



# 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)

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# 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)

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### 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

### Test Environments Used

- ☐ Development
- ☐ QA
- ☐ Staging
- ☐ Production (Limited)

### Date of Last Regression Testing

### Summary of Key Test Results

### 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)

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## 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...