

Client Profiles Exchange Integration Requirements Version 8.6

This document is to be used in conjunction with the CP Case & Financial Management System Requirements version 8.6.

**All Microsoft products are required to have the latest Service Packs and critical updates. Microsoft 2000 products are NOT supported with any Client Profiles Version 8.6 related software.*

Exchange Server

Microsoft Windows Server 2003 or Server 2008. (64bit supported)

Microsoft Exchange 2003 or Exchange 2007.

Microsoft .Net 3.5.

Hosted Exchange is not supported.

The Microsoft Exchange server must reside in the same Windows Domain network as the Domain Controller for the user accounts.

Exchange Integration requires an Active Directory Account (Client Profiles Exchange Integration / Eventsink) with Exchange Mailbox to run integration services. One unique account per Exchange Server is required in multi exchange environments.

In Exchange System Manager 2003 Client Profiles Exchange Integration service account is required to have Full Control of any Mail Store containing mailboxes of Client Profiles integration users.

In Exchange Management Console 2007 the Client Profiles Exchange Integration service account is required to be added as an Exchange Server Administrator.

Exchange 2007 is configured by default to use "Auto Update" automated processing on user mailboxes. Exchange Integration requires this option to be set to "none". This option is administered using the Exchange Power Shell.

Client Profiles Exchange Integration service account will be created as part of the Exchange Integration installation process.

Client Workstation

Microsoft Windows XP Professional or Vista (excluding home edition).

Microsoft Office 2003 or 2007.

Microsoft .Net 3.5.

Microsoft Outlook 2003 requires the installation of the Collaboration Data Objects component. This is installed automatically with a complete installation of Office or Outlook.

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Microsoft Outlook 2007 and Word 2007 require the installation of the .Net Programmability Support component. This is installed automatically with a complete installation of Office or Outlook and Word.

Microsoft Office 2007 requires the installation of Microsoft Visual Studio Tools for the Microsoft Office system (version 3.0 Runtime) (x86).

Use of "Word" as the Email Editor is only supported with Microsoft Outlook 2007.

Microsoft Vista requires User Access Control (UAC) to be disabled.

Network Topology

All integration users require a unique Active Directory account with an Exchange mailbox.

All integration users are required to authenticate to workstations with their unique AD accounts which will be matched to a Client Profiles user account.

The Exchange Integration services require a host server meeting Client Profiles processor and memory requirements. It is preferred that the server does not also host Microsoft Exchange and/or Outlook. Firms using Microsoft SBS will require additional discussion.

The Exchange Integration host server requires the installation of IIS v6 or higher.

The Exchange Integration host server requires the installation of MSMQ with Active Directory integration.

Email Integration uses an IIS Web Service that requires a 32 bit app pool. If the host server is Server 2003 64 bit it will need to exclusively run 32 bit app pools.

The Email Integration service must be installed on the same server as the store folder for the associated emails.

Requirements