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Case Study

Document Management Solution

Centralizing Corporate Policies and Procedures

A Bamboo customer, the Corporation, delivers safe and innovative solutions for a cleaner energy future. They are driving energy transformation by delivering the power of clean alternatives with natural gas, renewable natural gas, propane, hydrogen, and battery electric to a wide range of applications.

Contents

> This implementation provided the Corporation with a centralized and consolidated platform to store Policies and Procedures. It also enables collaboration on these policies with the capabilities that are both industry leading and effective to their processes.

01

> **Global Communication and Organizational Optimization**

02

The Challenge

Centralizing Corporate Policies and Procedures

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Company Mission
Putting data to work to enable autonomous, connected ecosystems that boost efficiency, productivity and quality for our customers.

At this Corporation, SharePoint Online has been utilized across the organization and legal entities for document management, collaboration, and workflow usage. The Corporation has described an interest in leveraging their Office 365 features and apps to assist with centralizing the corporate policies and procedures into a consolidated space that can be accessed by internal employees and external parties as delegated.

Bamboo Services reviewed the current needs and requirements with the Corporation's stakeholders during a Discovery Phase and as a result have summarized the plan to provide an intuitive and consolidated solution as follows:

Build a Corporate Intranet that will create a unified, intuitive, and effective organization and consolidation of all electronic Corporate Policy documents using Microsoft SharePoint Online (SPO).

Design and architect the enterprise level knowledge sharing and collaboration platform that enables corporate users to submit or create new Corporate Policy assets, allow metadata to be tagged and filtered, then routed through the channels of approval. The entire solution will consist of 4 distinct parts in its architecture:

- Published Document Management System (PDMS)
- Corporate Intranet
- Source Docs
- External Published Document Management System

A workflow will be developed to route documents for approval from the Source Docs # 1 location to the PDMS.

The Microsoft Power Platform will be used to allow users to uploaded files directly to the Source Docs location.

Strategy

A centralized and consolidated platform to store Policies and Procedures

03

Bamboo Solutions focused on executing steps identified during the Discovery phase. Bamboo has adopted an iterative approach that delivers solutions incrementally. In each sprint, Bamboo Solutions performs life-cycle development tasks such analysis, configuration and migration of files and data to ensure consistent delivery of functionality. Regular client feedback through weekly touch points ensures project transparency and focus remain a priority.

This implementation provided the Corporation with a centralized and consolidated platform to store Policies and Procedures. It also enables collaboration on these policies with the capabilities that are both industry leading and effective to their processes.

The architecture proposed for the intranet follows Microsoft's direction in flattening site hierarchies and architectures. Leveraging the new Hub site capability allows sites to move around the organization as the organizational structure changes over time. The new hub architecture will allow new capabilities around consolidating data from hub connected sites and delivering a better overall experience.

The Corporate Intranet is now the medium for which the Policies & Procedures are displayed, based on the corresponding departments homepage. Each legal entity of the Corporation will be represented by a 'spoke' off the main 'HUB' of the Intranet. Each spoke will have an area to display policies and procedures.

The Published DMS is used to house and display the final non-editable version of the corporate policy and procedure.

It has the following features:

  · Uniform look and feel throughout the site, adopting corporate theming where applicable.
  · The site is limited in permissions, only allowing admins to make changes to the site.
  · The repository will contain files that have been converted to a PDF format from Source Docs.

Documents are fed here based on metadata and an approval workflow that routes documents to the appropriate users based on that metadata.

The Source Docs repository is the location where users create, curate and submit Policies and Procedures for approval based on the review/approval requirements identified during the Discovery phase. Documents curated here are editable by users/owners/authors for the duration of the document curation process. Once determined it is ready for approval, the document is updated with appropriate metadata and routed, using PowerAutomate, to its official channel for review.

The architecture for the Source Docs location is composed of Document Libraries that correlate to each business entity within the Corporation's organization. The diagram below outlines how this approach was implemented.

Permissions for this repository are managed by each business entity. All users within the company have access to create, curate and submit artifacts for review – based on the company/entity they are associated with.

Figure 2. Global Metadata Publishing

The Results

Delivering a simplified and intuitive Document Management Solution for a global audience

The published Document Management System (PDMS) – Internal is the final resting place for the curated and approved Policy & Procedures in a non-editable environment to be viewed and accessed by internal users. The permissions and access to the site is managed by a key group of administrators to be defined by the Corporation.

The key features of this space are:

- Internal use only, permissions locked down based on legal entity requirements
- Single library per legal entity
- File tagging and metadata per file and library
- Non-editable final PDF asset

The Published Document Management System – External is the final resting place for the curated and approved Policy & Procedures in a non-editable format/environment to be viewed and accessed by external users. The key features of this environment mimic the Published Document Management System – Internal with the exception of the external access.

Account access is provisioned by granting an unlicensed guest account in Azure AD that will be added to an external users AD group. The "everyone claims" will be disabled which will reduce risk of accidental sharing.

The external user interface is similar to the internal Published Document Management System. The landing page is a collection of policies and procedures organized in a fashion discovered during the discovery and creation process. The site collection is a collection of Document Libraries that hold content,

tagged with metadata in replication of the Published Document Management System.

The workflow, built using Power Automate and is the main channel to move Policies and Procedures from the Source Docs to the Published Document Management System – Internal and External.

A form and process has been provided to users on the Source Doc location with the ability to upload an existing file for curation and approval. This form is simple and effective in letting users submit the document, tag with appropriate metadata and allow the partially predefined workflow process to initiate. Once the document is initiated, reviewed and approved the workflow will route it to the Published Document Management System in the appropriate legal entity library based on the metadata.

If the document is determined to be external, the file is tagged appropriately and routed through the approval workflow, once approved it is routed to the external version of the Published Document management system.

Let's Work Together

05

The Bamboo Family is a Tight-knit Group of Technology Specialists, Consultants, & Industry Strategists

The Bamboo Way is our promise to build solutions and to provide services that will be there for your journey. Since we first set out, we've provided a broad range of enhanced capabilities and solutions that have helped thousands of organizations get the most out of SharePoint. Scrappy and tenacious, we value transparency and respect confidentiality. We optimize products based on feedback, making and saving money for our customers.

RELIABLE · FLEXIBLE · SCALABLE

THE BAMBOO WAY

READY WHEN YOU ARE

Why Bamboo?

Your One-Stop Solution Shop
With over fifty tried and tested solutions available coupled with our award winning services, we enable our clients to tailor solutions to their needs, knowing they are working with a single company with a rock solid reputation.

Hands-On Support
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.

Gold Standard
A Microsoft® Partner holding Gold certification in two competencies, we enjoy a close working relationship with Microsoft and other key partners.

Reputation
Our valued customer base includes some of the world's best known brands and we are a trusted technology provider for many agencies of the U.S. Federal Government.

Customer Driven
We are committed to delivering world-class products and services that maximize our client's ROI. That's why our clients are our priority and our initiatives are driven by their feedback.

Our Clients

CUSHMAN & WAKEFIELD · Discovery CHANNEL · FISH. FISH & RICHARDSON · BPA Solutions · HAWAII COMMUNITY FOUNDATION · Hunt REFINING COMPANY · NATIONAL ASSOCIATION OF Manufacturers · JOY GLOBAL · WILEY

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