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**Pre-upgrade Checklist**

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1. Introduction

This guide is meant to assist you in preparing for an upgrade. Use this guide as a template as you prepare for the upgrade process completing each step in order.

1. Pre-upgrade checklist

Complete the following items before beginning your Relativity upgrade.

[ ]  Gather current environment information

Make note of the following information to use during your upgrade discussion with Relativity Client Services before you begin an upgrade.

**Upgrade date:**

**Current Relativity version:**

**New Relativity version:**

[ ]  Gather environment usernames and passwords

Use the following table to record relevant usernames and passwords needed during an upgrade.

|  |  |
| --- | --- |
| **Instance Information** | **Username and password** |
| Relativity Service Account Username |  |
| Relativity Service Account Password |  |
| EDDSDBO Account Password |  |
| Analytics REST API Username |  |
| Analytics REST API Password |  |

[ ]  Gather Relativity server information

Use the following table to record the names of your instance servers, the role they play in administering your environment, and the unique IP address of each server.

|  |  |  |
| --- | --- | --- |
| **Server Name** | **Relativity Role** | **IP Address** |
| SQL01 | SQL Server - Primary | 10.0.0.1 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

[ ]  Contact Relativity Client Services

Contact [Relativity Support](https://community.relativity.com/s/contactsupport) to begin upgrade planning. A Relativity Client Services representative will inform you of any special considerations, such as extended downtime, to keep in mind for your upgrade path. Then, review any custom applications and ensure necessary compatibility. Record any notes in the table below.

**Due Date: Owner:**

|  |
| --- |
| **Special considerations** |
|  |
|  |
|  |
|  |

[ ]  Review relevant upgrade documentation

The Relativity upgrade documentation contains necessary upgrade considerations and required processes you must follow during an upgrade. Review the [upgrade documentation](https://help.relativity.com/Server2024/Content/Installing_and_Upgrading/Relativity_Upgrade/Relativity_upgrade.htm) and take note of any special considerations and other applications that may require upgrades.

**Due Date: Owner:**

[ ]  Run an upgrade test

It is recommended to run an upgrade test in a test environment before you upgrade your environment. Every client is entitled to a free test license. Run an upgrade test against a test instance to identify any problem areas you may encounter during upgrade. Make sure to document times and any problem areas you encounter during the test upgrade in the following table.

**Due Date: Owner:**

|  |  |
| --- | --- |
| **Problem area** | **Time of occurrence** |
|  |  |
|  |  |
|  |  |
|  |  |

[ ]  Complete upgrade action items

Use the following tables as templates to record and customize necessary action items to complete as part of your upgrade workflow. Take into consideration the servers for your environment, any upgrade considerations discussed with Relativity Client Services, and any other relevant information. You can also assign an owner and due date for each action item on your checklist.

Make sure to take note of how long it takes to upgrade your production environment. This information helps in estimating downtime for future upgrades.

If you’re unsure of where to begin, refer to the [upgrade documentation for your path](https://help.relativity.com/Server2024/Content/Installing_and_Upgrading/Relativity_Upgrade/Relativity_upgrade.htm).

**Note:** The information in the following tables are meant to serve as an example of some typical upgrade action items. Customize the tables as needed for your particular upgrade.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Server** | **Tasks** | **Task Details** | **Owner** | **Completed** | **Time Started** | **Time Completed** |
| *Web01* | 1. *Stop IIS services.*
2. *Stop the Relativity Web Processing service.*
3. *Backup web.config files*
 |  |  |  |  |  |
| *Agent01* | 1. *Verify no agent jobs ae running on the agent server.*
2. *Stop the Agent service.*
 |  |  |  |  |  |
| *SQL01* | *Run the Relativity installation package.* |  |  |  |  |  |
| *Relativity service bus* | *Run the Relativity installation package.* |  |  |  |  |  |
| *Web01* | 1. *Run the Relativity installation package.*
2. *Start the IIS services.*
3. *Start the Relativity Web Processing service.*
 |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Server** | **Tasks** | **Task Details** | **Owner** | **Completed** | **Time Started** | **Time Completed** |
| *ProcessingSQL* | *Run the Invariant installation package.* |  |  |  |  |  |
| *Analytics01* | *Run the Relativity Analytics installation package.* |  |  |  |  |  |
| *Final Check* | *Complete the Post-Installation Verification Test after your upgrade is complete.* | *Use the Post-Installation Verification Test document* |  |  |  |  |