

Legacy system discovery checklist

Recover the knowledge you need before changing a system nobody fully understands.

Purpose and people

- ☐ What business outcomes depend on this system? Who uses it and who supports it?
- ☐ Find business owners, long-serving users, suppliers and people who handle exceptions.
- ☐ Separate observed facts, assumptions and unknowns. Record evidence and the person who can confirm it.

Notes: _____

Rules, data and dependencies

- ☐ Inventory interfaces, databases, scheduled jobs, reports, file exchanges and manual steps.
- ☐ Trace a representative record from creation through change, use and deletion.
- ☐ Capture validation rules, calculations, status changes and undocumented workarounds.
- ☐ Record where credentials and configuration are managed without copying secrets into the worksheet.

Notes: _____

Operations and risk

- ☐ Identify critical dates, peak periods, recovery arrangements and support constraints.
- ☐ Confirm access through authorised owners. Use approved read-only discovery where possible.
- ☐ List upstream and downstream teams, failure impacts, data quality concerns and single points of knowledge.

Notes: _____

Turn discovery into a plan

- ☐ Draw a current-state map and review it with business and technical colleagues.
- ☐ Prioritise unknowns by consequence and test the most important assumptions first.
- ☐ Deliver a dependency register, business-rule catalogue and options for retain, improve, integrate or replace.

Notes: _____

Want help working through this? Email david.butcher@pivotalinnovations.co.uk