opentext™

OpenText™ TeleForm

Release Notes

OpenText TeleForm Documentation

Release 16.3.1

OpenText™ TeleForm
Release Notes
Rev.: January 2018

This documentation has been created for software version 16.3.1.

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

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Support

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This web site provides contact information and details about the products, services, and support that OpenText offers.

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1 Introduction

These Release Notes provide an overview of TeleForm 16.3.1, 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://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
January 2018	First release	All new content

2 About TeleForm

This section provides an overview of TeleForm 16.3.1.

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

TeleForm 16.3.1 includes the following new feature(s).

2.1.1 Recognition engine updates

The TeleForm ICR engine has been updated to provide enhanced stability and recognition of Vietnamese hand print.

2.1.2 Support for HPE Content Manager 9.2

TeleForm now supports HPE Content Manager 9.2 to export data and files using auto export.

2.1.3 Reduced Installer Size

With the update and removal of outdated third-party components, the size of the TeleForm installer has been greatly reduced. The components that have been removed are no longer needed either because their functionality is built into the latest versions of Windows, or because the functionality was originally there to support connect agents that are no longer distributed with TeleForm.

The following components were removed from the installation package:

- Microsoft SQL Server Data Engine (MSDE)—This distributable is an old version of SQL Express. This distributable was removed because it is no longer used by TeleForm.

- Microsoft Data Access Components(MDAC)—This distributable includes old Windows ODBC libraries. This distributable was removed because it has since been replaced by WDAC, which is built into Windows.

- MSI45—This distributable is a previous verision of Windows Installer. This distributable was removed because it has since been built into Windows version 7 and later.

- .Net 3.5 framework—This distributable has been removed because all TeleForm code has moved to .NET Framework 4.0 and later. The HPE RM Export does still require .NET Framework 3.5, however, installing their client (which is required) should take care of this requirement.

- VJ++ redistributable—This distributable was formerly used by the WorkSite MP connect agent, which is no longer supported. The remaining WorkSite MP export DLLs have also been removed.

- Access 2010 driver update—The installation package previously distributed (but did not install) this update. This update was removed since it caused the installation to fail on some systems.

- Jet DB drivers (Access 2007)—This distributable was removed because these drivers no longer work on many systems. Some users might have to change their exports to use the 2010 Access drivers. Alternatively, if these drivers are needed, they can be downloaded from Microsoft.

2.1.4 Updated documentation

- The documentation has been updated to include additional requirements for installation with IIS and .NET in the installation instructions.

- The documentation has been updated to reflect the latest Desktop requirements.

2.1.5 Additional minor enhancements

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

- The list of available languages is now automatically sorted alphabetically across all Teleform applications.

- The SQL Server driver for TeleForm has been updated to improve access to 3rd party security features.

2.2   Discontinued and deprecated features

The following features have been deprecated:

- 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.

- 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.

- 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. Note that the October 10, 2017 Windows Update has already broken exports to .XLS files.

- 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.

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 following documents, which are 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 in the root folder of the TeleForm installer package, and 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	• Processor—Dual Core • RAM—4 GB • Network Card—100 Mbps TCP/IP network card • Hard Drive—500 GB with 50 GB free disk space	—
TeleForm Workstation	• Microsoft Windows 7 (SP1), 32-bit and 64-bit • Microsoft Windows 8.1 • Microsoft Windows 10	• Processor—Dual Core • RAM—4 GB • Network Card—100 Mbps TCP/IP network card • Hard Drive—100 GB free disk space	—
TeleForm Desktop	• Microsoft Windows 7 (SP1), 32-bit and 64-bit • Microsoft Windows 8.1 • Microsoft Windows 10	• Processor—Dual Core • RAM—4 GB • Hard Drive—100 GB free disk space	—

Product	Operating System	Hardware	Software
Citrix Environment Teleform	- Microsoft Windows Server 2012 R2 - Microsoft Windows Server 2016 **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 6 - 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), 32-bit and 64-bit • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows Server 2012 R2 (as a service or application only) • Microsoft Windows Server 2016 (as a service or application only)	—	Users of TeleForm Enterprise can run Reader and AutoMerge Publisher as services. Reader and AutoMerge Publisher (whether run as applications or services) can run on the same operating systems as the TeleForm Server, however, you should not install Reader or AutoMerge Publisher on the TeleForm server. For more information about TeleForm Server requirements, see Server, Workstation, and Client Requirements the *OpenText TeleForm Administration Guide*.
Remote Capture Station	• Microsoft Windows 7 (SP1), 32-bit and 64-bit • Microsoft Windows 8.1 • Microsoft Windows 10	• Monitor—Color Monitor • Processor—Dual Core • RAM—4 GB • Hard Drive—100 GB free disk space	—
Web Capture Server	• Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016	• RAM—4 GB • Hard Drive—500 GB with 50 GB free disk space	The following software is required, depending on your setup: • IIS— • Internet Information Server 8.0 • 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.
Web Capture Client	• Microsoft Windows 7 (SP1), 32-bit and 64-bit • Microsoft Windows 8.1 • Microsoft Windows 10	—	The following software is required, depending on your setup: • Web Browser— • Microsoft Internet Explorer 9 • Microsoft Internet Explorer 10 • Microsoft Internet Explorer 11

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
Fax Servers	• OpenText RightFax 9.x • OpenText RightFax 10.x	Currently applies to workstations only • Fax servers must be installed and configured *before* you install TeleForm. When you install TeleForm, you must enter information about the fax server.
Scanners	TeleForm supports scanners that are compliant with one of the following formats: • ISIS (Pixel) • Kofax • TWAIN	Currently applies to RCS, Workstations, and WebCapture Clients • 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
Microsoft Office	• Microsoft Office 2013 • Microsoft Office 2016	Currently applies to Workstations —
VMWare	• VMWare Server ESX, version 4 or later.	Currently applies to Server and Workstations • Only TeleForm Reader and TeleForm AutoMerge Publisher can run on 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 formats

TeleForm supports the following database servers:

Database	Supported Versions/Formats	Considerations
Microsoft SQL Server	• Microsoft SQL Express 2008 (if installed by TeleForm for single-user systems) • Microsoft SQL Server 2012 • Microsoft SQL Server 2014	• 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 16.2 • OpenText LiquidOffice 7.x **Note:** OpenText LiquidOffice was previously known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation, and Cardiff LiquidOffice.	✓	✓	One Auto Export per form
DDE	—	✓		Multiple Auto Exports per form

Format	Supported Versions	Export		# of Auto Exports Per Form
		Data	Files	
Hewlett Packard Enterprise Content Manager	• HPE Content Manager 8.1 • HPE Content Manager 8.3 • HPE Content Manager 9.2 **Note:** HPE Content Manager was previously known as 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	• iManage Work 8.5 • 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
OpenText Content Server	• OpenText Content Server 16.x	✔	✔	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 16.3.1.

> **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	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	—

4.6   Language support

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

Component	Languages				
	EN	DE	JA	FR	PT-BR
TeleForm UI	B	UI	UI (1*)	UI	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-8057	Fixed issue that caused Remote Capture Station (RCS) to require an unnecessary reboot after completing installation.

TF-8496	In certain cases, poor quality or "dirty" images can cause the recognition engine to take a very long time to process an image. TeleForm gives the engine a timeout value that indicates how long the engine should spend attempting to process the image. Then, if the engine does not respond within a short period after the timeout value ends, TeleForm assumes that the engine is hung, exits, and, and issues a fatal error. Forms with large image zones and very dirty images are prone to causing this fatal error.
	
	In order to minimize the occurrence of this error, the default timeout has been increased from 3 minutes to 30 minutes. This change allows almost all images to complete processing without error. Most images are processed in less than 3 minutes and will not be affected by this change.
	
	The timeout value can be changed in `teleglob.ini` file. However, it is recommend that you contact Customer Support regarding any need to change this value before doing so. In the `teleglob.ini` file, the timeout value is controlled by the following setting (where the value of time is entered as milliseconds)
	
	`[Nuance]`
	`Timeout=1800000`

TF-9218	Updated 3rd party components.
TF-9248	Fixed issue where, when running Vietnamese OCR (Machine Print), if more than one Windows user account is used to run TeleForm applications on a single machine (this includes any account used for running reader as a service), the feature doe not work correctly and you receive an internal error.
TF-9271	Fixed issue where a text object in a TeleForm Designer template was truncated if the template was printed using the TeleForm AutoMerge Publisher module. This same issue did not occur if the same template was printed directly using TeleForm Designer.
TF-9280	Fixed issue that caused images to not be classified when the **Choice field separator** option was set to any character other than a double space.
TF-9302	Fixed issue where after upgrading from 16.2 to 16.3, when you attempted to open TeleForm Reader or TeleForm Designer, the application issued a message that DLL expllink9.dll was unable to load.
TF-9329	Removed unused 3rd party components. These might have previously appeared as vulnerabilities on security scans.
TF-9333	Fixed issue where adding and removing a user from a group did not generate a log event in the audit log.
TF-9342	Fixed issue where Automerge Publisher crashes during email merge when MAPI is used as send method with Microsoft Office 2016.

6   Known issues

This section provides information about known issues in this release.

Issue number	Issue description
TF-9327	After the November 14, 2017—KB4048957 (Monthly Rollup) Windows 7 update, TeleForm Reader issues errors when shutting down. If you require the update, you can ignore the error messages that are issued when TeleForm Reader attempts to shut down. To ensure that you do not encounter errors when shutting down TeleForm Reader, you can either not take the upgrade or revert to an earlier version of Windows.
TF-9428	After the December 12, 2017—KB4054519 (Monthly Rollup) Windows Server 2012 R2 with Hotfix update, TeleForm Reader issues errors when shutting down. To ensure that you do not encounter errors when shutting down TeleForm Reader, you must either not take the upgrade or revert to an earlier version of Windows Server 2012 R2.

7   Contact information

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For more information, visit www.opentext.com