

Release Notes

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Enhancements and Changes

The following enhancements and changes are part of the Therefore™ Online v34 release.

Therefore™ Connectors

- elInvoice Connector: Developed a web service hosted in Therefore™ Online for consistent processing of machine readable invoices such as ZUGFeRD, Facture X, and X-Rechnung *
- Developed an integration with Microsoft Copilot for bringing knowledge from Therefore™ to Copilot via Microsoft Graph **

* The elInvoice Connector is only available in the EMEA region

** The Copilot/Microsoft Graph connector is only available for Therefore™ Online, and will be available for Therefore™ On-Premises Subscription Edition and Business/Enterprise edition with the next version of Therefore™

Therefore™ Server

- Added a regkey setting (ForceDCOMPackagePrivacy) to enforce encryption for DCOM in server applications

Therefore™ Core

- Created a central credentials store node in the Therefore™ Solution Designer to conveniently manage stored credentials
- Minimized the need for manual adaptations in the configuration import process by introducing a new concept for referencing categories and workflow processes using a human readable ID, such as CtgryID, ProcessID, etc.
- Integrated support for logging into Therefore™ with passkeys, supported on the installed Therefore™ clients, Therefore™ Web Client and Therefore™ Portal, and Therefore™ Go

- Added functionality to the audit log for the Delete instance task to log the DocNo or CaseNo
- Implemented the following enhancements to Therefore™ workflow:
 - Enhanced the Wait task in Therefore™ workflows for small wait times (< 15 minutes). Instead of being processed the next time the Therefore™ server service is run these tasks are now processed immediately.
 - Enhanced the Export Document workflow task to include the option 'Export to internal FTP' so Therefore™ Online users can profit from stable export to their internal FTP folder
 - Gave power users the ability to delegate instances to other users. On the permission level, this means that users with both 'View all instances' and 'Delegate instances' permissions are now able to delegate workflow instances for other users.
- Improved behavior of the Therefore™ Content Connector to only disable the affected source if both processing and copying to Faulty failed
 - Added the option for administrators to be informed of the above Therefore™ Content Connector error by adding them to the list under the Advanced Setting 'License Notifications Email Recipients'
- Enhancements to OneDrive integration:
 - Added the option to connect to OneDrive using one's own EntraID application
 - Added the option to share files to be edited in OneDrive with a link restricted to the current user or organization

Therefore™ Web Client

Added the following functionality and new options to the Therefore™ Web Client:

- Download dialog enhancement to support configuring default file formats and allow file selection
- WCAG compliance updates:
 - Responsive Modals
 - Responsive Navigation Bar
- Move documents to another category, both manually and via workflow
- Delete and edit tasks from the task view page
- Improved performance for PDF viewing
- Direct URL actions: Added functionality to execute a query and show the workflow hit-list
- Enhanced expanded table field in index data dialog to make more actions available:
 - Improved display of tables
 - Bulk selection for tables
 - Change order of table rows with drag & drop
- UI updates:
 - Improved UI for document view by saving space at the top to see more file content and index data
 - Merged breadcrumbs and navigation bar

Therefore™ eForms

- Added translations for the date picker
- Added the option to reference forms in URIs by Form ID as well as FormNo

Therefore™ Solution Designer

- Disabled the spell checker in the HTML Editor to improve the user experience in UI languages other than English

Therefore™ Clients

- Added support for code flow using PKCE to replace implicit flows for connecting to Therefore™ clients using OIDC
- Changed the behavior of the installed client to only show categories the user can interact with

Therefore™ Smart Capture

- Allowed an additional field to be shown in data matching results so users can confirm the results more easily
- Enhanced the Upload To Smart Capture workflow task by adding separate icons for extractors and classifiers
- Reconfigured the settings 'Maximum number of pages processed per document' in the data extractor and 'Pages used for classification' in the classifier to also limit the number of pages uploaded to the Therefore™ Smart Capture service. This enhancement avoids processing issues in regards to long documents.

Therefore™ eSignatures

- Added a setting to deactivate template matching in DocuSign
- Added a new eSignature provider: Tungsten SignDoc

Breaking Changes

Credentials Store Upgrade

If certain configuration patterns exist for REST tasks in Therefore™ workflows they may stop working after the upgrade to v34.

Detailed information and instructions can be found in the Credentials Store Upgrade white paper on the Therefore™ Extranet, located in the Therefore™ Online category:

<https://extranet.therefore.net/downloads/white-papers/>

Endless Loops in Workflow Configurations

For Create Document tasks that start a workflow a check was implemented to match the functionality in the Copy Document workflow task.

This check confirms if the workflow started by creating the document would be the same workflow that is currently running.

If that is the case, the workflow is not started.

For administrators that have a configuration dependent on the aforementioned scenario it is recommended to move the Create Document task into a sub workflow that starts the main workflow again.

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