



Pre-installation Survey for Business Partners

It is important for you to complete all prerequisites and return the completed pre-installation survey form to your Business Development Manager (Sales representative) before the Millennium 3 install is scheduled or your Millennium 3 training occurs.

1. What is the name of your organization?

2. Who is your Business Development Manager (Sales representative)?

3. How many people will use Millennium 3? _____

4. Please list each end-user's name and the version of the Windows operating system (OS) on their computer.

End-user's Name	End-user's Windows OS
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

5. What type of setup will you be using? Local installation ___ Hosted Millennium ___
If you checked *Hosted Millennium*, skip to [Step 12](#) (printers).

6. If the company has (or expects to have) multiple Millennium 3 end-users, a shared file folder must be created for the Millennium 3 system directories. This is often done on a file server. The Millennium 3 end-users will need full share and folder access to this area.

What is the UNC path (for example, \\machine-name\shared-folder-name) to the shared file area?

7. What is the name of your SQL Server? _____
8. Are all the computers (database server, file server, end-user computers) at the same location, and on the same local area network? Yes ___ No ___
9. If any end-users are in a different office on a different network, does the company have a remote access solution in place for the remote users? Yes ___ No ___
10. Does each Millennium 3 end-user have a local administrator level logon account to his or her own computer? Yes ___ No ___
11. Millennium 3 keeps your data synchronized by transmitting changed data, encrypted, over the Internet. This data is sent from the end-user's workstation to MPAY Services using TCP/UDP port 8010.

Is this currently allowed on the company's firewall? Yes ___ No ___

If not, how long will it take to get an additional filter rule put in place to allow for this requirement?

12. What printers do you intend to use for printing?

Direct printing requires a PCL 4, 5, 5e, or 6 print driver. Please list the make and model of each printer, and if they are shared, network printers, or local printers. For each local printer, please list who uses the printer.

Printer Make	Model	Local or Network?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____