

# Secure Documents, Global Success: The Systemair Story

| CB DYNAMICS 365 TO  
SHAREPOINT PERMISSIONS  
REPLICATOR

| SHAREPOINT STRUCTURE  
CREATOR



***“This software works brilliantly, and the support is also really super good, I would give both 10 points out of 10!”***

**JÜRGEN HERNADI,  
GROUP IT-DIRECTOR  
OF SYSTEMAIR AB**

**Customer**  
[Systemair AB](#)

**Activity**  
Global leader in ventilation, heating, and cooling solutions

**Country**  
Sweden

**Users**  
1500 +

**Products**  
[CB Dynamics 365 to SharePoint Permissions Replicator](#)

[SharePoint Structure Creator](#)

When a company grows, security gaps that once seemed minor can turn into real headaches unless they are addressed in time.

**Systemair**, a global leader in energy-efficient indoor climate solutions, encountered this very challenge with its use of Microsoft Dynamics CRM (now Dynamics 365) and SharePoint for document management. What started as a reasonable security compromise in 2010 was regularly reevaluated as the company's user base and international presence expanded. In 2021, **Systemair** resolved this potential headache decisively by implementing an out-of-the-box solution called CB Dynamics 365 to SharePoint Permissions Replicator.

Let's learn the ups and downs of this journey to secure documents as the company grew and systems moved from on-premises to the cloud.

### **The Challenge: Staying Ahead of Security Risks**

Back in 2010, when **Systemair** first implemented Microsoft Dynamics CRM version 4 in a single location, the default integration with SharePoint seemed acceptable. Documents were meant to be accessed only through the CRM, so the team accepted that SharePoint permissions weren't

automatically synced with the CRM's detailed security model.

Jürgen Hernadi from **Systemair** recalls:

*"We knew that we had a small security issue there that if you find out a path, you can reach most of the documents because they are not blocked."*

As the company expanded dramatically, eventually reaching more than 1,500 CRM users worldwide, this "small" issue became unacceptable. The SharePoint environment was used exclusively for CRM-related documents (no external sharing or internet exposure), but the lack of proper permission synchronization meant any internal user who guessed or discovered a direct path to a folder could potentially access sensitive files they shouldn't see.

The team seriously considered custom development through a Microsoft partner, but they saw how the complexity could be a problem:

*"You really need to think twice before starting something like this on your own because it is highly complicated!"*, Jürgen

Hernadi remarked. In fact, ongoing synchronization of permissions is necessary, and you need to accommodate all the scenarios:

onboarding, offboarding, changing roles, and many more!

## Discovery and Proof of Concept: A Pleasant Surprise

Jürgen Hernadi found Connecting Software while searching online for solutions. **Systemair** then decided to run a proof-of-concept, and the results were impressive right away.

Jürgen Hernadi shares:

*“It was amazing to see how good and how smart this was working out of the box without any individual programming!”*

From day one, the support team provided excellent guidance, helping **Systemair** move from testing to full implementation. The final solution involved two complementary tools from Connecting Software:

- **CB Dynamics 365 to SharePoint Permissions Replicator** — the core component that automatically mirrors permissions from Dynamics CRM to SharePoint, ensuring users have access to the exact same documents in both systems—no more, no less.
- **SharePoint Structure Creator** — used to organize documents efficiently in a configurable folder structure and avoid hitting

SharePoint’s unique permissions limit.

Jürgen Hernadi explains the combined solution simply:

*“For me, it’s only one solution, at the end, to synchronize the permissions from CRM to SharePoint.”*

The business goal was crystal clear:

*“If a user can reach a document in the CRM, the user shall reach it in SharePoint and vice versa.”*

Even more important is what the user cannot access:

*“In fact, if a user cannot reach a record in the CRM, the user shall not be able to open the related SharePoint folder.”*

## The Big Migration: From On-Premises to Cloud (and Millions of Folders)

After years of successful on-premises use, **Systemair** undertook a major “big bang” migration to the cloud in January 2025, which involved **moving both Dynamics CRM and SharePoint to the cloud simultaneously**.

The volume of files to be moved was enormous, which meant the work in terms of permissions was also enormous: more than **4 million folders** had to be processed during the initial permission replication

and structure setup. This took weeks to complete due to Microsoft API limitations, but

*“looking at the Connecting Software’s side, it was just smooth”,* Jürgen Hernadi adds.

He also feels it was crucial that the Connecting Software team would always step up with proactive support:

*“If we face an issue, we can contact you, and usually in one or two hours, we get a response and, more, your support is really working very proactively.”*

### **The Results: Reliable Security That Just Works**

Today, the solution runs quietly and flawlessly in the background, protecting sensitive documents across a global workforce without manual intervention or workflow disruptions.

When asked to rate the products and support on a scale of 0 to 10, Jürgen Hernadi didn’t hesitate:

*“This software works brilliantly, and the support is also really super good, I would give both 10 points out of 10!”*

He adds that the team has always received help, even when troubleshooting issues that in the end

were not caused by the software.

### **Key Takeaways for IT Leaders Managing Dynamics 365 CE + SharePoint**

1. **Don’t assume default Microsoft integration is secure enough.**  
Permissions are not aligned automatically, and that can become a serious risk.
2. **Consider off-the-shelf tools before custom development**  
— Systemair avoided a highly complex (and expensive) in-house or partner-built solution by finding one that “just worked” out of the box.
3. **Plan for the future** — With Microsoft updates and organizational changes coming your way, strong vendor support makes all the difference.
4. **Proactive beats reactive** — Address permission gaps before a breach or audit forces your hand.

**Systemair’s** story is a classic example of forward-thinking security: they closed the gap early, scaled globally, and moved to the cloud without drama, and gained peace of mind.

## About Systemair

Systemair is a leading ventilation Group that helps improve the indoor climate through energy-efficient products and solutions. The Systemair Group conducts business in 51 countries across Europe, North America, the Middle East, Asia, Australia, and Africa. Systemair has reported an operating profit since its founding in 1974, and currently has about 6,700 employees.

## About Connecting Software

Connecting Software has been providing software solutions to synchronize data and connect enterprise systems for over two decades. It serves over 1000 customers globally, particularly in highly regulated sectors such as finance, public service, and defense.

Connecting Software's solutions work automatically in the background to increase productivity, improve security, and ensure compliance. They easily connect with popular business applications like Microsoft Dynamics, O365/M365, SharePoint, and Salesforce.

They also incorporate proven, cutting-edge technologies such as blockchain for data integrity and authenticity, and data diodes for unidirectional secure data transfer in

sensitive environments. This strategic application of advanced technologies ensures effectiveness and reliability for clients' critical operations.

### PRODUCT APPLICATION



#### **CB Dynamics 365 to SharePoint Permissions Replicator**

**CB D365 to SharePoint Permissions Replicator** addresses a critical gap in the native Dynamics 365 and SharePoint integration. It automatically synchronizes document access rights across both platforms, ensuring consistent, secure, and compliant document management.

[Lean More](#)



#### **SharePoint Structure Creator**

**SharePoint Structure Creator** ensures SharePoint documents are neatly organized according to rules you define, boosting team productivity and preventing your organization from reaching SharePoint's unique permission limits as it grows.

[Lean More](#)

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