MERCURY

Integration with Other Systems (e.g., ERP, CRM)



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Introduction:

In today's digital enterprises, information silos hinder agility, performance, and collaboration. This Integration with Other Systems e.g., ERP, CRM training course equips Enterprise Content Management ECM Architects with advanced integration capabilities essential for aligning SharePoint Online SPO with core enterprise platforms. Organizations are increasingly requiring unified platforms to streamline operations, data workflows, and decision-making processes.

This Integration with Other Systems e.g., ERP, CRM course provides a practical and strategic foundation for implementing seamless integrations across various enterprise systems, including ERP and CRM. Participants will explore integration strategies, middleware tools, and real-world scenarios for enhancing ECM functionality.

By mastering integration architecture and deployment practices, learners will support business process optimization and digital transformation. The Integration with Other Systems e.g., ERP, CRM program emphasizes low-code/no-code solutions, secure APIs, and adaptive connector configurations for modern enterprise environments.

Targeted Groups:

This Integration with Other Systems e.g., ERP, CRM training targets professionals seeking specialized knowledge and skills:

- ECM architects who want to design integrated content solutions.
- SharePoint developers are aiming to connect SPO with ERP and CRM platforms.
- IT system integrators are responsible for enterprise-level integrations.
- Business analysts are working on automating and aligning systems.
- Digital transformation managers are seeking data consistency.
- Information governance professionals are improving system interoperability.
- Technical project managers leading ECM integration projects.
- System administrators are transitioning to cloud-based integration tools.
- Solution architects work across multi-system environments.
- Professionals in enterprise content and knowledge management.

Course Objectives:

Participants will achieve the following objectives by completing the Integration with Other Systems e.g., ERP, CRM course:

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- Understand the foundational principles of ECM system integration.
- Identify key integration challenges between SharePoint Online and ERP/CRM systems.
- Evaluate different architecture approaches for seamless connectivity.
- Utilize integration tools, including APIs, Microsoft Power Platform, and Azure Logic Apps.
- Design robust workflows that enhance data accuracy and minimize manual data entry.
- Build secure and scalable integration models aligned with governance policies.
- Test and validate integrations across multiple environments to ensure seamless functionality.
- Troubleshoot performance bottlenecks and manage data synchronization.
- Create reusable integration templates for future projects.
- Enhance collaboration by synchronizing the content lifecycle across interconnected systems.
- Monitor integration success using analytics and reporting tools to ensure seamless operation.
- Adapt integration models to support future system upgrades and scalability.
- Develop documentation and standards for sustainable integration and interoperability.
- Ensure compliance and risk mitigation in multi-system operations.
- Enhance digital continuity through intelligent data mapping and transformation.

Targeted Competencies:

Participants will gain the following competencies during the Integration with Other Systems e.g., ERP, CRM program:

- Strategic planning for ECM integration in complex environments.
- Designing scalable and efficient system architectures.
- Implementing secure APIs and custom connectors.
- Developing business process automations across platforms.
- Troubleshooting and optimizing SharePoint Online integrations.
- Ensuring data integrity in multi-system communication.
- Interpreting system logs and performance reports.
- Leading technical integration initiatives effectively.
- Applying best practices in information governance and compliance.
- Mapping system data structures across different platforms.

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Course Content:

Unit 1: Foundations of ECM Integration with ERP and CRM:

- Understand enterprise system architecture and the role of SPOs.
- Identify typical integration scenarios and use cases.
- Explore SharePoint Online as a central ECM platform.
- Compare key features of ERP and CRM systems SAP, Oracle, Salesforce, Dynamics 365.
- Assess common challenges in integrating content across platforms.
- Examine the differences between structured and unstructured data in enterprise systems.
- Define integration goals and success metrics.
- Explore metadata mapping and information architecture alignment.
- Review case studies demonstrating ECM and ERP/CRM alignment.

Unit 2: Integration Technologies and Tools:

- Introduction to REST APIs and Graph API in SharePoint.
- Leverage Microsoft Power Automate for low-code integrations.
- Use Azure Logic Apps and Azure Functions for scalable operations.
- Understand connectors for Dynamics 365, Salesforce, and SAP.
- Design integration workflows using Power Platform.
- Implement Single Sign-On SSO and identity federation for system access.
- Explore middleware options e.g., MuleSoft, Dell Boomi, Zapier.
- Evaluate the pros and cons of native vs. third-party connectors.
- Configure secure communication protocols and encryption models to ensure secure data transmission.

Unit 3: Designing and Implementing Integration Architecture:

- Establish requirements and system compatibility analysis.
- Map data flows and business processes between systems.
- Create entity-relationship diagrams ERDs across platforms.
- Plan integration layers: presentation, logic, and data.
- Implement synchronous and asynchronous integration models.
- Design fault-tolerant and scalable architectures.
- Configure triggers and actions in multi-system workflows.
- Develop integration logic using JSON and XML formatting.
- Document architecture using standard frameworks e.g., TOGAF, ArchiMate.

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Unit 4: Testing, Monitoring, and Governance:

- Create test plans for different integration stages.
- Use Postman and Azure Monitor to validate API interactions.
- Implement logging strategies for real-time monitoring.
- Handle error responses, retries, and timeout events.
- Track user activity and audit trails in SharePoint and ERP/CRM systems.
- Apply governance models to integration processes.
- Ensure compliance with GDPR, HIPAA, and industry-specific regulations.
- Establish maintenance plans and performance reviews.
- Measure KPIs for integration success e.g., data accuracy, sync rates.

Unit 5: Use Cases, Templates, and Future-Proofing:

- Integrate SharePoint Online with Dynamics 365 for document automation.
- Connect SharePoint to SAP for procurement workflows.
- Build a CRM-driven customer onboarding workflow using Power Automate.
- Use Logic Apps to sync data between SharePoint and Oracle ERP.
- Leverage Microsoft Dataverse for unified data models.
- Create reusable integration templates with governance controls.
- Build future-proof integrations adaptable to platform upgrades.
- Enable AI-powered document classification across systems.
- Plan for hybrid environments and cloud-to-on-premise bridging.

Final Insights & Key Takeaways:

Integrating SharePoint Online with ERP and CRM systems is crucial for maximizing the effectiveness of Enterprise Content Management ECM. This Integration with Other Systems e.g., ERP, CRM course empowers professionals to build secure, scalable, and intelligent integrations across enterprise systems. By connecting platforms, organizations can streamline processes, reduce redundancy, and unlock actionable insights. Participants leave with practical skills and strategic insight for managing enterprise-wide integrations.