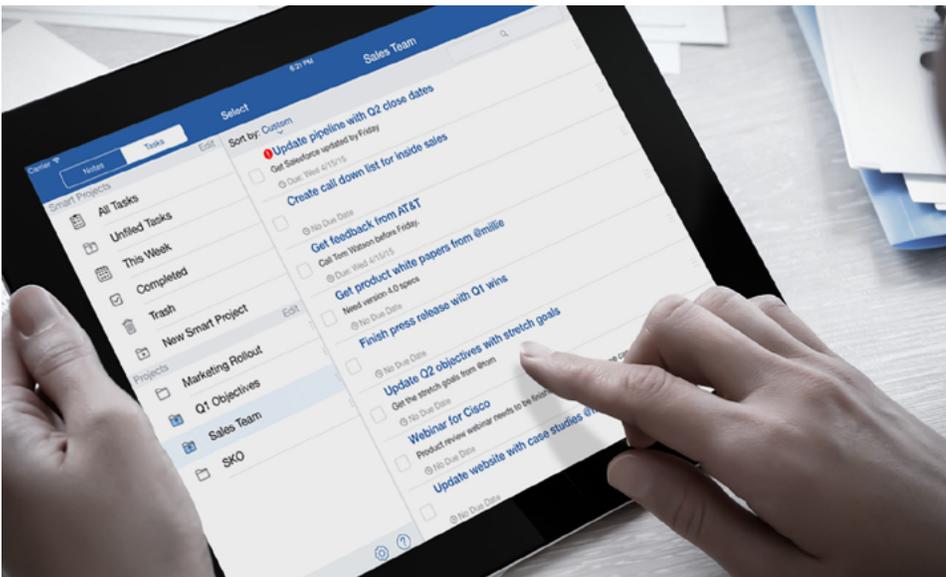


Paperless is The Future – And Shafer Systems is Forging a Path Towards It



Shafer Systems

Industry:

Business Software

Location:

Dallas, Texas

Partner Product:

Notate for BlackBerry®

Website:

www.shaferystems.com

A lawyer steps into the courthouse, equipped with nothing more than a tablet – their entire case accessible to them at a moment's notice. A doctor reaches out to a colleague on the other side of the world, securely sharing a patient's documents with them to determine the most effective treatment. An investor opens confidential documents from the comfort of their own home, collaborating seamlessly with other stakeholders in the process.

Following the shift towards distributed work created by the COVID-19 pandemic, the future lies in digital, paperless collaboration – and it's a future Shafer Systems is dedicated to helping its clients achieve.

"We've seen a dramatic peak in sales as users have transitioned to working from home," explains Founder and CEO Joel Shafer. "One financial customer, for instance, enabled all of their brokers to work remotely by allowing them to view, edit, and sign documents on iPads. They were able to keep productivity high while transitioning away from their office PCs."

Deskless, Paperless Collaboration

Founded in 2010 and situated in Dallas, Texas, Shafer Systems provides mobile application development services and products targeting the business productivity market. Their core product, **Notate**, is available globally, with a large customer base



in both the U.S. and the Netherlands. Notate is localized in English, French, Italian, German, Spanish, Russian, Dutch, Japanese, Chinese, and Portuguese.

An industry-leading productivity app, Notate allows users to securely capture information and synchronize with Microsoft® Exchange behind the firewall. It was designed specifically to enable teams to collaborate more effectively, especially when working remotely. It's architected to let business professionals record everything they need to do their job outside the office, including handwritten meeting notes, desktop quality PDF editing, and document scanning.

The core draw of Notate is that it allows employees access to all the same data they'd have at their workplace, no matter where they're working from. It enables teams to collaborate and share across multiple devices and operating systems. This allows distributed teams to not only avoid duplication of effort on collaborative projects, but also to work far more efficiently with one another across any distance.

"One of the things we try to do in Notate is provide the type of usability and flexibility you'd experience in an open-ended application like Evernote, with the type of security you'd see in a government organization," says Shafer. "A key way we do that is by offering not just individual productivity but *team* productivity."

"We've done really well in several specific industries, and the number one industry is banking," continues Shafer. "Really, any kind of industry that is regulated, where it's crucial that data is kept secure, is one in which we flourish. That includes banking and finance, legal, and healthcare."

One of Notate's clients, for instance, is a large healthcare organization. Prior to implementing the software, personnel had to travel onsite to speak directly with doctors, collecting charts, and patient data – this often meant hauling along a laptop and scanner to load physical documents into SharePoint. With Notate, however, they can simply use a smartphone or tablet.

Not only is this more secure, but it also means fewer hardware expenses, happier employees with less equipment, and fewer wasted hours.

Building a Secure Foundation with BlackBerry

Although Notate offers secure productivity and flexibility, Shafer recognized that customers in regulated industries needed more than that. They needed assurance that they could still use the application while retaining regulatory compliance. To provide that assurance, Shafer Systems built Notate using the BlackBerry® Dynamics™ platform, leveraging BlackBerry's portfolio in several ways:

- **Authentication:** Through simple single sign-on across Dynamics apps, Notate ensures that its users are who they say they are, and that they are authorized to access the software.
- **At-Rest and In-Motion Encryption:** Every piece of data, whether at rest or in use with Notate, that resides on the device is secure and encrypted. The BlackBerry Dynamics secure container protects the app, while BlackBerry's leading network protects data-in-transit. This also means that data is not put at risk when a device is lost or stolen.
- **Secure Connectivity:** Through the BlackBerry Dynamics SDK, Notate can connect readily to a business's Exchange server behind the firewall – data that isn't stored on the device is never stored on the cloud.

"I've worked with BlackBerry for several years now, and I've found that they're consistently miles ahead of everyone else. More importantly, they truly believe in our products, and openly promote them to their clients. Notate is simply better on BlackBerry."

– Joel Shafer
Founder and CEO, Shafer Systems

- **Best-in-Class App Interoperability:** Notate can work seamlessly with other business applications in BlackBerry's portfolio. This enables smooth, uninterrupted workflows by bringing different applications closely together, and integrating their functionality with Notate's.
- **Intelligent Security:** Through [BlackBerry® Persona](#), Shafer Systems can add machine learning and predictive AI to Notate, providing clients with adaptive security policies based on user location, device, and other security factors.

"We go through quite a bit of certification with our clients," says Shafer. "What I think really keeps our customers happy is knowing that every single application release that we put out is certified by Veracode and secured by BlackBerry. They know their data is protected because we made the effort to forge this partnership."

In the interest of enabling further productivity, Shafer and his team have also designed Notate to integrate with several of BlackBerry's core business apps, such as [BlackBerry® Work](#) and [BlackBerry® Access](#).

"Let's say, for example, you're in BlackBerry Access looking at a business report in your SharePoint," says Shafer. "You realize you need to make some annotations to that, so you send it directly from Access to Notate. Even though you're using three different apps, you don't have to interrupt your workflow at all – it's one of the things we like best about BlackBerry Dynamics. It provides a more frictionless and rich experience that is superior to other MDM or MAM partners."

The Power of Going Paperless

Digitization is the future. Shafer and his team have long known that. It's why they developed Notate in the first place, and why they've positioned it as a solution to help businesses be more organized, productive, and collaborative, even when working remotely.

However, they also understand that without security, remote collaboration is infeasible, at best – which is why, from the beginning, they chose to partner with BlackBerry.

"In enterprise, it's all about productivity and security," says Shafer. "That can be a difficult, delicate balance to strike. But through our partnership with BlackBerry, we've been able to do so with ease."

About BlackBerry

BlackBerry (NYSE: BB; TSX: BB) provides intelligent security software and services to enterprises and governments around the world. The company secures more than 500M endpoints including 150M cars on the road today. Based in Waterloo, Ontario, the company leverages AI and machine learning to deliver innovative solutions in the areas of cybersecurity, safety and data privacy solutions, and is a leader in the areas of endpoint security management, encryption, and embedded systems. BlackBerry's vision is clear – to secure a connected future you can trust.

For more information, visit [BlackBerry.com](#) and follow [@BlackBerry](#).

