

## Datahaven Web Toolkit: Sample Integration with Salesforce.com

This sample integrated solution illustrates the Datahaven Web Toolkit which was used to content-enable the popular web-based CRM application, salesforce.com. The integration allows users to maintain highly-sensitive (and storage-intensive) corporate content on-site so that they can maximize content security while eliminating the extra license fees associated with storing this content remotely on salesforce servers.

**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.

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

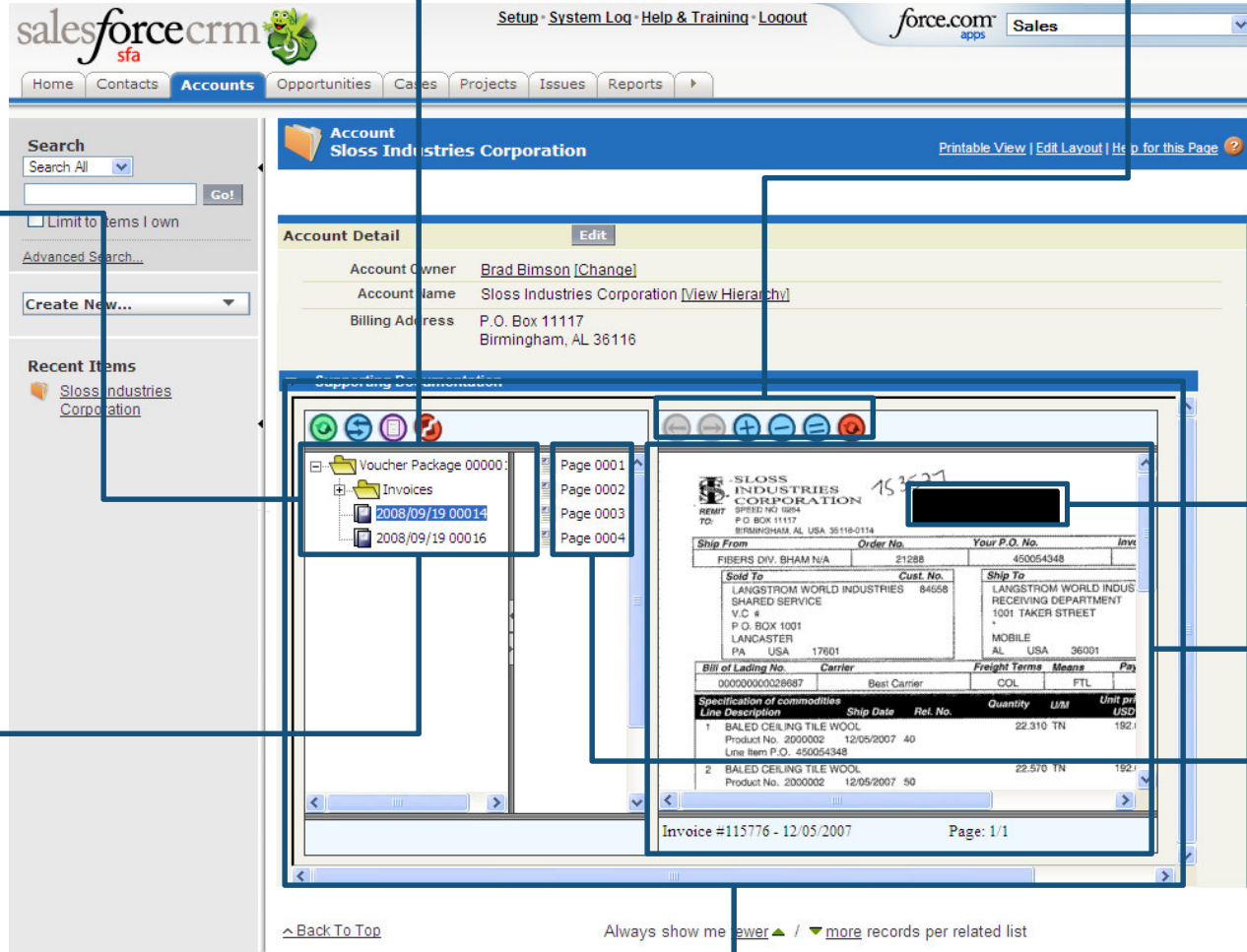
**All views of the content stored in the Datahaven database are filtered, security-controlled windows into the much larger database containing all “unstructured” content and related metadata.** Here, the Datahaven cabinet changes dynamically based on the vendor record displayed by salesforce. Also, Datahaven can display content from multiple originating systems and display this disparate content so that it appears to be “native” to this application.

**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.

**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 allow for faster retrieval times for large documents.



**Display the Datahaven “file cabinet” and viewer components either in an IFRAME that you can allow users to collapse or in their own popup 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.