

## CLM Matrix Software v.7.3

### Hardware and Software Requirements

CLM Matrix recommends the following technical infrastructure to support a Matrix Software implementation. We encourage all of our clients to work directly with their Microsoft Account Executive to determine the appropriate licensing options associated with these requirements.

#### Hardware and Software Requirements

Two servers are recommended for production, a Web server and a Database server.

##### **A. Web Server Hardware Requirements**

The Web Server will host IIS (SMTP), Microsoft Office SharePoint Portal Server, and CLM Matrix. A dedicated MOSS web front-end server is required for CLM Matrix. The following table describes the hardware requirements for the servers.

<b>Operating System</b>	<b>Minimum Requirements</b>	<b>Recommended</b>
Microsoft Windows Server 2003 (32 bit and 64 bit are supported)	1 CPU 2 GB RAM	2 - 4 CPU 4-8 GB RAM

An additional server is recommended to be used as a Test/QA Server as this gives a place to test workflow/process changes before implementing in and without affecting the production environment.

##### **B. Software Requirements**

You must install the following software on your web server:

- Microsoft Windows Server 2003, configured as a Web server (running Internet Information Services 6.0 in IIS 6.0 worker process isolation mode) and running ASP.NET
- SMTP Services. Verify that IIS and SMTP services are running on SPS server (installation of SPS should verify this) ( Make sure that the SPS Server has the correct access to route SMTP email internally (and externally if needed))
- Microsoft Internet Explorer 5.5 sp2 or later
- Microsoft Office SharePoint Portal Server 2007

##### **C. Database Server Requirements**

In addition to the operating system and Web server software, you must also have a database installed on your server (a separate server is recommended (see web server hardware requirements above for specs)). The following databases are supported:

- Microsoft SQL Server 2005

### **D. Client Requirements**

- Microsoft Internet Explorer 5.5 sp2 or later
- Microsoft Office Professional 2003 (with PIA's) or Office 2007 Professional
- .NET Framework 1.1
- If client is going to be opening CLM Matrix built Smart Documents, each client will also have to add a .Net 1.1 computer security policy to allow their Word client to talk to CLM Matrix. This can be added via a batch file that is included in the Client installation procedures document. Clients must be local administrators / power users of their computers.

### **E. Service/Domain Accounts**

A service account will need to be created so CLM Matrix can use that account to run privileged code and access the SQL Server.

- Create a domain account for CLM Matrix service account (this account will need to be a member of the CLM Administrators group). This account will be used to perform functions of the CLM system that require higher security rights than the normal user, it can also be the account that is used for the IIS Application Pool identity.
  - (i.e.) *Domain\CLMAdmin*

Domain Groups will need to be created that CLM Matrix utilizes for access.

- Create CLM required Active Directory security group
  - CLM\_Users
  - CLM\_Auditors
  - CLM\_Coordinators
  - CLM\_Administrators