

INTRODUCTION

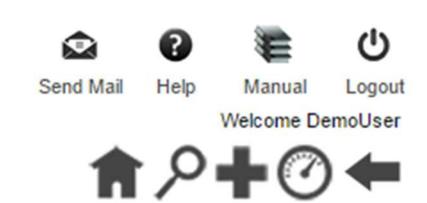
This guide includes information on some of the most commonly used functions in the PinPoint system. If your account has additional permission to create structure, workflow, or access to other administrative tasks, please see our Admin Guides.

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MANAGING YOUR USER PROFILE

To access your User Profile, click on “*Welcome [username]*” in the upper right hand corner of the system.



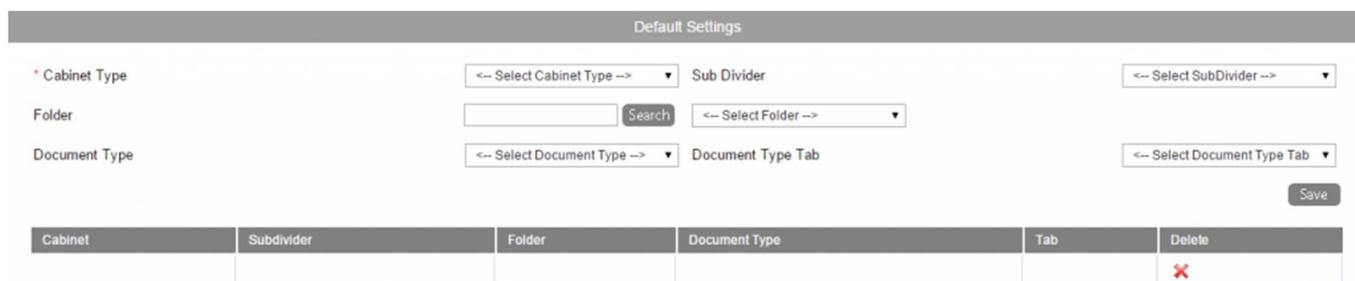
User Details: Define basic user preferences, including the email address and password. Use this screen to change your password from the one given to you by your administrator. The first time you login you will be asked to select a **Security Question and Answer**. Until you do so, each time you login, you will be sent directly to your User Profile, rather than your selected Home Page.

User Details			
* User Name	DemoUser	* Password	*****
* Email	email@email.com	* First Name	Demo
* Last Name	User	Phone	
Language		Department	
SMTP Server Name		SMTP User Email	
SMTP Password		SMTP Port (eg: 25)	0
Use SSL	<input type="checkbox"/>	Use TLS	<input type="checkbox"/>
Skin Type	Cupertino	Google Translate	<input checked="" type="checkbox"/>
Session End	<input type="checkbox"/>	Use Cookie	<input type="checkbox"/>
Enable PDF Tools	<input type="checkbox"/>	* Security Questions	What city/town were you born in?
Viewer Path		* Security Answer	*****
		<input type="button" value="Test Mail"/> <input type="button" value="Save"/>	

Favorite Screens: Define your “favorite” screens, which can be accessed using the icons in the upper right hand corner. You can define your favorite Home screen, Search screen, Filing screen, as well as the Dashboard you prefer. **This is not required.**



Default Settings: Define your default “location” into which you want to file your documents and search for documents. This is helpful if you consistently use the same location on a daily basis; the cabinet, folder, and document type will be preselected for you. **This is not required.**



ADDING PINPOINT AS A TRUSTED SITE

Only necessary in Internet Explorer

When you add a Web site to the Trusted Sites zone, you are instructing the computer that files you download or that you run from the Web site will not damage your computer or data. Not adding PinPoint as a trusted site will prevent documents from being saved (if annotated) or uploaded.

How to add trusted sites to Internet Explorer 9

1. On your Internet Explorer window, select the Gear icon, followed by Internet Options.
2. You will see a pop-up. Go to the Security tab.
3. Select the Trusted Sites icon, then click on the Sites button.
4. Enter **https://manageedocs.com** into the *Add this website to the zone* box, then click Add, and Close.

INSTALLING PDFXVIEWER

Optional, only for Internet Explorer

On your user profile (click Welcome [user name] in the top-right corner), you can enable PDFXViewer as the default PDF viewer only in PinPoint.

To enable PDFXViewer, check the box on your profile for Enable PDF Tools. Save your profile, then close all instances of Internet Explorer. When you log back in and open up any document or attempt to add a new one, you will be prompted to download and install PDFXViewer (by Tracker Software).

Click Run when prompted to install PDFXViewer. After installing (default options are all fine, and only the free version is needed), close Internet Explorer once more, then log back in.

When you login to PinPoint next time you may have to click “Allow” for PDFXViewer to run.

INSTALLING DYNAMIC WEB TWAIN

To scan directly into PinPoint, you will need to install the driver for Dynamic Web TWAIN, as well as have a TWAIN-compliant scanner set up for your computer.

When opening a document or adding a new one for the first time you will get the notice to install Dynamic Web Twain in the yellow message box at the bottom of the browser.

The first thing you may see is the message in the yellow box at the bottom of the browser asking to run the Microsoft License Manager DLL. Click Allow.

Next the yellow box message will ask if you want to install Dynamic Web TWAIN. Click Install.

After completing the installation process (default options are fine), close all instances of your browser and log back in.

ADDING A DOCUMENT

Adding a Single 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.

Note: If you click on the + sign to create a subdivider, that subdivider will be created exclusively for the folder this document is being added to. No other subdividers can be created for this cabinet with the same name. If a subdivider should be created for use in more than one folder within a cabinet, it should be added at the Manage Cabinet Types screen.

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!

Adding Multiple Documents

Menu > Filing > Multiple Documents

1. Select the **Document Type** and **Document Type Tab**.
2. Select the **Cabinet**, **Sub-Divider** and **Folder**.
3. **Drag-and-Drop** your documents in the box.
4. Click **Import All**.

The Multiple Drag-and-Drop 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.

Note: Whatever you have listed in the tabs above (Document Type/Tab, Cabinet/Sub-Divider, Folder, etc.) the moment you drop documents in the box, that is what the documents will be labeled as, as well as where they will be filed. Users can continuously change the tabs, and drag-and-drop as they go. Again, click **Import All** once you have dropped in all your files, and they will be added to the system in the location you specified.

The screenshot shows the 'File Multiple Documents Details' window. On the left, there are three dropdown menus: 'Document Type' set to 'Customer Sales', 'Cabinet Type' set to 'Brokers', and 'Sub Divider' set to 'Statements'. On the right, there are three more dropdown menus: 'Document Type Tab' set to '2013', 'Relation' set to '<-- Select Relation -->', and 'Folder' set to '<-- Select folder -->'. Below these is a file upload section with a 'Choose File' button, a text field containing 'No file chosen', and an 'Add File' button. A large dashed box on the left contains the text 'Drag & Drop Files Here OR Browse and Add File'. At the bottom right, there are three buttons: 'Remove', 'Import All', and 'Cancel'.

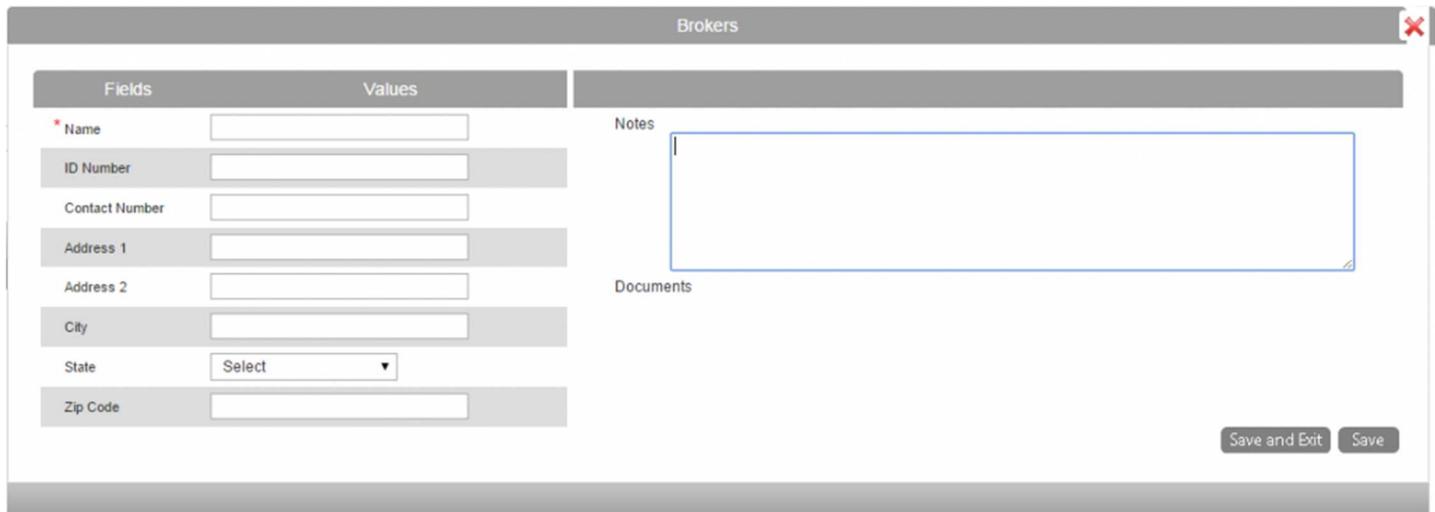
ADDING A FOLDER

If your account has permission to create new folders, you can create folders in two different places inside PinPoint.

Adding a Folder Through Manage Folders

Admin > Setup > Manage Folders

To add a folder, choose the cabinet you would like to add a folder to from the drop-down, then click add.



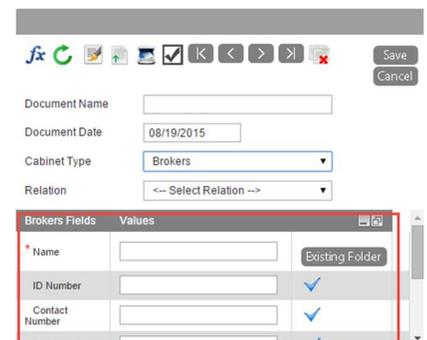
Enter the metadata for the folder in the box that pops up. These fields are defined at **Admin > Setup > Manage Cabinet Types**. If your account has permission to edit cabinets, you can add/edit metadata fields.

All fields with a red asterisk are required fields. Click Save and Exit when done to save your new folder.

Adding a Folder Through File a Single Document

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.*

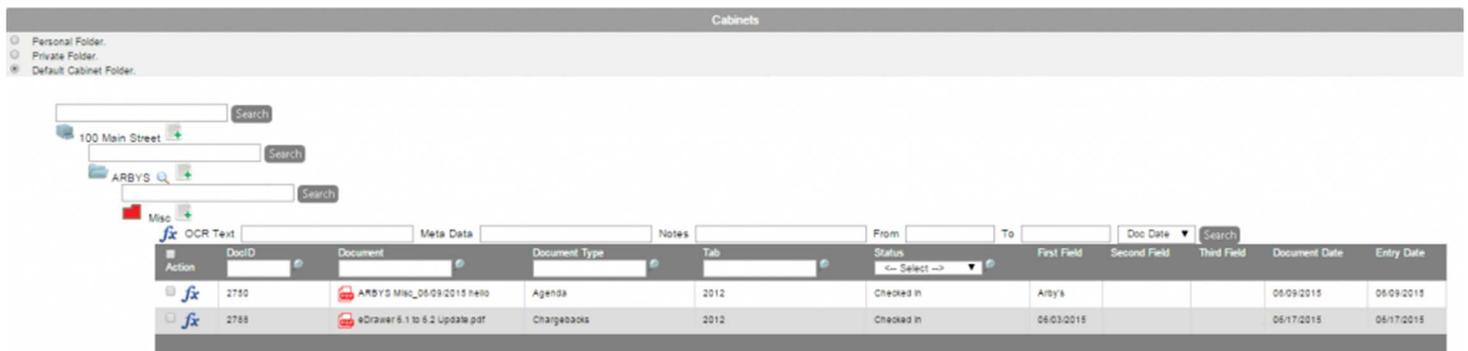


LOCATING DOCUMENTS

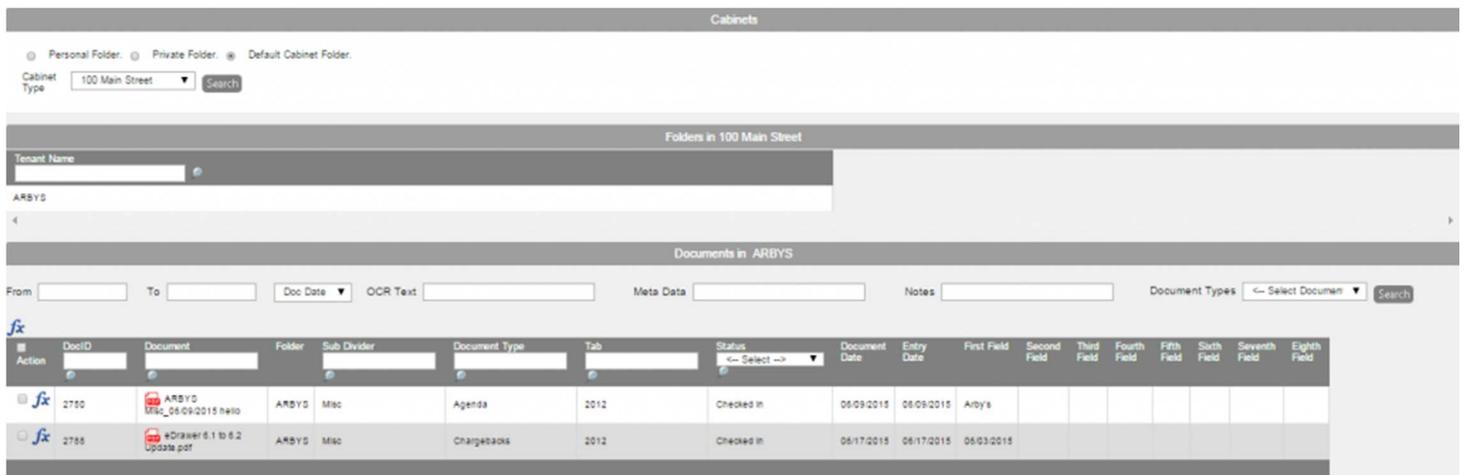
Searching for documents within the system can be accomplished several different ways. Choosing your search method is often a matter of personal preference, or your ultimate goal.

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

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



Another search option, called **Folder Details**, allows you to search on a cabinet and folder. The top level is going to be your cabinets, the middle section will be your folders within that cabinet and the third section will be all documents within that 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 **Document View** is a basic search that will allow you to search on a certain document type, while including a date range (if needed). You will notice similar search options within the document grid to help you narrow down your list of results. Across the board will be your metadata fields you associate with each document type.

Select	Folder	DocID	Vendor ID Number	Vendor Name	Contact Number
		2274	123456		
		2211	123456		
	Home #10	2053	4545	Smith	
	Janeless	1773	123		
	Alvaz, Zozip	1575	909878		
	14-398487	1500	123456		

The **Content search** is your “catch-all” search. The Content Search is a global search and 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 **Metadata Search** 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 (demographic information) that a user entered as part of the document or folder.

The **Folder Drill-Down Search** allows for users to locate individual folders. By typing in any part of the folder name, the system will locate all folders contained in your search. When users search for particular folders, the system will also include the cabinet that particular folder, or folders, belong to.

Folder Drill-Down

System Folder:

Cabinet Type Details

Folder	Cabinet
ABC Inc. LLC	Vendors
ABC Consulting	Consultants
ABC Company	Vendors
abc	Quality Assurance

Fields	Values
Vendor Name	ABC Company
Vendor Contact	
Active?	Yes
Initial Date	
Region	Northeast

DASHBOARD

The Dashboard allows the user to manage his/her recent files, checked-out documents, workflow tasks, messages and notes.

Recent Files: Keeps track of the last 30 days of documents viewed by the user.

In Progress: Shows documents the user currently has checked out from the system.

Workflow: Shows all workflow tasks waiting for the user to complete.

Messages: Displays messages that another user has broadcasted out to all or specific users. Essentially, this section is used as a message board for all users using the system. (**Menu > Admin > Company > Broadcast**)

Notes: “Ticklers” the user sets as reminders. (**Menu > Workflows > Manage Notes**)

Recent Files						
Add Date	DocID	Document Name	Document Type	Cabinet Type	Folder	
05/15/2015	970	0_9402014110200.pdf	Customer Invoices	Customer	Carri Kret	
05/15/2015	281	1_07092013122055.pdf	Medical Certification	Insurance Carriers	Kaiser	
05/15/2015	200	CD_0_07092013122053.pdf	Customer Invoices	Customer	Online Media	
05/17/2015	3176	Service Level Agreement- LSSP Corporation.docx	Customer Invoices	Customer	Acme Cleaning	
05/17/2015	3175	Complete Payroll.xls	Customer Invoices	Customer	Acme Cleaning	
05/17/2015	3174	PinPoint Catalog.docx	Customer Invoices	Customer	Acme Cleaning	
05/17/2015	3173	BrookBridge Inc DOC3173 Statements CB	Customer Contracts	Customer	BrookBridge Inc	

In Progress							Workflow					
Check-Out	DocID	Document Type	Document Name	Cabinet Type	Sub Divider	Folder	Workflow	Task	DocID	Document Name	Start Date	Due Date
05/04/2012	37	Job Tickets	outs.xls	Jobs	Outside Job	100	Customer Statements	Approve and Sign	2547	Carey P Smith DOC2547	05/15/2015	05/19/2015
05/15/2014	33	Job Tickets	CLAM.docx	Employees	Medical Cert	Edwards	Customer Statements	Approve and Sign	2548	1_05192015025913.pdf	05/15/2015	05/19/2015
05/27/2012	25	Medical Certification	eDrawerarchive.JPG	Client	Technology	Adams, Inc.	Customer Statements	Approve and Sign	2549	2_05192015025920.pdf	05/15/2015	05/19/2015
05/03/2015	16	Vendor Invoices	Vendors Vendor INV DOC16	Vendors	Statements	Acme Inc.	Customer Statements	Approve and Sign	2552	2_05192015101239.pdf	05/19/2015	05/20/2015
10/22/2012	10	Vendor Invoices	menu	Vendors	Other	Williams Paint	Customer Statements	Approve and Sign	2553	3_05192015101244.pdf	05/19/2015	05/20/2015
							Customer Statements	Approve and Sign	2555	2_05202015093050.pdf	05/20/2015	05/21/2015
							Customer Statements	Approve and Sign	2565	1_05202015093055.pdf	05/20/2015	05/21/2015
							Customer Statements	Approve and Sign	2571	Carey P Smith DOC2571	05/20/2015	05/21/2015
							Customer Statements	Approve and Sign	2572	2_05202015114946.pdf	05/20/2015	05/21/2015
							Customer Statements	Approve and Sign	2573	3_05202015114951.pdf	05/20/2015	05/21/2015

Messages	Notes

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 (Regular, as shown above, or the Express Dashboard). The icons will bring you to those pre-defined favorite screens, and can be defined from user to user.