



DATA MASONS

EDI MADE SIMPLE®

EDI Made Simple® - A New Approach to EDI

The purpose of this brief is to present a clear, simple path to successful implementation of a highly productive and profitable EDI initiative in your company. You may be experiencing one of these scenarios:

- 1 One of your customers or suppliers has asked you to connect with them, or offered superior terms as an incentive to connect.
- 2 You've noticed that your competition is doing more with fewer employees from the use of EDI and you want to enjoy similar benefits.
- 3 You've attempted to implement EDI in your company, but are not satisfied with your results and understand that you could improve on the experience.


If you're reading this executive brief on how to make EDI simple, you've likely either been asked to implement EDI in your company, or improve upon the EDI solution currently in use by your company. In either case, this brief is for you.

The good news is that putting EDI to work for your company can be simple. It needs to be, given that a growing number of companies large and small have been successfully exchanging and integrating transactional information using EDI for more than a quarter of a century.






For those who are about to bring EDI into your processes, this brief will help you avoid the potential pitfalls encountered when approaching it without this guidance.

For those who are reading because you've attempted to implement EDI, you'll likely recognize at least some of the problems we describe, and gain from our explanations on how to avoid them.

EDI can be made simple by following what has been demonstrated repeatedly over the years to be a highly successful process, and avoiding other approaches that can create headaches now and in the future.



You'll find that avoidable additional costs can emerge from many sources:

-  **Forced Upgrades Or Retrofitting**
 Embedded solution providers can require undesirable Dynamics ERP version updates or custom code retrofitting to older versions. The results are expensive "one-off" coding and pose a risk to your production Dynamics ERP system.
-  **Ongoing Data Mapping**
 As new and existing partners introduce more documents, more data elements must be added and "mapped" to the translator. More customization means greater delays in setting up new partners and a higher cost for upgrading to new versions.
-  **Compliance Responsibility**
 Toolset solutions place the EDI compliance and functionality burden squarely on the Dynamics ERP user.
-  **Unclear Support**
 Meshing EDI tools such as translators together with custom code frequently blurs the lines of support responsibility. This can create confusion at crucial times.
-  **Ongoing Costs**
 Once an EDI/XML document exchange and integration solution is built, the work has just begun. New initiatives such as additional EDI document sets and trading partner additions can trigger unwanted surprises and significant expenses for the developer and the Dynamics ERP user.

Cost is Key

Minimizing costs is a key function of EDI, from initial integration to expansion of processes, extension to more trading partners, and scaling to accommodate future growth of your business. The simplest and best process will be the one that maintains the lowest possible cost of ownership at all times.

Solutions vs. Tools

Many EDI providers sell tools including translators such as Sterling Gentran® (GIS) and Trusted Link®, or electronic application integration (EAI) systems. These tools usually require complicated customizations to your Dynamics ERP and tedious mapping of fields, which can distract you from your core business and often compromise Dynamics ERP upgrades.

Building an EDI infrastructure with a typical translator or EAI tool adds risk to any ERP implementation and continues to add cost to ongoing operations. Tools place the onus and risk on your team and/or your Dynamics partner to engineer a potentially enormous complex development challenge, and you may not have qualified developers on your team who are capable of these tasks. This immediately adds cost as you hire or outsource such developers, and keep sourcing them every time your process requires updating. These costs never end.

A Solutions approach fundamentally handles all of the "heavy lifting" for you when it comes to ERP integration and compliance with various trading partners' rules and requirements. The immediate benefit is that you continue to focus on your business, not on building EDI integrations.

A major component of that Solution is selecting an EDI Solution Provider with consulting resources on staff that are experts in both your ERP platform and your particular type of business. By focusing on a narrower group of ERP products and industries, they can better ensure the efficient and durable setup of an EDI infrastructure.

The Simple EDI Solution Adapts to Your Business Processes

Whereas most EDI Tools force you and your Dynamics ERP to adapt to rigid rules to overcome their functional limitations, the right Solutions design accommodates nearly limitless business scenarios. This is supported by a sophisticated rules engine you can configure to handle the most complex business environments and integration challenges.

It supports your business transactions "cradle-to-grave." This means the Solution, not your Dynamics ERP, is handling the entire transaction cycle – from your partner, into Dynamics and then back to your partner. So even if your Dynamics ERP is customized, it does not negatively impact the efficiency of the EDI transactions.

When you evaluate EDI Solution models, look for those that are engineered to be flexible and accommodate your business needs. Obtaining the right solution for your business means you don't have to alter your business model to suit the software.

The right EDI Solution must support any of the file formats currently in use. Popular EDI formats include X12, EDIFACT, ASCII delimited or fixed position, XML, cXML, PIDX, Oildex and RosettaNET. Look for EDI solutions that support as many of these as possible, to accommodate future trading partner requirements.

EDI is Made Simple When You Don't Go It Alone

- Purchasing tools that force customizations to your Dynamics ERP system leaves you responsible for maintaining the system going forward.
- Engaging the experience, expertise, and the complete solution offered by Vantage Point from Data Masons is the most secure and safest way to assure that you've partnered with a proven Solution provider.



Discover how to overcome the challenges found with integrating EDI and Dynamics in Data Masons' Executive Brief, *"EDI and Microsoft Dynamics: Customer Success and Challenges"*.

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The Simple EDI Solution Adapts to Your Resources

It's also important to find EDI Solutions which offer service level options, to enable the proper level of involvement by your company, whether that means a fully-managed solution, or one that allows your company to be entirely self-sufficient. The more flexible and accommodating the Solutions Provider can be to complement your existing resources, the better.

Beyond human resources, also consider your existing Information Technology (IT) resources. Do your network and servers currently have sufficient capacity to support the addition of an EDI solution or will that require significant system upgrade investments? An EDI Solutions Provider who offers both an on-premise solution as well as a cloud-delivered solution can accommodate your available IT resources either way.

As your EDI Solution becomes one of your key resources, you will identify ways in which you would like to see it enhanced or support additional documents. The right EDI Solution simplifies the process of adding EDI features or improving existing ones without forcing you to upgrade your ERP at the same time.

This contrasts with many "embedded Dynamics ERP customizations" which often present major roadblocks (i.e. forced Dynamics ERP upgrades) when you need to support new features or documents. Externally connected, tightly-integrated EDI Solutions make it easy to achieve new EDI customizations with no impact to your Dynamics ERP platform at all. This approach allows you to enjoy the latest emerging technology features without ever having to upgrade your Dynamics ERP solution.

The Simple EDI Solution is Fully Automated

One of the most expensive costs on a company's balance sheet is personnel. The more automated your EDI Solution is, the fewer people are required to manage and maintain it. This extends to the transactional processes that EDI supports. Proper EDI automation will feature a variety of "alert" technologies which notify your team when transactions require human attention. If a transaction problem is overlooked or not resolved within your pre-determined timeframe, automated alerts or reports will remind your team that these transactions require their attention. **This is known as management by exception.**

The Simple EDI Solution Scales with Your Company

When your success produces growth, things can easily get complicated if you also outgrow your EDI solution. The right EDI Solution supports multi-server and multi-instance environments servicing a single business entity, which guarantees expansion limited only by available network computing resources.

Be on the Lookout for Transaction Fees

Many providers actually seek to make costs less predictable by charging a fee for every transaction performed on their EDI system. This can easily blindside you with significant and unexpected ongoing costs as your business grows. The right EDI Solution provides a predictable cost of ownership that is not based on transaction fees, but rather on a predictable and measurable cost model that enables you to easily measure your return on investment.

Conclusion

EDI can be made simple by following this highly successful and proven process, and working with a Solution Provider who puts customers first, delivering quality solutions and unparalleled customer service. Contact us for a private [product demonstration](#) and consultation.