

# THEREFORE™ PRODUCT BROCHURE

PEOPLE | PROCESS | INFORMATION

SMART CHANGE STARTS HERE.

 CANON SEE IMPOSSIBLE

# WHY THEREFORE™

## YOUR CHALLENGES



### EFFICIENCY

Difficulty accessing correct information; slow, chaotic processes.



### SECURITY

Preventing unauthorized access; data backup; disaster recovery.



### COMPLIANCE

Information retention for legal purposes; confidentiality.



### COST EFFECTIVENESS

High physical storage costs; time and labor-intensive processes.

Staying ahead in a competitive marketplace requires efficient processes and the ability to use information as a strategic asset. With Therefore™ you'll gain:



### PRODUCTIVITY

Recoup the time you lose searching for information and chaotic processes.



### SECURITY

Keep your information safe, secure and confidential.



### REACTIVITY

React to your customers' needs in a timely, professional manner.



### FLEXIBILITY

Access your information anytime, anywhere. Easily upgrade and expand.



### VISIBILITY

Maintain a clear overview of your processes, track business-critical metrics.

Protect yourself from data security breaches, gain visibility into your operations, and boost productivity through flexible and intuitive information management!

## WITH THEREFORE™

### FLEXIBLE.

On-premise or in the cloud;  
for single-department to  
multi-site deployments.

### INTUITIVE.

Users quickly and easily learn  
how to use the system.

### SCALABLE.

Start simple and add more  
as your business grows.



### SECURE

data within a central,  
digital repository.



### CAPTURE

and utilize paper and  
electronic information.



### MANAGE

information as a  
strategic asset.



### ACCESS

your data anytime,  
anywhere.



### AUTOMATE

and optimize core  
business processes.



### ANALYZE

and react to key  
performance indicators.

# CAPTURE

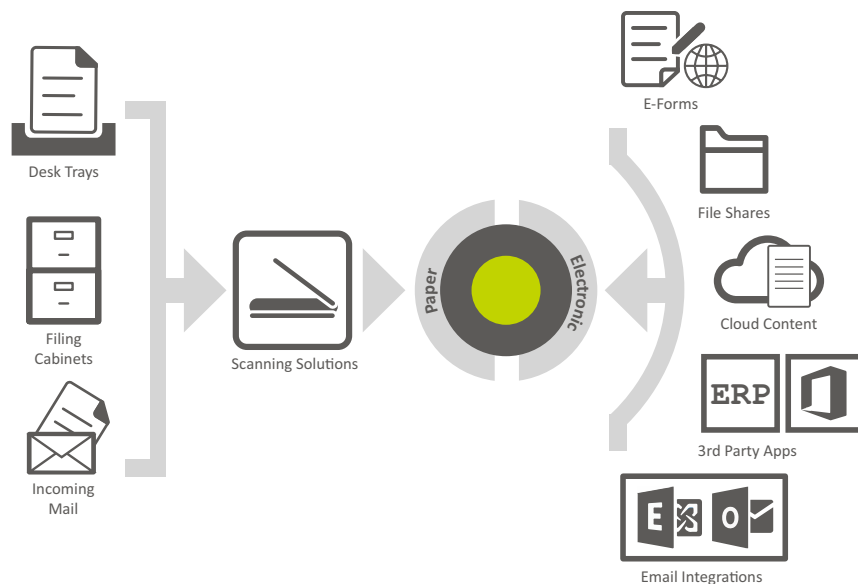
## CAPTURE AND UTILIZE YOUR INFORMATION

Leverage your business information, regardless of its format.

- **Electronic documents** – Efficiently import electronic information with simple manual or streamlined automatic importing options. Integrations allow seamless saving directly from third party software, including Microsoft® Office. The Microsoft® Exchange connector automatically secures and centralizes strategic email communications.
- **Paper documents** – Scan and index directly from scanning devices. Automatically classify and extract data with advanced scanning solutions.

## FEATURE FOCUS: THEREFORE™ E-FORMS

Quickly and intuitively capture data with Therefore™ E-Forms. Forms are easily designed and customized, and can be used either internally or on an external website. Forms can adapt dynamically to responses and be embedded on a website or customer portal. Forms make employee vacation requests, customer satisfaction surveys, and many other processes faster, smarter, and more reliable.





# SECURE

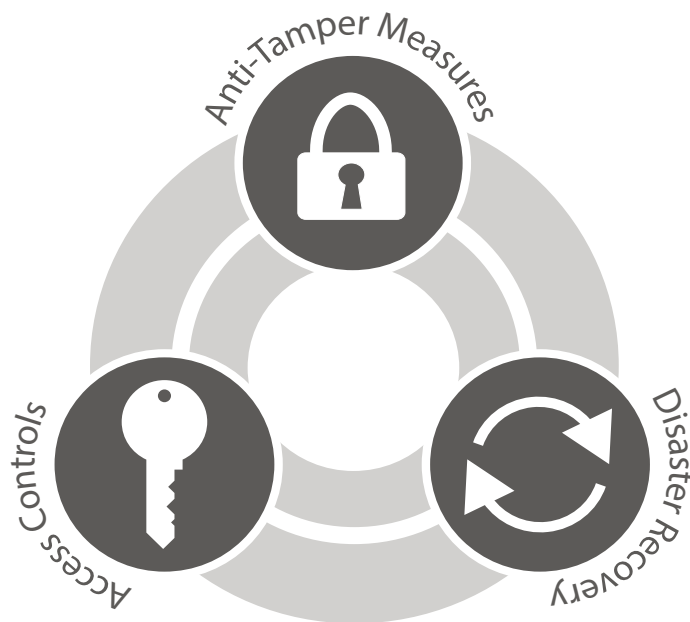
## A SECURE, DIGITAL REPOSITORY

Privacy by default. Privacy by design.

- **Access controls and permissions** – Only authorized users can access the system. Permissions on content can easily be defined for individual users or user groups.
- **Anti-tamper measures** – The system verifies the authenticity of documents each time they are retrieved.
- **Disaster recovery** – Automatic backup storage ensures your data can be recovered in case of drive failure.

## THEREFORE™ ENABLES GDPR COMPLIANCE

Therefore™ has been audited by independent third party experts who attest that Therefore™ enables clients to comply with the data protection requirements for software solutions as per the EU Data Protection Regulation (EU GDPR).\*



# MANAGE

## LEVERAGING INFORMATION AS A STRATEGIC ASSET

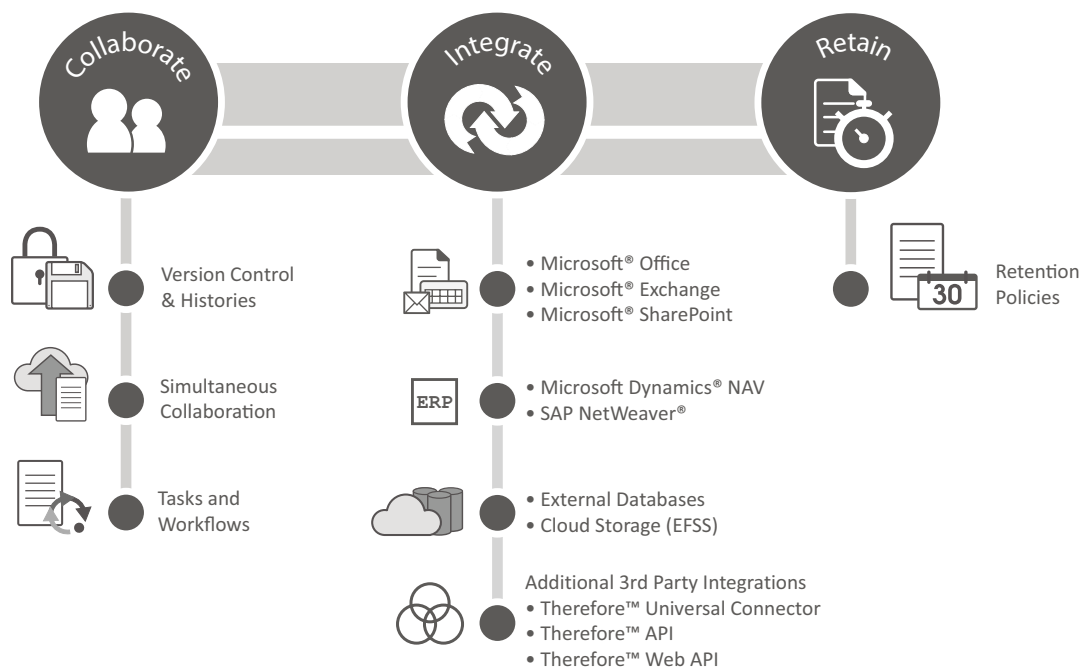
Update, refresh, and manage information effectively across all areas of your business.

- **Collaborate** – Work simultaneously on documents with internal or external personnel. Easily track changes, assign tasks, and process information with workflows.
- **Integrate** – Seamlessly integrate with any third party software, leveraging native integrations, the Therefore™ Universal Connector, or the Therefore™ API.
- **Retain** – Comply with legal and regulatory requirements regarding confidentiality and document retention.

## FEATURE FOCUS: THEREFORE™ CASE MANAGEMENT

Organize and manage related documents logically and intuitively! With Case Management, you can:

- Group interrelated documents for better visibility and faster retrieval.
- Open/close cases, link them to workflows, and utilize retention policies for lifecycle management.



# ACCESS

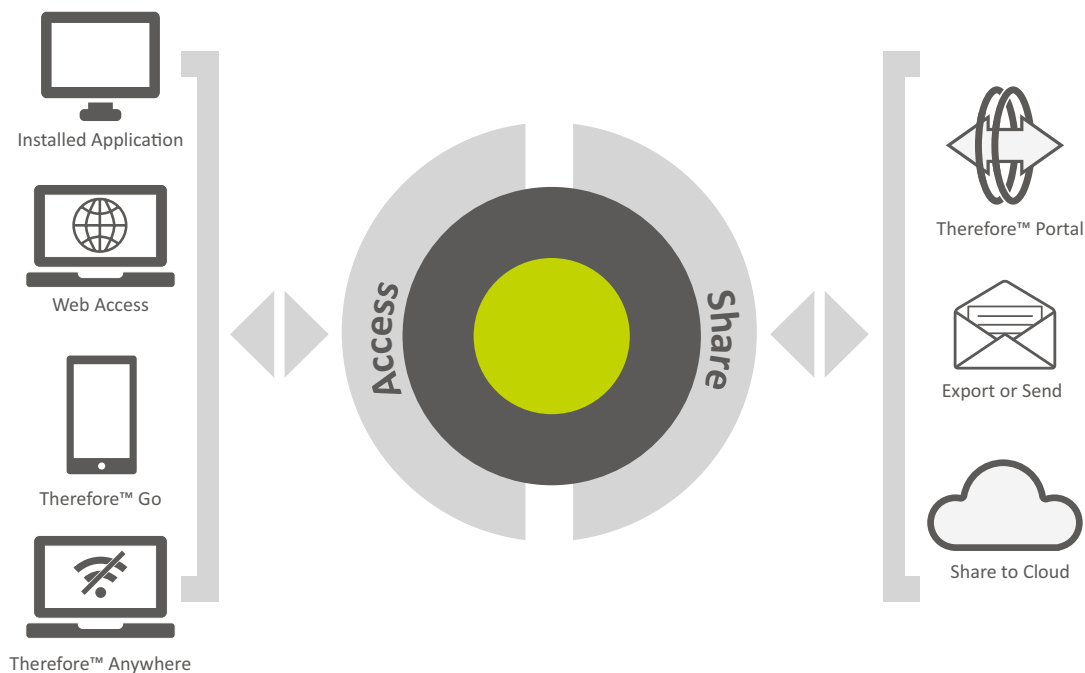
## ACCESS YOUR INFORMATION ANYTIME, ANYWHERE

Information that moves with you!

- **Search** – Find based on a document's metadata or its contents, regardless of where it's saved in the system.
- **Access** – Access your information in the office, on the web, or with Therefore™ Go. Therefore™ Anywhere allows you to edit documents offline and re-synchronize them later.
- **Share** – Easily share information with those inside or outside of your organization. It's simple to export, email, or share information from Therefore™!

## FEATURE FOCUS: THEREFORE™ PORTAL

An efficient and secure way to share and receive information directly with external parties. Embed the Portal into your website and customize it to fit to the look and feel of your company. External parties can sign on with secure login credentials and will only be able to view or upload documents that pertain to them.

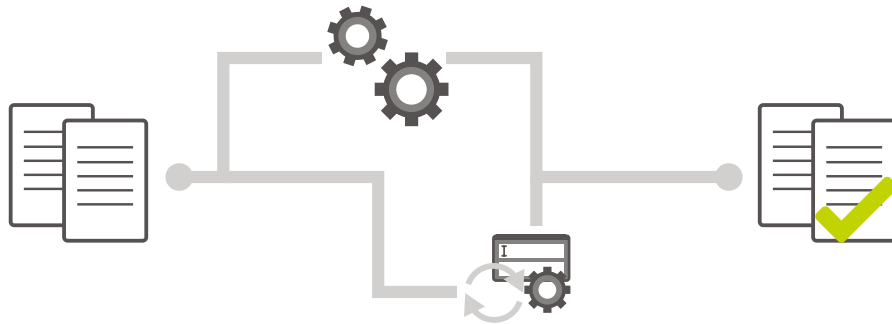


# AUTOMATE

## STREAMLINE CORE BUSINESS PROCESSES

Gain greater efficiency, visibility, and consistency.

- **Therefore™ Workflow** – Therefore™ automates core business processes with its powerful workflow engine. Multiple people can work simultaneously on a process, and the system automates many tasks in the background. Ensure that you never miss a deadline again!
- **Therefore™ Content Connector** – The Content Connector continually saves and indexes information from watched folders, email boxes, digital signature providers, or cloud storage accounts. Automate the flow of information coming into your company!





# ANALYZE

## ANALYZE AND REACT TO KEY PERFORMANCE INDICATORS

Stay on top of the metrics most valuable to you!

- **Report** – Schedule reports to be automatically delivered at regular intervals. Gain visibility and make insight-driven decisions.
- **Track** – Take advantage of audit trails on document and user actions for compliance with privacy and security regulations.
- **React** – Bring your data to life with dynamic, real-time dashboards. Immediately react to changes in performance indicators.



# HOW THEREFORE™ HELPS

## STREAMLINE CORE BUSINESS PROCESSES



### HUMAN RESOURCES

Streamline recruiting, onboarding, and off-boarding processes; manage leave requests; keep employee records secure, confidential, and easy to retrieve.



### CUSTOMER SERVICE

Easily group customer documents into digital binders; ensure the most current information is easily retrievable; inform customers instantly on the status of their orders or requests.



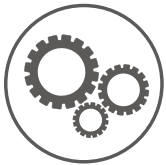
### FINANCE

Optimize invoice processing with workflows and automatic linking; track approvals and payment records; automate payroll and integrate with existing ERP software.



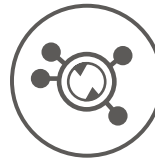
### LOGISTICS

Digitize the approval of invoices, credit notes, and hauler payments; streamline customer invoicing and transport documentation; maintain a complete audit trail on all document actions.



### MANUFACTURING

Securely store and quickly retrieve material certificates, SOPs and training records; automate product warranty registration; ensure all health and safety information is easily accessible.



### OPERATIONS

Multi-site architecture, remote access options, and integration options allow coordination in disperse organizations. Analytic dashboards enable immediate reactivity to changes in operational metrics.



### CONTRACT MANAGEMENT

Automatic notifications for approaching expiry dates; ensure the correct contract is signed with version control; automatically manage contract e-signing processes.

## AND THAT'S JUST THE BEGINNING!

Therefore™ can be configured and customized to suit just about any departmental need or process, leading to streamlined operations, increased productivity, and higher customer satisfaction.

# EDITIONS

## REGION: AMERICAS

	Personal Edition	Workgroup Edition	Essentials Edition	Enterprise Edition	Therefore™ Online
Number of Users	1	5 - 50	5 - 50	2 - ∞	2 - ∞
<b>SERVER / DATABASE / STORAGE</b>					
Windows® Server 32/64-bit*	•	•	•	•	Server infrastructure provided as part of service
Support for multiple servers				•	
Microsoft® SQL Server*	•	•	•	•	
Oracle				•	
DAS, NAS, San and local RAID, NetApp® SnapLock		•	•	•	
<b>THEREFORE™ CLIENTS</b>					
Navigator, Viewer, and Case Manager*	•	•	•	•	•
Web Access (Web Navigator & Viewer)*		•	•	•	•
Mobile App (Tablet, Phone)*		•	•	•	•
Therefore™ Portal (Unlimited Read Only External)				optional	optional
<b>PRODUCTIVITY TOOLS</b>					
Business Analytics	•	•	•	•	•
Therefore™ Workflow*			•	•	•
GUI Drag & Drop Workflow Designer			•	•	•
Therefore™ Forms*	•	•	•	•	•
Therefore™ Tasks		•	•	•	•
<b>SECURITY &amp; PERMISSIONS</b>					
Windows® Local Users and Groups	•	•	•	•	•
Active Directory + Azure AD	•	•	•	•	•
Therefore™ Internal Users	•	•	•	•	•
LDAP/ SAMBA Support	•	•	•	•	•
Okta, JWT, OAuth 2.0, Open ID	•	•	•	•	•
LDAP/ SAMBA Support		•	•	•	
<b>DOCUMENT ADMINISTRATION</b>					
Information Lifecycle Management		•	•	•	•
Audit Trail	•	•	•	•	•
<b>ELECTRONIC DOCUMENT IMPORT</b>					
Therefore™ PDF Printer	•	•	•	•	•
Therefore™ Document Loader	•	•	•	•	•
Therefore™ Content Connector		optional	optional	optional	optional

	Personal Edition	Workgroup Edition	Essentials Edition	Enterprise Edition	Therefore™ Online
Number of Users	1	5 - 50	5 - 50	2 - ∞	2 - ∞
<b>CAPTURE INTEGRATION</b>					
Therefore™ Capture Client (Barcode/OCR, support for ISIS & Kofax® drivers)	•	optional	optional	optional	optional
uniFLOW Capture	optional	optional	optional	optional	optional
Therefore™ MFP Application	optional	optional	optional	optional	optional
Kofax® Capture® and VRS		optional	optional	optional	
eCopy® ShareScan®		optional	optional	optional	optional
Support for TWAIN drivers	•	•	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•	•	•
<b>EMAIL ARCHIVING</b>					
Microsoft® Outlook®	•	•	•	•	•
Mailbox Monitoring		optional	optional	optional	optional
Microsoft® Exchange Server				optional	optional
<b>ADDITIONAL 3RD PARTY INTEGRATION</b>					
Integration with External Databases	•	•	•	•	•
Microsoft® Office	•	•	•	•	•
Windows® Explorer	•	•	•	•	•
3rd party applications using Universal Connector*		optional	optional	optional	optional
Microsoft Dynamics® NAV*				optional	
Microsoft® SharePoint®				optional	optional
SAP Netweaver®				optional	
eCopy® PDF Pro Office	•	•	•	•	•
Custom integration using Therefore™ API	Optional as part of the Therefore™ SDK, purchased with a Therefore™ Developer Edition*				
<b>PLUG-INS FROM 3RD PARTY PROVIDERS*</b>					
Objectif Lune® PlanetPress®	optional	optional	optional	optional	optional
All Document Capture Solutions by I.R.I.S.	optional	optional	optional	optional	optional
<b>USER LICENSES</b>					
Named	•	optional	optional	optional	optional
Concurrent		optional	optional	optional	optional
Read Only				optional	optional

\* Contact your local provider for details

\* Available for purchase through 3rd party supplier

Certain limitations may apply. Please see the Therefore™ 2019 Installation Manual for further information. Final specifications are subject to change without notice.

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**Canon**

CANON SOLUTIONS AMERICA

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<sup>®</sup> The firm Ebner Stolz audited Therefore (v 17.2.1) in 2017 and concluded that, when properly used and specific organization controls are in place, this software enabled clients to comply with the data protection requirements for software solutions per the EU General Data Protection Regulation (EU GDPR).

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