

RMM Complete Offering Data Requirements

Configuration Name

Field Name

Impact

About This Company

Hours of Operation - Holidays	Critical
Hours of Operation - Mon-Fri	Critical
Hours of Operation - Weekend	Critical
Location Address (Street, City, State, Zip Code)	Critical
Location Name	Critical
New & Former User Contact	Critical
Permissions Contact	Critical
Primary Contact	Critical
Remote Location 1 Address	Critical
Remote Location 1 Name	Critical
Technical Contact	Critical
Type of Business	Critical
Known Issues	Impactful
Mapped Drives Information	Impactful
Active Directory: Copy another user?	Beneficial
Active Directory: Default Password Format	Beneficial
Active Directory: User Account Steps	Beneficial
Active Directory: User Creation Steps:	Beneficial
Active Directory: Username scheme	Beneficial
Email: Copy another user?	Beneficial
Email: Email creation steps:	Beneficial
Email: Email Removal Steps	Beneficial
Line of Business Application 2: User creation steps	Beneficial
Line of Business Application 3: User creation steps	Beneficial
Network location of PST files	Beneficial

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Notes	Beneficial
Scan to email: User creation steps	Beneficial
Scan to folder: User creation steps	Beneficial
VPN access (Fortigate Only):	Beneficial

Active Directory

AD Full Name	Critical
Domain Admin Password	Critical
Domain Admin User Name	Critical
Server Local Admin Password	Beneficial
Server Local Admin User Name	Beneficial
Workstation Local Admin Password	Beneficial
Workstation Local Admin User Name: Critical for Workgroup environments but not for domains	Beneficial

Applications

Multiple Entries Possible

Account/Maintenance Agreement #	Critical
Name	Critical
Power User (User that knows about the application)	Critical
Support Contact Information	Critical
Admin Access Method	Impactful
Admin Password	Impactful
Admin Username	Impactful
Business Impact (Describe business impact of outage)	Impactful
Client Access Method	Impactful
Has this application been customized	Impactful
If customized, what is the contact information	Impactful
Importance	Impactful
Storage Locations	Impactful
Support Website	Impactful
Notes	Beneficial
Purpose	Beneficial

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Service Location	Beneficial
Version	Beneficial
Website Password (if needed)	Beneficial
Website User Name (if needed)	Beneficial
When updating clients do all clients require updating	Beneficial

Backup - Non Collabrance Service

Backup Description	Impactful
Backup Frequency	Impactful
Backup Technology	Impactful
Backup Type (Solution)	Impactful
Backup Window	Impactful
Excluded Drives	Impactful
Excluded Servers	Impactful
Protected Servers	Impactful

Company Contacts

Multiple Entries Possible

Email Address	Critical
Name	Critical

Current Email Solution

Domains	Critical
Type	Critical
Location	Impactful
Mobile Device Setup Info	Impactful
Webmail URL	Impactful
Notes	Beneficial
Vendor Notes	Beneficial

Distribution Lists

Distribution List	Critical
Email Address	Critical

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Members (First Name, Last Name)	Critical
Firewall (Non Fortigate)	
<i>Multiple Entries Possible</i>	
Firewall Administration Access Method	Impactful
Firewall Login ID:	Impactful
Firewall Login Password:	Impactful
Firewall Manufacturer / Model #	Impactful
Firewall support information	Impactful
Firewall Configuration Backup Attached	Beneficial
Firewall Configuration Backup Update Date	Beneficial
Internet-WAN	
<i>Multiple Entries Possible</i>	
Account Number	Critical
Gateway Address	Critical
Internet Service Provider (ISP)	Critical
ISP Support Phone Number	Critical
Location(s)	Critical
Notes (Port Forwarding)	Critical
Public IP Address	Critical
Subnet Mask	Critical
DNS 1	Impactful
WAN IP Type	Impactful
Download Speed (Mbps)	Beneficial
Link Type	Beneficial
Notes	Beneficial
Upload Speed (Mbps)	Beneficial
LAN	
<i>Multiple Entries Possible</i>	
LAN DNS 1	Critical
LAN Gateway IP	Critical
LAN Management IP	Critical
LAN Subnet Mask	Critical

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
VLAN(s)	Critical
DHCP Scope	Impactful
LAN DHCP handled by?	Impactful
LAN DNS 2 (If applicable)	Impactful
LAN DNS 3 (If applicable)	Impactful
DHCP Exclusions:	Beneficial
LAN Notes	Beneficial

Licensing

Multiple Entries Possible

License Key(s)	Impactful
Name	Impactful
Additional Notes	Beneficial
Manufacturer	Beneficial
Purchase Date	Beneficial
Renewal Date	Beneficial
Seats	Beneficial

Mailbox Forwarding

Forwarding Options	Critical
Forwarding To	Critical
User	Critical

Mailbox Permissions

On Mailbox	Critical
Permission	Critical
User	Critical

Mapped Network Drives

Multiple Entries Possible

Disk Path (i.e. - D:\Users)	Impactful
Mapped Drive (i.e. - U:\)	Impactful
Share Name (i.e. - Users)	Impactful
Share Path (i.e. - \\SERVER\Users)	Impactful

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name

Impact

Phone System

Technology	Critical
Vendor Name	Critical
Vendor Support Contact Info	Critical
DHCP Options	Impactful
Type	Impactful
Manufacturer	Beneficial
Notes	Beneficial

Printing

IP Address	Critical
Make / Model	Critical
Shared Name	Critical
Authenticating Password	Impactful
Authenticating UserName	Impactful
Drivers Path	Impactful
Print Server(s)	Impactful
Published to AD?	Impactful
Sending Email Address	Impactful
SMTP Server	Impactful
Use SSL or TLS?	Impactful
Deployment (How is the printer deployed to users?)	Beneficial
EquipID	Beneficial
Notes	Beneficial
Password	Beneficial
Physical Location (Office, Floor etc)	Beneficial
Site (i.e. New York, Los Angeles, etc)	Beneficial
Username	Beneficial

Public DNS Settings

Multiple Entries Possible

DNS Magement Company	Critical
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Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
DNS Password	Critical
DNS URL	Critical
DNS Username	Critical
Domain Name	Critical
DNS Expiration Date	Impactful
Name Server 1	Impactful
Registrar	Impactful
Registrar Password	Impactful
Registrar URL	Impactful
Registrar Username	Impactful
SSL Cert Provider	Impactful
SSL Expiration Date	Impactful
SSL Key	Impactful
SSL Management URL	Impactful
SSL Name	Impactful
SSL Password	Impactful
SSL Username	Impactful
Name Server 2	Beneficial

Public Folders, Calendars

Email Address	Critical
Name	Critical
Parent Folder	Critical
Who has access, what level	Critical

Quickbooks

Only needed if Quickbooks is being us

Account/Maintenance Agreement #	Critical
Path to Backup file (.qbb)	Critical
Path to company file (.qbw)	Critical
Power User (User that knows most about the application)	Critical
Product (Version and Release)	Critical
Support Contact Information	Critical

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Add-ons such as QuickBooks Payroll	Impactful
Admin Access Method	Impactful
Business Impact (Describe business impact of outage, i.e. - Sales unable to occur)	Impactful
Has this application been customized	Impactful
If customized, what is the contact information	Impactful
Importance	Impactful
Support Website	Impactful
Admin Password	Beneficial
Admin username	Beneficial
Client Access Method	Beneficial
Notes	Beneficial
Purpose	Beneficial
Service Location	Beneficial
Storage Locations	Beneficial
Version	Beneficial
Website Password (if needed)	Beneficial
Website User Name (if needed)	Beneficial
When updating clients do all clients require updating	Beneficial

Resource Mailboxes

Email Address	Critical
Name	Critical

Scan to Folder

Printer	Impactful
Scan Folder Password	Impactful
Scan Folder Path	Impactful
Scan Folder Username	Impactful

Switches (Managed)

Multiple Entries Possible

Password	Impactful
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Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Support Phone #	Impactful
Management IP Address	Impactful
Manufacturer	Impactful
Model	Impactful
Support Contract/Account #	Impactful
Username	Impactful
Notes	Beneficial

Switches (Unmanaged)

Multiple Entries Possible

Manufacturer	Beneficial
Model	Beneficial
Notes	Beneficial

UPS

Multiple Entries Possible

Access Method	Impactful
Password	Impactful
UPS Brand Name	Impactful
User Name	Impactful
Misc. Info	Beneficial
Servers attached to UPS	Beneficial

User Mailboxes

Aliases	Critical
Email Address	Critical
Name	Critical
Size	Critical

Virtualization

Multiple Entries Possible - Only needs

Host management software installed on?	Critical
Host Server	Critical
IP Address	Critical
Root Password	Critical

Critical - Needed for Service Activation

Impactful - Needed Within 90 Days

Beneficial - Collect When Possible

Configuration Name

Field Name	Impact
Virtualization Technology Used	Critical
vSphere/vCenter Password	Critical
vSphere/vCenter Username	Critical
Is the host on the domain	Impactful
Is this the Core version	Impactful
Virtual Guest Server Name	Impactful
Virtual Guest Server Name	Impactful
Virtual Guest Server Name	Impactful
Virtual Guest Server Name	Impactful
Virtual Guest Server Name	Impactful
Connection Method	Beneficial
Disk Management IP Address	Beneficial
Disk Mgmt Password	Beneficial
Disk Mgmt Username	Beneficial
Disk Platform	Beneficial
HyperV Interface	Beneficial
Management Tool Used	Beneficial

Wireless

Multiple Entries Possible

Pre-Shared Key	Critical
SSID	Critical
WiFi Access to Local Resources	Impactful
WiFi Notes	Beneficial