



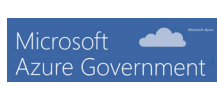
ORBIS AND CONNECTING SOFTWARE PARTNER TO SOLVE A HIDDEN DYNAMICS 365 PROBLEM



PARTNER STORY ORBIS GROUP



Gold DevOps
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Partner
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Activity
IT Consulting



Country
Saarbrücken, Germany



Customers
International corporations and enterprises, especially from the DACH Region (Germany, Austria and Switzerland)



For a full solution of permission replication, we always recommend Connecting Software

Martin Fahrnberger, Managing Partner at ORBIS Austria GmbH

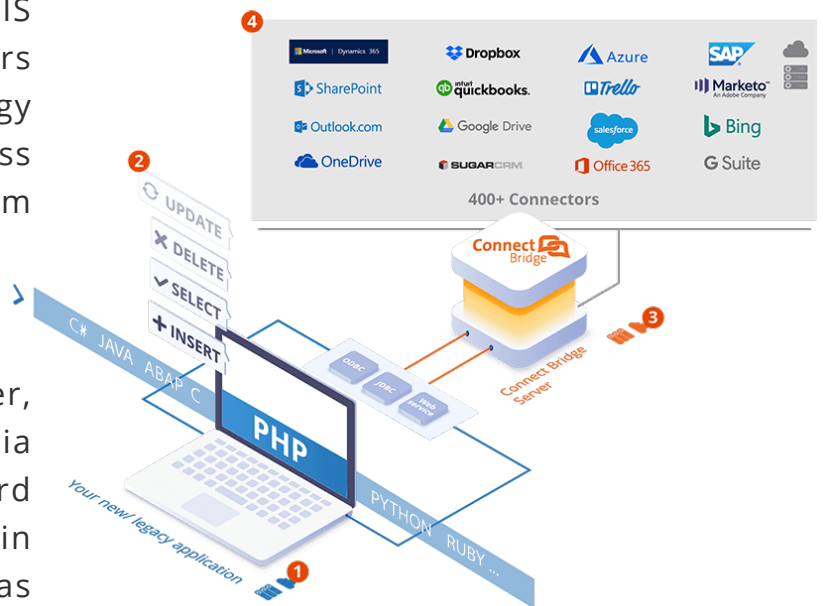
Who is ORBIS?

The [ORBIS Group](#) is an international software and business consulting company, originally established in 1986 in Saarbrücken, Germany. It currently has several offices across Germany, and it is represented across Europe, the United States, and China. With roughly 800 employees, ORBIS advises and supports their customers in issues ranging from their IT strategy and the optimization of their business processes to digitalization, system implementation, and integration.

Starting with Connect Bridge

We sat down with Martin Fahrnberger, Managing Partner at ORBIS Austria GmbH. He told us that he first heard of Connecting Software back in 2010 directly from our CEO, Thomas Berndorfer. Both Martin Fahrnberger

and Thomas Berndorfer were in Vienna, Austria, at the time, and both participated in Microsoft events regularly. On one occasion, Thomas introduced the concept of Connect Bridge - a powerful integration platform that makes integrating different business applications much easier.



"We originally started with Connect Bridge to build some SAP and CRM document integration because the goal was to get data from SAP and CRM into the SharePoint", Martin Fahrnberger explains.

Not having to design an integration solution from the ground up and using Connect Bridge meant saving time and resources and reducing debugging and maintenance efforts.

But that was just the first step. Connecting Software then took the concept of Connect Bridge one step further and started building specific products that solved specific problems, creating a range of out-of-the-box solutions. One of them solved precisely an issue that ORBIS' customers faced.

The Issue with Dynamics Documents in SharePoint

As a leading Dynamics 365 implementation partner, ORBIS commonly faces the need of their customers to integrate their CRM system with SharePoint as the preferred location to store their CRM-related documents. Achieving the integration of both Microsoft products was not complicated, but there was a problem. Customers were surprised that the security roles and permissions were not copied automatically to SharePoint.

"You could configure permissions manually, which is obviously not efficient or practical," Martin Fahrnberger points out.

In a scenario of integration of SharePoint with Dynamics, with a very detailed permission model in Dynamics, users naturally want to have the same permissions on the Dynamics documents stored in SharePoint.

This is exactly what CB Dynamics 365 to SharePoint Permissions Replicator, an out-of-the-box solution, does. This solution is based on the Connect Bridge platform, but the end-users don't even know about this. *"It's basically plug-and-play and solves the issue"* Martin Fahrnberger summarizes.

The solution is also popular with companies that have their Dynamics documents in SharePoint and *"feel the need to have a higher level of compliance,"* Martin Fahrnberger continues.

Indeed, many privacy-related regulations like GDPR/DSGVO or CCPA demand that a company knows who has access to each document that contains any kind of personal data. Suppose the company has already set adequate permissions on the Dynamics side. In that case, Martin

Fahrnberger asks, *“Why would users not want to have the same detailed permission level on the documents that are connected to Dynamics?”*.

In fact, using CB Dynamics 365 to SharePoint Permissions Replicator ensures that permissions in SharePoint perfectly match the ones in Dynamics and that they are automatically kept in sync.

Closing thoughts

So, you might be asking yourself, how ORBIS feels about this tool, having used it in different customers and scenarios over the years. Martin Fahrnberger sees it as a “convenient and practical solution” both for smaller and larger enterprise customers. He additionally highlights the solution’s ease of use.

“It is a SaaS component if you want to, but you have the complexity, if you need it. You can run it in an Azure environment where you can match every little detail as a customer.”

Martin Fahrnberger concludes by saying, *“Microsoft recommends resorting to partners. While we may have been able to build a similar functionality internally, I’m happy to have followed that recommendation and to have put our trust in Connecting Software. Their dedication to customer success and reaction time with any of our requests is outstanding and the quality of their products makes the make-or-buy decision a no-brainer!”*

Connecting Software

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