

# Pre-Installation Survey

IMM eReceipts

### FI Contact Information

<i>Project Lead Name:</i> Click here to enter text
<i>Role:</i> Click here to enter text
<i>Email:</i> Click here to enter text
<i>Phone:</i> Click here to enter text
<i>Technical Lead Name:</i> Click here to enter text
<i>Role:</i> Click here to enter text
<i>Email:</i> Click here to enter text
<i>Phone:</i> Click here to enter text

### 3<sup>rd</sup> Party IT Information

<i>3rd Party IT Vendor:</i> Click here to enter text
<i>IT Resource Name:</i> Click here to enter text
<i>Role:</i> Click here to enter text
<i>Email:</i> Click here to enter text
<i>Phone:</i> Click here to enter text

**Note:** If a third-party resource will be involved with the eReceipts Implementation Project, IMM requires a Non-Disclosure Agreement to be signed by all parties.

### Financial Institution Information

<b>FI Name:</b> Click here to enter text
<b>FI Address:</b> Click here to enter text
<b>Hours of Operations:</b> Click here to enter text
<b>Number of Branches/Workstations:</b> Click here to enter text
<b>Time Zone:</b> <input type="checkbox"/> Eastern <input type="checkbox"/> Central <input type="checkbox"/> Mountain <input type="checkbox"/> Pacific

### Business System(s) Information

<b>Host System/Version:</b> Click here to enter text
<b>Teller Platform/Version:</b> Click here to enter text
<b>Host Integration:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Host In-House or Hosted:</b> Click here to enter text
<b>Host Test Environment:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Imaging System:</b> Click here to enter text

### Server/Workstation Environment

<b>Are you a Datacenter?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Anti-Virus Software:</b> Click here to enter text
<b>Server Environment:</b> <input type="checkbox"/> VMWare <input type="checkbox"/> Hyper-V
<b>VMWare Version:</b> Click here to enter text
<b>Client Environment:</b> <input type="checkbox"/> Thick <input type="checkbox"/> Thin <input type="checkbox"/> Virtual
<b>WS Operating System:</b> <input type="checkbox"/> Windows 10
<b>UAC (User Access Control) Active:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>BITS (Background Intelligent Transfer) Regulated:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>BITS Bandwidth Transfer Speed:</b> Click here to enter text

### Hardware Devices (Make/Model)

<b>Signature Pads:</b> Click here to enter text
<b>Receipt Printer:</b> Click here to enter text
<b>Scanners:</b> Click here to enter text
<b>Tablets/iPads:</b> Click here to enter text

**Display Device:** Click here to enter text

**Other:** Click here to enter text

#### *eReceipts Information - New Install*

**SQL Database Version:**  Express  Full

**SQL Mirrored:**  Yes  No

#### *eReceipts Information - Upgrade*

**Production eReceipts Server # of CPU's:** Click here to enter text

**Production eReceipts Server Memory:** Click here to enter text

#### *eReceipts Services*

**Email Receipts:**  Yes  No

**Text Receipts (Requires Signed Proposal):**  Yes  No

**Hold Notices:**  Yes  No

**Shared Branching:**  Yes  No

**Co-Op Logo:**  Yes  No

**FI Logo Printed on Receipt:**  Yes  No

**Deposit/Withdrawal Slips Scanned:**  Yes  No

#### *Implementation Plan:*

**Preferred Deployment Method for Client Components:**  Silent Install via MSI  Manual via Machine

**Implementation Plan:**  One Branch  All Branches

#### *Additional Comments/Requirements*

*Please list if any additional comments or requirements:*

Click here to enter text