



ERP Resource Allocation & Capacity Planning Checklist 2026

Infrastructure & Hardware Capacity Assessment

Evaluate the adequacy of server resources, storage scaling, and computing power required to support ERP workloads and transaction volumes for the 2026 fiscal year.

Primary Server/Instance Name

Current CPU Utilization (%)

Available RAM (GB)

Deployment Environment

- ☐ On-Premise
- ☐ Cloud (SaaS)
- ☐ Hybrid

Last Hardware Audit Date

Enter date...

Server Performance Logs

 Upload File

Identified Resource Bottlenecks

- ☐ CPU Saturation
- ☐ Memory Exhaustion
- ☐ Disk I/O Latency
- ☐ Network Throughput

Expansion Recommendations

Write something...

Software License & Seat Management

Audit current user licenses, identify upcoming expiration dates, and plan for additional seat allocations based on projected headcount growth.

Current Number of Active User Licenses

Enter a number...

Projected New User Seats Required (2026)

Enter a number...

Next License Renewal Date

Enter date...

License Model Type

- ☐ Per User / Per Month (SaaS)
- ☐ Per Core / Processor
- ☐ Enterprise Agreement (Unlimited)
- ☐ Concurrent User License

License Modules Currently Active

- ☐ Finance & Accounting
- ☐ Supply Chain Management
- ☐ Human Capital Management
- ☐ Manufacturing / Production
- ☐ Sales & CRM

License Compliance Gap Analysis

Write something...

Upload Current License Agreement/Contract

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IT Manager Approval for Expansion

Human Resource & IT Staffing Alignment

Assess the availability of internal IT personnel, database administrators, and functional consultants needed to manage ERP maintenance and system updates.

Current IT Staffing Level

- ☐ Understaffed
- ☐ Adequate
- ☐ Overstaffed

Required Technical Skillsets for 2026

- ☐ Database Administration
- ☐ ERP Functional Consultancy
- ☐ Network Security
- ☐ Cloud Infrastructure Management
- ☐ Data Analytics & BI
- ☐ System Integration (API/Middleware)

Projected New Hires Required

Enter a number...

Staffing Review Completion Date

Enter date...

Training & Upskilling Plan Summary

Write something...

IT Director Approval

Database & Storage Growth Projection

Analyze historical data growth trends to forecast database expansion, log file management, and long-term storage requirements for unstructured data.

Current Database Size (GB/TB)

Enter a number...

Projected Annual Data Growth Rate (%)

Enter a number...

Last Database Audit Date

Enter date...

Primary Storage Tier

☐ SSD/NVMe (High Performance)

☐ Standard HDD (Archive)

☐ Cloud Object Storage

Storage Expansion Risk Assessment

Write something...

Upload Historical Growth Report

 Upload File

Network Bandwidth & Connectivity Planning

Review network throughput, latency requirements for remote sites, and bandwidth availability to ensure seamless ERP accessibility across all global locations.

Current Primary Connection Speed (Mbps)

Write something...

Projected Bandwidth Increase Requirement (%)

Enter a number...

Connectivity Types in Use

- ☐ Fiber Optic
- ☐ SD-WAN
- ☐ Satellite
- ☐ Leased Line
- ☐ 5G/LTE Backup

Network Latency Bottleneck Assessment

Write something...

Last Network Infrastructure Audit Date

Enter date...

Network Topology Diagram

 Upload File

Budgetary Allocation & Cost Forecasting

Define the budget for operational expenditures (OPEX), including cloud consumption costs, third-party support fees, and emergency scaling contingencies.

Total Annual ERP Operational Budget

Enter a number...

Budget Review Deadline

Enter date...

Primary Cost Center

- ☐ IT Infrastructure
- ☐ Operations
- ☐ Finance
- ☐ Supply Chain

Forecasted Cost Drivers

- ☐ Cloud Subscription Increases
- ☐ Additional User Licenses
- ☐ Hardware Upgrades
- ☐ Third-party Integration Fees
- ☐ External Consultant Fees

Budget Variance Contingency Plan

Write something...

Detailed Cost Breakdown Spreadsheet

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Business Process Load Analysis

Identify peak processing periods (e.g., month-end closing, seasonal surges) and allocate computational resources to prevent system bottlenecks during high-traffic windows.

Peak Processing Period Name

Write something...

Estimated Transaction Volume Increase

Enter a number...

Affected ERP Modules

- ☐ Finance
- ☐ Supply Chain Management
- ☐ Human Capital Management
- ☐ Manufacturing/Production
- ☐ Sales & Distribution
- ☐ Inventory & Warehouse

Peak Period Start Date

Enter date...

Risk Mitigation Strategy

Write something...

Department Head Approval

Disaster Recovery & Redundancy Provisioning

Ensure that failover environments, backup sites, and secondary processing nodes are adequately provisioned to handle full-scale ERP operations during a crisis.

Primary Disaster Recovery Site Type

- ☐ Cloud-Based (DRaaS)
- ☐ On-Premise Secondary Data Center
- ☐ Hybrid Configuration
- ☐ Hot Site (Real-time Replication)
- ☐ Warm Site (Periodic Sync)

Target Recovery Point Objective (RPO) in Minutes

Enter a number...

Target Recovery Time Objective (RTO) in Hours

Enter a number...

Last Disaster Recovery Drill Completion Date

Enter date...

Redundancy Verification Components

- ☐ Database Mirroring/Replication
- ☐ Off-site Backup Verification
- ☐ Network Path Redundancy
- ☐ Load Balancer Configuration
- ☐ Failover Automation Testing

Upload Latest DR Plan Documentation

 Upload File

IT Infrastructure Manager Approval

< Previous

> Next

✓ Finish

 **Generate Sample Report**