



ERP System Documentation Checklist

System Overview & Architecture

Documents detailing the ERP system's overall design, components, and integrations.

System Architecture Diagram Description

Write something...

Number of Integrated Systems

Enter a number...

Deployment Type (Cloud/On-Premise/Hybrid)

- ☐ Cloud
- ☐ On-Premise
- ☐ Hybrid

Key Modules Deployed

- ☐ Finance
- ☐ Human Resources
- ☐ Supply Chain Management
- ☐ Manufacturing
- ☐ Sales & Distribution

System Go-Live Date

Enter date...

ERP Vendor

Write something...

Number of Users

Enter a number...

Module Configuration Guides

Step-by-step instructions for configuring each ERP module based on business requirements.

General Ledger Setup Description

Write something...

Chart of Accounts Number Range Start

Enter a number...

Default Currency

☐ USD

☐ EUR

☐ GBP

Inventory Valuation Methods

- ☐ FIFO
- ☐ LIFO
- ☐ Weighted Average

Last Configuration Review Date

Enter date...

Tax Configuration Notes

Write something...

Data Migration Procedures

Detailed processes for migrating data from legacy systems to the ERP, including cleansing and validation.

Data Source Assessment Description

Write something...

Record Count (Source)

Enter a number...

Record Count (Target)

Enter a number...

Data Extraction Start Date

Enter date...

Data Extraction End Date

Enter date...

Data Mapping Document

 Upload File

Data Cleansing Steps Performed

- ☐ Address Formatting
- ☐ Duplicate Record Removal
- ☐ Data Type Conversion

Data Validation Results Description

Write something...

Data Migration Approver

Security & Access Control Policies

Documentation outlining user roles, permissions, and security protocols within the ERP system.

Description of Access Control Policy

Write something...

Authentication Method

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

Restricted Access Levels

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

Maximum Failed Login Attempts

Enter a number...

Last Policy Review Date

Enter date...

Data Encryption Standard

- ☐ AES-256
- ☐ RSA
- ☐ Triple DES

Integration Specifications

Technical specifications and mappings for integrations between the ERP and other systems.

System A Endpoint URL

Write something...

System B Endpoint URL

Write something...

Integration Flow Description

Write something...


Data Transfer Frequency (Hours)

Enter a number...

Data Mapping Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed
- ☐ Blocked

Sample Integration Data File

 Upload File

Last Integration Run Date

Enter date...

User Manuals & Training Materials

Guides and tutorials for end-users to effectively utilize the ERP functionality.

Introduction to the ERP System

Write something...


Module-Specific User Guides (e.g., Finance, HR, Sales)

Write something...

Commonly Used Keyboard Shortcuts

- ☐ Ctrl+C (Copy)
- ☐ Ctrl+V (Paste)
- ☐ Ctrl+S (Save)

Training Videos (Optional)

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Troubleshooting FAQs

Write something...

Estimated Training Time (in hours)

Enter a number...

Date of Last Training Update

Enter date...

User Acknowledgement of Training

Reporting & Analytics Documentation

Details on report creation, data sources, and dashboard configurations.

Report Purpose & Business Context

Write something...

Key Performance Indicators (KPIs) Defined

- ☐ Revenue Growth
- ☐ Customer Satisfaction
- ☐ Operational Efficiency

Sample Report Output (PDF)

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Report Refresh Frequency (Hours)

Enter a number...

Data Sources Used for Reporting

- ☐ CRM
- ☐ Manufacturing
- ☐ Finance
- ☐ Sales

Last Report Validation Date

Enter date...

Data Transformation Rules Documentation

Write something...

Disaster Recovery & Business Continuity Plans

Procedures and backups for system recovery in case of unforeseen events.

Detailed Disaster Recovery Plan Description

Write something...

Last DR Plan Test Date

Enter date...


Estimated System Recovery Time (RTO)

Enter time...

Maximum Acceptable Data Loss (RPO)

Enter a number...

Backup Verification Logs

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Primary Data Center Location

- ☐ On-Premise
- ☐ Cloud Provider A
- ☐ Cloud Provider B

Critical Systems to Recover First

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

Version Control & Change Logs

Tracking system updates, modifications, and impact analysis.

Version Number

Release Date

Summary of Changes

Detailed Change Log

Write something...

Configuration Files

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Affected Modules

- ☐ Finance
- ☐ Inventory
- ☐ Sales
- ☐ HRM

Implementation Date

Enter date...

Impact Assessment

Write something...

Contact Information & Support Procedures

Who to contact for support, troubleshooting, and system-related inquiries.

Primary ERP Support Contact Name

Write something...

Primary ERP Support Email

Write something...

Primary Support Phone Number

Enter a number...

Escalation Path (for urgent issues)

Write something...

Tiered Support Levels (e.g., Tier 1, Tier 2)

- ☐ Tier 1
- ☐ Tier 2
- ☐ Tier 3


Scheduled Support Hours

Enter date...

Specific Incident Reporting Instructions

Write something...

Support Documentation Examples (e.g., ticket templates)

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