TREENO
S O F T W A R E

Abstract

You decide how and where to deploy your Treeno document management system:

• Locally on your own server

• In the cloud with the secure Treeno Document Management Cloud SaaS

Any way you choose to deploy Treeno Document Management you will quickly see the benefits of enterprise-class document management features and functions.

TREENO
S O F T W A R E

Feature	Treeno Document Server	Treeno Cloud SaaS
Document Management Functions		
Universal File Viewer	✓	✓
The built in viewer allows a file to be viewed by users without plug-ins or requiring the user to have the application on their desktop. The Treeno viewer supports viewing over 100 file types without requiring any plug-ins.		
Open File in Native Format	✓	✓
Open a file in its native format to view or modify.		
File Preview	✓	✓
With Treeno there is no need to open every file to see if it is the one you want. When rolling the mouse over a TIFF, .PDF and JPG file, users can see a high-resolution preview without opening the file. This preview allows the user to verify that the correct file is chosen prior to clicking and opening it.		
Versioning Optional	Optional	✓
Versioning is used to manage and control changes to a file or document. Collaboration is facilitated and users always have the latest correct file. Treeno Versioning allows an authorized user to check out an electronic file outside of Treeno to be modified. When the file is checked back in to Treeno, it is automatically assigned a new sequential version number. There is a detailed audit of who made the changes to the file and the date and time of the modification. By default, the most up-to-date document is available to other users. Authorized users have access to view all file versions. Treeno provides MS Word and MS Excel plug-ins that allow a document to be checked-out, modified and checked-in automatically – with the click of button.		
Annotation	✓	✓
Annotation provides the ability to electronically mark up files. Choose the color and highlight an area of a file. Stamp or overlay text. Draw arrows or shapes. The new file, as well as the unchanged original file, resides within Treeno. Authorized users can view all changes to the file; see who made them, and the date and time stamp.		
Sticky Notes	✓	✓
Add notes to a file without modifying the original file.		
Redaction – Electronic White Out	✓	✓
Redaction helps to secure sensitive information on a document file. Authorized users secure information easily by clicking the mouse on the information that needs to be hidden, either from internal users, or prior to sending the file to an external recipient. The redaction block is burned into the file so that external users cannot remove the security overlay. Redaction helps companies secure confidential information easily – essential for regulatory and security demands.		
Convert Files to PDF	✓	✓
Select a file or files and convert them to one PDF file.		
Export Files to ZIP File	✓	✓
User Inbox	✓	✓
The Inbox is like the paper inbox on your desk. Scan a file to your Inbox. File it. Start a workflow process. Or move the file to another user's inbox.		

Feature	Treeno Document Server	Treeno Cloud SaaS
Document Management Functions (Continued)		
Batch Upload and Filing	✓	✓
Scan or upload a batch of files to Treeno for batch processing.		
E-forms	Optional	✓
Create electronic forms with Adobe. Fill in the information on the form and submit the form to Treeno.		
Outlook Integration	✓	✓
Upload emails directly from Outlook to Treeno.		
Word and Excel Check-in, Check-out	Optional	✓
Allows for documents to be sent to Treeno. Plug-in allows for automatic versioning check in of a checked out file.		
Secure Document Publishing Portal	✓	✓
Allows the authorized user to publish documents to a secure web portal for users outside of the organization to view and collaborate on the file(s).		
Document Delegation	✓	✓
Searching		
System Wide	✓	✓
Simply type in a word, phrase or number and Treeno searches all files, tabs, folders and sub-folder keyword metadata. Treeno quickly returns the prioritized results based on the closest match by folder, tab level, file level naming conventions and then by OCR text.		
Directory Level	✓	✓
The ability to search across the metadata fields specific for the Directory.		
File Name	✓	✓
Boolean Search	✓	✓
Complex searches are made easy with the advanced search capabilities in Treeno. Users can search from "begins with", "does not include", "contains", and many other useful search criteria. The Boolean search algorithm ensures users' find the exact information required.		
Integrated 'One Click' Search	Optional	Optional
When integrated with another application simply open to an application screen and click the 'Search' button on the TreenoConnect tool. The file linked to the application screen will appear on screen in Treeno.		
OCR – Text Search	Optional	✓
Treeno utilizes the Google supported Tesseract OCR engine on the server, which will allow a user to search for a file based on information within the document.		
Bookmark Searches	✓	✓

Feature	Treeno Document Server	Treeno Cloud SaaS
Upload Methods		
Print-to-Treeno	✓	✓
Using the Treeno Print function you can upload a file directly to Treeno		
Upload Button	✓	✓
File Name	✓	✓
Integrated 'One Click' Filing	Optional	✓
When integrated with another application simply open to an application screen and click the index button on the TreenoConnect. The file is linked to the application screen.		
Scan to Treeno Inbox	✓	✓
Use scanner software to scan paper documents to the Treeno Inbox. Files can be routed to other system users, filed or a workflow can be triggered.		
Send to Treeno	✓	✓
Right click on an electronic file and upload the file directly to Treeno.		
Barcode Routing	✓	✓
Use Treeno barcodes to scan documents directly to a user's inbox, cabinet indexing, to a folder, tab, and document type within a folder or trigger a workflow process.		
Drag and Drop	✓	✓
Drag and drop files, email and email attachments to Treeno with the Treeno Importer.		
Automated File Upload from Email	✓	✓
Automated File Upload from Fax	✓	✓
OCR Capture	Optional	Optional
Identify, process and file documents processed via ABBYY, Kofax, Digidocs, Scanflow Store, NSI, Captiva, and other capture software products.		
Scanner Hardware Independent	✓	✓
Treeno supports any manufacturer's scanner hardware.		
Usability		
Store Any File Type	✓	✓
Up to 250 Flexible Keyword Searchable Fields	✓	✓

Feature	Treeno Document Server	Treeno Cloud SaaS
Workflow		
Workflow Designer	Optional	✓
A graphical user interface tool that allows workflows to be created or enhanced.		
Workflow Email Notification	Optional	✓
Workflow Tasks	Optional	✓
Allows for prioritization of assigned items. Allows a user to define an action date and can filter and sort by priority, notes, date due, date notified, cabinet, folder, workflow, node name and note type.		
Searching Workflow Items	Optional	✓
Ad hoc Workflow	Optional	✓
Fixed Workflow	Optional	✓
Workflow Routing	Optional	✓
Workflow Reports	✓	✓
A detailed workflow history reports allows a user to create their own custom report. Pre-built report includes: Average time to process, total number of workflows processed, individual workflow report, work in progress report, folders without workflow report.		
Security and Compliance		
Secure Encrypted Connection	Optional	✓
Secure communication via a 128 Bit SSL encryption when viewing, uploading, administrating or sharing files via the Treeno Publishing Portal.		
System Audit Trail	✓	✓
Tracks access by user, date and time, IP address, information accessed and action performed..		
File Level Audit	✓	✓
All activity for a specific file is recorded and stored. With a drop-down report users can look up the history of any particular file. The detailed report tracks the file by who viewed and/or performed any action with the file and date and time. The report is available at the document level and allows organizations to comply with regulations such as FDA, 21 CFR, Part 11		
Compliance Report	Optional	Optional
Report allows a user to identify which document should be in a folder for the packet to be complete. Two separate reports can be generated. The first identifies completed filings while the missing document report will identify which folder is missing items and which documents are missing.		

Feature	Treeno Document Server	Treeno Cloud SaaS
Security and Compliance (Continued)		
View Only File Access	✓	✓
The Treeno Virtual Viewer enables the lock down of files to be "view only" access ensuring the security of sensitive information. The built-in viewer enables document types to be viewed by authorized users without requiring the application to reside on the user's desktop. This integrated viewer enables further security on exportability of files.		
2-Tiered Administration	✓	✓
3-Tiered Administration	✓	Not Available
Field Formatting Enforcement	✓	✓
User/Group/System Permissions	✓	✓
Manage security in Treeno in the following ways: • Department level – All rights (system, group, and user) are assigned by department. • System level – Set global permissions that apply to all groups within a department. • Group level – The most efficient way to manage security because you only need to set up security permissions once for multiple users.		
Deletion Recycling Bin	✓	✓
The administrator can define whether or not the user has rights to delete items, view deleted items or purge their deleted documents.		
Barcode Reconciliation	✓	✓
Reports on both barcodes that were printed and processed or are still waiting to be processed.		
Active Directory/LDAP Support	✓	Optional
Provides single sign on.		
Scalabilty		
One User to Thousands of Concurrent Users	✓	✓
Store Billions of Files	✓	✓
Treeno has the ability to store and manage billions of files. Treeno supports SAN and NAS to extend your system storage.		
Unlimited Filing Directories	✓	✓
SAN and NAS Support	✓	Not Available
Extend your storage with SAN and NAS.		

Feature	Treeno Document Server	Treeno Cloud SaaS
System Wide Functions		
Separate Databases	Optional	Optional
Completely separate data and files for increased security and compliance.		
Backup Function	✓	✓
System Usage Reports	✓	✓
Integration		
Integration with Third Party Applications	Optional	Optional
ODBC Integration	Optional	Optional
Active Directory/LDAP	✓	Not Available
Web Services API	Optional	Optional
The developer's toolkit allows the ability to interface Treeno Workflows with other systems, portals, applications, and websites.		
Client-Side Compatibility		
Firefox	✓	✓
IE 8	✓	✓
IE 9	✓	✓
Safari	✓	✓
Google Chrome	✓	✓
Windows XP	✓	✓
Windows 7	✓	✓
Mac OS X	✓	✓
Server-Side Compatibility		
Windows Server 2008	✓	✓
EMC Centera	✓	Not Available
SAN, NAS, DAS	✓	Not Available
Local RAID Storage	✓	Not Available
Plasmon Optical Storage	✓	Not Available
Microsoft SQL Server 2005 and 2008	✓	✓

About Treeno Software

Established in 2002, Treeno Software is a leader in the Enterprise Document Management (EDM) industry.Treeno Software was one of 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-based Enterprise Document Management (EDM) Software Solution.

Corporate Headquarters

951 Islington Street

Portsmouth, NH 03801

800-528-5005

TREENO
SOFTWARE