

Server Upgrade Planning Guide

A practical guide to preparing for a smooth,
secure server transition.

BUSINESS NAME

TARGET UPGRADE DATE

COMPLETED BY

CURRENT SERVER AGE

Access Your Current Server

CURRENT
STATE

Mark each item Ready or Review.

Note anything that requires additional planning or support.

READINESS ITEM	READY	REVIEW
Age & Support		
Server is within its supported lifecycle	☐	☐
Warranty and vendor support are active	☐	☐
Capacity & Performance		
Storage capacity supports current needs	☐	☐
Performance is stable during peak use	☐	☐
Applications & Dependencies		
Critical applications are documented	☐	☐
Connected devices and integrations are known	☐	☐
Backup & Recovery		
Backups are current and tested	☐	☐
Recovery requirements are documented	☐	☐

Build Your Upgrade Plan

YOUR NEXT
STEP

Use your review findings to organize the work before scheduling the upgrade.

1 - Inventory

Confirm hardware, applications, users, and dependencies.

2 - Prepare

Set the budget, timeline, backup plan, and responsibilities.

3 - Transition

Schedule installation, testing, user communication, and follow-up.

Ready to Plan Your Upgrade?

Talk with the Forensic IT Team to review your current environment and build a practical transition plan.