



## opentext ERP Integration Roadmap User Guide

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**ERP integration roadmap:  
A buyer's guide to smarter integration**

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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 linking ERP software with to facilitate smooth data flow and communication across different departments and functionalities.

Other internal systems	External systems
 CRM	 Vendors
 HRM	 Customers
 Inventory management	 Partners
 Etc	

**44%**  
**of transactional data in ERPs comes from external sources.<sup>1</sup>**

<sup>1</sup> 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.



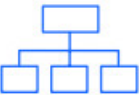





However, customizations, advanced processing rules, and niche applications can make integrations difficult to configure, support, and maintain. For these companies, a do-it-yourself solution can be especially problematic. External integrations with suppliers, customers, and other business partners who 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.

### Key drivers for re-evaluating your ERP integration solution





	Deadlines such as SAP S/4HANA @transition
	ERP migration
	Digital transformation initiatives
	Specialized staff turnover
	Business restructuring
	Lack of support for legacy systems
	Divestitures
	Business expansion
	Requirement changes due to compliance mandates or new information security policies
	Merger and acquisition activities

### The business case for an ERP integration solution

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 the heavy customizations required to meet an organization's specific needs have made the systems inflexible. As the demands around digital transformation of business processes increase, this is becoming 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

In essence, ERP integration aligns various aspects of a business, improving 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.

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

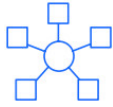








67% of CFOs believe their digital spending investments are underperforming against expected outcomes, primarily due to poor CFO-CIO alignment and lack of organizational transparency around digital performance. 2

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

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ERP integration roadmap

**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
	<b>Efficient supply chain management, including:</b> Inventory management Reduced lead times Better supplier relationships
	Regulatory compliance

## 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 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

## 13 buying tips to help you choose an ERP integration solution

### 1. 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.

### 3. Compatibility:



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

### 4. Customization:



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

### 5. 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.

### 6. Security measures:



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

### 7. 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.

### 8. 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.

### 9. 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.

### 10. 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.

#### 11. 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.

#### 12. 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 purchasing process

Once you have determined 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 forego 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 an essential component of a successful test strategy.

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



#### Skills and resourcing

If integration experts are not involved in the project planning stage, defined timelines for integration work 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. On the other hand, treating integration as a strategic capability can help accelerate the ERP project and reduce the costs involved.

### 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 x 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. Connect any integration endpoints—whether internal applications or external trading partner systems—and orchestrate intelligent, flexible data flows between them. This allows for automating business processes, improving process efficiency, and discovering new opportunities for business optimization.



**Approximately 52% of companies across industries report 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 a large number of integrated trading partners, since many 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, adopting more advanced integration capabilities can be extremely valuable in improving operational data quality and increasing process automation. Regardless of the ERP, OpenText helps organizations navigate integration complexities and risks with detailed insights and expertise.

3 reasons OpenText is the ideal partner

		
Experience and solutions	Governance process and tools	Global scale
45 years in delivering integration services, 1.1M organizations connected, extensive B2B solution portfolio	Proven implementation methodology and best practices, expertise across multiple industries, proprietary tooling	1,400 professional countries, 100+ at any time


About OpenText

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Documents / Resources

	<a href="#">opentext ERP Integration Roadmap</a> [pdf] User Guide ERP Integration Roadmap, Integration Roadmap
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References

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[Manuals+](#), [Privacy Policy](#)

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