# CollectMax™ System Requirements

## 1.    Server

### A.    Dedicated File Server Layouts

This is the most common and recommended solution for new CollectMax installations for stability and performance. Windows Server 2003*, Windows Server 2008, Windows SBS 2011, Windows Server 2012, and Windows Server 2012-R2 are supported as dedicated server network solutions.

Windows Server 2000* continues to be supported for existing CollectMax licenses installed prior to May 15, 2013.

Please refer to the table below:

| Windows Server Version | | CPU | Memory | Storage |
|---|---|---|---|---|
| Server2003* | Minimum | 133 MHz | 2 GB | 1.5 GB |
| | Recommended | 733 MHz or ^ | 4 GB | 10 GB or ^ |
| Server 2008 | Minimum | 1.4 GHz | 2 GB | 10 GB |
| | Recommended | 2 GHz or ^ | 8 GB or ^ | 40 GB or ^ |
| SBS 2011 | Minimum | 2 GHz | 8 GB | 32 GB |
| | Recommended | 2 GHz or ^ | 10 GB or ^ | 120 GB |
| Server 2012 | Minimum | 1.4 GHz | 2 GB | 160 GB |
| (includes R2) | Recommended | 3.1 GHz or ^ | 16 GB or ^ | 160 GB or ^ |
| Server 2016 | Minimum | 1.4 GHz | 2 GB | 160 GB |
| | Recommended | 3.1 GHz or ^ | 16 GB or ^ | 160 GB or ^ |

**\*-** Server 2000 and Server 2003 are no longer supported by Microsoft.

CollectMax installations migrating to a new server environment should contact JST to verify that their ADS version will run on their new server platform.

Server requirements depend on the workstation machines, number of workstations, and amount of data traffic.  It is recommended that the server have at least as much RAM, preferably double the amount of RAM, and be as fast as the CPU on the fastest workstation machine. Systems supporting 10 or more workstations should have minimum of 4 GB RAM.

For systems supporting 25 or more workstations, JST strongly recommends the use of a file server that is exclusive to the CollectMax program and associated database software.

**B.**     **Peer to Peer Layouts**

Peer-to-peer licenses are limited to a maximum of 5 workstations. Requirements for the computer that is housing the CollectMax data are the same as what is required for the workstation. Refer to section 2.A. of this document for workstation requirements.

The Peer-to-Peer server must have an approved version of the Windows Operating System and at least 2 GB RAM. Additional hard drive space may be required depending on data size.

**C.**     **Advantage Database Server**

A third-party software license called Advantage Database Server (ADS) is required to be installed on your server in order to run CollectMax across your network. ADS is provided by JST along with the CollectMax installation files.

It is required that all customers run a current release of ADS supported by CollectMax in order to receive program updates, enhancements, or additional modules. JST will send an upgrade notification when and if the ADS license needs to be upgraded.

For planning purposes, figure on 1 GB of server hard drive space for the CollectMax program and the ADS program. Though data size can vary between installations, 3 GB per every 10,000 accounts can be used for planning purposes. Be sure to consider hard drive space for any imaging files that may be stored on the server if you plan to use the imaging module along with CollectMax.

Existing customers should contact JST when planning a server change or upgrade to ensure that the ADS version and configuration are correct.

Windows SBS 2011 and Windows Server 2012 require ADS version 11.x or higher.

Windows SBS 2012 R2 requires at least ADS 11 version 11.10.0.22 or newer.

Installations running Windows 64 bit servers are required to have ADS version 11.x or higher for 64 bit.

Please be aware that ADS 11.x–32 Bit is not compatible with Windows 10–32 Bit nor Windows 10-64 Bit.

*As of April 1, 2018, JST will not be able to update any installations that are not running ADS version 12.x.*

**D.**     **Networking Options**
Only Windows networking options are supported. **Novell Netware is no longer supported for new CollectMax installations.**

Wide Area Network (WAN) configurations are not supported. Citrix and Microsoft Terminal Services (MSTS) are recommended for those customers requiring an application server environment.

JST support staff will assist in configuring CollectMax to operate in a Citrix or MSTS environment. However, we do not have the expertise to configure the terminal host for user sessions. The successful configuration of the terminal host rests solely on the customer. Connections from workstations to servers must support TCP/IP protocol that can be validated from each workstation using a "PING [ServerName]" command.

## 2.     **Workstation**

**A.**     **Workstation Requirements**
Listed below are both the minimum and recommended workstation configurations for using CollectMax. The CPU speed applies to both Intel and AMD processors.

| Windows Version | | CPU | Memory | Storage |
|---|---|---|---|---|
| **Windows XP** | Minimum | 1.6 GHz | 64 MB | 1.5 GB |
| **Pro w/SP2*** | Recommended | 3 GHz or ^ | 128 MB or ^ | 1.5 GB or ^ |
| **Vista** | Minimum | 1.6 GHz | 1 GB | 20 GB |
| **Business/Ult.** | Recommended | 3 GHz or ^ | 2 GB or ^ | 40 GB or ^ |
| **Windows 7** | Minimum | 1.6 GHz | 1 GB | 20 GB |
| **Pro or ^** | Recommended | 3 GHz or ^ | 4 GB or ^ | 40 GB or ^ |
| **Windows 8** | Minimum | 1.6 GHz | 1 GB | 20 GB |
| **Pro or ^** | Recommended | 3 GHz or ^ | 4 GB or ^ | 100 GB or ^ |
| **Windows 10** | Minimum | 1.4 GHz | 2 GB | 20 GB |
| **Professional** | Recommended | 3 GHz or ^ | 4 GB or ^ | 100 GB or ^ |

Please note, local users MUST have Full Control permissions on the application folder (C:\Program Files\JS Technologies).

All other MS Windows versions not listed here, including mobile specific versions, are not supported.

Netbooks cannot be used for running CollectMax due to their resolution and RAM limitations.

Some CollectMax features require .NET Framework version 4 to run.

\* Windows XP Professional is no longer supported by Microsoft.

# 3. External Programs

### A. <u>Word Processing</u>
Microsoft Word 2007-2016 (including Office 365), or Corel WordPerfect 9.0-12.0, X3, X5, X6, X7, or X8 are required to be installed on each PC.

Corel X5 requires Service Pack 2 in order to interface with CollectMax. Corel WordPerfect X4 is not compatible with CollectMax.

Some installations may experience compatibility issues between Corel WordPerfect and some versions of Windows. If so, Microsoft Word may be the recommended word processor. Either MS-Word or Corel WordPerfect must be selected as the default word processor for all systems using CollectMax. All workstations must use the same version of the selected word processor.

### B. <u>CollectMax Features that Require MS-Excel</u>
CollectMax contains both standard and optional features that require the use of Microsoft Excel. For example, many reports offer the option to output the report to an XLS file format. In order to use such features, it is required that the user have Microsoft Excel 2007-2016 (including Office 365) installed on their workstation.

Simple Data Extraction (CollectMax versions 2 and above), MaxExtract (CollectMax version 6 and above), and CollectMax reports that can be generated to MS-Excel format require MS-Excel 2007-2016 to open the reports once they have been generated.

### C. <u>QuickBooks Cost Export</u>
The QuickBooks Cost Export function (CollectMax version 6 or higher with checkwriting enabled) requires QuickBooks versions 2012-2018 and either the Pro, Premier, or Enterprise edition. The QuickBooks Online edition is not supported.

# 4. Support and Maintenance

### A. <u>Remote Support Requirement</u>
In order for us to provide you with timely technical support, a communications program called LogMeIn Rescue is used by our support staff as a means of connectivity. Customers are required to have high speed internet access in order for our technicians to access their PC remotely. Dialup connections are not supported. LogMeIn

Rescue provides end-to-end 256-bit SSL encryption for compliance with HIPAA, Sarbanes-Oxley and other federal and local legislation.

This service allows our technicians to connect to any client workstation and/or server in your office at no cost to your firm in a matter of seconds. No pre-installation of software is needed. Internet access is required for connection as the end user will need to enter a PIN number given to them by the technician at the LogMeIn123.com website. The end user will also be required accept the connection.

In the event of a support problem relating to a particular workstation, there may be an occasion where it is necessary to connect directly to that computer in order to offer a solution.

Other methods of remote connection are not supported.

**B.**     **<u>Daily Backup Procedure</u>**
A daily backup procedure to a removable storage media is highly recommended for all users, especially for network systems.  A full backup of the CollectMax folder and imaging folder (for Customers with the Document Management Module) should be part of a Daily Backup Program.

A minimum of five sets of removable backup media, one for each day of the work week, is suggested.

Incremental and differential backups are not recommended. Backups should not be performed while users have CollectMax running.

**C.**     **<u>Uninterruptible Power Supply</u>**
An uninterruptible (battery back-up) power supply (UPS) is <u>required</u> on the server unit for <u>network based systems</u>.  Due to the high risk of data loss and file damage, CollectMax programs running on a network without a UPS on the server cannot be supported.

Specifications are subject to change without notice.                    Specifications updated 11/17/2017