

WMS GO LIVE CHECKLIST

Tryon Solutions

Authored by: James Prior

Remember that this checklist serves as a starting point, and it is essential to adapt it to your specific WMS implementation project. Ensure that you have a clear understanding of your project's unique requirements and tailor this checklist accordingly.



Tryon Solutions

How to use the Checklist:

- **Customize Sections:** Review each section of this checklist and tailor it to your specific project's requirements.
- **Responsibilities:** Assign responsibilities to team members or departments for each checklist item.
- **Dates and Deadlines:** Set clear timelines for each task and ensure that they are met.
- **Documentation:** Keep detailed records of all actions taken during the go-live process.
- **Contingency Planning:** Make sure that you have a well-defined contingency plan in case of unexpected issues.
- **Expectations:** If necessary, create an additional checklist to manage customer expectations or deliverables as per your project scope and agreements.

Overall WMS				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
User accounts are configured in the production instance(s) with the appropriate privileges, and verified to work on their respective devices/platforms prior to go live				
All required physical and virtual resources are budgeted and earmarked for use prior to go live				
Communication and workspace plans are in place				
Any customizations or deviations from standard product are known and assigned to specific developers, and have been signed off on by the customer				

Training and Documentation				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
Users understand the basic project plan, naming conventions/terms, and where to go for assistance				
Users have been trained on their tasks, best-practices, and responsibilities and have clearly demonstrated competence				

Key users are ready to assist and support the implementation				
All processes, including SOP, have been documented to agreed-upon standards and copies are available to everyone involved				
Training materials are available to everyone involved and are designed to be updated as needed for future versions				
Any RF function keys or other helpful shortcuts are documented and available as needed				

Data Conversion				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
Data conversions have been performed and all of the master and transactional data are loaded and verified into the production instance				
All transactions have been removed from the production instance				
Data backup and database maintenance strategies have been agreed upon and tested				

Cutover / Migration				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
Everyone involved agrees to the cutover plan and timeline				
All open orders and receipts are closed and completed in current system prior to go live				
Any necessary rollouts or hotfixes have been applied in the proper sequence and according to schedule				

Testing				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
Initial vendor and customer infrastructure compatibility and reliability check				
End-to-end user acceptance testing has been performed, and the customer has signed off that all issues have been resolved and all connections between the WMS vendor and customer instances are verified working				
Integration testing has been performed on the entire production system (including any involved ERP systems), and the customer has signed off that all issues have been resolved				
Regression testing has been performed (preferably via an automated testing solution) on the entire production system for key user flows like receiving, put away, picking, inventory management, and dispatch				
Performance/Volume testing has been performed on the entire system using peak production volumes, and the customer has signed off that the response times are adequate				

Hardware and Consumables				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
All workstations and instances have been identified and configured, and can connect to production instances				
All report and label printers have been identified and configured, and have had at least several test prints performed				

Any required RF devices, scanners, and scales have been identified and configured, and tested to read bar codes, and can connect to the production instances				
Any required scanners and scales have been identified and configured, and can connect to the production instances				
Adequate quantities of toner and/or label stock have been acquired to support printing reports and labels				

Post Go Live				
Assignments & User Roles	Completed Y/N	Comments	Sign-Off	Date
Any support personnel or other team members remaining on-site are known to everyone involved in the project				
The support ticket process and review schedule has been communicated to everyone involved in the project				
Success metrics and KPIs are in place to track the progress post go live				
Disaster recovery/contingency procedures and business continuity plans are in place for worst-case scenarios, including a master inventory data reload option				
All customer agreements (whether tied to service levels, performance, capacity, etc...) have processes in place to measure, manage, and track them				

INFO@TRYONSOLUTIONS.COM

888.256.2177

TRYONSOLUTIONS.COM

Tryon Solutions is a registered trademarks of Tryon Solutions, Inc. Other products and services may be trademarks of their respective companies.
 Copyright © 2023 Tryon Solutions, Inc. All Rights Reserved.