Intuitive for PaperCut MF - Customer Checklist Template

Please note, the questions below are recommended when configuring the initial installation. Please add questions where appropriate. If you have any questions, contact support at softwaresupport@acd-inc.com

Proposal (Pre-Sales)			
Question	**Response / Checklist**		
Is your PaperCut MF system on version 20.1.0 or higher? This can be found at the bottom when logging into their PaperCut MF interface.	Yes ☐	No ☐	
Is the Intuitive Dashboard application going to be co-hosted with PaperCut MF (Side-by-side) or installed on its own server (Standalone)?	Standalone ☐	Side-by-side ☐	
Check that the proposed server meets the minimum requirements. Specifications and sizing guides can be found by clicking this link.	Yes ☐	No ☐	
Are you accurately showing Departmental data for each of the print users in PaperCut MF?	Yes ☐	No ☐	
A standard Intuitive license is for 25 users minimum, including 2 administrators (as part of the 25). Do users want standard or customised logins?	Standard ☐	Customised ☐	
Do you want Active Directory to be integrated with Intuitive? (Integration for users only and NOT active directory groups)	Yes ☐	No ☐	
Please provide a customer URL to the dashboards. You need only change the section to the right in **BOLD.**	https://**intuitive.CompanyName.com**		
Please specify the port that the dashboards will run on. An example is provided to the right in **BOLD.**	Port: **443**		
Do you want to display a company logo on the webpage and/or change the banner colour? If so tick YES and provide a banner color as a RGB value, and attach a logo (PNG format) to your next item of correspondence.	Yes ☐	No ☐	RGB: FFFFFF
By default, the dashboards summarise data by Department. Would you like this to be changed to summarise by a different attribute? If default settings are to be used, tick **NO.**	If yes, please specify attribute in this field: **HERE**		No ☐
Do you require any other dashboard customisation? If so, tick **YES** ensure you attach any other details to your next item of correspondence.	Yes ☐	No ☐	
Do you require customer training? Please tick one or more of the options if they are required. Leave blank if **NO** training is required. Details of the training is listed in the table below:	User ☐	User Admin ☐	Designer ☐
User Training:	• Use of menus • Opening and closing dashboards • Navigating through each of the dashboards • Use of master functionality • Applying filters • Exporting data		

	• Logging out Allow 1 hour per course.
User Admin Training:	• Setting up users • Setting up groups • Setting up security filters • Resetting passwords • Logging of support calls Allow 2.5 hours per course
System Designer Training:	• Creating components • Creating new dashboards • Editing a dataset Allow 1 day plus 0.5 days mentoring follow up

Quotation

Professional Services

Item	Partner Estimate	Intuitive Estimate	Responsibility (Partner / Intuitive)
Install Intuitive for PaperCut MF Software Allow 2 hours (Implementation – Task 4)	2		Partner
Import Intuitive DX Dashboard and assets Allow 0.5 hours (Implementation – Task 5)	0.5		Partner
Application of Intuitive license Allow 0.25 hours (Implementation – Task 9)	0.25		Partner
Creation of URL to Intuitive Dashboards Allow 0.25 hours (Implementation - Task 10)	0.25		Partner
Apply customer branding Allow 0.5 hours (Implementation – Task 11)	0.5		Partner
Testing of data flow Allow 0.5 hours (Implementation – Task 14)	0.5		Partner
Data quality testing Allow 0.5 hours (Implementation – Task 15)	0.5		Partner
Creation of Partner and Intuitive Support account(s) Allow 0.25 hours (Implementation – Task 16)	0.25		Partner

Item	Estimate	Estimate	Responsibility
Secure delivery and storage of Partner access details / access methods Allow 0.25 hours (Implementation – Task 17)	0.25		Partner
Secure delivery of Intuitive access details / access methods Allow 0.25 hours (Implementation – Task 18)	0.25		Partner
End-User Account Setup Allow 1 hour per 10 users (standard) Allow 2 hours per 10 users (with customised logins) (Implementation – Task 19)	TBD (pending scope)		Partner
Testing of User Security filters, if required Allow 0.25 hours per unique security type (Implementation – Task 20)	TBD (pending scope)		Partner
Dashboard Customisation Refer to Intuitive Professional Services (Implementation – Task 21)		TBD (pending scope)	Intuitive
Secure delivery of customer access details / access methods Allow 0.5 hours (Implementation – Task 22)	0.5		Partner
Removal of Partner access, if required Allow 0.25 hours (Implementation – Task 23)	0.25		Partner / Customer
User Training Allow 2 hour per course (Max 5 attendees) (Implementation – Task 24)		2	Intuitive
User Admin Training Allow 3.5 hours (Max 5 attendees) (Implementation – Task 25)		TBD (pending scope)	Intuitive
System Designer Training Allow 1 day, and half a day of mentoring (Max 5 attendees) (Implementation – Task 26)		TBD (pending scope)	Intuitive
Handover of dashboard access to Partner Support team Allow 0.5 hours (Implementation – Task 25)	0.5		Partner
	Partner Total: **6.75** hour(s)	Intuitive Total: **X** hour(s)	

License Requirements	
Item	**Estimate**

Number of devices:	
Months of contract:	
Number of users (25 viewer users inc. 2 administrators):	
Additional license modules required: • Additional connectors • Additional user roles	
Intuitive server MAC address:	

Pre-Implementation

Question	Response / Checklist		
Can a user in the administrator group, read and write to the data-integrations folder for PaperCut MF?	Yes ☐	No ☐	
Is the user that will be used to install Intuitive a member of the Administrators group?	Yes ☐	No ☐	
Is it permitted for services to run without a user logged in?	Yes ☐	No ☐	
Is IIS and IIS Manager enabled on the Intuitive server?	Yes ☐	No ☐	
Administrator access to PaperCut available on the day of installation?	Yes ☐	No ☐	

Implementation

Question	Response / Checklist		
Please enter to the right the engineer assigned to the Intuitive implementation:	**Employee Name Here**		
Does Intuitive need to be installed on any other drive than C:?	Yes ☐	No ☐	Drive letter:
Would you like to use SQLite (recommended) or SQL Server to store the Intuitive configuration data? (Note PaperCut print data is always stored in SQLite)	SQLite ☐	SQL Server ☐	
If using SQL server, have you already set up the SQL instance?	Yes ☐	No ☐	N/A ☐
If using SQL server, is your instance on SQL Server 2008 R2 SP2 or above?	Yes ☐	No ☐	N/A ☐

If using SQL server, does the installation user / SQL Server user have the System Admin role on the SQL instance?	Yes ☐	No ☐	N/A ☐
If using SQL server, can the installation user / SQL Server user authenticate against the SQL instance?	Yes ☐	No ☐	N/A ☐
The default name of the Intuitive database is called "dashboard". Do you want this to be renamed? If so, please supply a name	Yes ☐	No ☐	New name:
Is your PaperCut instance located in an alternate location to the below? If so, please specify the path: C:\Program Files\PaperCut MF	Yes ☐	No ☐	Path:

Please nominate below the users you wish to have access to Intuitive dashboards. In "Sec. Filter" please add the identifier you wish to pre-filter data on (if applicable), i.e. a department of "Facilities". An example is provided below.

Username	First + Last Name	Security Filter	Email Address
Username1	**John Smith**	**Sales**	**john@123.com**
Username2			
Username3			
Username4			
Username5			
Username6			
Username7			
Username8			
Username9			
Username10			
Username11			
Username12			
Username13			
Username14			
Username15			
Username16			
Username17			
Username18			
Username19			

Username20			
Username21			
Username22			
Username23			
Username24			
Username25			

Customer Success			
Question	**Response / Checklist**		
Please enter the available amount of data. e.g. 15 months. Intuitive workshops cannot be performed with less than 3 months of data.	Available data: **X months**		
For the Intuitive health check, do you have an account that you can use to sign in? If so, please enter the username in the applicable field.	Yes ☐	No ☐	Username: **UsernameHere**
Please contact your account manager and nominate a date for the workshop in the field to the right.	Date(s) & Time(s) available:	**Date(s) Here**	
Would you like a follow-up workshop? You may enter available dates in the field to the right.	Yes ☐	No ☐	**DatesHere**