TREENO ELECTRONIC DOCUMENT MANAGEMENT

Administration Guide

October 2018

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 users to access information without needing to install anything on their 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.

Barcode recognition and a powerful workflow engine automate the processing of scanned items. Any file type can be stored in Treeno and can be indexed with a wide range of metadata options based on your organization's needs. Filing structures, metadata, and document type fields can be easily set up and configured without any IT involvement.

Treeno EDM solution offers several 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 system and department administrators who have been charged with configuring and maintaining Treeno EDM. The guide provides overview information as well as step-by-step procedures to help administrators get Treeno up and running as quickly and efficiently as possible. The guide includes the following sections:

- Managing Security
- Working with Cabinets
- Using Document Types
- Managing Departments
- Managing System Information
- Indexing
- Managing Barcodes
- Setting Up Workflows
- Publishing
- Using the Recycle Bins
- Auditing
- Treeno Reports
- Burning Cabinet Data to CD

About Treeno

Established in 2002 and located in Portsmouth, NH, Treeno Software has grown to become a leader in the Electronic 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) by using our secure, reliable, and easy-to-use web-based EDM software solution.

Managing Security

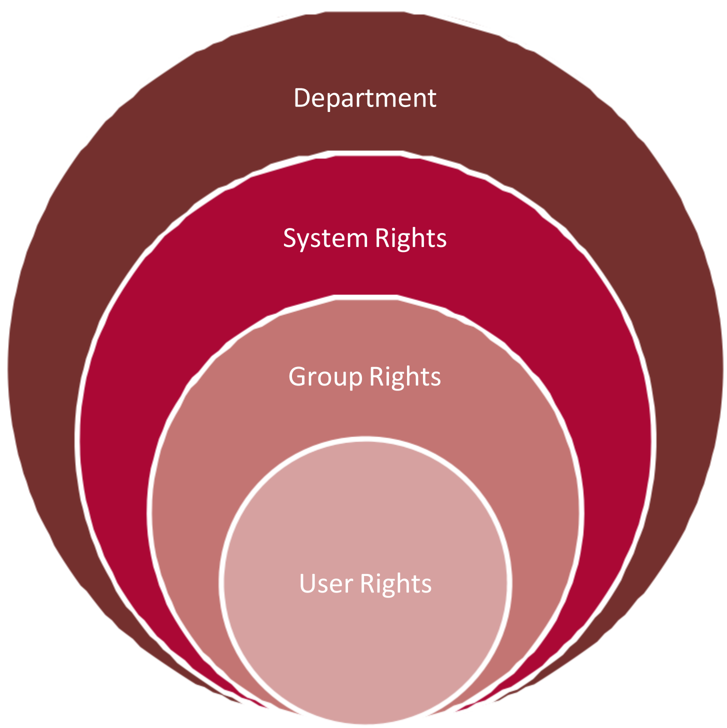
Treeno Security Overview

Treeno security lets you control who has access to different parts of the application and which actions they can perform. The permissions you set determine how users interact with cabinets, folders, and document types, as well as how they search, index, and publish.

You manage security in Treeno in the following ways:

- **At the department level** - All rights (system, group, and user) are assigned by department.
- **At the system level** – Set global permissions that apply to all groups within a department.
- **At the group level** - The most efficient way to manage security because you only need to set up security permissions once for multiple users.
- **At the user level** – If necessary, you can set permissions for individual users; however, it is recommended that you set security at the group level whenever possible.

The following figure illustrates the Treeno security hierarchy:



You control access to your organization's data by defining different departments (for example, Accounts Payable, Accounts Receivable, Human Resources, and so on). Each department typically has access to a single database and is managed by a department administrator. When you assign users to a department, you give them rights to that database. When appropriate, a user can be assigned to multiple departments.

Administrator Access Levels

There are two administrator access levels in Treeno: system administrator and department administrator. The access level determines the types of tasks that can be performed.

Access Level	Access Rights
System Administrator	Can access all areas of the application **across departments**. This includes creating, modifying, and deleting all users, cabinets, workflows, folders, document types, etc. Can create and modify departments and department administrators. Can permanently delete all files and folders from the system. Typically, a single user is assigned the system administrator access level, as determined by your Treeno implementation: • **Treeno SaaS** – Your Treeno support representative • **Treeno Document Server** – Your in-house system administrator
Department Administrator	Can access all areas of the application **within a department**. This includes creating, modifying, and deleting a department's users, cabinets, workflows, folders, document types, and so on. Cannot create a new department. Cannot modify another department administrator's access rights. Can permanently delete files or folders from the system within their department. A single department can have multiple department administrators.

Security Rules and Recommendations

Keep in mind the following rules and recommendations when you are configuring Treeno security:

- All rights are assigned by department. This includes system, group, and user permissions.

- Rights are inherited. By default, rights are inherited from the next higher level. Groups, therefore, inherit rights set at the system level, and users inherit rights set at the group level.
- System and group rights can be overridden at the user level. It is easier to manage your system at the group level and then override those permissions at the user level only when necessary.
- During the initial setup of your Treeno system, the system-level default permissions provide a basic level of access for users. Modify those permissions at the group level to meet your organization's needs.
- You should create a view-only group that prevents selected users from adding, editing, or deleting information.

Setting System Preferences

System preferences define default permissions for all groups. You can override some of these global settings for individual groups or users, as needed.

Note: Department administrators can only set system preferences within their own department.

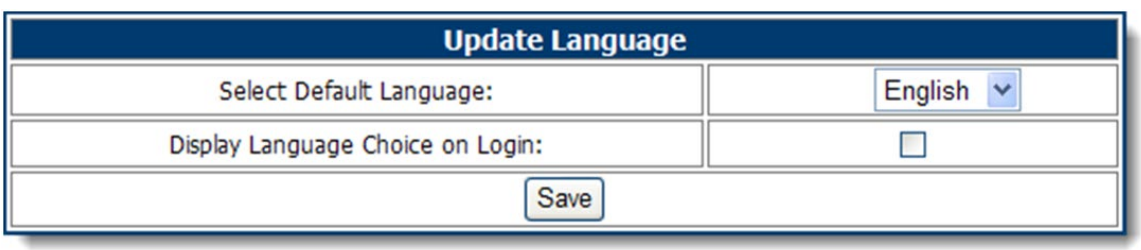
Selecting the Default Language

You can set the default language for your Treeno system. If you are configured to use multiple languages, you can provide users with a choice of languages when they log in.

To set the default language

1. Click the **System Preferences** tab.
2. Click **Update Language**.

   The Update Language page opens.



3. Select the language you want to use as the default.
4. If you want users to have a choice of languages, select the **Display Language Choice on Login** check box.
5. Click **Save**.

Setting System-Level Advanced Folder Options

Setting advanced folder options at the system level determines how all users view and work with the documents in your Treeno system. This section explains how to apply folder settings globally across all cabinets. You can, however, set folder preferences for individual cabinets (see page 43).

Note: Groups inherit system-level folder permissions. If necessary, you can override these permissions at the group or user level.

To set advanced folder options

1. Click the **System Preferences** tab.
2. Click **Advanced Folder Settings**.

   The Advanced Folder Settings page opens.

3. In the **Settings For** drop-down list, select **System**.

4. In the **View By** drop-down list, select **Global** to set system permissions for all cabinets.
5. Next to each setting, select **Enabled** or **Disabled**.
   - **Enabled** – Allows all users to perform the action.
   - **Disabled** – Prevents all users from performing the action.

Note: System options that are highlighted have been changed at the group or user level.

6. Click **Save**.

Advanced Folder Options

The following table describes each of the advanced folder options:

Advanced Folder Option	Description
Add/Edit Folders	Add or modify cabinet folders.
Add/Edit Tabs	Not currently in use.
Add Documents	Add a document type tab within a cabinet folder. You can then upload a file to this type.
Allow Versioning Access	Check out a document from the system, make modifications to the document outside of Treeno, and then check in the document as a new version.
Delete Documents	Delete document types in folders.
Delete Files	Delete files in folders.
Delete Folders	Delete folders from cabinets.
Edit Documents	Change document type index values.
Edit File Names	Change the name of an uploaded file. The file extension cannot be changed.
Get as PDF File	Convert a TIFF or JPEG file to PDF.
Get as ZIP File	Zip and download a file to a selected location.
Move Files	Move a selected file to a different folder or cabinet. The file can be cut and pasted into the new location or copied into the new location.
Publish Document	Publish a selected document to a central portal.
Publish Folder	Publish all documents in the folder to a central portal.
Redact Files	Redact (annotate) a selected file.

Advanced Folder Option	Description
Reorder Files	Change the order of selected files in a folder.
Save Files	Download a selected file.
Show Barcode Link	Print a barcode sheet for a selected folder or document type.
Show Workflow Icons	Assign a folder or document to a selected workflow.
Upload Files	Import a file into the Treeno system.
Versioning Prefix for Plug-in Integration	Attach the required prefix to documents that are versioned.
View Original of Redacted Files	Display redacted information as a transparency. Allows authorized users to view redacted information in a document.

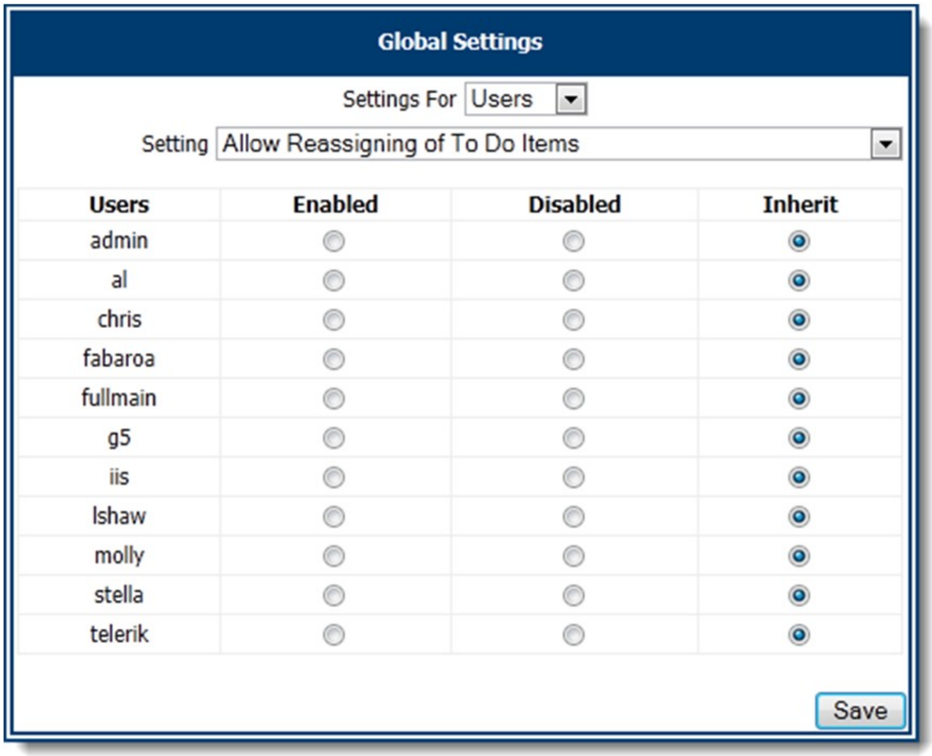
Setting Global Permissions

You can set additional global permissions that apply to the entire Treeno system or to individual users within the system. Examples of global permissions include: Allow Reassigning of To Do Items, Enable/Disable Inbox Workflow, and Display Department Name. These global permissions should be set in conjunction with the system-level folder options (see previous procedure).

To set global permissions

1. Click the **System Preferences** tab.
2. Click **Global Settings**.

   The Global Settings page opens.



3. Select to how you want to configure the global settings: for the **System** or for **Users**.
4. Select the appropriate setting.
5. Do one of the following:
   - If you are configuring settings for the entire system, select **Enabled** or **Disabled**, as appropriate.
   - If you are configuring settings for individual users, select **Enabled**, **Disabled**, or **Inherit** (the user automatically inherits the setting from the system level).
6. Click **Save**.

The following table describes each global setting:

Global Setting	Description
Allow Access to All Cabinets for Printing Workflow Barcodes	Allows a user to access any cabinet to print a barcode that triggers a workflow. If the user has not been granted access to that cabinet, the user's rights are restricted to scanning documents into the cabinet. The user cannot access the cabinet data.

Global Setting	Description
Allow Access to All Users in Personal Inbox	Allows a user to view all other users' inboxes and move documents from any inbox to another location. Because security is decreased when this setting is enabled, it should only be used with a close group of users who are collaborating frequently.
Allow Access to Personal Inbox for All Users in a Group	Allows a user to view the inboxes of other users in the same group. Documents can be moved from a group member's inbox to another location.
Allow Access to Versioning Report	When enabled, provides system and department administrators with access to the Versioning report (see page 130). Users who are not administrators do not have access to this report.
Allow Reassigning Tasks for All Users in Group	Allows a user to view the workflow tasks of other users in the same group and reassign workflow items in those lists.
Allow Reassigning of To Do Items	Allows a user to view the workflow tasks of all other users and reassign workflow items in those lists. Because security is decreased when this setting is enabled, it should only be used with a close group of users who are collaborating frequently.
Allow Self Audit	Allows a user to search on their own activities using the Audit Table command on the Audit tab (see page 124). If this setting is disabled, the user cannot audit themselves at all unless they are a system or department administrator.
Delete from Personal Inbox	Allows a user to delete items from their own inbox. Items are sent to the recycle bin where they can then be purged or restored.
Delete from Public Inbox	Allows a user to delete items from the public inbox. Items are sent to the recycle bin where they can then be purged or restored.
Display Department Name	Displays the department name at the top of the Treeno EDM Home page. If the user has access to multiple departments, a **Department** drop-down list is displayed, allowing the user to switch between departments.
Enable/Disable Inbox Workflow	When enabled, allows users to start a workflow for a document (see page 96).

Global Setting	Description
Force Published Searches to Expire	Controls the length of time a document is published and accessible to an external user. When this option is enabled, the **Expiration** options become available in the Publishing Wizard (see page 108).
Force Publishing Default Expire Time	Indicates that a published document will no longer be available to an external user after the default expiration period has passed. You set the default expiration time using the **Set Publishing Expiration Time** command on the **Publishing Functions** tab (see page 108).

Setting the Default Settings Page

You can indicate which page you want shown when the user clicks the Settings toolbar button. By default, the License Information page is shown.

To set the default Settings page

1. Click the **System Preferences** tab.
2. Click **Default Settings Page**.
3. Select which page to show: **Cabinet Information**, **License Information**, **Print User Barcodes**, or **Unprocessed Barcodes**.
4. Click **Save**.

Setting Password Rules

When a user is prompted to reset their password (see page 32), they must follow certain rules to create a strong password that promotes a secure system. You define these rules using the Password Restrictions command.

To set password rules

1. Click the **System Preferences** tab.
2. Click **Password Restrictions**.

   The Password Restrictions page opens.

3. To require users to adhere to password rules, select the **Turn Password Restrictions On** check box.
4. To require users to change their initial password the first time they log in to Treeno, select the **Require All Users to Change Password** check box.
5. Select a minimum password length and indicate which elements must be included in the password: alpha characters, numbers, and/or special characters.
6. To require users to change their password on a regular basis, select the appropriate period (every 30 days, 60 days, etc.).
7. Click **Save**.

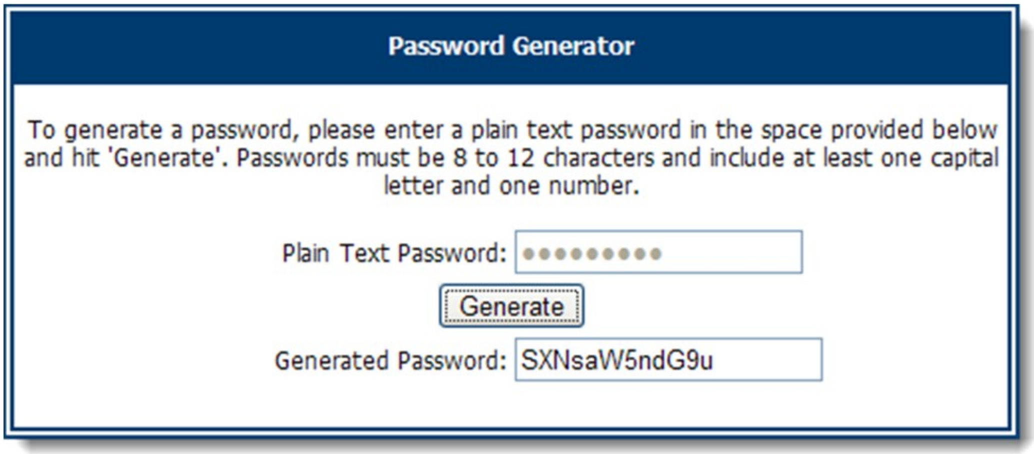
Generating a DMS Password

If your organization connects to a third-party database that is external to the Treeno system, you may be required to generate a DMS password to connect to that database. This password is encrypted and passed to the database in a configuration file rather than a plain text file.

To generate a DMS password

1. Click the **System Preferences** tab.
2. Click **Generate DMS Password**.

   The Password Generator page opens.



3. Enter the plain text password.
4. Click **Generate**.

   The password is encrypted and displayed in the **Generated Password** field.

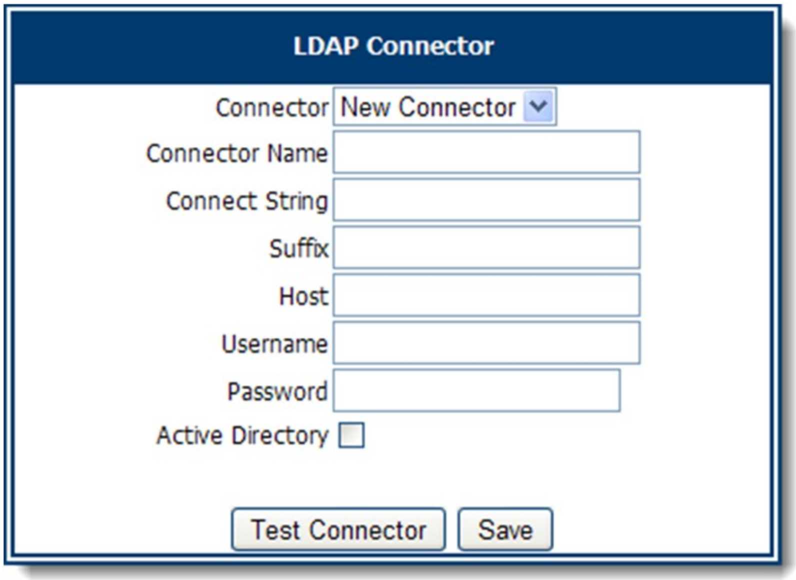
Setting Up an LDAP Connection

If you have an LDAP (Lightweight Directory Access Protocol) or Active Directory server on your network, you can use it to authenticate users in Treeno. You should set up your LDAP connector before importing users into the system. Otherwise, you will need to associate each user account individually with the LDAP connector.

To set up an LDAP connection

1. Click the **System Preferences** tab.
2. Click **LDAP Connector**.

   The LDAP Connector page opens.



3. Enter a name for the connector.
4. Leave the **Connect String** field blank.
5. In the **Suffix** field, enter your domain (for example, treenosoftware.com). For large networks that use sub-domains, you may also need to enter a suffix (for example, developers.treenosoftware.com).
6. In the **Host** field, enter the full name or IP address of the LDAP/Active Directory server.

Note: Typically, the **Username** and **Password** fields are left blank unless authentication is required to access the LDAP server.

7. Select the **Active Directory** check box if that is what you are connecting to.
8. Click **Save**.
9. To verify your connection, click **Test Connector** and enter the user name and password of a user on the LDAP server. If the connection is successful, a "Test Passed" message displays.

Import/Export Department

A department structure consists of cabinets, groups, users, and document types. To save time, you can export this structure from one department and import it into another department that you have just created.

Note: The department structure does not include folders, files, or metadata.

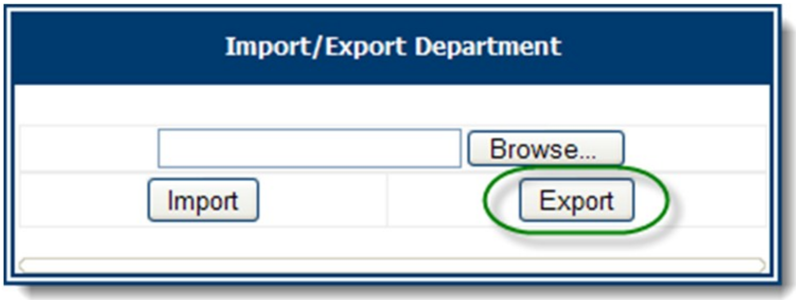
To copy a department structure

1. Create a new department (see page 58).
2. From the **Department** drop-down at the top of the Treeno window, select the existing department whose structure you want to export. You must open the existing department before you can export its data.

Note: The Department drop-down is a global setting that you must enable to display in the Treeno window (see page 17). Users who have access to only one department will see the department name at the top of the window, but a drop-down will not be displayed.

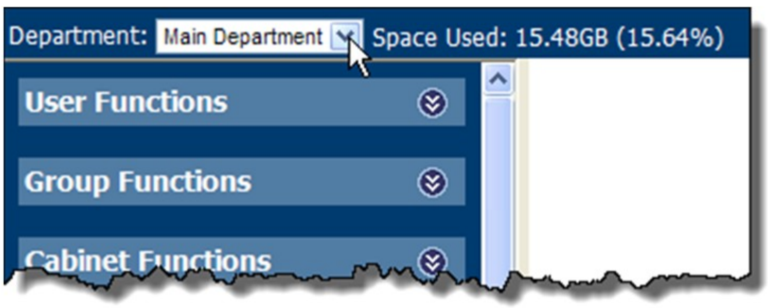
3. Click the **System Preferences** tab.
4. Click **Import/Export Department**.

   The Import/Export Department page opens.



5. Click **Export**.

   The File Download dialog box opens.
6. Click **Save** to save the dt_export.json file, which contains the exported structure data.
7. Navigate to the location where you want to save the file and click **Save**.
8. From the **Department** drop-down, select the new department you created in step 1.



9. On the **System Preferences** tab, **click Import/Export Department**.
10. Click **Browse** to open the dt_export.json file.
11. Click **Import**.

    The structure data is copied to the new department.

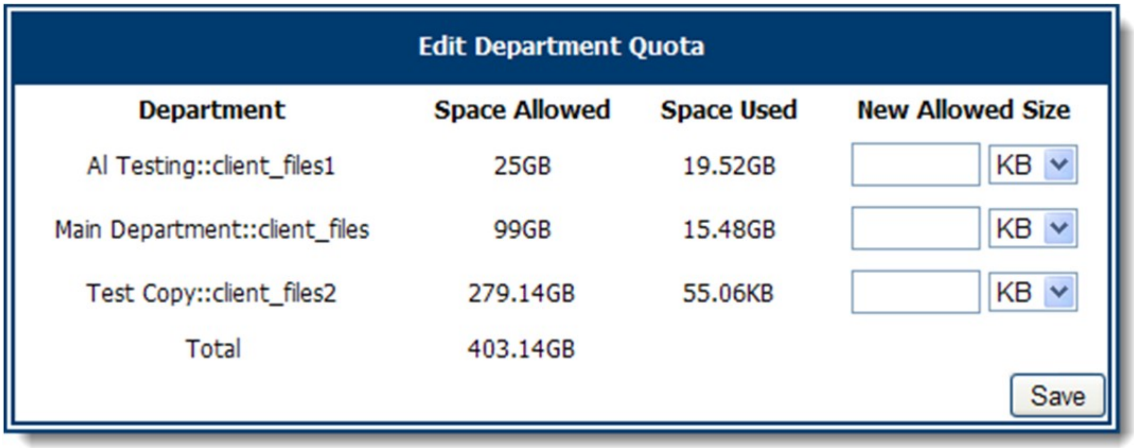
Setting the Department Quota

You can set the hard drive quota for each department. This quota indicates how much space can be used by members of the department. By default, the space allowed is determined by the database itself, but you can specify a different quota that does not exceed the default.

To set the department quota

1. Click the **System Preferences** tab.
2. Click **Edit Department Quota**.

   A list of the departments you have access to is displayed.



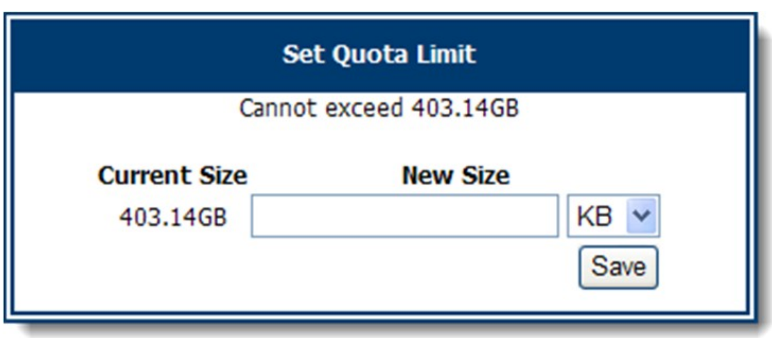
3. Next to each applicable department, enter a new allowed size and select the appropriate unit.
4. Click **Save**.

Setting the System Quota Limit

You can define the overall hard drive quota for your Treeno system. This is the amount of space available to all departments in your organization. The default size is set at installation.

To set the system quota limit

1. Click the **System Preferences** tab.
2. Click **Set Quota Limit**.



3. Enter a new size and select the appropriate unit.
4. Click **Save**.

Managing Groups

Groups allow you to manage security efficiently because you only need to set up permissions once for multiple users. For each group that you manage, you need to assign users and establish rights to cabinets, folders, document types, and documents.

By default, system rights determine group rights. You can override these rights for individual groups. If necessary, you can also override group rights at the user level (see page 35).

Note: Department administrators can only create, modify, and delete groups within their own department.

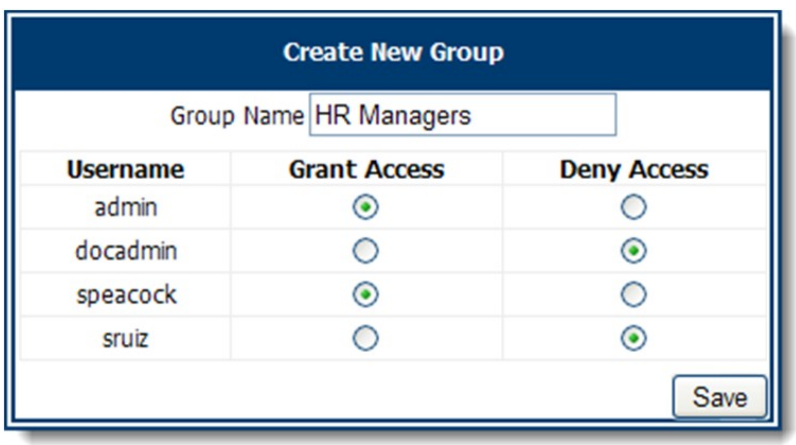
Creating a New Group

When you create a new group, you assign users to it and specify the type of access the group has to each cabinet in your organization.

To create a new group

1. Click the **Group Functions** tab.
2. Click **Create New Group**.

   The Create New Group page opens.



3. Enter the name of the group.
4. For each user you want to assign to the group, click the **Grant Access** option.

   Note: To remove a user from a group, select the **Remove Access** option.

5. Click **Save**.

   The Group Cabinet Permissions page opens.

6. For each cabinet, select the access level you want to assign to the group:
   - **Read/Write** – The group can modify the cabinet's search values and add new folders.
   - **Read Only** – The group can view the cabinet information but cannot make any modifications or add folders.
   - **None** – The group has no access to the cabinet. The cabinet will be hidden from the group's view.
7. Click **Save**.

Assigning Document Type Permissions

Your organization may use dozens of different document types to classify your stored documents. Not every Document Type, however, should be accessible to all users.

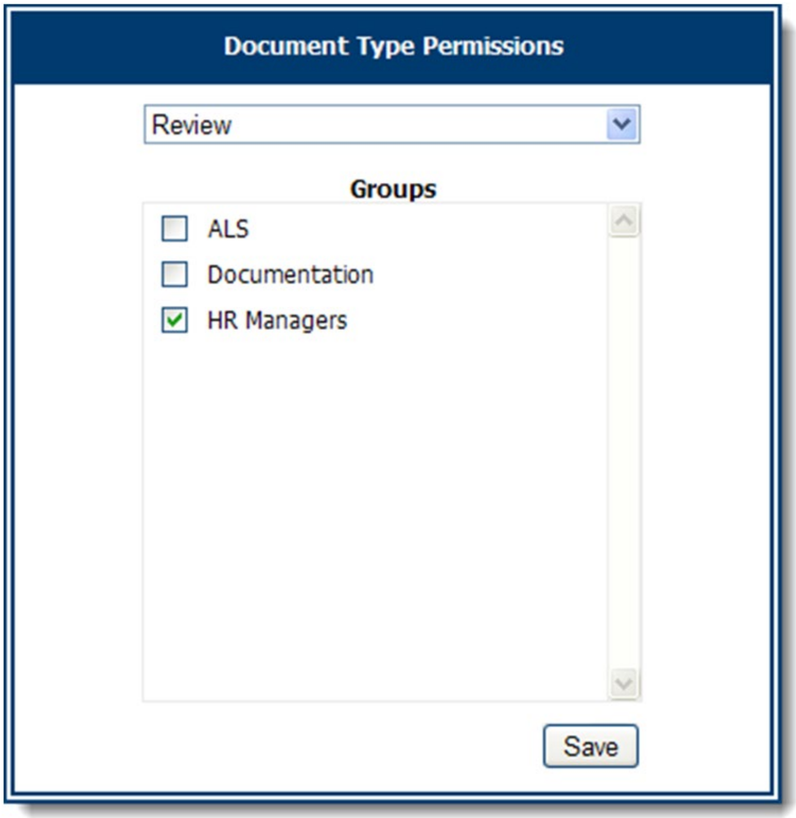
For example, you want the members of your Human Resources group to have access to employee records, but you don't want members of the Accounts Receivable group to see those documents. You can control which documents types are displayed to different groups using the Document Type Permissions page.

By default, all document types are shown to all groups.

To assign document type permissions

1. Click the **Document Type Functions** tab.
2. Click **Document Type Permissions**.

   The Document Type Permissions page opens.



3. From the drop-down list, select the document type you want a group to be able to access.
4. Select the check box next to each applicable group. Only the selected groups can now access the document type.
5. Click **Save**.

Setting Group-Level Advanced Folder Settings

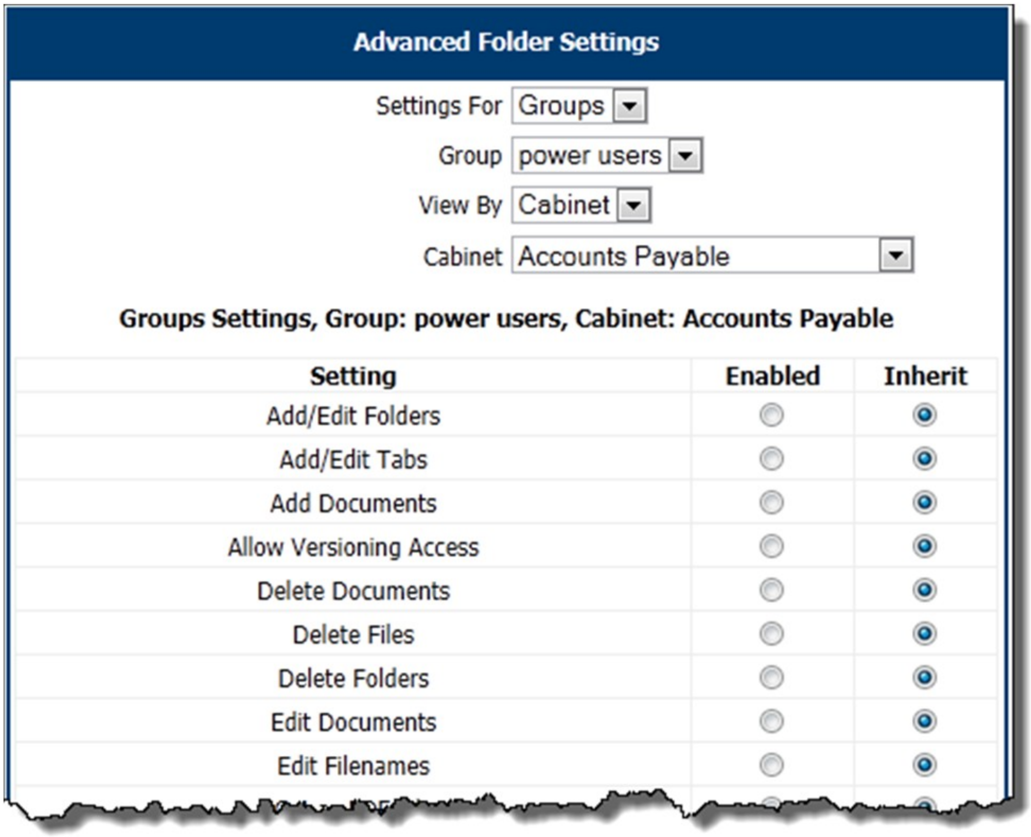
You can set several advanced permissions that determine how a selected group can work with documents in cabinets. Depending on your needs, these permissions can be set globally (applying to all cabinets) or individually by cabinet.

Note: By default, advanced folder permissions are set at the system level. Groups inherit these settings.

To set advanced folder permissions

1. Click the **System Preferences** tab.
2. Click **Advanced Folder Settings**.

   The Advanced Folder Settings page opens.



3. In the **Settings For** drop-down list, select **Groups**.
4. In the **Group** drop-down list, select the group whose permissions you are setting.
5. In the **View By** drop-down list, select one of the following:
   - **Global** – Set group permissions for all cabinets.
   - **Cabinet** – Set group permissions for a single cabinet.
6. If you are viewing by **Cabinet**, select the appropriate cabinet from the list.
7. Next to each setting, select **Enabled** or **Inherit**.
   - **Enabled** – Allows the group to perform the action.
   - **Inherit** – The permission is automatically inherited from the system setting. For example, if the system setting allows all groups with access to the Employee Records cabinet to move files and you want your HR Managers group to have this permission, select Inherit.

Note: System settings also allow you to prevent groups from performing an action. To learn more about each setting, see “Setting System Preferences” on page 12.

8. Click **Save**.

Modifying a Group

You can change a group's name and the users who are assigned to the group.

To modify a group

1. Click the **Group Functions** tab.
2. Click **Edit Group**.

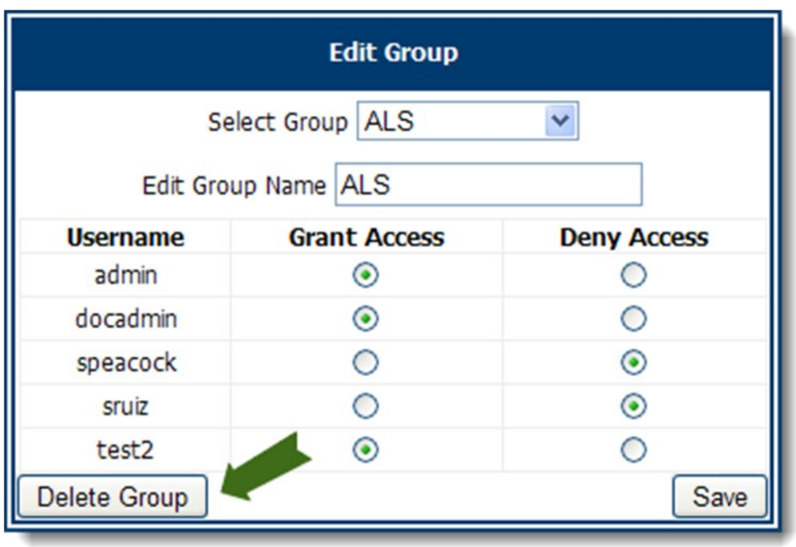
   The Edit Group page opens.
3. Select the group you want to modify.
4. Edit the group's name, if necessary.
5. For each user displayed, select **Grant Access** or **Deny Access**.

   Note: Only users within the current department are displayed.
6. Click **Save**.

Deleting a Group

1. Click the **Group Functions** tab.
2. Click **Edit Group**.

   The Edit Group page opens.



3. Select the group you want to delete.
4. Click the **Delete Group** button.

Managing Users

You must add each user to the Treeno system before they can access the application. Users typically inherit their access rights from their assigned groups. While you can override group permissions for individual users, Treeno recommends managing security at the group level whenever possible.

Note: Department administrators can only create, modify, and delete users within their own department.

You can add one user at a time, or you can import multiple users from a text file. You can also add guest users who have restricted access to the Treeno system for a limited amount of time.

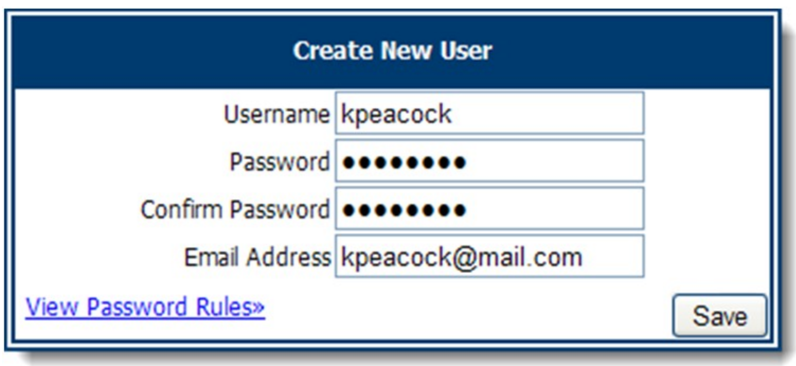
Adding a Single User

When you add a single user to Treeno security, you specify their user name, password, group, and cabinet access.

To add a single user

1. Click the **User Functions** tab.
2. Click **Create New User**.

   The Create New User page opens.

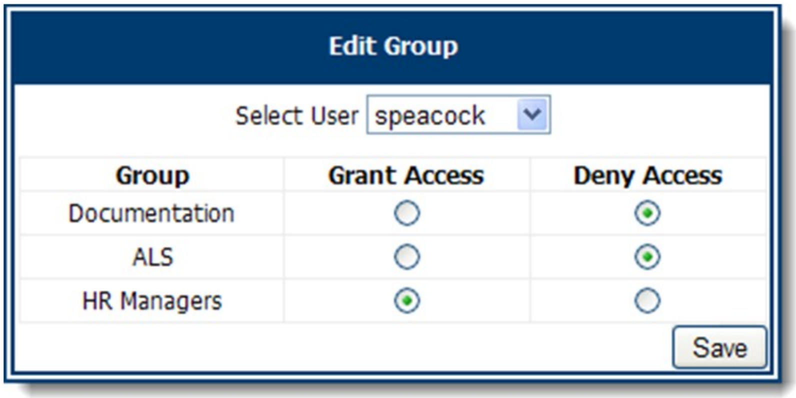


3. Enter a user name and an initial login password for the user.

   Note: Users should change their initial login password when they first log in to Treeno (see page 32). To make this change a requirement, use the Password Restrictions command under System Preferences. You can also specify other password rules (for example, must be at least 6 characters in length, must include at least one alpha character, etc.) using this command (see page 18).

4. Enter the password again to confirm its accuracy.
5. Enter the user's e-mail address, and then click **Save**.

   The Edit Group page opens.



6. Next to each group you want to assign the user to, select **Grant Access**.

Note: The user will inherit the rights assigned to the groups you select. If necessary, you can modify those rights at the user level. See “Modifying User Information” on page 35.

7. Click **Save**.

   The User Cabinet Permissions page opens.

8. For each cabinet, select the access level you want to assign to the user:

   - **Read/Write** – The user can modify the cabinet’s search values and add new folders.
   - **Read Only** – The user can view the cabinet information but cannot make any modifications or add folders.
   - **None** – The user has no access to the cabinet. The cabinet will be hidden from the user’s view.

9. Click **Save**.

Importing Multiple Users

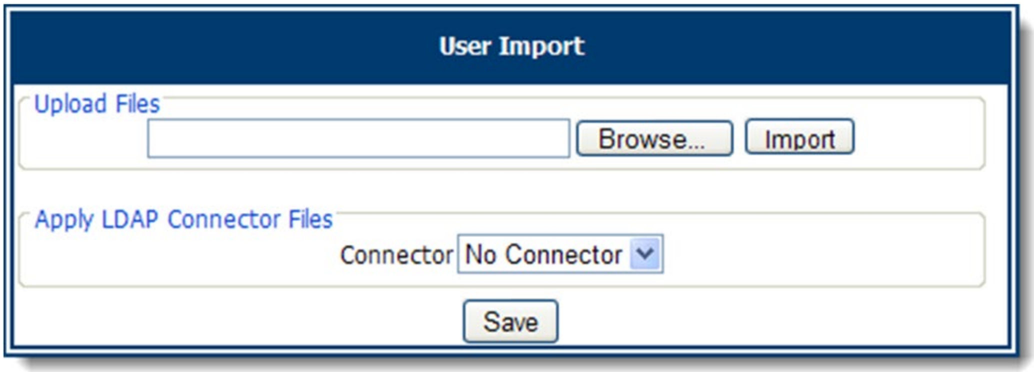
In addition to adding one user at a time, you can import multiple users into Treeno. Create a text (.txt) file that lists the user name and password for each user you want to add to the system. The text file should contain only one user per line, and each field should be separated with a comma or tab.

Note: If you will be using an LDAP connector for user authentication, you should add the connector to the Treeno system before importing users (see page 20).

To import multiple users

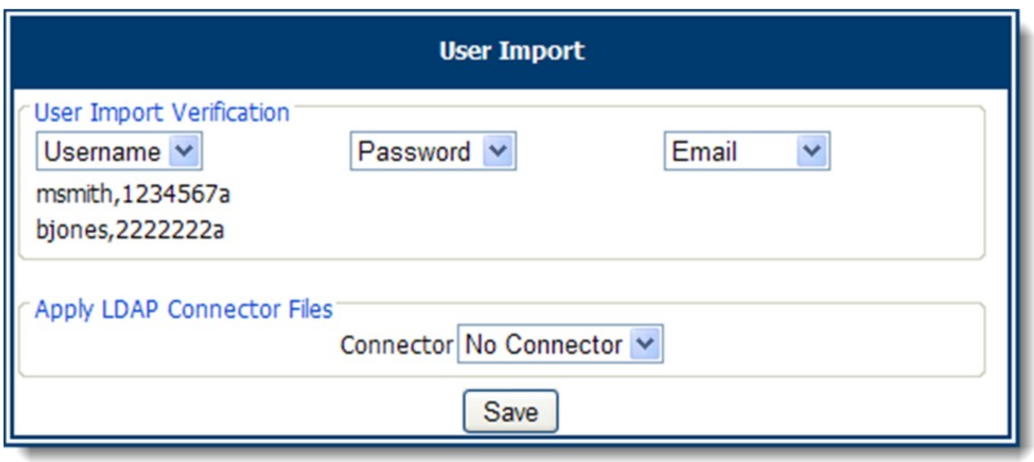
1. Click the **System Preferences** tab.
2. Click **User Import**.

   The User Import page opens.



3. Click **Browse** to navigate to and select the .txt file that contains the users you want to import.
4. Click **Import**.

   The User Import Verification area is displayed.



5. Select the appropriate column for each field in your imported .txt file.
6. If appropriate, select an LDAP connector for user authentication.
7. Click **Save**.

Adding a Guest User

You can create an account for a user who has limited access to your Treeno system and whose login credentials expire after a specified amount of time. For example, you could create a guest account for an auditor.

To create a guest user

1. Click the **User Functions** tab.
2. Click **Create a Guest User**.

   The Create Guest User page opens.

3. Enter a user name and an initial login password for the guest user.

Note: Users should change their initial login password when they first log in to Treeno (see page 32). To make this change a requirement, use the Password Restrictions command under System Preferences. You can also specify other password rules (for example, must be at least 6 characters in length, must include at least one alpha character, etc.) using this command (see page 18).

4. Enter the password again to confirm its accuracy.
5. Enter the user's e-mail address.
6. Select the number of hours the user can access the system until their password expires.
7. Click **Save**.

   The Edit Group page opens.
8. Next to each group you want to assign the guest user to, select **Grant Access**.

Note: The user will inherit the rights assigned to the groups you select. If necessary, you can modify those rights at the user level. See "Modifying User Information" on page 35.

9. Click **Save**.

   The User Cabinet Permissions page opens.
10. For each cabinet, select the access level you want to assign to the guest user:
    - **Read/Write** – The user can modify the cabinet's search values and add new folders.
    - **Read Only** – The user can view the cabinet information but cannot make any modifications or add folders.
    - **None** – The user has no access to the cabinet. The cabinet will be hidden from the user's view.
11. Click **Save**.

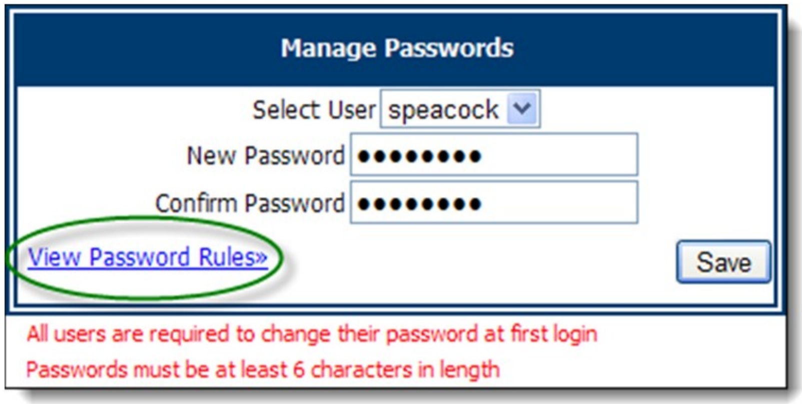
Changing Passwords

Users can change their passwords at any time. Depending on the system preferences you have set, they may be required to change their initial password the first time they log in to Treeno.

To change a user password

1. Click the **User Functions** tab.
2. Click **Manage Passwords**.

   The Manage User Passwords page opens.



3. Select the user whose password you want to change.

Note: When this page is accessed by general end users, they are only able to change their own password information.

4. Enter the new password, and then enter the password again to confirm its accuracy.
5. Click **Save**.

Note: To view the current password requirements for your organization, click the **View Password Rules** link. Rules are set using the Password Restrictions command under System Preferences (see page 18).

Assigning Folder Access

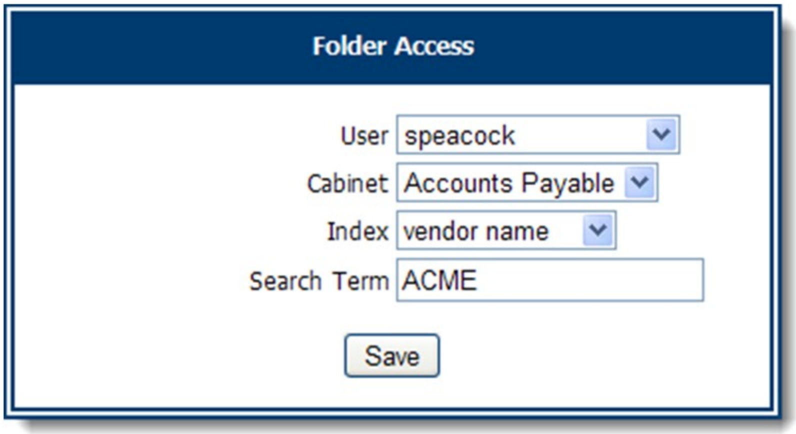
Group permissions typically determine which cabinets a user can access. By default, all folders within a cabinet are shown to all users. You can apply additional security controls by allowing a user to access only certain folders within the cabinet. This is accomplished by filtering a cabinet's index values. Only those folders that meet the filter criteria are displayed to the user.

Note: For cabinets using the Document Type structure, you can also control which document types are displayed to all users in a department (see page 53).

To assign folder access

1. Click the **User Functions** tab.
2. Click **Folder Access**.

   The Folder Access page opens.



3. Select the appropriate user.
4. Select the cabinet whose folders you want the user to access.
5. Select the index field you are filtering by.
6. Enter the filter criteria. For example, to show only folders containing documents from a vendor named ACME, enter “ACME” in the **Search Term** field.
7. Click **Save**.

   The filter is applied to the cabinet so that the user only has access to the folders that meet your filter criteria.

Removing Access Restrictions

If you no longer want a cabinet filter to control a user’s folder access, you can remove the filter. By default, users have access to all folders in a cabinet.

To remove folder access restrictions

1. Click the **User Functions** tab.
2. Click **Remove Access Restrictions**.

   The **Remove Access Restrictions** page opens.

3. Select the check box next to each filter you want to remove from the cabinet.

4. Click **Delete**.

Modifying User Information

You can change a user's login credentials and assigned groups. Only when necessary, you can also override certain group permissions to meet the needs of the individual user.

To modify a user

1. On the **User Functions** tab, do one or more of the following:
   - To change the user's name and initial login password, click **Edit User Info** (see "Adding a Single User" on page 29).
   - To change the user's groups, click **Edit Group** (see "Adding a Single User" on page 29).
   - To change the user's cabinet permissions, click **User Cabinet Permissions** (see "Adding a Single User" on page 29).
   - To change the user's folder access, click **Folder Access** (see "Assigning Folder Access" on page 33).
2. On the **System Preferences** tab, do the following:
   - To change a user's folder permissions, click **Advanced Folder Settings** (see "Setting Advanced Folder Settings" on page 26).

Deleting a User

When you no longer want a user to have access to Treeno, delete them from security.

To delete a user

1. Click the **User Functions** tab.
2. Click **Delete User**.
3. Select the user and click **Delete**. You are not prompted to confirm the deletion.

Batch Processing Files

During the scanning process, users can index multiple files at one time by scanning a barcode that automatically uploads the files to a designated cabinet. The files remain in the cabinet inbox until a user enters the appropriate index values for each one. This batch processing allows all data entry to be performed at one time.

You use the Indexing command on the User Functions tab to index multiple files at once. A list of cabinets you have access to is displayed, and the number of files waiting in each cabinet inbox is indicated. This number decrements accordingly as you process documents. When you open a document, it is locked to prevent other users from attempting to index it while you are working on it.

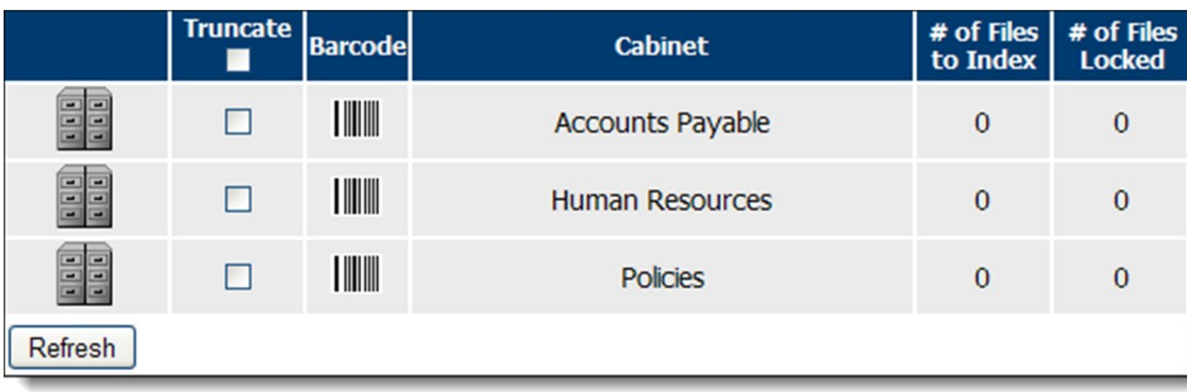
You begin indexing by clicking a cabinet. The first file waiting to be indexed is displayed. From this page, you can do the following:

- Scroll through each file in a multi-page document. This allows you to index each file accordingly.
- View a PDF file as a JPEG. This allows you to view a PDF document if you do not have Acrobat Reader installed.
- Enter the appropriate values for each cabinet index.
- Assign a document type to the file and enter the index values for that type (applicable only to folders using document types).
- Delete a file from the cabinet.
- Skip a file to be processed later. The file is locked (see page 37).

To batch process files

1. Click the **User Functions** tab.
2. Click **Indexing**.

   The Indexing window opens.



3. Click a cabinet in which there are files waiting to be indexed.

   The first file in the batch opens. The cabinet's index fields are displayed below the image.

   Note: Select the check box to display a PDF file as a JPEG.

4. TAB through each field and enter the required data.
5. If you are indexing to a cabinet that uses document types, select a document type for the file from the **Choose a Document** drop-down list.
6. Enter the index values for the document type, as needed.
7. Click **Submit** to index and store the file.
8. (Optional) If this is a multi-page document, you can click the arrow buttons to move through the pages of the document to locate information needed for indexing.

After you submit the file, the next file in the batch will automatically open.

Note: To delete a file from the cabinet inbox, click **Delete**. To return to a file later, without processing it, click **Skip**.

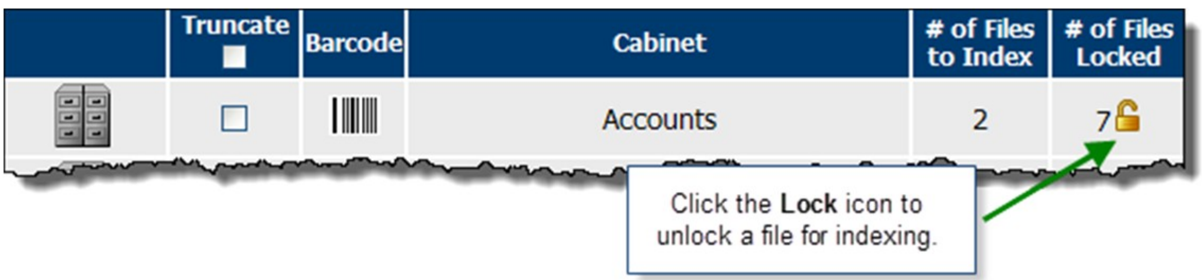
Unlocking Files

While you are indexing a document, Treeno locks it to prevent other users from trying to process it at the same time. If you begin processing a document but navigate away from the indexing page before you click the Submit button, the file is locked. You can unlock the file by clicking the Lock icon next the appropriate cabinet on the Batch Processing page.

To unlock a file

1. Next to the cabinet where you want to index files, click the **Lock** icon.
2. Click **OK** to confirm you want to unlock all files.

The files are added back to the **Number of Files to Index** column.



Refreshing a Cabinet

If a file has been modified while it is waiting in a cabinet inbox to be indexed, you can refresh the cabinet to display the most current version of the file.

To refresh a cabinet

1. Select the **Refresh** check box next to the appropriate cabinet. You can also click the **Refresh** check box at the top of the cabinet list to refresh all cabinets.
2. Click **OK** to confirm the refresh.

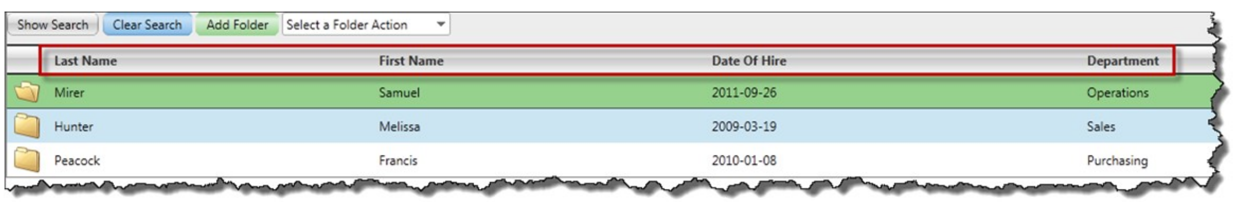
Working with Cabinets

Cabinets are the basic storage units within Treeno EDM. Cabinets contain folders and documents just as they do in the physical world. The cabinets you set up for your organization should mirror your current filing practices. For example, your organization might require the following cabinets: Accounts Payable, Accounts Receivable, Human Resources, and Purchase Orders.

Cabinet access is permission based. Someone who works in Accounts Payable, for instance, most likely will not have access to a Human Resources cabinet. You can assign cabinet permissions by group (see page 24) or by individual user (see page 29). Users access their cabinets primarily from the Document Center tab in Treeno EDM.

Each cabinet contains folders that store scanned or electronic documents. A 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. When users add a new document to a cabinet, they enter information from the document into the cabinet's index fields. This information is stored with the document and enables all users to later search for and retrieve it.

You define the index fields for each cabinet that you create. When you open a cabinet in Treeno EDM, the cabinet's index fields are displayed as column headers, as shown below:

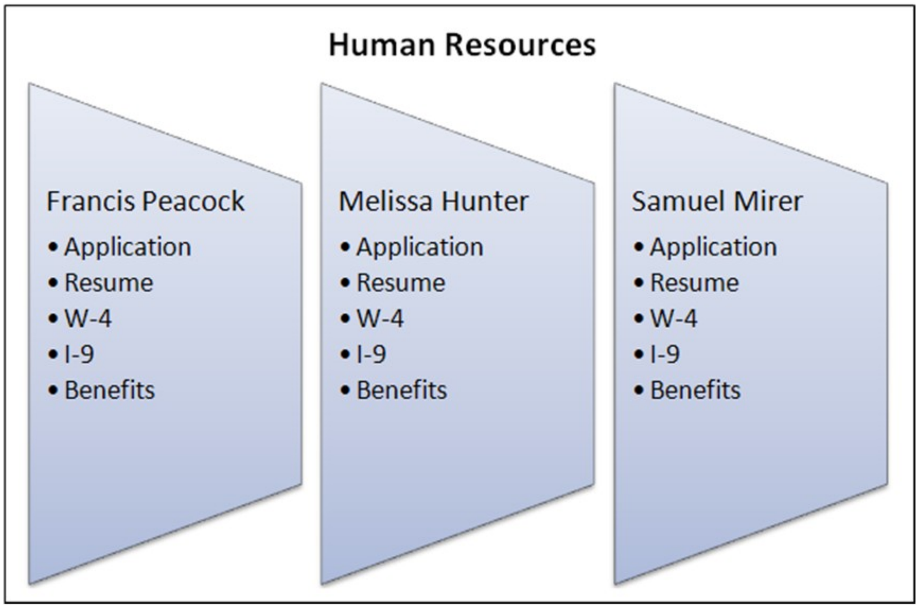


Last Name	First Name	Date Of Hire	Department
Mirer	Samuel	2011-09-26	Operations
Hunter	Melissa	2009-03-19	Sales
Peacock	Francis	2010-01-08	Purchasing

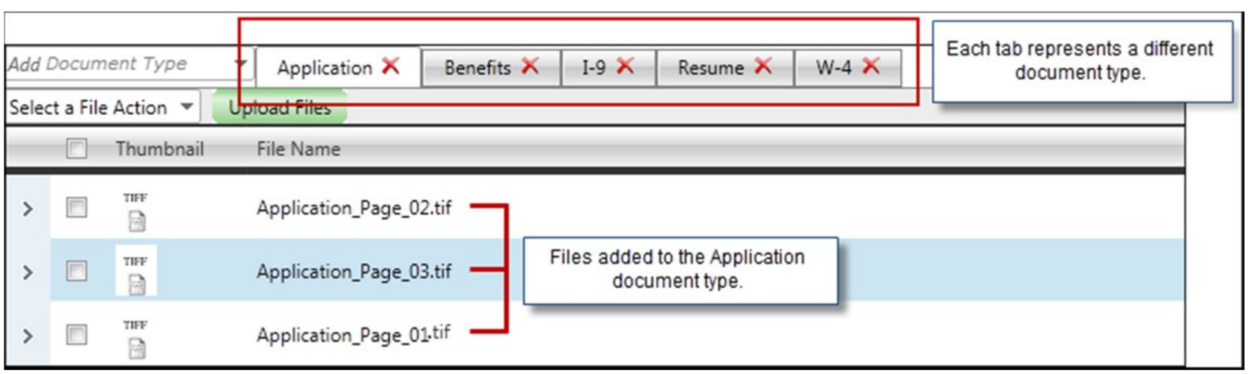
After users complete the index fields for a document they are adding, Treeno creates a new folder for the document and displays it in the cabinet. Typically, each folder contains a single file, but you can add an unlimited number of files to the same folder. Doing so, however, decreases your search capabilities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

Document Types

You may have found that using tabs in physical folders helps you to organize 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:

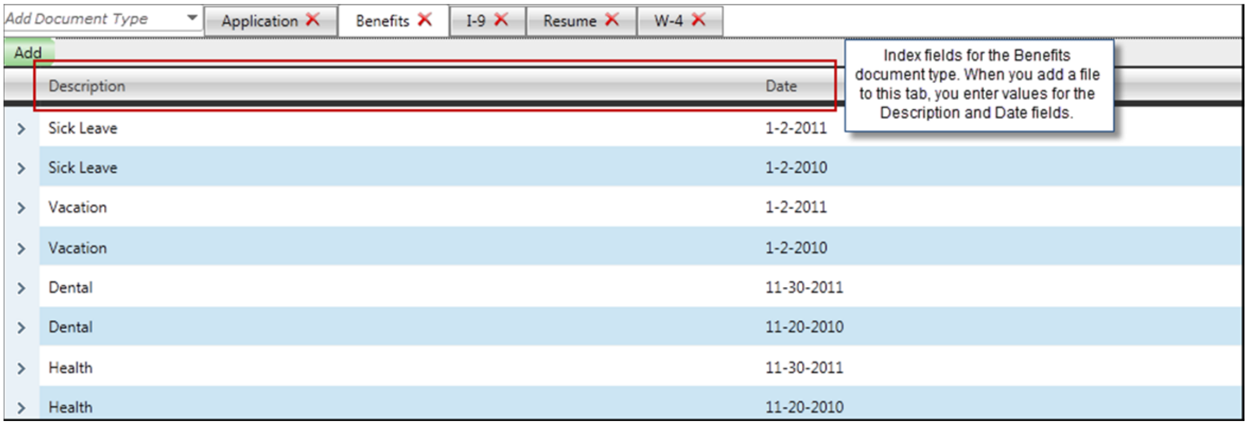


Rather than storing these files at the root level of the employee folder, which may be cumbersome if you have dozens of documents for each employee, you can define tabs for the folder that represent each document type. These document types are displayed in the Add Document Type drop-down list on the Document Center tab in Treeno EDM. Grouping files according to document type lends visual organization to a folder and enables users to find the files they need more easily. 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.



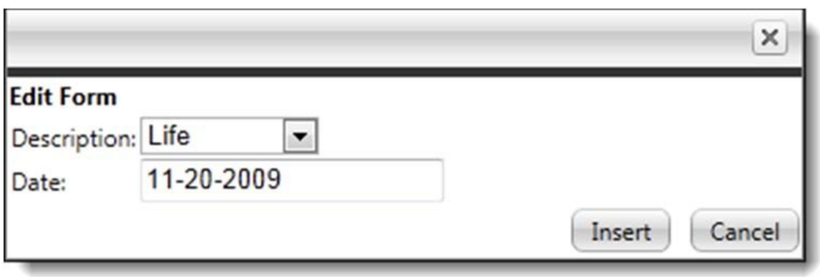
When users add a file to a folder, they can select the appropriate document type tab and store the file in that location. They can also select a new document type from the Add Document Type drop-down list.

So far, we have described the benefits of using document types to organize the files in a folder. However, searching for files becomes even easier when you go one step further and assign each document type a unique set of index fields. These index fields are displayed as column headers below the document type tab. In the following example, the Benefits document type has been assigned two index fields: Description and Date.

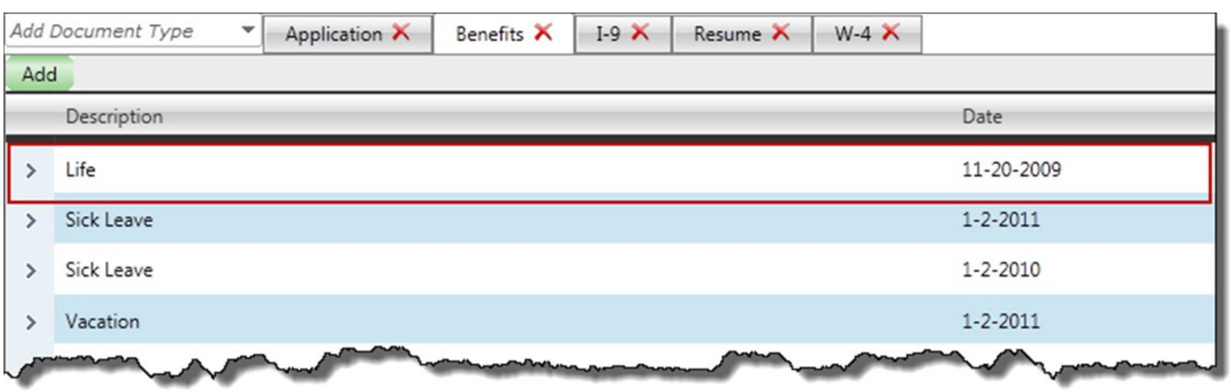


Index fields provide information about the file that is being added to the document type. The file might be uploaded to Treeno from a local or network drive or it might be scanned directly to this location. Either way, the information you provide using the document type's index fields will uniquely identify that file from all the others in the Treeno repository.

When users need to add a file to a document type, they click the **Add** button. The Edit Form window opens and prompts the user to enter the appropriate values for the index fields:



The index values are displayed as a row in the list of documents already assigned to the document type:



Users can then upload a file or print a barcode to this location. To upload a file, you expand the row you just created by clicking the left-hand arrow. You then click the **Upload Files** button to select the appropriate file and add it the Treeno:

To print a barcode so you can scan a paper document to this location, you click the **Select a File Action** down arrow and then select **Print Barcode**:

Regardless of how a file is added to a document type, users will be able to retrieve the file by searching on its unique index fields, as well as the index fields for the cabinet where the file is stored.

For additional information on configuring document types in Treeno Administration, see page 49.

Creating a Cabinet

When you create a new cabinet, you define the metadata that describes the folders contained in the cabinet. This metadata is stored in index fields. You also indicate which groups have access to the cabinet. Users that are not assigned to one of those groups will not see the cabinet when they log in to the Treeno system.

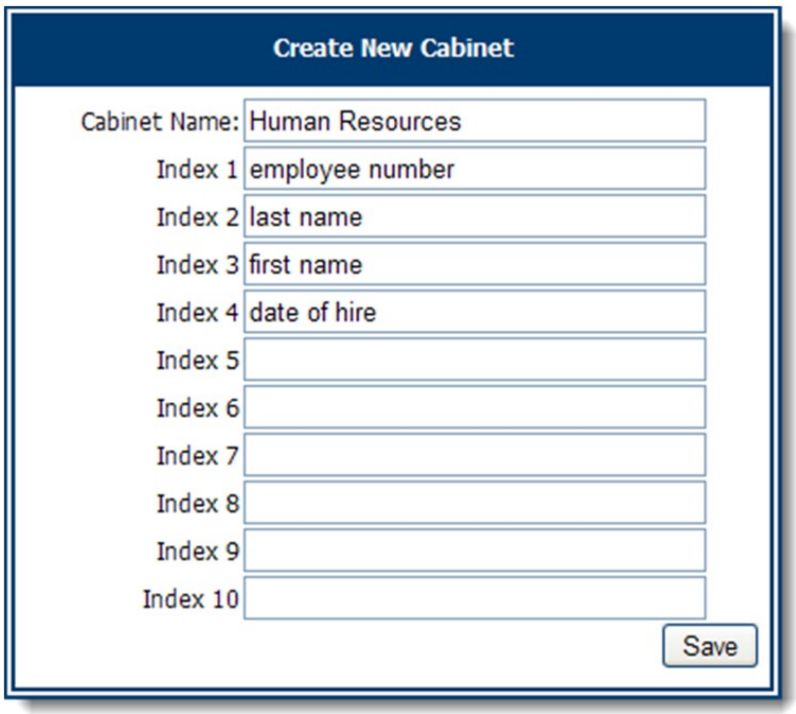
Note: Department administrators can only create cabinets within their own department.

Creating a New Cabinet

To create a new cabinet

1. Click the **Cabinet Functions** tab.
2. Click **Create New Cabinet**.

   The Create New Cabinet page opens.

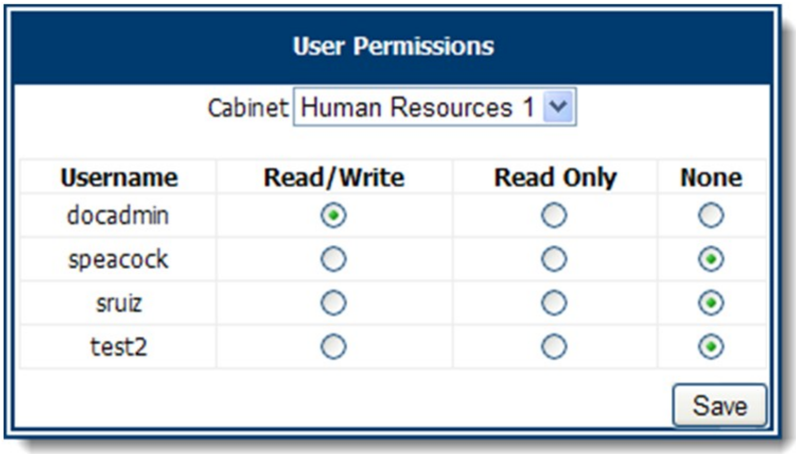


3. Enter the cabinet name.
4. Enter each index field you want to assign to the folders in the cabinet. Users will populate these index fields when they create a new folder. They will also perform searches using these fields.

   Note: You must use the lower case when defining index fields.

5. Click **Save**.

   The User Permissions page opens.



6. If you want to override a particular user's group permissions at the cabinet level, select one of the following options:
   - **Read/Write** – The user can modify the cabinet's search values and add new folders.
   - **Read Only** – The user can view the cabinet information but cannot make any modifications or add folders.
7. If you want a user's group permissions to determine his or her cabinet access, select **None**.
8. Click **Save**.

Setting Cabinet-Level Advanced Folder Permissions

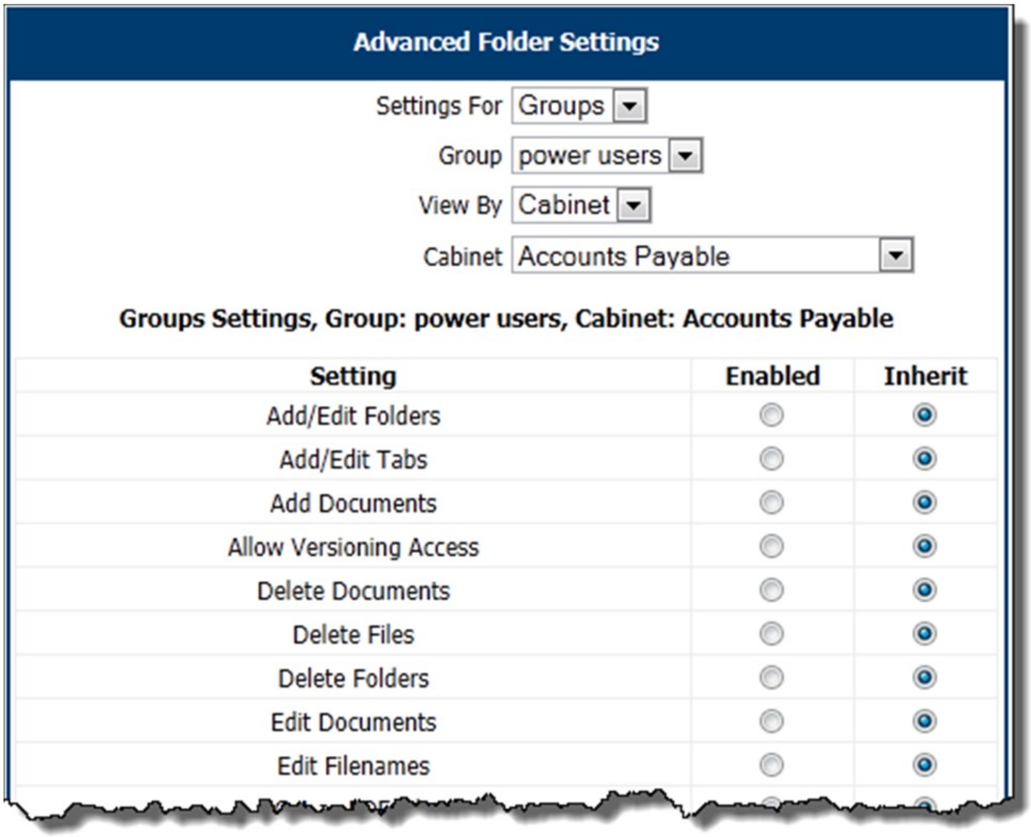
Setting advanced folder permissions at the cabinet level controls how users can work with the documents in a particular cabinet. Folder permissions can vary from cabinet to cabinet.

Note: By default, advanced folder permissions are set at the system level. Groups inherit these settings.

To set advanced folder permissions

1. Click the **System Preferences** tab.
2. Click **Advanced Folder Settings**.

   The Advanced Folder Settings page opens.



3. In the **Settings For** drop-down list, select one of the following:
   - **System** – Set cabinet permissions for all users in the Treeno system.
   - **Groups** – Set cabinet permissions for a selected group.
   - **Users** – Set cabinet permissions for a selected user.
4. If you are setting permissions for a group or user, make the appropriate selection.
5. In the **View By** drop-down list, select **Cabinet**, and then select the appropriate cabinet.
6. Next to each setting, select **Enabled** or **Inherit**.
   - **Enabled** – Allows a user to perform the action.
   - **Inherit** – The permission is automatically inherited from the system setting. For example, if the system setting allows all groups with access to the Employee Records cabinet to move files and you want your HR Managers group to have this permission, select **Inherit**.

Note: System settings also allow you to prevent users from performing an action. To learn more about each setting, see “Setting System Preferences” on page 12.

7. Click **Save**.

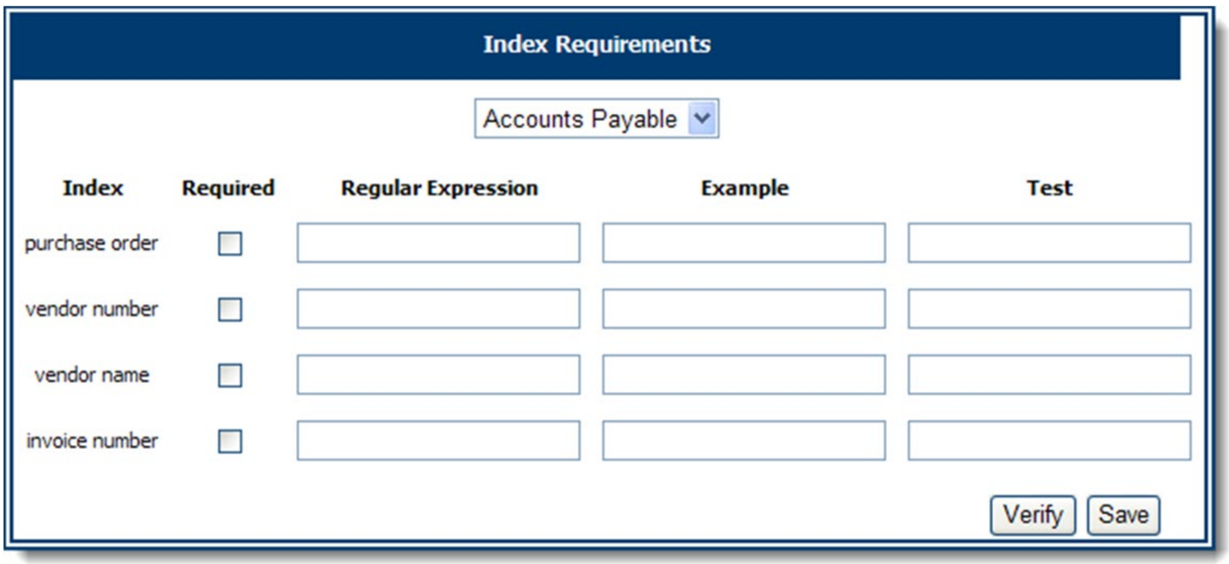
Defining Index Requirements for Cabinets

You can require users to follow a specific format when they enter index values for a cabinet folder. This format, defined by a regular expression, ensures that search results will be accurate and consistent. To guide users in their data entry, you can provide examples as a reference.

To define index requirements

1. Click the **Cabinet Functions** tab.
2. Click **Index Requirements**.

   The Index Requirements page opens.



3. Select the appropriate cabinet.
4. To require users to enter a value for an index, select the **Required** check box.
5. Enter the regular expression for each applicable index.
6. To provide an example when users do not format an index value correctly, in the **Example** field enter the text you want displayed.
7. (Optional) Enter a test string for each index and click **Verify**. If the string is formatting correctly, the **Test** field is displayed in green. If it contains errors, the field is displayed in red.
8. Click **Save**.

Modifying a Cabinet

The Cabinet Functions tab lets you change a cabinet's name, index fields, group permissions, and user access.

To change a cabinet's advanced folder settings, use the System Preferences tab (see page 43).

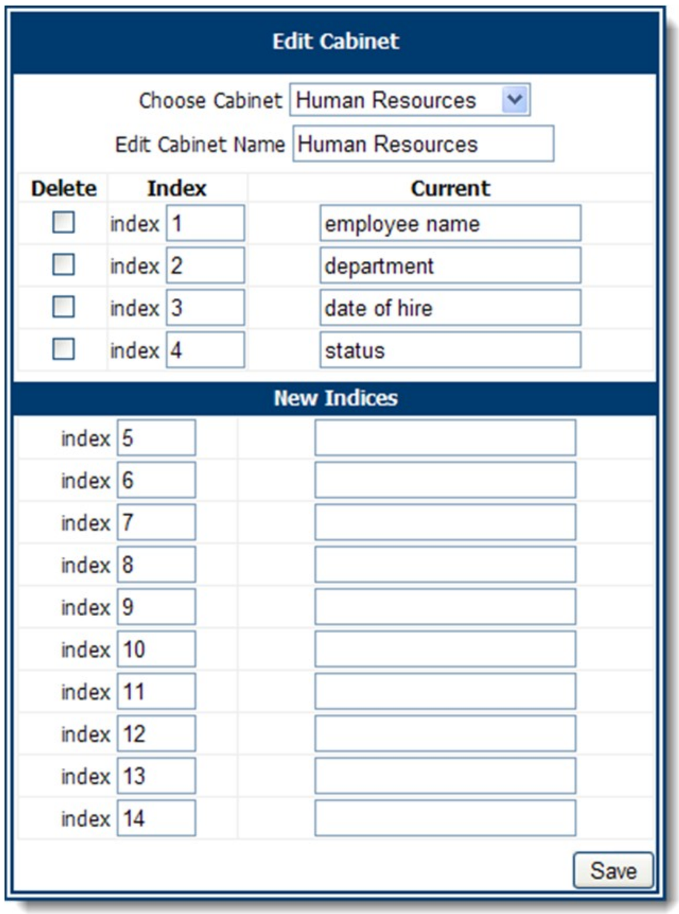
Editing Index Fields

You can change a cabinet's name and its metadata—or index—fields that are used to search for files within folders.

To edit a cabinet's index fields

1. Click the **Cabinet Functions** tab.
2. Click **Edit Cabinet**.

   The Edit Cabinet page opens.



3. Select the cabinet to modify.
4. Modify the cabinet name, if necessary.
5. Do one or more of the following:
   - To delete an index field, select the **Delete** check box.
   - To reorder the index fields, change the number next to each field accordingly. This number indicates the display order of the index in the folder and search pane.

- To modify the name of an existing index, enter your changes in the **Current** field.
- To add a new index, enter its name in the first available blank field under **New Indices**.

6. Click **Save**.

Note: You must use the lower case when entering index fields.

Changing Group Permissions

A group's cabinet permissions are typically set when the group is created; however, you can modify these rights at any time for a selected cabinet.

To change a group's cabinet permissions

1. Click the **Cabinet Functions** tab.
2. Click **Group Cabinet Permissions** to open the Group Cabinet Permissions page.
3. Select the cabinet.
4. For each group, select the appropriate rights:
   - **Read/Write** – The group can modify the cabinet's search values and add new folders.
   - **Read Only** – The group can view the cabinet information but cannot make any modifications or add folders.
   - **None** – The group has no access to the cabinet. The cabinet will be hidden from the group's view.
5. Click **Save**.

Deleting a Cabinet

The ability to delete a cabinet is a global setting that should be restricted to system and department administrators.

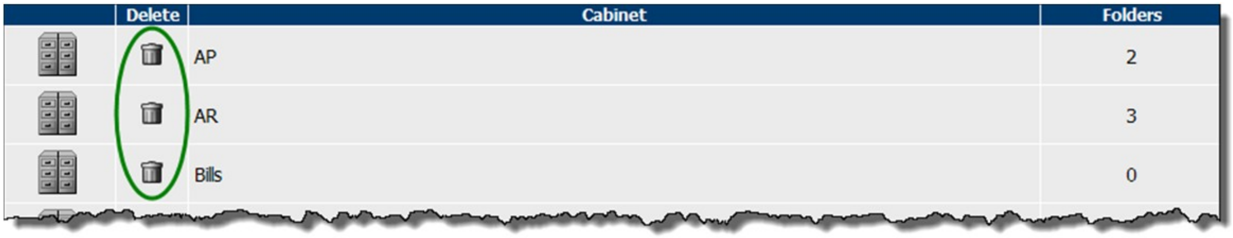
Deleted cabinets are sent to the recycle bin where they can later be restored or permanently purged.

Warning! Any folders and files in the cabinet are also deleted.

To delete a cabinet

1. Click the **Cabinet Functions** tab.
2. Click **Delete Cabinet**.

   The Delete Cabinet page opens.



3. Click the **Delete** () icon next to the appropriate cabinet.
4. Click **OK** to confirm the deletion.

Using Document Types

A document type serves two purposes: it provides visual organization to a folder and it gives the user additional control over how a file is indexed, since each type can have its own index values that are independent of the cabinet's index values.

For example, in a Human Resources cabinet, you may have one folder for each employee in the company. Each folder is identified with an employee number, employee name, department, date of hire, and employment status. Within this employee file, you may need to store many different types of documents, such as I-9s, employee reviews, salary information, job descriptions, etc. Each of these different files can be assigned a document type with its own set of index values. Using those index values, you can then search for a specific document. For example, if an employee review document type has the date of review and manager's name as index values, you can perform a search to find only those reviews that occurred on a specific date by a certain manager.

Each document type you create is displayed as a tab in a folder. The user selects the appropriate document type when they add a file to the folder. Depending on the needs of your organization, you can determine which of your document types require index fields and which don't. When users add a file to a document type with index fields, they are prompted to populate the required index values.

For more information on using document types in Treeno EDM, see page 38.

Document Type Wizard

Use the Document Type Wizard to create, modify, enable, and copy the document types for your organization. The document types you define are displayed in the Add Document Type drop-down list on the Document Center tab.

Note: Department administrators can only create document types within their own department.

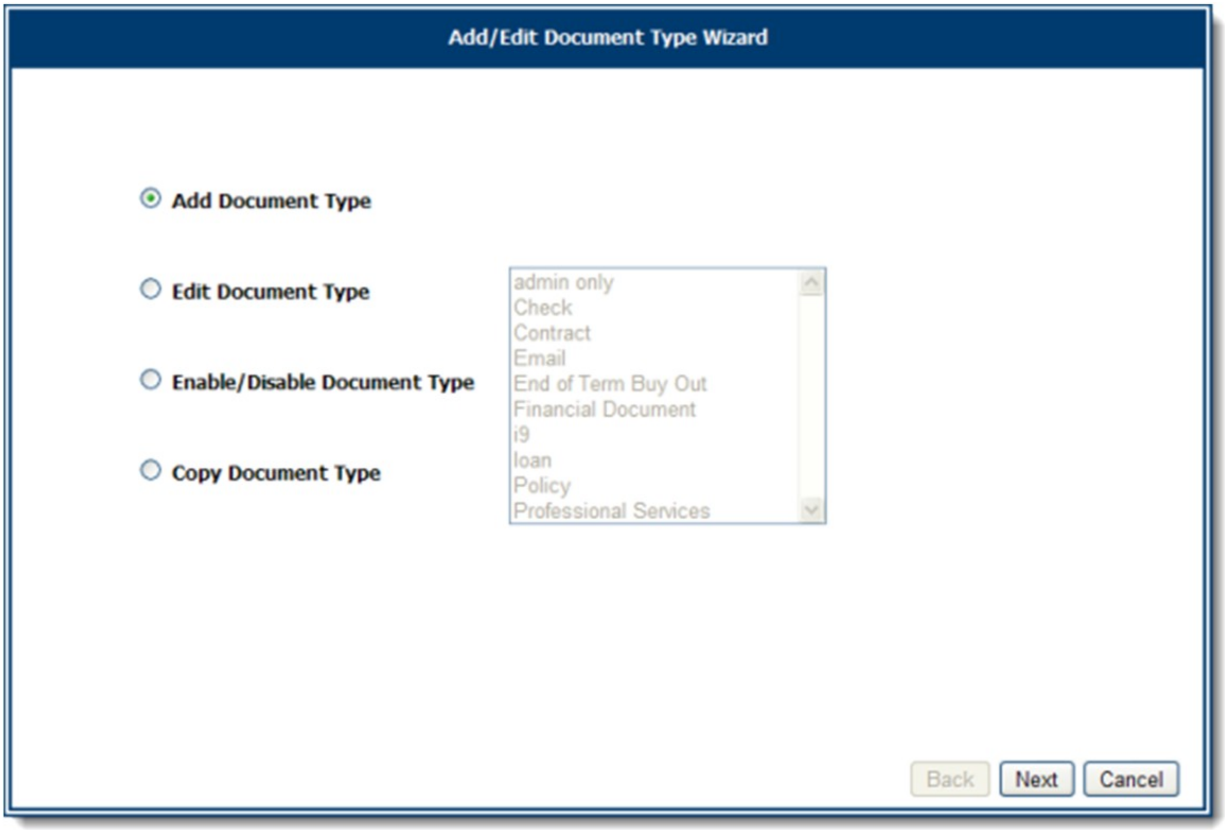
Creating a New Document Type

When you create a new document type, you can assign it index fields and enable or disable it for all users.

To create a document type

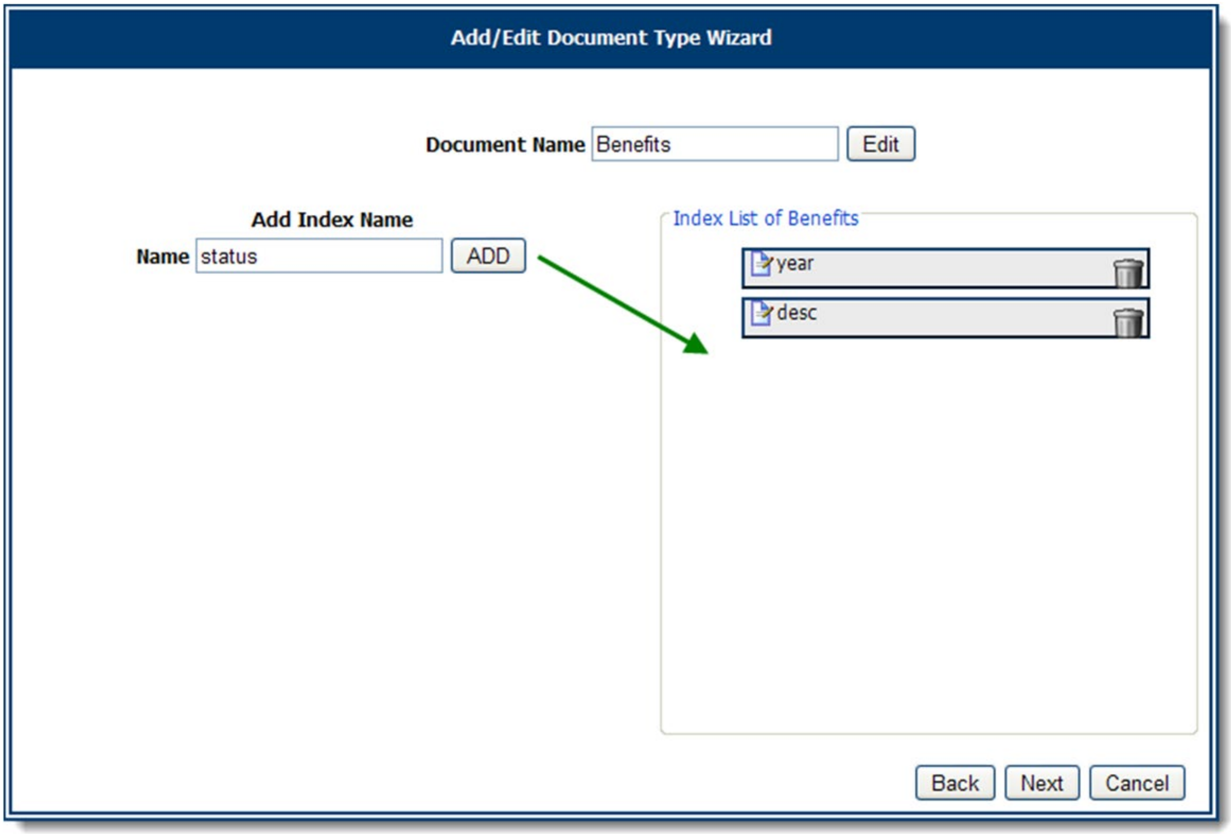
1. Click the **Document Type Functions** tab.
2. Click **Document Type Wizard**.

   The Document Type Wizard page opens.



3. Confirm that **Add Document Type** is selected and click **Next**.
4. Enter the name of the document type and click **Add**.
5. (Optional) Enter the first index field for the document type and click **Add**.

   The index field is shown in the **Index List**.
6. (Optional) Add additional index fields, as needed.



Note: To delete an index field you just added, click the **Delete** ( ) icon next to the field in the Index List. To modify the name of an index field, click the **Edit** ( ) icon, make your changes, and then click the **Save** ( ) icon.

7. Click **Next**.
8. To display the document type to users when they are indexing files, select **Enable Document Type**. To hide the type, select **Disable Document Type**.
9. Click **Next**.
10. After your changes have been saved successfully, click **Restart** to return to the first page of the wizard.

Modifying a Document Type

Use care when modifying a document type as your changes affect all new and existing applications of the type. For example, if you remove an index field from a document type that is already in use in several folders, users will lose the ability to perform searches using that index field.

To modify a document type

1. Click the **Document Type Functions** tab.

2. Click **Document Type Wizard**.
3. Select **Edit Document Type** and then select the type you want to edit.
4. Click **Next**.
5. Do one or more of the following:
   - Change the name of the document type and click **Edit**.
   - Enter a new index field for the document type and click **Add**. You must use the lower case when entering an index.
   - Click the **Delete** ( ) icon next to a listed index field to remove it from the document type.
   - Click the **Edit** ( ) icon next to a listed index field, change its name as needed, and then click the **Save** ( ) icon.
6. Click **Next**.
7. To display the document type to users when they are indexing files, select **Enable Document Type**. To hide the type, select **Disable Document Type**.

Note: Users cannot search on disabled document types.

8. Click **Next**.
9. After your changes have been saved successfully, click **Restart** to return to the first page of the wizard.

Enabling or Disabling a Document Type

When enabled, a document type is displayed in the list of available types for a file that is being indexed. When disabled, the type is removed from the list.

If you disable a document type after it has already been in use, it will continue to display as part of a file's metadata; however, users will not be able to search on it.

To enable or disable a document type

1. Click the **Document Type Functions** tab.
2. Click **Document Type Wizard**.
3. Select **Enable/Disable Document Type** and then select the appropriate type.
4. Click **Next**.
5. To allow users to select the document type when they are indexing files, select **Enable Document Type**. To prevent users from selecting the type, select **Disable Document Type**.
6. Click **Next**.
7. After your changes have been saved successfully, click **Restart** to return to the first page of the wizard.

Copying a Document Type

To save time, you can copy an existing document type whose index fields are similar to the new document type you want to create.

To copy a document type

1. Click the **Document Type Functions** tab.
2. Click **Document Type Wizard**.
3. Select **Copy Document Type** and then select the document type that most closely resembles the one you want to create.
4. Click **Next**.
5. In **Document Name**, change the "Copy of" default name to a more descriptive name for the new document type. Click **Edit**.
6. The indices from the original document type are displayed. Do one or more of the following:
   - Add a new index field and click **Add**.
   - Click the **Delete** ( ) icon next to an index field to remove it from the new document type.
   - Click the **Edit** ( ) icon next to an index field, change its name as needed, and click the **Save** ( ) icon.
7. Click **Next**.
8. To allow users to select the document type when they are indexing files, select **Enable Document Type**. To prevent users from selecting the type, select **Disable Document Type**.
9. Click **Next**.
10. After your changes have been saved successfully, click **Restart** to return to the first page of the wizard.

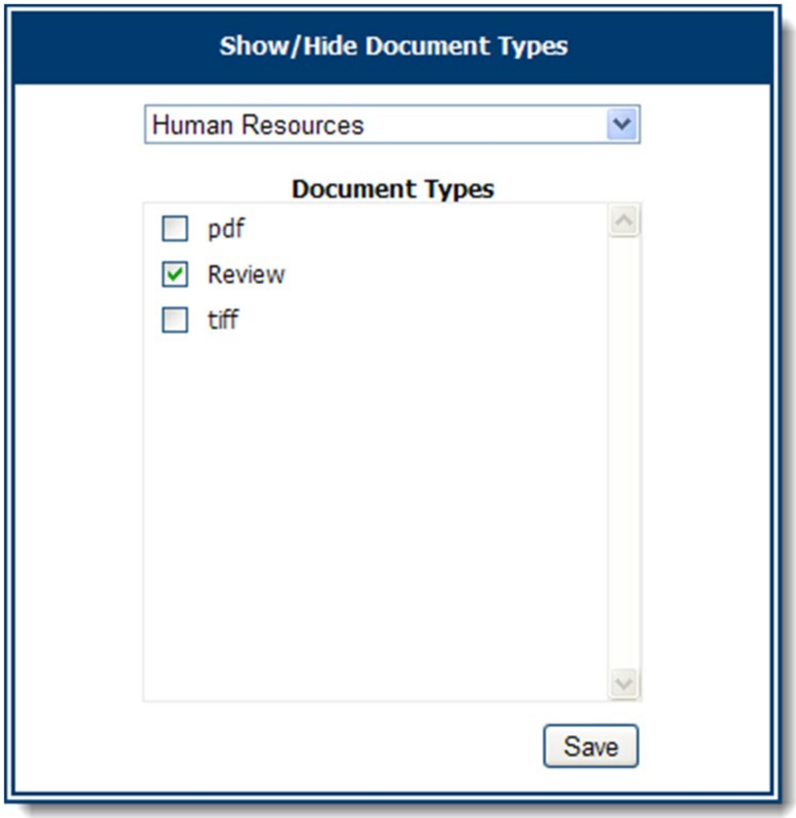
Showing and Hiding Document Types

You can control which document types are shown in each cabinet. When you hide a document type, users cannot assign it to a file they are uploading or indexing.

By default, all document types are displayed.

To show or hide a document type

1. Click the **Document Type Functions** tab.
2. Click **Show/Hide Document Types**.



3. Select the cabinet you want to work with.
4. Select the check box next to each document type you want to make available in the cabinet. Those document types that are not selected are now hidden from the cabinet view.
5. Click **Save**.

Note: For information on assigning document type permissions by group, see page 25.

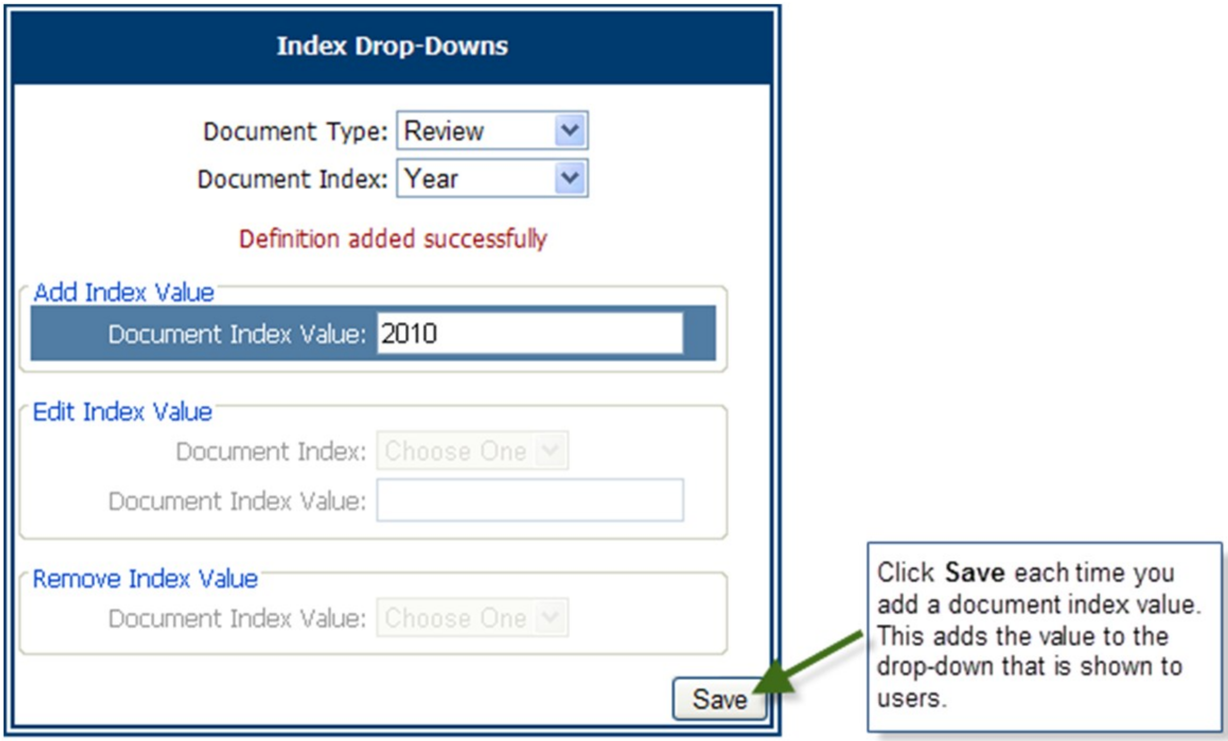
Adding Values to Document Type Index Fields

You can format a document type index field as a drop-down with predefined values so that users do not have to manually enter a value. This saves users time and prevents the possibility of data entry errors, which could skew search results.

To add values to document type index fields

1. Click the **Document Type Functions** tab.
2. Click **Index Drop-Downs**.

   The Index Drop-Downs page opens.



3. Select the appropriate document type.
4. Select the index field you want to add values to.
5. In the **Add Index Value** area, enter the first index value, and then click **Save**.

Note: Click in the **Document Index Value** field to make the area active.

6. Continue to add values to the index field, clicking **Save** after each entry.
7. If necessary, do one of the following:
   - To change an index value, in the **Edit Index Value** area, select the value, enter the new text, and then click **Save**.
   - To delete a value from the index field, in the **Remove Index Value** area, select the value and click **Save**.

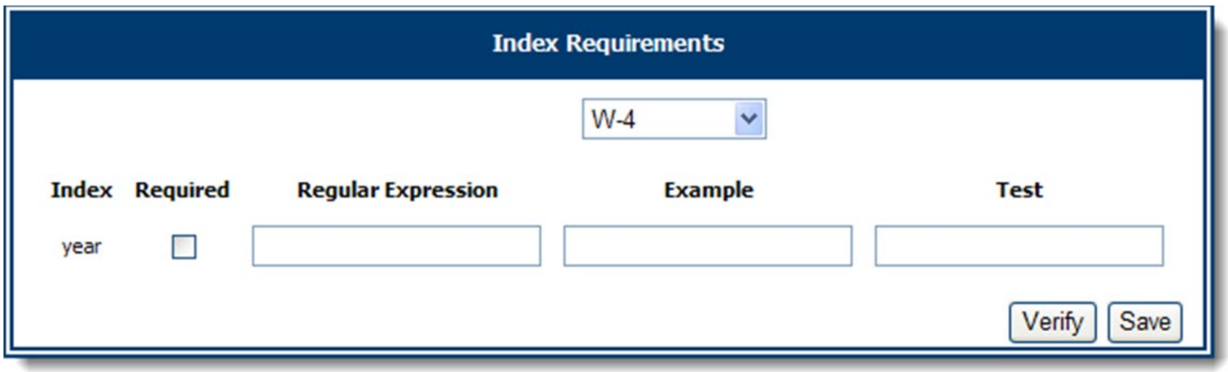
Defining Index Requirements for Document Types

You can require users to follow a specific format when they enter index values for a document type. This search pattern is described by a regular expression. To ensure that users format index values correctly, you can provide examples as a reference.

To define index requirements

1. Click the **Document Type Functions** tab.
2. Click **Index Requirements**.

   The Index Requirements page opens.

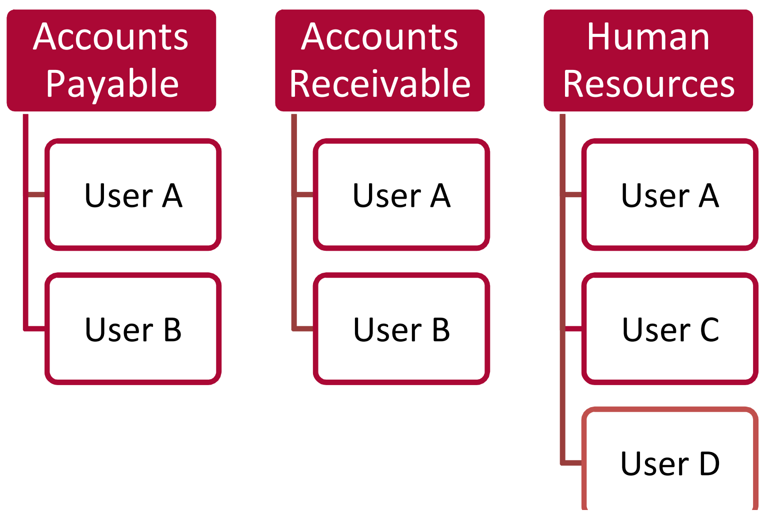


3. Select the appropriate document type.
4. To require users to enter a value for an index field, select the **Required** check box.
5. Enter the regular expression for each applicable index field.
6. To provide an example when users do not format an index value correctly, in the **Example** field enter the text you want displayed.
7. (Optional) Enter a test string for each index field and click **Verify**. If the string is formatting correctly, the **Test** field is displayed in **green**. If it contains errors, the field is displayed in **red**.
8. Click **Save**.

Managing Departments

You control access to your organization's data by defining different departments (for example, Accounts Payable, Accounts Receivable, Human Resources, and so on). Each department typically has access to a single database and is managed by a department administrator. When you assign users to a department, you give them rights to that database. When appropriate, a user can be assigned to multiple departments.

In the following image, User A has access to the Accounts Payable, Accounts Receivable, and Human Resources departments, while User C and User D only have access to the Human Resources department.



Unlike a system administrator who can make system-wide changes, a department administrator can only make changes within the departments that he or she has access to. Department administrators are added to the system by a system administrator. For more information about administrator access levels, see page 11.

Organizations where the Treeno Document Server is installed may have one in-house system administrator and several department administrators. Users of the Treeno SaaS system typically only have in-house department administrators. Their Treeno support representative serves as their system administrator when needed.

A single department can have multiple department administrators.

Creating a New Department

When you create a new department, you indicate which users have access to that data. Access can then be further defined at the group, cabinet, and document type levels.

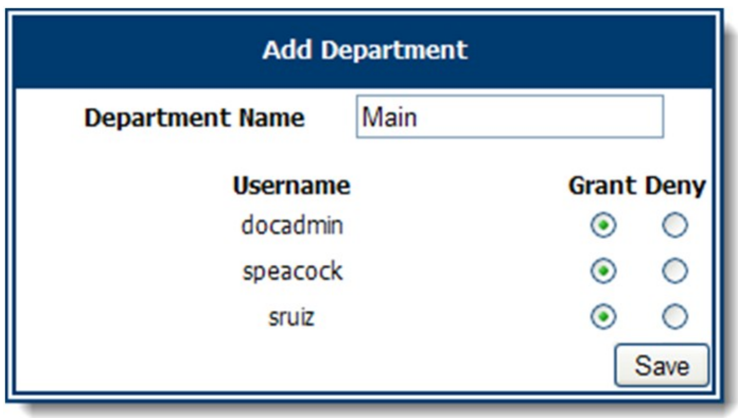
Users who are assigned to multiple departments can switch between departments using the Department drop-down at the top of the Treeno window. To learn how to enable this drop-down, see page 17.

Note: Only a system administrator can create new departments.

To create a new department

1. Click the **Manage Departments** tab.
2. Click **Add Department**.

   The Add Department page opens.



3. Enter the department name.
4. For each user you want to give access to the department, click **Grant**.
5. Click **Save**.

Setting the Default Department

If some of your users have access to multiple departments, you can indicate which department is shown by default when the user logs in to the Treeno system. Users can then change to a different department as needed by selecting from the Department drop-down at the top of the Treeno window.

Note: The Department drop-down is a Global Setting that you must enable to display in the Treeno window (see page 17). Users who have access to only one department will see the department name at the top of the window, but a drop-down will not be displayed.

To set the default department

1. Click the **Manage Departments** tab.
2. Click **Default Department**.
3. Select the department you want to appear by default and click **Save**.

Modifying a Department

You can change a department's name, as well as the users who are assigned to the department.

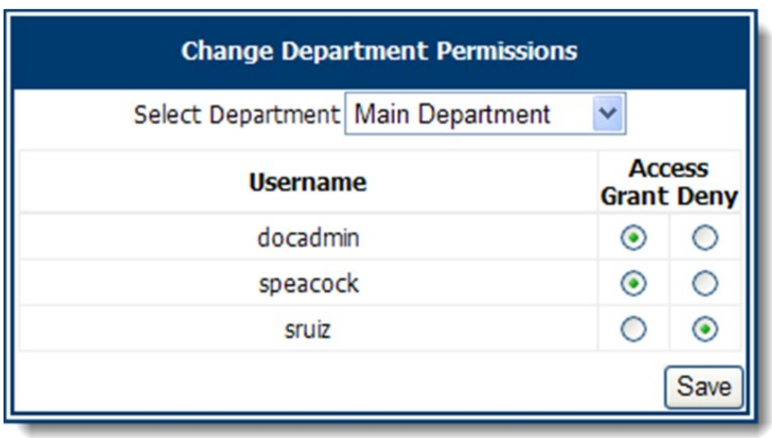
Changing the Department Name

1. Click the **Manage Departments** tab.
2. Click **Edit Department Name**.
3. Select the appropriate department.
4. Enter the new name and click **Save**.

Changing Department Permissions

1. Click the **Manage Departments** tab.
2. Click **Change Department Permissions**.

   The Change Department Permissions page opens.



3. Select the appropriate department.
4. For each user listed, click **Grant** to give the user access to the department, or click **Deny** to restrict the user from accessing the department.
5. Click **Save**.

Adding a Department Administrator

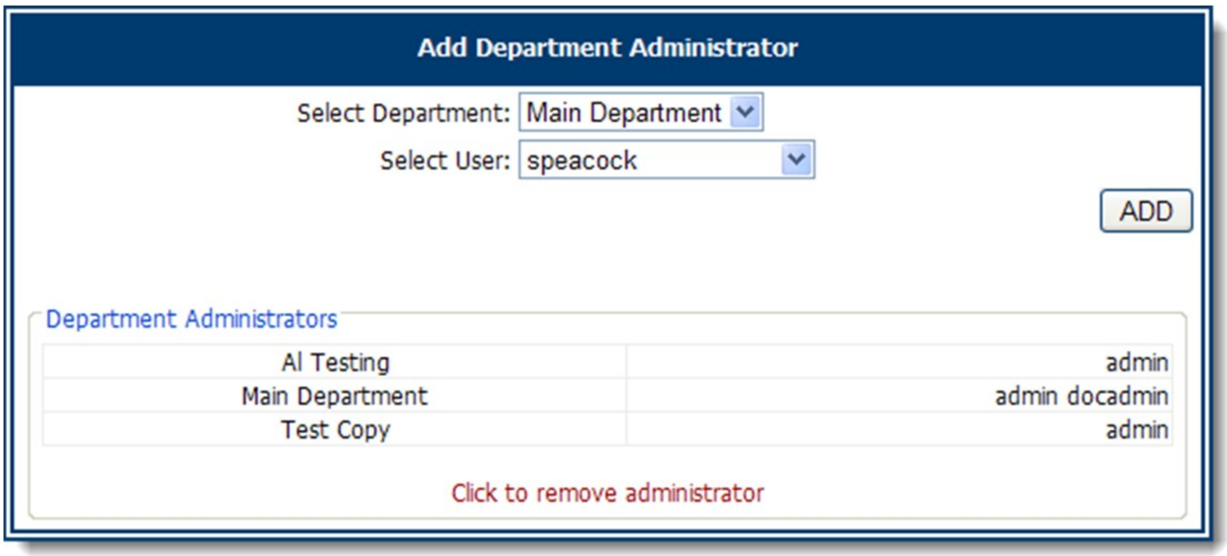
A single department can have multiple department administrators.

Note: Only a system administrator can create new departments.

To add a department administrator

1. Click the **Manage Departments** tab.
2. Click **Add Department Administrator**.

   The Add Department Administrator page opens.



3. Select a department.
4. Select the user you want to make the department administrator.
5. Click **Add**.

   The user is displayed next to the appropriate department in the Department Administrators area.
6. If you no longer want a user to be a department administrator, click the user's name in the list. The user is removed from the department as an administrator.

   Note: When you remove a user as a department administrator, the user continues to be a member of that department unless you restrict their access (see page 59).

Managing Department Licenses

Organizations using the Treeno Document Server can allocate the total number of purchased licenses across departments. Each department, then, has a defined number of concurrent licenses that cannot exceed the total number for the entire system. For example, if you have purchased 50 licenses to Treeno and allocated 10 of those licenses to your Human Resources department, only 10 HR users can be concurrently logged in to Treeno. No additional HR logins will be allowed until one of the 10 users logs out of the system. Users in the Accounts Payable department, however, will be allowed to log in while the 10 HR licenses are in use.

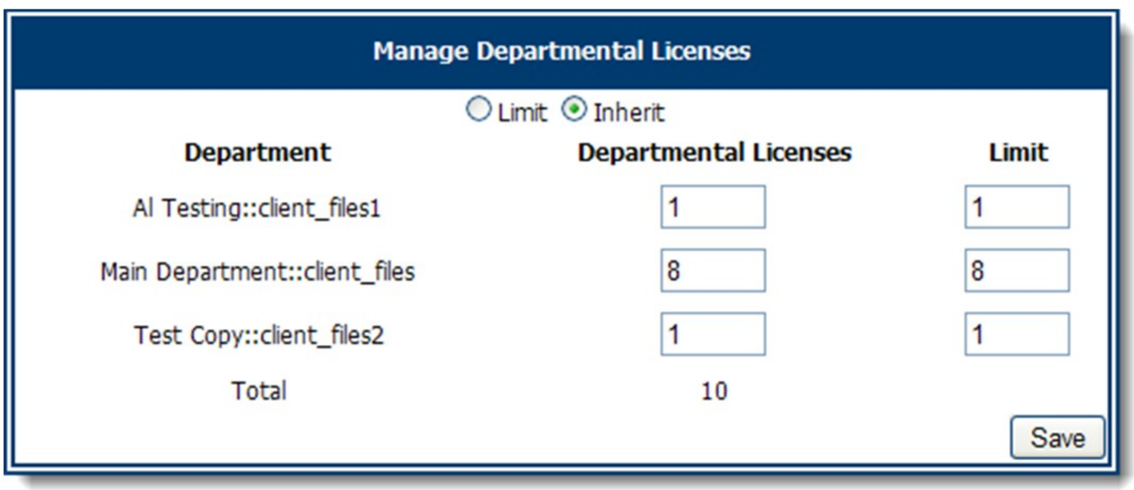
If you are using the Treeno SaaS deployment method, you have limited flexibility in the management of department licenses since only one department is typically allowed.

Note: Administrators can always log in to Treeno regardless of whether the maximum number of licenses has been reached. The user who has been logged in to the system the longest is "bumped" to allow for the administrator's login.

To modify department licenses

1. Click the **Manage Departments** tab.
2. Click **Manage Department Licenses**.

   The Manage Department Licenses page opens.



3. In the **Department Licenses** field, enter the number of licenses allocated to each department. The total number of department licenses cannot exceed the number of licenses purchased for your Treeno system.
4. In the **Limit** field, enter the number of allowed concurrent logins from each department. This number cannot exceed the number of licenses allocated to the department.

Note: Instead of performing steps 3 and 4, you can leave the Department Licenses field blank and enter a negative number in the Limit field. This automatically calculates the allowed number of concurrent logins from each department based on the total number of system licenses. For example, if you enter -2 in the Limit field for the Human Resources department and you have 50 system licenses, 48 concurrent logins from HR are allowed.

5. Click **Save**.

Managing System Information

Using the System Information tab, you can view which Treeno modules you have installed, add your organization's logo to the Treeno layout, and add new licenses that you have purchased.

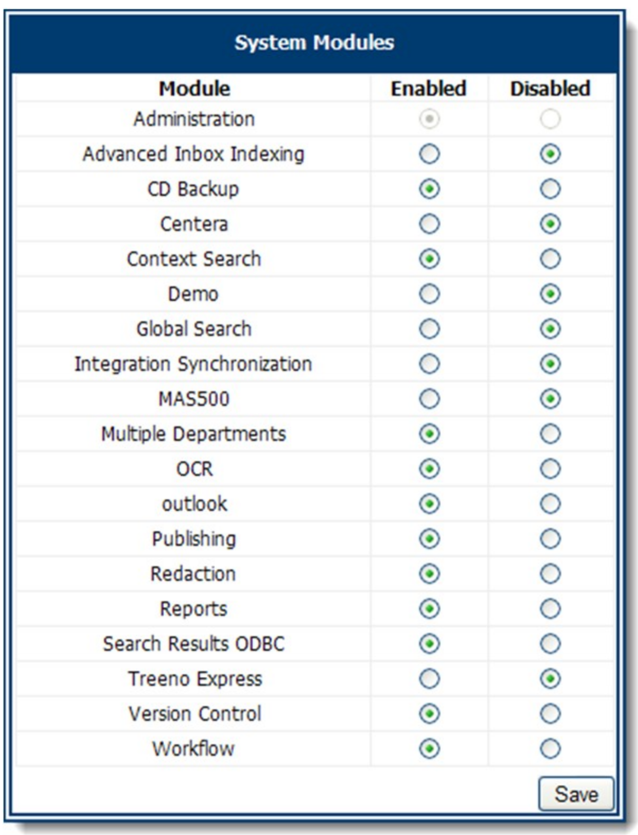
Viewing System Modules

The different modules available for the Treeno Document Server (in-house or SaaS) are displayed on the System Modules page. If you have purchased one or more licenses for a module, it is enabled for your Treeno system.

To view system modules

1. Click the **System Information** tab.
2. Click **System Modules**.

   The System Modules page opens.



3. Select **Enabled** for each module you have purchased.
4. Click **Save**.

Viewing Cabinet Information

Use the Cabinet Information page to view the total amount of disk space currently being used by your cabinets and the number of folders and files in each cabinet.

The Cabinet Information page is accessible from the **System Information** tab.

Storage Status	
Space Allowed:	2GB
Space Used:	38MB
Percent Used:	2%

Cabinet Status		
Cabinet	Folders	Files
AP	2	7
AR	3	6
Bills	0	0
Charity	0	0
CreditMemos	0	0
Customers	1	6
Employee Records	1	0
GL	0	0
Human Resources	2	4
Property	0	0
PurchaseOrders	3	0
Sample Cabinet	0	0
test	0	0
Total	12	23

Viewing License Information

Use the License Information page to view the number of Treeno licenses you have purchased, the number of users currently logged in to the system, and the names of those users.

The License Information page is accessible from the **System Information** tab.

Using the License Manager

This section is applicable only to in-house installations of the Treeno Document Server.

The License Manager is used to update your Treeno software with a new license. When you request a new license from your Treeno Support Representative, you will need to supply the MAC address of the server where the Treeno application is installed. The MAC address is displayed at the top of the License Manager page. Your Support Representative will send an e-mail that contains the requested license key.

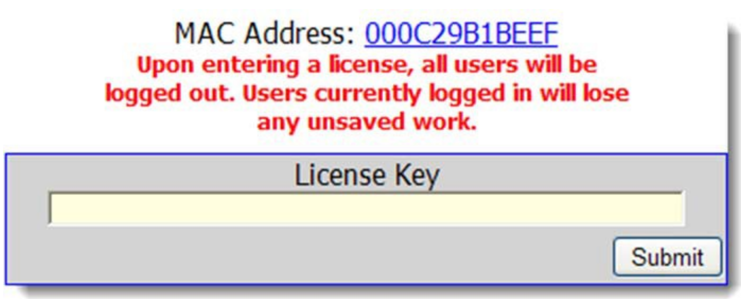
You must be a system administrator to enter a new license.

WARNING! All users must be logged out of the system before you enter a new license. Any users who remain logged in will lose their unsaved work.

To enter a new license

1. Click the **System Information** tab.
2. Click **License Manager**.

   The License Manager page opens.



3. Locate the license key in the e-mail you received from your Treeno Support Representative.
4. Copy and paste the license key into the License Manager.
5. Click **Save**.

Indexing

When you upload a file into Treeno, you describe the information it contains using *metadata* (that is, data about data). This metadata is stored with the file and enables users to search for and retrieve the file when needed.

The process of entering metadata is referred to as *indexing*. Depending on the way your cabinets are configured, you can index files in the following ways:

- **At the cabinet level** – When you create a new cabinet, you define the metadata that describes the folders contained in the cabinet. The folders in an Accounts Payable cabinet, for example, might be identified by the vendor name, date, invoice number, and amount due. When you add a file into the cabinet, you populate the required index fields for that cabinet. The file is then stored in a folder in the cabinet and can be retrieved by searching on those values.
- **At the document type level** - You can also index files at the document type level. A document type describes the unique content of a file, providing you with greater search capabilities. A Resume document type, for example, might include metadata for employee number, date of hire, position, and status. When you upload a file into Treeno, you enter index values for both the selected cabinet and document type.

Indexing can be done manually or automatically. You can index each file as it is uploaded, or you can upload multiple files to a bulk indexing location and batch process them at one time. Barcodes can also be used to route scanned files to a particular inbox or a cabinet where they wait to be processed.

Auto-Completing Index Fields

Index fields can be configured to automatically populate after a single value has been entered. For example, if you are indexing a file for an Accounts Payable cabinet, you could enter a purchase order number and have the amount, vendor, and description fields auto-populate. This data typically comes from a separate database, such as your accounting software. However, any application that allows you to export data can be used. You can then define the mapping between the exported data and the index fields in a selected cabinet.

The following data sources can be used to configure auto-complete indexing:

- Tab-separated text file
- ODBC connection
- Custom.php file

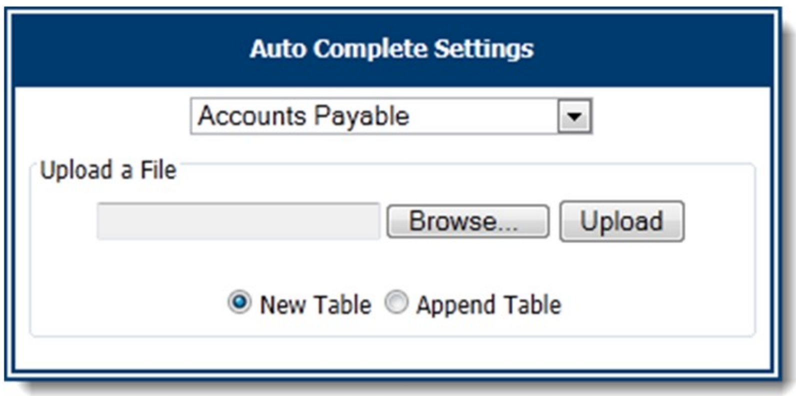
Auto-Complete Indexing Using a Text File

You can configure auto-complete indexing using a tab-separated text file that contains your exported data.

To configure auto-complete indexing using a text file

1. Click the **Indexing Settings** tab.
2. Click **Auto Complete Settings**.

   The Auto Complete Settings page opens.



3. Select the cabinet whose index fields you want to automatically populate. The data in this cabinet should correspond with the data in your exported text file.
4. Click **Browse** to navigate to and select the tab-separated text file you exported.
5. If this is the first time you have uploaded a file to this cabinet, select **New Table**. Otherwise, select **Append Table** to add the new file data to the cabinet's existing data.
6. Click **Upload**.
7. Click **OK** to verify that the order of the cabinet's index fields matches the order of the columns in the exported data.
8. Use the index drop-down lists to map the cabinet's index fields to the exported data columns.
9. Click **Save**.

Viewing the Auto-Complete Table

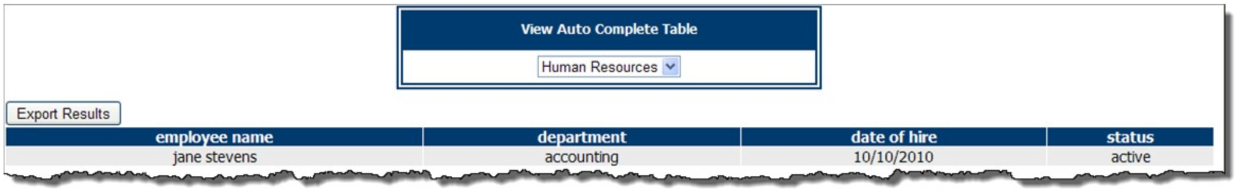
After you have associated a tab-separated text file with a cabinet, you can view how the data in the text file maps to the cabinet's index fields.

To view the Auto Complete table

1. Click the **Indexing Settings** tab.
2. Click **View Auto Complete Table**.

   The Auto-Complete Table page opens.

3. Select the cabinet whose mapping you want to view.



4. To export the mapping to a Microsoft Excel spreadsheet, click **Export Results**. You can then open or save the spreadsheet, as needed.

Auto-Complete Indexing Using ODBC

You can configure auto-complete indexing for a cabinet through an ODBC (Open Database Connectivity) connection between your database and the Treeno Document Server. This connection enables Treeno to access the database information needed to populate a cabinet's index fields after a user enters an initial value.

An ODBC connection must be established for each cabinet where you want to auto-complete index fields.

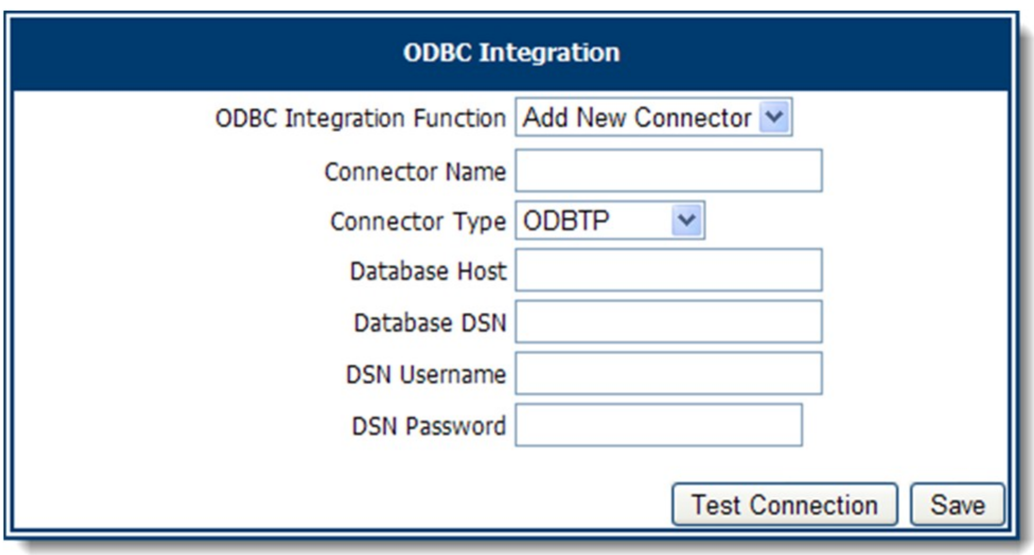
Adding an ODBC Connector

You need to set up each ODBC connector and configure how it will access your cabinet data.

To add an ODBC connector

1. Click the **Indexing Settings** tab.
2. Click **ODCB Integration**.

   The ODBD Integration page opens.



3. In the **ODBC Integration Function** drop-down list, select **Add New Connector**.
4. Enter the connector name.

5. In the **Connector Type** drop-down list, select the type of database you are connecting to. If your database is not shown in the list, select **ODBTP**.
6. In the **Database Host** field, enter the name of the server where the database is located.
7. In the **Database DSN** field, enter the name of the database.
8. Enter the username and password required to access the database.
9. To verify the connection using the information you have entered, click **Test Connection**. A message indicates if the connection is made successfully.
10. Click **Save**.

    The ODBC Integration Wizard opens.
11. Click **Next**.
12. Select the ODBC connector you just created.
13. Select the cabinet whose index fields you want to auto-complete via ODBC.
14. Click **Next**.
15. Select **Add/Edit**, and then click **Next**.
16. In the ODBC Table drop-down list, select the database table you want to access for the displayed cabinet.
17. Select **PK** (primary key) next to the table column that corresponds with the first index field in the cabinet.

    Note: A primary key is required. Only one primary key is allowed.
18. Select **FK** (foreign key) next to each table column that references another table within the same database. This makes the data from the other table available for the index auto-completing.
19. Select **Quoted** next to each table column that contains a string of text separated by spaces or commas.
20. Click **Next**.
21. Map each cabinet index field with a corresponding table column. The first index field must be mapped to the primary key you identified in step 17.
22. To check the accuracy of the mapping, enter a search value and click **Test Mapping**.
23. Click **Next**.
24. Click **Enable ODBC Mapping** and click **Next**.

    A message indicates if the ODBC connection has been made successfully.

Modifying an ODBC Connector

You can change the setup of an ODBC connector.

To modify an ODBC connector

1. Click the **Indexing Settings** tab.
2. Click **ODCB Integration**.

The ODBD Integration page opens.

3. In the **ODBC Integration Function** drop-down list, select **Edit Connector**.
4. Select the connector you are changing.
5. Modify the connector name, as needed.
6. In the **Connector Type** drop-down list, select the type of database you are connecting to.
7. In the **Database Host** field, enter the name of the server where the database is located.
8. In the **Database DSN** field, enter the name of the database.
9. Enter the username and password required to access the database.
10. To verify the connection using the information you have entered, click **Test Connection**. A message indicates if the connection is made successfully.
11. Click **Save**.

Modifying the ODBC Mapping

You can change or removing the ODBC mapping between a database table and a cabinet. Your changes will affect how auto-complete indexing is used in the cabinet.

To modify the ODBC mapping

1. Click the **Indexing Settings** tab.
2. Click **ODBC Wizard**.

   The ODBC Wizard opens.
3. Click **Next**.
4. Select the ODBC connector you are modifying.
5. Select the cabinet whose index fields are mapped to a table via ODBC.
6. Click **Next**.
7. Do one of the following:
   - Select **Add/Edit** to change the index mapping for the selected cabinet.
   - Select **Remove** to remove the index mapping for the selected cabinet.
8. Click **Next**.

   If you are removing the mapping for a cabinet, you are finished at this point. If you are modifying the index mapping, proceed to step 9.
9. Select the appropriate database table and make the necessary adjustments to the primary key, foreign keys, and quoted strings (see “Adding an ODBC Connector” on page 68).

   Note: A primary key is required. Only one primary key is allowed.
10. Click **Next**.

11. Map each cabinet index field with a corresponding table column. The first index field must be mapped to the primary key you identified in step 9.
12. To check the accuracy of the mapping, enter a search value and click **Test Mapping**.
13. Click **Next**.
14. Click **Enable ODBC Mapping** and click **Next**.

    A message indicates if the ODBC connection has been made successfully.

Auto-Complete Indexing Using a Custom.php File

A custom.php file can be used to convert and parse your data for auto-complete indexing. This method may provide the most flexibility for your Treeno implementation. Please contact Treeno Technical Support for assistance.

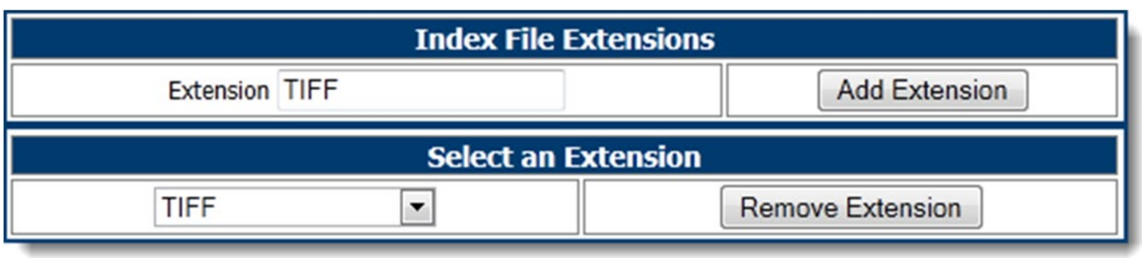
Adding File Extensions

You can specify which file extensions can be indexed into Treeno. Only those files with the allowed extensions are displayed to users when they use the Indexing command to batch process the files in a cabinet (see page 35).

The TIFF, TIF, and PDF file formats are displayed by default.

To add file extensions for indexing

1. Click the **Indexing Settings** tab.
2. Click **Index File Extensions**.



3. Enter the file extension and click **Add Extension**.
4. To prevent users from continuing to index a specific file format, select the extension and click **Remove Extension**.

Note: Only multi-page documents that are saved in TIFF/TIF format can be indexed as individual files. Multi-page documents in other formats (Word, PDF, etc.) are uploaded as a single file.

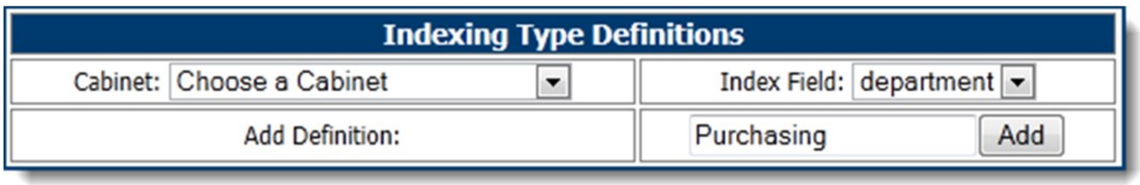
Adding Values to Cabinet Drop-Downs

You can format a cabinet's index fields as a drop-downs with predefined values so that users do not have to manually enter a value. This saves users time and prevents the possibility of data entry errors, which could skew search results.

To add values to cabinet drop-downs

1. Click the **Indexing Settings** tab.
2. Click **Indexing Type Definitions**.

   The Indexing Type Definitions page opens.



3. Select the appropriate cabinet.
4. Select the index field you want to add values to.
5. In the **Add Definition** field, enter the first index value, and then click **Add**.
6. Continue to add values to the index field, clicking **Add** after each entry.
7. To remove a value from the drop-down, in the **Delete Definition** drop-down list, select the value and click **Delete**.

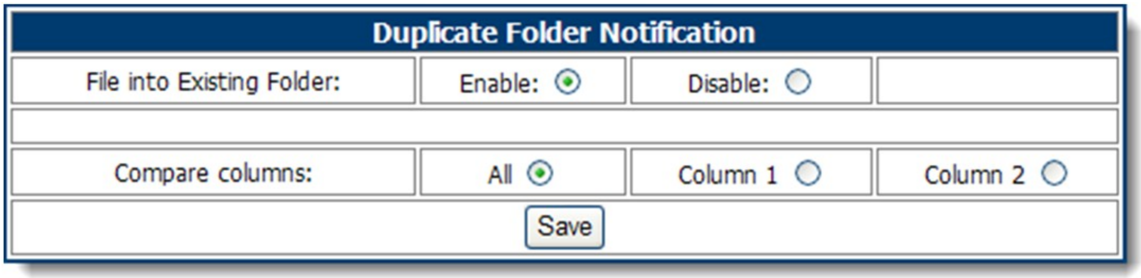
Duplicate Folder Notifications

A folder is created for each file that is added to Treeno. During the indexing process, files with the same index values may result in the creation of duplicate folders in a cabinet. You can alert users when a duplicate folder is about to be created so that they can choose to proceed with or cancel the folder creation. If they choose not to create a new folder, the file they are indexing will be saved in the existing folder.

To alert users to duplicate folders

1. Click the **Indexing Settings** tab.
2. Click **Duplicate Folder Notification**.

   The Duplicate Folder Notification page opens.



3. To alert users when a folder with the same index values already exists, select **Enable.** Users will be shown the following message when they are about to create a duplicate folder:

Users can then click **OK** to create the duplicate folder or click **Cancel**.

4. Specify which index values should be compared to determine when a folder is a duplicate: **All** values, the **Column 1** value, or the **Column 2** value.
5. To automatically allow the creation of duplicate folders, select **Disable**. Users will not be alerted with a message when they create a folder that already exists.
6. Click **Save**.

Managing Barcodes

One of the ways you can upload files into Treeno is by using barcodes. Barcodes enable you to store scanned paper documents in a specific location in the Treeno system, such as a folder, inbox, or document type. You can also use workflow barcodes that trigger a particular workflow when a document is scanned to Treeno (see page 95).

A printed barcode can be used as a cover sheet during the scanning process. The barcode sheet contains metadata information that is used to direct scanned documents to the correct location in the Treeno system. If you are scanning a large batch of documents at one time, you can print multiple barcodes and use them as separator sheets in the stack. The barcode on each separator sheet can send the scanned documents that follow to a different location in Treeno.

Two reports allow you to capture information about barcodes that were generated by Treeno:

- **Barcode History** – Lists barcodes that were printed and scanned.
- **Unprocessed Barcodes** – Lists barcodes that were printed but have not yet been scanned.

Configuring Barcode Settings

Before printing barcodes, you indicate how you want the barcodes to be read using the Barcode Settings page. The settings you choose determine how the scanned documents are stored in Treeno. You can scan documents as single-page TIFF files, multi-page TIFF files, or PDF files. These settings will override the format set on the scanning device. You can also choose to maintain the scanner's settings.

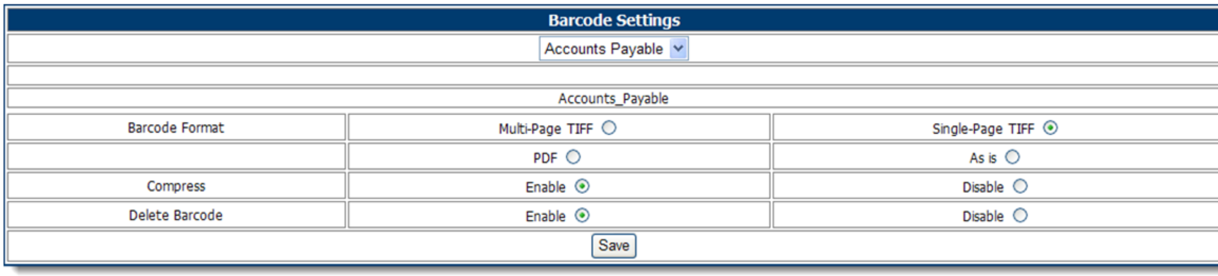
Treeno recommends storing documents as single-page TIFF files, which compress the most efficiently and allow for redaction and overlays. The single-page TIFF format also allows users to distribute individual pages of a document to a client rather than an entire folder. Users simply need to click the **PDF** icon to convert the individual pages to PDF format for easy export.

Note: All these settings can be configured using the Treeno File Monitor. If you are using the File Monitor to upload documents into the Treeno system, you do not need to perform the following procedure.

To configure barcode settings

1. Click the **Manage Barcodes** tab.
2. Click **Barcode Settings**.

   The Barcode Settings page opens.



3. Select a cabinet.
4. Select the format in which to store scanned documents in Treeno: **Multi-Page TIFF**, **Single-Page TIFF** (recommended), **PDF**, or **As Is**.

   The **As Is** option preserves the format selected on the scanning device.
5. To store uploaded files in a compressed format, select **Enable**.

   Note: Single-page TIFF files compress the most efficiently.
6. To delete the barcode when a new barcode is scanned, click **Enable**.
7. Click **Save**.

Printing Folder Barcodes

Users with the appropriate permissions can print barcodes that direct scanned documents to a specific folder. The user must have access to the barcode destination and have rights to printing barcodes (see page 15).

Unlike other barcode printing functions, folder barcodes are printed outside of Treeno Administration on the Document Center tab.

To print a folder barcode

1. On the Document Center tab, navigate to the folder where you want to store scanned documents.
2. In the **Select a File Action** drop-down list, select **Print Barcode**.

   The Print dialog box opens.
3. Click **Print**.

   The barcode is sent to your default printer.

Printing Inbox Barcodes

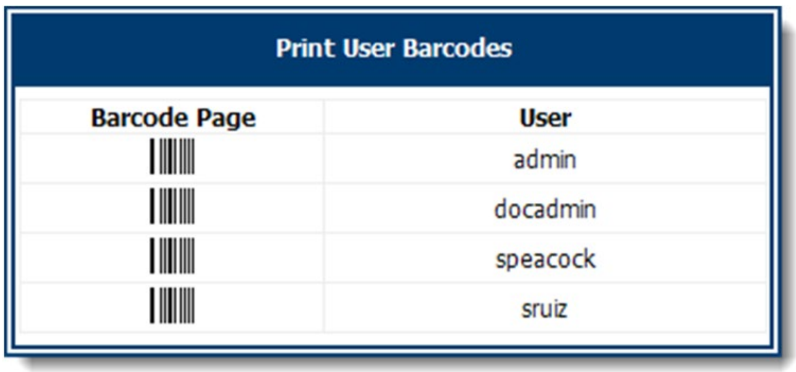
Users can print a barcode to another user’s personal Treeno inbox. They can then place the barcode cover sheet on top of a batch of documents and scan the barcode along with the documents. After the paper documents are converted to electronic files, they are automatically directed to the selected user’s inbox in Treeno.

Inbox barcodes can be used repeatedly to route scanned documents to the appropriate inboxes.

To print inbox barcodes

1. Click the **Manage Barcodes** tab.
2. Click **Print User Barcodes**.

   The Print User Barcodes page opens.



3. Click the **Barcode** icon next to the appropriate user.

   The Print dialog box opens.
4. Click **Print**.

   The barcode for the selected user's inbox is sent to your default printer.

Printing Workflow Barcodes

For information on printing workflow barcodes, see page 95.

Printing Miscellaneous Barcodes

Using the Print Any Barcode option, you can print a unique barcode that represents any user-defined text. Many organizations use this option to generate barcodes for document types within a folder. The barcode can then be used as a separator sheet during the scanning process. When the documents following the barcode are scanned, they are automatically stored in the designated document type within the folder.

The syntax for printing a document type barcode is: **TAB_<FOLDER_TAB>**. If the document type already exists in the folder, Treeno will route the scanned document directly to that tab. If the document type does not exist, Treeno will automatically create the tab in the designated folder (as determined by the unique folder barcode) and store the scanned document in that location.

For example, to send files to a document type named "Financial Docs", you would print this barcode: TAB_Financial_Docs.

Syntax requirements:

- The entire barcode must be capitalized.
- An underscore must be used between the word “TAB” and the name of the document type.
- If the name of the document type contains spaces, you must replace each space with an underscore.
- You must use the exact spelling of the document type in the barcode.

Document type barcodes can be reused if the top-level folders you are scanning to each have their own unique barcode (see page 75). For example, if you are scanning medical records for Patient A and Patient B, you would first print a unique barcode for your Patient A folder and another for your Patient B folder. Because both folders contain the same three document types—Registration, Patient History, and Insurance—you would then print just three document type barcodes (TAB_REGISTRATION, TAB_PATIENT_HISTORY, and TAB_INSURANCE) that could be used when scanning documents into either folder.

To print miscellaneous barcodes

1. Click the **Manage Barcodes** tab.
2. Click **Print Any Barcode**.
3. Enter the text that you want to represent as a barcode, and then click **Print Barcode**.

   The Print dialog box opens.
4. Click **Print**.

   The barcode is sent to your default printer.

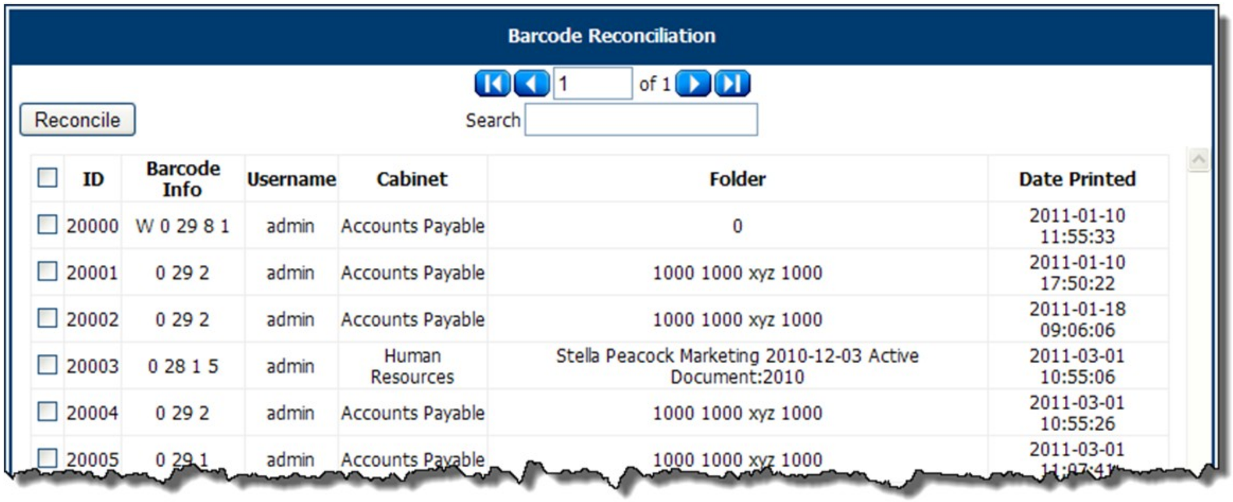
Viewing Unprocessed Barcodes

You can view a list of barcodes that were printed but have not yet been scanned. In addition to the name of the user who printed the barcode, the report indicates the date when the barcode was printed, and the name of the folder or document type the barcode was created for.

To view unprocessed barcodes

1. Click the **Manage Barcodes** tab.
2. Click **Unprocessed Barcodes**.

   The Barcode Reconciliation page opens.



Barcode Reconciliation

1 of 1

Reconcile

Search

	ID	Barcode Info	Username	Cabinet	Folder	Date Printed
☐	20000	W 0 29 8 1	admin	Accounts Payable	0	2011-01-10 11:55:33
☐	20001	0 29 2	admin	Accounts Payable	1000 1000 xyz 1000	2011-01-10 17:50:22
☐	20002	0 29 2	admin	Accounts Payable	1000 1000 xyz 1000	2011-01-18 09:06:06
☐	20003	0 28 1 5	admin	Human Resources	Stella Peacock Marketing 2010-12-03 Active Document:2010	2011-03-01 10:55:06
☐	20004	0 29 2	admin	Accounts Payable	1000 1000 xyz 1000	2011-03-01 10:55:26
☐	20005	0 29 1	admin	Accounts Payable	1000 1000 xyz 1000	2011-03-01 11:07:41

3. To delete an unprocessed barcode, select its check box and click **Reconcile**.

Viewing Processed Barcodes

A list of barcodes that were printed and scanned is available by clicking the **Barcode** link on the **Reports** tab. The Barcodes report is sent to your inbox as an Excel spreadsheet.

To view a list of processed barcodes

1. Click the **Reports** tab.
2. Click **Barcode**.
3. Enter the date range when the barcodes were scanned. You can also click the **Calendar** icon to open a pop-up calendar and select the start and end dates.
4. Click **Generate Report**.

   The report is sent to your inbox.
5. Click the **Inbox** icon to open your inbox.
6. Double-click the Barcodes report you want to view.

   The report name is formatted as follows: report<date and time created>.xls
7. Do one of the following:
   - Click **Open** to view the report in Microsoft Excel.
   - Click **Save** to save the report to a selected location. You can then open the spreadsheet at a later time.

Setting Up Workflows

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:

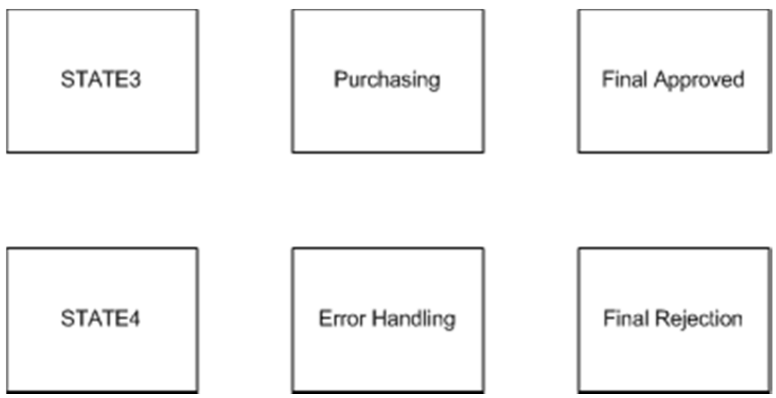
- Nodes and states

- E-mail notifications
- Workflow tasks

Nodes and States

When you configure a workflow in the Treeno system, you define the steps required to perform a business process. 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. Each workflow must end with a special Final node, which indicates that the document workflow has been completed.

Nodes are organized using *states*. One state, for example, might group the nodes related to approving an invoice (see STATE3 in the following image). Another state (STATE4) might then group the nodes related to error handling when there is a problem with the invoice. A state is required to begin a workflow; however, the primary purpose of a state is to help you organize your workflow. ***Documents should be routed to nodes only, not states.***

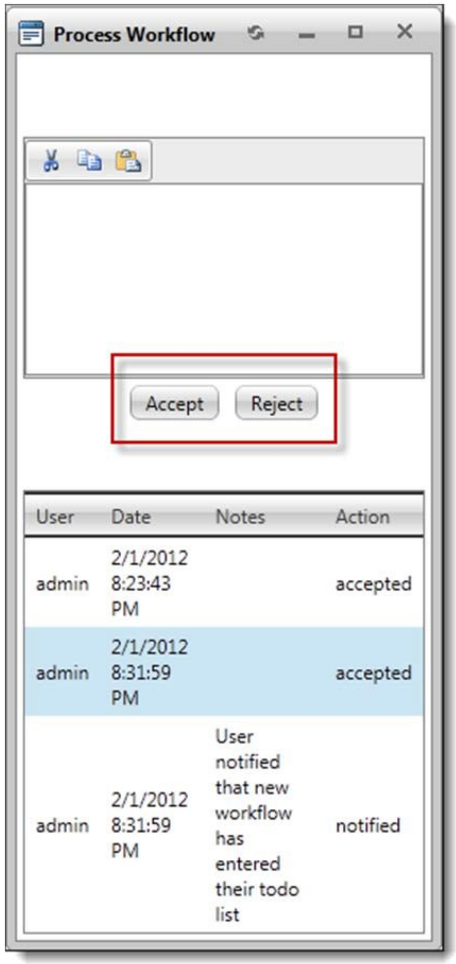


When you add a node to a workflow, you select the users or groups who are responsible for performing the task at that node. Users can be alerted when a document is waiting to be processed via an e-mail notification. They can also view their Workflow Tasks list at any time to see which documents are waiting in their queue.

The following types of nodes are available when you build your workflow in Treeno:

Signature

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



Value

A value node allows the user to select where the document should be routed based on a predefined list of options. When the user selects an option and clicks Accept, the document is routed to the appropriate node. For example, the 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.

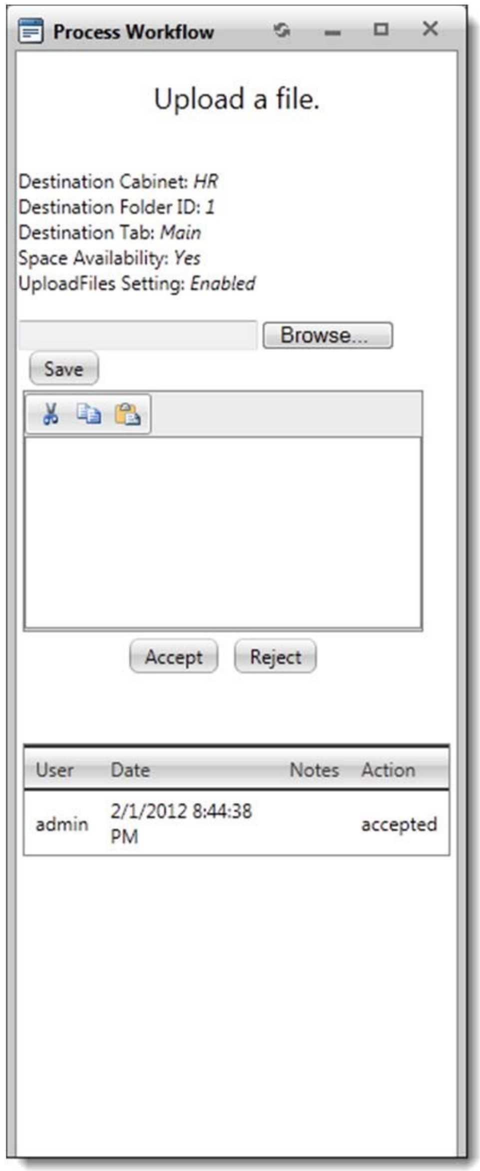
Unlike other node types (for example, a signature node), a value node does not have a Reject button. If you want to build error handling into the node, one of the options you define should be a node where rejected documents are sent.

Custom

A custom node collects data from a third-party application that is integrated with Treeno. For example, you could define a custom node that collects e-mail addresses needed to send confirmation messages to insurance policy applicants. Please contact your Treeno Support Representative to set up a custom node.

Upload File

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



Once the document has been added, the user can accept or reject it and route the document accordingly.

Indexing

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

Final

A final node completes the workflow. The workflow owner can receive an e-mail notification with a link to the document. This notification outlines the history of the workflow, noting each step and the actions taken.

A final node is a required step in every workflow. Some workflows may have two final nodes, one for documents whose final state is approved and another whose final state is rejected. Your reporting needs determine the number of final nodes in a workflow.

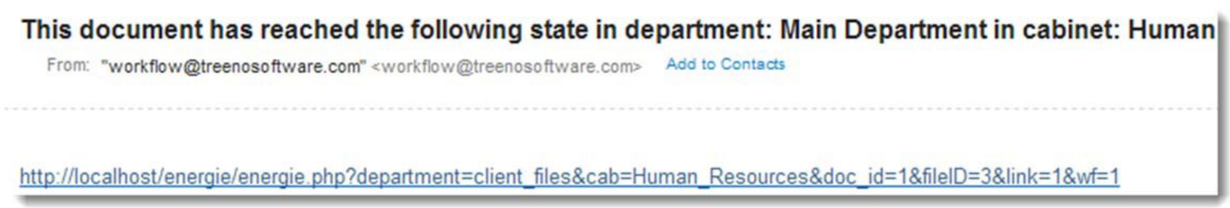
Note: Other nodes, such as Outlook, are available for specific integrations upon request. Please contact your Treeno Support Representative for information.

E-mail Notifications

If e-mail notification has been configured for a node (see page 91), an e-mail message is automatically sent to all users assigned to the node, alerting them that a document is waiting to be processed. After those users have processed the document, 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 (see page 92) each time the document is routed to a new node.

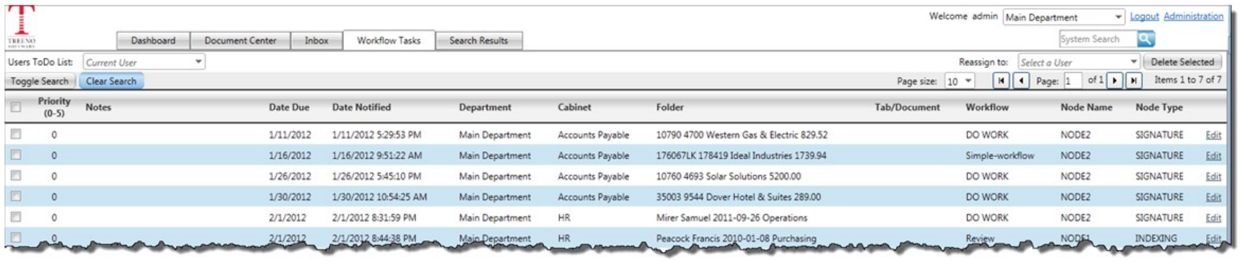
Each e-mail contains a link to the document. If the recipient is logged in to Treeno, clicking the link will take them directly to the document. Otherwise, the recipient will be required to log in to the system before viewing the document.



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 documents that are in your queue waiting to be processed. As a document moves to a node that is assigned to you, the document is added to your tasks list. Clicking an item in the list brings you to that document on the Document Center tab. Once you process the document 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	Allows you to view the task lists belonging to other users. You must have the appropriate permissions.
Reassign To	Allows you to 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.
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.

Area	Description
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.

For information on managing workflow tasks, see page 99.

Example Workflow in Treeno

An employee submits a purchase request for a new laptop. The paper document is scanned, and the file is uploaded into Treeno. When the file appears on the designated user's Workflow Tasks tab, it triggers the following Purchase Request workflow:

- An e-mail is automatically sent to an administrative assistant, notifying him that a new purchase request is waiting to be indexed (State1➔Index). The administrative assistance either clicks the link in the e-mail or opens his Workflow Tasks tab and clicks the waiting purchase request.
- The document opens on the Document Center tab. After reviewing the document, the administrative assistance clicks the **Process Workflow** link and does one of the following:
  - Clicks **Accept** to move the file to the Manager Review node in the workflow. This indicates the file was indexed successfully.
  - Clicks **Reject** to move the file to the Error Handling node in the workflow. This indicates that there was a problem with the purchase request, such as missing or incorrect information, which prevented it from being indexed.
- If the request has been successfully indexed, an e-mail is sent to one or more authorized managers, alerting them that a document is waiting for their approval (State2➔Manager Review). The manager either clicks the link in the e-mail or opens the Workflow Tasks tab and clicks the waiting purchase order.

- After reviewing the document, the manager clicks the **Process Workflow** link and does one of the following:
  - Clicks **Accept** to electronically sign off on the purchase request and move the file to the Purchasing node in the workflow.
  - Clicks **Reject** to move the file to the Error Handling node in the workflow. This indicates that there was a problem with the purchase request. For example, the request does not meet the company’s policy for hardware distribution.
- If the purchase request has received manager sign-off, an e-mail is sent to the Purchasing department, indicating that payment for the laptop has been approved (State3➔Purchasing). Once the purchase request has been processed in the accounting system, it is sent to the Final Approval node.
- If the purchase request is rejected anywhere along the workflow, an e-mail is sent to the administrative assistant, alerting him that a rejection notification needs to be sent to the employee who submitted the purchase request (State4➔Error Handling). The purchase request is then sent to the Final Rejection node.

The following image illustrates how this workflow would be configured in Treeno:

Sample Workflow

Before You Begin

Before creating a new workflow in Treeno, you need to answer the following questions:

- What is the business process that is being reflected in the workflow?
- How are you going to trigger the workflow (barcoding, Print to Treeno, Legacy Integrator, etc.)?
- What steps are required to perform the procedure? What is the first step that occurs? What is the last step?
- At which points is a document approved? At which points might it be rejected?
- If a document is rejected at a step, where should it be routed? In other words, how is exception handling implemented?
- Who performs the task at each step? Is this a single individual, or can any member of a group perform the task?

- When is the workflow complete?
- How do you want to report on the document? Do you want to know the status of the document when it completes the workflow (approved/rejected), or do you only need to know when it has reached the end of the workflow?

If you haven't already done so, it is highly recommended that you sketch your workflow on paper before you build the workflow in Treeno. Doing so will help you identify every possible step a document might need to pass through and the users who are involved in processing the document at each step.

Creating a New Workflow

Creating a workflow in Treeno involves two primary tasks:

- Building the workflow outline graphically
- Configuring each state and node in the workflow

Be sure to sketch your workflow on paper before you recreate it in Treeno.

Note: Only a system administrator or department administrator can create or edit a workflow.

Building the Workflow Definition

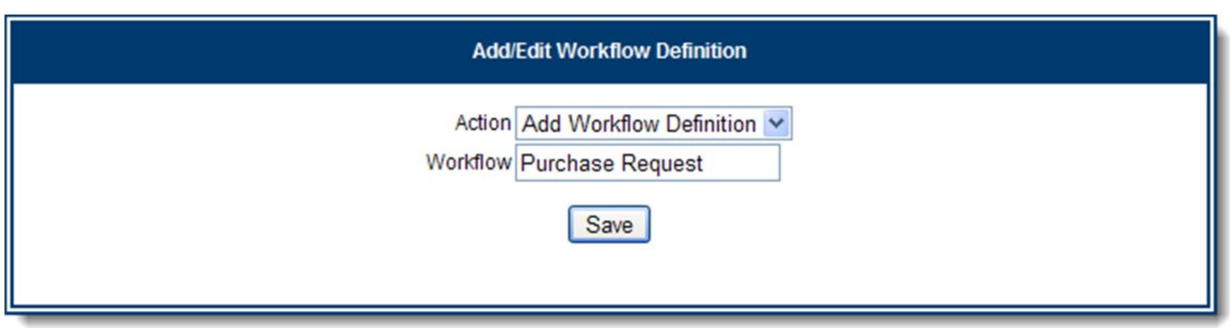
The workflow you build graphically using Treeno's user interface should reflect the workflow you sketched on paper. Most workflows will contain at least two states: one that groups nodes related to accepted documents and another that groups nodes related to error handling for rejected documents.

Each workflow must end with at least one final node (see page 84). For reporting purposes, you may want to have a final node for an "accept" state and another for a "reject" state.

To build the workflow definition

1. Click the **Workflow** tab.
2. Click **Create New Workflow**.

   The Add/Edit Workflow Definition page opens.



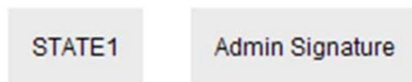
3. In the **Action** drop-down list, select **Add Workflow Definition**.

4. Enter the name of the workflow and click **Save**.
5. Click **Add State** to add the first state to the workflow.

   Each workflow must contain at least one state. The first state begins the workflow.
6. Click **Add Node** to add a node to the state you just created.

   The node is added to the state. For example:

7. Continue adding states and nodes until you have graphically represented the workflow outline. (See page 88 for a sample workflow).

Configuring Nodes

After you have represented your workflow graphically in the Treeno user interface, you are ready to configure the individual nodes.

Tip: As a best practice, you should review your workflow definition and determine which nodes represent your Reject nodes and Accept nodes. These are the nodes where documents are routed to when they are rejected or approved at other nodes. Then, plan on configuring the Reject/Accept nodes first so they are available to choose from during the configuration process.

To configure a node

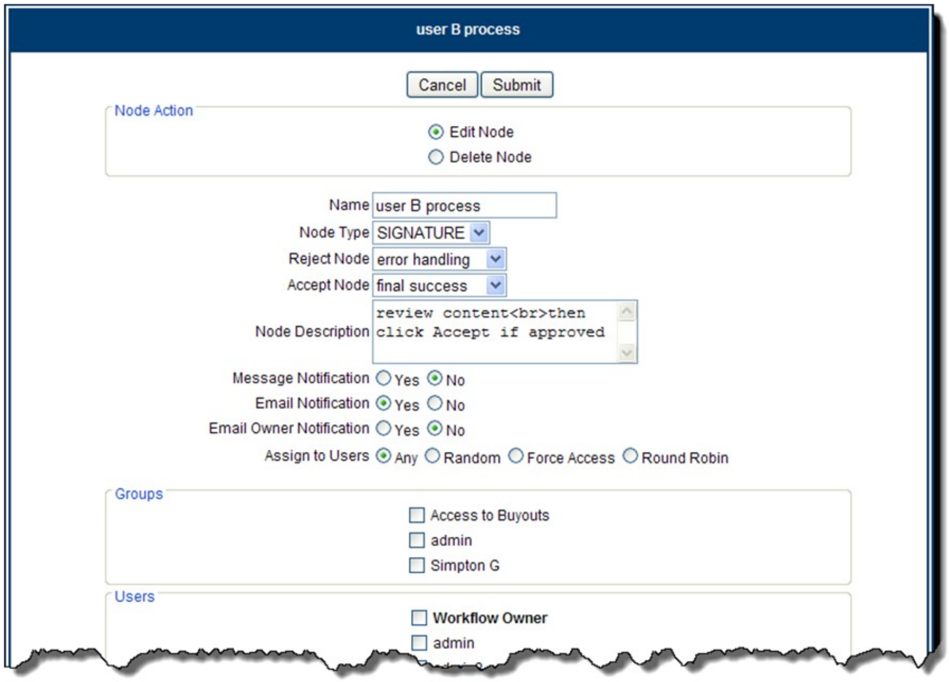
1. Click the **Workflow** tab.
2. Click **Edit Workflow**.

   The Add/Edit Workflow Definition page opens.
3. In the **Action** drop-down list, select **Edit Workflow Definition**.
4. Select the workflow whose nodes you want to configure.

   The workflow definition you built graphically (see previous procedure) is displayed.
5. Click a node.

   Note: You can click a state to assign a name to it. ***Do not make any other configuration changes to the states in your workflow.*** Documents should be routed to nodes only.

   The Node Details page opens.



6. Enter a name for the node. The name should represent either the type of task being performed (for example, Admin Signature, Index, or Manager Approval).
7. Select the node type. See page 80 for a description of each type.
8. Select a **Reject Node** and an **Accept Node**, which indicate where the document will be routed when it has been rejected/approved at the current node. The Reject/Accept nodes must have already been created to be displayed as options.

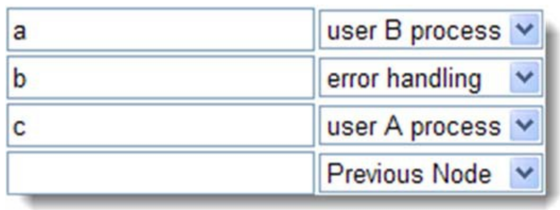
Note: Final and value nodes do not require you to select a Reject or Accept node.

9. In the **Node Description** field, enter the instructions you want displayed at the node. This text will be visible to each user processing documents at the node.
10. Select one or more notification options:
    - **Message Notification** - Select **Yes** to display the Node Description as a popup message when the user clicks the **View Workflow** icon. After the user has performed the instructions detailed in the message notification, they can send the document to the next node in the workflow.
    - **Email Notification** – Select **Yes** to send an e-mail notification to the user(s) assigned to the node that a document is waiting for their processing. The e-mail message will include a link to the document. If the user is currently logged in to Treeno, the document will be immediately displayed. If the user is not logged in, they will be prompted for the user name and password and then brought to the folder containing the document. Select **No** if you do not want to send an e-mail notification.

- **Email Owner Notification** – Select **Yes** to send the workflow owner (the user who started the workflow on the document) an e-mail notification when a document reaches the node. Select **No** if you do not want to send an e-mail notification.

11. If you are configuring a **value node**, you need to define the different options that are available to users to select from when they process a document. Each option represents a different node where users can route the document after they have finished working with it. Node options are displayed in the message notification that appears when the user views the document to be processed. Up to 10 options can be defined for each value node.

    In the following image, the user can select to route the document to the User B Process node (option a), the Error Handling node (option b), or the User A Process node (option c). Each of those nodes, in turn, can be a different type. For example, the User B Process node could be a signature node while the User A Process node could be an add file node.



12. Select an **Assign to Users** option:
    - **Any** – All selected users are notified and assigned to the document; however, once any one of the users has completed the node action, the workflow will progress. The document will be removed from the Workflow Tasks list of all selected users.
    - **Force Access** – Only users who have access to the cabinet where the document is stored will be notified and assigned. Please contact your Treeno Support Representative if you want to use the Force Access option.
    - **Round Robin** – Rotates through the list of selected users, assigning and notifying only one user at a time.
13. Assign users and/or groups to the current node.
    - **Groups** – Allows you to assign multiple users to the node with a single selection. The Assign to Users option you selected determines how many users in the group are required to process the document before it can proceed through the workflow.
    - **Users** – Allows you to assign individual users to the node. The Workflow Owner is the user who originally started the document in the workflow.
14. Click **Save**.
15. Repeat this procedure for each node in the workflow.

Modifying a Workflow

You can modify a workflow by changing its definition or any of its individual states/nodes.

To modify a workflow

1. Click the **Workflow** tab.
2. Click **Edit Workflow**.

   The Add/Edit Workflow Definition page opens.
3. In the **Action** drop-down list, select **Edit Workflow Definition**.
4. Select the workflow you want to modify.
5. Do one of the following:
   - To change the name of the workflow, click the **Rename Workflow** link and enter the new name.
   - To add a state to the workflow definition, click **Add State**. The state is inserted below the most recently added state in the workflow and numbered accordingly.
   - To add a node to the workflow definition, select the appropriate state click **Add Node**.

   - To change the details for a state/node, click the state/node to open the Node Details page. Modify the configuration as needed (see page 90). Click **Save**.

Deleting a Workflow

Please contact Treeno Technical Support if you need to delete a workflow or any of the states or nodes in a workflow. To maintain the integrity of the workflow dependencies, nodes and states must be deleted in a prescribed order, as determined by your Treeno Support Representative.

Viewing the Workflow History

The Workflow History provides a complete audit trail of documents as they move through a workflow. The report displays each of the workflow steps a document has passed through, the name of the user who performed the action, the date and time the action was performed, and any notes entered by the user.

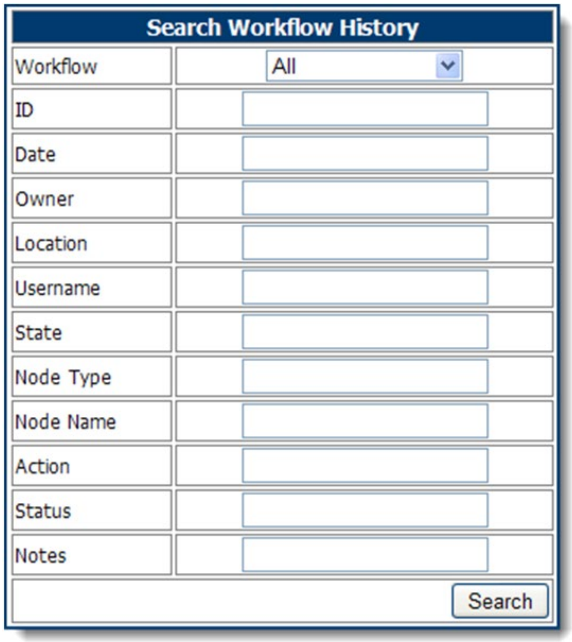
Note: Users can view the workflow history for the document they are currently processing. To view the workflow history for all documents in a department, you must have department administrator rights.

To view the workflow history

1. Click the **Workflow** tab.

2. Click **View Workflow History**.

   The Search Workflow History page opens.



3. Select the workflow whose audit trail you want to view. To view the history of all workflows, select **All**.
4. To search for documents that meet certain criteria, populate one or more of the following search fields:
   - **ID** - The system-defined number assigned to a workflow transaction.
   - **Date** - The date the document was assigned to a node.
   - **Owner** - The user who started the workflow.
   - **Location** - The department and cabinet related to the transaction.
   - **Username** - The user assigned to a node in the workflow.
   - **State** – The state where the document was processed.
   - **Node Type** – The type of node where the document was processed (for example, signature, value, or indexing).
   - **Node Name** - The name of the node where the document was processed.
   - **Action** – The outcome of the node processing (usually accept or reject).
   - **Status** – The status of the document at the node: Completed or In Progress.
   - **Notes** – Notes entered by users processing the document at the node.
5. Click **Search**.

The results of the search are listed in a table. If no search criteria are defined, information pertaining to all workflow nodes and their histories is displayed. A less specific view of this data can also be found attached to each workflow item as it's processed.

Date	Owner	Location	Username	State	Node Type	Node Name	Action	Status	Notes
005-03-15 13:41:17	admin	Cabinet: Folder: 1	wjt	1	SIGNATURE	NODE1	accept	COMPLETED	looks gooc
005-03-23 10:22:23	wjt1	Cabinet: patient files Folder: 3	admin	1	SIGNATURE	Admin Signature	accept	COMPLETED	this is grea
005-03-23 10:46:27	wjt	Cabinet: AP Folder: 7	bemis	1	SIGNATURE	NODE1	accept	COMPLETED	yes
005-03-23 12:02:37	admin	Cabinet: AP Folder: 12	admin	1	SIGNATURE	Admin Signature	reject	COMPLETED	needs fix...chang tab2 to tab22
005-03-23 12:03:20	admin	Cabinet: AP Folder: 12	admin	2	SIGNATURE	Fix Problem	accept	COMPLETED	changed tab2 to tab22
005-03-23 12:04:23	admin	Cabinet: AP Folder: 12	admin	1	SIGNATURE	Admin Signature	reject	COMPLETED	bad needs tab33
005-03-23 12:05:13	admin	Cabinet: AP Folder: 12	admin	2	SIGNATURE	Fix Problem	accept	COMPLETED	add tab33
005-03-23 12:05:25	admin	Cabinet: AP Folder: 12	admin	1	SIGNATURE	Admin Signature	accept	COMPLETED	i see all the tabs
005-05-20 13:19:36	admin	Cabinet: AP Folder: 8	admin	1	SIGNATURE	Admin Signature	reject	IN PROGRESS	Do not approve needs dec sheet
005-05-20 13:20:20	admin	Cabinet: AP Folder: 8	admin	2	SIGNATURE	Fix Problem	accept	IN PROGRESS	uploaded dec sheet

Printing Workflow Barcodes

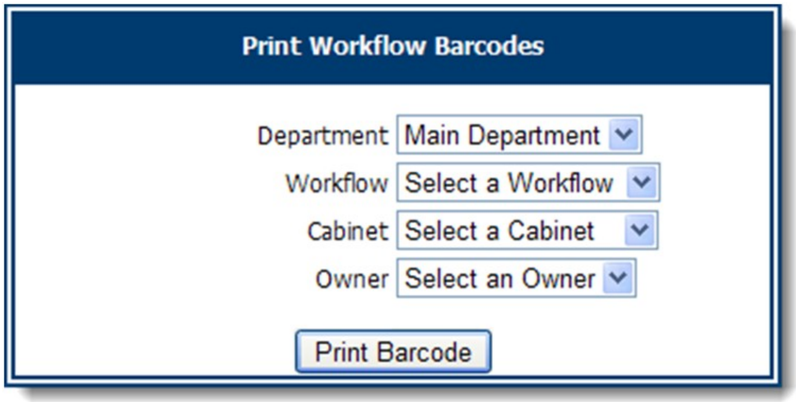
Users can print barcodes that trigger a workflow for one or more scanned documents.

Note: Using Global Settings, you can allow a user to access any cabinet to print a barcode that triggers a workflow (see page 16). If the user has not been granted access to that cabinet, the user's rights are restricted to scanning documents into the cabinet. The user cannot access the cabinet data.

To print workflow barcodes

1. Click the **Manage Barcodes** tab.
2. Click **Print Workflow Barcodes**.

   The Print Workflow Barcodes page opens.



3. Select the department where the workflow you want to start has been defined.
4. Select the workflow you want to start when the barcode is scanned.
5. Select the cabinet where you want the barcode to scan to.
6. Select the workflow owner. This is the user who will be scanning the barcode and starting the documents in the workflow.
7. Click **Print Barcode** to open the Print dialog box.
8. Click **Print**.

   The barcode is printed and added to the Unprocessed Barcodes table (**Manage Barcodes > Unprocessed Barcodes**).

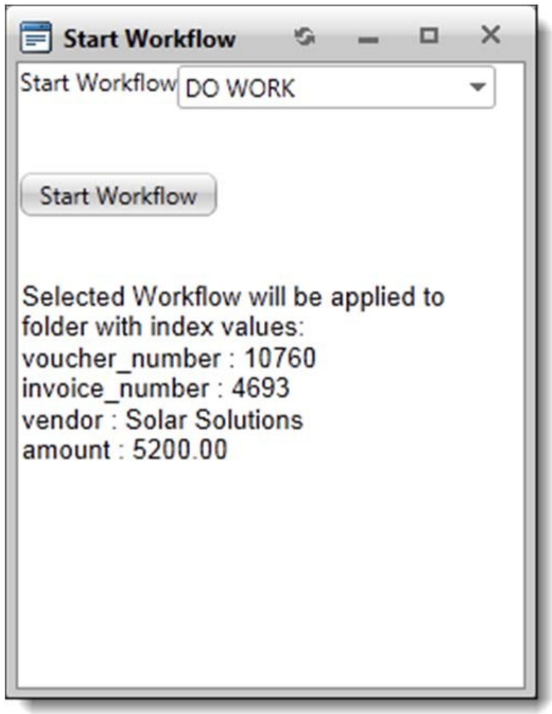
Starting a Workflow

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 document 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.

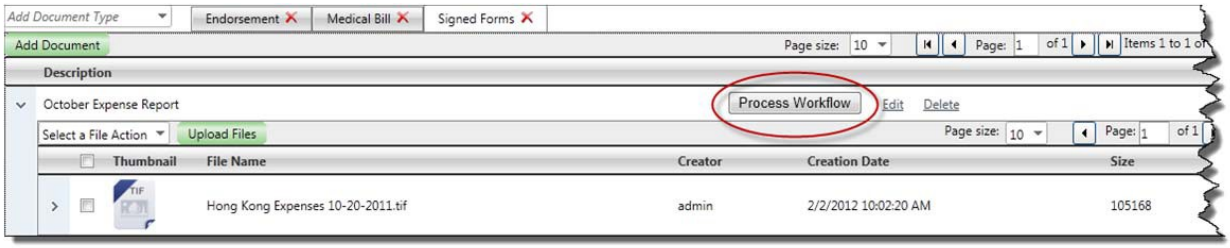
Processing a Workflow Task

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

1. On the **Workflow Tasks** tab, click the document 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).

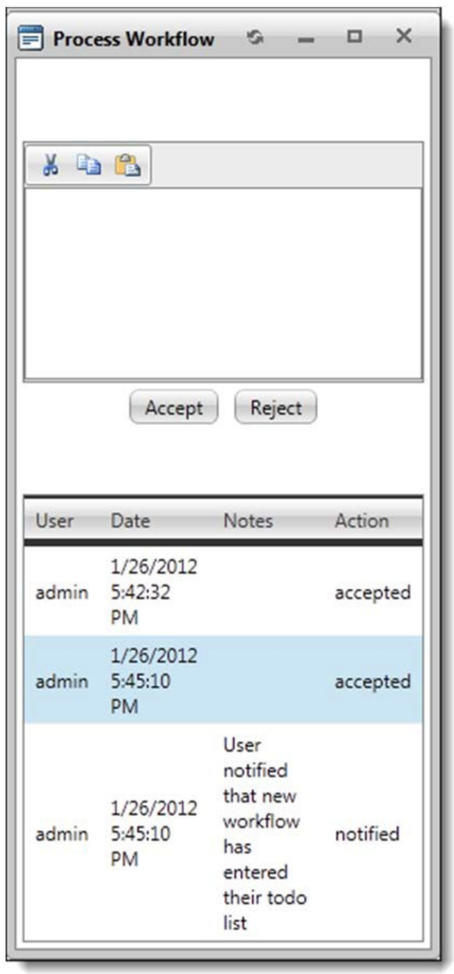
Workflow task for a folder



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 80 for information on different node types.

When you are finished with your action, the window closes, and the document automatically moves to the next node in the workflow. 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.

Managing Workflow Tasks

Use the Workflow Tasks tab to manage the documents that have been placed in your queue for processing. From this tab, you can filter, reassign, and delete workflow tasks, as well as edit task details.

Filtering Workflow Tasks

1. On the Workflow Tasks tab, 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.

   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.

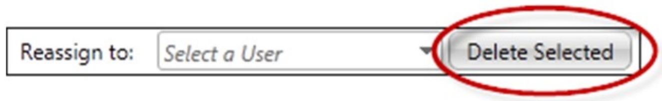
Reassigning Workflow Tasks

The **Reassign To** drop-down list on the Workflow Tasks tab 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.

Deleting Workflow Tasks

1. On the Workflow Tasks tab, 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 not prompted to confirm the deletion.



Editing Task Details

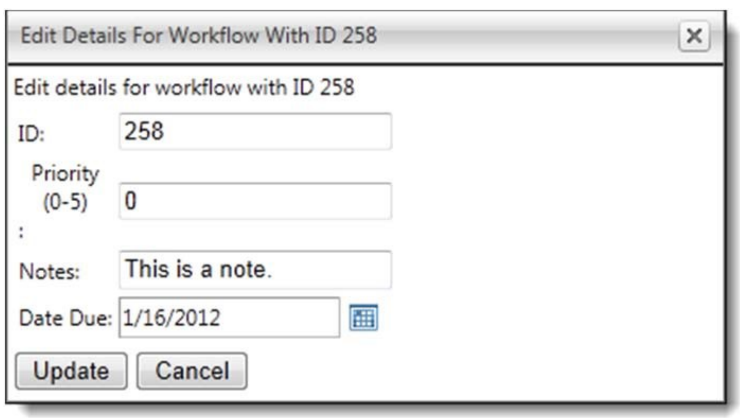
Using the Edit Details for Workflow window, you can edit the following information for a workflow task:

- **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. On the Workflow Tasks tab, 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.

Publishing

You can publish documents to a secure web portal that allows users outside of your organization to view and collaborate on those documents. Your organization controls access to the publishing portal. External users must authenticate to gain access to the portal, and they can view only those documents that have been assigned to them. For example, when determining policy coverage, an insurance company may need outside vendors to review accident claims. Rather than e-mailing the claims, the insurance company can publish them to the Treeno web portal and grant the appropriate vendors access to the documents.

Likewise, if you need to receive documents from your customers or partners, you can grant them the ability to upload files through the portal. Incoming files can be stored in a specific Treeno cabinet for processing or automatically enter a selected workflow.

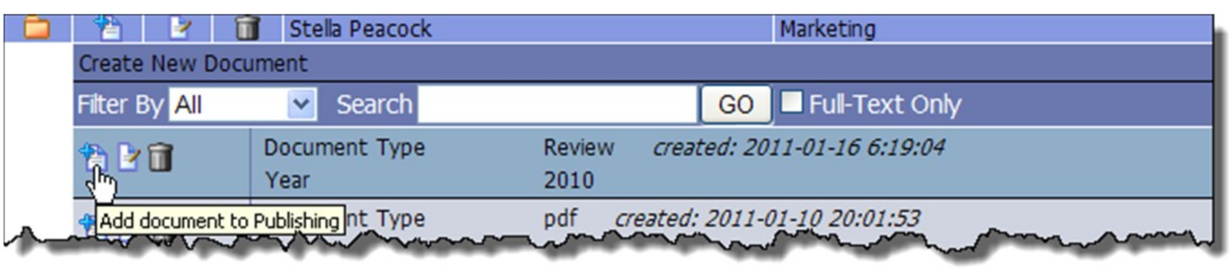
Publishing Process

With the appropriate permissions, users can manually publish individual documents or entire folders to the publishing portal. As an administrator, you can also auto-publish documents. Each time a document is added to Treeno that meets the designated criteria, it is automatically added to the publishing portal and available to the appropriate external users.

Manual Publishing

Treeno users who have been granted publishing rights (see page 107) can manually upload a document or an entire folder to the external web portal. The **Publishing** icon is displayed next to a document or folder in the cabinet where the permissions have been granted. When a Treeno user needs to publish an item to the web portal, the following process occurs:

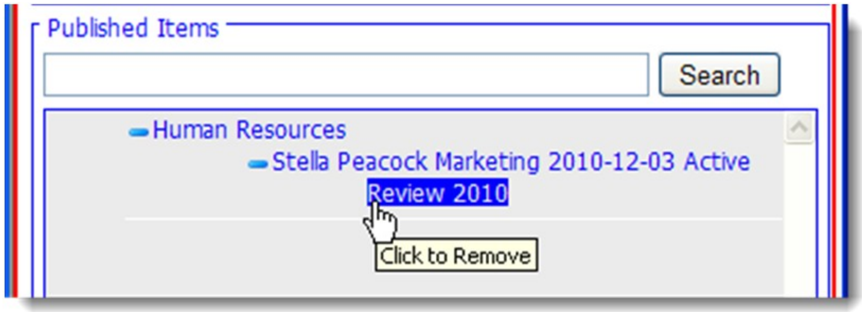
1. The user clicks the **Publishing** icon next to the document or folder.



2. The Publishing Wizard opens.

   The top half of the wizard displays a list of external users who are allowed to access the web portal.

3. The user clicks one or more external users to select them as recipients of the document. Green highlighting indicates when a user has been selected.
4. If the external user is not displayed, the Treeno user can click **Create New User** and add the appropriate e-mail address. The external user is then granted access to the web portal via an e-mail notification with a temporary password that must be changed during the initial login to the portal.
5. The bottom half of the wizard displays the cabinets where items have been selected for publishing. The publishing user can click the plus sign (+) next to each cabinet and folder to view the selected documents.
6. To remove a document from publishing, the user clicks the document link in the **Published Items** list. The user can also click a folder link to remove the folder and all its contents from publishing.



Note: When drilling down to a document in the Published Items list, make sure you click the plus sign (+) next to each cabinet and folder. Clicking the actual name of the cabinet or folder will remove it and all its contents from the Publishing Wizard.

7. If the user wants to publish additional items, they can open the appropriate cabinet and select the items while leaving the Publishing Wizard open. The wizard will display items as they are added.
8. The user clicks **Finish** when all items have been added to the Publishing Wizard.
9. An e-mail notification is sent to the external users selected in the wizard, alerting them that documents are waiting to be reviewed in the publishing portal.

10. The external users access the documents by clicking the link provided in the e-mail message. A user name and password are required to enter the publishing portal. If this is the first time an external user has received a notification, an account is created for them and they are e-mailed a temporary password. When the external user logs in to the portal, they are prompted to change this password.
11. The external user clicks the **Published Searches** link in the portal to view and download the document. The document will remain available in the portal until its set publishing time has expired. After that, the external user will no longer be able to access the document.
12. If permission has been granted, the external user can also upload a document to the portal and designate a Treeno user as the recipient (see page 110). The user clicks the **Publish Files** link in the portal, uploads the document, and selects a Treeno user. The Treeno user then receives an e-mail notification with a link to the document. Documents that are uploaded from external users can be stored in a designated cabinet within Treeno or they can be sent to the first node in a selected workflow (see page 79).

Automatic Publishing

Administrators can set up auto-publishing for documents that meet specific criteria. Each time a document in Treeno meets the designated publishing criteria, it is automatically added to the web portal. External users do not receive an e-mail notification when a document has been added to the publishing portal. Instead, they must log in to the portal on a regular basis to see the latest documents that have been published.

While the Publishing Wizard is used to manually publish documents, you set up auto-publishing using the Publishing Functions tab in Administration.

1. Use the Auto-Publishing page to define the criteria that determine which documents are published. These criteria include the document's cabinet and index value. You also enter a name that identifies the batch of published documents.
2. Use the Edit External User page to select the external user who should have access to the documents in the publishing portal. If the user does not yet exist in Treeno, add them using the Add External User page. You can also use either page to give the external user permission to upload documents to the portal.
3. If external users are allowed to upload documents to the publishing portal, use the Publish Workflows/Uploads page to identify the Treeno user who should be notified when a document has been added to the designated Publishing cabinet.
4. If you want a document to enter a workflow when an external user publishes it to the portal, use the Publish Workflows/Uploads page to select the workflow. When a document is uploaded to the publishing portal, it is automatically sent to the first node in the workflow, and a workflow item is added to the Workflow Tasks list for the appropriate the Treeno user.

Publishing Portal

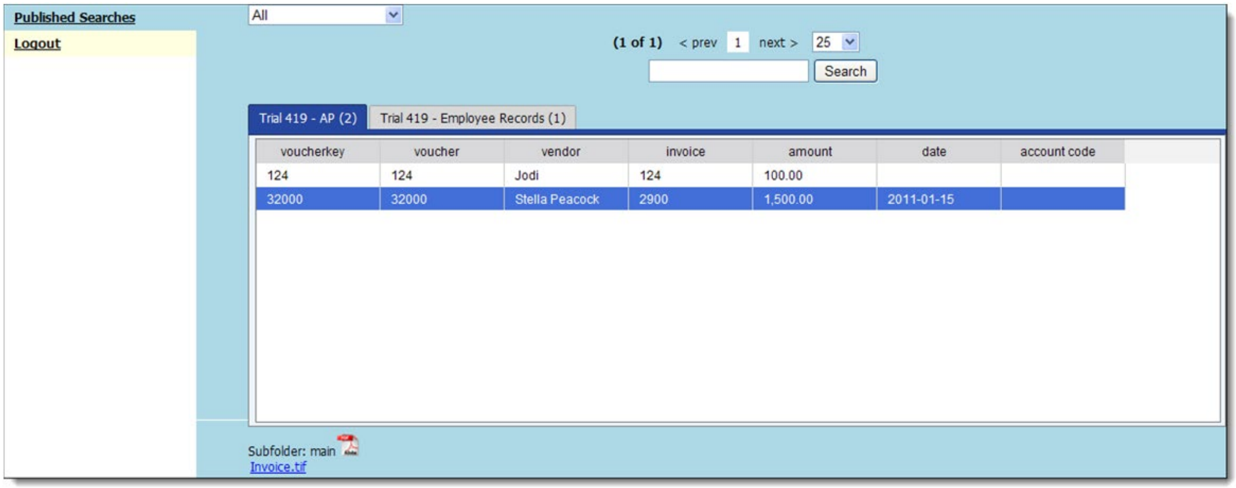
The web-based publishing portal requires external users to enter a user name and password to log in. When an external user is added to Treeno, they receive an e-mail notification with a user name and temporary password. The first time the user logs in to the publishing portal, they are required to change their password.

By default, the publishing portal displays two links in the left-hand navigation pane: **Published Searches** and **Logout**. If the external user has been granted permission to upload documents, an additional link, **Publish Files**, is displayed. If a publishing workflow has been assigned to the user, a **Start Workflow** link is also displayed.

Viewing Published Documents

1. Log in to the Treeno publishing portal. If this is the first time you are logging in to the portal, enter the user name and temporary password that were e-mailed to you. You will be prompted to change the password.

   The secure publishing portal opens.



2. Click the **Published Searches** link in the left-hand pane.

   Published documents are organized by department and cabinet. Information about each document is provided in its index fields. In the preceding image, for example, the selected document is in the Trial 419 department and the AP cabinet (as indicated by the highlighted tab). Its index fields indicate this is invoice #2900 from Stella Peacock in the amount of $1,500.00.

3. Locate the document that you want to view by doing one of the following:

   - Click another tab to change the department and cabinet.
   - In the search field, enter the index value you want to search by, and then click Search.
   - Select a different batch of auto-published documents (see page 104) from the drop-down list at the top of the portal window.
   - Browse through all published documents using the **<Prev and Next>** links. You can also specify the number of published documents displayed at one time using the drop-down list next to these links.

4. In the grid, click the document that you want to download.

   The link for the document is displayed below the grid.

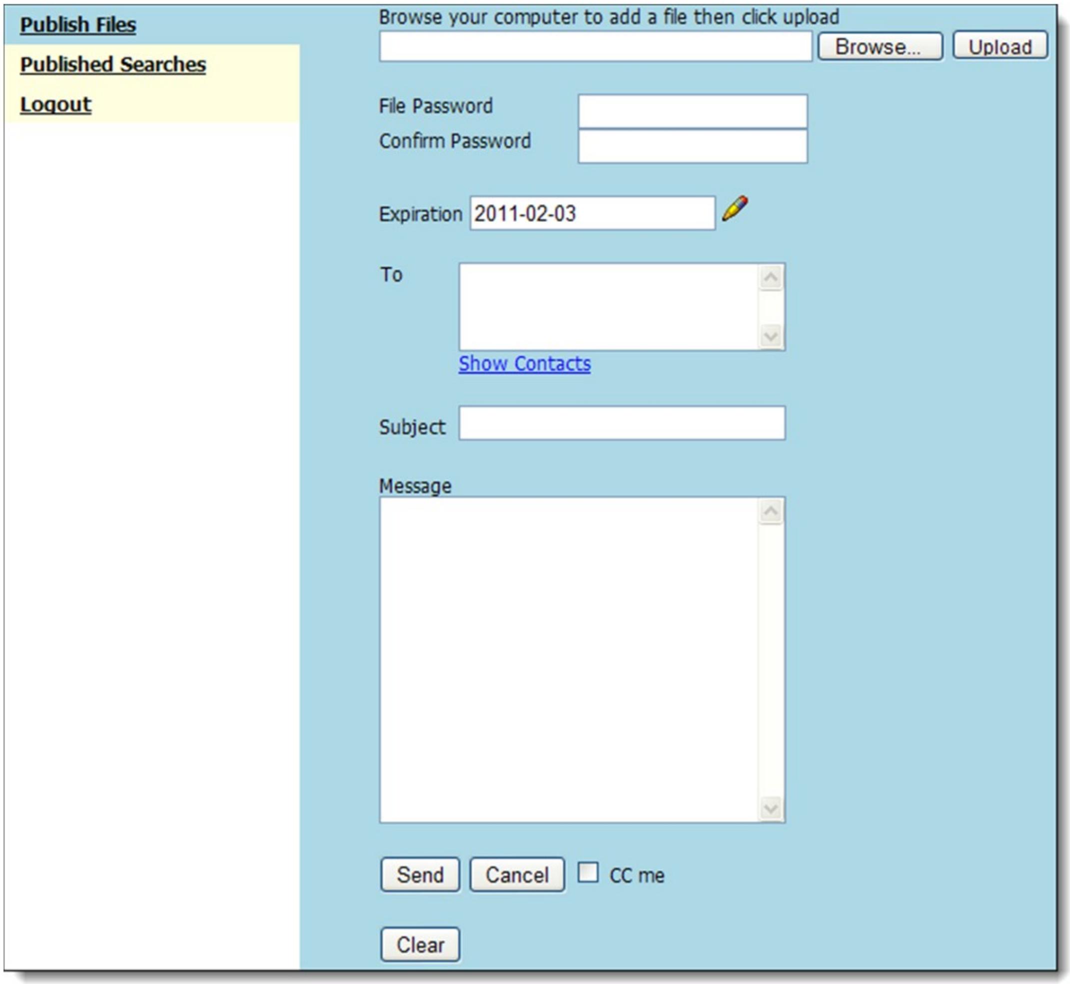
   Note: If the Treeno user published an entire folder, clicking the folder in the portal will display all documents available to download.

5. Click the document link, and then click **Open** to view the document or **Save** to save the document before viewing it.

Uploading Documents to the Portal

1. Log in to the Treeno publishing portal. If this is the first time you are logging in to the portal, enter the user name and temporary password that were e-mailed to you. You will be prompted to change the password.

   The secure publishing portal opens.



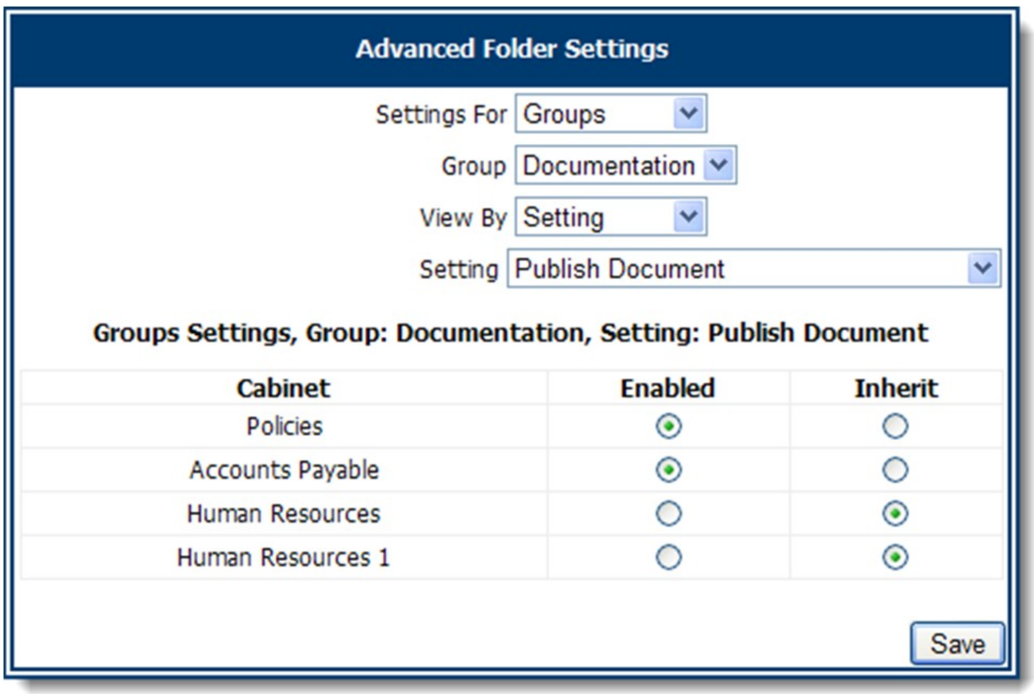
2. Click the **Publish Files** link in the left-hand pane.
3. Click the **Browse** button to select the document for publishing. The path to the document is displayed.
4. Click **Upload** to add the document to the portal.
5. To password-protect the document, enter and then confirm the password. The password will be provided in the e-mail notification that is sent to the designated Treeno user.
6. Click the **Calendar** icon next to the **Expiration** field to open the pop-up calendar. Select the document's expiration date. This indicates how long the document will be available in the portal.
7. In the **To** field, enter the e-mail address for the Treeno user or click **Show Contacts** to select the user's e-mail address.
8. Enter the subject of the e-mail notification, and then enter any text you want shown in the body of the notification.
9. To send the notification to yourself as well, select the **CC Me** check box.
10. Click **Send**.

Assigning Publishing Permissions

Treeno users must be assigned the appropriate permissions to publish documents to the publishing portal. These permissions can be granted at the group or user level for all cabinets or selected cabinets.

To assign publishing permissions

1. Click the **System Preferences** tab.
2. Click **Advanced Folder Settings**.
3. In the **Settings** For drop-down list, select **Groups** or **Users**.
4. Select the appropriate group or user.
5. In the **View By** drop-down list, select **Setting**.
6. In the **Setting** drop-down list, select **Publish Document**.
7. Select **Enabled** next to each cabinet where you want users to be able to publish documents to the web portal.



8. Click **Save**.
9. In the **Setting** drop-down list, select **Publish Folder**.
10. Select **Enabled** next to each cabinet where you want users to be able to publish folders to the web portal.
11. Click **Save**.

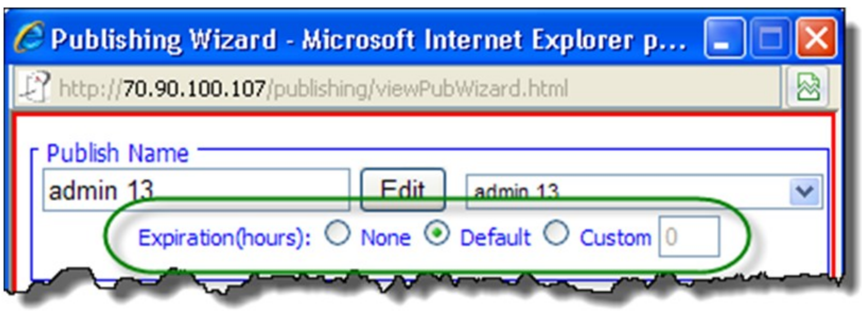
Setting the Publishing Time Expiration

Published documents can be set to expire after a designated amount of time. When a document has expired, it no longer appears in the Treeno web portal and cannot be accessed by an external user.

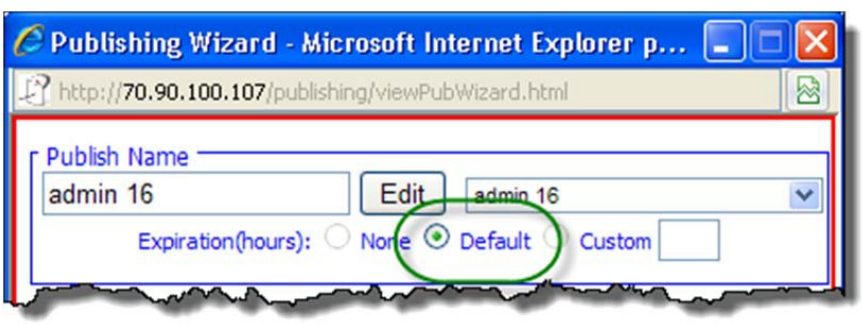
A document's expiration time is displayed in the Publishing Wizard. Two global permissions (see page 18) can be enabled to set the publishing expiration:

- **Force Published Searches to Expire** – Enable this option to force published documents to expire. You can set a default expiration time (in hours), which can be automatically applied to all published documents. You can also let users specify a custom expiration time (in hours). Both the Default and Custom options are displayed in the Publishing Wizard.

  When Force Published Searches to Expire is disabled, the **None** expiration option becomes available in the Publishing Wizard. When this option is selected, published documents will remain available in the web portal until the maximum time has been reached.



- **Force Publishing Default Expire Time** – Enable this option to automatically apply a default expiration time to all published documents. No other expiration options are available in the Publishing Wizard.



To set a publishing expiration time

1. Click the **System Preferences** tab.
2. Click **Global Settings**.

   The Global Settings page opens.

3. In the **Settings For** drop-down list, select **System**.
4. In the **Setting** drop-down list, select **Force Published Searches to Expire**.
5. Select **Enabled**, and then click **Save**.
6. Do one of the following:
   - To force a default expiration time on all published documents, in the **Setting** drop-down list, select **Force Publishing Default Expire Time**. Select **Enabled**, and then click **Save**.
   - To allow users to specify a custom expiration for each published document, proceed to step 7.
7. Click the **Publishing Functions** tab.
8. Click **Set Publishing Expiration**.
9. Enter the default expiration time, in hours, for published documents.

   If Force Publishing Default Expire Time is enabled in Global Settings, the default time you enter will be applied to all published documents. Otherwise, users will have the option of selecting the default time or entering a custom time in the Publishing Wizard.
10. Enter the maximum expiration time in hours. This is the maximum amount of time a published document will be available in the Treeno web portal. This is the value that will be used when users select the **None** expiration option in the Publishing Wizard.
11. Click **Save**.

Managing External User Accounts

An external user is an individual outside of your organization who has permission to access designated documents in the Treeno web portal. When a document has been published to the external user, the user receives an e-mail with a link to the portal.

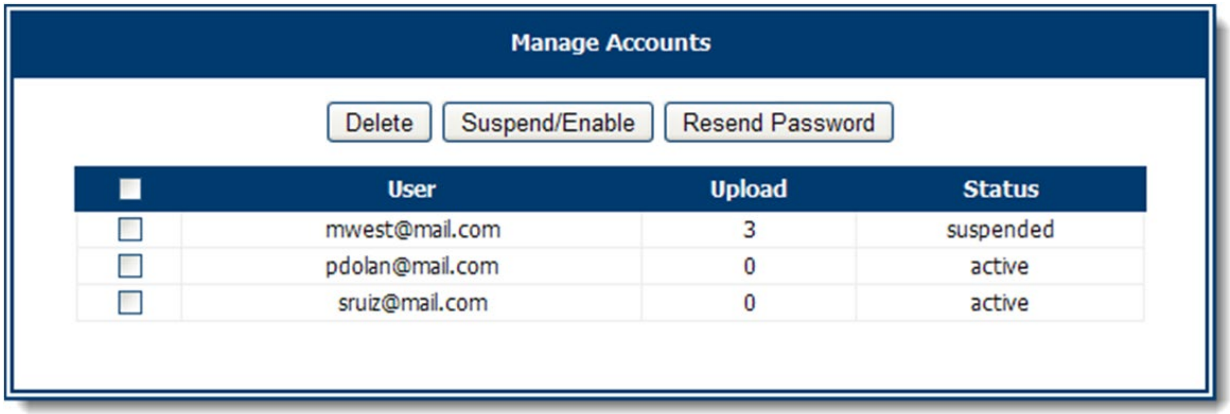
If this is the first e-mail notification the user has received, an account is automatically created for them. The user is then sent a temporary password via e-mail which must be changed upon initial login to the portal.

You can delete or suspend an external user account. You can also send a new temporary password to an external user.

To manage user accounts

1. Click the **Publishing Functions** tab.
2. Click **Manage Accounts**.

   The Manage Accounts page opens.



3. Select the check box next to the appropriate user account.
4. Do one of the following:
   - Click **Delete** to remove the account. If necessary, the account can be added again using the Publishing Wizard.
   - Click **Suspend/Enable** to suspend an active account and prevent the external user from logging in to the publishing portal. The account status is shown as Suspended.
   - Click **Suspend/Enable** to activate a suspended account. The account status is shown as Active.
   - Click **Resend Password**. A new temporary password is e-mailed to the external user. The user will be prompted to change the password when they log in to the Treeno web portal.

Auto-Publishing

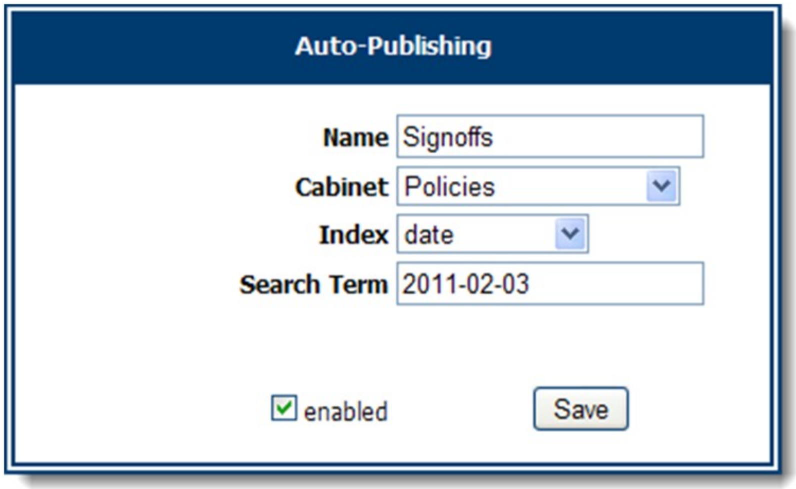
As an administrator, you can automatically publish all the documents within a department and cabinet that meet certain criteria. After defining the criteria for the auto-publishing, you give the appropriate external user access to the published documents.

For more information about auto-publishing, see page 104.

To auto-publish documents

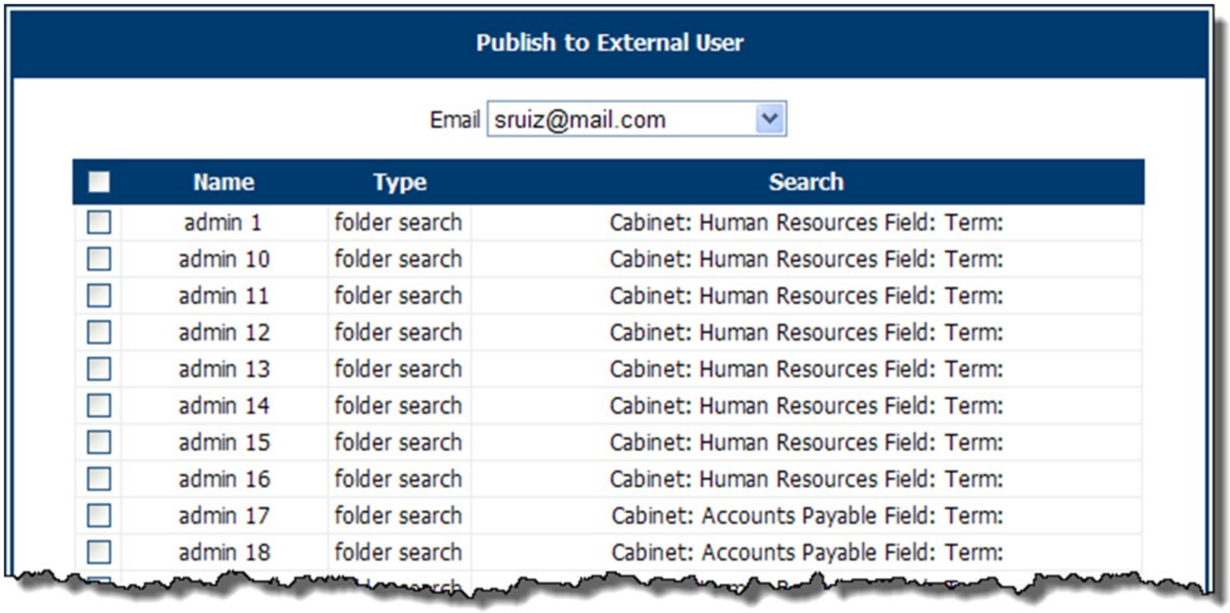
1. Click the **Publishing Functions** tab.
2. Click **Auto-Publishing**.

   The Auto-Publishing page opens.



3. Enter a name that identifies the documents being auto-published.
4. Select the cabinet where the documents to be published are located.
5. In the **Index** field, select the index field you want to search by to find the documents to be published. The cabinet you selected determines which index fields are available.
6. In the **Search Term** field, enter the appropriate index value.
7. Confirm that the **Enabled** check box is selected. This automatically adds any documents that meet your criteria to the publishing portal. You do not need to use the Publishing Wizard to publish the documents.
8. Click **Save**.
9. Do one of the following:
   - To publish the documents to a new external user, click **Add External User**.
   - To publish the documents to an existing external user, click **Edit External User**.

   The Publish to External User page opens.



Publish to External User

Email sruiz@mail.com

	Name	Type	Search
☐	admin 1	folder search	Cabinet: Human Resources Field: Term:
☐	admin 10	folder search	Cabinet: Human Resources Field: Term:
☐	admin 11	folder search	Cabinet: Human Resources Field: Term:
☐	admin 12	folder search	Cabinet: Human Resources Field: Term:
☐	admin 13	folder search	Cabinet: Human Resources Field: Term:
☐	admin 14	folder search	Cabinet: Human Resources Field: Term:
☐	admin 15	folder search	Cabinet: Human Resources Field: Term:
☐	admin 16	folder search	Cabinet: Human Resources Field: Term:
☐	admin 17	folder search	Cabinet: Accounts Payable Field: Term:
☐	admin 18	folder search	Cabinet: Accounts Payable Field: Term:

10. In the **Email** field, enter the external user's e-mail address (for a new user) or select the e-mail address (for an existing user).
11. Select the check box next to each publishing search you want to make accessible to the user. For more information about the different publishing types, see "Publish to External Users" on page 112.

Note: With auto-publishing, the external user is not notified via e-mail when a document has been added to the publishing portal. Instead, the user must regularly log in to the portal to view the most current published documents.

12. Select **Upload Files** if you want to give the external user permission to upload documents to the portal.

Note: Uploaded documents can be added to a designated cabinet (see page 115), or they can enter a selected workflow (116).

13. Click **Save**.

Publish to External Users

The Publish to External Users page lets you assign a manual publishing, auto-publishing, workflow, and/or upload to an external user. The page lists the following:

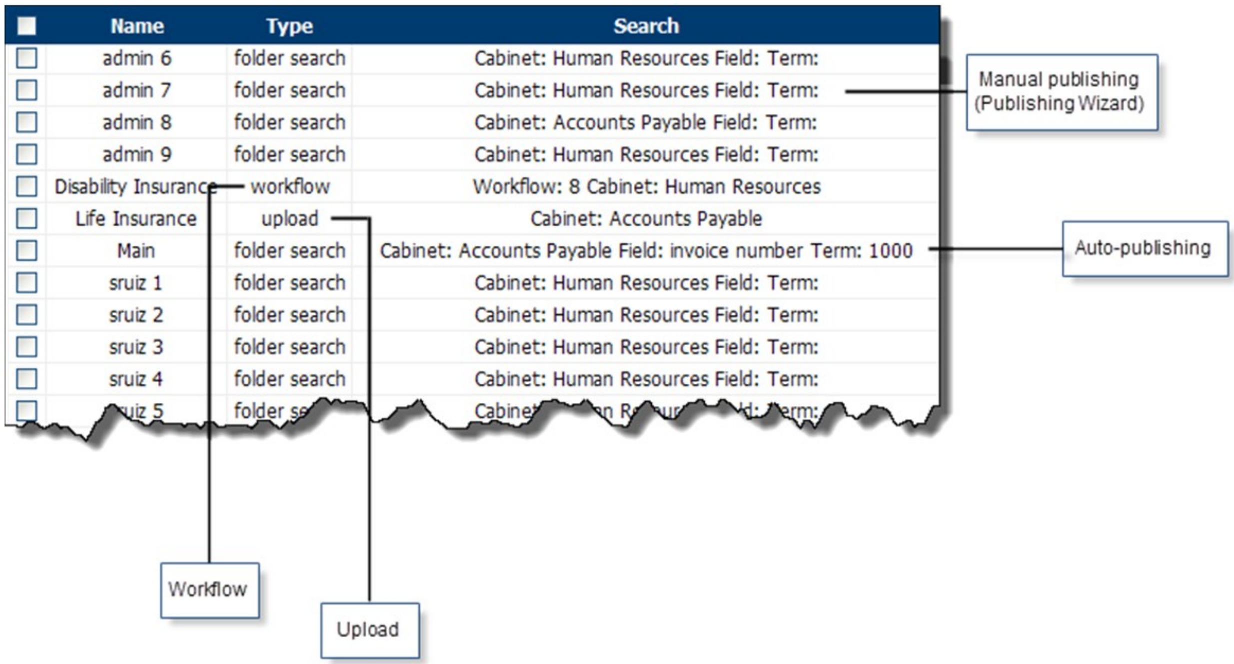
- Each auto-publishing that was defined using the Auto-Publishing page (see page 110).
- Each manual publishing that was performed using the Publishing Wizard (see page 101).
- Each workflow that can be assigned to documents published by external users (see page 116).

- Each upload that specifies the cabinet where documents can be uploaded by external users (see page 115).

You can select the check box next to each auto-publishing, manual publishing, workflow, and/or upload you want to make accessible to a selected external user.

To open the Publish to External Users page, click **Add External User** or **Edit External User** on the Publishing Functions tab. Information about each publishing action is displayed in the following columns:

Column	Description
Name	Displays one of the following: • The name of the manual publishing. • The name of the auto-publishing. • The name of the workflow assigned to documents that external users publish to the portal. • The name of the upload assigned to documents that external users publish to the portal.
Type	The type of publishing action: • **Folder Search** – A manual or automatic publishing. • **Workflow** – A workflow assigned to published documents. • **Upload** – A designated cabinet where published documents are stored.
Search	Details about the type of publishing: • A defined Field and Term (that is, and index field and index value) indicate an auto-publishing. • An undefined Field and Term indicate a manual publishing. • A workflow name indicates a workflow. • A cabinet name by itself indicates an upload.



Modifying Auto-Publishing

You can modify the search criteria for an auto-publishing. You can also disable the auto-publishing to prevent additional documents that meet its search criteria from being published to the web portal.

To modify an auto-publishing

1. Click the **Publishing Functions** tab.
2. Click **Manage Auto-Publishing**.
3. Select the auto-publishing you want to modify.
4. If necessary, select a new cabinet and index value for future searches.
5. If necessary, enter a new index value in the **Search Term** field.
6. To disable the auto-publishing, clear the **Enabled** check box.
7. Click **Save**.

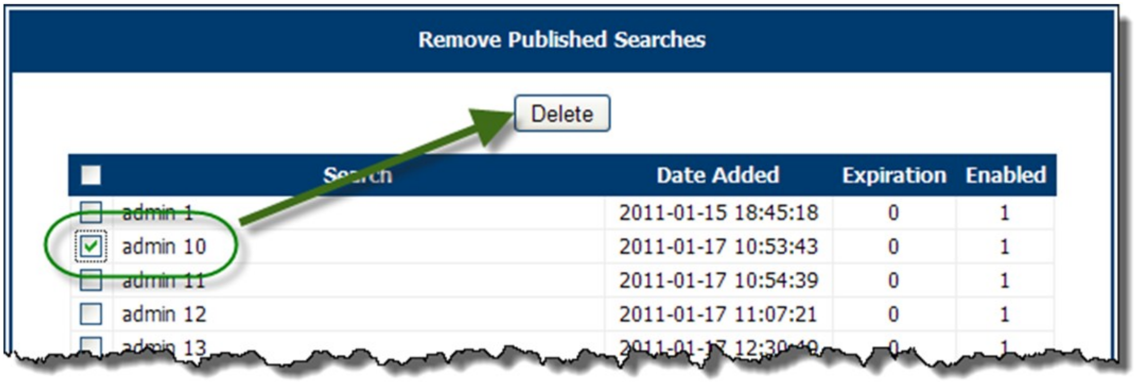
Removing an Auto-Publish Search

Auto-publishing does not have an expiration date. Documents continue to be published until the publishing criteria are no longer relevant (see page 110) or you delete the auto-publish search.

To delete an auto-publish search

1. Click the **Publishing Functions** tab.
2. Click **Remove Published Searches**.

   The Remove Published Searches page opens.



3. Select the check box next to each search you want to remove.
4. Click **Delete**.

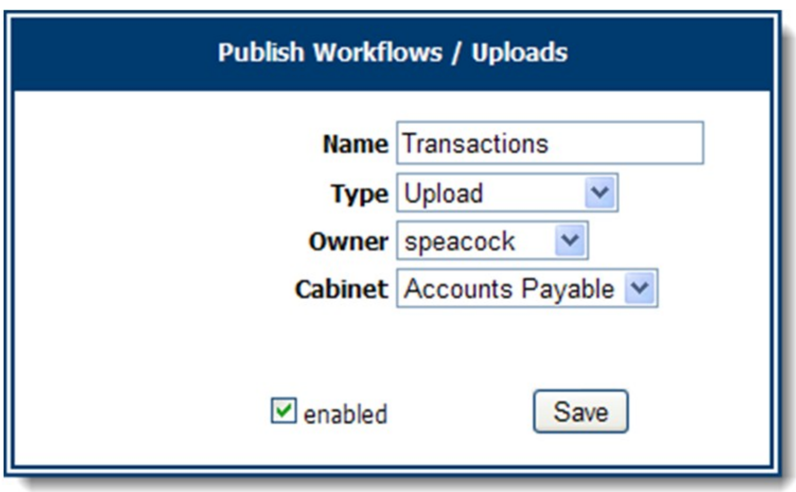
Designating an Upload Cabinet

When external users use the publishing portal to upload documents, they must select the Treeno cabinet where the documents should be stored. You designate the appropriate upload cabinets using the Publish Workflows/Uploads page. Each upload cabinet you define is displayed on the Publish to External Users page with a type of Upload (see page 112).

To designate an upload cabinet

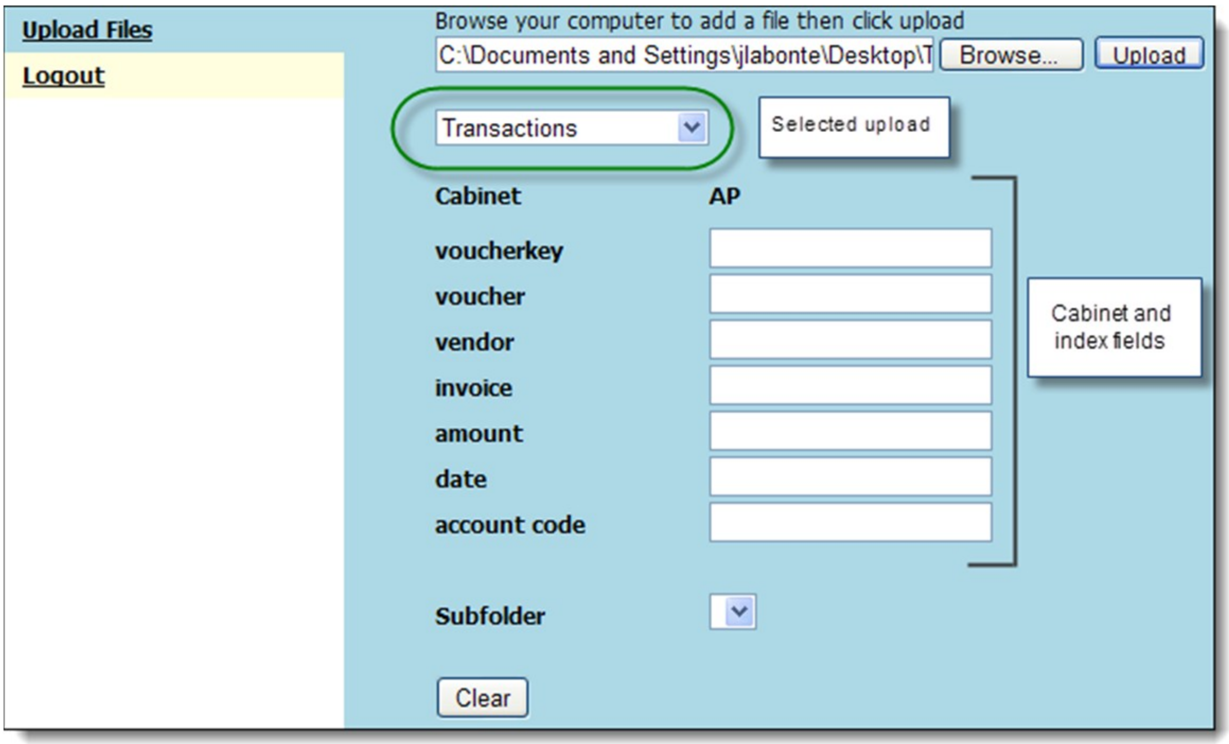
1. Click the **Publishing Functions** tab.
2. Click **Publish Workflow**.

   The Publish Workflows/Uploads page opens.



3. Enter a name for the upload (for example, Transactions). When external users upload a document to the portal, they can select this name from the drop-down list.

4. In the **Type** drop-down list, select **Upload**.
5. In the **Owner** drop-down list, select the Treeno user you want to associate with the upload. The user is not notified when documents are uploaded from the publishing portal.
6. Select the cabinet where the document will be published to. The cabinet's name and index fields will be displayed when the external user selects the upload name you specified in step 3. The external user can then enter index values for the document, as appropriate.



7. Confirm the **Enabled** check box is selected. This displays the upload name in the portal's drop-down list, making it available for external users to select.
8. Click **Save**.

Publishing to a Workflow

When an external user uploads a document to the publishing portal, the document can automatically enter a workflow in Treeno and be sent to the first node. The Treeno user assigned to that node will receive notification via e-mail and/or the addition of a workflow item on their Workflow Tasks list.

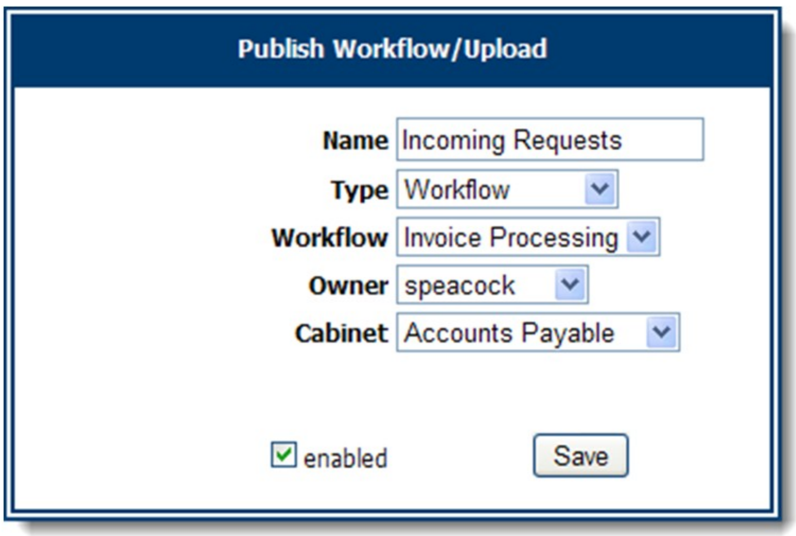
Using the Publish Workflows/Uploads page, you define the different publishing workflows that external users can select from in the portal. Each workflow is displayed on the Publish to External Users page (see page 112). Once you assign a publishing workflow to an external user, that user will see a **Start Workflow** link in the left-hand pane of the portal. The user can then click the link to select the appropriate workflow options for the documents being uploaded to Treeno.

Note: The sole purpose of a publishing workflow is to specify which workflow a document should enter when it is uploaded into the Treeno system. Unlike an internal Treeno workflow, it is not configured as a series of states and nodes for document routing. For more information about managing workflows within Treeno, see page 79.

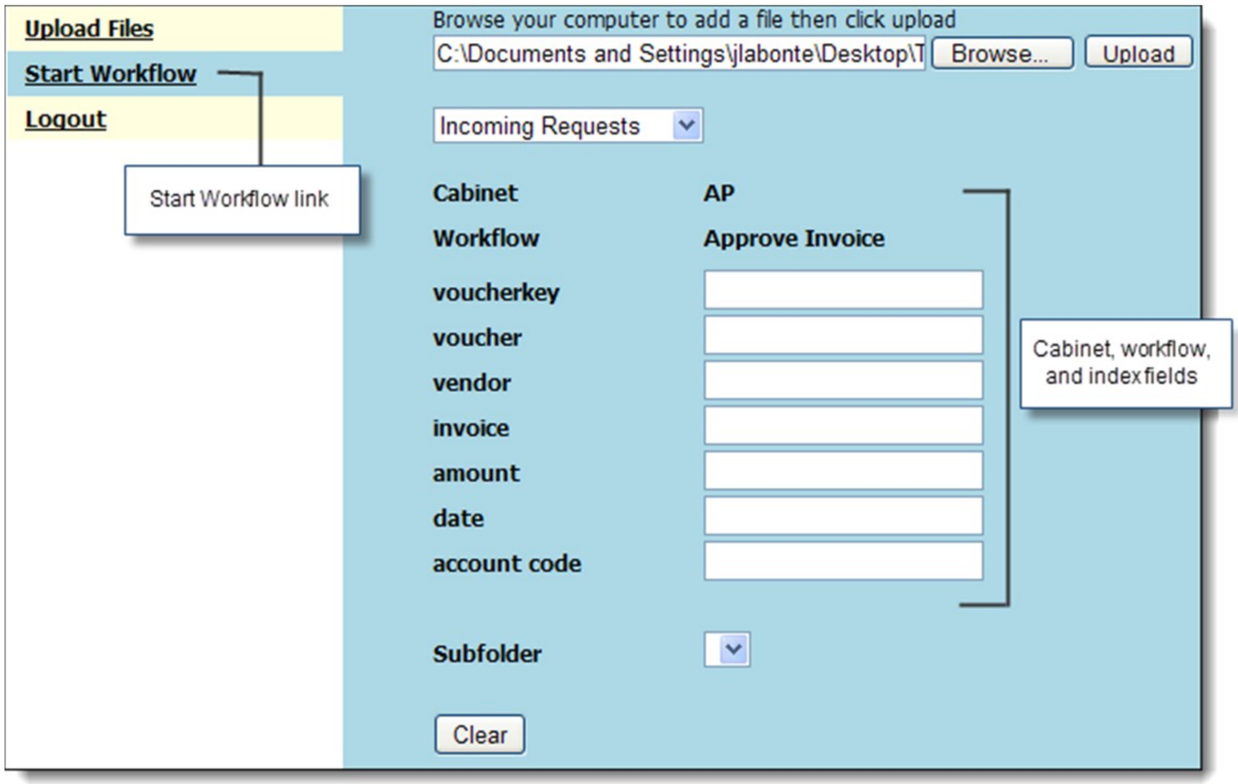
To publish to a workflow

1. Click the **Publishing Functions** tab.
2. Click **Publish Workflow**.

   The Publish Workflows/Upload page opens.



3. Enter a name for the publishing workflow (for example, Incoming Requests). When users upload a document to the portal, they can select this name from the drop-down list.
4. In the **Type** drop-down list, select **Workflow**.
5. Select the workflow you want to assign to the uploaded document.
6. In the **Owner** drop-down list, select the Treeno user you want to associate with the publishing workflow. This does not have to be the workflow owner. The user you select is not notified when documents enter the workflow from the publishing portal.
7. Select the cabinet where the document will be uploaded to enter the Treeno workflow. The cabinet's name and index fields will be displayed when the external user selects the name you specified in step 3. The external user can then enter index values for the document, as appropriate.



8. Confirm the **Enabled** check box is selected. This displays the publishing workflow name in the portal's drop-down list, making it available for external users to select.
9. Click **Save**.

Modifying Publishing Uploads and Workflows

You can modify the specifications of a publishing upload or workflow. You can also disable the upload/workflow to prevent it from being displayed as an option in the portal.

To modify an upload or workflow

1. Click the **Publishing Functions** tab.
2. Click **Manage Published Workflow**.

   The Publish Workflow/Upload page opens.
3. Select the upload or workflow you want to modify.
4. Select a new workflow, owner, and/or cabinet, as appropriate.
5. To prevent the upload/workflow from appearing in the portal, clear the **Enabled** check box.
6. Click **Save**.

Managing Document Types for Publishing

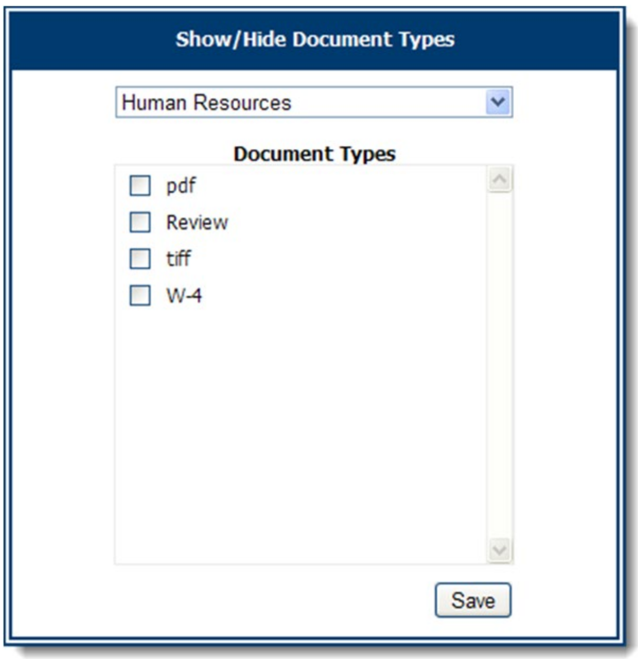
You can control which document types are available to publish. When you hide a document type, it cannot be manually or automatically published to the web portal.

By default, all document types are available.

To show or hide a document type for publishing

1. Click the **Publishing Functions** tab.
2. Click **Show/Hide Document Types**.

   The Show/Hide Document Types page opens.



3. Select the cabinet you want to work with.
4. Select the check box next to each document type you want to make available for publishing. Those document types that are not selected are now hidden from the cabinet view.
5. Click **Save**.

Note: For more information on document types, see page 38.

Using the Recycle Bins

The Treeno system includes two recycle bins—one for items that were deleted from a cabinet and another for items deleted from a user's inbox. You can restore or permanently delete items in a recycle bin.

Note: Department administrators can only access recycle bins within their own departments. System administrators can access any recycle bin in the system.

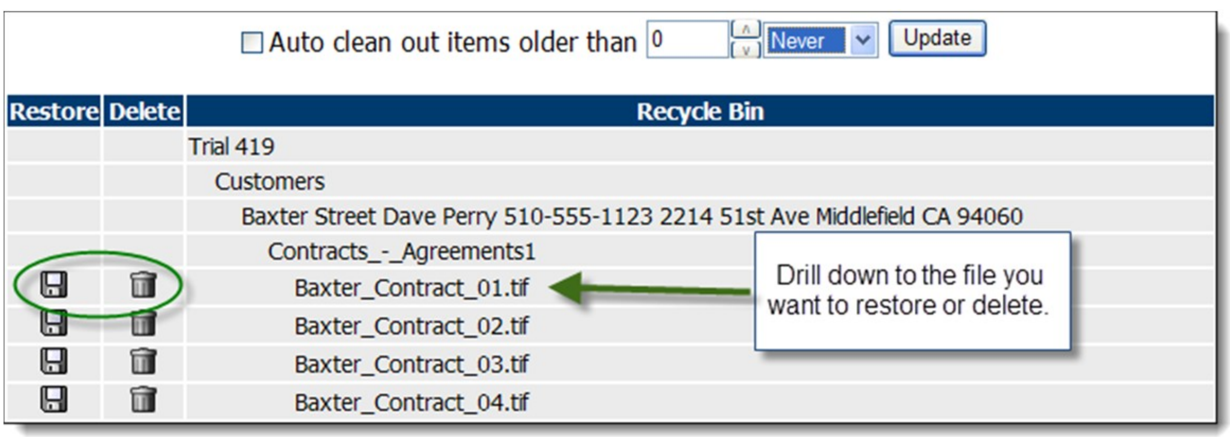
Cabinet Recycle Bin

When a user deletes a file from a cabinet, it is automatically sent to the cabinet's recycle bin. You can restore or permanently delete the items in this recycle bin. You can also automatically delete items that have exceeded a specified time limit.

To restore or permanently delete items in a cabinet recycle bin

1. Click the **Recycle Bin** tab.
2. Click **Cabinet Recycle Bin**.

   The Recycle Bin page opens and displays the cabinets contained in the current department. Items are stored in a tree structure.



3. Drill down to the file you want to restore or delete.
4. Do one of the following:
   - To restore the file to its original location, click .
   - To permanently delete the file, click .

5. To set up auto-deleting on a recurring schedule, select the **Auto Clean Out Items** check box and enter the time frame in days, weeks, or months. All items in the cabinet's recycle bin will be automatically deleted according to the schedule you specify. Click **Update** to set the schedule.

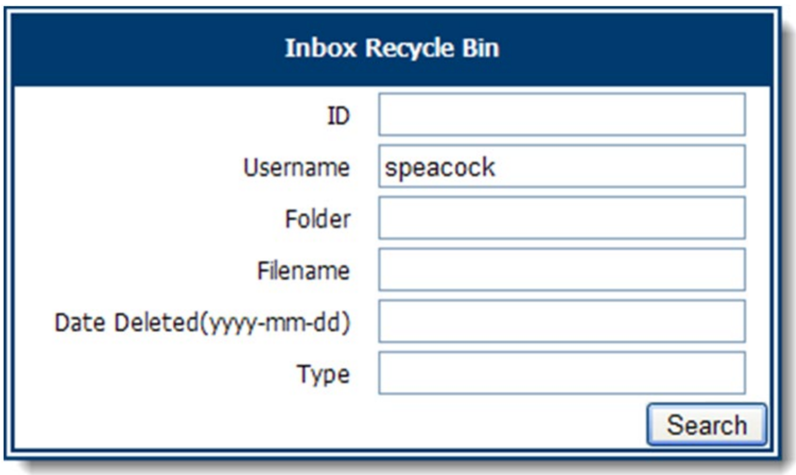
Inbox Recycle Bin

When a user deletes an item from their inbox, the item is automatically sent to the inbox recycle bin. You can restore or permanently delete the items in this recycle bin.

To restore or permanently delete items in an inbox recycle bin

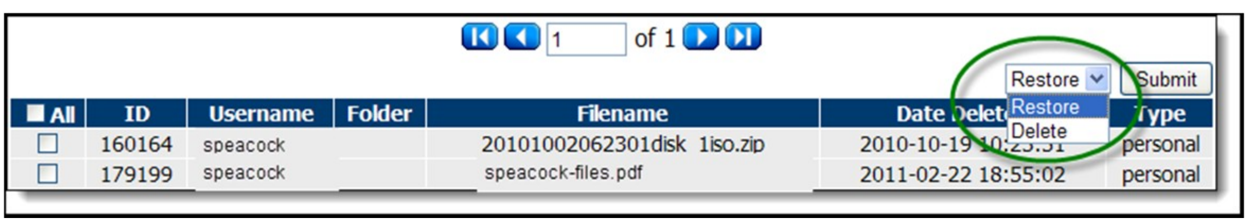
1. Click the **Recycle Bin** tab.
2. Click **Inbox Recycle Bin**.

   The Inbox Recycle Bin page opens.



3. Enter the search criteria for the item you want to delete or restore, and then click **Search**.

   The items that meet your search criteria are displayed.



4. Select the check box next to each item you want to restore or delete.

   To select all items in the recycle bin, select the **All** check box.

Note: If your multiple pages of items are returned, click the navigation arrows at the top of the search results to scroll through each page.

5. From the drop-down list, select **Restore** or **Delete**.

6. Click **Submit**.

Auditing

All system transactions in Treeno are audited, allowing you to monitor a document's progress and anticipate any bottlenecks or issues before they arise.

The audit table displays a history of transactions based on defined search criteria. Information is detailed in the following columns:

- **ID** – The system-generated ID assigned to each transaction record.
- **Username** – The name of the user who performed the transaction.
- **Date/Time** – The date and time the transaction was performed.
- **Info** – Metadata contained within the transaction record.
- **Action** – The type of transaction performed.

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id	username	datetime	info	action
1	admin	2010-10-12 15:03:54	logged into system, from 10.1.10.29	login
2	admin	2010-10-12 15:03:54	whiteLabel=Treeno Software	changed global settings
3	admin	2010-10-12 15:07:05	logged into system, from 10.1.10.29	login
4	admin	2010-10-12 15:08:23	logged into system, from 10.1.10.29	login
5	admin	2010-10-12 15:13:42	logged into system, from 10.1.10.29	login
6	admin	2010-10-12 15:14:01	user depadmin created	new user created
7	admin	2010-10-12 15:14:27	User depadmin Deleted from System	user deleted
8	admin	2010-10-12 15:16:42	user depadmin created	new user created
9	admin	2010-10-12 15:20:39	User depadmin Deleted from System	user deleted
10	admin	2010-10-12 15:20:55	user depadmin created	new user created
11	admin	2010-10-12 15:21:17	User depadmin Deleted from System	user deleted
12	admin	2010-10-12 15:21:30	user depadmin created	new user created
13	admin	2010-10-12 15:24:01	User depadmin Deleted from System	user deleted
14	admin	2010-10-12 15:24:14	user depadmin created	new user created
15	admin	2010-10-12 15:25:34	User depadmin Deleted from System	user deleted

Viewing the Audit Table

The audit table displays a history of transactions based on the search criteria that you enter. You can search for information by user, date and time, transaction description, and/or action type.

Note: Department administrators can view transactions for their departments only. System administrators can view the audit table for the entire system.

To view the Audit table

1. Click the **Audit** tab.
2. Click **Audit Table**.

   The Search Audit Table page opens.

3. Enter one or more search criteria for the audit:
   - **ID** – The system-generated ID assigned to the transaction.
   - **Username** – The name of the user who performed the transaction.
   - **Date/Time** – Click the **Calendar** icon to open the popup calendar and select a date for the transaction.
   - **Info** – Metadata that is contained within the transaction record. For example, you might enter an index value for a folder whose transactions you want to report on.
   - **Action** – Select the type of action performed.
4. Click **Search**.

   A list of transactions that meet your search criteria are displayed.
5. If the audit table consists of multiple pages, click the arrows at the top or bottom of the page to scroll through the pages, or enter the page number you want to view, and press ENTER.

Downloading the Audit Table

You can download the entire Audit table to a tab-delimited .csv file. This allows you to sort and manipulate the data within a spreadsheet application, such as Microsoft® Excel®.

To download the Audit table

1. Click the **Audit** tab.
2. Click **Download Audit Table**.
3. In the File Download dialog box, do one of the following:
    - Click **Open** to view the table in Excel.
    - Click **Save** to save the .csv file to a specified location.

Archiving Selected Audit Records

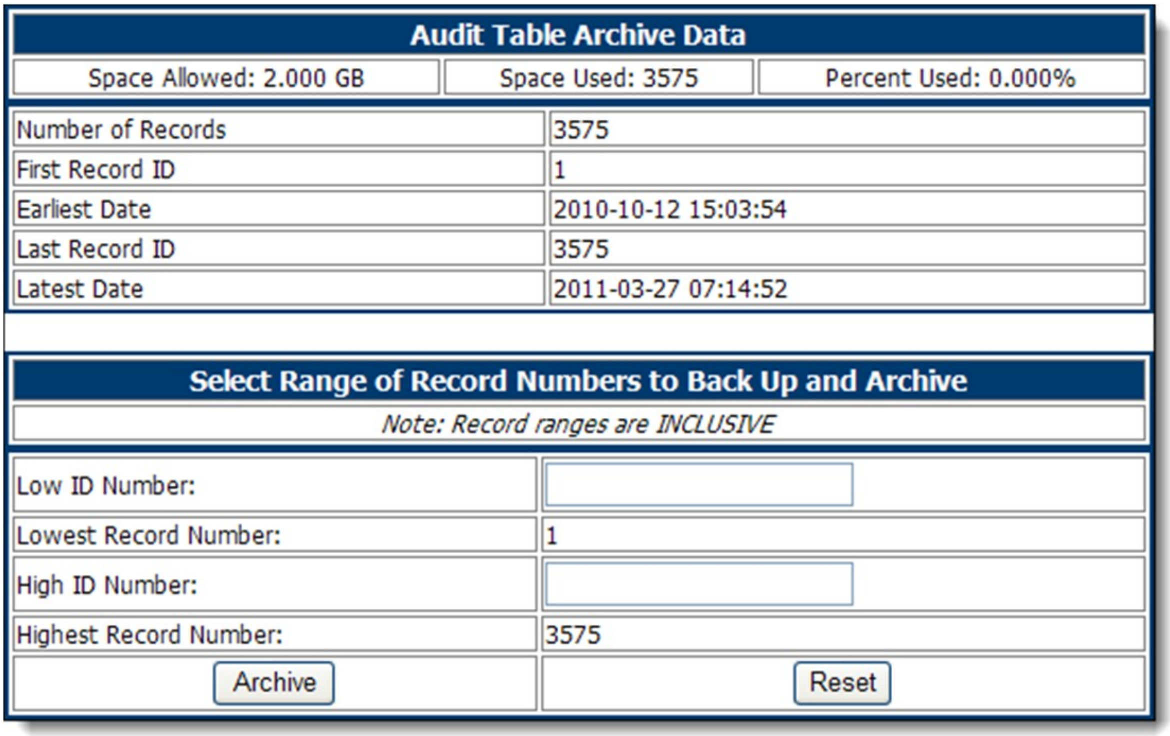
To minimize the size of your database, you can archive a selected range of audit records. The specified records are extracted from your active database and saved in a compressed .csv file in a designated location. You can download this archive file at any time.

Note: The range of records you specify is *inclusive*.

To archive audit transactions

1. Click the **Audit** tab.
2. Click **Archive Audit Table**.

    The Archive Audit Table page opens. The Audit Table Administration area of the page displays the number of audit records currently in your active database, the range of ID numbers, and the date of the earliest and most current records.



3. In the **Select Range of Records** area, enter the range of records, from the lowest ID number to the highest ID number, that you want to remove from the active database and archive.
4. Click **Archive**.

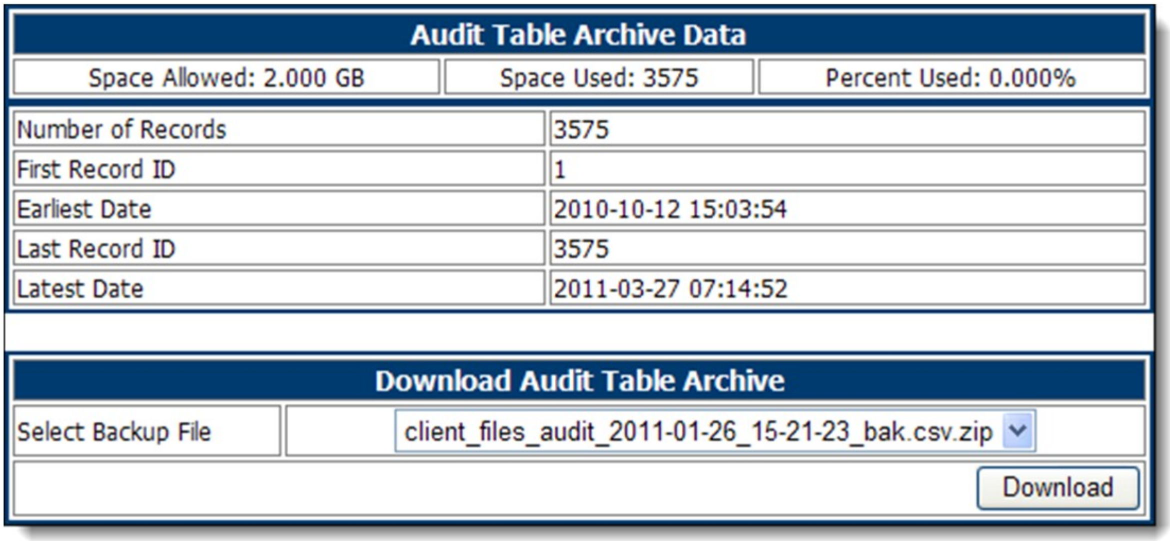
Downloading an Audit Table Archive

After you have archived a range of audit records, you can download the compressed .csv file that was created.

To download an audit table archive

1. Click the **Audit** tab.
2. Click **Download an Archive**.

   The Download an Archive page opens.



3. Select the appropriate archive file and click **Download**.
4. Do one of the following:
    - Click **Open** to access the file in its .zip folder.
    - Click **Save** to save the .zip file to a designated location.

Backing Up the Audit Table

You can create a backup copy of your entire audit table. The compressed .csv file will contain all the audit records in your active database.

To back up the audit table

1. Click the **Audit** tab.
2. Click **Backup Whole Table**.

   The name of the backup file is displayed.

Treeno Reports

Treeno provides several reports to help you monitor your users, documents, and workflows. Most reports are accessible to system and department administrators; however, the following reports are restricted to system administrators only:

- User Cabinet Rights
- User Access to Cabinets and Departments
- Group Membership per User, per Department
- Compliance

All reports are accessed from the Reports tab.

Personal Inbox Report

The Personal Inbox report shows the number of items in each user's inbox, the oldest item in the inbox, and the date the oldest item was added to the inbox.

Use this report to monitor the amount of time items remain in a user's inbox and to identify if a document has been processed by the user.

Advanced Inbox Report

The Advanced Inbox report exports a user's inbox contents to a Microsoft Excel spreadsheet that you can view immediately or save to a designated location. For each user, the report identifies the oldest item in the inbox and the date the item was added to the inbox.

License Usage

The License Usage report indicates the number of licenses that are in use, by department, for the selected date.

Average Time to Process

Use the Average Time to Process report to determine how much time was required to process documents at a selected workflow. This can be helpful when you need to identify and resolve bottlenecks in the processing of a document.

You can sort the report results by the total workflow time or start date.

In addition to calculating the total time a document spent in the workflow, the report displays each of the nodes the document passed through, the name of the user assigned to the node, the date and time the document entered the node, and the date and time the document left the node.

The Average Time to Process report is exported in .xls format. You can choose to open the report in Microsoft Excel or save the report to a designated location.

Total Number of Workflows

The Total Number of Workflows report indicates the number of documents that have been routed through each workflow for a selected date range.

The report is exported in .xls format. You can choose to open the report in Microsoft Excel or save the report to a designated location.

Individual Workflow

Use the Individual Workflow report to identify the number of workflow items that a specific user has processed during a selected time frame.

For each node the user is assigned to, the report displays the action that was performed, the date and time of the action, and the location of the document.

The Individual Workflow report is exported in .xls format. You can choose to open the report in Microsoft Excel or save the report to a designated location.

Work in Progress

Use the Work in Progress report to determine which documents are currently being routed and to help identify any bottlenecks in your workflow processes.

The report displays documents currently being processed in a selected workflow for a particular date. The report indicates the amount of time the document has been in the workflow, the date and time the document entered the workflow, and the amount of time the document has been sitting at the current node.

You can sort the report results by total workflow time or start date.

The Work in Progress report is exported in .xls format. You can choose to open the report in Microsoft Excel or save the report to a designated location.

Folders without Workflow

Use the Folders without Workflow report to determine which folders in a cabinet have not been assigned a workflow. The report is automatically sent to your inbox as an Excel (.xls) spreadsheet.

Versioning

The Versioning report provides an audit trail of all documents that are currently checked out of the Treeno system. The following information is displayed: the name of the document, the name of the user who checked out the document, the checkout date, and the location of the document in Treeno.

Batch Routed Audit

The Batch Routed Audit report shows all documents that have been filed away in Treeno for the selected date range. For each document, the report displays the name of the user who processed it, the date it was processed, and the location where it is stored.

The report is exported in .csv format. You can choose to open it in Microsoft Excel or save it to a designated location.

User Cabinet Rights

The User Cabinet Rights report displays each user's access rights to the cabinets in your Treeno system. If a cabinet is not displayed, the user does not any rights to it.

- **rw** = Read/Write access
- **r** = Read Only access

This report is available only to system administrators.

User Access to Cabinets and Departments

This report displays each user's access rights by department and cabinet.

- **rw** = Read/Write access
- **r** = Read Only access

The report is exported in .csv format. You can choose to open it in Microsoft Excel or save it to a designated location.

This report is available only to system administrators.

User Last Login

Use the User Last Login report to identify when each user last logged in to the Treeno system.

The report is exported in .csv format. You can choose to open it in Microsoft Excel or save it to a designated location.

This report is available only to system administrators.

Group Memberships per User, per Department

For each user in your Treeno system, this report displays the groups and departments the user has been assigned to.

The Group Membership report is exported in .csv format. You can choose to open it in Microsoft Excel or save it to a designated location.

This report is available only to system administrators.

Compliance

Use the Compliance report to identify if a cabinet has the required document types in it. For each cabinet you report on, you can identify which documents types are missing or which ones have been completed.

This report is exported in .csv format. You can choose to open it in Microsoft Excel or save it to a designated location.

The Compliance report is available only to system administrators.

Burning Cabinet Data to CD

Treeno enables you to burn cabinet data to CD to back up your system. The CD backup allows users to access folder data when they are without a network connection. Because folder metadata is included in the backup, users can perform cabinet-level searches. They can also access any images stored in the folder from the CD backup.

A DVD can also be created to archive records from the system. The records stored in Treeno will not be removed.

Archived records are saved in a .iso file and sent to your inbox. Creating a CD or DVD from the .iso file may take several hours, depending on the amount of data requested.

The .iso file name is prefixed with a 4-digit year, 2-digit month, 2-digit day, and 24-hour time stamp.

Example: 20110101080023.iso

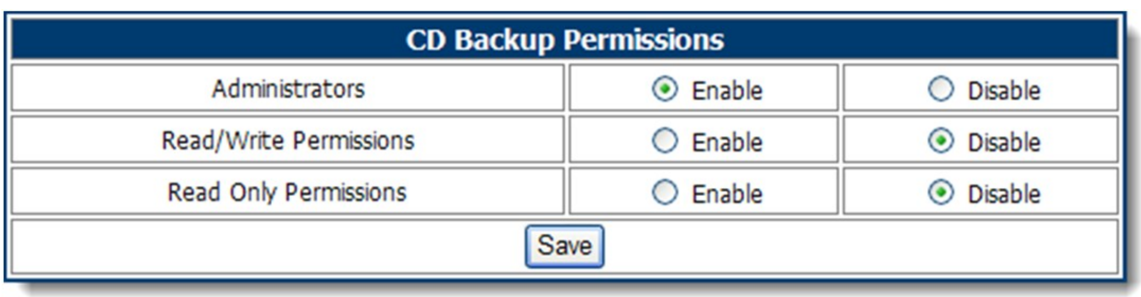
Assigning CD Backup Permissions

You can specify which users have permission to create CD backups.

To assign CD backup permissions

1. Click the **Backup** tab.
2. Click **System Backup Permissions**.

   The CD Backup Permissions page opens.



3. Select **Enable** or **Disable** for each of the following users:
   - **Administrators** – Department or system administrators
   - **Read/Write Permissions** – Users who have read/write access to the selected cabinets.
   - **Read Only Permissions** – Users who have read only access to the selected cabinets.
4. Click **Save**.

Selecting the Backup Media

You can burn archived data to CD or DVD.

To select backup media

1. Click the **Backup** tab.
2. Click **Backup Media Settings**.
3. Select your preferred media type: **CDR** (maximum 700 MB) or **DVD+RW** (maximum 4.7 GB).
4. Click **Change Media**.

Burning Cabinet Data to CD

You can select the cabinets whose data (folders, folder metadata, folder images) you want to burn to CD.

To burn cabinet data to CD

1. Click the **Backup** tab.
2. Click **System Backup**.

   The Backup a Cabinet page opens.
3. Select the check box next to each applicable cabinet.
4. Click **Backup**.

The archived records are saved in a .iso file and sent to your inbox. Creating a CD or DVD from the .iso file may take several hours, depending on the amount of data requested.

The .iso file name is prefixed with a 4-digit year, 2-digit month, 2-digit day, and 24-hour time stamp.

> **Example**: 20110101080023.iso

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