Admin User Exercise Guide

The Admin User Exercise Guide is designed to teach you how to set up the structural requirements in PinPoint, before a document can be added.

The first thing to do is add a cabinet.

Think of cabinets in PinPoint just as you do cabinets in a file room at your office. Each cabinet you create will have its own set of folders, and you can have as many cabinets as you need.

Add a Cabinet

1. From the menu on the left-side of the screen, click **Admin > Fileroom > Cabinets**

2. To begin, click the **Add** button, then enter the **Cabinet Name**.

3. Under **Field Name**, enter the field name header, so users know what to fill in when a folder is added to the cabinet. You are required to add one folder title field. Additional folder detail fields can be added by clicking the "+" icon.
   - If **Folder Title** is checked, that means the folder field is your main folder identifier. The Folder Title field must be set as required.
   - If **Visible** is checked, that means the field value that gets entered is visible to users. If that box is unchecked, then only the users you allow can view the value entered for that field.
   - Enter the character limit in the **Size** box. The maximum is 99 characters per field.
   - If **Unique** is checked, that means the field value cannot be used more than once.
   - Under **Field Type**, you decide the field format; whether it should be a Numeric field (numbers only), Text (alpha-numeric), Date Type, Drop-Down or a Checkbox. Some field types require you to set the field format using the **Mask** button.
   - The **Tool Tip** is optional. If you fill in a tool tip for the field, your "hint" will be visible when users hover their mouse over the field when creating a new folder.

4. When you are finished adding folder detail fields, click the **Sub-Dividers** button at the top of the page.

5. You are required to add at least one sub-divider to save your cabinet. Sub-dividers are used to help you organize documents within the folders in the cabinet. To add a sub-divider, click the **Add** button shown above, then enter the name of the sub-divider.

6. When you are finished adding sub-dividers, click **Save and Exit**.

*The next thing to do is add a folder to your cabinet.*

Add a Folder

1. From the menu on the left-side of the screen, click **Locating > Gallery View**

2. Right-mouse click the icon next to the cabinet you want to add a folder to, then click **Add Folder**.

The final thing to do before adding a document is to add a document type.

Every document you add to PinPoint will be labeled by a document type, which is how you identify the document in the system, as well as how PinPoint recognizes if any special document handling settings such as retention or workflow apply.

Add a Doc Type

1. From the menu on the left-side of the screen, click **Admin > Fileroom > Document Types**
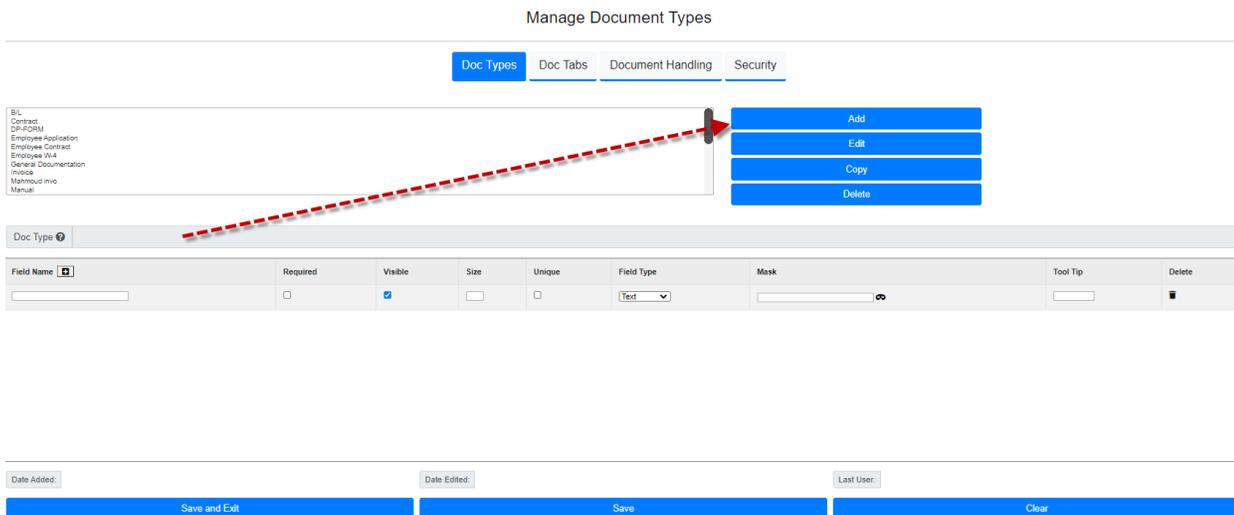
1. To begin, click the **Add** button, then enter the name of your document type.

2. Under **Field Name**, click the "trash" icon under the Delete column on the right side of the page to remove the document metadata field.

3. When you are finished, click **Save and Exit**.

Additional Options for Document Types:

- Each document type can have metadata fields that become a document's details. These fields can be required or optional. You can add additional document metadata fields by clicking the "+" icon. When coming up with document metadata fields, ask yourself these questions: How do I want this document type identified? What type of information do I want associated with documents that get filed as this document type?

- Each document type can have its own set of "tabs" to use as another layer to further organize your documents. To add a tab to a document type, go to the Doc Tabs section at the top center of the page, then click **Add** to add tabs to the document type.

- Each document type can have document handling settings, such as retention, workflow, variable naming, email updates, etc. This is done by going to the Document Handling section at the top center of the page.

Now it's time to add documents!

Add a Document

1. From the menu on the left-side of the screen, click **Locating > Gallery View**

2. On the left side of the screen, begin by clicking the icon next to the cabinet you want to file documents to, then drag the document(s) directly to the folder you want to file to.

3. A pop-up window will appear….
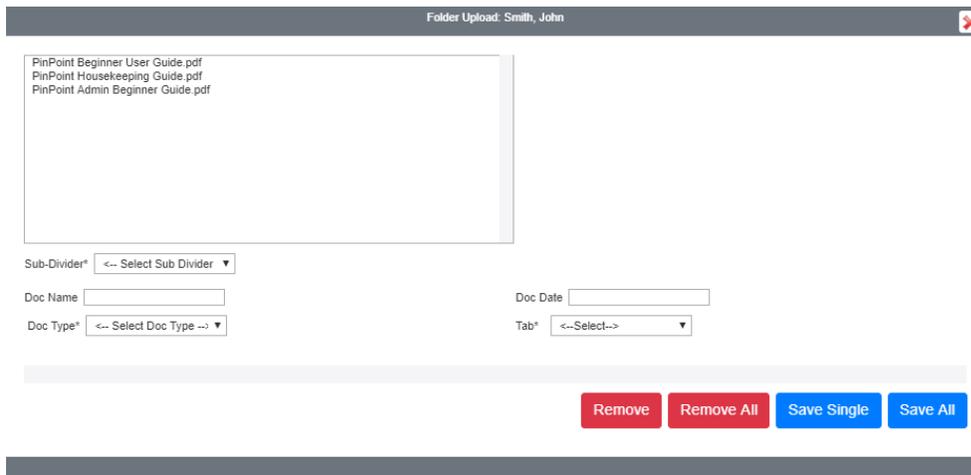
- o **Sub-Divider (required)**: Select the Sub-Divider
- o **Doc Name:** Enter the Doc Name if you do not wish to keep the original name.
- o **Doc Date:** Select the Doc Date.
- o **Doc Type (required):** Select the Doc Type
- o *IMPORTANT:* Clicking **Save Single** will submit ONLY one document selected from the box at a time. Clicking **Save All** will submit ALL documents in the box at once.