

IT Maintenance Visit

Routine IT maintenance visit: comms room, UPS, servers and storage, backups, updates, network and PC checks, with defects and sign-off.

1. Job details

The job and the site.

Project

Filled in from the project in SiteSurvey.

Job or contract reference

Customer

Site *

Address

Date of visit *

Arrival time

Type of visit * (choose one)

☐ Planned maintenance ☐ Call-out for a fault ☐ Return visit

What was reported, and by whom? (if applicable)

Reference of the earlier job (if applicable)

Engineer name

2. Comms or server room

The room the equipment lives in.

Is the room or cabinet locked?

☐ Yes ☐ No

Temperature at the front of the cabinet (°C)

If applicable: This is above 27 °C, the top of the ASHRAE recommended range for air going into IT equipment. Check the cooling and anything blocking the airflow.

Cooling (choose one)

☐ Working ☐ Not working ☐ None fitted

Is the room clean, dry and free of stored items?

☐ Yes ☐ No

Any sign of water, leaks or pipes above the equipment?

☐ Yes ☐ No

Photos of the room and cabinet (photos: attach, or note the file names)

3. UPS

Battery backup for the servers and network.

Is there a UPS?

☐ Yes ☐ No

UPS make and model (if applicable)

Status on the display (if applicable; choose one)

☐ Normal ☐ On battery ☐ Alarm or fault showing ☐ Replace battery warning

If applicable: Tell the site contact now: the equipment could lose power without warning.

Load (%) (if applicable)

Runtime shown (minutes) (if applicable)

Age of the batteries (years) (if applicable)

Self test (if applicable; choose one)

☐ Passed ☐ Failed ☐ Not run

If applicable: UPS batteries wear out and the life depends on the type and the room temperature. Check the maker's replacement interval against the age you recorded.

4. Servers and storage

One entry for each server, NAS or host.

Are there servers or storage devices on site?

☐ Yes ☐ No

Servers and storage (copy this block for each one; if applicable)

Name *

What it does

Hardware lights and alerts (choose one)

☐ Normal ☐ Warning ☐ Fault

Disks or RAID (choose one)

☐ Healthy ☐ Degraded ☐ Failed

If applicable: A degraded array has lost its protection: another disk failure could lose the data. Replace the disk and check the last backup before you leave.

Free disk space (%)

If applicable: Under 15% free. Plan a clean up or more storage before it fills.

Does the operating system still get security updates? (choose one)

☐ Yes ☐ No ☐ Not known

If applicable: Cyber Essentials requires software to be licensed and supported, and removed from devices when it becomes unsupported. Raise a replacement or upgrade with the customer.

Security updates (choose one)

☐ Up to date ☐ Installed on this visit ☐ Outstanding

Event logs reviewed?

☐ Yes ☐ No

Anti-malware running and up to date?

☐ Yes ☐ No

Errors found and action taken

If applicable: Updates. Cyber Essentials requires updates that fix critical or high risk vulnerabilities to be installed within 14 days of release.

Servers checked (if applicable; worked out automatically in the app)

5. Backups

Whether the data could be brought back today.

Last backup job * (choose one)

☐ Completed ☐ Completed with errors ☐ Failed ☐ No backup set up

Date of the last good backup (if applicable)

Days since the last good backup (if applicable; worked out automatically in the app)

If applicable: There is no working backup. Tell the customer today and record who you told.

Is there a copy off site or in the cloud?

☐ Yes ☐ No

Did you restore a file as a test on this visit?

☐ Yes ☐ No

Date of the last restore test (if applicable)

Backup notes

6. Network and subscriptions

Firewall, switches, Wi-Fi and anything about to expire.

Firewall firmware (choose one)

- ☐ Up to date
☐ Updated on this visit
☐ Update outstanding
☐ No longer supported
☐ Not checked

Switches (choose one)

- ☐ OK ☐ Defect ☐ Not checked

Wi-Fi (choose one)

- ☐ OK ☐ Defect ☐ Not checked

Internet speed, download (Mbps)

Internet speed, upload (Mbps)

Is anything due to expire in the next 90 days?

Licences, warranties, domain names, certificates, support contracts.

☐ Yes ☐ No

What, and when? (if applicable)

7. PCs and laptops

Optional: one entry for each device you check.

Did you check any PCs or laptops?

☐ Yes ☐ No

Devices checked (copy this block for each one; if applicable)

Device name or asset tag *

User

Updates (choose one)

☐ Up to date ☐ Installed on this visit ☐ Outstanding

Anti-malware (choose one)

☐ Running and up to date ☐ Out of date ☐ Not installed

Free disk space (%)

Cleaned: vents, keyboard, screen?

☐ Yes ☐ No

Issues found and action taken

Devices checked (if applicable; worked out automatically in the app)

8. Outcome and parts

How the system was left and what happens next.

Outcome of the visit * (choose one)

☐ No issues outstanding ☐ Issues outstanding ☐ Urgent issue outstanding

What needs doing next, and who will do it? (if applicable)

Recommendations

Did you use any parts or materials?

☐ Yes ☐ No

Parts and materials used (copy this block for each one; if applicable)

Item

Part number

Quantity

Next visit due

Departure time

9. Sign-off

Customer and engineer.

Is the customer or their representative available to sign?

☐ Yes ☐ No

Why not, and who will you send the report to? (if applicable)

Customer name (if applicable)

Position (if applicable)

Customer comment (if applicable)

Customer signature (if applicable)

Engineer name

Engineer signature