



ERP Cloud Migration Checklist

Planning & Assessment

Initial assessment of current ERP system and readiness for cloud migration.

Current ERP System Overview

Write something...

Number of Users

Enter a number...

Project Start Date

Enter date...

Cloud Provider Selection (if applicable)

- ☐ AWS
- ☐ Azure
- ☐ Google Cloud
- ☐ Other

Key Business Drivers for Cloud Migration

Write something...

Potential Risks & Challenges

- ☐ Data Security
- ☐ Integration Issues
- ☐ User Adoption
- ☐ Cost Overruns
- ☐ Vendor Lock-in

Estimated Go-Live Date

Enter date...

Data Assessment & Cleansing

Evaluation and preparation of data for seamless transfer to the cloud.

Total Data Volume (GB)

Enter a number...

Description of Data Quality Concerns

Write something...

Data Format Standardization Required?

- ☐ Yes
- ☐ No

Data Quality Issues Detected (Select all that apply)

- ☐ Duplicate Records
- ☐ Missing Values
- ☐ Inaccurate Data
- ☐ Inconsistent Formatting
- ☐ Outdated Information

Last Data Cleansing Date

Enter date...

Sample Data Extract (for assessment)

 Upload File

Security & Compliance

Ensuring cloud environment meets security and regulatory requirements.

Compliance Framework(s) Adhered To

- ☐ GDPR
- ☐ CCPA
- ☐ HIPAA
- ☐ ISO 27001
- ☐ SOC 2

Data Encryption Methods Used

- ☐ At Rest
- ☐ In Transit
- ☐ Field Level Encryption

Number of Active User Accounts

Enter a number...

Last Security Audit Date

Enter date...

Description of Access Control Policies

Write something...

Upload Security Policy Document

 Upload File

Infrastructure & Network

Reviewing network connectivity and infrastructure readiness for cloud deployment.

Current Bandwidth (Mbps)

Enter a number...

Estimated Bandwidth Required (Mbps)

Enter a number...

Network Security Configuration

- ☐ Firewall
- ☐ VPN
- ☐ IDS/IPS
- ☐ Cloud-Native Security

Cloud Region Selection

- ☐ Region 1
- ☐ Region 2
- ☐ Region 3

Scheduled Downtime for Migration

Enter date...

Detailed Network Diagram Description

Write something...

Application & Integration

Planning and testing application functionality and integrations within the cloud environment.

Describe existing integrations with other systems (e.g., CRM, e-commerce).

Write something...

Which integrations need to be migrated to the cloud?

- ☐ CRM
- ☐ e-commerce
- ☐ Payment Gateway
- ☐ Shipping Provider
- ☐ Other - Specify

Number of custom API calls currently in use.

Enter a number...

Integration Method for Cloud ERP?

- ☐ API
- ☐ Middleware
- ☐ Direct Database Connection

Planned date for initial integration testing.

Enter date...

Describe any anticipated challenges with migrating existing integrations.

Write something...

Data Migration & Validation

Execution of data migration and thorough validation of data integrity.

Number of Records Migrated

Enter a number...

Data Migration Error Log Summary

Write something...

Migration Tool Used

- ☐ Native Tool
- ☐ Third-Party Tool - Specify in Long Text
- ☐ Custom Script

Data Migration Start Date

Enter date...

Data Migration End Date

Enter date...

Percentage of Data Validation Pass Rate

Enter a number...

Description of Data Validation Methodology

Write something...

Sample Data Validation Report

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User Training & Adoption

Preparing users for the new cloud-based ERP system through training and support.

Number of Users Requiring Training

Enter a number...

First Training Session Date

Enter date...

Training Delivery Methods

- ☐ Live Online
- ☐ Self-Paced Online
- ☐ Instructor-Led (In-Person)

Training Content Outline (Summary)

Write something...

Training Material Format

- ☐ PDF
- ☐ Video
- ☐ Interactive Tutorial

Average Training Session Duration (Hours)

Enter a number...

Post-Training Support Resources

Write something...

Testing & Go-Live Readiness

Comprehensive testing and final preparations before the ERP system goes live in the cloud.

Critical Path Testing Completion (%)

Enter a number...

Regression Test Suites Executed

- ☐ Functional
- ☐ Integration
- ☐ Security
- ☐ Performance

Final User Acceptance Testing (UAT) Sign-Off Date

Enter date...


Summary of Key Testing Findings and Resolutions

Write something...

Go-Live Approval Status

- ☐ Pending
- ☐ Approved
- ☐ Rejected

Final Go-Live Checklist Verification Document

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Planned Go-Live Start Time

Enter time...

Post-Migration Support & Optimization

Ongoing support and optimization of the ERP system in the cloud environment.

Average System Response Time (seconds)

Enter a number...

User Feedback Summary (initial period)

Write something...

Overall System Stability (post-migration)

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Needs Improvement

Date of First Performance Review

Enter date...

Areas for Potential Optimization

- ☐ Reporting
- ☐ Integration
- ☐ User Interface
- ☐ Security

Summary of Identified Performance Bottlenecks

Write something...

Disaster Recovery & Business Continuity

Planning and testing disaster recovery and business continuity strategies for the cloud-based ERP.

Recovery Time Objective (RTO) - Hours

Enter a number...

Recovery Point Objective (RPO) - Hours

Enter a number...

Last DR Drill Date

Enter date...

DR Site Location

- ☐ On-Premise
- ☐ Cloud-Based
- ☐ Hybrid

Detailed DR Procedure Documentation Location

Write something...

Critical Systems to be Recovered First

- ☐ Finance
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Sales & CRM

DR Plan Backup

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