Server Migration Checklist

SECURE TRANSPORTATION SINCE 1996



A practical, phase-by-phase checklist for moving servers and IT infrastructure between rooms, buildings, or data centres with the least possible downtime

1. Purpose:

This checklist helps IT managers, infrastructure leads, and project managers plan and control the physical side of a server migration, from the first audit to sign-off at the new site.

It helps to reduce:

- unplanned downtime
- equipment damage in handling and transit
- missing rails, cables, and parts at the destination
- re-rack errors
- loss of control over data-bearing assets
- surprises on move day

This checklist is particularly useful for:

- **server room relocations**
- **data centre migrations**
- **colocation moves**
- **office moves that include a comms room**
- **consolidation and decommissioning projects**

2. Scope:

This checklist covers the physical move: audit, shutdown sequence, de-rack, packing, transport, re-rack, and handover.

It does not cover application migration, data replication design, or network architecture. Those sit with the client's technical team and should be planned alongside this checklist.

3. Phase 1: Plan and Scope (8 to 12 weeks before):

- [ ] Business owner and technical lead named
- [ ] Reason, scope, and target date agreed
- [ ] Move method chosen: single move, phased move, or swing kit
- [ ] Permitted downtime window agreed with the business
- [ ] Origin and destination sites surveyed
- [ ] Route from rack to vehicle checked at both ends
- [ ] Specialist mover appointed
- [ ] Insurance cover for the equipment in transit confirmed
- [ ] Risks and dependencies logged

4. Phase 2: Audit and Design (4 to 8 weeks before):

- [ ] Full asset list produced with make, model, and serial number
- [ ] Rack elevations recorded for every rack at origin
- [ ] Front and rear photos taken of every rack
- [ ] Cabling and port mapping recorded
- [ ] Destination rack layout designed and approved
- [ ] Power, cooling, and floor loading confirmed at destination
- [ ] Network and cross-connects ordered at destination
- [ ] Shutdown and start-up order agreed
- [ ] Equipment for disposal identified and separated in the plan

5. Phase 3: Prepare (1 to 4 weeks before):

- [ ] RAMS issued and approved
- [ ] Building management packs submitted at both sites
- [ ] Loading bay and lift bookings confirmed
- [ ] Access lists and security passes arranged
- [ ] Labelling convention agreed for devices, cables, and rails
- [ ] Packing materials, cases, and anti-static protection confirmed
- [ ] Full backups completed and a restore tested
- [ ] Support and vendor contacts on standby for the move window
- [ ] Rollback plan agreed

- [ ] Final go or no-go meeting held

6. Phase 4: Shutdown and De-Rack:

- [ ] Change freeze in place
- [ ] Final backup verified
- [ ] Systems shut down in the agreed order by authorised technical staff
- [ ] Each device labelled with its origin and destination rack position
- [ ] Cables labelled at both ends before removal
- [ ] Rails, brackets, and screws bagged and labelled with the parent device
- [ ] Serial numbers checked against the asset list as each device is removed
- [ ] Devices packed with anti-static and impact protection
- [ ] Chain of custody record started

7. Phase 5: Transport:

- [ ] Load checked against the asset list before the doors close
- [ ] Equipment secured against movement in transit
- [ ] Vehicle sealed or locked, with the seal reference recorded
- [ ] Driver and crew details shared with the destination site
- [ ] Vehicle not left unattended unless secured
- [ ] Arrival time confirmed with the destination

8. Phase 6: Re-Rack and Reconnect:

- [ ] Count and serial check completed on arrival
- [ ] Packaging inspected for damage before opening
- [ ] Devices installed to the approved rack layout
- [ ] Weight spread sensibly, heaviest equipment lowest
- [ ] Power connected to the planned feeds
- [ ] Cabling patched to the port map
- [ ] Cable management completed
- [ ] Systems powered up in the agreed order by authorised technical staff

9. Phase 7: Test and Hand Over:

- [ ] Hardware health checked on every device
- [ ] Network connectivity confirmed
- [ ] Services tested by their owners
- [ ] Monitoring and alerts confirmed working
- [ ] Asset list reconciled, with any exceptions logged
- [ ] Packaging and waste removed
- [ ] Redundant equipment sent for certified disposal where in scope
- [ ] Client sign-off captured
- [ ] Lessons learned recorded

10. Common Server Migration Mistakes to Avoid:

- no accurate asset list before the move
- cables removed without labels
- rails and screws packed separately from their device
- backups taken but never test-restored
- destination power or cooling not checked
- start-up order not agreed in advance
- no rollback plan
- move window too tight for testing

11. Recommended Supporting Documents:

- asset register with serial numbers
- rack elevations for origin and destination
- port and cable map
- RAMS and method statement
- building management pack for each site
- chain of custody record
- shutdown and start-up runbook
- contact and escalation sheet

12. Why this checklist matters:

A structured **server migration checklist** helps:

- keep downtime inside the agreed window
- protect high-value, business-critical equipment
- make re-rack fast and accurate
- keep every data-bearing asset accounted for
- give the business confidence before move day
- leave a record that stands up to audit

Most server move problems are planning problems. They are far easier to fix eight weeks before than at two in the morning.

13. Related Secure Transportation services:

- Server Relocation Specialists
- IT Relocation and Data Centre
- Pre-Staging Facility
- RAMS and Method Statements
- Programme Management and Compliance
- Secure Transport UK and Europe
- ITAD, Data Destruction and WEEE

14. Quick Move-Day Summary Checklist:

- ☐ Go decision confirmed
- ☐ Backups verified
- ☐ Shutdown complete in order
- ☐ Every device and cable labelled
- ☐ Asset list checked at load and at unload
- ☐ Racked to plan
- ☐ Powered up in order
- ☐ Services tested
- ☐ Sign-off captured