

AUTOMATING PERMISSION REPLICATION: CONNECTING SOFTWARE SOLUTIONS IMPROVE DOCUMENT ACCESS AT LIEBHERR

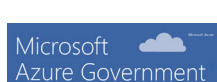


SUCCESS STORY Liebherr-Hausgeräte Ochsenhausen GmbH

LIEBHERR



Gold DevOps
Gold Data Analytics
Gold Data Platform
Gold Application Development
Gold Windows and Devices





Customer

[Liebherr-Hausgeräte
Ochsenhausen GmbH](#)



Country

Germany



Activity

Retail



Products and Services

[CB Dynamics 365 to
SharePoint Permissions
Replicator and SharePoint
Structure Creator](#)



***It was the best solution,
does exactly what we needed***

Daniel Maier, CRM Application Officer



Introduction

As Europe’s largest privately owned manufacturer of refrigerators and freezers for residential and commercial use, [Liebherr-Hausgeräte](#) produces more than 2.1 million units every year. Headquartered in Ochsenhausen, Germany, the company distributes their range of refrigeration and freezing solutions around the globe.

In their IT environment they use Microsoft Dynamics 365 for their Customer Relationship Management (CRM) needs and Microsoft SharePoint for Document Management. Let’s see how they streamlined their permission management between the two with the help of Connecting Software’s [CB Dynamics 365 to SharePoint Permissions Replicator](#) and [SharePoint Structure Creator](#).

Business Challenge

With Dynamics 365 integrated with SharePoint, all the documents in Dynamics 365 were visible in SharePoint, which had advantages in terms of collaborating on documents and version control. Nonetheless, the existing permission scheme in Dynamics 365 was complex, and the SharePoint side did not reflect that.

At one point, they realized this meant that someone who could not access a specific document in Dynamics because they were not granted permissions for it, could have access to that document in SharePoint. Realizing this was a problem eventually led to an internal request for a solution to improve permission management.

Solution

Connecting Software's CB Dynamics 365 to SharePoint Permissions Replicator and SharePoint Structure Creator were the solutions the company was looking for.

- The Permissions Replicator automates the replication of permissions between SharePoint and Dynamics 365, allowing employees to only have access to a SharePoint document if they have access to that same document in Dynamics 365. This greatly improves the company's ability to manage permissions, guaranteeing the right people have access to the right documents. Plus, the permission replication is fully automatic.
- The SharePoint Structure Creator was used to create a new folder for each entity on a weekly basis. This made the SharePoint folders smaller and more manageable for the SharePoint users, while at the same time it avoided the dreaded unique permissions limit.

Deployment

Deployment of these solutions was challenging.

Liebherr-Hausgeräte previously used the SharePoint locations automatically created by the Microsoft integration of

Dynamics and SharePoint. The options are quite limited in that respect (by Account or by Contact) and resulted in some account folders having over 40,000 items within it.

Due to these specific needs and high number of SharePoint locations, they decided to use SharePoint Structure Creator and a new structure (a new folder for each entity every week) This was already a big change, so they decided to go all the way and cleaned out old files too. In the end they had the perfectly organized structure that they were aiming for, and all the effort paid up.

Outcome

The decision to use Connecting Software's solutions was made quickly after a successful trial period and internal recommendation. [Liebherr-Hausgeräte](#) currently has approximately 900 users on Dynamics 365, with approximately half of them using SharePoint.

The solution has made the company manage permissions in a way that ensures GDPR compatibility and that is a time saver. In fact, it is all automatic which means team members spend no time at all doing this... and no one ever forgets to set the correct permissions!

Another advantage is that access to Dynamics documents stored in SharePoint is now following the logic

chosen by the company, organized by week of the year. This makes it much faster for users to locate the document they need.

Takeaways

Connecting Software's [CB Dynamics 365 to SharePoint Permissions Replicator](#) and [SharePoint Structure Creator](#) have greatly improved Liebherr-Hausgeräte's permission management, allowing employees to easily access the documents they need, while complying with the defined permissions scheme.

The solution's deployment, though challenging, has resulted in a streamlined and automated system that does exactly what the company needs.

We were glad to discover that the Liebherr-Hausgeräte's IT team was conquered by this solution with the combination of the two products. Here is how they put it: *"It was the best solution, does exactly what we needed"*.

Connecting Software

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