Canon | Therefore™

PEOPLE PROCESS INFORMATION

2023 PRODUCT BROCHURE

WHY THEREFORE™

YOUR CHALLENGES

Efficiency
Difficulty accessing correct information; slow, chaotic processes.

Compliance
Information retention and confidentiality.

Security
Help prevent unauthorized access; data backup; disaster recovery.

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. Therefore™ gives you …

Productivity
Recoup the time you lose searching for information amid chaotic processes.

Reactivity
React to your customers' needs in a timely, professional manner with all your data in one place.

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

Security
Access controls help keep your information safe, secure, and confidential.

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

THEREFORE™ CAN HELP YOU …

Secure
data within a central, digital repository.

Capture
and utilize paper and electronic information.

Manage
information as a strategic asset.

Access
your data virtually anytime, anywhere.

Automate
and optimize many core business processes.

Analyze
and react to key performance indicators.

Take steps to protect yourself from data security breaches, gain visibility into your operations, and boost productivity through flexible and intuitive information management.

Flexible
Data can be on-site or in the cloud, for one department or multiple sites.

Intuitive
Users can quickly and easily learn how to use the system.

Scalable
Start simple and add more as your business grows.

A DIGITAL REPOSITORY WITH SECURITY IN MIND

Anti-Tamper
Measures

Access
Controls

Disaster
Recovery

Access controls and permissions

Only authorized users can access the system. Permissions on content can easily be defined for individual users or user groups.[1]

Anti-tamper measures

The system verifies the authenticity of documents each time they're retrieved.

Disaster recovery

Standard automatic backup storage options allow your data to be recovered in case of drive failure.

CAPTURE AND UTILIZE YOUR INFORMATION

Leverage your business information in many different formats.

Electronic documents

Efficiently import electronic information with simple manual or streamlined automatic importing options. Integrations allow virtually seamless saving directly from compatible third-party software, including Microsoft® Office.[2] The Microsoft® Exchange connector automatically centralizes strategic email communications.

Paper documents

Scan and index directly from compatible scanning devices. Automatically classify and extract data with many 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 can be easily designed and customized, and used either internally or on an external website. They can adapt dynamically to responses and be embedded on a website or customer portal. Forms can make employee vacation requests, customer satisfaction surveys, and many other processes fast, smart, and reliable.

Incoming Mail

Filing Cabinets

Desk Trays

Scanning Solutions

Paper

Electronic

ERP

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 compatible third-party software, leveraging native integrations, the Therefore™ Universal Connector, or the Therefore™ API.[2]

Retain

Comply with your legal and regulatory requirements regarding confidentiality and document retention.[1]

Feature Focus:
MICROSOFT TEAMS INTEGRATION

Therefore™ 2023 integrates with Microsoft Teams. Users can subscribe to receive notifications about changes to workflow processes they are involved in, such as new tasks. From within the Teams app, users can process tasks, view the document in Therefore™, or enter additional information. They can also choose to open and process the document in the Therefore™ Web Client.

Collaborate

- Version Control and Histories
- Simulateneous Collaboration
- Tasks and Workflows

Integrate

- Microsoft® Office
- Microsoft® Exchange
- Microsoft® SharePoint
- Microsoft® Dynamics NAV
- SAP NetWeaver
- External Databases
- Cloud Storage (EFSS)
- Additional Third-party Integrations
  – Therefore™ Universal Connector
  – Therefore™ API
  – Therefore™ Web API

Retain

- 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.
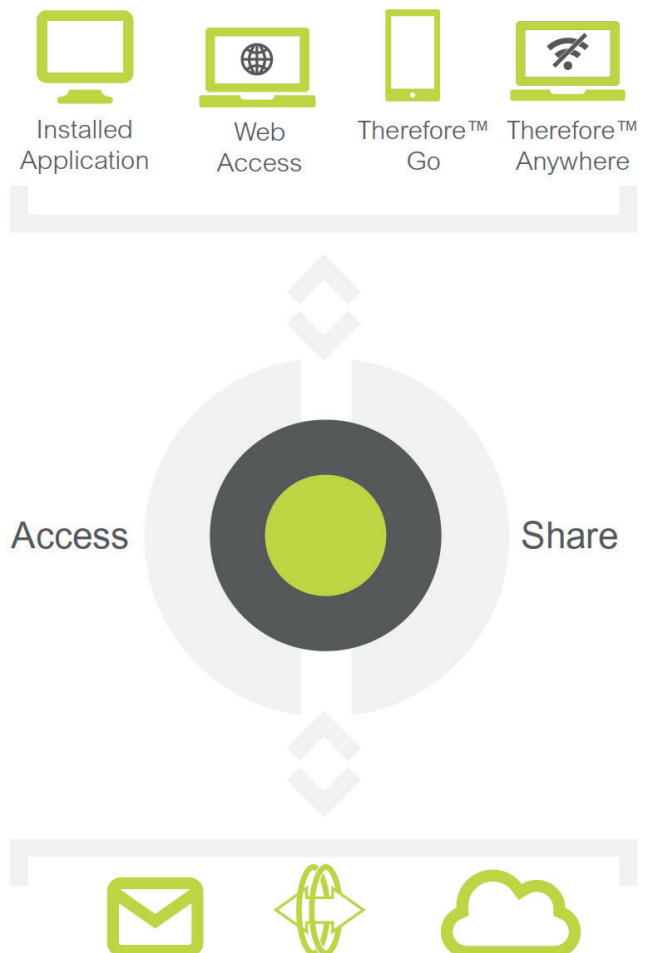
Access

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 your organization. It's simple to export, email, or share data when using Therefore™!

Feature Focus: THEREFORE™ PORTAL

Available as an add-on, the Therefore™ Portal is an efficient 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 log-in credentials that you grant and will only be able to view or upload documents that pertain to them.[1]

Installed Application

Web Access

Therefore™ Go

Therefore™ Anywhere

Access

Share

AUTOMATE AND ANALYZE
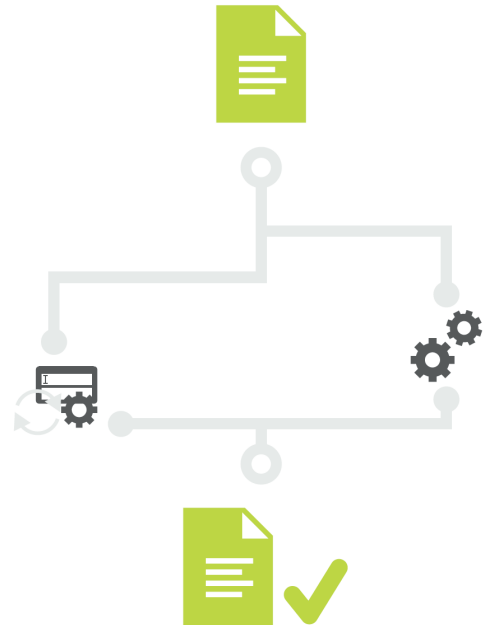
STREAMLINE CORE BUSINESS PROCESSES

Gain greater efficiency, visibility, and consistency.

Therefore™ Workflow
Therefore™ can help you automate 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.

Therefore™ Content Connector
This 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 AND REACT TO KEY PERFORMANCE INDICATORS

Stay on top of the metrics that are 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 to support your privacy and regulatory compliance efforts.

React
Bring your data to life with dynamic, real-time dashboards. Users can quickly 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 track of employee records and retrieve them easily.

Finance
Optimize invoice processing with workflows and automatic linking; track approvals and payment records; automate payroll and integrate with existing compatible ERP software.[2]

Manufacturing
Store and quickly retrieve material certificates, SOPs, and training records; automate product warranty registration; keep your health and safety information easily accessible.

Contract Management
Set up notifications for approaching expiration dates; keep contracts in order with version control; automatically manage contract e-signing processes.

Customer Service
Easily group customer documents into digital binders; have the most current information easily retrievable; inform customers quickly 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 an audit trail on document actions.

Operations
Multisite architecture plus remote access, and integration options allow coordination in dispersed organizations. Analytic dashboards enable quick reactivity to changes in operational metrics.

AND THAT'S JUST THE BEGINNING!

Therefore™ can be configured and customized to suit a wide array of departmental needs or processes. This helps you achieve streamlined operations, increased productivity, and higher customer satisfaction.

REGION: AMERICAS

	Workgroup Edition	Essentials Edition	Enterprise Edition	Therefore™ Online
NUMBER OF USERS	5 - 50	5 - 50	2 - ∞	1 - ∞
SERVER/DATABASE/STORAGE				
Windows® Server 32/64-Bit[3]	•	•	•	
Support for Multiple Servers			•	Server infrastructure provided as part of service.
Microsoft® SQL Server[3]	•	•	•	
Oracle			•	
DAS, NAS, San, and local RAID, NetApp® SnapLock	•	•	•	
THEREFORE™ CLIENTS				
Navigator, Viewer, and Case Manager[3]	•	•	•	•
Web Access (Web Navigator and Viewer)[3]	•	•	•	•
Mobile App (Tablet, Phone)[3]	•	•	•	•
Therefore™ Portal (Unlimited Read-Only External)			Optional	Optional
PRODUCTIVITY TOOLS				
Business Analytics	•	•	•	•
Therefore™ Workflow[3]		•	•	•
GUI Drag-and-Drop Workflow Designer		•	•	•
Therefore™ E-Forms	•	•	•	•
Therefore™ Tasks	•	•	•	•
SECURITY AND PERMISSIONS				
Windows® Local Users and Groups	•	•	•	
Active Directory®	•	•	•	•
Therefore™ Internal Users	•	•	•	•
LDAP/SAMBA Support	•	•	•	•
JWT, OAuth 2.0, Open ID	•	•	•	•
Okta, Azure AD, OneLogin	•	•	•	•
DOCUMENT ADMINISTRATION				
Information Life Cycle Management	•	•	•	•
Audit Trail	•	•	•	•
ELECTRONIC DOCUMENT IMPORT				
Therefore™ PDF Printer	•	•	•	•
Therefore™ Document Loader	•	•	•	•
Therefore™ Content Connector	Optional	Optional	Optional	Optional

	Workgroup Edition	Essentials Edition	Enterprise Edition	Therefore™ Online
NUMBER OF USERS	5 - 50	5 - 50	2 - ∞	1 - ∞
CAPTURE INTEGRATION				
Therefore™ Capture Client (Barcode/OCR, support for ISIS/Kofax® drivers)	Optional	Optional	Optional	Optional
uniFLOW Capture	Optional	Optional	Optional	Optional
Therefore™ MFP Application	Optional	Optional	Optional	Optional
Kofax® Capture® and VRS	Optional	Optional	Optional	Optional
eCopy® ShareScan®	Optional	Optional	Optional	Optional
Support for TWAIN Drivers	•	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•	•
EMAIL ARCHIVING				
Microsoft® Outlook®		•	•	•
Mailbox Monitoring	Optional	Optional	Optional	Optional
Microsoft® Exchange Server			Optional	Optional
ADDITIONAL THIRD-PARTY INTEGRATION				
Integration with External Databases	•	•	•	•
Microsoft® Office	•	•	•	•
Windows® Explorer	•	•	•	•
Third-party Applications Using Universal Connector[3]	Optional	Optional	Optional	Optional
Microsoft Dynamics® NAV and 365 Business Central			Optional	Optional
Microsoft® SharePoint®[3]			Optional	Optional
SAP Netweaver®			Optional	Optional
Kofax Power PDF	•	•	•	•
Custom Integration Using Therefore™ API	Optional as part of the Therefore™ SDK, purchased with a Therefore™ Developer Edition[3]			
OPTIONAL PLUGINS[4]				
Objectif Lune® PlanetPress®	Optional	Optional	Optional	Optional
All Document Capture Solutions by I.R.I.S.	Optional	Optional	Optional	Optional
USER LICENSES				
Named	Optional	Optional	Optional	Optional
Concurrent	Optional	Optional	Optional	Optional
Read-Only			Optional	Optional
INCLUDED STORAGE PER USER				
Named				100 GB
Concurrent				100 GB

[1] *Canon offers products that contain certain security features, yet many variables can impact the security of your devices and data. Canon does not warrant that use of features will prevent security issues. Nothing herein should be construed as legal or regulatory advice concerning applicable laws; customers must have their own qualified counsel determine the feasibility of a solution as it relates to regulatory and statutory compliance. Some security features may impact functionality/performance; you may want to test these settings in your environment.*

[2] *Purchase of and/or subscription to a third-party service may be required. Subject to third-party provider's Terms and Conditions. Neither Canon Inc., or Canon U.S.A., Inc., represents or warrants any third-party product or feature referenced hereunder.*

[3] *Contact your Canon representative for details.*

[4] *Optional plugins require additional purchase.*

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