ERP Data Migration Plan

This document outlines the strategy, phases, and ownership required for migrating critical business data from legacy systems into the new ERP.

1. Data Migration Phases Overview

The migration process is typically iterative, involving multiple cycles of extraction, transformation, and loading (ETL).

Phase	Description	Key Deliverable	Owner	Target Date
P1: Discovery and Scoping	Identify all required data objects, define data migration scope (what is in, what is out), and map current state (AS-IS) fields to future state (TO-BE) fields in the new ERP	Master Data Field Mapping Document	Project Manager, System Integrator	Week 8
P2: Cleansing and Preparation (Source)	Business owners clean, de-duplicate, and standardize legacy data in preparation for extraction. Data ownership is assigned	Cleansed Data Sign-off by Business Leads	Business Process Owners	Week 12
P3: Build and Testing (Technical)	Develop ETL scripts/tools and build data validation routines. Conduct unit and integration testing of the data load processes	Successful Mock Load #1 (IT)	IT/Technical Team, System Integrator	Week 16
P4: Mock Loads and Reconciliation	Perform full-volume mock data loads in a test environment. Business users validate data integrity, completeness, and accuracy. Multiple cycles (Mock 1, 2, 3) are typically required	Data Reconciliation Reports (per Mock Load)	Business Analysts, Key Users	Week 20-28
P5: Cutover and Go-Live	The final production data migration. Involves freezing data entry in legacy systems, running the final load, and reconciling production data	Go/No-Go Decision based on Data Readiness	Executive Sponsor	Week 32

2. Key Migration Roles and Responsibilities

Role	Responsibility
Executive Sponsor	Final sign-off on the Data Migration Plan and all mock load reconciliation results. Approves the Go/No-Go decision
Data Migration Lead (Project)	Manages the overall migration effort, tracks status, manages the ETL team, and reports progress to the Project Manager
Data Process Owner (Business)	The subject matter expert for a specific data object (e.g., Inventory Manager for Inventory Master). Responsible for cleansing, validation, and sign-off of their data
Key Users/Business Analysts	Executes data reconciliation procedures and validates the integrity of the data in the new ERP test environment

3. Data Cleansing and Validation Checklist

1. **Completeness:** Is all required data (as per scope) extracted?
2. **Accuracy:** Does the data reflect the actual state of the business?
3. **Integrity:** Are all key relationships intact (e.g., all Customers linked to valid Customer Groups)?
4. **Format:** Is the data formatted correctly for the new ERP's standards (e.g., date formats, length limits)?
5. **No Duplicates:** Have all duplicate records been eliminated or merged?
6. **Unique IDs:** Have new, clean unique identifiers been assigned where necessary?

Master Data Migration Structure

This template provides standardized headers for organizing and tracking the required data fields for common master data objects. This structure ensures that both the business owner and the technical team know which fields are mandatory and who is accountable for cleansing.

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Customer Master Data

Field Name (ERP Target)	Mandatory?	Data Type	Cleansing Owner (Department)	Notes / Cleansing Rule	Example Value
Customer_ID	Yes	Alphanumeric	Sales	Must be unique; cannot exceed 10 characters	CUST00123
Customer_Name	Yes	Text	Sales	Must be a clear, legal entity name	Acme Corp.
Status	Yes	Lookup	Sales	Must be one of: Active, Inactive, Blocked	Active
Billing_Address_Line_1	Yes	Text	Finance	Standardized address format required	123 Main St
City	Yes	Text	Finance		Boston
Region	Yes	Text	Finance	State/Province code lookup required	MA
Credit_Limit	Yes	Numeric	Finance	Currency code lookup (USD/EUR) required	50000.00
Sales_Rep_ID	No	Alphanumeric	Sales	Link to the new ERP Sales Rep structure	REP456
Last_Activity_Date	Yes	Date	Sales	Date format: YYYY-MM-DD	2025-10-15

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Material/Product Master Data

Field Name (ERP Target)	Mandatory?	Data Type	Cleansing Owner (Department)	Notes / Cleansing Rule	Example Value
Material_ID	Yes	Alphanumeric	Operations	Must be unique; new naming convention implemented	FIN-00472
Material_Description	Yes	Text	Product Mgmt	Max 50 characters	1/2 in. Stainless Steel Bolt
Unit_of_Measure (Base)	Yes	Lookup	Operations	Must be one of: EA, KG, BOX, M	EA
Inventory_Valuation_Method	Yes	Text	Finance	Must be one of: FIFO, LIFO, Standard Cost	FIFO
Safety_Stock_Level	No	Numeric	Supply Chain	Minimum quantity for reorder	150
Weight	No	Numeric	Operations	Decimal value must include UOM (kg/lb)	0.5
Product_Group	Yes	Lookup	Product Mgmt	Must align with the new product hierarchy	FASTENERS
Active_BOM_ID	No	Alphanumeric	Engineering	If a manufactured item, link to the Bill of Materials	BOM-00472

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Open Balances (Financial Data - as of Cutover Date)

Field Name (ERP Target)	Mandatory?	Data Type	Cleansing Owner (Department)	Notes / Cleansing Rule	Example Value
GL_Account_Code	Yes	Alphanumeric	Accounting	Must match the new Chart of Accounts structure	1100-001
Cost_Center	Yes	Alphanumeric	Accounting	Must match the new Cost Center structure	CC_MKT
Debit_Amount	Yes	Numeric	Accounting		15000.00
Credit_Amount	Yes	Numeric	Accounting		0.00
Transaction_Date	Yes	Date	Accounting	Should be the cutover date	2025-12-31
Reference_Text	No	Text	Accounting	Description for the Journal Entry	Initial Balance Load