3926 characters

800-528-5005

treenosoftware.com

Treeno Software is another new entrant to our DMS reviews this year with its Treeno Content Server. My first impression is positive. I like the fact that it is offered as a web-hosted or on-premise solution and that it is browser-based. Treeno Software is a relatively small company with a staff of 12 and was founded in 2002. This is not an accounting-centric application, but the vendor does currently offer integration with UltraTax CS and has a commitment to integrate with ProSystem fx Tax and Lacerte. However, it is a well-designed solution with an intuitive, easy-to-use interface.

Core Product Features & Functions

The browser-based interface is easy to navigate. A navigational panel for searching documents, entering notes and other functions appears along the left side of the screen. The document hit list is displayed in the middle of the screen, and a document previewer appears to the right. The toolbar that appears across the top is refreshingly simplified.

The organization of document storage is highly configurable. You can establish the metadata indexing structure based upon unique categories of documents, i.e., tax, financial statements, payables, etc. A print driver is provided to publish output from Windows applications directly into Treeno as PDF files. A series of management reports is available to administer your DMS database. An OCR module converts documents into searchable text at the server level. 4.5

Integration

approach. The metadata values for indexing the document will be automatically applied based upon pre-mapped values set up for that application. Workflow functionality is enabled by setting up a document routing path, and email alerts are sent to recipients of routed documents. 4.25

Remote Capabilities

Based on the fact that Treeno is a browser-based application that is available as either a hosted solution or to be deployed on-premise, it meets the mark for enabling anytime, anywhere remote access. Portal functionality is enabled by setting up clients with a limited access login that will only present "published" documents. The portal is a pointer to the original document file in the DMS. 4.75

System Management

Documents can be secured at the cabinet, document type or individual file level. An audit trail of all activity in the system is maintained. You can set up document retention scripts based on pre-defined rules established at the cabinet or document level. Documents are checked out to the local drive for editing. 4.5

Summary & Pricing

Treeno offers an attractive DMS solution. The Treeno Button feature to configure direct integration with any Windows application is appealing. Unfortunately, at this time, the application is deployed in only a few accounting firms. Pricing for Treeno is offered in three flavors. The web-hosted SaaS option is priced at $50 per concurrent (shared) user login, per month. The on-premise software for deployment on your own server infrastructure is priced at $6,995. The third option is an "appliance" offering where you purchase a turnkey on-premise solution with the software pre-installed on a file server. This simplifies the technology deployment for an on-

premise solution. Pricing for the appliance solution is $7,995 for 10 concurrent

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