



# ERP Master Data Governance Checklist

## Data Ownership & Stewardship

Defines roles and responsibilities for data creation, maintenance, and quality.

### Data Owner(s) for Customer Data

- ☐ Marketing Department
- ☐ Sales Department
- ☐ Customer Service
- ☐ Finance Department

### Data Steward(s) for Product Data

- ☐ Procurement
- ☐ Engineering
- ☐ Manufacturing

### Description of Data Owner Responsibilities

Write something...

### Description of Data Steward Responsibilities

Write something...

### Date of Data Ownership Assignment

Enter date...

### Contact Information for Primary Data Owner

Write something...

### Approval Authority for Data Ownership Changes

- ☐ CIO
- ☐ CFO
- ☐ Head of Operations

## Data Standards & Definitions

Ensures consistent data formats, naming conventions, and definitions across the ERP system.

### Standard Item Code Format

Write something...

### Maximum Length for Item Code

Enter a number...

### Standard Unit of Measure Abbreviation

Write something...

### Allowed Currencies

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ JPY

### Standard Address Format

Write something...

### Default Time Zone

- ☐ UTC
- ☐ America/New\_York
- ☐ Europe/London

## Data Creation & Modification Rules

Establishes rules and validation checks for adding and updating master data records.

### Maximum Length for Material Description

Enter a number...

### Minimum Quantity Allowed for Inventory

Enter a number...

### Mandatory Fields for Customer Creation

- ☐ Company Name
- ☐ Contact Person
- ☐ Address
- ☐ Phone Number
- ☐ Email Address

### Allowed Character Sets for Product Codes

- ☐ Alphanumeric
- ☐ Numeric
- ☐ Special Characters

### Effective Date for Price Changes

Enter date...

### Detailed Description of Validation Logic

Write something...

## Data Cleansing & Deduplication

Outlines processes for identifying and correcting inaccurate, incomplete, or duplicate data.

### Describe current data cleansing processes in place.

Write something...


### Estimated number of records to be cleansed.

Enter a number...

### Primary method for identifying duplicate records?

- ☐ Exact match on key fields
- ☐ Fuzzy matching algorithms
- ☐ Manual review
- ☐ Combination of methods

### Sample data file for duplicate review (optional)

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### Acceptable level of matching threshold for fuzzy matching (0-100)

Enter a number...

### Which fields are used for identifying duplicates?

- ☐ Customer Name
- ☐ Customer Address
- ☐ Customer Email
- ☐ Product SKU
- ☐ Supplier ID

## Data Security & Access Control

Specifies permissions and safeguards to protect sensitive master data from unauthorized access or modification.

### Role-Based Access Controls Implemented?

- ☐ Yes
- ☐ No
- ☐ In Progress

### Data Segregation Applied to Which Areas?

- ☐ Financials
- ☐ Inventory
- ☐ Customer Data
- ☐ Production
- ☐ HR Data

### Multi-Factor Authentication Enabled?

- ☐ Yes
- ☐ No
- ☐ Planned

### Number of Users with Admin Privileges

### Last Security Audit Performed

### Description of Data Encryption Methods Used

Write something...

## Data Integration & Synchronization

Addresses how master data is synchronized with other systems and data sources.

### Integration Method

- ☐ API
- ☐ Batch File Transfer
- ☐ Real-time
- ☐ Scheduled Synchronization

### Synchronization Frequency (Hours)

Enter a number...

### Last Synchronization Date

Enter date...

### Systems Integrated With ERP

- ☐ CRM
- ☐ eCommerce
- ☐ Legacy Systems
- ☐ Warehouse Management System

## Integration Error Logs Review Notes

Write something...

# Data Change Management

Details the process for requesting, approving, and implementing changes to master data.

## Change Request Description

Write something...

## Data Domain Affected

- ☐ Customer
- ☐ Vendor
- ☐ Product
- ☐ Material
- ☐ Employee

## Proposed Implementation Date

Enter date...

## Impacted Record Count (Estimated)

Enter a number...

### Change Type

- ☐ Correction
- ☐ Enhancement
- ☐ Deletion
- ☐ New Creation

### Requestor Signature

### Date of Request

## Data Audit & Monitoring

Describes procedures for regularly auditing and monitoring master data quality and adherence to governance policies.

### Last Audit Date

### Number of Records Audited

### Number of Errors/Discrepancies Found


### Summary of Audit Findings

Write something...

### Data Quality Issues Identified (Select All)

- ☐ Inaccurate Data
- ☐ Missing Data
- ☐ Duplicate Records
- ☐ Inconsistent Data
- ☐ Data Format Errors

### Supporting Audit Documentation

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### Next Scheduled Audit Date

Enter date...

## Training and Documentation

Ensures users are adequately trained on master data governance policies and procedures, with clear documentation available.

### Training Program Overview Description

Write something...

### Training Modules Covered

- ☐ Data Ownership & Stewardship
- ☐ Data Standards & Definitions
- ☐ Data Cleansing
- ☐ System Navigation
- ☐ Security Procedures

### Last Training Date

Enter date...

### Number of Users Trained

Enter a number...

### Training Materials (e.g., manuals, presentations)

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### Document Version Control

## Exception Handling & Resolution

Defines how to manage and resolve data quality issues and deviations from established policies.

### Detailed Description of the Exception

Write something...

### Exception Category

- ☐ Data Quality
- ☐ System Error
- ☐ Business Rule Violation
- ☐ User Error

### Number of Affected Records

Enter a number...

### Date of Exception Discovery

Enter date...

### Time of Exception Discovery

Enter time...

### Severity Level

- ☐ Critical
- ☐ High
- ☐ Medium
- ☐ Low

### Proposed Resolution Steps

Write something...

**Resolution Status**

- ☐ Open
- ☐ In Progress
- ☐ Resolved
- ☐ Deferred