

ERP integration roadmap

How to choose the right EDI and
data integration solution



API

AI



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ERP integration—What is it and why does it matter?

Enterprise resource planning (ERP) integration refers to the process of connecting various systems and applications within an organization to streamline and synchronize data, processes, and functions.

It involves facilitating smooth data flow and communication across different departments and functionalities by linking ERP software with:

Other internal systems

External systems

 CRM	 Vendors
 HRM	 Customers
 Data sources	 Partners
 Inventory management	 Data exchanges

44%

of transactional data in ERPs comes from external sources.¹

¹ OpenText and IDG Communications, Inc, ERP Modernization and Growing Data Challenges Drive 91% of Enterprises to Modernize Integration Solutions

ERP integrations come in many shapes and sizes, depending on the number of trading partners a company has and the types and volume of data flows. For common, repeatable use cases, there are easily deployed pre-configured integration solutions. However, customizations, advanced processing rules, and niche applications can make integrations difficult to configure, support, and maintain. For these companies, a do-it-yourself solution can be especially problematic.

External integrations with suppliers, customers, and other business partners who have their own individually configured systems and ways of working add further complexity.

Why should you re-evaluate your ERP integration solution requirements now?

Unless you are deploying your first ERP, you likely have some integration solutions already in place. However, if these solutions do not align with your existing ERP, it may be time to re-evaluate.

Fragmented ERP systems make it virtually impossible to digitize and automate key business processes and workflows without integration. Whether your company is migrating ERP systems, undergoing M&A activity, or planning a digital transformation initiative—modernizing your *enterprise integration* strategy can reduce risk and enable scalability.

Key drivers for re-evaluating your ERP integration solution

 ERP transition deadlines (end of support notices)	 Lack of support for legacy systems
 ERP migration (e.g. on-premises to cloud)	 Divestitures
 Digital transformation initiatives	 Business expansion
 Specialized staff turnover	 Requirement changes due to compliance mandates or new information security policies
 Business restructuring	 Mergers and acquisition activities

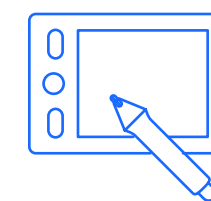
Why EDI, API, and data integration matter more than ever

Companies have spent plenty of time and money implementing enterprise resource planning (ERP) solutions to automate specific business processes, such as finance, purchasing, inventory management, and operations. This has had a positive impact on business performance, but the monolithic design of traditional ERP systems, as well as heavy customizations over time have made the systems inflexible and continued innovation a major challenge.

When choosing a vendor, capabilities matter, but expertise, experience, and support are just as vital. Partnering with the wrong vendor will result in unexpected costs and delays. However, partnering with the right vendor can deliver significant ROI.

[See what your company can expect with our ERP Integration ROI calculator.](#)

Without an ERP integration solution, companies risk:



Excessive
manual work



Data
silos



Wasted
resources



Higher
operating costs



Errors



Compliance
issues



Supply chain
disruption

The business case for an ERP integration solution

In essence, ERP integration aligns various aspects of a business into a centralized platform, improving operational efficiency, accuracy, and adaptability. It's a strategic investment that can significantly enhance a company's competitive edge in today's dynamic business landscape.

Not all integration providers have the capacity to deliver a smooth, risk and disruption-free transition within time and budget. Also, most businesses don't have the resources available, or the internal expertise, to manage an ERP integration on their own.

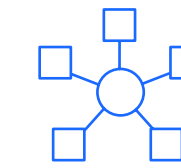
[Leverage our EDI-as-a-service to help you assess potential providers.](#)

Sixty-seven percent of CFOs believe their digital spending investments are underperforming against expected outcomes, primarily due to poor CFO-CIO alignment and lack of organizational transparency around digital performance.²

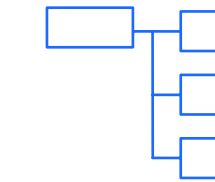
² Gartner, The CFO's Playbook for Improving Digital ROI, 2022

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ERP integration offers several compelling business advantages:



Streamlined operations



Scalability and flexibility



Cost savings



Enhanced reporting and analytics



Improved communication and collaboration



Data consistency and accuracy

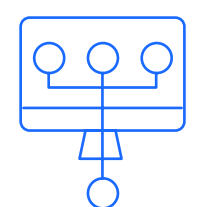


Customer satisfaction



Efficient supply chain management, including:

Inventory management
Reduced lead times
Better supplier relationships



Legacy system consolidation



Regulatory compliance



AI readiness

Align your integration solution with your current ERP

An integration solution will only help eliminate ERP challenges if it aligns seamlessly with your current strategy. Consider the following strategy questions in assessing your current strategy before you speak to a vendor:

- Are you using a legacy system or a modern system?
- Are you using a license-based system or a pure SaaS ERP?
- How many ERPs are you deploying?
- Are you working with a single vendor or several?
- Is your ERP system(s) scalable to accommodate future growth and changes in your business?
- How easily can your ERP system(s) be adapted to evolving business needs?
- What resources are dedicated to your ERP strategy?
- Do you have the technical expertise and resources available for successful integration?

No matter your strategy, your ERP integration vendor should be able to offer expertise with legacy systems and have the experience to understand your specific needs.

“OpenText is the primary vehicle for integration. Whether that means integration of system-to-system-to-system-of-records or system-to-system where we’re trying to unify certain data to serve those transactional processes; or it becomes a vehicle to manage interactions to systems of engagement (physical endpoints sitting outside the company: a mobile app, a transactional service, etc.). So, we needed something that could quite easily slot into our ecosystem without it just being another half-thought, half-baked solution.”

European Manufacturer

Make your ERP integration AI ready with data-driven connectivity

Another benefit to modern ERP integration is enabling AI readiness. Once you've laid the foundation for a more agile, scalable ERP environment, you can adopt centralized governance for better data control and visibility.

The ability to harness the data hidden within your ERP, and the various systems and data sources linked to it, has the potential to democratize data sharing across your organization and galvanize business growth.

- 1 Ensures data quality and consistency across internal and external systems.
- 2 Unifies data access from ERP, CRM, SCM, and partner platforms.
- 3 Simplifies AI pipeline feeding with structured and unstructured data aggregation.
- 4 Enables real-time data exchange via APIs and extracts data from both EDI and APIs to support predictive analytics.
- 5 Automates AI-driven workflows (e.g., forecasting, exception handling).



13 buying tips to help you choose an ERP integration solution

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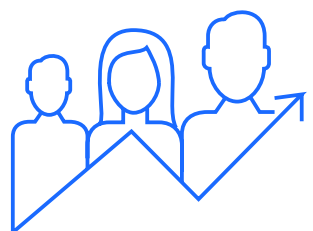
Assess your needs:



Understand your business requirements and processes thoroughly. Identify the specific functionalities and features you need from an ERP integration solution.

2

Scalability:



Ensure the solution can scale with your business as it grows. Look for flexibility in adding new modules, users, or integrating with other systems.

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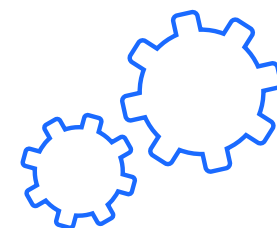
Compatibility:



Check compatibility with your existing systems, software, and databases. Ensure it delivers seamless integration without disruption.

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Customization:



Look for a solution that is customizable and adapts to your workflows rather than forcing you to change them.

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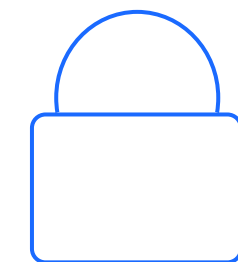
Vendor reputation:



Research the vendor's reputation, customer reviews, and their track record in delivering ERP integration solutions. Pay special attention to reliability and customer support.

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Security measures:

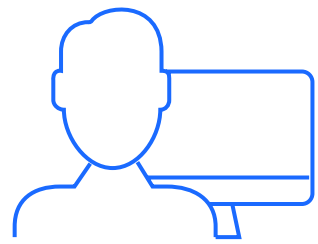


Ensure the solution complies with industry standards for data protection. Look for features like encryption, user access controls, and regular security patches.

13 buying tips to help you choose an ERP integration solution

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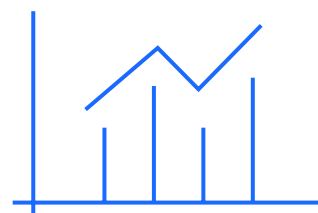
User-friendly interface:



Without user adoption, your investment can fail. Ensure the solution is intuitive and easy to navigate to minimize training requirements for your team.

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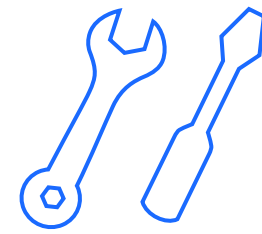
Cost considerations:



Understand the pricing model—whether it's a one-time purchase, subscription-based, or involves additional costs for maintenance, updates, and support. Calculate the total cost of ownership.

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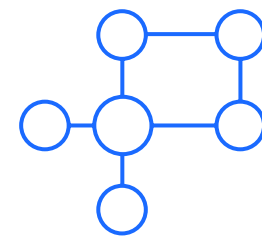
Support and maintenance:



Consider the level of support and maintenance the vendor provides. Look for timely customer support, training options, and available resources for troubleshooting.

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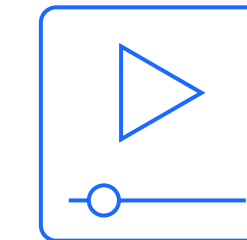
Future roadmap:



Inquire about the vendor's plans for the solution. Ensure they have a roadmap for updates, improvements, and staying current with technological advancements.

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Trial or demo:



Request a trial or demo to test the solution's functionality, usability, and compatibility with your business needs before making a commitment.

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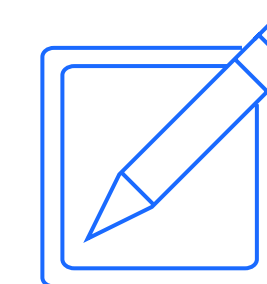
Contracts and SLAs:



Review contracts thoroughly, paying attention to service level agreements (SLAs), terms of service, and any clauses related to upgrades, support, or termination of service.

13

Feedback from similar businesses:



Reach out to other businesses similar to yours that have implemented the solution. Learn from their experiences and gather insights.

Get started with the ERP integration solution journey

Once you determine the need for an ERP integration project, we recommend scheduling a call with a technical resource, like a sales engineer, to talk through your environment.

For straightforward integrations, conversations with a technical resource and a demo should suffice.

For larger or more complex integrations, a proof of concept may be the best route, so you can make sure you are deploying the best solution for your environment.

Some vendors also offer migration-specific professional services, which you can leverage to ensure a smooth process from initial set-up to final cutover.

The complexity and disruption associated with migrating data leads some businesses to delay or forgo IT upgrades. However, delaying workload migrations also limits innovation and stagnates IT systems in a way that can leave businesses at a disadvantage.



Here are three ways that partnering with OpenText's integration experts can reduce risk:



Requirements gathering

Relying on general ERP consultants for capturing partner-specific data requirements can lead to significant delays and missed opportunities for consolidating integration maps and fixing recurring errors.

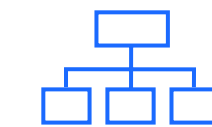
Bringing in B2B integration experts to identify integration requirements in partnership with ERP experts can significantly accelerate the migration project.



ERP integration redeployment and testing strategy

Newly built or reconfigured integrations must be tested to ensure that data processing works as intended. An accurate understanding of the complete requirements is essential for a successful test strategy.

In the case of B2B integration, using copies of real business transactions exchanged with trading partners to simulate the behavior of the new ERP system can minimize the risk of issues or exceptions going undetected.



Skills and resourcing

If integration experts are not involved in the project planning stage, defined timelines may not be realistic and demand for specialist skills may not be anticipated correctly.

When embarking on an ERP modernization project, organizations ignore integration at their peril. Treating integration as a strategic capability can help accelerate the ERP project and reduce costs.

Leverage an expert: Get advice from an integration advisor

Focus on the priorities that matter and lean on external help to mitigate risk, lower costs, and accelerate your ERP integration project. OpenText™ Business Network advisory services are available either as a standalone offering or as part of a complete solution.



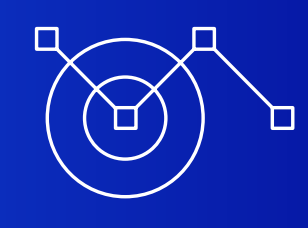
Experience and Solutions

- 45 years of experience
- OpenText is currently running the largest private network
- Brand-name references available
- Serving 22 of the Gartner top 25 supply chains
- Following EDI best practices across 40,000+ engagements



Global Reach

- Operating in 20 countries
- 24 × 7 “follow the sun” engagement available in 12 languages
- Centers of Excellence in India and the Philippines



Proven Scale

- 2500+ Professional Services resources (1400+ serving Business Networks)
- Implementing thousands of changes each month
- Maintaining a constant queue of 100+ active enterprise projects
- Offering best-in-class PM/DM



Solve ERP challenges with OpenText

OpenText Business Network B2B integration solutions help companies transform and future-proof their integration environments by leveraging a scalable and secure platform that connects to any integration endpoints—whether internal applications or external trading partner systems—and orchestrating intelligent, flexible data flows between them.

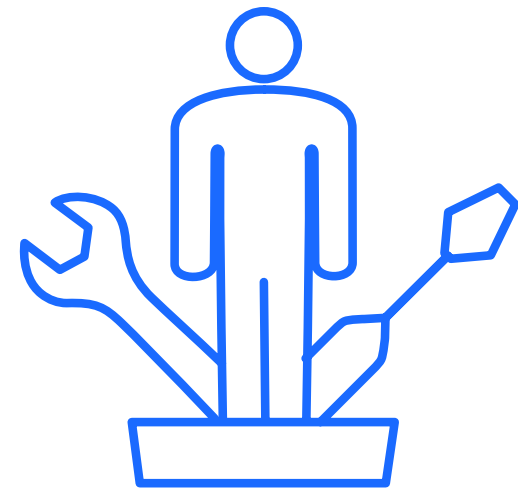
We can also assist with improving operational data quality, so your ERP and modernization effort are AI ready. Approximately 52 percent of companies across industries report a lack of sufficient collaboration with external suppliers and/or customers.³

With a long history as a B2B integration provider connecting more than 1.1 million organizations around the world, OpenText has deep expertise in managing the complexities of B2B data exchange. This is particularly helpful for organizations managing many integrated trading partners, many of which likely have fragmented integration environments that can add risk to the ERP migration projects if not managed correctly.

If your ERP project involves redesigning business processes or adopting more advanced integration capabilities, OpenText's experience and expertise can be extremely valuable in helping an organization drive greater process efficiencies and discover new opportunities for business optimization. Whether you're using SAP S4/HANA, Microsoft Dynamics 365 Business Central, Oracle NetSuite, Oracle Fusion, or a mix of legacy systems and APIs, OpenText can help you navigate ERP and integration complexities.

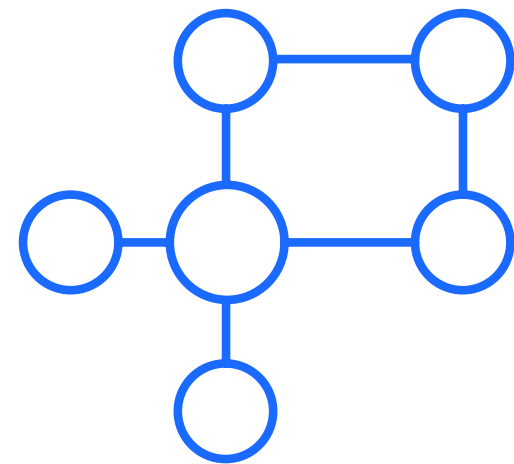
³ IDC, Supply Chain Survey, March 2023

4 reasons OpenText is the ideal partner



Experience and solutions

45+ years in delivering integration services, 1.1M organizations connected, extensive [B2B solution portfolio](#)



Pre-built APIs for most ERPs

Access to pre-built APIs that integrate [EDI](#) into any ERP, providing users with real-time transaction status directly within their current system



Governance process and tools

Proven implementation methodology and best practices, [expertise](#) across multiple industries, proprietary tooling



Global scale and reach

1,400+ professional services resources across 20 countries, 100+ active [enterprise](#) projects ongoing at any time

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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