
IQ3 BOSS INSTALLATION PLANNING GUIDE

MMS VERSION 12.0.1
REVISION 11.2022

Site Name

Presented By: _____

Date: _____

- IMPORTANT NOTE -

PLEASE READ BEFORE PROCEEDING!

This guide contains information vital for your Revcord IQ3 installation. The data that you provide our installation team will assist in configuring your system prior and during the installation. Your Revcord Sales Engineer will work with you to thoroughly complete this form.

You must review these worksheets with your Sales Engineer before scheduling a specific start date. All information and "prep work" must be completed before the dates specified for the Installation. In addition, delays in getting these worksheets to the installation team will result in a delay of your start date.

If you have questions about any of the following worksheets, please contact your Sales Representative or engineer, and they can assist you!

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CLIENT CONTACTS

Site Name _____ City, State, Zip _____
Address _____

Primary Contact _____ Secondary Contact _____
Contact Number _____ Contact Number _____
Contact Email _____ Contact Email _____

Local IT Contact _____
Contact Number _____
Contact Email _____

Accounting Phone _____ Phone _____
Contact Name _____ Contact Name _____
Contact Number _____ Contact Number _____
Contact Email _____ Contact Email _____

SITE & NETWORK INFORMATION

The questions in this section will establish basic information about your installation environment. For networking questions, we recommend you first refer to your local IT or systems administrator.

1. Will the IT or systems administrator be available the day of the installation? Yes
 No

Name: _____ Phone: _____

Email: _____

2. IQ3 Comes with a data management system. What data services will you require?
- A. Cloud-Based Dedicated Instance in Revcord Cloud
 - B. Cloud-Based Instance in Revcord Multi-tenant Cloud
 - C. Local Customer-Based Instance

3. Please Indicate your Time zone.
- Eastern
 - Central
 - Mountain
 - Pacific

HARDWARE AND NETWORK REQUIREMENTS

HTML5 COMPLIANT IQ3 WEB INTERFACE

Any computer that meets the network minimum requirements and is equipped with an HTML5 Compliant browser will be able to access and use the Web Interface. For more detailed information, reference the IQ3 Enterprise Security Paper.

INTERFACES

Two interfaces will be used during an IQ3 Event; a mobile iOS or Android Device and an HTML5 Compliant Browser running on a PC, Mac, Tablet, Phone or Linux Operating System.

MOBILE DEVICE

Any Android or iOS device running the latest version of the software will be able to both be a host and join IQ3 Events.

NETWORK REQUIREMENTS

IQ3 makes use of proprietary network architecture and cutting-edge technologies streamlined through cloud-enabled applications. This places a certain amount of dependence on network conditions and security. The required criteria for the network's configuration are:

- Minimum Bandwidth - 2mbps Upload/Download capabilities.
- Firewall Exceptions – Port 80 TCP/UDP must remain unrestricted between the HTML5 Web Interface and the WAN. Which is standard for most browser instances.

HARDWARE REQUIREMENTS FOR IQ3 APP

The following is required to use the IQ3 APP:

- Android or iOS Tablet running the current operating system.

UNDERSTANDING AND SETTING UP YOUR WORKFLOW

This is the most crucial section that will insure your successful implementation of IQ3. Our understanding of your current workflow will help us set up your workflow. Your Sales Engineer will be instrumental in setting up your workflow within the IQ3 platform. This includes all bookmarks markers and preferences specific to your workflow.

UNDERSTANDING YOUR WORKFLOW

IQ3 was designed with the inspector in mind first. To best understand your inspector's workflow, we require our Sales Engineer to shadow you or someone from your team through their regular inspection events.

SYSTEM CONFIGURATION FOR IQ3 APP WORKFLOW

To configure your IQ3 system, Your Revcord Sales Engineer will require all key information related to your inspections, investigations, or interviewing events.

Please provide your Sales Engineer the following information:

- Inspection / Investigation / Interview checklist.
- Code or Ordinance catalogue or menu related to your workflow.
- Ordinances / Codes / Canned Comments (Any common note responses to "garden variety" situations).
- Any Special Related Needs.

USER INFORMATION

Please provide us some basic user information for your system. Detailed access privileges will be configured during your training session.

(Please note accounts marked Admin will automatically have all privileges granted.)

DEFINITIONS

Administrator - Has full rights and access to all functionality of the software and can give rights to any Non-Admin User.

Non-Admin - All Non-Admin User rights and permissions are issued by the Administrator based on roles and responsibilities.

Examples of different permissions an Administrator can issue to Non-Admin personnel

- a. **Manager** - Create New Users, Change/Edit Bookmarks
- b. **Supervisor** - Access to reports, monitoring, dashboard, evaluations, custom fields
- c. **Back office** - Support Administrators
- d. **Read-only Users** - MMS Settings review of IQ3's Enterprise Data Management

All user accounts will be configured to a standard, generic access for the first sign-in, using the Email Addresses provided. For example, user John Public will use the login credentials

Login ID: JohnQPublic@emailaddress.com **Password:** 1234567a

YOUR IQ3 TEAM

Name	Admin? Y/N	Contact Email	Phone

USER SIGN-OFF FOR BOSS DOCUMENT INFORMATION

Your signature on this document confirms that the Revcord “prep work” is complete, and you have provided as much information as possible for your system to be moved into onsite onboarding by the Operations Team and your Sales Engineer. Please note that this signature will initiate the installation process. Any changes or modifications to the system from this point on could result in delays.

Signature/Date – Customer		Signature/Date – Revcord	
Signature:		Signature:	
Print first and last name:		Print first and last name:	
Title:	Date:	Title:	Date: