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✅ ERP Documentation Checklist

📁 1. Pre-Implementation Documents

Document	Description
Software Requirements Specification (SRS)	Technical and functional blueprint for the ERP system.
Business Process Document (BPD)	Maps current and future business processes; aligns ERP with organizational workflows.
Non-Disclosure Agreement (NDA)	Legal protection for sensitive data and IP.
Project Charter	Authorizes the project, outlines objectives, scope, stakeholders, and budget.
Stakeholder Register	Identifies all key stakeholders with roles, contact info, and influence levels.
Gap-Fit Analysis Report	Compares ERP features with business needs; identifies customization requirements.
Request for Proposal (RFP)	Formal invitation to vendors for bids; includes requirements and evaluation criteria.
Vendor Evaluation & Selection Report	Documents the rationale behind vendor selection.
Initial Risk Assessment	Identifies potential risks and their mitigation strategies.
Data Migration Plan (Initial Draft)	Overview of source data, data mapping, and tools needed for migration.
Budget & Cost Estimation Sheet	Detailed forecast of project expenses, including licensing, consulting, and hardware.

🛠️ 2. Implementation Phase Documents

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Document	Description
Project Log	Master tracker for activities, milestones, and progress.
Change Request Log	Logs all change requests, approvals, impacts, and notes.
Technical Documentation	Code structure, customizations, APIs, database schema, and integrations.
Configuration Documentation	Details on module settings, workflows, user roles, etc.
Security & Access Control Matrix	Role-based access definition to ensure proper permissions.
Environment Setup Documents	Hardware/software environment setup across DEV, QA, UAT, and PROD.
Data Migration Plan (Final Version)	Approved plan with mapping, cleansing, tools, and schedule.
Master Data Templates	Predefined formats for importing customer, vendor, product, and chart of accounts data.
UAT (User Acceptance Testing) Reports	Summary of testing by end-users and resolution of defects.
Test Cases & Scripts	Step-by-step testing procedures with expected and actual results.
Interface & Integration Test Reports	Documents success/failure of ERP integrations (e.g., with payroll, CRM, etc.).
Issue & Bug Tracker	Tracks reported issues, status, resolution date, and responsible parties.
Compliance Checklists	Validation of industry-specific or regional legal and tax requirements.

📚 3. Training & Go-Live Documents

Document	Description
Training Sheet	Who was trained, when, on what module, and training status.

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Standard Operating Procedures (SOPs)	Step-by-step guides for common tasks by department/role.
Help Files	In-app or downloadable text-based guides.
Help Videos	Visual walk-throughs for end-user support.
Training Feedback Forms	Collects feedback on training sessions for improvements.
User Manuals	Detailed module-wise reference for end users.
Role Mapping Document	Maps each ERP function to users or roles.
Cutover Plan	Activities for transitioning from old system to ERP before go-live.
Go-Live Checklist	Final validation: data integrity, access control, training, backups, etc.

📑 4. Post-Implementation Documents

Document	Description
Snag List (Post-Go-Live Issues Log)	Prioritized bug/fix list with resolution owners and deadlines.
Backup & Restore Policy	Clear instructions and frequency for data backups and disaster recovery.
System Audit Logs & Reports	Monitors access, transactions, and exceptions post go-live.
Performance Monitoring Reports	Tracks ERP performance (speed, uptime, errors) over time.
Support SLA Agreement	Defines response time, escalation levels, and support responsibilities.
Change Management Log	Record of any changes to SOPs or configurations post go-live.
Final Risk Assessment	Identifies any new risks post-launch and ongoing mitigation strategies.

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Post-Go-Live Review Report   Summarizes what went well, lessons learned, and further improvements.

Continuous Improvement Plan   Suggestions for future process optimizations or module additions.

Annual Review & Upgrade Roadmap   Plan for periodic reviews, patches, upgrades, or expansions.