



ERP Version Control Checklist

Version Control Strategy

Defines the overall approach to managing ERP versions and updates.

Describe the overall version control philosophy (e.g., branching strategy, tagging conventions).

Write something...

Primary Version Control System Used:

- ☐ Git
- ☐ SVN
- ☐ Other (Specify)

Maximum Number of Concurrent Branches Allowed:

Enter a number...

Types of Changes Requiring Formal Version Control:

- ☐ Code Modifications
- ☐ Configuration Changes
- ☐ Database Schema Changes
- ☐ Integration Updates

Date of Last Version Control Strategy Review:

Enter date...

Documentation of Current Version

Ensures a clear record of the current ERP version, including build numbers, patch levels, and customizations.

ERP System Version Number

Enter a number...

Build Number

Enter a number...

Patch Level Details (if applicable)

Write something...

Release Notes Summary

Write something...

Date of Current Version Implementation

Enter date...

Description of Major Customizations in this Version

Write something...

Configuration File Backup (Optional)

 Upload File

Change Request Process

Outlines the procedures for submitting, approving, and implementing changes to the ERP system.

Change Request Description

Write something...

Change Priority

☐ High

☐ Medium

☐ Low

Estimated Effort (Hours)

Enter a number...

Request Date

Enter date...

Impacted Module(s)

- ☐ Finance
- ☐ Supply Chain
- ☐ Human Resources
- ☐ Manufacturing
- ☐ Sales

Related Documents

- ☐ Design Document
- ☐ Test Plan
- ☐ User Manual

Approval Deadline

Enter date...

Backup and Recovery Procedures

Details the steps for backing up the ERP system and restoring it in case of failures or errors.

Backup Frequency (Days)

Enter a number...

Last Successful Full Backup Date

Enter date...

Scheduled Backup Start Time

Enter time...

Backup Location Description (e.g., offsite storage)

Write something...

Copy of Latest Backup Configuration File

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Retention Period (Days)

Enter a number...

Recovery Point Objective (RPO)

Write something...

Recovery Time Objective (RTO)

Write something...

Customization Tracking

Maintains a record of all customizations made to the ERP system, including code, configuration changes, and integration points.

Description of Customization

Write something...

Customization ID

Enter a number...

Date of Implementation

Enter date...

Developer Responsible

- ☐ Developer 1
- ☐ Developer 2
- ☐ Developer 3

Customization Code File

 Upload File

Reason for Customization

Write something...

Module Affected

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

Upgrade Planning & Testing

Covers the steps involved in planning, testing, and implementing upgrades to new ERP versions.

Planned Upgrade Start Date

Enter date...

Estimated Upgrade Duration (in hours)

Enter a number...

Upgrade Method

- ☐ Automated Upgrade
- ☐ Manual Upgrade
- ☐ Phased Upgrade


Upgrade Scope & Objectives

Write something...

Affected Modules

- ☐ Finance
- ☐ Human Resources
- ☐ Supply Chain
- ☐ Manufacturing
- ☐ Sales & Marketing

Pre-Upgrade System Backup

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Planned Go-Live Date

Enter date...

Rollback Procedures

Defines the steps to revert to a previous ERP version in case of problems with an upgrade or implementation.

Detailed Rollback Plan Narrative

Write something...

Scheduled Rollback Start Date

Enter date...

Estimated Rollback Start Time

Enter time...

Estimated Rollback Duration (hours)

Enter a number...


Rollback Lead Contact

- ☐ Contact 1
- ☐ Contact 2
- ☐ Contact 2

Data Integrity Verification Steps After Rollback

Write something...

Pre-Rollback System Backup (Confirmation)

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Environment Management

Covers the management of different ERP environments (development, testing, production).

Number of Development Environments

Enter a number...

Number of Testing Environments

Enter a number...

Number of Production Environments

Enter a number...

Environment Access Control Method

- ☐ Role-Based Access
- ☐ Individual Permissions
- ☐ Combination

Last Environment Health Check Date

Enter date...

Description of Environment Naming Convention

Write something...

Environment Monitoring Tools Used

- ☐ CPU Usage Monitoring
- ☐ Memory Usage Monitoring
- ☐ Disk Space Monitoring
- ☐ Network Latency Monitoring

Environment Configuration Documentation

 Upload File

Code Repository Management

Details the process for storing and managing code related to ERP customizations.

Repository URL

Write something...

Repository Branch Size Limit (MB)

Enter a number...

Allowed Branch Types (e.g., Feature, Release, Hotfix)

- ☐ Feature
- ☐ Release
- ☐ Hotfix
- ☐ Bugfix

Repository Access Control Policy

Write something...

Last Repository Audit Date

Enter date...

Repository Contribution Guidelines

Write something...

Version Control System Usage

Ensures consistent use of the chosen version control system (e.g., Git).

Version Control System in Use

- ☐ Git
- ☐ SVN
- ☐ Other (Specify in Long Text)

Repository URL

Write something...

Branching Strategy Number of Allowed Branches

Enter a number...

Workflow Stages Requiring Version Control

- ☐ Development
- ☐ Testing
- ☐ Production

Naming Conventions for Branches/Tags

Write something...

Last Code Review Date

Enter date...