

# Release Notes

Version: 2016 (14.0.1)

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## Enhancements & Changes

### Therefore™ Forms

- Starting with Therefore™ 2016, administrators will be able to design highly customized forms in the Therefore™ Solution Designer. A Therefore™ Form is a visualization of an index data dialog designed using the expanded category designer, which now includes options for adding images, colors, fonts, and more. The forms concept is based around two levels of access: authenticated and unauthenticated. Authenticated users are those with a Therefore™ login and license. They can access, complete, and submit forms using either the Therefore™ Navigator or Therefore™ Web Access. On the other hand, unauthenticated users are external parties who do not have a Therefore™ login. They can enter and submit data by accessing a Therefore™ form hosted on a public website.

### E-signatures

- Starting in 2016, you will be able to send documents for signing to a DocuSign® account either manually from the Therefore™ Viewer or automatically using a workflow task. DocuSign® then handles the entire legal signing process. Once completed, documents can be manually or automatically retrieved back to Therefore™.

### Integration with Microsoft® PowerBI

- Starting with Therefore™ 2016, this Therefore™ integration will allow users to employ Power BI as a means to gain current analytics of their company's data. After configuring a Power BI user account, a Therefore™ administrator can easily create a Power BI dataset by choosing a category and the parameters which should be uploaded to the Power BI cloud. These parameters are then automatically uploaded at regular intervals. The report itself is easily created in Power BI using the robust, user-friendly design tools provided by the platform. Reports can be viewed in real-time by accessing the Power BI app on desktop or mobile, or by configuring the dashboard to be visible directly in the Therefore™ Navigator.

### PDF/A-3

- Starting with Therefore™ 2016, it will be possible to extract XML attachments from PDF/A-3 files using the Therefore™ Content Connector and Document Loader. Based on the XML data, the document can be auto-classified, indexed and saved to Therefore™, and downstream workflows can be used to further process the document automatically.

### Therefore™ Easy Updater

- From Therefore™ 2016 the Therefore™ Easy Updater is installed by default in Therefore™ Client setups. It installs a 3rd party service on the client machine which allows users to install updates pushed out by administrators without requiring administrator rights on the client machine.
- Therefore™ Easy Updater has also been included in Therefore™ 2015 Update 4 and will be included in Therefore™ 2014 Update 6 when it is released later in the year.

### Improvements to Therefore™ Navigator

- The NOT operand is now supported in searches. For example: Field: NOT p\* Extension: NOT pdf AND NOT docx Dates: NOT > 1.1.2015.
- Document searches are now supported via command line functions.

- It is now possible to send a Therefore™ document as a web-link. This is also supported in the Therefore™ Viewer & Therefore™ Web Access.
- Multiple languages are now supported for saved searches. For updating searches created in earlier Therefore™ versions, see the Upgrade manual.
- Multiple cases can now be closed or reopened from the hit-list.
- The window options in the View tab have been grouped into a new group called Therefore™ Viewer.
- Saved searches can now contain a full-text search alongside a standard category search.
- New cases and documents can be created directly in the Therefore™ Navigator.

### Improvements to Therefore™ Viewer

- The Therefore™ PDF Viewer is now available as a default viewer.

### Improvements to Therefore™ Category Design

- It is now possible to change look and feel of category dialogs, including changing the background and adding images.
- It is now possible to create documents that only contain index data. Category settings determine whether empty documents are allowed, optional or mandatory. In addition, a new cover sheet mode has been added that can display a graphical snapshot of the index data.
- Keyword fields can now be displayed as a table. In addition, when keyword, primary, or dependent fields are set to display as a list, it is now possible to set sort direction as well as whether the list should be expanded on typing.
- A number of new e-mail values, as well as <Guid>, have been added for text category fields.

### Improvements to Therefore™ Workflow

- Prior to Therefore™ 2016, waiting for certain documents before proceeding with a workflow was possible using transition conditions. This can now be done by using a new workflow task (Wait for Documents).
- Multiple macros can now be selected and inserted for use in e-mail configuration.
- The export document task can now export only the document without exporting the XML data.
- The overdue date for a task or process can now be defined using a date field.
- A reload button has been added to the Therefore™ Viewer and Case Manager that reloads the latest workflow instance, including transition information.

### Improvements to Therefore™ Capture Client

- Support for a number of special banking fonts has been added that allows these fonts to be specified for specific OCR zones in a capture profile.
- New OCR language support has been added for Arabic, Brazilian, Chinese (simplified), Chinese (traditional), Farsi, Hebrew, Japanese, Korean, Maltese, Ukrainian, and Welsh.
- 2D barcode recognition is available in the Therefore™ Capture Client when Kofax® VirtualReScan® is used as scanning engine.

### Improvements to Template Profiles

- It is now possible to send new documents via an e-mail address other than the default.
- It is now possible to attach files to a generated email.

### Improvements to Indexing Profiles

- It is now possible to define multiple data extractors for one indexing profile. This can be used, for example, for PDF/A-3 documents where the index data is stored in an embedded XML.
- A new profile type has been added for saving signed documents, returned from DocuSign®, back to Therefore™.
- The "Size" property has been added to the File object.
- It is now possible to create an empty document with only index data.
- A scriptlet for creating cases has been added to the Script Editor.

## Improvements to Therefore™ Content Connector

- A new signature monitoring module has been added to automatically retrieve complete documents that were sent to DocuSign® by a Therefore™ workflow.
- Any changes made to the configuration (e.g. sources, indexing profiles) will now be automatically updated every minute without the Therefore™ Content Connector service being restarted.
- The Therefore™ Content Connector is now supported in multi-tenant scenarios, including Therefore™ Online.

## Improvements to Therefore™ Universal Connector

- It is now possible to define a case search using the Therefore™ Universal Connector.

## Improvements to Therefore™ Console

- It is now possible to sort the active user view using additional criteria in the Therefore™ Console.

## Improvements to Therefore™ Web Access

- Thumbnails are now loaded in the background to speed up displaying of documents in the Therefore™ Web Viewer.
- It is now possible to cancel a file upload.
- The Therefore™ Web Case Manager now supports views published by administrators in the installed Case Manager.

## Improvements to Reporting

- It is now possible to create reports based on cases.

## Improvements to Error handling

- The version number of the TheBase.dll is included in Event Viewer entries.

## Therefore™ Replication Service

- Previously, a single instance of the Therefore™ Replication service supported only one Therefore™ tenant. Now multiple tenants are supported by each instance of the Therefore™ Replication service.

## Improvements to Therefore™ Security

- It is now possible to prohibit users without the Operator permission from configuring user delegation in the out-of-office configuration in Therefore™ Navigator and Web Navigator.
- Encrypt link (which can be turned on in the Advanced Settings in the Therefore™ Solution Designer) now also includes case, workflow instance and task numbers.

## UI Update

- The look and feel of many Therefore™ applications has been updated.

## UI Language support

Language	Therefore™ Installed Client	Therefore™ Mobile	Therefore™ MFP Scan	Therefore™ MFP Print	Full-text OCR
Arabic	yes	no	no	no	yes
Bulgarian	yes	yes	no	no	yes
Croatian	yes	yes	yes	yes	yes
Chinese (simplified)	yes	yes	yes	yes	yes
Chinese (traditional)	yes	yes	yes	yes	yes
Czech	yes	yes	yes	yes	yes
Danish	yes	yes	yes	yes	yes
Dutch	yes	yes	yes	yes	yes
English(US)	yes	yes	yes	yes	yes
French	yes	yes	yes	yes	yes
Finnish	yes	yes	yes	yes	yes
German	yes	yes	yes	yes	yes
Hungarian	yes	yes	yes	yes	yes
Italian	yes	yes	yes	yes	yes
Japanese	yes	yes	yes	yes	yes
Korean	yes	yes	yes	yes	yes
Norwegian (Bokmal)	yes	yes	yes	yes	yes
Polish	yes	yes	yes	yes	yes
Portuguese (Brazil)	yes	yes	yes	yes	yes
Portuguese (Portugal)	yes	yes	yes	yes	yes
Russian	yes	yes	yes	yes	yes
Serbian (Latin)	yes	yes	yes	yes	yes
Slovenian	yes	yes	yes	yes	yes
Spanish	yes	yes	yes	yes	yes
Swedish	yes	yes	yes	yes	yes
Turkish	yes	yes	yes	yes	yes

Note: the following Therefore™ installed applications are not translated: Therefore™ Export Utility, Therefore™ Tenants Manager, Therefore™ Console, Therefore™ Gadget and all the Therefore™ Connectors, except the Therefore™ Universal Connector.

Full-text OCR is also supported for: Farsi, Hebrew, Maltese, Ukrainian and Welsh.

## System Requirements

See the [System Requirements](#) page on the Therefore™ Online Help.

## Upgrading

For instructions on upgrading Therefore™, see the [upgrade](#) page on the Therefore™ Online Help.