



ERP Change Management Checklist

Change Request Initiation

Covers the initial identification and documentation of the proposed change.

Detailed Description of Change Request

Write something...

Affected ERP Module(s)

- ☐ Finance
- ☐ Human Resources
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Sales & Marketing
- ☐ Inventory Management
- ☐ Other

Date of Request

Enter date...

Estimated Effort (in hours)

Enter a number...

Requestor Name

Write something...

Change Category

- ☐ Bug Fix
- ☐ Enhancement
- ☐ New Feature
- ☐ Security Update

Impact Assessment

Evaluates the potential effects of the change on various ERP modules and business processes.

Estimated Impact on Transaction Volume

Enter a number...

Affected ERP Modules

- ☐ Finance
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Human Resources
- ☐ Sales & Distribution

Description of Potential Business Process Disruptions

Write something...

Estimated Downtime (in hours)

Enter a number...

Risk Level (High/Medium/Low)

- ☐ High
- ☐ Medium
- ☐ Low

Date of Initial Impact Assessment

Enter date...

Change Approval & Prioritization

Details the approval workflow and prioritization process for change requests.

Change Requestor

- ☐ Finance
- ☐ Sales
- ☐ Operations
- ☐ IT
- ☐ Other

Estimated Effort (Hours)

Enter a number...

Impacted ERP Modules

- ☐ Finance
- ☐ Sales
- ☐ Inventory
- ☐ Manufacturing
- ☐ Human Resources
- ☐ Multiple Modules

Priority Level

- ☐ High
- ☐ Medium
- ☐ Low

Approval Due Date

Enter date...

Justification for Priority

Write something...

Approver 1 (Role)

- ☐ Department Head
- ☐ IT Manager
- ☐ Project Manager

Approver 1 Signature

Development & Testing

Outlines the steps for development, unit testing, and integration testing of the change.

Detailed Description of Development Work

Write something...

Estimated Development Hours

Enter a number...

Code Changes/Scripts

 Upload File

Development Start Date

Enter date...

Development Completion Date (Planned)

Enter date...

Number of Unit Tests Passed

Enter a number...

Integration Testing Environment

☐ DEV

☐ QA

☐ UAT

Integration Testing Results and Comments

Write something...

User Acceptance Testing (UAT)

Ensures that the change meets user requirements and functions as expected in a realistic environment.

Describe the UAT Test Scenario

Write something...

Number of Users Involved in Testing

Enter a number...

Test Environment Used (e.g., Dev, Staging)

- ☐ Development
- ☐ Staging
- ☐ Production-like

Modules Tested (Select all that apply)

- ☐ Finance
- ☐ Inventory
- ☐ Sales
- ☐ Manufacturing
- ☐ HR

Date of UAT Execution

Enter date...

Actual Results vs. Expected Results

Write something...

Overall UAT Result

- ☐ Passed
- ☐ Failed
- ☐ Partially Passed

Tester Signature

Deployment Planning

Covers scheduling, communication, and rollback strategies for the deployment phase.

Planned Deployment Date

Enter date...

Planned Deployment Start Time

Enter time...

Estimated Deployment Duration (hours)

Enter a number...

Detailed Deployment Steps & Checklist

Write something...


Deployment Environment (e.g., Dev, UAT, Production)

- ☐ Development
- ☐ UAT
- ☐ Production

Affected ERP Modules

- ☐ Finance
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Sales
- ☐ HR

Deployment Plan Document

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Rollback Plan (if required)

Write something...

Deployment Execution

Details the tasks involved in deploying the change to the production environment.

Scheduled Deployment Date

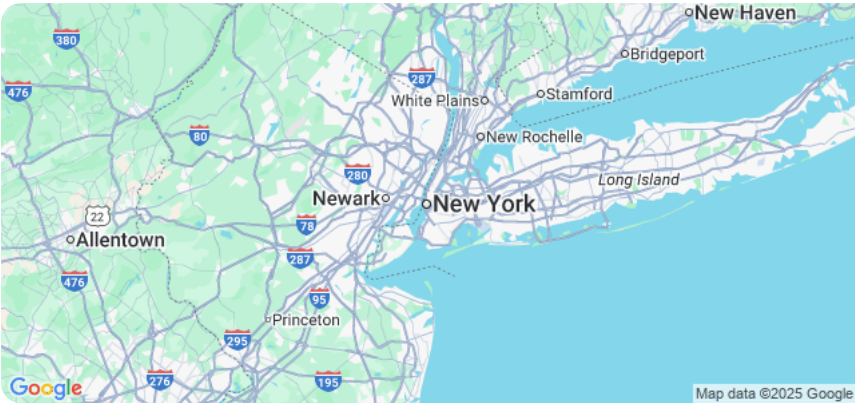
Enter date...

Scheduled Deployment Time

Enter time...

Deployment Server Location

 Set My Current Location



Deployment Notes & Observations

Write something...

Number of Users Impacted

Enter a number...

Deployment Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Failed

Deployment Lead Signature

Post-Implementation Review

Evaluates the success of the change, identifies lessons learned, and documents any necessary adjustments.

Review Date

Summary of Change Implementation

Estimated Effort vs. Actual Effort (Hours)

Successes and Positive Outcomes

Challenges and Areas for Improvement

Stakeholders Satisfied with Change?

- ☐ Yes
- ☐ No
- ☐ Partially

Lessons Learned & Recommendations

Write something...

Reviewer Signature

Documentation & Communication

Ensures updated documentation and effective communication to all stakeholders regarding the implemented change.

Summary of Changes Documented

Write something...

Updated Process Flow Diagrams

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Stakeholders Notified (Select all that apply)

- ☐ End Users
- ☐ Management
- ☐ IT Support
- ☐ Training Team

Date of Documentation Update

Enter date...

Communication Plan Summary

Write something...

Version Number of Documentation

Write something...

Security & Compliance Review

Verifies that the change adheres to security protocols and regulatory requirements.

Authorization Level Required for Change

Enter a number...

Compliance Regulations Affected (e.g., GDPR, SOX)

- ☐ GDPR
- ☐ SOX
- ☐ HIPAA
- ☐ CCPA
- ☐ Other

Detailed Security Risk Assessment Summary

Write something...

Last Security Audit Date

Enter date...

Change Approved by Security Team?

- ☐ Yes
- ☐ No
- ☐ Pending

Supporting Security Documentation (e.g., Risk Assessment Report)

 Upload File

Security Team Reviewer Signature

Write something...