

User Reference Guide

PinPoint Document Management System



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INTRODUCTION

This user guide is meant as a starting point for users of the system. PinPoint has an extensive list of features that have not been covered in this user guide, but will be covered through online training classes, online training videos, and our training blog. As always, our staff is available to help with any questions or concerns that may arise.

The user section is for the day-to-day usage of the PinPoint system. Based on the user, their security will determine what they can do and see.

For the filing of a document, you can either scan directly, scan from outside the system with our automatic filer ARIE, or scan directly into the system with the proper drivers. You can also import one file, as well as import multiple files at one time (Drag-and-Drop).

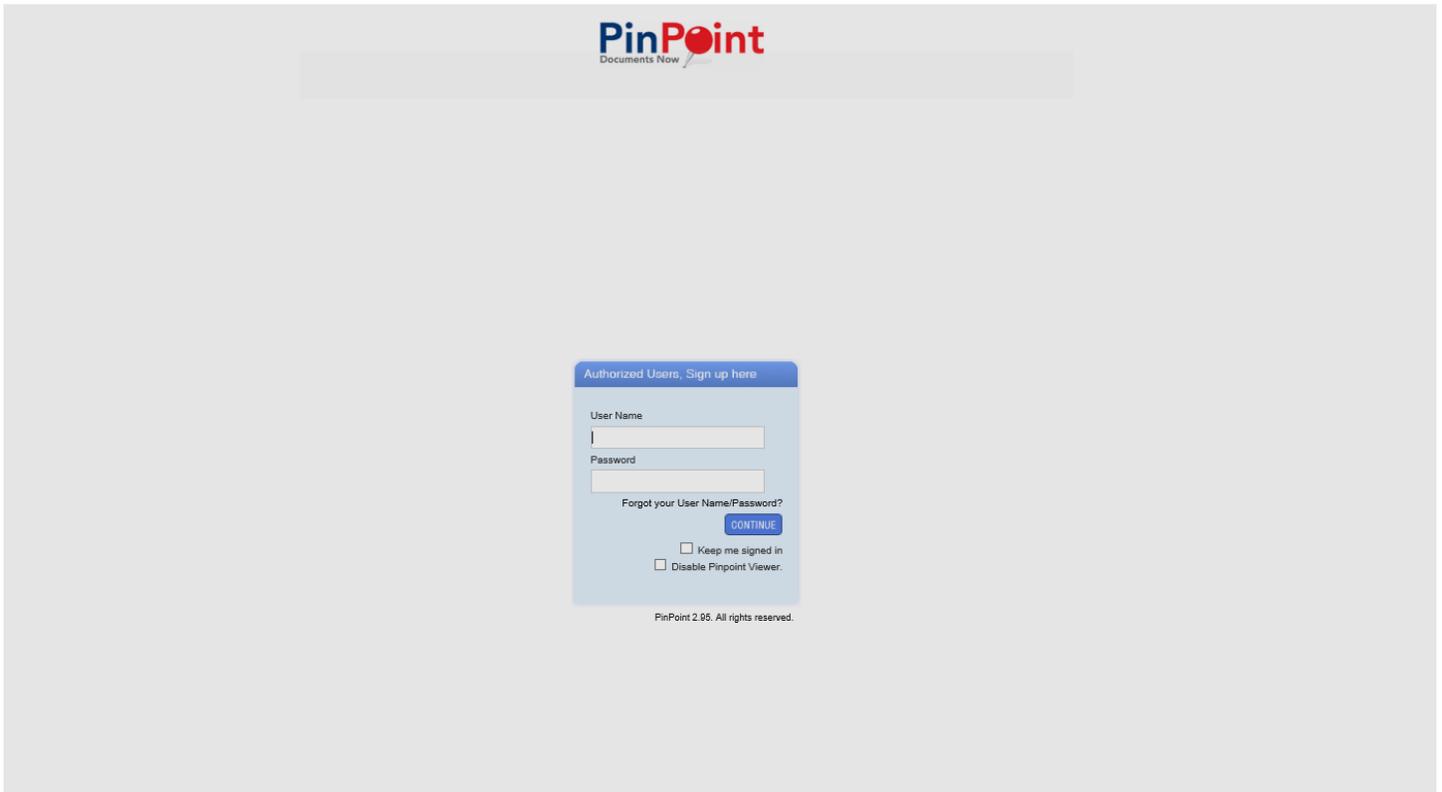
You can also use editable PDF forms and have a forms library allowing users to fill in forms and to monitor those forms. These could even be used in workflow or for any process that you have.

Users are in groups and have different rights to both folders and document types. The administrator will define the access your users have.

Users that are defined as super users will have access to all subject types and document types, with the security of the group that they've logged in as. So, if a group had read only or view only, than if a super user logs in under that group, they will be able to look at all documents in the system only.

LOGGING IN

Upon logging into the system, the user will be prompted for the group and file room that they are entering, unless they're only in one file room in one group, and thus are taken directly into the system after they enter their username and password. If a user forgets their password, they can click on forgot username or password to get it resent.



The screenshot displays the PinPoint login page. At the top center is the PinPoint logo with the tagline 'Documents Now'. Below the logo is a light gray rectangular area. In the center of the page is a blue-bordered login form titled 'Authorized Users, Sign up here'. The form contains two input fields: 'User Name' and 'Password'. Below the password field is a link that says 'Forgot your User Name/Password?'. A blue 'CONTINUE' button is positioned to the right of this link. At the bottom of the form are two checkboxes: 'Keep me signed in' and 'Disable Pinpoint Viewer'. Below the form, the text 'PinPoint 2.05. All rights reserved.' is visible.

THE DASHBOARD

The dashboard is a screen that shows you several different panels.

The top panel (**Recent Files**) shows the most recent documents to be touched by you.

Below that, to the left (**In Progress**) shows documents you currently have checked out from PinPoint. To the right (**Workflow**) shows any workflow tasks waiting for you to complete.

Below that, on the left and right (**Messages and Notes**) are messages that another user has broadcasted out to all or specific users, or a “tickler” you’ve set as reminders for yourself.

The screenshot shows the PinPoint 2.96 dashboard for 'Doctors Hospital of Renaissance'. The dashboard is titled 'Dashboard' and includes navigation tabs for 'Filing', 'Locating', 'Workflows', and 'Admin'. The main content area is divided into four panels:

- Recent Files:** A table listing recent documents with columns for date, filename, type, location, and ID.

Date	Filename	Type	Location	ID
10/20/2014	Office Agreement	Lease	Commercial Property	Naperville Business Complex
10/20/2014	1200 York Road - Lease Agreement	Lease	Properties	34509
10/20/2014	office.jpg	Property Floor Plan	Commercial Property	Naperville Business Complex
10/19/2014	PropertyManagementAgreementWM-790x1024.jpg	Property Management Agreement	Properties	33309
10/19/2014	PropertyManagementAgreementWM-790x1024.jpg	Property Management Agreement	Properties	34509
- In Progress:** A table listing documents currently checked out, with columns for date, document name, type, location, and user.

Date	Document Name	Type	Location	User	
11/15/2012	Vendor Invoices	Test Document	Vendors	Statements	Acme Inc.
11/29/2012	Vendor Invoices	Current eDrawer customer Request to Convert to PinPoint.pdf	Vendors	Statements	Acme Inc.
10/22/2012	Vendor Invoices	mens	Vendors	Other	Williams Paint
09/17/2012	Vendor Invoices	Current eDrawer customer Request to Convert to PinPoint.pdf	Vendors	Statements	Williams Paint
08/13/2012	Vendor Invoices	search and workflow_1.pdf	Vendors	Statements	Acme Inc.
- Work Flow:** A table listing workflow tasks with columns for task name, description, document name, start date, and end date.

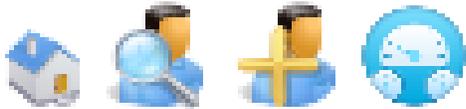
Task Name	Description	Document Name	Start Date	End Date
Vendor Invoice Processing	Mailroom receives invoice and starts the workflow	Distribution Manager.pdf	10/17/2014	10/20/2014
BarbitNV	Receive the invoice	How to add a Cabinet in PinPoint.pdf	10/17/2014	10/19/2014
Project Lists	review	Out of Office Re Reminder to save this week only.txt	10/17/2014	10/18/2014
Project Lists	review	Order Confirmation Notice.txt	10/17/2014	10/19/2014
Project Lists	review	LSSP BILLING.pdf	10/17/2014	10/18/2014
New Case	Review and approve	Clinic bill	10/15/2014	10/16/2014
New Case	Review and approve	Case Document	10/13/2014	10/14/2014
A thru E	see the document	07252015062324.pdf	10/13/2014	10/14/2014
Vendor Invoice Processing	Interface to all systems	Example Doc	08/14/2014	08/15/2014
Invoice Arrived	Verify invoice and assign	Jane_eDrawer or PinPoint Renewal Invoice.txt	08/14/2014	08/15/2014
- Messages and Notes:** Two empty panels at the bottom of the dashboard.

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In the top right corner, there are four icons. Each user can set “favorite” screens through Edit Profile; these include their favorite Home Page, favorite Search, favorite Filing, and favorite Dashboard (Classic, as shown above, or Express). The icons will bring you to those pre-defined favorite screens, and can be defined from user to user.

SETTING UP YOUR FAVORITE SCREENS

Your profile has the ability to set 4 favorite screens that can be accessed using the four icons in the upper right hand corner of your screen. These favorite screens include: Favorite Home Page, Favorite Search, Favorite Filing, and Favorite Dashboard.



To access your profile, click on your user name in the upper right hand corner, and you'll be taken to a screen that will allow you to personalize your PinPoint experience.

Favorite Screens

* Favorite Screen type * Select Screen

Favorite Home

-> Select Screen ->

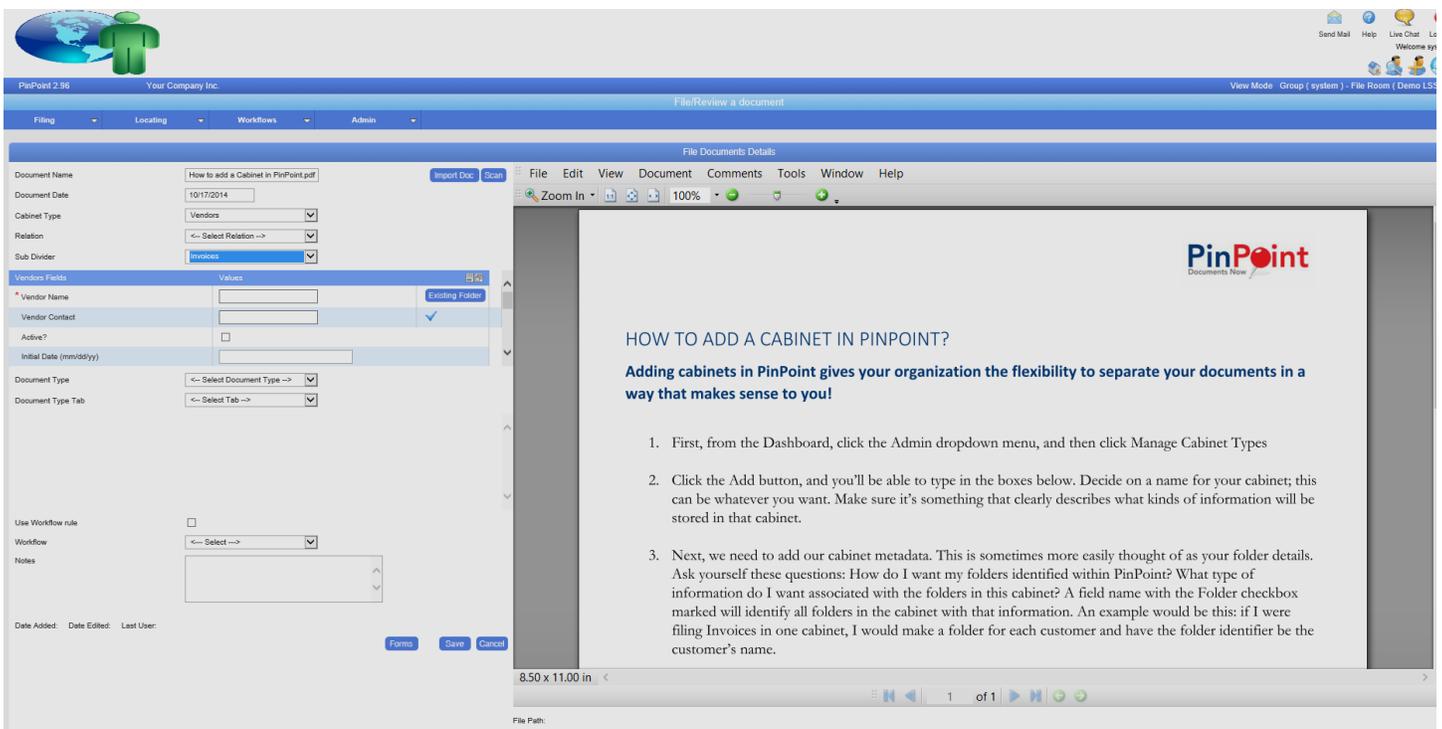
Favorite Screen Type	Selected Screen
Favorite Home	<input type="checkbox"/> Express View
Favorite Search	<input type="checkbox"/> Content Search
Favorite Filing	<input type="checkbox"/> File Single Documents
Favorite Dashboard	<input type="checkbox"/> Regular Dashboard

You can select your Favorite Home (for example, you want to be taken immediately to Express View upon signing into PinPoint), your Favorite Search, your Favorite Filing (single versus multiple), and/or your Favorite Dashboard (Regular versus Express). Using the icons above, you can access your defined screens with one click.

FILING A SINGLE DOCUMENT

Filing a document manually in PinPoint is easy to accomplish. Start by clicking **Filing** → **Single Document**. You'll have the option to Import a Doc from your workstation, or Scan directly (if your scanner has the proper drivers to do this). You'll complete the information about the document, listed on the left side of the screen. This includes the Document Name, Document Date, Cabinet Type, Sub Divider, Document Type, and Document Type Tab. You'll also need to complete the required metadata associated with the Cabinet Type and the Document Type.

You can import or scan the document in at any time, but will need to do so before you can save the information you've entered.



The screenshot displays the PinPoint software interface. On the left, the 'File Documents Details' form is visible, containing fields for Document Name, Document Date, Cabinet Type, Relation, Sub Divider, Vendors Fields, Vendor Name, Vendor Contact, Active?, Initial Date, Document Type, Document Type Tab, Use Workflow rule, Workflow, and Notes. The 'Import Doc.' and 'Scan' buttons are also present. On the right, a document preview is shown with the title 'HOW TO ADD A CABINET IN PINPOINT?' and the following text:

Adding cabinets in PinPoint gives your organization the flexibility to separate your documents in a way that makes sense to you!

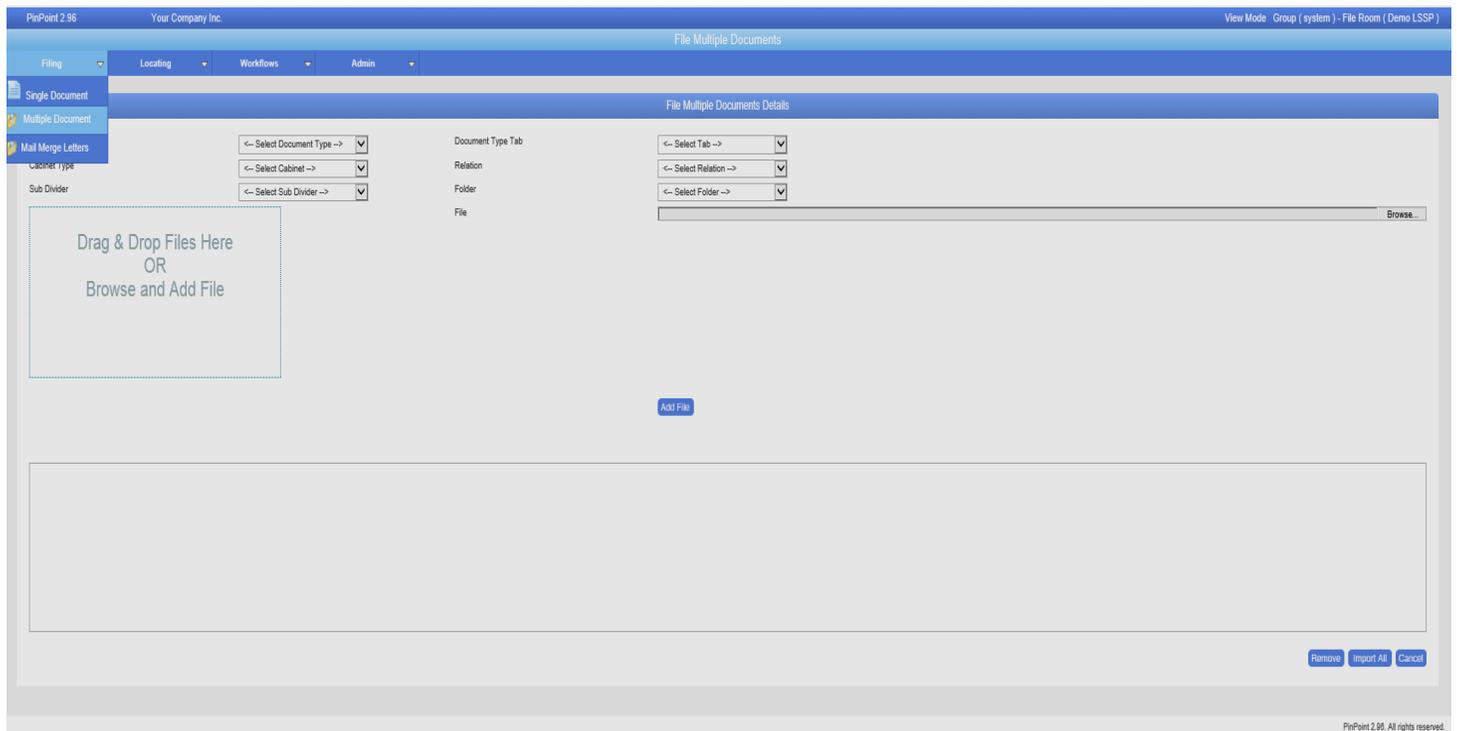
1. First, from the Dashboard, click the Admin dropdown menu, and then click Manage Cabinet Types
2. Click the Add button, and you'll be able to type in the boxes below. Decide on a name for your cabinet; this can be whatever you want. Make sure it's something that clearly describes what kinds of information will be stored in that cabinet.
3. Next, we need to add our cabinet metadata. This is sometimes more easily thought of as your folder details. Ask yourself these questions: How do I want my folders identified within PinPoint? What type of information do I want associated with the folders in this cabinet? A field name with the Folder checkbox marked will identify all folders in the cabinet with that information. An example would be this: if I were filing Invoices in one cabinet, I would make a folder for each customer and have the folder identifier be the customer's name.

The interface also shows a menu bar (File, Edit, View, Document, Comments, Tools, Window, Help), a toolbar with zoom controls, and a status bar at the bottom indicating '8.50 x 11.00 in' and '1 of 1'.

FILING MULTIPLE DOCUMENTS

Alternatively, you may find that you need to file more than one document at once. **From the Filing menu, select Multiple Documents**, and you'll be given the option to bring in several documents at once. You'll need to decide which **Cabinet** and **Document Type** each document is before **adding the file**. Once all files are added, you can select **Import All**, and all your documents will be filed at once.

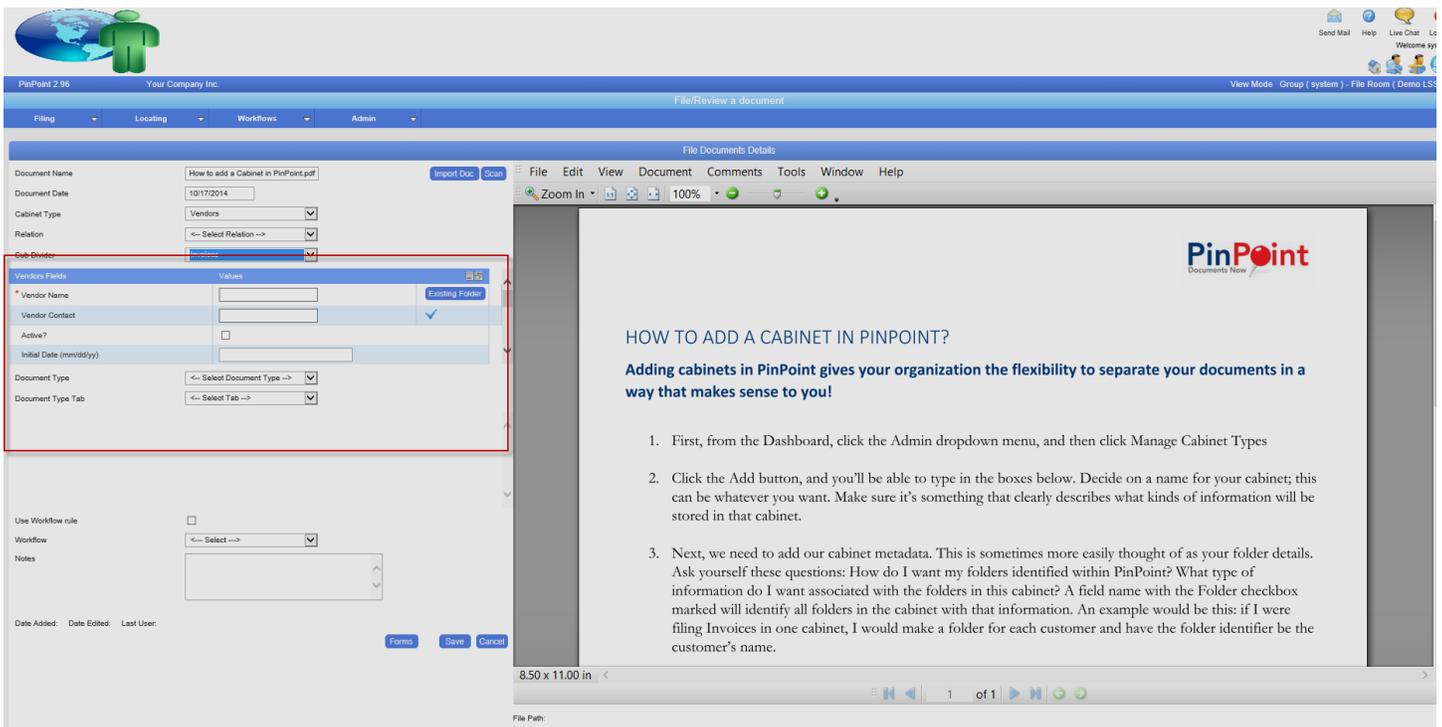
You can also drag and drop files from your workstation into PinPoint, and they will be uploaded automatically. This is helpful if you have quite a few documents that you need to add at one time or documents that need to go to separate folders. Again, click Import All once you've dropped in all your files, and they will be added to PinPoint in the location you specified.



ADDING A NEW FOLDER

Adding new folders can be done in two ways in PinPoint. First, you can add a new folder while filing a document. In the File Document Details screen, once you select the Cabinet that the document will be filed into, you will then be asked to complete the **required metadata** (which creates folders). For example, if you were filing an invoice, you could add a new folder for the company name if this is the first invoice received from that company. Alternatively, if a folder for that company already exists, you would select **Existing Folder**.

Please Note: When you type data in the metadata fields, a new folder will be created, even if a folder already exists. To avoid multiple folders with the same subject, always check Existing Folder to see if one has been created.



The screenshot shows the 'File Documents Details' interface. The 'Vendors Fields' section is highlighted with a red box. It includes the following fields:

- Vendor Name: [Text Input] Existing Folder
- Vendor Contact: [Text Input]
- Active?:
- Initial Date (mm/dd/yyyy): [Text Input]
- Document Type: [Dropdown Menu]
- Document Type Tab: [Dropdown Menu]

The document preview on the right is titled 'HOW TO ADD A CABINET IN PINPOINT?' and contains the following text:

Adding cabinets in PinPoint gives your organization the flexibility to separate your documents in a way that makes sense to you!

1. First, from the Dashboard, click the Admin dropdown menu, and then click Manage Cabinet Types
2. Click the Add button, and you'll be able to type in the boxes below. Decide on a name for your cabinet; this can be whatever you want. Make sure it's something that clearly describes what kinds of information will be stored in that cabinet.
3. Next, we need to add our cabinet metadata. This is sometimes more easily thought of as your folder details. Ask yourself these questions: How do I want my folders identified within PinPoint? What type of information do I want associated with the folders in this cabinet? A field name with the Folder checkbox marked will identify all folders in the cabinet with that information. An example would be this: if I were filing Invoices in one cabinet, I would make a folder for each customer and have the folder identifier be the customer's name.

You can also add a folder without filing a document. From the top, select **Admin** → **Setup** → **Manage Folders**. As in the previous example, we recommend checking to see if a folder has already been created before adding another one.

SEARCHING FOR DOCUMENTS

Searching for documents within PinPoint can be accomplished several different ways. Choosing your search method is often a matter of personal preference, or your ultimate goal.

All search methods can be accessed under the Locating drop down menu in the toolbar at the top of the screen.

The screenshot shows the PinPoint 2.96 interface for 'Doctors Hospital at Renaissance'. The 'Locating' dropdown menu is open, showing options: Explorer View, Express View, Documents Version, Document View, Content Search, and Metadata SOS Search. A red arrow points to 'Explorer View'. Below the menu, there are search filters for Location, Sq Footage, and Owner. A table lists locations: American Red Cross, Naperville Business Complex, and 110 Park Place Complex. The 'Documents' section has filters for From, To, OCR Text, Meta Data, and Document Types.

First, we'll discuss Explorer View. This cascading drill-down screen will allow you to search for and open a cabinet, folder, then subdivider to find the document you're looking for. In addition, there are search options within the document grid to narrow down your document list even further.

The screenshot shows the 'Explorer View' screen in PinPoint 2.96. It features a cascading drill-down menu for folders: Commercial Property, 110 Park Place Complex, American Red Cross, and Contracts. Below the menu is a document grid with the following data:

Action	Document	Document Type	Tab	Status	First Field	Second Field	Third Field	Document Date	Entry Date
<input type="checkbox"/>	RS for Electronic Repository for Records Management v1 0 (3).pdf			Checked In				10/20/2014	10/20/2014

Our newest search option, called Express View, allows you to search on a cabinet and folder. In addition, you can include a date range, an OCR search, a Meta Data search, and a Document Type search, all on one screen. This search is helpful for finding a document quickly, or for finding documents that contain a certain word or phrase.

The screenshot shows the 'Express View' search interface. At the top, it indicates 'PinPoint 2.96' and 'Doctors Hospital at Renaissance'. The search criteria are set to 'Commercial Property' under 'Cabinet Type'. Below this, there are search filters for 'Location', 'Sq Footage', and 'Owner'. A table lists search results for 'American Red Cross' with details on location and owner. The 'Documents in American Red Cross' section includes search filters for 'From', 'To', 'OCR Text', and 'Meta Data'. A document grid is displayed with columns for Document, Folder, Sub Divider, Document Type, Tab, Status, Document Date, Entry Date, and eight numbered fields. One document is listed: 'RG for Electronic Repository for Records Management v1 0 (3).pdf' located in 'American Red Cross' under 'Contracts', with a status of 'Checked In' and dates of '10/20/2014'.

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Document View is a basic search that will allow you to search on a certain document type, while including a date range (if you wanted). You'll notice similar search options within the document grid to help you narrow down your list of results.

The screenshot shows the 'Documents View' search interface. It is titled 'Documents View' and shows search details for 'Document Type' set to 'Applications'. The search results are displayed in a grid with columns for Select, Student ID, Address, Address 2, City, State, Zip Code, Release for Production, and Folder. The results list several documents with their respective addresses and folders.

Select	Student ID	Address	Address 2	City	State	Zip Code	Release for Production	Folder
<input type="checkbox"/>	123456							Caruso, Patrick
<input type="checkbox"/>								Ron Smith
<input type="checkbox"/>			123456					MonthEnd
<input type="checkbox"/>				Conrad, Kevin				18737786
<input type="checkbox"/>		123456						ABC Cleaning Svc.
<input type="checkbox"/>		343434						Caruso, Patrick
<input type="checkbox"/>		343566						Conrad, Kevin
<input type="checkbox"/>		343566						Conrad, Kevin
<input type="checkbox"/>		343566						Conrad, Kevin

Content search is another way to include an OCR search, while also searching on various other criteria. For example: Cabinet Type, Document Type, date range, subdivider, and tags).

The screenshot shows the 'Content Search' interface. At the top, there are navigation tabs: Filing, Locating, Workflows, and Admin. Below this is the 'Search Details' section with various filters:

- Folder: Personal Folder, Private Folder, Default Cabinet Folder (selected)
- Document Type: Dropdown menu (selected: '<- Select Document Type ->')
- From: Text input field
- Cabinet Type: Dropdown menu (selected: 'Commercial Property')
- Sub Divider: Dropdown menu (selected: '<- Select Sub Divider ->')
- Content Field 1, 2, 3, 4: Each with a text input and an 'AND' dropdown
- Tag: Dropdown menu (selected: '<- Select Tag ->')
- Document Tab: Dropdown menu (selected: '<- Select ->')
- To: Text input field
- Relation: Dropdown menu (selected: '<- Select Relation ->')
- Buttons: Search, Clear

 Below the filters is a table with the following columns: Action, Document Name, Cabinet Type, Sub Divider, Folder, First Field, Second Field, Third Field, Document Type, Document Type Tab, Status, Document Date, and Entry Date.

Action	Document Name	Cabinet Type	Sub Divider	Folder	First Field	Second Field	Third Field	Document Type	Document Type Tab	Status	Document Date	Entry Date
	Office Agreement	Commercial Property	Contracts	Naperville Business Complex	Suite 510	Open	N/A	Lease	2014	Checked In	10/20/2014	10/20/2014
	office.jpg	Commercial Property	Floor Plans	Naperville Business Complex	Suite 127	1000		Property Floor Plan	Town Home	Checked In	10/20/2014	10/20/2014
	RS for Electronic Repository for Records Management v1 0 (3).pdf	Commercial Property	Contracts	American Red Cross						Checked In	10/20/2014	10/20/2014

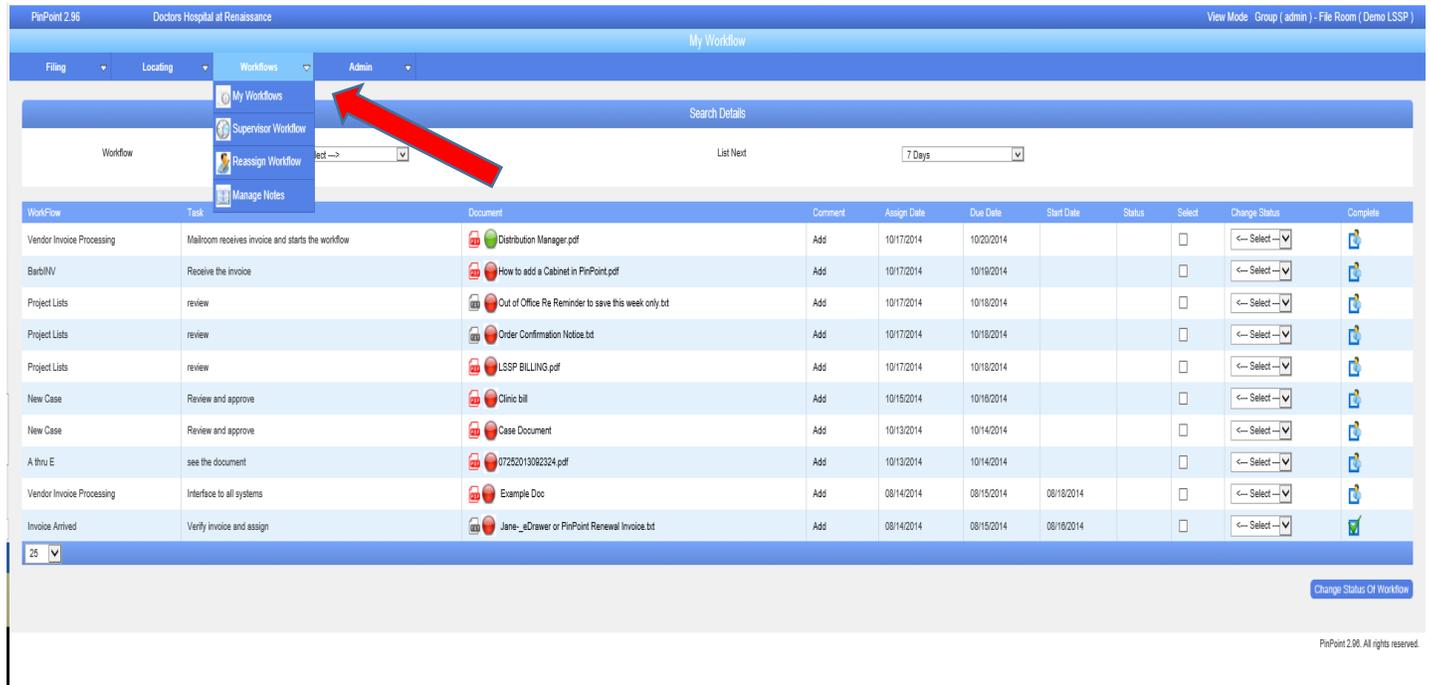
Finally, there is a Metadata SOS search. This is helpful when you want to pull up any folders and/or document types that contain a certain piece of metadata. Remember, this is not searching on the content of the document, but on the metadata that a user entered as part of the document.

The screenshot shows the 'Meta data SOS Search' interface. At the top, there are navigation tabs: Filing, Locating, Workflows, and Admin. Below this is the 'System Meta Data Search' section:

- System Meta Data: Text input field containing 'abc', with Search and Clear buttons.
- Folder: Personal Folder, Private Folder, Default Cabinet Folder (selected)
- Section Headers: Cabinet Type Details, Document Type Details
- Results List:
 - Cabinet Meta Data
 - XYZABC
 - ABC Inc. LLC
 - ABC Consulting
 - abc
- Buttons: fx icon, 25 (dropdown), and navigation arrows.

STARTING AND COMPLETING A WORKFLOW

An important function of PinPoint is the Workflow. PinPoint can do serial or sequential workflows. This means that workflow tasks can be setup so they move from one person to another after each task is complete, or you can tell PinPoint that a task cannot move to another person until several assigned users complete one particular task first. We discussed setting up workflow tasks in the administrative menu. Here, we will discuss how to start and complete a workflow that has been assigned to you. You can access workflows waiting for you in two ways: the **Dashboard**, or by selecting **My Workflows** under **Workflows**.



WorkFlow	Task	Document	Comment	Assign Date	Due Date	Start Date	Status	Select	Change Status	Complete
Vendor Invoice Processing	Mailroom receives invoice and starts the workflow	Distribution Manager.pdf	Add	10/17/2014	10/20/2014			<input type="checkbox"/>	<-- Select -->	
BarbINV	Receive the invoice	How to add a Cabinet in PinPoint.pdf	Add	10/17/2014	10/19/2014			<input type="checkbox"/>	<-- Select -->	
Project Lists	review	Out of Office Re Reminder to save this week only.bt	Add	10/17/2014	10/18/2014			<input type="checkbox"/>	<-- Select -->	
Project Lists	review	Order Confirmation Notice.bt	Add	10/17/2014	10/18/2014			<input type="checkbox"/>	<-- Select -->	
Project Lists	review	LSSP BILLING.pdf	Add	10/17/2014	10/18/2014			<input type="checkbox"/>	<-- Select -->	
New Case	Review and approve	Clinic bill	Add	10/15/2014	10/16/2014			<input type="checkbox"/>	<-- Select -->	
New Case	Review and approve	Case Document	Add	10/13/2014	10/14/2014			<input type="checkbox"/>	<-- Select -->	
A thru E	see the document	07252013092324.pdf	Add	10/13/2014	10/14/2014			<input type="checkbox"/>	<-- Select -->	
Vendor Invoice Processing	Interface to all systems	Example Doc	Add	08/14/2014	08/15/2014	08/19/2014		<input type="checkbox"/>	<-- Select -->	
Invoice Arrived	Verify invoice and assign	Jane_Drawer or PinPoint Renewal Invoice.bt	Add	08/14/2014	08/15/2014	08/19/2014		<input type="checkbox"/>	<-- Select -->	

You'll notice a few symbols. The green circle is displayed next to documents that have not been started by you, by selecting it you set your task in motion. A yellow circle means that task has been started, but has not been completed yet. A red circle means the task has not been started and is considered overdue. At the end of each task's row, you'll see either a green check or a man; green check means you are in process and can complete the task, the man means you still have to begin your task.

To access the file to complete your task, select the document. Just above the document viewer, you'll notice the same green thumb. You can start the workflow by selecting the green thumb here. A green checkmark within a blue box will appear; when your task is complete, you will select this check mark.

Your administrator assigned a number of days for you to complete your task, *selecting the green thumb begins that countdown.* **Only select the green thumb if you are ready to begin that task.**