

EDM & OCR for Exchequer R1.5

Pre-installation Checklist / Technical Information Request

Updated - 27 March 2017

1. Technical Information

The following information must be provided by the client. This must be accurate to ensure that the installation can be successfully carried out.

For reference purposes, also consult the Server Platform Requirements and Sales Pre-Requisites documentation.

* 1. Exchequer Application Server (where the V1 components must be installed)

|  |  |  |
| --- | --- | --- |
| **Item** | **Please Complete** | **Notes** |
| Server Name/IP address |  |  |
| Virtual / Physical Server |  | e.g. Virtual |
| Server Specification |  | e.g. 32 GB RAMQuad Core 2.6Ghz Processor100GB Hard drive |
| Operating System |  | e.g. Windows 2012 R2  |
| SQL Tools installed on the Exchequer database server | i.e. SQL Management Studio |  |
| Exchequer Version | i.e. 2016 R2 |  |
| Exchequer Toolkit Version | i.e. 11.0.0.9 |  |
| MANAGER u/p |  |  |
| Test Exchequer Company(ies) to be used |  | ZZZZ01, TEST etc .. |
| Barcode Printer Share location | i.e. [\\PRINTERSERVER](file:///%5C%5CPRINTERSERVER)\Zebra |  |
| Exchequer Installation path | i.e. X:\Exchqr |  |
| Mail Server Name |  | e.g. Mail.outlook365.com |
| Mail Server Authentication |  |  |
| Mail boxes(s) to polled for PDF attachments(OCR only) |  |  |
| Mail boxe(s) user / pass(OCR only) |  |  |
| Remote Server Access method |  | e.g. VPN / WebEx – details to be provided |

* 1. PCs

|  |  |  |
| --- | --- | --- |
| **Item** | **Please complete** | **Note** |
| Client PCs operating system |  | e.g. Windows 8 |
| Admin username / password |  | Most local users should have local admin rights or will have it provided |
| Number of clients to be used |  | Based on licensed clients |
| Microsoft .NET Framework 3.5 installed |  | Yes / No |
| DbScanner Scan station Operating System |  | e.g. Windows 8 |
| All scanner hardware available. Firewire connection for certain scanners |  | Yes / No |
| Admin username / password |  | To be confirmed during install |
| Scanstation on same network as servers |  | Yes / No |
| Scanstation has internet access (for license registration) |  | Yes / No |
| Remote PC Access method |  | VPN / WebEx – details  |

*All users will be on the same network as the Exchequer Server to access clients.*

*Active Directory cannot be used as standard, though is possible as part of an enhancement request.*

* 1. Scanners

|  |  |  |
| --- | --- | --- |
| **Item** | **Please complete** | **Note** |
| Scanner Make / Model and number req. |  | e.g. 3 Kodak i1405’s |
| Scanner is on site (delivered) |  | Yes / No |
| Connectivity to scanstation |  | Normally Usb |
| Barcode recognition / Kofax VRS (per scanner) has been received |  | If procured by V1 then VRS is standard |

* 1. Server / Client Communication Details

The following table is for reference and information with regards to the individual modules and setting required for those modules.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Item** | **Port** | **Protocol** | **Bi-direction** | **Source** | **Destination** |
| DbCSArchive server | 31417 | TCP | Yes | V1 Server | Client PCs |
| DbCSArchive server | 31418 | TCP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbWebQuery | 31491 | HTTP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbCapture | 31450 | TCP | Yes | V1 Server | Client PCs |
| DbCapture | 31451 | TCP | Yes | V1 Server | Client PCs |
| DbCapture | 31452 | TCP | Yes | V1 Server | Client PCs |
|  |  |  |  |  |  |
| DbMail | 25\* | SMTP | Yes | V1 Server | Mailserver |
|  |  |  |  |  |  |
| Scan Station | 31417 | TCP | Yes | Client PC | V1 Server |
| Scan Station | 31418 | TCP | Yes | Client PC | V1 Server |
| Scan Station | 32000 | TCP | Yes | Client PC | V1 Server |
|  |  |  |  |  |  |
| DbLogin | 32000 | TCP | Yes | Client PC | V1 Server |

\*This is dependent on the type of mail connectivity