Treeno EDM Training

Departmental Users
Introduction:

The Educational and Development Foundations use the archiving service Treeno EDM (Electronic Document Management) to manage and store content. The files that you will access via the web are hosted on Treeno. This training manual will cover the files and information that will be available to you via the web, how to navigate around the website, and how to view and/or export documents. Please note that documents may not be downloaded to a laptop, portable device or webhosting service.

Terminology:

- **Cabinet**: A Treeno Cabinet is similar to a regular physical filing cabinet. Each Foundation has its own virtual cabinets that store documents.
  - Like regular filing, once you open a cabinet it will be full of **Folders** containing one or more **Documents** that you may view.

- **Dashboard**: The personalized homepage for each individual that is customized to display all the functions that individual will utilize.

- **Document Center**: Displays the folders in a selected cabinet. It can be accessed from the dashboard or from the Document Center tab.

- **Search Terms**: Search terms provide valuable information about a folder as well as a way to find that folder in the database. The terms used to identify a specific folder vary by the type of document they contain. The main document types and their search terms are:
  - **Check Requests**
    - Check Number
    - Vendor
    - Payment Date
    - Project Id
    - Proj Amount
    - Check Amount
    - Description
    - Invoice Number
    - Project Description
    - College
    - Department
    - Fiscal year
  - **Projects**
    - Project Id
    - Description
    - Entity
    - Type
    - Status
    - Start Date
    - College
    - Department
To log in:

- Open Internet Explorer (Please note that the Treeno EDM will not work properly in any other Browser).

- Enter the following web address in the address bar: https://tr1.treenosoft.com
  ➢ Note the links to the left of the screen. These are corporate news, announcements and training videos from Treeno.

- Type in your username and password in the correct boxes on the right of the screen and click login. **NOTE: The username and password are case sensitive.**

If you forget your username or password:

Please contact Wayne Siron. He will notify you when your username or password has been reset (contact information is on the last page).

Questions:

For any content questions or concerns please contact Ana Barber. Technical issues should be directed to Wayne Siron (further contact information is on the last page).
Dashboard Configuration:

Your customizable Dashboard will load when you log in. Right now it is blank and will need to be set up to fit your needs in the future.

First select the Dashboard Configuration button under the Treeno logo.

This will bring up an options menu to add widgets to your Dashboard. The only widget needed is the Cabinet List. Use the drop down menus to select One Column, Cabinet List and Column 1 as shown below. Then Select Add Widget. You may select Dashboard Configuration again to remove the configuration menu.
Your Dashboard should now look like the example below.
Navigation:

The Treeno workspace consists of five tabs. You will only be using the Dashboard, Document Center, and Search Results tabs.

The Dashboard tab is the default tab that will open upon logging in. As discussed previously it will now contain a Cabinet List that displays every cabinet you have access to in Treeno. When you select a cabinet you will automatically be taken to the Document Center tab. You will also be taken to the Search Results tab when using the system search bar (upper right of the screen). You may navigate automatically like this or enter a tab by simply clicking on it.

- Dashboard:
  The Dashboard tab is the main screen from which you may access all cabinets by selecting them.
Document Center:
The Document center tab displays folders in your selected cabinet; below the IT cabinet has been selected. From this screen you may change cabinets, search by term, change the cabinet page you are viewing, select folders, and select documents.

- To **Change Cabinets** from this tab use the drop-down menu to display all of the cabinets then select a new one.

- To **Search by Term** make sure you have selected the *Show Search* button (which converts into a *Hide Search* button when selected). Then type a known term from the document you are searching for into the appropriate terms’ search box then press “Enter”. In this example the only two useable search terms are Description and Vendor Name.
➢ To change the Cabinet page, you may either use the arrow buttons in the upper left of the window or type in the page number you wish to access. You may also change the number of folders displayed per page in this same area.

➢ To select folders and documents, simply click them from this page. First click the folder you wish to enter and the documents it contains will appear at the bottom of the screen. You may then view, print or export the documents by clicking them to bring up the virtual viewer.
Search Results:
The Search Results tab simply displays the results of a system search. In this example the results for 4J5555 are shown. When you do a system search in the bar on the upper right of your screen you will be automatically taken to the Search Results tab. Once you navigate away from the tab your search will be saved as long as you do not implement another system search and you may return to it by selecting the Search Results tab.

Searching:
There are two types of search functions: Cabinet search & System search
- **Cabinet Search**: Every term used to identify a folder in the **Document Center** is searchable. If you have a **Check Number** for the check request you are searching for that is the simplest and most precise search term to use. However, any term (listed on pg. 2) can be used.

- To reveal the search fields for a cabinet select “Show Search” (circled above).
- A search field will descend under the corresponding term column (Shown below).
There is a filter icon next to each search field that expands into several search commands when selected (shown below). These search commands can be used to make a search more specific.

- **System Search**: The system search is a general search that searches every term in every cabinet. It can be found in the upper right of the window and be used as a shortcut to the **Search Results Tab** (pg. 7).

**Customizing Cabinet View:**

- **Sorting Folders**
  - You can reorder the folders in a cabinet in ascending or descending order by clicking on the name of the column header. Each click toggles the order between ascending and descending order.
• **Displaying/Hiding Columns**
  
  - To change which columns are visible, right click a **Column Header**. Hover over **Columns** on the menu that appears and then check or uncheck the desired header names to display/hide columns.

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**Viewing, Saving, and Printing Documents:**

Please note that documents may not be downloaded to a laptop, portable device or webhosting service. When you select a folder all the files that are stored in it appear on the bottom of your screen. In most cases this will be a single file. Click the file you wish to work with and it will be brought up in the **Virtual Viewer**. To print or save simply right-click on the displayed document and select **Save As** to save or **Print** to bring up the Print Preview screen.

**To Log Out:**

When you are ready to log out, select the **Logout** button at the top right of your screen. Once you do this the original Log in screen will be displayed.
## Contact Information:

<table>
<thead>
<tr>
<th>Staff Member</th>
<th>Phone Number</th>
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<th>Type of Question</th>
</tr>
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<tbody>
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