



Microsoft Cloud for Sustainability **in a Day**

Lab 01: Organization Setup

Step-by-Step Lab

15 minutes

April 2023

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Overview

Background

In this lab for Microsoft Cloud for Sustainability you will build on top of demo data to configure the “Set up organization and reference data” scenario for Microsoft Sustainability Manager. Contoso Corp (*organization present in the demo data*) is a specialty Coffee distribution business with operations in APAC, US, Africa, and Europe.

Contoso Corp is experiencing Supply chain challenges to transport its finished goods across the USA and wants to augment its transportation and logistics capacities. To meet this challenge, Contoso Corp acquires a transportation business called Wide World Importers based in Florida, USA. Wide World Importers has two office facilities with 100 employees that coordinate a fleet of 40 electric trucks that will be used for transportation of finished goods across the USA.

Learning Objectives

In this lab, you will perform the following:

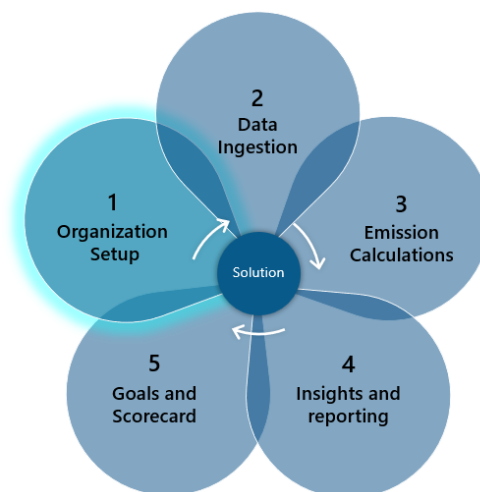
- Review the company profile for Contoso Corp, add Wide World Importers to the organizational structure, and add the two Florida facilities
- Create reference data for contractual types
- Create units with conversion factor
- The newly created data during this lab exercise will form the foundation for the rest of the scenarios (data ingestion, calculations, and reporting) in the upcoming lab exercises.

Prerequisites

- Microsoft Sustainability manager environment is set up with sample data

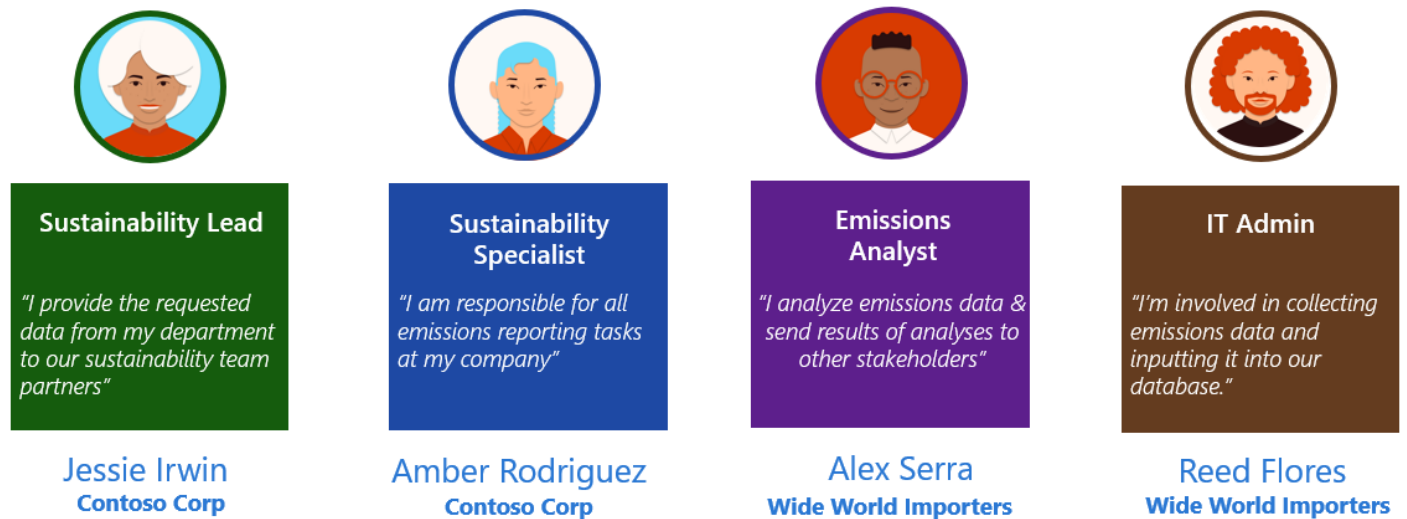
Solution Focus Area

Organization setup focuses on the foundational steps required to configure the Microsoft Sustainability Manager application. These foundational steps will create the company profile, set up organizational structure and hierarchy, and corresponding facilities. After this, reference data will be set up that includes important information such as fuel types, vehicle types, contractual instrument types, and units. Some of this reference data is unique to an organization, and some will come from standard or industry sources.

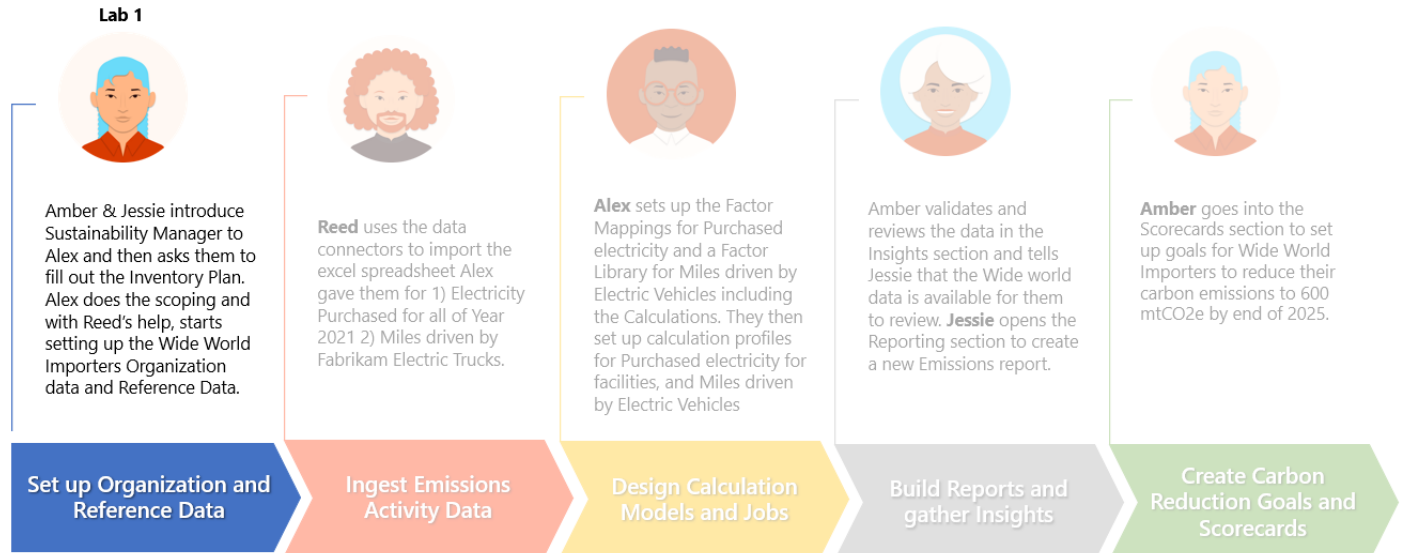


Personas and Scenarios

In this lab, Jessie Irwin – Sustainability lead for Contoso Corp and Amber Rodriguez - Sustainability Specialist for Contoso Corp educate Alex Serra of Wide World importers on the tools and processes used for Contoso's Sustainability reporting. Jessie guides Alex to build an inventory management plan by listing out the operating boundaries, facilities, and emission sources. Jessie and Amber demonstrate "Microsoft Sustainability Manager" and share the inventory plan template with Alex Serra – Emissions Analyst and Reed Flores – IT Admin. After completing the Inventory plan template - together, Alex and Reed set up the Company Profile, Organization data and Reference data based on the data provided by Amber in the Inventory plan.



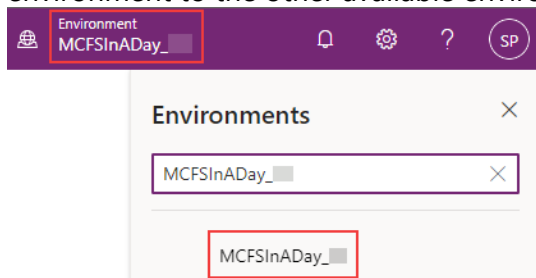
In this lab exercise, we will focus on the scenarios illustrated below:



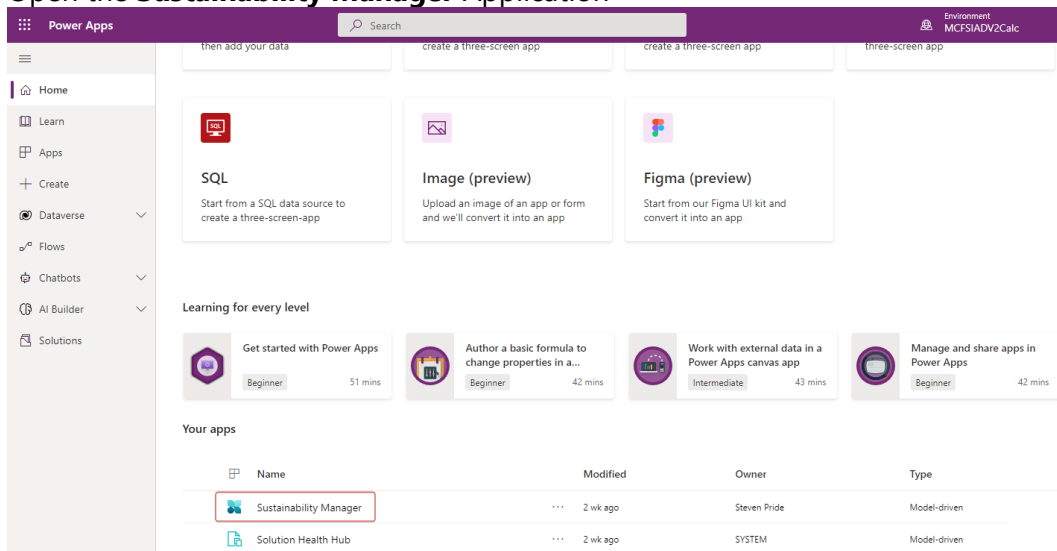
Exercise 1: Set up company profile and reference data

In this exercise, you will learn about the steps that Alex and Reed take to set up Wide World Imports company profile, organizational data, and reference data. You can explore this functionality in deeper detail on Microsoft Docs, please visit [Set up a company profile](#).

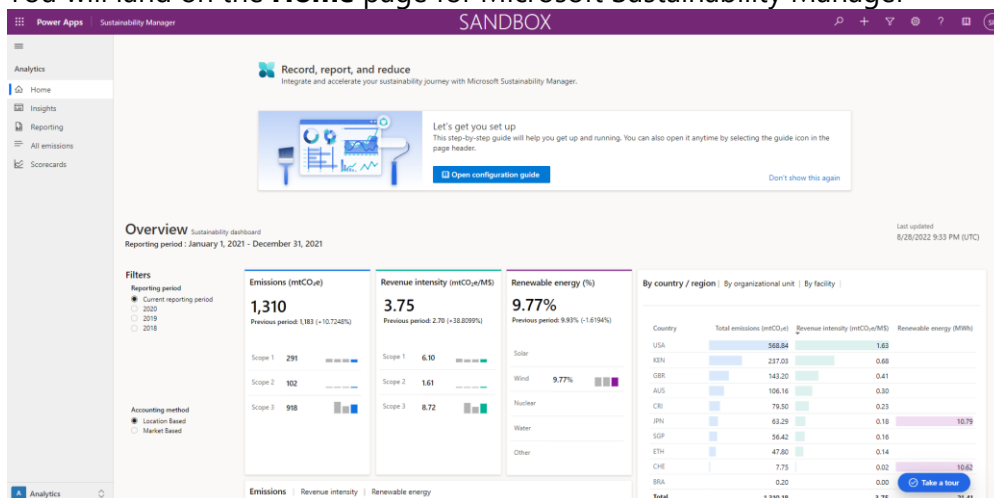
- For our Instructor Lead Training, we suggest using In-private browsing, or a new browser profile.
- For our Instructor Lead Training, log in to <https://make.powerapps.com> using the user account that has been assigned to you.
- For our Instructor Lead Training, please use the environment selector to switch from the default environment to the other available environment, with either MCfS or Sustainability in its name.



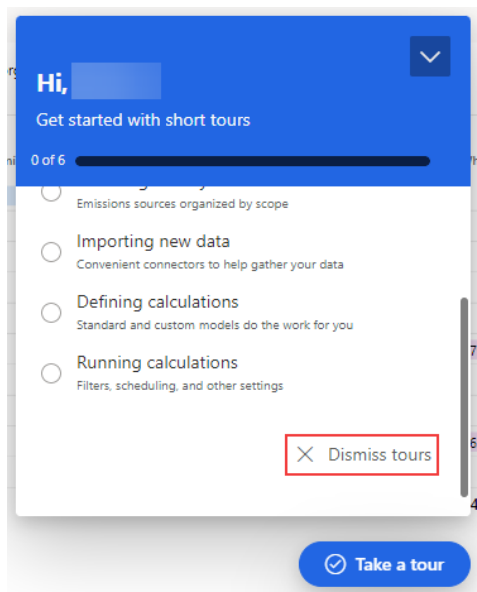
- Open the **Sustainability Manager** Application



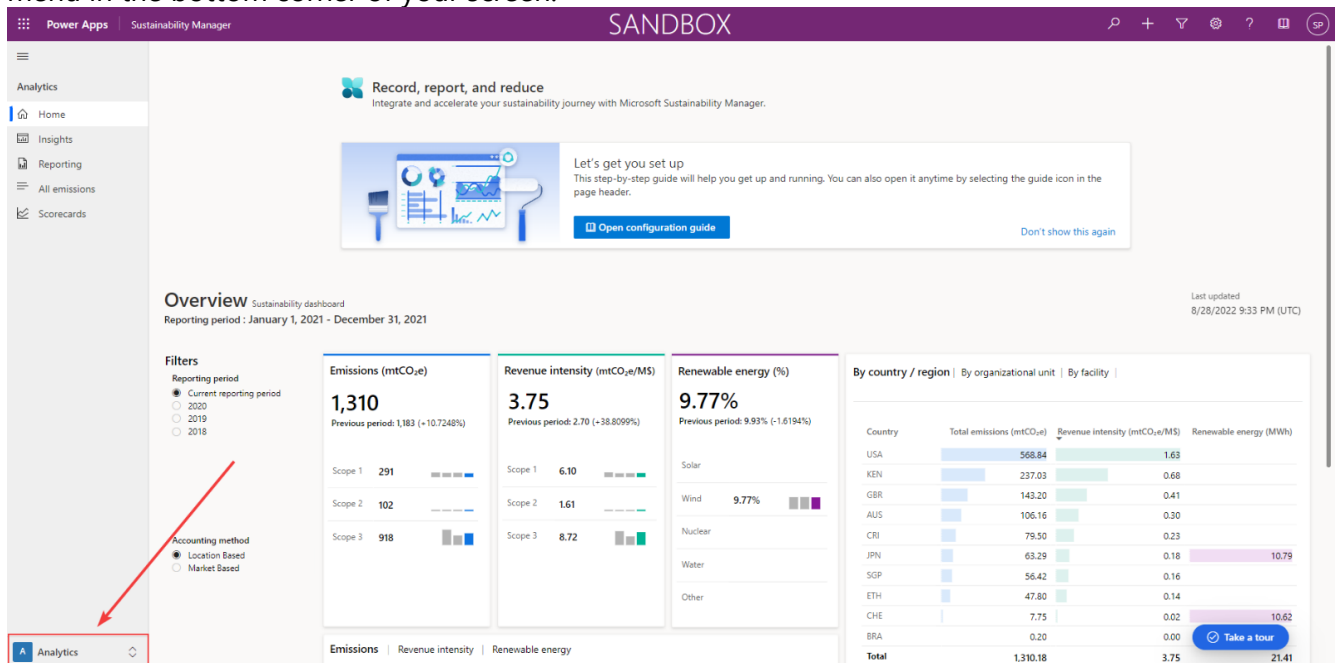
- You will land on the **Home** page for Microsoft Sustainability Manager



Note: You can dismiss the Product tour by scrolling down and clicking on the "Dismiss tour" button.



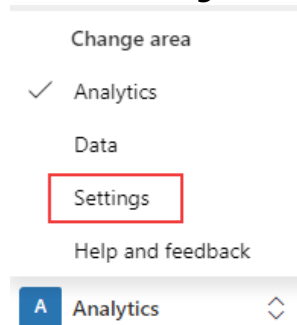
- Area navigation is a common first step in each lab and exercise. You can find the area navigation menu in the bottom corner of your screen.



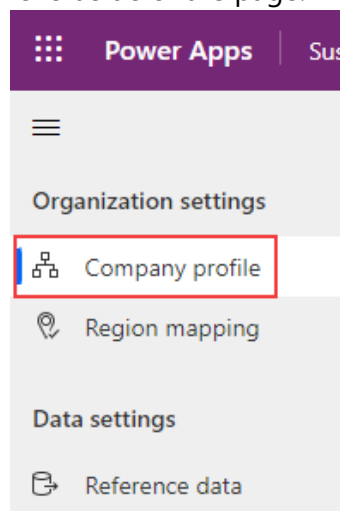
Task 1: Setup the Company profile, hierarchy, and facilities

In this task, Alex sets up the Company profile, hierarchy, and facilities for the Wide World Importers organization in Microsoft Sustainability Manager.

1. In the bottom left corner, change your Area to **Settings**



2. Navigate to **"Company profile"** on the left side of the page.



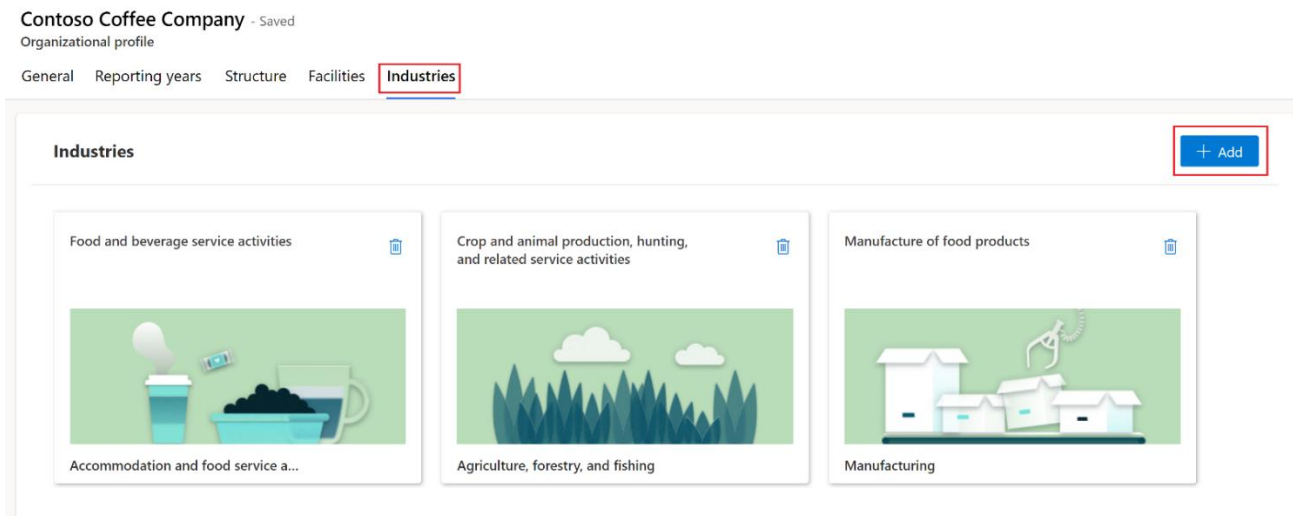
3. The Company profile page includes basic information about the organization, such as name, address, company logo, the annual reporting period, and relevant industries. Additionally, there are tabs at the top of the page for setting up organization structure and facilities, both will be covered in this exercise.

Contoso Coffee Company - Saved
Organizational profile

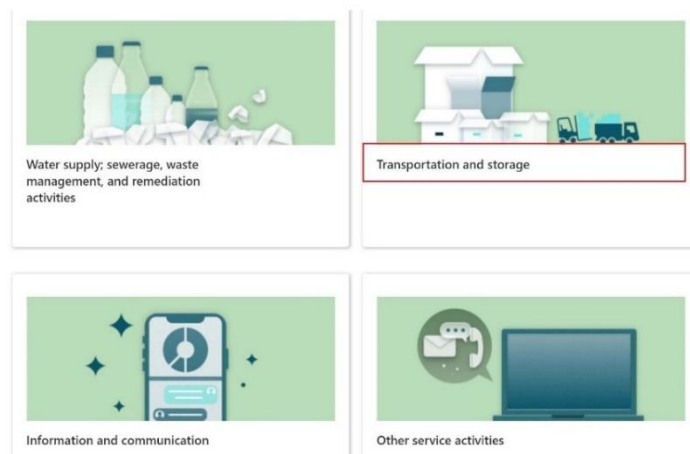
General Reporting years Structure Facilities Industries

Basic Information	
Name	* Contoso Coffee Company
Address line 1	* Contoso Road
Address line 2	---
State/Province	* IL
Postal code	* 62001
City	* Alhambra
Country/Region	* United States of America

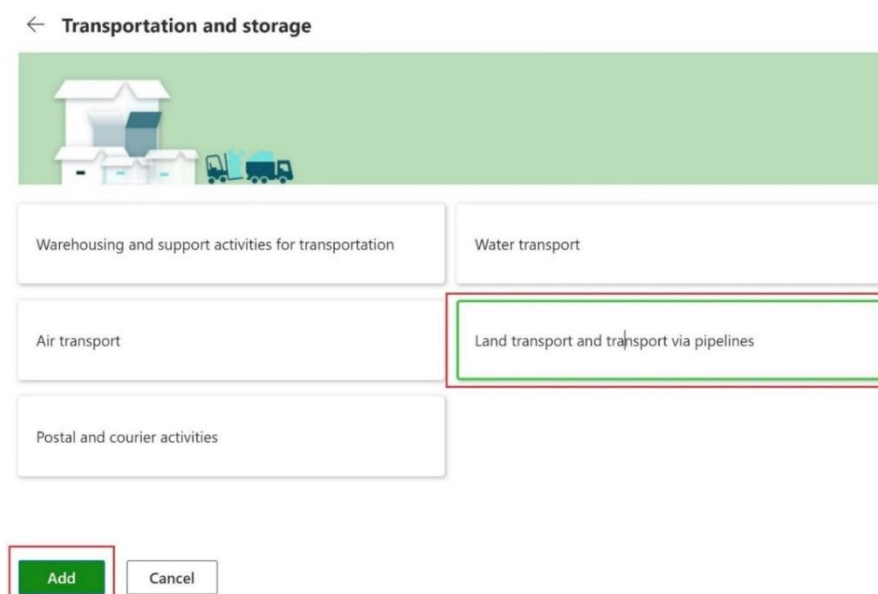
4. On the **Company profile** page, Click on **Industries** Tab. Microsoft Sustainability Manager includes a selection of pre-defined industries and sub-verticals based on NACE standards, [NACE Code](#).
Click +Add



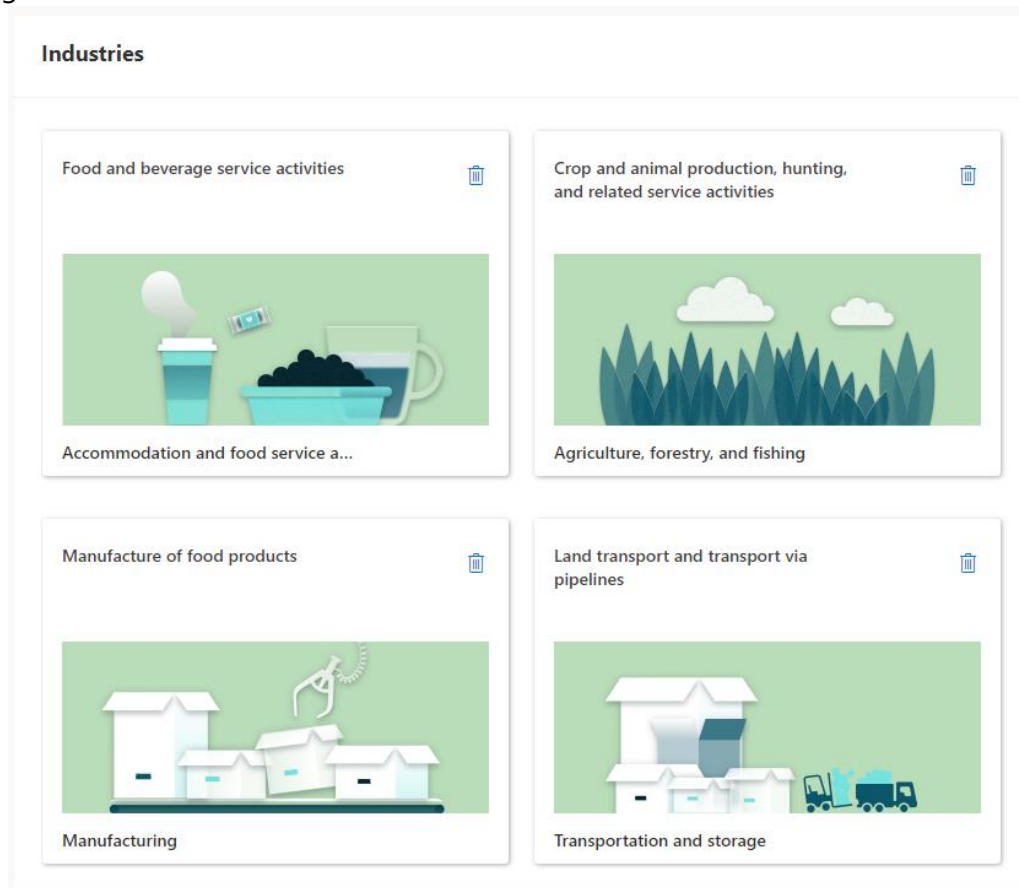
5. In the **Industries** section select **Transportation and storage**



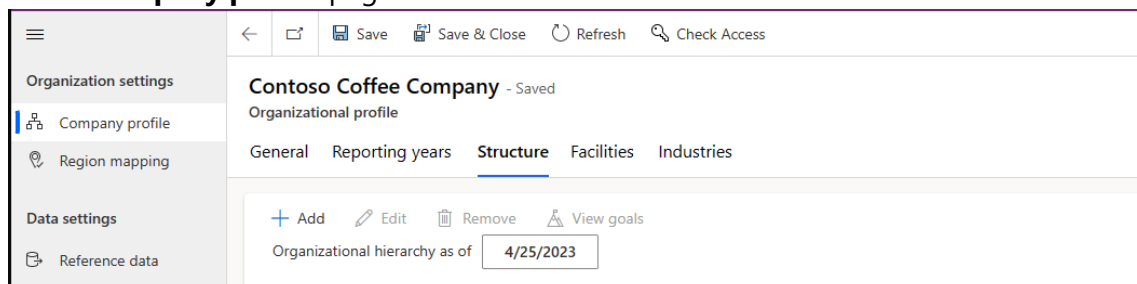
6. In the next screen select **“Land transport and transport via pipelines”** and select **“Add”**



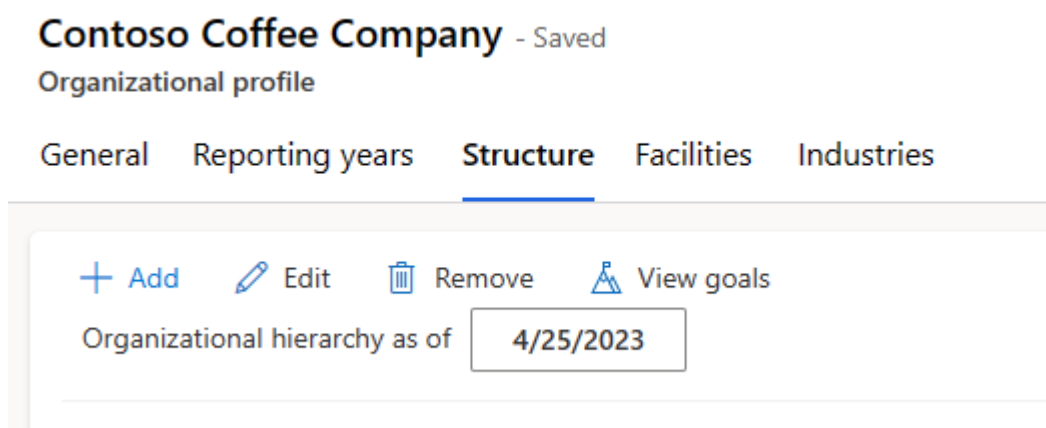
7. "Land transport and transport via pipelines" is now visible in the **Industries** tab of the **Company profile** page



8. In the **Company profile** page switch to the **Structure** tab



9. Select **Add** to add a new organizational unit.



10. Enter the following data for organizational unit and **Click Save** in the button pane.

- **Name:** Wide World Importers
- **Organizational unit type:** Department

The screenshot shows the 'New Organizational unit' form with the following fields:

- Name: ---
- Description: ---
- Organizational unit type: ---
- Latitude: ---
- Longitude: ---
- Connection: ---
- Address line 1: ---
- Address line 2: ---
- Address: City: --- County: ---
- ZIP/Postal code: --- State/Province: ---
- Country/Region: Select country/region
- Origin correlation ID: ---

Below the form, the 'Wide World Importers' record is shown with the following data:

- Name: * Wide World Importers
- Description: ---
- Organizational unit type: * Department
- Latitude: ---
- Longitude: ---
- Connection: ---

The 'Organizational hierarchies (Organizational unit)' section is also visible, showing a table with columns: Organization..., Parent ↑, Effective sta..., Effective en..., Connection, and Origin corre... The table is currently empty, displaying 'No data available'.

11. In the Organizational hierarchies section, **which appears after clicking Save**, click + **New Organizational hierarchy**

The screenshot shows the 'Organizational hierarchies (Organizational unit)' section. The table is empty, displaying 'No data available'. The 'New Organizational hierarchy' button is highlighted with a red box. The button is located in the top right corner of the section, next to the 'Search this view' button.

12. Set the following values and click **Save & Close**

- **Parent:** Contoso USA
- **Effective start date:** The first day of the current month(MM/DD/YYYY)

← ↗ Save Save & Close + New ⌵ Flow

New Organizational hierarchy - Unsaved

General

Organizational unit *	Wide World Importers	Effective start date *	8/1/2022
Parent	Contoso USA	Effective end date	---
Connection	---	Origin correlation ID	---

13. After being returned to the Organizational Unit, click **Save & Close** to return to the **Company profile**

← ↗ Save Save & Close + New Deactivate Delete Ref

Wide World Importers - Saved

Organizational unit

General Monthly revenue Related

Name *	Wide World Importers
Description	---
Organizational unit type *	Department

14. Navigate to **Company profile** switch to **Facilities** tab page and select **Add facility**

← ↗ Save Save & Close Refresh Check Access

Contoso Coffee Company - Saved

Organizational profile

General Reporting years Structure **Facilities** Industries

Add facility Manage connection

Search

15. Create a new Facility with the following details. Once the values are entered, select **Save & Close**

- **Name:** Wide World Importers - Miami Office
- **Address line 1:** Brickell Avenue
- **City:** Miami
- **State:** Florida
- **Zip:** 33132
- **Country:** United states of America
- **Latitude:** 25.774320
- **Longitude:** -80.187720

Note: Latitude and Longitude are not required but are used to display a pin on the Facilities map. They can be automatically added by selecting an address from the autocomplete options in Address line 1, or manually entered.

New Facility - Unsaved

General

Name	* Wide World Importers - Miami Office	Address line 1		* Brickell Avenue	
Facility type	Look for Facility type	Address line 2		---	
Latitude	0.0000000000	City	* Miami	County	---
Longitude	0.0000000000	State/Province	---	ZIP/Postal code	* 33132
Water risk index	---	Country/Region	* United States of America		
Water basin	---	Origin correlation ID	---		
Connection	---				

Note: Pay close attention to the data entered. The following labs will reference this data, and it will need to match

16. Using the same steps, add another new **Facility**. Once the values are entered, select **Save & Close**

- **Name:** Wide World Importers - Tampa Office
- **Address line 1:** Lois Avenue
- **City:** Tampa
- **State:** Florida
- **Zip:** 33609
- **Country:** United states of America
- **Latitude:** 27.944830
- **Longitude:** -82.514050

Wide World Importers - Tampa Office - Saved

Facility

General Related

Name	* Wide World Importers - Tampa Office	Address line 1		* Lois Avenue	
Facility type	---	Address line 2		---	
Latitude	0.0000000000	City	* Tampa	County	---
Longitude	0.0000000000	State/Province	Florida	ZIP/Postal code	* 33609
Water risk index	---	Country/Region	* United States of America		
Water basin	---	Origin correlation ID	---		
Connection	---				

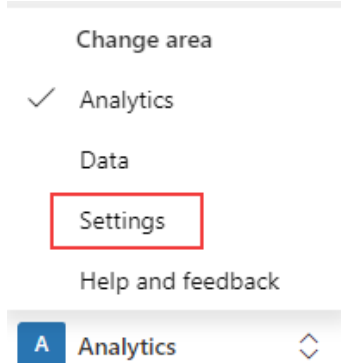
Note: Pay close attention to the data entered. The following labs will reference this data, and it will need to match

Great job, by completing these steps, you have completed the organizational setup. Organizational structure and facility management will be linked to activity and emission data to group emissions by Organization, facility, and even regions. This is an important part of carbon emission reporting and organization disclosures. **Please continue to the next task.**

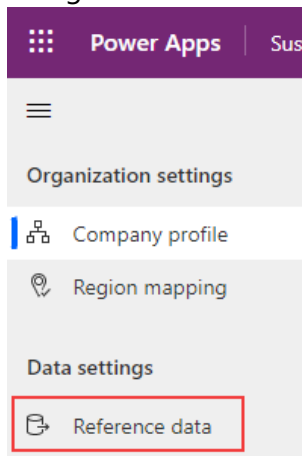
Task 2: Setup reference data

In this task, Reed sets up the reference data for contractual instrument types in Microsoft Sustainability Manager. Contractual instrument types are the different types of contractual agreements that a firm has with their providers and suppliers.

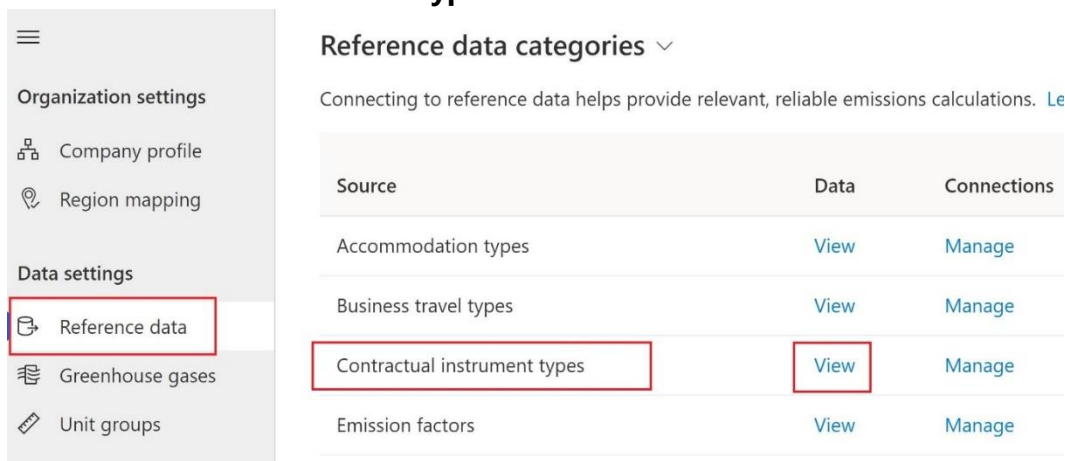
1. In the bottom left corner, change the Area to **Settings**



2. Navigate to **"Reference data"** on the left side of the page.



3. Select **Contractual instrument types** and select **View**



Source	Data	Connections
Accommodation types	View	Manage
Business travel types	View	Manage
Contractual instrument types	View	Manage
Emission factors	View	Manage

4. Under **Active contractual instrument types** > Select **New** to create new contractual types

← Show Chart **+ New** Delete | Refresh Email a Link | Flow Run Report

Active contractual instrument types ▾ Edit columns Edit filters

Name ↑ ▾	Created on ▾	Description ▾	Energy source ▾	Co
Green Republic Cooling	6/21/2022 4:51 PM		Solar	
Green Republic Electricity Services Solar	6/21/2022 4:51 PM		Solar	

5. Create a new Contractual Instrument with the following details. Once entered, select **Save & Close** in the button pane.

- Name:** VanArsdel Ltd
- Energy source:** Nuclear

← Save **Save & Close** + New Flow ▾

New Contractual instrument type - Unsaved

General

Name *	VanArsdel Ltd	Energy source *	Nuclear ▾
Description	---	Origin correlation ID	---

Note: Pay close attention to the data used in this lab. The following labs will reference this data, and it will need to match exactly as seen in the lab.

6. In the same way, again create a new Contractual Instrument with the following details. Once entered, select **Save & Close** in the button pane.

- Name:** Adatum Corp
- Energy source:** Other

← Save **Save & Close** + New Flow ▾

New Contractual instrument type - Unsaved

General

Name *	Adatum Corp	Energy source *	Other ▾
Description	---	Origin correlation ID	---

Note: Pay close attention to the data used in this lab. The following labs will reference this data, and it will need to match exactly as seen in the lab.

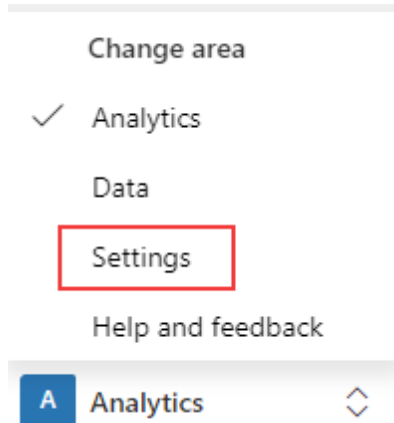
Great job, by completing these steps, you have added contractual instrument types. There are many types of reference data, take some time after this lab to explore the other reference data types, they will be used throughout Microsoft Cloud for Sustainability, and Microsoft Sustainability Manager. **Please continue to the next task.**

Task 3: Setup Unit conversion factor

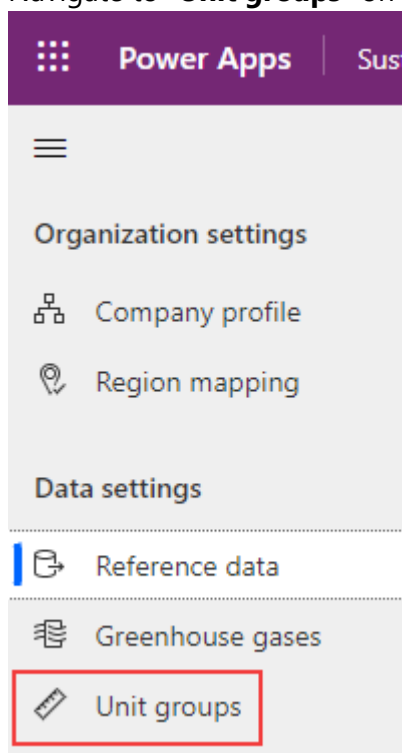
In this task, Reed sets up a unit conversion factor in Microsoft Sustainability Manager. While reviewing the inventory management plan, Alex identifies a missing unit of distance needed to calculate emissions for the fleet of electric vehicles. They ask Reed to add a new unit to the Length/Distance unit group.

Unit Groups are used to group units together and define a base unit used to convert between unit types. For example, the Length/Distance unit group contains units of length and distance, with a base unit of meter (m). The units within the Length/Distance unit group have conversions between the unit type and meter, such as miles convert to 1,609.344 meters. You can explore this functionality in deeper detail on Microsoft Docs, please visit [Set up unit groups](#).

1. In the bottom left corner, change the Area to **Settings**



2. Navigate to “**Unit groups**” on the left side of the page.



- Under **Active unit groups**, Select **Length/distance** and open

Name	Base unit	Reporting unit
Currency	USD 2018	
Energy	J	MWh
Length/distance	m	m
Occupancy	Passenger	
Stay duration	Night stay	
Volume	L	L
Weight/mass	kg	mtCO2e

- Select + **New unit** to create new unit.

Length/distance - Saved
Unit group

General Related

Name: **Length/distance**
Description: ---
Base unit: m
Reporting unit: m

Name	Conversion factor	Is base unit	Base unit
ft	0.3048000000	No	m
Km	1,000.0000000000	No	m

- Enter the following details to create a new unit. Once entered, select **Save & Close** from the button pane.

- Name:** 100 mile
- Conversion factor:** 160934.40

New Unit - Unsaved

General

Name: **100 mile**
Conversion factor: **160,934.4000000000**
Base unit: m
Is base unit: No
Unit group: Length/distance

Buttons: Save, **Save & Close**, New, Flow

Note: The EPA calculates electric vehicle efficiency by the number of kilowatt hours (kWh) used per 100 miles. For consistency, it is best practice to utilize the same units that you find in industry standards.

Congratulations! By completing these steps, you have completed the organizational and reference data setup. Organization and reference data is the foundation of the Microsoft Cloud for Sustainability and Microsoft Sustainability Manager. These data points are used throughout the tools, so it is important to spend the time to ensure that your organization and reference data is set up correctly.