

## System Requirements - fileSMART

The following are minimum and recommended system requirements for fileSMART. Whilst the program will operate on the minimums listed, we strongly suggest you meet or exceed the **recommended** requirements to ensure performance of your system is suitable for your agency operations. Please note that any environment or operating system not specifically mentioned here should be considered not supported.

The requirements for memory and processors are indicative only and more RAM or disk space may be required when running Rockend products in conjunction with other software. Please consult a qualified network technician to ensure that your network is adequately sized and tuned for the number of users and applications used by your agency.

System Requirements - fileSMART .....	1
Server Requirements.....	2
Server Operating System .....	2
Terminal Server Requirements .....	3
Terminal Server Operating System .....	3
Microsoft SQL Server .....	3
Workstation Requirements .....	4
Workstation Operating System .....	4
Microsoft Office .....	4
Rockend Recommends .....	4
Printers .....	5
Network Connectivity.....	5
Networks Not Supported.....	5
Wireless Networks .....	5
Wide Area Network (WAN).....	5
IPsec (Internet Protocol Security) .....	5
Proxy Servers and Corporate Firewalls .....	5
Memory Considerations.....	5
Virus Scanning.....	6
Common settings in virus scanners that impact performance:.....	6
Microsoft Outlook and fileSMART Archive.....	6
Email Server.....	6
Documents to Portals .....	6
Scanning Hardware.....	6
USB Desktop Scanner .....	6

Multifunction Device.....	6
MFD User Address Defaults.....	7
Property Trust Database.....	7
Network Diagram for MFD Scan Paths .....	8

## Server Requirements

fileSMART allows multiple users to run the software concurrently on different computers all accessing the same database. The data may be located on either a peer server, or a dedicated server.

In peer server environments the faster the peer server the better the performance for connected network users. For sites with five or more concurrent operators a dedicated server is recommended dependant on expected loads.

	Minimum	Recommended
Processor	Intel Core i3 2.1GHz	Intel Core i5 2.6GHz
RAM	4Gb	8Gb
Hard Disk	100Gb free	200Gb free
Network	1000mb TCP/IP networking	1000mb TCP/IP networking

## Server Operating System

Recommended and supported	Windows Server 2008 Windows Server 2008 R2 Windows Server 2012 Windows Server 2012 R2 Windows 7 Professional, Enterprise, Ultimate (x86/x64) Windows 8 Standard, Pro, Enterprise (x86/x64) Windows 8.1 Windows 10 Ensure all Operating Systems have the latest Service Pack installed.
Not supported	Operating systems not mentioned above <u>are not supported</u> .
Regional Settings	Time/Date must be current System locale set to English (Australia) Short Date format set to dd/mm/yy or dd/mm/yyyy
Web browser	Internet Explorer version 9 or above.
UDP Broadcast	UDP Broadcast must not be blocked on the network where fileSMART is installed.

### Terminal Server Requirements

	Minimum	Recommended
Processor	Xeon processor(s) Maximum 4 users per Core	Xeon processor(s) maximum 2 users per Core
RAM	Base of 4GB plus 512MB per user	Base of 8GB plus 1 GB per user
Hard Disk	100GB free	200GB free

### Terminal Server Operating System

Recommended and Supported	Windows Server 2008 Windows Server 2008 R2 Windows Server 2012 Windows Server 2012 All with Terminal Services and with latest Service Pack
Not supported	Operating systems not mentioned above <u>are not supported</u> .

It is recommended that if you are using a terminal server in your environment, that you put the fileSMART data on that Terminal Server. The processing speeds will be faster as you are taking the network out of the equation.

### Microsoft SQL Server

Minimum	Recommended
<p>Microsoft SQL Server 2008 Express R2</p> <p><b>Notes:</b></p> <p>Where SQL Server is not installed Rockend will install SQL Express 2014, a no cost limited version of SQL Server.</p> <p>SQL Server Express will use 1 processor socket.</p>	<p>Microsoft SQL Server 2014 Express</p> <p><b>Notes:-</b> <i>SQL Server Standard edition would only be required when client data reaches more than 10GB.</i></p> <p><i>Express versions of SQL Server only utilise one physical processor if multiple CPUs exist and a maximum of 1GB of RAM even if more exists.</i></p>

## Workstation Requirements

	Minimum	Recommended
Processor	Intel Core i3 2.1GHz	Intel Core i5 2.6GHz
RAM	2Gb	8Gb+
Hard Disk	100Gb free	200Gb + free
Network	1000mb TCP/IP networking	1000mb TCP/IP networking
Display	1280 x 960	1280 x 960

## Workstation Operating System

Recommended and supported	Windows 7 Professional, Enterprise, Ultimate (x86/x64) Windows 8 Standard, Pro, Enterprise (x86/x64) Windows 8.1 Windows 10
Not supported	Operating systems not mentioned above are not supported.
Web Browser	Internet Explorer version 10 or above.
UDP Broadcast	UDP Broadcast must not be blocked on the network where fileSMART is installed.

## Microsoft Office

To utilise Microsoft Office integration functionality with fileSMART, one of the following versions of Microsoft Office is required. FileSMART now supports both 32bit and 64bit Microsoft Office.

Minimum	Full installation of Microsoft Office 2007 – Service Pack 3 minimum
Recommended	Full installation of Microsoft Office 2013

## Rockend Recommends

- Install enough processing power, RAM and hard disk space in your server to cater for all applications and services that are being run. These requirements may vary depending on the number of users on the system, applications running and level of usage. Consult your network technician for more details.
- Disabling of screen savers if the computer is the 'data server' for fileSMART
- Optimise your virus scanner (Excluding fileSMART application and Data files)
- Ensure that you have offline backup capability that is used on a regular basis – daily at minimum.
- Rockend follows Microsoft's product lifecycles. If Microsoft has discontinued support, so have Rockend. Refer to <http://www.microsoft.com/windows/lifecycle.asp> for Microsoft's Windows Desktop and Server Product Lifecycle Guidelines.

## Printers

fileSMART operates with most standard printers that are supported by your operating system.

## Network Connectivity

- Ensure you have a stable LAN with adequate latency and bandwidth.
- For local area networks, we recommend investing in Gigabit switches.
- Cabling will impact significantly on the reliability and speed of your software. Ensure that the cable specification (UTP Cat 5, UTP Cat5e, UTP Cat6) is the appropriate type for the networking hardware installed.
- We recommend that only necessary protocols are loaded on both the server and workstation.
- Disable User Account Control (UAC).
- Database and printer connection paths (UNCs) should not contain full stops.

## Networks Not Supported

### Wireless Networks

Using fileSMART on a wireless network, will severely impact the speed of which fileSMART can process data to and from the data source. Wireless networks that are prone to drop outs will be problematic for the fileSMART database.

### Wide Area Network (WAN)

Using fileSMART on a WAN, will severely impact the speed of which fileSMART can process data to and from the data source.

### IPsec (Internet Protocol Security)

Severely impacts the data transfer for fileSMART

### Proxy Servers and Corporate Firewalls

For connections through Proxy Servers or Corporate Firewalls, network configuration details will be made available for customers to assist them with configuring any unique networks.

## Memory Considerations

The amount of Random Access Memory (RAM) in your workstations also has a major impact on the speed of your software. The more RAM in your workstations, the better your software will perform - and the more productive you will be.

How much memory you need to run effectively on a workstation depends on many factors, including:

- The operating system you are using
- The software applications you are using concurrently, e.g. Microsoft Outlook, Word and Excel, Rockend software and any other software. The more applications you are using, the more memory you will need.

## Virus Scanning

It is extremely important that your agency is protected from virus infection. However, it is also important that your virus scanning does not impact the performance of your network and software.

To know if your virus scanner is causing performance problems in your Rockend software, as a test, temporarily disable virus scanning on all workstation and the server, including any memory resident scanning. If performance increases once scanning is disabled, consult your network engineer about optimising virus scanning so that performance is not impacted.

Common settings in virus scanners that impact performance:

- If a virus scanner is installed on both your server and workstation, and both are set to scan both incoming and out-going files, you may be scanning each file twice.
- If the option is available in your virus scanning software, disable heuristic scanning.

In all cases, consult your network engineer to determine the best virus scanning solution for your practice that does not impact software.

## Microsoft Outlook and fileSMART Archive

Sending emails from the fileSMART Archive client and using the Outlook Plugin to save emails to fileSMART Archive will work with Outlook 2007, 2010 and 2013. The 64 bit versions of Outlook 2007, 2010 and 2013 are now support with version 7.0 of fileSMART.

## Email Server

FileSMART requires a standard SMTP email server. This can be an internal Microsoft Exchange server or your ISP's mail server. Email servers requiring encryption and non-standard ports, such as Google's "G5" service, are supported.

## Documents to Portals

If you are utilising the Documents to Portals features within fileSMART, Microsoft Word will need to be installed on the Rockend Communicator Server to facilitate the serving of Word documents through the Documents to Portals service.

## Scanning Hardware

### USB Desktop Scanner

We recommend the use of one or more dedicated USB 2.0 scanners with a document feeder and duplexing capability similar to the Kodak i2400, Kodak i2600, Canon DR-3010C, Canon DR-4010C, or Epson GT-S80 for use with fileSMART. The scanner must also have TWAIN driver software. For a dedicated USB scanner, please refer to the workstation hardware and workstation operating system sections listed in this document.

### Multifunction Device

A multifunction device (MFD) can be used for scanning if it supports scanning to PC and it is capable of being configured with multiple user profiles each of which can send scans to a specific shared folder on the user's

workstation. **The MFD must be configured to create black and white TIFF files at 300dpi with Group 4 fax compression.**

If the MFD does not meet these requirements, it is not satisfactory for achieving the most efficient document workflow in your office.

The MFD must be configured with an address for each person intending to use fileSMART Archive. Each user may already have an address in the MFD for emailing but a new address should be added called for example 'Lisa Archive'.

#### MFD User Address Defaults

The user address defaults on the MFD must be set to the following values:

- Black and white
- TIFF image file format
- Group 4 fax compression
- 300 dpi (dots per inch resolution)
- A4 paper size
- The destination folder for each address should send the scan to the C:\AS\_FILES\Queue\[WindowsUserName] folder on the user's computer, where [WindowsUserName] is the user's Windows login on that computer.
- If there are multiple login profiles on a workstation, there will be multiple [WindowsUserName] folders.
- If fileSMART Archive is accessed from Terminal Server then the destination must be C:\AS\_FILES\Queue\[WindowsUserName] for that user's terminal server profile.
- The scans must not go into a subfolder of the [WindowsUserName] folder.

#### Property Trust Database

Property, Owner, and Tenant codes in your trust database should not have a space as the first character of the code.

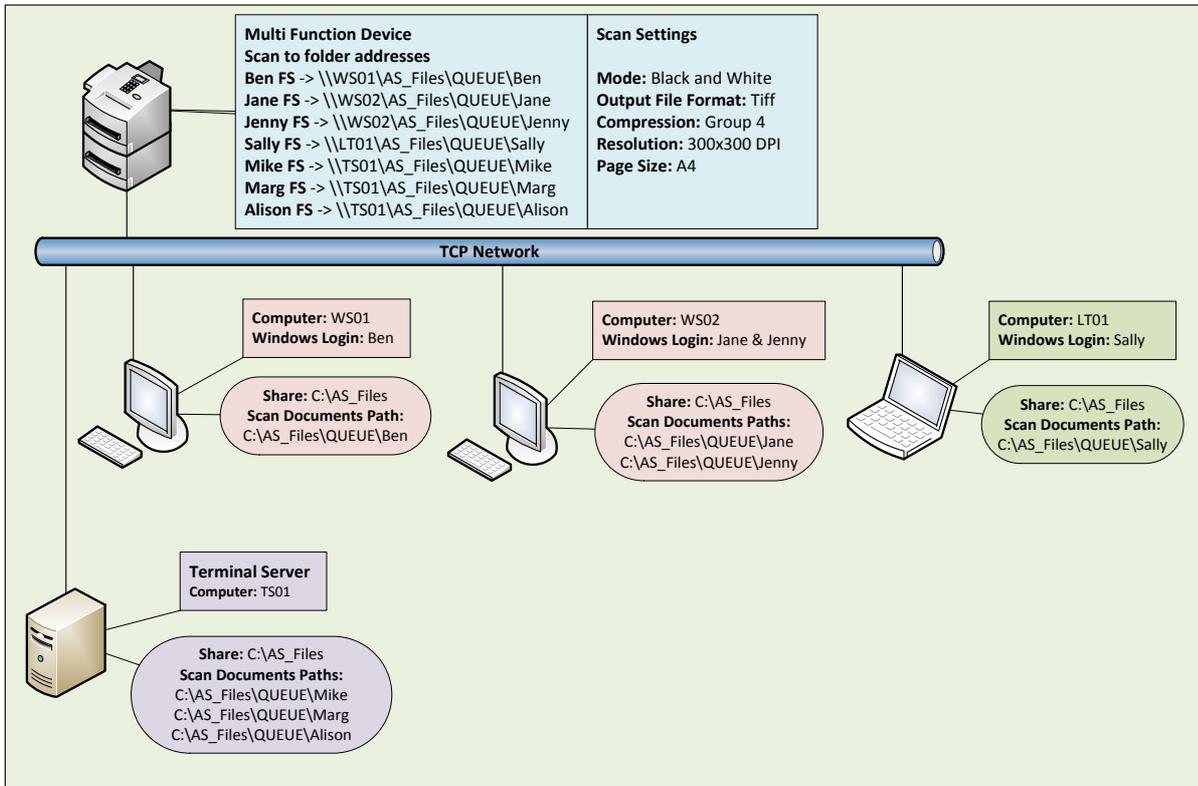
fileSMART allocates documents to owners based on the Owner Code in your trust database. For correct operation of the software, you must ensure that individual owners in your trust database have unique owner codes. This is also necessary for Properties, Tenants, and Creditors.

#### Note for REST Users:

To assist with the unique codes requirements, please ensure that 'Enforce Unique Alphas' has been enabled in your Rest Professional software. If you are unsure about where to find this setting, or require assistance or information about the ramifications of turning this option on, please contact Rest Support on 1300 657 700 or email [restsupport@rockend.com.au](mailto:restsupport@rockend.com.au).

## Network Diagram for MFD Scan Paths

### Overview of MFD Scan Paths for fileSMART



The diagram shows how the scan paths should be set up on an MFD at a site that has the fileSMART Archive software installed on individual computers and/or a terminal server. When fileSMART Archive is open on a user's workstation or terminal services session, it continually looks at the scan documents folder and moves any files it detects to the correct place on the fileSMART Server. It also updates the database with the name of the file and the identity of the user in whose pending queue it belongs.

The MFD scan settings must be: **B&W, TIFF, multipage, 300dpi, group 4 fax compression, A4**. Some MFDs allow these settings to be saved as part of the user's address, e.g. 'Jane FS', so all the users have to do is select their address and press the Start/Scan button. If your MFD doesn't have this capability it may be possible to save the scan settings as a 'Favourite', so when scanning for fileSMART all the users have to do is select their address e.g. 'Jane FS', then select the Favourite setting e.g. 'fileSMART', and press the 'Start' or 'Scan' button, and the scan will be sent to the correct location and be the correct file format.

The person setting up the MFD should demonstrate to the users the correct operation for fileSMART scanning.

The recommended workflow is for the user to log in to fileSMART Archive on their computer or terminal server session. They then take the paper documents to the MFD and scan them. In most cases, by the time the user returns to their computer the scan files will have been added to their pending queue. The user should then archive the files.