ChecklistGuro

ERP Upgrade Readiness Checklist

Planning & Scope Definition

Assess current system state, define upgrade scope, and establish project goals.

Describe Current ERP System Version and Modules in Use

Write something...

Define Business Objectives for the ERP Upgrade

Write something...

Select Upgrade Type (e.g., Full, Partial, Technical)

- [ ] Full Upgrade
- [ ] Partial Upgrade
- [ ] Technical Upgrade

Estimated Number of Users Impacted

Enter a number...

Target Go-Live Date

Enter date...

List of Key Business Processes to be Evaluated

Write something...

Select Modules to be Upgraded

- [ ] Finance
- [ ] Human Resources
- [ ] Supply Chain
- [ ] Manufacturing
- [ ] Sales & Distribution

Compatibility & Dependencies

Verify compatibility of existing integrations, customizations, and third-party applications.

List of Integrated Systems

Write something...

Affected Customizations?

- [ ] Yes
- [ ] No

Integration Method (API, File Transfer, etc.)

- [ ] API
- [ ] File Transfer
- [ ] Database Link
- [ ] Other

Documentation of Custom Integrations (if applicable)

Upload File

Number of Custom Integrations

Enter a number...

Upgrade Path Compatibility Verified?

- [ ] Yes
- [ ] No
- [ ] N/A

Data Assessment & Cleansing

Evaluate data quality, identify potential migration issues, and plan for data cleansing activities.

Total Record Count in Primary Tables

Enter a number...

Percentage of Records with Missing Required Fields

Enter a number...

Description of Data Quality Issues Identified

Write something...

Data Cleansing Tasks Required (Select all that apply)

- [ ] Standardization of Addresses
- [ ] De-duplication of Records
- [ ] Correction of Data Types
- [ ] Validation against External Sources
- [ ] Handling of Special Characters

Estimated Data Cleansing Completion Date

Enter date...

Sample Data File (for Validation)

Upload File

Customization Review & Remediation

Analyze existing customizations, determine impact on upgrade, and plan for necessary modifications or replacements.

Description of Customization

Write something...

Lines of Code Affected (Estimate)

Enter a number...

Customization Compatibility Status

- [ ] Compatible
- [ ] Requires Modification
- [ ] Incompatible - Requires Replacement

Customization Source Code (If Applicable)

Upload File

Detailed Modification/Replacement Plan

Write something...

Estimated Modification/Replacement Completion Date

Enter date...

Impact on Core ERP Functionality

- [ ] No Impact
- [ ] Minor Impact
- [ ] Significant Impact

Testing & Validation

Outline testing phases, including unit, integration, user acceptance, and performance testing.

Number of Test Cases Executed

Enter a number...

Test Environments Used

- [ ] Development
- [ ] QA
- [ ] Staging
- [ ] Production (Limited)

Date of Last Regression Testing

Enter date...

Summary of Key Test Results

Write something...

Number of Critical Defects Found

Enter a number...

Number of High Severity Defects Found

Enter a number...

Overall Test Status

- [ ] Pass
- [ ] Fail
- [ ] Blocked
- [ ] In Progress

Test Execution Reports (if applicable)

Upload File

Training & Communication

Plan for user training and stakeholder communication throughout the upgrade process.

Number of users requiring training

Enter a number...

Training Delivery Methods

- [ ] Online Modules
- [ ] Instructor-Led Sessions
- [ ] Quick Reference Guides
- [ ] Video Tutorials

Training Start Date

Enter date...

Training End Date

Enter date...

Training Materials Prepared

Write something...

Communication Plan Description

Write something...

Stakeholder Communication Frequency

- [ ] Daily
- [ ] Weekly
- [ ] Bi-Weekly

Training Materials (Documents, Presentations)

Upload File

Infrastructure Readiness

Ensure infrastructure capacity and stability to support the upgraded ERP system.

Current Server CPU Utilization (%)

Enter a number...

Projected Server CPU Utilization (%) Post-Upgrade

Enter a number...

Current Server RAM (GB)

Enter a number...

Projected Server RAM (GB) Post-Upgrade

Enter a number...

Current Database Size (GB)

Enter a number...

Projected Database Size (GB) Post-Upgrade

Enter a number...

Operating System Compatibility

- [ ] Compatible
- [ ] Needs Update
- [ ] Incompatible

Network Bandwidth Sufficiency

- [ ] Sufficient
- [ ] Needs Assessment
- [ ] Insufficient

Rollback Plan

Define a detailed rollback plan in case of unforeseen issues during or after the upgrade.

Detailed Rollback Trigger Criteria

Write something...

Step-by-Step Rollback Procedure

Write something...

Estimated Rollback Downtime (Hours)

Enter a number...

Planned Rollback Start Date (if applicable)

Enter date...

Estimated Rollback Start Time

Enter time...

Designated Rollback Coordinator

- [ ] Team Member 1
- [ ] Team Member 2
- [ ] Team Member 3

Rollback Plan Approval Signature

Post-Upgrade Monitoring & Support

Establish monitoring procedures and support resources for the post-upgrade period.

System Response Time (Average)

Enter a number...

Error Rate (%)

Enter a number...

Key Business Processes Impacted (if any)

- [ ] Order Management
- [ ] Inventory Control
- [ ] Financial Reporting
- [ ] Production Planning
- [ ] Customer Relationship Management

Summary of Post-Upgrade Issues Encountered

Write something...

Date of First Post-Upgrade Monitoring Review

Enter date...

Overall Upgrade Success (Subjective)

- [ ] Excellent
- [ ] Good
- [ ] Fair
- [ ] Poor

Recommendations for Future Upgrades

Write something...