



White Paper

Treeno Third-Party Application Integration Overview

ABSTRACT

Treeno Software believes that document management without integration is only half the solution. And the solution needs to be integrated with your line of business software. Treeno's Legacy Integrator is designed to work out-of-the-box with Windows-based software. Treeno's Legacy Integrator is also used for integrating with green screen and web-based line-of- business applications, such as Salesforce.com.



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Introduction to Treeno Integration

Treeno Software believes that document management without integration is only half the solution. To be successful, a solution has to be well received by your end users and easy for IT to support. And it must impact your bottom line in a meaningful way. To make this happen, the solution needs to be integrated with your line-of-business software.

Treeno understands its role as the central repository for some of your most critical business assets – your documents. Document management, as a system, is designed to protect those assets. What is often overlooked, however, is that people also need to access that information. Every business situation is different, and you may find you need a variation of the easy, out-of-the-box, browser-based access that Treeno provides. Certain instances, for example, may require you to view documents from your intranet or your CRM application. Or your organization may have an electronic fax solution, which generates information you'd like to store in Treeno and automatically kick off a workflow to notify someone when it arrives. These types of solutions and many more are available with integration services provided by Treeno Software.

Integration Methodology

Treeno Software offers four primary integration points: Web Services, Legacy Integrator, customer-written or Treeno-written scripts, and File Monitor importing. Each integration component serves a different purpose; however, two or more may sometimes be combined to accomplish the overall goal of the integration task. For example, File Monitor could be used to automatically import documents into a user's inbox and several Web Services calls could be made to file the documents in a cabinet when a certain external action occurs.

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Here are some examples of how the different integration components can be used to accomplish a number of integration tasks:

Integration Component	Task
Web Services	<ul style="list-style-type: none"> • Populate folder values with metadata from a third-party application • Create document type metadata • Upload a file to a folder/document type • Download a file • Search within a cabinet
Custom Script	<ul style="list-style-type: none"> • File documents from an inbox to a cabinet, populate with values from a third-party application, and start a workflow based on a certain status field
File Monitor	<ul style="list-style-type: none"> • Import a large set of files and metadata from an outsourced scanning company • Route documents to a cabinet and kick off a workflow process
Legacy Integrator	<ul style="list-style-type: none"> • Auto-index documents from a line-of-business application • Drag-and-drop file and index any file or email

Types of Integration

Integration with Line-of-Business Applications

Integrating with line-of-business applications accounts for the majority of the integrations that take place with Treeno. With traditional client-server document management systems, this is typically a time-consuming process that involves coordinating with the line-of-business application vendor and the document management vendor. Additionally, APIs and SDKs are frequently needed to integrate the two products, requiring an extensive knowledge of both products and many hours of custom development.

Treeno has greatly simplified the process of integrating with line-of-business applications through the use of our Legacy Integrator product. This small .NET tool, which is installed on the end user's desktop, allows Treeno to

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identify the specific window in the line-of-business application that is currently open. With the click of a button, the documents, records, or transactions displayed in the open window are also displayed in Treeno.

For example, you are viewing the record for Acme Manufacturing in your CRM application. When you click the Search button in the Legacy Integrator, you are immediately brought to those documents in Treeno that are related to Acme Manufacturing. You are not required to log in to Treeno—the Legacy Integrator automatically does that for you using the appropriate rights and permissions.

The Legacy Integrator also allows you to link unprocessed documents in your Treeno inbox with the current window in your line-of-business application. All you have to do is click the Index button in the Legacy Integrator, and the work is done for you. This makes indexing the documents easier as the required metadata is pulled automatically from the line-of-business application.

Another feature of the Legacy Integrator is its drag-and-drop functionality. You can quickly add a local or network file—or even a Microsoft® Outlook® email—to Treeno by simply dragging and dropping it on to the Legacy Integrator. The Legacy Integrator uses the line-of-business application to auto-index the files or emails as you drop them on to the tool. Email information, such as the To, From, Subject, and Date lines are added to Treeno as possible search criteria. When you combine a CRM (or any line-of-business application) with Treeno's Legacy Integrator, the process of associating emails with customer or vendor information becomes much simpler. Emails that were once hidden away in user inboxes instantly become valuable business assets that are available to all the right people.

Windows-Based Applications

The Legacy Integrator is designed to work out-of-the-box with Windows-based software. Installed directly on your workstation, the Legacy Integrator supports most client-server applications and can read information from common user interface controls (text boxes, date fields, title bars, etc.). This interaction with the line-of-business application allows the Legacy Integrator to be “aware of” the current record that is being viewed in the window.

Some integration processes are designed to read only a unique value in the window and the remaining values are pulled from a database; however, this may not always be possible due to security restrictions and other reasons outside of your control. You could pull the unique value along with

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other important indexing values from the application window and then pass this information to Treeno. Without a database connection, however, there is a risk that the data can become out of sync. To address this challenge, Treeno offers two solutions:

- The record can be searched on using the unique record from the application (leaving the data unchanged in Treeno).
- The record can be updated with the information that has changed in the line-of-business application.

Practical examples of this are seen when documents are received throughout a shipping and purchasing transaction. Initially, some of the information is known, such as the purchase order number, but it isn't until much later in the process that the packing slip number or vendor invoice number is known. By updating the record on the fly, Treeno can maintain all relevant indexing information in Treeno, so it can always be searched on and referenced most accurately.

Green Screen Integration (AS/400)

Treeno can be integrated with legacy systems that are often referred to as "green screen" applications. These text-based applications are accessed using terminal emulator software that resides on end user workstations. The most common of these applications is IBM's AS/400 system, which is used frequently in banking, financial services, insurance, and the automotive industry. Treeno's integration is similar to that of client-server products; however, instead of relying on common user interface controls, such as text boxes, Treeno uses text coordinates to extract the information. Because of the way green screen applications are designed, similar data is always placed in the same location and is a fixed size. Using a configuration file within the Legacy Integrator, Treeno defines where the coordinates are for the unique indexing values being viewed in the green screen application.

Web Applications

Treeno's Legacy Integrator is also used for integrating with web-based line-of-business applications, such as Salesforce.com and Peoplesoft. These applications embed unique identifying information within the application itself. The index information is sometimes found in html tags, xml data, or title bars. Every application is different, but Treeno's common configuration set allows all of the features of the Legacy Integrator to be leveraged across applications. For some applications, such as Salesforce.com, Treeno is also able to pull additional indexing information from the product using Web Services. Because Treeno is able to securely and efficiently use data from your CRM application, users are not required to manually name the documents in order to index them.



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.

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