

EDI Roll-out is my favorite area of concentration. Would like to pass on some issues/concerns from a company just getting into the EDI arena:

"My company is in the process of getting EDI up and running. We plan to do extensive parallel testing with our first 5 trading partners to ensure everything is working properly.

I was wondering how long it would take to start rolling out other trading partners after that.

Here are the factors to consider:

-We're going to receive 810 invoices from our vendors through EDI and possibly other documents.

-We will have already have set up 5 initial trading partners before attempting to roll out other partners.

-EDI is new to me and the rest of the employees in my company.

Is it realistic to think that we could roll out one vendor per week for 3 weeks? And then 2 per week for the next 8 weeks after that and finally advance to 3-4 per week?"

Yes, it is "possible". However, you have numerous unknowns that will impact your ability to get it done.

- Your EDI experience is admittedly slim, making it difficult to respond appropriately to issues that arise. And there will be a lot of them, happening quickly.

- You have no control over your trading partners. You may call them all and let them know you'd like to turn them on. However, many trading partners require a testing cycle and simply not have the time to slot you in immediately. Also, some Trading partners require a "lot" more work than others.

- You have not indicated how many of "your" folks would be involved in the effort. This is actually quite a bit of work, with a great deal of coordination and details that need to be managed.

- You have not indicated if you have all of the affected business groups in your organization prepared and ready to assist. Implementing EDI is not just a technical endeavor. It requires understanding, buy-in, and support from all of the groups that will be impacted. Here is a simple one - you have to get your vendor relations group involved. They are the ones that know who the right contact is. They also know which partners are the biggest pain to work with (start them early). You need to have upper management's involvement - they know what the priority is for roll-out.

I recommend bringing in a consultant. Here is why. Bringing up trading partners is a clearly defined effort, with a clearly defined beginning and end. It requires skills that you probably don't have, for an effort that needs to be done immediately. Success is required, and there isn't time to really train for this. It is something they don't cover in school. I have been doing this stuff since 1990. (Think of it, tell somebody in 1990 that you "did EDI" and imagine their reaction!) I probably will not be able to help you with yours, but I might know somebody who is available.

Since you will be receiving 810's, I will assume many are suppliers. Did you create an Implementation Guide to send to all suppliers so you need only have one set of maps for them? Are you sending schedules or PO's? Are you expecting ASN's (856)? If you have the standards set since you are the customer, you can make your supplier roll out much simpler. If you are the supplier on the other hand, you will need to comply with your customer's wishes for the most part. Of course, there may be extenuating circumstances where you might need to do custom for suppliers, but if you have a great number of them, it would make it much easier to use one set of maps. Get that Implementation Guide out to all your suppliers ASAP to give them time to do what they need to do. You also need the backing of your purchasing department for this project. You don't say how many there are, but it sounds like quite a few from your goals. If you standardize the supplier side, your supplier roll out can actually be done quicker. Communication with your Customer's/Supplier's is key.

To expand, I caution you that each trading partner will present you with a different set of challenges. Some will be simple, straightforward, professional, and will return phone calls and respond to emails in a timely manner. Their data will be error-free, and compliant with your implementation guide. There are few of these Trading Partners in the world. The remainder present various problems, and each one will have new challenges, from people who don't know and don't care about what they are supposed to be doing, to technical problems and system incongruities that you didn't plan for.

Rolling out partners can be a trying and tricky endeavor. Some of your trading partners will be a "snap" to implement and others will be a major headache. Some will not want to follow your 810 specifications - and some will have no problems following your specs. Some will be super easy to work with and some will not.

Could you conceivably get 1 per week for 3 weeks, 2 per week for 8 weeks and finally 3 to 4 per week? Sure. It's

possible. it may even be probable. But it may never happen, too.

Also, if any of your vendors use 3rd party EDI providers, then you could - COULD - conceivably have a dozen in a week - based on how many use one of these 3rd party providers.

A lot of the speed of the ability of your trading partners to get up and running on your document does revolve around how quickly your trading partner can get the process running on their side, with their own internal policies, programs and systems. Could be that they're already "booked" for testing and compliance for the next 9 months and they don't do any changes to the system at the end of the year. So now you're looking at 2010 before you can get them tested, let alone into production.

Setting up an EDI trading partner is a painful experience. Not because it is technologically difficult, perhaps boring, but not difficult. The challenges come from trying to manage the implementation processes. Let me list some of the areas of challenge:

1. Get your internal business units and IT department to understand and define the data they need from the trading partner. If you use SAP, what IDoc can be used?
2. Find the appropriate EDI standard and transaction set for this purpose (Not always as easy as it sounds). Where do you start? Someone needs an education and mentoring through this process.
3. Customize the transaction set to match your requirements (this means buy the EDI Standards Guides and a specification editor), read it, understand it, customize it and publish your EDI specifications in the form of a EDI Guideline. Send this to your trading partner. The trading partner will often ask you to review their existing EDI Guidelines to see if it is already acceptable (more time investment) .
4. Get all the contact names from your trading partner that will be involved in the EDI implementation process. Often this list will include: Database Administrators, Project managers, IT security experts, EDI specialists, Systems Analysts, Business Analysts, EDI Managers, etc. Here is one problem, many of these folks report to different managers in different departments with different priorities. Someone needs to talk with all of these managers, get permission to use their people and get them on your schedule. This is not easy.
5. You need some kind of database application or CRM to keep track of all these contacts names, titles, roles, phone numbers and email addresses. You need to know which of these contacts needs to approve the various parts of the implementation process. You need a complete Project Plan.
6. If there are large numbers of trading partners, their implementations need to be prioritized. The business unit should do this. Get this task on their schedules.
7. Once you have an internal list that is prioritized, you must get the implementation process on the calendars of your trading partners. They most often have different projects and priorities than you. Align your schedules.
8. Your EDI partner needs to agree to do business with you via an electronic data interchange. This most often requires a signature on a legal document called a Trading Partner Agreement. This requires getting the trading partner reviewed by all legal departments.
9. Once the trading partner agreement makes it through the legal departments and has been signed each partner must configure their own EDI translators to enable the data exchange. This configuration task is hard on the eyes and is boring. A person must read the EDI guideline line-by-line and systematically configure the EDI translator to match the specification. This is hard on the eyes and very boring. It is hard to get the best and brightest in your IT department to enjoy this task and get motivated at the thought of supporting this for the next 20 years.
10. Once both parties have configured their EDI translators they need to be tested. How does one test this system? This again, is a painful process. Somehow test data, that matches the requirements of your EDI specification, must be generated. When you ask for volunteers - no one raises their hand for this process.
11. Testing, testing and re-testing. You can't afford to have high volume and valuable business information screwed up in the EDI system. Make sure your test data is good. Oh by the way - which party should make the test data. No one wants this job and everyone hopes the other trading partner will create it.
12. Testing the EDI data is just one part of the test. The EDI data needs to be integrated into your ERP system. Who develops and tests that part? Which manager needs to give up resources to work on this?
13. Oh no! The security guy and the DBA says they won't allow direct integration with their database. OK, someone needs to develop an API layer. Who do I need to ask about this? What developers do I need? Who will give up their resources when they are already behind schedule on other mission critical IT projects?
14. Everything works now...except my trading partner needs to wait for IT development resources to integrate their side of the EDI process. This will delay the project for 5 weeks.
15. It would all be manageable with one trading partner, painful but manageable. The problem is the business wants me to implement 486 suppliers and customers. They want them all on B2B/EDI NOW!!!!

16. Should I just request more IT resources - the problem is the business has been cutting costs by outsourcing IT, they are not interested in adding more headcount. OK, can some of this work be contracted to a managed EDI and B2B services providers? The answer is likely yes.