

Tungsten PSIsafe Desktop Technical Specifications

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TUNGSTEN
AUTOMATION

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Chapter 1

Introduction

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

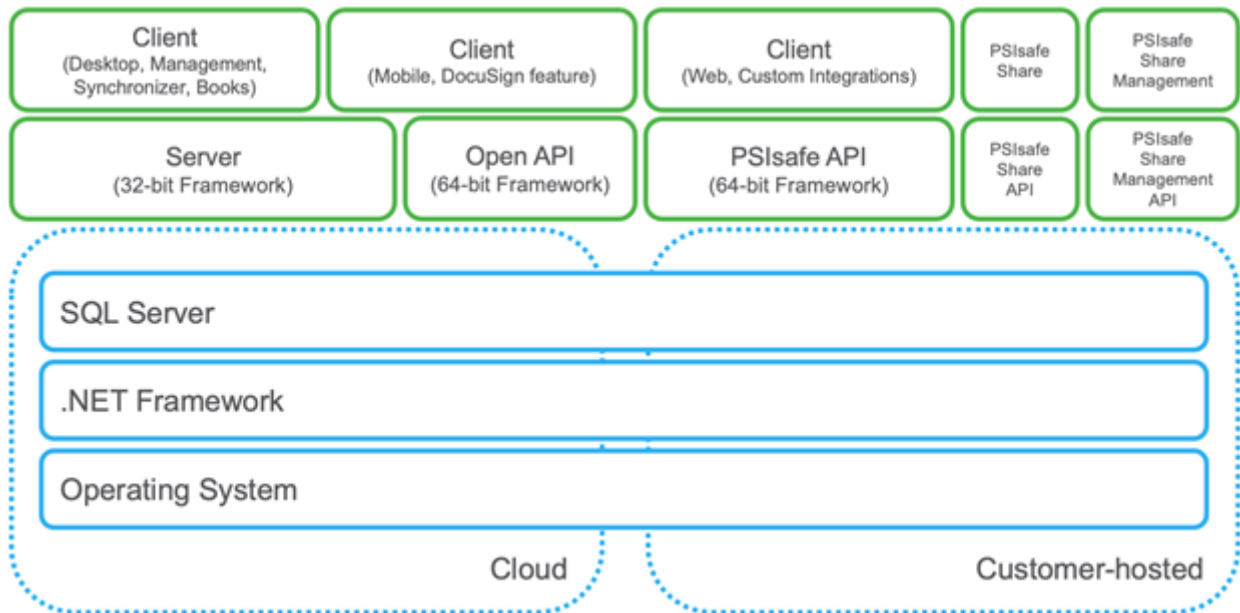
- Client software, including:
 - PSIsafe Desktop (thick) client
 - PSIsafe Web (thin) client
 - PSIsafe Mobile client
- PSIsafe Desktop Server
- PSIsafe API (Framework)
- PSIsafe Open API (Framework)
- PSIsafe Books
- PSIsafe Synchronizer
- PSIsafe PDF Forms Monitor
- PSIsafe Share (hosted by Tungsten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

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 Tungsten Automation 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 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 Open API and x64 Server

This application bundle is the second generation technology in the PSIsafe business layer, supporting key features within the PSIsafe product line, such as 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 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 Tungsten PSIsafe Open API.

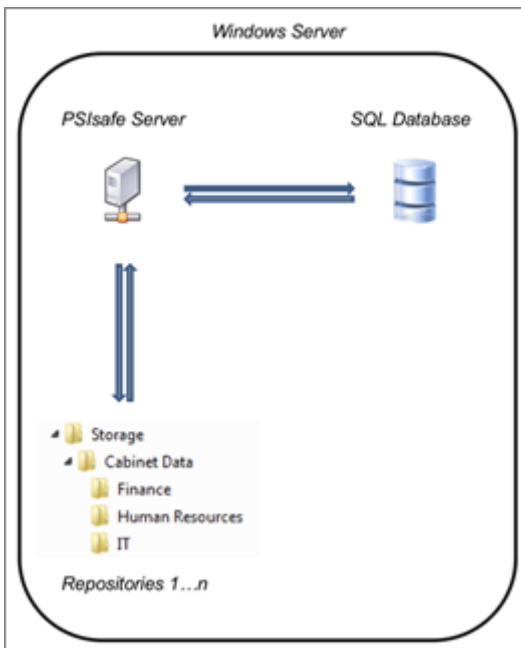
Both customer-hosted and cloud-hosted customers can use this SaaS-based offering to facilitate sharing of content. The Tungsten Automation Cloud Services team manages customer tenancy using the PSIsafe Share Management portal.

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

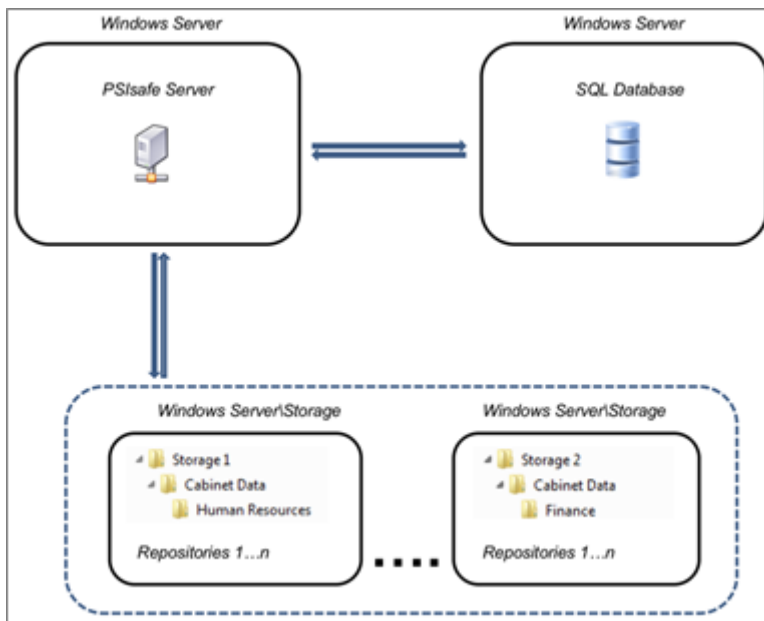


Relationship of PSIsafe Server, SQL database, and repository files

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 12.3.0

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 Tungsten 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">• 8 GB RAM• 1 GB free disk space• Minimum supported resolution is 1920 x 1080. In some cases, scaling may affect performance.
Accessibility	<ul style="list-style-type: none">• High-speed Internet recommended
Client operating systems	<ul style="list-style-type: none">• Microsoft Windows 11• Microsoft Windows 10
Required third-party technologies	<ul style="list-style-type: none">• Microsoft .NET Framework 4.8 or higher
Compatible third-party technologies	<ul style="list-style-type: none">• Microsoft Office or other Windows-based applications (for viewing/editing documents)
Required Tungsten Automation software	<ul style="list-style-type: none">• PSIsafe server 12.3.0
Compatible Tungsten Automation software	<ul style="list-style-type: none">• PSIsafe API, x64 server, and SignalR 12.3.0• PSIsafe Open API and x64 server 12.3.0• PSIsafe Books 12.3.0• PSIsafe Share 2.0 (hosted by Tungsten Automation) <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none">• English (US)

PSIsafe Web 12.3.0

PSIsafe Web offers a web-based experience for filing and searching documents based on the functionality of 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"> • Google Chrome 100 and higher • Mozilla Firefox 100 and higher • Microsoft Edge 16 and higher • Apple Safari 11 and higher
Accessibility	<ul style="list-style-type: none"> • High-speed Internet recommended
Compatible third-party technologies	<ul style="list-style-type: none"> • Microsoft Office or other Windows-based applications (for viewing/editing documents)
Required Tungsten Automation software	<ul style="list-style-type: none"> • PSIsafe server 12.3.0 • PSIsafe API, x64 server, and SignalR 12.3.0
Languages supported	<ul style="list-style-type: none"> • English (US)

PSIsafe Mobile 4.0

PSIsafe Mobile 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"> • Smartphone on Apple iOS or Google Android
Accessibility	<ul style="list-style-type: none"> • High-speed Internet recommended
Mobile operating systems	<ul style="list-style-type: none"> • Apple iOS 15 or later • Google Android 11 or later
Required Tungsten Automation software	<ul style="list-style-type: none"> • PSIsafe server 12.3.0 • PSIsafe API, x64 server, and SignalR 12.3.0
Languages supported	<ul style="list-style-type: none"> • English (US)

PSIsafe Server 12.3.0

The PSIsafe server application serves as the foundational requirement for the PSIsafe product line. This core component provides licensing and serves all client connections. Additionally, the full text search (FTS) services and Workflow services are deployed to enhance the functionality of the application.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> 8 GB RAM 1 GB free disk space Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance.
Accessibility	<ul style="list-style-type: none"> High-speed Internet recommended
Server operating system	<ul style="list-style-type: none"> Windows Server 2016 - 2022 <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #ccc;">  PSIsafe server should not be installed on a domain controller. </div>
DBMS	<ul style="list-style-type: none"> Microsoft SQL Server 2016 and higher Microsoft SQL Server 2016 Express and higher Microsoft Azure Managed SQL Instance
Required third-party technologies (prerequisites)	<ul style="list-style-type: none"> Microsoft .NET Framework 4.8 or higher
Compatible Tungsten Automation software	<ul style="list-style-type: none"> Client software, including: <ul style="list-style-type: none"> PSIsafe Desktop (thick) client 12.3.0 PSIsafe Web (thin) client 12.3.0 PSIsafe Mobile client 4.0 PSIsafe API 12.3.0 (Framework) PSIsafe Open API 12.3.0 (Framework) PSIsafe Books 12.3.0 PSIsafe Synchronizer 12.3.0 PSIsafe PDF Forms Monitor 12.3.0 PSIsafe Share 2.0 (hosted by Tungsten Automation) <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> English (US)

PSIsafe API, x64 server, and SingalR 12.3.0

PSIsafe API is the third-generation technology in the PSIsafe business layer, extending the PSIsafe server application and allowing client-facing applications to access the PSIsafe ecosystem. It includes an x64 server and licensing management application called SignalR. Where necessary, the PSIsafe API and PSIsafe server can be installed separately.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none"> 8 GB RAM 1 GB free disk space
Accessibility	<ul style="list-style-type: none"> High-speed Internet recommended
Server operating systems	<ul style="list-style-type: none"> Windows Server 2016 - 2022
Web servers/web application servers	<ul style="list-style-type: none"> Internet Information Services (IIS) 10 or later
Required third-party technologies	<ul style="list-style-type: none"> PSIsafe server: Microsoft .NET Framework 4.8 or higher PSIsafe API: ASP.NET Core Windows Hosting Bundle 8.0
Required Tungsten Automation software	<ul style="list-style-type: none"> PSIsafe server 12.3.0
Compatible Tungsten Automation software	<ul style="list-style-type: none"> Client software, including: <ul style="list-style-type: none"> PSIsafe Desktop 12.3.0 PSIsafe Web 12.3.0 PSIsafe Mobile 4.0 PSIcapture 7.9 and higher <p>All prior versions are considered unsupported.</p>
Languages supported	<ul style="list-style-type: none"> English (US)

PSIsafe Open API and x64 server 12.3.0

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 the PSIsafe DocuSign integration. Where necessary, the PSIsafe Open API and x64 Server may be installed separately.

This application is only required for customer-hosted deployments.

Specification	Description
Hardware	<ul style="list-style-type: none">• 8 GB RAM• 1 GB free disk space
Accessibility	<ul style="list-style-type: none">• High-speed Internet recommended
Server operating systems	<ul style="list-style-type: none">• Windows Server 2016 - 2022
Web servers/Web application servers	<ul style="list-style-type: none">• Internet Information Services (IIS) 10 or later
Required third-party technologies	<ul style="list-style-type: none">• Microsoft .NET Framework 4.8 or higher
Required Tungsten Automation software	<ul style="list-style-type: none">• PSIsafe server 12.3.0
Compatible Tungsten Automation software	<ul style="list-style-type: none">• Client software, including:<ul style="list-style-type: none">• PSIsafe Desktop (thick) 12.3.0• PSIsafe Desktop Server 12.3.0 All prior versions are considered unsupported.
Languages supported	<ul style="list-style-type: none">• English (US)

PSIsafe Books 12.3.0

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">• 8 GB RAM• 1 GB free disk space• Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance
Accessibility	<ul style="list-style-type: none">• High-speed Internet recommended
Client operating systems	<ul style="list-style-type: none">• Microsoft Windows 11• Microsoft Windows 10
Required third-party technologies	<ul style="list-style-type: none">• Microsoft .NET Framework 4.8 or higher• Intuit QuickBooks® Enterprise 19 and higher
Compatible third-party technologies	<ul style="list-style-type: none">• Microsoft Office or other Windows-based applications (for viewing/editing documents)
Required Tungsten Automation software	<ul style="list-style-type: none">• PSIsafe server 12.3.0
Languages supported	<ul style="list-style-type: none">• English (US)

PSIsafe Synchronizer 12.3.0

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"> 8 GB RAM 1 GB free disk space Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance
Accessibility	<ul style="list-style-type: none"> High-speed Internet recommended
Server operating systems	<ul style="list-style-type: none"> Windows Server 2016 - 2022
Required third-party technologies	<ul style="list-style-type: none"> Microsoft .NET Framework 4.8 or higher Customer ODBC or SQL Data Source
Required Tungsten Automation software	<ul style="list-style-type: none"> PSIsafe server 12.3.0
Languages supported	<ul style="list-style-type: none"> English (US)

PSIsafe PDF Forms Monitor 12.3.0

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"> 8 GB RAM 1 GB free disk space Minimum supported screen resolution is 1366 x 768. In some cases, scaling may affect performance
Accessibility	<ul style="list-style-type: none"> High-speed Internet recommended
Server operating system	<ul style="list-style-type: none"> Windows Server 2016 - 2022
Required third-party technologies	<ul style="list-style-type: none"> Microsoft .NET Framework 4.8 or higher Customer SQL Data Source Ability to create PDF form templates
Required Tungsten Automation software	<ul style="list-style-type: none"> PSIsafe server 12.3.0
Languages supported	<ul style="list-style-type: none"> English (US)

PSISafe Share 2.0

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">• High-speed Internet connection
Browser	<ul style="list-style-type: none">• Google Chrome 100 and higher• Mozilla Firefox 100 and higher• Microsoft Edge 16 and higher• Apple Safari version 11 and higher
Required Tungsten Automation software	<ul style="list-style-type: none">• PSISafe server 12.3.0• PSISafe Desktop 12.3.0 (for sharing documents)
Languages supported	<ul style="list-style-type: none">• English (US)