SAP BA Requirements Checklist

For Business Analysts entering SAP S/4HANA projects - from fit-to-standard workshops through go-live.

Covers: Fit-to-Standard Workshop Prep | Gap Log Structure | UAT Scenario Design | Data Migration Field Mapping | Go-Live Readiness

6,600+	53%	$79K	2027
Open SAP BA positions (May 2026)	IT leaders cite BTP integration as top skill	Avg U.S. SAP BA salary (2026)	SAP ECC mainstream maintenance end

How to use this checklist: Work through each section in sequence. Check items as complete. Items marked [BLOCKER] must be resolved before advancing to the next phase. Items marked [OWNER] require a named responsible party before the item is considered actionable.

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SECTION 1 - Fit-to-Standard Workshop Preparation

Complete before the first workshop session

- [ ] Process inventory complete - all in-scope business processes listed with IDs
  BLOCKER
  Minimum: process name, owning department, frequency, current system
- [ ] Process owner assigned for each in-scope process
  BLOCKER | OWNER
  Every process needs a named business contact who can make decisions
- [ ] SAP module mapping done - each process mapped to relevant SAP module(s)
  e.g., Vendor Invoice Processing -> SAP MM + FICO
- [ ] Current-state process flows documented (BPMN or swimlane)
  At least high-level. Fit-to-standard sessions compare current state to SAP standard

- [ ] Legacy system pain points documented per process
  Stakeholders need to articulate WHY a process may need to change
- [ ] SAP best-practice demo environment confirmed accessible
  Functional consultant should demo standard process before the gap discussion starts
- [ ] Workshop agenda distributed to all attendees 5+ business days in advance
  Include: process scope, SAP module being covered, expected outputs per session
- [ ] Attendee list confirmed - include process owner, end users, IT lead, BA, functional consultant
  BLOCKER
  Missing process owner = unproductive workshop. Reschedule if necessary
- [ ] Gap log template prepared and shared
  Fields: Gap ID, Process Ref, Description, Business Justification, Solution Type (Standard / Config / Enhancement), Effort Estimate, Owner, Status
- [ ] Workshop facilitation ground rules agreed
  Decisions made in the room are binding. Changes require formal change request.

SECTION 2 - Gap Analysis and Gap Log Management

Maintained throughout Explore phase

- [ ] Gap log created in agreed tool (Jira, Confluence, or SAP Focused Build)
  BLOCKER
  Do not maintain a gap log in a personal spreadsheet. It must be team-accessible.
- [ ] Each gap has a unique ID and links to the source process
  Format: GAP-[MODULE]-[NNN], e.g., GAP-FICO-001
- [ ] Gap resolution type recorded for each item
  Options: (1) Accept SAP standard, (2) Configure variation, (3) Custom development (RICEF), (4) Workaround, (5) Out of scope
- [ ] Custom development gaps escalated to Solution Architect for RICEF estimate
  OWNER
  BA documents the business requirement. SA estimates the build effort.
- [ ] Out-of-scope gaps formally rejected and communicated to stakeholder
  Never silently drop a gap. Stakeholder must acknowledge the exclusion in writing.
- [ ] All gaps reviewed and baselined at end of Explore phase
  BLOCKER
  Unresolved gaps at Explore close become project risks. Log and escalate.
- [ ] Gap log linked to RTM (Requirements Traceability Matrix)
  Each gap should trace to at least one requirement and one test case
- [ ] Configuration decisions documented with business justification
  Future auditors, upgrade teams, and new project members will ask why a config was made

- [ ] High-risk customizations (ABAP enhancements) documented with upgrade risk flag

WARN

Every custom object is a liability at the next SAP upgrade

SECTION 3 - Requirements Documentation

BRD, user stories, and RTM

- [ ] Requirements format agreed with project team (BRD, user stories, or hybrid)

SAP Activate Agile uses user stories in Focused Build. Traditional programs use BRDs.

- [ ] Each requirement has a unique ID, description, acceptance criteria, and priority

BLOCKER

No requirement without testable acceptance criteria. Vague requirements fail UAT.

- [ ] Functional requirements written from business perspective - not system configuration steps

Wrong: 'Configure tax code V1 for SD.' Right: 'System must calculate 8% state tax on orders shipped to NY.'

- [ ] Non-functional requirements documented (performance, security, availability)

e.g., 'Vendor invoice posting must complete within 3 seconds for batches under 500 records'

- [ ] Integration requirements documented for each system-to-system data flow

Include: data elements, frequency, direction, error handling, HIPAA/data classification

- [ ] RTM created linking requirements to: design decisions, test cases, and configuration

BLOCKER

Use a spreadsheet or Jira/Focused Build RTM feature. Update it continuously.

- [ ] Reporting requirements documented with field-level detail

Who runs the report, how often, what filters, what output format (Fiori, SAC, Excel)

- [ ] Authorization/role requirements documented per process

Who can create, change, display, approve, and delete in each transaction

- [ ] Requirements baselined and change-controlled after Explore phase sign-off

BLOCKER

Post-baseline changes go through formal change request with impact assessment

SECTION 4 - Data Migration Requirements

Define before Realize phase begins

- [ ] Data migration scope confirmed - which objects are in scope

Common objects: vendor master, customer master, material master, open POs, open AR/AP, cost centers, profit centers, asset master, employee data

- [ ] Source-to-target field mapping document created for each migration object

BLOCKER

Columns: Source System, Source Field, Source Data Type, Transformation Rule, Target SAP Field, SAP Table, Required (Y/N)

- [ ] Data quality rules defined for each required SAP field
  e.g., Vendor bank account must be 10 digits. Country code must match SAP country table.
- [ ] Data extract approach confirmed with source system team
  Frequency of extract, format (CSV, XML, flat file), encryption requirement for PII
- [ ] Legacy data cleansing owner assigned
  OWNER
  Data cleansing is a business responsibility, not an IT responsibility. Name the owner.
- [ ] Data migration validation queries written and reviewed
  SQL checks to compare record counts, key field values, and totals between source and SAP
- [ ] Reconciliation report format agreed with Finance/Audit
  BLOCKER
  For financial data: migrated balance must match legacy balance to the cent
- [ ] Historical data archival decision documented
  Data not migrated to SAP - is it kept in legacy system read-only? Archived? Deleted?
- [ ] HIPAA/PII data classification completed for all migration objects
  PHI fields in employee or patient-adjacent data need encryption and access controls
- [ ] Mock migration run planned and scheduled before cutover
  BLOCKER
  At least one full mock migration to validate timing, transformation rules, and load errors

SECTION 5 - UAT Scenario Design

Realize phase - before UAT execution begins

- [ ] UAT scope defined - which business processes are covered in UAT
  BLOCKER
  All in-scope processes should have at least one end-to-end test scenario
- [ ] Test scenarios written as end-to-end business transactions, not unit tests
  Example FICO/MM scenario: Create PR -> Convert to PO -> Post GR -> Post Invoice -> Verify GL Accounting Document
- [ ] Each test scenario has: Test ID, Preconditions, Test Steps, Expected Result, Actual Result, Pass/Fail, Tester Name, Date
  BLOCKER
  Do not accept verbal test results. Written record required for sign-off.
- [ ] Negative test cases included for each critical process
  Test what happens when inputs are wrong, incomplete, or out of tolerance
- [ ] Integration test scenarios designed to cross module boundaries
  At minimum: Purchase-to-Pay (MM/FICO), Order-to-Cash (SD/FICO), Record-to-Report (FICO)
- [ ] Test data prepared in QA environment before UAT starts
  Business testers should not spend UAT time creating master data. Pre-load it.

- [ ] UAT defect triage process agreed

BLOCKER

Who classifies defects? What is the SLA for fix-retest cycles? What constitutes a go-live blocker?

- [ ] Business sign-off criteria defined before UAT starts

BLOCKER

e.g., 'All P1 defects resolved. No open P2 defects without approved workaround.'

- [ ] Regression test approach defined for fixes applied during UAT

Every defect fix must be regression-tested to confirm no new issues introduced

- [ ] UAT exit report template prepared

Summarizes: total scenarios, pass rate, open defects by priority, sign-off recommendation

SECTION 6 - Go-Live Readiness

Complete at least 2 weeks before cutover

- [ ] UAT formally signed off by all business process owners

BLOCKER

Written sign-off. Email confirmation is acceptable. Verbal is not.

- [ ] All P1 and P2 defects resolved or formally risk-accepted

BLOCKER

Risk acceptance requires sponsor signature, documented workaround, and post-go-live fix plan

- [ ] Cutover plan documented with step-by-step tasks, owners, and timing

BLOCKER

Include: system freeze window, data migration execution sequence, validation checks, rollback decision point

- [ ] Rollback criteria and rollback plan documented

BLOCKER

Define the exact conditions under which go-live is aborted and legacy system is reinstated

- [ ] Interface cutover sequence documented

Which interfaces go live first, which go live after SAP is validated, and which remain on legacy temporarily

- [ ] End-user training completed and attendance recorded

Training completion percentage by role. Target: 95%+ of identified users trained

- [ ] Hypercare support plan documented

Who is on-call during hypercare? What is the incident escalation path? Duration of hypercare period?

- [ ] Post-go-live validation queries prepared

Day 1 SQL checks to confirm transaction counts, GL balances, and interface payload volumes match expectations

- [ ] Legacy system read-only freeze confirmed with IT

BLOCKER

Legacy must be locked before migration begins. Prevent parallel updates.

- [ ] Project manager and sponsor briefed on open risks
  No surprises on go-live day. All known risks visible to decision-makers in advance.
- [ ] Hypercare defect tracking mechanism active
  A dedicated channel (Jira, ServiceNow queue, or equivalent) for post-go-live issues

Legend and Reference

Tag	Meaning
BLOCKER	Must be complete before advancing to the next phase. Do not proceed without resolving.
OWNER	Requires a named responsible party assigned before the item can be considered actionable.
WARN	Proceed with caution. Item carries risk that should be escalated to project leadership.

Key References

BABOK v3	IIBA Business Analysis Body of Knowledge - requirements life cycle management
SAP Activate	SAP's official implementation methodology for S/4HANA projects
SAP Focused Build	SAP's Agile delivery tool - requirements, test cases, defects, transports
SAP Fiori Apps Library	apps.sap.com/fiori - official catalog of all standard Fiori apps and their prerequisites
C_TS410 Exam	SAP Certified Associate - Business Process Integration with SAP S/4HANA
HIPAA	Required for any patient-adjacent or payer data in SAP implementations
ICD-10 / CARC Codes	Relevant for healthcare payer SAP implementations involving claims data mapping