

Software Migration Checklist

Assign the decisions, data, owners, and tests that make a system change manageable.

01 Agree what will move and who will approve it

Use this checklist as a working record from project kickoff through retirement of the old system. Enter actual names and dates, keep supporting evidence, and mark an item complete only when its owner has verified the result.

Define the launch boundary

- ☐ List the locations, programs, facilities, memberships, and payment workflows in the first launch.
- ☐ Choose a full or phased launch. Document which system owns each live workflow during the transition.
- ☐ Identify registration openings, renewals, billing dates, and events that affect the schedule.
- ☐ Confirm legacy contract end date, export rights, fees, and archive access.
- ☐ Classify each data set as migrate, archive, or exclude, with an approved reason.
- ☐ Agree how long historical information must remain available and who can retrieve it.

Responsibility	Named owner	Due date
Source exports and legacy access	_____	_____
Data mapping and configuration	_____	_____
Balances and payment reconciliation	_____	_____
Privacy and secure transfer	_____	_____
Staff testing and training	_____	_____
Launch approval and communication	_____	_____

Scope checkpoint. Cogran can import compatible registration, reservation, member, and contact information. Other records, attachments, history, balances, and payment arrangements require an agreed conversion approach.

Software Migration Checklist

02 Prepare files that can be checked

Keep an untouched source export. Work from a dated copy and preserve original record identifiers so you can trace an imported record back to its source.

Data set	Fields and relationships to review
Households and contacts	Source IDs, names, contact details, household links, communication preferences
Registrations	Participant and session IDs, dates, status, fees, and related payments
Reservations	Facility IDs, dates, times, approval state, and related charges
Memberships	Member ID, household links, type, start/end dates, and current status
Balances and credits	Source reference, amount, accounting treatment, and agreed destination
Forms and documents	Record owner, version/date, file format, retention, and import or archive decision

File preparation checklist

- ☐ Resolve missing required fields and malformed dates, phone numbers, or email addresses.
- ☐ Review duplicates with an owner; do not merge households solely because names match.
- ☐ Confirm time zones, leading zeros in IDs, date formats, and status values.
- ☐ Approve a mapping sheet: source field, destination, transformation, and exception handling.
- ☐ Agree an access-controlled transfer method and a retention period for working copies.
- ☐ Record counts and control totals before the import, including open balances where in scope.

Handle payment data separately. Do not place raw card numbers or security codes in migration files. Saved payment credentials, recurring authorizations, passwords, and historical signatures are not assumed transferable. Confirm the approved route or customer re-enrollment process.

Software Migration Checklist

03 Rehearse and reconcile

Run a trial import before the final move. Test records that are ordinary and records that are difficult: multi-child households, waitlists, cancellations, future reservations, and membership renewals.

Check	Expected evidence	Owner and date
Completeness	Imported, rejected, and excluded counts explain the source total	_____
Relationships	Participants link to the correct households and activities	_____
Money	Approved balances and totals match by relevant account/category	_____
Documents	Required records can be retrieved in the agreed system or archive	_____
Permissions	Staff see the required information and no unrelated restricted data	_____
Exceptions	Each failure has a correction, exclusion, or accepted disposition	_____

End to end acceptance tests

- ☐ Find or create a household and complete a multi-participant registration.
- ☐ Apply an eligibility rule, discount, capacity limit, and waitlist invitation.
- ☐ Process the approved payment and refund scenarios; verify reporting.
- ☐ Open a future reservation and confirm its time, facility, status, and fees.
- ☐ Check a member or participant in and verify the roster or attendance record.
- ☐ Send a test communication and verify its intended recipients and content.
- ☐ Correct a rejected record, rerun the agreed process, and check for duplication.

Unresolved defects and decision owner

A passed file upload is not acceptance. The receiving records, relationships, and operational results must be checked.

04 Control cutover and close the old system

Before the final import

- ☐ Announce any service interruption, account instructions, and where customers can get help.
- ☐ Set the source-system freeze date and time, including the time zone.
- ☐ Capture changes since the trial export, including payments and cancellations.
- ☐ Retain the final source files and log who transferred and imported them.
- ☐ Reconcile final counts and balances; retest the critical workflows.
- ☐ Confirm staff access, launch contacts, and customer-facing links.

Make a deliberate go or no go decision

Launch only after critical tests pass and the authorized owner accepts any remaining exceptions. Agree in advance which problems require a delay, who decides, and how staff and customers will be told.

Recovery requires a transaction plan. If new registrations or payments have already been taken, reopening the old system can split records or duplicate transactions. Log all activity after cutover and reconcile it before any controlled return to the prior system.

Final approval	Name	Date
Data and financial reconciliation	_____	_____
Operations and staff readiness	_____	_____
Launch authorization	_____	_____

After launch

- ☐ Review first registrations, first attendance records, and the first payout reconciliation.
- ☐ Resolve migration exceptions and confirm the archive can be searched.
- ☐ Remove temporary access and securely retire working copies under the agreed policy.
- ☐ Authorize legacy cancellation only after acceptance and retention arrangements are complete.

Use alongside the Implementation and Launch Guide. [Plan your move with Cogran.](#)