Server Moves & Upgrades

MSCRM v4 - 2015

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| **This document will need to be completed and returned to CommuniGator by 5PM on the Friday before any planned work is due to take place. This is to ensure that the details can be checked and that the work will be completed on schedule.**  **Late submissions may result in work being rescheduled or delayed.** |

If you have you have any questions at any time please use our online resources on our website at [www.communigator.co.uk/help](http://www.communigator.co.uk/help). If this does not contain the information you require please contact [support@communigator.co.uk](mailto:support@communigator.co.uk).

## Requirements

* Windows Domain User and Password
  + This user will need to have permissions set to ensure that their password does not expire.
  + If using Windows Authentication for MS CRM the Domain user will need to be setup as a CRM user with the System Administrator security role applied.
  + The user will need to be a member of the Priv User Group and SQL Access Group.
* Windows Domain Name.
* CommuniGator URL (unrequired If Hosted).
* CommuniGator LZ URL (unrequired If Hosted).
* CommuniGator Username and Password (unrequired If Hosted).
* Application Server Details.
  + IP Address.
  + Server Name.
  + MS CRM Database Name.
  + MS CRM META Database Name.
  + MS CRM URL. This should be the URL that users use to access the application.
  + MS CRM Install Directory.
  + Directory where integration should be installed.
* Database Server Details.
  + IP Address.
  + Server Name.
* MS .NET Framework 4 will need to be installed on the CRM Application Server.
* A middleware database will be created on the DB server. Therefore permission to create a Database is required.

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| Description of work | |
| **Please describe the work you are carrying out e.g “**We are moving our crm 4 DB and App to new servers and upgrading to crm 2011**.”**  **“**Integration Upgrade Only.**”** |  |

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| Requirements | |
| **Current CRM Application Server Name / IP:** |  |
| **Current CRM DB Server Name / IP:** |  |
| **Is the CRM Application Server changing?: If so,** |  |
| **Old Server Name / IP:**  **New Server Name / IP:**  **The old server will need to be accessed to switch off the current integration. Is it still accessible?** |  |
| **Is the CRM DB Server changing?: If so,** |  |
| **Old Server Name / IP:**  **New Server Name / IP:**  **The \_Gator integration DB will need to be transferred to the new server. Will this have been done already?** |  |
| **Is the CRM being upgraded during this process?: If so,** |  |
| **Old Version:**  **New Version:** |  |
| **CommuniGator Solution version name and number:**  **(Find this under settings – solutions)** |  |
| **Do you currently have a preference centre in CommuniGator? If so please specify the name of the unsubscribe process. (Tools – Unsubscribe)** |  |

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| Addition Information | |
| **Who manages your MSCRM infrastructure?**  **Please provide name and contact details.** |  |
| **Who Administers your MSCRM software?**  **Please provide name and contact details.** |  |
| **Contact available on the day (if different):** |  |
| **Remote Access Details:** |  |

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| Sign off | |
| **Completed By:** |  |
| **Date:** |  |
| **Signature:** |  |