

TREENO FILE MONITOR

About Treeno

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



INTRODUCTION

Treeno File Monitor is a .NET application that works with your scanner to turn your paper documents into digital files and route them to the Treeno Document Server. It can be installed as a standalone desktop application or as a service, and a single File Monitor can accept scanned documents from an unlimited number of multi-function devices.

With its built-in barcode recognition, the File Monitor can automatically route your scanned documents to an inbox, folder, or workflow within Treeno. Documents must be scanned in TIFF or PDF format to use the File Monitor's barcode recognition functionality.

Along with barcodes, the Treeno File Monitor implements locally shared "hot folders" to upload your electronic files to the Treeno Document Server. When users add electronic files into these watched folders, the File Monitor automatically routes them to a designated inbox, folder, or workflow in Treeno. All data and files are encrypted during the transfer to the Treeno Document Server.

About The Guide

This guide is intended for individuals who are installing and configuring the Treeno File Monitor. It provides information about the following topics:

Monitored Folders

Installing Treeno File Monitor

Configuring Treeno File Monitor

Creating Barcodes for Monitored Folders

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MONITORED FOLDERS

Monitored Folder Types

When you want Treeno File Monitor to upload a file to the Treeno Document Server, you place the file in a monitored—or watched—folder. Only files that are located in monitored folders are processed by the File Monitor.

Scan Folder

The Scan folder is created when you configure the File Monitor. This is the primary folder where scanned documents are sent and then uploaded to Treeno. The default location of this folder is C:\Treeno\Scan, but you can specify a different location in the File Monitor Wizard.

Only scanned documents can be placed in the Scan folder. You must configure your scanner to send files directly to the Scan folder, and the files must be saved in TIFF or PDF format. The Scan folder does not support file types other than TIFF or PDF.

In order to be routed to the correct location in Treeno, each file that is sent to the Scan folder must be associated with a Treeno barcode. This barcode must be printed before you begin scanning documents and can target a specific folder, inbox, or workflow in Treeno. During the scanning process, you scan the printed barcode immediately before the batch of documents you want to send to the designated location in Treeno. From the Scan folder, the File Monitor reads the barcode and routes all associated PDF or TIFF files accordingly.

The File Monitor automatically splits multi-page TIFF or PDF files into individual files before uploading them to Treeno. By default, PDF files are converted to TIFF format before they are split and uploaded. You can override this default and retain the PDF format by selecting the Upload as PDF Files in the File Monitor Wizard.

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Inbox Folder

An Inbox folder is created for each Treeno user when you select the Setup Inbox Monitors check box on the General tab of the File Monitor Wizard. These folders are located in the parent Recovery folder (C:\Treeno\Recovery\Inbox\). When a file is placed in this folder, the File Monitor automatically routes it to the corresponding user inbox in Treeno.

You can scan documents directly to an Inbox folder. Scanned files must be in PDF or TIFF format. You can also drag and drop a file of any type into this folder (for example, .doc, .xls, or .jpg).

Because the Inbox folder is automatically linked to the user's inbox in Treeno, a printed barcode is not required for scanned documents. When the Enable Split on Auto-Monitored Inboxes option is selected in the File Monitor Wizard, the File Monitor splits multi-page TIFF or PDF files into individual files before uploading them to Treeno. PDF files are converted to TIFF format before they are split and uploaded.

Target Folder

You can create additional monitored—or target—folders anywhere on the computer where the File Monitor is installed. Each target folder is associated with a specific Treeno folder, inbox, or workflow using a barcode that you generate from Treeno. Scanned files must be in TIFF or PDF format to be uploaded to Treeno. Electronic files that you drag into the folder can be in any format.

Before you set up a target folder using the File Monitor Wizard, you need to generate a barcode to the folder, inbox, or workflow in Treeno. You then copy and paste that barcode into the wizard's Extra Barcode Monitors window. Because a barcode is already assigned to the target folder, you do not need to print a barcode sheet for your scanned documents. The File Monitor will automatically upload the files that are placed in the folder to the designated location in Treeno.

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Target Folder

When the Split check box is selected for a target folder, the File Monitor splits multi-page TIFF or PDF files into individual files before uploading them to Treeno. PDF files are converted to TIFF format before they are split and uploaded.

Summary of Monitored Folders

The following table summarizes the requirements and features of the different types of monitored folders:

	Scan Folder	Inbox Folder	Target Folder
Scanned documents (PDF and TIFF only)	Yes	Yes	Yes
Other file types (drag and drop)	No	Yes	Yes
Printed barcode sheet required	Yes	No	No
Multi-page document splitting	Yes	Yes	Yes

System Requirements

The following are the minimum system requirements for Treeno File Monitor.

- Microsoft® Windows® 7 or higher for **Desktop Application**, 2008 Microsoft Server for **Network Service**
- Treeno File Monitor will run on any Desktop system that is MS Windows 7 or greater.
- Pentium 4, 2 Ghz or better processor
- 2 GB RAM or better
- 10 GB **Minimum** of available hard disk space. *This depends on the volume of scanned files.*

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INSTALLING FILE MONITOR

To Install File Monitor, Choose to Download as a Desktop Application or Service.

When installing Treeno File Monitor as a Desktop Application, make sure your scanning device is networked to the computer where the File Monitor will be located.

Select File Monitor as a Service if you are running on a dedicated server. Make sure your scanning device is networked to the computer where the File Monitor will be located, most likely a Windows Server.

1. Go to Treeno Plug-Ins page url: <http://saas.treenosoftware.com/treeno4>. Select File Monitor (see correct versions below).
2. Click one of the following File Monitor:
 - Installing as an Desktop Application:**
 - For a 32-bit system: File Monitor (x86).zip
 - For a 64-bit system: File Monitor (x64).zip
 - Installing as a Service**
 - For a 32-bit system: File Monitor Service (x86).zip
 - For a 64-bit system: File Monitor Service (x64).zip
3. **Download** the compressed .zip file: In the file download dialog box, click Save to save the installation files and then browse to the appropriate folder. Check downloads folder to locate.
4. **Unzip** the File Monitor folder. Double-click setup.exe.
5. If an Open File – Security Warning dialog box opens, click **More Info**, and **Run Anyway**.

CAUTION!

If you have previous versions of File Monitor installed or suspect that it has been previously installed, Go to Control Panel > Programs and Features > Uninstall.

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INSTALLING FILE MONITOR

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6. In the Welcome window, click Next.



7. In the Select Installation Folder window, do the following:
 - Click Browse if you want to install the File Monitor to a different location than the default folder that is displayed. Select Everyone, and then click Next.

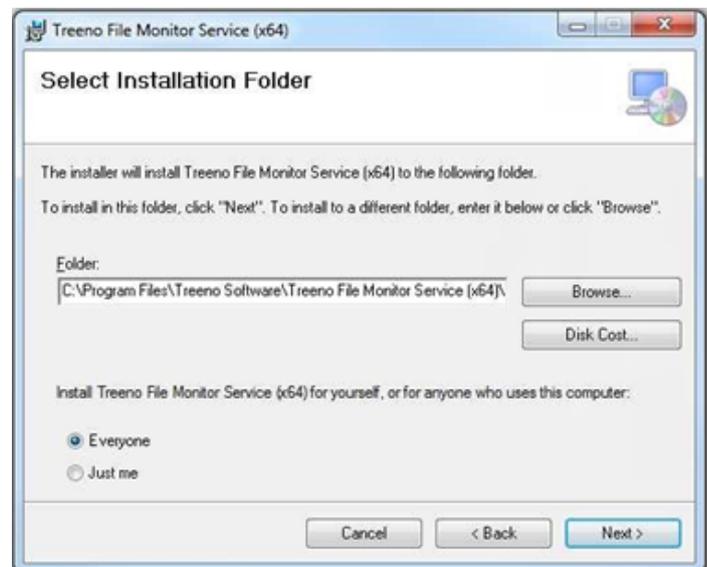
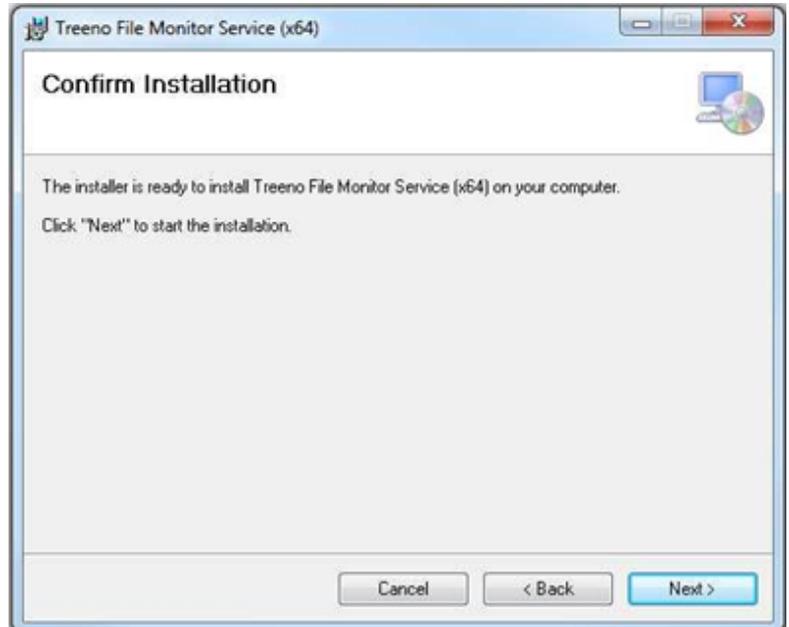


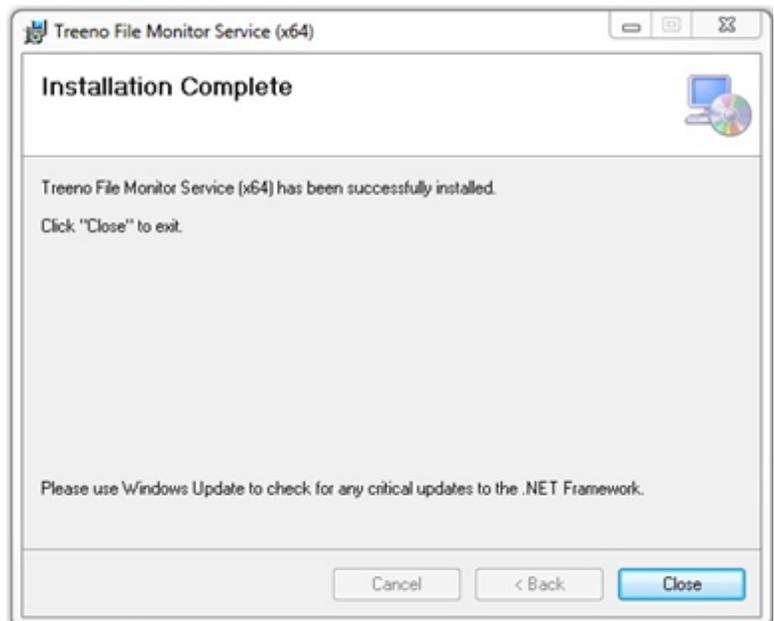
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8. In the Confirm Installation window, click Next to start the installation.



9. When the installation is complete, click Close.



10. You are now ready to configure the File Monitor settings.

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NOTE: The two most common issues people run into with FMS install are failing to extract the contents of the compressed file prior to running the setup file and not having the correct information when completing the configuration.

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CONFIGURING TREENO FILE MONITOR

File Monitor Wizard

After you install Treeno File Monitor, use the File Monitor Wizard to set up your barcode recognition, monitored and recovery folders, and the output format of your uploaded files.

All files that you want uploaded to Treeno must be placed in a monitored folder. When you install the File Monitor, a Scan folder is created. This is your primary monitored folder. You can scan directly to this folder, and File Monitor will route your files to a designated location in Treeno. You can also place files in an Inbox folder that is created for each Treeno user or in additional monitored folders that you designate as target folders.

For more information about the different types of monitored folders, see page 4. Regardless of whether Treeno File Monitor is installed as an application or a service, your monitored folders must be located on the computer where the File Monitor is installed. Shared network folders are not supported. You can, however, share local folders as needed.

Once you save your initial configuration in the wizard, a Recovery folder is also created (defaults as C:\Treeno\Recovery).

This is where files that are corrupt or that have unrecognizable barcodes are sent. The Recovery folder also contains the following sub-folders:

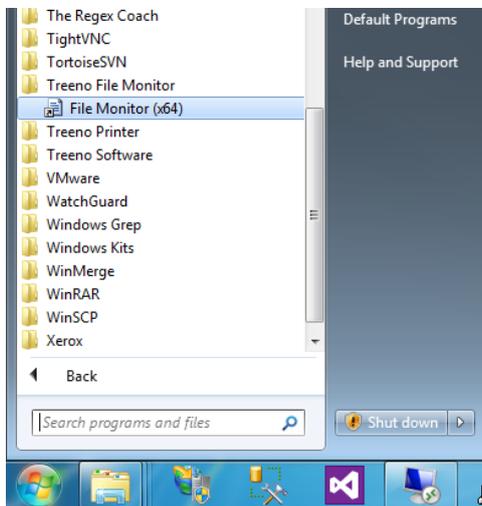
- **Archive** Contains a copy of every file that has been processed by Treeno File Monitor. The Archive folder is automatically cleared each time the File Monitor is restarted; however, you can manually delete the files on an as-needed basis.
- **Inboxes** If you selected the Setup Inbox Monitors check box on the General tab of the File Monitor Wizard, an Inbox folder is created for each user in the specified department. Just as you add files to the monitored folder, you can add files to a user's Inbox folder. File Monitor will then upload these files directly to the user's Treeno inbox.
- **Process** Serves as a temporary location for files as they are being processed by Treeno File Monitor. If all files are uploaded successfully to Treeno, the Process folder remains empty. If a file remains in the Process folder, an error has occurred during the upload, and the file should be moved back to the Scan folder and reprocessed.

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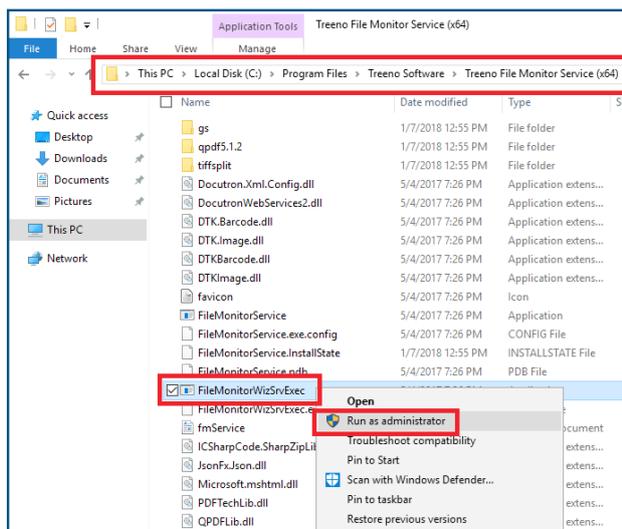
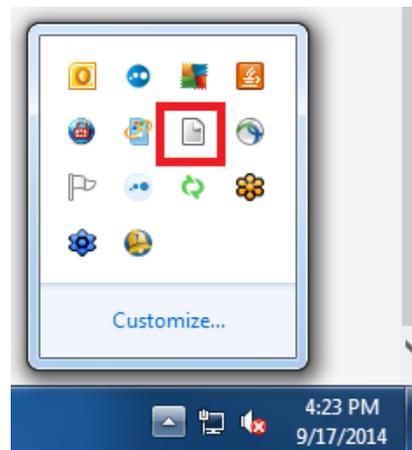
CONFIGURATION STEPS USING FILE MONITOR WIZARD

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1. To begin configuration after installing File Monitor, go to the Start Menu, All Programs, and click on File Monitor.



- If you get the Windows User Account Control window, select Yes. You will now see the File Monitor Icon in your system tray (below). Right Click the icon and select "Setup".

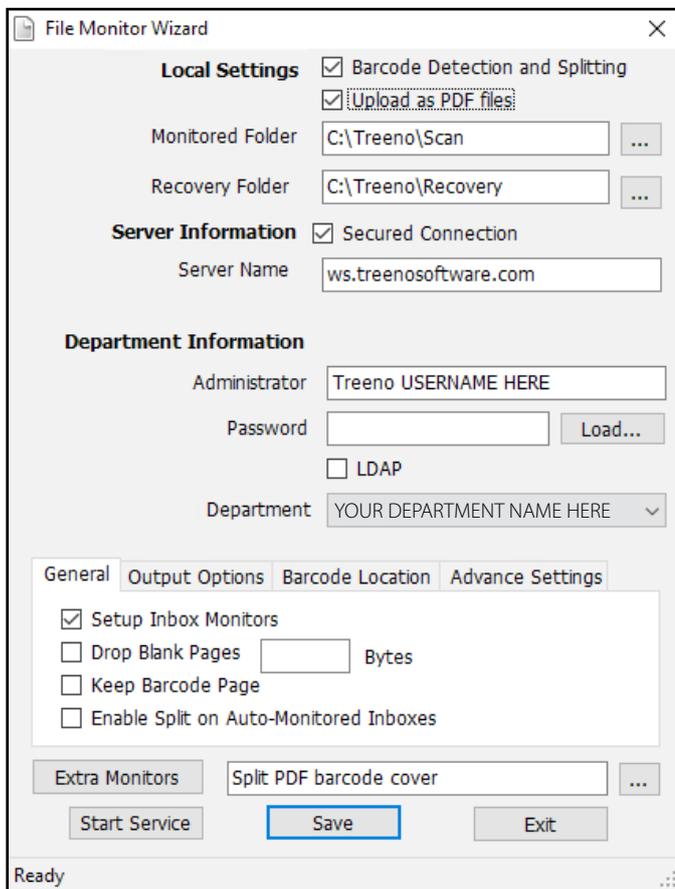


- Alternatively, you can configure the File Monitor settings by clicking Start > Treeno File Monitor, and select the File Monitor Wizard.
- Right click and Run as Administrator.

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CONFIGURATION STEPS USING FILE MONITOR WIZARD

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2. Provide the following information in the main area of the wizard:

- Upload as PDF Files** By default, the File Monitor converts files in the Scan folder as single page TIFFs. However, if you do not want to convert the format of your PDF files, you can override this setting by selecting the Upload as PDF Files check box. Because splitting applies only to multiple-page TIFF files, multiple-page PDF files are not split into individual PDF files.
- Monitored Folder** – The default monitored folder is C:\Treeno\Scan. This folder is created automatically when you save your File Monitor configuration. For more information about the Scan folder, **see page 4**. You can click the Browse button to select a different monitored folder; *however, this folder must be located on the local computer where the File Monitor is installed. Shared network folders are not supported. If necessary, the local folder can be shared.*
- Recovery Folder** – When the File Monitor encounters a file that is corrupt or that contains an unrecognizable barcode, that file is sent to the Recovery folder. The default location of this folder is C:\Treeno\Recovery. You can select a different folder by clicking the Browse button. The unprocessed files are sent to the Treeno inbox of the user displayed in the Department Administrator field. This inbox should be checked regularly to ensure that all files are being processed successfully.

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The Recovery folder also contains three sub-folders: Archive, Inboxes, and Process. See page 10 for additional information on these folders.

- **Upload Delay** – Indicates how long (in seconds) the File Monitor should wait to upload a file that is placed in the monitored folder by a scanning device. This prevents the File Monitor from uploading the file before the scanning device has finished creating it.
- **Process Interval** – Indicates how often (in seconds) the File Monitor should check the monitored folder for new files.
- **Secured Connection** – Select to indicate that you use an encrypted connection to your Treeno server (https://).
- **Server Name** – Enter the IP address or DNS name of your Treeno server.
- **Administrator** – Enter the user name of the designated Treeno user name who will be responsible for handling any errors that occur during the uploading process. Because unprocessed files are sent to this individual's Treeno inbox, it should be checked on a regularly basis.
- **Password** – Enter the password of the designated Treeno user's password to log in to Treeno.
- **Load** – Click to select the department where the designated Treeno user's inbox is located.
- **LDAP** – Select this check box if the designated Treeno user needs a LDAP connection to log in to the Treeno server.

14. On the General tab, configure your Inbox folders and scanning options:

- **Set Up Inbox Monitors** – Select this check box if you want to create an Inbox

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under the Recovery folder that is created when you finish configuring the File Monitor. When you add files to a user's Inbox folder, the File Monitor uploads them directly to the user's Treeno inbox. See page 5 for additional information about Inbox folders.

- **Drop Blank Pages** – Select this option to prevent the File Monitor from uploading blank pages in a scanned document. Specify the minimum file size to upload. By default, the File Monitor will ignore all files 4K or smaller.
- **Keep Barcode Page** – Select to upload the Treeno barcode sheet that is scanned with your paper documents.
- **Enable Split on Auto-Monitored Inboxes** – Select this option to split your scanned multiplepage TIFF or PDF files into individual files before they are uploaded to a user's Treeno inbox. Because splitting only applies to TIFFs, PDFs files are converted to TIFF format before they are split and uploaded. (The **Set Up Inbox Monitors** check box must be selected to enable splitting.) Clear the **Enable Split** option if any of the following is true:

You do NOT want to split your multiple-page documents into individual files.

You WANT to retain the PDF format of your scanned files.

You WANT the option of dragging files of other formats (.doc, .xls, .jpg, etc.) to an Inbox folder.

- **Extra Monitors** – Click to open the Extra Barcode Monitors window where you can create additional Target Folders for Treeno File Monitor. For information on printing barcodes and creating target folders, see page 6 of this Guide.

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15. Click the Output Options tab to configure color and resolution options for your scanned PDF files. [See Important Notes](#)

- **Under Device**, select **Black/White** if your scanning device processes documents as both color and black and white. Treeno File Monitor will upload the scanned PDFs in black and white format. Select **Color** to retain the color format of scanned documents when they are uploaded.
- **Under Resolution**, enter the horizontal and vertical dpi as which you want the File Monitor to process and upload PDFs. These dpi values may be different than the scanning resolution.

16. Click the Barcode Location tab to configure the location and orientation of your Treeno-generated barcodes.

- **Under Location**, check each position on the printed sheet where the File Monitor should look for a barcode.
- **Under Orientation**, check each direction the File Monitor should read the printed barcodes.

17. Click Save. Treeno File Monitor is now ready to begin processing and uploading files that are placed in your monitored folders.

IMPORTANT NOTES

The File Monitor automatically processes TIFF files using the resolution at which they are scanned.

Increasing the resolution or color setting results in a larger file size, especially with color PDFs.

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