

General Notes

- Operating systems and configuration options not listed on this page are *not* supported.
- Advent tests products with the latest service packs. If a product requires a specific service pack, it's noted.
- Advent provides performance and capacity guidelines for planning purposes only. Because many variables affect the performance of your system and the size of your data files, Advent assumes no liability for hardware purchase decisions. Please consult your systems consultant about specific configuration decisions.
- You can install Advent Portfolio Exchange (APX) 3.0 in a two-server or a three-server configuration. In a two-server configuration, there is a database server and a separate application server that runs all other services, including IIS Web services. In a three-server configuration, you break out the IIS Web services to run on a machine other than the application server, providing for a separate database, application, and Web server. To support a larger number of concurrent users, you can add additional application and Web servers. To handle more simultaneous report requests, you can add additional report servers.
- **Important:** Server requirements vary based on a machine's function. If a server will support more than one function, it must meet the minimum requirements for each function, as if it was a dedicated server. For example, if you use one machine as your Application/Web Host server and your Packager Document Conversion server, verify that the machine meets the minimum requirements for each of those functions.
- These requirements also apply to Rex Release 4.3.

Server Requirements



Database Server

Hardware	See the "Server Capacity Planning" section.
Operating System	Microsoft Windows 2003 Server, Standard or Enterprise Edition (Service Pack 2 or later), 32-bit or 64-bit version. Note: Advent recommends you use a 64-bit operating system if you plan to use the APX SSRS reporting feature. Note: Support for Microsoft Windows 2008 Server is planned for a future release of APX 3.0.

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Database Server

Software

- Microsoft SQL Server 2008, Standard or Enterprise Edition, Service Pack 1 or later, 32-bit or 64-bit version, or Microsoft SQL Server 2005, Standard or Enterprise Edition, Service Pack 2 Package 9 (9.00.3282.00) or later, 32-bit or 64-bit version.
Note: Microsoft SQL Server 2008 R2 is NOT supported. Support for Microsoft SQL Server 2008 R2 is planned for a future release of APX.
Note: Microsoft SQL Server delivered as part of Small Business Server is NOT supported.
Note: To use the APX SSRS reporting feature, you must install Microsoft SQL Server 2008.
Note: If you install a 64-bit Microsoft operating system, you must install a 64-bit version of Microsoft SQL Server.
Your choice for database collation varies:
 - If you are upgrading from APX 2.0, you must continue to use the same database collation.
 - If you are installing APX for the first time and do not integrate with Moxy, the recommended collation is Latin1_General_CI_AS. These Greek and Western European language collations are also supported:
Danish_Norwegian_CI_AS
Finnish_Swedish_CI_AS
French_CI_AS
German_Phonebook_CI_AS
Greek_CI_AS
Icelandic_CI_AS
Modern_Spanish_CI_AS
 - If you use Moxy, the database collations in Moxy and APX must match; nevertheless, the collation types can vary. For details, see KB Article 32546.
- Microsoft SQL Server Native Client
- Microsoft SQL Server Reporting Services (SSRS) 2008—required for the APX SSRS reporting feature only
- Microsoft SQL Server 2008 Client Tools with Business Intelligence Development Studio (BIDS)—required for the APX SSRS reporting feature only
- Microsoft .NET Framework Version 3.5 (Service pack 1 or later)

Database Clustering

- Database server clustering is supported for:
- No more than two nodes.
 - A single physical storage device (single quorum device server cluster). Disks in the storage device are typically redundant (Example: RAID 10).
 - Active-Passive configurations only.

Application and Web Host Server

Hardware

See the “Server Capacity Planning” section.

Operating System

Microsoft Windows 2003 Server, Standard or Enterprise Edition (Service Pack 2 or later), 32-bit or 64-bit version.
Note: Advent recommends you use a 64-bit operating system if you plan to use the APX SSRS reporting feature.
Note: If you install a 64-bit Microsoft operating system, you must install a 64-bit version of Microsoft .NET Framework. Also note that the 64-bit versions of Microsoft Windows 2003 Server Standard and Enterprise Editions include a 64-bit version of Microsoft Internet Information Services (IIS) 6.0.
Note: Support for Microsoft Windows 2008 Server is planned for a future release of APX 3.0.

Application and Web Host Server

Software	<ul style="list-style-type: none"> ■ Microsoft Internet Information Services (IIS) 6.0 ■ Microsoft .NET Framework 3.5 (Service Pack 1 or later) Note: Microsoft .NET Framework 3.5 is inclusive of Microsoft .NET Framework 2.0 and 3.0. ■ Microsoft Message Queuing ■ Microsoft SQLXML 4.0, downloadable from http://www.microsoft.com ■ Microsoft MSXML 4.0 (Service Pack 2 or later), downloadable from http://www.microsoft.com ■ Microsoft Excel 2003 or 2007 Professional Edition for saving report output in XLS format ■ Microsoft Word 2003 or 2007 Professional Edition for print-merge functionality
Network Services and Communication Protocols	<ul style="list-style-type: none"> ■ For larger installations, Advent recommends a network bandwidth of at least 1 Gbps between the database and application servers. For smaller installations, Advent recommends a network bandwidth of at least 100 Mbps between the database and application servers. ■ Servers and client workstations must be members of a domain. APX does not support workgroups. ■ For remote VPN users (using DSL, or cable internet from home), Advent recommends at least 1.5 Mbps connections. ■ For remote users, APX 3.0 supports front-office reporting and client management activities, but does not support back-office functions, such as posting transactions, scripting, or using Dataport.

(Optional) Report Server

You can add report servers to the environment to increase reporting capabilities for sites with many users and/or heavy report packaging requirements. The standard Application/Web server supports six simultaneous report requests. Each additional report server supports six more simultaneous report requests. Depending on estimated peak usage, you can configure one or more report servers.

Hardware	See the “Server Capacity Planning” section.
Operating System	<p>Microsoft Windows 2003 Server, Standard or Enterprise Edition (Service Pack 2 or later), 32-bit or 64-bit version. Note: Support for Microsoft Windows 2008 Server is planned for a future release of APX 3.0. Note: If you install a 64-bit Microsoft operating system, you must install a 64-bit version of Microsoft .NET Framework.</p>
Software	<ul style="list-style-type: none"> ■ Microsoft .NET Framework 3.5 (Service Pack 1 or later) Note: Microsoft .NET Framework 3.5 is inclusive of Microsoft .NET Framework 2.0 and 3.0. ■ Microsoft Message Queuing ■ Microsoft SQLXML 4.0, downloadable from http://www.microsoft.com ■ Microsoft MSXML 4.0 (Service Pack 2 or later), downloadable from http://www.microsoft.com ■ Microsoft Excel 2003 or 2007 Professional Edition for saving report output in XLS format

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(Optional) Packager Document Conversion Server

You can use a separate Package Document Conversion server for creating packages.

Hardware	See the “Server Capacity Planning” section.
Operating System	Microsoft Windows 2003 Server, Standard or Enterprise Edition (Service Pack 2 or later), 32- or 64-bit version. Note: Support for Microsoft Windows 2008 Server is planned for a future release of APX 3.0.
Software	<ul style="list-style-type: none">■ Microsoft .NET Framework 3.5 (Service Pack 1 or later) Note: Microsoft .NET Framework 3.5 is inclusive of Microsoft .NET Framework 2.0 and 3.0.■ Microsoft Message Queuing■ Microsoft SQLXML 4.0, downloadable from http://www.microsoft.com■ Microsoft MSXML 4.0 (Service Pack 2 or later), downloadable from http://www.microsoft.com■ Microsoft Office 2007 Professional Edition for generic content conversion

(Optional) Exchange Server

You use an Exchange Server for Exchange-integration features (e-mail capture and synchronization of contacts, tasks, and meetings).

Hardware	For production environments, Microsoft only supports Exchange 2007 server roles on a computer that has a 64-bit processor. See http://www.microsoft.com for Microsoft Exchange 2007 requirements.
Operating System	Refer to product documentation available from http://www.microsoft.com .
Software	Microsoft Exchange 2007, 64-bit, Standard or Enterprise Edition (Service Pack 1 with Rollup 6 or later), with Web Services enabled.

Workstation Requirements



User Workstation

Operating System	<ul style="list-style-type: none">■ Microsoft Windows 7, Professional or Ultimate Edition, 32- or 64-bit version, or Microsoft Windows XP Professional (Service Pack 3 or later), 32-bit version, or Microsoft Windows Vista (Service Pack 1 or later), 32-bit version
Software	<ul style="list-style-type: none">■ Microsoft Internet Explorer 8.0 or 7.0■ Microsoft .NET Framework 3.5 (Service Pack 1 or later) Note: Microsoft .NET Framework 3.5 is inclusive of Microsoft .NET Framework 2.0 and 3.0.■ Microsoft Message Queuing for APX BackOffice Utilities■ Professional Edition <i>only</i> of either Microsoft Office 2003 (Service Pack 3 or later) or Microsoft Office 2007 (Service Pack 1 or later). From Microsoft Office 2003 or 2007 Professional Edition, you need these applications for optional APX features:<ul style="list-style-type: none">■ Microsoft Excel (Excel links from reports)■ Microsoft Outlook (Calendar, Inbox Views, and E-mail Management)■ Microsoft Word (APX Print-Merge and Packager)■ Microsoft Office 2003 Multilingual User Interface (for APX Packager reporting in non-US English characters)Note: For Microsoft Exchange integration (one-way or two-way Outlook synchronization), you can use either Microsoft Outlook 2003 or 2007. For Intellisync integration (one-way Outlook synchronization), you must use Microsoft Outlook 2003.■ Microsoft SQL Server 2008 Client Tools with Business Intelligence Development Studio (BIDS)—required for the APX SSRS reporting feature only

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Server Capacity Planning

Based on your firm's profile, refer to the following recommendations which reflect the minimum hardware necessary for optimal performance in your environment. When you are planning hardware upgrades, refer to the guidelines in the Upgrade Priority section. There you see the relative ranking of hardware components in terms of their impact on performance. Advent recommends that you consider these rankings when you plan your hardware upgrades.

	Environment 1: Up to 3,000 portfolios and 20 users	Environment 2: 3,000-10,000 portfolios and 21-50 users	Environment 3: 10,001-100,000 portfolios and 51-200 users
Database Server	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Total of two cores minimum ■ 4 GB RAM ■ 40 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Two processors minimum Total of four cores minimum Recommended: 64-bit, 2.8+ GHz ■ 4 GB RAM Recommended: 8GB RAM ■ 120 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	Please consult your Advent representative.
Application/ Web Server	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Total of two cores minimum ■ 2 GB RAM ■ 4 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Two processors minimum Total of four cores minimum Recommended: 64-bit, 2.8+ GHz ■ 4 GB RAM Recommended: 8GB RAM ■ 8 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	Please consult your Advent representative.
Report Server	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Total of two cores minimum ■ 2 GB RAM ■ 4 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	<ul style="list-style-type: none"> ■ 2.5+ GHz Intel Xeon or AMD Opteron processor Total of two cores minimum ■ 2 GB RAM ■ 8 GB of free disk space 10K RPM disk drives Recommended: 15K RPM disk drives. Use more disks in RAID array for better performance. 	Please consult your Advent representative.
Upgrade Priority	<ul style="list-style-type: none"> ■ Database server disks ■ Report server disks ■ Application/Web server disks 	<ul style="list-style-type: none"> ■ Database server disks ■ Database server CPU and memory ■ Report server disks ■ Application/Web server disks 	Please consult your Advent representative.
Printers	<p>Microsoft Windows-compatible printers. Note: This release of APX does not support printers with named printer trays for APX Packager. Contact Advent Support for a short-term workaround for this issue.</p>		

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Server Capacity Planning

Network

- Recommended network bandwidth for larger installations is 1 Gbps between the database and application servers, but at least 100 Mbps for smaller installations.
- Recommend at least 1.5 Mbps connections for remote users over VPN.
 - APX supports remote users who complete front-office reporting and client management tasks.
 - APX does not support remote users who complete back office tasks, such as downloading, posting, and scripting.
- The servers and client workstations must be members of a domain. APX does not support workgroups.

Compatible Advent Products



Advent Product	Release
Advent General Ledger Exchange	2.5
Advent Partner	5.0, 7.0, 7.1, 7.2
Advent Revenue Center	3.0, 3.1
Advent Warehouse	4.3

Advent Product	Release
DataExchange	3.0.1
DTCC Interface	6.0, 7.0
Moxy	6.0, 7.0
Rex	4.3

Backup and Recovery Strategy



As you set up your server environment, you must plan your backup and recovery strategy. This may include hardware and software for possible tape backup and mirroring. Microsoft SQL Server offers backup and restore services, but third-party software may work best for the backup of the Windows Server itself. Advent recommends that you discuss your backup and recovery strategy with your network consultant and IT department.

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Part number: APXSR30U1b

Release number: Release 3.0 Update 1

Publication date: June 2010

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