



ERP Legacy System Integration Checklist

Legacy System Assessment

Evaluate the existing legacy system's architecture, data structures, and dependencies.

System Overview Description

Write something...

Approximate Record Count

Enter a number...

Primary Business Functions Supported

- ☐ Finance
- ☐ Inventory
- ☐ Order Management
- ☐ Manufacturing
- ☐ Customer Relationship Management (CRM)

Last System Upgrade Date

Enter date...

Known System Limitations

Write something...

Database Type

- ☐ Oracle
- ☐ SQL Server
- ☐ MySQL
- ☐ DB2
- ☐ Other

Data Mapping & Transformation

Define how data will be mapped and transformed between the legacy system and the ERP.

Data Transformation Method

- ☐ Direct Mapping
- ☐ ETL Process
- ☐ Custom Script

Record Count for Initial Load

Enter a number...

Description of Data Transformation Rules

Write something...

Default Value Handling

- ☐ Use Legacy System Default
- ☐ Use ERP Default
- ☐ Specify Custom Default

Data Mapping Spreadsheet (if applicable)

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Interface Design & Development

Design and develop the interfaces (APIs, middleware) for data exchange.

API Endpoint Description

Write something...


Data Transfer Frequency (in minutes)

Enter a number...

Data Transfer Protocol

- ☐ REST API
- ☐ SOAP
- ☐ File Transfer (FTP/SFTP)
- ☐ Message Queue (e.g., RabbitMQ)

Sample Data Payload (Legacy System)

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Error Handling Mechanism Description

Write something...

Maximum Payload Size (in MB)

Enter a number...

Security Considerations

Implement robust security measures to protect data during transfer and storage.

Encryption Key Length (bits)

Enter a number...

Authentication Methods Enabled

- ☐ Username/Password
- ☐ Multi-Factor Authentication (MFA)
- ☐ Single Sign-On (SSO)
- ☐ Biometrics

Data Transmission Protocol

- ☐ HTTPS
- ☐ SFTP
- ☐ FTPS


Detailed Security Assessment Findings

Write something...

Access Control Model

- ☐ Role-Based Access Control (RBAC)
- ☐ Attribute-Based Access Control (ABAC)

Security Policy Document

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Data Validation & Cleansing

Establish procedures for data validation and cleansing to ensure data accuracy.

Record Count Validation: Expected Number

Enter a number...

Record Count Validation: Actual Number

Enter a number...

Data Type Verification: Confirm Correct Data Type

☐ Yes

☐ No

Data Anomaly Notes (if any)

Write something...

Null Value Check: Validated Nulls

☐ Yes

☐ No

Duplicate Record Count

Enter a number...

Date Format Validation Date

Enter date...

Testing & User Acceptance

Conduct thorough testing and obtain user acceptance for the integrated system.

Number of Test Cases Executed

Enter a number...

Number of Test Cases Passed

Enter a number...

Number of Test Cases Failed

Enter a number...

Summary of Critical Errors Found

Write something...

Areas Tested (e.g., Order Processing, Inventory Management)

- ☐ Order Processing
- ☐ Inventory Management
- ☐ Financial Reporting
- ☐ Customer Relationship Management
- ☐ Production Planning

Date of User Acceptance Testing Start

Enter date...

Date of User Acceptance Testing End

Enter date...

User Acceptance Sign-off

Cutover Planning & Execution

Develop a detailed cutover plan and execute the transition to the ERP system.

Planned Cutover Date

Planned Cutover Start Time

Estimated Downtime (in hours)

Detailed Cutover Steps

Cutover Runbook

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Cutover Lead

- ☐ Team A
- ☐ Team B
- ☐ Team C

Dry Run Date

Enter date...

Rollback Plan Details

Write something...

Post-Implementation Support

Provide ongoing support and maintenance for the integrated system.

Number of Support Tickets Received

Enter a number...

Average Ticket Resolution Time (Hours)

Enter a number...

Overall User Satisfaction (Post-Go-Live)

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Date of Last Major Support Issue

Enter date...

Summary of Key Support Challenges Encountered

Write something...

Areas Requiring Further Training/Documentation

- ☐ Module A
- ☐ Module B
- ☐ Reporting
- ☐ Integrations


Documentation & Training

Document the integration process and provide training to users.

Integration Design Documentation Summary

Write something...

Integration Process Flow Diagrams

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User Training Manual Content Outline

Write something...

Training Modules Covered

- ☐ Data Migration
- ☐ System Navigation
- ☐ Reporting
- ☐ Security Protocols

Number of Users Trained

Enter a number...

Date of Last Documentation Update

Enter date...

Decommissioning Legacy System

Plan and execute the decommissioning of the legacy system after successful integration.

Planned Decommission Date

Enter date...

Rationale for Decommissioning

Write something...

Data Volume in Legacy System (GB)

Enter a number...

Data Retention Requirements

- ☐ Archived for 7 years
- ☐ Archived for 10 years
- ☐ No archival needed
- ☐ Other (Specify)

Data Archival Method (if applicable)

Write something...

Data Archival Verification Report

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Responsible Team for Decommissioning

- ☐ IT Operations
- ☐ Application Support
- ☐ Data Governance

Confirmation of Data Sanitization