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  Phone  Other:  If Other: |
| Projected Install Date |  |

|  |  |  |
| --- | --- | --- |
|  |  | Notes |
| Who Will Complete the Installation and Configuration | Customer  Vendor Services  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.

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| --- |
| NOTES: |
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## Solution Overview

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

## Server Information

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

## Authentication and Security Setup

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

## Network and Firewall Configuration

|  |  |  |
| --- | --- | --- |
| ? | Requirements | Notes |
| Network Configuration: | IP Addressing  Subnet  VLAN  DNS  Gateway |  |
| Firewall Rules (All Solutions): | All Solutions - TCP 443 |  |
| UniFlow | TCP 631 (IPP): For printing using IPP, especially for Mac clients.  TCP 19100: Encrypted print data stream for UniFlow SmartClient (Windows).  TCP 515 (LPR): Legacy LPR printing fallback port for both Windows and Mac devices.  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.  TCP 9192: Used for encrypted web communications (SSL).  TCP 9100: Printer port for raw printing (commonly used for direct IP printing).  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.  TCP 515 (LPR): Legacy LPR printing port.  TCP 443: Secure communication between the PrinterLogic client and the cloud.  TCP 31988: Communication between the printer and the PrinterLogic service object (for secure release and other CPA operations).  TCP 80, 445: Windows Printer Server communication for importing printers​​​. |  |
| Proxy Settings (if applicable): | Proxy IP  Authentication Method |  |

## Device Integration

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

## Print Policy Configuration

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

## Mobile & BYOD Printing Setup

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

## Scanning and Document Workflow

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| --- | --- | --- |
| ? | Requirements | Notes |
| Scanning Workflow: | Scan to Email:  Folder:  Cloud Services:  OneDrive  Google Drive  SharePoint  Other  OCR:  Document Searchability: |  |
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## Customization and Branding

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

## Reporting and Cost Tracking

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

## User & Group Management

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

## Support and Maintenance Plan

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

## Backup and Restore Configuration

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

## Final Testing and Go-Live Preparation

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| --- | --- | --- |
| ? | Requirements | Notes |
| Pre-Go Live Testing: |  |  |
| Authentication Testing: | LDAP  AD  Card  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:

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