Connecting Software case study

Connecting Software solution syncs Microsoft Dynamics 365 and SharePoint permissions, enabling the integrity of access rights

Access rights out of sync

Food service company Compass Group needed to synchronize document access rights between Microsoft Dynamics 365 and SharePoint.

Automatic replication

Connecting Software developed the CB Dynamics 365 to SharePoint Permissions Replicator to automatically synchronize privileges and permissions between the two systems.

Enhanced data control

Now, permission changes are monitored and any sensitive data is available in SharePoint only to users who are granted access in Dynamics 365 – data integrity guaranteed.

Microsoft

Connecting Software simplifies complex software integration

Connecting Software, established in 2007 in Vienna, Austria, develops simple, fast, and cost-effective integration solutions. It has Microsoft Azure certification, holds five Microsoft gold competencies, and in 2015 received the Microsoft Partner of the Year Finalist Award in the Windows 8 Custom App Developer category. Connecting Software's products rely on Azure and are listed on Microsoft AppSource and in the Azure Marketplace.

Compass Group operates in more than 40 countries and employs more than 550,000 people. The company manages its customer relations via Dynamics 365 integrated with SharePoint for document storage and team collaboration.

"What led us to Connecting Software's solution was the need for synchronization," said Anthony Crook, Head of Client Business Solutions for Compass Group. "Our CRM system was such a large global rollout. We spanned multiple countries, teams, and territories with one system. Out of the box, Dynamics 365 has very powerful security capabilities and a robust SharePoint integration. But our challenge was bringing these two areas together. Our in-country users deemed it unacceptable to restrict access to sales or contract information to specific teams in CRM but then allow unrestricted access to the related documentation in SharePoint. Or to manage this manually."

'Managing data access is key'

Connecting Software's CB Dynamics 365 to SharePoint Permissions Replicator is built on the company's Connect Bridge platform. Connect Bridge enables developers to quickly create integration and synchronization solutions for business apps and the Industrial Internet of Things. Connecting Software created the CB Dynamics 365 to SharePoint Permissions Replicator at the suggestion of Microsoft technical experts. It ensures that SharePoint and Dynamics 365 automatically maintain the same level of document confidentiality without requiring extra management of access rights.

"We mostly hold sales and contract information in CRM," Crook said. "Managing data access is key for ensuring that users only have access to the data they are allowed. As people come and go, it's important that no one has access to more information than they require to do their job. Thus, if people either accidently or purposefully try, they cannot overshare our clients' information. On top of this, we manage one central global solution. And each country wants to be confident that they can still operate securely as if they still used a locally owned solution."

With the CB Dynamics 365 to SharePoint Permissions Replicator, Compass Group was able to accomplish its goals of synchronization and automatically securing data and documents. And on top of that, the solution helped Compass Group comply with the European Union's General Data Protection Regulation.

"This global rollout would not be possible without Microsoft's advanced products and services. All Connecting Software's solutions are easily deployed and scaled via Microsoft Azure."

- Thomas Berndorfer, CEO, Connecting Software