



ERP Go-Live Readiness Checklist

Project Scope & Planning

Verify project scope alignment, timelines, and resource allocation.

Project Name

Project Budget

Project Start Date

Projected Go-Live Date

Project Methodology (e.g., Agile, Waterfall)

- ☐ Agile
- ☐ Waterfall
- ☐ Hybrid

Summary of Project Goals & Objectives

Write something...

ERP Module Implementation Scope

- ☐ Finance
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Human Resources

Project Charter Document

 Upload File

Data Migration & Validation

Confirm data cleansing, transformation, and successful migration to the new ERP system.

Number of Records Migrated

Enter a number...

Data Cleansing Procedures Performed

Write something...

Data Mapping Validation Status

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

Sample Data Migration File

 Upload File

Number of Data Errors Identified

Enter a number...

Description of Data Transformation Rules

Write something...

Data Validation Rule Coverage

- ☐ Full
- ☐ Partial
- ☐ Minimal

System Configuration & Customization

Ensure accurate system configuration, customization, and integration with other systems.

Customization Requirements Documentation

Write something...

Number of Custom Fields Created

Enter a number...

Module Configuration Status (e.g., Complete, In Progress, Not Started)

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

Custom Report Requirements Fulfilled?

- ☐ Yes
- ☐ No
- ☐ Pending

Date of Last Configuration Review

Enter date...

Details of Data Transformation Rules

Write something...

Security & Access Control

Validate user roles, permissions, and data security protocols are appropriately configured.

User Role Assignment Verification

- ☐ Complete
- ☐ In Progress
- ☐ Not Started

Sensitive Data Fields Encryption

- ☐ Customer Data
- ☐ Financial Data
- ☐ Employee Data
- ☐ Inventory Data

Two-Factor Authentication Enabled?

- ☐ Yes
- ☐ No
- ☐ Partial Implementation

Number of Users with Admin Privileges

Enter a number...

Description of Access Control Procedures

Write something...

Audit Log Review Process Defined?

- ☐ Yes
- ☐ No
- ☐ Partial

Access Control Matrix Document

 Upload File

Testing & Training

Confirm thorough testing across all modules and sufficient user training completion.

Number of Users Trained

Enter a number...

Training Modules Completed (Select All)

- ☐ Finance
- ☐ Inventory Management
- ☐ Sales & CRM
- ☐ Manufacturing
- ☐ HR & Payroll

Last Training Session Date

Enter date...

Summary of User Feedback from Training

Write something...

Training Effectiveness Rating (1-5, 5 being excellent)

☐ 1


☐ 2

☐ 3

☐ 4

☐ 5

Training Materials Upload (Optional)

 Upload File

Cutover Planning & Execution

Review cutover plan, backup procedures, and rollback strategy.

Planned Go-Live Date

Enter date...

Scheduled Cutover Start Time

Enter time...

Detailed Cutover Plan Outline

Write something...

Estimated Downtime (hours)

Enter a number...

Systems to be Decommissioned

- ☐ Legacy System A
- ☐ Legacy System B
- ☐ Legacy System C

Cutover Plan Document

 Upload File

Rollback Contact Person

Write something...

Rollback Procedure Details

Write something...

Post-Go-Live Support & Monitoring

Establish support processes, monitor system performance, and plan for ongoing optimization.

Go-Live Date Confirmation

Enter date...

Critical Incident Volume (First 7 Days)

Enter a number...

Summary of Major Post-Go-Live Issues

Write something...

Modules Requiring Additional Support

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

Average Issue Resolution Time (Hours)

Enter time...

User Satisfaction Survey Completed?

- ☐ Yes
- ☐ No
- ☐ In Progress

Notes on System Performance and Stability

Write something...

Business Process Validation

Confirm critical business processes function correctly within the new ERP system.

Validate Order Fulfillment Process

- ☐ Order Entry
- ☐ Inventory Allocation
- ☐ Shipping
- ☐ Invoice Generation

Number of Test Transactions Executed (Order to Cash)

Enter a number...

Observed Discrepancies in Invoice Processing (if any)

Write something...

Payment Processing Validation - Successful?

- ☐ Yes
- ☐ No
- ☐ Partial

Date of Last Business Process Validation Test

Enter date...

Describe any issues encountered during inventory management testing.

Write something...

Hardware & Infrastructure

Verify hardware, network, and server infrastructure are ready to support the ERP system.

Server CPU Cores

Enter a number...

Server RAM (GB)

Enter a number...

Disk Space Allocated (TB)

Enter a number...

Network Bandwidth

- ☐ 1 Gbps
- ☐ 10 Gbps
- ☐ 100 Mbps
- ☐ Other

Hardware Warranty Expiration Date

Enter date...

Details on Network Configuration

Write something...

Disaster Recovery Plan Status

- ☐ Completed
- ☐ In Progress
- ☐ Not Started

Documentation & Knowledge Transfer

Ensure adequate documentation and knowledge transfer to support users post-go-live.

Summary of Key User Manuals Created

Write something...

Link to User Training Videos

 Upload File

Training Modules Completed by Key Users

- ☐ Module 1: System Navigation
- ☐ Module 2: Data Entry
- ☐ Module 2: Reporting
- ☐ Module 3: Workflow Management

Number of Users Trained

Enter a number...

Date of Final Documentation Review

Enter date...

Description of Knowledge Transfer Plan

Write something...