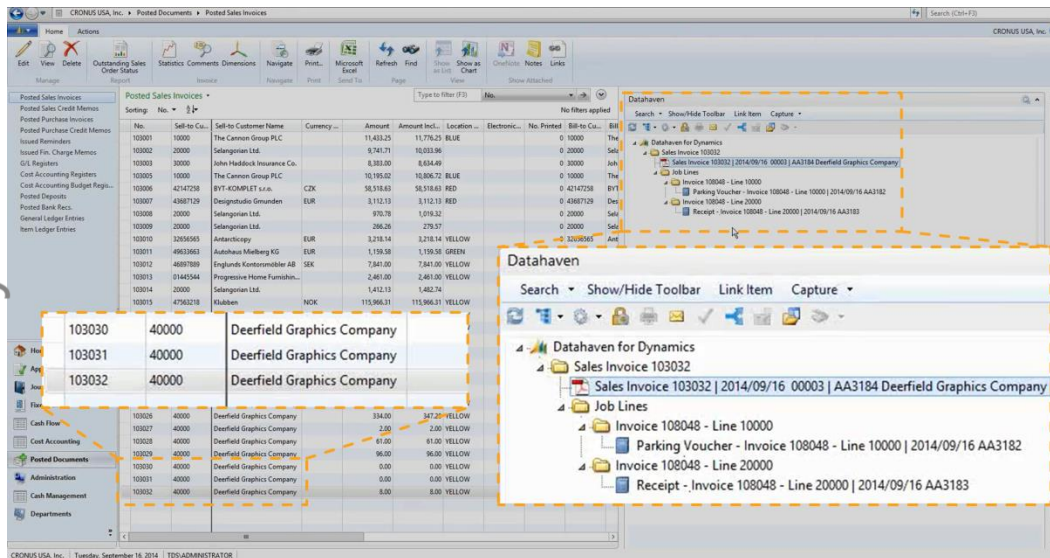


Embedded, High Performance Scanning, OCR, and Workflow for the Microsoft Dynamics and Microsoft Outlook Platforms

The Datahaven for Dynamics solutions provide any size organization with a robust, cost-effective archive storage and retrieval solution that automates naming and filing protocols and displays security-controlled, context-sensitive folder and list views of documents, email, and other electronic files related to any Microsoft Dynamics records. With search and workflow functionality embedded directly within the familiar interfaces of Microsoft Dynamics and Microsoft Outlook, Datahaven for Dynamics also offers enterprise-class features for organizations with more complexity and higher volume, including

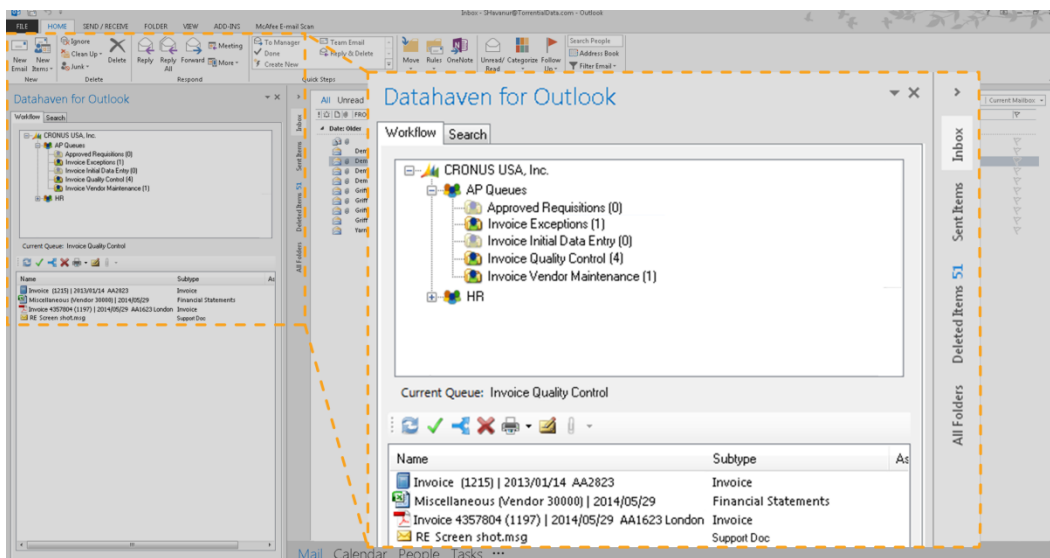
- high speed batch scanning
- high volume OCR data extraction
- document-centric workflow
- granular security model and audit trail

Microsoft
Dynamics



Datahaven for Dynamics — shown here embedded on the posted sales invoices page — provides context-sensitive folder and list views of one or more documents, emails, or other files related to any Dynamics record.

Outlook



Datahaven for Dynamics— shown here embedded within Microsoft Outlook — provides Dynamics and non-Dynamics users with instant access to, and the ability to route and approve any document, email or other electronic file related to a Dynamics record.

Functional Overview of Core Editions and Extensions (and available user interface(s))	Archive Essentials	Workflow Professional	Extensions
Content Capture			
Drag-and-drop files from a network file share or local hard drive and submit to a document-centric workflow queue managed by Datahaven (W)	✓	✓	SSE
Manually import files from a network file share, local hard drive directly into the Datahaven folder structure associated with a Dynamics record (W)	✓	✓	–
Drag-and-drop emails and email attachments from Outlook or files from a network file share or local hard drive directly into the Datahaven folder structure associated with a Dynamics record (W)	✓	✓	–
Ad hoc or batch scanning directly into the Datahaven folder structure associated with a Dynamics record (W)	–	–	ASE
Batch scanning directly into a document-centric workflow queue managed by Datahaven (W)	–	–	WSE
Scanning with digital copiers directly into a document-centric workflow queue managed by Datahaven (N/A)	–	–	IME
Automated inbound fax integration directly into a document-centric workflow queue managed by Datahaven (N/A)	–	–	IME
Inbound email integration from one or more monitored email addresses directly into document-centric workflow queues managed by Datahaven (N/A)	–	–	IME
Data Entry			
Enter or modify data from directly within an existing Dynamics record that is displayed side-by-side with its source document, email, or other electronic file (W)	✓	✓	–
Create a new Dynamics record by entering data directly into a new Dynamics record that is displayed side-by-side with its source document, email, or other electronic file (W)	–	✓	–
Data entry from within the Outlook interface (e.g., general ledger coding of vendor invoices) (O)	–	✓	WE
Barcode recognition to split documents and programmatically file documents based on barcode data values (N/A)	–	–	ASE
Barcode recognition to programmatically file and route documents based on barcode data values (N/A)	–	WSE	WSE
OCR/OMR/ICR rules engine that classifies and recognizes structured and variable document forms and extracts, validates, and inserts the extracted data into a newly-created, or matches to an existing, Dynamics record (N/A)	–	OCR	OCR
Verify output of OCR rules engine and, with accounts payable extension (OCR-AP), automate matching and reconciliation with PO total or PO line details and invoice coding with non-PO summary lines or non-PO detail lines (OCR)	–	OCR	OCR
Naming / Filing / Storage			
Automated naming, filing, and storage based on document metadata (e.g., scan date, document subtype) and real-time Dynamics data even when the Dynamics table changes (e.g., posting a PO creates a posted purchase invoice record and deletes the PO record) (N/A)	✓	✓	✓
Store any file type (e.g., TIFF, PDF, DOC, XLS, etc.) (N/A)	✓	✓	✓
Support for multiple storage media (e.g., SAN, NAS, etc.) (N/A)	✓	✓	✓
Search / Retrieve / View			
Dynamic, configurable folder views from directly within list, card, journal, ledger, and register records in Dynamics based on document metadata and transactional relationships at the header and line level (W)	✓	✓	–
View document images (includes zoom, rotate, etc.) and document annotations as well as emails and other electronic files (e.g., Microsoft Word and Microsoft Excel files) related to a Dynamics record (W,O,M)	✓	✓	SSE
Multi-user document/file locking (N/A)	✓	✓	SSE
Search for documents, email, and other electronic files related to Dynamics records using the Datahaven File ID, File Name, or File Description (W,M)	✓	✓	SSE
Use Dynamics data to search for documents, email, and other electronic files related to records managed by Dynamics (W)	–	✓	SSE

Functional Overview of Core Editions and Extensions (and available user interface(s) (cont'd))	Archive Essentials	Workflow Professional	Extensions
Document-Centric Workflow			
Add notes and annotations (text and graphic) to document images and PDF files that are related to a Dynamics record (W,O)	✓	✓	SSE
Split a multi-page document or PDF file into multiple pages or merge multiple pages into a single document (W)	–	✓	–
User-driven workflow routing and approval of documents, email, and other electronic files through a document-centric workflow process (W,O,M)	–	✓	WE
Automated business rules that route and approve documents, email, and other electronic files through a document-centric workflow process (e.g., requiring a second level of approval when the amount of an invoice exceeds a pre-defined amount) (N/A)	–	✓	WE
Enforce conditional business rules that are a combination of document-centric rules and native Dynamics functionality (e.g., block the release of a new vendor record until all of vendor's tax forms have been received) (N/A)	–	✓	WE
Enhance native Dynamics workflow by displaying relevant Datahaven documents, email, and other electronic files side-by-side on the approval request and approval entries screens (W)	–	✓	WE
Automated email notifications to alert users of document workflow statuses (O)	–	✓	WE
Archiving, Output & Distribution			
User-driven archiving of Dynamics reports (e.g., purchase orders and sales invoices) and storage as PDF files in Datahaven (W)	✓	✓	–
Automated archiving of Dynamics reports (e.g., purchase orders and sales invoices) as PDF files and batch distribution via fax, email, etc. (N/A)	–	✓	–
User-driven outbound email distribution (W,O)	✓	✓	SSE
Mark documents and individual pages for printing, faxing, and emailing with an option to merge multiple document images into a single PDF file (W)	✓	✓	SSE
User-driven outbound fax distribution (W)	✓	✓	–
Automated outbound fax distribution , including capture of the faxed document and its related metadata into the Datahaven repository (N/A)	–	✓	–
Security, Auditing & Compliance			
Configurable security for workflow queues, folders, documents, users, and groups mapped to Active Directory groups or to Datahaven's native security management tool (N/A)	✓	✓	SSE
View detailed audit trail of files associated with a Dynamics record (W)	✓	✓	SSE
Add security redactions to document images and PDF files related to a Dynamics record (W)	✓	✓	SSE

✓ Included with edition/extension.

– Not available with, or not applicable to, this edition/extension.

Inbound Manager Extension (IME).

The Workflow Scanning Extension (WSE) includes Archive Scanning Extension (ASE) functionality.

Workflow Extensions (WE) include Search & Submit Extensions (SSE) functionality.

Archive Essentials includes a license for the Search & Submit Extensions.

Workflow Professional includes a license for Workflow Extensions.

The Search & Submit Extensions and the Workflow Extensions also may be purchased separately for use by non-Dynamics users (Note: Microsoft may require the purchase of a "limited" or "light" user license for these non-Dynamics users).

Available Datahaven for Dynamics user interfaces are Windows (W), mobile (M), Outlook (O), and OCR verification (OCR).

Overview of Datahaven Editions and Extensions

Archive Essentials Core Edition (Dynamics users)

Archive Essentials is intended for “full” or “limited” Microsoft Dynamics users whose document management needs focus primarily on the need to archive, search, and view documents, email, and other electronic files related to existing Dynamics records. Scanning documents directly to pre-existing records is available as an add-on using the **Archive Scanning Extension**. The ability to capture documents, email, and other electronic files to existing Microsoft Dynamics records via import and drag-and-drop is included with an **Archive Essentials** license.

Workflow Professional Core Edition (Dynamics users)

Workflow Professional is intended for Microsoft Dynamics users whose document management needs extend to creating new Dynamics records from a captured document (e.g., creating a new Dynamics purchase quote record from an email received from a vendor) as well as routing, approving, and handling exceptions related to these and other document-centric processes (e.g., requiring manager approval before making a purchase quote into a purchase order). **Workflow Professional** includes all **Archive Essentials** functionality and is powered by a fully-configurable workflow engine that enables business processes to be driven by specific user actions (e.g., posting a purchase order to a purchase invoice) and by automated business logic (e.g., routing a purchase invoice that exceeds a configurable threshold allowance above its corresponding purchase order amount to require additional approvals).

Limited User Purchasing Edition (Dynamics users)

The **Limited User Purchasing Edition** is intended for Microsoft Dynamics users that require **Workflow Professional** functionality, but only within the purchasing function of Microsoft Dynamics. For these users, the **Limited User Purchasing Edition** includes all **Archive Essentials** functionality.

Search & Submit Extensions (non-Dynamics users)

The **Search & Submit Extensions** are intended primarily for internal, non-Dynamics users who need to search and view Dynamics-related documents from a mobile device or from directly within the Outlook interface. The **Search & Submit Extensions** also enable non-Dynamics users to submit documents—from a mobile device or from directly within the Outlook interface—to Datahaven workflow queues for indexing to new Dynamics records by **Workflow Professional** users and for routing, approval, and exception handling by **Workflow Professional** users, **Limited User Purchasing** users, or **Workflow Extensions** users. The Search & Submit Extensions are included with an **Archive Essentials** license.

Workflow Extensions (non-Dynamics users)

The **Workflow Extensions** are intended primarily for internal, non-Dynamics users who need to route, approve, and handle exceptions from a mobile device or from directly within the Outlook interface. The **Workflow Extensions** also enable non-Dynamics users to use the Outlook interface to enter or modify Dynamics-related data (e.g., general ledger codes) related to documents. The **Workflow Extensions** are included with a **Workflow Professional** license.

Document Capture Extensions (copiers, scanners, etc.)

The ability to capture documents, email, and other electronic files via import and drag-and-drop is included with **Archive Essentials** and **Workflow Professional**. The **Workflow Scanning Extension** supports barcode recognition and enables the use of desktop and production-level scanners to scan document batches into a Datahaven workflow queue for those environments with higher inbound document volumes than is recommended for copier-based scanning hardware. The **Archive Scanning Extension** enables users to scan a document directly into the Datahaven folder structure associated with an existing Dynamics record. With the **Inbound Manager Extension**, Datahaven can capture documents scanned via copiers and other peripheral devices and capture electronic documents saved to a network folder or received via Exchange/Outlook, FTP site, etc.

Data Capture Extensions (data entry users)

Intended for Microsoft Dynamics customers with higher inbound document volume, the **Baseline Extension for Automated Data Capture** uses OCR, ICR, and OMR data capture technologies to automatically extract data from any kind of document and enables data entry personnel (who need not have a Microsoft Dynamics license) to “verify” and/or correct the extracted data without the use of IT-administered templates. Datahaven uses Microsoft Dynamics web services to create the applicable Microsoft Dynamics record, insert the verified data, and link the document and the Microsoft Dynamics record. For the additional complexities and variables related to processing vendor invoices (e.g., line item capture, purchase order line reconciliation, three-way matching), the **Payables Extension for Automated Data Capture** further extends the **Baseline Extension for Automated Data Capture** for the specific needs of an accounts payable department. In a typical accounts payable implementation, a customer would need one (data verification) user license for invoice volumes of up to 750-1,000 documents per day.



Datahaven™ for Dynamics is a Torrential Data™ solution

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