



Overview

This checklist requests necessary information in order to prepare for HP Capture and Route installation. 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 Capture and Route 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 Capture and Route 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 Capture and Route installation and 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.



Server/VM requirements and recommendations

HP Capture and Route server requirements may vary significantly based on your system configuration, the features you install, and volume of document processing (e.g., OCR). Recommendations may also differ based on your organisation's specific needs and volumes.

Minimum recommended configuration*

Component	Recommended
Processor	Quad-core processor, 2.6GHz + Multi-processors or multi-core processor(s)
Memory (RAM)	16GB +
Available hard-disk space **	200GB + (100GB, minimum)
Operating system	Microsoft Windows 2012 or 2016, 64-bit
Required applications	Internet Information Server (IIS) with SMTP and Worldwide Web services enabled. The IIS configuration requires ALL of the components except FTP. Windows Internet Explorer 7 or later.
SQL	SQL Express will be installed during the HP Capture and Route installation unless SQL Server is already installed on the server or a "highly available" SQL instance is available to connect to.

* Recommended configuration subject to change based on customer environment.

** Available hard-disk space after installation of operating system and required applications.

*** If installed on a virtual machine, the above resources must be dedicated.

Requirements

- The service account that the HP Capture and Route server will run with must be a local admin and domain user; it is not sufficient for the account to be just a local user on the server.
- The HP Capture and Route server must be a member of the Microsoft Windows Domain. It is not sufficient to be a stand-alone server in a workgroup.
- HP Capture and Route should be installed on a dedicated server/VM.
- For hardware-based (non-Fax-Over-IP) faxing capabilities, the system must have a full-length or half-length PCI-x or PCI-e card slot available (depending on your purchased board) to accommodate a supported Dialogic Brooktrout Fax Board in order to connect to the telephone network. Please note, the PCI slot type and Dialogic Brooktrout Fax Board type must match (e.g., if the slot type is PCI-e, the board must be PCI-e). If you have questions about what you purchased, please contact your Regional Sales Manager.
- Adobe Acrobat Reader should be installed on the HP Capture and Route server in order to view provided system documentation.
- If ObjectArchive is being used, it should be installed on a dedicated server in addition to the HP Capture and Route server.



Additional recommendations

- The server size is based on your document processing volume. Each conversion (or composer) thread requires its own CPU/core and memory (use recommended 4GB RAM per thread).
- The primary server requires one CPU/core to be reserved for the operating system, system manager, and connectors. A remote composer can utilise all of the CPU/cores.

Ports

The following ports are used by HP Capture and Route and must be open.

Protocols and ports used by HP CR	Direction	Protocol	Ports
Communication between HP CR server and active directory	out	LDAP TCP	389
Communication from HP CR server to email server	out	SMTP TCP	typically: 25
Send print jobs from HP CR server to network printers	out	LPR TCP	9100
Communication between HP CR web server (IIS) and network printers	bidirectional	HTTP TCP	80
Communication between HP CR web server (IIS) and network printers	bidirectional	HTTPS TCP	433
Communication between HP CR web server (IIS) and network printers	out	SNMP v2 UDP	161, 162
Communication between HP CR web server (IIS) and network printers	bidirectional	OXF	7627
Communication between HP CR admin client and HPCR server	in	DCOM TCP+UDP	135 49152 - 65535
Communication between HP CR servers	bidirectional	DCOM TCP+UDP	135 49152 - 65535
Communication between IIS and HP CR servers	bidirectional	DCOM TCP+UDP	135 49152 - 65535
Communication between HP CR server and SQL	bidirectional	TCP+UDP	1433



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 date selections. 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, and joining of the machine to the domain, as well as creation of accounts to be used to install the application and to run the services. Please see HP Capture and Route'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 HP software.
- The required operating system is either Windows 2012 64bit or Windows 2016 64bit.
- The Windows server on which the Capture and Route Server is installed must be a member of a Windows Domain.



Server information

What is or will be the name of the Capture and Route server?

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

Processor type/speed:

How many processors or cores? (Capture and Route requires at least two; more processors/cores may be required based on environment.)

RAM:

Free disk space:

Network environment

Current user authentication mechanisms in place in network:

Microsoft Active Directory

Other. Please specify:

Machine name of active directory server:



If connecting Capture and Route 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 name of the person who 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 for the Capture and Route installation engineer at the time of the scheduled installation.

If you have applied any type of security configurations or 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 on which Capture and Route will be installing our applications. These settings can affect our ability to install our software correctly or delay the completion of the installation.



Database configuration

Capture and Route requires Microsoft SQL Standard or Express. Microsoft SQL Express can be installed on the Capture and Route server, or the Capture and Route server can be pointed at an existing SQL server. If the Capture and Route 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 organisation's multifunction devices scan-enabled?

- Yes
 No

Does the organisation 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 Capture and Route server and indicate the version and service pack:

- Windows 7
 Windows 8
 Windows 10

Special requests

Please list any specific requirements for this system.