

Client Profiles Case & Financial Management System Requirements Version 8.6

The following recommendations were developed as a guideline for technologies supported by Client Profiles related software. Individual consultations are recommended.

**All Microsoft products are required to have the latest Service Packs and critical updates. Microsoft 2000 products are NOT supported with any Client Profiles Version 8.6 related software.*

Workstation

Intel Core processor family.

1GB RAM minimum.

1GB available disk space.

Video card and monitor with 1024 x 768 resolution or higher.

Microsoft Windows XP Pro, Vista, and 7 (excluding home editions).

Internet Access on at least one workstation with TCP/IP.

Microsoft .Net Framework 3.5.

Application or File Server

Microsoft Windows Server 2003 or Server 2008. (64bit supported)

Microsoft .Net Framework 3.5.

SCSI Drives, utilizing a redundant disk subsystem, are recommended.

Backup System is recommended.

30 gigabytes minimum of available disk space on the File server for storage of new documents and emails. This does not include any existing data. Actual disk space recommendations should be determined through discussion with a Client Profiles team member.

Processor and Memory

Memory requirements increase to the recommended amount as the minimum if server is multi-purpose.

30 Users or Less: Intel Xeon Dual Core processor or higher
Memory: 4GB or higher

30 - 100 Users: Intel Xeon Quad Core or higher
Memory: 4GB minimum 8GB or higher recommended

100 - 250 Users: 2 Intel Quad Core processors
Memory: 8GB minimum

250 + Users: IT Discussion is recommended

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SQL	Microsoft SQL Server 2005 or 2008 and Client Licenses. SQL Server Express 2005 and 2008 is NOT supported.
Virtual Private Networks	IT discussion required. Bandwidth requirements are to be determined by Firm's Network Vendor.
Virtualization	Hyper V and VM Ware supported. IT discussion required.
Exchange Integration	Microsoft Exchange 2003 or 2007. Microsoft MSMQ service on integration host server. Microsoft IIS v6 or higher on integration host server. Microsoft WSE 3.0 Runtime on integration host server. Microsoft Messaging API and Collaboration Data Objects 1.2.1 on integration host server.
Word Processor	Microsoft Office 2003 or 2007. Corel WordPerfect 11 or higher. (Latest maintenance updates required)
PDA Functionality	Mobile Devices that synchronize with Microsoft Exchange/Outlook will integrate with Client Profiles Appointments and Contacts as part of the Client Profiles Exchange Integration.

NOTE: While an individual network or system may run in an environment that does not meet these specifications, we cannot guarantee its level of performance and/or reliability if these requirements are not met.

Requirements