



## CB Dynamics CRM to SharePoint Permissions Replicator

CRM Documents Are Secured From Unauthorized Access Within SharePoint

**Connecting**  
Software

# Global real estate industry leader keeps customer records safe, thanks to automatic permission replication



**Ivanhoé  
Cambridge**

CDP Capital  
Real Estate Group

## About the Customer

Founded in Quebec in 1953, **Ivanhoé Cambridge** holds interests in almost 500 properties through its subsidiaries and partnerships, focusing mainly on office, retail, residential and logistics real estate.

[www.ivanhoecambridge.com](http://www.ivanhoecambridge.com)

## Benefits and References

*"The SharePoint documents appeared on the newly created teams' SharePoint sites in a matter of minutes. They could begin to work right away. There was no time lost, waiting for the documents to be securely delivered."*

Ivanhoe Cambridge

## Business challenges of the customer

At first, the solution seemed to be rather straightforward, as Microsoft Dynamics CRM offers a standard out-of-the-box integration of SharePoint which enables organizations to link SharePoint documents with CRM records. Also, it enables users to manage SharePoint documents and utilize many of the document management features of SharePoint directly in the Dynamics CRM user interface. However, as the security models of Dynamics CRM and SharePoint differ significantly, this out-of-the box integration does not guarantee the same level of access to records in CRM and SharePoint.

Ultimately, the document management capabilities of SharePoint are integrated into CRM, but the security permissions of CRM are not enforced in SharePoint, which presents a potentially high-risk security issue when dealing with confidential and proprietary information.

## Solution & Result provided by Connecting Software

**CB Dynamics CRM – SharePoint Permissions Replicator** covers the whole Dynamics CRM security model. It ensures the enforcement of proper user rights to SharePoint folders (such as libraries, sites and document sets). Thus it ensures that each document in SharePoint will be accessible only to those users who have access to the respective records in Dynamics CRM. Any modifications to the Dynamics CRM privileges for any record will be automatically applied to the permissions in SharePoint. Whenever a new document is uploaded and stored in SharePoint, it is immediately protected in accordance with the inherited permissions.

With **CB Dynamics CRM – SharePoint Permissions Replicator**, Ivanhoé Cambridge built a solution that seamlessly and automatically meets business and legislative requirements of data privacy and confidentiality. And due to the ultimate stability of the solution, they also managed to mitigate the need for outgoing maintenance.

With their documents safely stored, they can focus on what they do best – investing in real estate.