

# Release Notes

Version: Therefore™ 2025

Date: Tuesday, May 13, 2025

## Enhancements & Changes

The following enhancements and changes are part of the Therefore™ 2025 release.

### Therefore™ On-Premises

- Introduced Therefore™ subscription edition to allow users to subscribe to Therefore™ On-Premises on a yearly basis. The options are monthly subscription, yearly auto-renewal, and prepaid without auto-renewal.

### Therefore™ Core

- Added two-factor authentication (2FA) functionality for internal Therefore™ users and Therefore™ Portal users. Two-factor authentication is supported by all Therefore™ clients.
- Implemented service accounts to allow connections from 3rd party services to Therefore™ without using 2FA
- Added the option for admins to grant access to Therefore™ to Microsoft Entra ID service principals
- Implemented document classification with Azure Document Intelligence
- Added license notifications allowing users to receive the most important information, such as maintenance or subscription expiry, via e-mail
- Added advanced search options users can utilize while searching for cases. The same options currently used in advanced searches for documents are available. This feature is only available on installed clients.
- Added the option to save comments as part of the workflow history when deleting a workflow instance
- Changed configuration of referenced web service schedule to refer to the standard time zone setting on the Therefore™ server instead of the client machine's timezone
- Enhanced the audit log to contain full-text queries
- Enhanced Therefore™ Smart Capture to be able to read information from additional sources, such as Swiss QR codes
- Therefore™ Setup will now ship 64-bit executables for all Therefore™ client applications. For certain configurations of the client, this may come with a breaking change. We recommend reading our Breaking Change page for more information. Additionally, a setup for specific components that may be required in 32-bit is available on our Extranet. Please see our Breaking Change page to understand if you need any of these components.
- Added new events and descriptions for Document and Case History, providing a more detailed record of events
- Added a Time Zone Setting allowing Administrators to set a specific Time Zone for the tenant. Removed Client Time Difference setting. The upgrade will attempt to convert the previous setting into the new one, however it is recommended that Administrators review this in the Advanced Settings page of the Therefore™ Solution Designer
- When converting signed PDFs, the visual representation of the digital signature will now be preserved
- Keyboard shortcuts for commands in the table context menu will now be shown next to each command
- Added ability to set appropriate permissions for a role via WebAPI
- Added functionality to share documents using Workflows

- Added a new setting allowing Administrators to disable the 'Forgotten Password' method of password recovery
- Added a new setting added to configure the handling of a situation where the Workflow Export Task attempts to export a file that already exists

#### Therefore™ Web Client

- Implemented a new design for the Therefore™ Web Client
- Implemented a new concept for URL actions that allows execution of and linking to query results
- Added document history to the Therefore™ Web Client, including the following options:
  - Filter document and case history events
  - Open a document version in a new tab
- Added improvement to Therefore™ documents and index data fields:
  - Expand table fields to allow advanced editing
  - Use the full-text search within a document
- Implemented additional workflow improvements:
  - Set the 'Auto-Advance' preference in the user account settings. This setting allows the user to be automatically redirected to the next task in the hit-list after processing a workflow task
  - Delegate workflow instances from the hit-list without claiming them
  - Save the state of workflow instruction checkboxes before the user processes a workflow task
  - Elevate user permissions regarding table fields to complete a specific workflow task
  - Claim and un-claim workflow instances from a hit-list
  - Re-route workflow instances including changing the process version
- Implemented additional functionality in the avatar menu:
  - Added an Out of office configuration to the user account settings
  - Check the login history to the user settings in the avatar menu
  - View storage usage information to the avatar menu
- Added additional error messages to improve the user experience:
  - Added a warning for certain actions in unsaved documents, e.g., to avoid printing an old version of a document
  - Implemented a specific error message if the user's timezone could not be detected
  - Implemented a specific error message if the Therefore™ Web Client could not be initialized

#### Therefore™ Solution Designer

- Implemented WYSIWYG HTML editor for e-mails configured in the Therefore™ Solution Designer, such as workflow notification e-mails
- Added a URL attribute to existing REST call objects, and added the option to configure the URL specified for Call REST Service and Referenced Web Service configurations using a script
- Added a button to REST call objects to enable and disable execution of specific requests. This functionality allows users to skip requests that are in development without using Next.Request.
- Improved usability of macros by using the field ID instead of the field caption as macro text. The field caption is still used as a fallback option to ensure backwards compatibility.
- Added a warning if a user is attempting to import a configuration that would delete index data fields in categories and/or case definitions
- Added support for multiple keyword fields when creating a case definition
- Enhanced security by limiting users' read access to settings that are only relevant to administrators
- Added the option to log the reason a document was retrieved
- Added a search function that allows Administrators to find a specific user in the tenant's user base
- Added Advanced settings:
  - Security: Disable 'Forgot Password'. Password recovery can be enabled and disabled.
  - Security: Session Token Lifetime. Custom JWT token lifetime can be set up to 1440 minutes. The default is 30 minutes.

## Therefore™ Navigator

- Added a warning if recipients of ad-hoc tasks are out of office

## Therefore™ Setup

- Therefore™ Anywhere is now an optional part of the setup. Additionally, SQL Compact will no longer be automatically installed for all users, and will only be included if they wish to have Therefore™ Anywhere installed.

## Therefore™ Integrations

- Added support for the comments feature to the Therefore™ for Teams integration. 'Additional information' has been replaced by a list of comments; and new comments can be added directly.

## Therefore™ eSignatures

- PleaseSign: Added smart anchor feature allowing users to place signatures in the document content
- DocuSign: Enabled possibility to use templates for multiple files
- Added support for the Context field for all eSignature providers

## Breaking Change

The following are breaking changes as a result of upgrading to Therefore™ 2025, as well as recommended guidance for dealing with such changes.

### Admin Only Settings

With Therefore™ Online v33, Admin Only settings are introduced. These settings are hidden from non-admin users. Potentially, the following issues may occur:

- In a rare scenario, some setting users previously had access to may now be invisible to them. For continued access, the users will need administrator privileges.
- The introduction of this feature may also affect some services: When not running as local system, the account for the services now needs admin permissions to Therefore™. Most notably, these are the Content Connector and Full-text Server. Other services might be affected too. To ensure the services keep running, make sure they have administrator permission.

### Change in Windows 11

Due to changes to Windows 11, the feature 'Print to Therefore™' may not work in some cases. The following workarounds have been employed successfully by users experiencing this issue:


- Editing the registry setting to change back to the old Windows 'Print to...' UI.
- Changing to the 64-bit version of the 3rd party application being used.
- Registering the post-print job to automatically save the PDF in Therefore™, if this is supported by the 3rd party application being used.

Users still experiencing issues may contact our technical support for further assistance.

### Therefore™ 64-bit Upgrade

The Therefore™ Online v32 release will bring a client side upgrade to 64-bit. With a standard configuration of Therefore™, no additional action should be necessary after the upgrade. However, in case of the scenarios listed below, please mind that without following those steps the client may not work after the upgrade.

- Customization projects based on the 32-bit installed API  
All customers using customization projects based on the 32-bit installed API should test their integration thoroughly before upgrading their Therefore installation. This includes .net customization projects, as despite .net functioning with both 32-bit and 64-bit modules, whether or not the integration continues to work without change will have to be tested.  
It is expected customers may encounter an error message as 'Cannot create instance of <customized class name>'. This may be resolved by re-registering the dll for 64-bit. This can be done by:
  - Opening the Command Line
  - Navigating to the directory 'C:\Windows\Microsoft.NET\Framework64\v4.x.x\'
  - Calling: 'regasm "C:\Path\To\Your\AddIn.dll" /codebase'
 In some cases it might be necessary to recompile the dll, it is recommended to recompile customizations such as these for 'AnyCPU'.

- HKLM registry settings are read from the 64-bit part of the registry  
As 64-bit applications read all 'HKeyLocalMachine' registry settings from the 64-bit part of the registry, after upgrading from 32-bit to 64-bit, such applications may no longer read such information from the registry. This includes Therefore™ settings such as the connection settings, viewing options, Capture client configuration, etc. Most of these Therefore™ settings can be configured either to be user specific in 'HKeyCurrentUser' (which is still available after the upgrade), or machine-specific in 'HKeyLocalMachine' (which may be lost as mentioned earlier). Please note that the Therefore™ setup copies all such settings from the 32-bit part of 'HKeyLocalMachine' to the 64-bit part. Thus, everything is expected to continue working after the upgrade. However, the setup will not overwrite any existing values. So, if a user had different settings in both parts of the registry, he will use the 64-bit settings after the upgrade and see a different behavior.
- Integrating Therefore™ into Tungsten Kofax  
As Kofax software is 32-bit, customers have to use the Therefore™ 32-bit setup to install either the Capture Client or the Kofax Capture release module in 32-bit.
- PDF viewing via Adobe Reader in Therefore™ Viewer  
 Currently, PDF viewing via Adobe Reader is only possible using the 32-bit version of Adobe Reader. Using the 64-bit version of Adobe Reader is not possible.
- Office Links  
When using the Therefore™ Office integration, we recommend using the 64-bit version of Microsoft Office. If a user wishes to continue working with the 32-bit version of Microsoft Office, the 32-bit Therefore™ API must be installed from the 32-bit legacy setup.
- SAP Client  
Customers using the 32-bit SAP Client will have to install the Therefore™ API and Therefore™ SAP dll from the 32-bit legacy setup. All users using the 64-bit SAP Client may continue to use it with the new standard Therefore™ 64-bit setup without any changes.
- References to Therefore™ Executables  
Any references the users have to any of the Therefore™ executables may be broken after the 64-bit upgrade. These references, such as shortcuts, will need to be recreated manually after the upgrade.

## System Requirements

Please refer to the [System Requirements](#) page on the Therefore™ 2025 Online Help.

## Upgrading

For instructions on upgrading Therefore™, please refer to the upgrade page on the Therefore™ 2025 Online Help: [https://www.therefore.net/help/2025/en-us/u\\_intro.html](https://www.therefore.net/help/2025/en-us/u_intro.html)