

Electronic Data Interchange (EDI) Toolkit

Automate your business with EDI



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“The ideal scenario is that the solution is so reliable that you don’t notice and don’t stop to think about it.”

Alan Broadhurst
Solution Manager, The Co-operative Food



In today's fast-paced, highly analytical supply chain, the use of networks to facilitate commerce and collaboration can mean the difference between meeting supply chain performance goals and not meeting goals.

IDC¹

Electronic Data Integration (EDI) represents the backbone of the supply chain and is crucial to delivering a robust, resilient network. However, many businesses lack the digital capabilities needed to meet today's business requirements. This guide briefly reviews the key trends and benefits driving increased investment in Business-to-Business (B2B) and EDI integration. It also offers useful insight into the most sought after integration capabilities and self-service tools, as well as practical guidance for selecting the right provider.

Build a business case for B2B/EDI integration

Organizations are increasing investment into EDI solutions and cloud-based integration to meet the need for faster B2B transactions, improved collaboration among trading partners, and resilience against disruption.

Recent research is also helping make the business case for an investment in EDI integration. According to a global survey conducted by IDG,² organizations are investing in EDI and B2B integration solutions to ease:

- Security improvements
- Workforce optimization
- Planned upgrades to internal systems (such as ERP)
- Cost reduction efforts
- Entry into new markets
- External pressure from customers, trading partners, and regulatory mandates

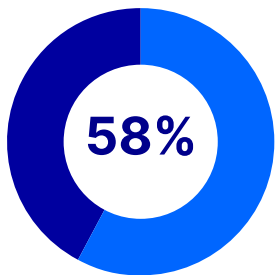
IDC research³ has also confirmed that ensuring full digital integration with both internal systems and external trading partners helps businesses:

Reduce:		<ul style="list-style-type: none">• Operational costs• Logistical costs	<ul style="list-style-type: none">• Cash-to-cash cycle time• Procurement/sourcing costs
Improve:		<ul style="list-style-type: none">• Customer satisfaction• Data quality and accuracy	<ul style="list-style-type: none">• Inventory turnover rate• Supply chain visibility
Accelerate:		<ul style="list-style-type: none">• Time to market• Customer and partner onboarding	<ul style="list-style-type: none">• Strategic decision making

1 IDC Marketscape Worldwide Multi-Enterprise Supply Chain Commerce Network Vendor Assessment, 2018

2 IDG Market Pulse, Taking a Managed Service Approach to B2B Integration. (2021)

3 IDC, Next-Generation B2B integration enables a Digital-First, Resilient Supply Chain. (2022)



58% of smaller businesses see their integration efforts challenged by competing IT projects⁴

Manage an EDI platform with limited resources

Implementing and managing an EDI platform can be daunting as an organization grows in complexity. It requires access to a broad range of skills and capital investment in hardware and software that few organizations can sustain. Exploring an outsourcing approach to EDI, or EDI managed services, is increasingly popular.

However, many would rather outsource only specific aspects of their B2B processes. Fortunately, some solutions do allow this. An EDI provider that offers a flexible approach can provide as much outsourcing support as your in-house staff needs.

This support should enable your company to:

Access experienced B2B professionals

The solution provider augments an operations team for day-to-day systems management, enterprise integration, partner onboarding, and transaction monitoring, allowing you to focus on developing your core business. Targeted EDI outsourcing makes it unnecessary to deploy scarce in-house IT resources to time-intensive integration projects or hire skilled EDI professionals from a rapidly shrinking talent pool.

Accelerate new technology adoption

Leading EDI service providers continue to innovate and update supply chain operations with data and application integration technologies to enable true business-to-anything (B2A) integration via a single platform.

Easily scale your EDI solution as your business grows

With the right provider, a single solution can deliver advanced integration technology, expert integration resources and powerful self-service features. With this approach your B2B program can be easily operated with available resources. This provides comprehensive visibility and key service metrics while ensuring efficient collaboration between organizations and partners, no matter how quickly your supply chain grows.

4 IDG, Taking a Managed Services Approach to Complex B2B Integration. (2022)



Our global B2B network is now managed smoothly and efficiently, with minimal resources required to support new projects or trading partners.

Sundar Nagarajan,
Manager of E-Commerce,
CNH Industrial

[Read CNH Industrial's integration story ›](#)

Extend EDI with advanced B2B capabilities

Companies are increasingly turning to cloud-based solutions to achieve the full benefits of an EDI and B2B integration investment. Here are the capabilities they get with this approach:



Trading partner collaboration tools

One of the biggest advantages of a cloud-based integration network is access to a trading partner community that allows for easily connecting to new business partners to begin doing business quickly. The ideal EDI provider also offers tools to easily manage your trading community, such as a partner communication tool and partner directories enhanced with company profiles to ensure relevant partnerships.



Internal and external integration

A service provider should be able to move data seamlessly between internal and external data sources—connecting, transforming, cleansing, and enriching data to support various types of internal systems and trading partner requirements. Customized API adapters that embed EDI data into existing ERP systems allow users to complete daily tasks without switching between systems.



End-to-end real-time visibility and insights

More complex B2B business activity requires increased visibility into the status and performance of all business transactions. Visibility tools allow you to drill down into your EDI data to see exactly what's going on, create custom dashboards and reports, then apply advanced analytics and deliver the necessary insights to drive better business decisions.



Performance, availability and security

Cloud-based integration platforms provide high availability, robust security features, various compliance standards, and disaster recovery plans to ensure business continuity.



Easy to use, yet powerful self-service tools

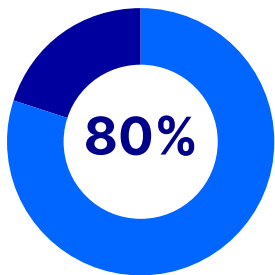
Not everyone needs to be an EDI expert. Self-service tools that empower less-technical personnel to easily and quickly onboard partners, look up and find specific transactions, run business reports and other common processes free up IT staff for other tasks.



Customized solution to fit business needs and budget

Historically, one of the major benefits of EDI was bringing standardization to B2B transactions. As we move towards digital business, however, standardization can sometimes be an impediment.

The best B2B integration providers offer greater degrees of customization. Your provider should tailor how much of your B2B to outsource and how much to keep in house while offering a wide range of digital capabilities suited to your specific business needs and budget.



80% of companies IDC surveyed said the digitization of B2B documents, such as advanced shipment notices, invoices and customs documents has improved their supply chain.⁵

Understanding the range of EDI service options

Choosing the right EDI service provider can be tricky. The need for fully managed solutions has been growing in popularity over DIY software as the availability for technical expertise has been on the decline. Most also consider cloud-based solutions for their flexibility and scalability over on-premises software with tighter control. Don't hesitate to engage EDI experts to navigate the options and ensure a smooth, successful implementation. Here is a list of considerations to get you started.



Choose a cloud-based EDI solution

Access to the latest cloud infrastructure enables a strong provider to deliver high performance and secure services with potential for scalability. A cloud infrastructure also delivers anytime, anywhere access. Forward-thinking providers are not just facilitating integration with other enterprise applications but are also innovating with other disruptive technologies, such as IoT and AI-driven analytics.



Look for flexible pricing options

Take the time to understand your current and future EDI needs, then find an integration provider that can tailor its pricing to your requirements. Watch out for different pricing models that make it difficult to compare vendors. Ask for details on what services are included in the pricing and how much time and effort is expected of your own in-house resources.



Understand technical and program capabilities

Ensure the provider can properly resource at both the technical and program level. For example, for international trading, ensure the provider has the technical infrastructure, skills, and expertise to support both you and your partners in the regions you operate in.



Investigate industry experience

Business transactions may seem similar across industries, but it is still advisable to select an EDI and B2B integration provider with specific experience in your sector. Understanding the specific standards and regulations that govern your operations is essential in highly regulated sectors, such as healthcare, financial services, and utilities.

5 IDC, Next-Generation B2B integration enables a Digital-First, Resilient Supply Chain. (2022)








One of the beauties of the environment is that we do not need to have a large army of people attending to it.

Andy Edmondson
Application Analyst,
The Co-operative Food
[Read Co-operative Food's Integration Story ›](#)

5 Critical components to navigate our new normal

Forget predictability. Our “new normal” involves unexpected demand shifts and supply chain crises. Companies are prioritizing building flexible, robust supply chains that can pivot rapidly as needed. To make this possible, an EDI integration provider should deliver these five critical components.

 Global reach	 Pre-connected community	 Secure & compliant	 Highly available	 Intelligent monitoring
Ability to connect with any trading partner, irrespective of location or technical capability	Leverage the knowledge from previous integration projects to accelerate new trading partner onboarding	Transaction and integration data flows should be secure and compliant with regional regulations	Any disruption should be minimized by having access to a highly available infrastructure	Leverage embedded analytics and proactive notifications to optimize business processes

Critical components of EDI and B2B integration

Global reach

Regardless of whether a company has international operations and connections, access to a global network is crucial for business growth. Global reach includes support for regional communications protocols and document formats, but it is equally important to have access to skilled staff who can offer support in the local language and understand regional differences.

Pre-connected community

Having a connection to a large global network is not enough. Your EDI and B2B provider should be equipped to find and onboard partners very quickly. Having a large global network should also enable you to identify and quickly connect to alternative suppliers during a period of disruption to ensure that your operations will not be impacted.

Security and compliance

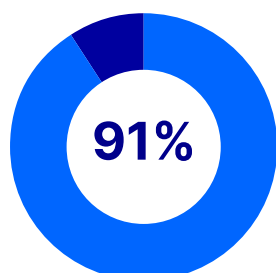
Security should be a key concern for any EDI provider. It should have systems that ensure users have relevant privileges and limitations to access only the applications they need within the network. A global service with data centers spread across regions allows organizations to manage information usage and privacy and can ensure data is only transferred and stored in compliance with regional mandates and country regulations.

High availability

An EDI and B2B provider should have a worldwide infrastructure of data centers to allow for system redundancy and failovers that preserve business continuity. This ensures you can continue trading with existing partners and, when necessary, quickly identify and connect with new partners.

Still not sure what you are looking for?

Try this elimination test on potential candidates to help you pick the right EDI and B2B integration provider.



91% of surveyed midmarket companies say outsourcing their integrations increased the value of their B2B program.⁶

Intelligent monitoring

Leading EDI and B2B providers now have visualization and analytics embedded in their networks. These can include best-in-class, realtime visibility tools with data visualization, drill-down capabilities, ability to manage by exception and configurable dashboards to quickly surface actionable insights and deliver them to the relevant people.

Don't settle for less, use this elimination checklist

You can shorten the initial stage of your EDI and B2B provider selection process through a simple elimination test. Ask your potential providers the following questions. If the provider answers no to any of them, you can safely move on to a better candidate.

Does the provider have a global infrastructure equipped to allow quick and easy connections to customers and suppliers anywhere in the world?	Yes	No
Does the provider continue to invest in its infrastructure to ensure security and high availability?	Yes	No
Do its visibility tools provide real-time data and notifications that enable you to manage by exception?	Yes	No
Does it have technical capabilities for implementation, change management, and ongoing support in all the regions that you operate?	Yes	No
Is the provider's support available in the native languages of your customers and trading partners?	Yes	No
Does its EDI integration platform facilitate local trading law and regulation compliance?	Yes	No
Can you scale your service upwards and downwards quickly?	Yes	No
Is its service cloud based with points of presence (POPs) throughout the world?	Yes	No
Can the provider guarantee availability, disaster recovery, and business continuity as part of its Service Level Agreement?	Yes	No

[Looking for more? Get a complete B2B integration buyer's checklist to help you compare solutions and providers.](#)

6 IDG Market Pulse, Taking a Managed Service Approach to B2B Integration. (2021)

Fast-growing companies want a partner that can grow with them.

Jani Jääskeläinen
CTO, Staria

[Read Staria's story ›](#)

Get the best ROI on your integration investment

Once you have selected a provider, ensure you are getting the best return on your integration investment by taking advantage of all it has to offer.

1 Leverage EDI as part of digital transformation

EDI was one of the first technologies to digitally transform businesses. It is now core to daily business for so many organizations that it is easy to overlook its importance. The COVID-19 pandemic demonstrated the need to improve digital communication and collaboration with suppliers and customers. Cloud-based EDI and B2B integration providers can help facilitate digital transformation, which has proven difficult for many organizations.

2 Drive business strategy with EDI integration

In the past, many organizations viewed EDI as a business enabler. Its simple purpose was to exchange documents digitally. However, EDI and B2B integration can provide many more capabilities to help drive business strategy.

For example, many manufacturing organizations are looking to their supplier base to assist with product innovation and development. Suppliers will manufacture sub-systems that the major manufacturer then assembles. This requires different ways of working and new levels of information sharing. EDI providers can deliver a known, reliable service that can be extended to meet new business requirements.

3 Build success...one document at a time

When most companies begin to deploy EDI, they digitize their purchasing and invoicing processes, but many other types of business document are commonly exchanged via EDI too. An ideal EDI and B2B integration partner should be able to handle any document type using any EDI standard or communications protocol.

Once your invoicing is digitized and automated, expect to see beneficial results of EDI in supply chain operations, customer management, treasury operations—almost any part of your business. Leading EDI and B2B service providers empower you to introduce any new EDI documents your business, partners or customers demand.

4 Implement for today, plan for tomorrow

Like any major investment, selecting an EDI and B2B integration provider takes careful consideration and planning. Current requirements should be clearly established to ensure the EDI and B2B integration provider not only has the correct levels of skills and experience but will also be providing contracts and pricing tailored to your needs.

However, these investments should also be made while considering the long term, so your provider should be equipped to stay future proof. Ask to see its service and technology roadmaps and discuss the plan when deciding what the future looks like for you.

Resources

IDC Infobrief: Supply Chain Integration: A Competitive Advantage for the Mid-Market

[Read the InfoBrief ›](#)

Checklist: The B2B Integration Buyer's Checklist

[Read the checklist ›](#)

5 Use your service provider as a consultant

Your EDI service provider should be a strategic partner that augments your internal IT staff with experienced EDI professionals. Through experience from working on similar programs, your provider should be savvy in the use of best-of-breed technologies and processes. The ability to provide deep knowledge of new technologies and trends can be invaluable, helping guide your integration efforts and easing your connections to partners, suppliers, and customers.

Connect Once, Reach Anything

Whether you are looking to integrate between internal business applications or connect with external trading partners across your digital ecosystem, OpenText™ B2B Integration Foundation makes [EDI easy](#) and digitizes information flows across your people, systems, and things.

[For more information, please visit OpenText B2B Integration Foundation, a solution created for our small business clients.](#)