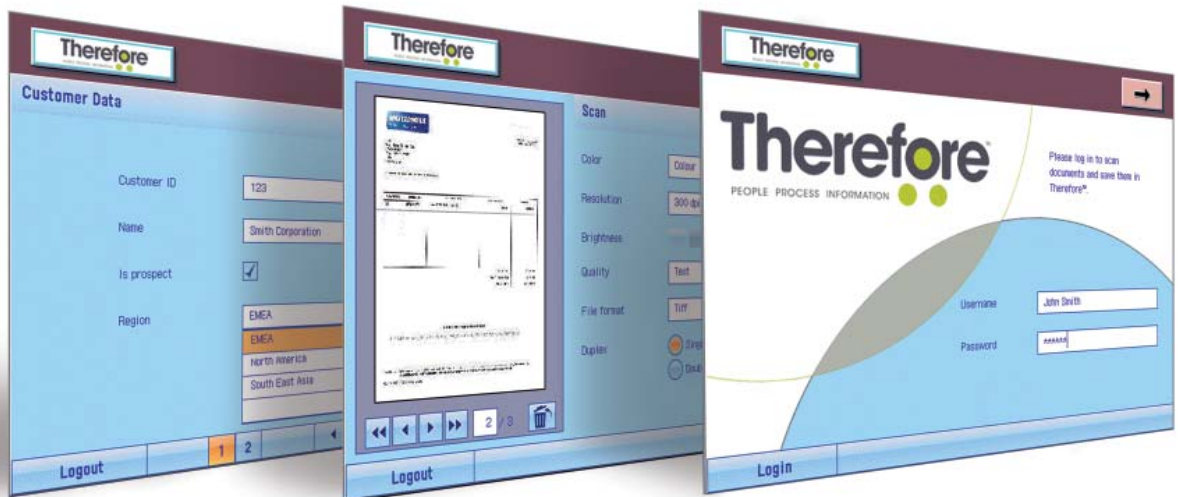


Therefore™
2009.

you can

Technical Guide



Internal Sales Tool

Canon

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An introduction.

This guide is intended to answer the question, “What is Therefore™?” as well as explaining in detail the main features and benefits.

The Technical Guide should be used to support the Sales Guide as well as the Therefore™ product brochure, to enable you to sell the solution confidently and effectively.

In the guide

In this guide you will find a one-page overview of each of the main features and benefits of Therefore™, complete with screen shots. You can also discover how the software is bundled and how the licensing works.

Why choose Therefore™?

People at work need access to information. To import and integrate. To share and compare. To store and retrieve. To distribute and print. They need it electronically and they need it now.

Therefore™ document solutions enable users to process information efficiently, economically and securely throughout their department or organisation. Which means that they can access and use the information they need to help meet business objectives.

Efficiency

No out of control document mountains. No missing or mistaken information. No sending to the wrong recipients. Just fast, efficient, document flow that gives you a productive business edge through improved customer service.

Economy

By connecting people with the information they need, Therefore™ document solutions can speed up business cycles and generate a fast return on investment. They can also scale-up in-line with business growth, saving on expensive replacement systems. More electronic document processing also means less print and lower output costs. Greater efficiency also enables resources to be reallocated from administrative tasks to core business.

Security

Using information securely is essential in today's world where fraud is becoming more commonplace. Therefore™ document solutions enable you to stay compliant with legal and industry regulations, while keeping data safe by limiting access to authorised users only. So information can flow freely through an organisation, but still be totally protected.

Therefore™ is the optimal way for forward thinking companies to capture, manage, share and store their information.

Therefore™ is completely scalable.

Therefore™ has been specifically developed to offer maximum versatility. As a totally scalable solution, input devices such as Canon scanners and MFPs can be added as necessary. All that changes is the license that the customer uses to enable the feature.

Software architecture

Therefore™ is available in three versions: **Personal Edition**, **Workgroup Edition** and **Business Edition**. But, each of these versions uses the same scalable software kernel and there is a clear upgrade path for customers to move from a Personal or Workgroup system to a Business Edition system.

Many competitive offerings have evolved through the purchase or acquisition of different software solutions for different customer types and user numbers. This has the obvious drawback that, as an organisation grows, their document management software isn't necessarily able to grow with them. Instead, an alternative solution must be sought, or expensive modifications made to the existing solution. Either way, the cost, time and training ramifications are high.

With Therefore™, entry-level systems and enterprise wide deployments work with the same software for maximum scalability.

Therefore™ operates using the Microsoft® SQL database platform. In smaller installations, the free version: Microsoft® SQL Express can be perfectly adequate for around 20 Therefore™ Business Edition users and millions of documents, and this can then be upgraded easily to Microsoft SQL Server for larger Therefore™ installations.*



*Limitations of Microsoft® SQL Express include a 4Gb database size limit and a restriction on the number of processors. For full details see www.microsoft.com. Therefore™ saves pointers in the database rather than the actual documents, so it only requires a tiny amount of database space even for large documents. This keeps performance fast however large the system grows.

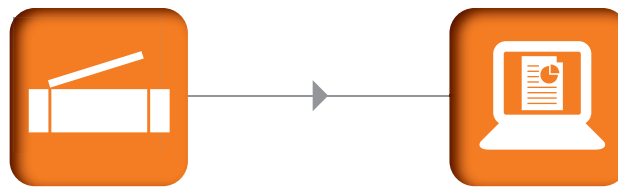
The scalable versions of Therefore™.

Therefore™ Personal Edition Stand alone archive solution

1 Named user license

1 Capture client license

No file sharing or workflow



This is a single user, stand alone archive solution. It allows scanning of paper documents and importing of Microsoft® Office and desktop files. Typical users could include the Military or Police, who need to scan sensitive documents on stand alone systems away from the network.

Since Therefore™ Personal Edition can be installed onto a laptop, it's ideal for use by Sales and Pre-sales personnel and Solution Business Consultants as a demonstration, test and training platform for the other Therefore™ Editions.

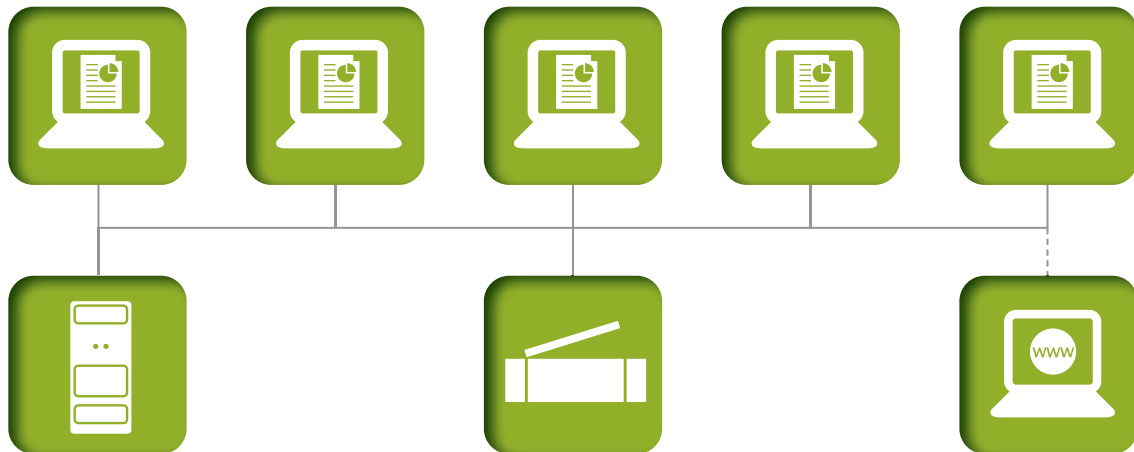
If Workgroup Edition or Business Edition features are required, NFR versions can be ordered by sending an e-mail to customerservice@therefore.net. Please state your requirements such as which Edition and how many users. A license file is then sent and the software can be downloaded from the Therefore™ extranet at www.extranet.therefore.net. Time limited versions (30 or 60 days) are available for installation at customer trial sites.

The scalable versions of Therefore™.

Therefore™ Workgroup Edition

Ideal for workgroups and departments

5 Named User licenses (5 additional user licenses can be purchased)
1 Capture client license (additional paper capture licenses can be purchased)
Web Access



Therefore™ Workgroup Edition works especially well in small companies and in departments within larger organisations. It allows scanning of paper documents and importing of all Microsoft® Office and desktop files. Documents can be archived to all common forms of electronic storage media. In addition Paper Client Capture licenses for eCopy™ ShareScan®, the Therefore™ MFP Application and Kofax Capture® can be purchased.

Any business that needs to capture, store and retrieve information quickly and securely or make paper documents instantly available 'at the desktop' can use Therefore™ Workgroup Edition.

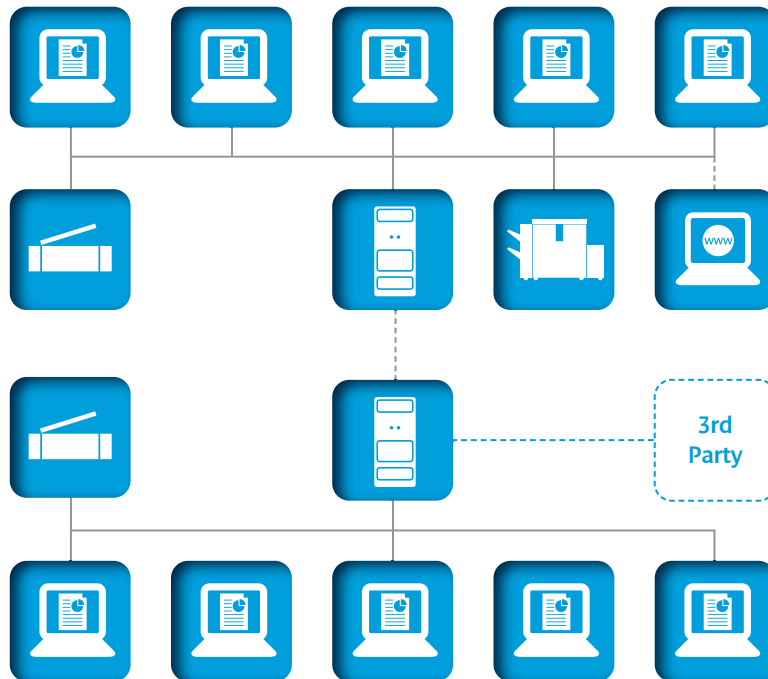
Typical target markets would be a small company, an individual team or department in a medium-sized company, or perhaps a local office of a larger company.

To give an example, a small private medical or dental practice might want to store patient records. Or a company's HR department might use Therefore™ to store employee records (such as CVs and interview notes), or an estate agency might store property details, viewing and sales records. Other users could typically be Customer Account Query operators, or Accounts Managers.

The scalable versions of Therefore™.

Therefore™ Business Edition Ideal for large organisations

Unlimited users
Unlimited Servers for decentralised system
Workflow functionality as standard
3rd Party integration connectors



This version is designed for small, medium or large organisations that need to make paper documents available 'at the desktop' to their staff, and also improve process efficiency by creating flexible information workflows to guide documents through their business. It offers unlimited server support for a true, decentralised system. This edition allows the use of all RAID and NAS media types, barcode recognition and capturing, workflow integration, COLD pool file processing, and Web access.

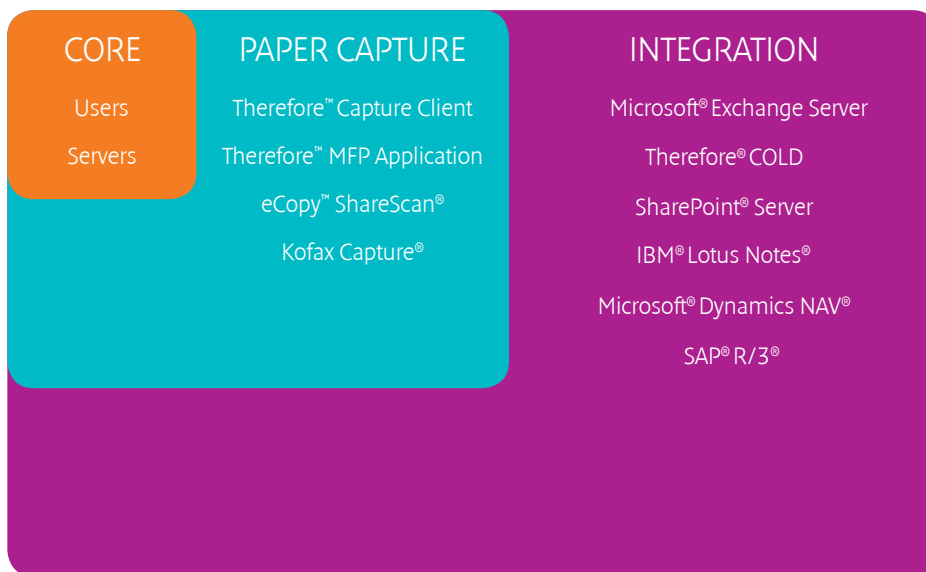
Supporting many different database servers, Therefore™ Business Edition can also 'share' data from many 3rd party packages. A typical integration option would be to use Therefore™ to store scanned images of documents that "link" to financial transaction data, controlled by some 3rd party sales or invoicing package.

Other typical users would be the national offices of worldwide companies, or government departments. For example, a National Health Service might store patient records at each major hospital, whilst a Vehicles department might wish to store vehicle tax details.

Remember, each version of Therefore™ is upgradeable to grow with your customer's business.

Therefore™ Licensing.

There are three main types of license available to expand both the size and functionality of your system.



1. Core licenses

These can be added to the Therefore™ system as needed

Named User license - Each individual who needs access to the system has their own user access license tied to their Active Directory user account.

Concurrent User license - Each user who logs-on to the system will use a license from the system pool. The license is then automatically returned when logging off.

Server licenses - Add extra servers for a decentralised system.

2. Paper Capture licenses

These allow you to connect Canon and other manufacturer's ISIS compatible hardware, such as MFPs and scanners, to Therefore™, allowing documents to be scanned into the system. A separate license is required for each hardware 'connection'.

3. Integration licenses

These Licenses are required to establish a link between Therefore™ and other 3rd party systems. Systems supported include:

- Microsoft® Exchange Server for e-mail archiving
- IBM® Lotus Notes®
- Microsoft® Office SharePoint® Server
- Microsoft® Dynamics NAV®
- SAP® R/3®
- In addition a COLD module makes the capture and indexing of text, PDF and XML spool files possible.

System components.

Therefore™ is made up of several component applications:



Navigator - The Therefore™ Navigator allows you to search for and retrieve documents saved within the Therefore™ server, as well as manage and access workflow tasks.



Viewer - The Therefore™ Viewer displays, rotates, annotates and prints documents that have been saved to Therefore™. In addition, the Viewer allows you to create new versions of a document, edit a document's index fields and view previous versions. Documents associated with applications on your PC, are opened using the native application. However, Viewer also allows you to view documents created in over 250 file formats, even if the application they were created in is not installed on your PC.



Capture Client - The Therefore™ Capture Client is used to scan documents and save them to Therefore™. The Capture Client is typically used with a document scanner, although it can be used to import documents from a hard disk, or to classify and index documents that have already been saved to Therefore™. Both Barcode and OCR recognition are supported.



Web Access - Therefore™ Web Access uses a web browser (typically Microsoft® Internet Explorer®) to search and display documents saved in Therefore™.



Solution Designer - The Therefore™ Solution Designer is the central application for the administration of Therefore™, including the creation and design of categories, keywords and workflow processes. It's also used to define security policies to restrict certain user actions when operating within the system.



Console - This administrator tool set allows monitoring of the current status and events occurring on the Therefore™ Server. For example, the Active User window displays current user status. A number of 'house keeping' tasks, such as verifying saved documents, emptying the recycle bin, and initiating the deletion of documents based on retention policies, can also be performed.



Document Loader - The Therefore™ Document Loader allows documents and index data from legacy document management systems to be imported into Therefore™.



Export Utility - The Therefore™ Export Utility is a standalone application that transfers documents in their original format, from Therefore™ to a local file system, so that they can be imported to other applications.

Therefore™ Navigator.



Navigator – The Therefore™ Navigator allows you to search, retrieve, group and sort documents saved within the Therefore™ server. It also manages workflow process tasks.

Categories and folders

Keep multiple searches open in different tabs

Fully customisable views for search results

Dynamic search means that results update as you type

Invoice No.	Invoice Date	Amount	Accounting No.	Name
C300	5/30/2009	38.72		
C334	9/15/2009	52.10		
C367	2/20/2009	38.72		
C400	5/30/2009	38.72		
C410	9/15/2009	52.10		
C460	2/20/2009	38.72		
C478	5/30/2009	38.72		
C500	9/15/2009	52.10		
C510	2/20/2009	38.72		
C520	5/30/2009	38.72		
C530	9/15/2009	52.10		
C540	2/20/2009	38.72		
C567	5/30/2009	38.72		
C569	9/15/2009	52.10		
C600	2/20/2009	38.72		
C300	5/30/2009	38.72		

Therefore 2009 – Navigator – main screen

Saved searches can be started with a double-click

Thumbnail preview

Therefore™ Viewer.



The Therefore™ **Viewer** displays, rotates, annotates and prints documents that have been saved to Therefore™. In addition, the Viewer allows you to create new versions of a document, edit a document's index fields and view previous versions. Documents associated with applications on your PC, are opened using the native application. However, Viewer also allows you to view documents created in over 250 file formats, even if the application they were created in is not installed on your PC. So imagine you receive an AutoCAD drawing, you can open it, even if you don't have the application on your PC.

Comments can be added

Editable index data

Document information

Document Details

Document Information

Document ID: 211
Version: 2
Document Size: 21 KB
Created On: 5/14/2009 5:23:55 PM
Created By: MOYAWARE\ADMINISTRATOR
Modified: 5/14/2009 5:24:39 PM
Modified By: MOYAWARE\ADMINISTRATOR

Index Data

Employee No: JL001
Name: Janet
Surname: Levin
Birthdate: 3/6/1980
ID Number: 478487634
Department: Human Resources
Job: Human resources
[Edit Index Data](#)

File Information

File Name: Company Policy.docx
File Type: Microsoft Office Word Document
Size: 15 KB

Document History

Version	User	Date	Comment
2	ADMINISTRATOR	5/14/2009 5:24:39 PM	Clause 7 changed
1	ADMINISTRATOR	5/14/2009 5:23:55 PM	Initial Check-in

Therefore Viewer - Multiple pages in a document and multiple document versions.

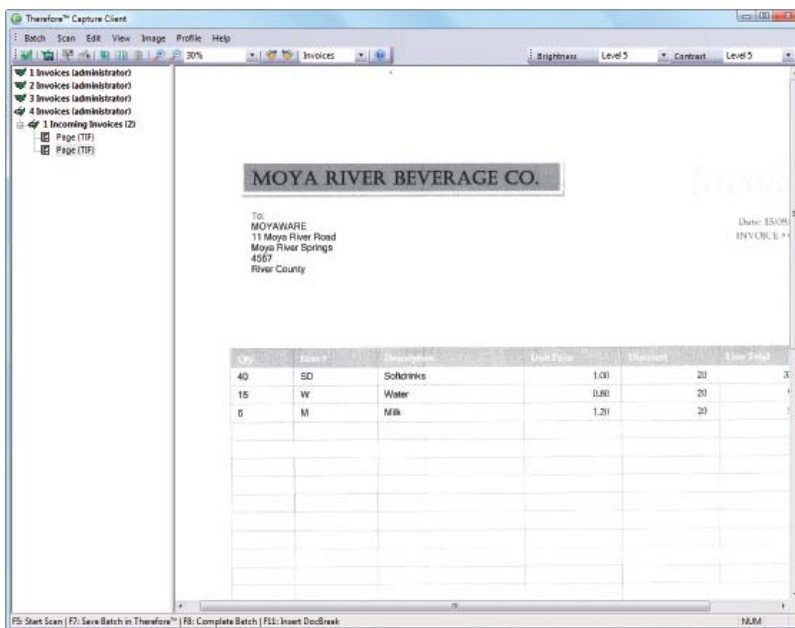
Full version history

File information

Therefore™ Document capture.



Using Therefore™ it's possible to capture all manner of documents.



Document capture screen

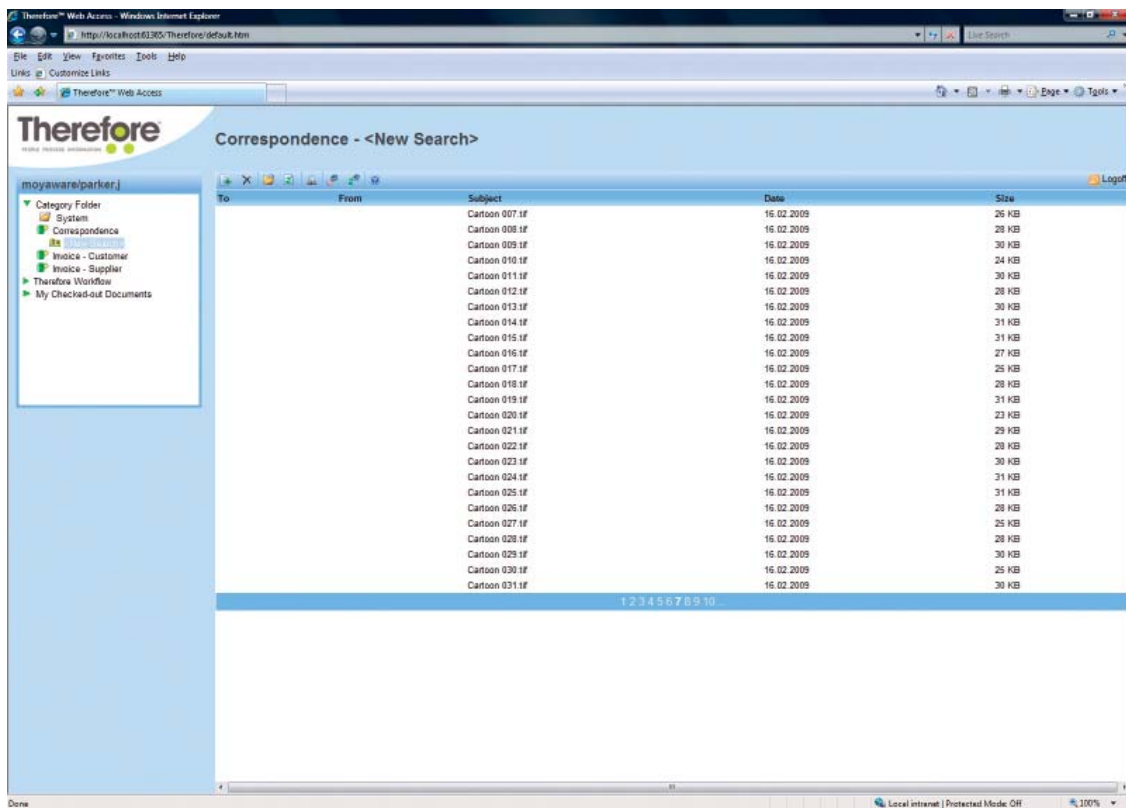
Therefore™ Capture Client – scanning, capture, indexing and storing documents

The Therefore™ Capture Client is used to scan documents and save them to Therefore™. The Capture Client is typically used with a document scanner, although it can be used to import documents from a hard disk, or to classify and index documents that have already been saved to Therefore™. Both barcode and OCR recognition are supported, and can be used for indexing documents and splitting batches.

Therefore™ over the web.



Therefore™ **Web Access** uses a web browser (Microsoft® Internet Explorer® or Mozilla® Firefox®) to search and display documents saved in the Therefore™ Document Management System.



Web Access screen

The ability to scan documents into Therefore™, or be part of a workflow process over the web, is useful for small branches or even home workers. Using a username and password over a secure link enables users to benefit from the functionality of Therefore™ from anywhere with Internet access. The Therefore™ web client allows this without any Therefore™ software installed on the PC being used.

Usability is similar to the Therefore™ Navigator and Viewer making it easy to appreciate the benefits, anytime and anywhere.

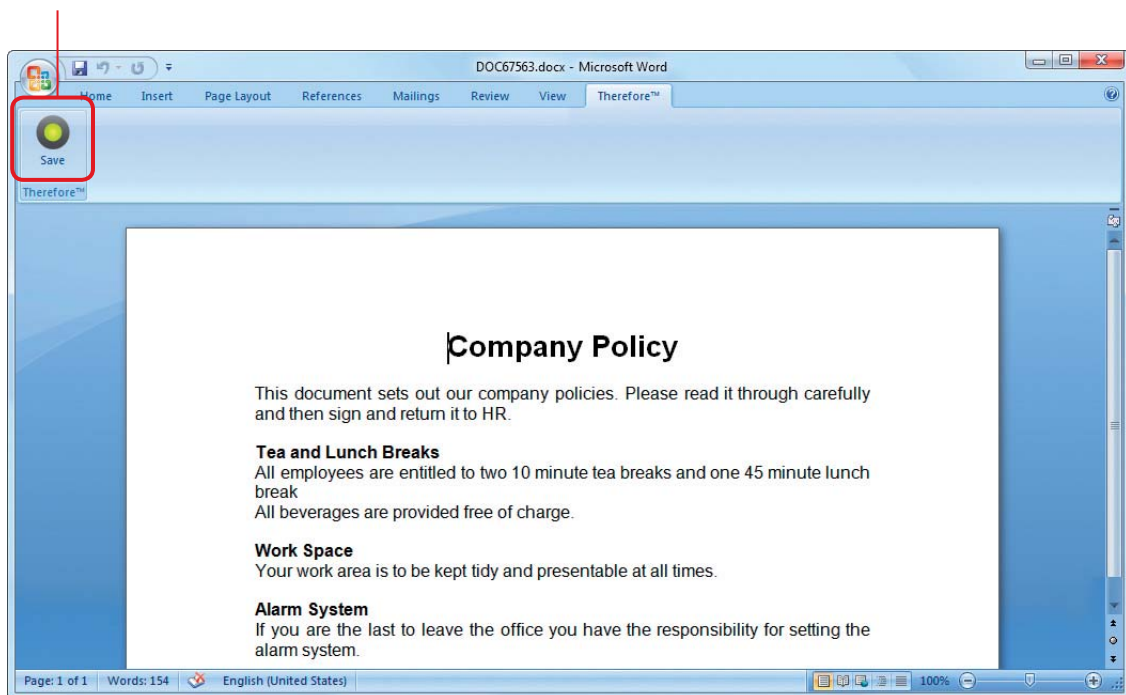
Safe and secure

To ensure data is kept secure over the Internet, the Therefore™ Web client, supports secure communication using SSL.

Using Therefore™ isn't just limited to PCs and devices in the office.

Saving documents to Therefore™ from other software applications.

“Save to Therefore™” button appears in Microsoft® Office applications such as Microsoft® Word and Microsoft® Outlook®



Microsoft® documents

Documents created in Microsoft Office applications can be saved directly into Therefore™ using the “Save to Therefore™” button which appears on the toolbar in Microsoft Office applications. When you click on this you are simply asked to categorise and tag the document; it is then saved directly into Therefore™.

Other document types

To save documents directly from Windows® Explorer or the desktop, simply right click and select Save to Therefore™.

Using Therefore™ to manage your documents means there's no need for documents to be stored in multiple locations. Time wasting caused by carrying out work on the wrong version of a document is also eradicated.

Therefore™ Workflow Functionality.

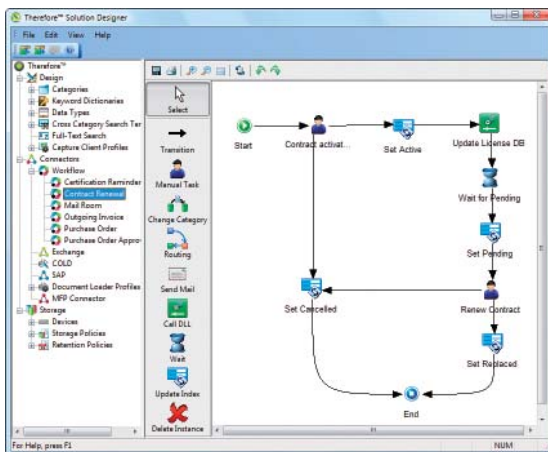


When a piece of paper travels around the office, who decides which route it takes, how long the process takes, and what tasks are performed? It's often difficult to know where the original document is and what the impact is when it gets held up somewhere in the process.

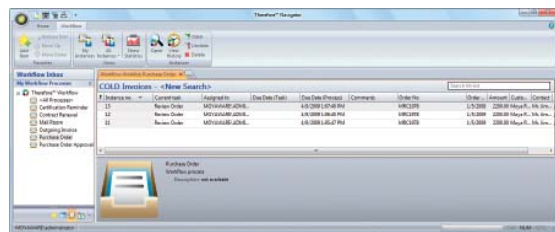
Therefore™ Integrated Workflow helps you control all of these variables, allowing business processes to be optimised.

Not only does this save time and money, it helps heighten security and transparency of the process.

Therefore™ Business Edition has workflow functionality and a drag and drop graphical workflow designer, which makes it simple to setup and modify.



Workflow screen



Each user has a clear view of all the tasks that are assigned to them within the overall process.

Task delegation

Users can be automatically notified via e-mail with a direct link to the task which they are being requested to carry out. Clicking on the e-mail link will directly open the workflow task dialogue, and from here it is possible to view the document in the Therefore™ Viewer, add comments, and append documents, as well as complete, delegate or reject the task.

Therefore™ Integrated Workflow provides process visibility, putting you firmly in control.

Therefore™ Document Retention.



One of the major drivers for change in document management behaviours is legal compliance and the need of organisations to adopt robust document retention policies. Wrongful destruction of documents can lead to penalties in both civil and criminal cases.

On the other hand, data protection laws state that some personal information should be destroyed after it has been used.

Therefore™ allows documents to be permanently deleted after a specified retention period, and allows old versions of document to be purged from the server.

Retention Policy

Retention Policy Name: HR Documents

Delete old documents

Delete documents after 6 months

measured from

date of creation

date of last modification

date stored in index data field

EndDate

Purge old versions of documents

Keep the latest 0 versions

Erase documents from media

OK Cancel

Retention Policy screen

In the Therefore™ Console the administrator can run a count process which list all documents that meet the retention criteria. The administrator has the ability to manually edit this list. Once the deletion is confirmed, the documents are moved into a queue for permanent deletion and moved files are documented in a log file.

Therefore™ allows documents to be permanently deleted after a specified period.

Integration.

Therefore™ enables seamless integration with Canon MFPs.

Therefore™ MFP Application

The Therefore™ MFP Application is a MEAP application, which integrates Canon iR devices directly with the Therefore™ system. Users scan documents at the device and save them directly to Therefore™, together with all the necessary index data. The classification, indexing and storage can occur directly on the display on the MFP - your PC does not even need to be on!



The Therefore™ MFP Application also supports a USB keyboard on the MFP, so users can enter index data easily.

Login screen

Scan preview

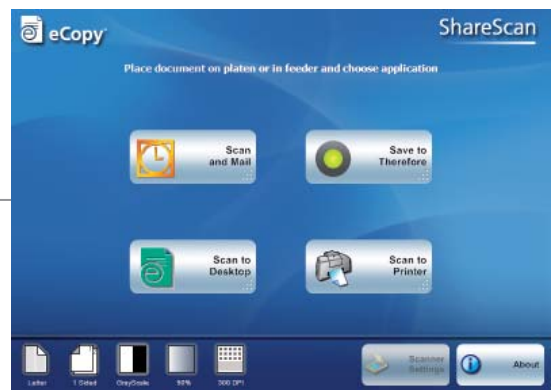
Index and save

Integration eCopy™ ShareScan®.

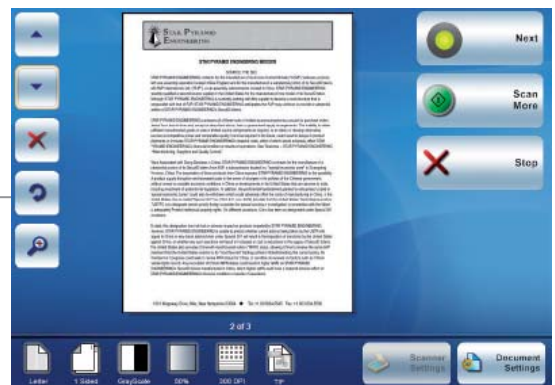
For users of eCopy™ the Therefore™ connector for eCopy™ ShareScan®, allows storing of documents straight from an MFP to Therefore™. eCopy™ also allows the sending of documents to multiple destinations. Integration with eCopy™ Desktop™ allows documents to be annotated and then saved to Therefore™, using the Save to Therefore™ button.



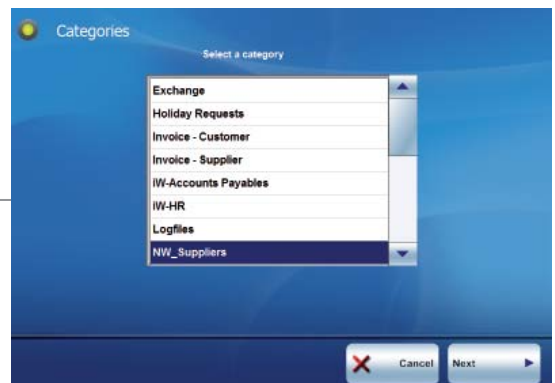
Documents can be scanned, indexed and saved directly on the MFP device.



Main screen



Scan preview



Select a category

Integration.

Therefore™ integrates with SAP® R/3®, Microsoft® Dynamics NAV®, Microsoft SharePoint and COLD mainframes.

Seamless integration with Microsoft Dynamics NAV

The Therefore™ Microsoft Dynamics NAV Connector allows users to interact seamlessly between Therefore and Microsoft® Dynamics NAV®. Therefore™ in conjunction with Microsoft® Dynamics NAV® allows users a real-time view of the entire document flow throughout the organization with easy access to all data and documents produced. The end result is a complete and customisable business management solution that will save time and money.

While using Microsoft® Dynamics NAV®, users can:

- Scan documents
- Import documents
- Automatically index documents in Therefore™ from fields in Microsoft® Dynamics NAV®
- Retrieve documents
- Print documents
- Distribute documents
- View Documents

Seamless integration with Microsoft® SharePoint® 2007

SharePoint customers can benefit from seamless integration with Therefore™, improving the capture and management of business-critical paper based information. Therefore™ sits beneath SharePoint to formalise the indexing and storage of documents. This means customers continue to enjoy the user interface and functionality of SharePoint, but gain the additional benefits of effective document capture, storage and integration provided by Therefore™. It also reduces the size of the Sharepoint database, which allows it to keep running at top speed, irrespective of data volume.

Therefore™ COLD

Therefore™ COLD processes print lists and spool files (ASCII text, binary, XML and PDF) quickly and automatically from mainframe systems or report generators.

Therefore™ API

Therefore™ API allows integration with 3rd party software using the Therefore™ SDK.

SAP® R/3® Integration

Therefore™ provides central management for all information, and simultaneously links the SAP® processes with their documents.

Incoming documents

Incoming paper documents and electronic documents can be stored in Therefore™ directly from the SAP® user interface. All Therefore™ applications support all SAP® barcode functions and are completely embedded into the storage scenarios of SAP®. Therefore™ is able to capture the indexes of documents directly from the SAP® processes.

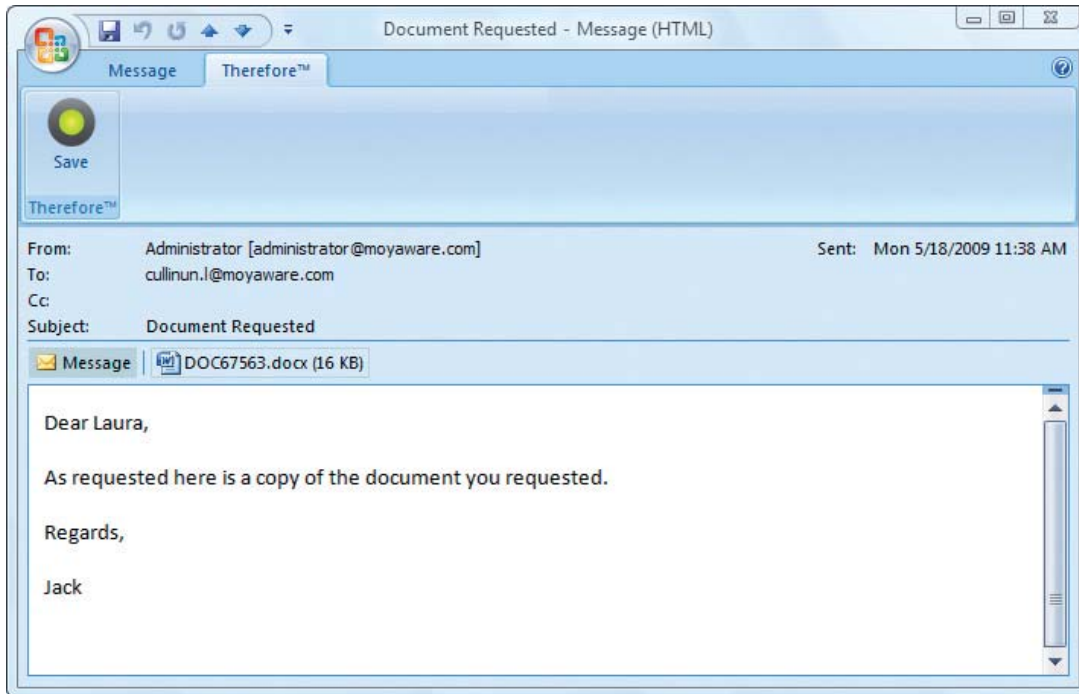
Outgoing documents

For documents, such as customer-related output or spool files, Therefore™ provides automated storage tasks. All SAP® reorganisation data can be stored into Therefore™. For cost effective release of the SAP® data storages, this data can then be restored to SAP® at any time.

Retrieving documents directly out of SAP®

Complete integration means that all documents managed by Therefore™ can be retrieved and viewed directly from the SAP® applications. The documents can be displayed in the Therefore™ applications or in SAP® internal viewers.

E-mail archiving.



In addition to automatic archiving, e-mails can be manually saved and indexed to associate them with other documents

With Therefore™ all hard copies, electronic documents and e-mails relating to a particular job or project can be saved and archived in a structured format. This means all e-mail correspondence is available to access and review along with the documents and associated communication on any topic. This is particularly useful since a saved document often tells only half of a story. The other half is told by all the background correspondence.

How it works: Microsoft® Exchange Server

Automatically indexed according to age, size, receiver, and status; e-mails and attachments are automatically stored in the Therefore™ document management structure, with no action required by the user. E-mails and associated communication are handled in exactly the same way as always using Microsoft Outlook®.

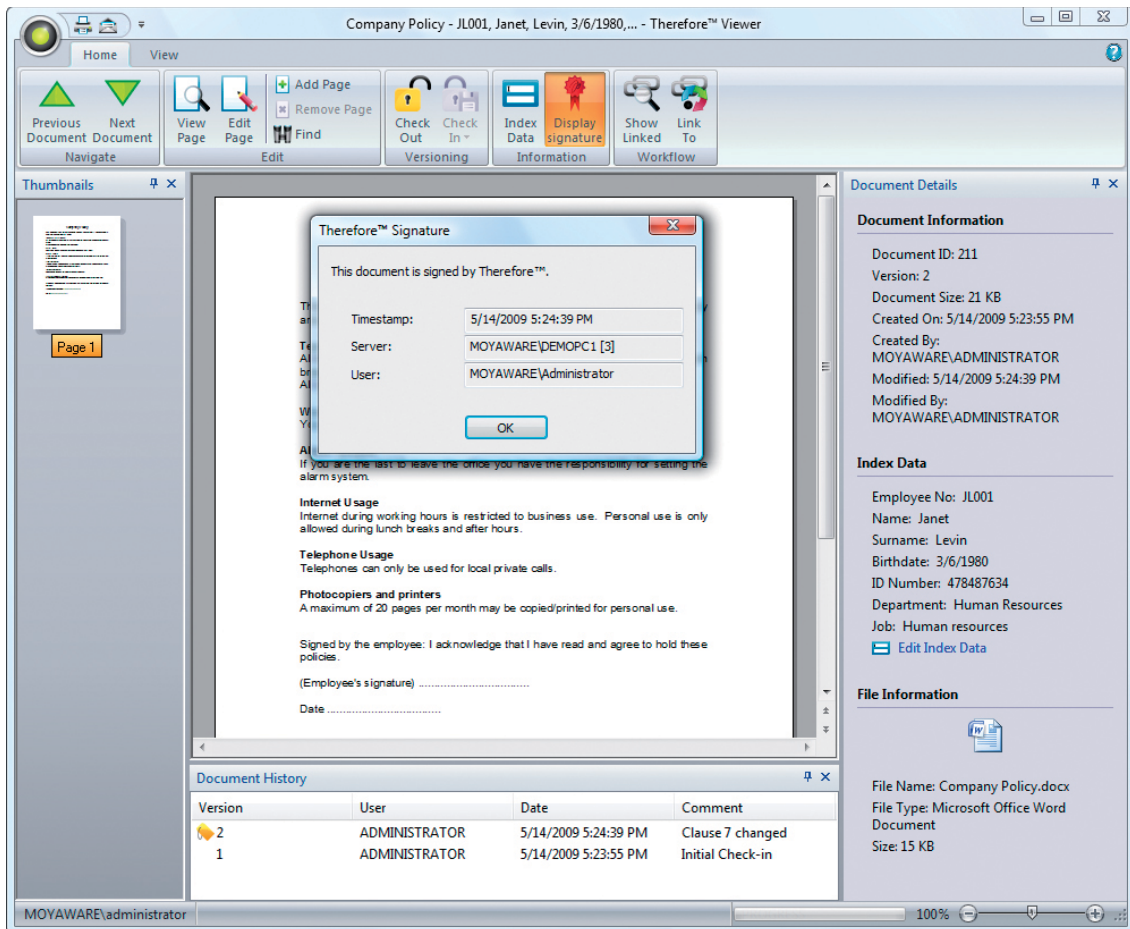
In addition, users can manually save important e-mails to Therefore™ and apply their own search criteria.

How it works: IBM® Lotus Notes®

IBM Lotus Notes users can manually store e-mails and attachments within Therefore™. The indexes of the messages can either be provided automatically or set manually by the user.

Not only does Therefore™ file your scanned documents and electronic files, it even archives your e-mails too.

Security.



Digital Signatures

A document's content and origin can only be guaranteed by forgery-secure storage. A digital signature, contained on every document in the Therefore™ server, secures the authenticity of all information. During the retrieval of every document, the Therefore™ server verifies the signature to ensure the user is receiving valid information.

Automated examination of the authenticity of documents

Every retrieval of a Therefore™ document prompts verification of its public key. Information is retrieved only if the certifying authority (CA) of the Therefore™ server verifies the digital signature and if the document is unchanged since it was stored in the system.

How it works

The Therefore™ server handles digital RSA keypairs using industry-standardised methods. The private key is used to sign the documents and is secured by the operating system crypt API.

The public key is available over the Therefore™ system architecture, verifying the authenticity of the information should an audit trail be required.

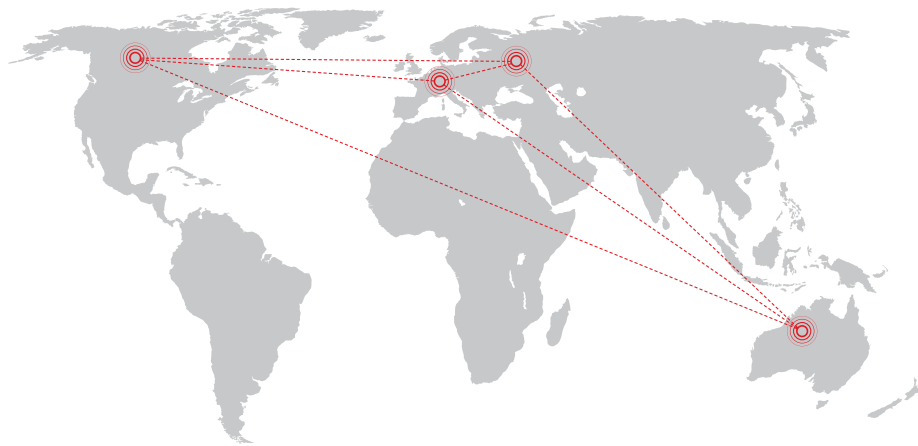
Access Control

Access to the Therefore™ system and documents is totally controlled by using three different levels of security.

1. The main access to the solution is via Microsoft® Windows Active Directory system. This controls the access that users have to their documents and storage areas without the need of a second user name and password. It also makes the IT task easier to manage because rights can be assigned to either the individual or groups of users.
2. Therefore™ security features allow the administrator to remove options from specific groups of users. This is typically used to stop users annotating or printing documents.
3. The Rights server is a built in option that allows the use of an external table. The main use of this is to allow varying levels of access within a group. This system makes use of the active directory table first and then allows an administrator to give access to a specific file or document that wouldn't normally be allowed.

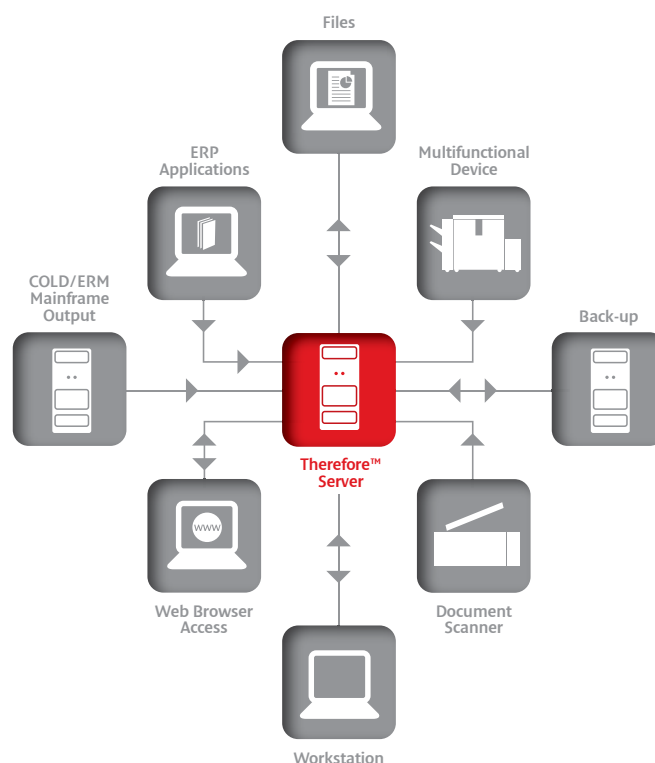
Document management for decentralised organisations.

Therefore™ Business Edition allows unlimited additional servers to be added, providing a secure decentralised network and database structure.



Therefore™ supports all relevant industry standards

Therefore™ Server supports true 64-bit processing for incredible speed and data throughput. The modular construction of Therefore™ also allows it to be truly flexible when integrating with existing hardware and software.



Specifications: Therefore™

	Personal Edition One user	Workgroup Edition 5 - 10 users	Business Edition 5 - Unlimited users
Server Windows® XP, Vista® 32 bit Windows Server® 2003 Windows Server® 2008 Windows Server® 2003 64 bit Windows Server® 2008 64 bit Multi-servers in different locations	• - - - - -	- • • • • -	- • • • • • Optional
Client Windows XP, Vista® 32 bit Microsoft® IE 6 and higher (Web Access) Mozilla® Firefox® 1.04 and higher (Web Access) Multi-language support Customisable skins (Navigator & Viewer)	• - - • •	• • • • •	• • • • •
Integrated workflow Therefore™ document workflow GUI drag & drop workflow designer	- -	- -	• •
Security & permissions Windows® integrated security Therefore™ rights server	- -	• •	• •
Document administration Version control Digital signatures Annotations (TIFF documents) Retention period management (ILM)	• • • -	• • • •	• • • •
Document formats Non-proprietary file format Single/multi-page TIFF PDF, Searchable PDF and PDF/A Original format (electronic documents)	• • • •	• • • •	• • • •
Database Microsoft® SQL Server 2005/2008 Microsoft® SQL Server Express Edition¹ ORACLE® 9 or later IBM DB2® 8 or later	• • - -	• • - -	• • • •
Storage Common types (e.g. DAS,NAS,SAN & local RAID)	-	•	•
Integrated scanning Therefore™ Capture Client (barcode/OCR)	•	•	Optional
Additional capture integration Kofax® Capture® Therefore™ MFP Application eCopy™ ShareScan® eCopy™ Desktop™ Batch document loading	- - - - -	Optional Optional Optional • •	Optional Optional Optional • •
Spoolfile parsing (COLD) AScii text, plain text, XML & PDF			Optional
E-mail archiving Microsoft® Outlook® Microsoft® Exchange Server IBM® Lotus Notes®	• - -	• - -	• Optional Optional
Third party integration Microsoft® Office Windows® Explorer Microsoft® Dynamics® NAV SAP® R/3® Microsoft® SharePoint® Server 2007	• • - - -	• • - - -	• • Optional Optional Optional
Plug-ins from third party providers PlanetPress® IRIS Powerscan™	- -	Optional Optional	Optional Optional
Custom integration Therefore™ API	Optional	Optional	Optional

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IBM, DB2 and Lotus Notes are registered trademarks of International Business Machines Corporation in the United States, other countries, or both.
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