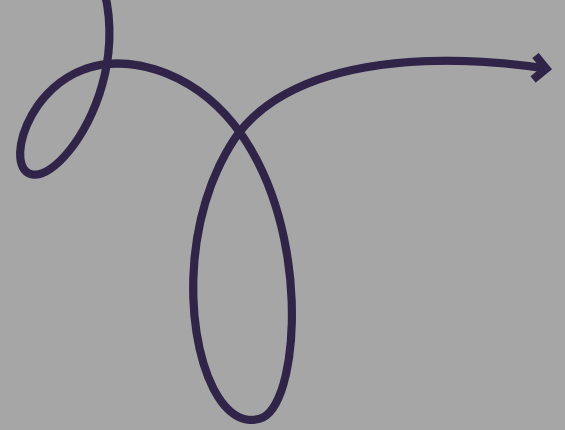


System Integration Plan Template



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Instructions and Form

The purpose of this template is to provide a structured approach for planning and executing the integration of multiple systems. It outlines the key steps, considerations, and deliverables required for a successful integration project.

This template covers the following aspects of system integration:

- Defining integration points
- Describing data flows between systems
- Identifying system dependencies
- Outlining interface specifications
- Establishing a plan for testing the integration
- Defining procedures for rolling back the integration in case of failure
- Identifying roles and responsibilities
- Establishing a communication plan
- Assessing and mitigating potential risks
- Defining criteria for sign-off and project completion

This template does **not** cover:

- Detailed design of individual systems
- Business process re-engineering unrelated to the integration
- Post-implementation support and maintenance (beyond the initial integration phase)

Instructions for the template

Project Overview

Provide a high-level description of the integration project.

Systems Involved

Identify the systems that will be integrated. For each system, provide its name, a brief description, and its role in the integration.

Integration Scope

Define the boundaries of the integration. Clearly state what is included in the integration and what is excluded.

Data Mapping

Detail how data will be exchanged between the systems. For each data element, specify the source system, source field, target system, target field, data type, and any required transformations.

Interface Specifications

Describe the technical specifications of the interfaces between the systems. Include details such as interface type, protocol, data format, authentication methods, and error handling.

Integration Testing Plan

Outline the strategy for testing the integration. Include the types of tests to be performed, test data requirements, testing environment setup, and test schedule.

Rollback Plan

Define the procedure for reverting to the previous state if the integration fails. Include steps for data recovery, system restoration, and communication.

Roles and Responsibilities

Identify who is responsible for each aspect of the integration. Include roles such as project manager, developer, tester, and system owner.

Communication Plan

Describe how information will be communicated to stakeholders. Include the frequency, methods, and responsible parties for communication.

Risk Assessment

Identify and analyze potential risks associated with the integration. For each risk, describe the likelihood, impact, and mitigation strategy.

Sign-off Criteria

Define the criteria for successful completion of the integration. This may include completion of testing, user acceptance, and sign-off from key stakeholders.

System Integration Plan

Project Overview

- **Project Title:** [Enter project name]
 - **Example:** CRM and Order Management Integration
- **Project Description:** [Describe the project]
 - **Example:** This project will integrate our Salesforce CRM with our NetSuite order management system to automate the creation of sales orders and improve order tracking.
- **Project Goals:** [List the goals]
 - **Example:**
 - Reduce manual data entry
 - Increase order processing efficiency
 - Improve data accuracy
- **Business Objectives:** [List the objectives]
 - **Example:**
 - Increase sales team productivity by 20%
 - Decrease order fulfillment time by 15%
 - Reduce order errors by 10%

Systems Involved

System Name	Description	Role in Integration
Salesforce CRM	Cloud-based customer relationship management system	Source of customer and sales order data
NetSuite	Cloud-based order management and ERP system	Target for sales orders, source of order status and product data

Integration Scope

- **In Scope: [Describe what is included]**
 - **Example:**
 - **Account and contact data synchronization**
 - **Sales order creation in NetSuite from Salesforce opportunity**
 - **Order status updates from NetSuite to Salesforce**
 - **Product data synchronization from NetSuite to Salesforce**
- **Out of Scope: [Describe what is excluded]**
 - **Example:**
 - **Integration with shipping or fulfillment systems**
 - **Customization of either Salesforce or NetSuite beyond what is necessary for the integration**
 - **Historical data migration**

Data Mapping

Data Element	Source System	Source Field	Target System	Target Field	Data Type	Transformation
Customer Name	Salesforce	Account Name	NetSuite	Customer Name	Text	None
Contact Email	Salesforce	Contact Email	NetSuite	Customer Email	Email	None
Product ID	Salesforce	Opportunity Line Item Product ID	NetSuite	Item ID	Text	None
Quantity	Salesforce	Opportunity Line Item Quantity	NetSuite	Quantity	Number	None
Order Status	NetSuite	Order Status	Salesforce	Order Status	Text	Map values (e.g., "Pending" -> "Pending," "Shipped" -> "Shipped")

Interface Specifications

- **Interface 1 Name: Salesforce to NetSuite Order Creation**
- **Systems Involved: Salesforce, NetSuite**
- **Interface Type: REST API**
- **Protocol: HTTPS**
- **Data Format: JSON**
- **Authentication: OAuth 2.0**
- **Error Handling: HTTP status codes, error logs, retry mechanism**
- **Security Considerations: Data encryption in transit, access control, regular security assessments**

Integration Testing Plan

- **Test Types: Unit Testing, Integration Testing, System Testing, User Acceptance Testing**
- **Test Data: Realistic test data set including various order scenarios (e.g., new customer, existing customer, different product types, quantities)**
- **Testing Environment: Staging environment that mirrors production**
- **Test Schedule: 2 weeks of testing, with daily progress meetings**
- **Entry Criteria: Development complete, test environment set up, test data prepared**
- **Exit Criteria: All test cases pass, user acceptance sign-off, no critical defects**

Rollback Plan

- **Rollback Trigger:** Integration failure, data corruption, critical system errors
- **Rollback Procedure:**
 1. **Disable the integration interface.**
 2. **Restore NetSuite database from backup.**
 3. **Revert Salesforce to pre-integration state.**
 4. **Verify data integrity.**
- **Data Recovery:** Database backups, transaction logs
- **System Restoration:** Automated scripts for system configuration
- **Communication Plan:** Notify stakeholders (project team, users, management) within **1 hour** of the rollback decision

Roles and Responsibilities

Role	Responsibility	Name	Contact Information
Project Manager	Overall project management, coordination	John Smith	john.smith@example.com
Developer	Develop integration components	Jane Doe	jane.doe@example.com
Tester	Execute test plan, report defects	David Lee	david.lee@example.com
System Owner A	Salesforce system owner, provide access and support	Mary Brown	mary.brown@example.com
System Owner B	NetSuite system owner, provide access and support	Peter White	peter.white@example.com

Communication Plan

- **Stakeholder Group: Project Team**
- **Communication Frequency: Daily**
- **Communication Method: Stand-up meetings, Slack**
- **Responsible Party: Project Manager**
- **Key Messages: Project status, issues, next steps**
- **Stakeholder Group: Management**
- **Communication Frequency: Weekly**
- **Communication Method: Email, status reports**
- **Responsible Party: Project Manager**
- **Key Messages: Project progress, budget, risks**
- **Stakeholder Group: Users**
- **Communication Frequency: Bi-Weekly**
- **Communication Method: Email, Release Notes**
- **Responsible Party: Project Manager**
- **Key Messages: Integration timeline, training schedule, downtime**

Risk Assessment

Risk	Likelihood	Impact	Mitigation Strategy
Data loss during migration	Medium	High	Implement robust backup and recovery procedures, perform data validation
Integration performance issues	Medium	Medium	Performance testing, optimize code and configurations
System downtime during cutover	Low	High	Plan for a phased cutover, provide a rollback plan

Sign-off Criteria

- **Criteria 1: All test cases pass with no critical or high-priority defects**
- **Criteria 2: User Acceptance Testing (UAT) is completed and signed off by key users**
- **Criteria 3: Project sponsor and system owners approve the integration**
- **Sign-off Approvers: Project Sponsor, System Owner A, System Owner B**

System Integration Plan

Project Overview

- **Project Title:**

- **Project Description:**

- **Project Goals:**

- **Business Objectives:**

Systems Involved

System Name	Description	Role in Integration

Integration Scope

- In Scope:

- Out of Scope:

Data Mapping

Data Element	Source System	Source Field	Target System	Target Field	Data Type	Transformation

Interface Specifications

Integration Testing Plan

Rollback Plan

Roles and Responsibilities

Role	Responsibility	Name	Contact Information

Communication Plan

Risk Assessment

Risk	Likelihood	Impact	Mitigation Strategy

Sign-off Criteria