TREENO ELECTRONIC DOCUMENT MANAGEMENT

User Guide

Contents

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.

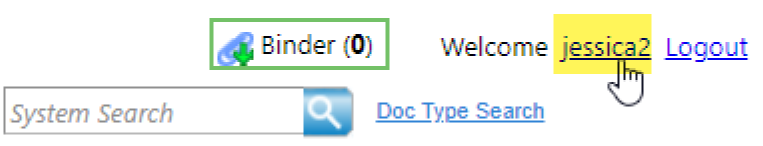
   The Treeno start page opens. This page is divided into two panes. The **left pane** displays links to information, such user guides, manuals, articles or to request support. If you are using the in-house Treeno Document Server, this information is configured by your organization. If you are using Treeno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

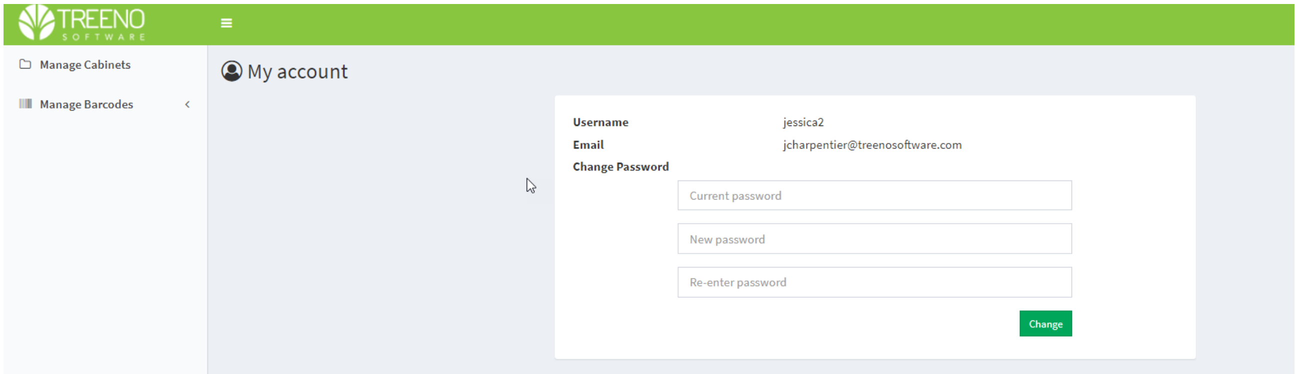
   Note: Contact your IT representative if you do not know your Treeno login credentials.

Changing Your Password

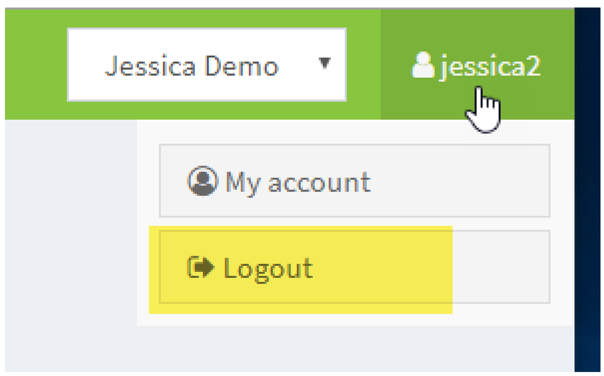
1. On the Treeno start page, click your username link in the top-right corner.



2. The Treeno Administration page opens. The ability to change your will be located on the home page

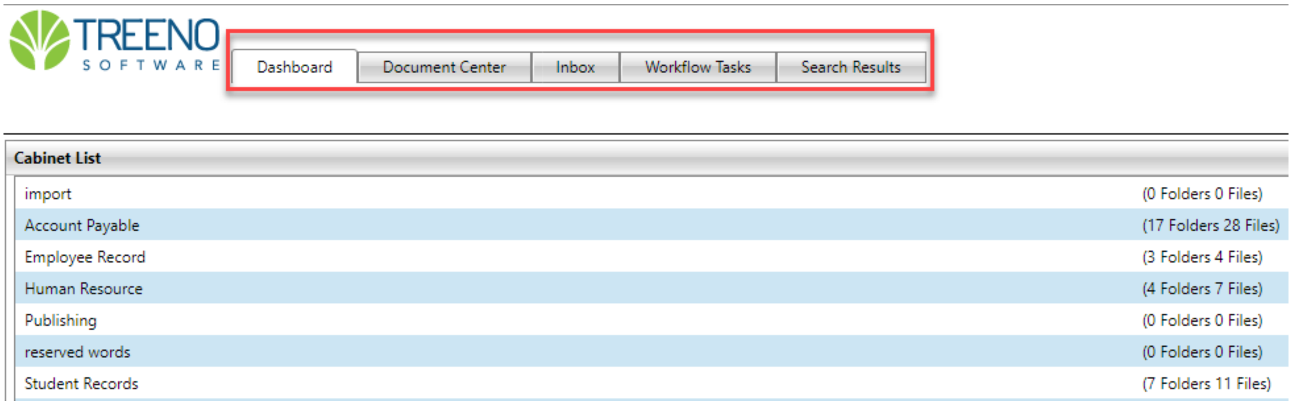


3. Enter your new password and then confirm this password.
4. Click **Change**.
5. To log out of the Admin page, click your username to the upper right-hand side of the page.



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.



- **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.

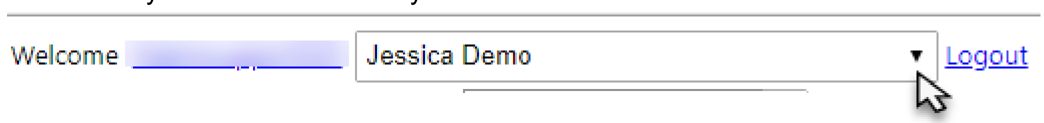
Accessing Administration

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**  button.

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.

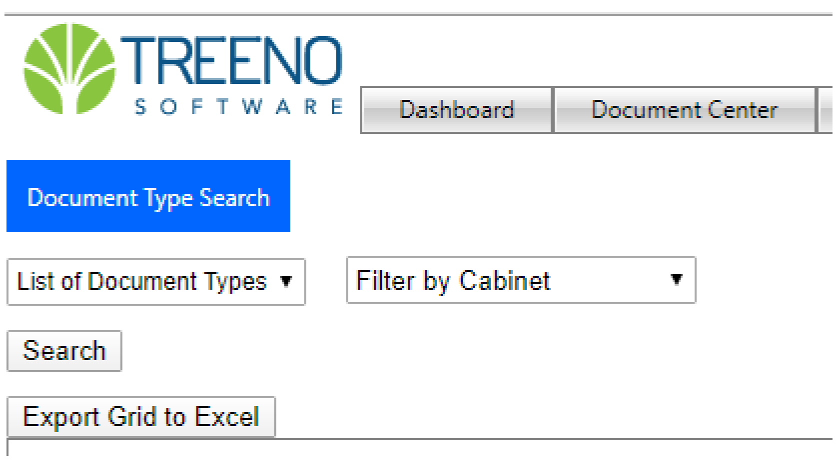
Performing Doc Type Searches

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.

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.

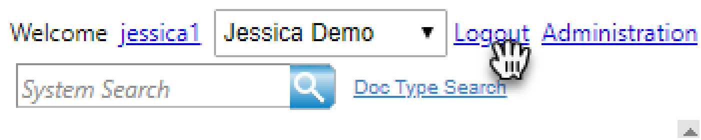


5. To narrow the search, you can add values into the index fields listed.
6. Click **Search.** All document type indexes, and a list of associated files will display. Note that the index field allows for additional filtering
7. Click the file in the search results. You will be directed to the file within 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.

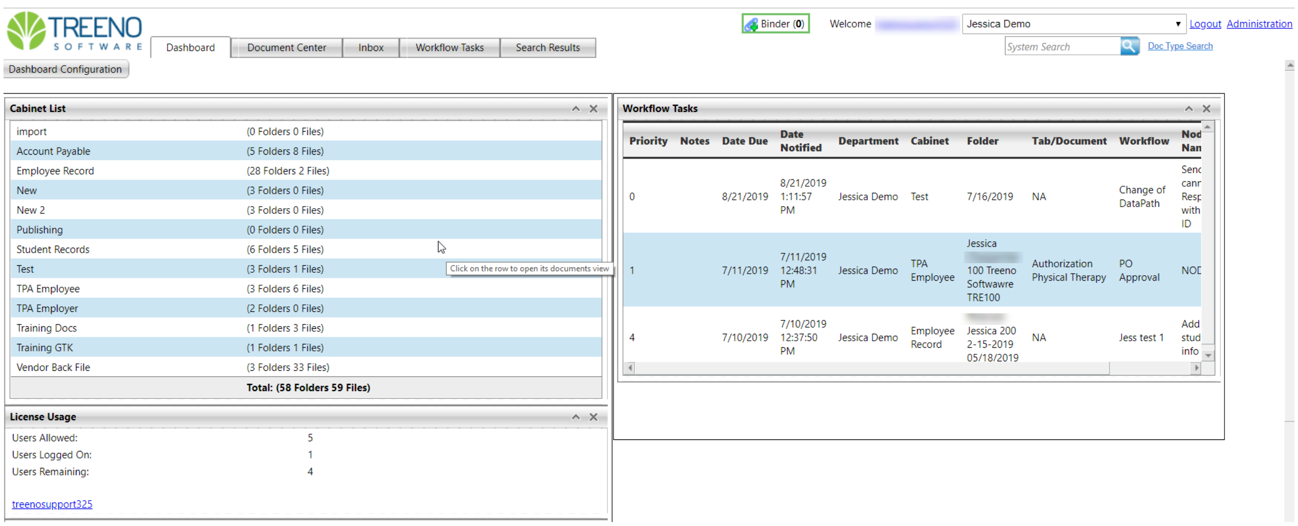
To end your Treeno EDM session, click the **Logout** link in the top-right corner of the window.



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.

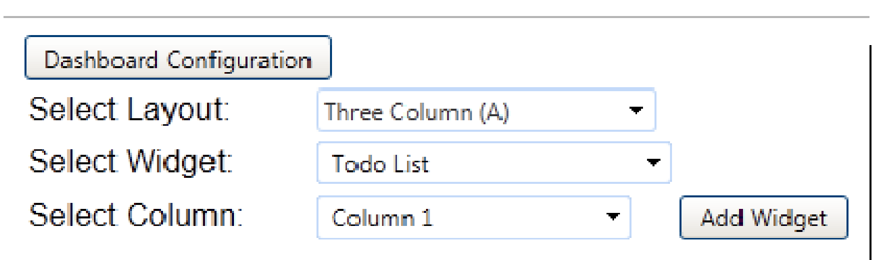
You can configure the layout, columns, and content of your dashboard to meet your individual needs. The settings you choose are automatically saved.



Configuring the Dashboard

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

   The configuration options are displayed:



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.

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.

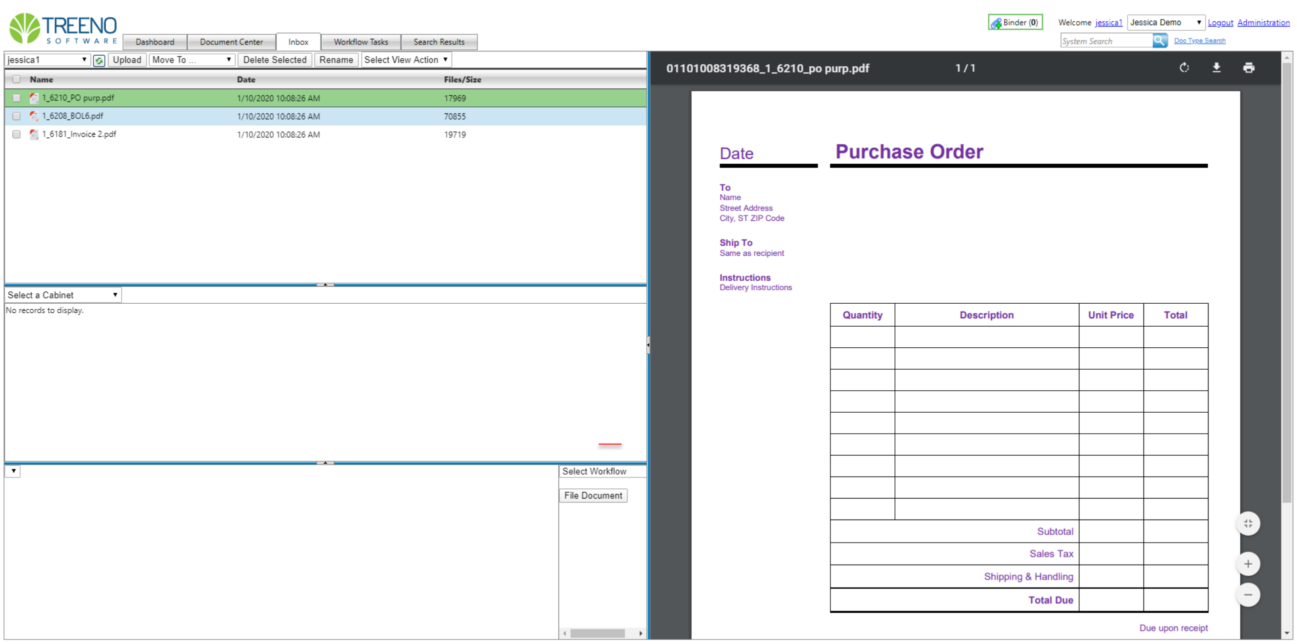
Using the Inbox

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.



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

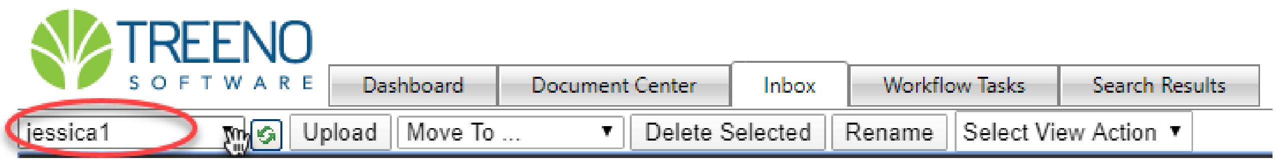
You can delete an inbox file.

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.

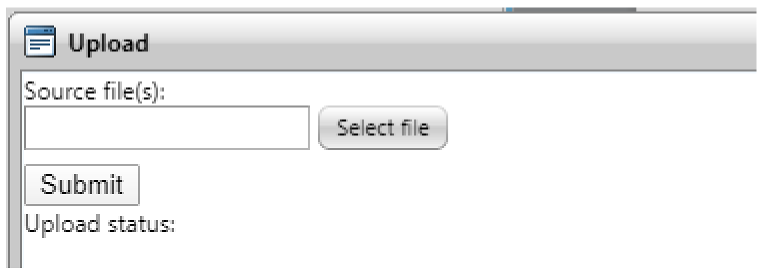
Uploading Files to an Inbox

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.



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

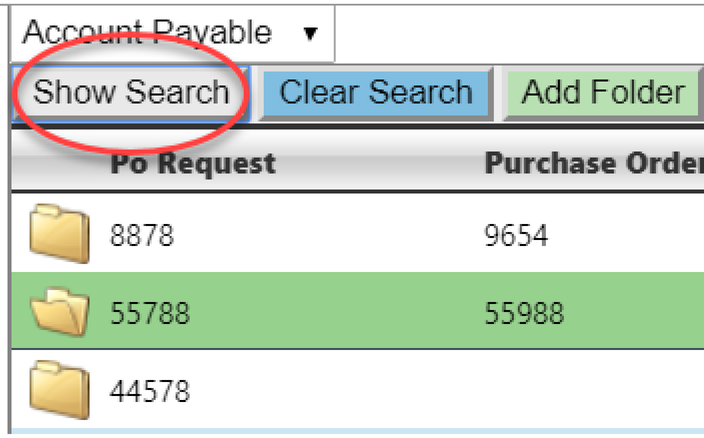
When you index a file in Treeno, you add it to a selected cabinet and enter information from the file in the cabinet's index fields. If a folder doesn't already exist for the file, a new one is created. If a folder does exist and is organized by document type, you must complete two additional steps: (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:

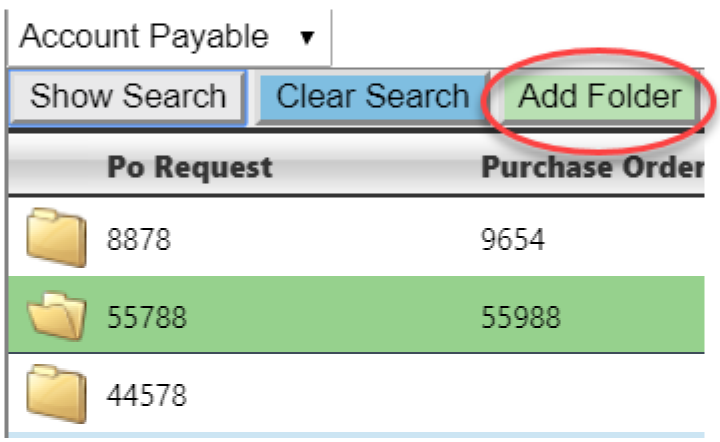
   - To add the file to an existing folder: Click the **Show Search** button.



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.

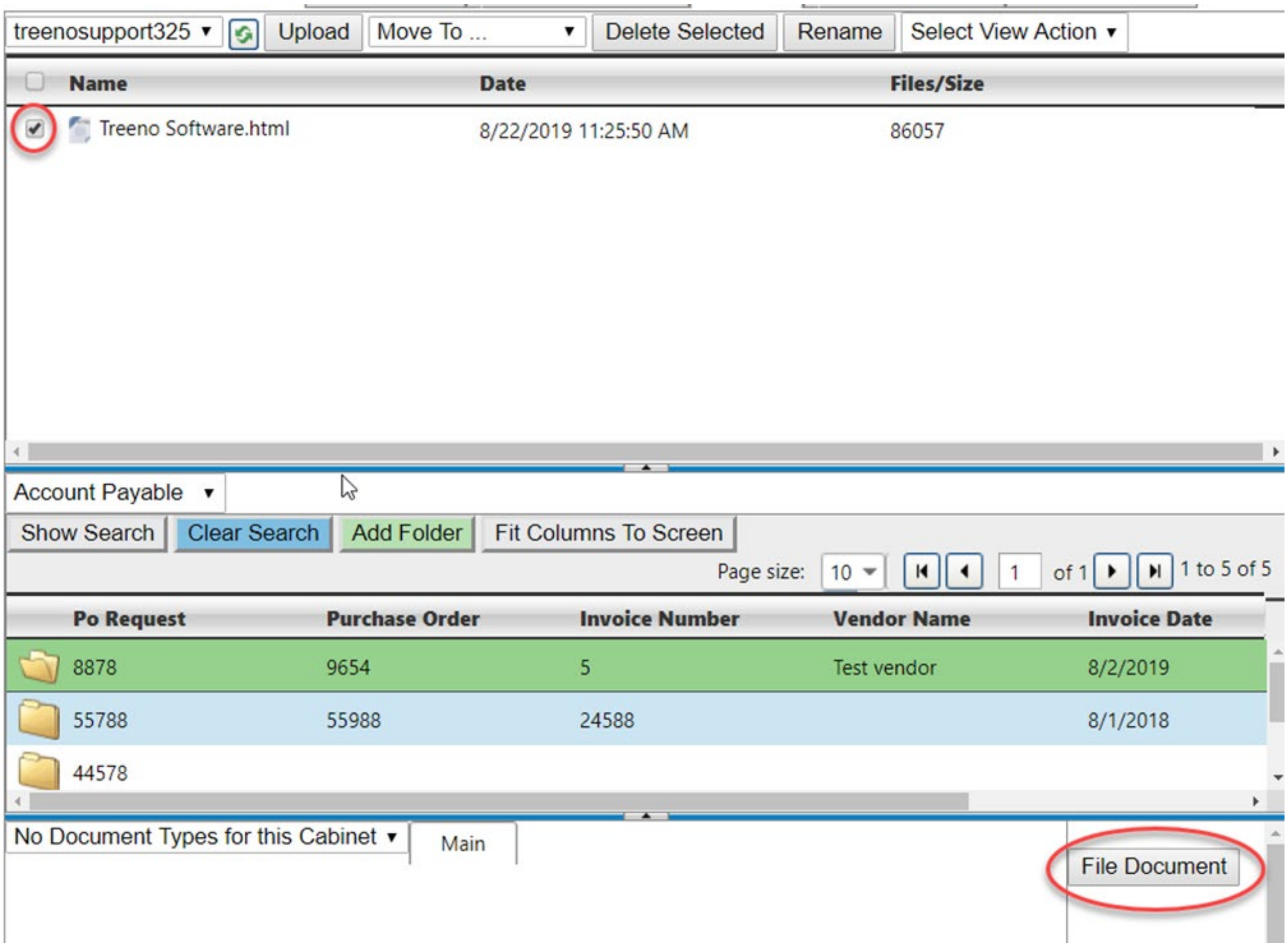
Note: Click the **Clear Search** button to once again display all the folders in the cabinet and hide the search criteria fields.

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



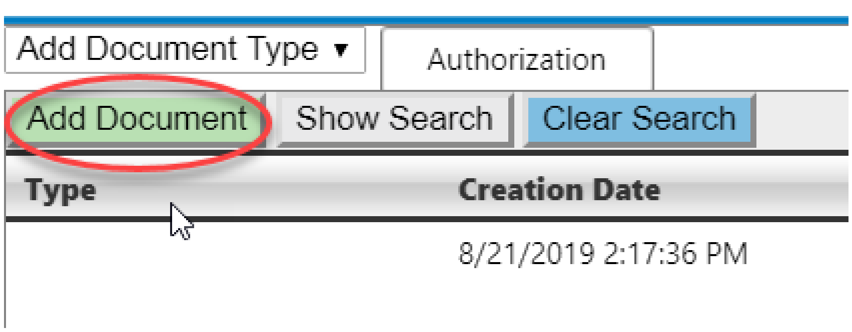
The Edit Form window opens. Complete the cabinet index fields and click **Insert**. The folder you created is displayed in the folder grid. Click the folder to open it.

3. Click the **File Document** button.



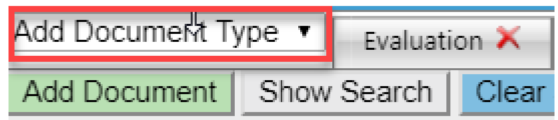
4. Do one of the following to add the file to a Document Type:

- To add the file to an existing document type in the folder: 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**.



- To add the file to a new document type: 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.

Managing the Document Center

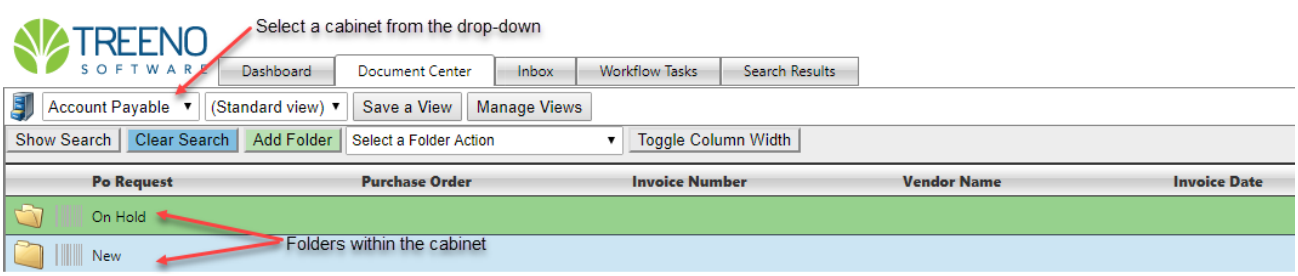
Most of your time in Treeno EDM will be spent working with the Document Center tab. This is where you will find a list of cabinet folders and the files and document types that are contained in those folders.

This section covers the following topics:

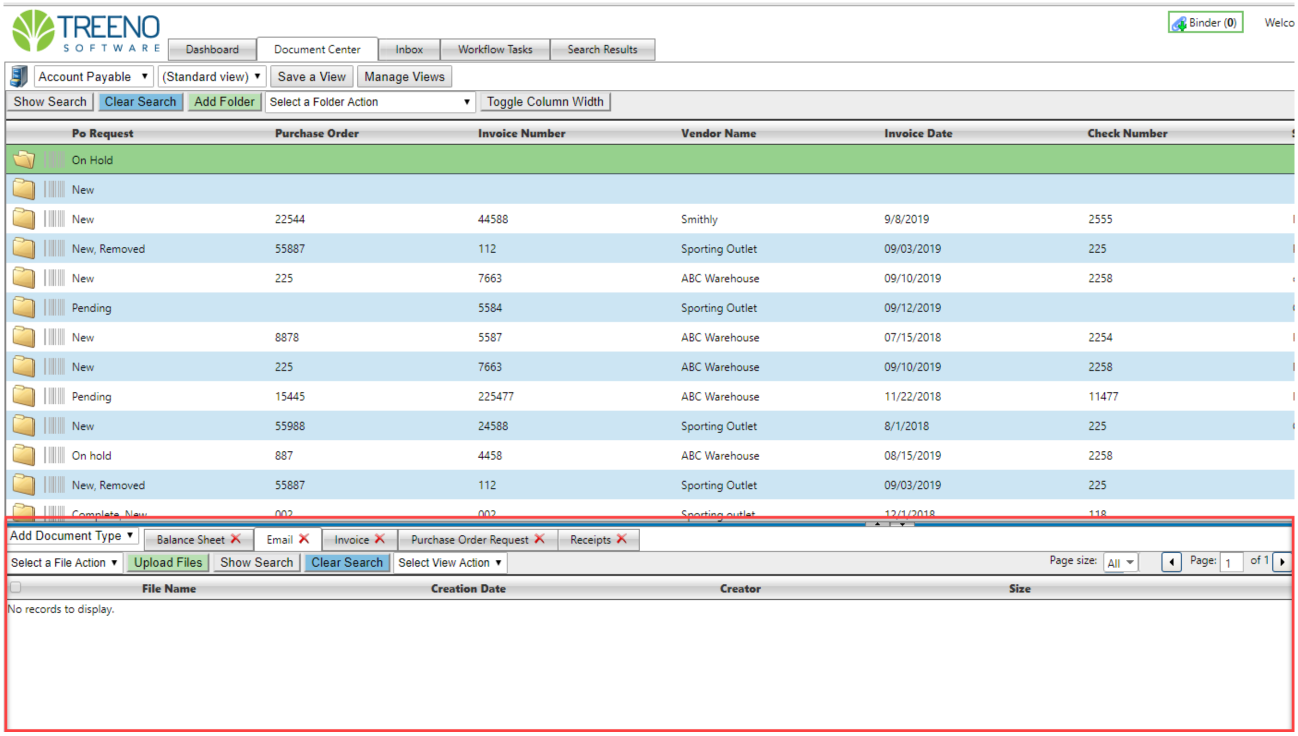
- Navigating the Document Center tab
- Understanding cabinets, folders, and document types
- Searching within a cabinet
- Customizing your cabinet view
- Working with folders
- Working with files and document types

Navigating the Document Center Tab

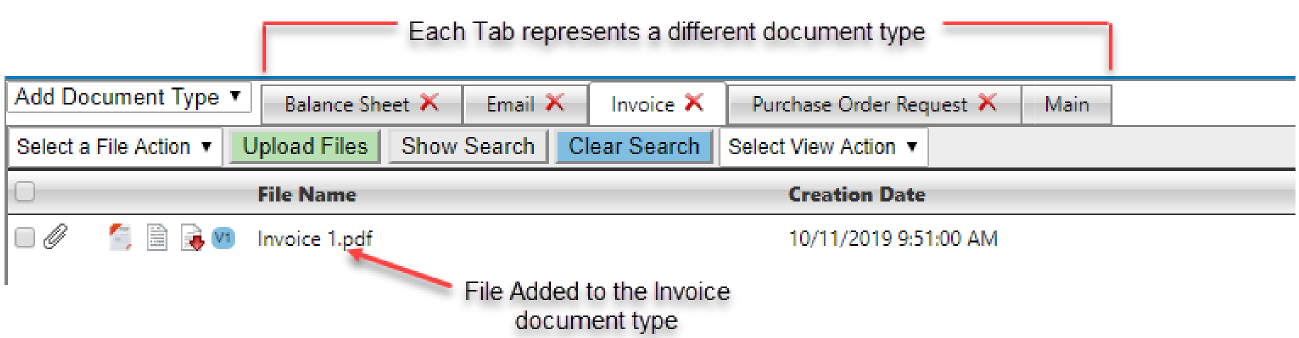
When you select a cabinet, its folders are displayed in the upper part of the Document Center tab. Using the Folder Action options, you can create, modify, delete, and export folders. Folders are displayed in a grid format, with each column header representing a cabinet index field. This grid can be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



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



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.



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

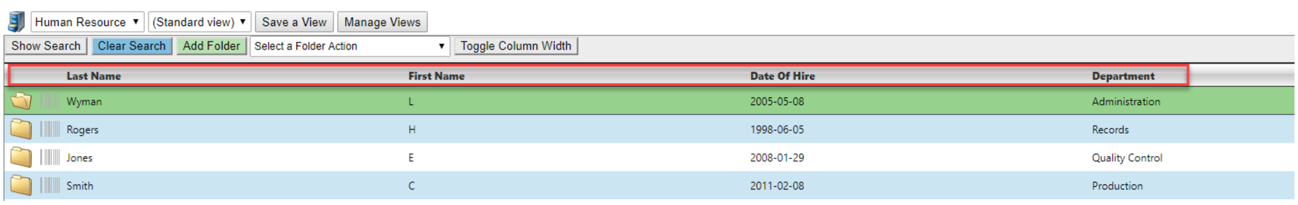
Cabinets are the basic storage units within Treeno EDM. Cabinets contain folders and files just as they do in the physical world.

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.

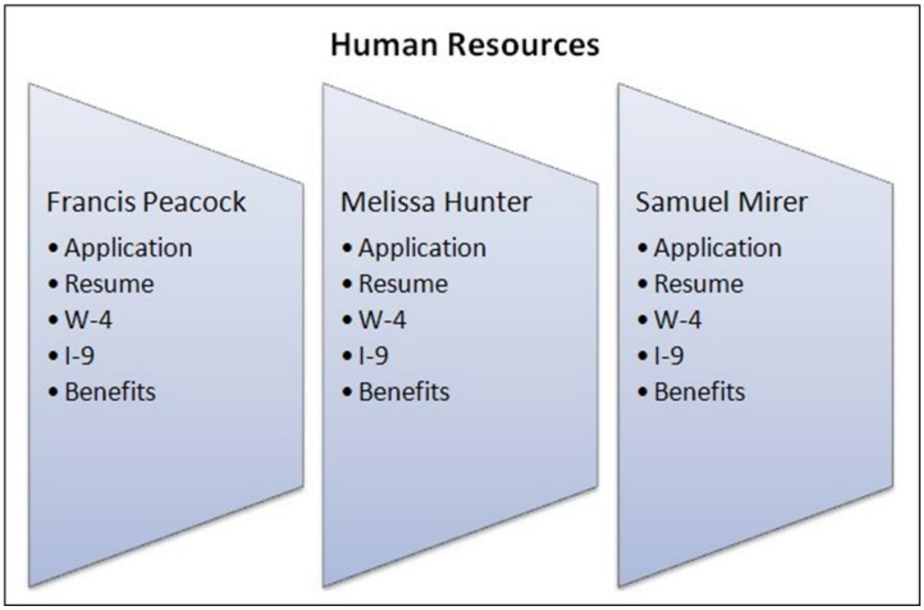
Each cabinet is identified by a unique set of index fields that describe the information it contains. A Human Resources cabinet, for example, typically contains employee records, so it may have the following index fields: Last name, First name, Date of hire, and Department.

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



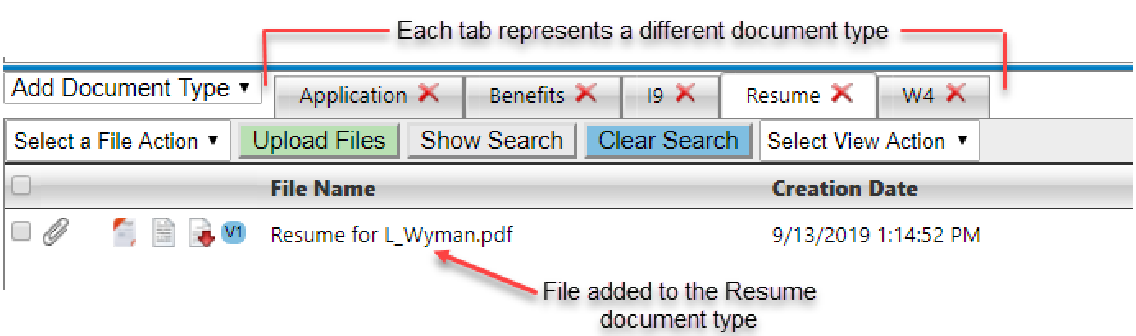
When you created a new folder and complete the index fields, Treeno creates a new folder for documents to be placed and displays it in the cabinet. When you view the cabinet, you can see a list of all the folders it contains. Typically, each folder contains a single file, but you can add an unlimited 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:

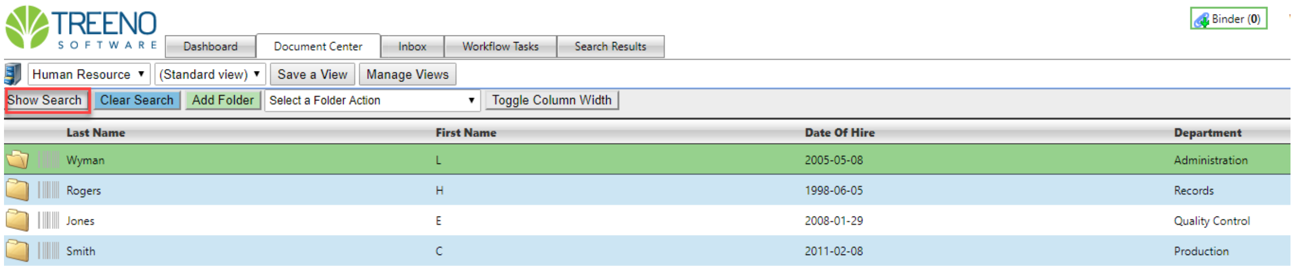
Rather than storing these files at the root level of the employee folder, which may be cumbersome if you have dozens of documents for each employee, you can add tabs to the folder that represent each document type. When you group files according to document type, you provide visual organization to a 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.



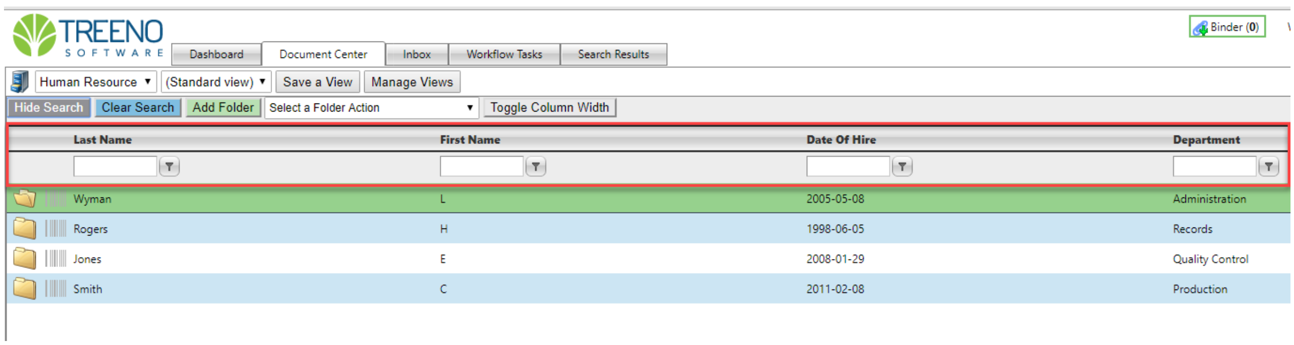
Searching within a Cabinet

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.



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.



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

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.

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

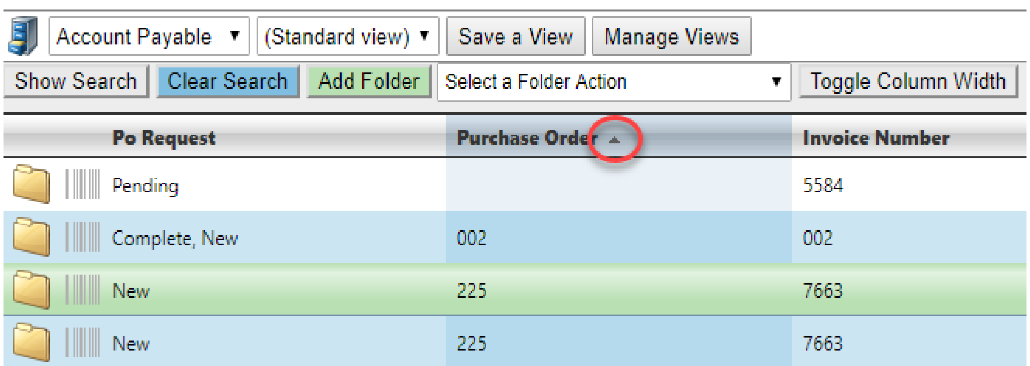
The column headings that are displayed represent the cabinet's index fields. You can save your configurations using the **Save Folder View** option (see page 30).

Sorting Folders

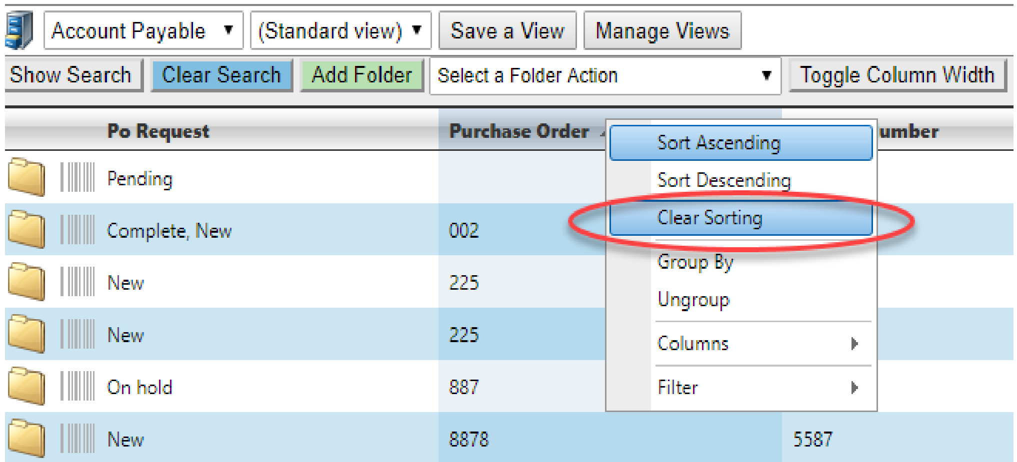
You can reorder the folders in a cabinet by sorting columns in ascending or descending order.

1. 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.



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



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.

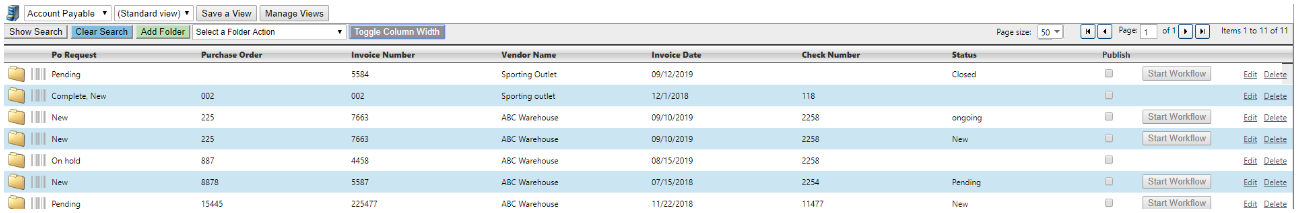
To display or hide columns

- 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.

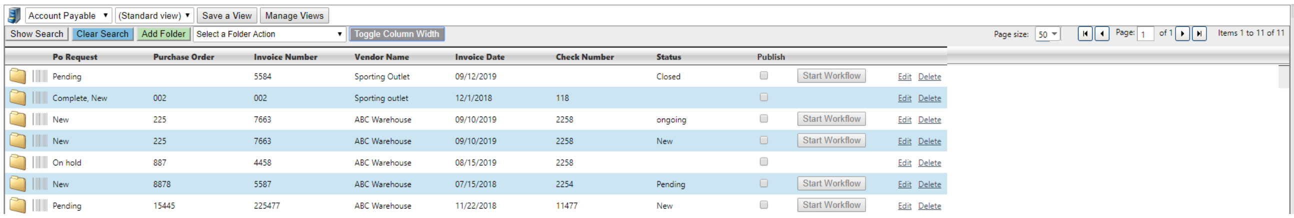
Toggle Column Width

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



After clicking Toggle Column Width



Grouping Folders

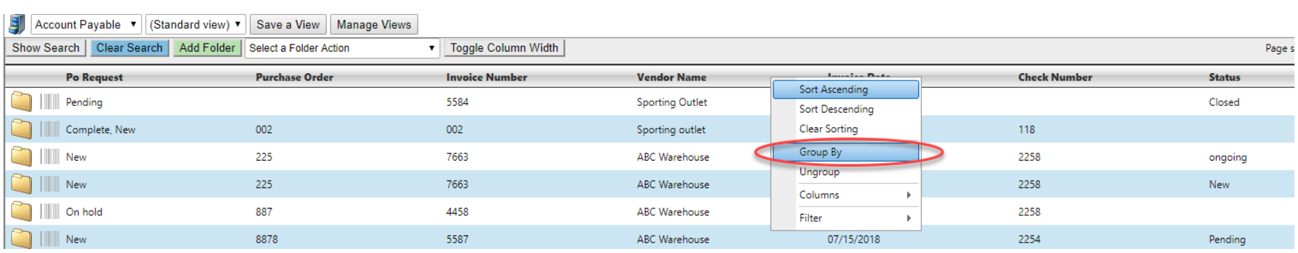
You can organize the folders in a cabinet by grouping them together by column. In an Accounts Payable cabinet, for example, you could group folders by vendor name. The name of the column you are grouping by is displayed at the top of the folder list. Each group of folders is then displayed in alphabetical 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:

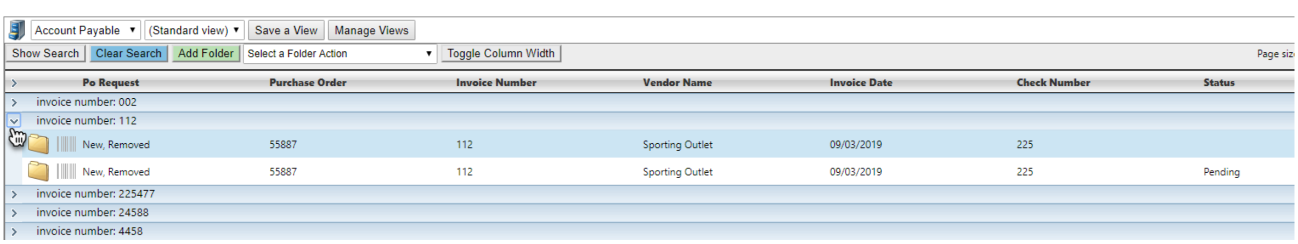
To group folders

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

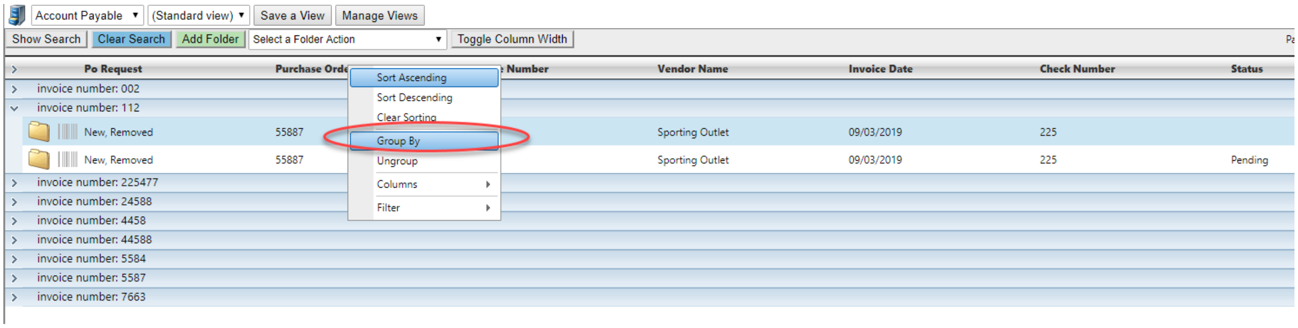
   The folders are grouped by the column header you right-click.



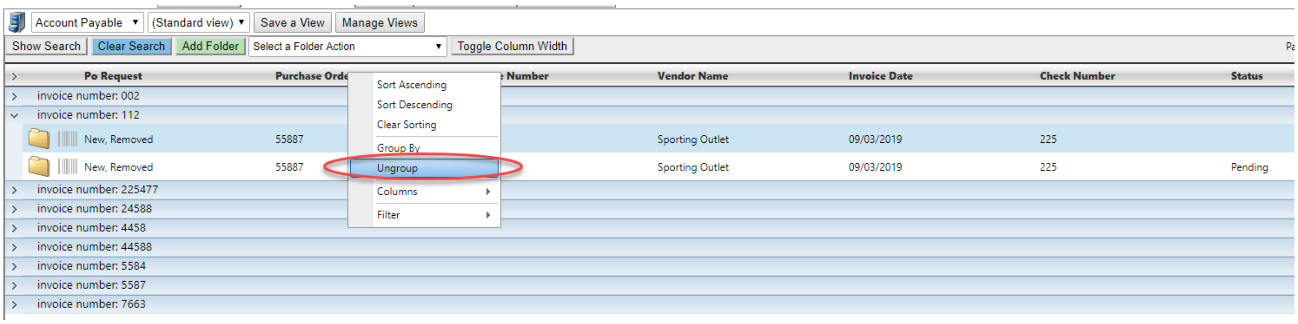
2. To expand or collapse a grouped row, click the greater than arrow  or drop-down arrow  to the left of the row.



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



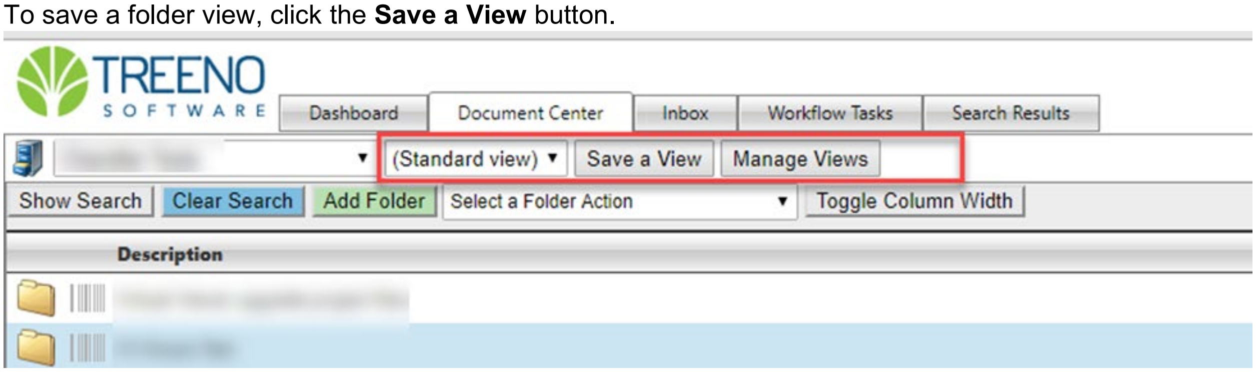
4. To remove a grouping, right-click a column header in the group and click **Ungroup**.



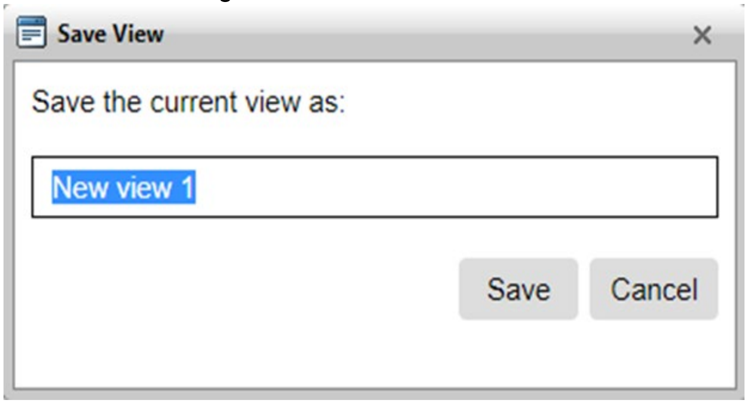
Saving Your Folder View

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.

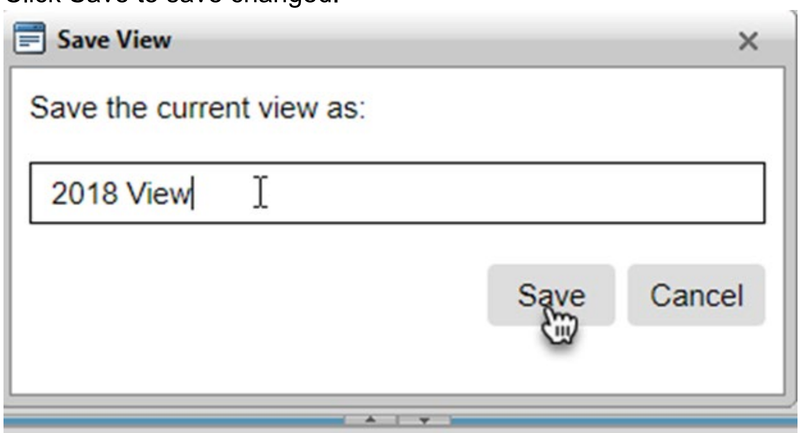
1. To save a folder view, click the **Save a View** button.



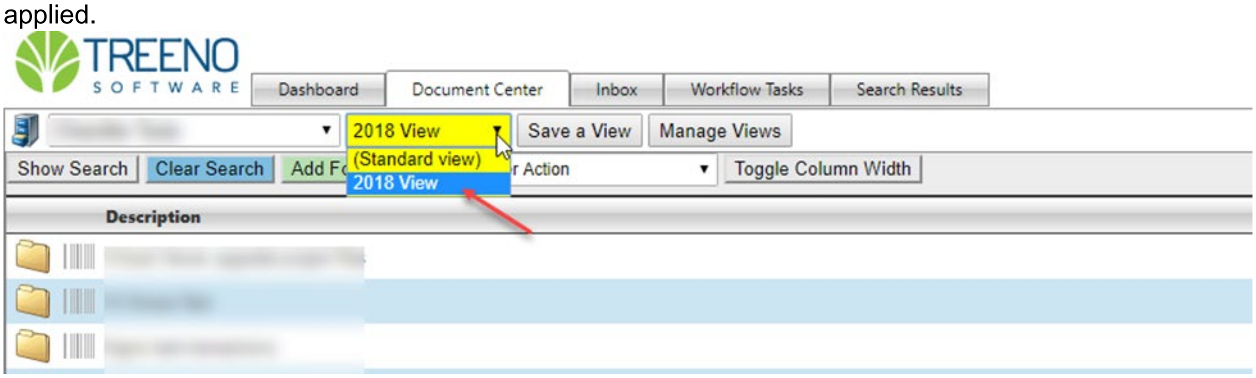
2. A Save View modal window will open. The text field is defaulted to New view (number) and the field is editable to change the save view title.



3. Click Save to save changed.

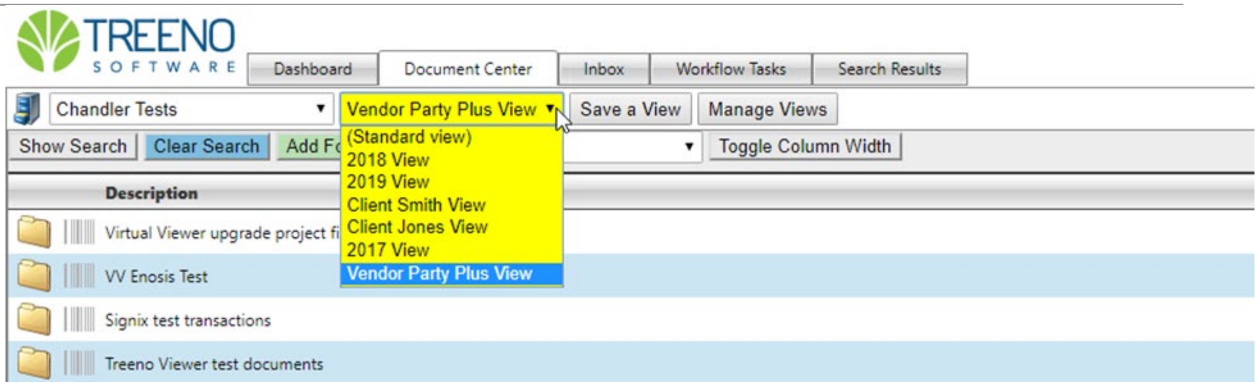


4. Click Cancel to close the modal window with no saved changes.
5. You will see that within the **Save Folder View** drop-down, the created saved view title has been applied.



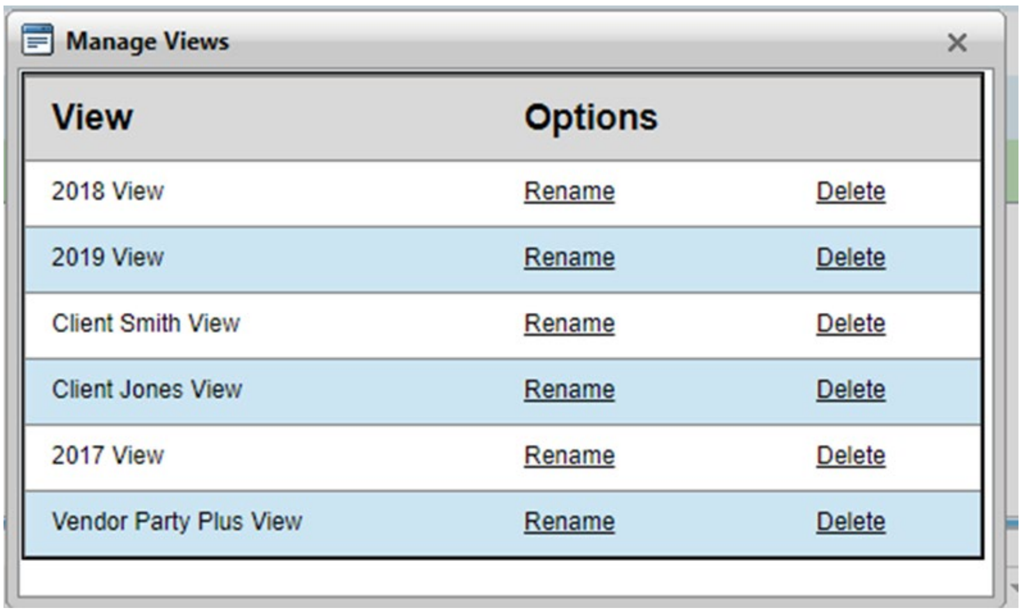
Continue to add the folder views as needed. The views will continue to be added to the **Save Folder View** drop-down.

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



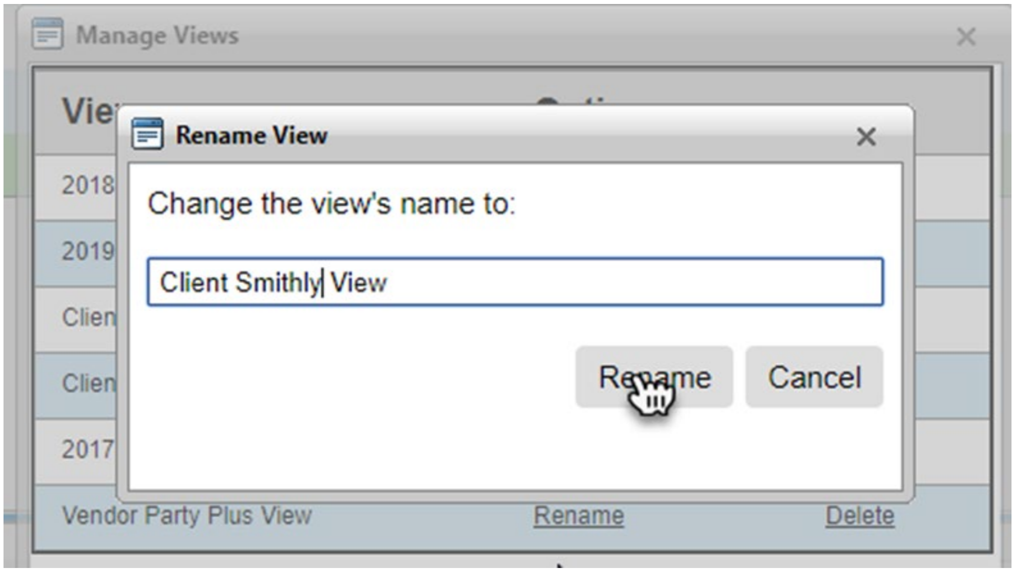
The **Manage Views** button allows for a saved folder view to be renamed or deleted.

1. To access, click the **Manage Views** button.
   A Manage Views modal window will open with a list of saved folder views.

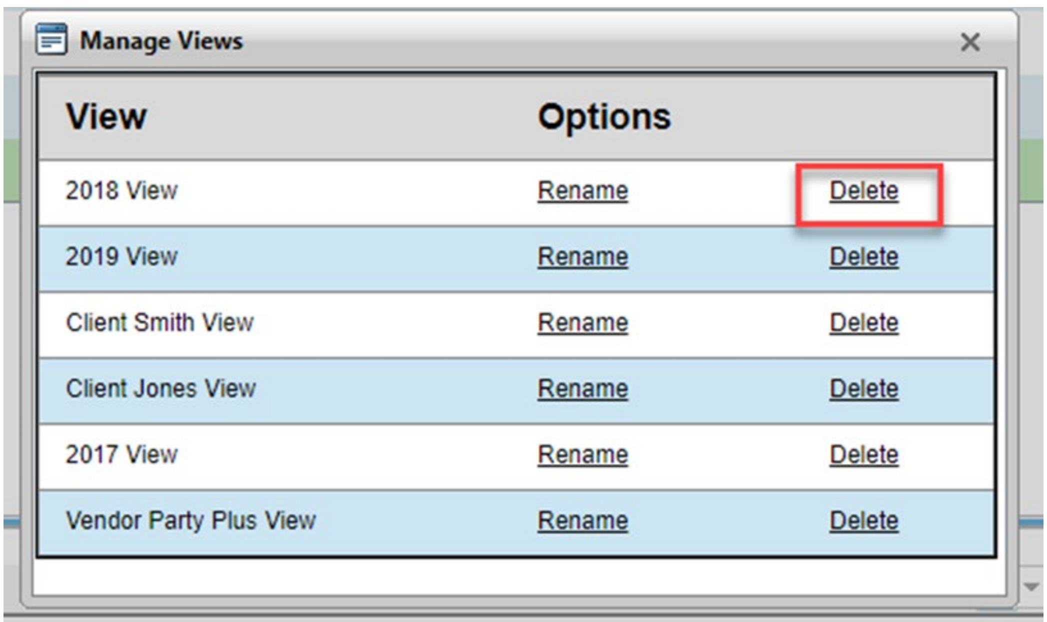


2. To rename an existing save view name, click **Rename**.
   A **Rename View** modal window will open. The name field is editable, allowing the user to change the save folder view name.
3. Click **Rename** to change the saved view name.

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



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

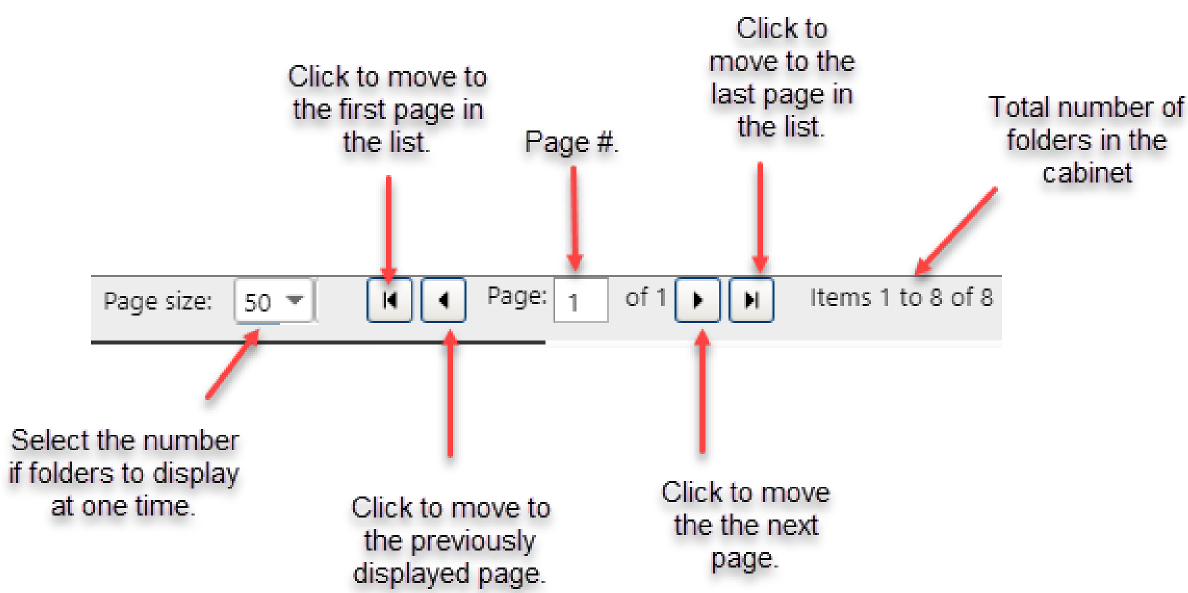
The upper part of the Document Center tab displays the folders that are stored in a selected cabinet. Several options are available to help you manage these folders. In addition to opening a folder and viewing its content, you can create new folders, edit folder index values, delete folders, and export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

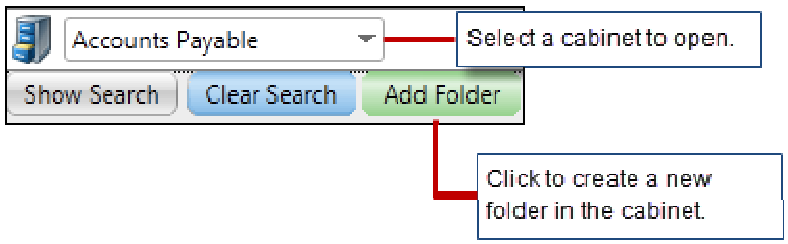
By default, folders are displayed 50 per a page. You can manage how many folders you wish to see per a page and navigate through the folder pages by the following:



Creating New Folders

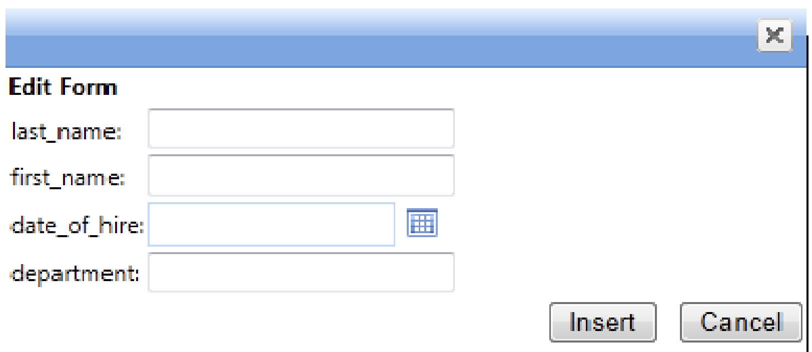
Each time you scan or upload a file into Treeno, you must select the folder where you want to store the file. If a folder doesn't already exist, you can create a new one and enter its cabinet specific index values. Users can then search on those values to later locate the folder and retrieve its files.

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



2. Click the **Add Folder** button.

   The Edit Form window opens.



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.

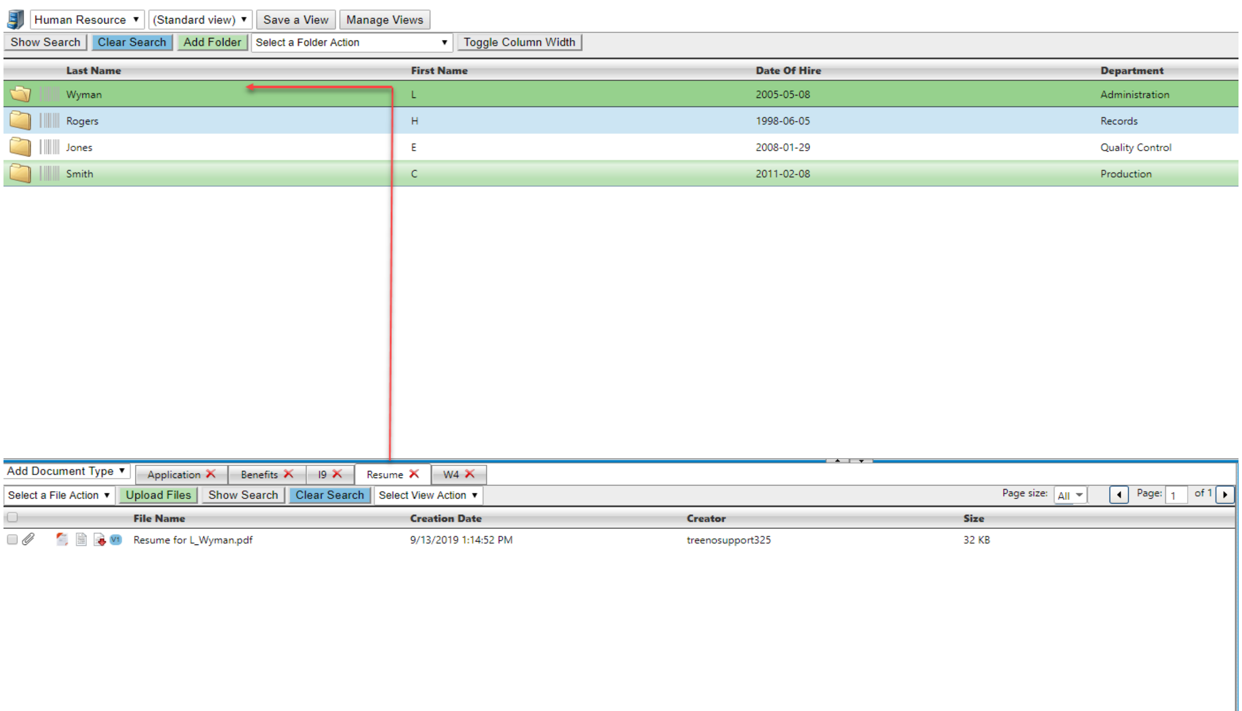
Working with Files and Document Types

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).

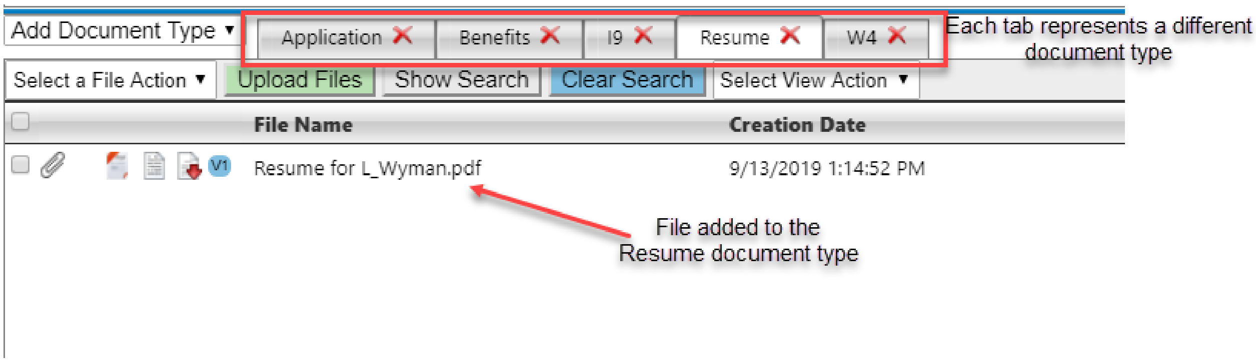
In addition to viewing the files in a folder, you can download, move, copy, version, and print barcodes for files. Using the Virtual Viewer, you can also annotate files.

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:

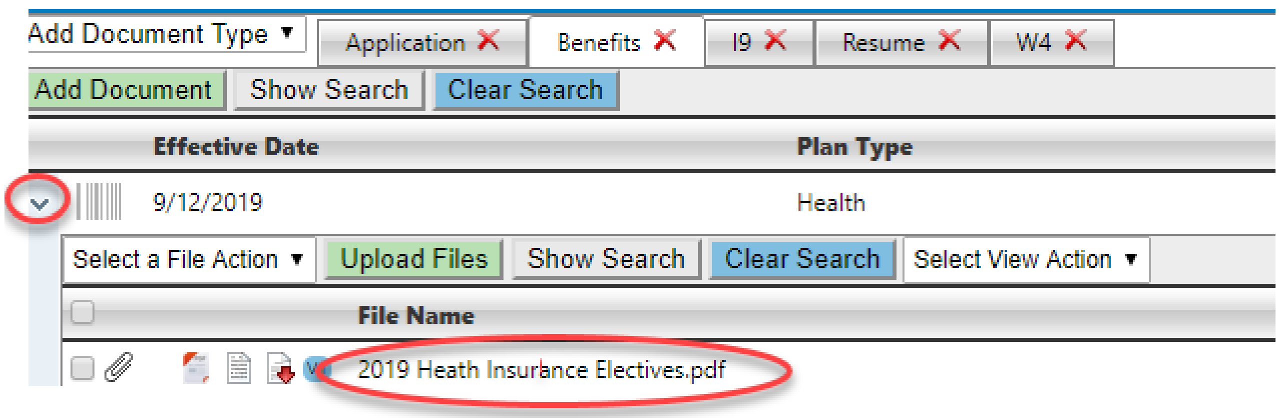


Most folders contain tabs that organize the files into different document types. These tabs are displayed across the top of the viewing area. Click a tab to view the files it contains.



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:



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

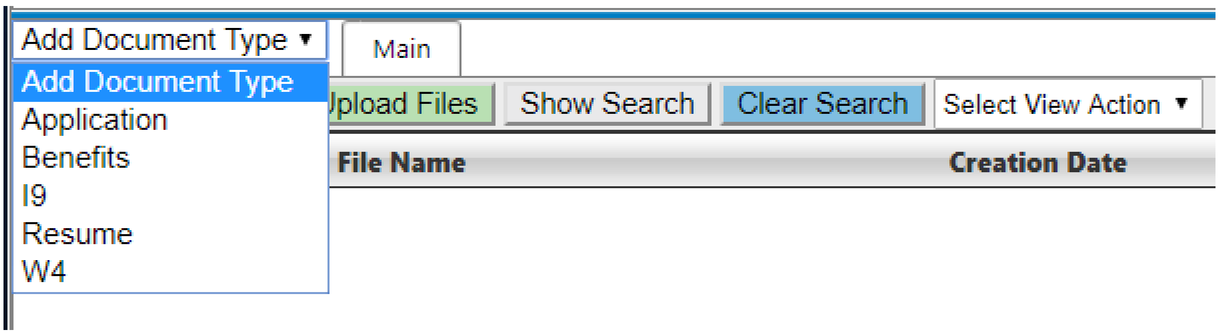
- Point to the file to view its thumbnail in the preview pane on the right.
- Click the file to annotate it in the Virtual Viewer (see page 55).
- Select the check box to the left of the file and select a file action from the drop-down list (see the following sections).

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.

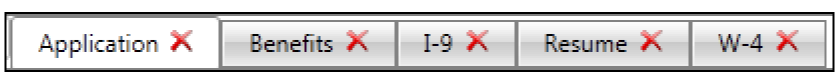
1. In the **Add Document Type** drop-down list, select the document type you want to add.
2. If the document type you selected has been configured with index fields, The Edit Form window opens and displays the index fields that must be completed.
3. Enter or select the appropriate index values and click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



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.



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

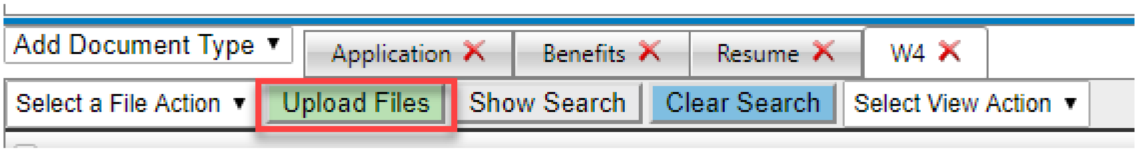
Uploading Files

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.

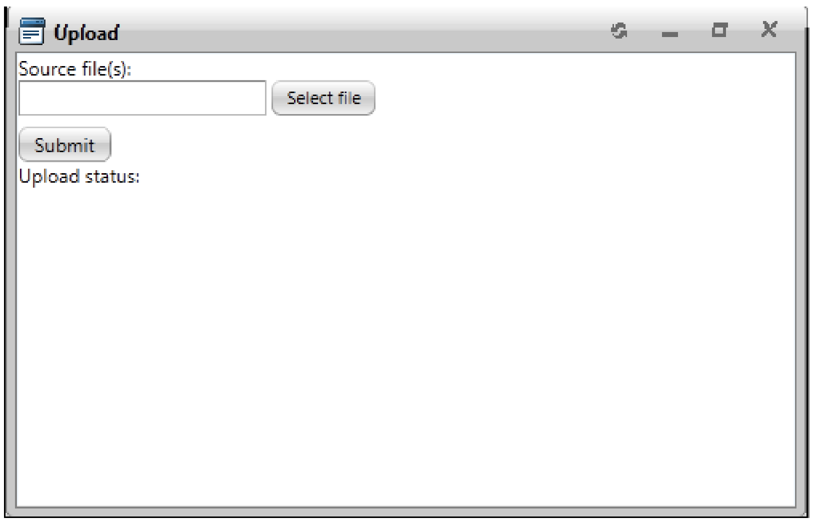
Note: You can also add files to Treeno by printing a barcode and scanning the files to that location.

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.



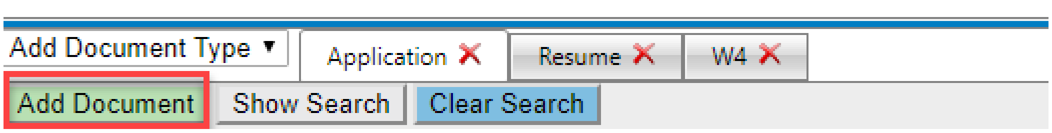
3. Click the **Select File** button.
4. Navigate to and select the files you want to upload. You can upload multiple files at one time.
5. Click the **Open** button.

   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.

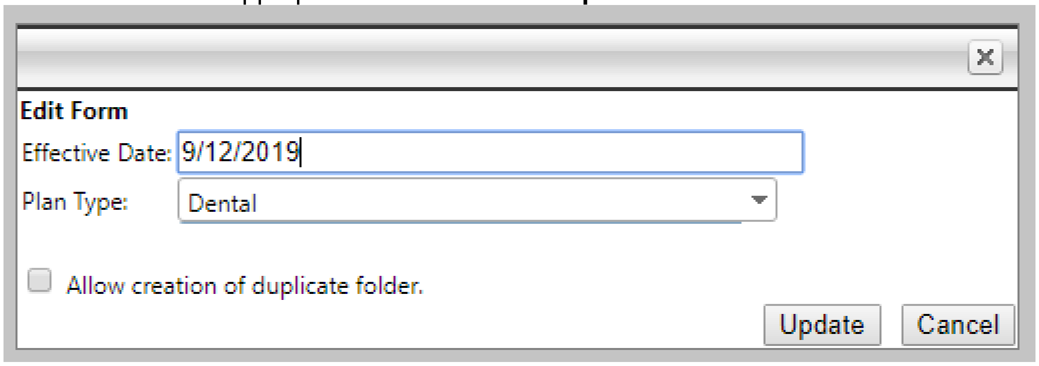
Adding Files to a Document Type with Index Fields

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

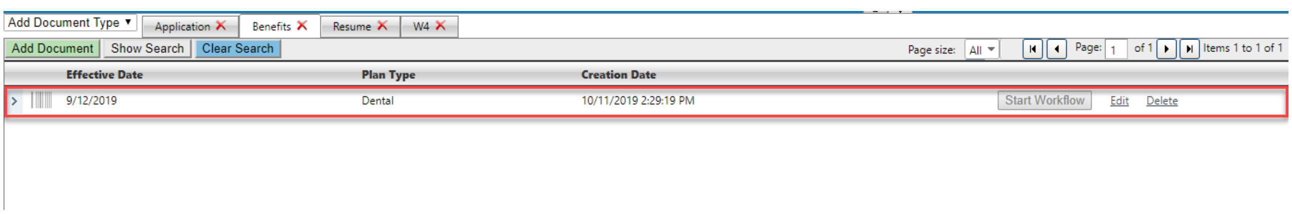


The Edit Form window opens and displays the index fields that must be completed for the document type.

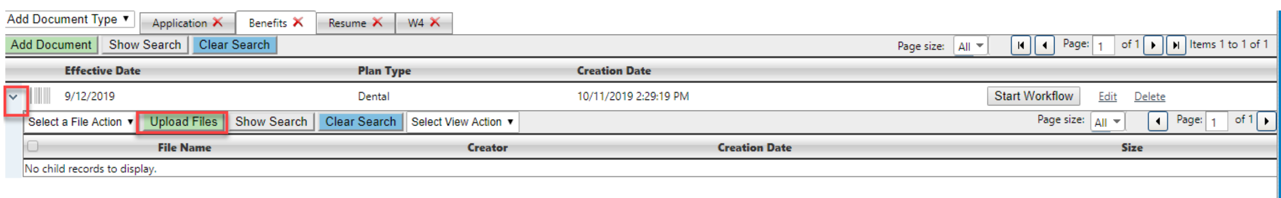
3. Enter or select the appropriate values and click **Update**.



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



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



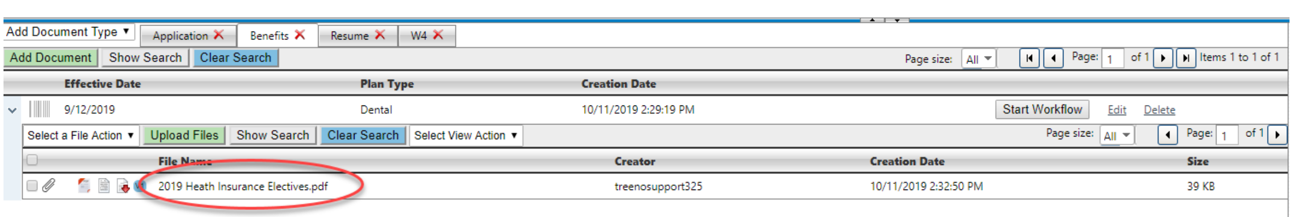
The Upload window opens.

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.

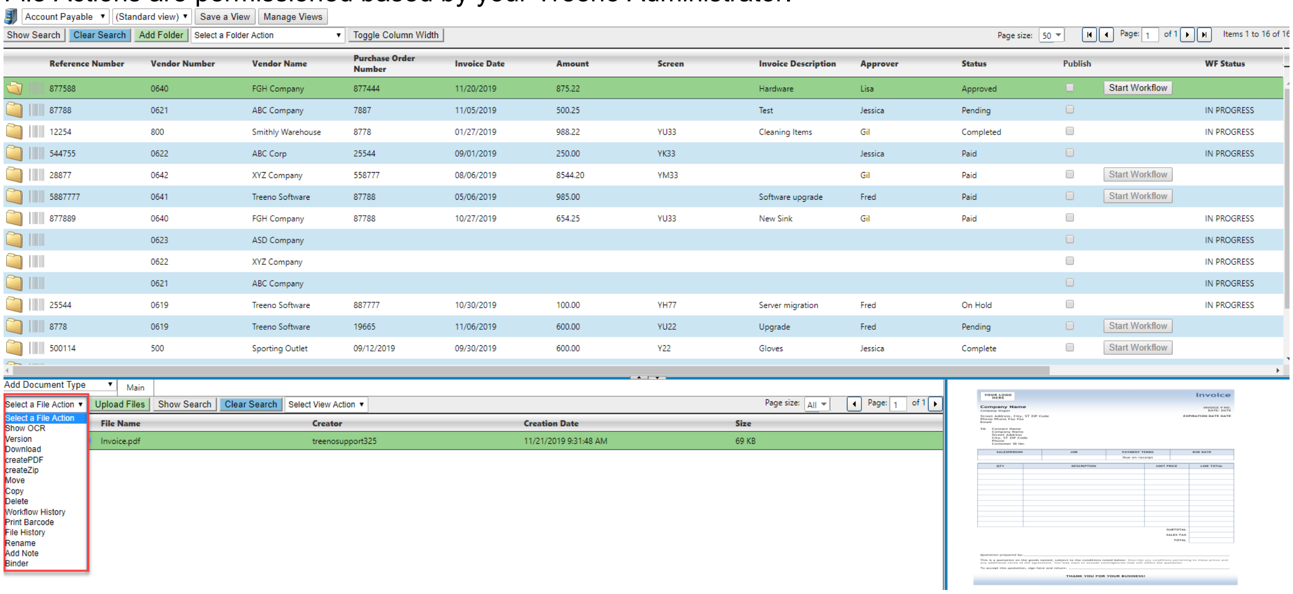
8. Click **Submit**.

The file is displayed under the row you selected.



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.



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.

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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**.
   - For document types with index fields: 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

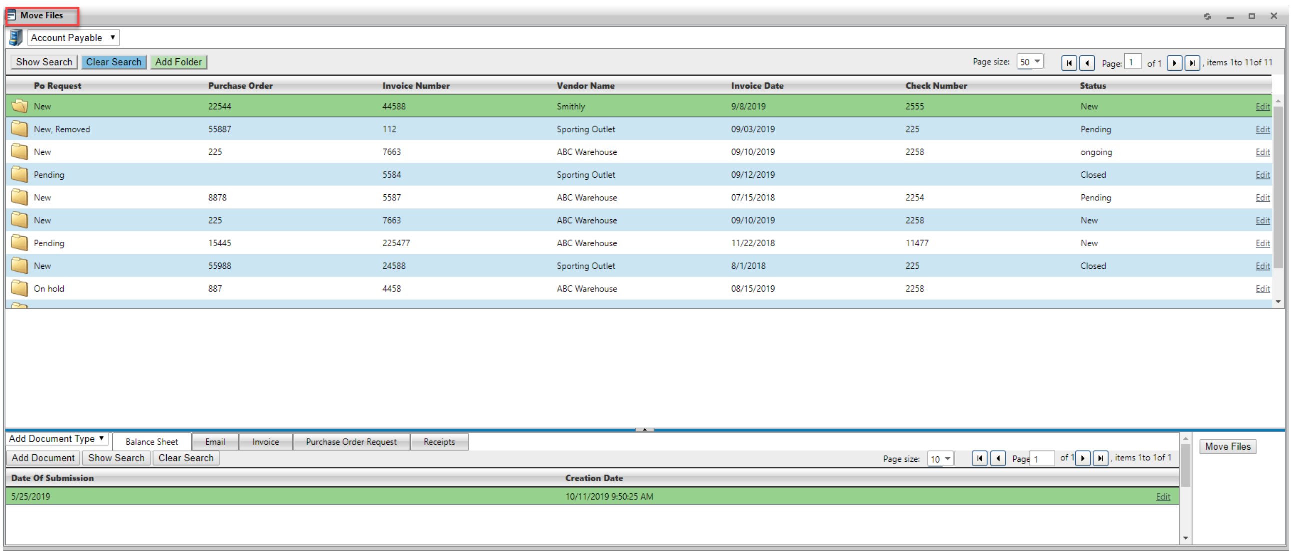
Selected files can be exported in PDF or ZIP format. When you choose multiple files for export a single PDF or ZIP file is created that contains all the selected files.

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.

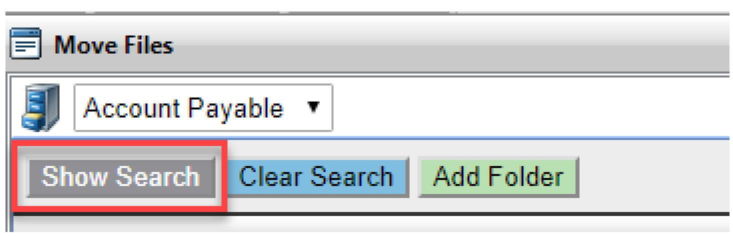
Moving Files

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

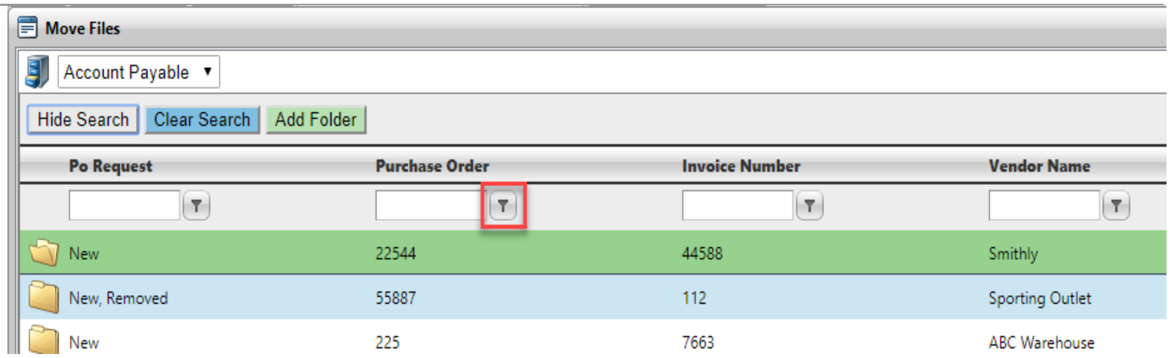
1. Select the check box next to each file you want to move.
2. Click the drop-down for the **Select a File Action** list, select **Move**. The Move Files window opens.



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:
   - To add the files to an existing folder in the cabinet: Click the **Show Search** button.



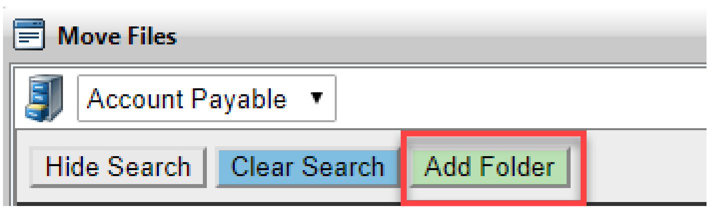
Enter your search criteria to find the folder and click the **Filter** button. The folders that meet your criteria are displayed in the search results. Click the folder where you want to move the files. For more information on searching in a cabinet, see page 24.



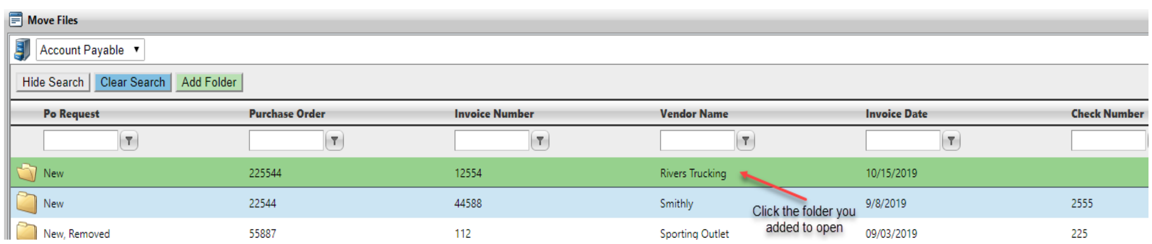
5. Select folder.

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.

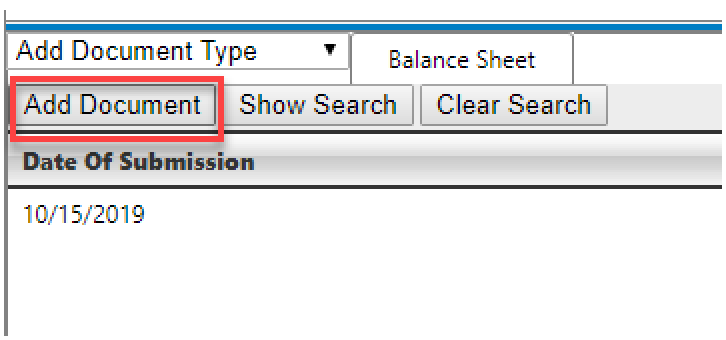


The Edit Form window opens. Complete the cabinet index fields and click **Insert**. The folder you created is displayed at the top of the folder grid. Click the folder to open it.



6. Do one of the following to select a document type for the files:

- To add the files to an existing document type in the folder: 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**.

- To add the files to a new document type: 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.

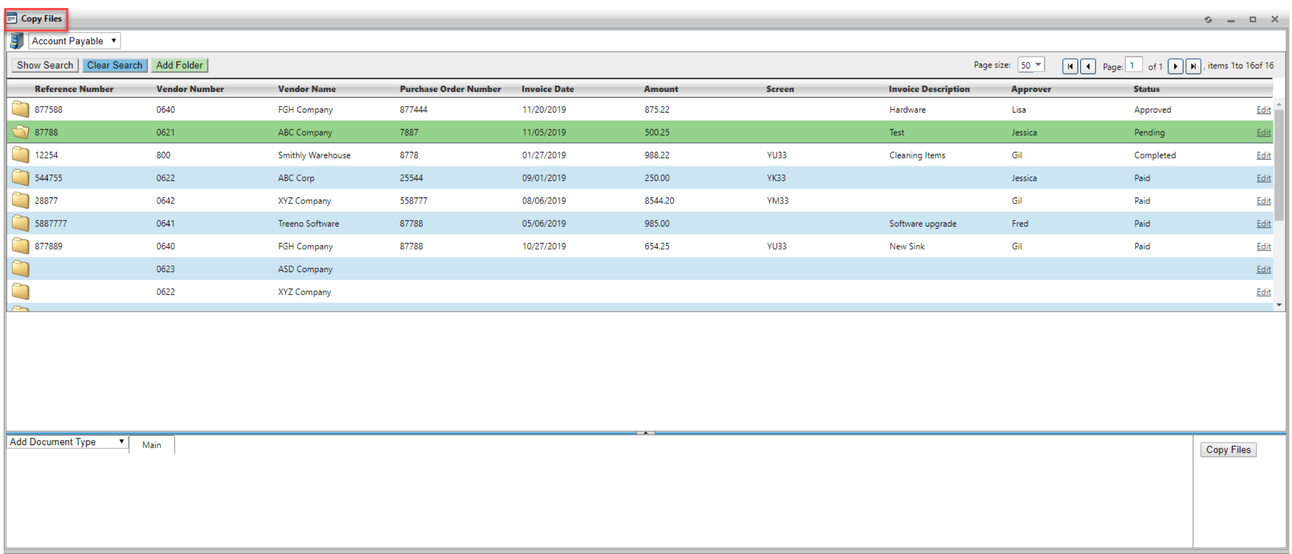
7. Click the **Move Files** button.

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

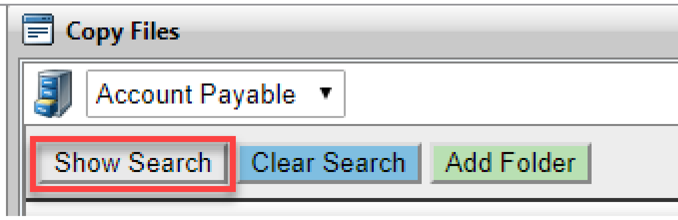
Copying Files

You can copy selected files to another folder or cabinet.

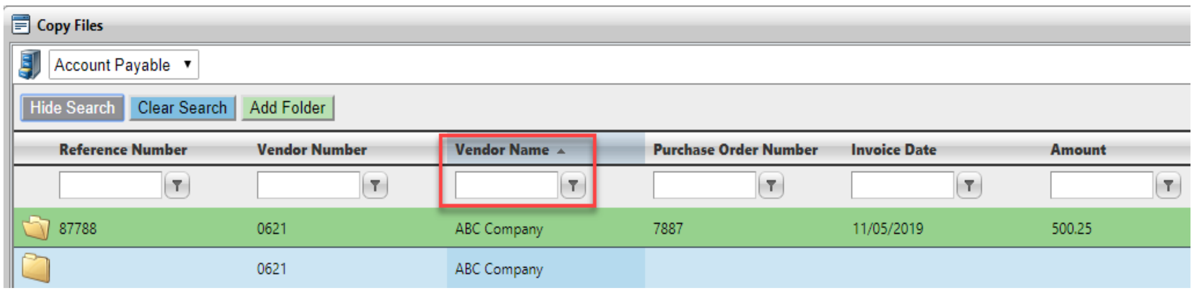
1. Select the check box next to each file you want to move.
2. Click the drop-down for the **Select a File Action** list, select **Copy**. The Copy Files window opens.



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.

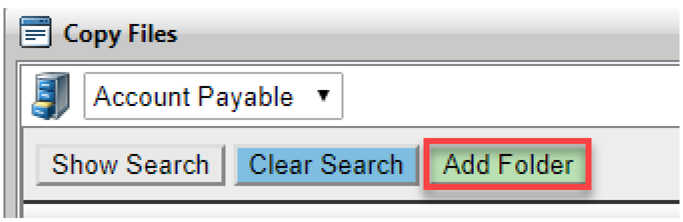


Enter your search criteria to find the folder and click the **Filter** button. The folders that meet your criteria are displayed in the search results. Click the folder where you want to copy the files. For more information on searching in a cabinet, see page 24.

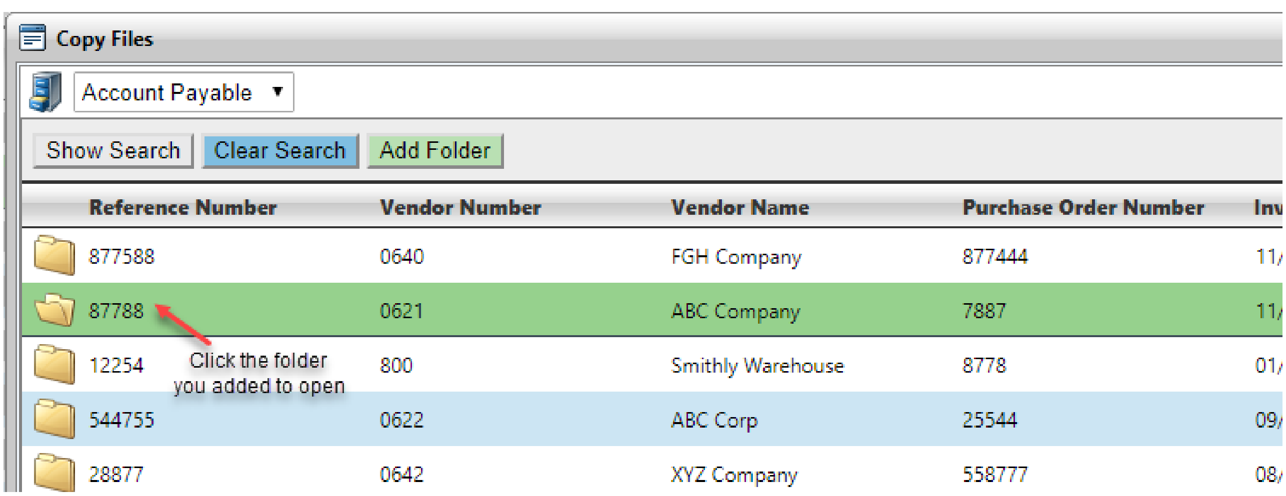


Note: Click the **Clear Search** button to once again display all the folders in the cabinet and hide the search criteria fields.

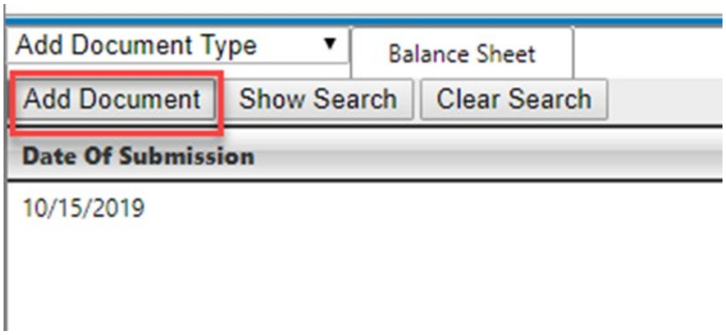
- To copy the files to a new folder: Click the **Add Folder** button.



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.



5. Do one of the following to copy the files to a document type:
   - To copy the files to an existing document type in the folder: 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**.

   - To copy the files to a new document type: 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.

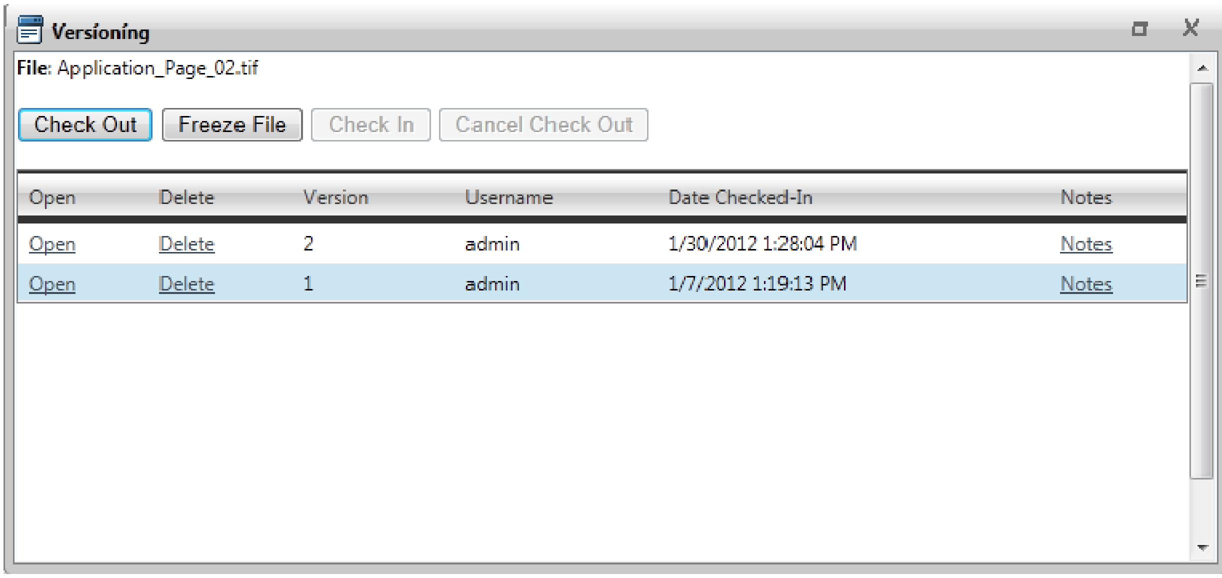
Checking Out a Document

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.



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

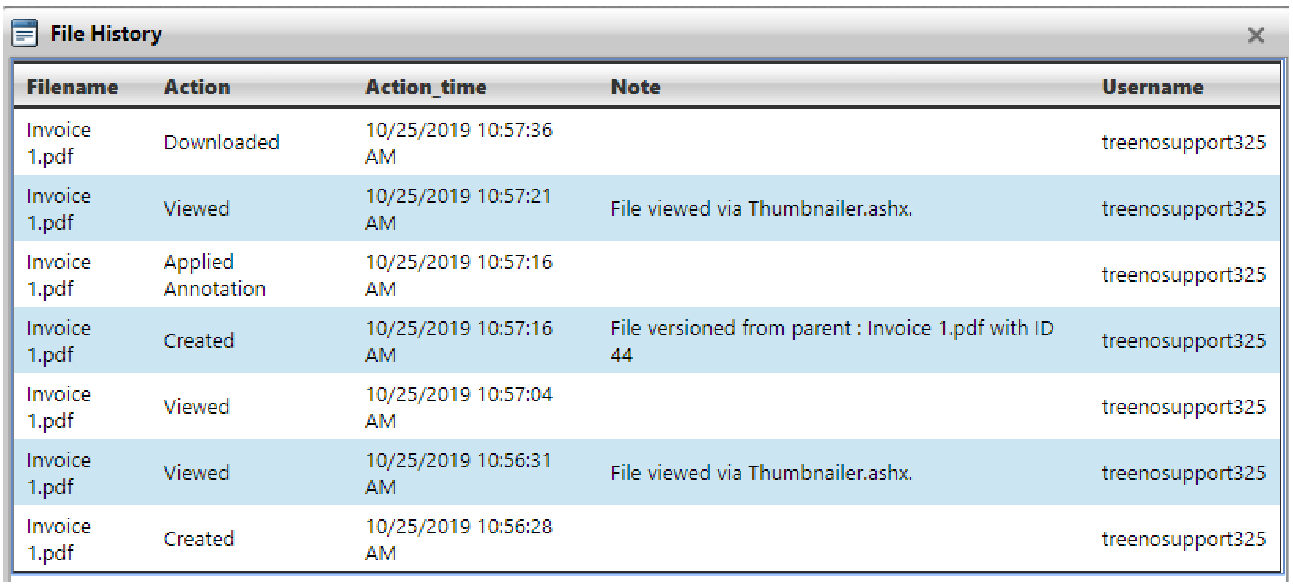
If a version of a document should no longer be maintained in your Treeno repository, you can delete it. Only users with the appropriate permissions can delete document versions.

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 History

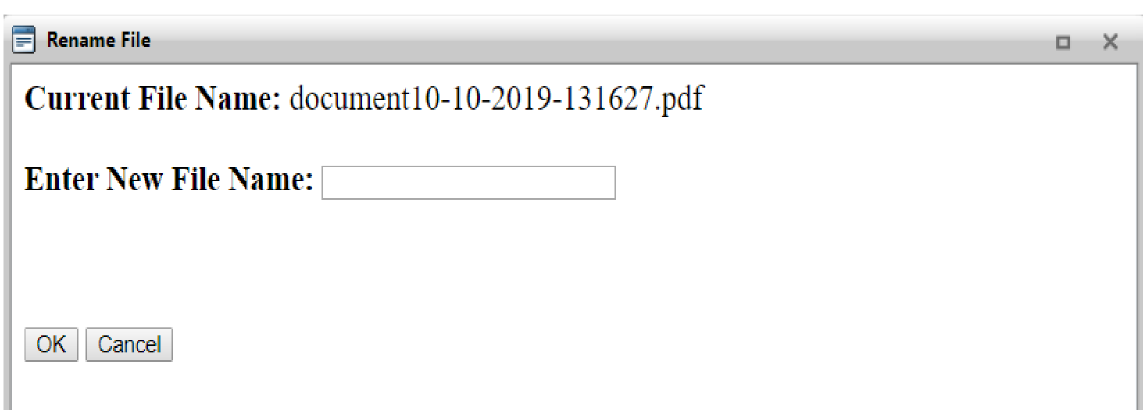
Filename	Action	Action_time	Note	Username
Invoice 1.pdf	Downloaded	10/25/2019 10:57:36 AM		treenosupport325
Invoice 1.pdf	Viewed	10/25/2019 10:57:21 AM	File viewed via Thumbnailer.ashx.	treenosupport325
Invoice 1.pdf	Applied Annotation	10/25/2019 10:57:16 AM		treenosupport325
Invoice 1.pdf	Created	10/25/2019 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.



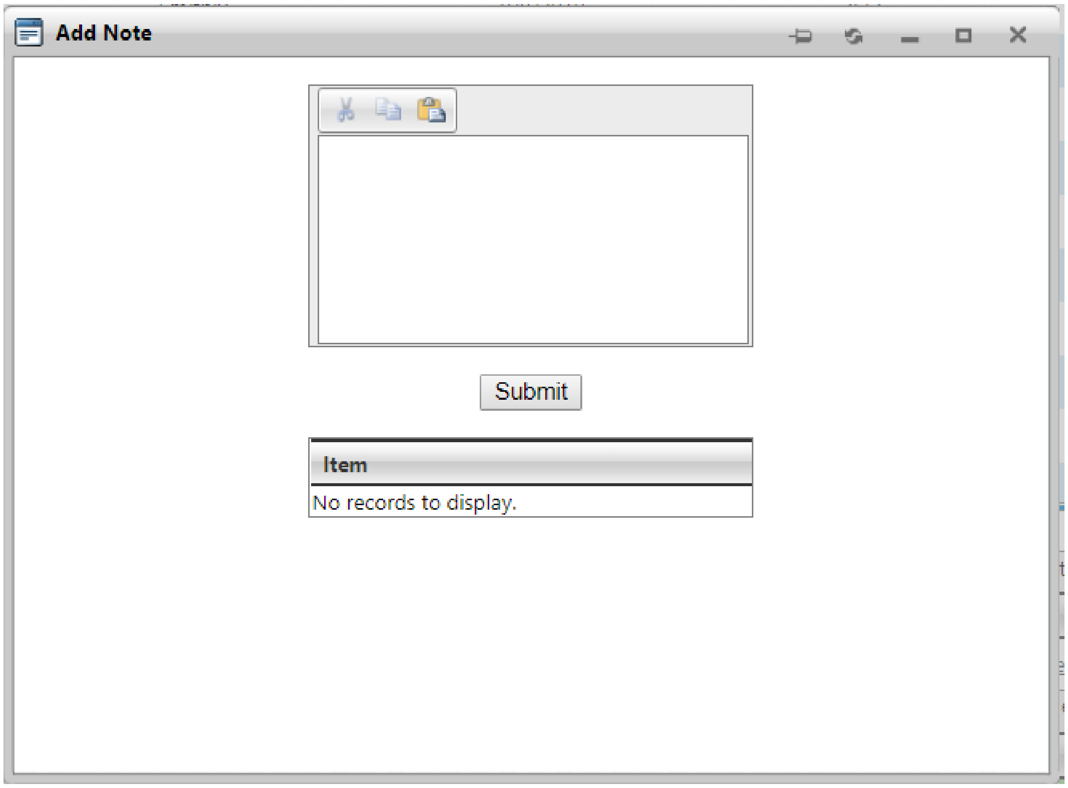
4. Click the Ok button to save the change.

Adding a Note

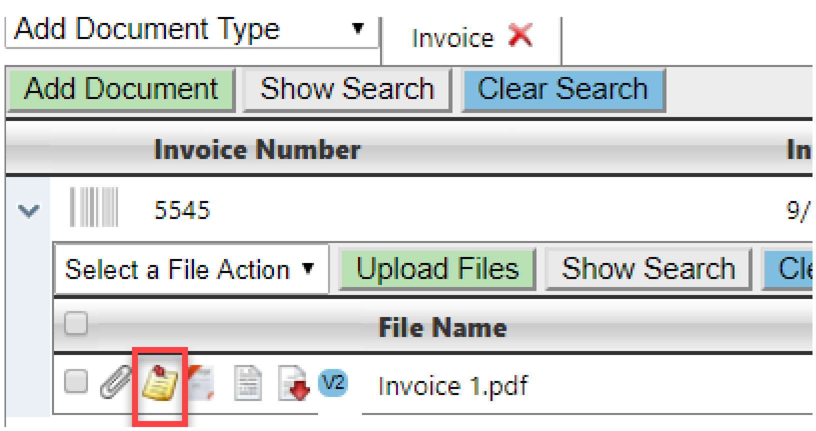
Add Note feature allows you to add a note to the file. The note will appear as an icon within the file tool icons. Once applied, any user can click the Notes icon to view the notes added.

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**.

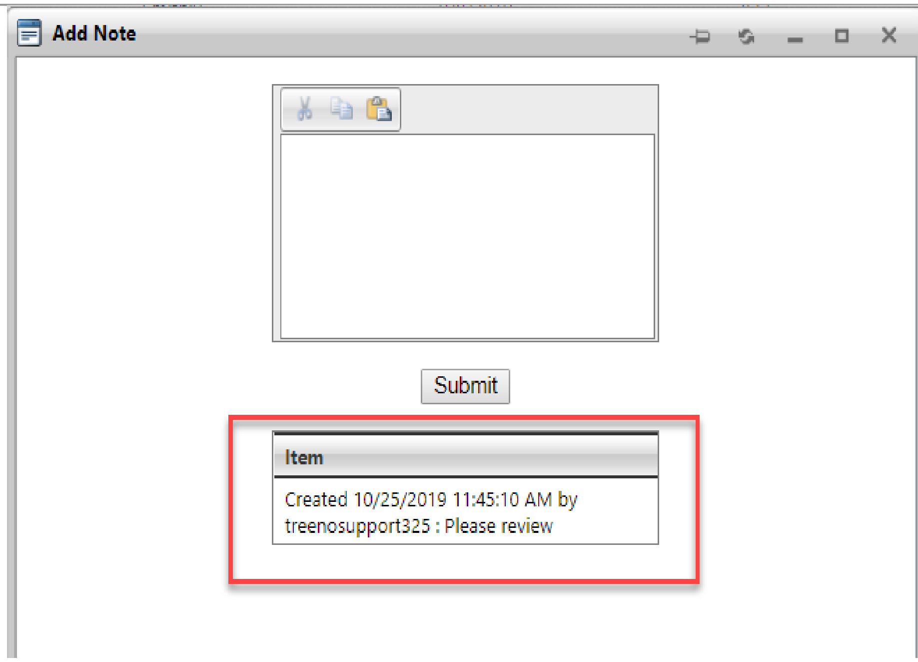
   The Add Notes window will Open.



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



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



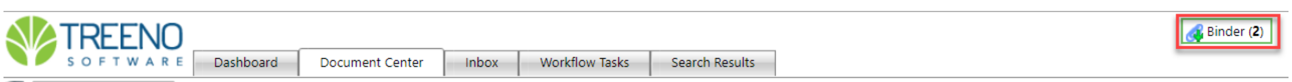
7. To close the window, click the X.

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.



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

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

Tool Button	Tool Name	Description
	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.
	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.

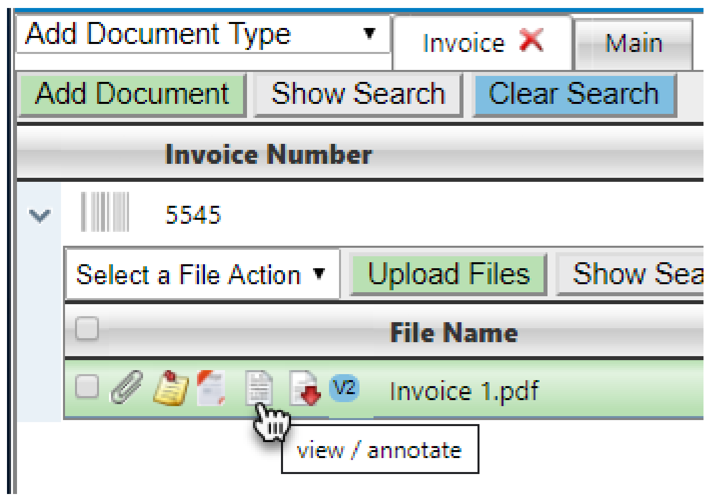
	Go to First Page	Displays the first page of a multi-page file.
	Go to Previous Page	Displays the previously viewed page in a multi-page file.
	Go to Next Page	Displays the next page in a multi-page file.
	Go to Last Page	Displays the last page of a multi-page file.
	Rotate Right	Rotates the image 90 degrees to the right.
	Rotate Left	Rotates the image 90 degrees to the left.
	Picture Controls	Can adjust brightness, contrast and Gamma.
	Crop	Can crop a section of the page
	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.
	Highlight Rectangle	Draws a transparent rectangle in the image for highlighting purposes.
	Redaction Area	Used for the redaction of text within the document.
	Sticky Note	Adds a “sticky note” to the image where you can enter additional information. The note text can be searched on.
	Text Edit	Allows for insert text in the image.
	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.
	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.
	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.



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

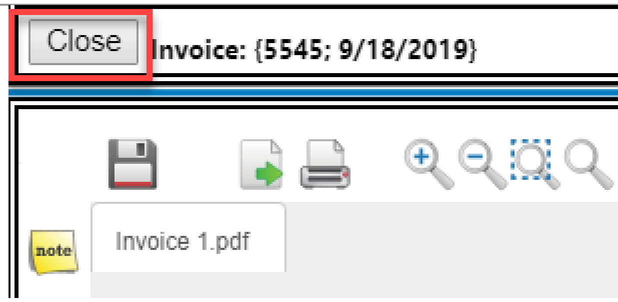
Saving and Closing Files

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** 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** - Resizes the image to the height of the viewer.
- **Fit to Width** - 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** - Moves to the first page in the file.
- **Go to Previous Page** - 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** to rotate the image 90 degrees to the right.
   - **Rotate Left** to rotate the image 90 degrees to the left.
2. Continue clicking the button until you reach the desired orientation.

Picture Controls

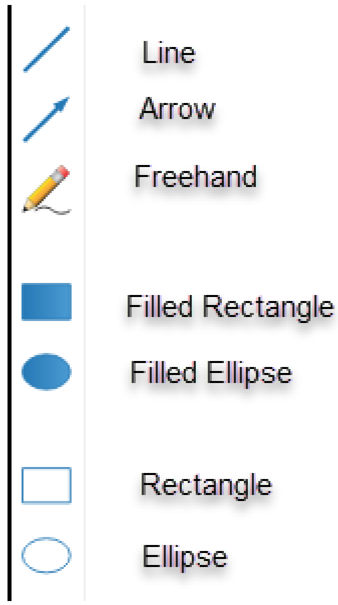
Click the Picture Control button to open the Picture Control window. Move the Brightness, Contrast of Gamma sliders to change the display of the document.

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.



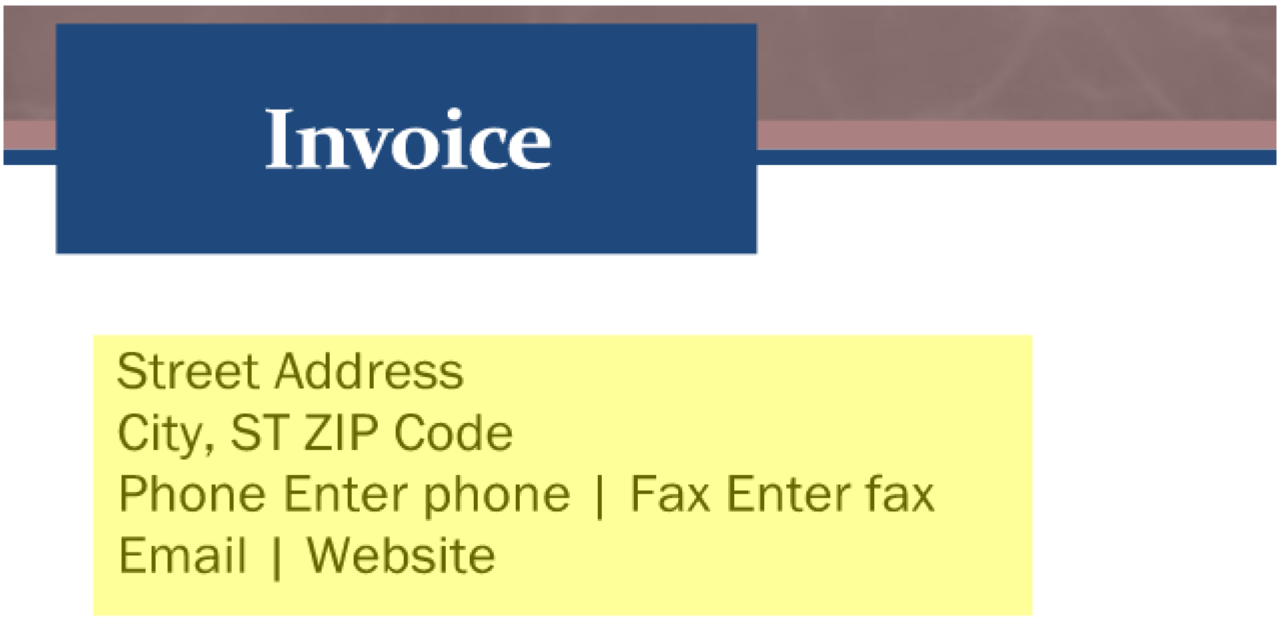
Filled shapes can be used to redact, or hide, confidential information in a document, such as a social security number or credit card number. When the document is moved through a Treeno workflow, the information remains secure and can only be viewed by users with the appropriate permissions.

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

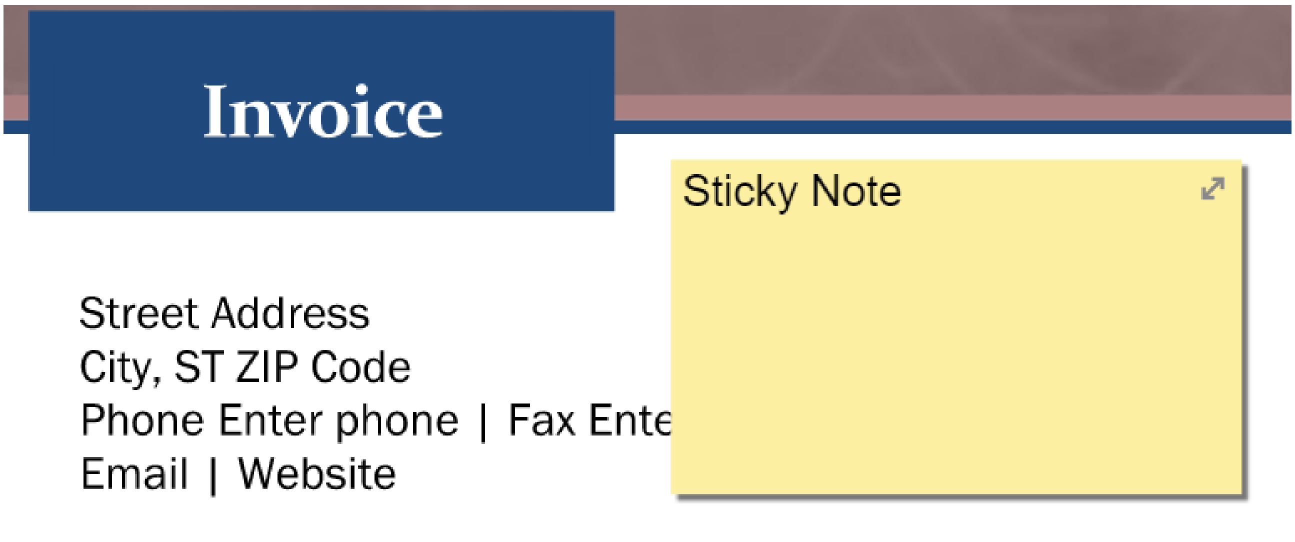
A highlighted rectangle draws attention to a selected area in a document without obscuring the text beneath it.



1. Click the **Highlight Rectangle** 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

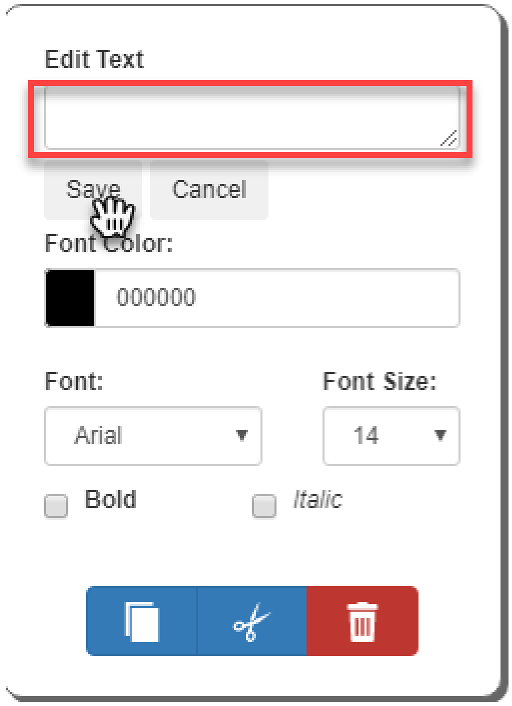
You can add a “sticky note” to an image that provides additional information you want other users to know about when they are working with the file.



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.



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

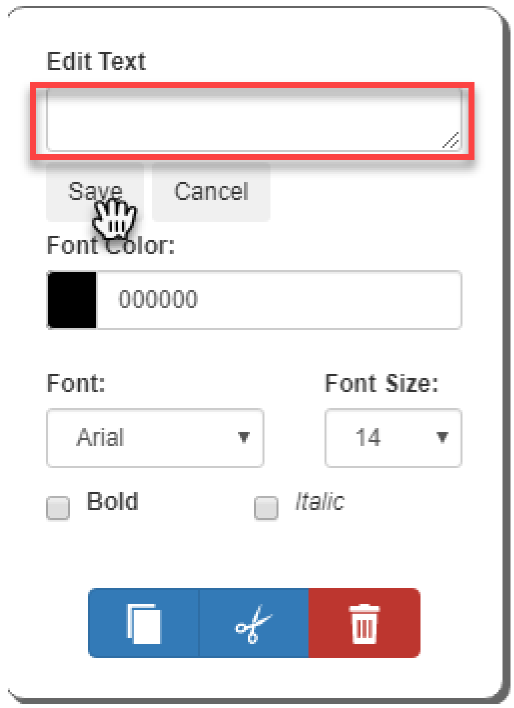
Text

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.



4. When you are finished, click the **Save Document** button.
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.

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

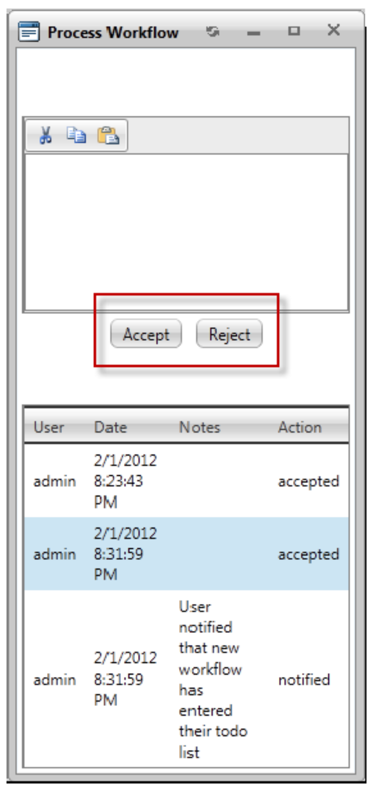
A Treeno workflow defines the steps required to perform a particular business process in your organization. Each of these steps, called *nodes*, describes a part of your logical document flow process. For example, you might have a node called Indexing, another called Manager Approval, and another called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

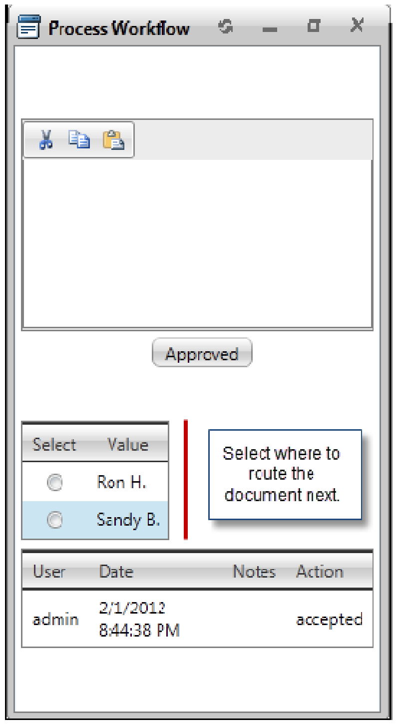
Signature

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.



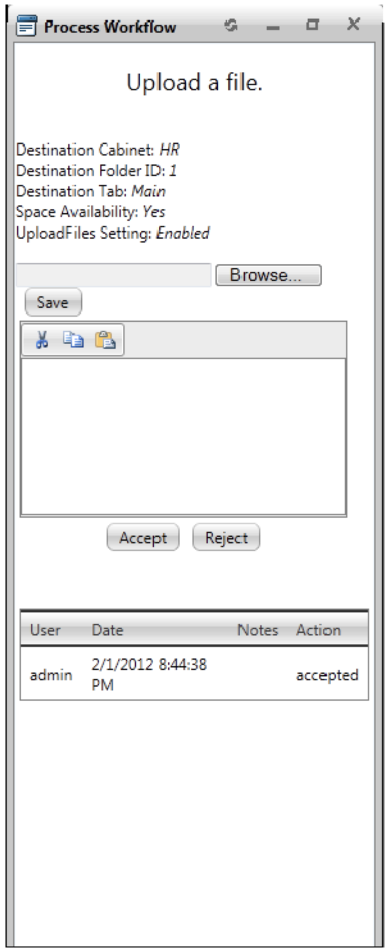
Value

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.



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.



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

Indexing

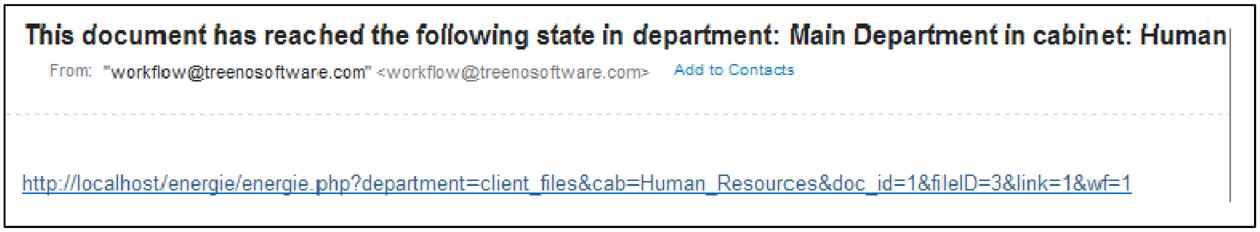
An indexing node prompts you to enter metadata, or index values, for a workflow task. When you open the document from the Workflow Tasks tab or an e-mail notification, the indexing viewer is displayed. After the index values have been entered, you can accept or reject the workflow task, and it is routed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

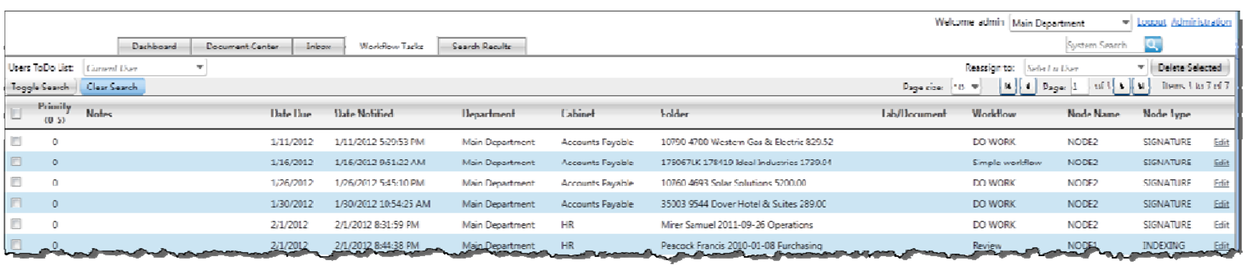
Each e-mail contains a link to the document. If the recipient is logged in to Treeno, clicking the link will take them directly to the workflow task. Otherwise, the recipient will be required to log in to the system before viewing the document.



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.



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

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.

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 **Edit** 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 **Edit** 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 **Edit** 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** 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.

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

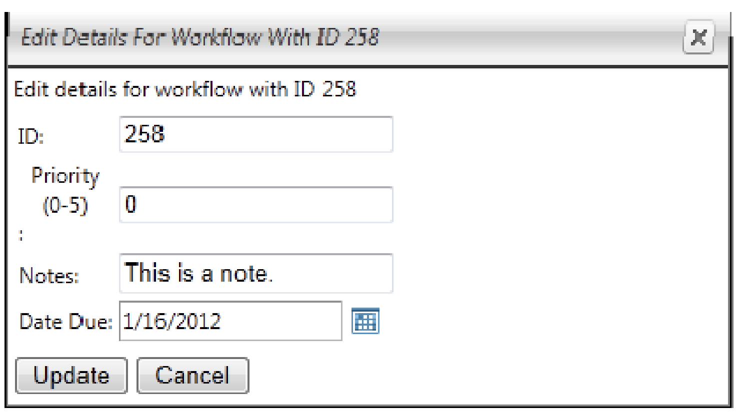
Using the Edit Details for Workflow window, you can edit the following information for a workflow task:

- **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.



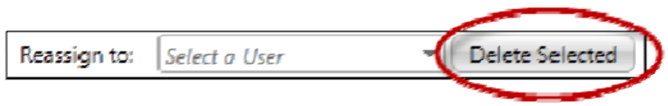
2. Enter the task priority and note details.
3. In the **Due Date** field, click the calendar icon to select the date or enter the date manually.

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.

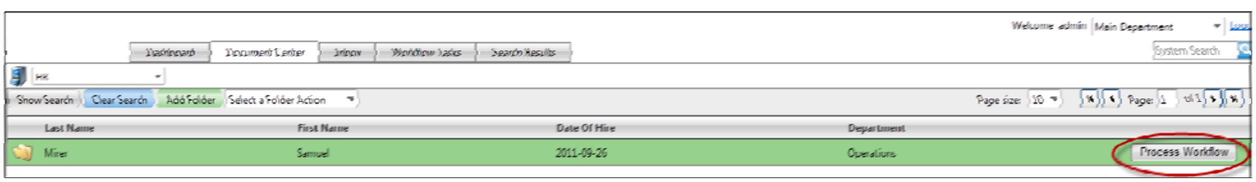


Processing a Workflow Task

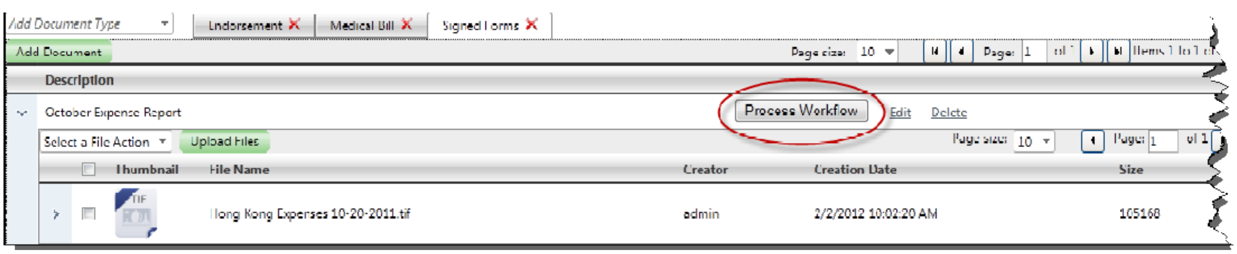
When a workflow task has been assigned to you, it is displayed on the Workflow Tasks tab. You must process the task as directed in order for it to continue to the next user in the workflow.

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).



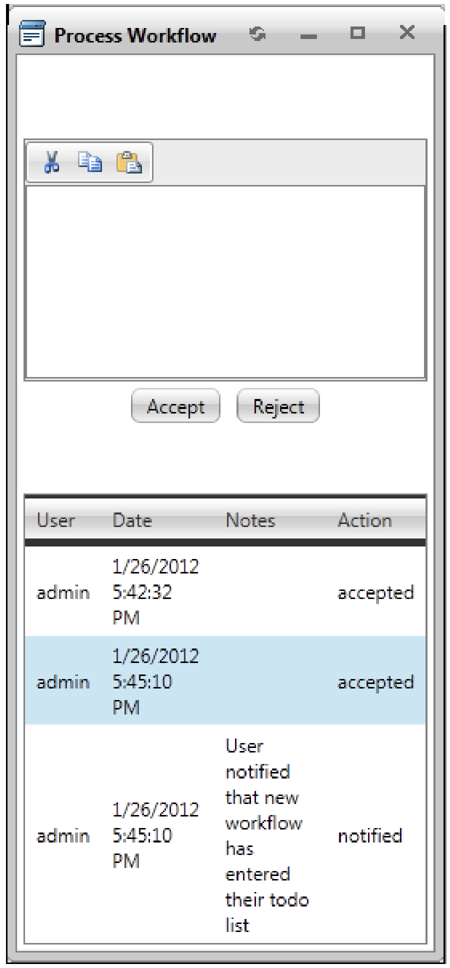
Workflow task for a folder



Workflow task for a document type

2. Click the **Process Workflow** button.

   The Process Workflow window opens.



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.

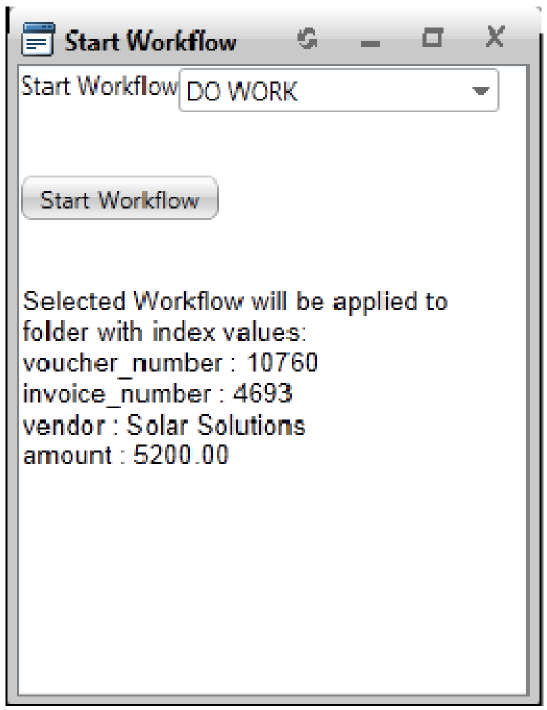
Starting a Workflow

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.



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.

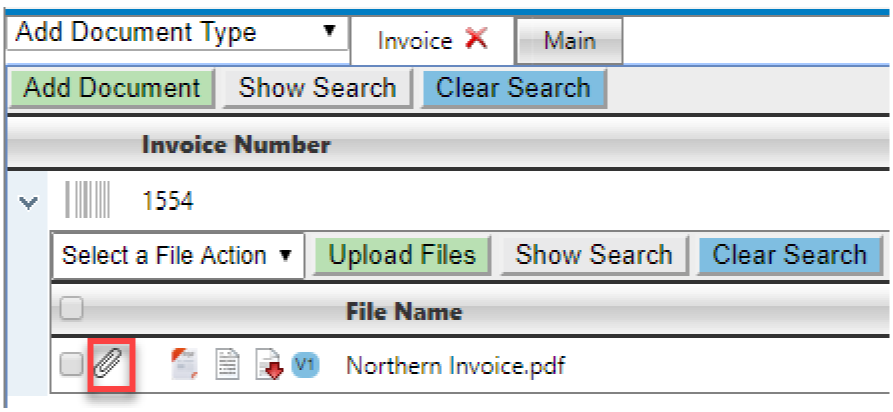
The message is updated when the workflow has successfully started.

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.

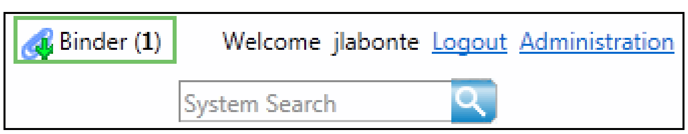
Note: The Treeno Document Binder is a permission-based feature of Treeno EDM. Additionally, you must have access to a cabinet in order to add any of its files to your binder.

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



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

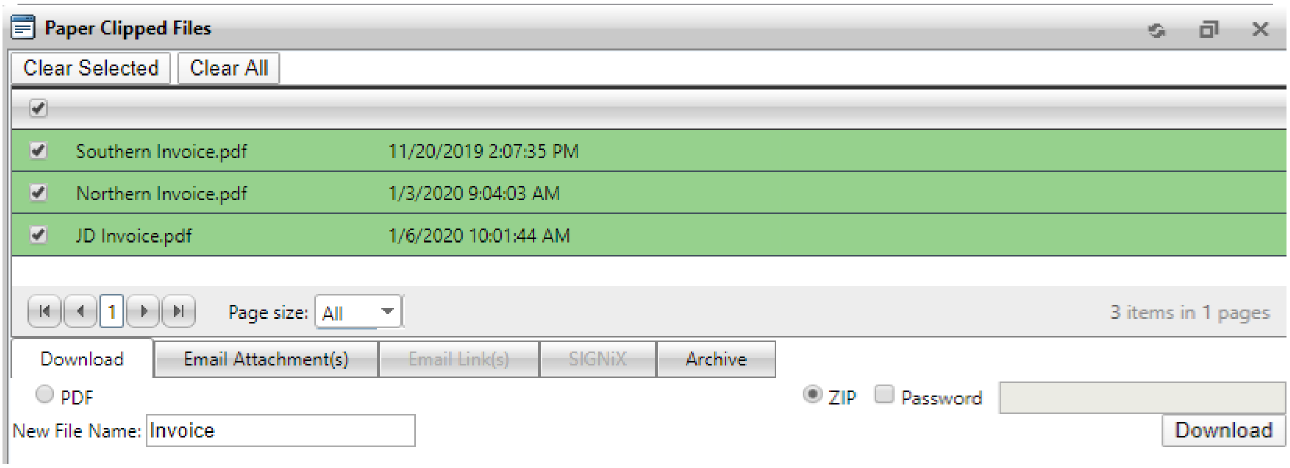
Your binder is always displayed at the top of the Treeno page. The number in parentheses indicates how many items are currently waiting to be processed.



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:

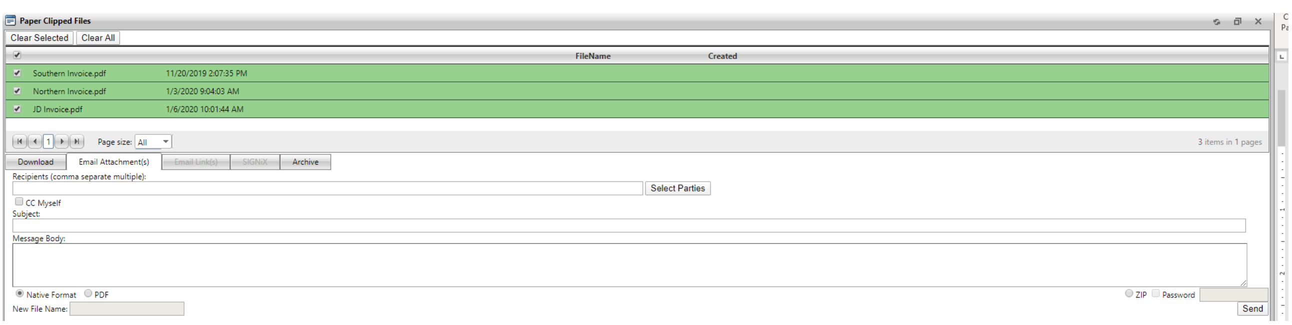
- **PDF** – Converts the documents to PDF format and merges them into a single PDF file.
- **ZIP** – Maintains the native format (TIF, JPG, PDF, Word, etc.) of each document and places them in a ZIP file.

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



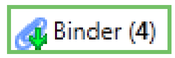
The following options are available on the **Email Attachments** tab:

- **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.



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 icon. The 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.



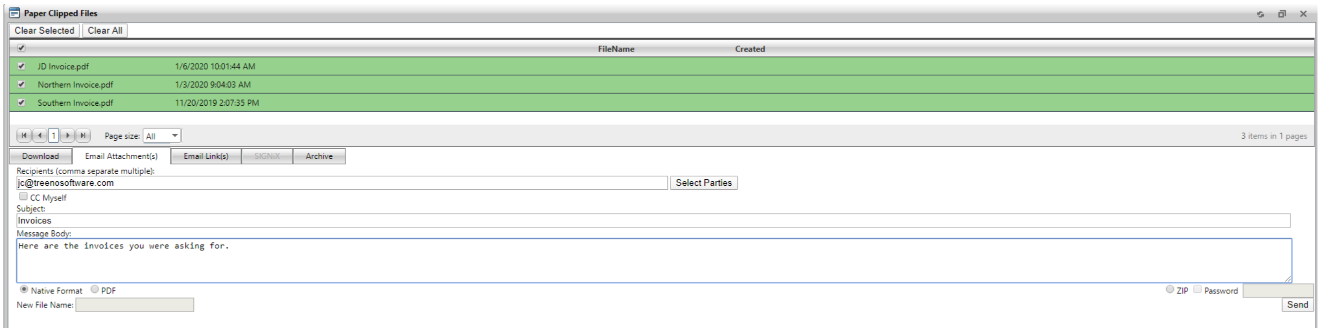
4. Repeat steps 1 – 3 to add additional documents to your binder, as needed.
5. When you are finished, click the **Binder** button to download or email your “paper-clipped” documents.

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

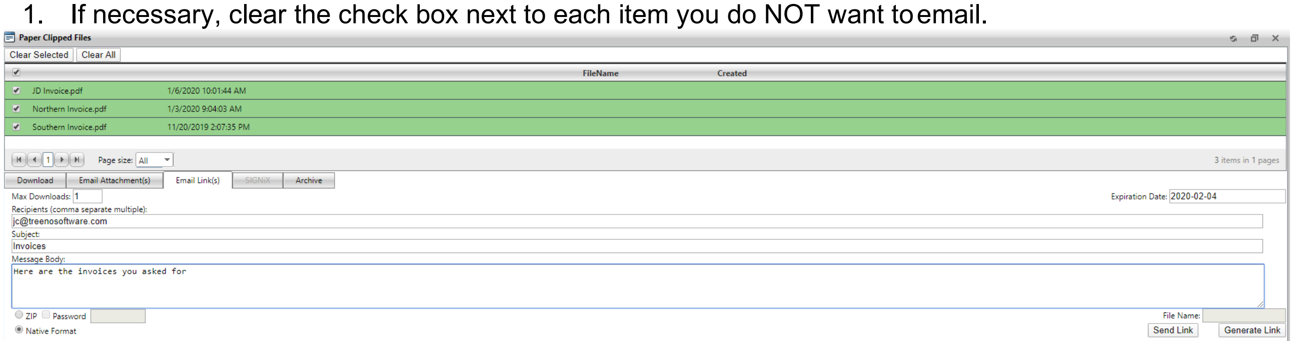
1. If necessary, clear the check box next to each item you do NOT want to email.



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.



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