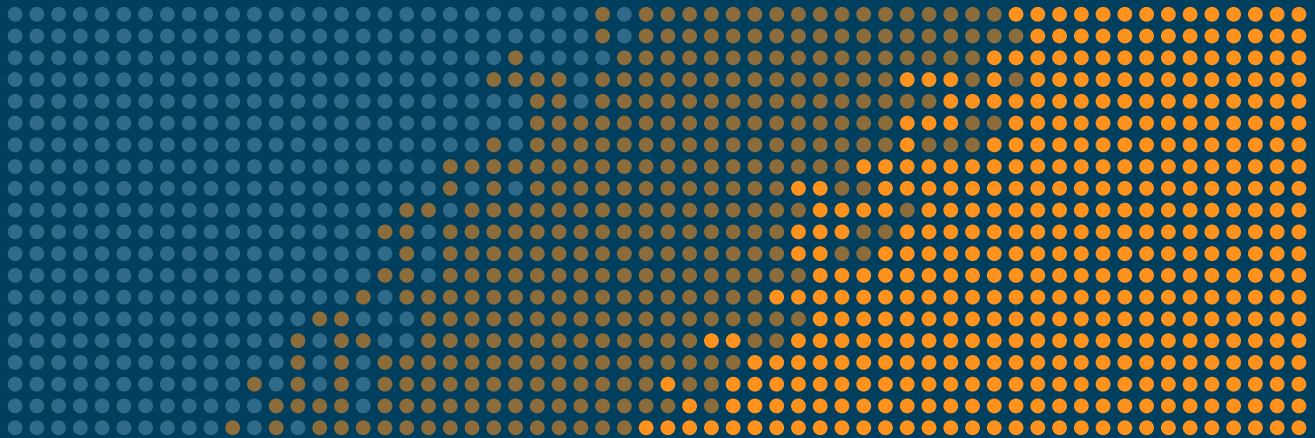


ENTERPRISE INTEGRATION FIELD GUIDE

Enterprise EDI Migration

How to Move Thousands of Maps Without
Downtime



1,200
MAPS

Moved from OpenText Liaison to IBM Sterling. Zero unplanned downtime. Featured at IBM TechXchange 2025.

Map rationalization. Convert-versus-rebuild. Partner sequencing. Cutover.

ENTERPRISE INTEGRATION FIELD GUIDE

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EXECUTIVE SUMMARY

Migration Is High-Risk By Design

A controlled cutover and an outage differ by one thing: a method.



Moving a trading partner and map estate from one EDI platform to another is not a lift-and-shift.

A purchase order that fails to arrive, or an invoice that never transmits, does not pause politely while a migration gets sorted out. What separates a controlled cutover from an outage is a method: a full map inventory before anything moves, a clear disposition for every map, a sequence built around partner risk, and a rollback trigger agreed before anyone needs it.

This guide lays out that method in the order a migration team actually needs it: why the status quo carries growing risk, how to choose a destination platform, how to inventory and rationalize a large map estate, how to sequence trading partners, how to execute a phased cutover with parallel-run validation, and how to close out the legacy environment once the new platform earns its keep.

1,200

maps migrated, OpenText
Liaison to IBM Sterling

0

unplanned downtime hours
across the cutover

2025

featured at IBM TechXchange

That result sits behind this guide as evidence. Chapter 9 walks through it directly. Everywhere else, the method comes first.

WHY MIGRATE • CHAPTER 01

The Cost of Standing Still

A working EDI platform and a safe one stop being the same thing the moment support starts to thin.

CHAPTER 01 OF 11

A meaningful number of mid-market manufacturers and distributors with long trading histories still run a legacy EDI platform such as Gentran. These environments tend to work, in the narrow sense that transactions still flow. They also carry risk that compounds every year the platform stays in place without a clear modernization path, and that risk grows whether anyone touches the system or not.

Five ways standing still gets more expensive

- 1 **Tribal knowledge:** it concentrates in a few long-tenured staff. Lose one, and nobody fully understands how to safely change a system that still works.
- 2 **Shrinking vendor support:** patches and support narrow on older platforms, raising security and compliance exposure the longer they stay in production.
- 3 **Moving trading partner requirements:** retailers update implementation guides and protocols on their own schedule. A platform untouched for years quietly falls out of compliance.
- 4 **A shrinking talent pool:** fewer EDI professionals today have deep experience with older platforms, so the pool of people who can support one keeps shrinking, regardless of who leaves and when.
- 5 **Aging infrastructure:** on-premises hardware adds its own failure risk, and replacement parts and compatible OS versions get harder to source every year it goes untouched.

GENTRAN ESTATE

What surfaces once someone looks

Gentran maps that accumulated over years commonly carry custom logic, workarounds, and trading-partner-specific exceptions built to handle a single exception years ago. Current staff often do not know these workarounds exist until a migration project surfaces them. Documenting the business reason behind each one gives the organization a clearer picture of its own trading partner requirements than it had going in.

GUT
CHECK

If your most senior EDI administrator left tomorrow, how many maps would nobody else fully understand?

WHY MIGRATE • CHAPTER 02

Choosing the Destination Platform

Sterling, Boomi, and Cleo each win for a different organization. Brand recognition decides too many of them.

CHAPTER 02 OF 11

Sterling, Boomi, and Cleo dominate the mid-market to enterprise EDI conversation. All three are mature, capable platforms. The right fit comes down to organization size, existing tech stack, and how much integration matters beyond pure EDI.

	IBM Sterling	Boomi	Cleo
Best fit	Large enterprise, high volume, complex partner mix	Organizations needing EDI plus broad app/API integration	Mid-market, EDI-focused, lean team
Strength	Deepest install base, broadest protocol coverage	Cloud-native, consolidates integration tools	Purpose-built onboarding, shorter timelines
Trade-off	More specialized admin expertise required	Paying for integration breadth a pure-EDI buyer may not need	Less suited to heavy non-EDI integration needs
Watch for	Version currency; older versions lose vendor support	Retail-specific content depth versus an EDI-first platform	Ceiling on complexity as the business scales

Sterling, Boomi, and Cleo: fit depends on scale and how much of the need sits outside pure EDI.

■ Matching platform to organization, not the other way around

Size and complexity decide it, not brand preference.

- Large enterprise, high volume, complex partners: Sterling's depth wins.
- Mid-market, wants manageable complexity: Cleo tends to fit better.
- Integration needs beyond EDI: Boomi's broader platform pays off.

■ If Sterling is the platform being left, Boomi or Cleo usually catch it

Boomi

Fits broader integration needs, internal apps, e-commerce, API partners. Consolidates multiple tools into one, with a steeper learning curve.

Cleo

Fits a leaner EDI-only need. Stays narrowly on maps and protocols, usually a faster timeline.

GUT
CHECK

Is the platform decision being made on fit against your trading partner mix, or on which vendor name is most familiar in the room?

WHY MIGRATE • CHAPTER 03

Build vs. Buy

The build path looks cheaper for exactly as long as the comparison stops at year one.

● ● ● CHAPTER 03 OF 11

Every growing company running EDI eventually asks the same question: build and maintain this capability internally or license a platform and put internal resources elsewhere. The companies that get this wrong tend to decide on upfront costs alone, without accounting for what each path actually demands over the following five years.

What each path demands

Build

Full control over configuration, timelines, and priorities. Nothing waits on a vendor's release schedule. That control costs staffing: maintaining maps, monitoring transactions, and troubleshooting failures is an ongoing job, not a one-time project.

Buy

The vendor carries the translation engine, updates, and often pre-built maps. New partners onboard faster since the platform already knows common standards. The trade-off: less control, and a licensing cost that scales with usage.

Scenario	What it looks like
YEAR ONE	
Build looks cheapest	No licensing fee to compare against, so build wins on paper.
Buy carries a visible cost	Licensing fee is predictable and covers ongoing standard updates.
YEARS THREE TO FIVE	
Build's real cost hides	Maintenance cost is variable and grows with every new trading partner and standard update; concentrates critical knowledge in a small team.
Buy's burden shifts to the vendor	Ongoing cost scales with usage, but removes the burden of building and maintaining translation infrastructure from scratch.

The build-versus-buy comparison flips once the model runs past year one.

Modeling the real five-year cost

Run three scenarios, current volume, moderate growth, aggressive growth, against both build and buy. The path that looks cheaper today often doesn't stay cheaper as volume grows. Add turnover risk as its own line: build concentrates critical knowledge in a few people, and losing one changes the math fast.

**GUT
CHECK**

If your best EDI person left next month, would your build cost model still hold?

HOW TO PLAN IT • CHAPTER 04

Map Inventory and Rationalization at Scale

The migration that fails is usually the one that never actually counted what it was moving.

CHAPTER 04 OF 11

A four-figure map estate accumulates the same way any large inventory does: one map at a time, over years, across staff turnover, acquisitions, and trading partner changes that nobody went back and reconciled. Before any conversion work starts, the estate needs an honest count. Not the number in the platform's map list, the number of maps actually carrying live transaction volume, tied to a trading partner who is still trading.

■ The Map Disposition Matrix

Sort every map against two questions: is the trading partner behind it still active, and does the map carry standard logic or logic customized for that specific partner. The answer places every map on one of four paths.

	STANDARD LOGIC	CUSTOMIZED LOGIC
PARTNER ACTIVE	Fast-Track Migrate Automated conversion candidate, minimal manual review, earliest wave.	Convert With Documentation Manual review required; document the business reason for every custom rule before converting it.
PARTNER DORMANT OR UNCONFIRMED	Verify Then Decide Confirm actual transaction activity with the trading partner before committing either way.	Archive Candidate Highest risk of quiet data loss if retired without review; confirm dead, then archive rather than migrate.

The Map Disposition Matrix: two questions sort a four-figure map estate into a scoped plan.

■ Building the inventory the matrix runs on

THE TRAP

A map with zero recent transactions looks dead, but might just be seasonal. Retire it on assumption, and you lose a live partner relationship by mistake.

MOVE 1 CHECK REAL DATA

Cross-reference every map against trailing twelve-month transaction volume, not its setup date or last-modified timestamp.

MOVE 2 CONFIRM WITH A CONVERSATION

Transaction data alone can't tell you why a partner dropped one document type but kept two others. Ask them. Build that outreach into the inventory phase, not as an afterthought.

INVENTORY PASS

What surfaces once someone looks

Map inventories run against real transaction data consistently turn up dead maps nobody remembered building, duplicate maps created when a partner relationship changed names without a proper update, and custom logic built years earlier for an exception that no longer applies. None of these shows up by reading the map list. It shows up by cross-checking every map against what moved through it recently.

GUT CHECK

Does your map count come from the platform's list, or from actual trailing-twelve-month transaction data?

HOW TO PLAN IT • CHAPTER 05

Convert or Rebuild?

Every map earns one of three paths. Getting the split wrong is where migration budgets actually go.

● ● ● ● **CHAPTER 05 OF 11** ● ● ● ● ● ● ● ●

Once the Map Disposition Matrix sorts the estate, each map in the Fast-Track and Convert-With-Documentation groups still needs a specific execution decision: automated conversion, manual rebuild, or retirement. That decision, made map by map rather than as a single blanket policy for the whole estate, is what keeps a large migration's budget and timeline realistic.

■ Three paths, and what each one earns

Path	Fits when	Why
Automated conversion	Standard logic, common transaction sets	Tool handles translation; manual review just confirms output
Manual rebuild	Custom logic or exceptions a tool can't reproduce	Forces documentation of why each customization exists
Retirement	Confirmed-dead partner, or a renamed duplicate	Skips wasted effort converting something that never needed to move

■ Where the split gets decided

- Simple map, low-volume partner → automated conversion.
- Simple map, high-volume or compliance-heavy partner → manual rebuild anyway. The cost of an error there is too high to risk.
- Any tier, before committing → test a sample first. Ninety percent clean justifies automated.

BUDGET RISK

The pattern behind most conversion cost overruns

Migration budgets built on an assumption that most maps qualify for automated conversion tend to run over once the team discovers how much custom logic exists in the estate. Running the sample-conversion check early, before finalizing the budget and timeline, catches this gap while it is still cheap to adjust the plan.

**GUT
CHECK**

Has your conversion tool actually been tested against a sample of your real maps, or only against the vendor's demo data?

HOW TO PLAN IT • CHAPTER 06

Trading Partner Sequencing

Technical migration rarely sets the pace. Partner notice periods and testing capacity usually do.

● ● ● ● ● **CHAPTER 06 OF 11**

Once maps carry a disposition and an execution path, the remaining planning question is sequence: which trading partners move first, how much notice each one needs, and how re-certification testing gets scheduled so testing capacity, not engineering capacity, becomes the real bottleneck.

■ Sequencing by risk, not by convenience

Tier	Profile and sequencing logic
Tier 1	Low-volume, standard-document partners. Shortest notice period, earliest wave, used to validate the migration process itself.
Tier 2	Moderate-volume partners with some customization. Second wave, benefiting from lessons learned in Tier 1.
Tier 3	High-volume retail relationships with strict compliance timelines. Longest notice period and re-certification lead time; last wave, moved only once earlier waves validate cleanly.

Sequencing by risk tier, not alphabetically or by convenience, keeps early mistakes cheap.

■ Re-certification is frequently the actual critical path

Many retailers require a formal re-certification or testing process before accepting production transactions on new connection details, and that process runs on the retailer's calendar, not the migrating organization's. Building re-certification lead time into the sequencing plan from the start keeps testing capacity from becoming an unplanned bottleneck late in the project.

Communication with each trading partner deserves its own line item well before a wave's cutover date. A trading partner unaware that connection details are changing as part of a planned wave can misread a validated, controlled cutover as an unexpected disruption on their end, generating support tickets for reasons that have nothing to do with the migration's actual technical success.

**GUT
CHECK**

Do you know each Tier 3 partner's actual re-certification lead time, or are you estimating it?

HOW TO EXECUTE IT • CHAPTER 07

Phased Migration and Parallel-Run Validation

The fear behind every delayed migration is the same. A phased approach exists to remove it.

● ● ● ● ● ● ● CHAPTER 07 OF 11

The fear that keeps organizations delaying an overdue EDI platform migration is almost always the same: a cutover that goes wrong and takes trading partner connections down with it. A phased approach exists specifically to make that risk manageable, moving trading partners in controlled waves instead of attempting one high-risk cutover.

■ Why all-at-once migrations fail

One event, no way back

A single-cutover migration moves every trading partner connection at once, typically over one weekend, with no fallback once the old platform is decommissioned.

All validation, one narrow window

Every map, protocol connection, and certificate needs testing before go-live, and running that under time pressure across dozens or hundreds of partners at once is exactly where mistakes get missed instead of caught.

■ Parallel running: the actual safety net

During each wave, the old and new platforms run in parallel for a defined validation period, with the new platform's output checked against the old platform's known-good behavior before the old connection retires for that trading partner. This parallel period eliminates downtime risk in practice, because the fallback path stays available until confidence in the new configuration is fully established.

Parallel running carries the operational and licensing cost of two platforms at once for a period. That cost is the price of migration safety, and budgeting for it explicitly is what keeps a team from shortening it under pressure.

WHERE SAFETY MARGIN GETS LOST

The line item migrations cut first, and shouldn't

Migrations under timeline or budget pressure most often cut parallel running first, since it looks like the easiest line item to trim. It is exactly the wrong place to cut: skipping parallel running to save on overlap cost is how migration teams end up with the downtime they were trying to avoid in the first place.

**GUT
CHECK**

Is parallel running in your budget as a line item, or is it the thing that gets cut if the timeline slips?

HOW TO EXECUTE IT • CHAPTER 08

Cutover, Rollback, and the Go/No-Go Gate

A migration plan worth trusting names its rollback trigger before the wave starts, not while it is failing.

● ● ● ● ● ● ● **●** ● ● ● CHAPTER 08 OF 11

Cutover for each wave is a checklist, not a single moment: every map confirmed producing correct output, every acknowledgment received and processed correctly, and every trading partner notified of any change to their connection details. Only once that checklist clears does the old connection for that wave formally retire.

■ The rollback trigger comes first, not last

Every wave needs an explicit rollback trigger, agreed before cutover, not decided under pressure once something breaks.

Deciding triggers in the moment is how avoidable outages happen even inside a well-planned migration. Each wave also needs one named person who owns the go or no-go call, briefed before the window opens, so the decision doesn't stall mid-cutover.

■ The Go/No-Go Readiness Check

Before any wave reaches its gate, run it against four plain checks. No scoring, no weighting: every box needs to be checked before the wave proceeds.



Map Inventory Confirmed

Every map in this wave carries a confirmed disposition from the Map Disposition Matrix, validated against real transaction data, not assumed.



Partner Sequencing Cleared

Every partner in this wave has cleared re-certification requirements and received notification with adequate lead time.



Parallel-Run Capacity Secured

Budget, licensing, and staffing are in place to run both platforms for this wave's full validation period, not a shortened one.



Rollback Trigger and Owner Named

A specific rollback trigger and a named decision-maker exist for this wave, agreed before cutover begins.

Four checked boxes means the wave proceeds. Any open box means the wave waits, regardless of the calendar date.

**GUT
CHECK**

For the next wave on your plan, which of those four boxes is still open?

THE METHOD AT SCALE • CHAPTER 09

A 1,200-Map Migration

The method in Chapters 4 through 8, run against a four-figure map estate with zero unplanned downtime.

● ● ● ● ● ● ● ● CHAPTER 09 OF 11

Every method in this guide reflects a migration DiviHN ran for a logistics provider with roughly \$3.3 billion in revenue, moving approximately 1,200 trading partner maps from OpenText Liaison to IBM Sterling. IBM featured the engagement at TechXchange 2025. What follows is the shape of that migration as evidence for the method in Chapters 4 through 8, not as a story told for its own sake.

1,200

trading partner maps in scope

\$3.3B

approximate revenue of the logistics provider

0

unplanned downtime hours across the cutover

■ Applying the method

MAP INVENTORY

The engagement opened with a full map inventory, run against actual trailing transaction data rather than the platform's map list. That inventory sorted the estate through the Map Disposition Matrix, separating fast-track conversion candidates from maps needing manual rebuild and documentation.

PARTNER SEQUENCING

Trading partners moved in risk-ordered waves: lower-volume, standard-document partners first, validating the conversion approach while the impact of any early mistake stayed contained. Higher-volume relationships with strict compliance timelines moved once earlier waves validated cleanly.

PARALLEL RUNNING

Each wave ran the old and new platforms in parallel through its full validation period before the OpenText Liaison connection retired. Every wave cleared a go/no-go gate with a named rollback trigger before cutover.

WHAT THIS CHAPTER CONFIRMS

A note on scope

This chapter uses the confirmed facts of the engagement: approximately 1,200 maps, OpenText Liaison to IBM Sterling, an anonymized \$3.3 billion logistics provider consistent with current site copy, and the IBM TechXchange 2025 feature. The team should confirm additional specifics, such as the exact wave count, migration duration, and team composition, before publication and add them here to give readers a fuller picture of the timeline.

GUT CHECK

What would your own version of this chapter say, if you ran your migration today?

AFTER GO-LIVE • CHAPTER 10

Decommissioning the Legacy Environment

The step most migrations defer indefinitely and pay for every month it stays deferred.

● ● ● ● ● ● ● ● ● CHAPTER 10 OF 11

A migration that completes its last wave but never formally decommissions the legacy platform leaves an organization paying for and maintaining two environments instead of one. This step gets deferred more often than any other, usually because nothing forces it the way a cutover deadline forces the migration itself.

■ The decommissioning checklist

- ☐ **Confirm zero transaction volume** on the legacy platform for a full business cycle, including peak season for a seasonal business, before decommissioning anything.
- ☐ **Revoke certificates and terminate connections** tied to the legacy platform once every trading partner has confirmed successfully on the new platform.
- ☐ **Archive historical transaction data** according to the organization's actual retention policy, rather than defaulting to keeping everything indefinitely or deleting it prematurely.
- ☐ **Cancel legacy licensing and infrastructure contracts** on a specific date tied to the decommissioning checklist, not left open-ended after go-live.
- ☐ **Document lessons learned** while the team that ran the migration is still assembled, since that knowledge is the hardest thing to reconstruct later.

**GUT
CHECK**

Does your migration plan have a decommissioning date, or does it end at the last cutover?

AFTER GO-LIVE • CHAPTER 11

Protocol Modernization as the Next Step

Migrating the platform and modernizing the protocol are two separate projects.



CHAPTER 11 OF 11

Completing a platform migration answers where trading partner maps and connections live. It does not answer what protocol those connections use to actually move data, and organizations that just completed a platform migration sometimes look at their AS2 or VAN connections next and wonder whether now is the time to modernize those too.

Migrating the platform and modernizing the transmission protocol, moving toward AS4 where trading partners support it, are separate projects with separate timelines and separate risk profiles.

Bundling them into one project multiplies the variables the team has to validate at once, which works against the wave-based, one-variable-at-a-time discipline that made the platform migration itself successful.

A separate guide in this series covers AS4 migration specifically: what it changes relative to AS2, which trading partners can support it, and how to sequence that transition on its own timeline. The platform migration this guide covers is the right foundation to complete first, on its own, before opening the protocol question as a distinct next project.

**GUT
CHECK**

Is an AS4 conversation on the table because a partner or regulation is asking for it, or because the platform migration just made protocol feel like the next obvious task?

CLOSING

A Method, Not a Story

Every step is repeatable, on any migration, at any scale.

Moving thousands of maps without downtime is not a matter of luck or a heroic weekend.

It is a full inventory before anything moves, a disposition for every map, a sequence built around trading partner risk, a phased cutover with parallel running as the safety net, and a rollback trigger agreed before anyone needs it. Every one of those steps is repeatable, on any migration, at any scale.

■ Start here

1**Run the Map Disposition Matrix against real transaction data (Ch. 4)**

It replaces a single all-or-nothing migration decision with a scoped, sequenced plan.

2**Run the Go/No-Go check before scheduling any cutover date (Ch. 8)**

It turns a felt sense of readiness into a plain pass/fail decision, not a guess.

3**Budget parallel running explicitly, and never shorten it under pressure (Ch. 7)**

It is the mechanism that actually removes downtime risk, not a nice-to-have.

APPENDIX

The Enterprise Migration Readiness Checklist

The Go/No-Go check from Chapter 8, built as a live companion tool.

The Go/No-Go Readiness Check in Chapter 8 works as a manual exercise, wave by wave. This appendix specs the same four checks as an interactive companion tool a migration team can run live instead of walking through a printed list each time.

■ Checklist structure

- Four checks, each a plain yes or no: Map Inventory Confirmed, Partner Sequencing Cleared, Parallel-Run Capacity Secured, Rollback Trigger and Owner Named.
- Each check expands into 2 to 3 short prompts drawn directly from the criteria in Chapter 8, so a partial “yes” surfaces exactly what is still open rather than passing on a technicality.
- A wave-name field at the top lets a team run the check separately for each wave, since readiness is a per-wave measure, not a one-time project status.
- The result is binary by design: all four checked means proceed, any box open means wait, with a specific next step named for whichever check is still open.

■ Why this is worth building alongside the ebook

An interactive checklist gives a visitor a two-minute reason to hand over contact information in exchange for a clear go or no-go answer, which converts more reliably than a static ebook download on its own. Building both, the ebook as the method and the checklist as the live tool that applies it, gives the microsite two connected assets instead of one.

ABOUT & GET STARTED

About DivIHN

Technology, Cybersecurity & Workforce Solutions

DivIHN Integration Inc. delivers technology, cybersecurity and workforce solutions to federal, state, local, education and commercial clients.

**DoD TS FCL****DOE Q Cleared****CMMI** DEV | ML3
APPRAISED

Ready to move your maps without downtime?

Talk to DivIHN about an EDI migration assessment built on the method in this guide, from map inventory through cutover and decommissioning.

www.divihn.com