

DESCARTES™

# Six steps towards a successful EDI implementation

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## Introduction

Implementing the exchange of Electronic Data Interchange (EDI) messages, fully integrated with an Enterprise Resource Planning (ERP) system, is a complex endeavor, which requires not only the right technology but also the commitment of all internal and external stakeholders. Essentially, it is not an IT project, but an organizational one. A rollout of EDI is a full-fledged, multi-faceted project with a variety of interdependent activities and tasks.

Since a project involves multiple parties and mutual alignment, appropriate planning and overall coordination are prerequisites for success. Also, before you can start an EDI implementation, information concerning the desired message content and communication protocol to be used between the trading partners must be available.

A structured, project-based approach is required to make a success of any implementation project whether it is a greenfield or a migration situation. Descartes' six steps for a successful approach are described in this e-book.

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# Involve all stakeholders



The first step is to ensure that all stakeholders are involved. Form a project team with representatives from all stakeholder groups. Implementing a standard message set is not just an IT project. Ideally, a dedicated project owner is assigned for this task to link IT and the wider organization. It is also key to involve the ERP supplier, who needs to be able to connect to the EDI platform.

## Important stakeholders are:

- The customer: the company that intends to exchange EDI messages with one or several trading partners: Management, IT, Business;
- The IT partner: this party provides the management of the customer's ERP software. Usually, this party is also responsible for 'unlocking' the ERP system for EDI message exchange;
- The trading partners: the business partners with whom the customer wants to exchange EDI documents;
- The EDI solution provider - provides EDI messaging solutions for translation, transmission, and management of EDI messages;
- Project management is responsible to align the various stakeholders involved. The project consultant guides the implementation project based on best practices from kick-off meeting to go-live.



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# In-depth analysis



Define desired message content and communication protocol.

The next step is to perform an **in-depth analysis** of all the data of the required message set. This requires the availability of the right information. Topics such as Message Implementation Guides (MIG), functional bilateral agreements between parties, code system usage, and master data set-up affect the EDI message content and the information logging in the ERP package. In most cases, the source of the EDI message should also be reflected in the in-house format of the ERP software. A successful project requires both in-depth EDI knowledge and an understanding of how to use it.

## External information:

- A list of trading partners (including name, address, and contact information) whom the customer intends to exchange EDI messages with.
- An overview of message types a customer sends and receives, used EDI standard (EDIFACT, ANSI X12, others...), and version number.
- The Message Implementation Guides (MIGs).
- Any additional requirements, such as: Alignment Overviews, Invoice Lists, acknowledge message (such as CONTRL or APERAK) and digitally signed invoices.
- A list of business scenarios.
- The method of connectivity to connect to the Descartes Global Logistics Network™ (Descartes GLN™).

## Internal information:

- The structure and content of the customers' in-house format (=ERP format).
- The method of connectivity to connect to the Descartes Global Logistics Network™ (Descartes GLN™).
- The preferred approach for migration.
- The more information is provided upfront, the smoother the EDI realization phase will be.

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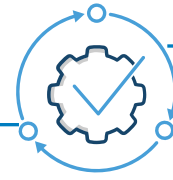
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# Develop an integration strategy



A successful project starts with a solid integration strategy. Answering the questions below will help you to define your strategy.

## Questions

- How will you implement the message set among partners? Will you force them or nudge them? Depending on the type of partner, some kind of force is sometimes needed to convince partners to adhere to the new situation.
- How will you communicate with your trading partners? It is wise to draft a communications plan and align this with the business.
- In which order will you implement the set: in slots or sequentially? This is mainly dependant of the type of organisation that implements the solutions and its type of partners.
- What is the desired timeframe? Making agreements with your implementation partner on the timing is an essential part of the plan.

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# Test the system



Make sure that you test the solution thoroughly. Testing will create insight in how you have prepared and how the system works in practice. It is advisable to test the message set with a representative pilot customer. Make sure you list the responsible persons and use representative test files. After the test, adjustments can be made and next, it is much easier to connect other trading partners.

Once the mappings are created, they are technically tested with the existing ERP software. The next step is the end-to-end testing between the customer and trading partners aiming to eliminate possible issues during the actual go-live.

## Technical and business scenarios

It is important to note the difference between technical and business testing. A technical test can succeed but still a specific business scenario can fail. Therefore, it is key to test all business scenarios thoroughly. This requires extensive input from the business by thinking about testing when processes are described and by allowing for ample time in the testing phase.

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## Go-live support

Before the actual go-live, the project consultant will instruct the main stakeholders on the track & trace tools provided by Descartes. After go-live, the project team will remain on standby for several days.

As the Descartes EDI solutions are highly intuitive, extensive training is not required. Still, the right instruction is required to adopt the software and making efficient use of it. Also, the system needs extensive documentation, which provides visibility for the users.

### Project completed

The project is completed when the defined EDI messages can be exchanged – both automatically and successfully – between all agreed trading partners and the ERP system. After completion, the project will be handed over to Descartes' support and maintenance team. Depending on your specific business, a 24 x 7 or business hours support service can be implemented.



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# Use, manage, migrate

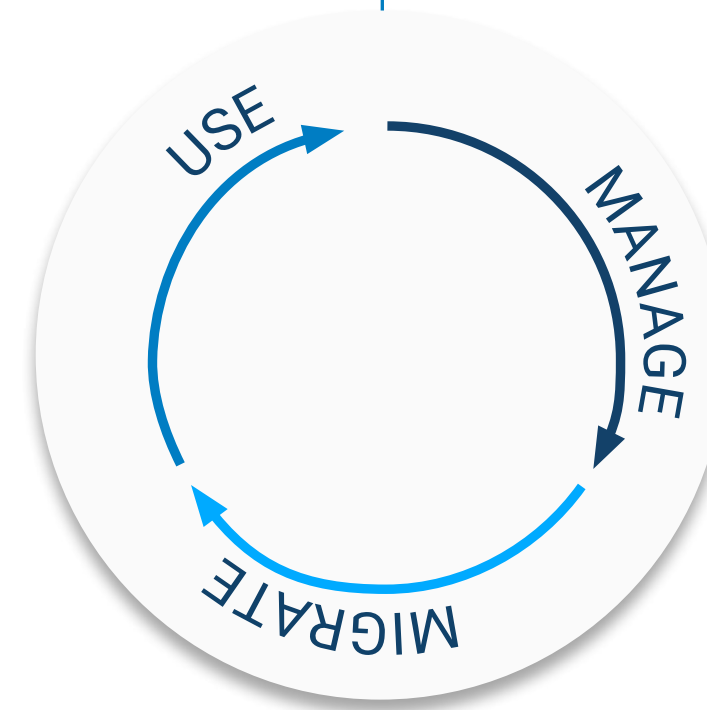


The go-live sign triggers the actual implementation and the start of a new phase, managing the daily operations. To reap the benefits right from the start comprehensive and regular training for the different users is a prerequisite. As for the daily management, nowadays EDI is available as a cloud solution, which enables an organization to fully focus on the business.

## Migration trading partners

The technical setup of trading partners is also managed by the implementation consultant. The communication and administration of guiding the trading partners to adjust to the new working method is not part of the project. As this process is highly dependent of the cooperation between the trading partners, these activities can become very time-consuming.

Upon request Descartes offers a trading partner on-boarding service, for which you would only need to provide the trading partner relationship details.



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# About Descartes



Descartes (Nasdaq:DSGX) (TSX:DSG) is the global leader in providing on-demand, software-as-a-service solutions focused on improving the productivity, performance and security of logistics-intensive businesses. Customers use our modular, software-as-a-service solutions to route, schedule, track and measure delivery resources; plan, allocate and execute shipments; rate, audit and pay transportation invoices; access global trade data; file customs and security documents for imports and exports; and complete numerous other logistics processes by participating in the world's largest, collaborative multimodal logistics community. Our headquarters are in Waterloo, Ontario, Canada and we have offices and partners around the world.

Learn more at [Descartes.com](https://www.descartes.com) and connect with us on [LinkedIn](#) and [Twitter](#).

## DESCARTES

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Uniting the People & Technology  
That Move the World



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