

## TREENO ELECTRONIC DOCUMENT MANAGEMENT

**User Guide** 

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## Introduction

Treeno Electronic Document Management (EDM) allows your organization to store its imported documents in one central location while controlling who has access to them. Treeno's highly customizable filing structures make searching for the information you need fast and easy. A wide range of documents and file types are supported, including scanned files, Microsoft® Office® documents, PDFs, emails, faxes, and rich media files such as video and audio files. Treeno's browser-based interface allows you to access information without needing to install anything on your desktop. Now you can get to the exact information you need—precisely when you need it.

Treeno's industry-standard SSL security ensures that all information is encrypted during transmission. This provides the same level of security used by the world's largest banks. Treeno also protects access to your organization's information by employing a comprehensive security model based on user and group permissions. All documents and actions within the system are fully audited.

Treeno EDM offers deployment options to fit the specific needs of organizations across a wide spectrum of industries, including engineering, automotive, insurance, legal, finance, real estate, education, healthcare, manufacturing, and municipality. These deployment options include:

- **Treeno Document Server** The Treeno Document Server is installed on your local server and can run in a multi-tiered environment that supports thousands of users and store billions of documents. So, if your company has its own IT staff, maintains its own servers, and likes the idea of having its data on-site, the Treeno Document Server is right for you.
- Treeno Software-as-a-Service (SaaS) Treeno SaaS offers all the functionality of the Treeno Document Server and is used by some of the largest businesses in the world, including banks and financial services corporations. If you want Treeno to maintain all your organization's backups, upgrades, and other IT needs in a SAS70 Type II-compliant data center, the SaaS offering is a good fit for you.

## **About This Guide**

This guide is intended for individuals who will be using Treeno EDM to perform their daily tasks. It provides information about the following major topics:

- Navigating Treeno EDM
- Working with the Dashboard
- Using the Inbox
- Managing the Document Center
- Annotating Files
- Managing Workflow Tasks
- Using the Treeno Document Binder

## **About Treeno**

Established in 2002 and located in Portsmouth, NH, Treeno Software has grown to become a leader in the Enterprise Document Management (EDM) industry. Treeno Software was the industry's first to embrace cloud computing with the Treeno EDM Cloud (SaaS) and to provide web-based solutions offering secure global mobile access. Treeno Software's mission is to provide our customers with efficient workflow operations and measurable return on investment (ROI) through the use of our secure, reliable, and easy-to-use web based EDM software solution.

# **Navigating Treeno EDM**

This section is designed to familiarize you with the Treeno EDM workspace. It covers the following topics:

- Logging in to Treeno EDM
- Changing your password
- Navigating the Treeno EDM workspace
- Searching for information
- Logging out of Treeno

## Logging in to Treeno EDM

1. Open your browser and enter the address for your Treeno EDM server.

The Treeno start page opens. This page is divided into two panes. The **left pane** displays links to information, such user guides, manuals, articles or to request support. If you are using the in-house Treeno Document Server, this information is configured by your organization. If you are using Treeno SaaS, Treeno customizes the information that is displayed. The **right pane** lets you log in to your Treeno account.

- 2. Enter your username and password.
- 3. Click the Login button.

Note: Contact your IT representative if you do not know your Treeno login credentials.

#### **Changing Your Password**

1. On the Treeno start page, click your username link in the top-right corner.



2. The Treeno Administration page opens. The ability to change your will be

located on the home page

	=			
🗅 Manage Cabinets	(a) My account			
Manage Barcodes <		Username Email Change Password	jessica2 jcharpentier@treenosoftware.com	
	Ŀ≱		Current password New password	
			Re-enter password	
			Change	

- 3. Enter your new password and then confirm this password.
- 4. Click Change.
- 5. To log out of the Admin page, click your username to the upper right-hand side of the page.



## Navigating the Treeno EDM Workspace

The Treeno EDM workspace consists of five tabs, each of which is designed to help you search for, retrieve, process, and annotate files quickly and efficiently. Click a tab to access different Treeno document management tools.

SOFTWARE Dashboard Document Center Inbox Workflow Tasks Search Results	TREENO					_
	SOFTWARE	Dashboard	Document Center	Inbox	Workflow Tasks	Search Results

Cabinet List	
import	(0 Folders 0 Files)
Account Payable	(17 Folders 28 Files)
Employee Record	(3 Folders 4 Files)
Human Resource	(4 Folders 7 Files)
Publishing	(0 Folders 0 Files)
reserved words	(0 Folders 0 Files)
Student Records	(7 Folders 11 Files)

- **Dashboard** Provides you with quick access to your workflow tasks, cabinets, and available database space. Users can configure the layout and content of their own dashboards.
- **Document Center** Displays the folders in a selected cabinet. Using the tools on the Document Center tab, you can upload new files to a folder or a document type within a folder, open and annotate a file, modify a file's index values, print a folder barcode, and process workflow tasks.
- **Inbox** Displays the files in your Treeno inbox as well as additional user inboxes that you have access to. From your inbox, you can index files, which involves selecting the cabinet, folder, and document type where you want to store the file and entering the appropriate index values.
- Workflow Tasks Lists your workflow items that are waiting to be processed. You can open each file and perform the necessary workflow action before routing the file to the next node in the workflow.
- Search Results Displays the folders and files that match your system search.

#### **Accessing Administration**

The Administration area is used to configure Treeno EDM for your organization. Generally, only system and department administrators have access to the Administration tools. Most users only need to access this area to change their password (see page 8).

To access Administration, click the **Administration** link if you have Admin access or your **Username** link, if you do not have Admin access, in the top-right corner of the Treeno EDM window.

#### **Changing Your Department**

If you have access to multiple departments in your organization, the **Department** field at the top of the Treeno EDM window will be displayed as a drop-down list. You can change the department whose cabinets and folders you want to view at any time.



## **Performing System Searches**

You can perform a full-text search across the entire Treeno system. This allows you to quickly find a folder or file in any of the cabinets you have access to. Treeno searches cabinet index fields, document type index fields, and OCR'd text to find the items that match your search criteria. The results of your search are displayed on the Search Results tab. You can then click a folder or file in the search results to go directly to it on the Document Center tab.

You can perform a system search from anywhere within Treeno EDM.

1. In the System Search field, enter all or some of the text you want to find.



#### 2. Click the **Search** Sutton.

The Search Results tab opens and displays the folders and files that begin with or match your search value. The following information is provided for each item:

- **Type** File or Folder
- Last Updated Date and time the item was last modified.
- Cabinet Cabinet where the item is currently located.
- Folder- The folder location and any indexed values associated to the folder.
- Info The type of file. Not applicable to folders.

- Full Text Content The text where your search value was found. For files, this is the OCR'd text. For folders, this is the cabinet index values.
- 3. Click a folder or file to open it on the Document Center tab.

Note: To refresh the cabinet view on the Document Center tab, click the Clear Search button.

#### **Performing Doc Type Searches**

The Doc Type Search function allows for the ability to search for files within all document types that have been indexed within the Treeno system. This search allows for more of a targeted search when looking for a specific file. When performing a search for a document type and an index within the corresponding cabinet, the search results will provide a list of any applicable files. You can then click a file in the search results to go directly to it on the Document Center tab.

An **Export Grid to Excel** option is also provided, allowing you to create a report of all listed files from search results.

1. Click the Doc Type Search link located at the top right-hand side of the page. You will be directed to the Document Type Search page.

Welcome j <u>essica1</u>	Jessica Demo	▼ Logout
System Search		vpe Search

- 2. Click the List of Document Types drop-down, associated index fields will display.
- 3. Select a Document Type.
- 4. If the document type is listed in more than one cabinet, select the appropriate cabinet from the **Filter by Cabinet** drop-down.

<b>TREENO</b>			
S O F T W A R E	Dashboard	Document Center	
Document Type Search			
List of Document Types 🔻	Filter by Cabinet	T	
Search			
Export Grid to Excel			

- 5. To narrow the search, you can add values into the index fields listed.
- 6. Click **Search.** All document type indexes, and a list of associated files will display. Note that the index field allows for additional filtering
- 7. Click the file in the search results. You will be directed to the file within the Document Center tab.
- 8. If needed, click the **Export Grid to Excel** button to export to excel.

## Logging out of Treeno

When you are finished working in Treeno, you should log out of the application. Your organization may have a limited number of licenses, so logging out of the application when you are finished makes that license available for another user.

To end your Treeno EDM session, click the **Logout** link in the top-right corner of the window.



# Working with the Dashboard

The dashboard is your central location for getting quick access to your workflow tasks, cabinets, and available database space. Clicking a cabinet in the Cabinet List, for example, automatically opens that cabinet on the Document Center tab, allowing you to view and work with its folders. Similarly, clicking an item in Workflow Tasks brings you directly to that file so you can perform a workflow-related task that has been assigned to you.

You can configure the layout, columns, and content of your dashboard to meet your individual needs. The settings you choose are automatically saved.

TREENO								🚜 Bi	nder ( <b>0</b> )	Welcome	_	Jessica Den	no		• Logo	
SOFTWARE	Dashboard	Document Center	Inbox	Workflow Tasks	Search Results							Sys	tem Search		rpe Search	
Dashboard Configuration																
Cabinet List					^ X	Workflow	Tasks								^ ×	
import		(0 Folders 0 Files)				Priority	Notor	Date Due	Date	Department	Cabinat	Folder	Tab/Document	Workflow	Nod	
Account Payable		(5 Folders 8 Files)				Fliolity	Notes	Date Due	Notified	Department	cabillet	Folder	Tab/Document	worknow	Nan	
Employee Record		(28 Folders 2 Files)													Senc	
New		(3 Folders 0 Files)				0		8/21/2019	8/21/2019	Jessica Demo	Test	7/16/2019	NA	Change of	canr Resr	
New 2		(3 Folders 0 Files)						0/21/20	-,,	PM	PM	icar.	1110/2015	1.00	DataPath	with
Publishing		(0 Folders 0 Files)													ID	
Student Records		(6 Folders 5 Files)		G					7/11/2010			Jessica				
Test		(3 Folders 1 Files)		Click on the r	ow to open its documents vie	1		7/11/2019	12:48:31	Jessica Demo	TPA	100 Treeno	Authorization	PO	NOE	
TPA Employee		(3 Folders 6 Files)							PM		employee	Softwawre	Physical merapy	Approvai		
TPA Employer		(2 Folders 0 Files)										TRETOU				
Training Docs		(1 Folders 3 Files)						7/40/2040	7/10/2019	Incolar Dense	Employee	Jessica 200		1	Add	
Training GTK		(1 Folders 1 Files)				4	4		7/10/2019	PM	Jessica Demo	Record	2-15-2019	NA	Jess test 1	info .
Vendor Back File		(3 Folders 33 Files)				4						05/18/2019			•	
		Total: (58 Folders 59	Files)													
icense Usage					^ X											
Users Allowed:		5														
Jsers Logged On:		1														
Users Remaining:		4														
treenosupport325																

## **Configuring the Dashboard**

- 1. Click the **Dashboard** tab.
- 2. Click the **Dashboard Configuration** button.

The configuration options are displayed:

Dashboard Configuration			
Select Layout:	Three Column (A)	•	
Select Widget:	Todo List	•	
Select Column:	Column 1	•	Add Widget

- 3. Select the column layout for your dashboard. You can choose to display your content in one, two, three, or four columns.
- 4. Select the content (widget) you want to display in a column.
- 5. Select which column you want the widget to display in. For example, if you selected a three-column layout for your dashboard, you could display your Cabinet List in Column 1.

#### 6. Click Add Widget.

7. Repeat steps 3-6 for each additional widget you want to display.

Widget Type	What does it display?
Available Space	This widget will display in a pie chart the amount of storage space that is allocated
	to your department as well as the amount of space used.
Cabinet List	This widget displays a clickable list of all the cabinets that you have access to. You
	can click anywhere on the line to go directly to the cabinet in the document Center.
	Note if you do not have access to a particular cabinet, then you will not see it listed
	here.
Inbox View	This widget displays the contents of your Treeno inbox. It will show the number of
	Folders and Files as well as the names of the files that are in your inbox. If you
	click on a file name it will bring you to your inbox so you can work with the file.
	The Date field is the date the file was uploaded, The Size field is the size of the file
	in bytes.
Workflow Tasks	The Workflow Task widget displays any workflow tasks that are assigned to you. If
	you click on any of the lines, it will bring you to location of that task so that you can
	process the workflow.
User Open Items	User Open Items shows graphically the number of items in each users inbox.
License Usage	This widget is available to Department Administrators only. It shows the number of
_	concurrent users that are allowed to log into Treeno at the same time, the number
	of users that are logged on, as well as the number of available users. It also
	displays the Treeno usernames of users that are currently logged in. These
	usernames are clickable, if you want to force a user to logout to free a spot for a
	user to login, click the link and it will allow you to log that user off.
Inbox View Workflow Tasks User Open Items License Usage	This widget displays the contents of your Treeno inbox. It will show the number of Folders and Files as well as the names of the files that are in your inbox. If you click on a file name it will bring you to your inbox so you can work with the file. The Date field is the date the file was uploaded, The Size field is the size of the file in bytes. The Workflow Task widget displays any workflow tasks that are assigned to you. you click on any of the lines, it will bring you to location of that task so that you car process the workflow. User Open Items shows graphically the number of items in each users inbox. This widget is available to Department Administrators only. It shows the number of users that are logged on, as well as the number of available users. It also displays the Treeno usernames of users that are currently logged in. These usernames are clickable, if you want to force a user to logout to free a spot for a user to login, click the link and it will allow you to log that user off.

**Note**: The Dashboard Configuration options are no longer displayed once you leave the Dashboard tab. If you later decide to modify your dashboard, simply click the **Dashboard Configuration** button again.

# **Using the Inbox**

Your Treeno inbox contains files that have been assigned to you and are waiting to be added to the Treeno system. Typically, these files originated as paper documents that were scanned and sent directly to your inbox using Treeno File Monitor or Treeno Legacy Integrator. Some of these files may have also been reassigned to you from another user's inbox.

In addition to viewing your own inbox, you can view other user inboxes if the appropriate permissions have been granted to you in Administration.

The Inbox tab in Treeno EDM consists of the following areas:

- Toolbar Provides options for renaming, uploading and deleting inbox folders and files.
- **Top pane** Displays all documents that have been assigned to you.
- Middle pane Provides the Cabinet drop-down. When a cabinet is select, all folders will display below.
- Bottom pane Lets you quickly index selected files into the appropriate document type.
- Right pane Displays or where you can open the selected file.

	Document Center Johov Workflow Ta	ske Search Results				🚜 Binder (0) V	Velcome j <u>essica1</u> Jess	ica Demo 🔹	Logou Search
sica1 🔹 🐼 Upload Move	To	ect View Action 🔻		01101009210269 1 6210	no puro odf	1/1		Ċ	
Name	Date	Files/Size		01101006319506_1_0210_	ρο ραιρ.ραι				
1_6210_PO purp.pdf	1/10/2020 10:08:26 AM	17969							
1_6208_BOL6.pdf	1/10/2020 10:08:26 AM	70855							
1_6181_Invoice 2.pdf	1/10/2020 10:08:26 AM	19719							
				Date	Purchas	e Order			_
				To Name					
				City, ST ZIP Code					
				Ship To					
				Same as recipient					
				Instructions					
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ords to display.					Quantity	Description	Unit Price	Total	
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			Select Workflow						
			File Document				-		1
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						Subto	tai		-
						Sales T	ax		1
						Shipping & Handli	ng		
						Total D	ue		
					-			ue upon receir	a
			<					as apointeool	

## **Inbox Toolbar**

The toolbar on the Inbox tab provides options for managing your inbox folders and uploading files.

Click This	To do This
\$	Refreash the inbox.
Upload	Upload files to inbox.
Move To •	Select another user's inbox within in the department to move document to.
Delete Selected	Delete selected file from inbox.
Rename	Rename selected file from inbox.
Select View Action •	Save the current view or Delete the current view.

#### **Renaming Files**

You can change the name of a file in your inbox.

- 1. Select the file you want to rename.
- 2. Click the Rename button from the Toolbar. A renaming modal window will open.
- 3. Enter the new file name and click **OK**.

#### **Moving Files**

With appropriate permissions, you can move a file from your inbox into another user's inbox, or to the public inbox were another user can view or index the file.

- 1. Select the file from the inbox.
- 2. Click the **Move To** drop down icon in the Toolbar.
- 3. Select a user's inbox from the drop-down.

#### **Deleting Files**

You can delete an inbox file.

- 1. Select the file you want to delete.
- 2. Click the **Delete Selected** button in the Toolbar. A delete confirmation modal window will open.
- 3. Click Yes to confirm the deletion.

## **Uploading Files to an Inbox**

You can upload or add files directly to your inbox view. If you are uploading a file to another user's inbox, that user will see the file when he or she logs in to Treeno and opens the inbox.

1. Select the user's inbox from the inbox drown-down list where you want to upload files.



2. Click the Upload button. The Upload box will display.

📄 Upload		
Source file(s): Submit Upload status:	Select file	

- 3. Click **Select File** to navigate to and select the files you want to upload. You can upload multiple files at one time.
- 4. Click the **Open** button.

A green icon next to the file name indicates when it is ready to be uploaded to Treeno.

5. Click the **Submit** button.

The file is added to the selected location.

## **Indexing Files in the Inbox**

When you index a file in Treeno, you add it to a selected cabinet and enter information from the file in the cabinet's index fields. If a folder doesn't already exist for the file, a new one is created. If a folder does exist and is organized by document type, you must complete two additional steps: (1) select the document type for the file, and (2) populate those index fields using information from the file. Users can then search on the cabinet and document type index values to retrieve the file.

The indexing area is located in the lower half of the Inbox tab.

1. In the Select a Cabinet drop-down list, select the cabinet where you want to add

the file. The cabinet's folders are displayed.

- 2. Do one of the following to add the file to a cabinet folder:
  - <u>To add the file to an existing folder</u>: Click the **Show Search** button.

Show Search	Clear Search	Add Folder
Po Reques	st F	Purchase Order
8878 🞑	g	654
55788	5	5988
44578		

Enter your search criteria to find the folder and click the **¥ Filter Button**. The folders that meet your criteria are displayed in the search results. Click the folder where you want to store the file. For more information on searching in Treeno, see page 24.

**Note**: Click the **Clear Search** button to once again display all the folders in the cabinet and hide the search criteria fields.

 To add the file to a new folder: Click the Add Folder button.

 Account Payable
 Image: Clicar Search Add Folder

 Show Search
 Clear Search Add Folder

 Po Request
 Purchase Order

 1
 8878
 9654

 1
 55788
 55988

 1
 44578
 55988

The Edit Form window opens. Complete the cabinet index fields and click **Insert**. The folder you created is displayed in the folder grid. Click the folder to open it.

•

treenosupport32	25 🔻 🚱 Uploa	Move To	•	Delete Selected	d Rename	Select Vie	ew Action 🔻
O Name		D	ate			Files/Size	
🕑 😭 Treeno S	Software.html	8,	/22/2019 1	1:25:50 AM	3	86057	
Account Payabl Show Search	e ▼ Clear Search	Add Folder	Fit Colum	ns To Screen	e size: 10 💌		1 of 1 <b>1 1</b> to 5 of 5
Po Reque	st	Purchase Order	lı	nvoice Number	Vendo	or Name	Invoice Date
8878		9654	5		Test ve	ndor	8/2/2019
55788		55988	2	4588			8/1/2018
44578				-			•
No Document T	ypes for this Ca	binet ▼ Main					File Document

3. Click the File Document button.

- 4. Do one of the following to add the file to a Document Type:
  - <u>To add the file to an existing document type in the folder</u>: Click the appropriate tab in the folder, and then click the **Add Document** button. The Edit Form window opens. Complete the required index fields for the document type and click **Insert**.



• <u>To add the file to a new document type</u>: In the **Add Document Type** drop-down list, select the document type. The document type is added as a tab in the folder. If the document type has been assigned index fields, the Edit Form window opens.

Complete the required index fields for the document type and click **Update**. If the document type does not use index fields, proceed to step.



- 5. Click Inset. The file is uploaded to Treeno in the cabinet, folder, and document type you specified.
- 6. Repeat steps 1-5 for each additional file you want to process.
- 7. If there are no associated document types for the folder, select the file and then click the **File Document** button.

Note: You can minimize and maximize windowpanes by clicking the arrow and the top of each section.

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# **Managing the Document Center**

Most of your time in Treeno EDM will be spent working with the Document Center tab. This is where you will find a list of cabinet folders and the files and document types that are contained in those folders.

This section covers the following topics:

- Navigating the Document Center tab
- Understanding cabinets, folders, and document types
- Searching within a cabinet
- Customizing your cabinet view
- Working with folders
- Working with files and document types

## **Navigating the Document Center Tab**

When you select a cabinet, its folders are displayed in the upper part of the Document Center tab. Using the Folder Action options, you can create, modify, delete, and export folders. Folders are displayed in a grid format, with each column header representing a cabinet index field. This grid can be customized by displaying or hiding columns as well as sorting and grouping folder data (see page 28).

TREENO / Select a c	abinet from the drop	o-down				
S O F T W A R Dashboard	Document Center	Inbox	Workflow Tasks	Search Results		
Account Payable 🔽 (Standard view)	Save a View M	anage Views	3			
Show Search Clear Search Add Folder	Select a Folder Action	1	<ul> <li>Toggle Coli</li> </ul>	umn Width		
Po Request	Purchase Order		Invoice Nun	ıber	Vendor Name	Invoice Date
Po Request	Purchase Order		Invoice Nun	nber	Vendor Name	Invoice Date

When you select a folder, the bottom half of the Document Center tab displays the folder's files (documents, images, email messages, etc.).

TREENO	)				💰 Binder (0) Welco
S O F T W A R E Dashboard	Document Center Inbox W	/orkflow Tasks Search Results			
Account Payable   (Standard view)	Save a View Manage Views	Tanala Caluma Width			
Show Search Clear Search Add Folder	Select a Folder Action	Toggle Column Width			
Po Request	Purchase Order	Invoice Number	Vendor Name	Invoice Date	Check Number 5
On Hold					
New New					
New New	22544	44588	Smithly	9/8/2019	2555
New, Removed	55887	112	Sporting Outlet	09/03/2019	225
New New	225	7663	ABC Warehouse	09/10/2019	2258
Pending		5584	Sporting Outlet	09/12/2019	
New New	8878	5587	ABC Warehouse	07/15/2018	2254
New New	225	7663	ABC Warehouse	09/10/2019	2258
Pending	15445	225477	ABC Warehouse	11/22/2018	11477
New New	55988	24588	Sporting Outlet	8/1/2018	225
On hold	887	4458	ABC Warehouse	08/15/2019	2258
New, Removed	55887	112	Sporting Outlet	09/03/2019	225
Complete, New	002	002	Sporting outlet	12/1/2018	118
Add Document Type  Balance Sheet  K	Email 🗙 Invoice 🗙 Purchase O	rder Request 🗙 🛛 Receipts 🗙			
Select a File Action V Upload Files Show S	iearch Clear Search Select View A	ction <b>v</b>		F	'age size: All ▼  Page: 1 of 1
File Name	Creation	on Date	Creator	Size	
No records to display.					

Most folders will display a series of tabs across the top, which represent the different types of documents contained in the folder. For example, a folder in an Accounts Payable cabinet might display tabs for the following document types: Invoices, Purchase Orders, Balance Sheets, and Receipts.

	Eac	h Tab represents a diffe	ent document type
Add Do	cument Type 🔻 🛛 Balance Sheet 🗙	Email 🗙 Invoice 🗙	Purchase Order Request 🗙 🛛 Main
Select a	File Action V Upload Files Show	Search Clear Search	Select View Action 🔻
	File Name		Creation Date
	File Name		Creation Date 10/11/2019 9:51:00 AM

To improve your searching capabilities, some document types may have unique index fields assigned to them. These index fields are displayed as column headers below the tabs. When you add a file to a tab, you are prompted to enter values for each of the index fields

**Note**: If a document type has not been assigned unique index fields, the following column headers are displayed by default: File Name, Creation Date, Creator, Size.

# Understanding Cabinets, Folders, and Document Types in Treeno EDM

Cabinets are the basic storage units within Treeno EDM. Cabinets contain folders and files just as they do in the physical world.

Your organization's cabinets have been configured to mirror your current filing practices. For example, your organization might have the following cabinets: Accounts Payable, Accounts Receivable, Human Resources, and Purchase Orders.

**Note**: Cabinet access is permission based on role and/or responsibility within the company. Someone who works in Accounts Payable, for instance, most likely will not have access to a Human Resources cabinet. Your dashboard can be configured (see page 13) to display a list of all the cabinets you have access to.

Each cabinet is identified by a unique set of index fields that describe the information it contains. A Human Resources cabinet, for example, typically contains employee records, so it may have the following index fields: Last name, First name, Date of hire, and Department.

Index fields are displayed as column headers for the cabinet on the Document Center tab (as shown below)

Human Resource  (Standard view) Show Search Clear Search Add Folder	Save a View Manage Views      Select a Folder Action     Select a Folder Action     Toggle Column Width		
Last Name	First Name	Date Of Hire	Department
i Wyman	L	2005-05-08	Administration
Rogers	н	1998-06-05	Records
Jones	E	2008-01-29	Quality Control
Smith	с	2011-02-08	Production

When you created a new folder and complete the index fields, Treeno creates a new folder for documents to be placed and displays it in the cabinet. When you view the cabinet, you can see a list of all the folders it contains. Typically, each folder contains a single file, but you can add an unlimited number of files to the same folder. Doing so, however, decreases your search capabilities since all the files in the folder will be identified by a single set of index fields belonging to that folder. If you find that you need to add several different types of documents to a single folder, you can take advantage of Treeno's document type functionality.



Document Types allows you to organize the documents and make them searchable within the associated folder and within Treeno's Doc Type Search feature. See page 38.

You may have found that using tabs in your physical folders helps you to organize your files more effectively. For example, a Human Resources cabinet contains a separate folder for each employee in the organization. These folders contain different documents related to the employee, such as an application, resume, W-4, I-9, and benefits information, as shown below:

Rather than storing these files at the root level of the employee folder, which may be cumbersome if you have dozens of documents for each employee, you can add tabs to the folder that represent each document type. When you group files according to document type, you provide visual organization to a folder and help other users find the files they need more readily. In the following image of an employee folder, five tabs represent the different document types in the folder: Application, Benefits, I-9, Resume, and W-4.

L	Each tab represents	a different document type
Add Document Type	Application 🗙 🛛 Benefits 🗙	19 🗙 Resume 🗙 W4 🗙
Select a File Action 🔻	Upload Files Show Search Cl	ear Search Select View Action 🔻
	File Name	Creation Date
0	rite Name	Creation Date
	Resume for L_Wyman.pdf	9/13/2019 1:14:52 PM

## Searching within a Cabinet

You can search for folders within a cabinet using the cabinet's index fields as search criteria.

1. Click the Show Search button to display the search fields at the top of the cabinet.

S O F T W A R E Dashboard	Document Center Inbox Workflow Tasks Search Results		🚜 Binder ( <b>0</b> )
J Human Resource 🔻 (Standard view)	Save a View Manage Views		
Show Search Clear Search Add Folder	Select a Folder Action    Toggle Column Width		
Last Name	First Name	Date Of Hire	Department
i Wyman 🔰	L	2005-05-08	Administration
Rogers		4000.05.05	Descada
lingers	Н	1998-06-05	Records
Jones	E	2008-01-29	Quality Control

2. Each search field corresponds with an index field for the cabinet. In one of the search fields, enter all or a part of the value you want to search by.

Image: Sore T W A R E         Deshboard         Document Center         Inbox           Image: Human Resource •         (Standard view) •         Save a View         Manage V           Hide Search         Clear Search         Add Folder         Select a Folder Action	x Workflow Tasks Search Results Tews Toggle Column Width		🦧 Binder (0)
Last Name	First Name	Date Of Hire	Department
	<b>T</b>	T	T
🥎 Wyman	L	2005-05-08	Administration
Rogers	н	1998-06-05	Records
Jones	E	2008-01-29	Quality Control
Smith	C	2011-02-08	Production

Select this operator	To search for
NoFilter	No Filters will be applied when performing a search.
Contains	Folders whose index field contains the value you entered. For example, if you are searching by vendor and you enter "sol", your search results might return Solar Solutions, Dover Solid Waste Management, and Elm Street Gasoline.
DoesNotContain	Folders whose index field does NOT contains the value you entered. For example, if you are searching by vendor and you enter "sol", your search results will NOT return Solar Solutions, Dover
StartsWith	Folders whose index field starts with the value you entered. For example, if you are searching by vendor and you enter "Sol", your search results might return Solar Solutions and Solander Electrical.
EndsWith	Folders whose index fields end with the value you entered. For example, if you are searching by vendor and you enter "field", your search might return Smithfield and Meadowfield.
EqualTo	Folders whose index field contains the exact value you entered. For example, if you are searching by vendor and you enter "Solar Solutions", only those folders with that exact vendor name are displayed.

3. Click the **Filter** T button and select the appropriate filter operator. The following table describes the most commonly used operation.

GreaterThan	Folders whose index field contains a value that is greater than the value you entered. For example, you could search for invoices greater than \$500. If an invoice is exactly \$500, it will not be displayed in the search results, however.
LessThan	Folders whose index field contains a value that is less than the value you entered.
Greater Than or Equal To	Folders whose index field contains a value that is greater than or equal to the value you entered. For example, you could search for invoices that are \$500 or more. In this case, an invoice that is exactly \$500 will be displayed in the search results along with the higher amount invoices.
Less Than or Equal To	Folders whose index field contains a value that is less than or equal to the value you entered.
Between	Folders whose index values are between a range. For example, you could search between the years of
NotBetween	Folders whose index values that are not between a range.
IsBlank	Folders with any index that contains a blank value.
NotIsBlank	Folders with any index that does not contain a blank value.

The folders that match your search criteria are displayed. Click a folder to select it and display its files in the lower pane. You can also click the following buttons (If your permission setup allows):

- Start Workflow Triggers a selected workflow for the folder (see page 74).
- Process Workflow Lets you perform a workflow-related task for the folder (see page 74).
- Edit Lets you change the folder's index values (see page 35).
- **Delete** Deletes the folder from the cabinet.
- 4. To clear the search results and return to the cabinet, click the **Clear Search** button.

5. To hide the search criteria fields, click the **Hide Search** button.

## **Customizing Your Cabinet View**

You can customize your view of a cabinet by doing the following:

- Sorting folders in ascending or descending order
- Displaying and hiding columns
- Toggle Colum Width
- Grouping folders

The column headings that are displayed represent the cabinet's index fields. You can save your configurations using the **Save Folder View** option (see page 30).

#### **Sorting Folders**

You can reorder the folders in a cabinet by sorting columns in ascending or descending order.

 Click the name on a column header. Each click toggles the sort order between ascending and descending order. You can also right-click a column header name and click **Sort Ascending** or **Sort Descending**.

A column that has been sorted is highlighted. An arrow on the column header indicates the direction of the sort. In the following example, the Vendor column has been sorted in descending order (Z to A). Note that the Amount column has not been sorted, so the column header is not highlighted.

Account Payable ▼ (Standard view) ▼ Save a View Manage Views									
Show Search Clear Search Add Folder	Toggle Column Width								
Po Request	Purchase Orde	Invoice Number							
Pending	-	5584							
Complete, New	002	002							
New New	225	7663							
Carl New	225	7663							

2. To return to the default folder display, right-click any column header and click **Clear Sorting**.

J Account Payable ▼ (Standard view) ▼	Save a View Man	nage Views	
Show Search Clear Search Add Folder	Select a Folder Action	▼ Toggle	Column Width
Po Request	Purchase Order	Sort Ascending	umber
🥘 📖 Pending		Sort Descending	
Complete, New	002	Clear Sorting	$\triangleright$
New New	225	Group By Ungroup	
🥘 📗 New	225	Columns +	-
问 📗 On hold	887	Filter 🕨	-
New New	8878	5587	

#### **Displaying and Hiding Columns**

You can customize your cabinet view by displaying and hiding columns. The cabinet's index fields determine which columns are available for you to select from. Several default columns are also available to display or hide:

- DocID Treeno's internal identifier for the folder.
- Location The location of the file on the Treeno server.
- Deleted System variable. Always set to 0.
- TimeStamp The date and time the folder was created.
- RowNumber -Displays the number of the row.
- WorkflowRow Displays or hides the Start/Process Workflow button.
- Edit Displays or hides the Edit link.
- DeleteRow Displays or hides the Delete link.

To display or hide columns

• Right-click a column header, point to **Columns**, and then select the check box next to each column you want to show. To hide a column, clear the check box.

#### **Toggle Column Width**

If the cabinet's index fields extend out beyond the view of the page, you can use the Toggle Column Width feature to format the indexes into a compressed state allowing for you to see more index fields on the view page.

#### **Before clicking Toggle Column Width**

Account Payable    (Standard vi	iew) 🔻 Save a View Manage V	/iews						
Show Search Clear Search Add F	older Select a Folder Action	<ul> <li>Toggle Column Width</li> </ul>				Page size	: 50 V H I Page: 1 of 1 H H	ems 1 to 11 of 11
Po Request	Purchase Order	Invoice Number	Vendor Name	Invoice Date	Check Number	Status	Publish	
Pending		5584	Sporting Outlet	09/12/2019		Closed	Start Workflow	Edit Delete
Complete, New	002	002	Sporting outlet	12/1/2018	118			Edit Delete
Canal New New	225	7663	ABC Warehouse	09/10/2019	2258	ongoing	Start Workflow	Edit Delete
New New	225	7663	ABC Warehouse	09/10/2019	2258	New	Start Workflow	Edit Delete
Cn hold	887	4458	ABC Warehouse	08/15/2019	2258		0	Edit Delete
New New	8878	5587	ABC Warehouse	07/15/2018	2254	Pending	Start Workflow	Edit Delete
Pending	15445	225477	ABC Warehouse	11/22/2018	11477	New	Start Workflow	Edit Delete

#### After clicking Toggle Column Width

J	Account Payable 🔻 (Stand	ard view) 🔻 Save a Vie	w Manage Views												
Sho	w Search Clear Search	Add Folder Select a Fold	er Action 🔹	Toggle Column Width							Page size: 50 *	N Page: 1	of 1 🕨 🕅	Items 1 to 11	of 11
	Po Request	Purchase Order	Invoice Number	Vendor Name	Invoice Date	Check Number	Status	Publish							
	Pending		5584	Sporting Outlet	09/12/2019		Closed		Start Workflow	Edit Delete					
	Complete, New	002	002	Sporting outlet	12/1/2018	118				Edit Delete					
	New	225	7663	ABC Warehouse	09/10/2019	2258	ongoing		Start Workflow	Edit Delete					
	New	225	7663	ABC Warehouse	09/10/2019	2258	New		Start Workflow	Edit Delete					
	On hold	887	4458	ABC Warehouse	08/15/2019	2258				Edit Delete					
	New	8878	5587	ABC Warehouse	07/15/2018	2254	Pending		Start Workflow	Edit Delete					
	Pending	15445	225477	ABC Warehouse	11/22/2018	11477	New		Start Workflow	Edit Delete					

#### **Grouping Folders**

You can organize the folders in a cabinet by grouping them together by column. In an Accounts Payable cabinet, for example, you could group folders by vendor name. The name of the column you are grouping by is displayed at the top of the folder list. Each group of folders is then displayed in alphabetical order. In the following image, you can see folder groups for ABC Warehouse and Sporting Outlet.

You can also nest groups to further customize your view of the data. In the Accounts Payable cabinet, for example, you could group folders by vendor and then by amount within each vendor:

#### To group folders

1. Right-click the column header you want to use for organizing your folders, and then click Group By.

The folders are grouped by the column header you right-click.

Account Payable  (Standard Show Search Clear Search Add	view)  View Save a View Manage V Solder Select a Folder Action	/iews Toggle Column Width				Page
Po Request	Purchase Order	Invoice Number	Vendor Name	Internation Base	Check Number	Status
Pending		5584	Sporting Outlet	Sort Ascending Sort Descending		Closed
Complete, New	002	002	Sporting outlet	Clear Sorting	118	
🥘       New	225	7663	ABC Warehouse	Group By	2258	ongoing
🥘       New	225	7663	ABC Warehouse	Ungroup	2258	New
Cn hold	887	4458	ABC Warehouse	Filter	2258	
🥘       New	8878	5587	ABC Warehouse	07/15/2018	2254	Pending

2. To expand or collapse a grouped row, click the greater than arrow or drop-down arrow to the left of the row.

Account Payable  (Sta Show Search Clear Search	andard view)  Save a View Manage View Add Folder Select a Folder Action	Toggle Column Width				Page siz
> Po Request	Purchase Order	Invoice Number	Vendor Name	Invoice Date	Check Number	Status
> invoice number: 002						
invoice number: 112						
Wall New, Removed	55887	112	Sporting Outlet	09/03/2019	225	
New, Removed	55887	112	Sporting Outlet	09/03/2019	225	Pending
> invoice number: 225477						
> invoice number: 24588						
> invoice number: 4458						

3. To create nested groups, right-click another column header and click Group By again.

Account Payable • (Standard view)	ew) 🔻 Save a View Ma	nage Views						
Show Search Clear Search Add Folder Select a Folder Action • Toggle Column Width Pa								
> Po Request	Purchase Orde	Sort Ascending	: Number	Vendor Name	Invoice Date	Check Number	Status	
> invoice number: 002		Sort Descending						
<ul> <li>invoice number: 112</li> </ul>		Clear Sorting						
i New, Removed	55887	Group By	$\supset$	Sporting Outlet	09/03/2019	225		
New, Removed	55887	Ungroup		Sporting Outlet	09/03/2019	225	Pending	
> invoice number: 225477		Columns 🕨						
> invoice number: 24588		Filter >						
> invoice number: 4458			]					
> invoice number: 44588								
> invoice number: 5584								
> invoice number: 5587								
> invoice number: 7663								

4. To remove a grouping, right-click a column header in the group and click **Ungroup**.

_								
	Account Payable 🔻 (Standard v	iew) ▼ Save a View Ma	anage Views					
Show Search Clear Search Add Folder Select a Folder Action   Toggle Column Width								P
>	Po Request	Purchase Orde	Sort Assonding	Number	Vendor Name	Invoice Date	Check Number	Status
>	invoice number: 002		Sort Ascending					
~	invoice number: 112		Sort Descending					
	New, Removed	55887	Clear Sorting Group By		Sporting Outlet	09/03/2019	225	
	New, Removed	55887	Ungroup	$\triangleright$	Sporting Outlet	09/03/2019	225	Pending
>	invoice number: 225477		Columns 🕨					
>	invoice number: 24588		Filter b					
>	invoice number: 4458			]				
>	invoice number: 44588							
>	invoice number: 5584							
>	invoice number: 5587							
>	invoice number: 7663							

#### **Saving Your Folder View**

After you have customized your folder view by sorting, grouping, and selecting which columns to display, you can save your changes. The next time you log in to Treeno and open the Document Center tab, your customizations will be maintained.

1. To save a folder view, click the **Save a View** button.

TREENO							
SOFTWARE	Dashboard	Document Ce	nter Inbox	Wor	kflow Tasks	Search Results	
J	▼ (Sta	indard view) 🔻	Save a View	Manage	e Views		
Show Search Clear Search	Add Folder	Select a Folde	r Action	•	Toggle Colu	umn Width	
Description							

2. A Save View modal window will open. The text field is defaulted to New view (number) and the field is editable to change the save view title.

📰 Save View		×
Save the current view as:		
New view 1		
	Save	Cancel

3. Click Save to save changed.

Save View	×
Save the current view as	:
2018 View ]	
	Save Cancel

- 4. Click Cancel to close the modal window with no saved changes.
- 5. You will see that within the **Save Folder View** drop-down, the created saved view title has been applied.

	Dashboard	Document Center	Inbox	Workf	low Tasks	Search Results	
J	• 201	8 View 🔨 Save	e a View	Manage \	∕iews		
Show Search Clear Search	Add Fc (Sta	ndard view) Kr Action 8 View	ı	•	Toggle Colu	ımn Width	
Description							

Continue to add the folder views as needed. The views will continue to be added to the **Save Folder View** drop-down.

To access any of the saved folder views, click the **Save Folder View** drop-down and select the appropriate option.

	Dashboard	Document Center	Inbox	Workflow Tasks	Search Results	
J Chandler Tests	▼ Ven	dor Party Plus View 🔻	Save a Vie	w Manage View	VS	
Show Search Clear Search	Add Fc (Sta	ndard view) 8 View	5	<ul> <li>Toggle Colu</li> </ul>	mn Width	
Description	201 Clie	9 View nt Smith View				
Virtual Viewer upgrade	project fi Clie	nt Jones View				
VV Enosis Test	Ven	dor Party Plus View				
Signix test transactions						
Carl Treeno Viewer test doc	uments					

The Manage Views button allows for a saved folder view to be renamed or deleted.

1. To access, click the Manage Views button.

A Manage Views modal window will open with a list of saved folder views.

Manage Views		×
View	Options	
2018 View	Rename	Delete
2019 View	Rename	Delete
Client Smith View	Rename	Delete
Client Jones View	Rename	Delete
2017 View	Rename	Delete
Vendor Party Plus View	Rename	Delete

- To rename an existing save view name, click **Rename**.
   A **Rename View** modal window will open. The name field is editable, allowing the user to change the save folder view name.
- 3. Click **Rename** to change the saved view name.

4. Click Cancel to close the modal window with no saved changes.

Vier	_		
	Rename View		×
2018	Change the view's name to:		
2019			
01100	Client Smithly View		
Clien			
Clien		Repame	Cancel
2017			

5. To delete a saved view, from the Manage Views modal window, click **Delete**.

View	Ontions	
	options	
2018 View	Rename	Delete
2019 View	Rename	Delete
Client Smith View	Rename	Delete
Client Jones View	Rename	Delete
2017 View	Rename	Delete
Vendor Party Plus View	Rename	Delete

- 6. A warning message will appear. If you wish to delete the saved view, click **OK**.
- 7. Click **Cancel** to close the warning message with no saved changes.

## **Working with Folders**

The upper part of the Document Center tab displays the folders that are stored in a selected cabinet. Several options are available to help you manage these folders. In addition to opening a folder and viewing its content, you can create new folders, edit folder index values, delete folders, and export folders.

For information on assigning folders to workflows, see "Managing Workflow Tasks" on page 67.

### **Opening Folders**

When you select a cabinet, its folders are displayed in the upper area of the Document Center tab. Click a folder to open it and view its files. If the number of folders exceeds your current page size, use the arrow buttons to move through the additional pages. You can also adjust the page size to display more or fewer folders at one time.

By default, folders are displayed 50 per a page. You can manage how many folders you wish to see per a page and navigate through the folder pages by the following:


### **Creating New Folders**

Each time you scan or upload a file into Treeno, you must select the folder where you want to store the file. If a folder doesn't already exist, you can create a new one and enter its cabinet specific index values. Users can then search on those values to later locate the folder and retrieve its files.

1. Select the cabinet where you want to create a new folder.

🗐 Accounts Payable 🔹		Select a cabinet to open.
Show Search Clear Search A	dd Fo	lder
	L	Click to create a new folder in the cabinet.

2. Click the Add Folder button.

The Edit Form window opens.

		×
Edit Form		
last_name:		
first_name:		
date_of_hire:	<b>III</b>	
department:		
		Insert

3. Enter values for the folder's index fields and click Insert.

The folder is displayed at the top of the list in the cabinet.

### **Editing Folder Index Values**

You can change the values that have been entered into a folder's index fields. Users can then search for and retrieve the folder using the new index values.

- 1. Select the cabinet that contains the folder you want to edit.
- 2. Next to the appropriate folder, click the Edit link.

The Edit Form window opens.

- 3. Modify the folder's index values, as needed.
- 4. Click Update.

### **Deleting Folders**

With the appropriate permissions, you can delete a folder from a cabinet.

Caution! When you delete a folder, you are also deleting all the files it contains.

- 1. Click the **Delete** link next to the folder you want to delete.
- 2. Click **OK** to confirm the deletion.

### **Folders Actions**

The Select Folder Action drop-down list contains additional actions to be performed on a folder within Treeno. Below is guide to these actions and their function.

Folder Action	Function
Export to Excel	Creates an excel document that will include a list of all folders for selected cabinet and the corresponding index values.
Export Folder Data	Downloads a zip file of the folder selected and adds to your Treeno inbox. The zip file can be locally extracted and opened containing all folder information and files within the folder.
Publish Selected	With the appropriate permissions, users can manually publish the entire folder to the publishing portal.
Duplicate Folder Indices	Will create a duplicate folder with all associated and completed indices. Note: when Edit Form open, please be sure to check the" Allow creation of duplicate folder" checkbox.
Duplicate Folder Indices, Files and Tabs	Will create a duplicate folder with all associated and completed indices, files and document types. Note: when Edit Form open, please be sure to check the" Allow creation of duplicate folder" checkbox.
Print Barcode	Will open a modal window allowing you to print the barcode for the selected folder.

## **Working with Files and Document Types**

Treeno supports all file types, though you will probably most often work with TIF and PDF files. When you open a folder in a cabinet, the lower part of the Document Center tab displays the files that are stored in that folder. If the folder is empty, you can add new files to it. You can also organize the files in a folder by adding document type tabs with their own unique index fields. Document types enable you to find a specific file more quickly, especially when you have many versions of the same document (for example, as an insurance policy is amended, each iteration of the document can be easily located and retrieved).

In addition to viewing the files in a folder, you can download, move, copy, version, and print barcodes for files. Using the Virtual Viewer, you can also annotate files.

### **Viewing Files**

When you select a cabinet and click a folder, the files that are stored in that folder are displayed in the lower part of the Document Center tab, as shown below:



Most folders contain tabs that organize the files into different document types. These tabs are displayed across the top of the viewing area. Click a tab to view the files it contains.



If a document type has its own index fields, specific data has been entered for each of the files that have been added to that document type.

To view a file, click the arrow to the left of the index values that describe the file you are looking for. The row expands and displays the name of the uploaded file:

Ad	d Docu	iment Type 🔻	Application 🗙	Benefits 🗙	19 🗙 Resun	ne 🗙 🛛 W4 🗙
Ac	dd Doc	ument Show	Search Clear	Search		
		Effective Date			Plan Typ	e
9/12/2019				Health		
	Select	a File Action 🔻	Upload Files	Show Search	Clear Search	Select View Action 🔻
	0		File Name			
		🖆 🗎 🔒 🛛	2019 Heath Ins	urance Electives.p	df	

After you find the file you want to work with, you can do the following:

- Point to the file to view its thumbnail in the preview pane on the right.
- Click the file to annotate it in the Virtual Viewer (see page 55).
- Select the check box to the left of the file and select a file action from the drop-down list (see the following sections).

### Adding Document Type Tabs

Your Treeno administrator defines the document type(s) that are available to add to a folder.

Note: By default, all folders have a default tab called Main.

- 1. In the **Add Document Type** drop-down list, select the document type you want to add.
- 2. If the document type you selected has been configured with index fields, The Edit Form window opens and displays the index fields that must be completed.
- 3. Enter or select the appropriate index values and click **Update**.

Add Document Type •	Main	
Add Document Type	Jpload Files Show Search Clear Search	h Select View Action 🔻
Benefits	File Name	Creation Date
19		
Resume		
Resume W4		

### **Removing Document Type Tabs**

If you have the required permissions, you can remove a document type tab from a folder. The document type is not deleted from the system; it remains available to add back to the current folder or to other folders in the cabinet. **Removing the Document Type Tab deletes all the files in that folder that are associated with the Document Type Tab**. If a red "X" is not displayed on a tab, you do not have permission to remove document types from a folder.

1. Click the red "X" on the tab.

(				
Application 🗙	Benefits 🗙	I-9 🗙	Resume 🗙	W-4 🗙

2. Click Yes to confirm the deletion.

### **Uploading Files**

Files can be uploaded to Treeno from a local or network drive. There are two ways to upload files, depending on whether the document type has been assigned unique index fields.

Note: You can also add files to Treeno by printing a barcode and scanning the files to that location.

### Adding Files to a Document Type without Index Fields

- 1. Click the document type tab where you want to add a file.
- 2. Click the Upload Files button.



The Upload window opens.

🗐 Upload	S	-	a	x
Source file(s):				
Select file				
Submit				

- 3. Click the Select File button.
- 4. Navigate to and select the files you want to upload. You can upload multiple files at one time.
- 5. Click the **Open** button.

A green icon next to the file name indicates when it is ready to be uploaded to Treeno.

6. Click Submit.

The file is displayed on the document type tab.

### Adding Files to a Document Type with Index Fields

- 1. Click the document type tab where you want to add a file.
- 2. Click the Add Document button.

Add Document T	ype 🔻	Applicat	tion 🗙	Resume 🗙	W4 🗙
Add Document	Show	Search	Clear	Search	

The Edit Form window opens and displays the index fields that must be completed for the document type.

3. Enter or select the appropriate values and click **Update**.

			×
Edit Form			
Effective Date:	9/12/2019		
Plan Type:	Dental	•	
Allow crea	tion of duplicate folder.	Update	Cancel

A row is created for the file you are about to add. The row displays the index values you entered.

Add Document Type  Application  X	Benefits 🗙 Resume 🗙 W4 🗙		
Add Document Show Search Clear Se	arch	Page size: All V I Page: 1 of 1 H Items 1 to 1 of 1	
Effective Date	Plan Type	Creation Date	
> 9/12/2019	Dental	10/11/2019 2:29:19 PM	Start Workflow Edit Delete

- 4. Click the arrow to the left of the row to expand it.
- 5. Click the Upload Files button.

Add Document Type  Application  Add Document Show Search Clear	Benefits X Resume X W4 X		Page size: All V N A Page: 1 of 1 N Items 1 to 1 of 1
Effective Date	Plan Type	Creation Date	
9/12/2019	Dental	10/11/2019 2:29:19 PM	Start Workflow Edit Delete
Select a File Action V Upload Files	Show Search Clear Search Select View Action •		Page size: All V Page: 1 of 1 🕨
File Name	Creator	Creation Date	Size
No child records to display.			

The Upload window opens.

- 6. Navigate to and select the file you want to upload. You can upload multiple files at one time.
- 7. Click the **Open** button.

A green icon next to the file name indicates when it is ready to be uploaded to Treeno.

8. Click Submit.

The file is displayed under the row you selected.

Ad	dd Document Type  Application	🗙 Benefits 🗙 Resume 🗙 W4 🗙			
A	dd Document Show Search Cl	ear Search		Page size: All 👻 🚺 🖣 Pi	age: 1 of 1 🕨 🕨 Items 1 to 1 of 1
	Effective Date	Plan Type	Creation Date		
~	9/12/2019	Dental	10/11/2019 2:29:19 PM	Start Workflow	v <u>Edit Delete</u>
	Select a File Action V Upload File	Show Search Clear Search Select View A	ction •	Page si	ize: All 👻 💽 Page: 1 of 1 🕨
	- File Name		Creator	Creation Date	Size
	🗆 🖉 👘 🖺 🗟 📢 2019 Heath	n Insurance Electives.pdf	treenosupport325	10/11/2019 2:32:50 PM	39 KB

## **Select A File Action**

The Select A File Action drop-down provides a list of functions that can be performed on a file within Treeno. The drop-down is located on the bottom half of the Document Center page where files are displayed. Most File Actions are permissioned based by your Treeno Administrator.

Account Payable	e 🔻 (Standard view)	Save a View Manage Views										
Show Search Clea	Add Folder	Select a Folder Action	Toggle Column Wie	dth					Page size:	<u>50</u> ¥ P	Page: 1 of 1	Items 1 to 16 of 1
Reference	Number Vendor	Number Vendor Name	Purchase Order Number	Invoice Date	Amount	Screen	Invoice Description	Approver	Status	Publish		WF Status
877588	0640	FGH Company	877444	11/20/2019	875.22		Hardware	Lisa	Approved		Start Workflow	
a7788 📖 🖏	0621	ABC Company	7887	11/05/2019	500.25		Test	Jessica	Pending			IN PROGRESS
2254	800	Smithly Warehouse	8778	01/27/2019	988.22	YU33	Cleaning Items	Gil	Completed			IN PROGRESS
iiiii 544755	0622	ABC Corp	25544	09/01/2019	250.00	YK33		Jessica	Paid			IN PROGRESS
28877	0642	XYZ Company	558777	08/06/2019	8544.20	YM33		Gil	Paid		Start Workflow	
5887777	0641	Treeno Software	87788	05/06/2019	985.00		Software upgrade	Fred	Paid		Start Workflow	
877889	0640	FGH Company	87788	10/27/2019	654.25	YU33	New Sink	Gil	Paid			IN PROGRESS
🍋 IIII	0623	ASD Company										IN PROGRESS
	0622	XYZ Company										IN PROGRESS
🦳 I IIII	0621	ABC Company										IN PROGRESS
25544	0619	Treeno Software	887777	10/30/2019	100.00	YH77	Server migration	Fred	On Hold			IN PROGRESS
🥘 📖 8778	0619	Treeno Software	19665	11/06/2019	600.00	YU22	Upgrade	Fred	Pending		Start Workflow	
ali 500114	500	Sporting Outlet	09/12/2019	09/30/2019	600.00	Y22	Gloves	Jessica	Complete		Start Workflow	
												Þ
Add Document Type	Main								10000 10000			Invoice
Select a File Action   Select a File Action	Upload Files Show	Search Clear Search Select View	v Action 🔻				Page size: All 👻	Page: 1 of 1	Company Name	Code		BANKS S 100) BANKS S 1000
Show OCR	File Name	Crea	ntor		Creation Date		Size		Transf Tig Contrast Farme Sortening Roma Strate Soldering			
Download -	invoice.pat	treer	nosupporto20		11/21/2019 9:51:46 AW		09.65		Cantorer 10 Hz.	.09	Paraterit Resea	101 8477
createZip									6/11		and the second	LOBS TOTAL
Move Copy												
Delete												
Print Barcode												
File History											OWYER MARY T	n.
Rename											107	~
Add Note									Restative property for	realized, and part to the sound	Water seried before: there the any conditions party	
Dilinei									The annual life graduities, eights	and select a		
										TILLE VE	a row room associated	

### **Printing Barcodes**

You can print a barcode to a folder or document type in Treeno. You must have access to the barcode destination and have rights to printing barcodes. Treeno File Monitor uses this printed barcode to direct TIFF and PDF files to the appropriate location in Treeno. Before scanning a batch of documents, you must first scan the barcode sheet to associate the documents with the barcoded location. The File Monitor then uploads the scanned documents directly to that location.

**Note**: You can also upload files from a local or network drive (see page 39). For more information about Treeno File Monitor, refer to the Treeno File Monitor Installation and Configuration Guide.

- 1. Select the cabinet and folder where you want to store scanned documents.
- 2. Click the appropriate document type tab.
- 3. Do one of the following:
  - For document types without index fields: Click the drop-down for the Select a File Action list, select Print Barcode.
  - <u>For document types with index fields</u>: Expand the row whose index values correspond with a document you are scanning. Click the drop-down for the **Select a File Action** list, select **Print Barcode**.

**Note**: See "Adding Files to a Document Type with Index Fields" on page 40 to learn now to create a new row for a document that you are adding to Treeno.

4. Click the Print button. A barcode is printed for the selected location.

### **Modifying Document Type Index Values**

You can change the index values for a file that you have already added to a document type.

- 1. Navigate to the file by selecting the appropriate cabinet, folder, and document type tab.
- 2. In the file's designated row, click the Edit button. The Edit Form window opens.
- 3. Modify the index values, as needed.
- 4. Click Update. The Edit form window closes, and the row displays the new index values for the file.

### **Deleting Files**

Deleted files are permanently removed from Treeno. You must have the appropriate permissions to delete files.

#### **Deleting Files without Document Type Index Values**

- 1. Select the check box next to each file you want to delete. You can select multiple files.
- 2. Click the drop-down for the **Select a File Action** list, select **Delete**. A delete warning modal will open.
- 3. Click **OK** to confirm the deletion.

#### **Deleting Files with Document Type Index Values**

- 1. Click the appropriate document type tab.
- 2. In the file's designated row, click the **Delete** link. A delete warning modal will open.
- 3. Click **OK** to confirm the deletion.

### **Downloading Files**

You can download a selected file in a cabinet to any location on your local or network drive. Any changes you make to the downloaded file are not tracked. To track file modifications, use the Version option (see page 49).

- 1. Select the check box next to the file you want to download.
- 2. Click the drop-down for the Select a File Action list, select Download.
- 3. Choose to open the file or save it to a designated location.

## **Creating PDF and ZIP Files**

Selected files can be exported in PDF or ZIP format. When you choose multiple files for export a single PDF or ZIP file is created that contains all the selected files.

- 1. Select the check box next to each file you want to save in PDF or ZIP format.
- 2. Click the drop-down for the Select a File Action list, select Create PDF or Create Zip.
- 3. Choose to open the PDF or ZIP file or save it to a designated location.

## **Moving Files**

If necessary, you can move selected files to a different folder within the same cabinet or to another cabinet altogether.

- 1. Select the check box next to each file you want to move.
- 2. Click the drop-down for the Select a File Action list, select Move. The Move Files window

opens.

Marcine Provide Torm       Partonic Provide Number       Partonic Number       Partonic Number       Partonic Number       Partonic Number       Partonic Number       State       State	∞ – □ ×									
J Account Payable	•									
Show Search Clear S	Search Add Fold	ler						Page size: 50 💌	H A Page: 1 of 1	, items 1to 11of 11
Po Request		Purchase Or	ler lı	voice Number	Vendor Name	Invoice Date	Check Nu	mber	Status	
i New		22544	4	588	Smithly	9/8/2019	2555		New	Edit 🏛
New, Removed		55887	1	2	Sporting Outlet	09/03/2019	225		Pending	Edit
New New		225	7	i63	ABC Warehouse	09/10/2019	2258		ongoing	Edit
Pending			5	84	Sporting Outlet	09/12/2019			Closed	Edit
New New		8878	5	87	ABC Warehouse	07/15/2018	2254		Pending	Edit
New New		225	7	i63	ABC Warehouse	09/10/2019	2258		New	Edit
Pending		15445	2	5477	ABC Warehouse	11/22/2018	11477		New	Edit
New New		55988	2	588	Sporting Outlet	8/1/2018	225		Closed	Edit
On hold		887	4	158	ABC Warehouse	08/15/2019	2258			Edit
										•
Add Document Type 🔻	Balance Sheet	Email In	voice Purchase Order Requi	st Receipts						Move Files
Add Document Show	Search Clear Se	earch					Page size: 10	▼ H A Page 1	of 1 , items 1to 1of 1	
Date Of Submission					Creation Date					
5/25/2019					10/11/2019 9:50:25 AM				Edit	
										-

- 3. In the cabinet drop-down list, select the cabinet where you want to move the files.
- 4. Do one of the following to select a folder for the files:
  - <u>To add the files to an existing folder in the cabinet</u>: Click the **Show Search** button.



Enter your search criteria to find the folder and click the **Filter**  $\forall$  button. The folders that meet your criteria are displayed in the search results. Click the folder where you want to move the files. For more information on searching in a cabinet, see page 24.

E Move Files								
Account Payable 🔻								
Hide Search Clear Search Add	Folder							
Po Request	Purchase Order	Invoice Number	Vendor Name					
T		T	T					
🖄 New	22544	44588	Smithly					
New, Removed	55887	112	Sporting Outlet					
New New	225	7663	ABC Warehouse					

5. Select folder.

**Note**: Click the **Clear Search** button to once again display all the folders in the cabinet and hide the search criteria fields.

• To create a new folder for the files: Click the Add Folder button.

Move Files		
J Account Payable 🔻		
Hide Search Clear Search	Add Folder	

The Edit Form window opens. Complete the cabinet index fields and click **Insert**. The folder you created is displayed at the top of the folder grid. Click the folder to open it.

C	Move Files					
	🔰 Account Payable 🔻					
	Hide Search Clear Search Add Folder					
	Po Request	Purchase Order	Invoice Number	Vendor Name	Invoice Date	Check Number
ľ	T	T	T	T	T	
	i New	225544	12554	Rivers Trucking	10/15/2019	
	🥘 New	22544	44588	Smithly Click the folder you	9/8/2019	2555
	New, Removed	55887	112	Sporting Outlet added to open	09/03/2019	225

- 6. Do one of the following to select a document type for the files:
  - <u>To add the files to an existing document type in the folder</u>: Click the appropriate tab in the folder, and then click the **Add Document** button.



The Edit Form window opens. Complete the required index fields for the document type and click **Insert**.

• <u>To add the files to a new document type</u>: In the **Add Document Type** drop-down list, select the document type.

The document type is added as a tab in the folder. If the document type has been assigned index fields, the Edit Form window opens. Complete the required index fields for the document type and click **Update**. If the document type does not use index fields, proceed to step 6.

7. Click the Move Files button.

The files are moved to the cabinet, folder, and document type you specified.

### **Copying Files**

You can copy selected files to another folder or cabinet.

- 1. Select the check box next to each file you want to move.
- 2. Click the drop-down for the Select a File Action list, select Copy. The Copy Files window opens.

Copy Files									ť	9 – O X
Account Payable	arab Add Ealdar						Dae			
Reference Number	Vendor Number	Vendor Name	Purchase Order Number	Invoice Date	Amount	Screen	Invoice Description	Annrover	Page: Of I P H,     Status	items ito roor ro
877588	0640	FGH Company	877444	11/20/2019	875.22	Server	Hardware	Lisa	Approved	Edit ^
87788	0621	ABC Company	7887	11/05/2019	500.25		Test	Jessica	Pending	Edit
12254	800	Smithly Warehouse	8778	01/27/2019	988.22	YU33	Cleaning Items	Gil	Completed	Edit
544755	0622	ABC Corp	25544	09/01/2019	250.00	YK33		Jessica	Paid	Edit
28877	0642	XYZ Company	558777	08/06/2019	8544.20	YM33		Gil	Paid	Edit
5887777	0641	Treeno Software	87788	05/06/2019	985.00		Software upgrade	Fred	Paid	Edit
877889	0640	FGH Company	87788	10/27/2019	654.25	YU33	New Sink	Gil	Paid	Edit
<u> </u>	0623	ASD Company								Edit
<u> </u>	0622	XYZ Company								Edit
					÷					
Add Document Type •	Main									Copy Files

- 3. In the cabinet drop-down list, select the cabinet where you want to copy the files.
- 4. Do one of the following to select a folder for the files:
  - To copy the files to an existing folder in the cabinet: Click the Show Search button.

Copy Files		
Account Pa	yable 🔻	
Show Search	Clear Search	Add Folder

Enter your search criteria to find the folder and click the **Filter**  $\Upsilon$  button. The folders that meet your criteria are displayed in the search results. Click the folder where you want to copy the files. For more information on searching in a cabinet, see page 24.

E Copy Files	Copy Files								
Account Payable 🔻									
Hide Search Clear Search Add Folder									
Reference Number	Vendor Number	Vendor Name 🔺		Purchase Order Number	Invoice Date	Amount			
T	T	<b>T</b>		T	T	T			
87788	0621	ABC Company		7887	11/05/2019	500.25			
	0621	ABC Company							

**Note**: Click the **Clear Search** button to once again display all the folders in the cabinet and hide the search criteria fields.

• <u>To copy the files to a new folder</u>: Click the **Add Folder** button.

E Copy Files							
J Account Payable 🔻							
Show Search Clear Search Add Fo	lder						

The Edit Form window opens. Complete the cabinet index fields and click **Insert**. The folder you created is displayed at the top of the folder grid. Click the folder to open it.

Copy Files				
Account Payable	r			
Show Search Clear	Search Add Folder			
Reference Number	Vendor Number	Vendor Name	Purchase Order Number	r Inv
877588	0640	FGH Company	877444	11/
37788 🔪	0621	ABC Company	7887	11/
12254 Click the f	older 800	Smithly Warehouse	8778	01/
544755	0622	ABC Corp	25544	09/
28877	0642	XYZ Company	558777	08/

- 5. Do one of the following to copy the files to a document type:
  - <u>To copy the files to an existing document type in the folder</u>: Click the appropriate tab in the folder, and then click the **Add Document** button.

Add Document Ty	/pe 🔻	Ba	lance Sheet
Add Document	Show Sea	arch	Clear Searc
Date Of Submiss	ion		
10/15/2019			

The Edit Form window opens. Complete the required index fields for the document type and click **Insert**.

• <u>To copy the files to a new document type</u>: In the **Add Document Type** drop-down list, select the document type.

The document type is added as a tab in the folder. If the document type has been assigned index fields, the Edit Form window opens. Complete the required index fields for the document type and click **Update**. If the document type does not use index fields, proceed to step 6.

6. Click the Copy Files button.

The files are copied to the cabinet, folder, and document type you specified.

### **Viewing the Workflow History**

If a file has been assigned to a workflow, you can view a history of the actions taken on that file using the Workflow History option. To learn more about workflows in Treeno, see page 67.

- 1. Select the check box next to the file whose workflow history you want to view.
- 2. Click the drop-down for the Select a File Action list, select Workflow History.

The Workflow History window opens and displays the name of the user who processed the file, Workflow step, the date it was processed, the action that was taken, and any notes entered by the user.

3. When you are finished reviewing the history, click the close control (X) to close the window.

### Viewing the OCR Layer

If your Treeno system has been configured with the optical character recognition (OCR) module, the text in your scanned documents has been translated into a searchable electronic format. This means that you can find a document in Treeno by entering key words or phrases that exist in the document as your search criteria. Occasionally, the text in a scanned document is obscured, making it difficult for the OCR engine to "read" and correctly translate the content. If you suspect this has occurred, you can view a document's OCR layer from the Document Center tab.

- 1. Select the check box next to the file whose OCR layer you want to view.
- 2. Click the drop-down for the **Select a File Action** list, select **Show OCR**. The OCR window opens and displays the OCR content.
- 3. When you are finished viewing the content, click the close control (X) to close the window.

### Versioning

Treeno's version control feature helps manage the changes made to documents by multiple users. In order to make changes to a document, a user must first check it out of the Treeno repository. After modifying the document in its native application (Word, Excel, Acrobat, etc.), the user then checks it back in to Treeno. Each time a document is checked in, Treeno creates a new version of that document so you can track the changes that were made. At any time, you can retrieve an earlier version of the document, enabling you to reverse any unwanted changes and control the document content.

### **Checking Out a Document**

A document can be checked out by only one user at a time.

**Note**: With the appropriate permissions, you can freeze a file so that it can no longer be checked out (see page 51). A frozen file is read only.

- 1. Select the check box next to the document you want to check out.
- 2. Click the drop-down for the Select a File Action list, select Version.

The Versioning window opens and displays a list of all the versions that have been created for the document. Each new version is marked with a sequential version number, with version 1 representing the original document.

📑 Versíoníng	9				a	×
File: Applicatio	n_Page_02.tif					-
Check Out	Freeze File	Check In	Cancel Check Out			
Open	Delete	Version	Username	Date Checked-In	Notes	
Open	Delete	2	admin	1/30/2012 1:28:04 PM	<u>Notes</u>	
<u>Open</u>	Delete	1	admin	1/7/2012 1:19:13 PM	<u>Notes</u>	Ξ
						-

3. Click the Check Out button.

Note: If the button is grayed out, another user has already checked out the document.

4. Choose to open the document or save it in a designated location.

**Note:** If you check out a document in error or if you don't want to save the changes you made, you can click the **Cancel Check Out** button. The document is automatically checked back in to Treeno and a new version is not created.

#### Checking in a Document

After you have made changes to a document, you can check it back in to Treeno. A new version of the document is saved and marked with a sequential version number.

- 1. Select the check box next to the document you want to check in.
- 2. Click the drop-down for the Select a File Action list, select Version. The Versioning window opens.
- 3. Click the **Check In** button.
- 4. Click the Browse button to navigate to and select the updated document.
- 5. Click **Open** to return to the Versioning window.
- 6. Click OK.

A new version of the document is created and assigned the next sequential version number.

7. Click the **Notes** link to detail the changes you made to the document. Other users can then click this link when viewing a previous version of the document.

### **Freezing Files**

With the appropriate permissions, you can freeze a file so that it can no longer be checked out and modified. Only previous versions of the document can be viewed.

- 1. Select the check box next to the document you want to check in.
- 2. Click the drop-down for the Select a File Action list, select Version. The Versioning window opens.
- 3. Click the Freeze File button.

The Check Out button is grayed out, preventing users from modifying the document. No additional revisions will be made until the file is unfrozen.

4. To unfreeze the file, click the **Unfreeze File** button.

The Check Out button becomes available again.

#### **Opening a Previous Version**

You can open and view a previous version of a document. Any changes you make to the document are not saved. To save your changes and create a new version of the document, you must use the Check Out command (see page 45).

- 1. Select the check box next to the appropriate document.
- 2. Click the drop-down for the **Select a File Action** list, select **Version**.

The Versioning window opens and displays a list of versions that have been created for the document.

- 3. Click the **Open** link next to the version you want to view. If users have entered notes about the changes they made to the document, you can click the **Notes** link to help you determine which version to open.
- 4. Choose to open the document or save it in a designated location.

#### **Deleting a Previous Version**

If a version of a document should no longer be maintained in your Treeno repository, you can delete it. Only users with the appropriate permissions can delete document versions.

- 1. Select the check box next to the appropriate document.
- 2. Click the drop-down for the Select a File Action list, select Version. The Versioning window opens.
- 3. Click the **Delete** link next to the version you want to remove. You are not prompted to confirm the deletion.

## **Viewing File History**

The View File History feature allows you to view the historic events of the file. The window displays the file name, action, a time stamp, notes and username.

- 1. Select the check box next to the file whose history you want to view.
- 2. Click the drop-down for the Select a File Action list, select File History. The File History window

opens and displays historical content.

📄 File Histo	ry			×
Filename	Action	Action_time	Note	Username
Invoice 1.pdf	Downloaded	10/25/2019 10:57:36 AM		treenosupport325
Invoice 1.pdf	Viewed	10/25/2019 10:57:21 AM	File viewed via Thumbnailer.ashx.	treenosupport325
Invoice 1.pdf	Applied Annotation	10/25/2019 10:57:16 AM		treenosupport325
Invoice 1.pdf	Created	10/25/2019 10:57:16 AM	File versioned from parent : Invoice 1.pdf with ID 44	treenosupport325
Invoice 1.pdf	Viewed	10/25/2019 10:57:04 AM		treenosupport325
Invoice 1.pdf	Viewed	10/25/2019 10:56:31 AM	File viewed via Thumbnailer.ashx.	treenosupport325
Invoice 1.pdf	Created	10/25/2019 10:56:28 AM		treenosupport325

3. When you are finished viewing the content, click the close control (X) to close the window.

### **Renaming Files**

This function allows you to rename a file that has already been added into Treeno.

- 1. Select the check box next to the file you want to rename.
- 2. Click the drop-down for the Select a File Action list, select Rename. The Rename File window.
- 3. Enter a new file name.



4. Click the Ok button to save the change.

### Adding a Note

Add Note feature allows you to add a note to the file. The note will appear as an icon within the file tool icons. Once applied, any user can click the Notes icon to view the notes added.

- 1. Select the check box next to the file you would like to add a note to.
- 2. Click the drop-down for the Select a File Action list, select Add Note.

The Add Notes window will Open.

Add Note	Þ	S	-	×
Submit				
Item No records to display.				

- 3. Add Notes in the text field.
- 4. Click Submit
- 5. A Note icon will be added to the file's tools.

Ad	d Docu	ment Ty	/pe	• Invo	ice 🗙			
A	dd Docu	Iment	Show	Search	Clear	Search		
_		Invoice	e Numb	er				In
~		5545						9/
	Select	a File A	ction 🔻	Upload	Files	Show S	earch	Cle
		_		File Na	ame			-
		<b>)</b> [	🗎 🔒 🛛	Invoice	1.pdf			
	Ad Ac	Add Docu Add Docu Select	Add Document Ty Add Document Invoice Select a File Ad	Add Document Type       Add Document     Show       Invoice Numb       5545       Select a File Action       Image: Select a File Action	Add Document Type  Invoice Number  Add Document Show Search  Invoice Number  S545 Select a File Action  Upload  File Na  Noice Invoice	Add Document Type  Invoice × Add Document Show Search Clear Invoice Number  5545 Select a File Action  Upload Files File Name Invoice 1.pdf	Add Document Type  Invoice × Add Document Show Search Clear Search Invoice Number 5545 Select a File Action  Upload Files Show S File Name Invoice 1.pdf	Add Document Type  Invoice  Add Document Show Search Clear Search Invoice Number  5545 Select a File Action  Upload Files Show Search File Name Invoice 1.pdf

6. To view the notes, click the Notes Icon. The Notes will be viewable in the **Item** field.

📄 Add Note		Þ	9	-	×
	Submit				
_	Submit				
	ltem				
	Created 10/25/2019 11:45:10 AM by treenosupport325 : Please review				
-					

7. To close the window, click the X.

### Binder

The Binder function allows you to gather one or more documents to be added to the Binder. For more information of the Binder Feature, see page 77.

- 1. Select the check box next to the file you would like to add to the Binder. **NOTE**: you can select more than one document.
- 2. Click the drop-down for the Select a File Action list select Binder.

Each document that is selected will be denoted in the Binder Link.

TREENO						Binder (2)
SOFTWARE	Dashboard	Document Center	Inbox	Workflow Tasks	Search Results	

# **Annotating Files**

Using the Treeno Virtual Viewer, which has been integrated into your Treeno EDM product, you can leverage the power of annotation in your uploaded files. Several tools are available that allow you to manipulate files in order to maintain document confidentiality, meet compliance regulations, and enhance business processes. Any modifications you make to a file are managed in an annotation layer so that the original file content remains unaltered and securely archived in your Treeno repository. All users can annotate a file; however, you must have permission to save your changes.

Virtual Viewer supports many file types, including Word, Excel, PDF, AFP, and TIFF. The tool's annotation capabilities allow you to rubber stamp, highlight, sticky note, and redact your files. Redaction allows you to protect private information, such as social security numbers and credit card numbers, by hiding that content in the file. Only users with the appropriate permissions will be allowed to view the information.

You can access the Treeno Viewer from the Document Center tab or the Inbox tab in

Treeno..

## **Annotation Tools**

Tool Button	Tool Name	Description
8	Save Document	Saves your modifications to the file while preserving the original content.
	Export Document	Saves a file in PDF or TIFF format or maintains the format of the original file. Annotations can be included.
	Print	Provided the ability to print your document for Treeno Viewer.
€	Zoom In	Increases the magnification of the entire image in the viewer.
୍	Zoom Out	Decreases the magnification of the entire image in the viewer.
Q	Rubberband Zoom	Increases the magnification of a selected area in an image.
	Fit to Window	Resizes the image to fill the entire viewer window.
	Fit to Height	Resizes the image to fit the height of the viewer.
	Fit to Width	Resize the image to fit the width of the viewer.

The following tools are provided to help you annotate your files:

M	Go to First Page	Displays the first page of a multi-page file.
4	Go to Previous Page	Displays the previously viewed page in a multi-page file.
×	Go to Next Page	Displays the next page in a multi-page file.
ы	Go to Last Page	Displays the last page of a multi-page file.
C	Rotate Right	Rotates the image 90 degrees to the right.
3	Rotate Left	Rotates the image 90 degrees to the left.
- <b>`</b> .	Picture Controls	Can adjust brightness, contrast and Gamma.
Ļ.	Сгор	Can crop a section of the page
0	Image Info	Provided Document & Page Properties
/ 🌢	Lines and Shapes	Each tool lets you draw that line or shape in the image. Filled shapes can be used to hide confidential information.
<u>/</u>	Highlight Rectangle	Draws a transparent rectangle in the image for highlighting purposes.
1	Redaction Area	Used for the redaction of text within the document.
note	Sticky Note	Adds a "sticky note" to the image where you can enter additional information. The note text can be searched on.
Т	Text Edit	Allows for insert text in the image.
<u></u>	Rubber Stamp	Allows the ability to apply preset text values on the file in a stamp format. The values include, Approved, Confidential, Denied, Initial Here, Pending, Received and Sign Here.
/	Arrow	Apply an arrow to highlight a location on the page.
L	Freehand	Can write freehand on the file.
	Filled Rectangle/Ellipse	Can block out sections of text within the document. User has options for block color.
	Rectangle/Ellipse	Allows for the ability to outline text or an image within the document.
NBC	Watermark	Can be used to apply a Watermark to the document.

## **Opening Files**

You can open files in the Treeno Viewer from the Document Center tab or the Inbox tab.

### **Document Center Tab**

- 1. Navigate to the file you want to open by selecting the appropriate cabinet and folder.
- 2. In the folder view (lower half of the Document Center tab), click the file to display it in the Treeno Viewer.
- 3. Within the tool's icons for the file, click the View/Annotate icon.

Ad	d Document T	уре	Invo	oice 🗙	Main
A	dd Document	Show	Search	Clear	Search
_	Invoic	e Numb	er		
~	5545				
	Select a File A	ction 🔻	Upload	Files	Show Sea
			File N	ame	
	00	📄 🔒 V	<sup>2</sup> Invoice	a 1.pdf	
		view	/ annotate		

Note: You may need to navigate to the document type in the folder to find the file.

## **Saving and Closing Files**

When you are finished annotating a file, you can save your changes by clicking the **Save Document** button in the Treeno Viewer toolbar.

All users can annotate a file, but you must have the appropriate permissions to save your changes. Please contact your Treeno administrator for assistance.

**Note**: Don't worry about overwriting the original content of a file with your changes. Because Treeno Viewer manages file modifications in an annotation layer, the original file remains unaltered.

You can then close the Treeno Viewer by clicking the **Close** button in the top-left corner of the viewer window.



### **Exporting Files**

You can export a file before or after you have annotated it. Files can be exported in PDF, TIFF, or their original format.

1. Click the **Export Document** button on the toolbar.

The Select Output Format window opens.

- 2. Select page ranges if applicable.
- 3. Select PDF, TIFF, or Original.
- 4. Select or clear **Include Annotations**. When this check box is cleared, all redaction is lifted from the document and it is exported in its original format. You must have the appropriate redaction permissions to clear this check box.
- 5. Select applicable redaction checkboxes.
- 6. Click the **Export** button.
- 7. Open or save the file in the appropriate location, as needed.

### **Printing Files**

1. Click the **Print Document** button.

The Printing Options window opens.

- 2. Select Print within Destination.
- 3. Select page ranges if applicable.
- 4. Select or clear **Include Annotations**. When this check box is cleared, all redaction is lifted from the document and it is printed in its original format. You must have the appropriate redaction permissions to clear this check box.
- 5. Select applicable redaction checkboxes.
- 6. Select Document Note if applicable.
- 7. Click Print.

The file is sent to your default printer.

### **Zooming In and Out**

You can increase or decrease the magnification of an image using the Zoom buttons.

- 1. Click one of the following buttons:
  - **Zoom In** to increase the magnification level of the entire image. Continue clicking the button until you reach the desired magnification level.
  - **Zoom Out** to decrease the magnification level of the entire image. Continue clicking the button until you reach the desired magnification level.
  - **Rubberband Zoom** to magnify a selected area of the image.
  - **Magnifier** K to open a magnifying window which can be dragged on the page to magnify sections at a time.

### Resizing an Image in the Viewer

Using the Fit tools, you can adjust the size of an image so that it fits the height or width of the Virtual Viewer window. This helps you quickly zoom in or out of the image you are working with.

- Fit to Window . Displays the entire image in the viewer.
- Fit to Height i Resizes the image to the height of the viewer.
- Fit to Width <sup>•••</sup> Resizes the image to the width of the viewer.

### **Viewing Multi-Page Files**

Some of the files you work with may consist of multiple pages. You can scroll through these pages in the Virtual Viewer by clicking the following buttons:

- Go to First Page M- Moves to the first page in the file.
- Go to Previous Page 4- Moves back to the previous page in the file.
- Go to Next Page Moves to the next page in the file.
- Go to Last Page >- Moves to the last page in the file.

### **Rotating Images**

You can change the orientation of an image by rotating it 90 degrees to the right or left.

- 1. Click one of the following buttons:
  - Rotate Right Cto rotate the image 90 degrees to the right.
  - Rotate Left Dto rotate the image 90 degrees to the left.
- 2. Continue clicking the button until you reach the desired orientation.

### **Picture Controls**

Click the Picture Control button to open the Picture Control window. Move the Brightness, Contrast of Gamma sliders to change the display of the document.

### Image Info

Click the Image Info 
button to open the Document & Page Properties. This window provides document and page information such as size and format.

## **Lines and Shapes**

The Treeno Viewer toolbar includes several tools for adding lines and shapes to the document you are working with.



Filled shapes can be used to redact, or hide, confidential information in a document, such as a social security number or credit card number. When the document is moved through a Treeno workflow, the information remains secure and can only be viewed by users with the appropriate permissions.

## **Drawing Lines and Shapes**

- 1. Click the appropriate button on the Treeno Viewer toolbar.
- 2. Click and drag in the image to draw the line or shape.
- 3. To modify the attributes of the line or shape (color, fill, width, text etc.), right click the object.
- 4. Use the Annotation Properties window to make your changes.
- 5. When you are finished, click the **Save Document** button.
- 6. Click the Close button to close Treeno Viewer.

### **Highlighted Rectangles**

A highlighted rectangle draws attention to a selected area in a document without obscuring the text beneath it.



- 1. Click the **Highlight Rectangle** <u>A</u>button on the Virtual Viewer toolbar.
- 2. Left click and drag in the image to draw the rectangle.
- 3. To change the color of the highlighted area, right-click the object and select the highlighter color of your choosing.
- 4. When you are finished, click the **Save Document** 💾 button.
- 5. Click the **Close** button to close Treeno Viewer.

### **Sticky Notes**

You can add a "sticky note" to an image that provides additional information you want other users to know about when they are working with the file.

Invoice	
	Sticky Note 🖉
Street Address City, ST ZIP Code Phone Enter phone   Fax E Email   Website	Ente

- 1. Click the **Sticky Note** button on the Treeno Viewer toolbar.
- 2. Left click and drag in the image to draw the sticky note.
- 3. To modify the attributes of the line or shape (color, fill, width, text etc.), right click the object.

- To add text:
  - Right-click the object and click within the **Edit Text** field. Enter the text you want to display in the note and click Save.

Edit Text	
Save Cancel Font color: 000000	
Font: Arial v	Font Size:
Bold	Italic

- 4. When you are finished, click the **Save Document b**utton.
- 5. Click the **Close** button to close Treeno Viewer.

### Text

The Text Edit annotation allows you to added text to the document that is either predefined or scripted by the user.

- 1. Click the **Text Edit** button on the Treeno Viewer toolbar and select one of the following: **New Text Annotation, Approved, Paid, Denied, Copy, Accrual, Consignee, BW, Checkbox.** 
  - New Text Annotation will allow for the ability to add your own scripted text.
  - Approved, Paid, Denied, Copy, and Accrual are predefined text.
  - Consignee will apply the following predefined text: "See Attached Shipping Document for Consignee Signature".
  - **BW** will apply the following predefined text: BW (date).
  - Checkbox will apply a checkbox
- 2. Left click and drag the mouse out anywhere on the document to apply the stamp text.
- 3. To modify the attributes of the line or shape (color, fill, width, text etc.), right click the object.

- To add text:
  - Right-click the sticky note and click within the **Edit Text** field. Enter the text you want to display in the note and click Save.

Edit Text	
	10
Save Cancel	
000000	
Font:	Font Size:
Arial 🔻	14 🔻
Bold	Italic
- of	Ī

- 4. When you are finished, click the **Save Document b**utton.
- 5. Click the Close button to close Treeno Viewer.

### **Rubber Stamps**

A rubber stamp annotation displays text intended to look as if it were stamped on the image.

- 1. Click the **Image Rubber Stamp** button on the Treeno Viewer toolbar and select one of the following: **Approved**, **Confidential**, **Denied**, **Initial Here**, **Pending**, **Received** and **Sign Here**.
- 2. Left click anywhere on the document to apply the stamp text.
- 3. When you are finished, click the **Save Document** button.
- 4. Click the Close button to close Treeno Viewer.

### **Deleting Annotations**

You can remove an annotation that you added to a file. Annotations added by other users are view only to you unless you have the required redaction permissions. Please contact your Treeno administrator for assistance.

1. Right-click the annotation in the image and click **Delete icon** 



2. Click **Delete** to confirm the deletion.

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# **Managing Workflow Tasks**

## What is a workflow?

A workflow defines the steps needed to perform a routine procedure. Depending on the size of your organization and the business processes that are already in place, you may require several different workflows to manage your documents. The following are example workflow scenarios.

### Scenario 1: Employee Handbook Update

A company updates its employee handbook to reflect recent policy changes. The handbook is sent to everyone in the company with a request to review the material and accept or reject the changes. When an employee accepts the handbook, the document is sent to a human resources coordinator who then files it in the employee's folder. If the handbook is rejected, it is routed to the human resources manager for review.

### **Scenario 2: Insurance Policy Application**

A small business owner submits an online application for a liability insurance policy. An agent receives the application and reviews its content to determine if the applicant is eligible for insurance based on the rules for issuing policies. If the applicant does not meet the criteria, the application is rejected, and a denial e-mail is sent. If the applicant meets the eligibility requirements, the agent requests the applicant's credit history from an outside source. If the credit score is within an acceptable range, the applicant is immediately issued a policy. If the credit score is considered high risk, the application is routed to a manager for approval. The manager then approves or rejects the application and the business owner is notified accordingly.

## **Treeno's Automated Workflow Functionality**

Many organizations experience challenges in the current workflow processes. Misplaced paperwork, unnecessary bottlenecks, and an excess of paper shuffling result in significant lost time and money. With Treeno, however, you can automate each step in your organization's current workflows, ensuring that documents remain in a secure, central repository and providing an audit trail to monitor each document's progress through a workflow.

### **Workflow Components**

A Treeno workflow consists of several different components:

- States
- Nodes
- E-mail notifications

Workflow tasks

### **Nodes**

A Treeno workflow defines the steps required to perform a particular business process in your organization. Each of these steps, called *nodes*, describes a part of your logical document flow process. For example, you might have a node called Indexing, another called Manager Approval, and another called Accounts Payable.

When a Workflow Task has been assigned to you, you are alerted via an e-mail notification. You can also view your Workflow Tasks tab at any time to see which tasks are waiting in your queue.

The following types of nodes are available when you process a Workflow Task through a workflow in Treeno:

### Signature

A Signature node requires you to accept or reject the workflow task. Accepting a workflow task is synonymous with signing off on it. The workflow task is then pushed to the next node in the workflow. Rejecting a workflow task routes, it to an error handling node where the problem is addressed or to a final node. You can enter a note explaining why the workflow task was rejected. This note is maintained within the workflow history.

Proce	ess Workflo	w % -	
<b>*</b>	Accept	t) Reject	
User	Date	Notes	Action
User admin	Date 2/1/2012 8:23:43 PM	Notes	Action accepted
User admin admin	Date 2/1/2012 8:23:43 PM 2/1/2012 8:31:59 PM	Notes	Action accepted accepted

### Value

A value node allows you to select where the workflow task should be routed based on a predefined list of options. When you select an option and click Accept, the workflow task is routed to the appropriate node. For example, a user at a value node can route an invoice to one of four managers for approval where each manager is represented by a separate signature node.

Process Workflo	w s – a x
¥ 🗈 🕰	
Approved	
Select Value	Select where to rcute the document next.
💿 🛛 Sandy B.	
User Date	Notes Action
admin 2/1/2012 8:44:38 PM	accepted
#### **Upload File**

An upload file node prompts you to upload or scan a document (for example, a packing slip) that is needed to complete the workflow.

Process Workflow	N S	-	a	X
Uplo	oad a file			
Destination Cabinet: H Destination Folder ID: Destination Tab: Main Space Availability: Yes UploadFiles Setting: Ei	IR 1 nabled			
	Bro	wse		
Save				.
🔏 🖻 🖺				11
Accept	Reject	)		
User Date	No	tes	Action	n
admin 2/1/2012 8 PM	:44:38		accep	ted

Once the document has been uploaded, you can accept or reject it and route the document accordingly.

#### Indexing

An indexing node prompts you to enter metadata, or index values, for a workflow task. When you open the document from the Workflow Tasks tab or an e-mail notification, the indexing viewer is displayed. After the index values have been entered, you can accept or reject the workflow task, and it is routed to the next node in the workflow.

### **E-mail Notifications**

If e-mail notification has been configured for a node, an e-mail message is automatically sent to all users assigned to the node, alerting them that a workflow task is waiting to be processed. After those users have processed the workflow task, it moves to the next node in the workflow and the next group of users is notified via e-mail.

An e-mail notification can also be sent to the workflow owner each time the workflow task is routed to a new node.

Each e-mail contains a link to the document. If the recipient is logged in to Treeno, clicking the link will take them directly to the workflow task. Otherwise, the recipient will be required to log in to the system before viewing the document.

This document has reached the following state in department: Main Department in cabinet: Human
From: "workflow@treenosoftware.com" <workflow@treenosoftware.com> Add to Contacts</workflow@treenosoftware.com>
<u>http://iocainost/energie/energie.pnp/department=client_lies&amp;cab=Human_Resources&amp;doc_ld=1&amp;iiieiD=3&amp;iink=1&amp;wi=1</u>

### Workflow Tasks

Each user has a list of workflow tasks, which is accessed by clicking the Workflow Tasks tab in Treeno EDM.

The Workflow Tasks tab displays all the tasks that are in your queue waiting to be processed. As a workflow moves to a node that is assigned to you, the task is added to your tasks list. Clicking an item in the list brings you to that folder or document on the Document Center tab. Once you process the task and it moves to the next node in the workflow, the document is removed from your task list and appears as a workflow item for the user at the next node.

									Welca	me admin Main Depa	rtment 💌	Looput Administ	tration
		Dachboard	Document Center	Inlease	Workflow Tacke	Search Recultz					System Search	Q,	
Users	TaDo List:	Garrent User	*							Reessign to: Select a	i Dar	▼ Delete Selec	cted
Togg	le Search	Class Saarch							Dage close	5 🐨 😽 4 Day	par 1 - tif I 🔹	M liters 1 to	767
U	Printily (0.5)	Notes	Da	de Due - 1	Date Notified	Department	Cabinet	Folder	Lab/Document	Workflow	Node Name	Node Type	-
	0		1/	11/2012 1	1/11/2012 5-29:53 PM	Main Department	Accounts Fayable	10750 4700 Western Gas & Electric 829.52		DO WORK	NODE2	SIGNATURE	Edit
	0		1/	16/2012 :	1/16/2012 961-22 AM	Main Department	Accounts Fayable	175067LK 178419 Ideal Industries 1739.04		Simple workflow	NODE2	SIGNATURE	Edit
	0		17	26/2012	1/26/2012 5:45:10 PM	Main Department	Accounts Payable	10760-4693 Solar Solutions 5200.00		DO WORK	NODE2	SIGNATURE	Enlit
	0		1/	90/2012 1	1/80/2012 10:54:25 AM	Main Department	Accounts Fayable	35003 9544 Dover Hotel & Suites 289.00		DO WORK	NODE2	SIGNATURE	Edit
	0		2/	1/2012 2	2/1/2012 8:31:59 PM	Main Department	HR	Miner Samuel 2011-09-26 Operations		DO WORK	NODE2	SIGNATURE	Edit
	<u>م</u>	-	2	1/2012 1	2/1/2012 8:44:38 PM	Main Department	HR	Pescock Francis 2010-01-08 Furchasing	and the second	Review	NODEL	INDEXING	Edit

Area	Description
Users To Do List	Lets you view the task lists belonging to other users. You must have the appropriate permissions.
Reassign To	Lets you reassign a selected task to another user.
Delete Selected	Removes a task from your queue without processing it.
Toggle Search	Displays search fields for filtering your tasks list. Click again to hide the fields.
Clear Search	Clears the filtered list of workflow tasks.
Page Size	The total number of workflow items on the current page. If the number of tasks in your queue exceeds the selected page size, you can scroll through the additional pages using the arrow buttons.

The following table describes the primary areas of the Workflow Tasks tab:

Area	Description
Priority	User-defined setting for the workflow task. By default, Priority is set to 0 (High). Items in the list are ordered by priority in ascending order, so any items assigned a lower priority (such as 1 or 2) will display lower down in the list. To set the priority for a task, click the <b>Edit</b> link.
	A document's priority is visible only to the user who set it and does not follow the document to the next node in the workflow.
Notes	Add notes to a workflow task by clicking the <b>Edit</b> link.
	Notes are visible only to the user who created them and do not follow the document to the next node in the workflow.
Due Date	Click the <b>Edit</b> link to select a due date for the workflow task.
	Due dates are visible only to the user who created them and do not follow the document to the next node in the workflow.
Date Notified	The date the document entered your task queue.
Department	The department
Cabinet	The cabinet where the document is stored.
Folder	The folder where the document is stored, as indicated by the values that have been entered for the folder's index fields.
Tab/Document	The document type tab where the document is stored, as indicated by the values that have been entered for the document type's index fields.
Workflow	The workflow where the document is being processed.
Node Name	The node that has been assigned to you for processing the document.
Node Type	The type of action required to process the document.
Edit	Opens the Edit Details for Workflow window where you can set the task priority and due date and enter any notes.

## **Filtering Workflow Tasks**

- 1. Click the **Toggle Search** button to display the search fields at the top of the task list.
- 2. Enter all or a part of the value you want to search by.
- 3. Click the **Filter T** button and select the appropriate filter operator. For information about commonly used operators, see page 26.

The tasks that match your search criteria are displayed.

- 4. To clear the search results and return to the all tasks in your queue, click the Clear Search button.
- 5. To hide the search criteria fields, click the **Toggle Search** button again.

## **Reassigning Workflow Tasks**

The **Reassign To** drop-down list allows you to reassign workflow items from your tasks list to another user's tasks list.

Reassign to:	Select a User	*
--------------	---------------	---

Only users with the appropriate permissions can reassign workflow tasks. The list of available users in the Reassign To field will vary depending on your rights. If you do not have permission to reassign workflow tasks, only your name will be displayed in the Reassign To list.

## **Editing Task Details**

Using the Edit Details for Workflow window, you can edit the following information for a workflow task:

- **Priority** A user-defined setting for the workflow task. By default, the priority is set to 0 (High). Tasks in the list are ordered by priority in ascending order, so any tasks assigned a lower priority (such as 1 or 2) will display lower down in the list.
- Notes Additional information about the task.
- Due date The date when the task should be completed.

A task's priority, notes, and due date are visible only to you and do not follow the document to the next node in the workflow.

1. Click the Edit link to the right of the task whose details you want to edit.

The Edit Details for Workflow window opens.

Edit Deta	Edit Details For Workflow With ID 258					
Edit details for workflow with ID 258						
ID:	258					
Priority (0-5) :	0					
Notes:	This is a note.					
Date Due	1/16/2012					
Update	Cancel					

- 2. Enter the task priority and note details.
- 3. In the **Due Date** field, click the calendar icon to select the date or enter the date manually.

4. Click the **Update** button.

## **Deleting Workflow Tasks**

You can delete your own workflow tasks. Only your Treeno administrator can delete workflow tasks from other users' tasks lists.

- 1. Select the check box to the left of each task you want to delete.
- 2. Click the **Delete Selected** button in the top-right corner of the Workflow Tasks tab. You are <u>not</u> prompted to confirm the deletion.



## **Processing a Workflow Task**

When a workflow task has been assigned to you, it is displayed on the Workflow Tasks tab. You must process the task as directed in order for it to continue to the next user in the workflow.

1. On the **Workflow Tasks** tab, click the task you want to process. The type of action that is required is indicated by the Node Type column.

The Document Center tab opens and displays the location of the selected document (either in a folder or a document type).

								Welcome admin [Main Department *] Loss
	Daktinearð	Toxument Center	J.ripov	Workthow ) asks	Search Results	}		System Search 🧏
🗿 (нк	-							
Show Search Clear S	earch Add Folds	er Select a Folder Actio	on 🍬					Page size: 10 •
Last Name		First	t Name		Da	te Of Hire	Department	
🧃 Mirer		Sam	uel		20	11-09-26	Operations	Process Workflow

#### Workflow task for a folder

/\dd	Docu	iment Tj	vpe 🔫	Lindorsement 🗙 Medical Bill 🗙 Signed Forms 🗙				. í
٨e	ld Do	cument				Page ciza: 10 🔻	H A Page: 1 O	1 🕨 🖬 Hems 1 to 1 of
	De	scriptio	n					
~	Oc	tober E	opense Repor	t	Proc	cess Workfow	Delete	,
	Sel	ect a Fil	e Action 🔻	Upload Files	-		Page size: 10 👻	Page: 1 of 1
	_		Ihumbnai	⊦ile Name	Creator	Creation Date		Size
	>		TIF ECM	Hong Kong Expenses 10-20-2011.tif	admin	2/2/2012 10:02:20 AI	М	105168

Workflow task for a document type

2. Click the Process Workflow button.

The Process Workflow window opens.

🗐 Proce	ess Workflow	, s -	o x
¥ 🗈			
	Accept	Reject	
User	Date	Notes	Action
User admin	Date 1/26/2012 5:42:32 PM	Notes	Action accepted
User admin admin	Date 1/26/2012 5:42:32 PM 1/26/2012 5:45:10 PM	Notes	Action accepted accepted

3. Enter the required information for that workflow node. For example, a signature node requires you to accept or reject a document and enter any relevant notes. A summary of the actions already taken on the document are displayed at the bottom of the window. See page 60 for information on different node types.

When you are finished with your action, the window closes, and the workflow automatically moves to the next node. The user assigned to that node receives an e-mail notification and the document is displayed in their Workflow Tasks queue.

**Note**: You can also process workflow tasks directly from the Document Center tab. Click the folder or document type that you want to process. This activates the Process Workflow button and allows you perform the required action. Because the Document Center tab displays all the folders in a cabinet, you will likely see documents that not assigned to you.

## **Starting a Workflow**

You can start a document on a workflow from the Document Center tab. Once you have triggered the workflow, the first user assigned to the workflow task receives an e-mail notification, and the document is displayed on the user's Workflow Tasks tab in Treeno.

Note: You must have the appropriate permissions to start a workflow.

- 1. Click the folder or document type that you want to start on a workflow. This activates the Start Workflow button.
- 2. Click Start Workflow.

The Start Workflow window opens.

🗐 Start Workflow	G	-		×
Start Workflow DO WOF	١K			•
Start Workflow				
Selected Workflow wi folder with index value voucher_number : 10 invoice_number : 469 vendor : Solar Solutio amount : 5200.00	ll be a es: 760 3 ns	applie	d to	

- 3. Select the appropriate workflow.
- 4. If you are triggering a workflow for a document type, select the **Run on Full Folder** check box if you want to apply the workflow to all the files found in that subfolder.
- 5. Click the **Start Workflow** button.

The message is updated when the workflow has successfully started.

# **Using the Treeno Document Binder**

The Treeno Document Binder lets you select files from various cabinets in the Treeno repository and store this custom collection in your own personal "binder". Like an online shopping cart, the Treeno Document Binder holds your selected items until you are ready to process them, which, in this case, involves e-mailing or downloading the documents. This allows you to gather and distribute all the files you need for a specific purpose, regardless of which cabinet they're stored in.

**Note:** The Treeno Document Binder is a permission-based feature of Treeno EDM. Additionally, you must have access to a cabinet in order to add any of its files to your binder.

You select a document for your binder by clicking the paperclip *i*con that is displayed next to the document on the Document Center tab.

Ad	d Document Type 🔻 Invoice 🗙 Main					
A	Add Document Show Search Clear Search					
_	Invoice Number					
~	1554					
	Select a File Action  Upload Files Show Search Clear Search					
	File Name					
	🗆 🖉 🦉 🗟 💀 Northern Invoice.pdf					

After the document has been successfully added to your binder, the paperclip is replaced with the 🥵 icon.

Your binder is always displayed at the top of the Treeno page. The number in parentheses indicates how many items are currently waiting to be processed.



When you click the **Binder** button at the top of the page, a window displays the current contents of your binder. You can choose to download, e-mail the binder items as document or send as links. The following options are available on the **Download** tab:

- PDF Converts the documents to PDF format and merges them into a single PDF file.
- **ZIP** Maintains the native format (TIF, JPG, PDF, Word, etc.) of each document and places them in a ZIP file.

Both options allow you to password-protect the downloaded file.

					Treeno EDM User Guide				
📰 Pa	aper Clipped Files		S	a	×				
Clea	Clear Selected Clear All								
	Southern Invoice.pdf	11/20/2019 2:07:35 PM							
	Northern Invoice.pdf	hern Invoice.pdf 1/3/2020 9:04:03 AM							
	JD Invoice.pdf	1/6/2020 10:01:44 AM							
	▲ 1 ► ► Page size: All	<b>-</b>				3 items	in 1 pa	ages	
Do	ownload Email Attachment(s)	Email Link(s)	SIGNiX	Archive					
O PDF					ZIP Password				
New F	ile Name: Invoice						Down	load	

The following options are available on the **Email Attachments** tab:

- **Native Format** Attaches the individual documents in their native format (TIF, JPG, PDF, Word, etc.) to the email message.
- **PDF** Converts the documents to PDF format and merges them into a single PDF file that is attached to the email message. Can password-protect the emailed attachment.
- **Zip** Maintains the native format of the individual documents and places them in a ZIP file that is attached to the email message. Can password-protect the emailed attachment.

Paper Clipped Files				0	a ×	6
Clear Selected Clear All						1
•		FileName	Created			1
Southern Invoice.pdf	11/20/2019 2:07:35 PM					
<ul> <li>Northern Invoice.pdf</li> </ul>	1/3/2020 9:04:03 AM					
<ul> <li>JD Invoice.pdf</li> </ul>	1/6/2020 10:01:44 AM					
H • 1 • Page size: All	•			3 items	s in 1 pages	
Download Email Attachment(s	Email Link(s) SIGNiX Archive					
Recipients (comma separate multiple):		Select Pa	rties			
Subject:						
Message Body:						
Native Format      PDF     New File Name:				ZIP Password	Send	

### Adding documents to the Treeno Document Binder

- 1. Open the cabinet that contains a document you want to add to your binder.
- 2. Double-click the appropriate folder so its contents appear in the lower half of the Document Center tab.
- 3. Next to the document you want to add, click the paperclip *O* icon. The *S* icon is displayed, and the Binder button at the top of the Treeno page shows the number of items that are now in your binder.



- 4. Repeat steps 1 3 to add additional documents to your binder, as needed.
- 5. When you are finished, click the **Binder** button to download or email your "paper-clipped" documents.

### **Downloading documents in the Treeno Document Binder**

- 1. If necessary, clear the check box next to each item you do NOT want to download.
- 2. Select the format of the downloaded documents:
  - PDF Converts the documents to PDF format and merges them into a single PDF file.
  - **ZIP** Maintains the native format (TIF, JPG, PDF, Word, etc.) of each document and places them in a ZIP file.
- 3. To password-protect the PDF or ZIP file, enter the password that must be entered to access the downloaded data.
- 4. Enter a name for the file.
- 5. Click Download. The file is sent to your default Downloads folder.
- 6. Click **OK** to clear the Treeno Document Binder. Otherwise, click **Cancel** to leave the items in the binder. After you clear the binder, the Binder button at the top of the Treeno page will display (0).

### **Emailing documents from the Treeno Document Binder**

1. If necessary, clear the check box next to each item you do NOT want to email.

Paper Clipped Files				ら 日 ×
Clear Selected Clear All				
		FileName	Created	
JD Invoice.pdf	1/6/2020 10:01:44 AM			
<ul> <li>Northern Invoice.pdf</li> </ul>	1/3/2020 9:04:03 AM			
Southern Invoice.pdf	11/20/2019 2:07:35 PM			
If f I Page size: All	<u>_</u>			3 items in 1 pages
Download Email Attachment(s)	Email Link(s) SIGNiX Archive			
Recipients (comma separate multiple):				
jc@treenosoftware.com			Select Parties	
CC Myself				
Subject:				
Invoices				
Message Body:				
Here are the invoices you wer	asking for.			
Native Format      DDE				710 Decement
Allow File Manage				J ZIP Password
New File Name:				Send

- 2. Enter the email address of each person you want to send the documents to. Separate multiple email addresses with a comma.
- 3. Select the **CC Myself** check box if you want to receive a copy of the email message.
- 4. Enter the subject line and message to be displayed.
- 5. The documents will be attached to the email message you create. Select the format of the attachment(s):
  - **Native Format** Attaches the individual documents in their native format (TIF, JPG, PDF, Word, etc.).
  - PDF Converts the documents to PDF format and merges them into a single PDF file.
  - Zip Maintains the native format of the individual documents and places them in a single ZIP file.
- 6. To password-protect a PDF or ZIP file, enter the password that must be entered to access the downloaded data.
- 7. Enter a name for the file.
- 8. Click Send. The email is sent using your default email application.
- 9. Click **OK** to clear the Treeno Document Binder. Otherwise, click **Cancel** to leave the items in the binder. After you clear the binder, the Binder button at the top of the Treeno page will display (0).

### **Emailing Links from the Treeno Document Binder**

1. If necessary, clear the check box next to each item you do NOT want to email.

- raper clipped riles			9	
Clear Selected Clear All				
<b>2</b>		FileName	Created	_
<ul> <li>JD Invoice.pdf</li> </ul>	1/6/2020 10:01:44 AM			
<ul> <li>Northern Invoice.pdf</li> </ul>	1/3/2020 9:04:03 AM			
<ul> <li>Southern Invoice.pdf</li> </ul>	11/20/2019 2:07:35 PM			
If (1) Page size: All	·		3 items in	1 pages
Download Email Attachment(s)	Email Link(s) SIGNIX Archive			
Max Downloads: 1			Expiration Date: 2020-02-04	
Recipients (comma separate multiple):				
jc@treenosoftware.com				
Subject:				
Invoices				
Message Body:				
Here are the invoices you aske	d for			ור
ZIP Password			File Name:	
Native Format			Send Link General	ate Link

- 2. Enter the max number of downloads the recipient can access links. Note: This is defaulted to 1.
- 3. Enter the Expiration Date of when the recipient will have access to links. Note: This date defaults to 30 days.
- 4. Enter the email address of each person you want to send the links to. Separate multiple email addresses with a comma.
- 5. Enter the subject line and message to be displayed.
- 6. The documents will be attached to the email message you create. Select the format of the attachment(s):
  - **Native Format** Attaches the individual documents in their native format (TIF, JPG, PDF, Word, etc.).
  - Zip Maintains the native format of the individual documents and places them in a single ZIP file.
- 7. To password-protect a ZIP file, enter the password that must be entered to access the downloaded data.
- 8. Enter a name for the file.
- 9. Click Generate Link.
- 10. Click Send Link. The email is sent using your default email application.
- 11. Click **OK** to clear the Treeno Document Binder. Otherwise, click **Cancel** to leave the items in the binder. After you clear the binder, the Binder button at the top of the Treeno page will display

# **Resources and Support**

Treeno offers several technical support options to provide you with the help you need, when you need it. All telephone support requests are answered in person by one if our support professionals at our headquarters in Portsmouth, New Hampshire.

To contact Treeno Support, please call 1-800-528-5005 X1 or email us at support@treenosoftware.com