Therefore™
2021

PEOPLE.
PROCESS.
INFORMATION.
WHAT IS THEREFORE 2021?

Staying ahead in a competitive market often requires having efficient processes in place and the ability to use information as a strategic asset. Therefore can help provide visibility into your operations and boost productivity through flexible and intuitive information management.

THEREFORE 2021 CAN HELP YOU:
• Save time searching for your information while increasing productivity;
• React to your customers’ needs in a timely manner;
• Maintain a clear overview of your processes with enhanced visibility and the tracking of business-critical metrics;
• Keep track of your organization’s sensitive information; and,
• Access your information anytime from virtually anywhere.

COMMON CUSTOMER CHALLENGES
• Efficiency: Difficulty accessing correct information; slow, chaotic processes
• Compliance: Information retention for legal purposes; confidentiality
• Information Access: Preventing unauthorized access; implementing security features; data backup; disaster recovery
• Cost Effectiveness: High physical storage costs; time- and labour-intensive processes

HOW IT WORKS
Help capture and leverage your business’ information, regardless of its format!

Using simple manual or streamlined importing options, your organization can import its information from electronic documents efficiently. This includes information contained in virtually any type of business-critical documents, such as agreements and HR documents. In addition, Therefore can enable users to seamlessly save their information directly from a wide array of third-party software (e.g., Microsoft Office) with available integrations.

For emails, Therefore’s optional Microsoft Exchange Connector can be utilized to centralize and help protect information contained in email communications. Because such communications must often be retained and archived for audit or traceability purposes, once set up, the Microsoft Exchange Connector can enable users to automatically archive emails in Therefore according to pre-defined policies.

Using the Therefore Forms feature, users can quickly and intuitively capture data with the ability to adapt dynamically to responses. With Therefore eForms, forms can be easily designed and customized for use internally to collect data, such as employee vacation requests. Forms can also be embedded onto a website or customer portal, helping to make customer satisfaction surveys and many other processes fast, smart, and reliable.

For paper-based documents, users may scan and index directly from compatible scanning devices. Auto-classification and extraction of data can be completed using advanced scanning solutions, such as those developed by I.R.I.S.

FLEXIBLE. EASY TO USE. SCALABLE.
• On-premise or in the cloud; for single department to multisite deployments.
• Users can quickly and easily learn how to use this intuitive solution.
• Start simple and add more as your business grows.
HOW THEREFORE CAN HELP

Therefore helps to provide users with control over their organization’s information. With Therefore, users can capture, implement access controls, automate, and analyze their information. The solution can be configured and customized to suit virtually any departmental need or process, which can lead to streamlined productivity and high customer satisfaction. These departments include the following:

**HUMAN RESOURCES**
Streamline recruiting, onboarding and off-boarding processes; manage leave/PTO requests; keep access controls to, and easy retrieval of, employee records.  

**FINANCE**
Optimize invoice processing with workflows and automatic linking; track approvals and payment records; automate payroll and integrate with existing, compatible Enterprise Resource Planning (ERP) software.

**MANUFACTURING**
Store and quickly retrieve material certificates, standard operating procedures (SOPs), and training records; automate product warranty registration; help ensure that health and safety information is easily accessible.

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

**LOGISTICS**
Digitize the approval of invoices, credit notes, and hauler payments; help streamline customer invoicing and transport documentation; maintain an audit trail on document actions.

**OPERATIONS**
Multistate architecture, remote access options, and integration options help allow coordination in dispersed organizations. Analytics dashboards help enable quick reactivity to change in operational metrics.

**THE THEREFORE DIFFERENCE**
- Help protect data within a central, digital repository with security features.
- Capture and utilize paper and electronic information.
- Manage information as a strategic asset.
- Access data virtually anytime, anywhere.
- Automate and optimize core business processes.
- Analyze and react to key performance indicators.
SECURITY FEATURES

Whether you’re capturing and integrating data from electronic or paper-based documents, Therefore offers several standard security features, including the following:

ACCESS CONTROLS AND PERMISSIONS
Set it up so 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’re retrieved.

DISASTER RECOVERY
Automatic backup storage allows your data to be recovered in case of drive failure.

GDPR COMPLIANCE AUDIT
Therefore has been audited by an independent third-party expert, who attests that Therefore v17.2.1 enables clients to comply with the data protection requirements for software solutions as per the EU Data Protection Regulation (EU GDPR).
LEVERAGE INFORMATION AS A STRATEGIC ASSET

Update, refresh, and manage information effectively across your business.

COLLABORATE
Work simultaneously on documents with authorized internal and external personnel. Easily track changes, assign tasks, and process information with workflows.

INTEGRATE
Seamlessly integrate with any compatible third-party software, leveraging native integrations, the Therefore Universal Connector, or the Therefore API.

RETAIN
Comply with your legal and regulatory efforts regarding confidentiality and document retention.

THEREFORE CASE MANAGEMENT
Organize and manage related documents logically and intuitively.
With Case Management, you can:
• Group interrelated documents for visibility and fast retrieval.
• Open/close cases, link them to workflows, and utilize retention policies for lifecycle management.
ACCESS

ACCESS YOUR INFORMATION VIRTUALLY ANYTIME, ANYWHERE!

Information that moves with you!

SEARCH
Find documents based on your document’s metadata or its contents, regardless of where it’s saved in the system.

SHARE
Easily share information with those inside or outside of your organization. It’s simple to export, email, or share information from Therefore!

ACCESS
Access your information in the office, on the web, or with Therefore™ Go mobile application. Therefore™ Anywhere allows you to edit documents offline and synchronize them later.

THEREFORE PORTAL
Therefore™ Portal is an efficient way to share and receive information directly with external parties using robust security features. Embed the Portal into your website and customize it to fit the look and feel of your company. External parties can sign-on with log-in credentials and will only be able to view or upload documents for which your administrator has set permissions.
AUTOMATE

STREAMLINE CORE BUSINESS PROCESSES
Gain great 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.

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
Therefore can help users stay on top of their metrics!

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 help with your compliance with privacy and security efforts.

REACT
Bring your data to life with dynamic, real-time dashboards. Allows users to quickly react to changes in performance indicators.
HOW IT WORKS
Therefore Online SMB Elite is a solution that can help your organization work efficiently by changing the way information is managed. It includes preconfigured folders, categories, eForms, and business reports to jump-start an organization’s digital transformation, helping users to save both time and money.

Many organizations experience challenges with finding important documents, including financial, legal, and human resource information. This has the potential to result in financial penalties, poor customer service, and other problems.

Therefore Online SMB Elite can help to solve these challenges by providing a standardized document repository to help save business-critical information in a solution that contains security features. The solution is hosted on Microsoft Azure, providing a high-performance and readily available user experience.

WHY THEREFORE ONLINE SMB ELITE?
• No minimum number of users required—order as many user licenses as needed to help support your business objectives!
• Preconfigured for quick use.
• Windows clusters comes standard for high availability.
• Provides disaster recovery for documents.
• Business analytics with prebuilt reports that are ready to use.
• Many more benefits add workflows, retention policies, Microsoft Power BI reports, and more!

1 Compatibility information is available at www.Therefore.net.
2 Canon Canada Inc. does not provide legal counsel or regulatory compliance consultancy, including without limitation, Sarbanes-Oxley, HIPAA, GLBA, Check 21 or the USA Patriot Act. Each customer must have its own qualified counsel determine the advisability of a particular solution as it relates to regulatory and statutory compliance.
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4 Purchase of, and/or Subscription to, a third-party service may be required. Subject to third-party provider’s Terms and Conditions.