way in.
- Select a **Doc Date** for the documents unless you want the Doc Date to be the same as the entry date.
- Select the **Doc Type/Tab** you want to file the selected 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 one time.

SEARCHING DOCUMENTS IN CONTENT SEARCH
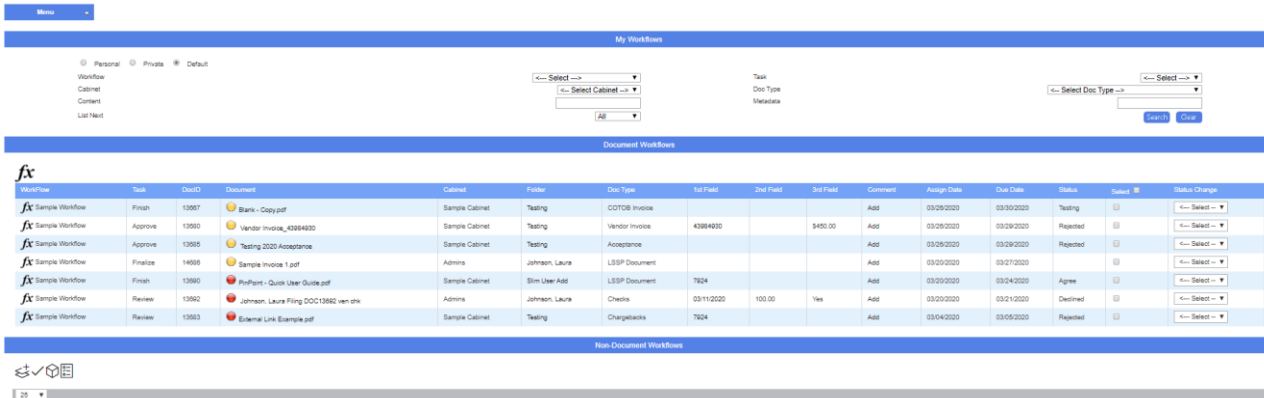
Menu > Content Search

The Content Search is a global search, where users can locate documents, they have access to across the entire database. This is your "catch-all" search for when you may not know where something is, as you can do a full database content search, as shown in the example below.

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

- **Document Type/Tab:** Each document that is added to PinPoint must be labeled by a document type (document tab is optional), so this will always be a useful way to sort/filter.
- **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.
- **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.
- **Content Fields 1-4:** If you type content in these fields 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 <u>not</u> 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.
- **Folder Notes:** When adding folders, there is an option to include folder notes. This filter displays only documents in the folder(s) that have the notes you are filtering by.
- **Edition (checkbox):** This allows the user to display only files that are editions.
- **Workflow:** This allows the user to display only documents that are part of an active workflow.
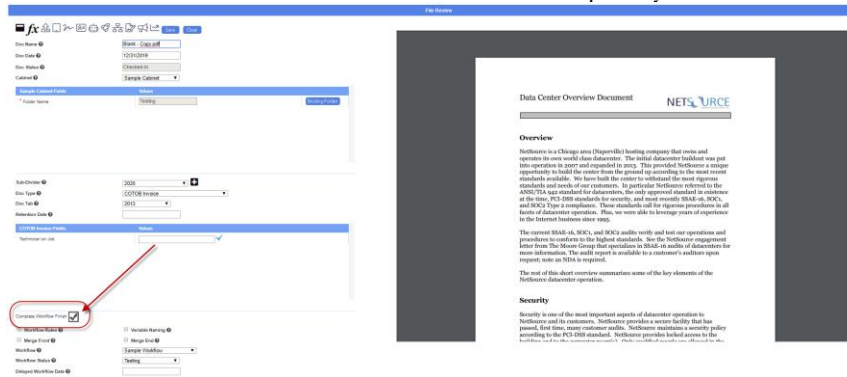
MY WORKFLOWS

Menu > My Workflows

If you have been assigned a workflow task, you can manage your tasks by going to the My Workflow page in the Menu. Users can search by a specific workflow and/or when their task is due to find a certain document or a group of documents. Users can also search by doc type, content and metadata to locate specific documents in their workflows.

Complete a Workflow Task

1. If you do not need to view the document before you complete your task, you can click the yellow or red icon next to the document name to complete your task:

2. If you need to view the document before you complete your task, click the document name to have it opened in a new tab. You will then see a checkmark to complete your task on the left side of the screen:

Complete Multiple Workflow Tasks

1. Select the task(s) you would like to complete, then click the **Fx** button located above all the rest:

2. From the Fx menu, click the icon to the left of **Complete Workflow**, then click **Yes** to confirm.

Change the Status for Workflow Tasks

1. Select the tasks you would like to change the status for and select the new status for each task using the **Status Change** dropdown, then click the **Fx** button that is located above all the other Fx buttons:

2. Click the icon to the left of **Status Change**.

Change Active Workflow Tasks

1. Click the **Fx** button in the same column as the task you want to change, then click the icon to the left of **Change Task**:

2. A pop-up will appear where you just need to select the new task, then click **Save**: