2022 Product Brochure

Therefore™

PEOPLE PROCESS INFORMATION

Why Therefore™

Your Challenges:

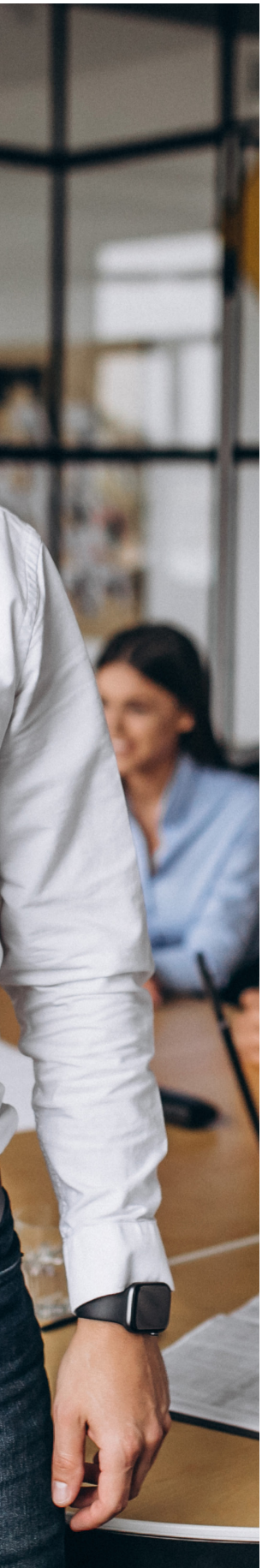
Efficiency
Difficulty accessing correct information; slow, chaotic processes.

Compliance
Information retention for legal purposes; confidentiality.

Security
Preventing unauthorized access; data backup; disaster recovery.

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

People Process Information



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.

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

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

Security
Keep your information safe, secure and confidential.

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

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

Why 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.

With Therefore™

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.

A SECURE DIGITAL REPOSITORY

Privacy by default. Privacy by design.

- Access controls & 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).

Anti-Tamper Measures
Access Controls
Disaster Recovery

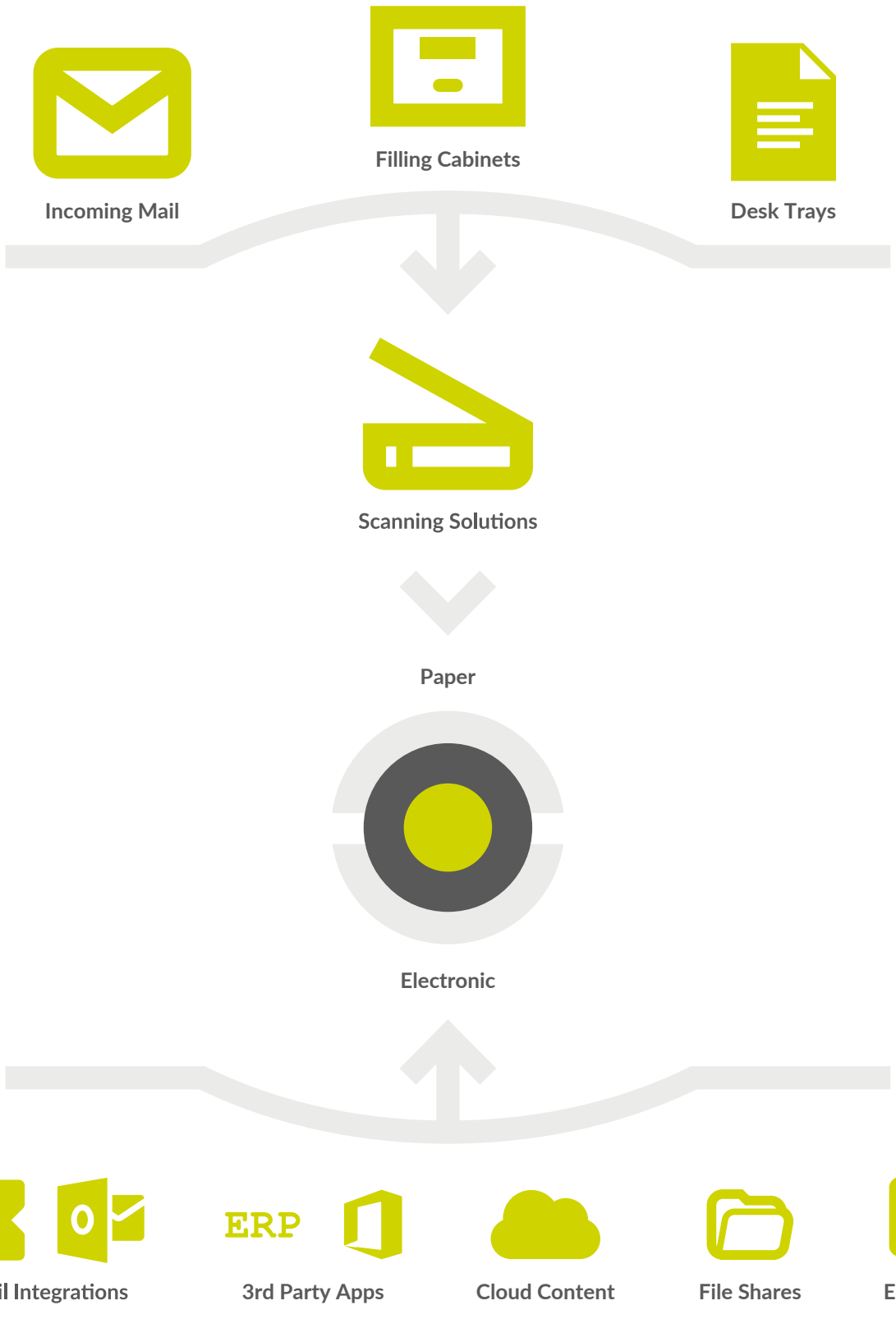
CAPTURE AND UTILIZE YOUR INFORMATION

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 e-mail communications.
- Paper documents – Scan and index directly from scanning devices. Automatically classify and extract data with advanced scanning solutions. data can be recovered in case of drive failure.

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.


Incoming Mail
Filling Cabinets
Desk Trays
Scanning Solutions
Paper
Electronic
E-mail Integrations
ERP
3rd Party Apps
Cloud Content
File Shares
E-Forms

LEVERAGING INFORMATION as A STRATEGIC ASSET

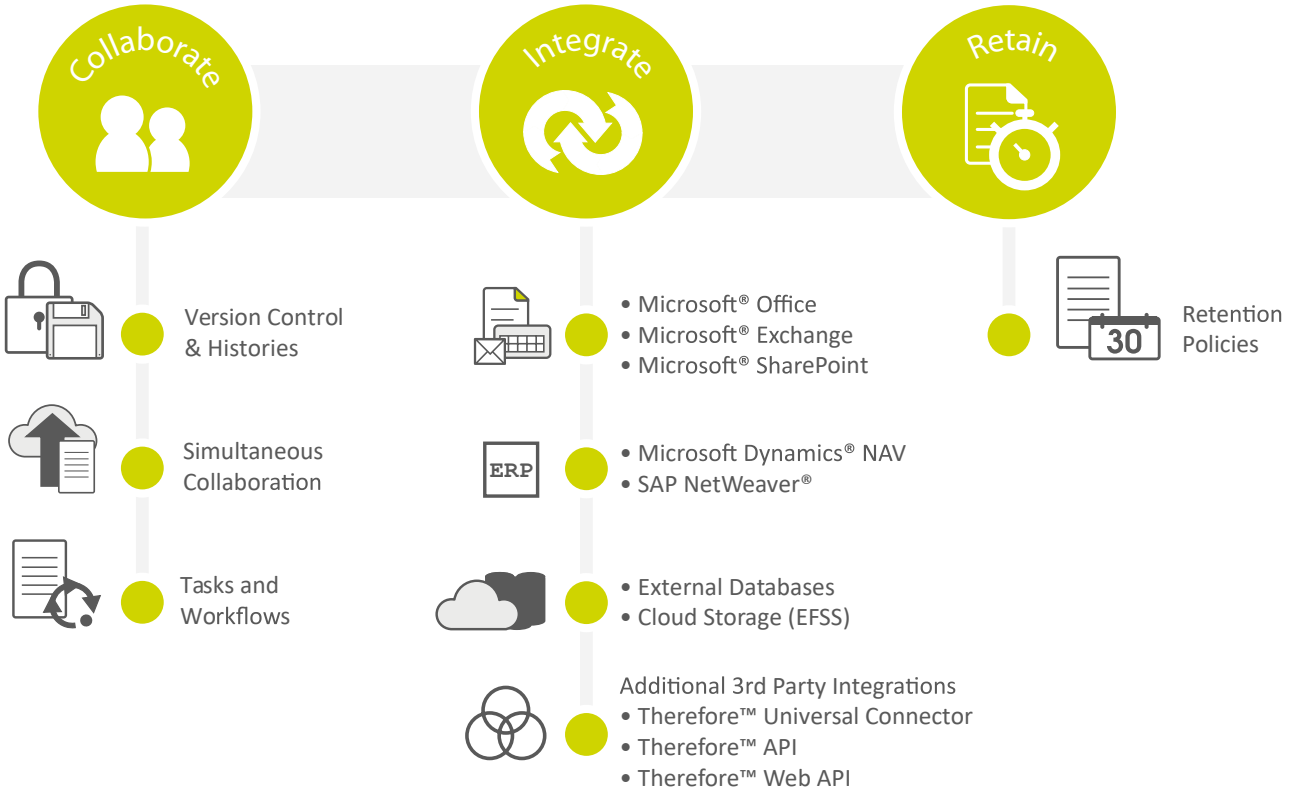
Update, refresh and manage information effectively across all areas of your business.

- 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.


Collaborate
Integrate
Retain
Version Control & Histories
Simultaneous Collaboration
Tasks and Workflows
• Microsoft® Office
• Microsoft® Exchange
• Microsoft® SharePoint
ERP
• Microsoft Dynamics® NAV
• SAP NetWeaver®
• External Databases
• Cloud Storage (EFSS)
Additional 3rd Party Integrations
• Therefore™ Universal Connector
• Therefore™ API
• Therefore™ Web API
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Retention Policies

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, e-mail, 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.

Installed Application
Web Access
Therefore™ Go
Therefore™ Anywhere

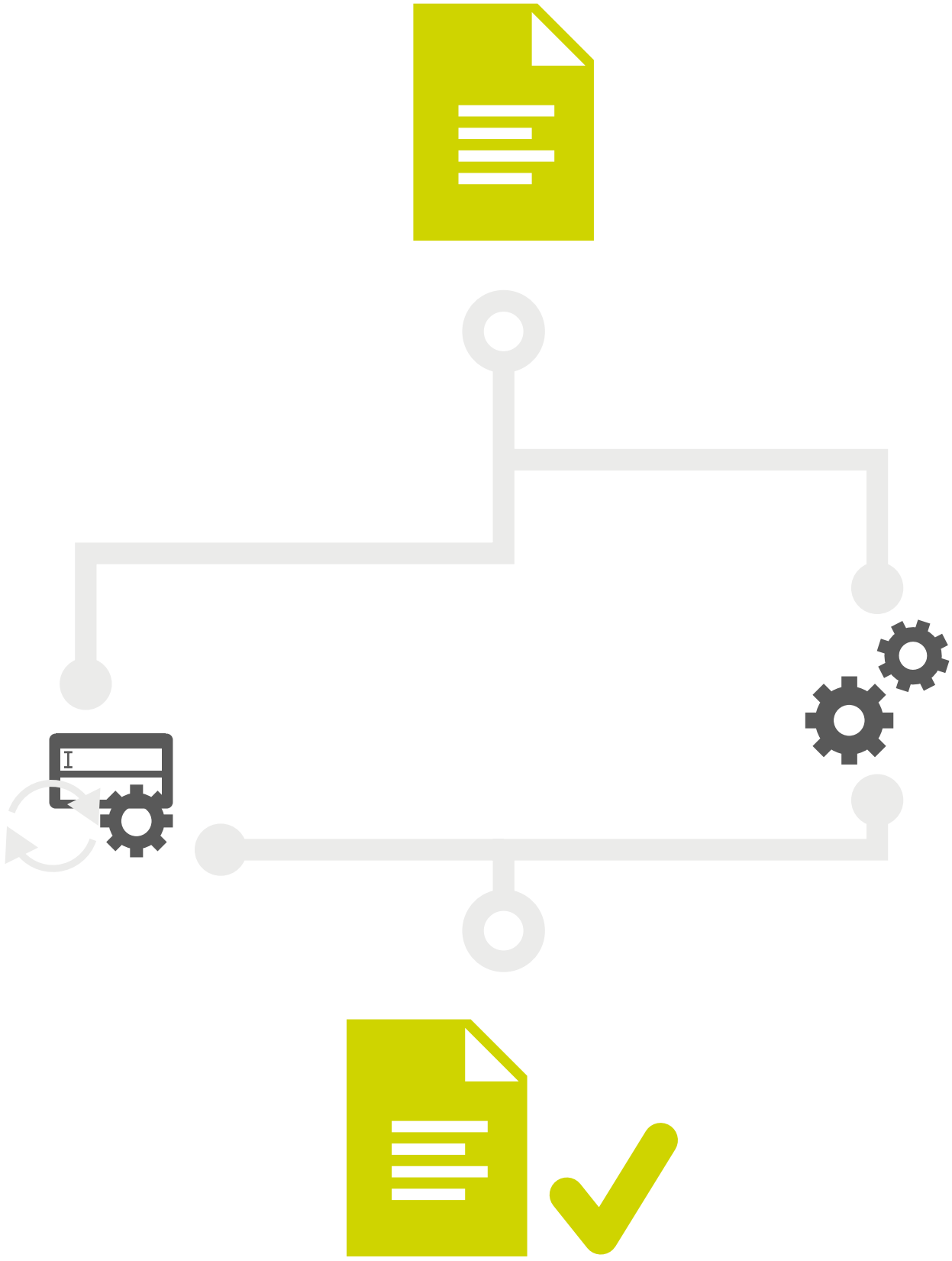
Access
Share

Export or Send
Therefore™ Portal
Share to Cloud

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, e-mail boxes, digital signature providers, or cloud storage accounts. Automate the flow of information coming into your company!
- Therefore™ Smart Capture – Therefore™ Smart Capture uses artificial intelligence to extract data from invoices and other similar documents. Smart Capture is quick to install, and starts extracting data accurately right away. Regional availability may vary.



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.

Report
Track
React

How Therefore™ helps

Human Resources

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

Finance

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

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.

Contract Management

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

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.

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.

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.

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: Europe, Middle East, Africa

	Workgroup Edition	Business Edition	Therefore™ Online
Number of users	5 - 50	2 - ∞	2 - ∞
Server / Database / Storage			
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	•	•	
Therefore™ Clients			
Navigator, Viewer, and Case Manager*	•	•	•
Web Access (Web Navigator & Viewer)*	•	•	•
Mobile App (Tablet, Phone)*	•	•	•
Therefore™ Portal (Unlimited Read Only External)		optional	optional
Productivity Tools			
Business Analytics	•	•	•
Therefore™ Workflow		•	•
GUI Drag & Drop Workflow Designer		•	•
Therefore™ eForms	•	•	•
Therefore™ Tasks	•	•	•
Security & Permissions			
Windows® Local Users and Groups	•	•	
Active Directory®	•	•	•
Therefore™ Internal Users	•	•	•
Okta, Azure AD, OneLogin	•	•	•
JWT, OAuth 2.0, OpenID	•	•	•
LDAP/ SAMBA Support	•	•	•
Document Administration			
Information Lifecycle Management	•	•	•
Audit Trail	•	•	•
Electronic Document Import			
Therefore™ PDF Printer	•	•	•
Therefore™ Document Loader	•	•	•
Therefore™ Content Connector	optional	optional	optional
Therefore™ Smart Capture		optional	optional

	Workgroup Edition	Business Edition	Therefore™ Online
Capture Integration			
Therefore™ Capture Client (Barcode/OCR, support for ISIS & Kofax® drivers)	•	optional	optional
uniFLOW Capture	optional	optional	optional
Therefore™ MFP Application	optional	optional	optional
Kofax® Capture® and VRS	optional	optional	optional
eCopy® ShareScan®	optional	optional	
Support for TWAIN drivers	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•
E-mail Archiving			
Microsoft® Outlook®	•	•	•
Mailbox Monitoring	optional	optional	optional
Microsoft® Exchange Server		optional	optional
Additional 3rd Party Integration			
Integration with External Databases	•	•	•
Microsoft® Office	•	•	•
Windows® Explorer	•	•	•
3rd party applications using Universal Connector®	optional	optional	optional
Microsoft Dynamics® NAV and 365 Business Central		optional	optional
Microsoft® SharePoint®*		optional	optional
SAP Netweaver®		optional	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 3rd Party Providers†			
Objectif Lune® PlanetPress®	optional	optional	optional
All Document Capture Solutions by I.R.I.S.	optional	optional	optional
User Licenses			
Named	•	optional	optional
Concurrent		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™ 2022 Installation Manual for further information.
Final specifications are subject to change without notice.
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