

## Overview

This checklist requests necessary information in order to prepare for the work to be performed by Upland AccuRoute during the upcoming onsite visit. It covers the responsibilities of the customer as well as the foundation to create the scope of work. If this is a multiple site project, please complete one checklist for each site. Note: Depending on the complexity of your installation, scheduling could range from two to four weeks after the checklist has been received and reviewed.

## Prerequisites

- **100% Availability**

Designated Project Leader/ Administrator to work with the AccuRoute installer for information clarification and hands-on instruction. It is imperative that this person is available at all times during the engagement.

- **Telco**

All lines that will connect to the fax server must be installed and tested.

- **Availability of all Delivered Components**

Any items that were delivered to you for this installation must be available. This includes, but is not limited to, software, hardware and licenses.

- **Network Privileges**

An account with Local Administrator and Domain User rights must be created. This user name and password must be supplied to the AccuRoute installer. Additional rights and permissions will be needed for integration to SQL, document management systems and other applications. These rights will be reviewed with the AccuRoute Installation & Integration Engineer during the pre-installation conference call.

Note : Internet connection will be required if using a cloud-based location for Folders.

- **Acknowledge Completed Deliverables**

Sign-off on project report once the installation deliverables have been met.

## Contact Information

Main Contact(s) for Installation Services:

Installation Site Address:

Phone Numbers:

Email Addresses:

Preferred Start Date:

Secondary Preferred Start Date:

All attempts will be made to accommodate your dates selection. If it is not possible, the Installation Coordinator will contact you with other options.

Please note that a pre-installation conference call will also need to be scheduled approximately one to two weeks prior to the installation date, so please ensure that time is made available for the call. The Installation Coordinator will work to set up a mutually acceptable date and time for the call.

## Server Install

Which of the following have you received?

Software

Software Licenses

Hardware

Upgrade or Install:

New Install

Upgrade from (current version):

## Server Install

This server or VM must be built ahead of the installation date. This includes installation of any required hardware, loading of the OS, joining of the machine to the domain, as well as creation of account to be used to install the application and to run the services. Please see Upland AccuRoute's System Requirements document or the Requirements section of the Server Installation Guide for more information.

### Note:

- This server or VM must be a dedicated server and should not be running any applications or services other than those required by the Upland software.
- The required Operating System is either Windows 2012 R2, 2016, or 2019 (64 Bit).
- The Windows server that the AccuRoute Server is installed on must be a member of a Windows Domain.

## Server Information

What is or will be the name of the AccuRoute Server?

What is the Domain name where the server will be located?

Processor Type/Speed:

How many processors or cores? (AccuRoute requires at least 2, more processors/cores may be required based on environment)

RAM:

Free Disk Space:

What OS will the AccuRoute Server be running on?

## Network Environment

Current user Authentication mechanisms in place in network:

Microsoft Active Directory

Other. Please Specify:

Machine name of Active Directory Server:

If connecting AccuRoute to an ECM/DMS system, what is the system and version?

Does the server have internet connectivity? (Required for cloud storage)

Yes

No

Microsoft Office Version and Service Pack:

## Administrator Account Information

Please provide the person's name that will be providing the Administrator Account Username and Password information to the Installation Engineer, along with any relevant contact information. This person must be available to the AccuRoute Installation Engineer at the time of the scheduled installation.

If you have applied any type of security configurations, registry alterations or locked down any portion of the default install of the Operating System, please supply the details so that we can determine if these changes will affect the installation.

List any security policies (global or local) that are applied to any machines AccuRoute will be installing our applications on. These settings can affect our ability to install our software correctly or delay the completion of the installation.

## Database Configuration

AccuRoute requires Microsoft SQL Standard or Express. Microsoft SQL Express can be installed on the AccuRoute server or the AccuRoute server can be pointed at an existing SQL Server. If the AccuRoute server is pointed at a remote SQL Server, it must be a highly available configuration as this is a requirement for the system.

SQL Express is available for download on Microsoft's Website

Machine name of SQL server:

## Multifunction Devices

Are the organization's multifunction devices scan enabled?

Yes

No

Does the organization use any of the following cost recovery terminals?

nQueue Billback

Copitrak

Equitrac

## Desktop Operating Systems

Please check all operating systems that will interact with the AccuRoute server and indicate the version and service pack:

Windows 7

Windows 8

Windows 10

## AccuRoute CloudFax

If purchasing AccuRoute CloudFax and you are porting lines or requesting a bulk upload of users, the following documents will be need to be completed based on your configuration. Expectation for DID porting time will be communicated with the customer based on the AccuRoute environment by the Services Project Manager.

[AccuRoute CloudFax User List](#)

[Porting Document for Local Numbers](#)

[Porting Document for Toll-Free Numbers](#)