eReceipts: Pre-Install Survey

IMM
The eSignature Company

Contents

Instructions....3
Customer Information....3
Environment....4
Contact Information....5
Project Manager....5
IT/Systems Contact....5
Operations Contact....5
Outsource Network Resource....5
eReceipts Server....6
Workstation Information....7
Other Systems....7
Printer Information....8

Instructions

This document is used to gather information specific to completing your installation and going live. Please complete the questions and return to your project coordinator at projects@immonline.com

Customer Information

Financial Institution Name

Main Branch Address

Number of Branches

Number of Teller Workstations

Number of Drive-Thru Workstations

Number of Branch Locatoins Using eReceipts

CU Logo

Select One

TeR logo should be sent to us in a .jpg form 317w x 152h Resolution 203

Address Under the Logo on the Receipt

Member of the Shared Branching Network Note: Two logos require the wide format Star TSP-800 series thermal printers

☐ Yes ☐ No

Default Shared Branch Logo

Select One

Receipts Layout

Select One

Environment

Core Information

Core Processing System

☐ Virtual ☐ Physical ☐ Online ☐ In-house

Version

Are you live on the platform

If not live, what is your target live date

Are there any deadlines tied to this go live date?

Are you a Datacenter Client ☐ Yes ☐ No

Contact Information

Please ensure that we have a cell phone for the project lead (at minimum). It is very important that we be able to reach the project lead for setup questions. Delays in getting information can interfere with the implementation schedule.

Project Manager: This is the primary contact during the implementation phase. This person will coordinate communications and information between internal groups and the IMM Project Coordinator.

Name
Title
Phone Cell
Email

IT/Systems Contact: This is the primary contact for all questions and tasks related to data and/or IT.

Name
Title
Phone Cell
Email

Operations Contact: This is the primary contact regarding operational issues for both implementation and ongoing support.

Name
Title
Phone Cell
Email

Outsource Network Resource: This is the contact who is responsible for the installation and implementation of hardware and software for this project.

Name
Title
Phone Cell
Email

eReceipts Server

If the financial institution is being delivered the server as a virtual image (OVA file) through their project manager, there is no need to fill out the section enclosed in this area.

Note: The server may not be a domain controller. The installer will need to be logged on to the server as an Administrator. eSign only supports SQL Express installed locally.

OS Select One Service Pack

Note: Verify that there are enough client licenses on the server to cover increased connections.

Server Hardware Configuration

Number of CPUs CPU model CPU speed

GHz RAM

Application Drive Note: may NOT be the C: drive Free HD space

Other software is running on this server

Server Name

Note: Server names needs to be named according to your naming convention for Live servers.

Server has been configured and added to your domain: ☐ Yes ☐ No

If no, date server will be ready

How do branches connect to the server Select One

Other

Speed

Antivirus Software

Additional licenses: ☐ Test/Training Server ☐ Disaster Recovery server

Workstation Information

The installer will need to be logged on to the server as an Administrator.

Physical PC OS Select One

Hardware Configuration

Number of CPUs CPU model CPU speed

GHz RAM

Free HD space

Adobe Reader Version

Thin Client Information

Note: Software must be in the publishing company's current full support lifecycle.

☐ Citrix Server: Citrix XenApp Version

☐ RDP Server Operating System

☐ VMWare Horizon Server Version

Number of thin client servers ☐ Load Balanced (Review System Requirements)

Number of thin client workstations

Number of thick client workstations

Floating Tellers

Other Systems

Do you have an Imaging Systems? ☐ Yes ☐ No

If "Yes", what system?

Cash Dispensing Machines (CDMs)

Printer Information

Supported Printers

☐ TSP800 Raster Printer ☐ TSP700 Raster ☐ Epson TM-H6000II ☐ Ithaca iTherm 280

☐ Epson TM-T88IIIP ☐ Epson TM-90 ☐ StarMicronics FVP-10 ☐ Other

Printers may connect via an internal Ethernet port, external HP Jet Direct print server, USB or LPT.
Please note that printers attached directly to a PC may not be shared.

Number of printers will be attached via each method

Internal Ethernet port (recommended solution)

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Internal Ethernet port (recommended solution)

Directly attached to PC via USB

External HP Jet Direct

Directly attached to PC via LPT

Printer to be used

Printers purchased from IMM

Printers installed and configured