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Treeno Software, Inc. – Treeno Document Management 4.0

800-528-5005

www.treenosoftware.com

Best Firm Fit

Treeno is a good fit for small to mid-size firms that don't want to deal with all of the technology issues and capital investments by leveraging the SaaS option. If your practice uses software from a variety of vendors, then the integration tools provided to help you leverage the functionality of Treeno from a multitude of applications is a real plus.

Strengths

- Option to deploy as a SaaS or on-premise solution
- Customized bar code scanning utility to streamline the scan and store process
- Comprehensive workflow module with rules based routing
- Built-in annotation tools, including redaction
- 100+ file format previewer
- Integrated portal

Potential Limitations

- Limited penetration of accounting firm market

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application to access document cabinets and review workflows tasks.

- The “document center” is where you manage all of your files including uploading files and organizing them, initiating a document workflow, searching and editing documents. Users can customize the document listing interface for their individual preferences to eliminate unnecessary file information.
- Treeno boasts “19 simple methods to upload documents and files.” These include: drag and drop from your desktop, creating custom bar codes with your metadata values for automating the scanning and filing process, a file upload button that can be accessed from any application and more.
- Searching can be done at the metadata and full text level.
- The Treeno Virtual Viewer lets you preview files in over 100 formats without having to launch the native application. This significantly reduces the time it takes to access the document information you are looking for.
- Document access controls include view only access, versioning to archive and track multiple iterations of the file. A detailed access audit log is maintained.
- Built-in annotation tools include redaction, highlighting, image stamps and drawing. A log of who recorded an annotation with a date/time stamp is included.
- A built-in document workflow application allows you to establish your business processes using a graphical configuration tool. As a document works its way through the process, it can be automatically routed to the next person in line, who then receives an alert via email notification.
- Documents can be published directly to a secure portal.

Summary & Pricing

Treeno falls into the category of “horizontal” DMS solutions. This means that is designed to be deployed in a variety of industries, reaching well beyond accounting

and tax practices. It does not have direct integration with client accounting and tax

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Case Study

Firm Profile

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ultimately the various university departments which will result in approximately 200 users.

The system is being deployed in phases. Phase I focused on scanning and filing 4,600 permanent files and the multitude of documents within each of them. Phase II was to set up Treeno to push information to the outside auditors, resulting in significant time savings. Phase III will be focused on managing the documents that support the numerous journal entries that the foundation processes on a monthly basis.

Scanning Model

At this stage of the implementation all scanning is “back end” at the end of the business process. This facilitates electronic archival and retrieval. In the next phase some documents will be scanned on the front end. They have not decided on their annotation approach yet since they are only in back end scanning model at this point.

Benefits Achieved

Bottom line is that it is so much more efficient in terms of locating files. No more time wasted searching for them. Foundation staff members have been able to minimize their role of facilitating access to documents by external users by providing them with direct and secured access. They have been very happy with the security features, which is extremely important with the confidential nature of the documents they work with. The security process is streamlined by adding users to groups and establishing access rights at the group level. The multiple fields available for metadata tagging provides a great deal of flexibility to organize files according to their unique needs.

Favorite Features

- Treeno customer service has been “really good.”

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- It is very important to think through what you want ahead of time. Particularly the metadata values and where they will come from.
- Communicate with the Treeno team and “ask questions.” Things they thought were undoable turned out to be doable after consulting with Treeno personnel.
- Everyone was concerned with speed, but it has not been an issue.
- They highly recommend the Fujitsu Fi-6130 scanner.

Technology

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