PHASE	ACTIVITY	OWNER	SYSTEM	APP	NOTES
CORPORATE STRATEGY AND INITIATIVE MANAGEMENT (PRE-PROJECT)					
	Initiative identified: assign sponsor and initiative leader	Executive board	-	-	Usually from strategic planning or acute issues
	Create initiative team to define vision, high level scope, business case	Initiative lead	-	-	Things can start to go wrong at this early stage if the right expertise isn't present in initial visioning and planning
	Build vision (very high level scope and design)	Initiative team			Assumption based high level vision of the future process, systems, data, reporting
	Build business case	Initiative team	-	-	Target benefits/rationale, costs, risks, impacts, clear assumptions
	Make decision to pursue SAP S/4HANA Cloud	Executive board	-	-	This leads to engaging with SAP over scope, solution, licenses etc.
	Identify/plan change management approach	Sponsor	-	-	Recommend to utilise Prosci ADKAR
	Identify and launch pre-preparation projects, key examples:				Depending on the current state, pre-projects can significantly enhance the quality of the SAP design and build, whilst also de-risking the programme.
	Target operating model	Sponsor	-	-	If there are significant organisation changes in parallel with SAP it may make sense to produce a target operating model as an initial step. This can help ensure processes and roles in SAP fit with the strategic organisation direction
	Conceptual data model and reporting design	Sponsor	-	-	If legacy systems have reporting issues and/or harminised reporting is a key benefit, it may make sense to run a conceptual re-design of key reporting hierarchies before starting SAP e.g. chart of accounts, profit centers, customer hierarchy, etc.
	Legacy system data cleansing	Sponsor	-	-	If master data and transactional data have not been well managed or cleansed, this can be a significant issue during SAP implementation, this can take a long time to fix.
	Resourcing: individuals and delivery partners				
	Identify key internal project team roles for next phase	Initiative lead	-	-	Identify candidates and start internal recruiting process Identify backfiling where needed
	Systems integrator partner selection	Sponsor	-	-	If relying on an external partner or SAP for implementation
DISCOVER					
	Staff resources for discover phase team	Initiative lead	-	-	For example: - Process/technology owners for scope identification/confirmation - Enterprise architects for IT principles alignment - Procurement for contract and licensing discussions
	Discover phase kick-off	Initiative lead	-	-	Project team + stakeholders Review outcome of previous activities Review detailed plan for phase
	Build on initial business case with specifics for S/4HANA Public Cloud	Initiative lead	-	-	High level scope, benefits, costs, risks etc.
	Complete SAP digital discovery assessment (DDA)	Initiative lead	-	DDA	Detailed questions about business processes Helps to decide between public and private cloud Provides baseline initial scope for refinement during PREPARE/EXPLORE
	Make purchase decision	Executive sponsor	-	-	
	Sign S/4HANA Cloud Contract	Executive sponsor	-	-	Signer received PO confirmation e-mail (purchase details and next steps)
	Welcome email on contract start date	IT contact or 'signer'	-	-	Detailed information about starting project

	Task	Owner	Link		Notes
	Welcome email from SAP BTP	IT contact or 'signer'	-	-	
	Attend onboarding webinar	Project manager or IT contact	sap.com	-	SAP webinars covering everything about getting started with the project (Navigate to the SAP customer onboarding resource center)
Start legacy system data preparation as soon as possible					(Ideally already launched as a project)
	Start analysis and cleansing of master data and transactional data	Data lead	-	-	Proceed with EXPLORE activities listed in the next phase ASAP
Project planning					
	Create a work breakdown structure including estimation of effort for the work based on the defined scope. As part of this identify the critical path and minimum project duration.	Project manager	-	-	Often SAP program target go-live dates are set without formal scope-based effort estimation. Even if a target go-live date and duration is already set, it's still worth a formal effort and duration estimation to identify feasibility, and look at corrective actions.
	Identify go-live date or validate pre-defined target date	Project manager	-	-	Consider the easiest migration is at fiscal year end. This removes the need to migrate P&L balances, and also will reduce the number of open items.
Project resourcing					
	Staffing of internal project team members for next phase	Sponsor	-	-	Including clear role descriptions and responsibilities
	Recruit external contractors/3rd party service providers	Sponsor	-	-	Including clear role descriptions and responsibilities
	Pre-plan/line-up potential need for resources later	Sponsor	-	-	If gaps are expected development resources may be required later. This could include skills such as ABAP, integration, Python, etc. Start to plan for this potential early.
Change & communications management					
	Identify all potentially impacted parties	Change manager	-	-	Stakeholders, customers, end users (internal and external)
	Hold initial change management surveys/interviews/discussions	Change manager	-	-	Ideally a review of potential change impacts from across the organisation can be collected prior to prepare to allow time to adjust the scope and preparation approach if needed. At this stage focus on Prosci ADKAR: - A: Awareness of the need for change - D: Desire to participate and support the change
	Internal lessons learned workshop: hold workshop to look at internal history with ERP projects, try to capture past issues and failures and plan to avoid	Project manager	-	-	Build learnings into project approach and change approach
	Request SAP or partner to run lessons learned workshop on other organisations experiences with S/4HANA Cloud Public	Partner PM	-	-	Build learnings into project approach and change approach
Project & stakeholder management					
	Document and deploy project management	Project manager	-	-	Scope management, plan management, issues management, risk management, change management, resource management, escalation procedure, reporting procedure, meeting schedules, ways of working.
	Stakeholder identification and analysis	Project manage and change manager	-	-	
	Create stakeholder collaboration plan	Project manager and change manager	-	-	Information updates frequency/content, workshops schedule, key reviews (requirements, design, etc.)

Discover stage gate GO / NO GO	Project manager	-	-	Check: - DDA results indicate S/4HANA Cloud Public is suitable - Project team resources identified and available - 3rd party partner/SAP engaged and available - Stakeholder alignment on benefits, scope, and approach
Detailed plan for next phase - shared & presentation walkthrough sessions	Project manager	-	-	Team for next phase should be 100% clear on activities, templates, responsibilities etc.

PREPARE

Phase kick off	Project manager			
Set up and onboard project team, key roles include:				
Onboarding of 3rd party project team				
Partner project manager and partner stakeholder	Project manager	-	-	
Lead configuation expert (SAP / partner)	Partner PM	-	-	
Partner or SAP line of business experts (1-2 per area)	Partner PM	-	-	
If new to the business, recommend to run various trainings	Project manager	-	-	Business model, IT architecture, processes, controls etc.
Provisioning of any hardware if required	IT contact	-	-	For example company laptops if needed for network tools
Internal team				
Sponsor(s) and steering committee	Sponsor	-	-	
IT contact	Sponsor	-	-	
Project manager	Sponsor			
Line of business experts	Sponsor/stakeholders	-	-	It is critical that the sponsor and stakeholders identify experts in each line of business that can represent their processes. They should be available for the entire project duration and be qualified to accept standard processes and identify gaps. Number depends on size/complexity of project and LoB SAP recommends 2-3 per LoB.
Change manager(s)	Sponsor	-	-	
Extended team (as necessary, scope dependant)	Project manager	-	-	Examples: integration, developers, data migration, enterprise architects
Plan / run internal team project training	Project manager	-	-	SAP training / partner led training Implementation approach, LoB config, etc.
Systems provisioning				
Provision the S/4HANA Cloud Landscape Bundle:	IT contact	SAP for Me	-	Systems for EXPLORE phase. S/4HANA dev/test/prod provisioned later
1) Cloud Identity Services		-	-	Includes authentication (IAS) and provisioning (IPS) services
2) S/4HANA Starter System		-	-	Includes development client 80, and customising client 100 With S/4HANA Cloud Public development is split into two clients, the customising client 100 is used for the majority of configuration. Client 80 is reserved for more complex custom developments.
3) Cloud Application Lifecycle Management (Cloud ALM)		-	-	Used as an implementation management tool
4) Central Business Configuration (CBC)		-	-	Used as a central reference point for SAP configuration
IT contact receives emails with login information	IT contact	Email	-	
Activate Cloud Identity Authentication Service (IAS)	IT contact	IAS	-	Must be activated first. Use link in provisioning email
Cloud Application Lifecycle Management (ALM) set up				Clould ALM will be used for project, requirements & design management
Create project in Cloud ALM	Partner PM	ALM	-	SAP Activate Roadmap: SAP S/4HANA Cloud Public Edition (3-system landscape) - Implementation

Review standard roles	Partner PM	ALM	-	
Create/change roles in Cloud ALM	Partner PM	ALM	-	For example: one role for each LoB area
Add team members to roles in Cloud ALM	Partner PM	ALM	-	Turn of any roles not required
Add general dates in timeboxes in Cloud ALM	Partner PM	ALM	-	Note: typically fit to standard takes the longest time
Assign scopes in Cloud ALM	Partner PM	ALM	Manage scopes apps	Initial scope based on DDA, may evolve through fit to standard
Deploy content in S/4HANA Cloud Starter System (S4 SS)				S/4HANA Cloud Starter System is used to demo standard processes The processes are aligned with SAP Signavio Best Practices
Add users to Central Business Configuration using IAS				CBC is used to configure S/4HANA Public Cloud
Create excel and fill in with user details, save as .csv	IT contact	IAS	-	File format: status, loginName, mail, firstName, lastName, groups
Login to IAS, select 'import users tile', load .csv	IT contact	IAS	Import users tile	Once imported, activation emails are sent to users
Login to IPS and run job to replicate users and permissions	IT contact	IPS	-	Run this replication immediately as IAS emails were already sent
Create two spaces in CBC	Lead CE	CBC	-	Use space type 'evaluation' ('enterprise management' brings all LoB) One space for development client 80, one for customising client 100
In each space confirm scope and configuration				This is for demo content, so it's mostly confirmations
Scope	Lead CE	CBC	-	Enterprise management scope bundle includes all LoB best practices These provide the ability to demo processes during fit-to-standard
Countries & ledgers	Lead CE	CBC	-	If multiple countries/regions are in scope choose countries/regions used
Ledgers	Lead CE	CBC	-	If multiple ledgers are required, choose them. For example: IFRS = 1GA, US GAAP = 2VA
Finance settings	Lead CE	CBC	-	Confirm FSV: K4 (4 special periods) Confirm group currency (If required further finance customisation will be part of dev build later)
Organisation structure	Lead CE	CBC	-	Contries/regions above, drive selection of a pre-configured organisation structure for the best practices demo. This is aligned with the Signavio test scripts. (SAP recommends not to adjust at this stage)
Product specific configurations	Lead CE	CBC	-	Minimal/none at this stage as it's just standard processes in the starter system
Share settings with team	Lead CE	CBC	-	Lead CE should share the above settings with LoB CEs to assist with their preparation to run demos in fit-to-standard
Assign deployment target	Lead CE	CBC	-	Connect CBC to S/4HANA Cloud Starter System
Deploy scope and organisation structure	Lead CE	CBC	-	Deploy from CBC to S/4HANA Cloud Starter System
Add team members to workspace	Lead CE	CBC	-	Pre-requisite: ensure team members are created in Cloud Identity with permissions for CBC
Assign CBC roles	IT contact	CBC	-	Lead configuration expert: SAP_CBC_CONSUMPTION_PROGRAM_LEAD LoB CE: SAP_CBC_CONSUMPTION_KEY_USER Project managers: SAP_CBC_CONSUMPTION_AUDITOR IT contact: SAP_CBC_CONSUMPTION_AUDITOR
Set up project team in S/4HANA Starter System				Starter system approach: use standard roles to demo standard processes
IT contact logs in to S/4HANA Starter System	IT contact	S4 SS	-	IT contact has SAP_BR_ADMINISTRATOR which gives access to administraiton tab

	Task	Role	System	App	Details
	Activate all SAP standard roles in S/4HANA Starter System	IT contact	S4 SS	Business Roles Template	Administration > Identity and Access Management > Business Roles Template Select all roles, choose 'create business role' Choose assign spaces based on SAP-delivered space This makes all roles available to be assigned to users.
	IT contact assigns themselves BR_ADMINISTRATOR in S/4HANA starter system	IT contact	S4 SS	-	Edit 'user name = login name for IAS' Remove SAP_BR_ADMINISTRATOR, add BR_ADMINISTRATOR
	Create users for project team in S/4HANA starter system	IT contact	S4 SS	Manage Workforce App	Pre-requisite: users should already be created in IAS Administration > Workforce Master Data > Manage Workforce > Import > Worker Download template, complete with user details, and then upload
	Assign BR_ADMINISTRATOR to all project team members in S/4HANA starter system	IT contact	S4 SS	Maintain Business Roles	This allows all team members to manage permissions to create test users for fit-to-standard sessions
	Verify users have assigned launchpad in S/4HANA starter system	IT contact	S4 SS	-	Administrator > assigned launchpad spaces No apps will display if no space is assigned
	Download users with their assigned permissions from the S/4HANA starter system and upload to IAS to validate and send activation emails	IT contact	S4 SS	Maintain Business Users Identity Provider App	Download from starter systems and upload to IAS. This will validate users, and generate activation emails
Change and communications management					
	Formal communication of project team to stakeholders and wider audience including clear list of contacts	Change manager	-	-	This is important to avoid innacurate rumours spreading related to the project and also to ensure people can get to the right point of contact with questions at any point
	Launch project information sharing space	Change manager	-	-	Recommend to have an online reference with basic project information, Q&A etc.
	Continue discussions, workshops and communications to identify change impacts.				At this stage continue with focus on Prosci ADKAR: - A: Awareness of the need for change - D: Desire to participate and support the change
Project and stakeholders management					
	There should be a formal workshop with line of business leaders (stakeholders) on the role of the line of business expert. The stakeholders should agree that the nominated business experts has authority to represent requirements and agree to solutions for their line of business.	PM / CM	-	-	Often on SAP programs late requirements appear during acceptance testing due to a lack of formality around the knowledge and commitment needed during requirements gathering.
	Prepare phase Go / No Go	Project manager	-	-	Check: - Project team fully resourced - Project team training/knowledge building complete - Systems, tools, and materials for explore ready - Appropriately qualified and experienced Line of business experts
	Project manager publishes detailed plan for Explore (Assess)	Project manager	-	-	Circulate plan Workshop\presentation to team to explain and discuss
EXPLORE (ASSESS)					
	Phase kick off	Project manager			

Task	Role	Tool	Tool 2	Notes
Review DDA in preparaton for x-LoB 'fit-to-standard'	Partner lead CE	-	-	x-LoB means any topic that doesn't fit into a single line of business. May include topics like organisation structure
Review DDA - business proceses, known integrations	Partner LoB CE	-	-	
Co-ordinate Business Driven Configuration Questionnaire (BDCQ)		-	-	This is a questionnairre to gather information for S/4HANA configuration
Send to x-LoB business experts	Project management	-	-	Business experts may need to co-ordinate with others to complete
Send to LoB business experts	Project management	-	-	Business experts may need to co-ordinate with others to complete
Schedule meetings to review BDCQ	LoB CE	-	-	
Loop back and check BDCQ impacts on DDA	LoB CE, lead CE, project managers	-	-	The DDA is the master reference for scope and document the sponsor and stakeholder are familiar with, it should be udpated with any changes.
Prepare for fit-to-standard workshops				
Review in scope proceses & group into workshops	LoB CE	-	-	Test scripts size can help estimate required workshop lengths. Group processss by role into workshops with same LoB experts
Schedule workshops & invite LoB experts	LoB CE	-	-	
Invite change manager and specialists as needed	LoB CE	-	-	Some LoB workshops may require data experts, developers, etc.
Prepare 'mini-kick off' presentation	LoB CE	-	-	
Prepare 'fit-to-standard' presentation	LoB CE	-	-	
Download test scrips from SAP Signavio Process Manager	LoB CE	Signavio	-	
Create test users for each role in scripts	LoB CE	S4 SS	-	
Do test run of scripts and time how long it takes	LoB CE	S4 SS	-	
Plan which analytical apps to demo per LoB	LoB CE	-	-	
Prepare other accelerator and documents	Lead CE / LoB CE	-	-	Sharing links to online training videos may help business experts prepare.
Prepare starter system for fit-to-standard workshops	LoB CE			
Create test users	LoB CE	S4 SS	Manage Workforce App	The system is already provisioned, but each test user should be set up with a role: 'employee' plus one primary business role. Name the users in a way LoB business experts will recognise
Run business process fit-to-standard workshops:				Recommend 2 LoB CE and at least 2 LoB Experts per business role
Organisation structure workshop	Lead CE	S4 SS	-	Suggested by SAP as a specific workshop
Chart of accounts workshop	Lead CE	S4 SS	-	Suggested by SAP as a specific workshop
Run all other LoB workshops	LoB CE	S4 SS	-	As pre grouping designed in workshop preparation
For above workshops, suggest to cover:				Workshops need to cover many topics
Present mini-kick off	Lead CE / LoB CE	-	-	Key principles, design and build approach, ownership, etc.
Demo SAP Signavio	Lead CE / LoB CE	Signavio	-	Process flows, test scripts, tutorials
Demo business process in S/4HANA Starter System	Lead CE / LoB CE	S4 SS	-	
Demo embedded analytics apps	Lead CE / LoB CE	S4 SS	-	See dedicated section below with more details on embedded analytics
Demo various ways to access help in Fiori	Lead CE / LoB CE	S4 SS	-	
Demo Joule	Lead CE / LoB CE	S4 SS	-	
Discuss process fit and identify gaps	Lead CE / LoB CE	-	-	
Review standard business roles and capture role gaps	Lead CE / LoB CE	-	-	Accelerator: 'Application - Workplace List'
Review Fiori space/page/app layout and capture desired changes				Closely related to role discussion
Review list of objects for migration	Lead CE / LoB CE	-	-	Where an object represents a set of data made up of fields. Including master data and transactional data. Examples: material records, accounts, balances, open items

Review known integration requirements from DDA and adjust	Lead CE / LoB CE	-	-	Review systems sending or receiving data to S/4HANA It's likely DDA participants wouldn't know all details of all integration
Gather remaining BDCQ configuration values	Lead CE / LoB CE	BDCQ	-	Validate L2 answers, capture L3
Update requiremens in Cloud ALM during workshop	Lead CE / LoB CE	ALM	-	Recommended to have one project team member update Cloud ALM directly during the 'fit-to-standard' workshop to ensure the discussion is captured correctly
Identify change impacts	Change manager			Ideally a change manager participates in the 'fit-to-standard' and notes potential change impacts based on the LoB CE / LoB expert discussion (if a change manager can't participate, another person can note these)
Identify training needs	Training lead	-	-	As with change impacts, ideally someone notes training needs during the 'fit-to-standard' discussion. This can include the tangible process specific points, but also other points by observing how easy it is for LoB experts to understand the vision and demo solution. (Potentially the same person can focus on capturing change impacts and training needs).
For gaps identified, start the discussion on solutions				Where it makes sense start the discussion in the workshop
Potential process adaptations to switch to SAP standard	Lead CE / LoB CE	-	-	Pros and cons, is the existing process really a USP?
Configuration options to investigate	Lead CE / LoB CE	-	-	Check if there is anyway to close the gap with standard configuration
Potential 'in-app' key-user developments/extensions	Lead CE / LoB CE	-	-	Examples: custom fields, layout changes, output forms/email changes, custom business objects/logic
Potential 'in-app' developer developments/extensions	Lead CE / LoB CE	-	-	Examples: extensions of released SAP objects, custom apps
Potential 'decoupled' side-by-side developments/extensions	Lead CE / LoB CE	-	-	Examples: custom apps (ABAP, Java, JS, Python, etc.)
Potential CDS view or analytical query or app customisations	Lead CE / LoB CE	-	-	Examples: adding fields to CDS views, creating new views (really a subset of above categories, but worth calling out individually)
Note potential integration requirements if any 'side-by-side' developments are envisioned	Lead CE / LoB CE	-	-	Decoupled 'side-by-side extensions identified above will require integration
Immediate follow up after 'fit-to-standard'				
Ensure all requirements and gaps are updated in Cloud ALM	Lead CE / LoB CE	ALM	-	
Discuss change management impacts with change manager	Lead CE / LoB CE	-	-	Add key topics to project change impacts log
Loop back to confirm DDA scope	Lead CE / LoB CE	DDA	-	
Start formal tracking and reporting of gaps and developments	Lead CE / LoB CE	ALM	-	
Update resourcing requirements for developers or specialists based on gaps identified	PM / Lead CE / LoB CE	-	-	
Formal sign off on 'fit-to-standard' by LoB experts	LoB experts	-	-	Two very important formal sign offs to proceed: - 1) confirmation of standard processes 'fit' for the business - 2) clear identification of any gaps that need to be resolved.
Special business topics for business process 'fit-to-standard'				Either covered in LoB fit to standard where releveant, or separate session
Responsibiity management				
Demo responsibility management	Lead CE / LoB CE	S4 SS	-	Responsibility managemnet (1NJ) in Signavio Example: defining team/persons for purchase req approval
Identify LoB scenarios for responsibility management	Lead CE / LoB CE	-	-	
Situation handling				
Demo situation handling	Lead CE / LoB CE	S4 SS	-	Situation handling (31N) in SAP Signavio Example: Expiring contracts

Identify LoB scenarios for situation handling	Lead CE / LoB CE	-	-	
Business workflows				
Demo business workflows	Lead CE / LoB CE	S4 SS	-	
Identify LoB scenarios for business workflow	Lead CE / LoB CE	-	-	Many function specific apps exist to define workflows
Intelligent Scenarios				
Demo LoB relevant signavio intelligent scenarios	Lead CE / LoB CE	Signavio/S4 SS	-	
Identify any LoB scenarios for implementation	Lead CE / LoB CE	Signavio/S4 SS	-	
Demo of SAP Build Process Automation	Lead CE / LoB CE	S4 SS	-	If more advanced workflow/automation needed (Requires additional license)
Detailed list of embedded analytics topics				Either in business process 'fit-to-standard' or separate sessions
Demo LoB relevant CDS views and analytical queries	Lead CE / LoB CE	S4 SS	-	- View browser for CDS views - Query browser for analytical queries
Demo LoB relevant embedded anlaytics capabilities	Lead CE / LoB CE	S4 SS	-	
Analytical list reports	Lead CE / LoB CE	S4 SS	-	These contain a mix of analytic figure and transaction lists - action oriented
Multidimensional reports	Lead CE / LoB CE	S4 SS	-	Display data about a focused topic (e.g. Sales Orders) in SAP Web Dynpro apps with a table (grid) or graphical display.
Analytical path framework apps	Lead CE / LoB CE	S4 SS	-	These drill down to influencing data with a mix of tables and charts
Data Analyzer	Lead CE / LoB CE	S4 SS	-	
Review booklets	Lead CE / LoB CE	S4 SS	-	- Aggregated view of business data combining: - Predefined business pages - Analytical components
SAC stories	Lead CE / LoB CE	S4 SS	-	- Use charts, graphs, text, images, and other elements to visualize data - Predefined embedded stories included in license
KPIs and KPI tiles	Lead CE / LoB CE	S4 SS	-	- KPIs can link to generic drill downs or analytical path framework drilldowns
Launchpad app design for embedded analytics	Lead CE / LoB CE	S4 SS	-	- KPI tiles as well as any analytic app can be added to launchpad for frequent access, decide which to include, where for each role
Identify any requirements not met by standard views/queries/reports	Lead CE / LoB CE	-	-	For example: - Additional fields - Combining data from two existing CDS views, etc.
Assess integration				
Review list of applications that will send or receive data to S/4HANA	Lead CE/LoB CE	DDA	-	
Update integrations in Cloud ALM by business process	Lead CE/LoB CE	ALM	Requirements	
Gather detailed requirements for integrations	Lead CE/LoB CE	ALM	Requirements	Consider SAP Integration Solution Advisory Method (ISA-M) May require a workshop or series of workshops by integration
Assess data migration				
Identify extract process for each in-scope data object	Lead CE/LoB CE	-	-	
Confirm data is ready for extract from legacy system	Lead CE/LoB CE	-	-	All cleansing/fixing in legacy system is completed
Initial extract of **master data** from legacy system for migration	Lead CE/LoB CE	-	-	This data once cleansed will be loaded to S/4HANA
After initial extract control data creation or change process in legacy system	Lead CE/LoB CE	-	-	Try to avoid creation of additional data requiring cleansing, two appraoches: - Plan a delta extra later for new data or changed data - Capture new data or changed data in parallel in project documents

Cleansing of master data extracts in it's current format/structure	Lead CE/LoB CE	-	-	De-duplicate, remove unused data, correct missing/incorrect data
Initial extract of **transactional data** for analysis of balances and open items analysis (not for migration at this point)	Lead CE/LoB CE	-	-	Review all balances for accuracy. Review all open items especially old items that may need to be cleared
Assess migration options	Lead CE / LoB CE	S4	Migration cockpit	The migration cockpit includes detailed instructions and upload templates for a wide range of objects. There is also a direct transfer option for SAP source systems.
Where migration cockpit will be used, download the migration object template and review instructions and data structure	Lead CE/LoB CE	S4	Migration cockpit	Templates can be downloaded in XML. They include detailed instructions and field by field descriptions of the S/4HANA format
Identify gaps between legacy system data structure/format etc. and S/4HANA structure/format	Lead CE/LoB CE	-	Migration templates	Identify where mappings and other adjustments are required
Assess testing				
The scope and gaps provide a starting point to identify test requirements. This will be a key input for test planning later.	-	-	-	
Understand test phases and options.	-	-	-	Test phases include: unit, integrated, acceptance, and regression Options include manual testing and automated testing.
Assess end user training requirements				
Consolidate training needs from 'fit-to-standard' workshops	-	-	-	
Gather additional information to idenfity training required	-	-	-	Suggest a core project team workshop and interviews/surveys to key stakeholders, experts and selected users. Training should range from conceptual topics such as 'cloud mindset' to LoB technical process training to future run and operational support model.
Assess run / operation model				
Assess current ERP management model	IT operations	-	-	Topics include: incident management, change management, problem management, service levels, availability, capacity, escalations, provisioning, etc.
Assess best practices for ERP management	IT operations	-	-	
Change and communications management				
Hold detailed change assessment workshops and surveys				Focussing on Prosci ADKAR: - K: knowledge on how to change - A: ability to implement required skills and behaviours
Consolidate change impacts from 'fit-to-standard' workshops and combine with earlier change impacts analysis	Change manager	-	-	
Assess change impacts, prioritise, and identify actions	Change manager	-	-	Led by change manager, consult with experts as needed
Project team change impacts workshops	Change manager	-	-	Everyone on the team is responsible to identify change impacts and build actions into their work to address them, so suggest a project team workshop to review gathered information and discuss actions
Stakeholders discussion on change impacts	Change manager	-	-	The updated change impacts and their actions should be reviewed with stakeholders
Request formal confirmation from stakeholders on 'fit-to-standard' outcome and gap sign off by appropriate LoB expert	Change manager	-	-	
Project and stakeholders management				

Task	Role	Col3	Col4	Notes
Assess benefits vs. 'fit-to-standard' outputs	Project manager	-	-	Have workshops confirmed standard processes 'fit' and will delivery expected benefits. Identify the impact of gaps on the benefit case
Staffing of specialists / developers based on gaps	Project manager	-	-	The nature of gaps may at this stage indicate a need for specific expertise e.g. integration / ABAP / JavaScript etc.
Update project management based on explore (assess)	Project manager	-	-	Check/update scope, resources, budget, timeline etc.
Critical: identify and discuss any gaps that have questionable feasibility with S/4HANA Cloud public	Lead CE / LoB CE	-	-	
Critical: identify any process areas that did not reach clarity during 'fit-to-standard'	Lead CE / LoB CE	-	-	Often a lack of clarity can hide complexities or other challenges: undocumented systems, lack of internal knowledge, etc.
Project management publishes detailed plan for EXPLORE (DESIGN)	Project manager	-	-	

EXPLORE (DESIGN)

Standard processes

Task	Role	Col3	Col4	Notes
For standard processes that were accepted during 'fit-to-standard' formalise these as the future design.	Lead CE / LoB CE	-	-	

Fiori design

Task	Role	Col3	Col4	Notes
Decide whether SAP Mobile Start Up will be used	Lead CE / LoB CE	S4 SS	-	For mobile access to Fiori Apps Requires set up and configuration in SAP Build Work Zone (BTP)
Launchpad design	Lead CE / LoB CE	S4 SS	-	
Design space/page structure for each role	Lead CE / LoB CE	S4 SS	-	This will need to be done in parallel with role design - Typically 1 space per business role with multiple pages - The business role drives the apps that appear and the data access.
'My Home' - decide whether to turn on news	Lead CE / LoB CE	S4 SS	-	SAP recommends RASD news feed as a minimum for release updates
'My Home' - design of 'insights'	Lead CE / LoB CE	S4 SS	-	Tiles are popoulated based on monitoring Apps in business role Users can manually add cards (analytical, list, table, etc.)
App to page design	Lead CE / LoB CE	S4 SS	-	Confirm business roles have all expected apps (via catalog) Design layout of spaces and pages

Responsibility management / situation handling / business workflow design

Task	Role	Col3	Col4	Notes
If requirements were identified in 'fit-to-standard' build designs	Lead CE / LoB CE	S4 SS	-	Design covers teams, team members, tasks, etc.

Embedded Analytics Design

Task	Role	Col3	Col4	Notes
Identify embedded analytics apps for each role/user	Lead CE / LoB CE	S4 SS	-	
Gather detailed requirements for any custom development	Lead CE / LoB CE	S4 SS	-	- Custom CDS views or analytical queries - Fiori app for launchpad based on report - KPI tiles - Visualisations adjusting standard apps
Design any custom changes to embedded analytics				

Design for users and authorisation (testing & production) — Can start when scope is confirmed
Role design and build can take weeks to months, don't leave it late

Task	Role	Col3	Col4	Notes
Build a role matrix to ensure role design is comprehensive and capture complex user - role - catalog - space - page mapping	Lead CE / LoB CE	-	-	A role matrix can document key things linked together: - users, business roles, catalogs, localisations, spaces, pages
Identiy SAP standard roles which fit requirements	Lead CE / LoB CE	-	-	

Design custom business roles for gaps	Lead CE / LoB CE	-	-	Including:
				- Role to catalog design (catalogs control access to data and apps)
				- Role to Fiori space(s) and page(s) design
Check/validate segregation of duties requirements	Lead CE / LoB CE	-	-	SAP roles are designed with this in mind, but should be validated
Check/validate delegation of authority requirements	Lead CE / LoB CE	-	-	
Design role localisation requirements	Lead CE / LoB CE	-	-	Recommended to follow 'minimum possible access principle'
- Localisaiton means restricting access for example by company code				- No standard roles in production
- Plan out detailed restrictions for ALL BUSINESS ROLES				- All roles should be localised (restricted)
Business role to business catalog design	Lead CE / LoB CE	-	-	Business role contains business catalogs which grants permission for apps/data
Business role to space design	Lead CE / LoB CE	-	-	Business role also needs an assigned launchpad space
				- No apps will display if there is no assigned space
				- For custom business roles you need to create custom spaces/pages
Confirm business roles planned for users give all required apps	Lead CE / LoB CE	-	-	
Design integration between corporate identity management and SAP to replicate employees to SAP to become users	Lead CE / LoB CE	-	-	While users are loaded manually for demo and development, the users for test and production should come from employee systems, there are multiple options including:
				1) point to point, 2) BTP master data service, 3) SOAP API
Design for custom developments				*For any of these specific plans are needed for each dev*
Confirm requirements are clear for each gap requiring custom dev	Lead CE/LoB CE	-	-	Requirements should be clear in terms of: process steps, data, report outputs, human interaction etc.
Draft conceptual design	Lead CE/LoB CE	-	-	Create clear conceptual design for process, data, etc. to assist with solution consideration and selection
Investigate solution options				*Generally choose simplest approach*
Check if relevant apps support 'in app' key user extensibility	Lead CE/LoB CE	Fiori app library	-	Fiori App library > more documentation > app extensibility
				Check for business context showing custom fields and custom BAdIs
Check 'in-app' 'runtime authoring' is an option	Lead CE/LoB CE	Fiori apps	-	Adapting UI directly in Fiori apps.
				Examples: move fields, add existing fields from business context etc.
Check 'in-app' developer extensibility options	Lead CE/LoB CE	S4 CAP	-	Developing in Cloud ABAP environment
				Only for released objects and predefined extension points
Check 'side-by-side' low/no code extensibility options	Lead CE/LoB CE	BTP Build	-	
Check 'side-by-side' code extensibility options	Lead CE/LoB CE	BTP BAS	-	
Document design for chosen approach				
Design 'In-App' key user developments	Specialist	-	-	
Design 'In-App' developer developments	Developer	-	-	
Design 'side by side' low/no code developments	Specialist	-	-	
Design 'side by side' code developments	Developer	-	-	
Update ALM	Lead CE / LoB CE	-	-	Up date as and when each gap/development changes status
Update business roles design for custom developments	Lead CE / LoB CE	-	-	
Side-by-side solutions require integration: check prepackaged integration to support side by side build	Developer		Business accelerator	
Design for integration				
Conceptual design for each required integration				Ensure system details, data, and security are clear

	Mapping of IT integration strategy with SAP recommended tools				To avoid proliferation of integration technologies, ensure strategy and principles are clear before going into specific solutions

Consider SAP integration options where relevant				
Start by searching SAP best practice integrations in Signavio	LoB CE	S4	Signavio	Prepackaged integrations. Documented in Signavio (SAP manages these and maintains through releases)
Download set up guide and review pre-requisites and suitability	LoB CE	S4	Signavio	
Set up integration				
Customer-driven integrations using public APIs from accelerator hub or custom developed	Integration lead	Web	Business accelerator	Library of predelivered public APIs SAP/partner managed APIs/integrations/other extensions (Internally managed)
Build design for each system that sends/receives to/from S/4HANA	Integration lead	-	-	
Update business roles design for integration	Integration lead	-	-	
Data migration				
Conceptual design for mappings	Lead / LoB CE	-	-	If legacy system data structures are very different from SAP, and/or SAP is an opportunity to create a new harmonised data model, this mapping may be complex and may require significant thought, and careful alignment and approval
Design for cutover				
Initial high level plan for cutover	Project manager	-	-	Timing, roles, activities, etc.
Organisation design impacts				
The change in processes and roles may require some adjustment to organisation structure. This should be investigated and designed	Project manager	-	-	
Decide if key user/super user/business support specialist concept is relevant. If so design role and identify users.	Project manager	-	-	
Design for run/operate				
Map 'as is' to 'best practices', include:	IT contact	-	-	It's likely many process will change to standard software as a service platform/software as a service processes with SAP
Incident, change, problem management	IT contact	-	-	
Service levels	IT contact	-	-	
Escalations	IT contact	-	-	
Production operation team structure	IT contact	-	-	
Business continuity plans and disaster recovery approach	IT contact	-	-	
Ongoing release udpate strategy	IT contact	-	-	Need to consider standard processes and any custom developments
Post produciton approach to projects, developments, etc.	IT contact	-	-	This topic should include new 'parallel line' versioning approach
Identify change impacts for change to run/operate approach and update change impacts and actions plan	Change manager	-	-	
Preparation for testing (design approach)				
Design approach for tests	Project manager or test manager	-	-	Manual tests vs. automated tests Including unit, integrated, acceptance, and regression tests Testing of business processes, data migration, integrations, roles Development system vs. test system testing Approach to document testing and sign off (including Cloud ALM)
End user training				

Create detailed training plan	Project manager	-	-		This should be very detailed, include topics, audiencies, methods, timing, qualification approach, etc.
Scope of training: general topics + LoB topics	Lead CE / Lob CE				
Audiencies: LoB experts, key users, end users, stakeholders					Consider training needs for different audiences
Training method	Lead CE / Lob CE	-	-		Online/self service, classroom, webinar
Training materials					SAP standard, custom, third party
Training timeline	Lead CE / Lob CE	-	-		Training of accepted standardised processes can start as soon as they are confirmed following 'fit-to-standard' Training for custom processes have to wait until design is complete.
Define training approach for post-go live	Lead CE / Lob CE	-	-		Training for new employees after the project.
Change and communications management					
Design materials required for change impacts and actions	Change manager	-	-		
Communication materials	Change manager	-	-		
Confirm with stakeholders the scope of processes confirmed as standard	Change manager	-	-		
Inform stakeholders about gaps identified and potential solutions	Change manager	-	-		
Project and stakeholder management					
Review gaps and selected designs	Project manager	-	-		Confirm all gaps have a feasible design option selected for build
Assess design impacts on benefits	Project manager	-	-		Update the benefit tracker based on design options
Staffing of specialists / developers based on design options selected	Project manager	-	-		
Update project management based on selected design	Project manager	-	-		Costs, risks, timeline, etc. as needed
Project management publishes detailed plan for next phase	Project manager	-	-		
Project management publishes high level plan for phase after next phase	Project manager	-	-		
REALISE - BUILD					
Phase kick off	Project manager	-	-		
Provision S/4HANA development system					
Provision S/4HANA development system	IT contact	SAP for Me	-		S/4HANA development S/4HANA customising
Prepare CBC for S/4HANA development system					
Create two workspaces in CBC	Lead CE	CBC	-		S/4HANA development system client 80 (development) S/4HANA development system client 100 (customising)
Add team members to workspaces	Lead CE	CBC	-		Initially: Partner LoB CEs, IT contact, customer and partner project managers
Set deployment targets	Lead CE	CBC	-		Assign the workspaces to the target development system clients
Finalise scope and transfer to ALM and CBC:					So far the scope is formally documented in the DDA. This is first transferred to Cloud ALM which is used to manage the implementation. It can be reviewed and formall signed off there. Next it's transferred to CBC to start the build activities.
Confirm DDA has 'fit-to-standard' and other updates	IT contact	DDA	-		
Transfer scope from DDA to ALM:	IT contact	DDA to ALM	-		
Extract scope from DDA to JSON file	IT contact	DDA	Supply chain of selling		DDA > supply chain of selling app > customer assessment > import & expert > export to JSON
Import scope from JSON to project management environment	Lead CE	ALM	Scope app		

Review and validate scope in project management environment:	Lead CE	ALM	Scope app	
Collaborative review with business, IT, and project managers	Lead CE	ALM	Scope app	Ensure all knowledgable parties review scope
Adjustment scope if needed	Lead CE	ALM	Scope app	
Validate and formally sign off scope	Lead CE	ALM	Scope app	Record formal sign off that all processes are captured in Cloud ALM
Transfer scope from project management to configuration environment:	Lead CE	ALM	-	
Extract scope from Cloud ALM to JSON file	Lead CE	ALM		
Import JSON scope file to Central Business Configuration	Lead CE	CBC	-	workspace > define scope > click open > select 'import scope from JSON file > view details, check warnings etc, then import
Configure scope, ledgers, and primary finance settings				
Check/adjust scope bundle selected from upload. Review the processes included in the scope bundle.	Lead CE	CBC	-	Scope & Organisational Structure > Define Scope > Open: 1) Baseline Accelerator: minimum scenarios (mainly finance) 2) Enterprise Management: for large enterprises. 3) Retail bundle: contains scenarios relevant for the retail industry. 4) Public Sector Management
Check/adjust additional processes selected from upload.	Lead CE	CBC	-	To display non-standard/license-dependent items set locked/unlocked filter to all Watchout for caution icon: marks important requirements/implications
Check/add additional countries and regions if required	Lead CE	CBC	-	
Check/add additional languages if required	Lead CE	CBC	-	
Check/add parallel valuation if required	Lead CE	CBC	-	0L is default ledger. 2L can be added for IFRS, 3L for US GAAP, 4G for group valuation. **Important**: cannot be modified later
When scope selection is complete, confirm it	Lead CE	CBC	-	
Loop back and update Cloud ALM with any changes made in above steps	Lead CE	CBC	-	Keep Cloud ALM in sync with CBC
Primary finance settings				
Choose financial statement version (FSV)	Lead CE	CBC		One FSV applies to entire system (all ledgers and company codes)
Choose group currency	Lead CE	CBC		The global currency applies to entire system
Organisation structure				
Set up local entities, for example:	Lead CE	CBC	Organisation structure	Entities required are based on activated scope, country/regions
Company and company codes	Lead CE	CBC		
Sales organisations	Lead CE	CBC		
Plants	Lead CE	CBC		
Set up global entities, for example:	Lead CE	CBC		
Distribution channel, division, purchase organisation, sales office, shipping point, etc.	Lead CE	CBC		
Confirm the organisation entity set up is complete	Lead CE	CBC		
CBC direct deployment				Scope, ledgers, organisation structure, primary finance settings
Deploy CBC defined configuration to S/4HANA development	Lead CE	S/4 D-C		Scope and organisation > organisational structure > deploy (may take hours, check in 'deployment target app'
Verify deployment successful and system accessible	Lead CE			Verify before moving on to LoB configuration

	Task	Role	System	App/Activity	Notes
	Release change requests (transports) for CBC defined configuration in S/4HANA development	Lead CE	S/4 D-C	Export customising transport	CBC deploys the global settings to S/4HANA development, but we still need to release the transorts for the later move to testing/production
	Set project team users up in S/4HANA development:				In development standard roles can be used for general configuration and testing
	Create users for project team in S/4HANA dev		S/4 D-C	Manage workforce app	CSV upload
	Assign project roles for development/customisation		S/4 D-C	Maintain business roles Maintain business users	
	LoB configuration				CBC acts as a hub here, you link into S/4HANA dev
	Identify and work through required configuration points in CBC	LoB CE	CBC	-	Map BDCQ on: BDCQ topic = CBC title, BDCQ SAP ID = CBC ID Use filter bar and search box based on scope
	Complete necessary configurations & add to change requests. Each configuration point in CBC will include a link to a Fiori app to complete the configuration in S/4HANA development system.	LoB CE	CBC	-	Link in title field in CBC launches configuration activities, enter values Use fit-to-standard notes, BDCQ, and Cloud ALM Majority of configuration activities are same/similar to S/4HANA private/on-premise
	Double check all go-live reference 'mandatory' and 'recommended' items have been reviewed and configured	LoB CE	CBC	-	These are where SAP suggests standard values should be validated/changed
	Validate configuration works as expected	LoB CE	CBC	-	
	Update CBC configuration item status from open to complete when changed	LoB CE	-	-	Change configuration status in CBC from open to complete
	Current settings in development system customising client		-	-	
	Complete configuration settings which cannot be transported in S/4HANA development	LoB CE	S/4 D-C	Implementation activities	See list of 'current settings', for example: maintain profit center hierarchy
	Build custom roles:				
	Create localised roles (restricted)	LoB CE	-	Maintain business roles	Two ways to restrict role access: - Add/remove catalogs from a role - Add restrictions within a business role
	Build custom business roles	LoB CE	-	Maintain business roles	Create custom roles and assign business catalogs to them
	Assign custom business roles to Fiori space(s) and page(s)	LoB CE	-		Assign role to space(s) and pages to space(s)
	Create test users in dev system to test custom roles	LoB CE	S/4 D-C	Manage workforce app	CSV upload
	Assign custom roles to test users	LoB CE	S/4 D-C	Maintain business roles Maintain business users	
	Assign launchpad space to users	LoB CE	-		
	Add business role configuration to transport requests	LoB CE	-		
	Start moving from gaps to developments				
	Analyse 'fit-to-standard' gaps and confirm which require custom development	-	-	-	

Task	Role	Tool	Sub-tool	Notes
Track custom development in project management	Lead CE / LoB CE	ALM	-	
Prepare options analysis for each gap/development	Lead CE / LoB CE	ALM		Options should consider: different technical approaches, feasibility, impact analysis, effort analysis, future proofing
Select and approve development approach	LoB expert	ALM	-	
Update mapping of gaps to soluton approach	Lead CE / LoB CE	ALM	-	Solution approaches are: 1) 'In-app' key user, or 'In-app' developer 2) 'Side-by-side' low/no code or 'side-by-side' code-based
Build 'In-App' key user developments (extensions)				Extending released SAP objects
Build 'In-App' key user developments, including for example:	Specialist	S4 D-C		Adjust plan based on in-scope developments
Custom fields/ UI layout	Specialist	S4 D-C	Custom fields app	
Forms and templates - create custom templates	Specialist	S4 D-C	Output Parameter Determination	Form templates define the layouts for PDFs for printing/email etc. Adjust channels, recipients, and templates
Maintain email templates	Specialist	S4 D-C	Maintain email templates	Copy and change standard templates and assign to business processes
Business objects and business logic	Specialist	S4 D-C	Custom business objects/logic	
Build 'runtime authoring'		S4 D-C		Adjust Fiori apps within the app (option when no key user extensibility) Examples: hide fields, add field from business context, move fields around
Create custom apps as a user-interface to another location	Specialist	S4 D-C	Custom tiles app	Create an app to link to an external app or website
Build 'In-app' developer developments (extensions)				
Build more complex extensions and apps	ABAP developer	S4 D-D	S/4HANA Cloud ABAP environment	Approach will depend on topic
Build 'Side-by-side' extensions				
Build side-by-side extensions and apps using low/no code	Specialist	BTP	Build	BTP SAP Build for low/no code: Build Apps, Build Process Automation, Build Work Zone (inlcued in Grow with SAP)
Build side-by-side extensions and apps using code	Developer	BTP	Business Application Studio	BTP SAP Business Application Studio for Java, JS, Python, etc. development with Cloud Application Programming Model
Build integration required for any side-by-side extensions	Developer	BTP		Depends on integration approach
Unit test development in S/4HANA development	Lead CE/ LoB CE	-	-	
Create compliance plan for custom developments	Lead CE/ LoB CE	-	-	Data extensions are outside of SAP delivered compliance e.g. data protection
Create operations plan for custom developments	Lead CE/ LoB CE	-	-	Management approach including release upgrade testing etc.
Prepare country localisation in CBC (if in scope)				
Set up countries not covered by best practices if required	Lead CE	CBC	Configuration localisation tool	Copy SAP delivered local country to customer localisation country. If a country not covered by best practices is required, start by copying business processes from a country with best practices to the target country.
Identify SAP delivered local versions required	Lead CE	Signavio	-	Note public cloud covers 60 standard local versions, 31 languages
Activate SAP local versions in CBC	Lead CE	CBC	-	Also update Cloud ALM
Identify customer local versions required	Lead CE		-	Identify any countries required not covered by SAP
Create customer local version (start from copy of SAP country	Lead CE	CBC	configuration localisation tool	
Create organisation structure for customer local version	Lead CE	CBC	-	

Deploy localisations to S/4 HANA dev	Lead CE	CBC	-	
Fiori Build				
Create custom space and page(s) for custom business roles	Lead CE / LoB CE	S4 D-C	-	Each standard role has a standard space template
Configure SAP mobile start app	Lead CE	BTP	SAP Build Work Zone	Customer IT contact provides permissions for Build Work Zone (it's on BTP)
Customise Fiori access if required	Lead CE / LoB CE	S4 D-C	Maintain Business Roles	Two methods: - Add/remove catalogs from business roles - Add restrictions to business roles
Build for special topics (if in scope)				
Responsibility management				Responsibility managemnet (1NJ) in Signavio For example define approval flow for purchase req.
Create and manage teams	LoB CE	S4 D-C	Manage teams and responsibilities	
Create and manage responsibility definitions	LoB CE	S4 D-C		
Create and manage team member functions	LoB CE	S4 D-C	Process specific workflow apps	
Add workflow, define preconditions	LoB CE	S4 D-C	Process specific workflow apps	
Situation handling				Situation handling (31N) in SAP Signavio Automatically inform users about situations requiring attention
Identify which situation handling templates are relevant (per LoB)	LoB CE	S4 D-C	-	
Identify which are enabled by default, and which not	LoB CE	S4 D-C	-	
Decide if any not enabled by default should be enabled	LoB CE	S4 D-C	-	
Gather necessary information	LoB CE	S4 D-C	-	
Building teams	LoB CE	S4 D-C	-	
Adding members	LoB CE	S4 D-C	-	
Defining tasks (member functions)	LoB CE	S4 D-C	-	
Business Workflow				
Review existing workflow scenario templates	LoB CE	S4 D-C	-	
Match to requirements in fit-to-standard	LoB CE	S4 D-C	-	
Create or maintain custom approval:	LoB CE	S4 D-C	-	
Open function-specific workflow app	LoB CE	S4 D-C	-	
Adjust work items/tasks/agent assignment	LoB CE	S4 D-C	-	
Decide on whether SAP Build Process Automation Is Needed	LoB CE	S4 D-C	-	Part of Grow with SAP, runs on BTP, low/no-code workflow Combines traditional workflow and robotic process automation
Intelligent scenarios				
If an LoB has an intelligent scenario that is required, these need to be set up by LoB CE in S/4HANA development	LoB CE	S4 D-C	-	Check set-up instructions in SAP Signavio Process Navigator
Build for Embedded Analytics				
Copy and customise existing CDS views/analytical queries in S/4HANA development customising client	Lead/LoB CE	S4 D-C	Custom CDS views Custom analytical queries	Copy from standard and adjust, or create from scratch Example: create a custom analytical query from a CDS view

	Create custom KPIs, reports, SAC stories if required	Lead/LoB CE	S4 D-C	Manage KPIs and reports app	
	Create custom launchpad apps for embedded analytics apps	Lead/LoB CE	S4 D-C	Manage KPIs and reports app	Assign app to custom business catalog, assign catalog to business role Add app to launchpad page (mapped to the business role)
Build for integrations					
	For SAP best practices integrations - typical steps:				
	Prerequisites: access to systems	LoB CE	-		
	Prerequisites: authorisations	LoB CE	-		
	Set up communication users	LoB CE	S4 D-C	Maintain communication user	For authentication when sending/receiving messages
	Set up communication user authentication	LoB CE	S4 D-C	-	Password or certificate/token based
	Create communication system	LoB CE	S4 D-C	Maintain communication system	Inbound or outbound
	Create communication arrangement	LoB CE	S4 D-C	-	
	For customer-driven integrations				
	Follow guides based on selected approach	LoB CE/specialist			Set up is specific to the API chosen
	Familiarise and set up monitoring in Cloud ALM	LoB CE	ALM	Various	Landscape management and external API management apps. Capabilities include: Business Process Monitoring, Integration & Exception Monitoring, User & Performance Monitoring, Job & Automation Monitoring, Configuration & Security Analysis, Health Monitoring, Business Service Management, Intelligent Event Processing
Build for data migrations					
	Use conceptual mapping design to update mapping in S/4HANA	LoB CE	S4 D-C	Migration cockpit	Mapping can be entered directly in Migration Cockpit, or an excel template can be downloaded, filled in, then uploaded
Testing					
	Regression testing for release upgrades during implementation				Release upgrades will be applied during project (at least one)
	Set up test process automates in test tool in parallel with configuration	Lead CE/LoB CE	-	-	
	During release upgrade pause work and re-test already validated items	Lead CE/LoB CE	-	-	Check release upgrade did not impact any already unit tested items
	Unit testing in development				
	Create unit test list	Lead CE/LoB CE	-	-	Easily created based on scope + configuration points + custom developments
	Execute unit tests in development system where possible	Lead CE/LoB CE	-	-	Where sufficient data exists unit test in development
Change request 'transports' management					The CR/transport system will be used to move from dev to test
	Check/validate all CBC direct configurations CRs are tracked	PM	S4 D-C	-	CBC deployed these to dev, but they will move to test with CRs
	Check/validate all LoB configuration CRs are tracked	PM	S4 D-C	-	These are managed with CRs
	Check/validate all custom development CRs are tracked	PM	S4 D-C	-	These are managed with CRs
Training delivery					
	In parallel with build training delivery can start on concepts and standard processes etc.	Training lead	-	-	
Change and communications management					

Task	Role	System		Notes
Regular updates with stakeholders on change impacts	Change manager	-	-	
Update stakeholders on progress of build of developments selected	Change manager	-	-	
Update stakeholders on training results	Change manager	-	-	
Project and stakeholder management				
Check benefits vs. devleopment build	Project manager	-	-	
Stakeholder updates during build	Project manager	-	-	Topics to cover: - Progress on change impacts (comms, training, developments)
GO / NO GO for REALISE (BUILD TEST SYSTEM)	Project manager	-	-	Check: - Core build (standard processes) - Custom roles - Custom developments
PM publishes high level plan REALISE (BUILD TEST SYSTEM)	Project manager	-	-	
REALIS - BUILD TEST SYSTEM				
Phase kick off	Project manager	-	-	
Provision and configure S/4HANA test system for testing				
Provision S/4HANA test system	IT Contact	SAP for Me		
Build test system - move change requests/transports from development to test systems	IT Contact	S4 D	-	Transports for basic configuration, roles, developments etc. all need to be moved to the test system and checked. This may be a big effort with a lot of transports. Use 'execute' option in 'release' drop down menu Note: transport has to be assigned to you to transfer
Validate test system configuration	Lead CE LoB CE	S4 T	-	It's common to encounter problem in UAT due to missing or forgotten transports, so this should be carefully checked
Configure current settings, for example:			-	Current settings are settings which cannot be transported, these are therefore manually done in the test system. Several examples are listed. These also need to be manually set up in production later.
Maintain Default Profit Center	Lead CE LoB CE	S4 T	-	
Maintain Profit Center Standard Hierarchy	Lead CE LoB CE	S4 T	-	
Create Bank Master Data for House Banks	Lead CE LoB CE	S4 T	-	
Define House Banks	Lead CE LoB CE	S4 T	-	
Create Bank Accounts in Cash Management	Lead CE LoB CE	S4 T	-	
Maintain Check Lots	Lead CE LoB CE	S4 T	-	
Maintain Business Partner Representing Supplier Company Code for Intercompany	Lead CE LoB CE	S4 T	-	
Maintain Consolidation FS Items	Lead CE LoB CE	S4 T	-	
Maintain Stock Transfer Supplier BP	Lead CE LoB CE	S4 T	-	
Maintain PSM Master Data for Material Stock Postings	Lead CE LoB CE	S4 T	-	
Maintain PSM Sponsored Class Master Data for G/L Account Classification	Lead CE LoB CE	S4 T	-	
User accounts, roles, and authorisations in S/4HANA test system	Lead CE LoB CE	S4 T	-	
Business roles and authorisation build in S/4HANA test system				Test system approach: No standard roles, test real roles
Confirm role matrix complete and signed off	Project manager			As a basis for successful testing ensure that the users set up match real roles and these have the correct restricted access to apps and data as they will need in production.

Task	Role	System	Tool	Comments
Confirm custom role developments and localisation complete	Lead CE / LoB CE			
No standard roles in test/prod: Create custom roles & localise				No standard 'wide' access, all access to be minimised Tip: this can take weeks - months depending on project size
Create business roles	Lead CE / LoB CE	S4 D	Maintain business roles	Suggest to build in restrictions to naming - Example: add company code, plant, etc. to role name
Adjust access categories for roles	Lead CE / LoB CE	S4 D	Maintain business roles	SAP recommends all roles are set to 'restricted' and apply restrictions
Assign business catalog to roles	Lead CE / LoB CE	S4 D	Maintain business roles	Business catalogs control access to apps and data
View and maintain restrictions	Lead CE / LoB CE	S4 D	Maintain business roles	Define restrictions for every field e.g. select company codes
For all roles check/adjust assigned launchpad space(s)	Lead CE / LoB CE	S4 D	Maintain business roles	
For all launchpad space(s) check/adjust assigned page(s)	Lead CE / LoB CE	S4 D	Maintain launchpad spaces	Edit pages to add/remove apps and change how they are displayed
Transport business role configuration to test system	Lead CE	S4 D	-	
Create users in S/4HANA test system	Lead CE	S4 T	-	
Connect IAS to corporate identity provider (IdP)	Developer	IAS / IdP	-	The set up of this may require a stand alone project. The idea is to base the users in S/4HANA test and production on the actual employees from the employee identity management system.
Replicate users to IAS using selected integration solution	IT Contact	IAS / IdP	-	Options: point to point/BTP master data service/SOAP
Assign business roles to users	Lead CE	S4 T	Maintain business roles Maintain business users	
Assign launchpad space to users	Lead CE	S4 T	-	
Activate users	Lead CE	IAS	-	Download from S/4HANA testing and upload to IAS to send activation
Data migration to test system for testing				
Define scope of data migration for testing	Project manager	-	-	Classicaly only a subset of data is used for user acceptance testing. At minimum a variety of data to test all processes. Full data migration can be tested in a trial cutover test. However, if a trial cutover test is not planned, it may be sensible to load all data for UAT
Finalise/update templates and mappings from design phase	Lead CE / LoB CE	-	-	
Execute main master data migration	Lead CE / LoB CE	-	-	(limited or full scope depending on strategy)
Execute any delta master data migration	Lead CE / LoB CE	-	-	(only if aiming for full scope)
Reconcile master data migration	Lead CE / LoB CE	-	-	Reconcile that intended master data was correctly loaded
Balances and transactions migration	Lead CE / LoB CE	-	-	If no trial cutover planned it may be worthwhile to test balance and transaction migration as part of UAT, but this should not hold up UAT testing (it can be loaded in a different period).
Balance sheet: transfer opening balances	Lead CE / LoB CE	-	-	
Balance sheet: transfer open items	Lead CE / LoB CE	-	-	
Transfer P&L account line items or balances (for mid-year cutovers)	Lead CE / LoB CE	-	-	
Reconcile financial balances and transactions	Lead CE / LoB CE	-	-	Requires 100% reconciliation and no errors before production migration
Change and communications management				

Continue to capture change impacts as they emerge	Change manager	-	-	
Implement change actions based on change impact assessments	Change manager	-	-	Actions are highly specific to change impacts
Liase with configuration experts and IT on build status and challenges encountered	Change manager	-	-	
Project and stakeholder management				
Project management and stakeholder updates	Project manager	-	-	
GO / NO GO for REALISE (TEST)	Project manager	-	-	Check: - Test system ready for UAT
PM publishes detailed plan for next phase	Project manager	-	-	
REALISE - TESTING IN S/4HANA TEST SYSTEM				
Training/onboarding for test automation tool	Project manager			Used primarily for acceptance tests and regression tests
Prepare automated tests				
Choose / set up automated tests for standard processes	LoB CE/Lead CE	-	Manage Your Test Processes	Detailed steps on SAP Help
Choose / set up automated tests for custom processes	LoB CE/Lead CE	-	Manage Your Test Processes	Detailed steps on SAP Help
Choose / set up automated tests for post ugprade tests	LoB CE/Lead CE	-	Manage Your Test Processes	Detailed steps on SAP Help
Run automated tests	LoB CE/Lead CE	-	Manage Your Tests	
Review automated tests results	LoB CE/Lead CE	-	Analyse automated test results	
Prepare unit and integrated tests				
Define approach for unit tests and integrated tests in test systems	Project manager	-	-	SAP documentation does not treat these too formally, however in my experience if team members miss unit or integrated tests it can lead to a lot of issues in acceptance testing, so recommended formal identification and tracking of these.
Prepare list of unit tests for test systems	LoB CE/Lead CE	-	-	Ideally majority of unit tests are done in development - customising, however some unit tests may require higher quality or more extensive data only available in test systems
Prepare list of integration tests (SAP refers to them as string tests)	LoB CE/Lead CE	-	-	Integration tests are where several steps/tasks are tested in a chain to test integration across processes Example: chain from purchase requisition through to payment
Formal confirmation that unit and integrated tests pass	LoB CE/Lead CE	-	-	Ensure project team members formally sign off and commit to all their unit and integrated tests being completed. This is critical to ensure a smooth acceptance test.
Create LoB experts in Cloud ALM	LoB CE/Lead CE	Cloud ALM	-	For test tracking
Prepare user acceptance tests				
Create test cases	LoB CE	Cloud ALM	Cloud ALM test managemnet	Ensure test cases cover business roles: test authorisation, localisation, segregation of duties, delegation of authority etc. Ensure test cases cover custom developments
Assign test cases to test plans	LoB CE	Cloud ALM		
Assign test plans to testers	LoB CE	Cloud ALM		

Task	Owner	Col3	Col4	Notes
Invite LoB experts to UAT (share timing, meetings etc.)	LoB CE			
Run training for testers (LoB experts & others nominated)				Potentially key users/super users if relevant too
Online training	Lead CE / LoB CE	-	-	
Classroom training	Lead CE / LoB CE	-	-	
Test / qualify LoB experts as ready for UAT	Lead CE / LoB CE	-	-	Online and classroom trainings can include assessment to test knowledge levels
Run testing				
Unit and integrated tests				Tests by LoB CE to ensure system works as designed
Execute remaining unit tests which required S/4HANA test environment	Lead CE / LoB CE	**-**	**-**	
Execute integration (string tests in SAP terms)				
User acceptance tests	Lead CE / LoB CE	**-**	**-**	
LoB expert carries out testing	LoB Expert	S4 Test		
Customer LoB document formal sign-off on test cases.	LoB Expert	Cloud ALM		
Document any role issues and resolutions for production deployment	LoB Expert	-		
Change and communications management				
Continue to capture change impacts as they emerge	Change manager	-	-	
Implement change actions based on change impact assessments	Change manager	-	-	Actions are highly specific to change impacts
Survey for feedback on testing, and identify readiness issues	Change manager	-	-	Recommend change manager to sit in on some test sessions to gauge various factors: knowledge levels, comfort levels, etc.
Project and stakeholder management				
PM publishes detailed plan for next phase	Project manager	-	-	
Phase specific project management and stakeholder updates	Project manager	-	-	

REALISE - CUTOVER TEST

Task	Owner	Col3	Col4	Notes
Plan trial cutover				I haven't seen trial cutover explicitly planned in SAPs methodology, this may be a reflection of the capabilities of the migration cockpit. However, for projects with large data migrations, it may still be worthwhile planning this phase. Suggest to consult with SAP.
Create ordered plan of cutover steps with owners	Project manager	-	-	
Identify reconciliation steps, reports, and owners	Lead CE / LoB CE	-	-	
Identify rollback appraoch in case of errors	Lead CE / LoB CE	-	-	
Identify cutover system approach	Lead CE / LoB CE	-	-	Consult with SAP, potentially: - Refresh test system from UAT - Request sandbox system - Either may involve additional costs
Execute trial cutover				
Load full volume of master data	Lead CE / LoB CE	-	-	
Reconcile master data	Lead CE / LoB CE	-	-	
Load balances for all relevant accounts	Lead CE / LoB CE	-	-	
Reconcile balances	Lead CE / LoB CE	-	-	
Load open items for open item managed accounts	Lead CE / LoB CE	-	-	
Reconcile open items	Lead CE / LoB CE	-	-	
Load P&L balance/line items in the case of mid-fiscal cutover	Lead CE / LoB CE	-	-	

Reconcile P&L	Lead CE / LoB CE	-	-	
Overall reconcilaition - compare trial balance from S/4HANA to legacy ERP	Lead CE / LoB CE	-	-	

Project and stakeholder management

GO / NO GO for production cutover	Project manager	-	-	Check: - status of trial cutover

REALISE (PRODUCTION)

Prepare for production start up

Create production cutover plan	Project manager	-	-	If a trial cutover was held, use this plan as a baseline and adjust based on lessons learned

Provision and configure S/4HANA production system

Provision S/4HANA production system	IT Contact	S4 P	-	
Move change request transports from S4/HANA development to S/4HANA production	Lead CE	S4 D to S4 P	-	Ensure transport list is adjusted to resolve any issues encountered during the test system set up.
Configure current settings in S/4HANA production	Lead CE / LoB CE	S4 P	-	See example list from test phase

Roles and authorisation design for S/4HANA production system — Production system approach: No standard roles, test real roles

Follow the same steps as for the test system	Lead CE / LoB CE	S4 P	-	

Support model

Design stabilisation period support model	Project manager	-	-	Recommendations: - Use business as usual incident reporting/tracking from day 1 - Project team supplements support team during 1st month
Plan activities and timing to handover from stabilisation support to business as usual support	Projecdt manager / IT managers	-	-	
Implement staffing/role changes in operations team if required	Team managers			

Training for operation teams and managers (end users + more) — Broad audience of all end users and other relevant parties. If relevant identify/add key users/super users in delivery

Publish online training	Lead CE / LoB CE	-	-	
Deliver classroom training	Lead CE / LoB CE	-	-	
Include tests to qualify individuals as ready for production	Lead CE / LoB CE	-	-	
Go/no go for data migration	Project manager	-	-	

Data migration — Production system approach: No standard roles, test real roles

Finalise/update templates and mappings from test phase	Lead CE / LoB CE	-	-	
Execute main master data migration	Lead CE / LoB CE	S4 P	-	
Execute delta master data migration	Lead CE / LoB CE	S4 P	-	Delta covers data from initial extract to cutover date
Reconcile master data migration	Lead CE / LoB CE	S4 P	-	Requires 100% reconciliation and no errors before production migration
Open posting periods for balances and transactions migration	Lead CE / LoB CE	S4 P	-	Usually a special period

Balances and transactions migration | Lead CE / LoB CE | S4 P | - | |

Balance sheet: transfer opening balances	Lead CE / LoB CE	S4 P	-	
Balance sheet: transfer open items	Lead CE / LoB CE	S4 P	-	
Transfer P&L account line items or balances (for mid-year cutovers)	Lead CE / LoB CE	S4 P	-	Depends on cutover timing
Reconcile financial balances and transactions	Finance	S4 P	-	Requires 100% reconciliation and no errors before production migration
Formal finance sign off that accounts align across systems	Finance	S4 P		
Close posting periods for migrated balances and transactions	Lead CE / LoB CE	S4 P		These should never be modified after reconciliation
Go/no go for production postings	Project manager	-	-	

Production start up					
	Post trial transctions	Operation teams	S4 P	-	Post first transactions for key processes with project team present and monitoring
	Incident management starts	Support teams	-	-	Suggest to use business as usual process, tools, team, but have project team supplement/support them
	Project team support during stabilisation period		-	-	Recommended until after 1 month end is complete
	Incidents related to project work assigned to project team and tracked / closed before closeout	Various	-	-	
	Change requests relaed to features not in scope go into business as usual change management process	Various	-	-	
	Ramp up to full transcaction volume posting / normal operations	Operation teams	S4 P	-	
	Daily reporting of production start up process	Project manager	-	-	Include: posting metrics, issues, change requests
	Month end closing and reporting	Finance	S4 P	-	
	Closeout of all open issues	Project team	-	-	
Close out					
	Review of project outcomes vs. acceptance criteria / expected benefits	Project manager	-	-	
	Project closeout meeting	Project manager	-	-	
	Handover support to business as usual operating model	Operations	-	-	