



THEREFORE™  
**CONTENT & PROCESS  
MANAGEMENT SYSTEM**

Transform the way you manage  
and share business documents

**Canon**

**Therefore**  
PEOPLE PROCESS INFORMATION

# INFORMATION AS A STRATEGIC ASSET

**Staying ahead in a competitive marketplace requires efficient processes and the ability to use information as a strategic asset.**

Whether you are small business looking to improve customer service or a corporation aiming to reduce cost, improve security and optimise efficiency - Therefore™ organises and gives structure to your data and processes.

Gain competitive advantage and peace of mind with the knowledge your employees have access to the right information at the right time.

**With Therefore™ you can manage all aspects of the documents and information:**



#### **SECURE**

your data within a central, digital repository



#### **ACCESS**

your data anytime, anywhere.



#### **CAPTURE**

information from, paper, digital files and e-forms



#### **AUTOMATE**

and optimise core business processes



#### **MANAGE**

information, collaborate, integrate and set retention policies



#### **ANALYSE**

and react to key performance indicators



# Therefore™ benefits



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

## PRODUCTIVITY

- > Automate and optimise core business processes to achieve improved speed and accuracy
- > Quickly create, capture and find information to speed up customer responses

## SECURITY

- > Keep your information safe, secure and confidential in central digital repository
- > Gain clear overview of your data and business-critical processes to ensure compliance

## FLEXIBILITY

- > Access your information anytime, anywhere
- > Easily scalable solution available as on-premise implementation or fully managed cloud service





# CAPTURE INFORMATION

Leverage your business information, regardless of its source format

## Electronic documents:

Efficiently import electronic information individually or use streamlined automated options. You can save even more time with integrations which allow seamless saving directly from third party software, including Microsoft® Office. The Microsoft® Exchange connector automatically secures and centralises strategic e-mail communications and you can receive or create PDF documents in "X-Rechnung" format.

## Paper documents:

Scan and index directly from scanning devices. Automatically classify and extract data with advanced scanning solutions.

## E-Forms:

Quickly and intuitively capture data with Therefore™ E-Forms. Forms are easy to design and can be used either internally or embedded on external websites and customer portals. Forms can adapt dynamically to responses and make employee holiday requests, customer satisfaction surveys, and many other processes faster, smarter and more reliable.





# THEREFORE™ SMART CAPTURE

## HOW DOES SMART CAPTURE WORK?



Therefore™ Smart Capture saves finance team' time on data capture and supports AP function automation.

### Boost productivity with AI

Therefore™ Smart Capture increases speed and accuracy of data capture by replacing error-prone manual process with self-learning AI. It can manage high volume of invoices without a need for a complicated templates setup.

### AP Automation

Streamline payments to suppliers with automation and optimisation of the Accounts Payable process thanks to Therefore™ workflows. Enable easy tracking of the status and help to prevent duplicate and fraudulent invoices. Quickly review and approve invoices from anywhere.

### Flexibility

Easily select the required extraction level to include only the invoice header and footer or also the line items. Choose to import supplier databases to further increase capture accuracy and reliability. You can even replace the manual verification step based on the right confidence level.

### Fast ROI

Lower costs of processing invoices with solution that is managed by us in the cloud and fully integrated into your document management system to enable easy implementation and scalability. No additional hardware or software to purchase or implement.





# SECURE, DIGITAL REPOSITORY

## Privacy by design.

### **Access control & permissions:**

With the New Security Concept, attributes or roles can define users' permissions so there's no need for individual level permissions configuration. This allows for granular access control and ease of management even in complex security environments.

### **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.

### **Compliance**

Therefore™ has been audited by independent third-party experts who attest that it enables compliance with the data protection requirements for software solutions as per the EU Data Protection Regulation (EU GDPR). Therefore™ supports the GDPdU audit file requirements.





# AUTOMATE CORE BUSINESS PROCESSES

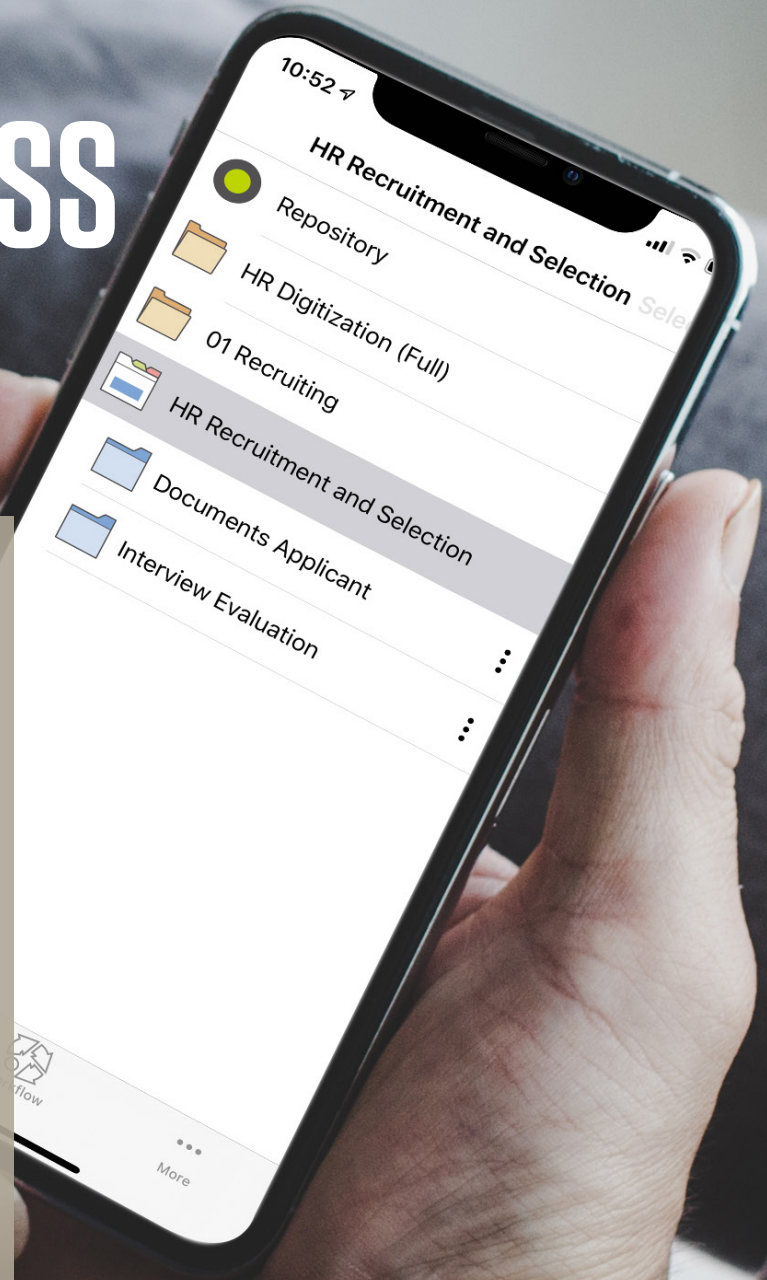
**Gain greater efficiency,  
visibility and consistency.**

## **Therefore™ Workflow**

Therefore™ automates core business processes with its powerful workflow engine. Multiple users can work simultaneously on a process, and the system automates many tasks in the background to ensure you never miss a deadline again.

## **Therefore™ Content Connector**

Automate the incoming information flow with the Content Connector which continually saves and indexes information from watched folders, email inboxes, digital signature providers, or cloud storage accounts.





# ACCESS YOUR INFORMATION ANYTIME, ANYWHERE

## **Access**

Access your information in the office, while working from home or on the go by using our Windows client, compatible web browsers or Therefore™ Go app for mobiles and tablets. With Therefore™ Anywhere you can edit documents offline and synchronise later when connected.

## **Search**

Find documents based on metadata or its contents thanks to the full text OCR, regardless of where it's saved in the system.

## **Share**

Easily share information with simple export, e-mail or share functions. With Therefore™ PORTAL you can securely and efficiently share and receive information directly with external parties.





# MANAGE INFORMATION

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

## **Collaborate**

Work together, closer by collaborating simultaneously on documents with internal or external users. You can easily track changes, assign tasks, and process information with workflows.

## **Integrate**

Seamlessly integrate your new Therefore™ system with other software in your business to enable automated data retrieval or sending information to databases as part of the Therefore workflow tasks. You can leverage:

- > Native integrations
- > Therefore™ Universal Connector
- > Therefore™ API
- > REST API calls

## **Retain**

Comply with legal and regulatory requirements regarding confidentiality and document retention.

## **Case Management**

Organise and manage related documents logically and intuitively with Therefore™ Case Management. You can group related documents for better visibility and faster retrieval, open/close cases, link them to workflows and utilise retention policies.

## **eSignature Support**

Quickly collect signatures for documents in Therefore™ with native integrations with the leading eSignature providers: AdobeSign, DocuSign, SimpleSign and YouSign. Furthermore, Therefore™ also offers a provider-agnostic interface that supports integration possibilities with other eSignature providers without extra coding.

# ANALYSE KEY PERFORMANCE INDICATORS



## **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.

## **Dashboard**

New dashboard view of the web client offers a completely customisable interface which allows users to perform and monitor many different types of activities.



# THEREFORE EDITIONS

	Workgroup Edition	Business Edition	Therefore™ Online
<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, OpenID	•	•	•
<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

	Workgroup Edition	Business Edition	Therefore™ Online
<b>Capture Integration</b>			
Therefore™ Capture Client	•	optional	optional
Therefore™ Smart Capture		optional	optional
Therefore™ MFP Application	optional	optional	optional
Kofax® Capture®	optional	optional	optional
Kofax® ShareScan®	optional	optional	
Support for TWAIN drivers	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•
<b>E-mail Archiving</b>			
Microsoft® Outlook®	•	•	•
Mailbox Monitoring	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
Microsoft Dynamics® 365		optional	optional
Microsoft® SharePoint®		optional	optional
SAP Netweaver®		optional	optional
Kofax® PDF Pro Office	•	•	•
Custom integration using Therefore™ API		Optional as part of the Therefore™ SDK, (part of Therefore™ Developer Edition)	
eSignature connectors		AdobeSign, DocuSign, YouSign, Skribble, SimpleSign, Circularo, HelloSign Scrive, Sinatura, VismaSign, PleaseSign	
<b>User Licenses</b>			
Named	•	optional	optional
Concurrent		optional	optional
Read Only		optional	optional

Certain limitations may apply. Please see the Therefore™ Installation Manual for further information. Final specifications are subject to change without notice. All company and/or product names are trademarks and/or registered trademarks of their respective manufacturers in their markets and/or countries.

For more information visit:

[www.canon-europe.com/therefore](http://www.canon-europe.com/therefore)

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