



CASE STUDY

**TRANSMITTAL MANAGEMENT SOLUTION
FOR A LARGE MIDDLE EASTERN**



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ABOUT CLIENT

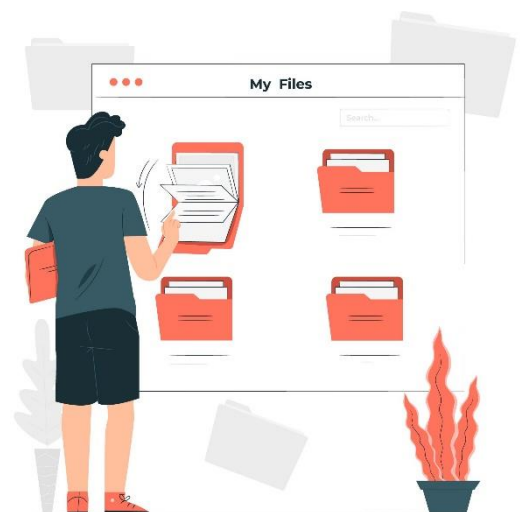
The client is a well-known Emirati firm that has influenced the evolution of the energy sector in Abu Dhabi. They offer proficient solutions to the Aviation, Chemical, Petrochemicals, Oil, Gas, Renewables, Water, Power, and Manufacturing sectors and consider customer satisfaction paramount.

BUSINESS REQUIREMENT

- The client needed a transmittal solution to transfer assets drawings, specifications, calculations, and other information, usually for review, comment, or approval purposes. Transmittal comprises a cover sheet that gives information about the files being shared.
- For the client, the transmittal would be an official business record, forming the basis for contractual decisions and results, and even determining liability in specific situations.
- The client could face issues if there was no way to control and audit the process of transmittal exchanges. Potential challenges include escalations and projects stalling, as confusion would mount over who received one version of a document, and what was approved, and matters could get more complex with the involvement of third-party stakeholders.

CCS SOLUTION

- CCS Engineers built a transmittal solution on top of Microsoft 365 (SharePoint Online) as an extension of the document management system.
- The transmittal management solution made it possible for users to set alerts, get notifications and send transmittals via email or shared folders.
- The solution allowed users to send multiple documents in a single transmittal.
- The solution provided options to help users preview, recall, resubmit transmittals.
- Users could securely access all versions of the transmittal documents based on their roles.



BUSINESS BENEFITS

- The transmittal solution helped the client manage the flow of transmittal correspondence in an intuitive and effortless way.
 - Helped increase productivity with rapid transmittal processing and accessibility from anywhere.
 - As the transmittal solution was integrated with Dynamics 365 Project Operations, the client could easily navigate to documents and work on transmittals from Microsoft Dynamics.
 - Enhanced collaboration among the client's internal and external stakeholders.
 - Made simple, secure, and standardized generation and transfer of transmittals possible.
 - Helped users track the transmittals through transmittal logs.
 - Allowed the client to manage and monitor multiple transmittals.
 - By means of an MDR/MDL, the transmittal solution provides transparency when communicating with external stakeholders/vendors/etc. Reduced risks with transparent processes, reporting and auditing.
 - Seamless integration across M365 components – Teams, SharePoint, Outlook – increased their efficiency.
 - Large files/docs can be sent across to external parties without M365 subscription in shared folders.
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