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## **Case Study**

### **Firm Profile**

**University Foundations – University of South Carolina, Columbia, SC**  
[www.sc.edu/foundations](http://www.sc.edu/foundations)

**Contacts – Susan Smith, CPA and Kim Elliott, CPA**

This organization is a nonprofit foundation providing accounting and financial services support to the entire university. There are currently seven active users of Treeno with plans to expand to the full foundation staff of twenty-three and ultimately the various university departments which will result in approximately 200 users.

[Click here for the May 2012 Review of Treeno Document Management 4.0.](#)

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

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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.”
- Outlook integration works really well and is “seamless.”
- Running as a SaaS application has been a real positive. They were concerned about privacy and security at first. However, after conducting their due diligence, it was determined that there was no way they could justify the cost differential of an on-premise deployment.
- Ability to get a DVD with their files in their native format on demand.

### **Lessons Learned**

- 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.

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