✅ ChecklistGuro

WMS System Upgrade Checklist

Pre-Upgrade Planning

Tasks related to planning and preparing for the WMS upgrade.

Current WMS Version

Enter a number...

New WMS Version

Write something...

Planned Upgrade Start Date

Enter date...

Planned Upgrade End Date

Enter date...

Upgrade Scope & Objectives

Write something...

Affected Modules/Areas

- ☐ Receiving
- ☐ Putaway
- ☐ Picking
- ☐ Packing
- ☐ Shipping
- ☐ Inventory Management
- ☐ Reporting

Upgrade Type

- ☐ Minor Version Upgrade
- ☐ Major Version Upgrade
- ☐ Custom Upgrade

Data Backup & Validation

Ensuring data is backed up and validation processes are in place.

Last Backup Date

Enter date...

Backup Size (GB)

Enter a number...

Backup Type

- ☐ Full
- ☐ Differential
- ☐ Incremental

Backup Verification File (if applicable)

⬆ Upload File

Backup Verification Notes

Write something...

Data Validation Method

☐ Record Count Comparison

☐ Data Integrity Check

☐ Sample Data Validation

Record Count Mismatch Threshold (if applicable)

Enter a number...

Environment Preparation

Setting up the test and production environments for the upgrade.

Server RAM (GB)

Enter a number...

Server CPU Cores

Enter a number...

Operating System

☐ Windows Server
☐ Linux
☐ Other

Detailed Environment Configuration Notes

Write something...

Environment Build Completion Date

Enter date...

Environment Configuration Document

⬆ Upload File

Software Installation & Configuration

Installing and configuring the new WMS version.

Installation Notes

Write something...

New System Version

Enter a number...

Installation Log File

⬆ Upload File

Database Configuration Method

☐ Automated

☐ Manual

Installation Completion Date

Enter date...

Configuration Parameter Adjustments

Write something...

Integration Testing

Verifying integrations with other systems after the upgrade.

ERP System Integration Status

☐ Functional

☐ Needs Review

☐ Broken

Order Management System (OMS) Integration Status

☐ Functional

☐ Needs Review

☐ Broken

Order Synchronization Latency (seconds)

Enter a number...

Description of Integration Errors (if any)

Write something...

Shipping Carrier Integration Status

☐ Functional

☐ Needs Review

☐ Broken

Last Successful Data Synchronization Date

Enter date...

Integration Logs

⬆ Upload File

User Acceptance Testing (UAT)

Allowing users to test the upgraded system and provide feedback.

UAT Tester Signature

Date of UAT Execution

Enter date...

Overall System Performance

☐ Excellent

☐ Good

☐ Fair

☐ Poor

Specific Functionality Tested (e.g., Receiving, Picking)

Write something...

Number of Transactions Tested

Enter a number...

Integration with ERP System

☐ Functional

☐ Partially Functional

☐ Not Functional

Any Issues Encountered? (Describe in detail)

Write something...

Cutover Planning & Execution

Details for the transition from the old system to the upgraded version.

Planned Cutover Date

Enter date...

Planned Cutover Start Time

Enter time...

Detailed Cutover Steps

Write something...

Estimated Downtime (in hours)

Enter a number...

Cutover Approach (Big Bang or Phased)

☐ Big Bang

☐ Phased

Cutover Runbook

⬆ Upload File

Rollback Plan (if needed)

Write something...

Communication Plan

☐ Email
☐ Slack
☐ Phone Call

Post-Upgrade Monitoring & Stabilization

Monitoring the system's performance and stability after the upgrade.

System CPU Utilization (%)

Enter a number...

Database Query Response Time (ms)

Enter a number...

Peak Concurrent Users

Enter a number...

System Error Logs Review Summary

Write something...

First Post-Upgrade Monitoring Date

Enter date...

Time of Peak Usage Observed

Enter time...

Overall System Stability Assessment

☐ Excellent

☐ Good

☐ Fair

☐ Needs Improvement

Documentation & Training

Updating documentation and providing training on the new system.

Update Existing WMS User Manuals

Write something...

New Training Materials (Videos, PDFs)

⬆ Upload File

Training Delivery Methods

☐ In-Person

☐ Online Webinar

☐ Recorded Training

☐ Self-Paced Modules

Number of Users Trained

Enter a number...

Training Completion Deadline

Enter date...

Documentation Review & Approval