

PEOPLE. PROCESS. INFORMATION.
2016 PRODUCT BROCHURE



WHY THEREFORE™?

In today's fast-paced business environment, efficient information and document management are essential. Gain a competitive edge by being able to store, access, analyze, and retrieve your data instantly. Enhance your data security, and boost the confidence of your staff and customers through newfound efficiency and reactivity.

WITH THEREFORE™ YOU CAN STREAMLINE BUSINESS PROCESSES

- Digitize your office and business processes
- Find and retrieve your information quickly
- Maintain an overview of all processes and tasks
- Generate reports about key business processes
- Use automatic versioning to keep track of changes
- Enable mobility and flexible access to information
- Increase information security and peace of mind
- Seamlessly connect to your ERP/CRM system



Therefore™ is an enterprise-grade information management system suited for managing any type of information. Paper and electronic documents—including e-mails, spool files, images, and even videos—can be stored, shared, and processed in a secure, user-friendly manner.

Easily integrate Therefore™ into your existing IT environment using its third-party connectors or Software Development Kit. As a Microsoft® Gold Certified partner, Therefore™ places a strong focus on quality, and rigorous QA tests are employed to ensure the reliability of its product.

End users and administrators alike will appreciate the intuitive user interface, flexible workflow design, electronic signatures, easy integration, and high-powered search engine.

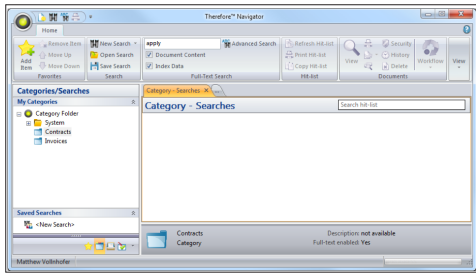
Therefore™ allows you to capture, organize, and access all your content and business-critical information. In addition, it offers business analytics tools to enable even better oversight of your business processes!





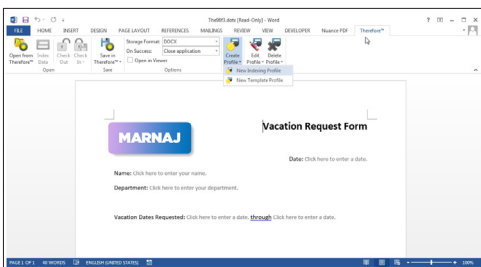
FIND

Therefore™ enables you to find your information in any format in seconds—keywords, full-text, or category searches. The OCR engine can even read text from images, enabling you to find all your documents quickly and easily.



SAVE

Therefore™ comes standard with a connector to Microsoft Office, making it easy to save documents from Word, Outlook, Excel, or PowerPoint® directly to Therefore™ using the “Save to Therefore™” button. Any other kind of document can be saved into Therefore™ using a variety of other methods, including simple drag-and-drop.



VIEW

Documents can be viewed using the Therefore™ Viewer even if the matching application isn't installed on the user's PC. In addition to displaying documents, the Therefore™ Viewer can display and play videos.



PROCESS YOUR INFORMATION

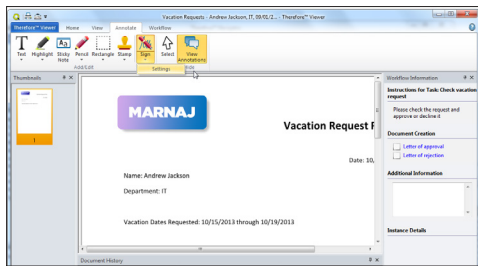
Therefore™ Workflows can be configured to improve process efficiency, decrease delays, and improve the visibility and transparency of an endless number of processes. Validate contracts, approve invoices, and receive notifications when a file has been completed. Processes can be overseen, analyzed, and optimized with Therefore™ Business Analytics and integration with Microsoft Power BI.

Straightforward and intuitive to use, Therefore™ makes it easy to sort documents, add notes and comments, and affix signatures or stamps to documents directly from its interface. Receive notifications when new documents are added or changed and reminders when tasks are overdue.

WITH THEREFORE,™ YOU HAVE SECURITY OF INFORMATION

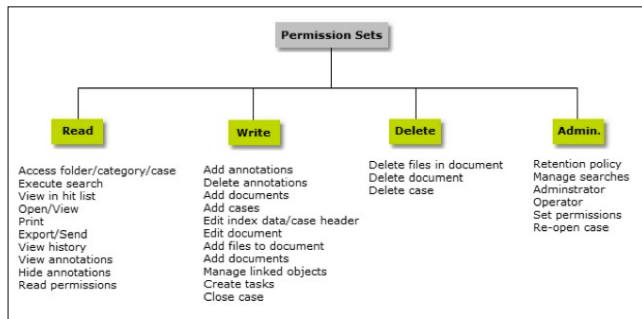
ELECTRONIC SIGNATURE

Documents are saved in Therefore™ in their original formats and automatically signed by Therefore™ upon receipt. This signature includes information about the document and its contents, which helps ensure the legitimacy of the file. In addition, you can add a personal electronic signature when exporting documents and affix electronic signatures to PDFs. You can even send documents and contracts to external contacts for legal signature using integrations with digital transaction management providers, such as DocuSign®.



PERMISSIONS AND SECURITY

Therefore™ makes it possible to easily import users from Active Directory or LDAP, and assign permissions based on groups, index data, or even on a single document.



LEGAL COMPLIANCE

Therefore™ securely stores documents and prepares them for deletion once their legally mandated retention period has passed. The Therefore™ Export function allows documents to be exported to alternative media if necessary.

STORAGE DEVICES

Therefore™ supports primary and backup storage on secure media, including NAS, RAID, and NetAPP SnapLock.



ADMINISTRATION

Our Solution Designer makes it easy to centrally administer the system. You can quickly add users, create workflows using the graphic drag-and-drop workflow module, set permissions, and even add servers. Administration is uncomplicated and intuitive. You can quickly learn to independently administrator the system, and no customization is necessary.

SCALABILITY

Therefore™ is completely scalable; moving from a single user to a complete enterprise system is simple—all you need to do is update the license and configure the additional users. Rest assured knowing your solutions can expand and grow along with your business.

IMPORT AND AUTOMATICALLY INDEX

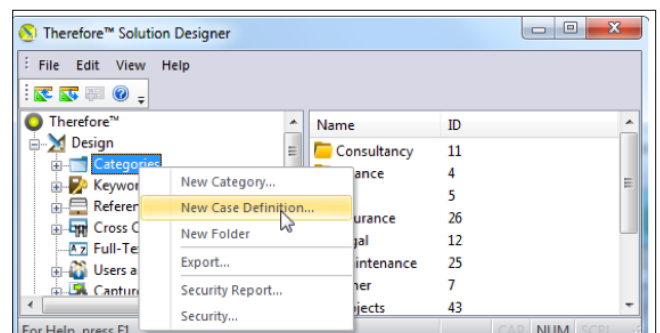
Regardless of whether your information arrives electronically or physically, Therefore™ can provide you with the tools to easily index and save it. Indexing Profiles allow information from a document's contents to be automatically extracted and saved as associated index data. Data can be extracted from Office templates or documents, e-mails, PDFs, images, and XML files. Our Capture Client makes it easy to import and index paper documents. Therefore™ supports OCR and bar code recognition and can integrate with advanced scanning solutions such as Kofax and IRIS.

Electronic documents can be imported and indexed automatically for stress-free processing. You can use an existing Microsoft® Windows structure to index and import your documents into Therefore™. Import documents from a watched folder via Content Connector, or use a Document Loader for importing and indexing large batches of electronic files. Once imported, documents can be incorporated into Therefore™ workflows or cases, and retention policies can be applied for life cycle management.



MANAGE YOUR PROJECTS

Related documents pertaining to a case, record, or project are easily managed collectively within Therefore™. The Therefore™ Case Manager provides an overview of all documents related to the case at once, lets you see which documents are missing, and even allows you to start and process workflows on the case level. Since Therefore™ is flexible and user friendly, a case for any sector or type of document can be created in minutes.



THEREFORE:™ GREATER FREEDOM AND PRODUCTIVITY

One of the benefits of information management is the ability to access business documents outside the office, without compromising security. Therefore™ makes it easy to mobilize your documents, cases, and workflows.

THEREFORE™ ANYWHERE

No Internet? No problem! Therefore™ Anywhere enables you to take your documents offline, make changes, and then synchronize when reconnected with the server.

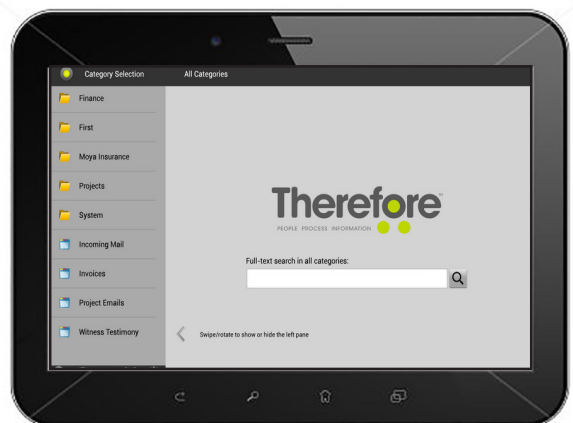
THEREFORE™ WEB ACCESS

Therefore™ Web Access gives you the power of the Therefore™ information management system directly from your Web browser. All common browsers are supported, including Google Chrome, Mozilla Firefox, Internet Explorer, Safari, and Opera. Find, view, and edit your documents, plus process workflow tasks from the Web. This is a great addition for employees who work from home or those who spend time away from their office network.

THEREFORE™ MOBILE APP

The Therefore™ Mobile app is a great companion to your Therefore™ system, enabling you to stay in touch with your workflows, cases, and documents. From the mobile app you can process workflows, view and edit documents and cases, save and edit files from supported applications, and take pictures and send them to Therefore™ Reports and real-time data generated by the Therefore™ system can be viewed either with the mobile app or using a direct integration to Microsoft Power BI. The mobile app is supported on Android®, Windows®, and iOS devices.

In addition, the mobile app can be used with the Canon CaptureOnTouch app to scan documents using a portable scanner and tablet—a great efficiency booster for traveling employees or salespeople who want to be able to save signed contracts directly into the system when away from the office.



THEREFORE™ ONLINE

Organizations looking for an alternative investment to IT infrastructure will be attracted to the Cloud solution, which provides maintenance-free service and the flexibility to increase user licenses and storage space when needed. The Cloud solution supports all the major functionalities as the on-premise version, but instead of having to maintain your own network, it's installed in a highly secure data center. Low start-up costs and monthly payments make it economically viable even for companies on tight budgets. You can access the Cloud using the Therefore™ installed client, Web client, or mobile app.

CONNECT WITH YOUR CUSTOMERS

The Therefore™ Portal is a great way to provide customers secure access to their own documents. Using the Therefore™ Portal, administrators can make customers' documents available to them for read-only access, ensuring a high level of security while providing great flexibility. The Portal can be embedded into a Web site and easily customized to fit the look and feel of a company by changing the skin or adding a logo. Additionally, administrators can design highly customized forms in the Therefore™ Solution Designer, which can be hosted on a Web site. This provides a means for customers to submit data that's automatically saved to Therefore™—a great feature for customer feedback surveys, employee on-boarding, and more!

Therefore
o n l i n e 



Therefore	Personal Edition One user	Workgroup Edition Unlimited Users	Essentials Edition Unlimited Users	Enterprise Edition Unlimited Users	Therefore™ Online Unlimited Users
Server/Database/Storage					
Windows® Server 32/64-bit*	•	•	•	•	Server infrastructure provided as part of service
Support for Multiple Servers				•	
Microsoft® SQL Server*	•	•	•	•	
Oracle				•	
IBM® DB2**				•	
DAS, NAS, San and local RAID, NetApp® SnapLock		•	•	•	
Therefore™ Clients					
Navigator, Viewer, and Case Manager*	•	•	•	•	•
Web Access (Web Navigator and Viewer)*		•	•	•	•
Gadget (Web and Installed)*	•	•	•	•	•
Mobile App (Tablet, Phone)*		•	•	•	•
Therefore™ Portal (Unlimited Read Only External Access)				optional	optional
Productivity Tools					
Business Analytics	•	•	•	•	•
Therefore™ Workflow			•	•	•
GUI Drag and Drop Workflow Designer			•	•	•
Therefore™ Tasks		•	•	•	•
Security and Permissions					
Windows® Local Users and Groups	•	•	•	•	
Active Directory*	•	•	•	•	
Therefore™ Internal Users	•	•	•	•	•
LDAP/SAMBA Support		•	•	•	
Document Administration					
Information Lifecycle Management	•	•	•	•	•
Audit Trail	•	•	•	•	•
Capture Integration					
Therefore™ Capture Client (Barcode/OCR)	•	•	•	optional	optional
Therefore™ MFP Application	optional	optional	optional	optional	optional
Kofax® Capture® and VRS		optional	optional	optional	optional
eCopy® ShareScan®		optional	optional	optional	optional
Support for ISIS, TWAIN and Kofax® drivers	•	•	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•	•	•
Electronic Document Import					
Therefore™ PDF Printer	•	•	•	•	•
Therefore™ Document Loader	•	•	•	•	•
Therefore™ Content Connector		optional	optional	optional	optional
E-mail Archiving					
Microsoft® Outlook®	•	•	•	•	•
Mailbox Monitoring		optional	optional	optional	optional
Microsoft® Exchange Server				optional	
IBM® Lotus Notes®				optional	
Additional Third-Party Integration					
Integration with External Databases	•	•	•	•	•
Microsoft® Office	•	•	•	•	•
Windows® Explorer	•	•	•	•	•
Third-party applications using Universal Connector*		optional	optional	optional	optional
Microsoft Dynamics® NAV*				optional	
Microsoft® SharePoint®*				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*				
Plug-Ins from Third-Party Providers					
Objectif Lune® PlanetPress®	optional	optional	optional	optional	optional
uniFLOW Capture	optional	optional	optional	optional	optional
All Document Capture Solutions by I.R.I.S.	optional	optional	optional	optional	optional
User Licenses					
Named		optional	optional	optional	optional
Concurrent	•	optional	optional	optional	optional
Read-Only				optional	optional

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