Sustainability Data Capture Tool

Supply Chain Sustainability Reporting System

Independent Learning – Viewer User Guide

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Welcome

The purpose of this Viewer User Guide is to demonstrate how you, as a Viewer, can utilise the Sustainability Data Capture Tool (SDCT) to review supply chain sustainability data pertaining to specific SSEN Transmission projects.

This presentation consists of several sections which are designed to facilitate independent learning at your own pace.

The completion of this training is estimated to require 35 minutes.

Please note the SSEN Transmission Sustainability team is able to provide additional training support if required. We understand learning is different for everyone.
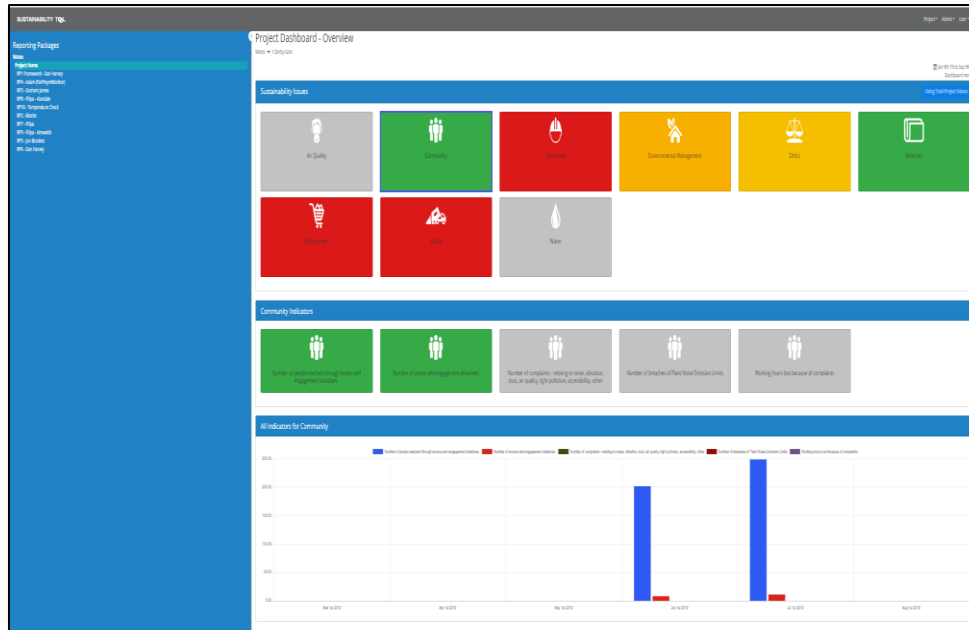
Training Contents

What is the Sustainability Data Capture Tool?

Screenshot of a Project Dashboard within the SDCT

The SDCT is an online, cloud-based, sustainability performance reporting system that is designed to manage the sustainability performance of supply chains.

It collects, reports and analyses environmental and social sustainability performance using smart dashboards at project and directorate levels.

Ultimately, it provides a robust and easy-to-use performance measurement and management framework.

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# Purpose of the Sustainability Data Capture Tool

As a business at the forefront of the transition to a low-carbon economy, we have set achieving **Leadership in Sustainability** in RIIO-T2 and beyond. This means being a trusted partner of customers and communities, realising long term benefit for society, economy and the environment.

The SDCT underpins how we achieve Leadership in Sustainability. It is required for two key reasons:

1. Enhanced supply chain reporting is featured within the [RIIO-T2 Sustainability Action Plan](#), specifically the Sustainable Procurement Supply Chain Action Plan

2. Ofgem has set minimum requirements for supply chain reporting on SSEN Transmission projects' sustainability performance during the RIIO-T2 price control period, the details of which can be found [here](#)

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What are the Project Requirements?
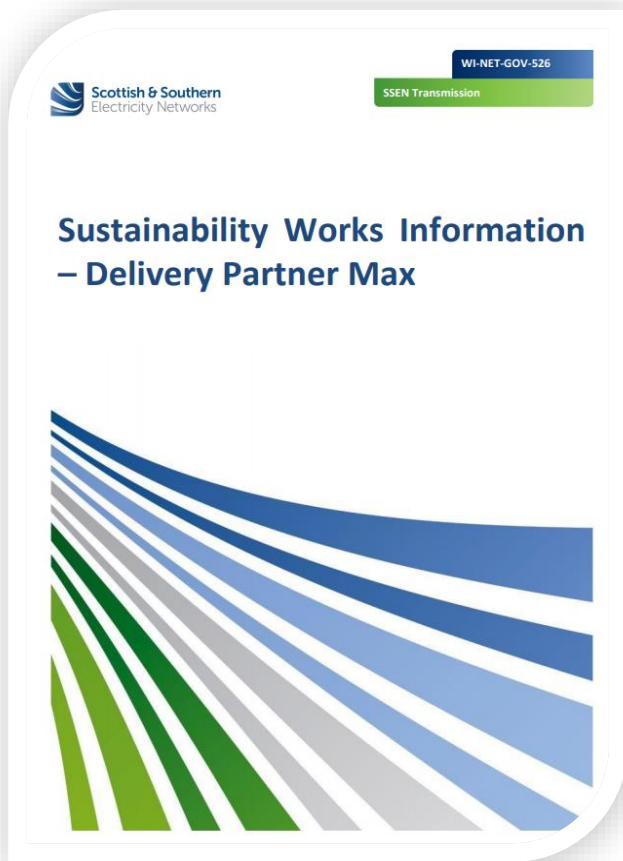
All newly awarded contractors in the RIIO-T2 price control period are required to report on specific projects over a value of £500,000 *(non-load projects under a value of £500,000 delivered by Operations are not presently included).*

The supply chain sustainability reporting requirements are specified within Section 4 of the Sustainability Works Information documents – Delivery Partner Light and Max (WI-NET-GOV-526).

WI-NET-GOV-526

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Sustainability Works Information – Delivery Partner Max

What are the Benefits?

There are several benefits to utilising the SDCT which range from:

- Ability to demonstrate innovation and best practice in sustainability;

- Automated data collection by supply chain partners reduces internal resource requirements to collect data manually;

- Providing increased efficiency in data collection, analysis and output through a standardised system;

- Improved data analysis tools will improve internal and regulatory reporting which will identify further areas of improvement; and

- Increase in visibility and understanding of supply chain sustainability impacts

Reporting Packages Overview

Annual — Contractor Survey

Annual — Social Value Reporting

Monthly — Environmental Reporting

The SDCT requires suppliers to submit both annual and monthly data which the above image illustrates.

The following slides elaborate on what suppliers are expected to provide and adhere to.

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Annual Contractor Survey

This is a concise survey, consisting of nine questions, which must be answered and submitted annually. The data collected will provide company-level information regarding sustainability commitments, most specifically around commitments to Science Based Targets. **This only needs to be submitted once per year per company, not for each project.**

Partial screenshot of the annual contractor survey reporting requirements

Environmental Reporting Package

This covers project-level supply chain sustainability reporting requirements around local environmental value, site carbon emissions and water use. Most of these are required monthly for each project; however, a few are only required annually. The SDCT distinguishes this when suppliers are due to report.

Partial screenshot of electricity reporting requirements

Social Value Reporting Package

This covers project-level data reporting requirements around community benefit, local economic value and workforce welfare. These are annual reporting requirements required for each project. The SDCT will establish the submission date.

Partial screenshot of communities reporting requirements

Partial screenshot of careers reporting requirements

2022 Reporting Submission Deadlines

The reporting submission deadlines are standardised for the 10th of each month.

The SDCT will issue a reminder to suppliers seven days prior to the reporting submission date and will display whether suppliers have reported according to a red, amber or green rating. The image below depicts an example of the Shetland HVCD Link project and overdue reporting required from Bam Nuttall and Hitachi Energy.

Reporting compliance is captured within Module 2.

Users' Group Overview

Four unique user groups have been created for the SDCT to showcase the range of diverse responsibilities. The next slides expand on each profile briefly.

Please visit Appendix A and review the User Group RACI Matrix for further information on each user group.

Viewer	Admin	System Admin	Reporter
Internal Employees	**Internal Employees**	**Internal Employees**	**External Contractors**
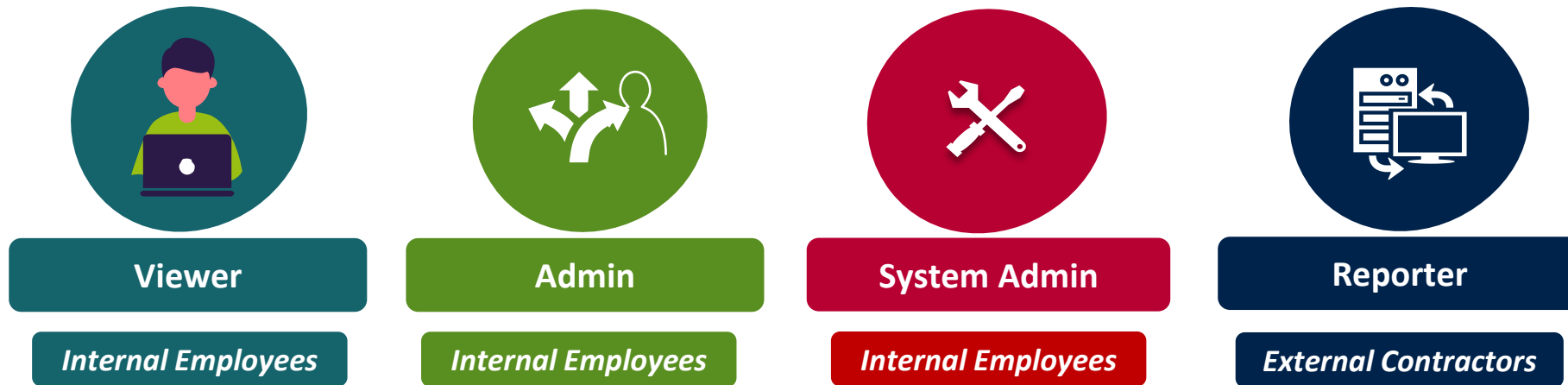
Viewer Profile

Viewer

Internal Employees (Mandatory: Project Managers)

Who is a Viewer within SSEN Transmission?
This is typically the Project Manager as this is mandatory; however, any SSEN Transmission employee with a vested interested in a specific project may gain access pending the request is valid. Please speak to the relevant Admin contact (Project Coordinator)

What is the role of a Viewer?
To view sustainability data pertaining to specific SSEN Transmission projects for which they have access to.

What is the responsibility of a Viewer?
In a scenario whereby the Reporter (the Contractor) has not reported according to the deadline, the Admin will inform the Viewer (the Project Manger). It is the Project Manager's responsibility to liaise to rectify this.

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Admin Profile

Admin

Internal Employees (Mandatory: Project Coordinators or Project Managers)

Who is an Admin within SSEN Transmission?
This is the Project Co-Ordinator or Project Manager within Network Renewals and Connections.

What is the role of a Admin?
To successfully set-up SSEN Transmission projects within the SDCT which ultimately supports sustainability data gathering for the business and Ofgem reporting.

What is the responsibility of a Admin?
To ensure SSEN Transmission projects are set-up in the system and to assign the relevant Contractor(s) to the project. It is also critical the Admin reviews the SDCT on a monthly basis to inform the Project Manager of any reporting deadlines which have been missed.

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System Admin Profile

System Admin

Internal Employees (Mandatory: SSEN Transmission Sustainability)

Who is a System Admin within SSEN Transmission?
This role is managed within the Sustainability team, presently by the Sustainability Analyst and Carbon Reduction Manager.

What is the role of a System Admin?
To review sustainability related data and collate for reporting requirements internally and to Ofgem.

What is the responsibility of a System Admin?
To ensure the system is functional and operational for monthly and annual reporting.

Reporter Profile

Viewer

*Internal Employees
(Mandatory:
Project Managers)*

Who is a Reporter within SSEN Transmission?
This is an external supplier who is operating on SSEN Transmission projects. Importantly, there will likely be multiple reporters from an organisation to complete the relevant sustainability reporting criteria.

What is the role of a Reporter?
The Reporter is responsible for data entry and the submission of monthly and annual sustainability reporting as per the Sustainability Works Information. There is not an expectation to report on everything – only what's relevant to the project.

What is the responsibility of a Reporter?
To complete all reporting requirements on the deadlines specified by SSEN Transmission.

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Module Overview and Objectives
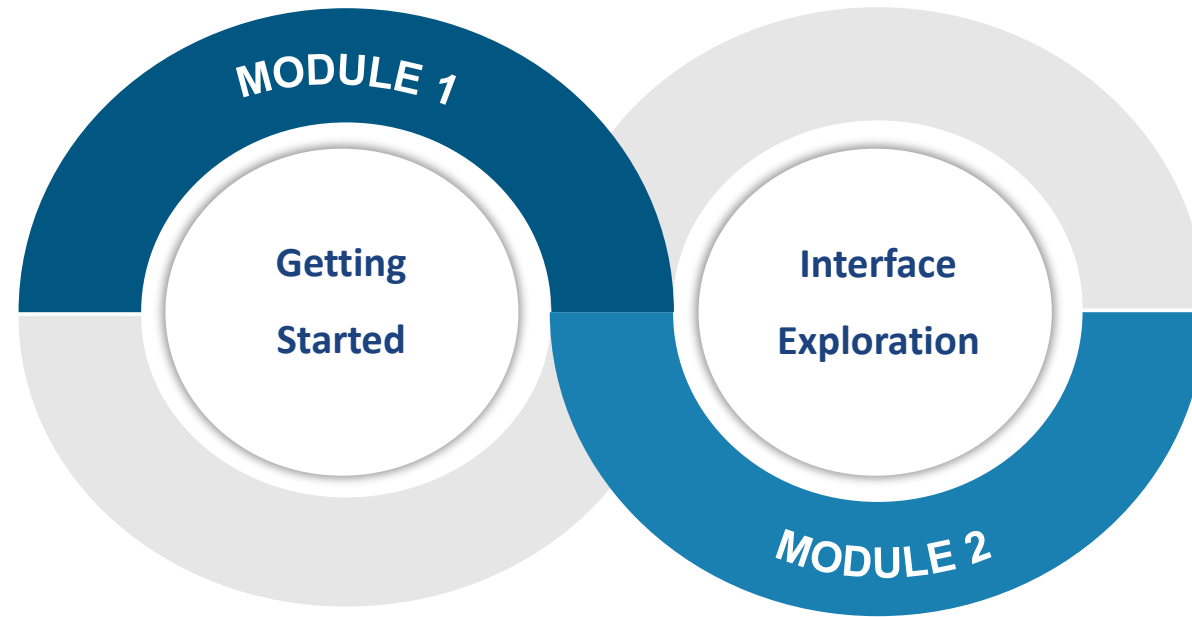
Learning Approach

Modules 1 and 2 are structured into bite-sized learning. Each module is small and is designed to show you, on a step-by-step basis, how to achieve the set learning objectives.

Show you how

This Viewer User Guide contains screenshots of the SDCT and the applicable steps to follow. Helpful notes are also included within various slides.

Please note there is no audio accompanying this presentation. If you require alternative training material, please contact the SSEN Transmission Sustainability Team.

Focus:

Establishes the steps of account set up, logging in and getting started in the system

Learning Outcomes (LO) 1, 2, 3:

I know how to…
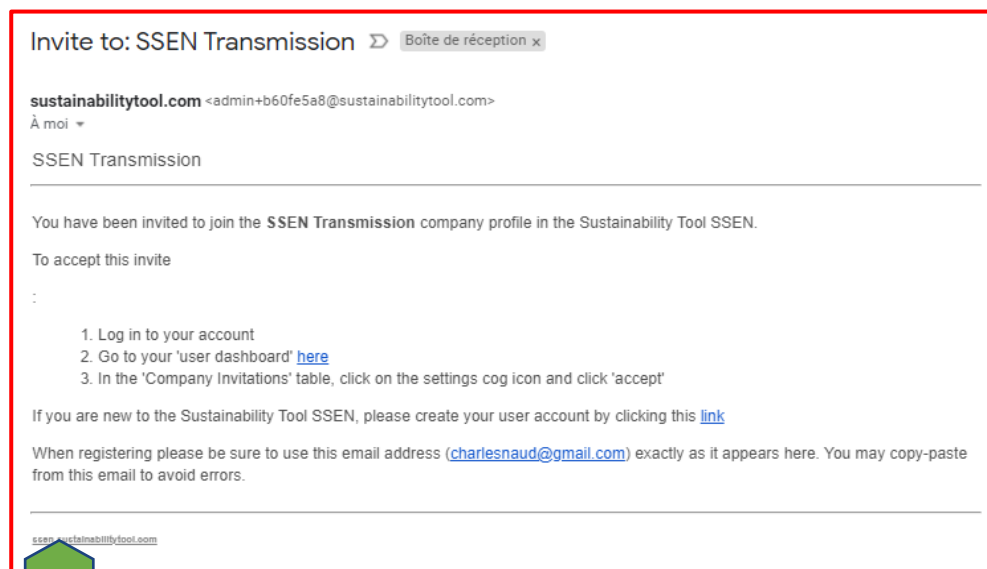
- **LO 1)** Register and set up my account ✓

- **LO 2)** Login ✓

- **LO 3)** Accept or reject invitations ✓

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How to Register (LO 1)

An email invitation will be issued to your SSEN Transmission email address, prompting you to register:

1

Step 1 – Click the link and follow the instructions

2
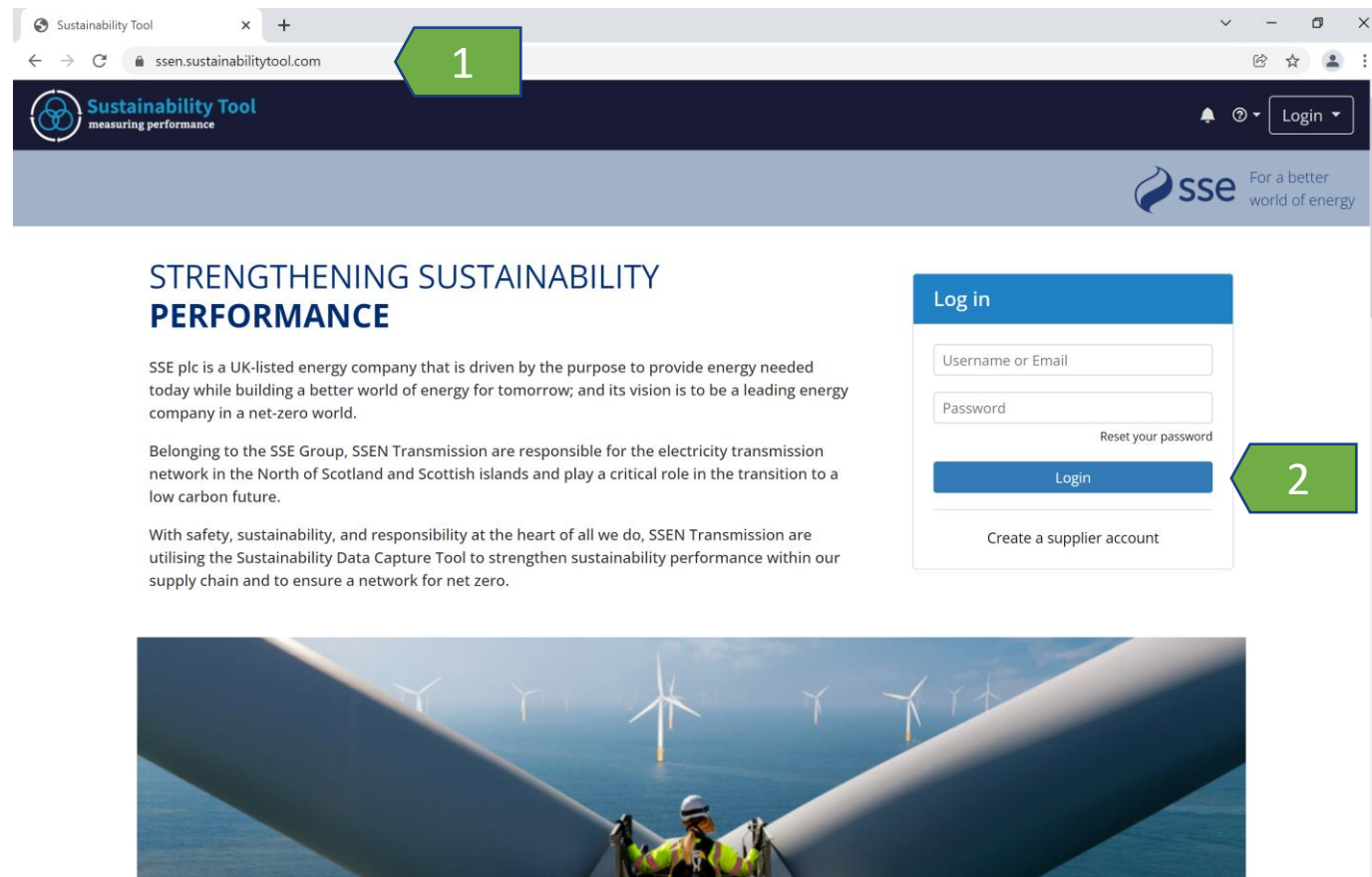
Step 2 – Fill in your details and click **Register**

*Note: The system will review whether an account with your details exists or not. If you **do have an account**, the system will give you the **option to either change the email address or reset the password. If your details are not found, the system will send an email with an activation link.** Please click the activation link and you will be taken to the log-in page.*

How to Login (LO 2)

As the SDCT is hosted on a cloud-based platform, a web browser is required. It is recommended either Edge or Google Chrome is used.

The link to the SDCT is:
https://ssen.sustainabilitytool.com/

Step 1 – Click the link and add this page to your **Bookmarks** *(select the star icon at the top right of the screen)*

Step 2 – Fill in your details and click **Login**

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Accept or Reject Invitations (LO 3)

Company Invites	1		
SSEN Transmission	Viewer	2	accept reject 3
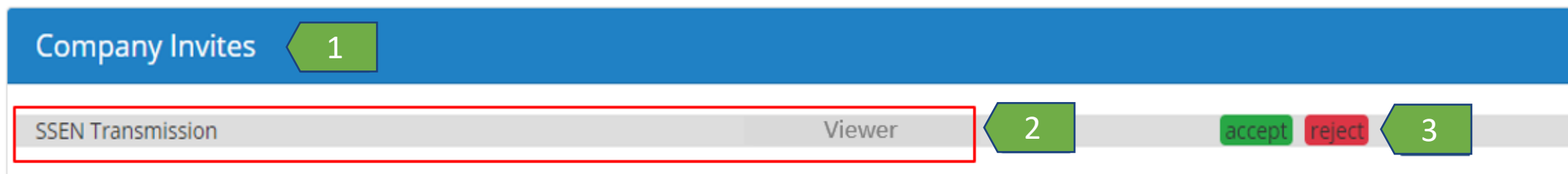
Step 1 – This page is where you will see the project invitations you have been sent

Step 2 – This tells you the project and your level of access. You will be a **Viewer**

Step 3 – **Accept** or **Reject** the invitation accordingly

Note: *Please ensure you have been invited as a* ***Viewer.*** *If this is not correct, please reject the invitation and speak to your SSE Project Co-Ordinator (who is an Admin)*

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Focus:
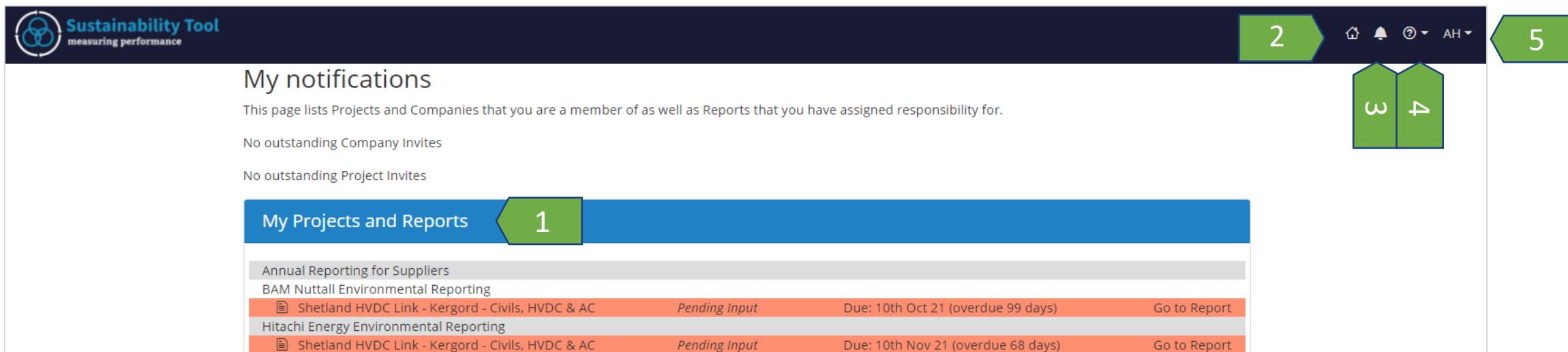
Establishes the steps of navigating the home screen, project dashboards, viewing, and exporting data

Learning Outcomes (LO) 4, 5, 6, 7:

I know how to…

- **LO 4)** Navigate the home screen ✓

- **LO 5)** Navigate project dashboards ✓

- **LO 6)** View sustainability data ✓

- **LO 7)** Export sustainability data ✓

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Navigating the Home Screen (LO 4)

Step 1 – From here you can **access your projects.**
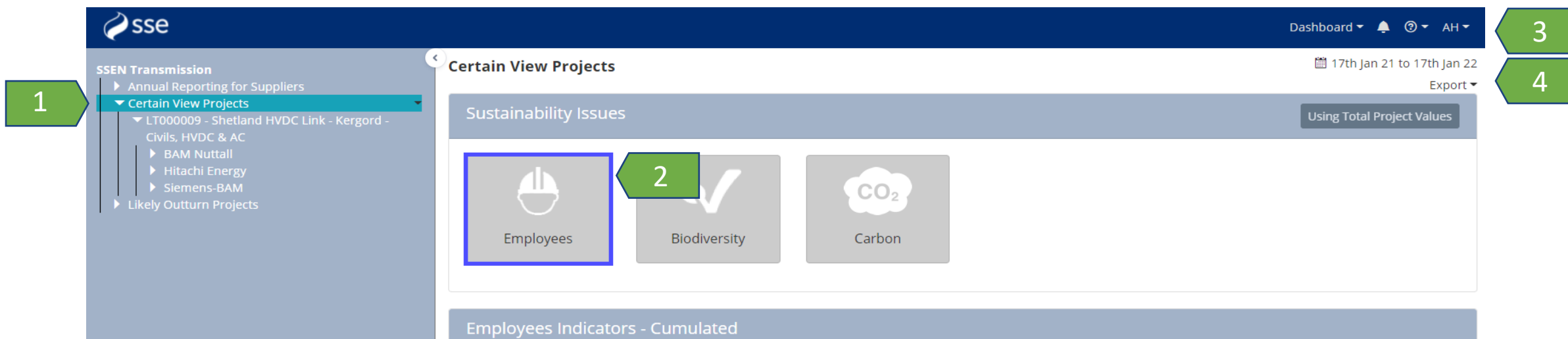
Step 2 – Takes you back to this **home page** at any time

Step 3 – My **Notifications,** this will show outstanding invitations or reports. The above screenshot showcases an overdue report in red.

Step 4 – **Additional user guides** and support hub

Step 5 – Change password and logout area

Navigating the Project Dashboards (LO 5)

Step 1 – The left hand panel shows the **structure and hierarchy** of the reporting system

Step 2 – The main panel shows tiles representing the performance categorised by the Sustainability Issues once data has been reported and approved

Step 3 – These dates will define what data is shown in the performance graphs and tables. **By default, the 'from' date will be set to 6 months ago and the 'to' date will be today's date.** If you make changes to these dates, **refresh your browser for this to be reflected**

Step 4 – Drop down to **Export data**

| Module 1 | Module 2 | Module 3 |

Navigating the Project Dashboards (LO 5)
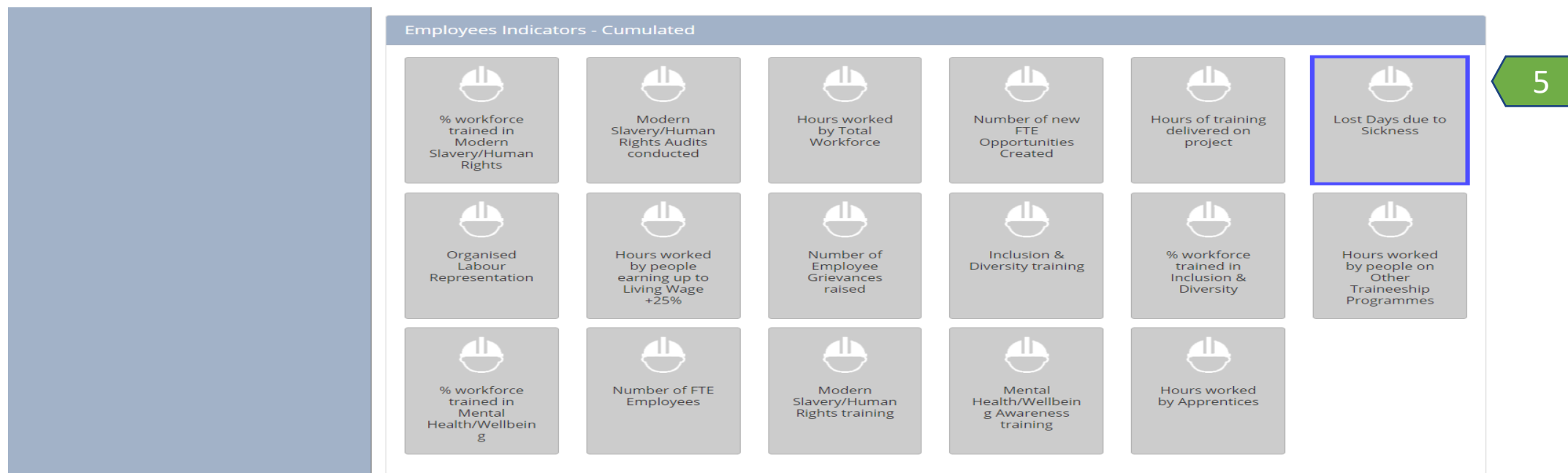
Step 5 – When you click on the tiles, the issue breaks down into indicators

Note: *Once targets have been set by the SSEN Transmission Sustainability team, these tiles will be colour-coded using a RAG-rating*

Navigating the Project Dashboards (LO 5)

6
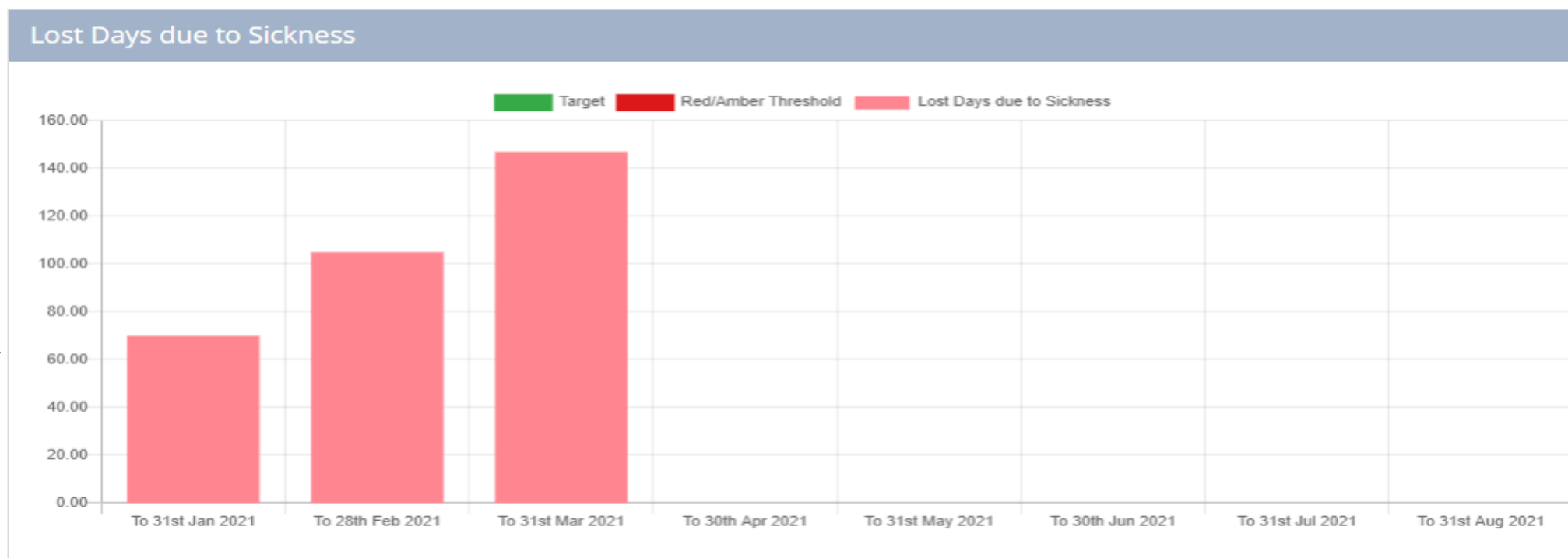
Step 6 – By clicking on a specific indicator, you can scroll down to view a bar chart displaying the monthly breakdown of data

Note: Once targets have been set by SSEN Transmission Sustainability team, these will be reflected in the bar chart. The above is fake data for training purposes.

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Viewing the Project Dashboards (LO 6)

Performance of projects for Indicator: Lost Days due to Sickness ⓘ

Period Starting	To: 31st Mar 21	To: 30th Apr 21	To: 31st May 21	To: 30th Jun 21	To: 31st Jul 21	To: 31st Aug 21
RC Test Project	147.00					
NKT - social reporting						
Siemens - environmental reporting						
Hitachi - social reporting						
NKT - environmental reporting						
RC Test Project 2						
BAM Nuttall - social reporting						
Siemens - social reporting						
Hitachi - environmental reporting						
BAM Nuttall - environmental reporting						

1
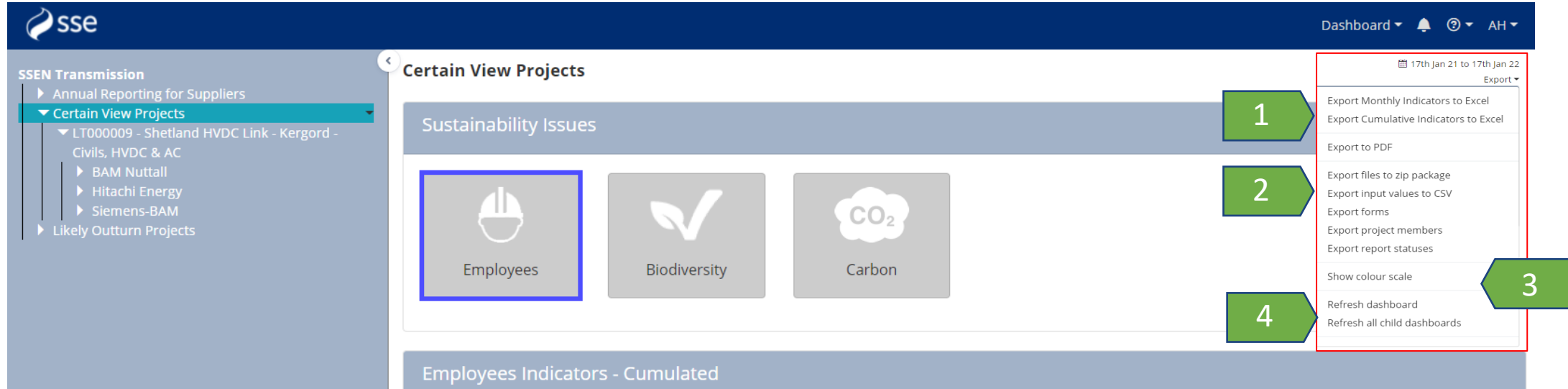
Reported metric values (monthly) for indicator: Lost Days due to Sickness ⓘ

Period Starting		To: 31st Mar 21	To: 30th Apr 21	To: 31st May 21	To: 30th Jun 21	To: 31st Jul 21	To: 31st Aug 21
Lost days due to sickness direct workforce	▾	30.00	0.00	0.00	0.00	0.00	0.00
Lost days due to sickness subcontractor workforce	▾	12.00	0.00	0.00	0.00	0.00	0.00

2

Step 1 – View the cumulative data broken down by Project

Step 2 – View the breakdown of the metric itself, if it has sub-metrics

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Exporting the Data (LO 7)

Step 1 – Download a csv file of the indicators being reported upon

Step 2 – Download a csv file of the metrics being reported upon

Step 3 – When targets have been set, a Red/Amber/Green colour scale will apply on the tiles to reflect performance against targets

Step 4 – Refresh the dashboard to get the most up-to-date information

Note: You can download reports in Excel CSV form.

Module 1   Module 2   Module 3

User Guidance Support

Step 1 – Access the User Guide for additional information

Step 2 – Search with key words

Step 3 – Use the menu to find out more

Note: *You can also access the user guidance through the following link:*

https://docs.sustainabilitytool.com/

Contact Information Support

SSEN Transmission Contact Details:
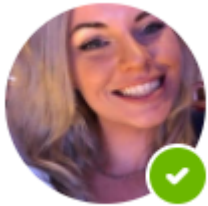
SSEN Transmission Sustainability Analyst:
Abigail.Hughes@sse.com

I.e. Issues relating to data or general queries

External Contact Details:

Robyn Conway, Consultant:
robyn@supplychainschool.co.uk

I.e. Issues relating to reporting

Tool Support Team:
info@sustainabilitytool.com

I.e. Issues relating to system

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Appendices

Appendix A – User Group RACI Matrix

Key:

R	Responsible
A	Accountable
C	Consulted
I	Informed

		Viewer	Admin	Admin	System Admin	Reporter
		Project Manager	Project Co-Ordinator	Project Manager (Network)	Sustainability Analyst	Contractor
Stage 1	Personal registration and account set-up	R	R	R	R	R
Stage 1	Accepting or rejecting personal invitations	R	R	R	R	R
Stage 2	Creating a project in the SDCT		R	R		
Stage 2	Assigning a supplier in the SDCT		R	R		
Stage 2	Assigning metrics to a project in the SDCT	I	I	R		
Stage 3	Completing monthly environmental and social reporting					R
Stage 3	Completing annual survey reporting					R
Stage 3	Approving or rejecting reports					R
Stage 4	Liaising with Reporters concerning missed deadlines	R	A	A		I
Stage 5	Responding to queries relating to processes/data				R	
Stage 5	Reviewing Joiner/Leavers		I	I	A	
Stage 5	Reassigning users to projects		I	I	A	

Viewer
Admin
System Admin
Reporter

Responsible – This is a mandatory task which must be actioned, regardless of the user group

Accountable – This is a required task which should be actioned; however, if it is not, the specific user will be required to justify their action

Consulted – This is an optional task and is there to support those who are responsible

Informed – This is a required task to ensure open communication is occurring

Please note: Due to the scope of various SSEN Transmission projects, the Admin may also be a Project Manager within Network Renewals and Connections.

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Appendix B – Frequently Asked Questions

Questions	Answers
How do we ensure reporting compliance?	The SDCT indicates whether Reports have submitted their monthly and annual reports on time. The monthly contractor project template has also been updated to include a compliance section for sustainability reporting. This is also the case for the monthly PRB meetings which showcases all contractor compliance.
How is the information audited?	The first year of the SDCT focuses on reporting compliance to drive the correct behaviours in our supply chain. In the future, once we transition into a performance measurement space, information will be audited. We are reliant on the supplier providing the correct information and understand this is a risk; however, this is the beginning of the journey.
How do I ensure reports aren't duplicated if I have a Principal Contractor and other contractors on a project?	The Principal Contractor will have ownership of the project site. It is expected the Principal Contractor collates data from the contractors for the reporting submission; however, the contractors can also report directly. The Project Manager should guide discussions to avoid reporting confusion in this instance.

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Appendix B – Frequently Asked Questions

Questions	Answers
At a project level, am I required to feed into a wider sustainability reporting procedure or is this managed by the SSEN Transmission Sustainability team?	There will not be any project-level additional costs other than the Contractor's time to report the sustainability data within the SDCT. The requirement to report was included in contracts via the RIIO-T2 Supply Chain Sustainability Works Information.
Does the Supply Chain Sustainability Reporting System replace any of the existing HSE reporting requirements on current projects relating to incidents and compliance reporting?	No, the Supply Chain Sustainability Reporting System is solely focused on our wider sustainability commitments which relate to environmental and social issues.
Will the CES CEMP template be replaced in reference to Waste Management Plans, Quarterly Resource & Waste Reports (template TEM-NET-ENV-502)?	Yes, this template will be superseded by the SDCT as this incorporates monthly reporting on carbon, waste and other sustainability data in a web-based portal. These reporting requirements are part of the new framework contracts.

Appendix B – Frequently Asked Questions

Questions	Answers
If I have a suggestion for future improvements, who should I contact?	Please contact Abigail.Hughes@sse.com. Abigail is the Sustainability Analyst leading the SDCT implementation amongst user groups.
Will the new Supply Chain Sustainability Reporting System change my way of working significantly?	Four key user groups were identified to deliver this digital change. Change impacts have been identified which range from low, medium and high within the user groups. A high-level overview can be seen below of the user groups by impact level: Viewers: Low Admin: High System Admin: High Reporters: High