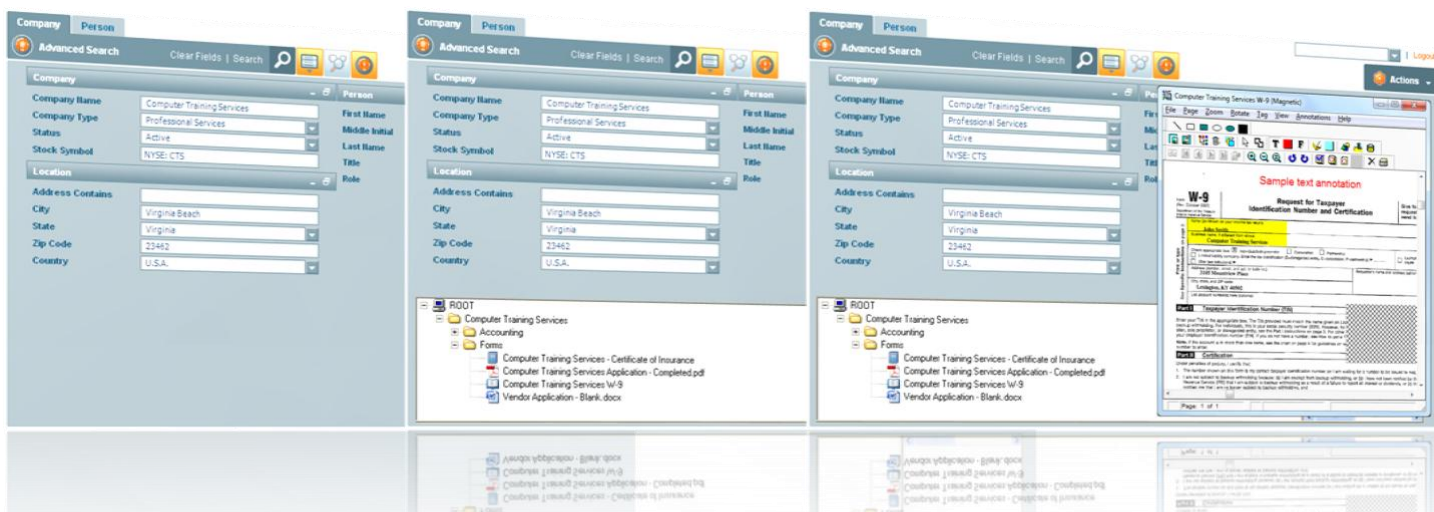


# Content-Enabled CRM Case Study



Transform your "data-centric" software application

into a "content-enabled" software solution

in less than a day using the Datahaven SDK for ECM.



**TORRENTIAL DATA**  
Bridging the Content and Data Divide

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Lash Group is one of the largest insurance reimbursement consulting firms in the United States, supporting pharmaceutical companies, biotech, and medical technology manufacturers and payers.

## **CHALLENGE**

To extend the functionality of Lash Group's internally-developed software application to manage the paper, faxes, and other unstructured data that accompany Lash Group's high-transaction environment.

With operations in North Carolina and California, Lash Group tracks payer activity for more than 15,000 public and private insurance plans and coordinates patient assistance and reimbursement issues with over 30,000 providers. To handle the wide range of structured data that drives its business, Lash Group had developed its own advanced, proprietary customer relationship management application. Despite its ability to manage structured information, the CRM system was limited in its ability to manage paper, faxes, and other unstructured data.

## **SOLUTION**

Using Datahaven, Torrential Data and Lash Group programmers extended the Lash Group CRM system to include imaging and workflow functionality and released the production version of the system in less than one month after the project began. In addition, Torrential Data staff assisted Lash Group in the integration of enterprise fax functionality with the system.

By integrating imaging, workflow, and enterprise fax functionality into Lash Group's CRM and enterprise fax applications, Torrential Data "content-enabled" Lash Group's business processes and eliminated the paper-driven inefficiencies in Lash Group's operations. Today, critical information moves effortlessly and intelligently through the Lash Group organization whether received in paper form and whether received at its East Coast or West Coast offices. Lash Group personnel now have immediate access to supporting documentation for each patient, including correspondence, patient applications, tax returns, and handwritten notes – all within the familiar context of the client's proprietary CRM application.

Don't just take our word for it. Powered by the Datahaven imaging and workflow functionality, Lash Group's CRM system has won awards for Best Use of Information Technology for Customer Service. Employees have cited its technology as a component of what makes Lash Group one of the best places to work because the software enables flexible work arrangements without sacrificing access to information.

Datahaven supports multiple, dynamic views of its cabinet interface and the content stored in its repository that can be driven by any type of control (e.g., tab, radio buttons, checkboxes, etc.). For example, this application displays the entire folder structure related to a patient under the Contact tab, but displays a folder structure limited to provider-related content when a user views the MD tab screen.

All views of the content stored in the Datahaven database are filtered, security-controlled windows into the much larger database containing all “unstructured” content and related metadata. Here, the Datahaven cabinet changes dynamically based on the patient record displayed by the CRM application. Also, Datahaven can display content from multiple originating systems and display this disparate content so that it appears to be “native” to this application. For example, Datahaven could display a copy of an invoice that originated in its content-enabled ERP system.

Datahaven’s Autofile function automatically and intelligently creates and manages this custom, database-driven folder structure, including the automatic naming of folders and files. This ensures that consistent data elements control the naming and filing of content and creates a consistent filing methodology, even over long periods of time. This also enhances the search functionality by allowing authorized users to “browse” or “climb the tree” to find related content in a parent or child folder.

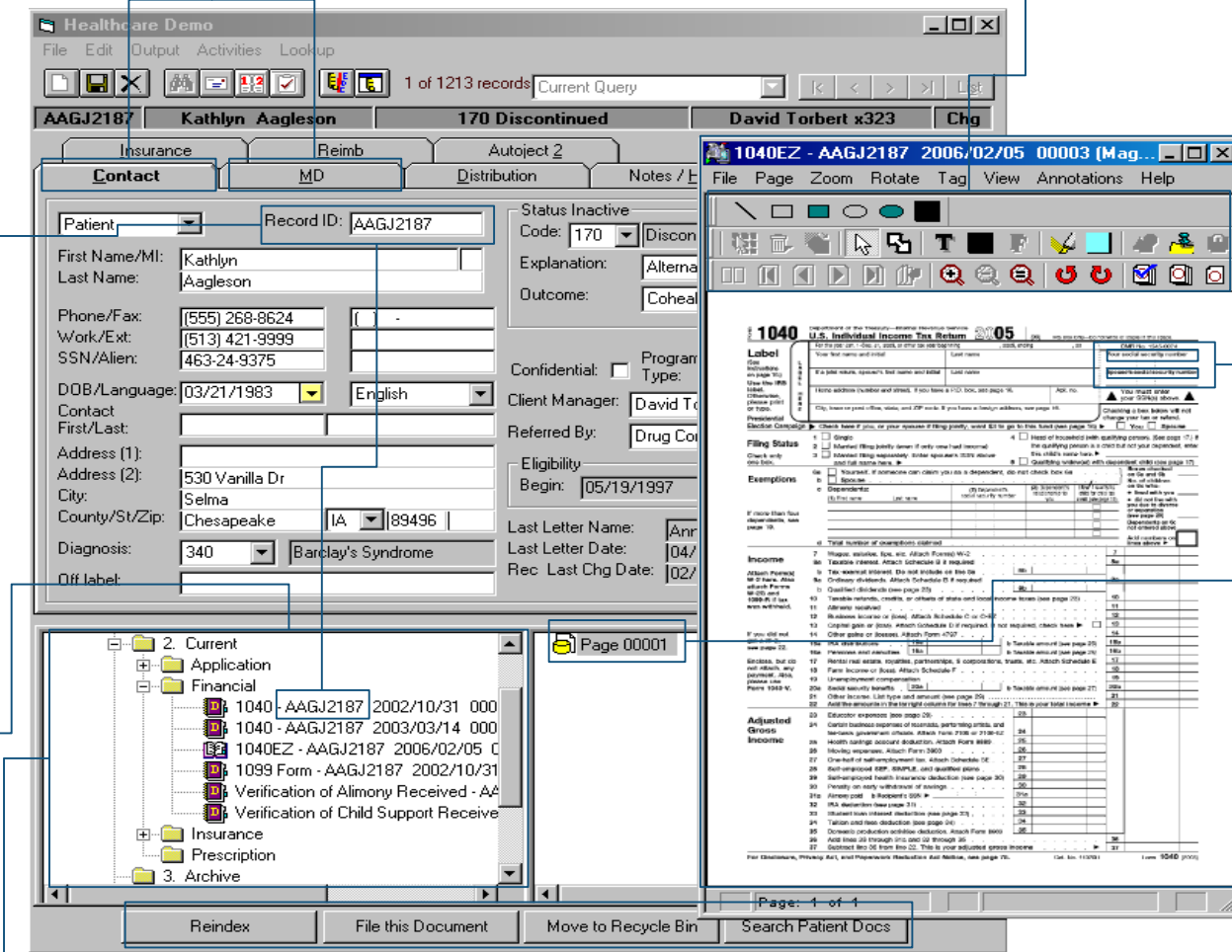
Navigation and other buttons can be turned on/off and displayed across the top or along the side of the document image viewer.

Page-level redactions allow for additional security to be applied to particular areas of a document.

The document/image viewer window can launch within a fixed window or sit atop other screens to maximize screen real estate. Datahaven manages and allows access to any file type. If Datahaven does not support the native viewing of a file type, it launches the application associated with the file type (MS Word for a .doc file) from the local machine.

Storage of document images at the page-level enables advanced functionality, including the ability to split, merge, and clone documents as well as add pages directly to an existing document. Typically, documents would be scanned, processed through a pre-defined workflow, and automatically named and filed using Datahaven’s Autofile function.

Custom buttons added to this application interact with the Datahaven Toolkit API to perform a wide range of actions related to a specific document or other content object.



Display the Datahaven “file cabinet” component in its own window or, as here, as a seamless window that is “bolted” to your application that users can hide and resize automatically with your application’s window. You also have flexibility in how the relevant content from the Datahaven repository is depicted in the Datahaven file cabinet: (1) the entire contents of the repository, (2) the contents of an individual folder or folder tree, and (3) an individual file, list of files, or workflow queue. The display of an individual file, for example, could be used to enforce the display of only the oldest file in a queue. Here we see an example of a “tree view” that displays the folders and their content as it relates to a particular patient. Note also that authorized users can perform other actions on the displayed content, including tagging multiple documents for print, fax, or export (including document assembly).

Torrential Data Solutions offers complete, tightly integrated, database-driven software development tools for ECM—enterprise content management—that corporate developers, systems integrators, and ISVs can embed directly within the UI of existing software applications. Our collection of SDKs, APIs, visual components, and other tools transform these data-centric applications into content-enabled solutions in as little as a day. From document imaging to email and fax integration, OCR data capture, workflow, and content publishing and distribution, Datahaven provides the means for these data-centric applications to natively capture, process, store, and manage the entire spectrum of content and related metadata from within its already-familiar user interface.



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