Treeno Enterprise Document Management

Cloud Software-as-a-Service FAQs

Q **Who is Treeno?**

A Established in 2002 and located in Portsmouth, NH, Treeno Software has grown to become a leader in the Enterprise Document Management (EDM) industry. Treeno Software was the industry's first to embrace cloud computing with the Treeno EDM Cloud (SaaS) and to provide web-based solutions offering secure global mobile access. Treeno Software's mission is to provide their customers with operational workflow efficiencies and measureable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web browser-based Enterprise Document Software Solution.

Q **What is Software-as-a-Service?**

A Software as a Service, also referred to as "Cloud Computing," "Hosted" or "software on demand," is a software application that is deployed over the internet. User licenses are purchased via a monthly subscription model.

Software as a Service provides:
• Low IT overhead
• Anytime and anywhere information accessibility
• Instant scalability
• Security
• Reliability

Q **Are my documents and files secure?**

A The data center maintains audited advanced security systems equal to the most sophisticated systems of large corporations.

Operational Security includes:
• ISO17799 based policies and procedures, regularly reviewed as part of a SAS70 Type II audit process
• Biometric scanning for controlled data center access
• Security camera monitoring at all data center locations
• Fire Suppression
• Battery backup and indefinite operating power via diesel generators
• Off-site data backups

Q **Who owns my data?**

A With Treeno you always own and have access to your data. Treeno has a built in system that allows you to download selected data or all your data to a local data storage device. Treeno stores your data in a non-proprietary format so converting the data is never a problem.

Q **Is my connection to and from the SaaS system secure?**

A Treeno uses standard 128 bit Secure Socket Layer (SSL) encryption both sending and receiving data.

Q **What file formats do you support?**

A Treeno supports all electronic file formats.

Q **What scanning devices do you support for the scanning process?**

A Treeno is hardware independent so you have your choice of scanners.

Q **How do I receive technical support?**

A Technical Support is included in your monthly subscription fee. Call the toll-free support line 8 am – 8 pm EST.

Q **How do you provide training?**

A Treeno will provide individualized training for your organization. There is ongoing customer training provided once each month on various topics.

Q **Can I have a local copy of my documents?**

A Treeno has a built in feature that allows you to download all or a truncated selection of your data to a local storage device.

Q **How do I get my data back?**

A Treeno has a built in feature that allows you to download all or a truncated selection of your data to a local storage device.

Q **What is my minimum recommended network connection?**

A A standard DSL or cable internet connection is recommended.

Q **What browsers do you support?**

A Treeno supports all the latest browsers including Internet Explorer, Mozilla, Firefox and Safari.

Q **What software do I need to load on my desktop? What are my PC requirements?**

A All you need is your favorite web browser. To view tiff images, Treeno will recommend that you install Alternatiff which is a free tiff viewing tool. For assistance on install, a user can go to the settings tab and click on the install under the Setup Help function on the left-hand menu.

Q How can I get documents into Treeno?

A Treeno has over 19 ways to get documents into Treeno. The most common ways to import paper documents is to scan the documents to a user's inbox for indexing and filing. By placing a user's bar code routing sheet in front of the scan document or by programming the scan device to route directly to the user's inbox, documents can be routed automatically. Barcode routing sheets can also transfer scanned documents to batch processing location where many users can access the documents in queue to name and file. User can print out barcode routing sheets to auto file documents to a user inbox, batch processing area, or directly to a folder, a tab within a folder, or a document type in a folder.

Electronic files can be dragged and dropped to the Index Only Treeno Import Tool. This will allow the user to tag the file on import.

For additional methods please refer to Treeno Manual.

Q How do I get documents out of Treeno?

A Treeno has the ability to change tiff images to a single PDF file for export via email, print or the client's electronic fax solutions. Users can also zip multiple documents types from a single folder for export. With the Treeno Publishing Module, users can select an unlimited number of files for an external user to have secure remote access.

Q Do you integrate with my accounting package or other applications?

A Treeno can integrate with many business applications including but not limited to QuickBooks, Microsoft Navision, Microsoft Solomon, Microsoft Great Plains, MAS500, PeopleSoft, Sagitta, Pointman, and many more. To schedule an integration discovery meeting, please contact your Treeno representative at 1(800) 528-5005.

Q How do you integrate?

A Treeno has greatly simplified the process of integrating with line-of-business application through the use of Treeno's Legacy Integrator technology. This small .NET tool, which is installed on the end-users desktop, allows Treeno to identify the specific screen in the line-of-business application that is being viewed. With the click-of-a-button, the documents related to the currently-viewed screen will be displayed in Treeno. The Legacy Integrator automates the steps of launching the Treeno window, and logging the user in (with all their appropriate rights and permissions). The Legacy Integrator will also detect the record or transaction that is currently being viewed in your line-of-business application. For Example, if you are using a CRM application, Treeno will know that you are viewing the record for Acme Manufacturing. By clicking the "Search" button on the Legacy Integrator, it will quickly display only the documents related to Acme Manufacturing. Legacy Integrator is also able to auto-index or "link" documents to your line-of-business applications with a click of the "Index" button. The unprocessed documents in your Treeno inbox can will be selected and linked to the current screen in the line-of-business application, by clicking an "Index" button on the Legacy Integrator. This makes the job of naming the documents a simple process, as the metadata is pulled automatically from the line-of-business application.

Q **How do you help us address regulatory compliance requirements?**

A Yes, different users can have different permission rights to a document. Treeno provides read/write access, read only access and no access at all.

Q **Can we destroy the paper?**

A Treeno recommends that each business refers to their legal counsel for this decision. The majority of our clients do destroy their paper documents after a 30 day cycle. Treeno helps to address the Best Evidence Rule by having all documents stored in their pristine state. All originals are unalterable and all access and activity is audited.

Q **Is your system flexible enough to support all of our business needs in all of our departments?**

A Yes, Treeno is a flexible application that allows companies to leverage the solution in each and every department. Treeno provides the ability to build your own cabinets and indexing criteria via a simple administrative user interface.

Q **Do you have the ability to electronically notify a user that they need to work a file?**

A Yes, through the Treeno workflow engine, users can receive an email notification with a link to the file when it is their turn to view or process the file.

Q **Do you have workflow?**

A Yes, Treeno has workflow. Workflow will allow a document to physically reside on the server while users are notified electronically when it is their turn to work on or view the file.

Q **Is your system scalable for the number of users and the amount of storage?**

A Treeno is very scalable and can support an unlimited number of concurrent user access. Licenses can be added as an organization grows the solution for their business. Storage can be scaled to address the needs of each client. You receive 5 Gigabytes of storage per concurrent user which is aggregated on the system.

Q **Is my information backed up?**

A All information is replicated real time to a mirrored hard drive. All the information is backed up nightly and stored at another Rackspace hosting facility where it can be restored.

Q **Is the data compressed on the server?**

A All tiff images are compressed user standards based Group 4 compression. All other files are stored in their native format and are not compressed.

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