

TAKRAF Group Streamlines the Management of Transmittals Across Microsoft 365 and Autodesk Construction Cloud

"A 60% decrease in overhead and time"

"Reduced the labor required to control content by 60%"



About TAKRAF Group

Founded in 1948, with origins going back to 1725, TAKRAF Group today includes the established and well-known brands TAKRAF and DELKOR and oversees global operations from its headquarters in Germany. TAKRAF Group is recognized as a world-leading technology provider in high-capacity run-of-mine and bulk material handling, providing innovative technological solutions in mining and associated industries.

With a specific focus on supporting clients with solutions designed to save energy, reduce environmental impact, and meet or exceed operational requirements, the company provides equipment, systems and services that satisfy clients' mining, comminution, material handling, liquid/solid separation, and beneficiation requirements. TAKRAF Group's portfolio ranges from overburden removal to raw material extraction, comminution, conveying, loading/unloading, processing, homogenizing, blending, storage, and final loading for onward shipment.



USE CASE



TAKRAF Group is a global leading specialist that provides innovative technological solutions for mining and bulk material handling. Core to their business is the design and delivery of highly specialized equipment. Design is performed in-house and external vendors provide most of the fabrication and manufacturing of these specialized components. The timely delivery and accuracy of these design files is essential.

Design documents are created and then stored in Autodesk Construction Cloud®, a portfolio of software and services that combines advanced technology, a builders network and predictive insights for construction teams. These drawings are the contractual basis of the deliverables they have commissioned on a specific project and are sent to TAKRAF Group's vendors (fabricators). All other project assets, such as contracts and spreadsheets, are created and stored within SharePoint.

Design documents must be copied from Autodesk Construction Cloud over to the correct location within SharePoint. Since TAKRAF Group stores content and information in both Microsoft 365 and Autodesk Construction Cloud, they needed to ensure the latest file versions were shown in their core document management platforms.

CUSTOMER CHALLENGE



How to centrally manage Autodesk Construction Cloud and Microsoft 365 and transmit content from both systems.

TAKRAF Group requires that hundreds of thousands of documents be reviewed and transmitted from SharePoint each year. SharePoint is the place of record for both Microsoft Office, PDF assets and content generated by their design group operating in Autodesk Construction Cloud.

Setting up and governing access to both SharePoint and Autodesk Construction Cloud was very time consuming, requiring a document controller to manually download information from Autodesk Construction Cloud and upload it to SharePoint. There was also no integration or data relationship between the two platforms, which siloed critical information.

Managing and reporting on transmitted content was also a manual process via Excel, taking up the majority of their document controllers' time. The combination of decoupled information and brute force effort resulted in significant overhead for its employees, and exposed TAKRAF Group to greater potential rework and contractual disputes.

To solve the enormous challenge around transmittals and document control, TAKRAF Group performed an in-depth product analysis and piloted a few solutions, including ProjectReady. Now in its 4th year at TAKRAF Group, ProjectReady is the standard for transmittals and document control for TAKRAF Group worldwide.

SOLUTION



ProjectReady's "Build Your Project" feature met TAKRAF Group's document control and transmittal requirements, automatically setting up and connecting a dedicated Microsoft 365 group – SharePoint, Teams and Group mailbox – and a project in Autodesk Construction Cloud. All the project metadata is identical in both Autodesk Construction Cloud and Microsoft 365, with files from one platform synced to the other in real time. An integrated data environment was established and data warehouse tracks and audits the movement and status of content.

Security and permissions are managed centrally via ProjectReady's roles matrix. Adding or removing users from the team is managed in ProjectReady. Administrators can also update permissions and secure access in both Microsoft 365 and Autodesk Construction Cloud, using ProjectReady's Enterprise Team Management feature manages security at scale. Thousands of users can have their permissions updated across Autodesk Construction Cloud and Microsoft 365, across their entire portfolio.

With both platforms connected, project data in Autodesk Construction Cloud is automatically synced with SharePoint, eliminating the burdensome overhead of manually downloading and uploading construction documents between both systems.

Dedicated libraries in SharePoint are automatically created, with the correct permissions programmatically set based on the vendor. By using DCNext, ProjectReady's document control suite, content is registered, reviewed, and transmitted.

Vendors submit information to their dedicated, secure libraries via DCNext's "Register Content" workflow, which helps enforce governance and proper reporting of the event for a fully traceable transaction. Project managers are notified of new content being submitted and can choose to acknowledge them or begin the review process. DCNext's workflows can be "daisy-chained", meaning registered content can automatically be loaded into DCNext's content cart with all the original information and metadata preloaded. Additional content can then be added and once done, the process can continue via the "Content Approval" workflow and final, authoritative documents transmitted.

With every transaction captured in the ProjectReady Data Warehouse, a rich and powerful reporting and search is at the ready to manage, understand, and audit all the project's content.

ProjectReady solved the customers' challenge by bringing SharePoint and the Autodesk Construction Cloud together in the single context of the project, automating and simplifying the management of both platforms. Establishing an integrated data environment, ProjectReady eliminates data silos providing real time information and status about content in flight -- essential to reduce rework and mitigate contractual disputes.

ProjectReady's comprehensive approach to managing the projects ecosystem drives the unique ability to address TAKRAF Group's challenges by:

Simplifying and unifying the transmittal process with ProjectReady's DCNext document control suite

Automating the traceability transmitted content in flight

Automating the setup of 100 projects a year in both Microsoft 365 and ACC

Managing security at scale across Microsoft 365 and Autodesk Construction Cloud, centrally and simply

Providing rich reporting and search

Automatically synchronizing content in both systems

CUSTOMER OUTCOME ACHIEVED



By bringing SharePoint and the Autodesk Construction Cloud together in the single context of the project, ProjectReady was able to overcome the inherent and monumental challenges of managing the transmittal of thousands of documents originating in both Autodesk Construction Cloud and Microsoft 365. TAKRAF Group can now efficiently transmit and trace transmittals with content from both ACC and Microsoft 365 – across 100 active projects.

Automating the setup of projects in Autodesk Construction Cloud and Microsoft 365 has reduced the initial project setup from taking several hours for each system, to both now being set up in around 10 minutes. Additionally, project specific configurations can now be applied within another 15-30 minutes, depending on their complexity, which previously could have taken 2-8 hours to set up and configure. TAKRAF Group was able to streamline the project configuration process, reducing the number of systems they need to configure on a project from five to two – a **60% decrease in overhead and time**.

With ProjectReady's DCNext, simple to use wizards helped TAKRAF Group solve its challenges around the transmittal process, **reduce the labor required to control content by 60%, and send an average of 162 document control packages totaling 10,933 documents a week in 2024**, rich reporting and traceability means TAKRAF Group has control of their contractual deliverables to their vendors- greatly reducing rework, risk, and disputes.