Release Notes

Version: Therefore™ Online v35

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Release Notes **1**
Enhancements and Changes **3**
Therefore™ Core 3
Therefore™ Workflow 4
Therefore™ Viewer 4
Therefore™ Content Connector 5
Therefore™ Smart Capture 5
Therefore™ Web Client 5
Therefore™ Portal 5
Therefore™ eForms 5
Therefore™ Connector for Microsoft Copilot 6
Therefore™ Online 6
System Requirements **7**
Upgrading **8**
Therefore™ Anywhere Migration 8
Breaking Changes **10**
Blacklisting System Tables 10
Deprecated Items **11**
Therefore™ Send 11
Therefore™ MFP Print 11

Enhancements and Changes

The following enhancements and changes are part of the Therefore™ Online v35 release.

Therefore™ Core

- Implemented functionality allowing users to configure System Variables for their Therefore™ system to be used in scripting, REST calls, and Workflow conditions
- Implemented framework for receiving webhooks to Therefore™ allowing real-time integration with 3rd party systems
- Credential Store:

  - Added a flag to mark credentials as exportable or non-exportable

  - Added the option for administrators to delete and replace credentials
- Added support for certificate based authentication for OAuth client credentials flows and added the corresponding option to the credentials store
- Added functionality to append new lines to existing CSV files to the Export to internal FTP option of the Export Document workflow task
- Switched Therefore™ Anywhere from SQL Compact to SQL Express leading to Therefore™ clients no longer supporting SQL Compact. Instructions on how to upgrade existing offline databases can be found in the Upgrade section. Users can also start synchronization from scratch instead of migrating.
- Added the option for administrators to clear user account lockouts by clearing the information type 'User-Group membership' from the Therefore™ Server using the Therefore™ Console
- Remapped Therefore™ dialogs to open to the new Help site when F1 is pressed while in a dialog
- Added functionality to persist information such as emails and display names from external user directories such as Microsoft EntraID

- Enabled using Microsoft EntraID as an external user directory without granting the EntraID permission Application.Read.All
- Added the ability for administrators to make filters for Reference Table lookup either mandatory or optional from the field properties of the primary field
- Added a checkbox in the Therefore™ Solution Designer allowing administrators to require manual confirmation for 2FA email links
- Blacklisted specific system tables. More information can be found in the Breaking Changes section

Therefore™ Workflow

- Included a setting allowing administrators to define if users can write and save Workflow and document level comments, or document level comments only
- Added the new function GetDocumentText to get the raw text of documents to use as the payload in REST calls
- Implemented functionality to read the header from a REST response. Headers are available in scripting using RESTCall.GetResponseHeader("*header name*").
- Added functionality to the Call REST Service workflow task for downloading and saving files to the document the workflow is executed for
- Added a new Therefore™ Console tool called 'Check Workflow Conditions', which goes over all conditions in the latest version of every workflow and reports which ones have become invalid due to security enhancements. This tool is meant to be used following the upgrade to ensure all workflow conditions are valid.

Therefore™ Viewer

- Added the option to use ISIS scanning after activation via REGKEY

Therefore™ Content Connector

- Added an option for administrators to receive an email notification if a source has been stopped or could not be started

Therefore™ Smart Capture

- Added an option to define the locale - regional information such as the default date format - for each Smart Capture queue in the Therefore™ Solution Designer

Therefore™ Web Client

- Added functionality to add and edit PDF annotations
- Added background colors for index data fields, including conditional formatting
- Added improvements to file viewing, such as rotating files
- Added the option to show index data fields in a new tab
- Added UI improvements such as saving the most frequently used index data field as default
- Introduced enhancements to the advanced search
    - Empty/ not empty operator
    - Using table columns as conditions

Therefore™ Portal

- Configured a new Therefore™ Portal in Preview Mode with view-only functionality. The existing Therefore™ Portal remains functional.

Therefore™ eForms

- Added the option to perform a search across keywords in keyword dictionaries
- Enabled renaming files automatically according to a template
- Implemented option to set the sorting of values in the Select component

- Added the option 'Custom' to the setting 'Compress size ratio' of the File component

Therefore™ Connector for Microsoft Copilot

- Added support for Therefore™ permissions to the Therefore™ Connector for Microsoft Copilot

Therefore™ Online

- Implemented SMTP enhancements

  - Users can define their own prefix for sender addresses, such as myprefix<tenant>@thereforeonline.com

  - Users who configured their own SMTP server now have the option to switch back to the default server

System Requirements

Please refer to the System Requirements page on the Therefore™ Online Help.

https://help.therefore.net/tfo/en-us/installation/ins_systemrequirements.htm

Upgrading

For instructions on upgrading Therefore™, please refer to the upgrade page on the Therefore™ Online Help:

https://help.therefore.net/tfo/en-us/installation/u_intro.htm

Therefore™ Anywhere Migration

Starting with Therefore™ 2026 for On-Premises users and the Therefore™ Online v35 server upgrade for Therefore™ Online users, support of SQL CE 4.0 (SQL Compact) as the offline database used by Therefore™ Anywhere is discontinued. Therefore™ Anywhere now requires SQL Express in order to function. Administrators can find instructions on how to migrate the SQL CE 4.0 database to SQL Express below.

Prerequisites

In order for Therefore™ Anywhere to function, the following components need to be installed on a client PC, meaning a PC where Therefore™ Navigator is running.

- Microsoft SQL Express

  https://www.microsoft.com/en-us/sql-server/sql-server-downloads

- ODBC Driver 18 for SQL Server

  https://learn.microsoft.com/en-us/sql/connect/odbc/download-odbc-driver-for-sql-server

- Users who want to migrate an existing database also have to download a zip archive named Therefore™ Anywhere Upgrade Kit from the Therefore™ Extranet. The script includes a utility and a script.

  https://extranet.therefore.net/downloads/therefore-setup/

As in previous versions of Therefore™, only Named Users for which the option 'Work Offline' has been checked can use Therefore™ Anywhere and take documents offline. This option can be found by right-clicking on the Therefore™ root object > selecting 'License' > 'Named Users' tab > checking the checkbox in the column labeled 'Work Offline'.

Creating a New Offline Database

This option is for users who want to use Therefore™ Anywhere with a new offline database instead of migrating an existing one.

Once the prerequisites are fulfilled, the creation of a new offline database can be done in the same way as in older versions of Therefore™, namely by right-clicking on a Therefore™ document or case definition in the Therefore™ Navigator hit-list and selecting the option 'Make Available Offline'.

Migrating an Existing Offline Database

This option is for users who want to use Therefore™ Anywhere with a an existing offline database.

To keep using the old offline database it needs to be migrated from SQL CE 4.0 to SQL Express.

- Unpack the Therefore™ Anywhere Upgrade Kit zip archive and save the 'ExportSqlCe40.exe' utility to the client PC.
- Copy the PowerShell script 'AnywhereUpdate.ps1' from the kit to the same folder as 'ExportSqlCe40.exe'.
- Run the script 'AnywhereUpdate.ps1' with administrator privileges.
- While running the script, enter the SQL Express instance name to which the offline database will be migrated. By default this is '.\SQLEXPRESS'.
- Running the script creates a logfile called 'export_log.txt' where the process can be reviewed.

After running the script, the options related to Therefore™ Anywhere - Synchronization tab, 'Work Offline/Connect to Server' - should be visible in the UI again.

Breaking Changes

Blacklisting System Tables

For security reasons, some system tables are blacklisted in the context of referenced tables and workflow conditions starting with Therefore™ 2026 or Therefore™ Online v35 respectively.

In addition, specific columns of some system tables are blacklisted.

Furthermore, the process of how workflow conditions are checked has become more restrictive and conditions are much more limited.

This means that some configurations that could be made before will not be possible in the future. Existing configurations will still work but they cannot be saved anymore. For that reason, changes to these existing configurations may not be possible.

It is recommended to clean up existing configurations that may be problematic. To assist administrators with encountering invalid workflow conditions, a new Therefore™ Console tool, 'Check Workflow Conditions' has been added. See our help page about the different console tools for further information regarding the steps to clean up existing configurations.

Console Tools

Deprecated Items

The following features are deprecated and will be discontinued with the end of September 2026 for Therefore™ Online users and the release of Therefore™ 2027 for Therefore™ On-Premises users respectively. The features will continue to function in older versions of Therefore™.

Therefore™ Send

The Send functionality in the Therefore™ Classic Web Client is set to be discontinued in the timeframe detailed above. Users are advised to use Share Document instead.

Therefore™ MFP Print

Therefore™ MFP Print is set to be discontinued in the timeframe detailed above. Therefore™ MFP scan is not impacted and continues to be supported.