

WHITE PAPER

Microsoft Office SharePoint Server 2007 Integration to ERP and CRM Systems

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"SharePoint metadata is all messed up. Backup jobs are crashing. Office integration is confusing. The server needs more memory. The workflow is all wrong. User privileges need to be updated. Custom apps aren't getting written. Managers are screaming, users are whining – and processor utilization is still too high!"

– David Rubinstein, SD Times

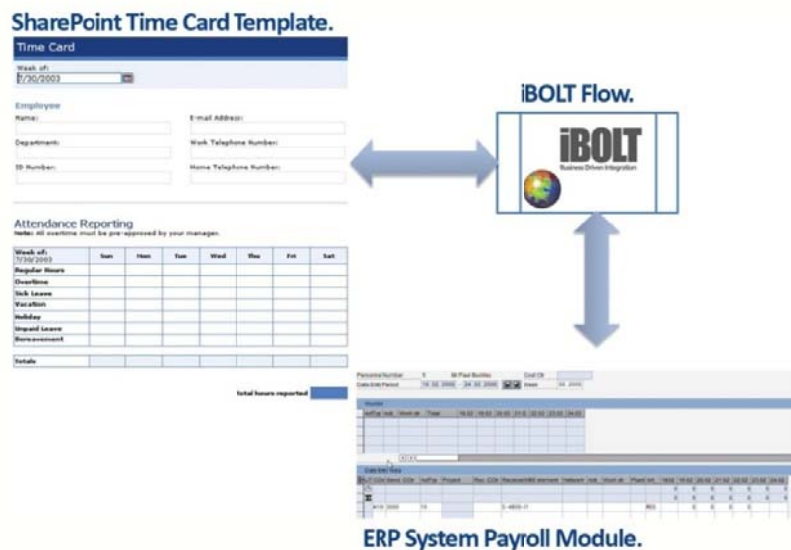
With friends like these, who needs enemies?’ you might ask. But David Rubinstein is actually promoting SharePoint training and education -- he is the host of the best [SharePoint conferences](#) in the industry. He makes a good point that despite all the great benefits of Microsoft Office SharePoint Server 2007 (MOSS 2007), the metadata is troubling. That doesn't mean you can't work with SharePoint Designer, it just means you had better use a systematic approach to SharePoint integration or you may get bogged down in massive development efforts involving thousands of lines of code and leading to an IT backlog that exacerbates the problem SharePoint is designed to solve.

Having an automated way to deal with ERP and CRM integration to [Microsoft Office SharePoint Server 2007 \(MOSS 2007\)](#) is a step in the right direction. Many users run industry standard ERP systems like JD Edwards World, J.D. Edwards EnterpriseOne, Oracle eBusiness Suite, SAP ERP, SAP Business One or other ERP systems such as Lawson, QAD, MAS 500 or Infor and want to share data between those ERP systems and their SharePoint portal. Sometimes a third party CRM system is involved such as Salesforce.com, Remedy or Siebel. One might assume that integration would be easier with Microsoft products than with these aforementioned ERP and CRM systems. But look at David's statement again. "Office integration is confusing," he says. This integration confusion exists for a product with the words "Microsoft Office" in the title. Imagine connecting to Microsoft CRM or Microsoft Dynamics GP, Microsoft Dynamics NAV, etc. BizTalk, some would argue, just makes matters worse and more complex. Integration to SharePoint doesn't get easier by using BizTalk, to be sure.

You have to have the right tool for integration, and it clearly does not have a Microsoft label on it. Magic Software Enterprises offers the iBOLT Integration Suite for integration between enterprise applications and SharePoint.

[Magic Software](#) built its reputation with rapid application development tools in the 1980s and 1990s. Its latest release of the [uniPaaS](#) application platform enables organizations to develop or enhance any type of business application and deploy the code in numerous ways: Full Client, RIA, Mobile, Web, Background and SaaS.

For integration, the [iBOLT Integration Suite](#) offers code-free integration that transforms data, routes messages and orchestrates business processes between applications and users. So iBOLT simplifies the hard integration work behind the scenes so that SharePoint continues to satisfy users as a portal and collaboration tool.



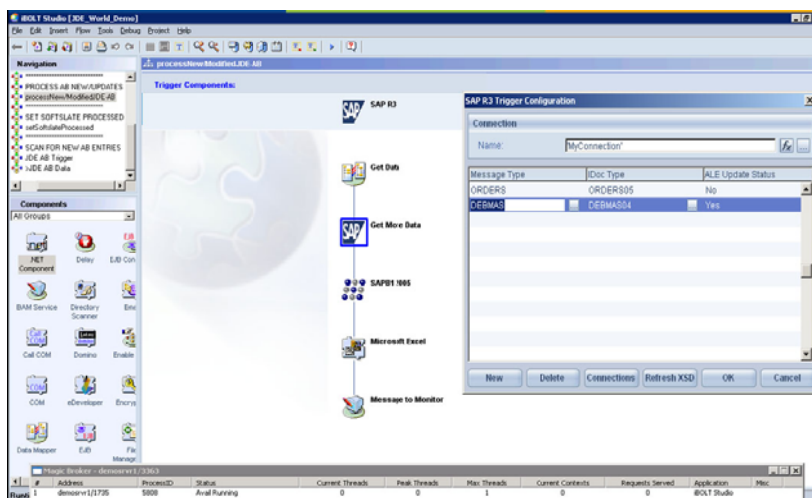
Example 1. SharePoint TimeCard Template to ERP Payroll Module Integration via iBOLT Flow.

Fortunately, Microsoft provides a number of SharePoint Templates that can help an enterprise get started with applications for a number of specific needs. The available SharePoint Templates as of June 2009 include:

- Absence Request and Vacation Schedules
- Board of Directors
- Budgeting and Tracking Multiple Projects
- Bug Database
- Business Performance Reporting
- Call Center
- Case Management for Government Agencies
- Change Request Management
- Classroom Management
- Clinical Trial Initiation and Management
- Competitive Analysis Site
- Compliance Process Support Site
- Contacts Management
- Discussion Database
- Disputed Invoice Management
- Document Library and Review
- Employee Activities Site
- Employee Self-Service Benefits
- Employee Training Scheduling and Materials
- Equity Research
- Event Planning
- Expense Reimbursement and Approval
- Help Desk
- Integrated Marketing Campaign Tracking
- Inventory Tracking
- IT Team Workspace
- Job Requisition and Interview Management
- Knowledge Base
- Lending Library
- Manufacturing Process Management
- New Store Opening
- Physical Asset Tracking and Management
- Product and Marketing Requirements
- Project Tracking Workspace
- Request for Proposal
- Room and Equipment Reservations
- Sales Lead Pipeline
- Sports League
- Team Work Site
- Timecard Management

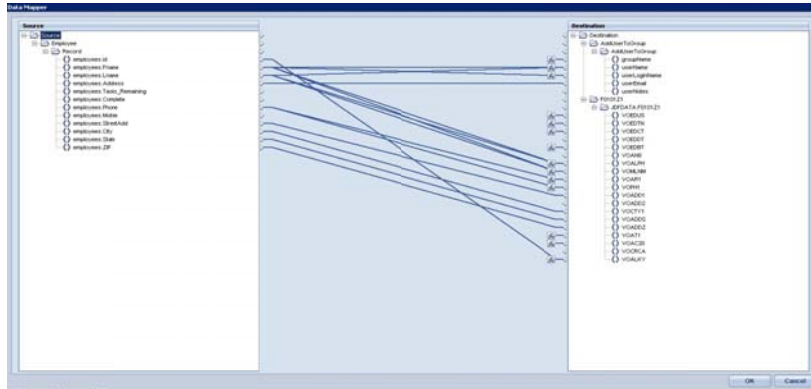
The Timecard Management template is a good example of a SharePoint application that really should be integrated with the back-end ERP system. To import Timecard Data from SharePoint to an ERP system, iBOLT can seamlessly run processes behind the scenes that bring manager approved information from SharePoint's Timecard application into an ERP system by automatically triggering employee transactions in the ERP system. If instead you engaged in manual programming to do this, 91 lines of code per field are required. In most ERP systems, scores of fields are involved. A few thousand lines of code would be required just to deal with the data. Major questions of monitoring, error recovery, exceptions management, state management, orchestration and all sorts of other issues would have to be programmed as well. iBOLT's Studio environment, allows a business analyst to create business processes using a visual drag, drop and configure approach that completely eliminates the need for tedious and expensive line-by-line programming.

iBOLT Integrates to Share Point by automating Web Services integration to Windows SharePoint Services. These are Web Services, but you don't have to write the Web Services, iBOLT handles that and all the brokering of the communications for you. With iBOLT you can interact with SharePoint's Business Data Catalog and control entities such as Sites, Lists, Content Types, Documents, and Forms. iBOLT also provides systematic approaches to integration with ERP and CRM systems. iBOLT handles all the Data Transformation, Messaging, Routing, and asynchronous Workflow management that belongs to a process involving SharePoint and enterprise applications.



iBOLT's visual integration tools speed creation of business processes that integrate enterprise software.

It is perhaps best to think of iBOLT as providing both Integration and Process Management based on Open Standards that let you Design, Deploy and Monitor business processes that connect Databases, Applications, Websites, Web services and Human Workflow. iBOLT projects manage processes at a high level and flows at the detail level. Building these flows is greatly simplified however, because flows are built from an included library of Components, Methods and Wizards. Flows can also call RPG and other programs including .NET and J2EE applications.



iBOLT's Data Mapper allows for drag and drop data mapping and includes a full expression editor for data transformations.

iBOLT's adapter library is provided with the iBOLT studio and includes all the technology adapters. In other words, they are not sold separately. There is no programming, no line by line code involved with iBOLT. While your designing your business processes, it has a straightforward process emulator that you can use to step through a flow and see the results of your process. And at run time, there is a monitor that is configurable to log integration steps and performance information as well as provide a dashboard view of latency, volume, error rates and other useful information.

For an organization currently running SharePoint and an ERP system, CRM system or other enterprise software, the Return on Existing Investment (ROEI) is attractive. Successful integration means you get the value that was originally intended from your existing IT assets when you eliminate gaps between SharePoint and your "real business." The end result is that you create efficiencies between employees and teams by eliminating barriers to information sharing and business workflow. When you accelerate the speed of your business, you can create unique competitive advantages putting you ahead in today's economic climate.