

# ERP requirements workbook

A neutral template for comparing ERP options

Record the operational evidence behind each decision before you compare platforms or accept a proposal.

## Requirements

- **Requirements and priorities:** What must work in the first release?
- **Users and roles:** Which roles create, approve or view records?
- **Integrations and data migration:** Which systems and historical data are in scope?
- **Reporting, compliance and security:** Which reports, controls and security rules apply?
- **Hosting, ownership and support:** Who owns hosting, data, updates and support?
- **Budget, timeline and vendor questions:** What is included, excluded or dependent on readiness?

## Scorecard

Score each platform from 1 to 5 only after you have evidence for the criterion.

- Workflow fit: \_\_\_\_\_ / 5
- Data and integration fit: \_\_\_\_\_ / 5
- Security and compliance: \_\_\_\_\_ / 5
- Operating model: \_\_\_\_\_ / 5
- Delivery risk: \_\_\_\_\_ / 5

## Vendor questions

1. Which requirements are standard configuration, modules, integrations or custom work?
2. Who owns migration rehearsal and sign-off?
3. What is excluded from the estimate?
4. How do backups, updates, monitoring and incident response work?
5. What happens to our data and custom code if we change provider?

## Implementation readiness

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- Process owner named
- Data sources identified
- Migration rehearsal planned
- Hosting and security decision recorded
- Training and support owner named