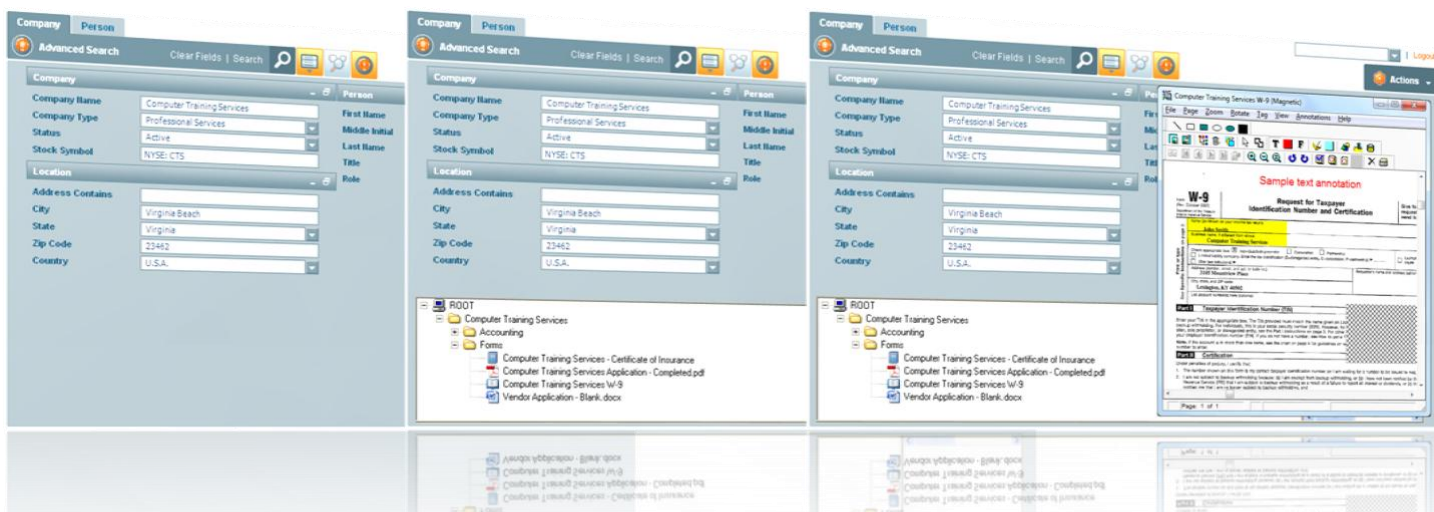


Content-Enabled Sales Proposal Management Application Case Study



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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This customer* is one of the largest distributors of plumbing supplies and pipes, valves, and fittings as well as one of the largest distributors of heating and cooling equipment in the United States.

CHALLENGE

With tens of thousands of employees in more than 1,000 service centers throughout the Western hemisphere, this company submits a plethora of written proposals that generate billions of dollars in annual sales. From the smallest to the largest project, this company must maintain accuracy and consistency in all of its submissions. This accuracy and consistency become all-the-more challenging considering that its submissions relate to product specification sheets with nearly 100,000 SKUs.

SOLUTION

By combining its proprietary sales management application with the Datahaven Toolkit, this company sought to facilitate the document assembly process required to generate sales-related submissions. With the Datahaven Toolkit, developers have full programmatic control over the entire document assembly process.

This company accomplishes its goal of creating accurate, consistent, and comprehensive sales-related submissions in two stages. The first stage employs the Datahaven Toolkit to capture and store all image content (regardless of file format) related to its product lineup and organizes all of these product images into a digital catalog. The second stage involves the actual document assembly process that relies on user selections and pre-defined business logic to build the contents of each submittal using the most current product specification sheets. The result is a custom submission package consisting of a unique combination of fixed and variable content.

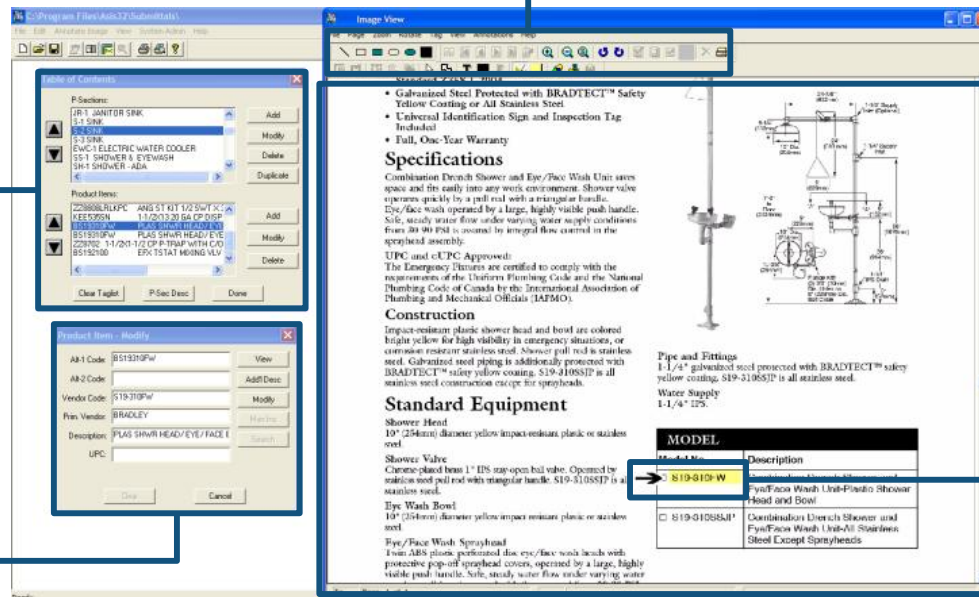
Fixed content include such elements as a submittal's cover page and trailing disclaimer page. Variable content include such elements as the body of the submittal that is generated based on user selections. Once the Datahaven Toolkit creates these elements, it dynamically formats the table of contents of the particular submission by taking an empty template and programmatically adding text annotations to name individual section headings and list their corresponding page numbers. Finally, the Datahaven Toolkit adds headers and footers to each page in the submittal to ensure consistent use of this company's branding. This company then has the option to print, fax, email, or export the resulting package for submission.

Using the Datahaven Toolkit, this company has created an efficient and consistent tool to format its sales-related submissions and enforces automated control over an otherwise manually-intensive and error-prone process.

* The company has requested that we withhold its identity

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

Updated content for the field office application is periodically updated and distributed along with a subset of the Datahaven SDK runtime. The field office application allows for sophisticated creation of proposal packages using the latest content from the corporate library of product specifications and its related metadata.

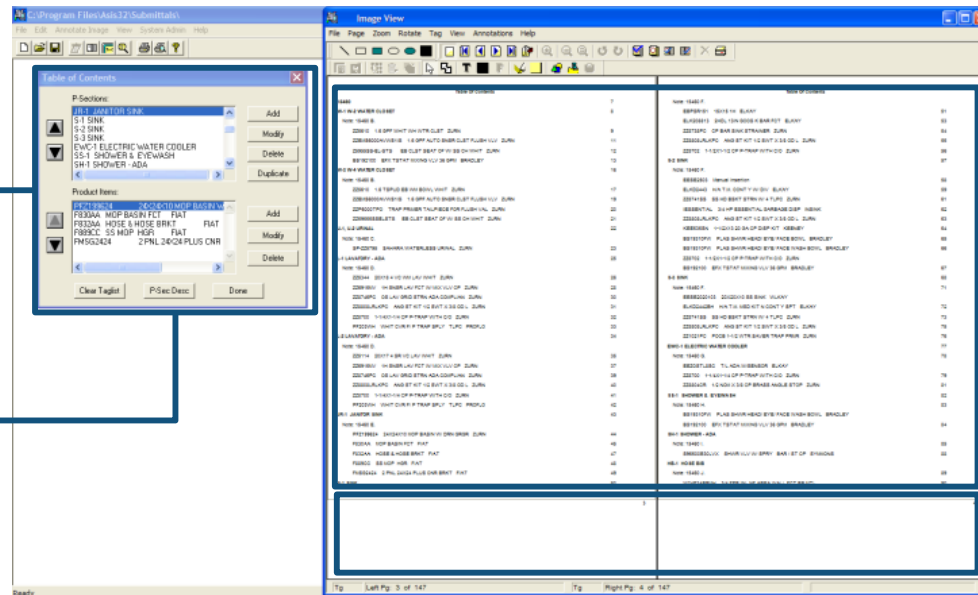


In this integration, the Datahaven SDK operates largely behind the scenes except for the viewer control. All fields and actions are a combination of the proposal management application and the Datahaven SDK. For example, developers have full programmatic control over the viewer, the ability to add annotations, and the ability to manage output (e.g., printing and exporting). 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.

Users add required annotations to each image as needed. All annotations and images are included in the outbound package, which can be printed, faxed, emailed, or exported to a file. Users can also create manual page inserts.

Datahaven provides security-controlled options for users to add and modify annotations, redactions, page inserts, etc) and gives developers full programmatic control over displaying the viewer, closing the viewer, managing output (e.g., printing, email, and export), and managing annotations. Datahaven saves annotations as a separate layer to avoid modifying the content in the repository, but burns annotations into the document images as part of any outbound process, including the archival of official versions of the documents generated by the system.

The field office application applies certain fixed content elements (e.g., a cover page and trailing disclaimer page) and pre-defined business logic to the user-defined content elements (e.g., the products themselves) to assemble a custom sales proposal that is populated using the most current product specification information stored in the Datahaven repository.



The table of contents is dynamically formatted by taking a template image, in this case a blank page, and programmatically adding text annotations (driven by user selections) to the pages to name individual section headings and line items and list their corresponding page numbers.

The cover page and trailing disclaimer page are fixed content, while all the content for the body of the submittal are formatted based on user selections, including headers and footers that are added to each page in the submittal.

Datahaven adds footers to each page in the submittal to ensure consistent use of company branding (redacted here at our customer's request). The end result is a quick and consistent way to format documents and provide control over, and consistent corporate branding to, an otherwise manual, ad-hoc process.

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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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