Pre-Installation Questionnaire

Reseller Information	
Reseller	
• Name	
• Phone	
• Email	
Technical Contact	
• Name	
• Phone	
• Email	

End User Information	
Organization Name	
• Address	
• Phone	
• Email	
Project Manager	
• Address	
• Phone	
• Email	
Technical Contact	
• Address	
• Phone	
• Email	

Question	Requirements	Notes
Who will complete the software installation and configuration?	☐ Customer ☐ Professional Services ☐ Reseller	Minimum installation time for Professional Services is 2 hours.

Assumptions:
- Server (physical or virtual) and external database (if needed) will be ready the day of installation.
- Person performing installation will have administrator rights to servers. If not, then server administrator needs to be available during installation of PaperCut.
- All devices are configured with static IP Addresses or MAC address reservations and networked to environment including print queue setup.
- All firewall exceptions needed for PaperCut communication between printers, print servers, multi-function devices, payment gateways, clients and email are configured.

Project Requirements

Question	Requirements	Notes
Organization Type	☐ Education ☐ Corporate ☐ Professional	
Reasons to Implement PaperCut Solution	☐ Print/Copy/Fax/Scan Tracking ☐ Secure Release ☐ Find Me Printing ☐ Integrated Scanning ☐ Client Billing ☐ Department Chargeback ☐ Mobile/ BYOD Printing ☐ Print Archiving	
Number of sites		
Number of users		
Number of printers		
Number of MFDs		
Number of print servers		
Server Environment	☐ On-Premise ☐ Cloud Hosted	**PaperCut Environment Deployment Types**
Server Operating System	☐ Microsoft Windows ☐ Apple Mac OS X ☐ Linux ☐ Novell OES Linux	**Server Sizing Guide** **System Requirements**
Client Operating System	☐ Microsoft Windows ☐ Apple Mac OS X ☐ Linux ☐ Novell OES Linux	
External Database (optional)	☐ Microsoft SQL ☐ Microsoft SQL Express ☐ PostgreSQL ☐ MySQL ☐ Oracle	**Deployment on an External Database (RDBMS)**
Multiverse		**What is Multiverse?**
Reporting	☐ Data Integrations ☐ Custom Reporting	**Data Integration Custom Reporting**

Question	Requirements	Notes
User Authentication Source	☐ Active Directory ☐ Google Cloud Directory ☐ Apple Open Directory ☐ LDAP ☐ Azure AD ☐ Novell eDirectory ☐ PaperCut Internal Users ☐ Other_____	User/Group Synchronization Google Cloud Directory Configure Azure AD
High Availability	☐ Fail-Over Feature ☐ Print Load Balancing ☐ Name of NLB Solution _____	Fail-Over Printer Load Balancing
Are VDI environments being used?	☐ Citrix ☐ VMWare ☐ Other _____	
Will you require cross-server printing?	☐ Yes ☐ No	
Device Authentication Methods	☐ Username and Password ☐ ID Number ☐ Card Authentication ☐ None	If Card Authentication is selected, you must fill out the next two sections

Card Authentication	☐ Proximity
	    o HID Prox
	    o HID iClass
	    o Mifare
	    o Other
	       _____
	☐ Magnetic Swipe
	    o Track #
	       _____
	☐ Bar Code
		Questions about Card Readers
		
		Please provide a sample card to properly configure card readers. Contact your Sales Representative for additional information.

Source of Card ID Number	☐ Self-Association ☐ Directory Services ☐ External Database ☐ Batch Import ☐ Auto-Generate	Active Directory/ LDAP External Lookup Batch Import and Update Automatic Card/ID Generation
Integration Module	☐ NONE ☐ Yes Name of Software _____	Billing Integration

Question	Requirements	Notes
Integrated Scanning	☐ Scan to email ☐ Scan to folder ☐ Scan to cloud	Configure Email

OCR	☐ OCR
	 ☐ On-Prem (Page amount)
	     o 0-50
	     o 50-199
	     o 200+
		Document Processing (OCR)

Mobile and BYOD Printing	☐ Mobility Print
	 ☐ Microsoft Universal Print
	 ☐ Email to Print
	 ☐ Web Print
	     o PDF & Images
	     o Office File Formats
		Mobility Print
		 Universal Print Connector
		 Email to Print
		 Web Print
		 Sandbox Mode

Print Deploy	☐ Windows ☐ macOS ☐ chrome OS ☐ Linux	What is Print Deploy? How it works?
Print Policies & Restriction	☐ Encourage grayscale printing ☐ Encourage duplexing ☐ Large Print Jobs Management ☐ Manage print jobs by user or group ☐ Charge print jobs to other users or shared accounts ☐ Other _____	Filters and Restrictions Advanced Scripting

Recharging User Accounts	☐ Payment Gateway
	     o What type?
	     _____
	 ☐ Pay Stations/ Kiosks
	 ☐ Quota Scheduling
	 ☐ Top Up Cards
	 ☐ Web Cashier (POS)
		Payment Gateway
		 Pay Stations/ Kiosks
		 Quota Scheduling
		 Top Up Cards
		 Web Cashier (POS)

Default Page Cost	☐ Copy _____ ☐ Print _____ ☐ Scan _____ ☐ Fax _____ ☐ Duplex Discount _____	

Multi-Function Devices & Printers to be integrated with PaperCut

Location	Bldg/Room	Dept/Area	Make/Model	IP Address	Print Queue Name	Print Server Name	Driver Type (PS/PCL)	MFD?
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If additional lines are needed, attach an Excel

OPTIONAL: Only fill out if information is available

PaperCut App Server Information	
Server Name	
Sever IP Address	
Operating System	
CPU Cores (vCPU)	
Memory	
Hard Drive Size	
SMTP Server IP Address	

External Database (Optional)	
Database Server Name	
Sever IP Address	
Operating System	
CPU Cores (vCPU)	
Memory	
Hard Drive Size	
Database Name	
Database Port Number	
SQL Login Username	
SQL Login Password	

Secondary Print Server Information (if applicable)

Server Name	IP Address	Operating System	Location