opentext™

OpenText™ TeleForm

Release Notes

OpenText TeleForm Documentation

Release 16.5

OpenText™ TeleForm
Release Notes
Rev.: October 2018

This documentation has been created for software version 16.5.

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 16.5, 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
October 2018	First release	All new content

2 About TeleForm

This section provides an overview of OpenText TeleForm 16.5.

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 16.5 includes the following new feature(s).

2.1.1 TeleForm recognition engine updates

TeleForm 16.5 includes new OpenText technology for machine print recognition and barcode recognition to help improve both recognition quality and performance. This new recognition engine is installed and enabled by default for both new installations and upgrades.

Customers that want to continue using the legacy recognition engine can do so by upgrading from TeleForm 16.3.1 and following the instructions in the *TeleForm recognition engine updates readme file* which is included in the installation directory at the following location:

`...\TeleForm\Readme_RecognitionEngine.htm`

> **Note:** OCR performance settings have no effect with the new recognition engine. Performance will be the same for all settings.

2.1.2 HTTPS communication with OpenText Content Server

With the OpenText Content Server connect agent you can now use HTTPS for secure communication with the server. Note that when setting up the Content Server Web Service on IIS, there are additional steps required to make it work with HTTPS. See https://knowledge.opentext.com/knowledge/cs.dll/kcs/kbarticle/view/KB9421540.

2.1.3 PDF rendering engine updates

The PDF rendering engine has been updated to improve functionality.

2.1.4 Increased maximum exports for Auto Exports

For export connect agents, the maximum number of auto-exports that you can configure for a form or document has ben increased from 16 to 64.

2.1.5 Updated documentation

- The documentation has been updated to reflect the latest software enhancements

- The *OpenText TeleForm Silent Install Guide* information has been integrated into the *OpenText TeleForm Administration Guide*.

- Improvements and structure changes have been applied to the following guides to make it easier to find and understand content:

  - *OpenText TeleForm Administration Guide*

  - *OpenText TeleForm Getting Started Guide*

  - *OpenText TeleForm User Guide*

  - *OpenText TeleForm Enterprise Best Practices Guide*

  - *OpenText TeleForm Intelligent Document Recognition Designer Online Help*

2.1.6 Updated platform support

TeleForm has added support for the following platforms:

- Content Server 16.2.5

- RightFax 16

2.2   Discontinued and deprecated features

The following features have been discontinued or deprecated.

2.2.1   Discontinued platform support

- Citrix XenApp 6

- Microsoft Internet Explorer 9

- Microsoft Internet Explorer 10

- VMWare Server ESX 4.4

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

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.
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	- 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 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 Requirementsthe *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 8.5
			  • 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.

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 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 • 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.
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
Microsoft Office	• Microsoft Office 2013 • Microsoft Office 2016	—
VMWare	• VMWare Server ESX, version 5.5 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	- 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 Data	Export Files	# of Auto Exports Per Form
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 16.4.x - OpenText LiquidOffice 16.2 - OpenText LiquidOffice 7.5 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

Format	Supported Versions	Export		# of Auto Exports Per Form
		Data	Files	
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	• 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 16.5.

> **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	16.4.x 16.2 7.5 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	16.2.4	—

4.6   Language support

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

Component	Languages				
	EN	DE	FR	JA	PT-BR
TeleForm UI	B	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-8731	In Capture zone, the **Prefill with last** option does not prefill the **Choice** list with the value that was selected in the previously processed form.
TF-9327	After you install the November 14, 2017—KB4048957 (Monthly Rollup) update, you encounter issues with Reader during shutdown.
TF-9343	When running TeleForm Verifier on Citrix, when you leave a message dialog box open which shows an application startup message (such as `TeleForm Verifier is already running on this workstation`) on any Citrix client, sometimes Verifier fails to start successfully.
TF-9428	After you install, Hotfix KB4054519 (December 12, 2017—KB4054519 (Monthly Rollup)) on Windows Server 2012 R2, Reader crashes.
TF-9464	When you use an identify script to force the identity of forms when they have not been recognized through normal methods, if the ID block reads but fails on a checksum, it doesn't trigger the identify entry point. Prior to this fix, checksum validation of the traditional form ID block did not occur until after all ID Drop-ins were run. Because of this, an ID Drop-in with an Execution Mode of **Only if not identified normally** would not get run if a traditional form ID was found but rejected do to an invalid checksum, resulting in an un-identified image. Now, the checksum will get validated as soon as the ID block is read, and if the checksum fails, the **Only if not identified normally** ID Drop-in will run.
TF-9496	If you are using the Japanese language, and you try to evaluate an image using the legacy OCR engine, sometimes Reader logs an evaluation error.
TF-9513	If you use the SOAP connect agent to export to LiquidOffice, the export completes with no error, but creates an unexpected file with a .att extension instead of the expected PDF file.
TF-9517	If you use the SOAP connect agent to export to LiquidOffice, and the export fails, the error message contains the username and password.
TF-9524	TeleForm issues a StartBatch / Bad Request alert message when a batch is submitted from some Web Capture Clients (IDX version)
TF-9567	In the Content Server export connect agent set up, if you click **Categories**, TeleForm issues an unexpected error.
TF-9570	The Verifier Productivity Charts report is missing row data for the Forms/Hr column.
TF-9677	When configuring contacts in the Phone book for a Fax job, the **Select Contacts** window does not include the contact description.
TF-9687	When scanning or creating an existing form from an image, sometimes the PDF image color is reversed.

Issue number	Issue description
TF-9744	Sometimes when working with a dual monitor configuration, if you change your monitor configuration, dialogs can appear off screen without an easy way to recover them.
TF-9864	Unable to restore settings from snapshot.

6 Known issues

This section provides information about known issues in this release.

Issue number	Issue description
TF-8889	When using the Advantage StreamlineSQL ODBC DSN in Auto-Export setup, the Image zone Database lookup (Field Validation), or Merge (Merge database), you are not prompted to choose the table; however, if you use the same DSN in MS access, you are prompted to choose a table.
TF-9886	When using the default recognition engine introduced in TeleForm 16.5, Vietnamese OCR (fields, zones, PDF+text) does not work as expected. This will be addressed in a future release; however, as a workaround, to use TeleForm 16.5 for Vietnamese OCR you can upgrade from TeleForm 16.3.1 and configure it to use the legacy recognition engine. Note that Vietnamese hand print recognition does work as designed with both the new and legacy recognition engines in use. For more information about using the legacy recognition engine, see "TeleForm recognition engine updates" on page 2

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