Microsoft Cloud for Sustainability *in a Day*

Lab: Reporting Year

Step-by-Step Lab

5 minutes

June 2023

Contents

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 an 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 <u>electric</u> trucks that will be used for transportation of finished goods across the USA.

Learning Objectives
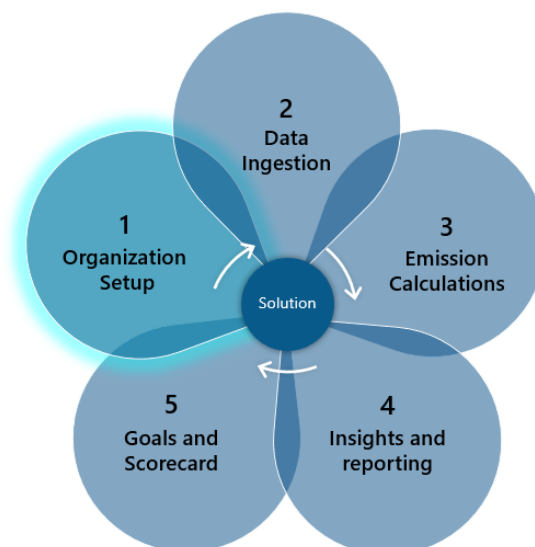
In this lab, you will perform the following:

- Start reporting by creating a reporting year

Prerequisites

- o Microsoft Sustainability manager environment is set up with sample data
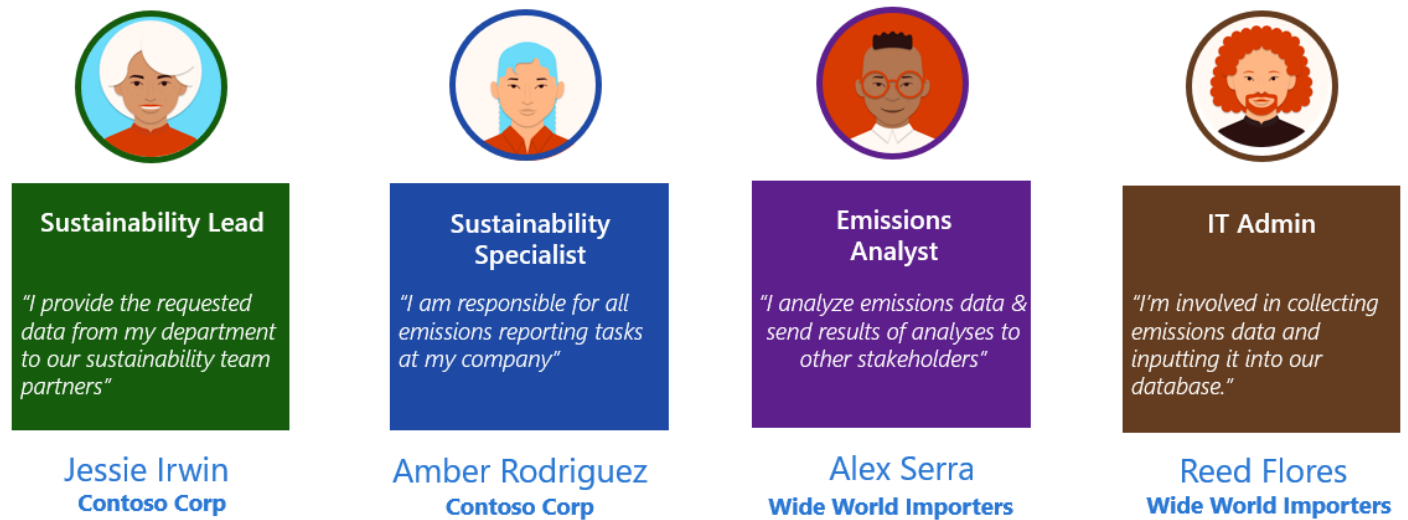
Solution Focus Area

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.
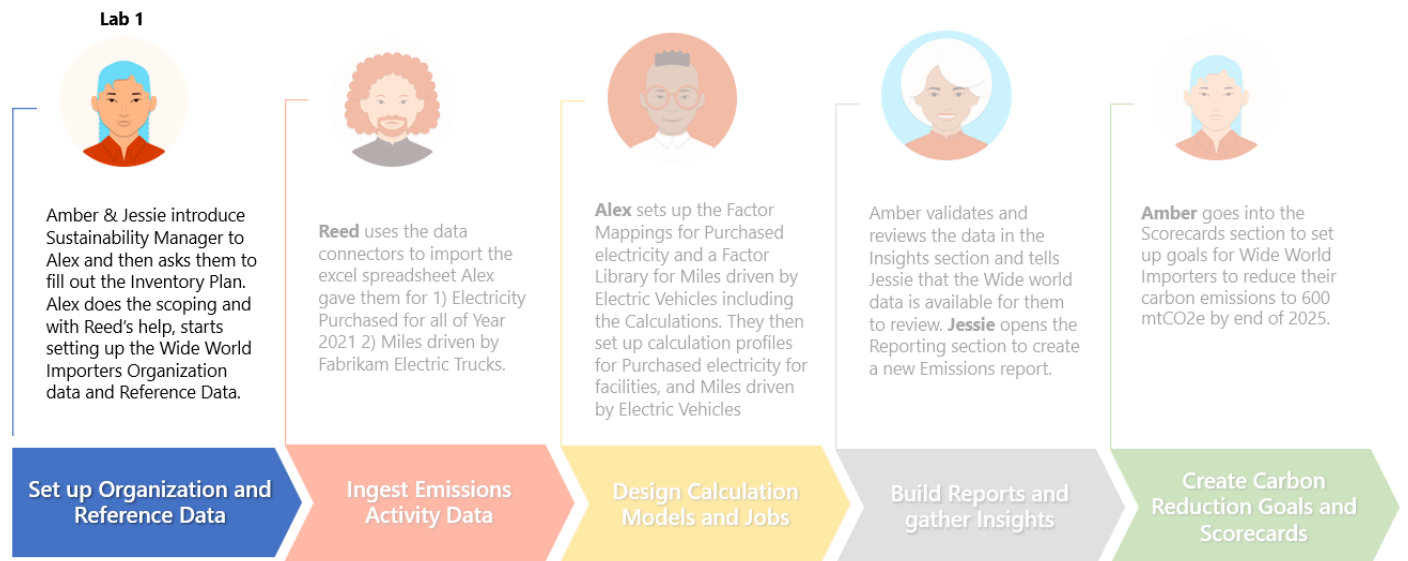

Personas and Scenarios

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.
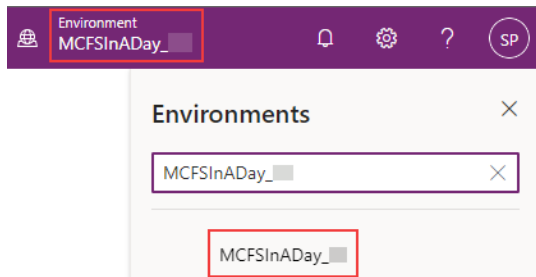

Sustainability Lead	Sustainability Specialist	Emissions Analyst	IT Admin
"I provide the requested data from my department to our sustainability team partners"	*"I am responsible for all emissions reporting tasks at my company"*	*"I analyze emissions data & send results of analyses to other stakeholders"*	*"I'm involved in collecting emissions data and inputting it into our database."*
Jessie Irwin **Contoso Corp**	**Amber Rodriguez** **Contoso Corp**	**Alex Serra** **Wide World Importers**	**Reed Flores** **Wide World Importers**

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

Lab 1

Amber & Jessie introduce Sustainability Manager to Alex and then asks them to fill out the Inventory Plan. Alex does the scoping and with Reed's help, starts setting up the Wide World Importers Organization data and Reference Data.

Reed uses the data connectors to import the excel spreadsheet Alex gave them for 1) Electricity Purchased for all of Year 2021 2) Miles driven by Fabrikam Electric Trucks.

Alex sets up the Factor Mappings for Purchased electricity and a Factor Library for Miles driven by Electric Vehicles including the Calculations. They then set up calculation profiles for Purchased electricity for facilities, and Miles driven by Electric Vehicles

Amber validates and reviews the data in the Insights section and tells Jessie that the Wide world data is available for them to review. Jessie opens the Reporting section to create a new Emissions report.

Amber goes into the Scorecards section to set up goals for Wide World Importers to reduce their carbon emissions to 600 mtCO2e by end of 2025.

Set up Organization and Reference Data → **Ingest Emissions Activity Data** → **Design Calculation Models and Jobs** → **Build Reports and gather Insights** → **Create Carbon Reduction Goals and Scorecards**
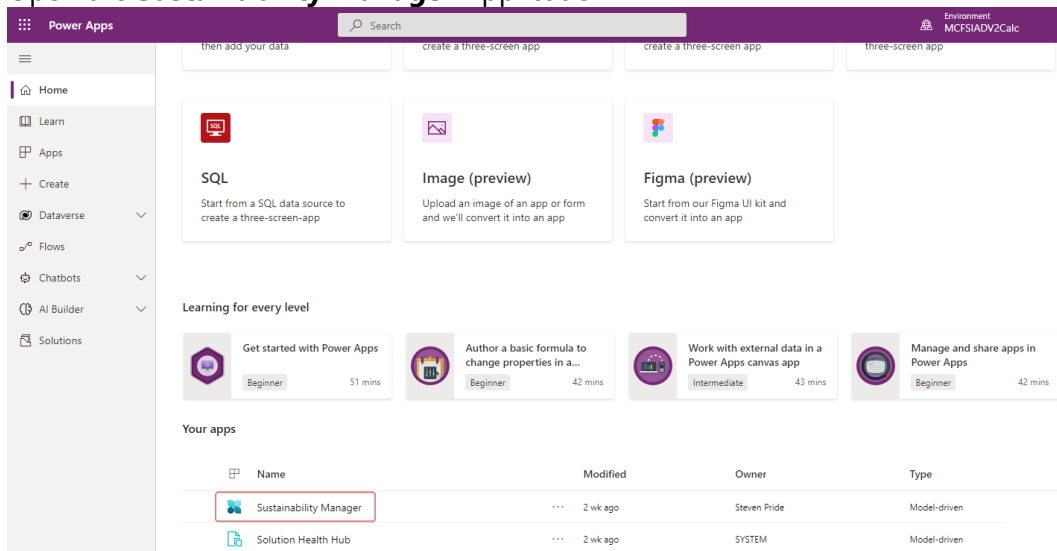
Exercise 1: Configure reporting years

In this exercise, you will learn about the steps that Amber and Jessie took to set up Contoso Corp company reporting years. You can explore this functionality in deeper detail on Microsoft Docs, please visit Configure reporting years.
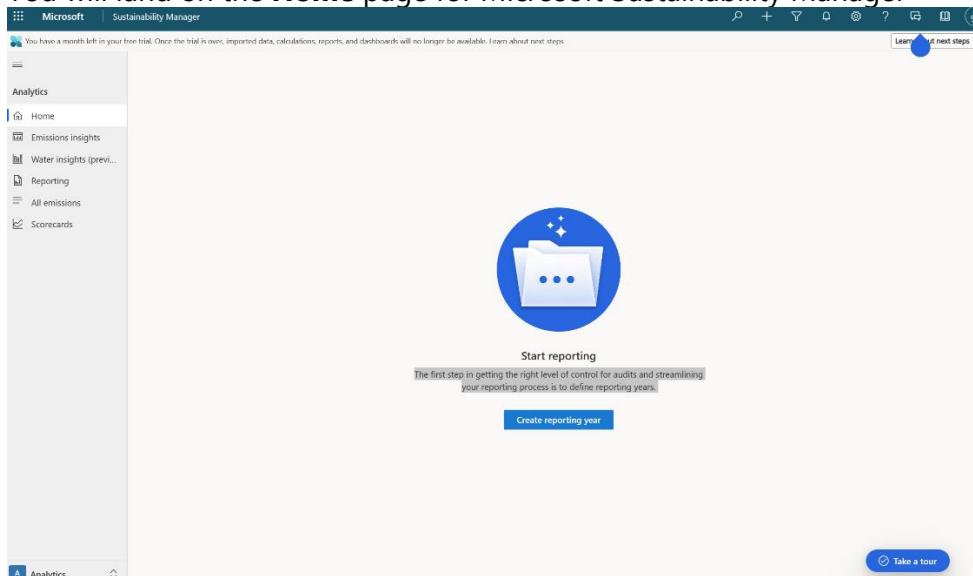
- o For our Instructor Lead Training, we suggest using In-private browsing, or a new browser profile.
- o For our Instructor Lead Training, log in to https://make.powerapps.com using the user account that has been assigned to you.
- o For our Instructor Lead Training, please use the environment selector to switch from the default environment to the other available environment, with either MCfS or Sustainability in its name.
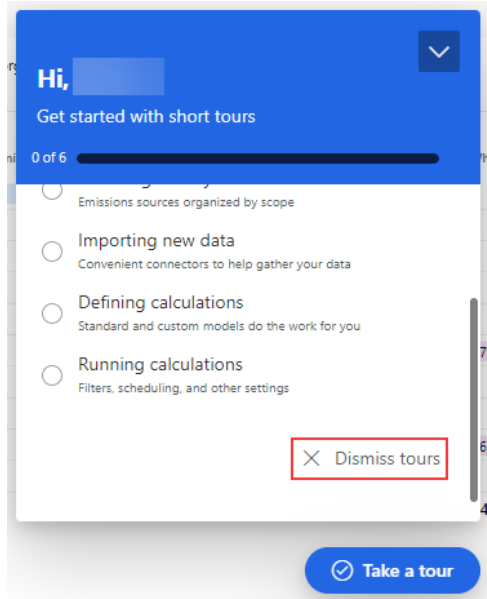

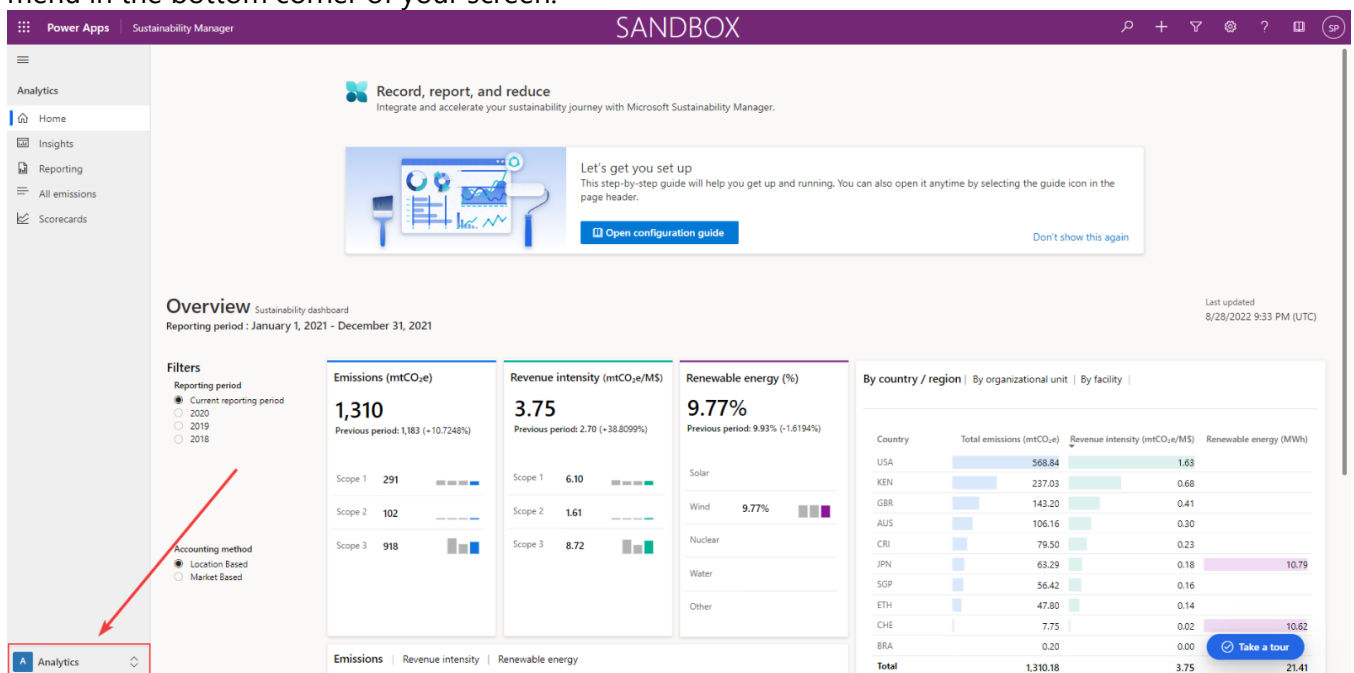- o Open the **Sustainability Manager** Application

- o You will land on the **Home** page for Microsoft Sustainability Manager
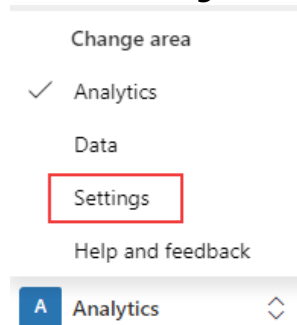
o Area navigation is a common first step in each lab and exercise. You can find the area navigation menu in the bottom corner of your screen.
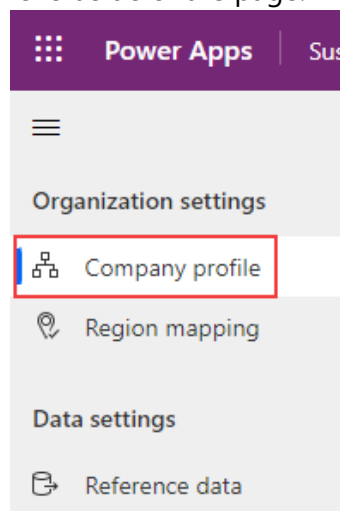
Task 1: Configure reporting years

In this task, Amber sets up the Company reporting years, for the Contoso Corp 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.
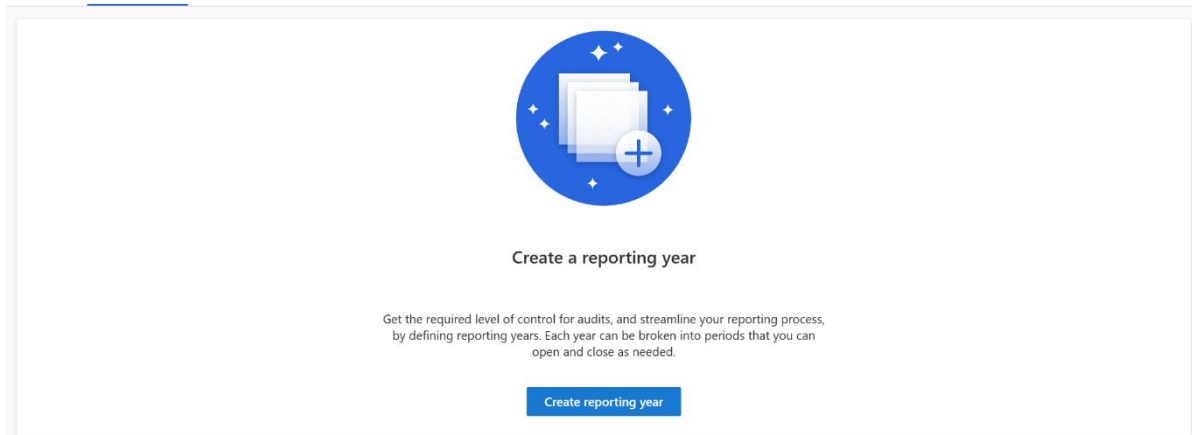

4. On the **Company profile** page, **Click** on **Reporting years** Tab.
    Click Create reporting year

Contoso Coffee Company - Saved
Organizational profile

General   **Reporting years**   Structure   Facilities   Industries

Create a reporting year

Get the required level of control for audits, and streamline your reporting process, by defining reporting years. Each year can be broken into periods that you can open and close as needed.

[Create reporting year]

5. When you **create a reporting year**, you name your reporting year, define the starting date, and apply a template to determine the number of periods to create. After you create it, the reporting year will be available for selection on the insight pages. Enter the following information:
   o In the **Name field**, enter the name of the reporting year. This name appears on insight pages in Microsoft Sustainability Manager. **Name**: FY 2022
   o In the **Start date field**, enter the first day of your reporting year**. Start Date**: Jan 1, 2022
   o In the **Year template field**, select either Annual, Semiannual, Quarter, Month, or 4-Week Period (13 per year). The Year template is used to create the periods from the start date. For example, selecting Month will create 12 monthly periods from the start date. Selecting Quarter will create four equal periods from the start date. **Year template**: Month

Click Save

New reporting year   ✕

Name *

[FY 2022]

Start date *

[1/1/2022   📅]

Year template *

[Annual   ⌄]

+ Create reporting year ⓘ		FY 2022			⚙ Manage reporting year ⌄
FY 2022	● Open	**Period**	**Start date**	**End date**	**Status**
		Period 1 ⋮	1/1/2022	12/31/2022	● Open ⌄

Congratulations! By completing these steps, you have completed the reporting year configuration setup. Reporting years provide enhanced capabilities to support tighter control of data to better support internal and external audits. The home page and insight pages allow you to select one-to-many reporting years. Data will display in the visuals following the period definition of Month, Quarter, Semiannual, Annual, 4-Week, or a custom defined template.