# PinPoint Admin Beginner Guide

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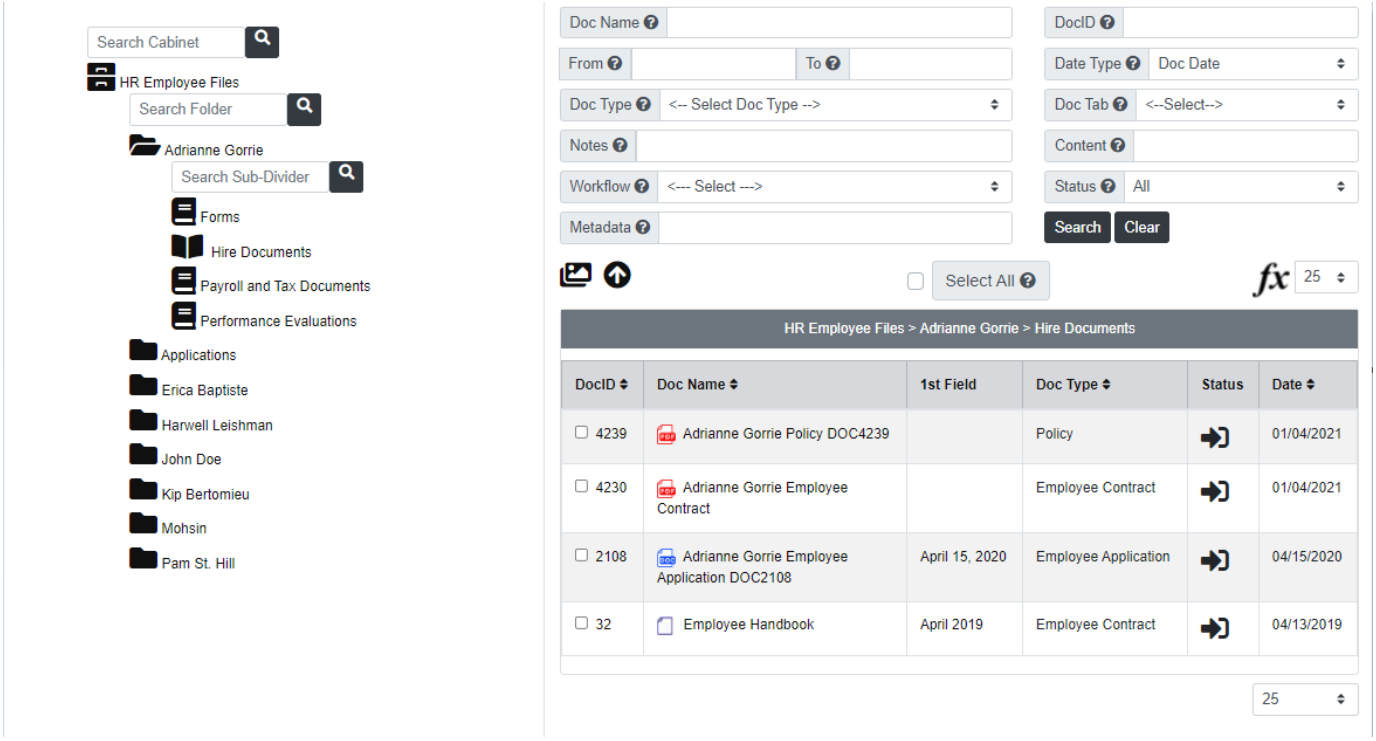
This guide will take you through how to get started with your PinPoint fileroom, which involves setting up your Cabinet structures and Document Types.

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 **Adrianne Gorrie's**.
- Within Adrianne'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.**

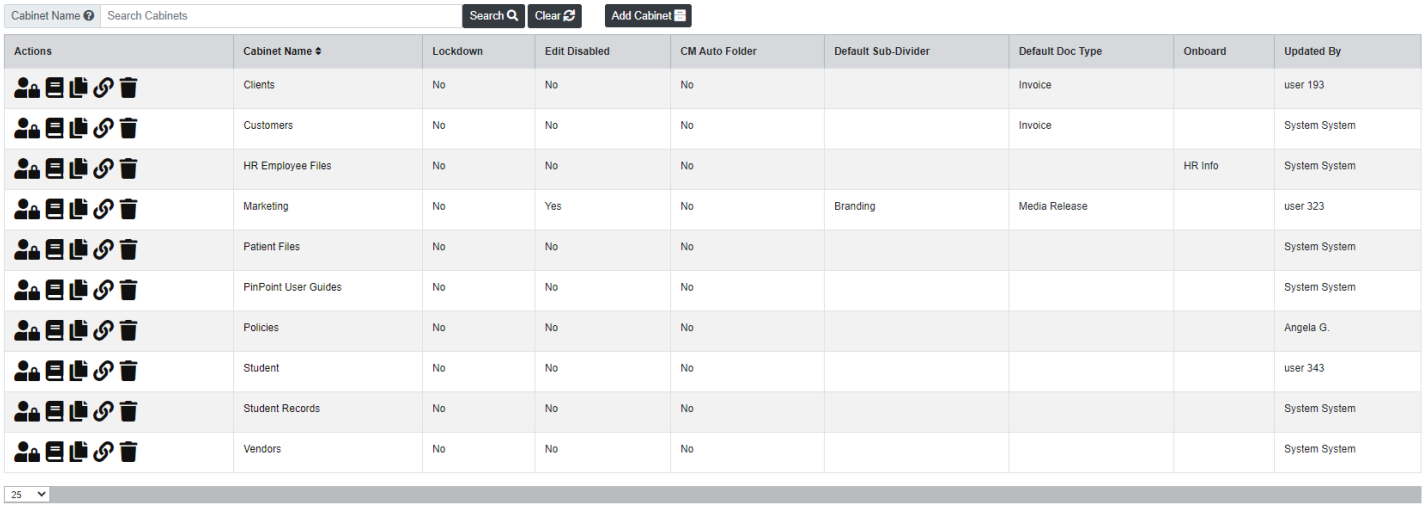


# ADD A CABINET

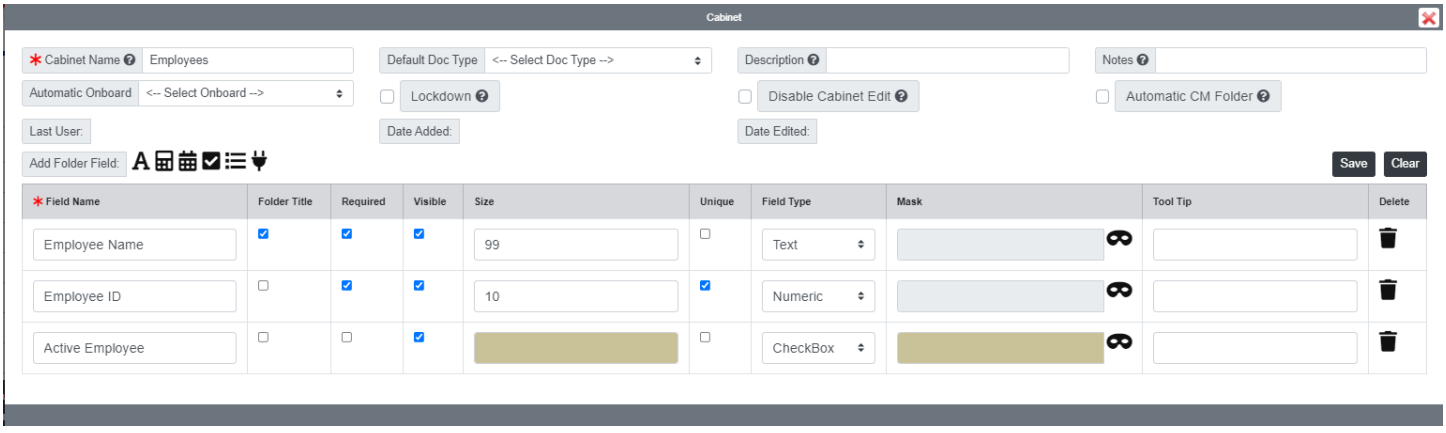
The first thing you will need to do is add a **Cabinet**.

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.




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




3. Enter the **Cabinet Name**.

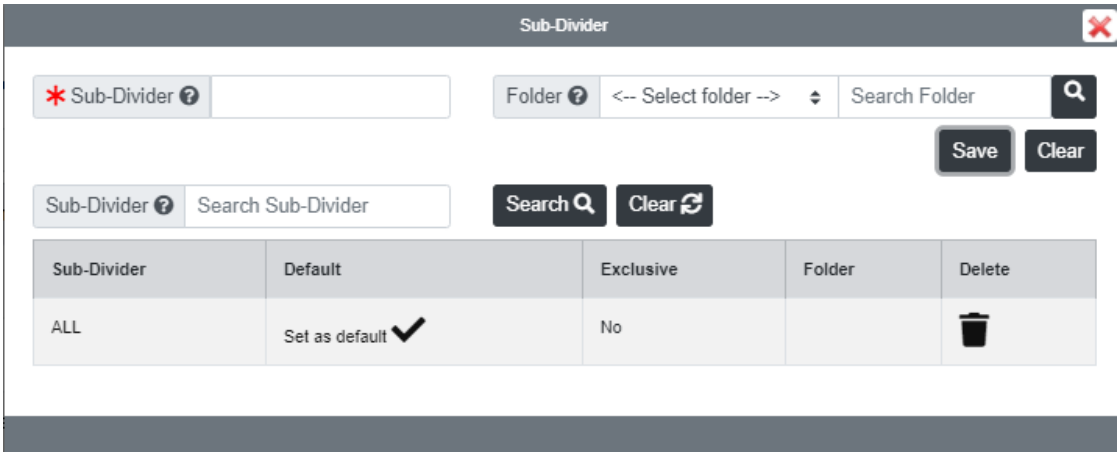
4. Using the icon buttons above **Field Name**, select the folder field types you would like to add. You are required to add at least one folder field for the cabinet.

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.



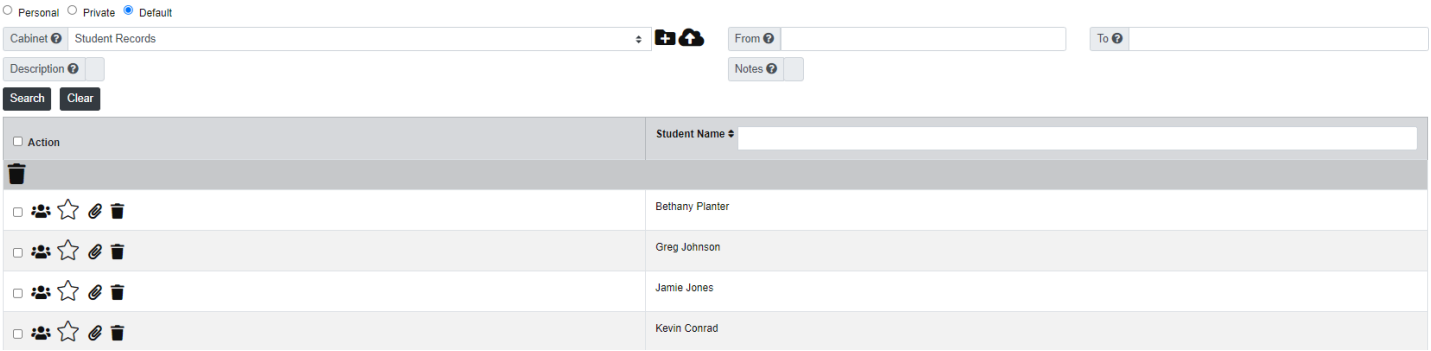

9. Here, you must add at least one sub-divider. Sub-dividers are used to “divide” different document types within the folders in the cabinet. If you are going to use only one sub-divider like in the example above, set that sub-divider as the **Default**. You can also come back here after you add folders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



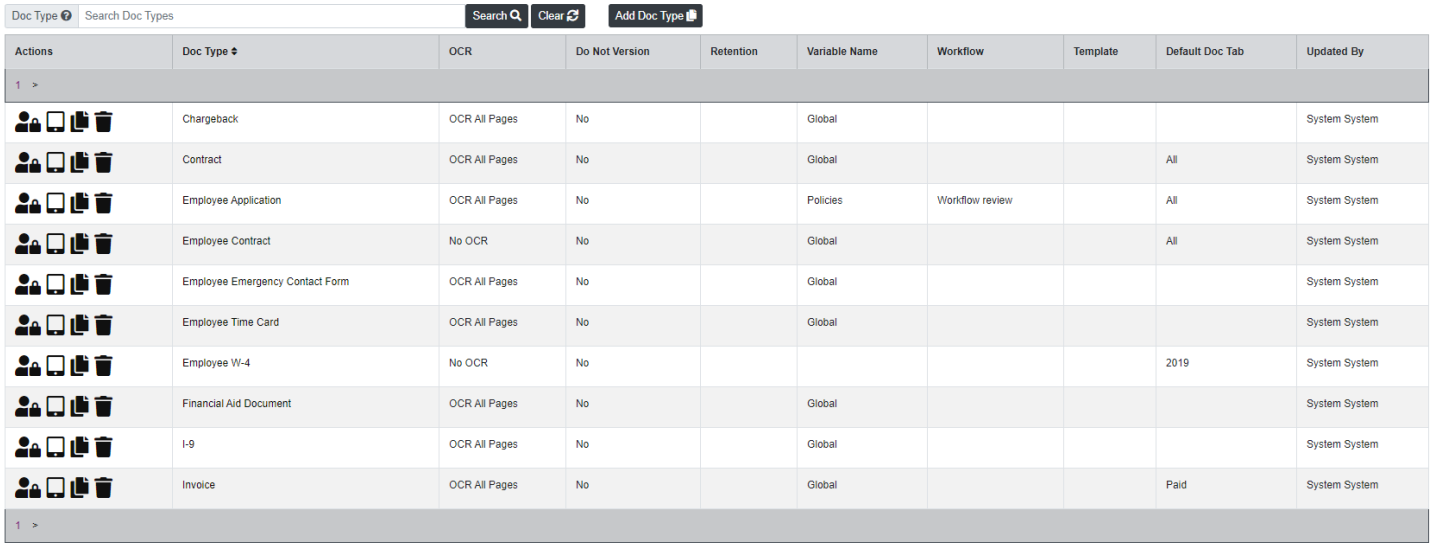

2. Select the **Cabinet** you want to add a folder to.
3. Click the **+** button to the right of the Cabinet field.
4. Enter the required **Folder Field Values**.
5. Click the **Save** button.

# ADD A DOC TYPE

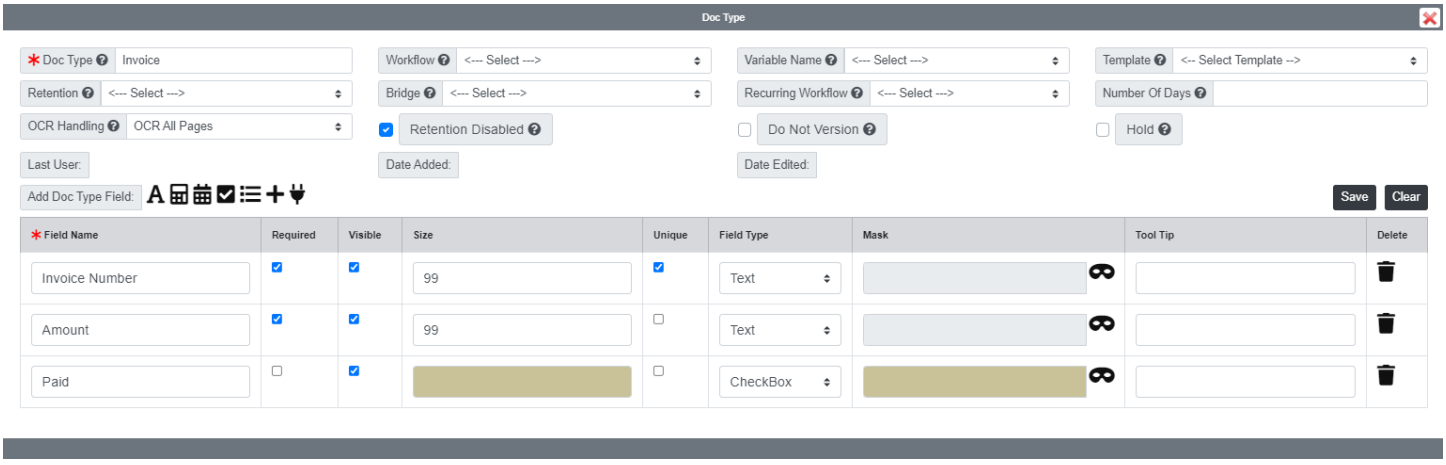
The final thing you need to do before adding your first file is add a **Doc Type**.

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.




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




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

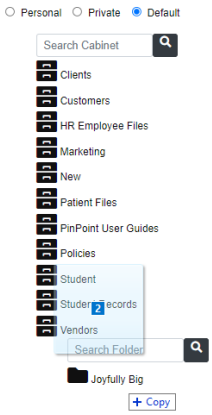
4. Using the icon buttons above **Field Name**, you can add document metadata fields, but you are not required to. When coming up with document metadata fields, ask yourself these questions: How do I want this Doc Type identified? What type of information do I want associated with files that get saved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

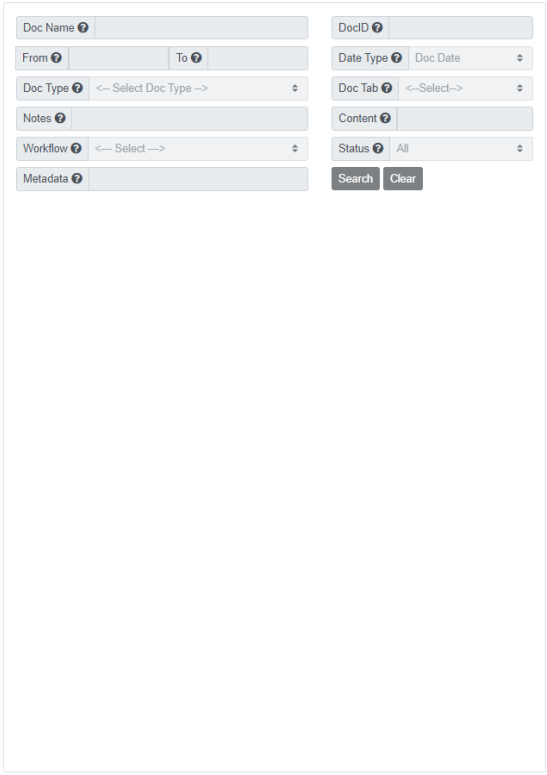
5. If needed…
    a) You can make any document metadata field **Required**, which means users must fill in the metadata field at the time a new file is added as the Doc Type.
    b) You can change the character limit for each metadata field using the **Size** box. The maximum characters you can set per 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.

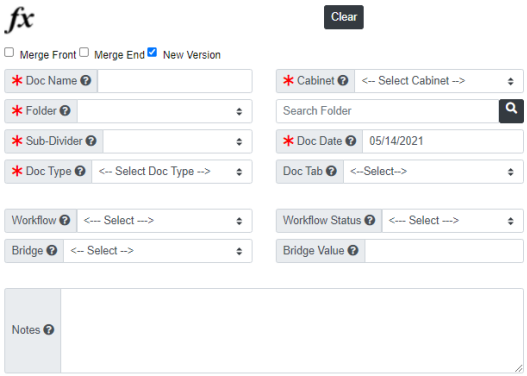
## ADD A FILE

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.

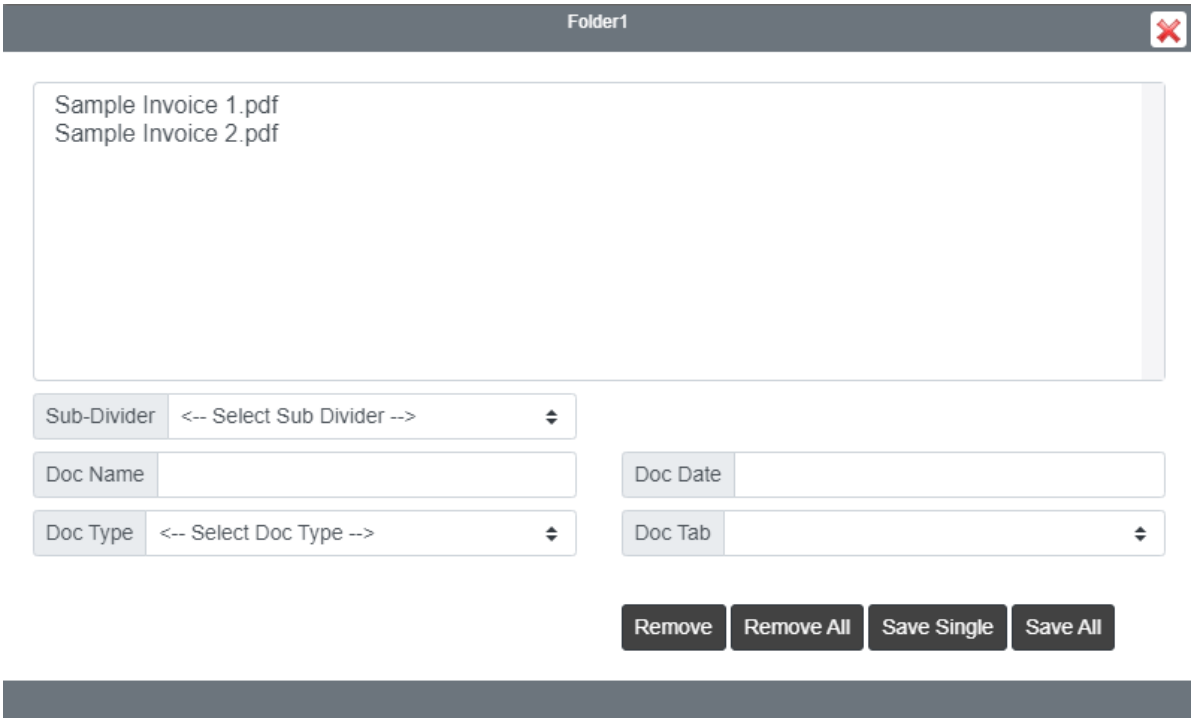
2. On the left side of the Gallery View, begin by clicking the icon next to the cabinet you want to open, then drag-and-drop the files directly over the folder you want to file them to.




3. A pop-up window will appear….




- **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.