Solar Energy

Modernization & Migration on Microsoft 365

This Bamboo customer, the Corporation, is a leading, national solar energy firm with an established reputation for integrity and reliability across its three distinct and complementary businesses:

> **The Corporation is** home to the premiere environmental commodity portfolio in the country, trading SRECs, RECs and carbon credits. Corporation Trading manages a proprietary fund that is active in solar and wind energy credits, carbon and soon electricity, as well as over 12,000 SREC customer accounts.

> **Corporation Fund & Asset Management (FAM)** deploys tax equity into the solar industry for our institutional clients. In 2018, FAM created a joint venture to acquire, develop, build, and own utility and commercial solar assets throughout the United States.

> **Corporation Customer Solutions,** another joint venture, provides renewable energy solutions to commercial, industrial, institutional, and municipal customers.

To date, the Corporation's three businesses have developed and/or financed over 1 GW of solar projects valued at more than $1 billion for Fortune 100 companies, municipalities, counties, utilities, universities and schools.

The Challenge

The Corporation was fast growing and adapting their technological solutions in any way they could to meet their customers' needs. The primary concern for the Corporation was to obtain control and prescribe governance on company document management. The goal was to centralize and secure the

communications with their clients through documents in a system that could be easily searchable and extendable.

Previously at the Corporation, files were stored in local file shares and project management/organization of assets was handled through folder directory structures. Any assets that required sharing or collaborating with external users were stored in Citrix FileShare and were separate from the documents and context of the Corporation's internally stored assets. This experience limited the employees from knowing where to find documents of interest and did not allow for tagging or meta-data assignment to aid in the searchability or management of company knowledge base materials.

The Corporation's project was originally scoped to solve a document management issue and to assist with the migration from several document repositories into a new, organized and secured Microsoft 365 based solution. The project plan for developing an intuitive and consolidated solution included:

- Build a Corporate Portal that will create consolidated, intuitive and effective organization of all electronic company documents using Microsoft SharePoint Online in Office 365 (SPO)
- Migrate files and documents (1.7 Terabytes) from the current file repositories to SPO
- Architect the Enterprise level knowledge sharing and collaboration platform that enables the Corporation to perform its internal business functions and operations as optimally as possible using the latest tools and features of Microsoft 365
- Ensure the solution accomplishes the following:

  o De-duplication of documents in storage

  o Creates intuitive document storage strategies for minimizing confusion

  o Provides governance on proper system usage and interaction

  o Simplifies the administration of security and monitoring

  o Delivers peace of mind for storage integrity and recoverability

  o Enables external sharing with external parties (Files/Folders)

  o Creates reporting capabilities for auditing folder/file sharing and user activity

  o Allows for offline access and synchronization of files

  o Implements document versioning and co-authoring capabilities

  o Creates a unified and enterprise wide search capability

Strategy

Bamboo Solutions typically begins all relationships with new clients with a Discovery Phase to build a working relationship with stakeholders and to refine requirements into an actionable strategy and architecture. The Bamboo team met with the Corporation's stakeholders in their downtown Washington, DC offices to understand current pain points and issues regarding technology-based solutions. This understanding allowed the Bamboo team to draft an architecture for the new SharePoint Online tenant,

which provided not only global site and content structure recommendations, but also recommendations for the departmental level with customized functionality based on their individual use cases.

The CIO provided the vision of creating a more collaborative and organized solution to working through the business processes and document storage of ongoing the Corporation's day to day operations.

The Bamboo team created a plan with the following milestones/deliverables:

- Construction and deployment of the corporate portal
- Build portal site collections and hubs
- Setup & design portal home page content
- Corporate branding, look and feel
- Creation of department and business unit site collections
- Configure security and permissions

- Create file repositories based on site mappings
- Migration of files from current repositories to portal
- Go-Live support and training
- Expansion of corporate portal to the enterprise level knowledge sharing and collaboration platform

Document Migration

The project started with an inventory of current assets to be migrated. This inventory identified that the majority of the organization's documents resided on two internal file shares totaling just under 1.8 Terabytes of data. These file shares had been in place for many years and presented a great opportunity for analysis and ultimately the archiving of many outdated or irrelevant assets. Bamboo met with each department in the organization to assist in the identification of all document assets that were under their control and to aid in the clean up and archival of any assets we could remove from the migration plan. This also gave Bamboo the insights needed for understanding how and who would need access to these documents when we migrated them into the new SharePoint Online tenant.

Intranet Architecture & Portal Build

Bamboo proposed a flattened architecture, as is best practice in SharePoint Online, to include the use of hub sites and associated sites. The hub site architecture allowed Bamboo to create a primary intranet hub with associated sites for each department's private collaborative space. These department sites were Microsoft Teams connected, delivering on improving the collaborative and communicative capabilities that each department had as a business unit. There were certain assets during the lifecycle of a typical Corporation project that needed to be shared with external users. Each business unit also maintained a public library which they could share with external users at the item level.

SharePoint Hub Architecture
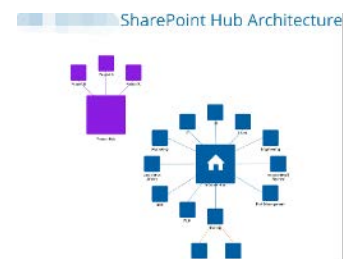
Monitoring & Auditing

Given external users and the need for collaboration with outside resources, there was an immediate need for monitoring and auditing access. By leveraging the Microsoft 365 Security & Compliance Centers, Bamboo was able to train users and recommend best

practices around the use of this capability and the implementation of its features into the Information Technology team's operational responsibilities. The Corporation was able to reach the desired level of oversight by using the Security and Compliance Centers in combination with the ShareGate Desktop solution for reporting on external user content sharing. A follow-on project has been proposed to implement Sensitivity labels across the tenant for classifying and protecting the organization's data, while making sure that user productivity and their ability to collaborate isn't hindered.

Other Areas of Interest

Data Backup & Recovery

Backing up content for recovery was a primary concern as the organization already had experiences with loss of content. Bamboo provided consulting and training on the capabilities of SharePoint Online data restore policies and processes to ease the concerns of IT leaders and data stewards.

File Sync

The typical user at the Corporation prefers working with documents in the standard Windows File Explorer view of repositories. Babmoo was able to provide functionality through the OneDrive Sync client and a combination of metadata default assignment to both provide a strong search experience with metadata and a folder structure organization model for those users that sync'd any SharePoint document libraries.

Results

Bamboo Solutions was able to successfully deliver a consolidated, centralized and modernized collaboration solution to the Corporation and their users that enables the organization to continue optimizing and improving their business as they continue to experience strong market growth. The migration project at the Corporation provided a new, modern portal for the company to improve their overall knowledge management and sharing, creating higher levels of efficient communication, understanding, and overall findability of business intellectual property. By incorporating the entire Microsoft 365 Suite of applications into their solutions and future proofing their overall IT portfolio, the Corporation can confidently move into the next chapter of their business pursuits with current and industry leading tools at their disposal.

This project was executed during the period just before COVID-19 and delivered a perfectly timed solution as the world prepared to deal with an all-remote workforce. As we move into future times of workforce uncertainty and remote teams, Bamboo has the expertise and tools to deliver customized solutions with the exact capabilities needed for today's workforce.

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When questions arise or help is needed, we are there with a full range of services and support to ensure our clients are up and running as soon as possible.

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