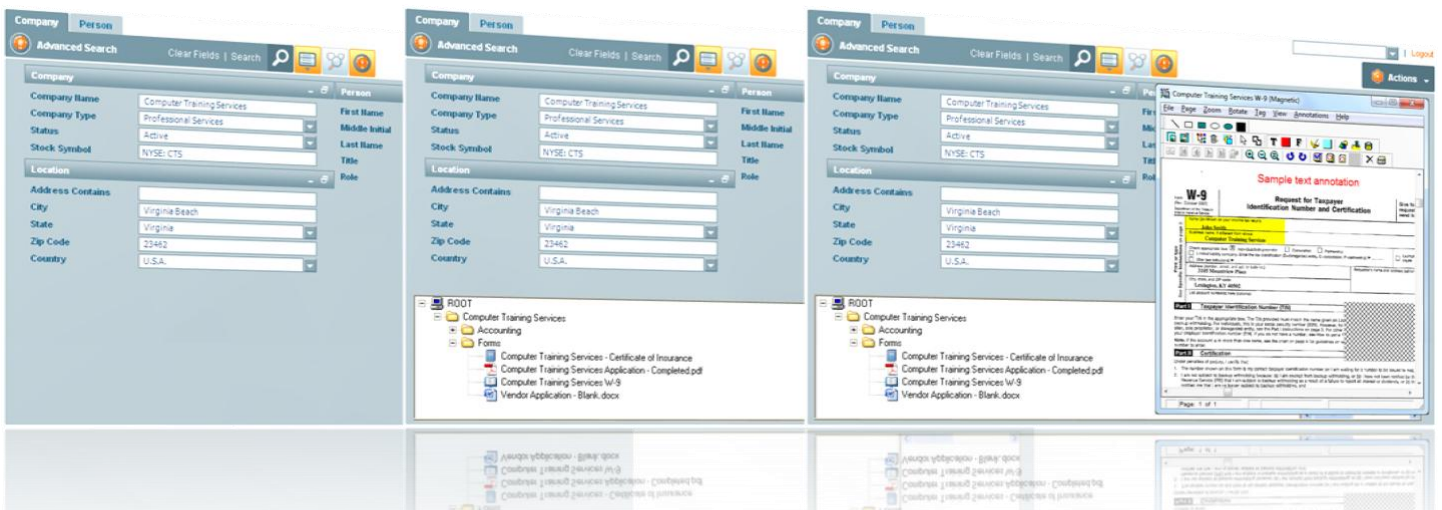


Content-Enabled ERP Case Study



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

5604A Virginia Beach Blvd., Suite 201, Virginia Beach, VA 23462
<http://www.torrentialdata.com> | 757.222.2000 | info@torrentialdata.com

©2010 Torrential Data Solutions, Inc. All Rights Reserved. Torrential Data, the "T" logo, Datahaven, and Bridging the Content and Data Divide are trademarks of Torrential Data Solutions, Inc. All other trademarks are the property of their respective owner.

Exel Transportation Services is a leading contract logistics, supply chain management, and freight management services company in the United States. Exel is a part of the Deutsche Post World Net group and is a sister company of DHL. With operations that directly or indirectly reach more than 75% of the world's companies, Exel provides third party, non-asset based transportation solutions for the supply chain market using a network of more than 70 independent brokerage offices.

CHALLENGE

In the late 1990s, Exel concluded that off-the-shelf ERP applications failed to address the complex accounting issues unique to its business. Exel, therefore, opted to create Delta VII, its own client-server ERP application. Although Exel would resolve its immediate accounting challenges with Delta VII, Exel understood that it had to address the rapidly growing volume of paper and other related content generated by the thousands of daily transactions managed by Delta VII and the rising headcount required to process this unstructured information. Exel turned to Torrential Data and its Datahaven SDK to content-enable Delta VII and to one of the Datahaven SDK Extensions for OCR to help automate the data entry process required by the tens of thousands of documents received each month.

SOLUTION

Using the Datahaven SDK, Delta VII automates certain data entry processes with barcode recognition functionality. In addition, Delta VII leverages the OCR extension to apply advanced, rules-based business logic to recognize the “fingerprint” of every invoice whether received in paper form or electronically via email, fax, EDI, or FTP. Once the integrated system recognizes the fingerprint of an existing vendor's invoice (or creates a fingerprint of a new vendor on-the-fly), the system further automates previously manual data entry tasks using advanced zonal OCR functionality that automatically extracts relevant data (e.g., invoice number, invoice date, invoice amount, etc.) from an invoice. If the automated recognition performed on a particular invoice does not meet a predetermined level of accuracy, then the system automatically routes the invoice to a human operator to verify the data and, if necessary, correct it. With the necessary indexing and other data entry tasks are completed, Delta VII users have direct, contextual access to perform a wide variety of workflow tasks on this content from any screen in Delta VII and can quickly view the content regardless of its file type. For example, users can take advantage of the page-level manipulation capabilities of the Datahaven SDK to add text and other annotations (e.g., security redactions of a particular area of a document containing sensitive information) to a document, approve invoices for payment, use manual or automated routing features to obtain additional approvals or clarifications, determine the workflow status of any content related to a transaction managed by

Delta VII and find other important content by browsing the database-driven folder structure that automatically names and stores the content. The fully integrated functionality of Exel's custom ERP application, the Datahaven SDK, and its OCR extension have combined to create a high volume, fully-integrated solution with advanced data capture functionality. The system has enabled Exel to reduce its administrative headcount and streamline its document cycle times to less than five days. Exel achieves this level of efficiency all-the-while processing—on a daily basis—more than 6,000 pages of carrier invoices and backup documentation such as bills of lading, proofs of delivery and other supporting documentation

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 vendor under the Profile tab, but displays a folder structure limited to payment-related content when a user views the Payments tab screen.

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

Datahaven supports recognition of numerous barcode formats to automate data entry and drive automated filing procedures with its Autofile technology.

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 vendor record displayed by the ERP 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 the signed work order from the customer that originated in its content-enabled CRM system.

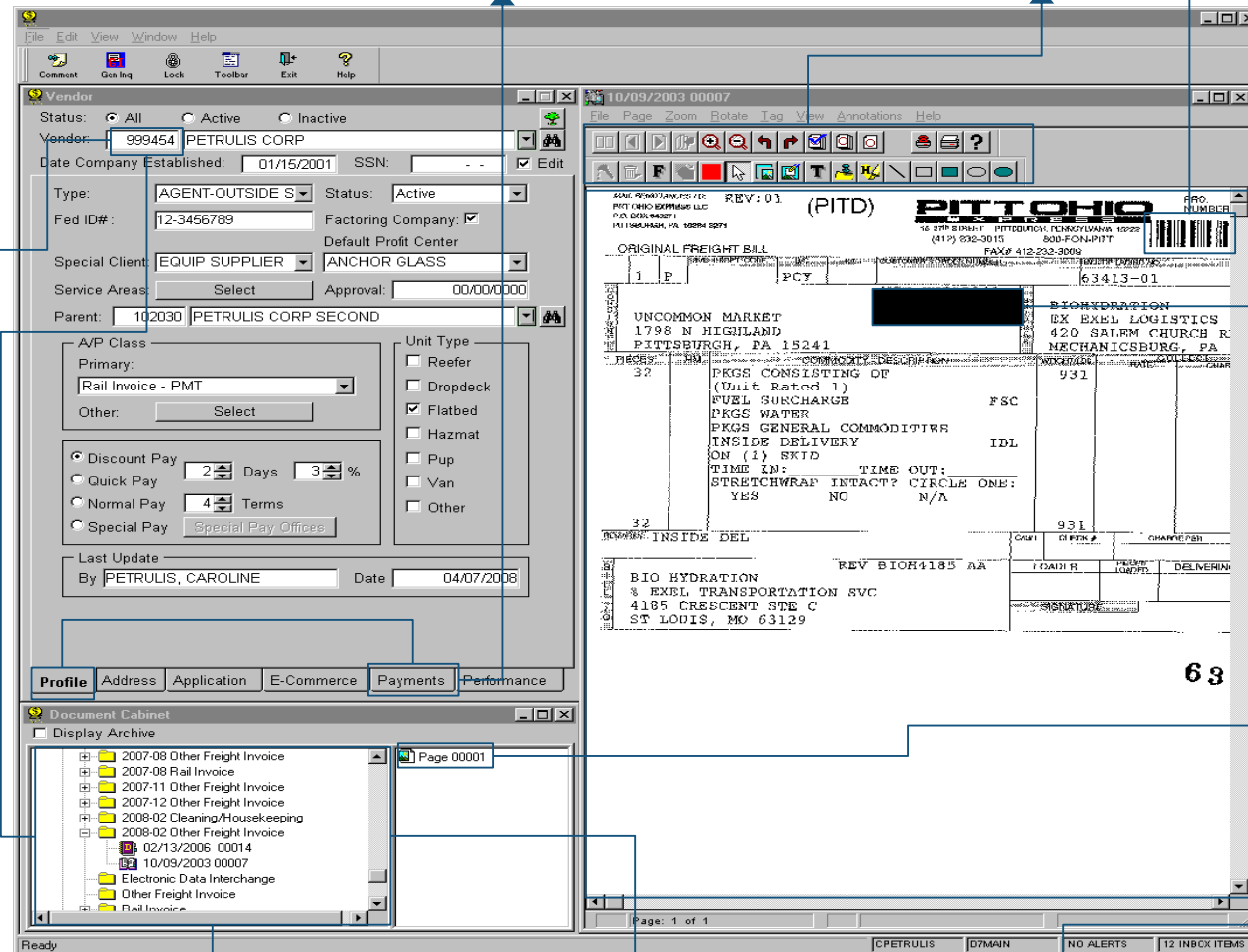
Page-level redactions allow for additional security to be applied to particular areas of a document.

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.

Datahaven's Autofile function automatically and intelligently creates and manages this custom, database-driven folder structure, including the automatic naming of folders and documents. 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.

Storage of document images at the page-level enables advanced functionality, including the ability to split, merge, and clone documents.

Display the workflow or other status of particular content stored in the Datahaven repository, including the number of items in a particular queue.



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 vendor. 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.



5604A Virginia Beach Blvd., Suite 201, Virginia Beach, VA 23462
<http://www.torrentialdata.com> | 757.222.2000 | info@torrentialdata.com

©2010 Torrential Data Solutions, Inc. All Rights Reserved. Torrential Data, the "T" logo, Datahaven, and Bridging the Content and Data Divide are trademarks of Torrential Data Solutions, Inc. All other trademarks are the property of their respective owner.