

## TAKE THE NEXT STEP

THEREFORE 2016 NEW FEATURES BROCHURE

## KEEP YOUR BUSINESS ON THE CUTTING EDGE WITH THEREFORE™ 2016

- Smarter data collection
- Hassle-free electronic signature gathering
- Real-time interactive dashboards of vital organizational data



# COLLECT MORE DATA WITH THEREFORE™ FORMS

In Therefore™, you'll be able to design customized forms using an expanded category designer. You can add images or logos and change colors and fonts to fit your company's brand. Users will even be able to attach additional documents when submitting the form. They can be used either internally or hosted externally on a website. By providing a familiar look and feel as well as a structured format, Therefore™ Forms offer a flexible, intuitive way to input, process, and analyze data and documents.

## WHY FORMS?

The concept for form functionality arises from several different market needs. In essence, Forms can provide a way to get validated data into Therefore™ to take advantage of its information workflow and analytics tools. For example, hosted forms can automate the collection and saving of external data into Therefore™ without any additional input. By designing highly customized forms directly in Therefore™, administrators save time by not needing to configure other tools for passing form data to the archive, and users benefit from more efficient data input.

## BENEFIT OF FORMS

By using Forms, valuable data can be collected in a secure, traceable manner and automatically indexed, archived, and incorporated into downstream workflows and analyses. Use cases include internal procurement and purchase request, and external customer surveys.

Send to Therefore™ - Internal Procurement

Save Cancel Attachments (0)

**marnay tutoring**

## PURCHASE REQUEST

**Purchaser Information**

Employee ID

Name

Department

E-mail

Supervisor

Sup. E-mail

**Vendor Information**

Vendor ID

Vendor

Address

City

Postal Code

Phone

**Line Items**

Item	Quantity	Unit Price
There are no items to show.		

**Additional Information**

# FAST-TRACK YOUR CONTRACT MANAGEMENT WITH ELECTRONIC SIGNATURES

Whether a signature is required to seal a final document version or certify the legal signing process of a contract between two parties, replacing paper signatures with electronic ones is the way of the future. Therefore™ 2016 will extend e-signing capabilities by initiating integration with digital transaction management providers, thus granting the infrastructure to manage complete signing processes online. The first integration will be with a key provider, DocuSign®.

## WHY E-SIGNATURES?

Market trends indicate that best-in-class companies are increasingly incorporating e-signatures into their business practices, especially when it comes to managing contracts with external parties.\* This trend is also supported by various regulatory policy changes that recognize the validity of e-signatures for legally binding documents.\*\* By using e-signatures, companies may save an average of three days during the approval process, and 68% of businesses adopting e-signatures may see a return on investment within a 12-month budget cycle.\* Added gains include the decrease in costs and environmental benefits that come with lower paper consumption and improved customer satisfaction and employee productivity.

## BENEFIT OF E-SIGNATURES

By using the Therefore™ integration with DocuSign®, companies are able to gather legally binding signatures in a fast, reliable manner, which helps cut costs and save time. This is reflected by increases in employee productivity, enhancements in customer satisfaction, and improvements in Key Performance Indicators (KPIs), such as shorter sales cycles and higher conversion rates.



\* "Digital Signatures: Ready for Production," AIIM 2014.

\*\* See EU directive 1999/93/EC: "Community Framework for Electronic Signatures" and California's Civil Code Section 1633.1-1633.17: "Uniform Electronic Transactions Act"



## MAKE YOUR DATA COME ALIVE WITH POWER BI MICROSOFT® INTEGRATION

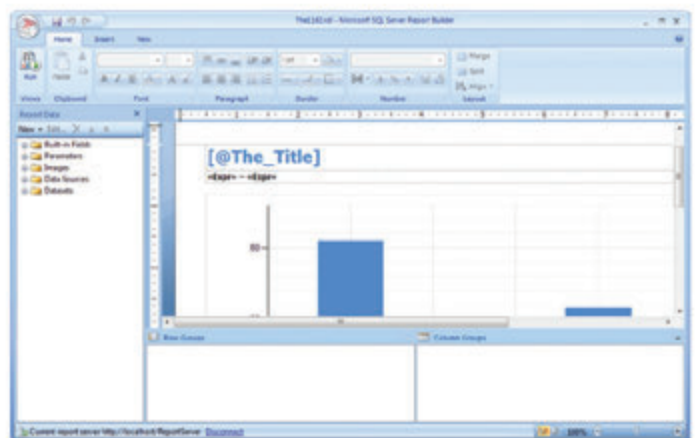
Since 2015, Therefore™ software has come with a built-in Business Analytics tool for gathering and reporting data saved in the archive, turning it into an asset for making critical business decisions. The new Microsoft® Power BI integration enhances the analytic capabilities of Therefore™ by providing a real-time, interactive dashboard of the company's data that's simple to configure and use.

### WHY POWER BI?

Power Bi is a data gathering and analysis platform created by Microsoft, that provides rich, dynamic visualizations of gathered data and a modern, reactive user interface. Using Therefore™ Power BI integration, users can create an analytic dashboard, allowing them to intuitively adjust reports on the fly and structure their data in ways that make sense to them. Managers can make the most of their information from a single view of real-time data in the Therefore™ system. Mobile access through the Power BI app means users can take their data with them and never be left in the dark.

### BENEFIT OF POWER BI

With this functionality, users can effortlessly gather and view their data. Businesses can maintain a clear overview of their KPIs and immediately see which areas call for improvement. The previously released SQL-based Business Analytics feature can be used to generate monthly reports for audit purposes, while the Power BI integration gives instantaneous, uncomplicated access to the data — any time, anywhere.





## ADDITIONAL ENHANCEMENTS TO HELP STREAMLINE PROCESSES

With PDF/A-3, you can embed various file types as attachments within a PDF/A-3 file. A key benefit for information management is the ability to embed XML files for automatic document processing within the packaging of a user-friendly PDF/A document. Starting with Therefore™ 2016, it will be possible to extract XML attachments from PDF/A-3 files using the Therefore™ Content Connector. Based on the XML data, the document can be auto-classified, indexed, and saved to Therefore™, and downstream workflows can be used to further process the document automatically.

### WHY PDF/A-3?

Support for PDF/A-3 opens doors to many possibilities in document processing and digital customer-vendor communication. This saves costs in printing and postage, eliminates errors due to manual indexing, reduces the need for paper storage, and results in faster processing and payment. The standard is already being used in the financial sector to automatically process invoices, using a uniform XML schema.

### EXPANDED OPTIONS IN THE CLOUD

Starting in Therefore™ 2016, the Content Connector will be available as a service for Therefore™ Online customers. This feature will provide mailbox monitoring and file processing to allow customers to upload documents to an input folder via secure FTP. Additionally, signature monitoring as part of the DocuSign® integration will be possible.

### THAT'S NOT ALL!

The user interface now has a more modern look and feel, expanded category designer that allows index dialogs to be formatted with color fonts and logos, and a number of other usability enhancements.

Therefore	Personal Edition One user	Workgroup Edition Unlimited Users	Essentials Edition Unlimited Users	Enterprise Edition Unlimited Users	Therefore® Online Unlimited Users
<b>Server/Database/Storage</b>					
Windows® Server 32/64-bit*	•	•	•	•	Server infrastruc- ture provided as part of service
Support for Multiple Servers				•	
Microsoft® SQL Server*	•	•	•	•	
Oracle				•	
IBM® DB2®*				•	
DAS, NAS, San and local RAID, NetApp® SnapLock		•	•	•	
<b>Therefore™ Clients</b>					
Navigator, Viewer, and Case Manager*	•	•	•	•	•
Web Access (Web Navigator and Viewer)*		•	•	•	•
Gadget (Web and Installed)*	•	•	•	•	•
Mobile App (Tablet, Phone)*		•	•	•	•
Therefore™ Portal (Unlimited Read Only External Access)				optional	optional
<b>Productivity Tools</b>					
Business Analytics	•	•	•	•	•
Therefore™ Workflow			•	•	•
GUI Drag and Drop Workflow Designer			•	•	•
Therefore™ Tasks		•	•	•	•
<b>Security and Permissions</b>					
Windows® Local Users and Groups	•	•	•	•	
Active Directory®	•	•	•	•	
Therefore™ Internal Users	•	•	•	•	•
LDAP/SAMBA support		•	•	•	
<b>Document Administration</b>					
Information Lifecycle Management	•	•	•	•	•
Audit Trail	•	•	•	•	•
<b>Capture Integration</b>					
Therefore™ Capture Client (Barcode/OCR)	•	•	•	optional	optional
Therefore™ MFP Application	optional	optional	optional	optional	optional
Kofax® Capture® and VRS		optional	optional	optional	optional
eCopy® ShareScan®		optional	optional	optional	optional
Support for ISIS, TWAIN and Kofax drivers	•	•	•	•	•
Scan Formats TIFF, PDF, PDF/A	•	•	•	•	•
<b>Electronic Document Import</b>					
Therefore™ PDF Printer	•	•	•	•	•
Therefore™ Document Loader	•	•	•	•	•
Therefore™ Content Connector		optional	optional	optional	optional
<b>Email Archiving</b>					
Microsoft® Outlook®	•	•	•	•	•
Mailbox Monitoring		optional	optional	optional	optional
Microsoft® Exchange Server				optional	
IBM® Lotus Notes®				optional	
<b>Additional Third-Party Integration</b>					
Integration with External Databases	•	•	•	•	•
Microsoft® Office	•	•	•	•	•
Windows® Explorer	•	•	•	•	•
Third-party applications using Universal Connector*		optional	optional	optional	optional
Microsoft Dynamics® NAV*				optional	
Microsoft® SharePoint®*				optional	
SAP Netweaver®				optional	
eCopy® PDF Pro Office	•	•	•	•	•
Custom Integration Using Therefore API	Optional as part of the Therefore™ SDK, purchased with a Therefore Developer Edition*				
<b>Plug-Ins from Third-Party Providers</b>					
Objectif Lune PlanetPress	optional	optional	optional	optional	optional
uniFLOW Capture	optional	optional	optional	optional	optional
All Document Capture Solutions by I.R.I.S.	optional	optional	optional	optional	optional
<b>User Licenses</b>					
Named		optional	optional	optional	optional
Concurrent	•	optional	optional	optional	optional
Read-Only				optional	optional



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