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VERSION: 2020 - 01

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# 1. Introduction

This document contains practical information for those involved in the process of selling, planning, and installing third-party Therefore™ connectors.

Topics covered include:

- Functional information on each connector
- What to do before the sale
- Estimated time requirements
- How to prepare for the installation
- Support provided by Therefore Corporation
- Specific instructions for integrators

This document does NOT include the following type of information:

- Pre-sales or sales advice/training
- Marketing information on the connectors
- Technical documentation on the connectors (external links to the documentation are provided throughout the document)

## 1.1 Before the Sale

It's important to understand the customer's wishes and requirements when the opportunity to sell a Therefore™ connector is present. To ensure that the sale, installation, and productive operation of the connector leaves the customer satisfied, it is necessary to have a clear idea of what the customer wants to do with the connector, or the problem they wish to solve. Examples of this include:

- The customer wants to link documents saved in Therefore™ to Dynamics NAV objects
- The customer wants to save incoming invoices in Therefore™ and book them in SAP, or link Therefore™ documents to SAP objects
- The customer wants to migrate documents from their SharePoint system to Therefore™ and still retrieve them from SharePoint
- The customer wants to save a copy of all mail on their Exchange server to Therefore™

Once the use case for the connector has been clearly outlined, it is recommended to contact the Therefore Pre-Sales Team at [presales@therefore.net](mailto:presales@therefore.net) for a consultation on the feasibility of the project. When contacting the Pre-Sales Team, make sure to include at least the following information:

- Therefore™ Edition
- Third-party system specs (version number or any other relevant details)
- How the customer is using (or plans to use) Therefore™
- How the customer is using (or plans to use) the third-party system
- The exact scenario/use case for how the connector should be used; specifically, explain the issue that should be solved

## 2. Therefore™ Connector for Microsoft Dynamics NAV

### 2.1 Functional Specifications

The Therefore™ connector for Microsoft® Dynamics NAV allows parallel usage of Therefore™ and the core functions of NAV such as the document system, as well as credit and debit management. Synchronization works in both directions. Therefore™ documents are incorporated in the NAV data structure, just as NAV documents are automatically archived in the Therefore™ system. Synchronization of data runs via the NAV Application Server (NAS) and, depending on your requirements, can be set to manual or automatic synchronization. The connector extends Microsoft Dynamics NAV to allow direct call-up of the corresponding areas (credit and debit management, incoming and outgoing invoices, Navigate) in the Therefore™ Viewer, as well as the Therefore™ Navigator. In addition to this, linked Therefore™ documents can be opened directly from NAV. The interface can be adapted and extended to suit client needs.

System Requirements	
Microsoft Dynamics NAV	2013 or later
Therefore™ version	2015 or later (Business or Enterprise Editions) <sup>1</sup>



<sup>1</sup>Some Therefore™ editions are region-specific. Check your local Therefore™ documentation for more details.

### 2.2 Estimated Time Required

This section gives an estimate on the amount of time required to implement this connector. These estimates are based on experience with standard implementations and use case scenarios. It should be taken into account that more complex installations will require more time than the estimates given below.

Party	Estimated Time	Notes
System Integrator	2 to 3 days	The integrator handling the implementation should read the <a href="#">pertinent documentation</a> for the Therefore™ connector to give a more precise estimate of the time required from their side.
Therefore™ Support	1 to 2 days <a href="#">RIAS</a>	See detailed information in <a href="#">Installation Preparation</a>
Canon	--	It is suggested that a Canon representative be present during the installation to act as the intermediary between Therefore™ and the integrator. If possible, it's also recommended for a Canon technician to observe the implementation to get familiar with the process through knowledge transfer.

## 2.3 Installation Preparation

Before the Therefore™ connector can be implemented/installed, it is necessary to book time for the system integrator to prepare the Dynamics NAV system from their side.

If assistance from Therefore Support is required to implement the Therefore™ side of the connector, an appointment must be booked ahead of time. For the Therefore™ Connector for Microsoft Dynamics NAV, it is recommended to book an appointment with Therefore Support at least **10 business days** before the planned implementation date.

Furthermore, the implementation of this connector requires the integrator partner to be added to a list of authorized partners from the Therefore side.

1. The integrator's VOICE Account Number and the country in which it is registered must be sent to Therefore Support so it can be added to the list. This registration does not require a purchase of the connector, so the details can even be sent before the sale is made during an evaluation or scoping period to allow the integrator access to the connector for demo or testing purposes. These details should be sent as early as possible.
2. Once the integrator is added to the list, the integrator can download an updated license file from Microsoft, which allows the Therefore™ connector to be added to the Dynamics NAV system.

## 2.4 Support

Documentation for the Therefore™ Connector for Microsoft Dynamics NAV is available online.

- Administrator documentation: [http://therefore.net/nav\\_admin\\_doc](http://therefore.net/nav_admin_doc)
- Integrator documentation: [http://therefore.net/nav\\_int\\_doc](http://therefore.net/nav_int_doc)

Technical support is available from Therefore Corporation to support the implementation of connectors. Dedicated support for such installations is provided as part of the [RIAS](#) service (Remote Installation Assistance and Support). This paid service is available in half-day or whole-day increments and consists of communication through electronic means, normally using collaborative platforms such as Webex or TeamViewer. Thus, internet access must be available at the implementation site to receive live support.

Implementation support, including RIAS, must be booked well in advance of the implementation, according to the guidelines for this connector. Support can be booked by contacting the Therefore Support Team at [support@therefore.net](mailto:support@therefore.net).

## 2.5 Instructions for Integrators

To prepare the Dynamics NAV system to integrate with the Therefore™ connector, the integrator must install the FOB files for the correct NAV version. These files can be downloaded from the Therefore™ FTP; thus, it is recommended that the responsible Canon representative download and provide the files to the integrator partner.

The integrator should follow the integrator documentation listed on the [Support](#) page to merge the required objects into the NAV customer database.

## 3. Therefore™ Connector for SAP NetWeaver

### 3.1 Functional Specifications

The Therefore™ Connector for SAP NetWeaver supports the following scenarios.

#### Storage of Incoming Documents

Incoming documents can be saved directly from the SAPGUI for Windows® into Therefore™. The Therefore™ connector supports SAP NetWeaver® barcode, SAP® Business Workflow/WebFlow and manual storage.

#### Storage of Outgoing Documents

Outgoing documents (customer related documents) can be stored into the Therefore™ categories.

#### Storage of Print Lists

SAP Netweaver® Print Lists can be stored to Therefore™

#### Storage of Archive Files

In addition SAP NetWeaver® Archive files can be stored into Therefore™ for cost-effective data storage. This data can be restored at any time.

#### Workflow Integration

New business objects can be created in SAP (parked invoices) and Therefore™ documents can be linked to SAP objects using a workflow DLL.

#### Viewing of documents

Documents stored in Therefore™ can be retrieved in the SAPGUI once they have been linked to an SAP object. The presentation of the documents can be configured for each document type. Documents can be viewed using the Therefore™ Viewer or with the internal document viewers.

System Requirements	
SAP	All SAP systems that support ArchiveLink (BC-AL)
Therefore™ version	2015 Update 2 or later (Business or Enterprise Editions) <sup>1</sup>

More detailed system requirements can be found in the [Support](#) section of this document.



- SAP Business One is NOT supported by the Therefore™ Connector.

<sup>1</sup>Some Therefore™ editions are region-specific. Check your local Therefore™ documentation for more details.



## 3.2 Estimated Time Required

This section gives an estimate on the amount of time required to implement this connector. These estimates are based on experience with standard implementations and use case scenarios. It should be taken into account that more complex installations will require more time than the estimates given below.

Party	Estimated Time	Notes
System Integrator	1 to 2 days	The integrator handling the implementation should read the <a href="#">pertinent documentation</a> for the Therefore™ connector to give a more precise estimate of the time required from their side.
Therefore™ Support	1 to 2 days <a href="#">RIAS</a>	See detailed information in <a href="#">Installation Preparation</a>
Canon	--	It is suggested that a Canon representative be present during the installation to act as the intermediary between Therefore™ and the integrator. If possible, it's also recommended for a Canon technician to observe the implementation to get familiar with the process through knowledge transfer.

## 3.3 Installation Preparation

Before the Therefore™ connector can be implemented/installed, it is necessary to book time for the system integrator to prepare the SAP system from their side.

If assistance from Therefore Support is required to implement the Therefore™ side of the connector, an appointment must be booked ahead of time. For the Therefore™ Connector for SAP Netweaver, it is recommended to book an appointment with Therefore Support at least **10 business days** before the planned implementation date.

## 3.4 Support

Documentation for the Therefore™ Connector for SAP NetWeaver is available online.

- Administrator documentation: [http://therefore.net/sap\\_doc](http://therefore.net/sap_doc)

Technical support is available from Therefore Corporation to support the implementation of connectors. Dedicated support for such installations is provided as part of the [RIAS](#) service (Remote Installation Assistance and Support). This paid service is available in half-day or whole-day increments and consists of communication through electronic means, normally using collaborative platforms such as Webex or TeamViewer. Thus, internet access must be available at the implementation site to receive live support.

Implementation support, including RIAS, must be booked well in advance of the implementation, according to the [guidelines](#) for this connector. Support can be booked by contacting the Therefore Support Team at [support@therefore.net](mailto:support@therefore.net).

## 4. Therefore™ Connector for Microsoft SharePoint

### 4.1 Functional Specifications

The Therefore™ Connector for Microsoft® SharePoint® allows integration of Therefore™ with SharePoint by connecting document libraries in SharePoint with categories in Therefore™. Through the SharePoint interface, users have direct access to documents saved in the Therefore™ system via special Web Parts provided by the connector. The solution can be configured so that specific documents, and their associated index information, are sent to Therefore™ and automatically deleted from SharePoint; thereby effectively reducing the size of the SharePoint system and improving system performance. Furthermore, documents can be copied and moved in both directions.

Requirements for Therefore™ Connector for Microsoft SharePoint WebParts:

System Requirements	
Microsoft SharePoint version	<ul style="list-style-type: none"> <li>• SharePoint 2010                             <ul style="list-style-type: none"> <li>◦ A Therefore™ Client installed on each SharePoint server that needs to connect to Therefore™</li> <li>◦ Therefore™ Connector for Microsoft SharePoint v4.3.12</li> </ul> </li> <li>• SharePoint 2013                             <ul style="list-style-type: none"> <li>◦ A Therefore™ Client installed on each SharePoint server that needs to connect to Therefore™</li> <li>◦ Therefore™ Connector for Microsoft SharePoint v4.5.12</li> </ul> </li> <li>• SharePoint 2016                             <ul style="list-style-type: none"> <li>◦ A Therefore™ Client installed on each SharePoint server that needs to connect to Therefore™</li> <li>◦ Therefore™ Connector for Microsoft SharePoint v4.7.12</li> </ul> </li> </ul>
Therefore™ version	2018 or later (Business or Enterprise Editions) <sup>1</sup>

More detailed system requirements can be found in the [Support](#) section of this document.

Requirements for Therefore™ Crawler for Microsoft SharePoint:

System Requirements	
Microsoft SharePoint 2013, 2016 and Online	Therefore™ Connector for Microsoft SharePoint.
Therefore™ version	2018 or later (Business or Enterprise Editions) <sup>1</sup>



<sup>1</sup>Some Therefore™ editions are region-specific. Check your local Therefore™ documentation for more details.

## 4.2 Estimated Time Required

This section gives an estimate on the amount of time required to implement this connector. These estimates are based on experience with standard implementations and use case scenarios. It should be taken into account that more complex installations will require more time than the estimates given below.

Party	Estimated Time	Notes
System Integrator	1 to 2 days	The integrator handling the implementation should read the <a href="#">pertinent documentation</a> for the Therefore™ connector to give a more precise estimate of the time required from their side.
Therefore™ Support	1 to 2 days <a href="#">RIAS</a>	See detailed information in <a href="#">Installation Preparation</a>
Canon	--	It is suggested that a Canon representative be present during the installation to act as the intermediary between Therefore™ and the integrator. If possible, it's also recommended for a Canon technician to observe the implementation to get familiar with the process through knowledge transfer.

## 4.3 Installation Preparation

Before the Therefore™ connector can be implemented/installed, it may be necessary to book time for the system integrator to prepare the SharePoint system from their side, depending on the complexity of the system.

If assistance from Therefore Support is required to implement the Therefore™ side of the connector, an appointment must be booked ahead of time. For the Therefore™ Connector for Microsoft SharePoint, it is recommended to book an appointment with Therefore Support at least **5 business days** before the planned implementation date.

## 4.4 Support

Documentation for the Therefore™ Connector for Microsoft SharePoint is available online.

- Administrator documentation: [http://therefore.net/sp\\_doc](http://therefore.net/sp_doc)

Technical support is available from Therefore Corporation to support the implementation of connectors. Dedicated support for such installations is provided as part of the [RIAS](#) service (Remote Installation Assistance and Support). This paid service is available in half-day or whole-day increments and consists of communication through electronic means, normally using collaborative platforms such as Webex or TeamViewer. Thus, internet access must be available at the implementation site to receive live support.

Implementation support, including RIAS, must be booked well in advance of the implementation, according to the [guidelines](#) for this connector. Support can be booked by contacting the Therefore Support Team at [support@therefore.net](mailto:support@therefore.net).

## 5. Therefore™ Connector for Microsoft Exchange Server

### 5.1 Functional Specifications

The Therefore™ Connector for Microsoft Exchange Server is a server and policy based tool to offload and save e-mails in Microsoft Exchange Server to a secure storage location in Therefore™.

There are primarily two e-mail archiving scenarios that are covered by the Therefore™ system. The first is a manual procedure and is a standard Therefore™ feature which does not require the Therefore™ Connector for Microsoft Exchange Server. Scenario 1 is also possible in automatic mode, typically for mailboxes for orders etc., using the mailbox monitoring feature (requires the Therefore™ Content Connector). Scenario 2 is an automatic function and requires the installation of the connector for Microsoft Exchange Server.

#### Scenario 1

Users need to save and index specific e-mails to Therefore™. For example, in a lawyer's office an e-mail pertaining to a certain legal case can be saved to Therefore™ and indexed using the client matter number. This scenario does NOT require the Therefore™ Connector for Microsoft Exchange Server. This functionality is provided by Microsoft Office integration, a default feature in Therefore™.

It is also possible to monitor and automatically process emails using the Therefore™ Content Connector. More information can be found in the online Therefore™ [documentation](#).

#### Scenario 2

All incoming and outgoing e-mail traffic should be saved to Therefore™ and then stored on secure media. E-mails should not be deleted from the Microsoft Exchange Server. This is best solved by using the journaling functionality of the Microsoft Exchange Server. Using journaling, it is possible to forward a copy of every incoming or outgoing e-mail to a pre-defined mailbox. The Therefore™ Connector can then easily access this mailbox, save all e-mails from there and then clear the journaling mailbox. This process guarantees that all user e-mails are saved, but the user mailboxes are not affected at all. This method ensures optimal performance and minimum load for the Microsoft Exchange Server, as only one mailbox needs to be processed.

System Requirements	
Microsoft Exchange Server	2007 or later with the organizational forms library
Therefore™ version	2014 or later (Business or Enterprise Editions) <sup>1</sup>

More detailed system requirements can be found in the [Support](#) section of this document.



<sup>1</sup>Some Therefore™ editions are region-specific. Check your local Therefore™ documentation for more details.

### 5.2 Estimated Time Required

This section gives an estimate on the amount of time required to implement this connector. These estimates are based on experience with standard implementations and use case scenarios. It should be taken into account that more complex installations will require more time than the estimates given below.

Party	Estimated Time	Notes
System Integrator	1 to 2 days	The integrator handling the implementation should read the <a href="#">pertinent documentation</a> for the Therefore™ connector to give a more precise estimate of the time required from their side.
Therefore™ Support	1 to 2 days <a href="#">RIAS</a>	See detailed information in <a href="#">Installation Preparation</a>
Canon	--	It is suggested that a Canon representative be present during the installation to act as the intermediary between Therefore™ and the integrator. If possible, it's also recommended for a Canon technician to observe the implementation to get familiar with the process through knowledge transfer.

### 5.3 Installation Preparation

Before the Therefore™ connector can be implemented/installed, it may be necessary to book time for the system integrator to prepare the SharePoint system from their side, depending on the complexity of the system.

If assistance from Therefore Support is required to implement the Therefore™ side of the connector, an appointment must be booked ahead of time. For the Therefore™ Connector for Microsoft Exchange Server, it is recommended to book an appointment with Therefore Support at least **5 business days** before the planned implementation date.

### 5.4 Support

Documentation for the Therefore™ Connector for Microsoft Exchange Server is available online.

- Administrator documentation: [http://therefore.net/exc\\_doc](http://therefore.net/exc_doc)

Technical support is available from Therefore Corporation to support the implementation of connectors. Dedicated support for such installations is provided as part of the [RIAS](#) service (Remote Installation Assistance and Support). This paid service is available in half-day or whole-day increments and consists of communication through electronic means, normally using collaborative platforms such as Webex or TeamViewer. Thus, internet access must be available at the implementation site to receive live support.

Implementation support, including RIAS, must be booked well in advance of the implementation, according to the [guidelines](#) for this connector. Support can be booked by contacting the Therefore Support Team at [support@therefore.net](mailto:support@therefore.net).