ERP Data Migration Checklist

This checklist is designed for:
ERP program managers, solution architects, data leads and technology leaders responsible for planning and delivering ERP data migrations.

ERP data migration is one of the most complex forms of enterprise data migration. ERP platforms sit at the centre of business operations, connecting finance, supply chain, manufacturing, sales and HR into a single operational backbone. When ERP data migration goes wrong, the impact is immediate and felt across the organisation.

This ERP data migration checklist addresses the specific challenges of migrating data across major enterprise platforms including SAP, Oracle E-Business Suite, Microsoft Dynamics and NetSuite. It focuses on the areas that carry the most risk: master data quality, business process continuity and disciplined testing.

Whether you are upgrading to SAP S/4HANA, implementing a new ERP platform or consolidating multiple systems, this checklist is designed to help teams plan and execute ERP data migration with confidence.

What Makes ERP Data Migration Unique

ERP directly underpins how your organisation operates day to day. They run critical processes such as order-to-cash, procure-to-pay and financial close. So, there's little tolerance for error or downtime.

Master data accuracy is business-critical. Customer, vendor, product and financial master data must be correct before transactions can function as intended. ERP platforms also integrate with dozens of upstream and downstream systems including CRM, e-commerce, warehouse management and banking platforms. These create complex dependencies that must be managed carefully.

Data volumes are typically large and highly relational, often spanning many years of transactional history. Testing therefore extends beyond data accuracy to full end-to-end business process validation. These factors demand specialised ERP data migration approaches, which this checklist addresses in detail.

Your Complete ERP Data Migration Checklist

ERP data migrations demand close coordination between IT and business stakeholders, disciplined master data management and comprehensive testing of end-to-end business processes. This checklist provides a structured approach to managing that complexity and reducing delivery risk.

Discovery and Planning

Successful ERP data migrations begin with a clear understanding of what data exists and how it supports business processes. Understanding this foundational layer helps you identify and resolve quality issues before they derail the migration.

Inventory all master data sources: Identify customer, vendor, product, financial and employee master data across the ERP landscape.

Map business processes to data: Link core business processes to the underlying data elements they depend on.

Assign data ownership: Identify clear data owners for each master data domain.

Assess current data quality: Identify duplicates, incomplete records and inconsistencies across master and transactional data.

Document ERP modules in scope: Confirm which modules are included, such as finance, supply chain, manufacturing and HR.

Map integrations and interfaces: Document all upstream and downstream systems connected to the ERP.

Define migration scope and approach: Determine whether migration will be phased by module or executed as a single cutover.

Establish data governance: Define approval processes for data cleansing, transformation and migration decisions.

Develop the ERP migration plan: Build a detailed project plan covering milestones, dependencies and cutover activities.

Define success criteria and KPIs: Agree measurable outcomes covering data quality, process continuity and system performance.

SAP Data Migration

SAP migrations require specialised handling due to platform complexity and deep integration with core business processes. This applies to both SAP S/4HANA upgrades and new SAP implementations.

SAP S/4HANA readiness

Run SAP Readiness Check: Assess system compatibility, add-on impacts and required remediation.

Review the SAP Simplification Item List: Identify data model changes and removed or altered functionality.

Plan data model transformation: Define how legacy structures will map to the S/4HANA data model.

Assess custom ABAP impact: Identify custom code that affects or depends on migrated data.

Prepare standard object migration: Use SAP Migration Cockpit for supported object migrations where applicable.

SAP data migration execution:

Extract data using SAP-approved tools: Use Migration Cockpit or approved third-party tools where appropriate.

Map legacy data to SAP target structures: Document transformation rules and validation logic.

Migrate master data first: Load material, customer and vendor master data before transactional data.

Configure organisational structures: Ensure company codes, plants, sales organisations and controlling structures are in place before data load.

Load transactional data: Migrate open orders, inventory balances and financial balances in the correct sequence.

Validate SAP business rules: Confirm valuation, pricing, credit and other SAP-specific controls behave as expected.

Test integration points: Validate interfaces using IDocs, RFCs and BAPIs.

Perform cutover rehearsals: Execute full SAP cutover rehearsals including system lock and unlock procedures.

Australian SAP considerations:

Validate GST configuration: Confirm tax codes and GST treatment align with Australian requirements.

Confirm ABN handling: Ensure correct handling of ABNs in customer and vendor master data.

Validate banking formats: Confirm support for Australian payment file formats (for example ABA files) and correct handling of BSB numbers.

Confirm APRA reporting requirements (where relevant): Address reporting and data retention obligations for regulated industries.

Master Data Migration

Master data quality determines ERP success long after go-live. Poor master data creates operational friction that's difficult and costly to undo. Here's how to approach your master data.

Cleanse customer master data: Deduplicate records and standardise names, addresses and identifiers.

Cleanse vendor master data: Validate payment terms, tax information and banking details.

Standardise product and material master data: Align descriptions, classifications and units of measure.

Validate financial master data: Confirm chart of accounts, cost centres and controlling structures are accurate and complete.

Establish master data governance: Define clear ownership and accountability for each master data domain.

Define master data standards and validation rules: Agree naming conventions, mandatory fields and validation controls.

Create master data in the correct dependency sequence: Load master data in the order required to support transactional processing.

Obtain business approval before migration: Secure formal sign-off that master data is fit for use.

Plan post-migration master data maintenance: Define ongoing processes for creation, change control and data quality monitoring.

Testing and Validation

ERP testing must validate entire business processes, not just data accuracy.

Develop end-to-end test scenarios: Define scenarios covering core processes such as order-to-cash and procure-to-pay.

Perform module-level testing: Execute unit testing within each ERP module to validate data and configuration.

Execute integration testing: Validate data flows and process continuity across connected systems.

Conduct user acceptance testing: Involve business users to confirm processes function as expected.

Test financial close processes: Validate month-end and year-end close activities, postings and reconciliations.

Validate reporting and analytics: Confirm reports, dashboards and analytics reflect accurate and consistent data.

Reconcile migrated data: Validate balances, totals and key control figures between source and target systems.

Conduct volume and performance testing: Confirm the ERP performs under expected transaction volumes and peak loads.

Execute cutover rehearsals: Perform full dress rehearsals including rollback procedures and decision checkpoints.

Document defects and residual risks: Record issues, resolutions and any accepted risks prior to go-live.

Go-Live and Cutover

During go-live, the goal should be to minimise disruption and protect business continuity. This requires disciplined coordination across IT and business teams.

Lock source systems: Prevent late changes and ensure data consistency during final migration.

Execute final production data migration: Run the approved production load according to the cutover plan.

Reconcile go-live data: Validate balances, totals and key control figures immediately after migration.

Enable integrations in sequence: Bring interfaces online in the correct order to avoid downstream failures.

Monitor initial transactions closely: Track early transactions to identify issues quickly.

Provide hypercare support: Maintain heightened support coverage during the immediate post-go-live period.

Capture lessons learned: Document issues, decisions and improvements for future phases or rollouts.

Plan legacy ERP decommissioning: Define timelines and controls for retiring legacy systems once stability is confirmed.

Common ERP Data Migration Challenges and Solutions

ERP migrations introduce predictable risks that must be managed proactively to protect business continuity.

Master data quality

Problem: Duplicate customers, inconsistent product data and incomplete master records.

Mitigation:

- Business-led master data cleansing.
- Clear governance frameworks.
- Automated validation controls.

Business process continuity

Problem: ERP downtime directly disrupts day-to-day operations.

Mitigation:

- Phased migrations.
- Parallel runs.
- Rehearsed cutovers.
- Extended local support during go-live.

Integration complexity

Problem: ERP platforms connect to multiple dependent systems across the enterprise.

Mitigation:

- Comprehensive integration testing.
- Staged interface enablement.
- Active monitoring post cutover.

Related Data Migration Resources

- **Data Migration Framework:**
  Strategic guidance for complex programs.
- **Data Migration Checklist Library:**
  Cloud, legacy and ERP-specific checklists.
- **Database Migration Checklist:**
  For ERP projects involving database modernisation

Planning an ERP implementation or upgrade?

Interactive's data migration services support Australian enterprises with certified professionals experienced in SAP, Oracle and Microsoft Dynamics migrations. We deliver proven methodologies and 24/7 Australian-based support.

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