

Pre-Installation Questionnaire

Reseller Information	
Reseller	
● Name	
● Phone	
● Email	
Technical Contact	
● Name	
● Phone	
● Email	

End User Information	
Organization	
● Name	
● Address	
● City, State/Province	
Project Manager	
● Name	
● Address	
● City, State/Province	
Technical Contact	
● Name	
● Address	
● City, State/Province	
Projected Install Date	

Question	Requirements	Notes
Who will complete the 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	<ul style="list-style-type: none"> Education Corporate Professional (client billing) 	
Reasons to implement PaperCut solution	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> On-Premise Cloud Hosted 	PaperCut Environment Deployment Types
Server Operating System	<ul style="list-style-type: none"> Microsoft Windows Apple Mac OS X Linux Novell OES Linux 	PaperCut Sizing Guide PaperCut MF System Requirements
Client Operating Systems	<ul style="list-style-type: none"> Microsoft Windows Apple Mac OS X Linux UNIX Workstation Chrome OS 	PaperCut MF System Requirements
External Database (Optional)	<ul style="list-style-type: none"> Microsoft SQL Microsoft SQL Express PostgreSQL MySQL Oracle 	Deployment on an External Database (RDBMS)

Question	Requirements	Notes
User Authentication Source	Active Directory Apple OpenDirectory LDAP Novell eDirectory PaperCut Internal Users Other: _____	User/Group Synchronization
Device Authentication Methods	Username/Password ID Number Card Authentication None	If Card Authentication is selected, you must fill out the next two sections
Card Authentication	Proximity HID Prox HID iClass Mifare Other: _____ Magnetic Swipe 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 PaperCut External Lookup Batch Import and Update Automatic Card/ID Generation
Mobile and BYOD printing	Mobility Print Google Cloud Print iOS Printing Email to Print Web Print PDF/Images Office File Formats	Mobility Print Google Cloud Print iOS Printing Email to Print Web Print Sandbox Mode

Question	Requirements	Notes
Print Policies & Restrictions	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 Advance Scripting
Recharging User Accounts	Payment Gateways Paystations/Kiosks Quota Scheduling Top Up Cards Web Cashier (POS)	Payment Gateways Paystations/Kiosks Quota Scheduling Top Up Cards Web Cashier
Default Page Cost	Copy: _____ Print: _____ Scan: _____ Fax: _____ Duplex Discount: _____	
User Interface Customization	Yes No	User Interface Customization

Multi-Function Devices & Printers to be integrated with PaperCut

Location	Bldg/Room	Department/ Area	Make/Model	IP Address	Print Queue Name	Print Server Name	Driver Type (PS/PCL)	MFD?

If additional lines needed use Excel

