

Moodle Upgrade Readiness Check

Upgrades are often where the strain of running Moodle shows most. In our experience, the hardest parts are rarely Moodle itself. They are the environment, testing, timing and ownership around it.



You can with Catalyst.



HOW TO USE THIS

Use this before committing to an upgrade date, during planning, or as a final readiness check. Complete it on screen, or print it and work through it with your Moodle, learning technology and IT teams.

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A difficult question is useful. If you can't confidently answer it, you've probably found something worth resolving before the upgrade begins.



01 Why are we upgrading?

What is the main reason for this upgrade?

What do we expect the upgrade to deliver?

What happens if we don't upgrade now?

Is our current Moodle version still receiving security fixes?

☐ Yes ☐ No ☐ We need to check

Which Moodle version are we moving to, and why that one?

Is it a Long Term Support (LTS) release, and does that matter for us?

☐ Yes ☐ No ☐ Not sure

Are all our critical plugins and integrations compatible with it?

☐ Yes ☐ No ☐ Still checking



FROM OUR TEAM

An upgrade with a clear purpose is easier to test, communicate and sign off. "We're behind" is a reason to start, not a plan.

02 Do we understand our current Moodle environment?

Which parts of our Moodle environment need to be considered?

- | | |
|--|---|
| ☐ Plugins | ☐ Integrations |
| ☐ Custom development | ☐ Theme and customisations |
| ☐ Authentication and SSO | ☐ Reporting |
| ☐ External university systems | ☐ Other |

Which of these would have the biggest impact if it stopped working?

Does our infrastructure meet the new version's requirements (PHP, database, server)?

- ☐ Yes ☐ No ☐ Needs investigation

Is there anything we're maintaining that we no longer need?

Have we identified technical debt that could affect the upgrade?

- ☐ Yes ☐ No ☐ Needs investigation

Notes and actions

FROM OUR TEAM



Upgrade problems rarely start in core Moodle. They tend to sit in the plugins, customisations and integrations added over the years, often by people who have since moved on.

03 Have we chosen the right time?

What is our proposed upgrade window?

What is happening in the academic calendar around that date?

- | | |
|--|---|
| ☐ Assessments and exams | ☐ Enrolment |
| ☐ Results | ☐ Course creation and rollover |
| ☐ Staff training | ☐ Major teaching periods |
| ☐ None of these | |

Are other major technology changes happening at the same time?

Will the people we need for testing and support actually be available?

☐ Yes ☐ No ☐ To be confirmed

If we decide to wait, when will we review the upgrade again?



FROM OUR TEAM

The right window isn't simply the quietest week. It's the week when the people who can test and fix things are actually around.



04 Can we properly test the upgrade?

Does staging match live closely enough for testing to mean something?

☐ Yes ☐ Partly ☐ No

What are the five Moodle journeys we absolutely cannot afford to break?

1		2	
3		4	
5			

Which of these areas does our test plan cover?

- | | | |
|--|--|--|
| ☐ Login and SSO | ☐ Enrolment and course access | ☐ Assignment submission |
| ☐ Quizzes and timed assessments | ☐ Grading and gradebook | ☐ Roles and permissions |
| ☐ Reporting | ☐ Notifications | ☐ Accessibility |
| ☐ Mobile and browser behaviour | ☐ Plugins | ☐ External integrations |

Have we tested performance under realistic peak load?

☐ Yes ☐ No ☐ Not planned

Have we tested a full backup restore and rollback?

☐ Yes ☐ No ☐ Not planned

Who needs to be involved in testing?

What has to work before we're comfortable going live?



FROM OUR TEAM

If staging doesn't match live in data, plugins, integrations and load, testing tells you less than you think.

05 Is ownership clear?

Who owns the overall upgrade?

Who makes the final go/no-go decision?

Who owns testing?

Who owns communications to staff and students?

Who will investigate issues found during testing?

What would make us postpone or roll back the upgrade?

Who has the authority to make that call?



FROM OUR TEAM

Upgrades often stall on decisions rather than code. Agree who decides before you need them to.

06 What happens after go-live?

Who will monitor Moodle immediately after the upgrade?

Which critical journeys will we retest in production?

How will users report problems, and who picks them up?

What is the next high-demand period we need to monitor through?

When will we review how the upgrade went?



FROM OUR TEAM

An upgrade isn't finished at go-live. The first busy period afterwards is the real test.

Final sense-check:

what does this upgrade leave us with?

Step back from the project plan and look at where the upgrade leaves your Moodle.



Secure

Will this upgrade leave Moodle on a supported version, with security fixes in place?



Scalable

Can the upgraded platform stay stable through our real peaks, such as exams, enrolment and results?



Simplified

Have we used the opportunity to remove unnecessary complexity?



Standardised

Will we come out of this with a clearer, repeatable upgrade process?



Sustainable

Does this upgrade support where we want Moodle to be in the longer term?



Are we ready?

Overall readiness

☐ Ready to proceed

☐ Nearly ready – actions to complete

☐ Not ready yet – significant gaps

The three things we need to do next

	ACTION	OWNER	DUE
1			
2			
3			

Target Moodle version	Proposed upgrade date
Final go/no-go date	Upgrade owner

Want a second pair of eyes on your answers?

Our expert team will go through your worksheet with you: what's ready, what's worth resolving first, and what a smoother upgrade could look like.



SCAN TO START

START A CONVERSATION



Unlock the full potential of Moodle.
You can with Catalyst.