V1 Document Management

Invoice Automation for Microsoft NAV

Platform Requirements

09th August 2018

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Introduction

This document specifies the minimum platform requirements of the Invoice Automation for Microsoft NAV by V1 integration.

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You are encouraged to bookmark the Portal which is regularly updated with information about the release:

http://support.wearev1.com/software/NAV/

Standalone V1 Server

If the preference is to have a standalone V1 Server, the `core` Invoice Automation software includes the following modules:

Module	Description / Requirement
DbLogin	The authentication module
DbArchive	A file repository to store the scanned / imported images. There is a requirement to create an ODBC connection to the SQL server.
DbCapture	The OCR engine. There is a requirement for the server to be internet connected at least when the installation occurs to allow the ABBYY engine to be licensed.
V1 Smart Suite	The web portal to access and administrate SmartDeposit, SmartRetrieve and SmartMail.

The server can be a physical or virtual server, it needs uninterrupted TCP-IP connectivity to the Microsoft NAV database server and the following ports opened:

32000, 31417, 31418, 31450, 31451, 31452, 8444, 5002, 5012, 5024 & 6181.

The *minimum* requirements for a Server to run the core Invoice Automation components are:

Component	Specification
Processor	Quad Core (at least 2 cores dedicated @2.4GHz)
RAM	16 GB
Operating Systems	Windows 2008 up to 2012 Server 32 or 64 bit.
Disk Space	10 Gigabytes*
LAN	Min 100MB LAN to clients

The minimum requirements for the Database Server to run the core Invoice Automation components are:

SQL Server	2008 R2 or higher
Microsoft .NET Framework	4.6 or higher

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space.

Shared Installation with the Microsoft NAV Database Server

Often a preference to keep 'everything in the same place' it is now typical to have the V1 core software installed on the same server as the Microsoft NAV database server.

The V1 requirements for the server remain the same as the standalone, but their requirements need to be incrementally increased. For example if a requirement for Microsoft NAV server is:

Component	Specification
Processor	Dual Core
RAM	8 GB
Disk Space	5 Gigabytes

The server needs to have the *minimum* specification:

Component	Specification
Processor	6 Cores (at least 2 cores dedicated @2.4GHz)
RAM	24 GB
Operating Systems	Windows 2008 up to 2012 Server 32 or 64 bit.
Disk Space	15 Gigabytes*
LAN	Min 100MB LAN to clients
Microsoft .NET Framework	4.6 or higher

The OCR process is very processor and memory intensive so if the minimum specification (or better) is not adhered to, the installation will experience performance and reliability problems.

*Average image size is 60K – 100K per page: 20,000 pages per year = 2GIG of hard drive space.

Email Settings

Inbound

An inbound email is one that is received by the customer.

These emails can be archived, interrogated for attachments which are then themselves archived and if electronic Purchase Invoices as PDF's, go through the DbCapture software to be created in the Microsoft Dynamics NAV 2017 database.

This is facilitated by the V1 SmartMail application which is a webpage accessible via http://SERVERNAME:8444 when the V1 SmartMail service is running in config mode.

It supports a variety of technologies, but provided the address and authentication details are known:

Component	Specification
Mail Server	Supporting POP3 or IMAP / Gmail / Outlook 365
Mail Client	Outlook 2003 Onwards

Outbound

An outbound email is one that is sent via the customer's mail server.

This could be internally to staff members informing them of actions to take or that have been taken from within the integration, or to Vendors.

There is a binary that is fired with parameters, this must be allowed to 'relay' through the mail server so that emails can be sent.

Component	Specification
Mail Server	Supporting SMTP with or without authentication
dbmailsend.exe	Standalone binary

NOTE: *Relaying* of emails must be permitted via the existing mail server used by the customer.

Scanning and Hardware

In order to scan images into the system barcodes must be produced, attached to the document and scanned into the file repository.

From here they can be accessed from any user authorized to use the system.

The recommendations to allow image processing for EDM are:

Component	Specification
Scanner	Kodak recommended*
Barcode Printing	Desktop or Network Connected Zebra GKD 420d
Barcode Labels	Type A 55mm x 32mm**
Image Format	TIFF Grp IV 300dpi resolution
MFD	TIFF Grp IV 300dpi resolution

*For more details on scanning requirements, please see the documentation on the portal under the section 'Platform and Hardware Requirements > Scan Station'.

Barcode Printer

Zebra GKD 420d

Printer is connected to USB port on a user workstation, or on a network print server device on any computer on the network (including Microsoft NAV server).

The barcode printer must be 'shared' so it visible using Windows File Explorer *on* the V1 server.

Barcode Labels

The standard solution is optimized for Type A, but larger barcodes can be used (to accommodate longer transaction numbers).

Transactional Printers

Printers must be 'PDF enabled', so assuming printing from the command line:

copy mypdf.pdf \\myprintserver\mysharedprinter

Produces the result:

1 file copied.
The PDF prints to the printer specified.