



## 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 2016, Windows Server 2019, and Windows Server 2022 are supported as dedicated server network solutions.

Network Attached Storage (NAS) devices are not recommended as a server solution due to latency and limitations in functionality. NAS devices are suitable as a backup location but not as the primary database location.

Please refer to the table below:

Windows Server Version		CPU	Memory	Storage
<b>Server 2016</b>	Minimum	1.4 GHz	2 GB	160 GB
<b>Server 2019</b>	Minimum	1.4 GHz	2 GB	160 GB
<b>Server 2022</b>	Minimum	1.4 GHz	2 GB	160 GB

Microsoft recommendations state that the highly diverse scope of potential deployments makes it unrealistic to state "recommended" system requirements that would be generally applicable. Consult documentation for each of the server roles you intend to deploy for more details about the resource needs of particular server roles. For the best results, conduct test deployments to determine appropriate system requirements for your particular deployment scenarios.

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.

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

server platform. JST can provide instructions for migrating the CollectMax installation and data to a new server environment.

**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.

JST is not be able to update any installations that are not running ADS version 12.x. 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 notify customers when an ADS license version upgrade is needed.

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 compatible.

**D. Networking Options**

Only Windows networking options are supported. Novell Netware is not supported for new CollectMax installations.

Wide Area Network (WAN) configurations are not supported. Citrix and Microsoft Remote Desktop Services (RDS), also referred to as Microsoft Terminal Services (MSTS), are recommended for those customers requiring an application server environment.

Connections from workstations to servers must support TCP/IP protocol that can be validated from each workstation using a "PING [ServerName]" command.

Setup and configuration of user logins/connections to the Remote Desktop Server is solely the firm's responsibility. Please consult with your IT department for assistance.

Please refer to the CollectMax™ Remote Environment FAQ document for more details.

## 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.

<b>Windows Version</b>		<b>CPU</b>	<b>Memory</b>	<b>Storage</b>
<b>Windows 10</b>	Minimum	1.4 GHz	2 GB	20 GB
<b>Professional</b>	Recommended	3 GHz or ^	4 GB or ^	100 GB or ^
<b>Windows 11</b>	Minimum	1.4 GHz	2 GB	20 GB
<b>Professional</b>	Recommended	3 GHz or ^	4 GB or ^	100 GB or ^

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.

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

## 3. External Programs

### A. Word Processing

Microsoft Word 2016, 2019, and 2021 (only 2021 is supported in connection with Microsoft 365), or Corel WordPerfect 2020 and 2021 are required to be installed on each PC.

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. CollectMax Features that Require MS-Excel**

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 2016, 2019, and 2021 (only 2021 is supported in connection with Microsoft 365).

**C. QuickBooks Cost Export**

The QuickBooks Cost Export function (check writing module must be enabled) requires QuickBooks Desktop versions 2020-2024 and either the Pro, Premier, or Enterprise edition. The QuickBooks Online edition is not supported.

**D. JST SmartData**

JST SmartData, a secondary MS-SQL data set that is updated incrementally so building it daily will be quick and easy. JST SmartData can be read and queried by the Customer to be used for reporting and other data needs outside of CollectMax™. It is also the foundation for Provana's IPA (IPERFORM Analytics) integration. Provana's IPA requires that Customer enter into an agreement with Provana, which is separate from any agreements with JST.

JST SmartData requires that the Customer have an MS-SQL license 2016 or higher. Earlier MS-SQL versions are not permitted because they do not support newer features required for this application. MS-SQL requires Windows 8 or later operating systems. The MS-SQL license should be installed on a separate server from the ADS server license as it could impact processing speeds.

For Customers using JST SmartData for Provana's IPA dashboards and not for other reporting capabilities, JST recommends generating the 'JST SmartData Lite' data set. This will result in a more efficient seed and syncing process as well as a smaller data set. For smaller data sets, a free MS-SQL Express license may be a solution. MS-SQL Express license has a size limit of 10 gigabytes or less.

JST SmartData is available to CollectMax customers with a support contract. Contact JST Sales for more details.

## **4. Support and Maintenance**

**A. Remote Support Requirement**

In order for us to provide you with timely technical support, a communications program called Rescue by GoTo 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. Rescue by GoTo 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. Daily Backup Procedure**

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. Uninterruptible Power Supply**

An uninterruptible (battery back-up) power supply (UPS) is required on the server unit for network-based systems. 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.

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Specifications are subject to change without notice.

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