INTRODUCTION

Using this guide, you will be able to set up the basic structure of your new PinPoint database.

To get started and begin adding documents to your system, you will need to have users, security groups, an initial structure to add to, and a document type.

TABLE OF CONTENTS

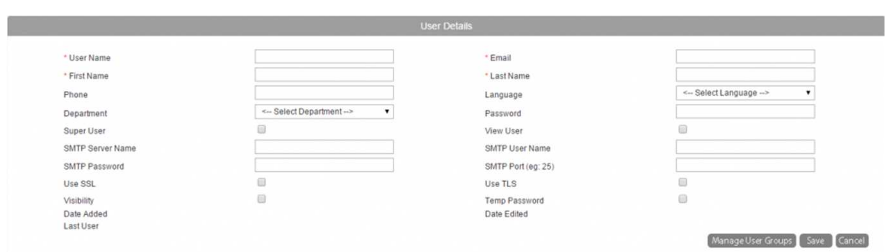
SETTING UP USERS AND SECURITY GROUPS

When your database has just been created, only one user account exists: admin. The admin account has full rights to the system and can add users as well as security groups for those users to belong to.

Security groups have their own set of access and permission levels, and individual users within those groups can have more personalized permission levels. Users can belong to multiple security groups as well.

Adding Users

Admin > Security > Users



When creating a user, there are five fields that are required: **User Name, Email, First Name, Last Name, and Password.** Each box will need

The user will have the option to either assign the user a password, or you can elect to send them a Temporary Password. Notice the field checkbox called **Temp Password.** Checking this box will send a temporary password to the new user's email. Once that user has logged in with their Temporary Password, they can change their password at any time by accessing their profile screen "Welcome [username]". Passwords must be at least 8 characters and include at least one of the following:

- Uppercase letter
- Lowercase letter
- Number

You will also notice the optional department and language drop-down boxes. The department and language information will only show in the User Details screen and is only used as a description on the user profile for your administrators.

Notice the box referred to as **Super User**. By clicking on this box, the user will have access to all cabinets, folders and documents within the system. When the super user logs in, if they are in multiple groups, then they will have the security rights of whichever group they login as. Only Super Users and administrators have access to all documents unless your security settings are very global.

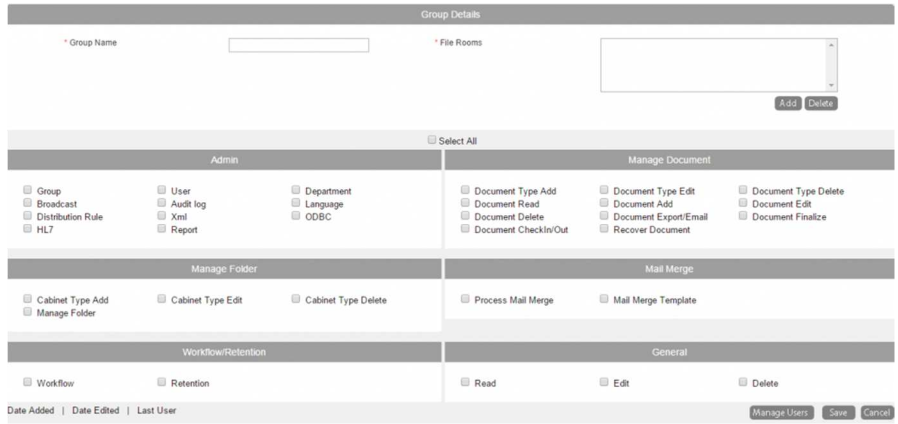
You will also notice a box referred to as **View User**. If you check this box, the user will be directed immediately to a more limited client/view portal without the ability to use the standard system screens.

Towards the bottom you will notice that there are fields such as **SMTP User Name, SMTP Server Name, SMTP Password and SMTP Port**, as well as an **SSL box**. If you elect to allow this user to send emails from the system, then you will need to put in the SMTP User Name and SMTP Server Name. This is most likely the same email as above, but the email shown above in the user details is used when the administrator needs to send the password or other information and notifications. You can find your SMTP settings within your email account.

If this user has the same SMTP port for outbound email and server name shown here, then the only information that is needed is the SMTP Password and SMTP User Name. If this user is using something different (Ex. Gmail instead of their work e-mail), then that user will have to additionally fill out the SMTP server name and port and, potentially, the SSL settings. **These settings can be found by contacting your email service provider or IT department. LSSP does not have any information regarding your SMTP server, port, user name, password, and security requirements.**

Adding a Security Group

Admin > Security > Groups



Begin by typing in a group name and selecting or adding the fileroom(s) that the group will need access to.

Before a user can successfully login, they need to belong to a user group that has been assigned to a fileroom.

The settings to select below are for your users as their default based on the group they belong to, ***but each user can have their own settings within the group.***

Let's discuss each of the items. Under the **Admin** section, you can set a user to be able to access and update those administrative functions that are essential.

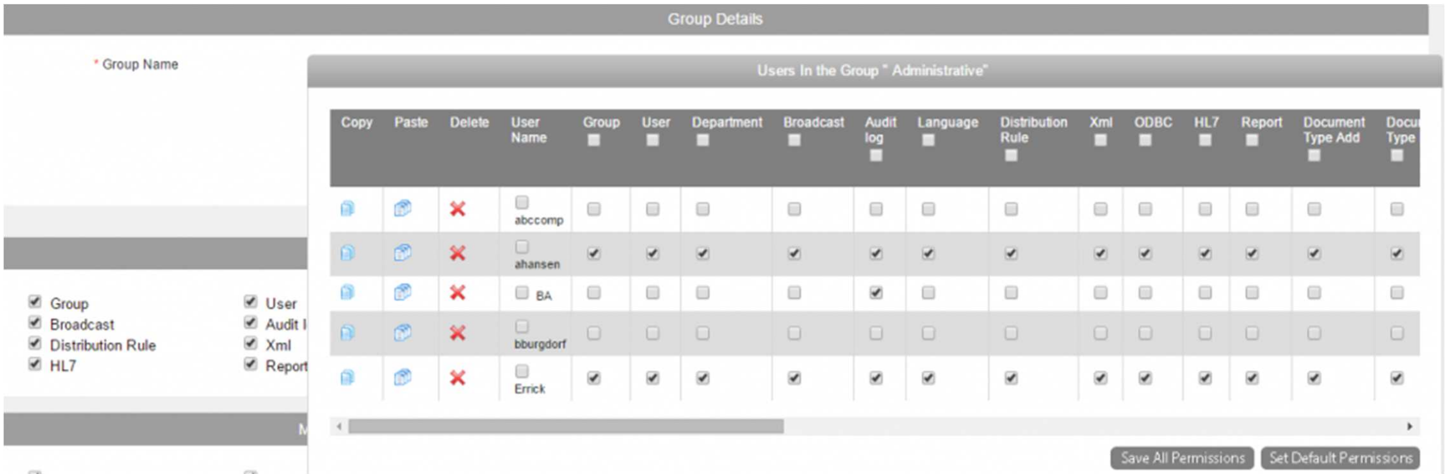
In the bottom right corner, there are options for read (add), edit, and delete. If this group will have default settings, which can then be changed according to user, then any settings that you mark under **Admin,** you will also need to mark whether they can just **read (add), edit, and/or delete.** Those functions, listed under **General,** also apply to workflow, retention, as well as mail merge template and manage folder.

You'll also notice that there is a **Manage Document** section that has functions such as add, edit, delete, read, export, check-in/out, and finalize; those are specific to the document handling.

In **Mail Merge**, there are two options. If you elect this group to produce mail-merge letters, then they should be allowed to Process Mail Merge. If they are to build mail-merge templates, then the mail merge template box would be checked.

Under **Workflow/Retention**, you decide whether or not the user has the ability to add/change workflows and retention settings.

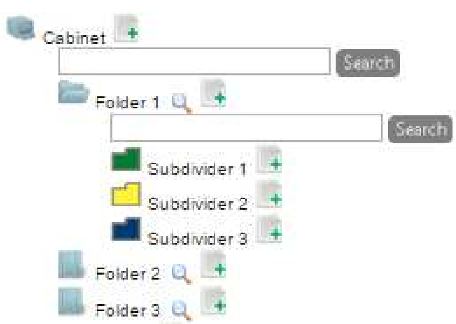
Once again, remember, these will be the *default settings for the group,* but you can override all rights at the user level when you are ready.



Once you have established the group permissions and saved, you can reopen the group and click on **Manage Users.** You can now add users to the group and change the security allowances from default to the specific needs for individual users within that group. You can use the top column above the names or to the left of the names to include or not include that column. "Save All Permissions" when you are finished.

SETTING UP THE INITIAL STRUCTURE

The basic structure of your database is as follows:

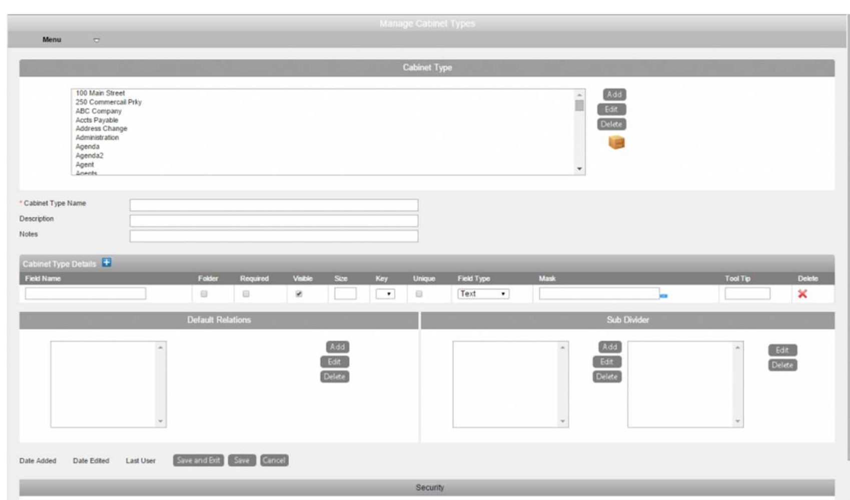


Creating a Cabinet

Admin > Setup > Cabinet Types

First click the Add button. Decide on a name for your cabinet; this can be whatever you want. Make sure it is something that clearly describes what kind of information will be stored in that cabinet. Adding a description and notes is optional.

Next, we need to add our cabinet metadata fields. This is sometimes more easily thought of as your folder details.

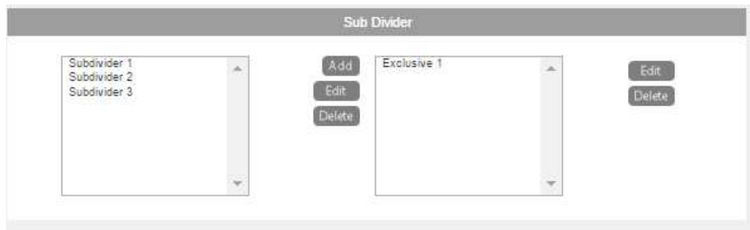


Ask yourself these questions:

1. How do I want my folders identified?
2. What type of information do I want associated with the folders in this cabinet?

The field name with the "Folder" check box marked (can only have one per cabinet) will identify all folders in the cabinet with that information. An example would be this: if I were filing Customer Invoices in one cabinet, I would make a folder for each customer and have the folder identifier be the customer's name.

Subdividers



Next, we need to think about the subdividers in this cabinets' folders. Just like those colorful tabs you can buy at an office supply store, subdividers offer another level of organization for your documents. You can have as many or as little as you need, but you will need to have at least one. If you don't feel that you will need to use subdividers, you can make one that simply says ALL or DEFAULT.

To create subdividers for use by any folder in the cabinet, click on the add button for the section on the left, enter a name, and save.

Subdividers can be created exclusively for specific folders within the cabinet when adding a document – those are all shown in the box on the right.

Once you have all of that information entered, click Save. You will then see the Security information pop up below.

Cabinet Security

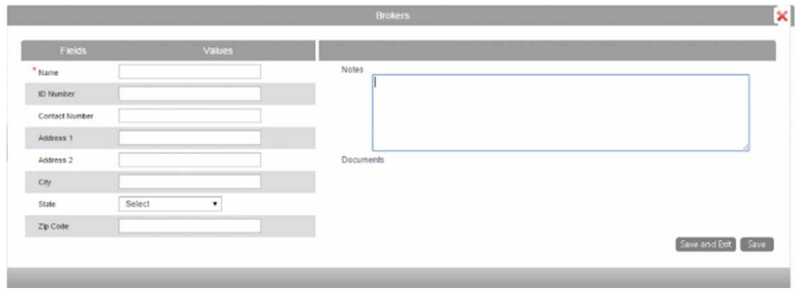
At this point, you need to decide which groups/users can have access to this cabinet. You can click to add whichever groups you want to have access, in addition to individual users. Once you have added your user groups/individual users, click Save and Exit.

Your new cabinet is now created!

Creating a Folder

Admin > Setup > Manage Folders

Previously, when we discussed creating cabinets, we talked about creating **metadata fields** (folder details) for each cabinet. One field had to be marked as the "**Folder" identifier**; this is how folders are named within the system. For example, a cabinet dedicated to Vendors might want to have their folders named either Vendor Name or Vendor ID.



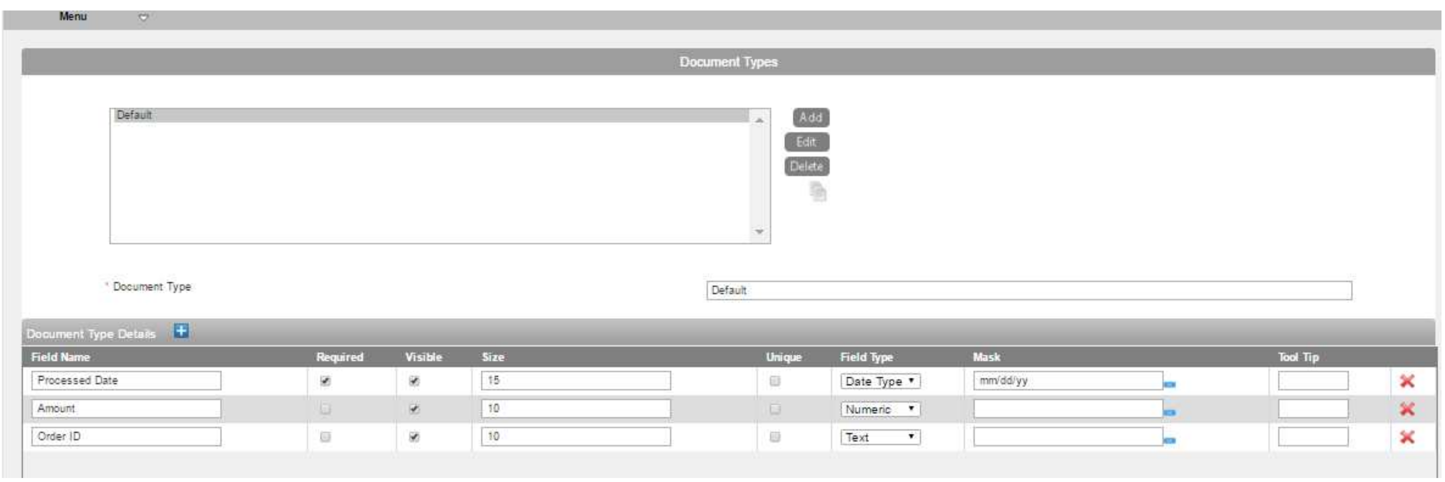
1. Begin by selecting the **Cabinet Type,** then click **Add Folder**.
2. Fill in all of the required metadata fields for your folder (all with a red asterisk).
3. Click Save.

Folders can also be created while filing a document. Once you have selected the cabinet your document belongs to, you can add a folder on the fly by simply typing in the information (metadata) for this new folder.

A word of caution, if you are filing a document into a folder that has already been created, select "Existing Folder" next to the metadata information and select the correct folder. Typing in the folder name and saving will create a duplicate folder.

CREATING A DOCUMENT TYPE

Admin > Setup > Document Types



First click the Add button. Decide on a name for your document type; this can be whatever you want. Make sure it is something that clearly describes what kind of document will be filed under this document type. You can also simply use a generic name such as DEFAULT or ALL, and file all documents under that one Document Type.

Next, we need to add our document metadata fields. Adding these fields is very similar to adding metadata fields to your cabinet type earlier. You can add as many fields as you'd like, as well as make them required. Unchecking the Visible box will hide that field from all non-admin and super users.

After adding your metadata fields, you must add at least one Document Type Tab. These tabs can be used to further separate your documents for filtering purposes. Some examples include adding years (calendar or fiscal) as Document Type Tabs or using different branch names to identify where an invoice came from.

Before saving the Document Type, you have two more choices to make.

1. Does the Document Type have a retention set? While setting up your first Document Type, you will not have set up any retention rules if you are following along with this document. Check Retention Disabled for now, and see the manual for more information on Document Retention.
2. You can set this document type to process OCR for all pages, only the first page, from page X to page Y, or no OCR at all. OCR stands for Optical Character Recognition – setting one of these options indicates that you would like our system to identify all text on the defined pages and store that text with the document record. OCR text stored can be searched for at several different screens.

Once you have all of that information entered, click Save. You will then see the Security information pop up below.

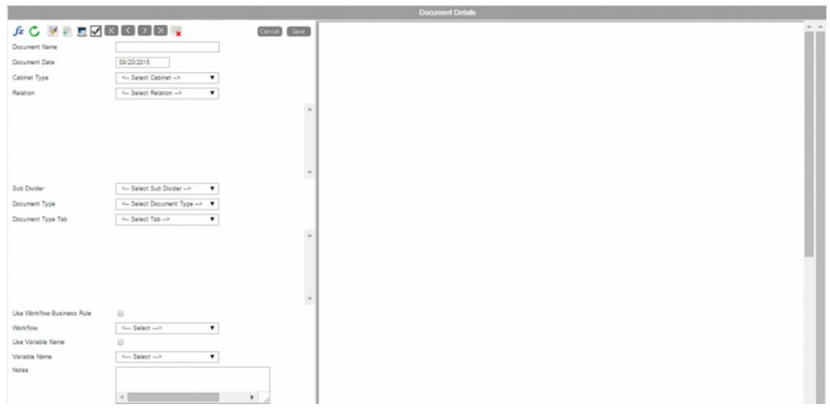
Document Security

At this point, you need to decide which groups/users can have access to this document type. You can click to add whichever groups you want to have access, in addition to individual users. Once you have added your user groups/individual users, click Save and Exit.

Your new Document Type is now created!

ADDING YOUR FIRST DOCUMENT

Menu > Filing > Single Document



You will have the option to Import a Doc from your workstation, or Scan directly (if your scanner has the proper drivers to do this, or you are setup on our Cloud).

1. Complete the information about the document, listed on the left side of the screen. This includes the Document Name, Document Date, Cabinet Type, Folder, Subdivider, Document Type, and Document Type Tab.

   Note: If you are adding a document to an Existing Folder, click on the "Existing Folder" button after you have selected your cabinet. If you need to create a new folder at the same time as you import/scan a single document, instead of clicking on "Existing Folder," just simply type in the required metadata fields then hit save when you are finished. Typing in the metadata will create a new folder at the same time as you import/scan a document in.

2. Complete the required metadata associated with the Cabinet Type and the Document Type (All with a Red asterisk are required).

3. Import or scan the document in at any time, but will need to do so before you can save the information you have entered.

4. Click Save when done, and your file will be uploaded to the database!