

PinPoint Admin Beginner Guide

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This guide will take you through how to get started with your PinPoint fileroom, which involves setting up your Cabinet structures and Document Types.

In the image below, we are showing just one example of a Cabinet structure and some Document Types:

Cabinet -> **Folder** -> **Sub-Divider** -> **Document Type**

- At the top level, we have a cabinet called, **HR Employee Files**.
- Within the HR Employees cabinet, each employee has their own folder like **Adrienne Gorrie's**.
- Within Adrienne's folder, there are sub-dividers like **Hire Documents** and **Forms** that help organize the different document types that are filed.
- Within the Hire Documents sub-divider, there are document types like **Employee Application** and **Policy**.

Every document will be labeled by a Document Type, and all documents reside within the Sub-Divider level.

The screenshot shows the PinPoint Admin interface. On the left is a navigation tree with search boxes for 'Search Cabinet', 'Search Folder', and 'Search Sub-Divider'. The tree structure is: HR Employee Files > Adrienne Gorrie > Hire Documents. Below this are other folders: Applications, Erica Baptiste, Harwell Leishman, John Doe, Kip Bertomieu, Mohsin, and Pam St. Hill.

The main area on the right is a search and filter panel with fields for Doc Name, DocID, From, To, Doc Type, Notes, Workflow, and Metadata. It also includes filters for Date Type (Doc Date), Doc Tab, Content, and Status (All). Search and Clear buttons are present.

Below the filters is a table of documents. The table has columns for DocID, Doc Name, 1st Field, Doc Type, Status, and Date. The table shows 4 documents:

DocID	Doc Name	1st Field	Doc Type	Status	Date
4239	Adrienne Gorrie Policy DOC4239		Policy	➔	01/04/2021
4230	Adrienne Gorrie Employee Contract		Employee Contract	➔	01/04/2021
2108	Adrienne Gorrie Employee Application DOC2108	April 15, 2020	Employee Application	➔	04/15/2020
32	Employee Handbook	April 2019	Employee Contract	➔	04/13/2019

At the bottom right of the table area, there is a 'Select All' checkbox and a page size dropdown set to 25.

ADD A CABINET

The first thing you will need to do is add a **Cabinet**.

Think of cabinets in PinPoint just as you do cabinets within a file room at your office. Cabinets help you separate your files at the highest level into subject matter. Each cabinet you create will have its own set of folders and sub-dividers to help you organize documents efficiently.

1. From the menu on the left-side of the screen, click **Admin**, then click **Cabinets** under the first column: Fileroom Management.

Cabinet Name Search Cabinets Search Clear Add Cabinet

Actions	Cabinet Name	Lockdown	Edit Disabled	CM Auto Folder	Default Sub-Divider	Default Doc Type	Onboard	Updated By
	Clients	No	No	No		Invoice		user 193
	Customers	No	No	No		Invoice		System System
	HR Employee Files	No	No	No			HR Info	System System
	Marketing	No	Yes	No	Branding	Media Release		user 323
	Patient Files	No	No	No				System System
	PinPoint User Guides	No	No	No				System System
	Policies	No	No	No				Angela G.
	Student	No	No	No				user 343
	Student Records	No	No	No				System System
	Vendors	No	No	No				System System

25

2. To begin, click the **Add Cabinet** button.

Cabinet

* Cabinet Name Default Doc Type <-- Select Doc Type --> Description Notes

Automatic Onboard <-- Select Onboard --> Lockdown Disable Cabinet Edit Automatic CM Folder

Last User: Date Added: Date Edited:

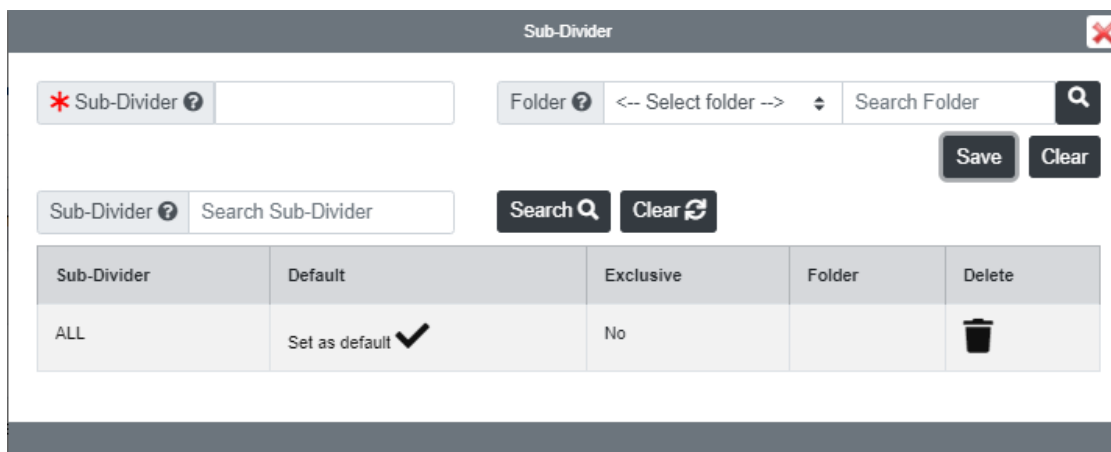
Add Folder Field:

Save Clear

* Field Name	Folder Title	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Delete
<input type="text" value="Employee Name"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="99"/>	<input type="checkbox"/>	Text	<input type="text"/>	<input type="text"/>	
<input type="text" value="Employee ID"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="10"/>	<input checked="" type="checkbox"/>	Numeric	<input type="text"/>	<input type="text"/>	
<input type="text" value="Active Employee"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	CheckBox	<input type="text"/>	<input type="text"/>	

3. Enter the **Cabinet Name**.
4. Using the icon buttons above **Field Name**, select the folder field types you would like to add. You are required to add at least one folder field for the cabinet.

5. Check the boxes **Folder Title** and **Required** for the folder field you want displayed in searches. Only one folder field can be set as the **Folder Title** field for each cabinet.
6. If needed...
 - a) You can change the character limit for each folder field using the **Size** box. The maximum characters you can set per field is 99.
 - b) You can make a folder field unique by checking the **Unique** box.
 - c) You can adjust the folder field format using the **Mask** button.
 - d) You can enter a **Tool Tip** for any folder field, which will be visible when users place their mouse over the folder field when creating a new folder in the cabinet.
7. When you are finished adding folder fields, click the **Save** button.
8. After saving your new cabinet, click the **Sub-Divider** icon next to the cabinet. This is the second icon under the Actions column.





9. Here, you must add at least one sub-divider. Sub-dividers are used to “divide” different document types within the folders in the cabinet. If you are going to use only one sub-divider like in the example above, set that sub-divider as the **Default**. You can also come back here after you add folders to the cabinet and assign exclusive sub-dividers to those folders.
10. When you are finished adding sub-dividers, you can close the window.

ADD A FOLDER


















The next thing you will do is add a **Folder** to your cabinet.

1. Under the menu on the left-side of the screen, click the **Folders** button.

Personal Private Default

Cabinet Student Records   From To

Description Notes

<input type="checkbox"/> Action	Student Name <input type="text"/>
	
<input type="checkbox"/>    	Bethany Planter
<input type="checkbox"/>    	Greg Johnson
<input type="checkbox"/>    	Jamie Jones
<input type="checkbox"/>    	Kevin Conrad

2. Select the **Cabinet** you want to add a folder to.
3. Click the **+** button to the right of the Cabinet field.
4. Enter the required **Folder Field Values**.
5. Click the **Save** button.

ADD A DOC TYPE

The final thing you need to do before adding your first file is add a **Doc Type**.

Every file you add to PinPoint will be labeled by a Doc Type, which is how you identify the document in the system. Additionally, each Doc Type can be assigned specific settings such as retention, variable naming, and workflow.

1. Under the menu on the left-side of the screen, click the **Doc Types** button.

Actions	Doc Type	OCR	Do Not Version	Retention	Variable Name	Workflow	Template	Default Doc Tab	Updated By
	Chargeback	OCR All Pages	No		Global				System System
	Contract	OCR All Pages	No		Global			All	System System
	Employee Application	OCR All Pages	No		Policies	Workflow review		All	System System
	Employee Contract	No OCR	No		Global			All	System System
	Employee Emergency Contact Form	OCR All Pages	No		Global				System System
	Employee Time Card	OCR All Pages	No		Global				System System
	Employee W-4	No OCR	No					2019	System System
	Financial Aid Document	OCR All Pages	No		Global				System System
	I-9	OCR All Pages	No		Global				System System
	Invoice	OCR All Pages	No		Global			Paid	System System

2. To begin, click the **Add Doc Type** button.

Doc Type
✕

* Doc Type

Retention

OCR Handling

Last User:

Add Doc Type Field:

Workflow

Bridge

Retention Disabled

Date Added:

Variable Name

Recurring Workflow

Do Not Version

Date Edited:

Template

Number Of Days

Hold

Save Clear

* Field Name	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Delete
<input type="text" value="Invoice Number"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="99"/>	<input checked="" type="checkbox"/>	<input type="text" value="Text"/>	<input type="text" value=""/>	<input type="text" value=""/>	
<input type="text" value="Amount"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="99"/>	<input type="checkbox"/>	<input type="text" value="Text"/>	<input type="text" value=""/>	<input type="text" value=""/>	
<input type="text" value="Paid"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value="CheckBox"/>	<input type="text" value=""/>	<input type="text" value=""/>	

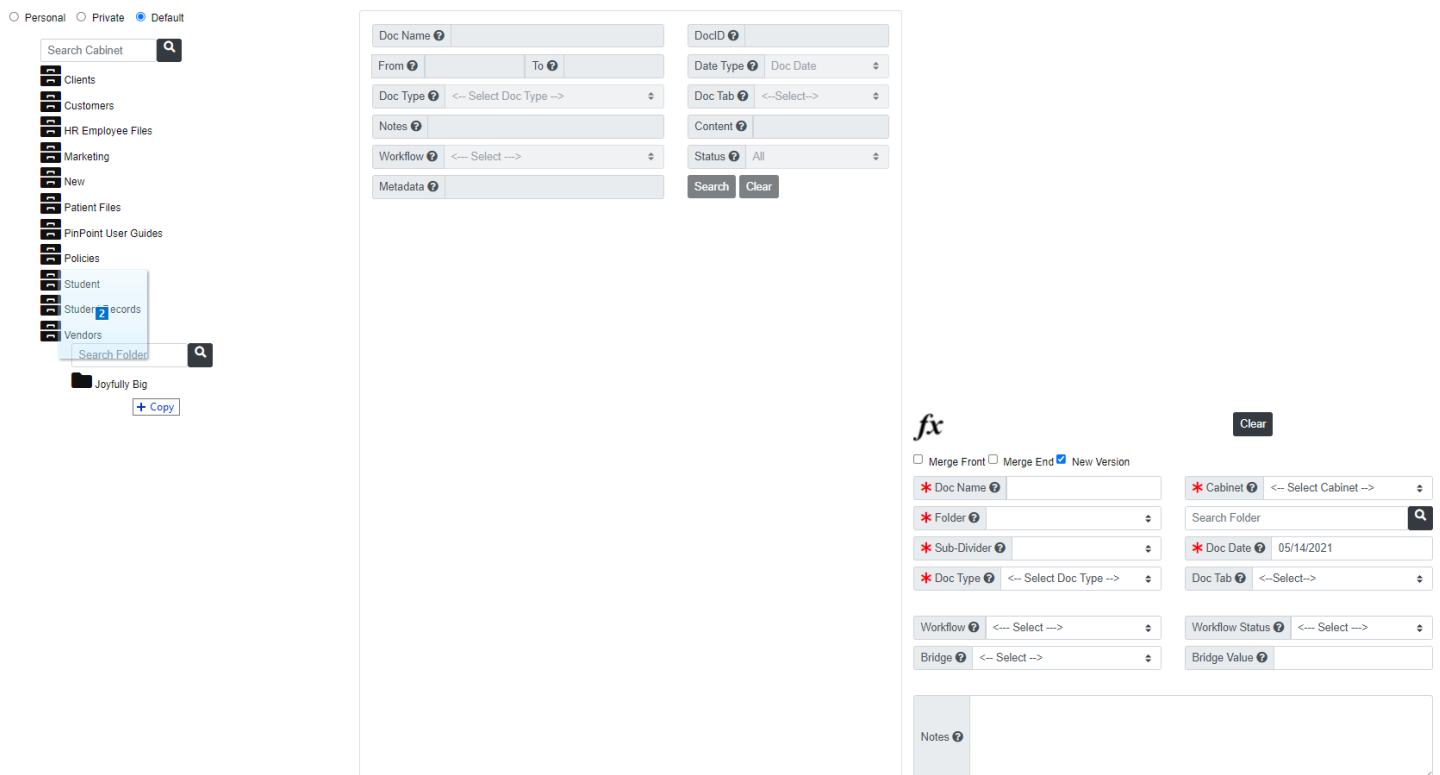
3. Enter the **Doc Type Name**.

4. Using the icon buttons above **Field Name**, you can add document metadata fields, but you are not required to. When coming up with document metadata fields, ask yourself these questions: How do I want this Doc Type identified? What type of information do I want associated with files that get saved as this Doc Type?

5. If needed...
 - a) You can make any document metadata field **Required**, which means users must fill in the metadata field at the time a new file is added as the Doc Type.
 - b) You can change the character limit for each metadata field using the **Size** box. The maximum characters you can set per field is 99.
 - c) You can make a metadata field unique by checking the **Unique** box.
 - d) You can adjust the metadata field format using the **Mask** button.
 - e) You can enter a **Tool Tip** for any metadata field, which will be visible when users place their mouse over the metadata field when adding a new file as the Doc Type.

ADD A FILE

1. At the top of menu on the left-side of the page, click **Back to User Mode**. Then, click the **Gallery** button below the menu.
2. On the left side of the Gallery View, begin by clicking the icon next to the cabinet you want to open, then drag-and-drop the files directly over the folder you want to file them to.



3. A pop-up window will appear....

Folder1✖

Sample Invoice 1.pdf
Sample Invoice 2.pdf

Sub-Divider <-- Select Sub Divider --> ▾		
Doc Name <input type="text"/>	Doc Date <input type="text"/>	
Doc Type <-- Select Doc Type --> ▾	Doc Tab <input type="text"/>	▾

Remove Remove All Save Single Save All

- **Sub-Divider (required):** Select the Sub-Divider you want to store the files in within that folder.
- **Doc Name:** Enter the Doc Name if you do not wish to keep the original file name.
- **Doc Date:** Select the Doc Date.
- **Doc Type (required):** Select the Doc Type you want the files filed as.
- **IMPORTANT:** Clicking **Save Single** will submit ONLY one document you select from the box at a time. Clicking **Save All** will submit ALL documents in the box at once.