



## ExDoc 3

Technical Requirements

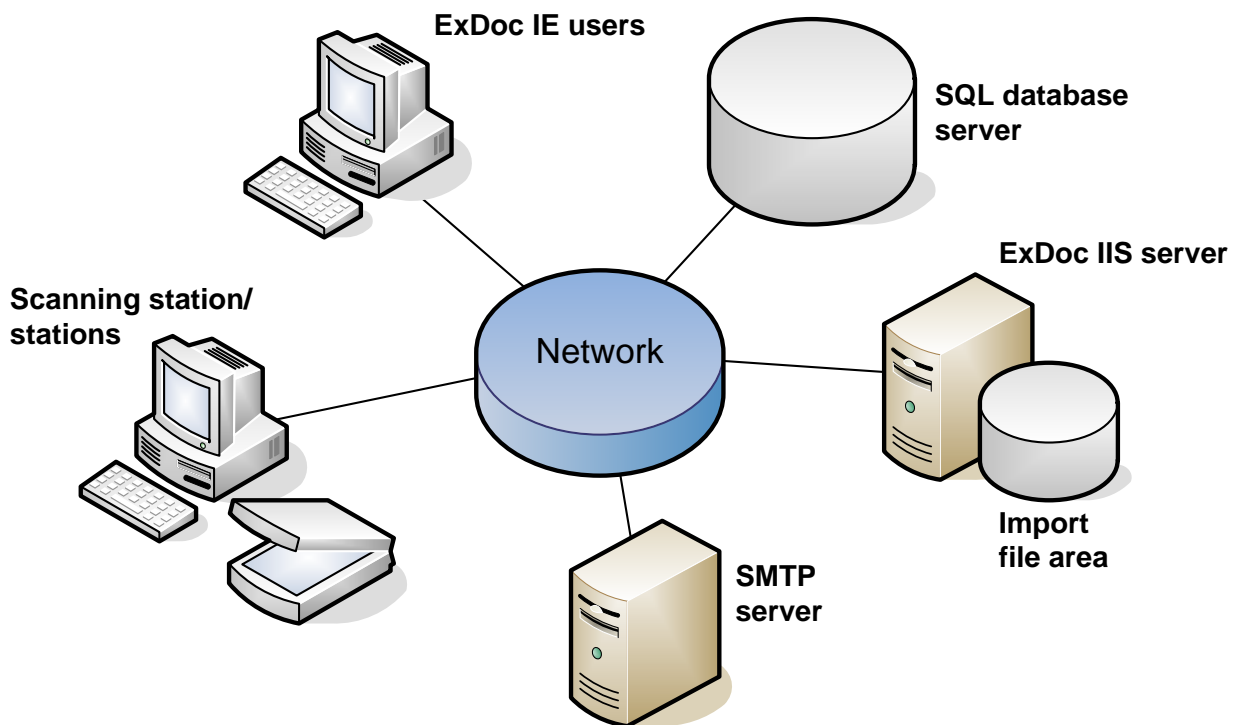
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## Introduction

ExDoc is a web based application that makes it possible to scan and register agreements and contracts to a database. As ExDoc is a SQL based application, search functions can retrieve data from the database according to user specified search criteria. ExDoc has a built-in reminder function that helps the user by sending an e-mail when certain time triggered events occur such as an upcoming cancellation date for a contract. For a user administering thousands of agreements/contracts, ExDoc becomes a tremendous work saver.

For more information or help with your installation please contact: [support@signupsoftware.com](mailto:support@signupsoftware.com)

## How ExDoc works



A basic overview of ExDoc operations can be summarized as follows:

1. Documents are scanned at a scanning station. The resulting PDF image files are saved at an import file area, known by ExDoc.
2. A user logged in to ExDoc via an IE browser, views the document image and registers information (metadata) pertaining to the document.
3. When the document is registered the image and metadata are saved to a database. The original image file is then deleted from the Import file area.
4. When time triggered events occur such as contract renewal dates, a reminder function in ExDoc sends an e-mail via a local SMTP server to notify the user of this upcoming event.

## Technical requirements for installation

The following technical specifications are the pre-requisites for the installation of the ExDoc database and web application. Note: The Customer is responsible for having the right license and support agreements with Microsoft.

### Operating System

- Windows Server 2008 or 2012, any version with at least 4 GB memory.
- There are no special requirements for the web server hardware.

### Server Requirements for ExDoc Web

- The Web Server must run IIS and be configured for use. The Web Server Role should be added and configured with all the basic web Role Services including Windows Authentication.
- Make sure that the Web Server has ASP.NET and .NET Extensibility Role Services installed.
- Microsoft .NET Framework 4.5 must be installed and available in IIS (IMPORTANT).

### Server Requirements for ExDoc Database

- Microsoft SQL Server 2008, 2012 or 2016, any version.
- Allow for up to 4GB data storage.

### General Installation Notes:

- The web server should not have the domain controller role.
- The file system should be NTFS.
- Use dedicated manual IP addresses for the server.
- Running an additional web application on the same web server such as SharePoint will increase the resource requirements significantly.
- The Web server can run as a virtual server under VM-Ware or Hyper-V.

### ExDoc Client Software

- Clients can be Windows 7, 8 or 10, Apple Mac with OS X.
- Internet Explorer 11 and the latest versions of Edge, Chrome, Firefox and Safari are supported.
- For Single sign on, the browser must include the ExFlow Web site as an "Intranet" and support IIS Windows Authentication and users must be members of the Active Directory Domain.
- Adobe Acrobat Reader 9.0 or later should be installed and configured as an add-in for the IE11 browser.

NOTE: Reader does not support "In web page display" for the 64-bit version of Internet Explorer.

### Supporting equipment

A scanner is needed for creating the image files. This can be a manual solution or a fully automatic one.

### **Reminder Sender**

ExDoc uses an application called Reminder Sender (RS). RS is a freestanding application that accesses the ExDoc database. RS enables ExDoc and external users to receive reminders via e-mail regarding agreements that need attention at specific times or intervals. This relieves the user from having to keep track of coming events.

However, because e-mail is sent using SMTP, which in itself is not a secure or guaranteed way of sending information, ExDoc has no way of verifying that an e-mail has reached its intended destination. To verify that the delivery of reminder e-mails, have been successful, the Windows Event Viewer of the sending server should be checked regularly. It is also possible to send a CC of all reminder mails, to an ExDoc administrator, so getting confirmation that the service is working properly.