Improving Document Security at the Waalitj Foundation

| WAALITJ SUCCESS STORY

"The SharePoint file storage was a point of weakness. We needed to replicate the security permissions from Dynamics into SharePoint to remove this weakness. Now permissions are always on sync."

WILLIAM JULIUS
CRM ADMINISTRATOR

The Waalitj Foundation, formerly known as the Wirrpanda Foundation, has been a cornerstone in strengthening First Nations communities across Australia. Operating in Western Australia, New South Wales, Queensland, and Victoria, the Foundation runs educational, employment, and business initiatives to empower individuals and communities.

Business Challenge

To manage its operations, the Foundation relies on Microsoft Dynamics 365 for CRM and SharePoint for document storage and collaboration. However, they realized document access permissions between the two platforms were not aligned. While Dynamics 365 allowed the Waalitj Foundation to enforce granular access controls for sensitive data, the integration with SharePoint introduced vulnerabilities. As documents were automatically moved from Dynamics to SharePoint, permissions previously applied in Dynamics 365 were not automatically reflected in SharePoint. This created risks of unauthorized access to documents in SharePoint. As William Julius, CRM Administrator at the Waalitj Foundation, pointed out,

"We had locked down areas in Dynamics to specific teams and staff, but the SharePoint file storage was a point of weakness."

Although manual handling of the permissions could be done as an initial step, it was not really an option, as permissions keep changing over time. The permissions issue became a critical pain point as the Foundation wanted to maintain documents limited to the teams they were intended for without jeopardizing collaboration.

Solution

To address these challenges, the Waalitj Foundation implemented Connecting Software's [CB Dynamics 365 to SharePoint Permissions Replicator.](#)

Connecting Software was recommended to the Waalitj Foundation by the West Coast Eagles (WCE) Football Club, with which the Foundation has historical ties. In fact, the Foundation was initially founded by David Wirrpanda, a former WCE player.

When analyzing **CB Dynamics 365 to SharePoint Permissions Replicator**, the Waalitj Foundation discovered that this specific solution was the only one that met the Foundation's key requirement: replicating the security permissions from Dynamics 365 into SharePoint automatically and reliably. William Julius describes the solution as *"an always-on and synchronized Dynamics 365 to SharePoint document*

location permission replicator."

Key features that stood out to the Foundation included:

- **Automation of Permissions Replication:** As permissions are automatically replicated, there is no need to worry about permissions in SharePoint or users having access to what they are not supposed to.
- **Configuration Simplicity:** The new solution's configuration was straightforward and flexible, with automatic user and permission mapping that can be adjusted as needed.
- **Hands-Free Operation:** Once installed, the Foundation knew this solution would operate continuously without requiring user intervention, even if the Foundation decided to update the Dynamics 365 or SharePoint versions.

Deployment

Deploying the Permissions Replicator was a critical step as it involved integrating the solution into the Foundation's existing infrastructure and configuring it to meet its specific needs. Once configured, it should be totally invisible to the 120 users. The permissions would just be correct in SharePoint instantaneously, without the end users having to do anything or even know how it came to be.

The Foundation's team completed the initial deployment by navigating a detailed user guide. While the guide initially felt complex, their determination and expertise ensured the solution was implemented smoothly. Having support available throughout the process further empowered their success and set the stage for long-term impact.

Outcomes and Benefits

Since implementing **CB Dynamics 365 to SharePoint Permissions Replicator**, the Waalitj Foundation has observed significant improvements:

- **Enhanced Security:** Documents stored in SharePoint now adhere to the same exact permissions applied in Dynamics 365, closing that security gap.
- **Time Savings:** The automation of permissions management has eliminated the need to spend time on manual configurations, allowing staff to focus on more strategic tasks.
- **Simplified Operations:** The always-on sync, with the solution always running in the background, makes it very low maintenance.

William Julius shared that he particularly appreciated *"the simple UI and the always-on sync"* functionality, which improves overall efficiency.

Conclusion

The **CB Dynamics 365 to SharePoint Permissions Replicator**, a Microsoft Preferred Solution and market leader since 2015, has proven to be a critical asset for the Waalitj Foundation. By addressing key security challenges without compromising collaboration, it has supported the Foundation in its mission to empower First Nations communities with confidence and hope.

Connecting Software is honored to contribute to the success and growth of the Waalitj Foundation. We deeply appreciate the valuable feedback the Foundation has shared, which helps us continue refining our solutions to better meet their needs. As the Foundation's impact continues to expand, we are proud to know that our solution remains a trusted and integral part of their IT ecosystem.

CHALLENGE

Preventing unauthorized access through Microsoft SharePoint to the sensitive documents of 120 users in a non-profit organization.

APPROACH

Ensuring permissions are automatically replicated from Microsoft Dynamics 365 where they are adequate for organizational needs.

OUTCOME

Sensitive documents in SharePoint now adhere to the exact same permissions policy as Dynamics 365, eliminating risks of unauthorized access and closing this security loophole through a "simple UI and always-on sync".

PRODUCT APPLICATION

CB Dynamics 365 to SharePoint Permissions Replicator

learn more

Connecting Software

THANK YOU

1776 S Jackson St, Suite 602
Denver, CO 80210
United States
Phone: +1 (720)-577-3030

Handelskai 340/5
1020 Vienna,
Austria
Phone: +43 1 3707 200

Poľná 5626
901 01 Malacky
Slovakia
Phone: +421 (0) 34 7725637

Caminho de Santo
António n.º 243,
9020-002 Funchal,
Madeira Island - Portugal
Phone: (+351) 291 945 098

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

Windows Server 2019 Certified

Microsoft Azure Certified

Microsoft Azure Government

salesforce PARTNER SINCE 2019

TÜV SÜD ISO 9001

TÜV SÜD ISO 27001

2021 Connecting Software INNOVATION INDEX Deep Analysis

CONNECTING-SOFTWARE.COM

OFFICE@CONNECTING-SOFTWARE.COM