



# Kofax PSIsafe Desktop Technical Specifications

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**KOFAX**

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## Chapter 1

# Introduction

Kofax PSIsafe Desktop is a simple, fast, and effective document management solution for small enterprises. The Kofax PSIsafe product line consists of several components designed to facilitate customer needs. The technical specifications in this document apply to the referenced Kofax PSIsafe 12.2 products listed below.

This document describes a required amount of resources. The requirements relate only to PSIsafe Desktop and do not include any amount of resources you may need for the operating system, environment, or other software that runs on the same computer. You must meet the requirements in this document to support your PSIsafe Desktop system.

This document provides the requirements for the following PSIsafe product line components:

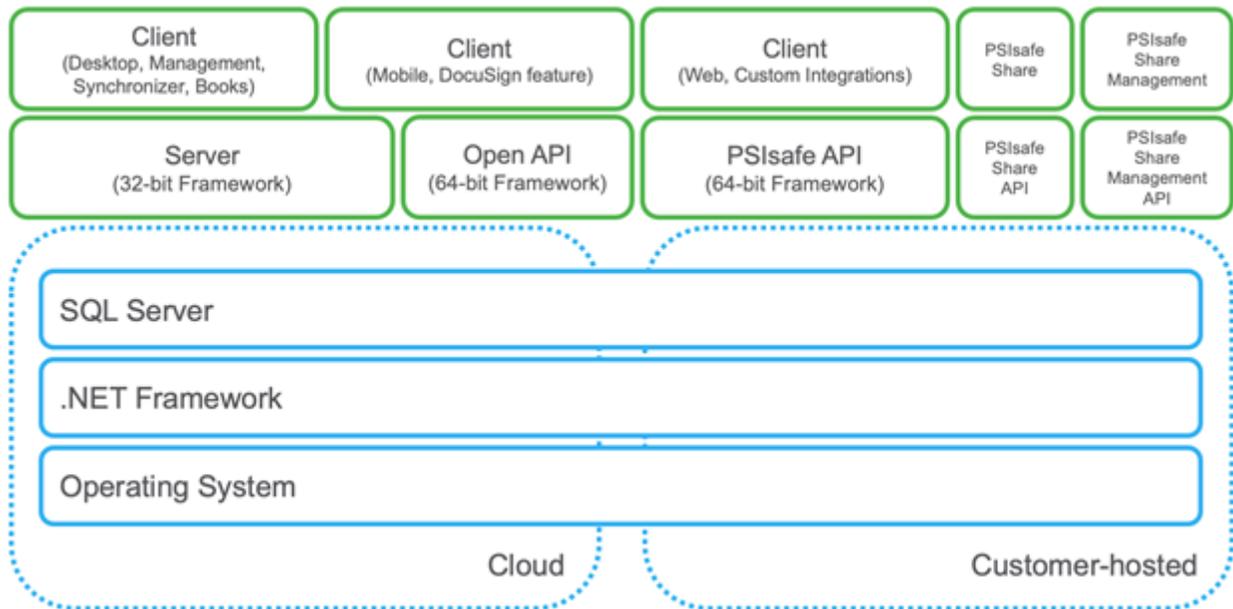
- Client software, including:
  - PSIsafe Desktop (thick) client
  - PSIsafe Web (thin) client
  - PSIsafe Mobile client
- PSIsafe Desktop Server
- PSIsafe API (Framework)
- PSIsafe Open API (Framework)
- PSIsafe Books
- PSIsafe Synchronizer
- PSIsafe PDF Forms Monitor
- PSIsafe Share (hosted by Kofax)

## Chapter 2

# System architecture

The PSIsafe Desktop product line is comprised of several components and allows for custom integrations. The product may be customer-hosted or hosted by Kofax as a cloud offering. The following diagram provides a general overview of the system architecture.

### PSIsafe product family system architecture



*Interconnection diagram of the PSIsafe product family system architecture*

## PSIsafe Desktop 32-bit Server

The PSIsafe Desktop client, PSIsafe Management, PSIsafe Synchronizer, and PSIsafe Books all interact with the 32-bit framework layer. Currently, more applications are being deployed on newer business layers, such as the PSIsafe Open API and the PSIsafe API. However, all PSIsafe applications rely, at least indirectly, on the PSIsafe Desktop server installation for database provisioning, licensing, and management.

## PSIsafe Open API and x64 Server (Framework)

This application bundle is the second generation technology in the PSIsafe business layer, supporting key features within the PSIsafe product line, such as PSIsafe Mobile and the PSIsafe DocuSign integration. Both customer-hosted and cloud-hosted solutions are supported. For cloud customers, this service is already provisioned with no installation necessary.

## PSIsafe API and Server (Framework)

This application bundle is the third generation technology in the PSIsafe business layer, extending the PSIsafe Desktop Server application and allowing client-facing applications to access the PSIsafe ecosystem. Both customer-hosted and cloud-hosted solutions are supported. For cloud customers, this service is already provisioned with no installation necessary.

## PSIsafe Share

PSIsafe Share is a cloud-based software-as-a-service that enables PSIsafe Desktop users to post documents in a user's Share folder through the PSIsafe Desktop client application. These documents may be easily accessed through the web-based PSIsafe Share portal provided to the Share user through email. PSIsafe Desktop client users interact with PSIsafe Share through the WCF API.

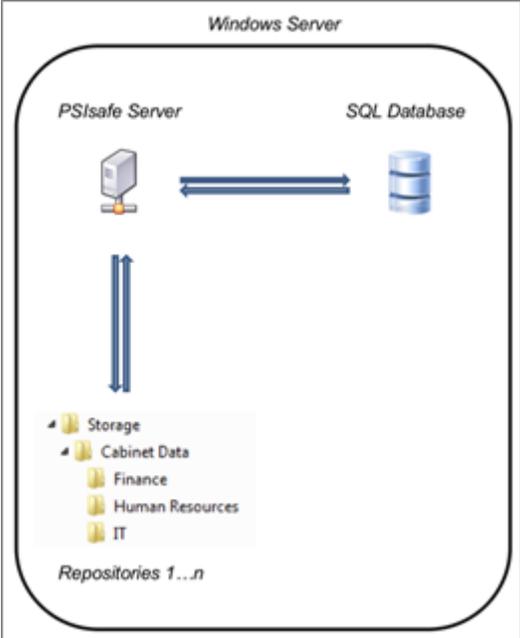
Both customer-hosted and cloud-hosted customers can use this SaaS-based offering to facilitate sharing of content. The Kofax Cloud Services team manages customer tenancy using the PSIsafe Share Management portal.

PSIsafe Desktop can be configured in a number of different configurations.

# Example 1

One server is used to host the PSIsafe Desktop Server, SQL server, and repository instance. This configuration is often used for demonstration environments, and can be used for testing environments.

## PSIsafe Desktop system configuration 1

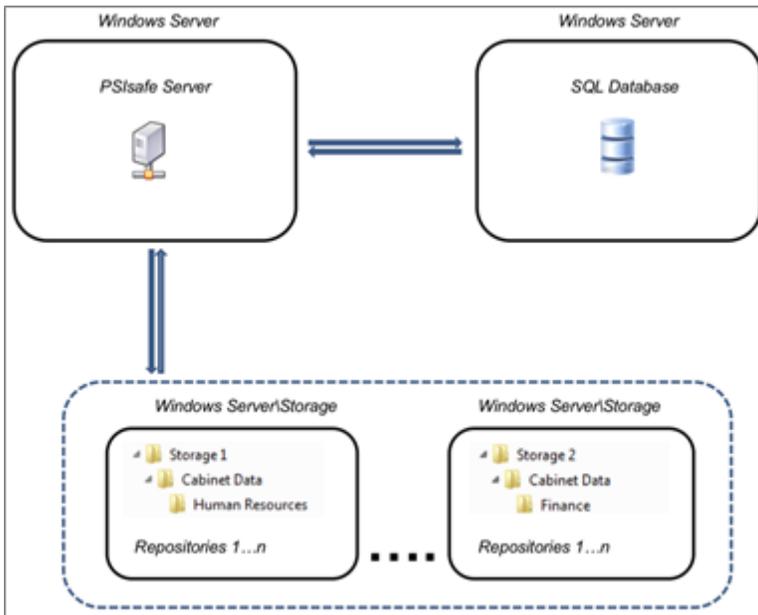


*Relationship of PSIsafe Server, SQL database, and repository files*

## Example 2

PSIsafe Desktop Server and SQL Server are installed on separate servers, and the repositories reside on one or more server/storage devices. This configuration is generally used in medium- to large-sized installations.

### PSIsafe Desktop system configuration 2



*Relationship of PSIsafe Desktop Server, SQL database, and repositories in separate environments*

## Chapter 3

# Product requirements

## PSIsafe Desktop 12.2 (Thick client)

The PSIsafe Desktop application offers a content management platform for filing, searching, and processing documents and storing attached metadata in a SQL database, while providing full traceability. Using PSIsafe Management, you can provision content structures as well as template, security, and retention profiles.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Hardware	<ul style="list-style-type: none"><li>• 8 GB RAM</li><li>• 1 GB free disk space</li><li>• Minimum supported resolution is 1366 x 768. In some cases, scaling may affect performance.</li></ul>
Accessibility	<ul style="list-style-type: none"><li>• High-speed Internet recommended</li></ul>
Client operating systems	<ul style="list-style-type: none"><li>• Microsoft Windows 11</li><li>• Microsoft Windows 10</li></ul>
Required third-party technologies	<ul style="list-style-type: none"><li>• Microsoft .NET Framework 4.8 or higher</li></ul>
Compatible third-party technologies	<ul style="list-style-type: none"><li>• Microsoft Office or other Windows-based applications (for viewing/editing documents)</li></ul>
Required Kofax software	<ul style="list-style-type: none"><li>• Kofax PSIsafe Desktop Server 12.2</li></ul>
Compatible Kofax software	<ul style="list-style-type: none"><li>• PSIsafe Desktop Open API and x64 Server (Framework) 12.2</li><li>• PSIsafe Desktop Books 11.4</li><li>• PSIsafe Desktop Share 2.0 (hosted by Kofax)</li></ul> <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"><li>• English (US)</li></ul>

## PSIsafe Web 12.2 (Thin Client)

The PSIsafe Web application offers a web-based experience for filing and searching documents in PSIsafe Desktop, while providing full traceability. You can use PSIsafe Management to define the required settings.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Browser	<ul style="list-style-type: none"><li>• Google Chrome 100 and higher</li><li>• Mozilla Firefox 100 and higher</li><li>• Microsoft Edge 16 and higher</li><li>• Apple Safari 11 and higher</li></ul>
Accessibility	<ul style="list-style-type: none"><li>• High-speed Internet recommended</li></ul>
Compatible third-party technologies	<ul style="list-style-type: none"><li>• Microsoft Office or other Windows-based applications (for viewing/editing documents)</li></ul>
Required Kofax software	<ul style="list-style-type: none"><li>• Kofax PSIsafe Desktop Server 12.2</li><li>• Kofax PSIsafe API (Framework) 12.2</li></ul>
Languages supported	<ul style="list-style-type: none"><li>• English (US)</li></ul>

## PSIsafe Mobile 3.1 (Client)

The PSIsafe Mobile application offers customers a smartphone-based experience for filing, searching, and processing documents in PSIsafe Desktop while providing full traceability.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Hardware	<ul style="list-style-type: none"><li>• Smartphone on Apple iOS or Google Android</li></ul>
Accessibility	<ul style="list-style-type: none"><li>• High-speed Internet recommended</li></ul>
Mobile operating systems	<ul style="list-style-type: none"><li>• Apple iOS 9.3 and higher</li><li>• Google Android 5.0 and higher</li></ul>
Required Kofax software	<ul style="list-style-type: none"><li>• Kofax PSIsafe Desktop Server 12.2</li><li>• Kofax PSIsafe Desktop Open API and x64 Framework 12.2</li></ul>
Languages supported	<ul style="list-style-type: none"><li>• English (US)</li></ul>

## PSIsafe Desktop Server 12.2

The PSIsafe Desktop Server application serves as the foundational requirement for the PSIsafe Desktop product line. This core component provides licensing and serves all client connections. Additionally, the full text search (FTS) services can be deployed to enhance the functionality of the application. Where necessary, the PSIsafe Desktop Server and the FTS server may be installed separately.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>8 GB RAM</li> <li>1 GB free disk space</li> <li>Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance.</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating system	<ul style="list-style-type: none"> <li>Windows Server 2016 - 2022</li> </ul> <div style="background-color: #e6f2ff; padding: 5px; border: 1px solid #add8e6;">  PSIsafe Desktop should not be installed on a domain controller.         </div>
DBMS	<ul style="list-style-type: none"> <li>Microsoft SQL Server 2014 and higher</li> <li>Microsoft SQL Server 2014 Express and higher</li> <li>Microsoft Azure Managed SQL Instance</li> </ul>
Required third-party technologies (prerequisites)	<ul style="list-style-type: none"> <li>Microsoft .NET Framework 4.8 or higher</li> </ul>
Compatible Kofax software	<ul style="list-style-type: none"> <li>Client software, including:               <ul style="list-style-type: none"> <li>PSIsafe Desktop (thick) client 12.2</li> <li>PSIsafe Web (thin) client 12.2</li> <li>PSIsafe Mobile client 3.1</li> </ul> </li> <li>PSIsafe Desktop Server 12.2</li> <li>PSIsafe API 12.2 (Framework)</li> <li>PSIsafe Open API 12.2 (Framework)</li> <li>PSIsafe Books 12.2</li> <li>PSIsafe Synchronizer 12.2</li> <li>PSIsafe PDF Forms Monitor 12.2</li> <li>PSIsafe Share 2.0 (hosted by Kofax)</li> </ul> <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSIsafe API (Framework)

The PSIsafe API application bundle is the third-generation technology in the PSIsafe Desktop business layer, extending the PSIsafe Desktop server application and allowing client-facing applications to access the PSIsafe Desktop ecosystem. Where necessary, the PSIsafe API and PSIsafe Desktop server can be installed separately.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>8 GB RAM</li> <li>1 GB free disk space</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating systems	<ul style="list-style-type: none"> <li>Windows Server 2016 - 2022</li> </ul> <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p> PSIsafe Desktop should not be installed on a domain controller.</p> </div>
Web servers/web application servers	<ul style="list-style-type: none"> <li>Internet Information Services (IIS) 8.5 and higher</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>PSIsafe Desktop Server (Framework) - Microsoft .NET Framework 4.8 or higher</li> <li>PSIsafe API (Framework): ASP.NET Core Windows Hosting Bundle</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>Kofax PSIsafe Desktop Server 12.2</li> </ul>
Compatible Kofax software	<ul style="list-style-type: none"> <li>Client software, including: <ul style="list-style-type: none"> <li>PSIsafe Desktop (thick) 12.2</li> <li>PSIsafe Web (thin) 12.2</li> </ul> </li> <li>PSIcapture 7.8 and higher</li> </ul> <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSIsafe Open API and x64 Server (Framework) 12.2

The PSIsafe Open API and x64 Server application bundle is the second generation technology in the PSIsafe Desktop business layer, supporting key features within the PSIsafe Desktop product line, such as PSIsafe Mobile and the PSIsafe DocuSign integration. Where necessary, the PSIsafe Open API and x64 Server (Framework) may be installed separately.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>8 GB RAM</li> <li>1 GB free disk space</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating systems	<ul style="list-style-type: none"> <li>Windows Server 2016 - 2022</li> </ul> <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #ccc;"> <p> PSIsafe Desktop should not be installed on a domain controller.</p> </div>
Web servers/Web application servers	<ul style="list-style-type: none"> <li>Internet Information Services (IIS) 8.5 and higher</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>Microsoft .NET Framework 4.8 or higher</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>Kofax PSIsafe Desktop Server 12.2</li> </ul>
Compatible Kofax software	<ul style="list-style-type: none"> <li>Client software, including:                             <ul style="list-style-type: none"> <li>PSIsafe Desktop (thick) 12.2</li> <li>PSIsafe Mobile 3.1</li> </ul> </li> <li>PSIsafe Desktop Server 12.2</li> </ul> <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSIsafe Web Server 12.2

The PSIsafe Desktop Web Server application enables PSIsafe Desktop users to host their own web-based PSIsafe Desktop Web Client.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>16 GB RAM</li> <li>16 GB free disk space</li> <li>Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance.</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating systems	<ul style="list-style-type: none"> <li>Windows Server 2019 - 2022</li> </ul> <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #cfe2f3;"> <p> PSISafe Desktop should not be installed on a domain controller</p> </div>
Web servers/Web application servers	<ul style="list-style-type: none"> <li>Internet Information Services (IIS) 10 and higher</li> <li>Compatible with Microsoft Azure App Services. App Service Plan P1V2 or greater recommended. Sizing is workload-dependent.</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>Framework: ASP.NET Core Windows hosting bundle</li> </ul>
Compatible third-party technologies	<ul style="list-style-type: none"> <li>Microsoft Office or other Windows-based applications (for viewing/editing documents)</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>Kofax PSISafe Desktop Server 12.2</li> <li>PSISafe API (Framework) 12.2</li> </ul>
Compatible Kofax software	<ul style="list-style-type: none"> <li>Client software, including:                             <ul style="list-style-type: none"> <li>PSISafe Desktop (thick) 12.2</li> <li>PSISafe Web (thin) 12.2</li> </ul> </li> </ul> <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSISafe Books 12.2

The PSISafe Books application serves as a connection between QuickBooks and PSISafe Desktop. Documents such as invoices are imported into PSISafe Books. The user keys data from the invoice into PSISafe Books using the convenient side panel.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>• 8 GB RAM</li> <li>• 1 GB free disk space</li> <li>• Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>• High-speed Internet recommended</li> </ul>
Client operating systems	<ul style="list-style-type: none"> <li>• Microsoft Windows 11</li> <li>• Microsoft Windows 10</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>• Microsoft .NET Framework 4.8 or higher</li> <li>• Intuit QuickBooks® Enterprise 19 and higher</li> </ul>
Compatible third-party technologies	<ul style="list-style-type: none"> <li>• Microsoft Office or other Windows-based applications (for viewing/editing documents)</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>• Kofax PSIsafe Desktop and Server 12.2</li> </ul>
Languages supported	<ul style="list-style-type: none"> <li>• English (US)</li> </ul>

## PSIsafe Synchronizer 12.2

The PSIsafe Synchronizer application is designed to synchronize metadata in the form of indexes between a wide variety of third-party ODBC-compliant data sources and PSIsafe Desktop. Once configured, PSIsafe Synchronizer can synchronize automatically in the background and update folder index fields as often as external data is updated.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>8 GB RAM</li> <li>1 GB free disk space</li> <li>Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating systems	<ul style="list-style-type: none"> <li>Windows Server 2016 - 2022</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>Microsoft .NET Framework 4.8 or higher</li> <li>Customer ODBC or SQL Data Source</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>Kofax PSIsafe Desktop Server 12.2</li> </ul>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSIsafe PDF Forms Monitor 12.2

The PSIsafe PDF Forms Monitor application routinely watches a designated SQL database table and creates a new PDF form when new rows with the designated status are found. The PDF form is then merged into PSIsafe Desktop based on specific data in the row that is matched to folder indexes.

This application supports customer-hosted or cloud-hosted environments.

Specification	Description
Hardware	<ul style="list-style-type: none"> <li>8 GB RAM</li> <li>1 GB free disk space</li> <li>Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>High-speed Internet recommended</li> </ul>
Server operating system	<ul style="list-style-type: none"> <li>Windows Server 2016 - 2022</li> </ul>
Required third-party technologies	<ul style="list-style-type: none"> <li>Microsoft .NET Framework 4.8 or higher</li> <li>Customer SQL Data Source</li> <li>Ability to create PDF form templates</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>Kofax PSIsafe Desktop Server 12.2</li> </ul>
Languages supported	<ul style="list-style-type: none"> <li>English (US)</li> </ul>

## PSIsafe Share 2.0 (Client)

The PSIsafe Share application is a cloud-based software-as-a-service that enables PSIsafe Desktop users to post documents in a user's Share folder using the PSIsafe Desktop client application. These documents may be easily accessed through the web-based PSIsafe Share portal provided to the Share user through email.

Both customer-hosted and cloud-hosted customers can use this SaaS-based offering to facilitate sharing of content.

Specification	Description
Accessibility	<ul style="list-style-type: none"> <li>• High-speed Internet connection</li> </ul>
Browser	<ul style="list-style-type: none"> <li>• Google Chrome 100 and higher</li> <li>• Mozilla Firefox 100 and higher</li> <li>• Microsoft Edge 16 and higher</li> <li>• Apple Safari version 11 and higher</li> </ul>
Required Kofax software	<ul style="list-style-type: none"> <li>• Kofax PSIsafe Desktop Server 12.2</li> <li>• Kofax PSIsafe Desktop 12.2 (for sharing documents)</li> </ul>
Languages supported	<ul style="list-style-type: none"> <li>• English (US)</li> </ul>