

OpenText Intelligent Forms Automation with TeleForm

Automate information capture by digitizing paper and high-volume structure forms to ensure information is accurately gathered and automatically routed to its destination for processing



Convert paper documents into easily sharable electronic information



Capture, classify and extract information from paper and electronic documents using powerful recognition technologies



Create accurate process-ready content in real time, increasing high-volume content throughput processing



Eliminate human data entry errors, reducing costly and disruptive exceptions

Associated
OpenText products

- **OpenText™ LiquidOffice™**
- **OpenText™ Application Content Management**
- **OpenText™ Content Server**
- **OpenText™ Capture Center**

Every day, customers and employees enter information on forms. No matter how they are created, distributed and captured, whether on paper, in electronic documents, by email, fax or using electronic forms, it is critical to process the information correctly and in a timely manner. Capturing and processing information accurately and efficiently can impact an organization's bottom line and provide a competitive advantage.

OpenText™ Intelligent Forms Automation with TeleForm™ is a comprehensive, enterprise-level solution that can address an organization's high-volume paper capture needs. Using Intelligent Forms Automation with TeleForm, organizations can:

- Automatically capture and index any form or document type.
- Easily and rapidly fold information from paper into electronic-based workflows from both distributed and centralized locations.
- Embed intelligence within a form to navigate the business process.
- Enforce internal and external regulatory compliance requirements.
- Increase productivity across a disparate, global enterprise.

TeleForm is available in three deployment options

1. TeleForm Desktop

TeleForm Desktop is designed for small business or limited use environments. It installs all components on a single machine, which performs the functions of the TeleForm server, as well as the scanning, reader and verifier station.

A TeleForm Desktop implementation is limited to a single machine and a single instance of each module, one Designer, one Reader, one Scan Station and one Verifier. There is no multi-user capability with a TeleForm Desktop implementation. Desktop may be a suitable version for organizations that do not need multiple users to work on the system and that process roughly 4,000 images or fewer per day.

2. TeleForm Workgroup

TeleForm Workgroup is designed for small-to-medium size deployments that need to process higher volumes, support multiple users or use features that are not available with TeleForm Desktop.

TeleForm Workgroup provides more processing power than TeleForm Desktop because it allows for a distributed architecture. The multi-user configuration allows for up to 20 modules comprising Designers, Scan Stations, Readers and Verifiers, which increases the efficiency and capability of the system.

Employee solutions

- Information request (status of vacation request, travel approval)
- Service request (vacation request, travel request, software request)
- Enrollment (employee benefits, newsletter)
- Onboarding (new employee onboarding, IT systems access)
- Acknowledgement (SOP and policy training completion)
- Response (follow-up to project request)
- Reporting (timesheet, expenses, status report)

Customer solutions

- Information request (for a product or service, order tracking)
- Service request (insurance claim, loan application, customer support)
- Enrollment (conference registration, newsletter, contest)
- Onboarding (new customers, accounts, services)
- Acknowledgement (the GDPR, appointment)
- Response (follow-up to a customer-initiated request)
- Reporting (fitness tracking, contest)

TeleForm Workgroup includes all the features available in TeleForm Desktop, as well as the ability to:

- Assign user rights and permissions.
- Run TeleForm License Manager as a service.
- Support Microsoft® Windows Universal Naming Convention (UNC).
- Use the Distributed Web Capture option (available at an additional cost).

3. TeleForm Enterprise

TeleForm Enterprise is designed for the large-scale and high-volume processing demands of large companies or deployments. TeleForm Enterprise provides functionality geared towards high-end, robust deployments. The multi-user configuration allows for the addition of more than 20 modules comprising Designers, Scan Stations, Readers and Verifiers to increase the efficiency and capability of the system.

TeleForm Enterprise includes all the features available in TeleForm Desktop and TeleForm Workgroup and several additional features including:

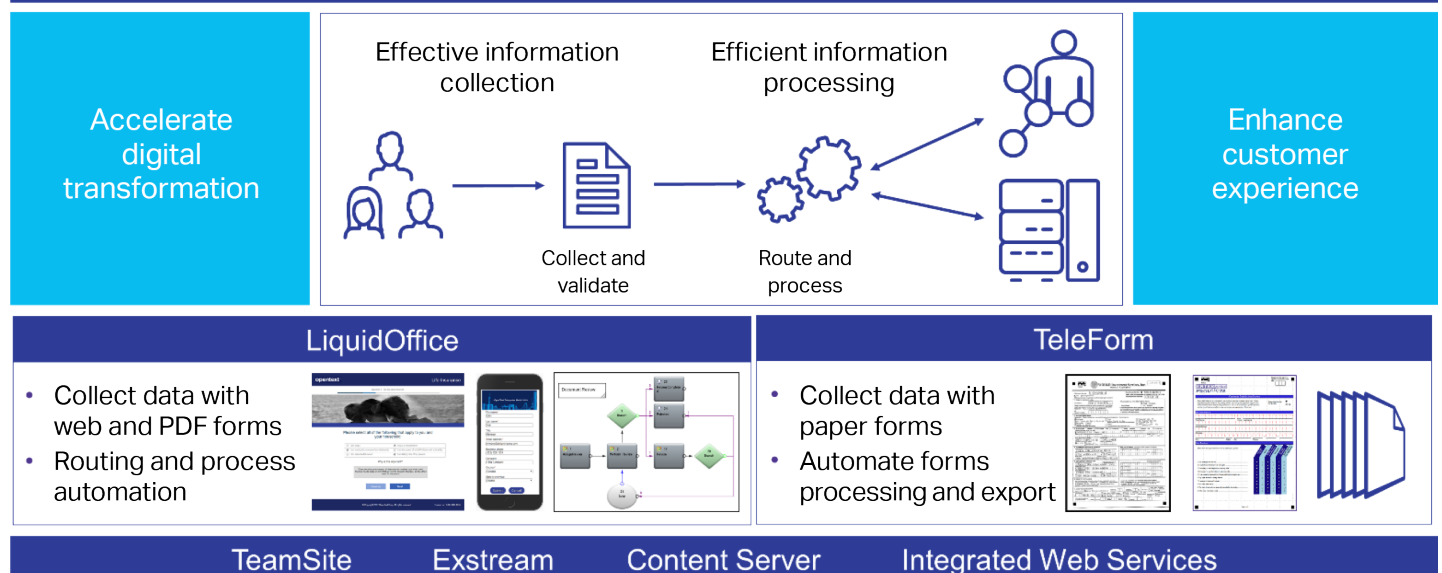
- LDAP integration with Microsoft® Active Directory®.
- Form folder, batch subdirectory and batch-owner group security.
- Auditing and custom reporting.
- Clustering support.

The screenshot displays the TeleForm Enterprise software interface. At the top, a menu bar includes 'File', 'Correction', 'View', 'Options', 'Utilities', 'Window', and 'Help'. Below the menu is a toolbar with various icons. The main form area is titled 'Personal Information' and contains fields for 'First Name' (NORMAN), 'Last Name' (STAMM), 'Address' (3429 KINNEY STREET, SPRINGFIELD, MO 65819), 'City' (SPRINGFIELD), 'State' (MO), 'Zip' (65819), and 'Email' (NORMANSTAMM@WORLDINVESTMENT.COM). The form is being filled out by a user named 'NORMAN STAMM'. Below the main form, there is a 'Credit Application Form' section with fields for 'Business Information', 'Bank References', and 'Trade References'. The bottom of the screen shows a 'Work History' section with a table for tracking employee activity.

OpenText Intelligent Forms Automation with TeleForm features

Designer	Build information gathering templates to collect any type of data and add fields, drawing objects, graphics and business rules to templates Add business rules, data collection, indexing fields, automatic exports and other special functions with simple check box controls
Scan Station	Turn completed forms into high quality batches, requiring minimum quality control, which the TeleForm Reader and Verifier modules can process
Batch processing	Handle larger groups of documents efficiently and accurately
Reader	Evaluate and classify image files, document types and data automatically, eliminating the need for manual sorting Reader uses the OpenText's RecoFlex recognition technology to interpret hand print (ICR), machine print (OCR), bar code and check box (OMR) data entry fields
Verifier	Check or correct any data entry fields that were not evaluated with enough confidence, perform quality control on batches and collect information in capture zones
AutoMerge publisher	Distribute customized documents via printer, fax or as email attachments to collect data or distribute customer communication information
Remote Capture Station	Create batches of images (e.g. batches of forms and document sets) and perform quality control from remote locations Send image batches to the main TeleForm system for evaluation, verification and data export
Web Capture	Allow users anywhere in the world to create batches and submit them to the Web Capture Server TeleForm reads the batch files and puts them through a regular batch processing sequence, which includes identification, evaluation, quality control, indexing, verification and export
Mobile Web Capture	Capture images on a smartphone and submit to TeleForm for processing Add business rules, data collection and indexing fields, automatic exports and other special functions with simple check box controls
Control Center	Use Control Center to change global TeleForm settings, customize individual workstations, create new job settings for batch processing, track workload, configure alerts and obtain a working overview of the entire TeleForm system
Localization	Scan, recognize and index in dozens of languages, from Spanish and French, to Vietnamese and more
Export	Export documents and data to DMS, RMS, DBs and other systems

Intelligent Forms Automation



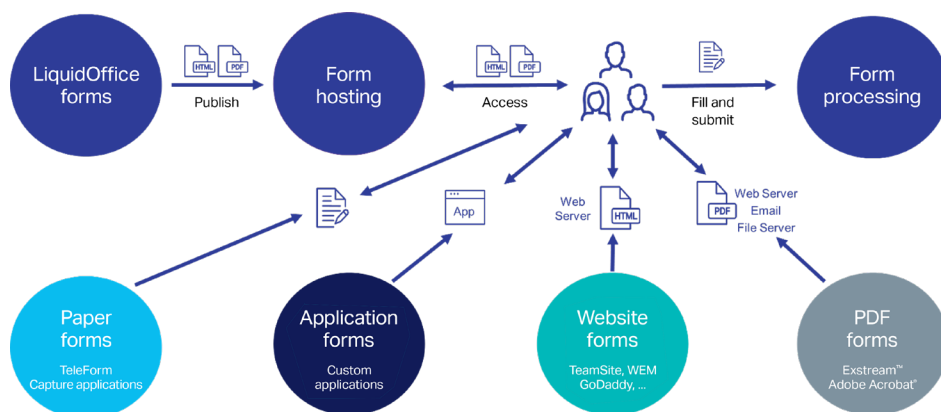
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Intelligent Forms Automation integrated solutions

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