OpenText™ TeleForm™

Release Notes

OpenText TeleForm Documentation

Release 20.3

OpenText™ TeleForm
Release Notes
Rev.: June 2020

This documentation has been created for software version 20.3.

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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1   Introduction

These Release Notes provide an overview of OpenText TeleForm 20.3 including new features, delivery information, and supported platforms.

OpenText recommends that you read these Release Notes in conjunction with the documentation included with the software package. If any conflicts exist, the Release Notes supersede the other documentation.

We also recommend that you check OpenText My Support (http://support.opentext.com) for any patches or documentation updates that may have been posted after the initial release of this product.

1.1   Release notes revision history

Revison date	Sections revised	Description of revision
June 2020	First release	All new content

2   About TeleForm

This section provides an overview of OpenText TeleForm 20.3.

OpenText TeleForm is an Intelligent Forms Automation solution that enables automated capture, classification, and extraction of information from paper and electronic documents and forms using powerful recognition technologies to eliminate time-consuming manual data entry.

Key features include:

- Advanced design & distribution: Create forms with embedded logic, integrate live data, and distribute by printing, faxing, emailing, and saving as PDFs.

- Flexible capture options: Capture documents on demand or in a batch directly from scanners and MFPs, fax, email, web browsers, and mobile devices.

- Powerful recognition technology: Extract information from documents with powerful OCR, handprint, barcode, checkbox, and other recognition technologies.

- Seamless validation and verification: Create business rules to validate extracted data with other systems, visually review exceptions, and correct information.

- Automated export & processing: Export documents and data into other systems, and feed into OpenText LiquidOffice to automate business processes.

2.1   New features

TeleForm 20.3 is focused on changes to help improve recognition quality, performance, and platform support as outlined below, but it also includes several new features.

2.1.1   Recognition enhancements

TeleForm uses the OpenText Capture Recognition Engine for machine print recognition and barcode recognition. This release includes a new version of CRE that provides the following enhancements in addition to many fixed issues:

- Improved recognition quality

- Support for new symbols

- Enhanced Asian language support

- Support for new platforms

Option to reduce exported image size

Auto Exports that have been set up to export color PDF/A or PDF/A+Text files will now use JPEG image compression. This results in the exported files being reduced in size by approximately 80% when compared to those exported in the previous release.

Remote Capture Station performance improvement

Remove Capture Station (RCS) enhancements have been made to improve performance when transferring batches over slow networks.

Web Capture Option authentication

To help improve security, new installations of the TeleForm Web Capture Option have anonymous access disabled by default. To access the Web Capture Configuration page, you must either enable Basic Authentication or Windows Authentication for the Web Capture application in IIS. You might first have to add the features to IIS using the Turn Windows Features on or off dialog. Upgraded environments will not be affected.

Increased scan timeout for Web Capture Scan Client

The Web Capture scan timeout value has been increased from 30 seconds to 60 seconds. This timeout is the time between when the scan button is pressed and when the scanner starts sending data. The additional time give the user more time to select settings in the scan dialog.

The timeout value can also now be modified if needed in the scan.js JavaScript file, look for "ScanTimeout". The value is set in miliseconds.

Updated OLE DB driver for SQL Server

TeleForm now installs and uses the Microsoft OLE DB Driver for SQL Server version 18.3 to access the internal database instead of the Microsoft SQL Server Native Client version 11.

2.1.2 Updated platform support

TeleForm has added support for the following platforms:

- Microsoft SQL Server 2019
- Microsoft SharePoint 2019

2.1.3 Documentation updates

The documentation has been updated to reflect the latest software enhancements

Some specific updates made to the documentation that are not related to the enhancements for the current release, include the following:

- The version info has been updated in the 3rd-Party commercial software document.

- The TeleForm User Guide has been updated to include the type of QR codes that can be recognized.

- The Correction Quick Reference Card has been added to the User guide.

2.2 Discontinued and deprecated features

The following features have been discontinued or deprecated.

2.2.1 Discontinued platform support

VMWare Server ESX, version 5.5

2.2.2 Deprecated features

The following features might still be accessible in TeleForm either as part of this release or following an upgrade from a previous release, to help customers during upgrade and migrate to alternative functionality; however, these features have been deprecated in this or a previous release.

Keep in mind the following considerations for deprecated features:

- Deprecated features might not work as expected in this release

- Deprecated features will not be updated in this or a future release

- Deprecated features might be removed altogether in a future release

Customers should consider migrating from deprecated features to alternative functionality within TeleForm for better support in this and future releases.

Deprecated feature	Description
BasicScript	BasicScript is no longer recommended for use with TeleForm and remains enabled only to support legacy environments. Use of the TeleForm COM Scripting API is recommended. A reminder is also issued each time the BasicScript editor is opened.
Capture Document Reader (formerly know as DOKuStar Professional)	TeleForm will continue support for existing Capture Document Reader functionality, however, support for new versions of Capture Document Reader is not planned.
Changing the Internal Image Format	The ability to change the Internal Image Format was not compatible with a number of newer TeleForm features and is no longer a supported function.
Using XLS files for export and lookups	Use of .XLS files for export and lookups is deprecated and might be removed in a future release. .XLS files are no longer supported in MS Office. Use .XLSX files instead.

Deprecated feature	Description
Using .MDB files for export and lookups	Use of .MDB files for export and lookups is deprecated and may be removed in a future release. .MDB files are no longer supported in MS Office. Use .ACCDB files instead.
TeleForm IDR (Intelligent Document Recognition)	Upgrading customers can continue to use TeleForm IDR with this release, and will be provided with support as needed, however no further updates will be made to IDR functionality in this or future releases.
MediClaim	Support for MediClaim was stopped many years ago and will be removed completely in a future release.
Revision Control with Microsoft SourceSafe	SourceSafe became end-of-life software many years ago and while it might still work, integration with this product cannot be updated or supported. Additional Revision Control Systems will be considered for use with TeleForm in future releases.
HP/iManage WorkSite MP Export	WorkSite MP became end-of-life software many years ago and while this integration may still work as expected, integration with this product cannot be updated or supported.
iManage WorkSite Connect Agent	The iManage WorkSite Connect Agent remains in TeleForm to enable customers to continue using it with previously supported versions of WorkSite, but no additional enhancements will be planned. The connect agent may be removed in a future release.
HP Meridio	Meridio became end-of-life software many years ago and while this integration may still work as expected, integration with this product cannot be updated or supported.
Visual Basic for Applications (VBA)	VBA was discontinued many years ago, and while this functionality may still work as expected, and support will be provided when possible, it cannot be updated.

3   Packaging and documentation

Downloads and documentation for TeleForm are available on OpenText My Support (https://support.opentext.com).

3.1   Packaging and delivery information

The software and documentation for TeleForm includes the TeleForm Installer Package, a downloadable file that includes the following:

Installer	Launched From
TeleForm Installer	Launched from main setup.bat installer or directly from .\TF\TeleForm\setup.exe
Web Capture Option Installer	Launched from main setup.bat installer or directly from .\WCO\setup.exe
Remote Capture Station Installer	Launched from main setup.bat installer or directly from .\RCS\setup.exe
Documentation Installer	Launched from main setup.bat installer or directly from .\DOC\setup.exe

On some systems, setup.bat will need to be launched with "Run as administrator." If you experience any problems with the main installer launching the individual setup programs, you can launch them directly as noted above.

3.2   Related documentation

For additional information about TeleForm, or for supplemental information about related products, refer to the OpenText TeleForm documentation, which is available on OpenText My Support (https://support.opentext.com).

3.3   Documentation errata

Release notes for prior releases

Information about prior releases can be found in the Release Notes for those prior versions. Recent release notes are included on the OpenText My Support site.

4 Supported environments and compatibility

This section provides details about supported platforms, systems, and versions.

4.1 Server, workstation, and desktop requirements

This table lists the minimum requirements for TeleForm servers, workstations, and desktops.

Product	Operating System	Hardware	Software
TeleForm Server	- Microsoft Windows Server 2012 R2 - Microsoft Windows Server 2016 - Microsoft Windows Server 2019	- Processor—Dual Core - RAM—4 GB - Network Card—100 Mbps TCP/IP network card - Hard Drive—100 GB of free space	
TeleForm Workstation	- Microsoft Windows 7 (SP1) - Microsoft Windows 8.1 - Microsoft Windows 10	- Processor—Dual Core - RAM—4 GB - Network Card—100 Mbps TCP/IP network card - Hard Drive—50 GB of free space	
TeleForm Desktop	- Microsoft Windows 7 (SP1) - Microsoft Windows 8.1 - Microsoft Windows 10	- Processor—Dual Core - RAM—4 GB - Hard Drive—50 GB of free space	

Product	Operating System	Hardware	Software
Citrix Environment TeleForm	• Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 **Tip:** As a best practice, use the following configuration: • A RAID 5 drive array • 3 active disks • 1 hot spare disk Set the system page file to 2.5 times the amount of physical memory. Locate the system page file on the data drive.	—	• **TeleForm server—** ○ TeleForm server should be configured and running on the LAN before you begin the TeleForm/Citrix XenApp installation. **Important:** Citrix XenApp and TeleForm are not certified to run on the same server. ○ See the TeleForm server requirements. For more information about TeleForm server requirements, see Server, Workstation, and Client Requirements the *OpenText TeleForm Administration Guide*. **Important:** The TeleForm server cannot be the same machine as the XenApp server. • **Citrix XenApp server—** ○ Citrix XenApp 7 **Note:** Refer to XenApp documentation for a list of supported server configurations. • **Citrix ICA Client**—ICA Client installed on a workstation that runs TeleForm via the XenApp server. **Tip:** You can use Citrix Web Interface Management to ensure that workstations have the most recent version of the XenApp client when logging in to the XenApp server using a web browser.

Product	Operating System	Hardware	Software
TeleForm Reader and AutoMerge Publisher	• Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 **Important:** While Reader and AutoMerge Publisher can run on the same operating systems as the TeleForm server, you should not install Reader or AutoMerge Publisher on the TeleForm server.	—	
Remote Capture Station	• Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10	• Processor—Dual Core • RAM—4 GB • Hard Drive—50 GB of free space	

Web Capture Server	• Microsoft Windows Server 2012 R2
	• Microsoft Windows Server 2016
	• Microsoft Windows Server 2019
		• RAM—4 GB
		• Hard Drive—50 GB of free space
			• The following software is required, depending on your setup:
			  ○ IIS—
			    ○ Internet Information Server 8.5
			    ○ Internet Information Server 10.0
			  ○ .NET—
			    ○ .NET: .NET Framework 4.0 or later (4.6.2 installed automatically if required)
			    ○ Web Services Enhancements for Microsoft .NET(WSE)
			
			See also "Supported environments and compatibility" on page 7.

Product	Operating System	Hardware	Software

Web Capture Client	• Microsoft Windows 7 (SP1)
	• Microsoft Windows 8.1
	• Microsoft Windows 10
		—	• The following software is required, depending on your setup:
			  ○ Web Browser—
			    ○ Microsoft Internet Explorer 11 (ActiveX support is required)

Mobile Web Capture Client	Any OS that has supported browsers		Any browser with HTML5 support

4.2   Additional supported software

This table provides support information for additional software that can be used with optional functionality in TeleForm:

Software	Supported Versions/Formats	Considerations
Active Directory server	• Microsoft Active Directory 2012 • Microsoft Active Directory 2016 • Microsoft Active Directory 2019	—
Fax Servers	• OpenText RightFax 9.x • OpenText RightFax 10.x • OpenText RightFax 16.x	• To make sure that TeleForm has access to the correct libraries, you must download and install the appropriate version of the RightFax client on the same machine as TeleForm. • Fax servers must be installed and configured *before* you install TeleForm. • When you install TeleForm, you must enter information about the fax server.
Email Fax Servers	Email Fax Servers that can process images attached to an email such as eFax.	Email Fax Support must be selected during TeleForm installation and configured using the Send Email Fax Connect Agent.
Scanners	TeleForm supports scanners that are compliant with one of the following formats: • ISIS (Pixel) • Kofax • TWAIN	• Scanners must be installed *before* you install TeleForm on your workstations. Install and test your scanners before installing TeleForm on workstations, otherwise, there may be driver conflicts. • Some scanner settings may need to be configured after TeleForm is installed. • If any Web Capture Module client creates batches strictly from images in directories, a scanner is not required. • Scanning should be performed at 300 dpi for optimal speed and accuracy, or 200 dpi when image size is a consideration (such as color scanning). • You will achieve the best recognition results with a clean, black and white image

Software	Supported Versions/Formats	Considerations
Microsoft Office	• Microsoft Office 2013 • Microsoft Office 2016 (standalone installation and Office 365 subscription) • Microsoft Office 2019 (standalone installation and Office 365 subscription)	—
Microsoft Sharepoint	• Microsoft Sharepoint 2013 • Microsoft Sharepoint 2016 • Microsoft Sharepoint 2019	—
VMWare	• VMWare Server ESXi, version 6.0 or later.	• Only TeleForm Reader and TeleForm AutoMerge Publisher are supported with VMWare. • The operating system for the server used with TeleForm must be supported by both TeleForm and VMWare. • You may experience a decrease in performance when running on VMWare. As a best practice you should deploy TeleForm/VMWare in a test configuration to determine whether any loss of performance is acceptable.

4.3 Supported database servers

TeleForm supports the following database servers:

Database	Supported Versions	Considerations
Microsoft SQL Server	• Microsoft SQL Express 2008 (if installed by TeleForm for single-user systems) • Microsoft SQL Server 2012 • Microsoft SQL Server 2014 • Microsoft SQL Server 2016 • Microsoft SQL Server 2017 • Microsoft SQL Server 2019	• TeleForm requires a Microsoft SQL database. The TeleForm installation wizard can create a new database or use an existing database. • Microsoft SQL Server Express is included with the TeleForm installation program. If you choose this option, the TeleForm setup automatically installs and configures a Microsoft SQL Server Desktop Edition application on your computer. • To run TeleForm on a Microsoft SQL internal database, your Microsoft SQL database must be installed and running before you run the TeleForm setup program. You must have the appropriate user name and password, because you will be prompted for this information during the TeleForm installation.

4.4   Supported export formats

This table shows the formats to which TeleForm can export data and files:

Format	Supported Versions	Export		# of Auto Exports Per Form
		Data	Files	
Comma Separated Values (CSV)	—	✔		Multiple Auto Exports per form
Delimited Values (DEL)	—	✔		Multiple Auto Exports per form
Capture to Directory VB.NET	—	✔	✔	Multiple Auto Exports per form
CFM–Confirmation	—	✔		Multiple Auto Exports per form
Connect Agent for LiquidOffice (SOAP)	• OpenText LiquidOffice 7.6.1 and later **Note:** OpenText LiquidOffice was previously known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation, and Cardiff LiquidOffice.	✔	✔	One Auto Export per form
Micro Focus Content Manager	• Micro Focus Content Manager 8.3 • Micro Focus Content Manager 9.2 **Note:** Micro Focus Content Manager was previously known as HPE Content Manager, HPE Records Manager, HP Records Manager, and HP TRIM.	✔	✔	Multiple Auto Exports per form
IBM SPSS Statistics File Format (.SAV)	—	✔		Multiple Auto Exports per form
iManage Work **Deprecated:** Support for iManage Work is Deprecated as of version 20.3 and later	• iManage Work 9.0 **Note:** iManage Work was previously known as HP WorkSite, Autonomy WorkSite, Interwoven WorkSite, and iManage WorkSite.	✔	✔	Multiple Auto Exports per form
Microsoft Access	—	✔		Multiple Auto Exports per form
Microsoft Excel	—	✔		Multiple Auto Exports per form
Microsoft SharePoint	—	✔	✔	Multiple Auto Exports per form
ODBC (Text and Data Source)	—	✔		Multiple Auto Exports per form

Format	Supported Versions	Export		# of Auto Exports Per Form
		Data	Files	
OpenText Content Server	• OpenText Content Server 16.x • OpenText Content Server 20.2	✔	✔	Multiple Auto Exports per form
XML	—	✔	✔	Multiple Auto Exports per form

4.5   OpenText product compatibility

The section provides details about which versions of other OpenText products are compatible with this release of TeleForm 20.3.

> **Note:** For the latest compatibility information for OpenText products, refer to the Compatibility Matrix (https://knowledge.opentext.com/go/matrix) on OpenText My Support.

Product name	Version	Notes
OpenText LiquidOffice	20.2 16.7 16.6 16.4.x 16.2 7.6.1 to 7.8	Formerly known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation (APA), and Cardiff LiquidOffice.
OpenText RightFax	9.x 10.x 16.x	—
OpenText Capture Document Reader	4.6 Build 20 3.6 Build 41	Formerly known as DOKuStar 4.6 Build 20 requires DOKuStar Extraction Plug-in v6.0 SR01
OpenText Content Server	16.x 20.2	—

4.6   Language support

TeleForm is currently localized in the following languages. Additional languages may be available in future releases.

Component	Languages					
	EN	ES	DE	FR	JA	PT-BR
TeleForm UI	B	UI	UI	UI	UI (1*)	UI
Web Capture Options	B	—	UI	—	UI	—

UI = user interface only

B = both user interface and online help

*1 = Installer for Japanese version is in English

5 Fixed issues

This section provides information about past issues that have been fixed in this release.

Issue number	Issue description
TF-5773	Degraded performance with PDF417 barcodes.
TF-6887	Unable to read some data from PDF417 barcodes.
TF-7049	Decoding issue with PDF417 barcodes.
TF-10361	Codabar barcodes might not work as expected when using the raw data option.
TF-10430	Decoding issue with PDF417 barcodes.
TF-10469	Unable to connect to LiquidOffice using LiquidOffice SOAP Export when using strict TLS 1.2.
TF-10507	Decoding issue with Code 93 barcodes.
TF-10508	Verifier crash when unclassifying forms in Classification QC.
TF-10558	Clarity of security configuration documentation for Remote Capture Station.
TF-10561	IDR field mapping problem.
TF-10602	Export Field mapping dialog behavior is odd.
TF-10857	Reader does not return certain special characters for Code 39 (Normal 44 Characters) barcode type

6   Contact information

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