



Microsoft Cloud for Sustainability **in a Day**

Lab 01: Organization Setup

Step-by-Step Lab

15 minutes

March 2023

Contents

Overview.....	3
Background.....	3
Learning Objectives	3
Prerequisites.....	3
Solution Focus Area.....	3
Personas and Scenarios.....	4
Exercise 1: Set up company profile and reference data	5
Task 1: Setup the Company profile, hierarchy, and facilities.....	7
Task 2: Setup reference data	13
Task 3: Setup Unit conversion factor.....	15

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. 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:

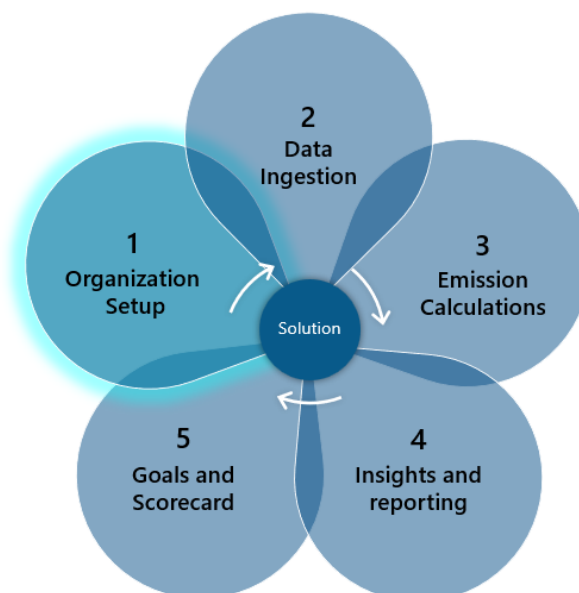
- Review the company profile for Contoso Corp, add Wide World Importers to the organizational structure, and add the two Florida facilities.
- Create reference data for contractual types.
- Create units with conversion factors.
- The newly created data during this lab exercise will form the foundation 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.

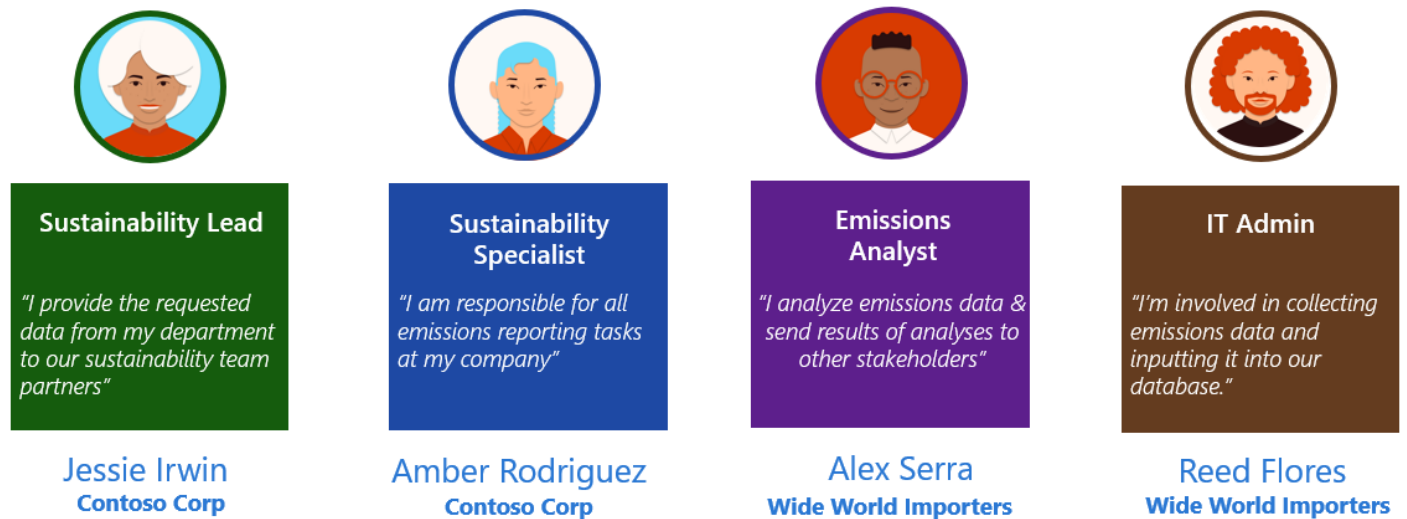
Solution Focus Area

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.

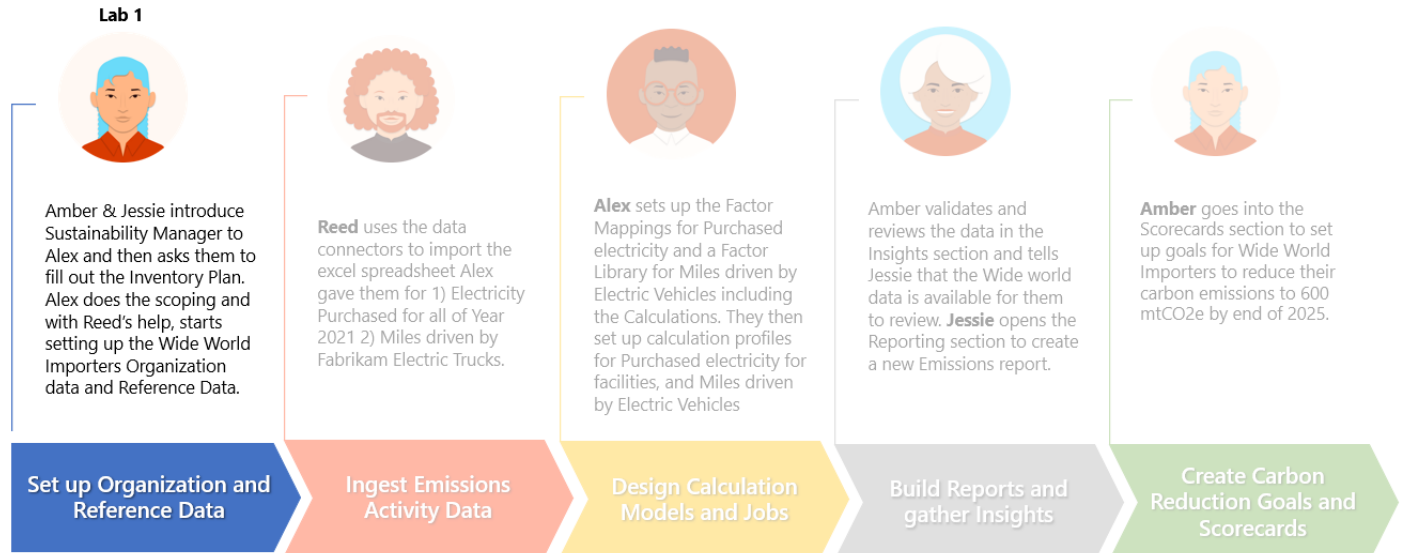


Personas and Scenarios

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.



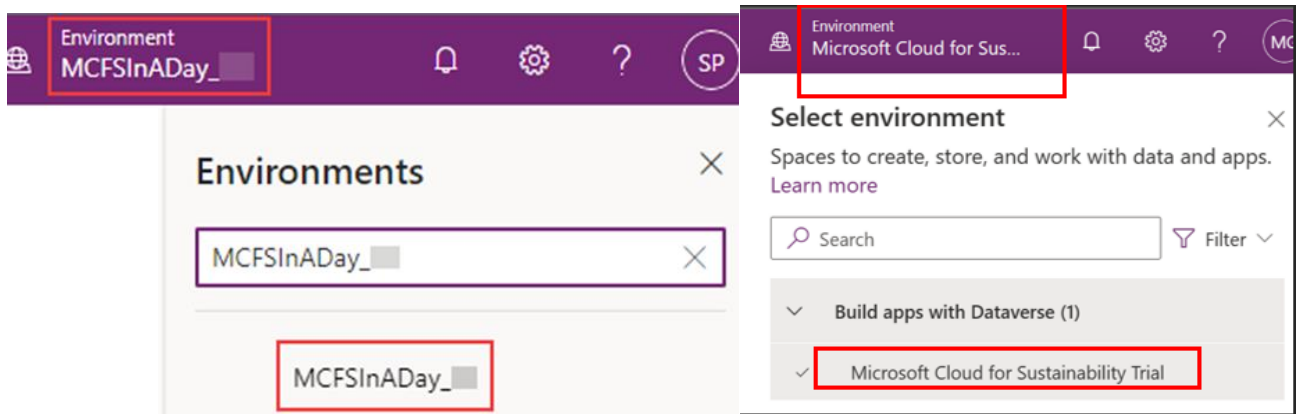
In this lab exercise, we will focus on the scenarios illustrated below:



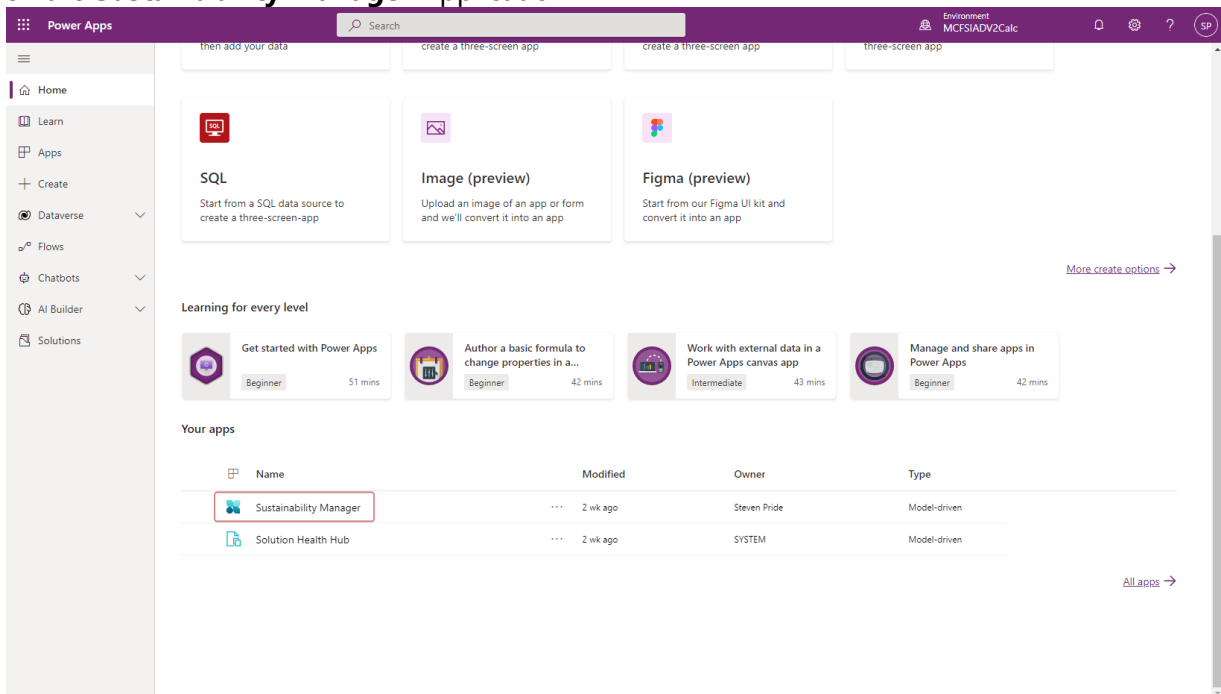
Exercise 1: Set up company profile and reference data

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 ensure you have the correct environment selected on the top right corner, it should be either **MC4SInADay_XX** or **Microsoft Cloud for Sustainability Trial** whichever of the two you see should be selected.



- Open the **Sustainability Manager** Application



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

Record, report, and reduce
Integrate and accelerate your sustainability journey with Microsoft Sustainability Manager.

Let's get you set up
This step-by-step guide will help you get up and running. You can also open it anytime by selecting the guide icon in the page header.
[Open configuration guide](#) [Don't show this again](#)

Overview Sustainability dashboard
Reporting period: January 1, 2021 - December 31, 2021
Last updated: 8/28/2022 9:33 PM (UTC)

Filters
Reporting period: ☒ Current reporting period, ☐ 2020, ☐ 2019, ☐ 2018
Accounting method: ☒ Location Based, ☐ Market Based

Emissions (mtCO₂e)
1,310
Previous period: 1,183 (+10.7248%)
Scope 1: 291, Scope 2: 102, Scope 3: 918

Revenue intensity (mtCO₂e/M\$)
3.75
Previous period: 2.70 (+38.8099%)
Scope 1: 6.10, Scope 2: 1.61, Scope 3: 8.72

Renewable energy (%)
9.77%
Previous period: 9.93% (-1.6194%)
Solar, Wind (9.77%), Nuclear, Water, Other

By country / region | By organizational unit | By facility

Country	Total emissions (mtCO ₂ e)	Revenue intensity (mtCO ₂ e/M\$)	Renewable energy (MWh)
USA	568.84	1.63	
KEN	237.03	0.68	
GBR	143.20	0.41	
AUS	106.16	0.30	
CRI	79.50	0.23	
JPN	63.29	0.18	10.79
SGP	56.42	0.16	
ETH	47.80	0.14	
CHE	7.75	0.02	10.62
BRA	0.20	0.00	
Total	1,310.18	3.75	21.41

Hi,
Get started with short tours
0 of 6
☐ Emissions sources organized by scope
☐ Importing new data
 Convenient connectors to help gather your data
☐ Defining calculations
 Standard and custom models do the work for you
☐ Running calculations
 Filters, scheduling, and other settings
[Dismiss tours](#)
[Take a tour](#)

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.

Record, report, and reduce
Integrate and accelerate your sustainability journey with Microsoft Sustainability Manager.

Let's get you set up
This step-by-step guide will help you get up and running. You can also open it anytime by selecting the guide icon in the page header.
[Open configuration guide](#) [Don't show this again](#)

Overview Sustainability dashboard
Reporting period: January 1, 2021 - December 31, 2021
Last updated: 8/28/2022 9:33 PM (UTC)

Filters
Reporting period: ☒ Current reporting period, ☐ 2020, ☐ 2019, ☐ 2018
Accounting method: ☒ Location Based, ☐ Market Based

Emissions (mtCO₂e)
1,310
Previous period: 1,183 (+10.7248%)
Scope 1: 291, Scope 2: 102, Scope 3: 918

Revenue intensity (mtCO₂e/M\$)
3.75
Previous period: 2.70 (+38.8099%)
Scope 1: 6.10, Scope 2: 1.61, Scope 3: 8.72

Renewable energy (%)
9.77%
Previous period: 9.93% (-1.6194%)
Solar, Wind (9.77%), Nuclear, Water, Other

By country / region | By organizational unit | By facility

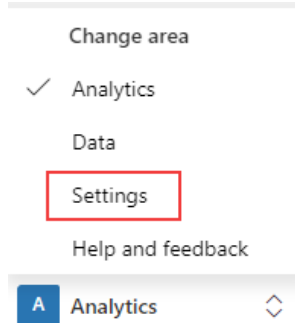
Country	Total emissions (mtCO ₂ e)	Revenue intensity (mtCO ₂ e/M\$)	Renewable energy (MWh)
USA	568.84	1.63	
KEN	237.03	0.68	
GBR	143.20	0.41	
AUS	106.16	0.30	
CRI	79.50	0.23	
JPN	63.29	0.18	10.79
SGP	56.42	0.16	
ETH	47.80	0.14	
CHE	7.75	0.02	10.62
BRA	0.20	0.00	
Total	1,310.18	3.75	21.41

Analytics | Home | Insights | Reporting | All emissions | Scorecards

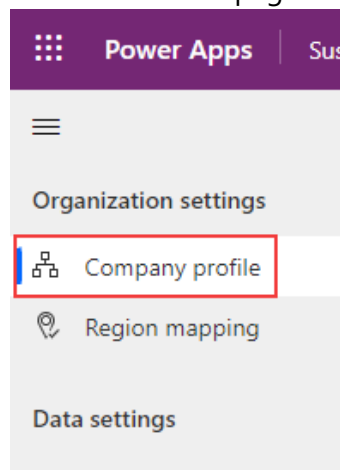
Task 1: Setup the Company profile, hierarchy, and facilities

In this task, Alex, the Emissions Analyst at Wide World Importers, sets up the Company profile, hierarchy, and facilities for the Wide World Importers acquisition in Contoso Corp's Microsoft Sustainability Manager instance.

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 | Structure | Facilities | Industries

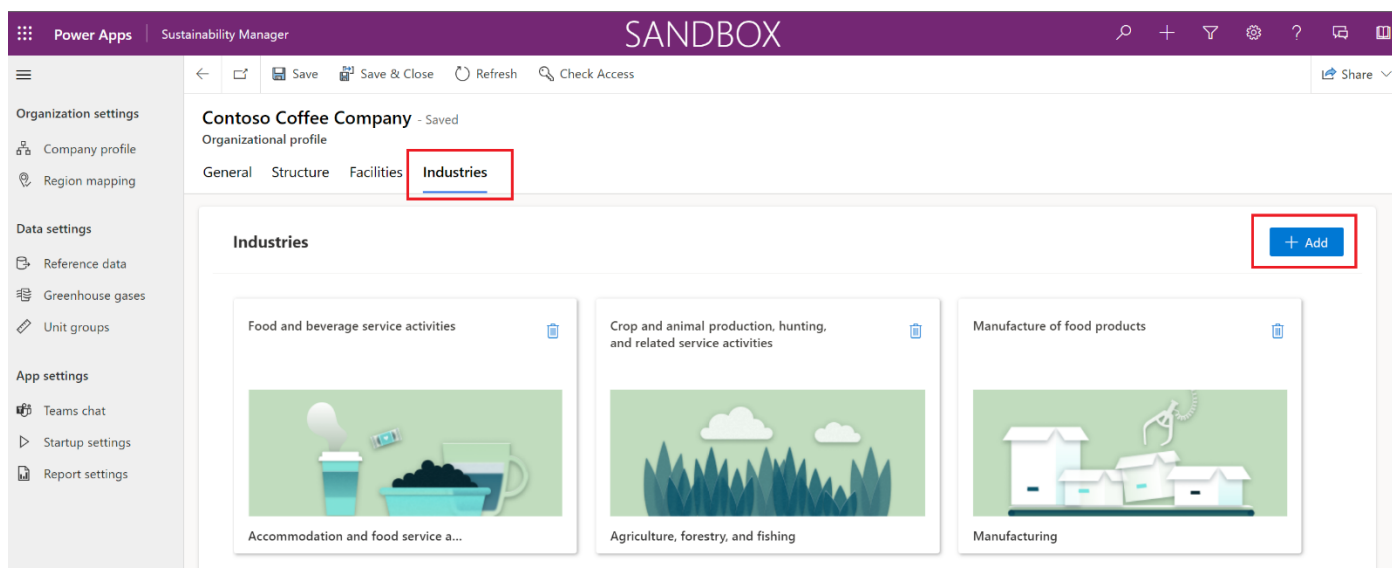
Basic Information

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

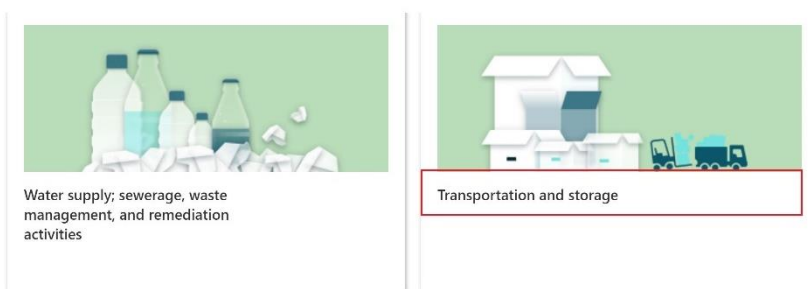
Annual reporting period

Start day	* 1	Start month	* January
-----------	-----	-------------	-----------

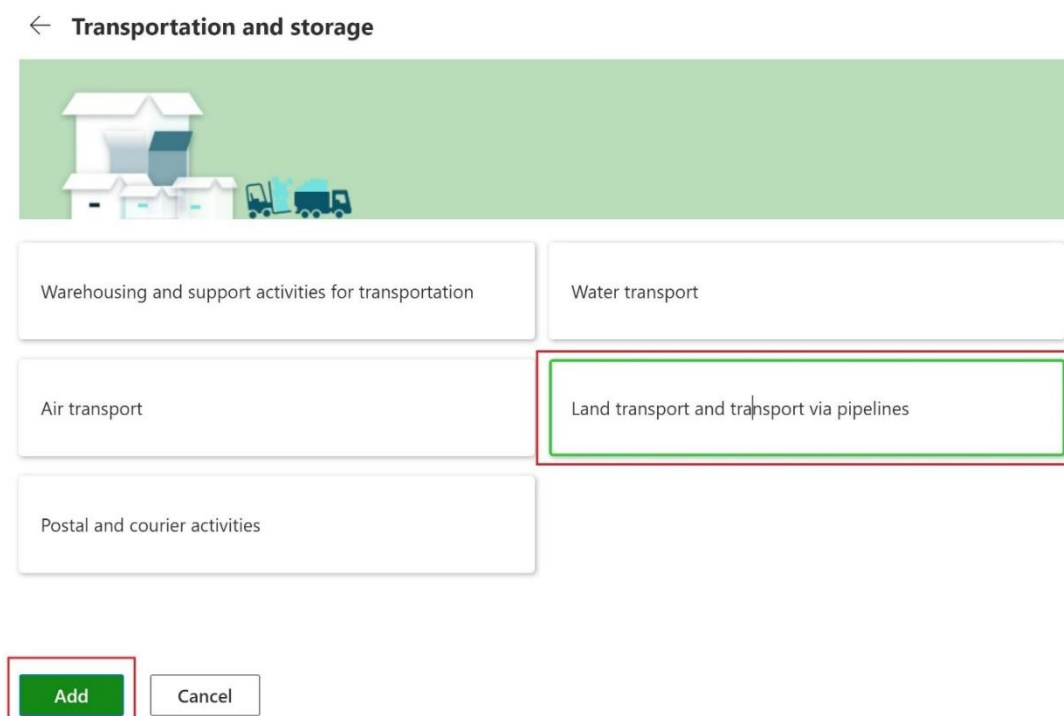
4. On the **Company profile** page, Click on the **Industries** Tab. Microsoft Sustainability Manager includes a selection of pre-defined industries and sub-verticals based on NACE standards, [NACE Code](#). Click **+Add**



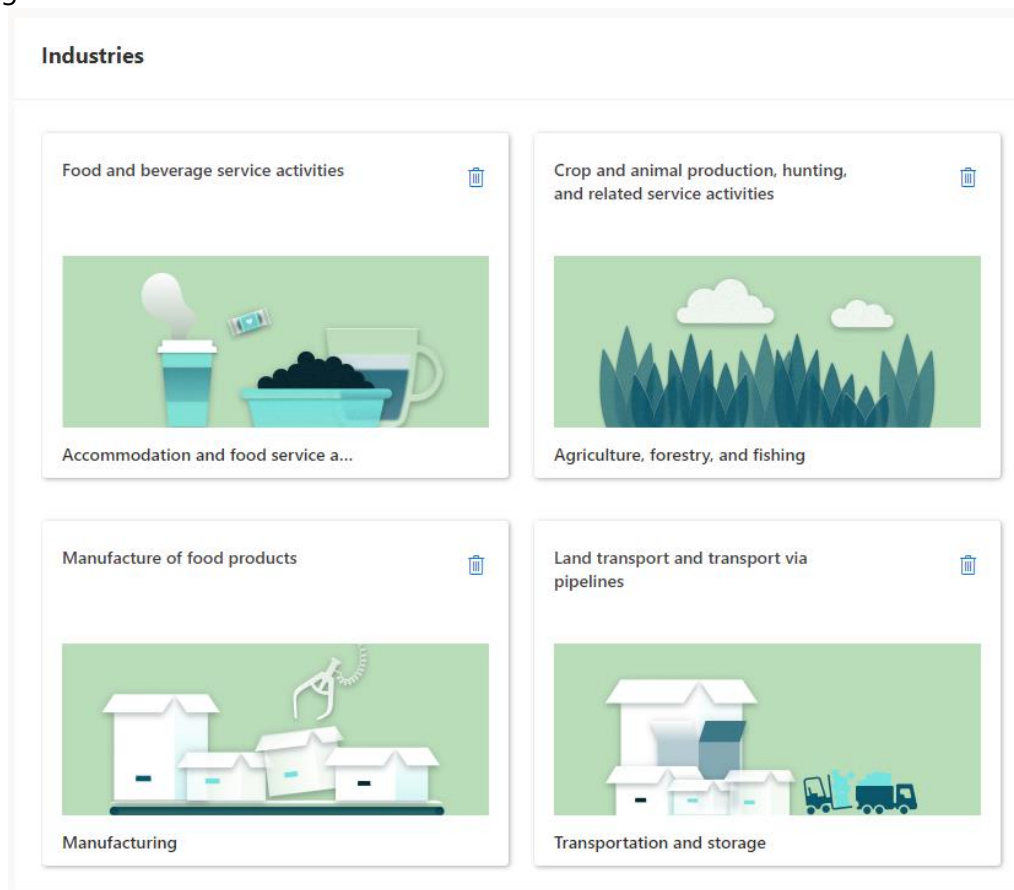
5. In the **Industries** section select **Transportation and storage**



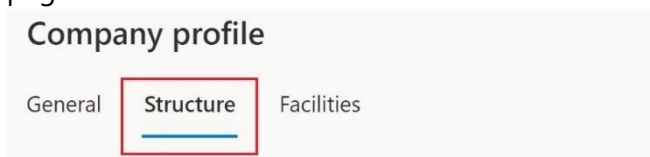
6. In the next screen select **“Land transport and transport via pipelines”** and select **“Add”**



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.

Company profile

General **Structure** Facilities

+ Add Edit Remove View goals

Organizational hierarchy as of 8/8/2022

← ↻ Save Save & Close + New Flow

New Organizational unit

General Monthly revenue

Name *	---	Address line 1	
Description	---	Address line 2	---
Organizational unit type *	---	Address: City	---
Latitude	---	County	---
Longitude	---	ZIP/Postal code	---
Connection	---	State/Province	---

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

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

The screenshot shows the 'Wide World Importers' organizational unit form. At the top, there is a toolbar with buttons: '<', '>', 'Save', 'Save & Close', '+ New', and 'Deactivate'. Below the toolbar, the title 'Wide World Importers - Saved' is displayed, followed by 'Organizational unit'. There are three tabs: 'General' (selected), 'Monthly revenue', and 'Related'. The 'General' tab contains three fields: 'Name' with the value 'Wide World Importers', 'Description' with the value '---', and 'Organizational unit type' with the value 'Department'. The 'Name' and 'Organizational unit type' fields are highlighted with red boxes.

11. In your new Wide World Importers Organization Unit, scroll down to the Organizational hierarchies section, which should have appeared after you saved the organization unit, click + **New Organizational hierarchy**

The screenshot shows the 'Organizational hierarchies (Organizational unit)' section. It features a search bar 'Search this view' and several filter buttons: 'Organizat...', 'Parent ↑', 'Effective ...', 'Effective ...', 'Connection', and 'Origin'. The main area displays 'No data available'. At the bottom, it shows '0 - 0 of 0' and 'Page 1'. A dropdown menu is open, showing options: '+ New Organizational hierarc...', 'Refresh', 'Flow', 'Run Report', 'Excel Templates', 'Export Organizational hiera...', and 'See associated records'. The '+ New Organizational hierarc...' option is highlighted with a red box.

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), ignore the different value on the screenshot.

The screenshot shows the 'New Organizational hierarchy - Unsaved' form. At the top, there is a toolbar with buttons: '<', '>', 'Save', 'Save & Close', '+ New', and 'Flow'. Below the toolbar, the title 'New Organizational hierarchy - Unsaved' is displayed. There are two tabs: 'General' (selected) and another tab. The 'General' tab contains two sections. The left section has three fields: 'Organizational unit' with the value 'Wide World Importers', 'Parent' with the value 'Contoso USA', and 'Connection' with the value '---'. The 'Parent' field is highlighted with a red box. The right section has three fields: 'Effective start date' with the value '8/1/2022', 'Effective end date' with the value '---', and 'Origin correlation ID' with the value '---'. The 'Effective start date' field is highlighted with a red box.

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

Wide World Importers - Saved
Organizational unit

General Monthly revenue Related

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

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.

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

Company profile

General Structure **Facilities**

Add facility Manage connection

Search

Contoso Factory 11 Carob Tree Road, Stilson, Washington, USA	
Contoso Warehouse 12 Candlenut Tree Street, Houston, Texas, USA	

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.

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: 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.

New Facility - Unsaved

General

Name	* Wide World Importers - Miami Office
Latitude	25.7743200000
Longitude	-80.1877200000
🔒 Connection	---

Address line 1	* Brickell Avenue
Address line 2	---
City	* Miami
County	---
State/Province	Florida
ZIP/Postal code	* 33132
Country/Region	* United States of America ⌵
Origin correlation ID	---

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

New Facility - Unsaved

General

Name	* Wide World Importers - Tampa Office
Latitude	27.9448300000
Longitude	-82.5140500000
🔒 Connection	---

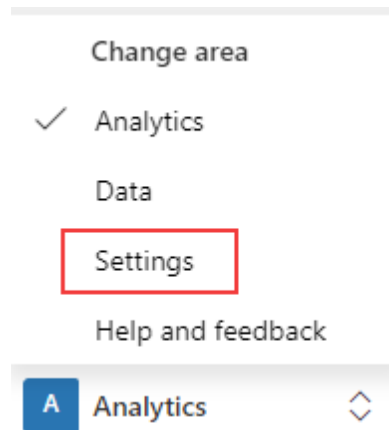
Address line 1	* Lois Avenue
Address line 2	---
City	* Tampa
County	---
State/Province	Florida
ZIP/Postal code	* 33609
Country/Region	* United States of America ⌵
Origin correlation ID	---

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.**

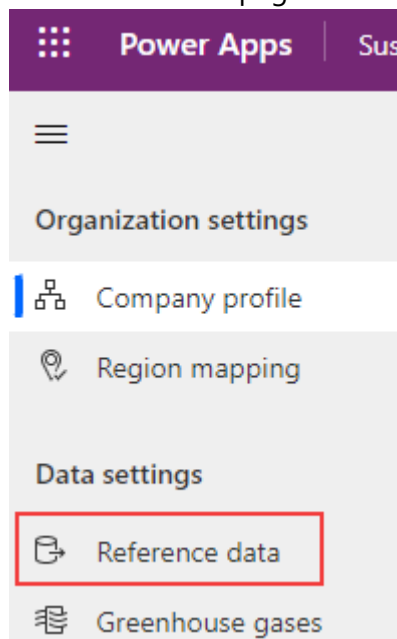
Task 2: Setup reference data

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.

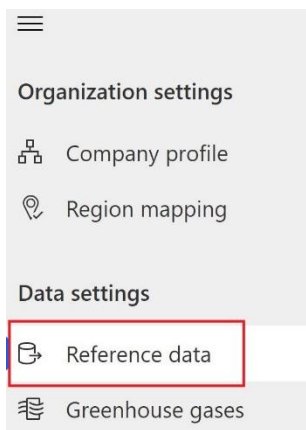
1. In the bottom left corner, change the Area to **Settings**



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



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



Reference data categories ▼

Connecting to reference data helps provide relevant, reliable emissions calculations. [Le](#)

Source	Data	Connections
Accommodation types	View	Manage
Business travel types	View	Manage
Contractual instrument types	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	
Green Republic Electricity Services Wind	6/21/2022 4:51 PM		Wind	
Green Republic Heating	6/21/2022 4:51 PM		Solar	
Utility Company Cooling	6/21/2022 4:51 PM		Other	

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

- a. **Name:** VanArsdel Ltd
b. **Energy source:** Nuclear

← Save **Save & Close** + New Flow

New Contractual instrument type - Unsaved

General

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

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

- a. **Name:** Adatum Corp
b. **Energy source:** Other

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.

← Save **Save & Close** + New Flow

New Contractual instrument type - Unsaved

General

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

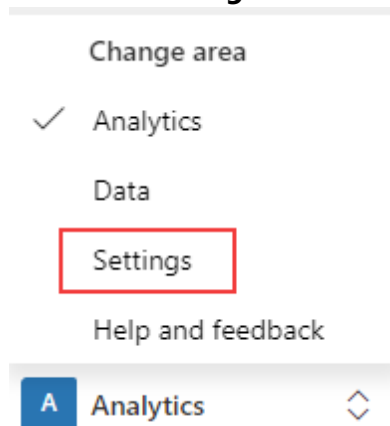
Great job, by completing these steps, you have added contractual instrument types. There are many types of reference data, take some time after this lab to explore the other reference data types, they will be used throughout Microsoft Cloud for Sustainability, and Microsoft Sustainability Manager. **Please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

Task 3: Setup Unit conversion factor

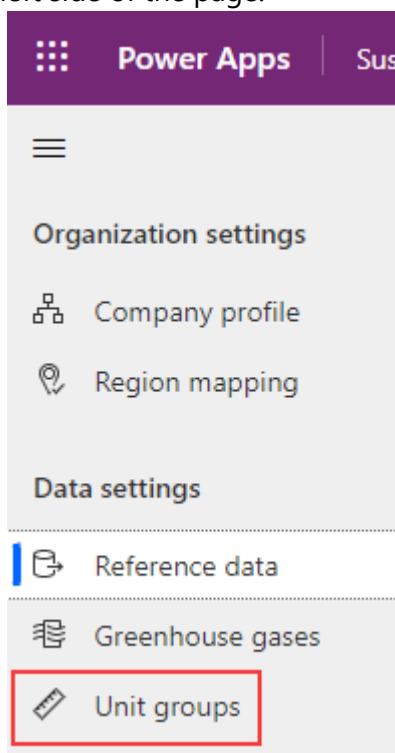
In this task, Reed sets up a unit conversion factor in Microsoft Sustainability Manager. While reviewing the inventory management plan, Alex identifies a missing unit of distance needed to calculate emissions for the fleet of electric vehicles. They ask Reed to add a new unit to the Length/Distance unit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

- Select **New unit** to create new

Length/distance - Saved
Unit group

General Related

Base unit: m
Reporting unit: m

+ New Unit Refresh

Name	Conversion factor	Is base unit	Base unit
ft	0.3048000000	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

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.