INSTALLATION AND CONFIGURATION GUIDE

TREENOCONNECT & IMPORTER

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 measureable return on investment (ROI) through the use of our secure, reliable, and easy-to-use web-based EDM software solution.

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SOFTWARE

TreenoConnect and Importer

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FULL TREENOCONNECT OR IMPORTER?

TreenoConnect is available in two versions

TreenoConnect and Importer

Full TreenoConnect
The full version integrates with a third-party line-of-business application and allows Treeno to identify the window that is currently open in the application (the window that you most recently clicked in). When the full version is installed, the TreenoConnect displays a Search and an Index button.

When you click the Search button, the record or transaction that is displayed in the application's open window is located and displayed in Treeno. When you click the Index button, Treeno indexes the record you are working with using information pulled from the line-of-business application. (A search is automatically performed when you click Index.) Updates to the record in the line-of-business application are reflected in the index values for the associated document in Treeno.

Importer
The Importer version is not integrated with a line-of-business application. Instead, you drag files to the Integrator window.

You can then search to identify if a matching record already exists in Treeno. If it does, the file is uploaded to that folder and assigned the folder's index values. If a matching record does not exist, you can create a new folder, specify its index values, and then add the file to that location.

TreenoConnect and Importer

INTRODUCTION

TreenoConnect is a small .NET application that integrates with any line-of-business application (CRM, ERP, accounting system, etc.). Acting as a gateway to the Treeno repository, the TreenoConnect allows Treeno to identify the record or transaction that is currently open in the line-of-business application and do one of the following:

- Index unprocessed files that have been scanned into the user's Treeno inbox using information pulled from the current record or transaction in the line-of-business application.

- Create an empty folder in Treeno and populate its index fields using information from the current record or transaction in the line-of-business application. Related documents can then be scanned directly into this folder.

The TreenoConnect also allows you to import local and network files—including e-mails—into Treeno by dragging the files to the TreenoConnect window. Treeno then stores the file according to the index values you enter or information that is pulled from the header of the e-mail message (To, From, Date, Subject). All files are stored in their native format.

With its simple XML-based configuration, the TreenoConnect can be interfaced with almost any product in a matter of minutes. Selected fields in the line-of-business application are mapped to index fields in a Treeno cabinet, allowing you to quickly search for and process documents. Because the TreenoConnect configuration file is stored on the server, new product changes can be deployed instantly.

About The Guide

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

Types of Integration

Installing

Configuring

Using the Full Version of TreenoConnect

Using the Importer

Importing E-mails

FEATURES OF TREENOCONNECT

What You Can Do With Treeno Connect

- Find a document in Treeno using unique search criteria from your line-of-business application.

- Automatically update a document's index values in Treeno with record infor mation that you change in your line-of-business application.

- Link unprocessed documents in your Treeno inbox with the currently open window in your line- of-business application. The required metadata is pulled from the line-of-business application and your inbox documents are automati cally indexed and routed to the appropriate location in Treeno.

- Quickly add a local or network file to Treeno by dragging it to the TreenoConnect. The TreenoConnect then uses metadata from the open line-of-business application to auto-index the file in Treeno.

- Associate Microsoft® Outlook® emails with customer or vendor information. When you drag an email to the TreenoConnect, the To, From, Subject, and Date lines are added to Treeno as possible search criteria. Emails that were once hid den away in user inboxes instantly become valuable business assets that are available to all the right people.

TYPES OF INTEGRATION

TreenoConnect can be used with any Windows-based, web-based, or green screen line-of-business application.

Windows-Based Applications

TreenoConnect is designed to work out-of-the-box with Windows-based software. Installed directly on your workstation, the TreenoConnect supports most client-server applications and can read information from common user interface controls (text boxes, date fields, title bars, etc.). This interaction with the line-of-business application allows the TreenoConnect to be "aware of" the current record that is being viewed in the window.

You can search for documents in Treeno using unique information in the record that is currently open in your line-of-business application. In some integrations, you can also auto-index documents in Treeno using record information that is pulled from the line-of-business application. Updates to the record in the line-of-business application are reflected in the index values for the associated document in Treeno.

For example, in a shipping and purchasing transaction, some of the required information, such as the purchase order number, is provided immediately. However, it isn't until much later in the process that the packing slip number or vendor invoice number is known. By updating the record on the fly, Treeno maintains all relevant indexing information in Treeno, so it can always be searched on and referenced most accurately.

Web-Based Applications

Treeno's TreenoConnect is also used for integrating with web-based line-of-business applications, such as Salesforce.com and Peoplesoft. These applications embed unique identifying information within the application itself. The index information is sometimes found in html tags, xml data, or title bars. Every application is different, but Treeno's common configuration set allows all of the features of the TreenoConnect to be leveraged across applications. For some applications, such as Salesforce.com, Treeno is also able to pull additional indexing information from the product using Web Services.

Because Treeno is able to securely and efficiently use data from your CRM application, users are not required to manually name the documents in order to index them.

Green Screen Applications

Treeno can be integrated with legacy systems that are often referred to as "green screen" applications. These text-based applications are accessed using terminal emulator software that resides on end user workstations. The most common of these applications is IBM's AS/400 system, which is used frequently in banking, financial services, insurance, and the automotive industry. Treeno's integration is similar to that of client-server products; however, instead of relying on common user interface controls, such as text boxes, Treeno uses text coordinates to extract the information.

Because of the way green screen applications are designed, similar data is always placed in the same location and is a fixed size. Using a configuration file within the TreenoConnect, Treeno defines where the coordinates are for the unique indexing values being viewed in the green screen application.

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INSTALLING TREENOCONNECT

TreenoConnect is available as two different installations: Full or Importer

System Requirements

The following are the minimum system requirements for TreenoConnect.
• Microsoft® Windows® XP or later
• Microsoft .NET Framework 3.5 SP1 (version 2.0 is supported by Sagitta, PeopleSoft, and BenefitPoint integrations)

TreenoConnect Full Version Install

1. **Open the Treeno Plugins page:**
   http://saas.treenosoftware.com/treeno4/

2. **Click TreenoConnector.zip.**

3. **In the File Download dialog box, click Save to save the installation files and then browse to the appropriate folder.**

4. **Unzip the TreenoConnect folder.**

5. **Double-click setup.exe.**

6. **If an Open File – Security Warning dialog box opens, click Run.**

7. **In the Welcome window, click Next.**

⚠ To install successfully, both versions of the TreenoConnect require .NET Framework 3.5.

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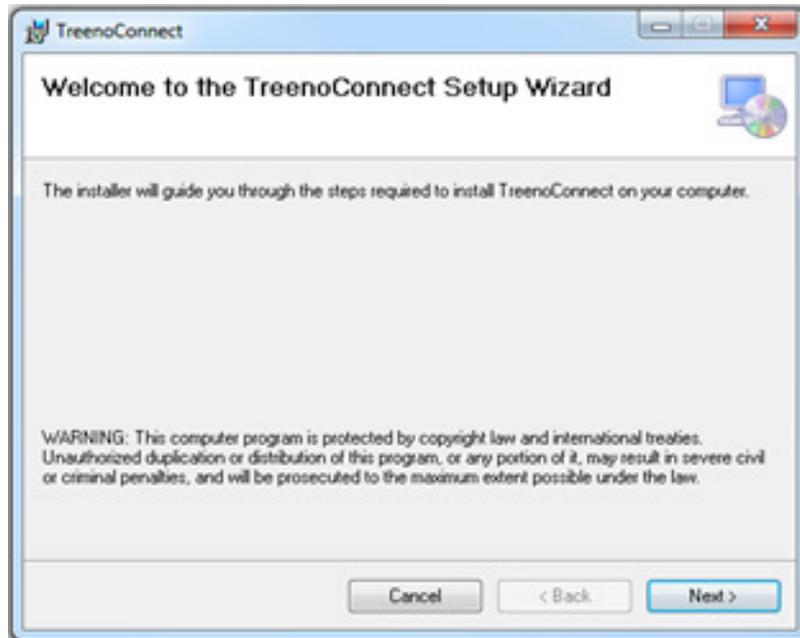
8. **In the Select Installation Folder window, do the following:**
    - **Click Browse if you want to install the TreenoConnect to a different location than the default folder that is displayed.**
    - **Select Everyone, and then click Next.**

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

8
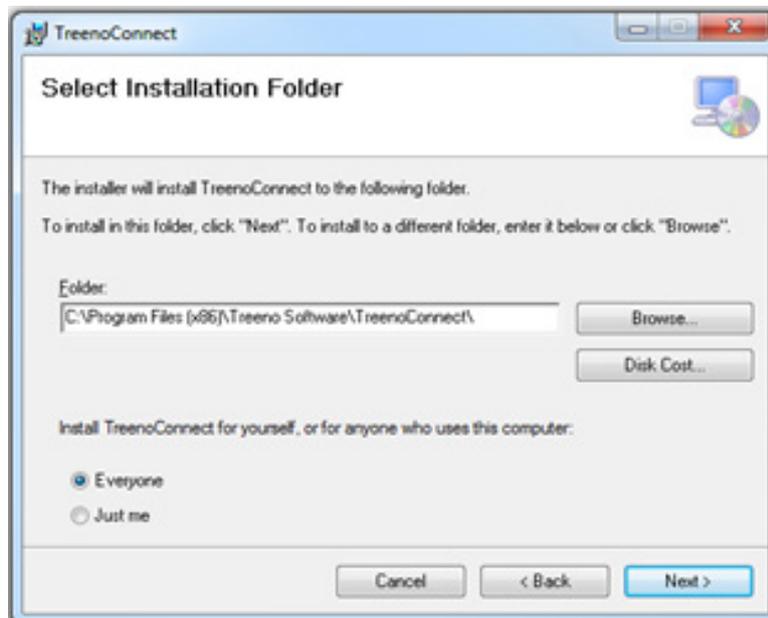
TreenoConnect and Importer
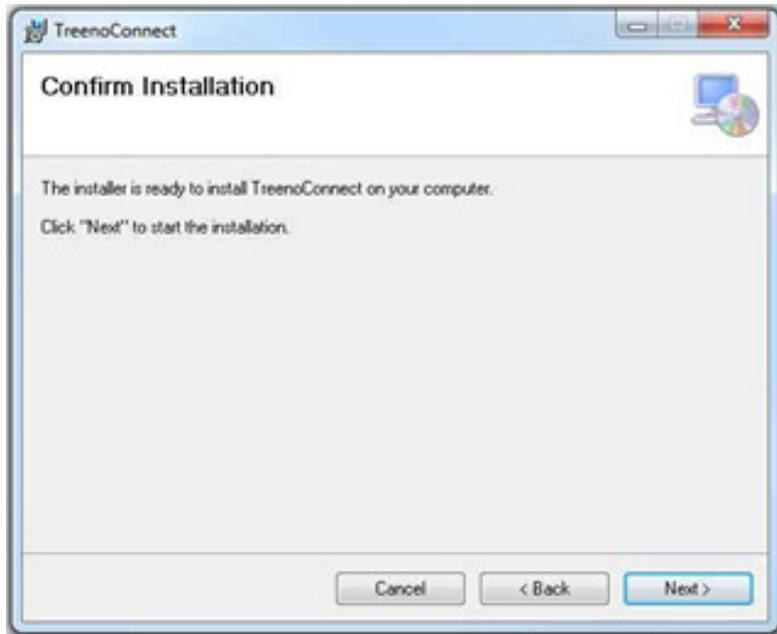
10. When the installation is complete, click Close.
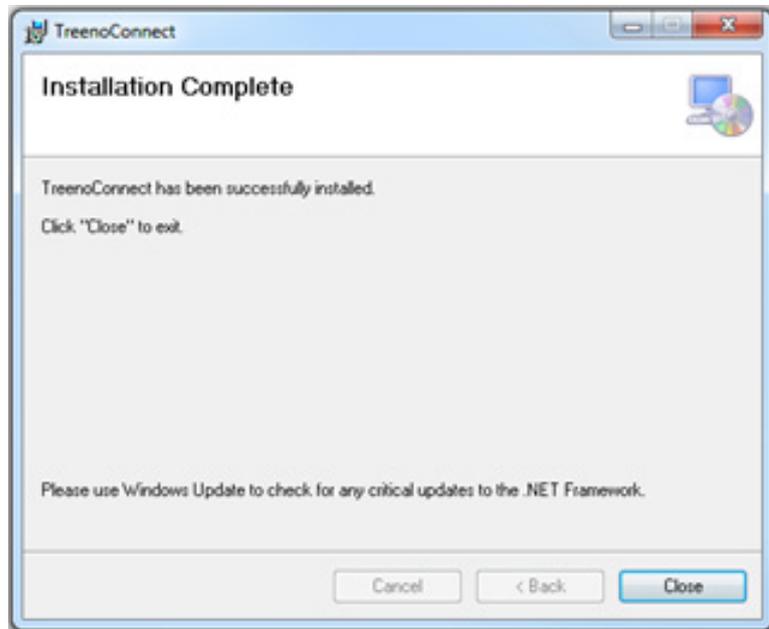
11. To configure the TreenoConnect, go to Start > Programs >
Treeno Software > TreenoConnect
(see page 12).

TreenoConnect and Importer

INSTALLING THE IMPORTER VERSION

Installing the Importer Version of TreenoConnect

1. Open the Treeno Plugins page:
   http://saas.treenosoftware.com/treeno4/
2. Click IndexOnlyIntSetup.zip.
3. In the File Download dialog box, click Save to save the installation files and then browse to the appropriate folder.
4. Unzip the Importer folder.
5. Double-click setup.exe.
6. If an Open File – Security Warning dialog box opens, click Run.
7. In the Welcome window, click Next.
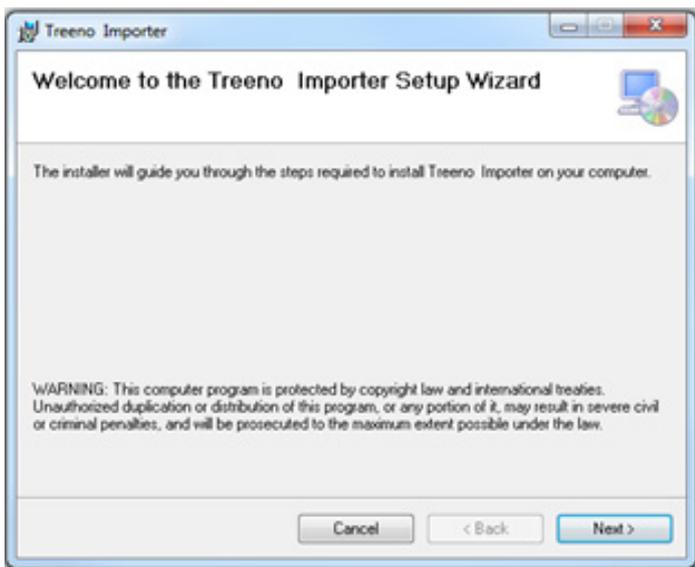
8. In the Select Installation Folder window, do the following:
   - Click Browse if you want to install the Importer version to a different location than the default folder that is displayed.
   - Select Everyone, and then click Next.

TreenoConnect and Importer
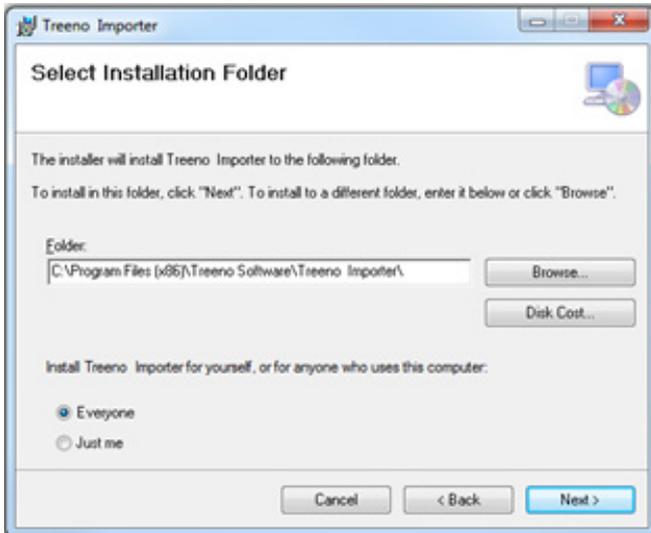
9. **In the Confirm Installation window, click Next to start the installation.**
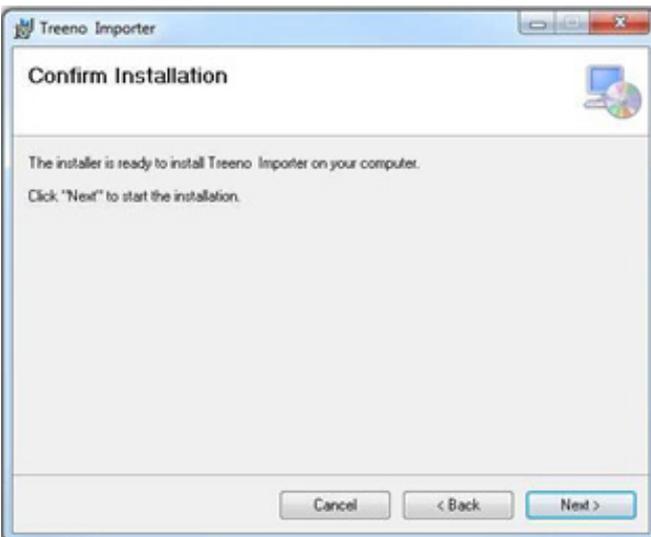
10. **When the installation is complete, click Close.**
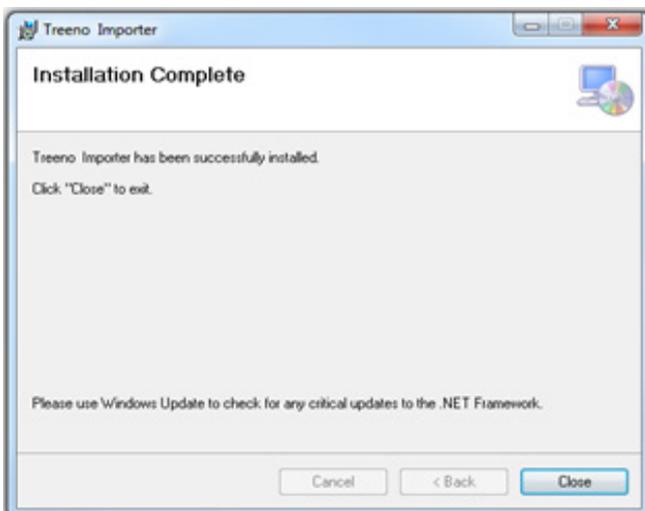
11. **To configure the Importer version, go to Start > Programs > Treeno Software > Importer Integrator**
    (see page 12).

TreenoConnect and Importer

CONFIGURING

After Installation

After you have installed TreenoConnect, you must provide all the information needed to connect to and access Treeno. You configure the TreenoConnect using the Treeno Setup window.

1. **Do one of the following:**
- **Full TreenoConnect version: Go to Start > Programs > Treeno Software > TreenoConnect.**
- **Importer version: Go to Start > Programs > Treeno Software > Importer Integrator**

The Treeno Setup window opens.

2. **Enter the Treeno user name and password for the individual who will be using the TreenoConnect to process files. Confirm the pass word for accuracy.**

TreenoConnect and Importer

Configuring TreenoConnect *(continued)*

3. **Select the LDAP check box if you use an LDAP connection to log in your Treeno server.**

4. **In the Host field, enter the IP address or DNS name of your Treeno server.**

5. **Select the Secure Connection check box if you use an encrypted connection to your Treeno server (https://).**

6. **Click Get List to retrieve a list of departments the user has access to in Treeno.**

7. **In the Department drop-down list, select the Treeno department where files are imported by default. Users can select a different department when they are using the TreenoConnect.**

8. **Select one or more of the following options:**

•   **Use QuickEmail Import – Select to auto-index emails as they are dragged to the TreenoConnect. Email information, such as the To, From, Subject, and Date lines, are added to the Treeno folder as index values.**

•   **Delete Email After Import – Select to delete the email from the native application (for example, Outlook) after it is imported into Treeno. This option is available only when Use QuickEmail Import is selected.**

•   **Auto Create Folder on Search – Select this option to automatically create a new folder in Treeno when a match cannot be found for an open record in the line-of-business application.**
    The user can then print a Treeno barcode that routes the scanned document direct ly to the folder in Treeno. If Auto Create Folder on Search is cleared, the user will be prompted to create a new folder when a match is not found in Treeno for the open record. *Applicable only to the full TreenoConnect installation.*

•   **Show Debug Information – Select to display a history log that can be used by Treeno Technical Support to resolve any issues. *Applicable only to the full TreenoConnect installation.***

•   **Delete File After Import – Select to delete a file from its original location after it has been imported into Treeno.**

9. **Click OK. The TreenoConnect icon   is displayed**

TreenoConnect and Importer

USING TREENOCONNECT

The full version of TreenoConnect integrates with a specific line-of-business application, as configured by Treeno Software. Selected fields from that application are mapped to the index fields in a Treeno cabinet, allowing Treeno to identify the record or transaction that is currently open in the line-of- business application (the window you most recently clicked in). You can then use the TreenoConnect to do the following:

• Index unprocessed files that have been scanned into a central repository in Treeno, such as a user's inbox, using information pulled from the current record or transaction in the line-of- business application.

• Create an empty folder in Treeno and populate its index fields using information from the current record or transaction in the line-of-business application. Related documents can then be scanned directly into this folder.

The TreenoConnect resides in your system tray, as indicated by the icon displayed, go to Start > Programs > Treeno Software > TreenoConnect

NOTE: You can also add a local or network file to Treeno by dragging the file on to the Index button in the TreenoConnect window. You do not need to be integrated with the file's native application. The format of the file is preserved in Treeno**. For information on using the drag-and-drop method, see "Importing Files Using Importer" on page 20.**

TreenoConnect and Importer

TreenConnect Shortcut Menu

The shortcut menu for the TreenoConnect is accessed by right-clicking the icon in the system tray. **The following options are available on this menu:**

• Show Window – Displays the TreenoConnect window with the Search and Index buttons and the Department drop-down list.

NOTE: You can also open the TreenoConnect window by simply clicking the icon in the system tray.

• Configuration Tool – Opens the Treeno Setup window where you can make any necessary changes to the TreenoConnect's configuration options (see page 13).

• Show Window Properties – Used by Treeno Technical Support to identify the unique properties of the window that is currently open. Used for debugging purposes.

• Show All Windows – Used by Treeno Technical Support to identify the unique properties of all open windows. Used for debugging purposes.

• Exit Integrator – Closes the TreenoConnect. The icon no longer appears in the system tray. To open the TreenoConnect again, go to Start > Programs > Treeno Software > TreenoConnect.

Indexing Files in The Treeno Inbox

Occasionally, large batches of documents are scanned and sent to a central repository in Treeno, such as a user's inbox, where they wait to be processed. Using the TreenoConnect, you can automatically route each of these files to the appropriate folder in a Treeno cabinet. **To index files in the Treeno inbox:**

1. Start TreenoConnect by clicking the icon in the system tray. If the icon is not displayed, go to Start > Programs > Treeno Software > TreenoConnect.
(continued next page)

Indexing Files
In The Treeno Inbox

continued
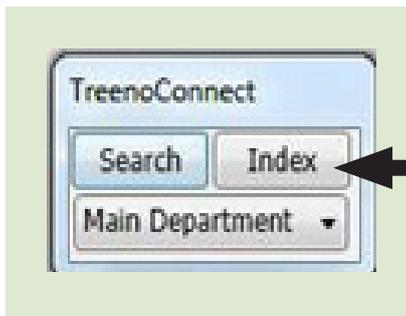
2. Open Treeno and click the Inbox icon to view a list of unprocessed files that have been scanned to your Treeno inbox.

3. Select a file in your inbox that you want to process.

4. Open the line-of-business application and find the record whose information you want to use to route a file from your inbox to the appropriate folder in Treeno.

5. In the TreenoConnect window, click Index.

6. The TreenoConnect searches for an existing folder in Treeno whose index values match the mapped field data in the open record. One of following then occurs:

• If a matching folder exists in Treeno, the file is automatically moved from your inbox to that folder.

• If a matching folder does not exist in Treeno and the Auto Create Folder on Search check box is selected in the Treeno Setup window (see page 14), a new folder is automatically created for the file in Treeno. The folder's index fields are populated using data from the open record and the file is automatically moved from your inbox to the folder.

• If a matching folder does not exist in Treeno and the Auto Create Folder on Search check box is not selected, a message prompts you to create a new folder. Clicking Yes automatically creates the folder and populates its index fields with data from the open record in the line-of- business application. The file is then routed from your inbox to the folder.

7. Repeat steps 3-6 to index additional unprocessed files that have been scanned to your Treeno inbox.

Working with Cabinets in Document View

If you are integrated with a cabinet that uses the Document Type View, the Index To Document window allows you to select a document type for a file you are processing and enter the appropriate index values for that type.
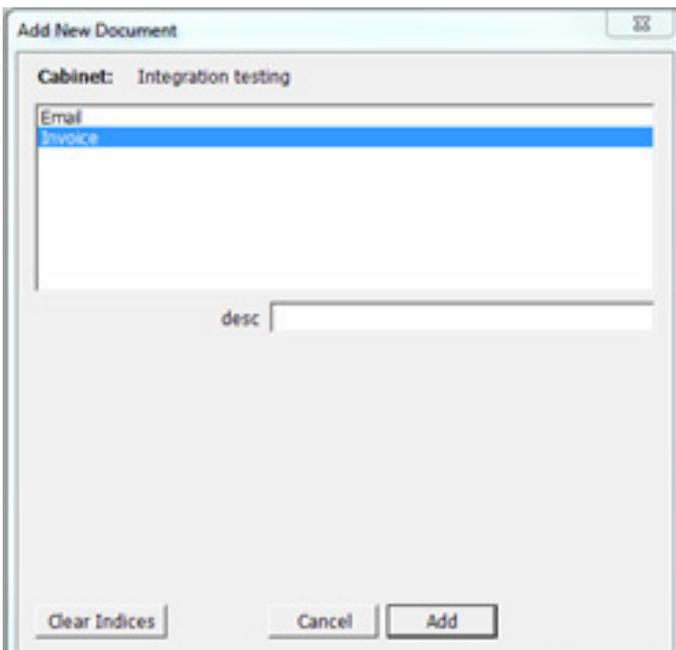
When you click Index, the file is moved from your inbox to the appropriate folder in the Treeno cabinet. (This folder already exists in Treeno or is created by the TreenoConnect during the search process.) The file is assigned the document type you selected along with the index values you entered.

Indexing Files in Other Folders

If addition to processing batches of scanned documents, you can use the Treeno-Connect to create folders in Treeno whose index fields are populated from the open records in your line-of-business application. Users can then print barcodes to these folders and scan documents directly into them.

NOTE: File Monitor is required to scan documents directly into Treeno

To index files in other folders

Start TreenoConnect by clicking the [icon] **icon in the system tray. If the icon is not displayed, go to Start > Programs > Treeno Software > TreenoConnect.**
(continued next page)

Indexing Files
In Other Folders   continued

2. **Open the line-of-business application and find the record whose information you want to use to rcreate a new folder in Treeno.**

3. **In the TreenoConnect window, click Search.**

4. **The TreenoConnect searches for an existing folder in Treeno whose index values match the mapped field data in the open record. One of following then occurs:**

- **If a matching folder exists in Treeno, the folder is displayed in the Treeno browser window.**
- **If a matching folder does not exist in Treeno and the Auto Create Folder on Search check box is selected in the Treeno Set-up window (see page 14), a new folder is automatically created in Treeno. The folder's index fields are populated using data from the open record.**
- **If a matching folder does not exist in Treeno and the Auto Create Folder on Search check box is not selected, a message prompts you to create a new folder. Clicking Yes automatically creates the folder and populates its index fields with data from the open record in the line-of- business application. Clicking No cancels the operation.**

5. **When you are ready to scan documents, navigate to the folder you just created in Treeno.**

6. **In the right-hand pane, do one of the following to open the Print window:**

- **To print a barcode to the main folder or the current document type (Document Type View only), click the Print Barcode ▌▌▌ icon.**

NOTE: A cabinet must be configured in Document Type View to print bar-codes for document types

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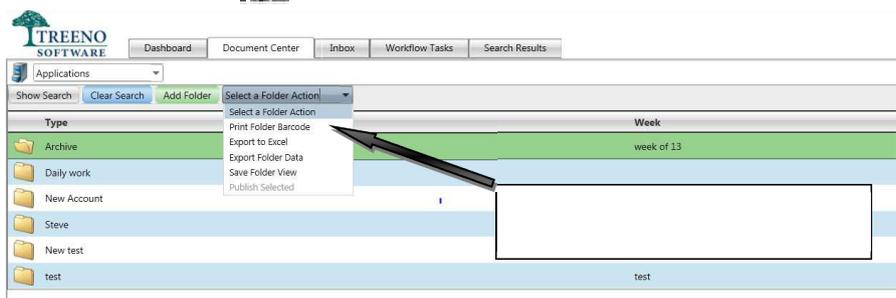
USING IMPORTER

After you have configured the Importer application, you are ready to begin using the tool. The Importer tool resides in your system tray, as indicated by the ![icon] icon. If this icon is not displayed, go to Start > Programs > Treeno Software > TreenoConnect.

Importer Shortcut Menu

The shortcut menu for the Importer is accessed by right-clicking the icon in the system tray. **The following options are available on this menu:**

- Show Window – Displays the Treeno Integrator window .

NOTE: You can also open the Treeno Integrator window by simply clicking the icon in the system tray.

- Configuration Tool – Opens the Treeno Setup window where you can make any necessary changes to the TreenoConnect's configuration options (see page 12).

- Exit Integrator – Closes the TreenoConnect. The ![icon] icon no longer appears in the system tray. To open the application again, go to Start > Programs > Treeno Software > TreenoImporter.

Importing Files Using Importer

The Importer application does not integrate with a third-party line-of-business application. Instead, you import a local or network file into Treeno by dragging the file to the Treeno Integrator window. You then search for a folder in Treeno whose index values match information in the file (for example, invoice number, vendor number, etc). **(continued next page)**

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Importing Files Using Importer

Continued

If a matching folder exists, you can add the file to it. If a matching folder does not exist, you must create a new one, specify its index values, and then add the file to it.

You can also choose to store a file in your Treeno personal inbox or assign the file to a workflow. All files are stored in their native format.

To import files using Importer

1. Click the **icon in the system tray to open the Treeno Importer Integrator.**

NOTE: If the icon is not displayed, go to Start > Programs > Treeno Software > TreenoConnect.

2. Drag one or more files to the Treeno Integrator window.

The Treeno Browser window opens.
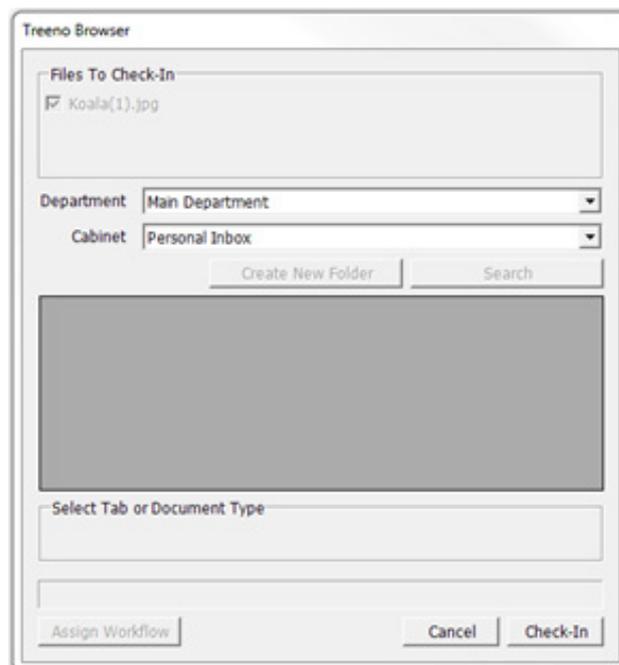
TreenoConnect and Importer

Importing Files Using Importer

Continued

3. **If necessary, select a different department than the displayed default.**

    NOTE: You can also select a different department n the Treeno Integrator window before dragging a file to it.

4.   **Do one of the folowing:**

    *   **Select the cabinet where you want to store the file and proceed to the next step.**

    *   **Select Personal Inbox to route the document to your Treeno inbox, and then click Check-In. You are now finished.**

5. **Click the Search button to see if a folder for the file you are importing already exists in the selected cabinet.**
    The Search window opens and displays the cabinet's index fields.

6. **Enter one or more index values to search for the folder. For example, if you are importing an invoice into the Accounts Payable cabinet, you could search by the invoice's purchase order, vendor number, vendor name, or invoice number, as shown below.**

7. **Click Search.**

8. **Do one of the following:**

    *   **If a match is found, the folder is displayed in the search results area of the Treeno Browser. Proceed to step 10.**

TreenoConnect and Importer

Continued

Importing Files Using Importer

Folder with matching index values already exists in Treeno
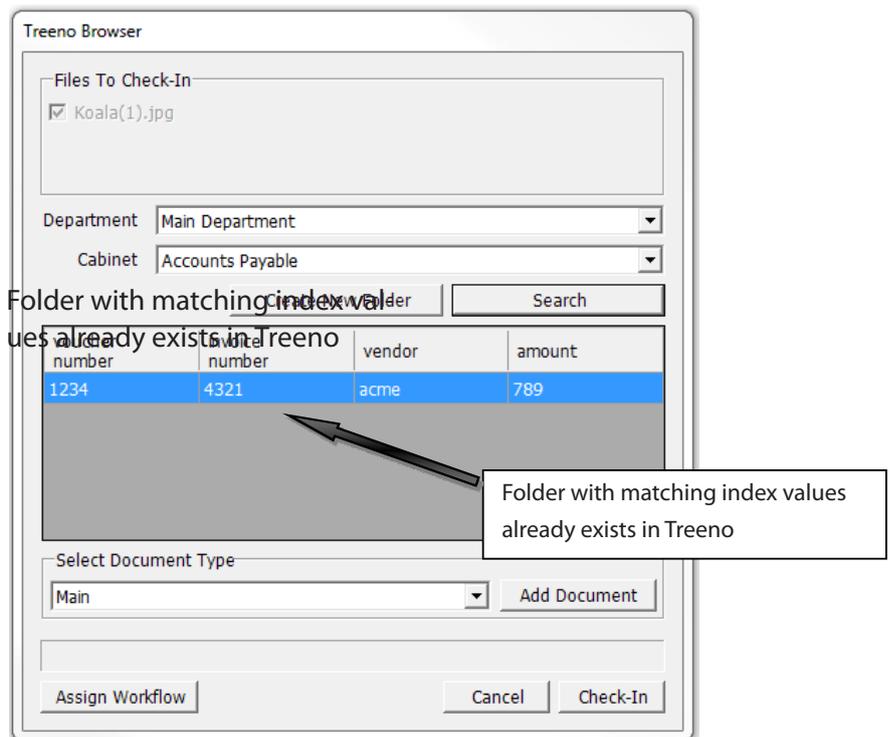
- If a match is not found, click Create New Folder to create a new folder in Treeno for the imported file. Proceed to step 9.

9. In the Add New Folder window, enter the index values for the file you are importing, and then click Add.

The folder you created is displayed in the Treeno Browser.

10. Do one of the following:

- If the selected cabinet uses Folder View and is configured with default folder tabs, select the tab where you want to store the imported file.

- If the selected cabinet uses Document Type View, select a document type to assign to the imported document. If the document type you need is not displayed in the drop-down list, click the Add New Type button, select the appropriate document type, and click Add.

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Continued

Importing Files Using Importer

11. **To assign a workflow to the imported file, click Assign Workflow.**
    The Assign Workflow window opens.

12. **Select the appropriate workflow and workflow owner and click Assign.**

    When the file is imported into Treeno, it will automatically be sent to the first node in the workflow.

13. **Click Check-In.**

    The file is added to Treeno using the index values of the new or existing folder.

IMPORTING EMAIL

You can use either the full or Importer version of the TreenoConnect to import Microsoft Outlook e- mails into Treeno. E-mails can only be imported into cabinets configured in Document Type View. A document type must already be defined in Treeno that includes the following index fields: To, From, Subject, and Date.

To import Emails into Treeno

1. **Click the** ⬙ **icon in the system tray to open the Integrator window.**

2. **Open the e-mail in Outlook that you want to import into Treeno.**

3. **Drag the e-mail from Outlook to the Index button in the Integrator window. The Treeno Browser window opens.**

4. **If necessary, select a different department than the displayed default.**

5. **Select the cabinet where you want to store the e-mail.**

6. **Click the Search button to see if a folder for the e-mail you are importing already exists in the selected cabinet.**
The Search window opens and displays the cabinet's index fields.

7. **Enter one or more of the folder's index values and click Search.**

8. **Do one of the following:**

- **If a match is found, the folder is displayed in the search results area of the Treeno Browser. Proceed to step 10.**

- **If a match is not found, click Create New Folder to create a new folder in Treeno for the imported e-mail. Proceed to step 9.**

In the Add New Folder window, enter the index values for the e-mail you are importing, and then click Add.   The folder you created is displayed in the Treeno Browser.
10. Select the E-mail document type.
11. Click Check-In.

The E-mail is added to Treeno.