# Onboarding Checklist

Friday, September 20, 2024 9:30 AM

## Onboarding Checklist

### Client and Contact Information

| | |
|---|---|
| Customer Name | |
| Address | |
| Phone | |
| Email | |
| Website | |
| Infomax Project Manager | |
| Phone | |
| Email | |
| Customer Contact | |
| Role | |
| Address | |
| Phone | |
| Email | |
| Contact Preference | ☐ Email<br>☐ Phone<br>☐ Other:<br>If Other: |
| Projected Install Date | |

| | | Notes |
|---|---|---|
| Who Will Complete the Installation and Configuration | ☐ Customer<br>☐ Vendor Services<br>☐ Infomax | |

Assumptions:
Infomax Solutions Engineer will have local administrator rights to necessary servers. If not, then server administrator needs to be available during installation of software solution. Server(s) and external database (if needed) will be ready before the day of installation. All necessary port and/or firewall permissions will be configured. And all output devices will be configured with either static IP's or MAC registrations.

| NOTES: |
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### Solution Overview

| ? | Requirements | Notes |
|---|---|---|
| Organization Type | ☐ Education<br>☐ Corporate<br>☐ Professional | |
| Desired Outcome(s) of Software Solution | ☐ Print/Copy/Fax/Scan tracking<br>☐ Secure Release<br>☐ Find-Me Printing<br>☐ Integrated Scanning<br>☐ Client Billing<br>☐ Department Chargeback<br>☐ Mobile/BYOD Printing<br>☐ Print Driver Deploy<br>☐ Integration | |
| Number of Sites | | |
| Number of Users | | |
| User OS | ☐ Windows<br>☐ Mac<br>☐ Linux | |
| Number of SFP | | |
| Number or MFP | | |
| Number of Print Servers | | |
| Current Print Management Setup | ☐ UniFlow<br>☐ PaperCut<br>☐ PrinterLogic<br>☐ Other<br>☐ NONE | |

| | | |
|---|---|---|
| Type of Deployment | ☐ On-Premise<br>☐ Cloud-Based<br>☐ Hybrid<br>☐ Other/None | |

## Server Information

| ? | Requirements | Notes |
|---|---|---|
| Primary Print Server Details (for UniFlow, PaperCut) | ☐ IP Address:<br>☐ OS System/Version:<br>☐ Windows:<br>☐ Apple:<br>☐ Linux:<br>☐ Storage:<br>☐ Memory: | |
| Secondary/Backup Print Server (if applicable): | ☐ IP Address:<br>☐ OS Version:<br>☐ Storage:<br>☐ Memory: | |
| PrinterLogic Serverless Architecture: | ☐ Direct IP Printing:<br>☐ Virtual Environment:<br>☐ Other: | |
| Virtualization Setup (All Solutions): | ☐ VM Details:<br>☐ Hypervisor:<br>☐ Other: | |
| Backup Strategy: | ☐ Frequency:<br>☐ Method:<br>☐ Location: | |

## Authentication and Security Setup

| ? | Requirements | Notes |
|---|---|---|
| Authentication Method (All Solutions): | ☐ LDAP:<br>☐ Active Directory:<br>☐ Azure AD:<br>☐ Google Cloud Directory:<br>☐ Other: | |
| Authentication Protocols: | ☐ Single Sign-On (SSO), Two-Factor Authentication (2FA)<br>☐ Card-based Authentication (Sample Card Setup) | |
| PrinterLogic Secure Release: | | |
| Print job release at printer | ☐ Direct IP<br>☐ Zero Trust | |

## Network and Firewall Configuration

| ? | Requirements | Notes |
|---|---|---|
| Network Configuration: | ☐ IP Addressing<br>☐ Subnet<br>☐ VLAN<br>☐ DNS<br>☐ Gateway | |
| Firewall Rules (All Solutions): | All Solutions - TCP 443 | |
| UniFlow | ☐ TCP 631 (IPP): For printing using IPP, especially for Mac clients.<br>☐ TCP 19100: Encrypted print data stream for UniFlow SmartClient (Windows).<br>☐ TCP 515 (LPR): Legacy LPR printing fallback port for both Windows and Mac devices.<br>☐ TCP 443: Secure web traffic (HTTPS), typically used for the web interface and secure communications. | |
| PaperCut | ☐ TCP 9191: Primary port for PaperCut's web interface and management console.<br>☐ TCP 9192: Used for encrypted web communications (SSL).<br>☐ TCP 9100: Printer port for raw printing (commonly used for direct IP printing).<br>☐ TCP 80 and 443: General web traffic for cloud integrations and secure web-based administration | |
| PrinterLogic | ☐ TCP 9100: Primary port for direct IP printing from workstations to printers.<br>☐ TCP 515 (LPR): Legacy LPR printing port.<br>☐ TCP 443: Secure communication between the PrinterLogic client and the cloud.<br>☐ TCP 31988: Communication between the printer and the PrinterLogic service object (for secure release and other CPA operations).<br>☐ TCP 80, 445: Windows Printer Server communication for importing printers. | |
| Proxy Settings (if applicable): | ☐ Proxy IP<br>☐ Authentication Method | |

## Device Integration

| ? | Requirements | Notes |
|---|---|---|
| Printer Models Supported (All Solutions): | Printer 1 Name + IP Address:<br>Printer 2 Name + IP Address:<br>Printer 3 Name + IP Address:<br>Printer 4 Name + IP Address:<br>Printer 5 Name + IP Address:<br>Printer 6 Name + IP Address:<br>Printer 7 Name + IP Address:<br>Printer 8 Name + IP Address:<br>Printer 9 Name + IP Address:<br>Printer 10 Name + IP Address: | |
| MFP Configuration (UniFlow, PaperCut): | ☐ Scan to Email/Folder<br>☐ Secure Print:<br>☐ Cloud Services:<br>One Drive:<br>Google Drive:<br>Sharepoint:<br>Other: | |

## Print Policy Configuration

| ? | Requirements | Notes |
|---|---|---|
| Print Policies: | | |
| Default Print Settings: | ☐ Simplex:<br>☐ Duplex(Encourage/Rule):<br>☐ Only Grayscale(Encourage/Rule):<br>☐ Allow Color:<br>☐ Large Print Job Management | |
| Secure Print Release: | ☐ PIN:<br>☐ Card:<br>☐ Mobile App:<br>☐ QR Code:<br>☐ Other:<br>Source:<br>☐ Self-Association<br>☐ Directory<br>☐ External Database<br>☐ Bach Import<br>☐ Auto-Generate | |
| Print Quotas (PaperCut, UniFlow): | ☐ User-Based<br>☐ Department Based | |
| Recharging User Accounts | ☐ Payment Gateways<br>☐ Paystation/Kiosks<br>☐ Quota Scheduling<br>☐ Top Up Cards<br>☐ Web Cashier | |
| Default Page Cost | ☐ Copy<br>☐ Print<br>☐ Scan<br>☐ Fax<br>☐ Duplex Discount | |

## Mobile & BYOD Printing Setup

| ? | Requirements | Notes |
|---|---|---|
| Mobile Printing Methods (All Solutions): | ☐ Mobile App:<br>☐ BYOD Printing | |
| Cloud Integration (PaperCut, UniFlow): | ☐ Google Drive<br>☐ OneDrive<br>☐ SharePoint<br>☐ Dropbox | |

## Scanning and Document Workflow

| ? | Requirements | Notes |
|---|---|---|
| Scanning Workflow: | ☐ Scan to Email:<br>☐ Folder: | |

| | | |
|---|---|---|
| | ☐ Cloud Services:<br>☐ OneDrive<br>☐ Google Drive<br>☐ SharePoint<br>☐ Other<br>☐ OCR:<br>☐ Document Searchability: | |
| | | |
| | | |
| | | |

## Customization and Branding

| ? | Requirements | Notes |
|---|---|---|
| User Interface Customization (All Solutions): | ☐ Branding:<br>☐ Logo(Location):<br>☐ Colors: | |
| Role-Based Customization: | ☐ Admin:<br>☐ Power Users:<br>☐ Regular Users: | |

## Reporting and Cost Tracking

| ? | Requirements | Notes |
|---|---|---|
| Reporting Preferences: | ☐ Specific Reports to setup as templates | |
| Cost Recovery Setup: | ☐ Chargeback for Users/Departments<br>☐ Client Billing | |
| Report Delivery Options: | ☐ Email Reports | |

## User & Group Management

| ? | Requirements | Notes |
|---|---|---|
| User Synchronization: | ☐ LDAP<br>☐ AD<br>☐ Azure<br>☐ Other | |
| Bulk User Import | ☐ CSV<br>☐ API | |
| Group Assignments: | ☐ User Roles<br>☐ Departments<br>☐ Groups<br>☐ Cost Centers | |

## Support and Maintenance Plan

| ? | Requirements | Notes |
|---|---|---|
| Scheduled Maintenance: | ☐ Server:<br>☐ Printer:<br>☐ Driver Updates: | |
| Support Contact Information: | ☐ Client IT Support<br>☐ Escalation Procedures | |

## Backup and Restore Configuration

| ? | Requirements | Notes |
|---|---|---|
| Backup Schedule: | ☐ Backup Location:<br>☐ Local:<br>☐ Cloud:<br>☐ Frequency:<br>☐ Recovery Process: | |
| PrinterLogic Backup Configuration: | ☐ Direct IP setup<br>☐ Eliminating server-side failure risk | |

## Final Testing and Go-Live Preparation

| ? | Requirements | Notes |
|---|---|---|
| Pre-Go Live Testing: | | |
| Authentication Testing: | ☐ LDAP<br>☐ AD<br>☐ Card<br>☐ Other | |
| Print Release | ☐ | |
| Mobile Print Testing | ☐ | |
| PrinterLogic Testing (Direct IP, Mobile Printing) | ☐ | |
| User Training | | |
| Guides | ☐ | |
| Quick Reference Cards for UniFlow, PaperCut, PrinterLogic | ☐ | |
| Post-Go Live Support: | | |
| Monitoring | ☐ | |
| Support Escalation | ☐ | |

## Summary of Changes:

| ? | Description |
|---|---|
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