# EDI as a Service checklist and priorities

Use this checklist as a support tool for choosing an EDI as a Service provider

⊘ Included

| EDI as a Service | | | | |
|---|---|---|---|---|
| **People** | | **OpenText** | **Other provider** | **Priority: L, M, H, N/A** |
| **Trading Partner Management** | | | | |
| **Trading partner onboarding** | Does the vendor provide dedicated resources to connect new suppliers to the outsourced B2B platform? | ⊘ | | |
| **Testing and implementation** | Does the vendor offer to test connectivity with new trading partners and ensure documents can be exchanged seamlessly? | ⊘ | | |
| **Daily reporting** | Does the vendor provide any feedback mechanisms to ensure there are no issues with onboarding new trading partners? | ⊘ | | |
| **Technical Support** | | | | |
| **24×7 helpdesk** | Are the support capabilities 24×7×365 days per year so that problems can be resolved quickly? | ⊘ | | |
| **Change management** | If changes need to be made to maps or communication protocol setups, does the vendor work to a predefined process to ensure changes can be applied without affecting the rest of the B2B environment? | ⊘ | | |
| **Proactive error alerting and reporting** | Does the vendor have processes in place to monitor transactions to ensure they are exchanged correctly and in a timely manner, and will the vendor proactively notify of any issues? | ⊘ | | |
| **Data reprocessing** | Can the vendor provide resources to re-enter or rework information if necessary? | ⊘ | | |
| **Industry-specific support capabilities** | Does the vendor provide a dedicated team that understands the needs of a specific industry, such as automotive, and can respond quickly so as not to affect production environments? | ⊘ | | |

## EDI as a Service

| Process | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|:---:|:---:|:---:|
| **Program Management** | | | | |
| **Dedicated project manager** | Does the vendor offer a dedicated project manager for the implementation of the B2B environment and manage the ongoing needs of the trading partner community? | ✓ | | |
| **Regular status meetings** | Does the vendor initiate regular status meetings relating to the day-to-day deployment of the B2B platform? | ✓ | | |
| **Six Sigma process methodology** | Does the vendor use established and well-known processes to manage the deployment of the B2B platform? | ✓ | | |
| **Visibility and Reporting** | | | | |
| **Event/Non-Event alerting** | Does the vendor offer real-time alerting capability to notify of a particular activity/ situation or when, for example, a document translation does not take place? | ✓ | | |
| **24/7 functional acknowledgement tracking and notification** | Does the vendor report on functional acknowledgements to ensure transactions are being exchanged correctly? | ✓ | | |
| **Service-Level Management** | Does the vendor offer a service level management process to monitor network availability? And if so, is the service level equal to or greater than 99.95 percent? | ✓ | | |
| **Trading partner scorecarding** | Can the vendor measure trading partner performance through a series of out of the box KPIs that can be presented in an executive dashboard? | ✓ | | |
| **Community Management** | | | | |
| **Centralized business partner directory** | Does the vendor offer a means to manage supplier contact information in a central database, for example, contact addresses, email and telephone details? | ✓ | | |
| **Self-Service profile maintenance** | Does the vendor provide a solution that allows trading partners to manage their own contact information? | ✓ | | |
| **Automated partner registration workflow** | Does the vendor offer a workflow capability to manage trading partner registrations? Are configurable workflows available to ensure that all required information is captured? | ✓ | | |

## EDI as a Service

| Process cont.d | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|:---:|:---:|:---:|
| **Mapping and Translation** | | | | |
| **Map design and development** | Does the vendor offer a dedicated team to support the creation and ongoing management of the maps? | ✓ | | |
| **Canonical map library** | Does the vendor offer a set of off-the-shelf canonical maps to support different business processes and industry requirements? | ✓ | | |
| **Any to any data translation** | Does the vendor provide the ability to map to any type of document format, including XML based standards? | ✓ | | |
| **24-hour maintenance and emergency map repair** | Does the vendor offer services to correct maps if errors are found? | ✓ | | |
| **Network-Based translation** | Does the vendor offer on network-based translation rather than via on-premises-based software? | ✓ | | |
| **24-hour maintenance and emergency map repair** | Does the vendor provide a means to capture, monitor and display compliance-related information? | ✓ | | |
| **Technology** | | OpenText | Other provider | Priority: L, M, H, N/A |
| **Worldwide Infrastructure** | | | | |
| **Global B2B network** | Does the vendor's B2B network use local/regional data centers across all the main geographical regions, such as North/South America, Europe and Asia Pacific? | ✓ | | |
| **World-Class Data Centers** | | | | |
| **Secure backup and two-year data archiving** | Does the vendor ensure that data is securely backed up and does it offer a minimum of two years data retention? | ✓ | | |
| **Logical and physical security** | Does the vendor offer robust logical and physical security of its data center environment? | ✓ | | |

## EDI as a Service

| Technology cont.d | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|---|---|---|
| **World-Class Data Centers cont.d** | | | | |
| **High Availability and disaster recovery** | Does the vendor offer a highly available infrastructure with disaster recovery capabilities? | ✓ | | |
| **Data center type** | Tier1/2, single site, backup monitoring | n/a | | |
| | Tier3, multi-site in same region | n/a | | |
| | Tier4, multi-site in multi-region | ✓ | | |
| **IP Comms Support** | | | | |
| **Basic support** | Does the vendor support all of the following basic communications protocols? For example, AS2, FTP, SFTP, FTPS, HTTPS. | ✓ | | |
| **Advanced support** | Does the vendor support all of the following communications protocols? For example, MQ, WebServices, AS1, AS3, AS4, OFTP, OFTP2, Zengin, EBICS. | ✓ | | |
| **Legacy Comms Support** | | | | |
| **Advanced support** | Does the vendor support all of the following communications protocols? For example, Async, Bisync, X.400, SNA, LU6.2 | ✓ | | |
| **Enterprise Application Adapters** | | | | |
| **Basic support** | Does the vendor offer adapters to key ERP systems? For example, SAP® (ALE), SAP (FTP), SAP PI, Oracle® | ✓ | | |
| **Intermediate support** | Does the vendor offer adaptors to mid-market ERP systems? For example, Microsoft Dynamics®, Infor® ERP, QAD® | ✓ | | |
| **Advanced support** | Does the vendor integrate to any other enterprise systems? For example, Warehouse Management System, Transportation Management System, Treasury Workstation | ✓ | | |

## EDI as a Service

| Technology cont.d | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|:---:|:---:|:---:|
| **SMB Enablement** | | | | |
| **Availability of B2B enablement tools** | Does the vendor offer a range of B2B enablement tools to ensure that any trading partner, irrespective of size or technical capability. Can it exchange B2B documents electronically, for example, web forms, fax to EDI, fax to mail, Microsoft® Office adapters, accounting package integration, printer drivers? | ✓ | | |
| **ERP Integration Expertise** | | | | |
| **Support for SAP IDocs** | Does the vendor provide translation of B2B documents into SAP IDoc format? | ✓ | | |
| **Direct integration to SAP** | Does the vendor offer direct integration between its B2B solution and a SAP-based ERP environment? | ✓ | | |
| **Integration support for other ERP vendors** | Does the vendor offer integration to other ERP vendors? For example, Oracle, JD Edwards, QAD, Microsoft Dynamics® AX. | ✓ | | |
| **Transaction Visibility** | | | | |
| **Transaction-level visibility** | Does the vendor offer a portal environment or mobile app to allow individual transactions to be monitored? | ✓ | | |
| **Support for transaction based analytics** | Does the vendor offer a dedicated cloud-based infrastructure for transaction archiving and analytics-based reporting? | ✓ | | |
| **Reporting on business metrics** | Can the vendor measure business type metrics, for example, invoice accuracy, ASN timeliness, trading partner spend? | ✓ | | |
| **Reporting on operational metrics** | Can the vendor measure operational type metrics, for example, transactions by type and transaction volumes by partner? | ✓ | | |
| **Community Management** | | | | |
| **Visual representation of a trading partner community** | Does the vendor offer a visual way to map out a community of trading partners? | ✓ | | |
| **Trading Partner Onboarding** | | | | |
| **Auto-provisioning of trading partners** | Does the vendor offer an automated way to onboard a trading partner community? | ✓ | | |

## EDI as a Service

| Technology cont.d | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|---|---|---|
| **Notifications** | | | | |
| Business event notifications | Does the vendor offer the ability to send notifications according to certain business rules or conditions | ⊘ | | |

| Vendor Information | | OpenText | Other provider | Priority: L, M, H, N/A |
|---|---|---|---|---|
| **Industry Presence** | | | | |
| Number of EDI as a Service customers | How many customers does the vendor serve? | **>900** | | |
| Industry support | Does the vendor support customers in all of the following industries, retail, CPG, automotive, high tech, industrial, financial services, healthcare, pharmaceutical? | ⊘ | | |
| **Industry Analyst Validation** | | | | |
| External analyst validation | Does the vendor have positive feedback from key industry analysts, such as Gartner, Forrester and IDC? | ⊘ | | |
| **Company Financial Health** | | | | |
| Financial performance | Is the vendor's B2B outsourcing revenue increasing or decreasing on an annual basis? | Increasing | | |
| **Strategic Partnerships** | | | | |
| Third-Party partnerships | Does the vendor have any strategic alliances to push its outsourced solution further into the market? | ⊘ | | |