User Reference Guide

PinPoint Document Management System

Contents

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).

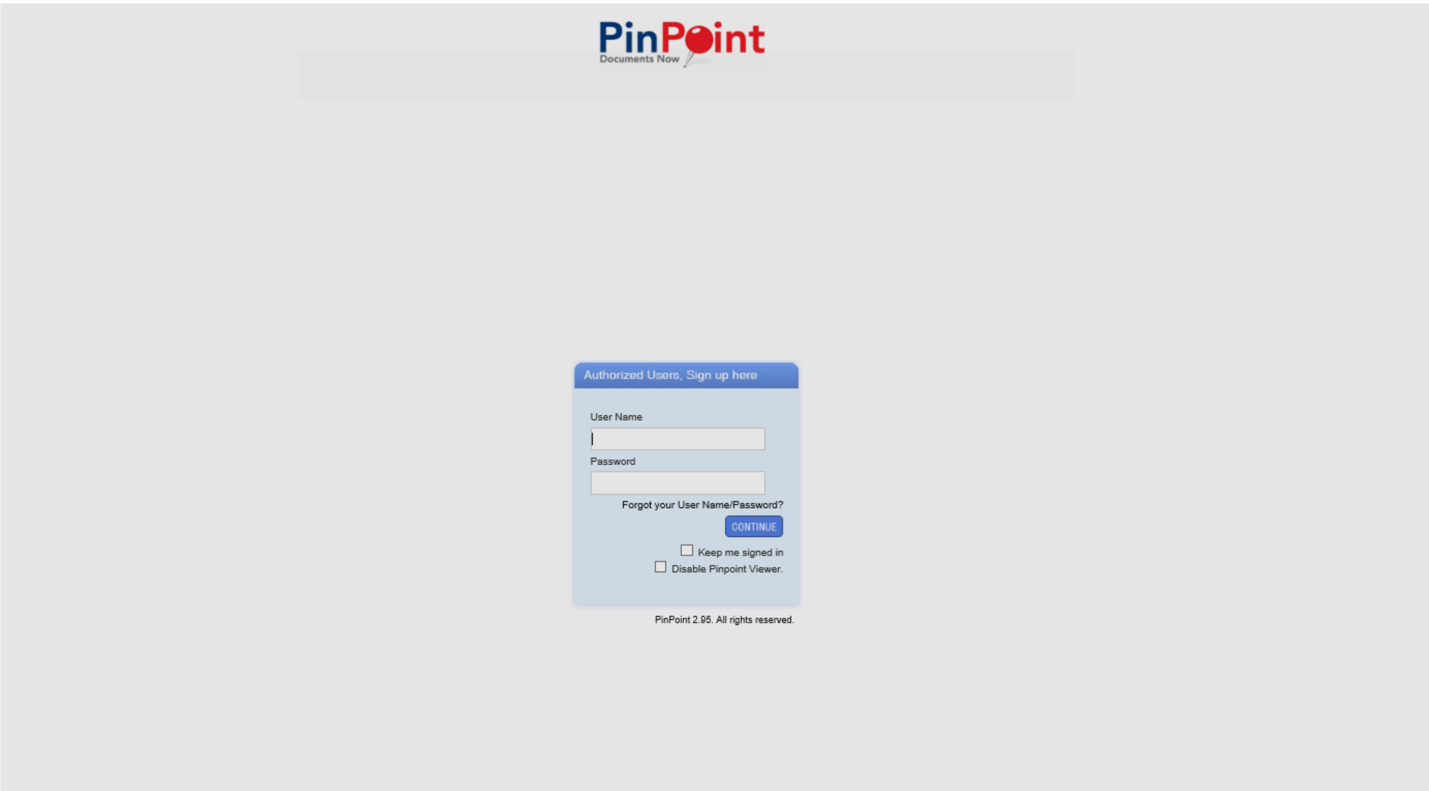
You can also use editable PDF forms and have a forms library allowing users to fill in forms and to monitor those forms. These could even be used in workflow or for any process that you have.

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 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.

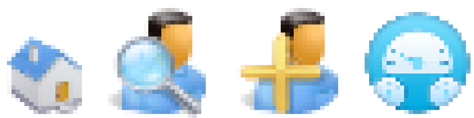
Below that, to the left **(In Progress)** shows documents you currently have checked out from PinPoint. To the right **(Workflow)** shows any workflow tasks waiting for you to complete.

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.

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.



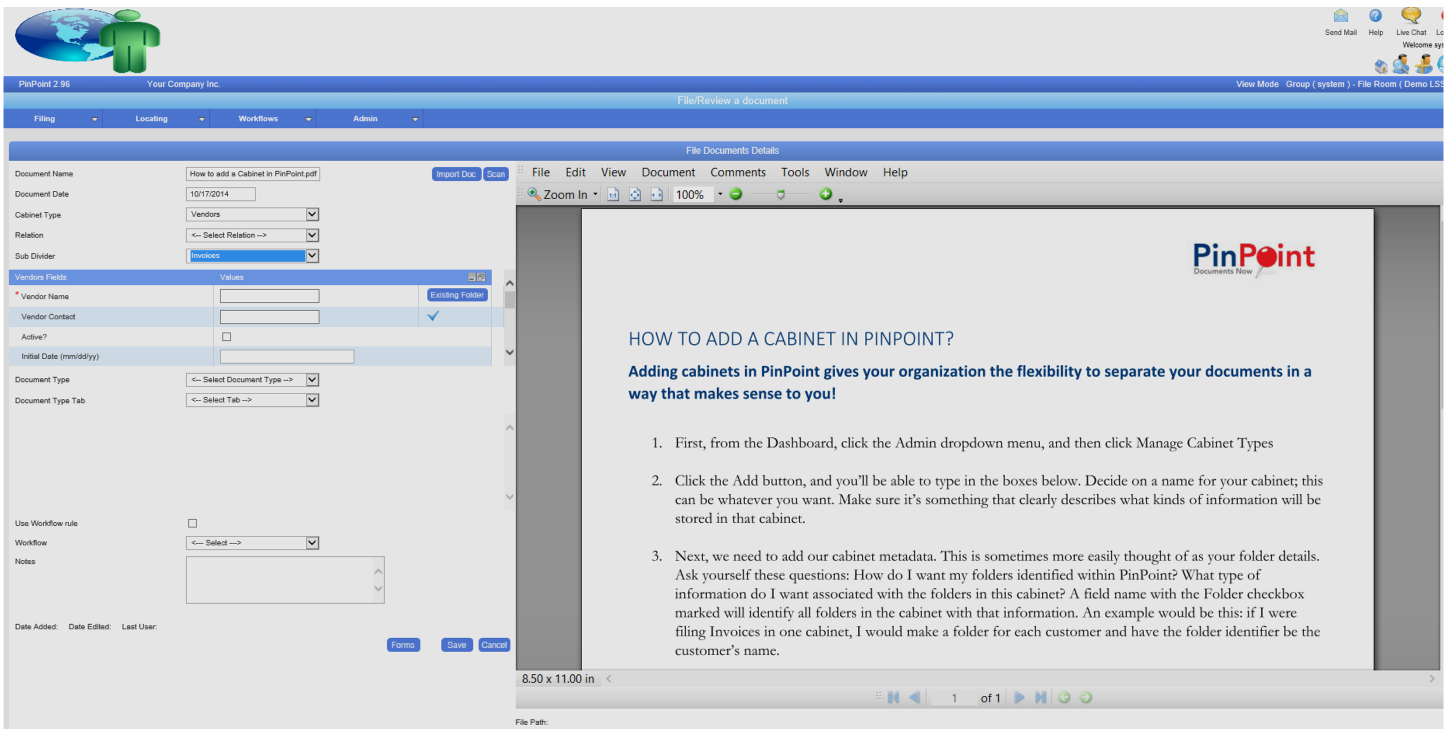
To access your profile, click on your user name in the upper right hand corner, and you'll be taken to a screen that will allow you to personalize your PinPoint experience.

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.

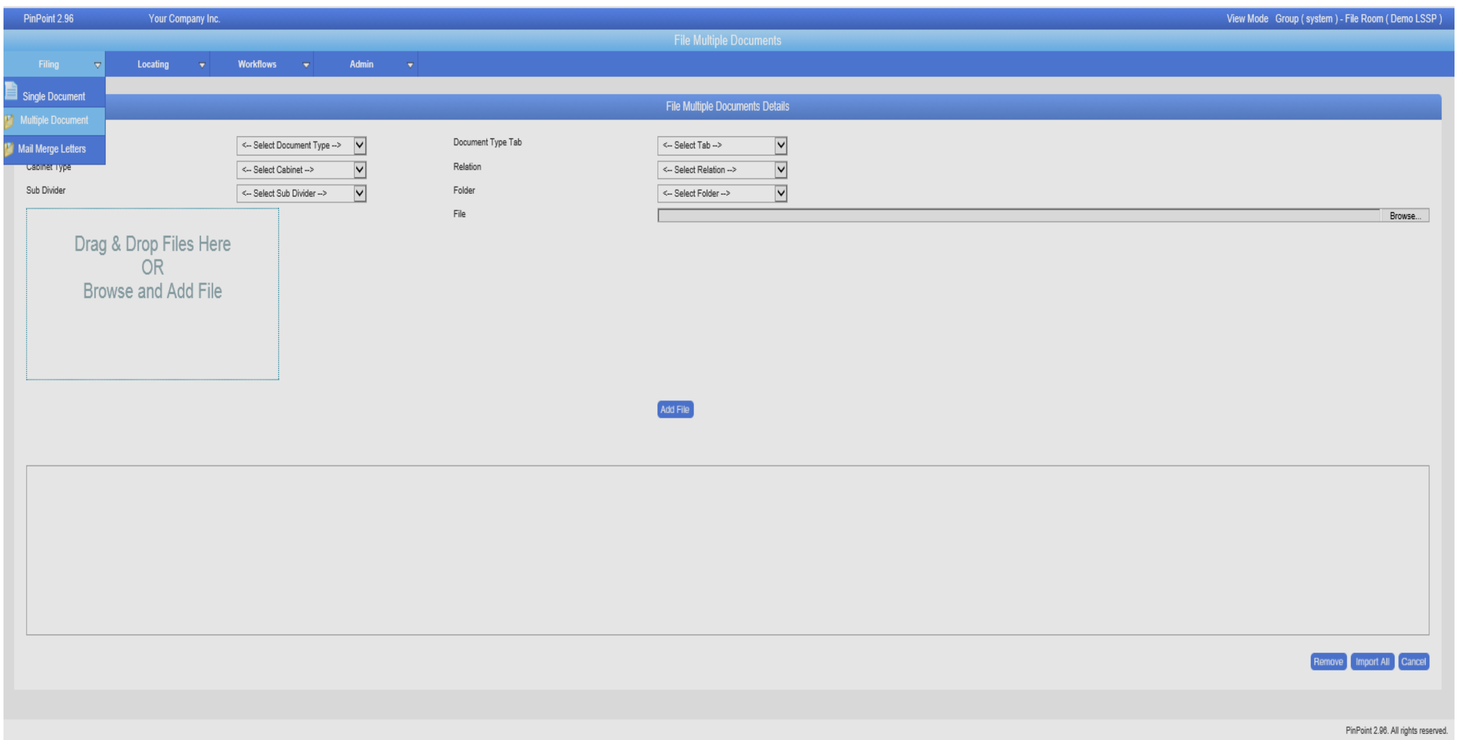
You can import or scan the document in at any time, but will need to do so before you can save the information you've entered.



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.

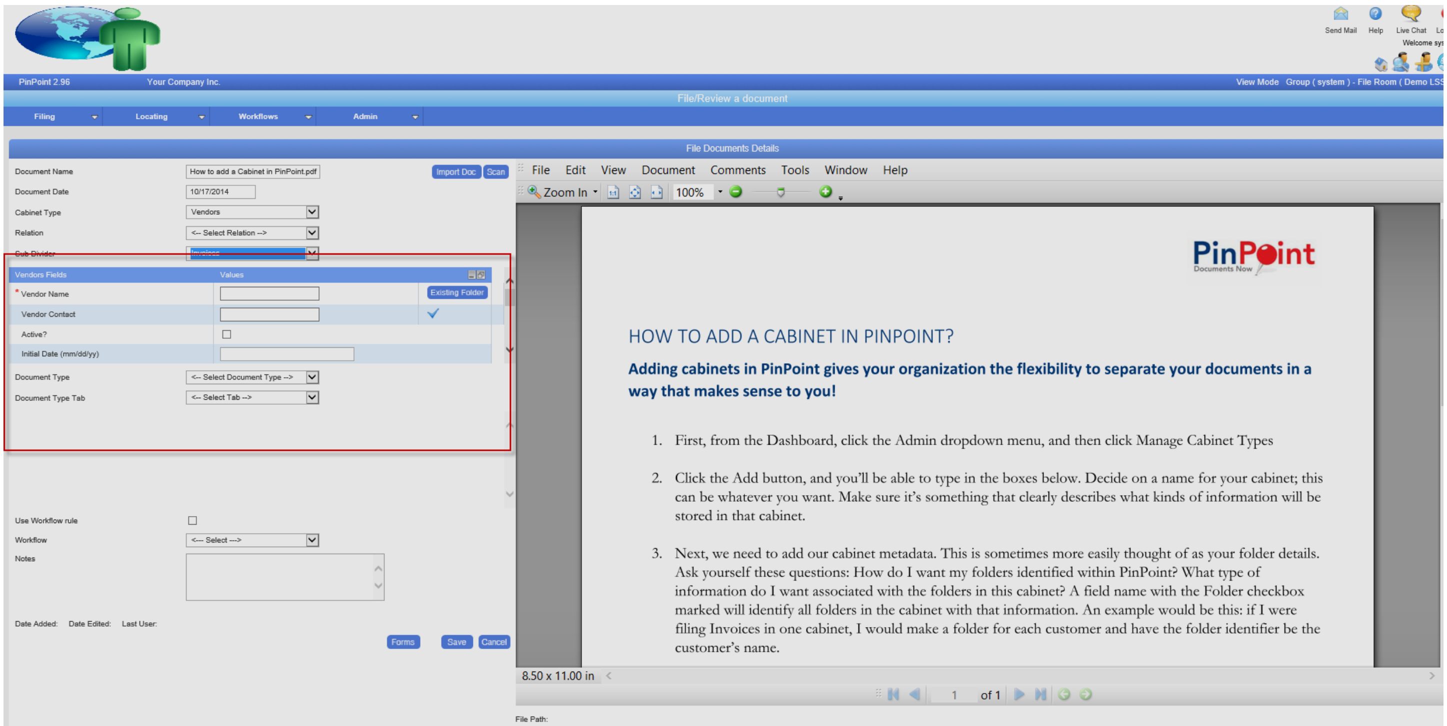
You can also drag and drop files from your workstation into PinPoint, and they will be uploaded automatically. This is helpful if you have quite a few documents that you need to add at one time or documents that need to go to separate folders. Again, click Import All once you've dropped in all your files,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

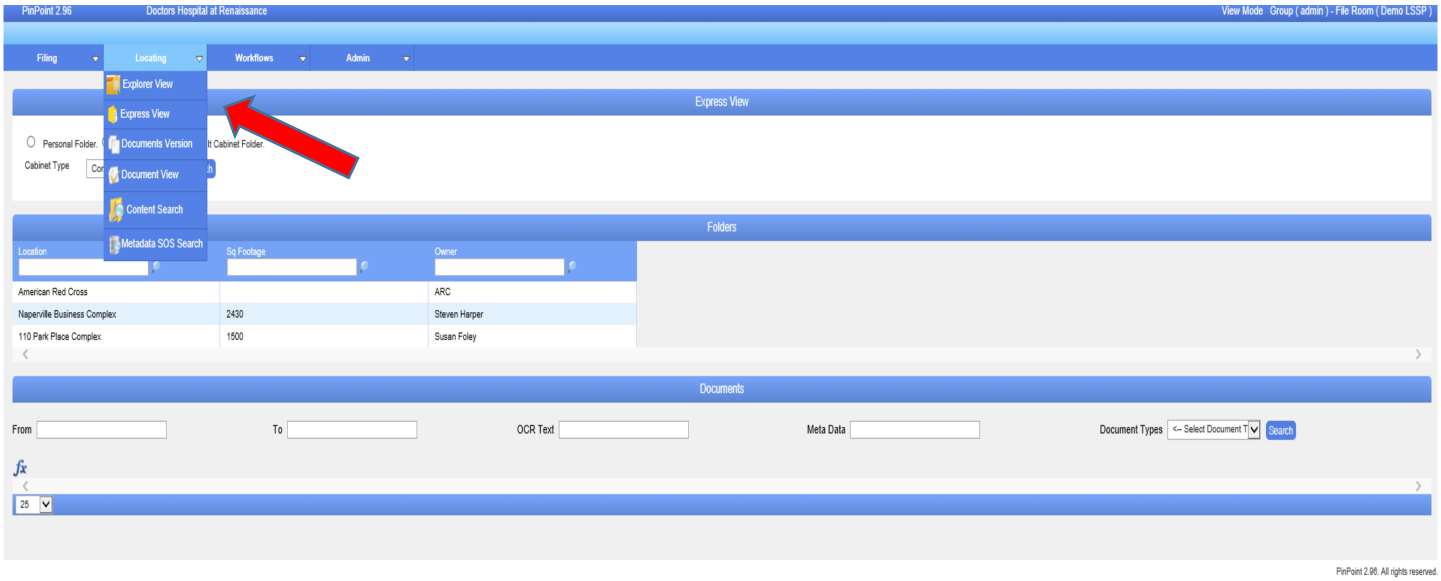


You can also add a folder without filing a document. From the top, select **Admin → Setup → Manage Folders.** As in the previous example, we recommend checking to see if a folder has already been created before adding another one.

SEARCHING FOR DOCUMENTS

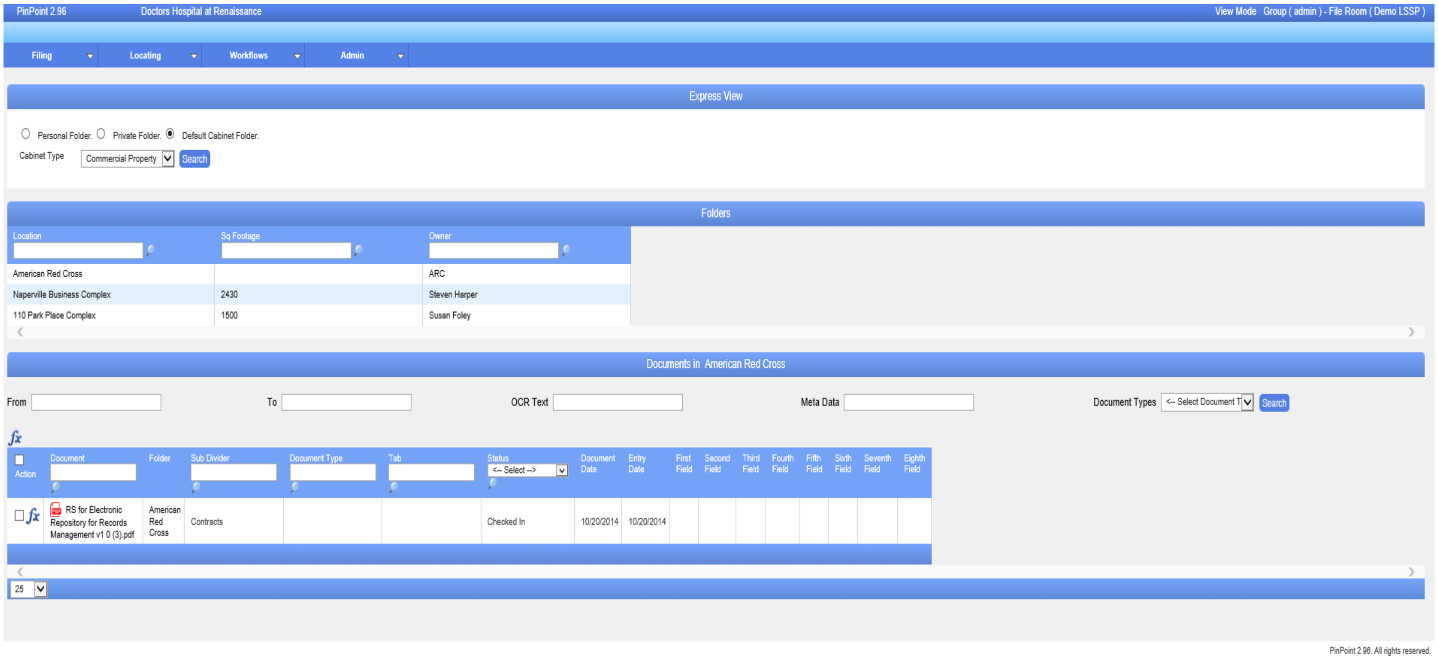
Searching for documents within PinPoint can be accomplished several different ways. Choosing your search method is often a matter of personal preference, or your ultimate goal.

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

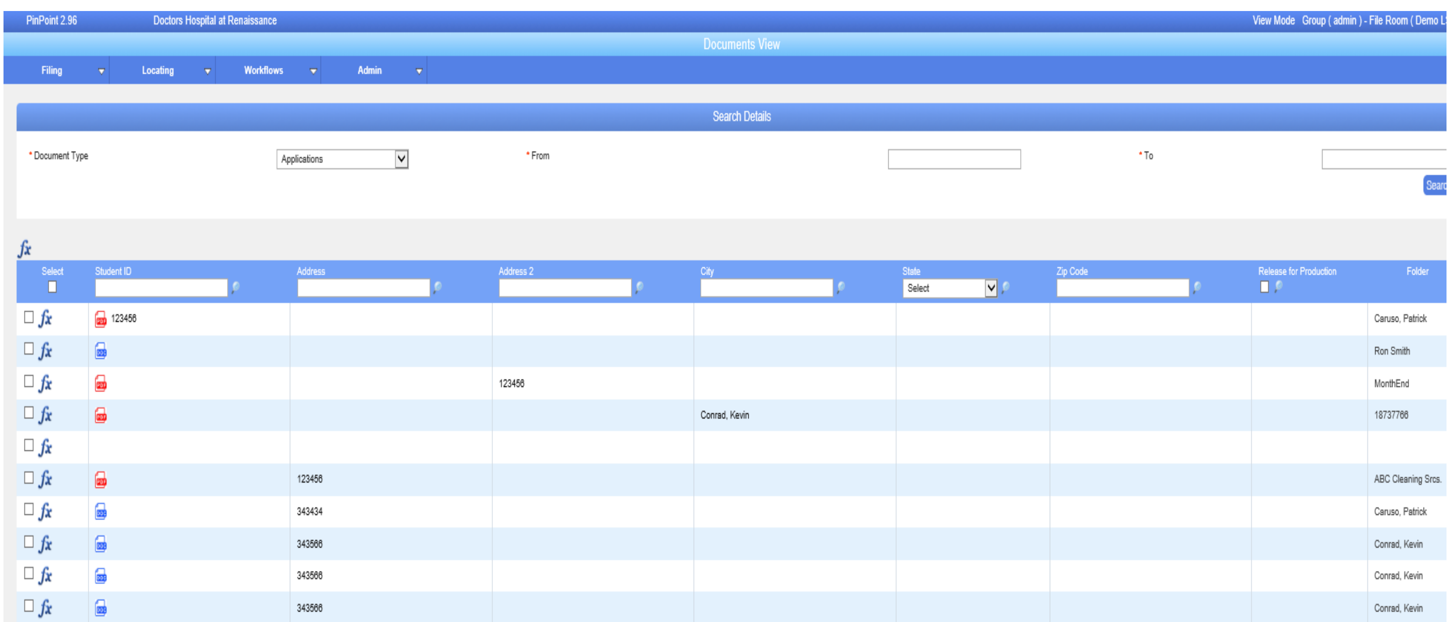


First, we'll discuss Explorer View. This cascading drill-down screen will allow you to search for and open a cabinet, folder, then subdivider to find the document you're looking for. In addition, there are search options within the document grid to narrow down your document list even further.

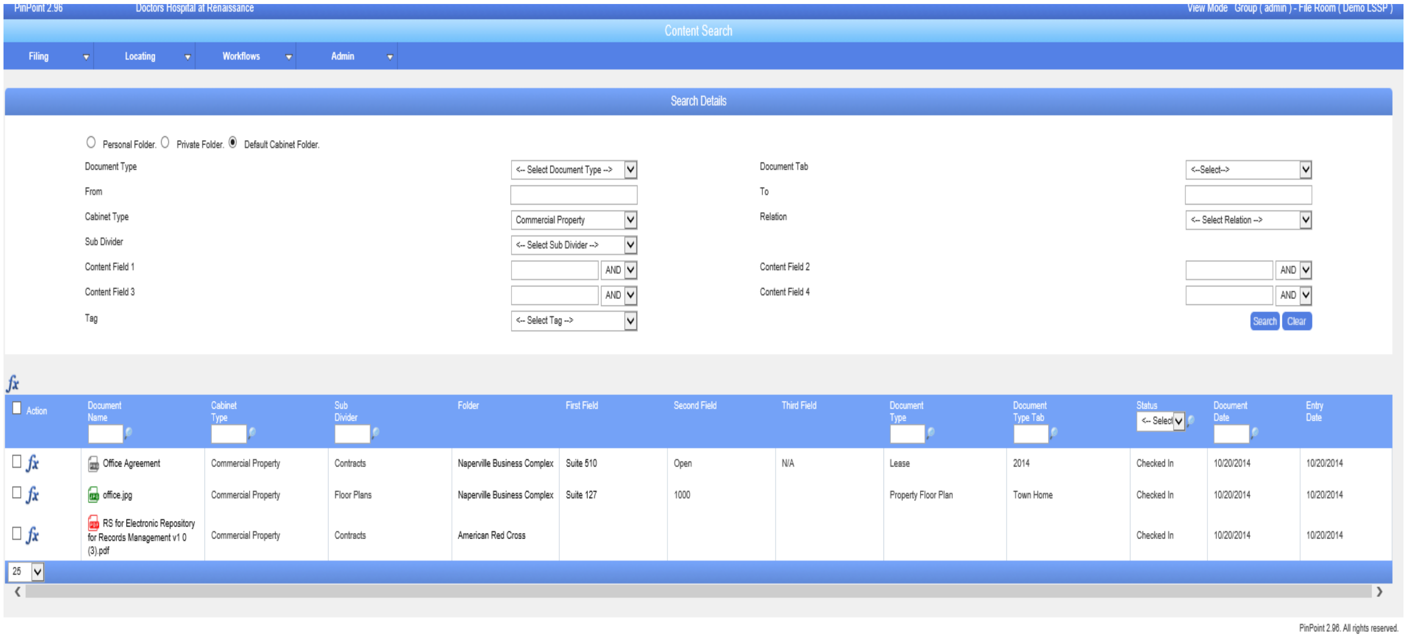
Our newest search option, called Express View, allows you to search on a cabinet and folder. In addition, you can include a date range, an OCR search, a Meta Data search, and a Document Type search, all on one screen. This search is helpful for finding a document quickly, or for finding documents that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



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.



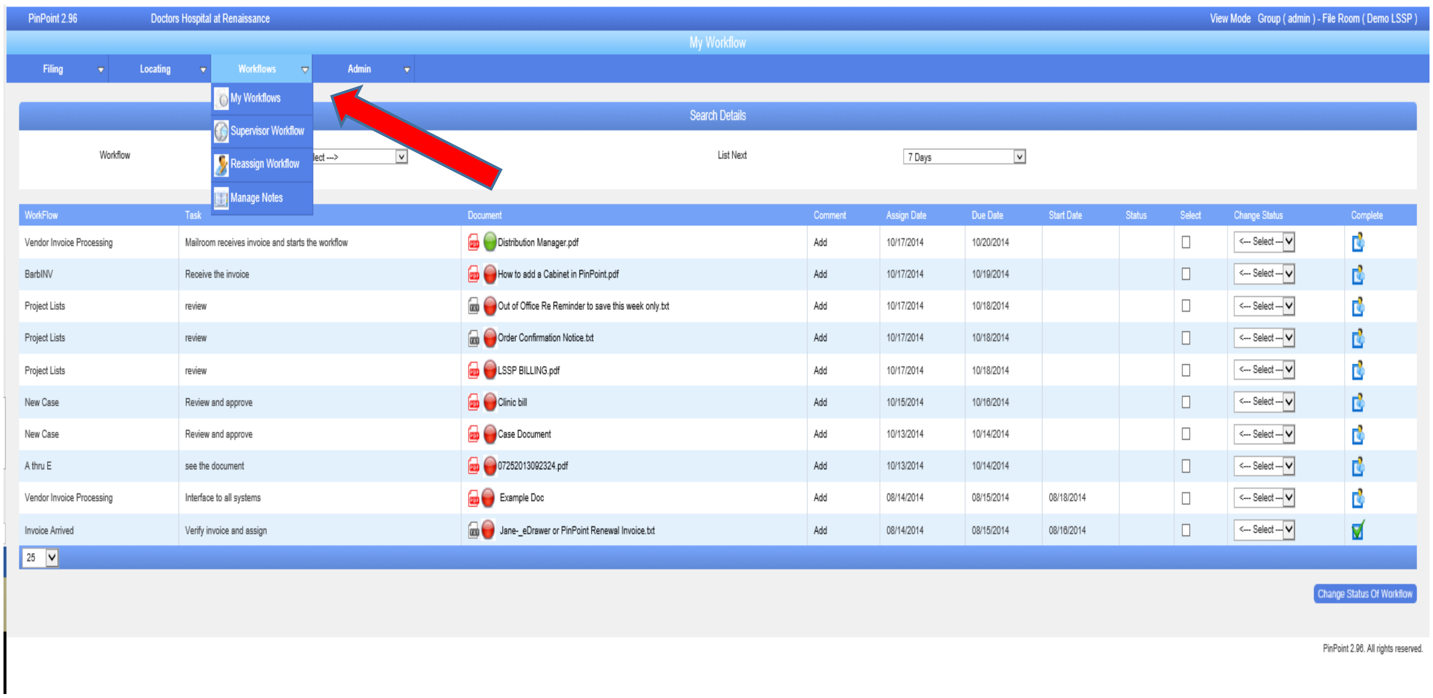
Content search is another way to include an OCR search, while also searching on various other criteria. For example: Cabinet Type, Document Type, date range, subdivider, and tags).



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.

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.**



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.**