

OpenText™ TeleForm Release Notes

16.2

Product Released: 2017-04-28

Release Notes Revised: 2017-04-17



Caution

Cautions help you avoid irreversible problems. Read this information carefully and follow all instructions.




Important

Important notes help you avoid major problems.



Note: Notes provide additional information about a task.

 **Tip:** Tips offer you quicker or easier ways of performing a task.

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1 Introduction

These Release Notes provide an overview of TeleForm 16.2, 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 the OpenText My Support site (<https://knowledge.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

Revision Date	Sections Revised	Description of Revisions
2017-04-28	First release.	All new content.

2 About TeleForm

This section provides an overview of TeleForm 16.2.

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.
- **Intelligent document recognition:** Automatically identify, classify, and extract relevant data from semi-structured and non-standard documents such as invoices.
- **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 & Enhancements

TeleForm 16.2 includes the following new features.

2.1.1 Export to OpenText Content Server 16

TeleForm has added a new Export that enables export directly to OpenText Content Server 16.

- Allows images and documents to be exported from TeleForm into specified locations in Content Server
- Supports the mapping of fields from TeleForm forms to document properties in Content Server
- Supports versioning if a copy of the document already exists in Content Server
- Supports email notification upon successful and/or unsuccessful export of a document

2.1.2 Support for OpenText RightFax 10.6

TeleForm integrates with OpenText RightFax to enable forms distribution and capture by Fax.

- Support has been added for OpenText RightFax 10.6

2.1.3 Advanced Document Extraction Update

TeleForm's Advanced Document Extraction (ADE) feature enables use of OpenText Capture Document Reader (CDR) to process semi-structured documents with rules-based processing. CDR includes technology that was previously known as DOKuStar Extraction.

This feature is intended to support legacy customers upgrading from older versions of TeleForm that included DOKuStar Extraction, and also support implementations of CDR by OpenText partners as an option for semi-structured document processing.

- Support has been added for OpenText Capture Document Reader 4.6

2.1.4 Vietnamese Handprint Recognition (Beta)

TeleForm now includes new capabilities for recognition and extraction of Vietnamese handprint. This is included as a beta feature in this release that can be configured for use in a non-production environment. Customers can learn more about participation in the beta program by contacting their account manager.

2.1.5 New Scripting API Features & Enhancements

TeleForm has added new scripting API features to provide more flexibility delivering custom solutions.

- New "Send" object and methods to provide user-implemented alternatives for Fax/Email methods used by AutoMerge Publisher
- New Batch_xxQCBegin Entry Points
 - ImageQCBegin

- ClassificationQCBegin
- ExtractionQCBegin
- AnytimeQCBegin
- These “Begin” entry points can be used in conjunction with the existing “End” entry points to review the status of the batch before any changes are made to it in QC, and to detect changes that have been made during to the batch by the user between the Begin and End events.
- Batch_PreCommit entry point allows a batch commit to be cancelled prior to any commit processing, setting the batch status to Extraction QC for review
- Allow ExtractionQC to be set from AnytimeQC
- Added “ManualSeq” member to Batch object to track manual changes made to the order of items in the batch
- Added Login/Logout Events
- Allow script to cancel a Form Merge from the Form_Merge entry point. This allows the script to skip over certain merge records if the values in that record do not meet required criteria.
- Updated documentation and sample scripts to demonstrate use of new entry points

2.1.6 New Platform Support

TeleForm has added support for the following new platforms:

- Microsoft Windows Server 2016
- Microsoft SQL Server 2016

2.1.7 Additional Enhancements

A number of other enhancements have been added to TeleForm including the following:

- VersiForm and ExistingForm images can now be identified even if manually rotated in QC (TF-8585)
- Legacy encryption/hashing functions have been replaced with Windows-based encryption/hashing functions (TF-8686)
- A new version of the AMP API demo application written in C# using VS 2013 is included (TF-7509)

2.2 Discontinued and deprecated features

The following features have been deprecated in this release:

- 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 will also be displayed each time the BasicScript editor is opened (TF-8544).

- With the release of the new export for OpenText Content Server 16, the export for LiveLink 9.7 will no longer be supported. Note that the new export for Content Server 16 uses the currently supported Content Server APIs that may not exist in older versions of LiveLink or Content Server. Customers on older versions of LiveLink are encouraged to upgrade to the current version of Content Server.

3 Packaging and documentation

Downloads and documentation for TeleForm are available on the OpenText Knowledge Center (<https://knowledge.opentext.com/>).

3.1 Packaging and delivery information

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

- TeleForm Installer (launched from main setup.exe installer)
- Web Capture Option Installer (launched from main setup.exe installer)
- Remote Capture Station Installer (launched from main setup.exe installer or from the setup.exe installer found under .\RCS)
- Documentation Installer (launched from main setup.exe installer)
- Additional Connect Agent Installers (found under .\TF\Connect Agents)

3.2 Related documentation

For additional information about TeleForm, or for supplemental information about related products, refer to the following documents, which are available on the OpenText My Support site (<https://knowledge.opentext.com/>).

3.3 Documentation errata

3.3.1 Release Number Changes

This release of TeleForm is numbered 16.2 to conform with the standard OpenText release numbering approach. The previous release was TeleForm 11.2.

For this release, the version information in the properties of TeleForm-related DLLs and EXEs refers to an internal version number of 11.3 to maintain maximum compatibility with any code written by partners or customers that refers to this internal version number. However, partners and customers are encouraged to remove any assumptions about the progression of future versions numbers in future TeleForm releases.

3.3.2 Release Notes for Prior Releases

Information about prior releases (including documentation for new features in those releases) can be found in the Release Notes for those prior versions. Recent release notes are included in the root folder of the TeleForm installer package, and on the OpenText My Support site.

- [TeleForm 11.0 Release Notes](#)
- [TeleForm 11.1 Release Notes](#)
- [TeleForm 11.2 Release Notes](#)

3.3.3 New Feature Documentation

At the time of the TeleForm 16.2 release, documentation for some new features and other changes has been included only in the release notes. An updated documentation package may be made available on the OpenText My Support site at a later date. Information in these Release Notes supersedes that found in the help file, PDF documentation or earlier Release Notes.

3.3.4 TeleForm Content Server Export Documentation

The TeleForm Content Server Export enables export to OpenText Content Server 16.

Setup the Auto Export

With a Form or Document open in designer, set up the export using Auto Export dialog. Select OpenText Content Server as the format and bring up the OpenText Content Server Setup dialog by clicking the *Save As...* button:

OpenText Content Server Setup

General **Email Settings**

Server

URL

Authentication

User

Password

This export works with Content Server Version 16.

Options

Location

Sub folder Press '\$' for field list.

Document name Press '\$' for field list.

Description Press '\$' for field list.

Categories

Advanced versioning (major/minor)

If exists

File URL return

File URL Template

Not connected

The OpenText Content Server export requires that an image file be configured for the export. Configure it in the Auto Exports – File Export tab. The *Export Files* box must be checked. The directory location specified is used only for temporary storage while the file is being uploaded to the repository.

During Setup:

The *URL* should be the web server where the Content Server CWS web service runs. Depending on how the service is setup, a port number may be required. The export should be able to access the services by appending *cws/<SVC_NAME>.svc* (for IIS) or *cws/services/<SVC_NAME>* (for Tomcat) to the URL. Clicking *Connect* will try to log in to the *Authentication* service using the service URL templates for IIS or Tomcat and will save the correct template to the settings. If your service URL does not match one of the known templates, you can enter the full template in the URL field,

substituting '<SVC_NAME>' for the actual service names (*Authentication, DocumentManagement, ContentService, WorkflowService*, etc).

For *Authentication*, specify *Specific User* or *Windows*. If *Windows* is specified, the current *Windows* credentials are used to access the Content Server. When using *Windows* authentication, the credentials used to run reader as a service must have access to the Content Server.

A *Location* can be selected using *Browse* or a field macro may be used (type \$ for list). When the location comes from a form field, the field should contain the numeric ID of the location. The location must exist for export to succeed. Valid locations include workspaces, folders, email folders, project workspaces, compound documents, and workflow maps. Exporting to a workflow map will initiate a workflow instance.

A *Subfolder* will be created if it does not exist. Multiple levels are fine. Field macros may be used. Certain location types, such as compound documents, do not support subfolders.

Document name allows specification of file name used in export. Field macros may be used. The default value is a TeleForm unique name.

Categories determine which attributes can be applied to the document in the field mapping list. Select the categories before mapping fields.

Checking *Advanced versioning* causes *major.minor* version numbers to be used, otherwise simple versioning is used.

The *If exists* drop-down list determines what will be done if a file by the same name exists in the export location. Choices are: *New minor version, New major version, New name – append _<n>*. If simple versioning is used, then *new minor version* and *new major version* do the same thing.

The *File Return URL* allows the full URL of the exported file to be returned to a form field to be used by subsequent export.

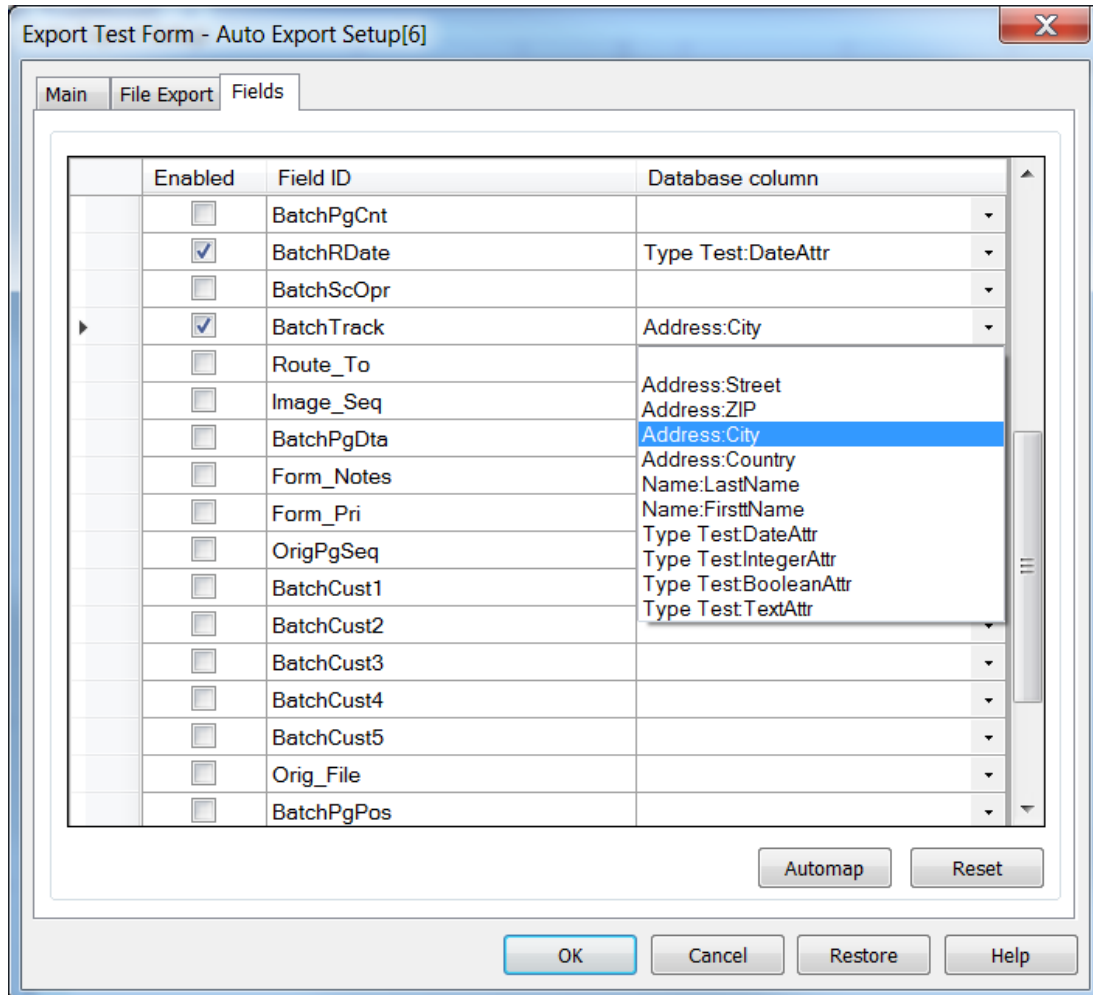
The *File URL template* field specifies a URL template that will be used to construct a file URL for email notifications and for the *File Return URL* field. If the *File URL template* field is empty when the *Connect* button is pressed, it will be filled with a typical template built from the server URL. This template may or may not be correct for any given server. "<ID>" in the template will be replaced by the ID of the exported file.

Metadata

Metadata field mapping is done on the Auto Exports - Fields tab. Support is included for most of the standard Content Server field types.

Note that errors writing metadata fields will be reported but will not cause the export to fail.

In the Fields tab a drop-down list will contain Attributes defined for the selected categories. Select the categories in the OpenText Content Server Setup dialog before mapping the fields.



Email Notifications

The export can be configured to send a user email notifications for successful exports, unsuccessful exports, or both. The user can be specified directly in the *Content Server Export* dialog, or a form field containing the email address can be specified (type \$ to get a list of fields). An administrator email can be configured to receive emails for certain errors.

Hostname and *port* must be specified for an SMTP server, as well as an email address to place in the *From:* address. *Domain*, *User*, and *Password* are optional.

The screenshot shows a dialog box titled "OpenText Content Server Setup" with a close button (X) in the top right corner. The dialog has two tabs: "General" and "Email Settings", with "Email Settings" currently selected. The "Email Settings" section is divided into two main areas: "SMTP Server" and "Email".

SMTP Server

Hostname	<input type="text" value="smtp.mycompany.com"/>	Domain	<input type="text"/>
Port	<input type="text" value="25"/>	User	<input type="text"/>
		Password	<input type="text"/>

Email

Send from email	<input type="text" value="someone@mycompany.com"/>	<input type="button" value="Test"/>
Notify user for	<input type="text" value="Both"/>	
User email	<input type="text" value="someone@mycompany.com"/>	<input type="button" value="Test"/>
Notify administrator for	<input type="text" value="Errors notifying user"/>	
Administrator email	<input type="text" value="someone@mycompany.com"/>	<input type="button" value="Test"/>

Not connected

OK Cancel

4 Supported environments and compatibility

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

4.1 Supported systems

4.1.1 TeleForm Server

- *Microsoft Windows Server 2016*
- *Microsoft Windows Server 2012 R2*

4.1.2 TeleForm Workstation and RCS

- *Microsoft Windows 10*
- *Microsoft Windows 8.1*
- *Microsoft Windows 7 (SP1) 32-bit or 64-bit*

4.1.3 TeleForm Web Capture Server

- *Microsoft Windows Server 2016*
- *Microsoft Windows Server 2012 R2*

4.1.4 Internet Information Server (IIS): 8.0, 10

- *.NET: .NET Framework 4.0 (4.6.2 installed automatically if required), Web Services Enhancements for Microsoft .NET(WSE)*

4.1.5 Web Capture Client

- *Microsoft Windows 10*
- *Microsoft Windows 8.1*
- *Microsoft Windows 7 (SP1) 32-bit or 64-bit*
- *Microsoft Internet Explorer 9, 10 or 11*

4.1.6 Microsoft SQL Server

- *Microsoft SQL Server 2014*
- *Microsoft SQL Server 2012*
- *Microsoft SQL Express 2008 (if installed by TeleForm for single-user systems)*

4.1.7 Microsoft Office

- *Microsoft Office 2013*

4.1.8 VMWare

- *VMWare Server ESX version 4 and higher*
- *Reader and AutoMerge Publisher only are supported for production use*

4.1.9 Citrix

- *XenApp 6*
- *XenApp 7*

4.2 Supported Fax Servers

4.2.1 OpenText RightFax

- *RightFax 10.x*
- *RightFax 9.x*

4.3 Supported Export Formats

4.3.1 OpenText LiquidOffice

- *LiquidOffice 16.2*
- *LiquidOffice 7.x*
- *OpenText LiquidOffice was previously known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation, and Cardiff LiquidOffice.*

4.3.2 OpenText Content Server

- *OpenText Content Server 16.x*

4.3.3 Hewlett Packard Enterprise Content Manager

- *HPE Content Manager 8.1*
- *HPE Content Manager 8.3*
- *HPE Content Manager was previously known as HPE Records Manager, HP Records Manager, and HP TRIM.*

4.3.4 iManage Work

- *iManage Work 8.5*
- *iManage Work 9.0*
- *iManage Work was previously known as HP WorkSite, Autonomy WorkSite, Interwoven WorkSite, and iManage WorkSite.*

4.3.5 Other

- *XML*
- *ODBC*
- *Capture to Directory*
- *CSV/DEL*
- *Microsoft Access*
- *Microsoft Excel*

- SPSS

4.4 OpenText product compatibility

The section provides details about which versions of other OpenText products are compatible with this release of TeleForm 16.2.

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

Product Name	Version	Notes
OpenText LiquidOffice	16.2 7.x	Formerly known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation (APA), and Cardiff LiquidOffice.
OpenText RightFax	9.x, 10.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	

4.5 Language support

TeleForm is currently localized in the following languages. Future releases may add additional languages.

Component	Languages							
	EN	DE	JA	FR	PT-BR			
TeleForm UI	B	UI	UI (*1)	UI	UI			

Component	Languages							
	EN	DE	JA	FR	PT-BR			
Web Capture Option	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-7166	Fixed various untranslated items in installer dialogs, particularly in the Portuguese installers.
TF-8625	Failure to import large image when creating new Existing Form in TeleForm Designer.
TF-8672	Improve context-checking for fields configured as “Both Print” in cases where one engine returns extra spaces between characters.
TF-8674	Template export from V11.2 to V11.0/V11.1 not compatible with V11.0/V11.1
TF-8675	Single Data Matrix barcode returns two duplicate values in some rare cases
TF-8684	Fix an issue in LiveLink export setup dialog where items in the Categories and Attributes tab would be hidden
TF-8690	Fix issue in Meridio export where an “Unknown error” would occur but export will still return “success”, preventing the failed export from being treated as an error.
TF-8741	“Store as date (if supported)” option causes issue when merging from Excel date field in some cases.

6 Contact information

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