



FORMVERSE

FORMVERSE TECHNICAL REQUIREMENTS ON-PREMISE CONFIGURATION

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FORMVERSE SYSTEM COMPONENTS

1. **FORMVERSE REGISTRY SERVER** (Web Service) Provides access to forms, FORMVERSE users and dispatching & processing rules required by FORMVERSE components. A second instance of the FORMVERSE Registry Server can be installed in a “Shadow Mode” configuration on a separate server. This will allow “outside-the-network” users to have access to specific and limited functionality and to ensure compliance with security requirements.
2. **MICROSOFT OUTLOOK ADD-IN** Provides users access to forms, the ability to take action on forms, as well as access to history right from their Microsoft Outlook email client. (.msi package or .exe formats). Only required for Microsoft Outlook 2010. Optional for Outlook 2013/2016.
3. **FORMVERSE ADMINISTRATION CONSOLE** Implemented as a standard Microsoft Management Console snap-in, this module provides the administration interface for all FORMVERSE components. Here administrators can orchestrate a FORMVERSE deployment and manage the Workflow Template, Accounts and FORMVERSE database.
4. **FORMVERSE TEMPLATE EDITOR** Implemented as a standard Microsoft Management Console snap-in, this module provides the administrators the ability to create and modify FORMVERSE Workflow Templates.
5. **FORMVERSE DATABASE (MS SQL SERVER)** Stores and serves the FORMVERSE Workflow Templates to end-users as and all form data and metadata. Installed as a new database on a new or existing SQL Server instance. (Created during installation).
6. **FORMVERSE WORKFLOW TEMPLATES** A FORMVERSE Workflow Template is the container that holds all of the components that are used to automate a single business process.



HARDWARE AND SOFTWARE REQUIREMENTS

This document describes the hardware and software requirements for an on-premise installation where the FORMVERSE software and its components are installed on servers or virtual servers at your data center or at your hosting provider. This guide provides only a high-level overview of the requirements as the software is highly configurable to meet each customer's specific needs.

Important note: Generally, the FORMVERSE Software is installed in two or more phases:

- 1) Phase 1: Test/Sandbox Environment
- 2) Phase 2: Production Environment.

During installation in the Test/Sandbox environment, the Software is normally installed on two servers. In the Production Environment, the FORMVERSE Software is normally installed on three servers, unless the it is configured in "Shadow Mode", in which case four servers are used. However, FORMVERSE is quite configurable. For example, servers 1 and 2 below can be bound together and servers 3 and 4 can be bound together. Therefore, the actual number of servers required will be determined based upon review of the final system architecture requirements. The following tables represent a typical installation in a Production Environment, including configuration in Shadow Mode, as well as possible variation for installation in a Test/Sandbox environment.



SERVER 1 (FORMVERSE REGISTRY SERVER)

(REQUIRED)

SERVER 1 – REQUIRED PRE-INSTALLED COMPONENTS

Physical or Virtual (VMware or Hyper-V)

Processor Intel Xenon 2.40 GHZ 2V CPU Minimum

Ram 16-32 GB (PROD) 12-16 GB (Test/Sandbox)

Hard Drive 200 GB minimum (Production) 80 GB Minimum (Test/Sandbox)

Microsoft Windows Server 2008 Standard or Enterprise, 2008 R2 Standard or Enterprise, 2012, Standard or Datacenter. Microsoft Windows Server 2016 will be supported upon release.

Microsoft IIS

Microsoft .NET Framework 4.5.2+

Static IP Address needed

For remote installation assistance, FORMVERSE will need access to servers via VPN or RDC

Enable IIS with security certificate. Allowed external access to the IIS. Windows Integrated security enabled. Open ports 47/80/443/1433 (1701 and 1723 requires if FORMVERSE is connecting by VPN for administrative purposes)

List active directory security group SQL User, SQL Admin, Remote Access, VPN Access, IUSR

Please Enable the following Role Services to Server 1:

- 1) Web Server
 - a. Common HTTP Features
 - i. Static Content
 - ii. Default Document
 - iii. Directory Browsing
 - iv. HTTP Errors
 - b. Application Development
 - i. ASP.NET
 - ii. .NET Extensibility
 - iii. ISAPI Extensions
 - iv. ISAPI Filters
 - c. Health and Diagnostics
 - i. HTTP Logging Request Monitor
 - d. Security
 - i. Windows Authentication
 - ii. Request Filtering
 - e. Performance
 - i. Static Content Compression
- 2) Management Tools
 - a. IIS Management Console
 - i. IIS 6 Management Compatibility
 - 1. IIS 6 Metabase Compatibility
 - 2. IIS 6 WMI Compatibility

Please Enable the following Features to Server 1:

- 1) .NET Framework 4.5.2+ Features
 - a. .Net Framework 4.5.2+
 - b. XPS Viewer
 - c. WCF Activation
 - i. HTTP Activation
 - ii. Non-HTTP Activation
- IIS Services Manager create the following app pool:
 - 1) Navigate to Start Page → (Server Name) → Application Pools
 - 2) Under actions, select “Add Application Pool”
 - 3) Enter the following information:
 - a. Name: “FORMVERSE”
 - b. .NET Framework version: “.NET Framework v4.5.2+”
 - c. Managed pipeline mode: “Classic”
 - d. Start application pool immediately: “Checked”

FORMVERSE INSTALLED COMPONENTS (SERVER 1)

FORMVERSE Registry Server Software (Web Service)



SERVER 2 – (FORMVERSE APPLICATION SERVER)

IMPORTANT NOTE: DURING INSTALLATION OF THE TEST/SANDBOX PHASE, THESE COMPONENTS MAY BE INSTALLED ON SERVER 1 (SERVER 2 NOT REQUIRED)

SERVER 2 – REQUIRED PRE-INSTALLED COMPONENTS

Physical or Virtual (VMWare or Hyper-V)

Processor Intel Xenon 2.40 GHZ 2V CPU Minimum

Ram 16-32 GB (PROD) 12-16 GB (Test/Sandbox)

Hard Drive 200 GB minimum (Production) 80 GB Minimum (Test/Sandbox)

Microsoft Windows Server 2008 Standard or Enterprise, 2008 R2 Standard or Enterprise, 2012, Standard or Datacenter. Microsoft Windows Server 2016 will be supported upon release.

Microsoft IIS

Microsoft .NET Framework 4.5.2+

Static IP Address needed

For remote installation assistance, FORMVERSE will need access to servers via VPN or RDC

Enable IIS with security certificate. Allowed external access to the IIS. Windows Integrated security enabled. Open ports 47/80/443/1433 (1701 and 1723 requires if FORMVERSE is connecting by VPN for administrative purposes)

List active directory security group SQL User, SQL Admin, Remote Access, VPN Access, IUSR

Please Enable the following Role Services to Server 2:

- 1) Web Server
 - b. Common HTTP Features
 - i. Static Content
 - ii. Default Document
 - iii. Directory Browsing
 - iv. HTTP Errors
 - c. Application Development
 - i. ASP.NET
 - ii. .NET Extensibility
 - iii. ISAPI Extensions
 - iv. ISAPI Filters
 - d. Health and Diagnostics
 - i. HTTP Logging Request Monitor
 - e. Security
 - i. Windows Authentication
 - ii. Request Filtering
 - f. Performance
 - i. Static Content Compression
- 3) Management Tools
 - a. IIS Management Console
 - i. IIS 6 Management Compatibility
 - 1. IIS 6 Metabase Compatibility
 - 2. IIS 6 WMI Compatibility

FORMVERSE INSTALLED COMPONENTS (SERVER 2)

FORMVERSE Administration Console Software

FORMVERSE Template Editor Software

FORMVERSE PASSPORT Software



SERVER 3 – SQL SERVER INSTANCE

REQUIRED

SERVER 3 – REQUIRED PRE-INSTALLED COMPONENTS

Microsoft SQL Server (Standard or Enterprise): 2008 with SP4, 2008 R2 with SP3, 2012 with SP3, 2014 with SP2, or 2016. SQL Server Express not supported.

FVAdmin Domain Account Created and given "dbcreator" role with the SQL instance supporting Mixed Authentication (SQL Authentication and Windows Authentication).

FILESTREAM Access Level should be set to "Full access enabled" in the Server Properties Advanced tab within SQL Management Studio.

In SQL Server Configuration Manager in the FILESTREAM tab enable the following: 1) Enable FILESTREAM for Transact-SQL access. 2) Enable FILESTREAM for file I/O streaming access. 3) Allow remote clients to have streaming access to FILESTREAM data.

FORMVERSE INSTALLED COMPONENTS (SERVER 3)

FORMVERSE SQL SERVER DATABASE (FORMVERSE installation will create the FORMVERSE database on the installed instance of SQL Server)

SERVER 4 (FORMVERSE REGISTRY SERVER-SHADOW MODE)

IMPORTANT NOTE: ONLY REQUIRED IF SHADOW MODE IS REQUIRED

SERVER 4– REQUIRED PRE-INSTALLED COMPONENTS

Physical or Virtual (VMWare or Hyper-V)

Processor Intel Xenon 2.40 GHZ 2V CPU Minimum

Ram 16-32 GB (PROD) 12-16 GB (Test/Sandbox)

Hard Drive 200 GB minimum (Production) 80 GB Minimum (Test/Sandbox)

Microsoft Windows Server 2008 Standard or Enterprise, 2008 R2 Standard or Enterprise, 2012, Standard or Datacenter. Microsoft Windows Server 2016 will be supported upon release.

Microsoft IIS

Microsoft .NET Framework 4.5.2+

Static IP Address needed

FORMVERSE will need access through to servers via screen share (VPN and RDP access is preferred)

Enable IIS with security certificate. Allowed external access to the IIS. Windows Integrated security enabled. Open ports 47/80/443/1433 (1701 and 1723 requires if FORMVERSE is connecting by VPN for administrative purposes)

List active directory security group SQL User, SQL Admin, Remote Access, VPN Access, IUSR

Please Enable the following Role Services to Server 4:

- 2) Web Server
 - b. Common HTTP Features
 - i. Static Content
 - ii. Default Document
 - iii. Directory Browsing

Please Enable the following Features to Server 4:

- 2) .NET Framework 4.5.2+ Features
 - a. .Net Framework 4.5.2+
 - b. XPS Viewer
 - c. WCF Activation
 - i. HTTP Activation
 - ii. Non-HTTP Activation



<ul style="list-style-type: none"> iv. HTTP Errors c. Application Development <ul style="list-style-type: none"> i. ASP.NET ii. .NET Extensibility iii. ISAPI Extensions iv. ISAPI Filters d. Health and Diagnostics <ul style="list-style-type: none"> i. HTTP Logging Request Monitor e. Security <ul style="list-style-type: none"> i. Windows Authentication ii. Request Filtering f. Performance <ul style="list-style-type: none"> i. Static Content Compression 4) Management Tools <ul style="list-style-type: none"> a. IIS Management Console <ul style="list-style-type: none"> i. IIS 6 Management Compatibility <ul style="list-style-type: none"> 1. IIS 6 Metabase Compatibility 2. IIS 6 WMI Compatibility 	<p>IIS Services Manager create the following app pool:</p> <ul style="list-style-type: none"> 4) Navigate to Start Page → (Server Name) → Application Pools 5) Under actions, select “Add Application Pool” 6) Enter the following information: <ul style="list-style-type: none"> a. Name: “FORMVERSE” b. .NET Framework version: “.NET Framework v4.5.2+” c. Managed pipeline mode: “Classic” d. Start application pool immediately: “Checked”
FORMVERSE INSTALLED COMPONENTS (SERVER 4)	
FORMVERSE Registry Server configured in Shadow Mode	

USER DESKTOPS
REQUIRED PRE-INSTALLED COMPONENTS
Microsoft Windows 7, 8, 8.1 or 10
Processor 2.00 GHZ CPU Minimum
Ram 4 GB Minimum
Microsoft Outlook 2010, 2013, 2016 or Browser-based Outlook 365
FORMVERSE INSTALLED COMPONENTS (User Desktop)
FORMVERSE Outlook Add-in (Not required for Outlook 2013/2016/Office 365 (Browser-based) email)

OTHER REQUIREMENTS
Create FVAdmin email account in Exchange. This account will be used as the notification engine for FORMVERSE. FVAdmin should also be an administrator on Servers 1-2.