✅ ChecklistGuro

ERP Data Migration Checklist

Planning & Scope Definition

Initial assessment, data scope, and migration strategy definition.

Project Objectives for Data Migration

Write something...

Estimated Number of Records to Migrate

Enter a number...

Data Migration Approach (Big Bang vs. Phased)

☐ Big Bang

☐ Phased

Target Data Migration Start Date

Enter date...

Target Data Migration Completion Date

Enter date...

Source Systems to be Migrated

☐ System A

☐ System B

☐ System C

Data Security & Compliance Requirements

Write something...

Data Profiling & Cleansing

Analyzing source data quality, identifying inconsistencies, and establishing cleansing rules.

Describe the overall data quality assessment methodology.

Write something...

Total records in source system (approximate).

Enter a number...

Percentage of records flagged for potential cleansing.

Enter a number...

Identify and describe the top 3 data quality issues encountered.

Write something...

Select data fields requiring cleansing.

- [ ] Customer Name
- [ ] Customer Address
- [ ] Product Code
- [ ] Order Date
- [ ] Currency Code

Describe the cleansing rules applied to each selected field.

Write something...

Upload sample data file for review and validation.

⬆ Upload File

Data Mapping & Transformation

Defining mappings between source and target data fields, and outlining transformation logic.

Source Field Name

Write something...

Target Field Name

Write something...

Data Transformation Logic

Write something...

Data Length/Precision

Enter a number...

Data Type Conversion Required?

☐ Yes

☐ No

Transformation Functions Applied (Select all that apply)

☐ String Concatenation

☐ Date Formatting

☐ Numeric Rounding

☐ Case Conversion

Transformation Logic Last Updated

Enter date...

ETL Development & Testing

Building and testing the Extract, Transform, Load (ETL) processes.

Describe ETL Process Logic

Write something...

Estimated Record Count (Source)

Enter a number...

Estimated Record Count (Target)

Enter a number...

ETL Development Start Date

Enter date...

ETL Testing Start Date

Enter date...

Number of Failed Records (Initial Test)

Enter a number...

Data Transformation Rules Applied

☐ Data Type Conversion

☐ String Manipulation

☐ Date Formatting

☐ Lookup Table Integration

ETL Script/Code Repository Link

⬆ Upload File

Data Validation & Reconciliation

Verifying data accuracy and completeness after migration.

Total Records Migrated

Enter a number...

Records with Errors

Enter a number...

Records Reconciled Successfully

Enter a number...

Summary of Reconciliation Findings

Write something...

Data Accuracy Validation Status

☐ Pass

☐ Fail

☐ Partial

Completeness Validation Status

☐ Pass

☐ Fail

☐ Partial

Validation Completion Date

Enter date...

Specific Error Details (if applicable)

Write something...

User Acceptance Testing (UAT)

Business users validate data and processes within the new ERP system.

Data Accuracy Verification: Master Data (Customers, Vendors)

☐ Accurate

☐ Minor Discrepancies

☐ Significant Errors

Data Accuracy Verification: Transactional Data (Orders, Invoices)

- [ ] Accurate
- [ ] Minor Discrepancies
- [ ] Significant Errors

Describe any data discrepancies found.

Write something...

Number of records verified in [Specific Module].

Enter a number...

Process Functionality: Order Processing Workflow

- [ ] Working as expected
- [ ] Minor issues
- [ ] Major issues

Date of UAT Execution

Enter date...

UAT Tester Signature

Cutover Planning & Execution

Preparing for and executing the data migration cutover to the live ERP environment.

Planned Cutover Start Date

Enter date...

Planned Cutover Start Time

Enter time...

Estimated Downtime (hours)

Enter a number...

Detailed Cutover Plan Description

Write something...

Cutover Checklist Document

⬆ Upload File

Cutover Lead

☐ John Doe

☐ Jane Smith

☐ David Lee

Communication Channels for Cutover Updates

☐ Email

☐ Slack

☐ Phone Call

Post-Migration Monitoring & Support

Ongoing monitoring and issue resolution after the data migration is complete.

Last Data Verification Date

Enter date...

Number of Data Errors Identified Post-Migration

Enter a number...

Description of Data Errors Found

Write something...

Data Quality Overall Assessment

☐ Excellent

☐ Good

☐ Fair

☐ Poor

Date of Next Scheduled Data Audit

Enter date...

Summary of User Feedback Regarding Data Accuracy

Write something...

Data Migration Issue Resolution Status

☐ Open

☐ In Progress

☐ Resolved

☐ Closed