

OpenText™ TeleForm™ CE 22.1

Release Notes

These Release Notes provide an overview of this version of OpenText TeleForm, including new features, packaging information, and supported platforms.

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OpenText™ TeleForm™

Release Notes

Rev.: Dec 2021

This documentation has been created for OpenText™ TeleForm™ CE 22.1.

It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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1 Introduction

These Release Notes provide an overview of OpenText TeleForm 22.1 including new features, packaging 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

Revision date	Sections revised	Description of revision
Dec 2021	First release	All new content
Feb 2022	Known issues	Added issue TF-11935

2 About TeleForm

This section provides an overview of OpenText TeleForm 22.1.

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.
- **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 22.1 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 (CRE) 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 platforms

2.1.2 OpenText RightFax Integration improvements

The following changes have been made to the RightFax integration:

- The authentication method used with RightFax can now be configured to either Windows authentication or RightFax authentication. RightFax authentication is selected by default. If Windows authentication is selected, RightFax also needs to be configured to use Windows authentication.
- TeleForm Reader and AutoMerge Publisher no longer need to be opened in Administrator mode when using RightFax to send & receive faxes.

2.1.3 Technology Updates

Several embedded technologies have been upgraded to better support new platforms and enhance security. In addition, the following updates have been made:

- The Visual C++ 2008 runtime will no longer be installed with new installations. It should be installed independently if required for any of the following components: SPSS export.
- The Visual C++ 2010 runtime will no longer be installed with new installations. It should be installed independently if required for any of the following components: VBA, IDR
- The Microsoft Windows .NET framework is no longer included with the installer. A supported version should be installed independently prior to installing TeleForm.
- The Microsoft Access Database Engine 2010 redistributable has been replaced with the 2016 version. The related sample files have also been updated to use this new engine. TeleForm installs this new database engine only if there is no old version of the access database engine already installed.

2.1.4 Other updates

- The VBA script editor is now disabled by default for new installations. The VBA script editor will still be enabled for upgraded installations, and it can be enabled or disabled at any time in Configuration Options. VBA is a deprecated feature and use of VBA script is not recommended.
- All TeleForm applications have been signed with a digital signature.
- Image zone post-processing templates now support up to 255 characters

2.2 Updated platform support

TeleForm has added support for the following platforms:

- Microsoft Windows 11
- Microsoft Windows Server 2022
- Microsoft Active Directory 2022
- TeleForm Desktop is also now supported on Microsoft Windows Server 2012 R2, Microsoft Windows Server 2016, Microsoft Windows Server 2019, and Microsoft Windows Server 2022
- OpenText RightFax 20.x and 21.x
- OpenText LiquidOffice 21.2
- OpenText Content Server 20.2 to 21.3
- Web Capture Option is now supported with the Microsoft Edge browser when using Internet Explorer Mode
- Secure LDAP (LDAPS / LDAP over SSL)

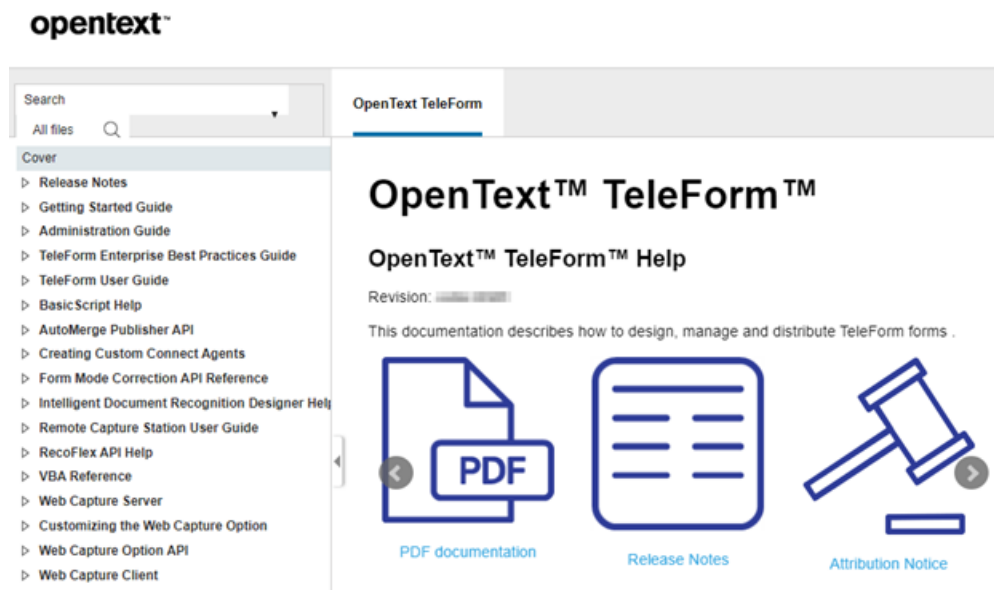
2.3 Documentation updates

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 updates.

2.3.1 New Help

TeleForm Help has been integrated into a new HTML based application to provide fast access to help for all modules from a single location. PDF documentation is included for additional reference.



2.3.2 Citrix Tech Note merged with Administration guide

The Citrix Tech Note has been removed as a separate document from the documentation. As of release 22.1 and later, the Citrix Tech Note information will be included as a part of the Administration guide.

2.4 Discontinued and deprecated features

The following features have been discontinued or deprecated.

2.4.1 Discontinued platform support

VMWare Server ESX, version 5.5

OpenText RightFax 9

OpenText RightFax 10

2.4.2 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.
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 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	<ul style="list-style-type: none"> • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 	<ul style="list-style-type: none"> • Processor—Dual Core • RAM—4 GB • Network Card—100 Mbps TCP/IP network card • Hard Drive—100 GB of free space 	
TeleForm Workstation	<ul style="list-style-type: none"> • Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows 11 	<ul style="list-style-type: none"> • Processor—Dual Core • RAM—4 GB • Network Card—100 Mbps TCP/IP network card • Hard Drive—50 GB of free space 	
TeleForm Desktop	<ul style="list-style-type: none"> • Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows 11 • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 	<ul style="list-style-type: none"> • Processor—Dual Core • RAM—4 GB • Hard Drive—50 GB of free space 	

Product	Operating System	Hardware	Software
<p>Citrix Environment TeleForm</p>	<ul style="list-style-type: none"> • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Tip: As a best practice, use the following configuration:</p> <ul style="list-style-type: none"> • A RAID 5 drive array • 3 active disks • 1 hot spare disk <p>Set the system page file to 2.5 times the amount of physical memory. Locate the system page file on the data drive.</p> </div>	<p>—</p>	<ul style="list-style-type: none"> • TeleForm server— <ul style="list-style-type: none"> ◦ TeleForm server should be configured and running on the LAN before you begin the TeleForm/Citrix XenApp installation. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Important: Citrix XenApp and TeleForm are not certified to run on the same server.</p> </div> <ul style="list-style-type: none"> ◦ See the TeleForm server requirements. <p>For more information about TeleForm server requirements, see Server, Workstation, and Client Requirements in the <i>TeleForm Administration Guide</i>.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Important: The TeleForm server cannot be the same machine as the XenApp server.</p> </div> <ul style="list-style-type: none"> • Citrix Virtual Apps (formerly XenApp Server)— <ul style="list-style-type: none"> ◦ Citrix Virtual Apps 7 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Refer to Citrix Virtual Apps documentation for a list of supported server configurations.</p> </div> <ul style="list-style-type: none"> • Citrix ICA Client—ICA Client installed on a workstation that runs TeleForm via the Citrix Virtual Apps server. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Tip: You can use Citrix Web Interface Management to ensure that workstations have the most recent version of the Citrix Virtual Apps client when logging in to the Citrix Virtual Apps server using a web browser.</p> </div>

4 Supported environments and compatibility

Product	Operating System	Hardware	Software
TeleForm Reader and AutoMerge Publisher	<ul style="list-style-type: none"> • Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows 11 • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>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.</p> </div>	—	
Remote Capture Station	<ul style="list-style-type: none"> • Microsoft Windows 7 (SP1) • Microsoft Windows 8.1 • Microsoft Windows 10 • Microsoft Windows 11 	<ul style="list-style-type: none"> • Processor—Dual Core • RAM—4 GB • Hard Drive—50 GB of free space 	

Product	Operating System	Hardware	Software
Web Capture Server	<ul style="list-style-type: none"> Microsoft Windows Server 2012 R2 Microsoft Windows Server 2016 Microsoft Windows Server 2019 Microsoft Windows Server 2022 	<ul style="list-style-type: none"> RAM—4 GB Hard Drive—50 GB of free space 	<ul style="list-style-type: none"> The following software is required, depending on your setup: <ul style="list-style-type: none"> IIS— <ul style="list-style-type: none"> Internet Information Server 8.5 Internet Information Server 10.0 .NET— <ul style="list-style-type: none"> .NET: .NET Framework 4.0 or later <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Important: .NET must be installed before you run the TeleForm installer.</p> </div> <ul style="list-style-type: none"> Web Services Enhancements for Microsoft .NET(WSE) <p>See also "Supported environments and compatibility" on page 12.</p>
Web Capture Client	<ul style="list-style-type: none"> Microsoft Windows 7 (SP1) Microsoft Windows 8.1 Microsoft Windows 10 Microsoft Windows 11 	—	<ul style="list-style-type: none"> The following software is required, depending on your setup: <ul style="list-style-type: none"> Web Browser— <ul style="list-style-type: none"> Microsoft Internet Explorer 11 (ActiveX support is required) Microsoft Edge (with IE mode)
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	<ul style="list-style-type: none"> Microsoft Active Directory 2012 Microsoft Active Directory 2016 Microsoft Active Directory 2019 Microsoft Active Directory 2022 	—
Fax Servers	<ul style="list-style-type: none"> OpenText RightFax 16.x OpenText RightFax 20.x OpenText RightFax 21.x 	<ul style="list-style-type: none"> 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 <i>before</i> you install TeleForm. When you install TeleForm, you must enter information about the fax server. Users on the RightFax server can be configured with any of the following authentication methods: <ul style="list-style-type: none"> RightFax authentication - Use a RightFax user name and password. Windows NT Authentication - Allow users to log in with Windows credentials of the logged in account. <p>For information about configuring a RightFax password and user name or for information about configuring Windows NT authentication for RightFax users, see the OpenText RightFax Administration guide.</p>
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	<p>TeleForm supports scanners that are compliant with one of the following formats:</p> <ul style="list-style-type: none"> ISIS (Pixel) Kofax TWAIN 	<ul style="list-style-type: none"> Scanners must be installed <i>before</i> 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	<ul style="list-style-type: none"> Microsoft Office 2013 Microsoft Office 2016 (standalone installation and Office 365 subscription) Microsoft Office 2019 (standalone installation and Office 365 subscription) 	—

Software	Supported Versions/Formats	Considerations
Microsoft Sharepoint	<ul style="list-style-type: none"> • Microsoft Sharepoint 2013 • Microsoft Sharepoint 2016 • Microsoft Sharepoint 2019 	—
VMWare	<ul style="list-style-type: none"> • VMWare Server ESXi, version 6.5 or later. 	<ul style="list-style-type: none"> • 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 might 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	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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:

4 Supported environments and compatibility

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)	<ul style="list-style-type: none"> LiquidOffice 16.2 and later <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: OpenText LiquidOffice was previously known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation, and Cardiff LiquidOffice.</p> </div>	✓	✓	One Auto Export per form
Micro Focus Content Manager	<ul style="list-style-type: none"> Micro Focus Content Manager 8.3 Micro Focus Content Manager 9.2 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Micro Focus Content Manager was previously known as HPE Content Manager, HPE Records Manager, HP Records Manager, and HP TRIM.</p> </div>	✓	✓	Multiple Auto Exports per form

4 Supported environments and compatibility

Format	Supported Versions	Export		# of Auto Exports Per Form
		Data	Files	
IBM SPSS Statistics File Format(.SAV) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Important: SPSS export requires Microsoft Visual C++ 2008 runtime (32-bit). If you use the SPSS export you must download and install the latest Microsoft Visual C++ 2008 runtime (32-bit) from Microsoft on each TeleForm workstation. If you attempt to run an SPSS import without Microsoft Visual C++ 2008 runtime (32-bit) installed, TeleForm applies the following warning message to the application log file:</p> <p>Unable to load the expspss.dll</p> <p>For more information about downloading and installing Microsoft Visual C++ 2008 runtime (32-bit), see the <i>Microsoft Download Center</i>.</p> </div>	—	✓		Multiple Auto Exports per form
iManage Work <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Deprecated: Support for iManage Work is Deprecated as of version 20.3 and later</p> </div>	<ul style="list-style-type: none"> iManage Work 9.0 <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: iManage Work was previously known as HP WorkSite, Autonomy WorkSite, Interwoven WorkSite, and iManage WorkSite.</p> </div>	✓	✓	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	<ul style="list-style-type: none"> OpenText Content Server 16.2.x OpenText Content Server 20.2 OpenText Content Server 21.3 	✓	✓	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 22.1.

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	21.2	Formerly known as HP LiquidOffice, HP Process Automation, Autonomy Process Automation (APA), and Cardiff LiquidOffice.
	20.2	
	16.7	
	16.6	
	16.4.x	
	16.2	
OpenText RightFax	16.x	—
	20.x	
	21.x	
OpenText Capture Document Reader	4.6 Build 20	Formerly known as DOKuStar 4.6 Build 20 requires DOKuStar Extraction Plug-in v6.0 SR01
	3.6 Build 41	
OpenText Content Server	16.2.x	
	20.2	
	21.3	

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-11553	Verifier crash This issue is fixed and now users can move between the pages during the correction.
TF-11023	PDF417 barcode recognition does not return comma character. This issue is fixed, and now the comma character gets returned correctly.
TF-11019	"The operation has timed out" when exporting large batch to Sharepoint The SharePoint export timeout value is configurable now. In case of a slow network, users can update the timeout value to export the large batches.
TF-11473	European language combination with other language is causing error during recognition This issue is fixed and the European language combination works now.

6 Known issues

This section provides information about known issues in this release.

Issue number	Issue description
TF-11935	In TeleForm, when attempting to run a client module, it can get stuck in the "Loading scripting" phase of the application startup. Running the application in administrator mode once will correct the issue. For more information, see knowledgebase article ID KB18385215.

7 Contact information

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