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OpenText VIM Upgrade Readiness Checklist for SAP S/4HANA | 2026

Key considerations to minimize surprises and prepare for a smoother upgrade.

February 2026

Prepared by Ecodocx

OpenText expertise. From planning to implementation and beyond.

Introduction

Planning an SAP S/4HANA migration or RISE with SAP journey? Use this checklist to assess your existing OpenText Vendor Invoice Management for SAP (VIM) environment, identify potential upgrade requirements, and prepare for a smooth transition.

Over the years, Ecodocx has supported organizations ranging from mid-sized businesses to Fortune 500 enterprises through complex SAP transformation projects, helping them upgrade, migrate, and optimize their OpenText VIM and OCR solutions. Drawing on our hands-on experience across these projects, we've compiled key lessons, technical considerations, and potential challenges into this practical checklist.

Who should use this checklist? SAP project managers, IT leaders, SAP Basis teams, and OpenText VIM administrators planning or preparing for a RISE with SAP or SAP S/4HANA migration or upgrade.

What You'll Find Inside

This checklist covers the critical technical, functional, and project-planning considerations for preparing OpenText VIM for SAP S/4HANA. Key topics include:

- Technical and functional readiness
- Software and system compatibility
- Current environment assessment and optimization opportunities
- Product evolution and modernization considerations
- Migration planning and risk mitigation
- Testing, validation, and user adoption

It also highlights important dependencies between SAP and OpenText components that can significantly impact upgrade complexity, project timelines, and overall readiness. Use it to identify potential risks, assess your current environment, and ensure critical VIM upgrade activities are accounted for in your SAP transformation plan.

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1. Licensing & Software Versions

- ☐ **Verify software licenses and SKUs.** If VIM licenses were purchased through SAP, confirm with your SAP account executive whether the license SKU needs to be updated for SAP Maintenance Planner (e.g., SAP Invoice Management by OpenText for ECC vs. SAP Invoice Management for SAP S/4HANA by OpenText).
- ☐ **Review existing OpenText software versions.** Identify the current versions of VIM, OCR/data capture solutions (ICC, BCC, Captiva, Intelligent Capture/Core Capture), and Archive Center (sold as part of Archiving and Document Access for SAP or Extended ECM for SAP)
- ☐ **Confirm available software updates.** Check the SAP Software Download Center for SAP-purchased licenses or the OpenText Support Portal for OpenText-purchased licenses.

2. Target Landscape & Compatibility

- ☐ **Assess future landscape compatibility.** Review compatibility between your planned SAP S/4HANA release, deployment model, and all relevant OpenText components.
- ☐ **Identify required upgrades.** Determine which OpenText components need to be upgraded, replaced, or reconfigured to support the target landscape.
- ☐ **Review SAP and OpenText dependencies.** Confirm that all required SAP components and prerequisites are included in the migration plan.

3. Existing VIM Environment Assessment: Document your current VIM setup. Review document ingestion channels (email, fax, paper, EDI, etc.), OCR, archiving, notifications, dashboards, reports, status updates, workflows, and configurations.

- ☐ **Identify customizations and external processes.** Review processes currently handled outside VIM or through custom development.
- ☐ **Evaluate opportunities to simplify.** Determine whether existing custom processes can be replaced with standard functionality available in newer VIM releases, supporting an SAP Clean Core approach.
- ☐ **Capture baseline performance metrics.** Document current processing performance, known issues, and outstanding OpenText Support tickets.

4. Product Features & Functional Changes

- ☐ **Review the latest release notes.** Identify new features, deprecated functionality, and changes that may affect your existing solution.

- ☐ **Evaluate SAP GUI and Fiori options.** Assess the impact of moving to SAP S/4HANA Fiori applications.
- ☐ **Review OCR modernization opportunities.** Evaluate migration from legacy OCR solutions (ICC/BCC) to Intelligent Capture for SAP or Core Capture for SAP.
- ☐ **Review Archiving modernization opportunities.** Evaluate migration from Archiving and Document Access for SAP to Core Archive for SAP.
- ☐ **Assess process improvements.** Review line-item handling, Matching & Automation, reporting, regional settings, and other relevant VIM capabilities.

5. Upgrade Planning & Data Protection

- ☐ **Align the VIM upgrade with the SAP S/4HANA project timeline.** Include sufficient time for landscape build-out, software upgrades, improvement activities, and technical and user acceptance testing.
- ☐ **Confirm technical prerequisites.** VIM consists of OpenText add-ons implemented within SAP. Upgrade activities can begin only once the relevant SAP S/4HANA components are configured and available.
- ☐ **Assess upgrade complexity.** Consider your current VIM version, as older releases may require more extensive upgrade activities.
- ☐ **Back up VIM data.** Ensure appropriate backups are completed before migration and upgrade activities begin.

6. Testing & Change Management

- ☐ **Assign a dedicated testing team.** Identify business and technical resources responsible for preparing test cases, test data, and validating results.
- ☐ **Prepare realistic test scenarios.** Cover end-to-end invoice processing and other business-critical document workflows.
- ☐ **Plan sufficient OCR testing.** When migrating to or implementing Intelligent Capture/Core Capture, conduct multiple test runs using a diverse set of representative sample invoices.
- ☐ **Develop a change management strategy.** Prepare users for process changes, new functionality, and any transition from SAP GUI to Fiori.

Need help? Ecodocx is a trusted OpenText services leader and an industry legend, backed by 20+ years of delivery excellence. OpenText VIM services — from initial assessment through implementation and post-upgrade managed support.

Learn more about Ecodocx OpenText VIM services | ecodocx.com/contact