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Treeno Document Management System v 4.0

(800) 528-5005 x315 or (603) 570-4315

www.TreenoSoftware.com

From the [May 2013 review](#) of Document Management systems.

Best Firm Fit:

- Firms who want a product which can be accessed through a web browser or using an on-premises server.
- Companies who would like a very flexible document management system which is designed for use with a wide range of industries.

Strengths:

- Web-based application with both on-premises and hosted deployment options.
- Treeno has a bar-code scanning utility which allows documents to be scanned in batch and automatically routed to a specific folder.
- The product contains integrated tools for annotation and markup of any virtual viewer supported file type including but not limited to Word, PDF and TIFF files, and has a previewer which will display content from over 100 other file formats. Annotated files will be turned to a TIFF or PDF for export.
- Simple, customizable dashboard feature allows users to see workflow tasks, their personal inbox, and the available cabinets on a single screen.
- Treeno offers a software developers toolkit (SDK) as well as tools to identify required missing documents for folders created from a template.

Potential Limitations:

- Limited integration with commonly used tax applications, and limited exposure to

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Treeno Document Management is a web-based application which allows users to organize multiple versions of documents into a cabinet structure with an inbox, check in and check out, cabinets, and varying workflows based on the document type processed. Unlike products which are designed to meet the needs of a specific industry, this product is a general document management system which can be reconfigured to meet the needs of multiple industries, although it is slightly more structured than some of the most flexible applications considered in this review (GoFileRoom, NetDocuments).

The application does not interface directly with document scanners, but instead uses a number of tools which allow documents to be uploaded to Treeno's servers. Files can be dragged and dropped onto the Treeno Importer, an in-memory application which allows users to drag and drop supporting documents onto a small window which uploads them to the user's Treeno Inbox using metadata selected in the option's settings. An included application, TreenoConnect, can be used to scrape information out of application windows as well as the window title at the time a scanned image or supporting file is dragged and dropped onto the Importer. Scanned document images in TIFF and PDF format can be annotated with a browser-based markup tool.

Treeno includes a web-based preview tool, the Treeno Virtual Viewer, which allows users to preview over 100 different types of files from within a web browser. Files stored in Microsoft Word, Microsoft Excel, PDF, and TIFF format are indexed with an OCR text recognition tool for word-based searches. The OCR engine also recognizes barcodes, and users can attach a barcode sheet to scanned documents which automatically routes the images to a specific user's Treeno Inbox after processing.

Files can be shared with other users confidentially from an integrated client portal, which is available in both the hosted and the locally installed version of the software.

Treeno includes a number of compliance reports, and has a complete audit trail by

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training).

2013 Ratings:

Treeno Document Management	
Core Product Functions/Features	3.0
Document Workflow	4.0
Document Control	4.0
Special Features	4.0
Overall Rating	3.75

Firm Management • Technology

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