



Microsoft Cloud for Sustainability **in a** **Day**

Lab 01: Organization Setup

Step-by-Step Lab

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:

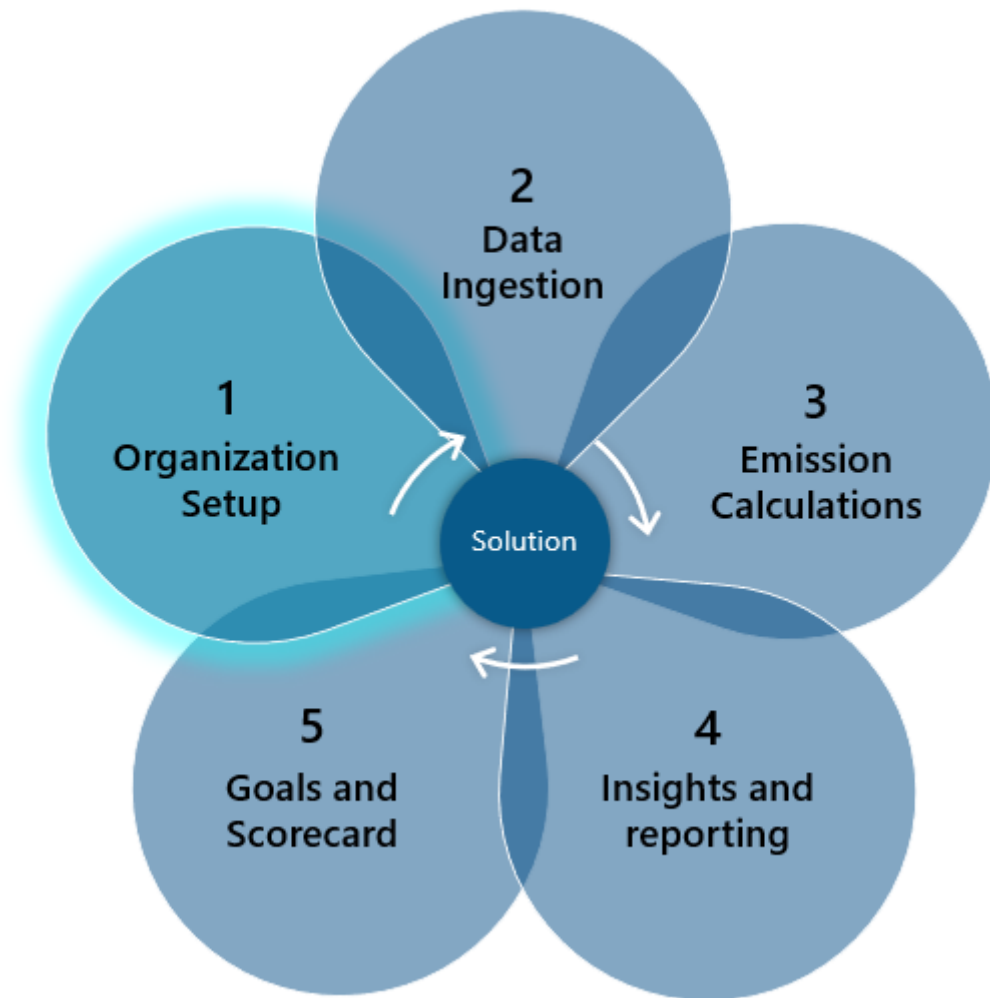
- Review the company profile for Contoso Corp, add Wide World Importers to the organizational structure, and add the two Florida facilities
- Create reference data for contractual types
- Create units with conversion factor
- The newly created data during this lab exercise will form the foundation for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



Sustainability Lead

"I provide the requested data from my department to our sustainability team partners"

Jessie Irwin
Contoso Corp



Sustainability Specialist

"I am responsible for all emissions reporting tasks at my company"

Amber Rodriguez
Contoso Corp



Emissions Analyst

"I analyze emissions data & send results of analyses to other stakeholders"

Alex Serra
Wide World Importers



IT Admin

"I'm involved in collecting emissions data and inputting it into our database."

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

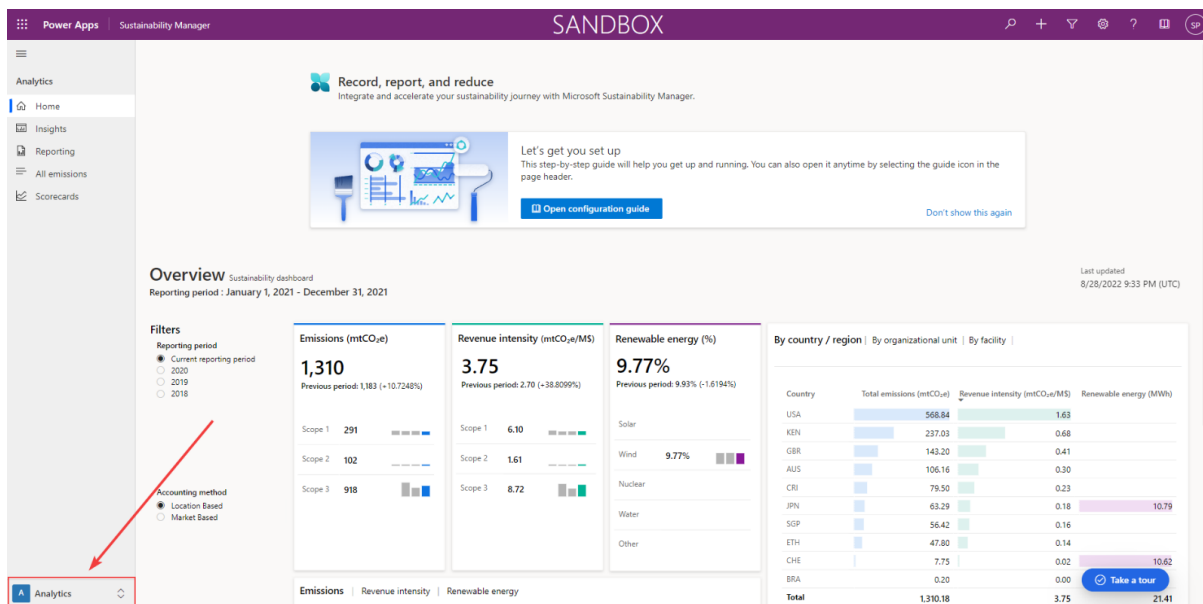
Design Calculation Models and Jobs

Build Reports and gather Insights

Create Carbon Reduction Goals and Scorecards

Exercise 1: Set up company profile and reference data

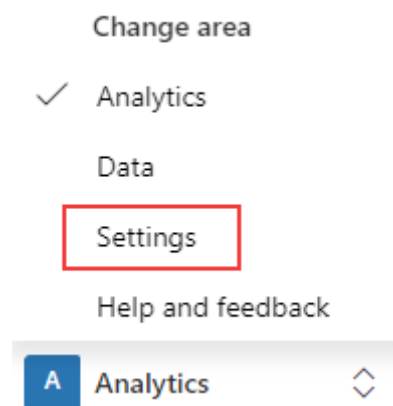
In this exercise, you will learn about the steps that Alex and Reed take to set up Wide World Imports company profile, organizational data, and reference data. You can explore this functionality in deeper detail on Microsoft Docs, please visit [Set up a company profile](#).



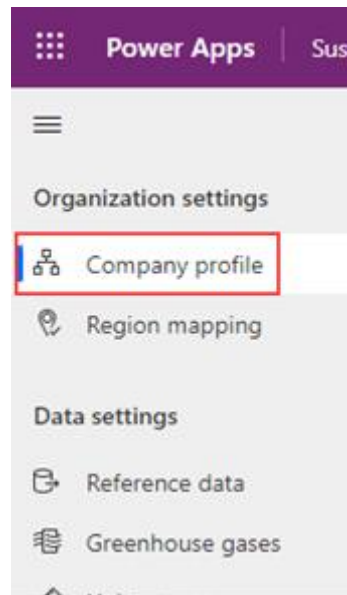
Task 1: Setup the Company profile, hierarchy, and facilities

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

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

←

↗

Save

Save & Close

Refresh

Check Access

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

*

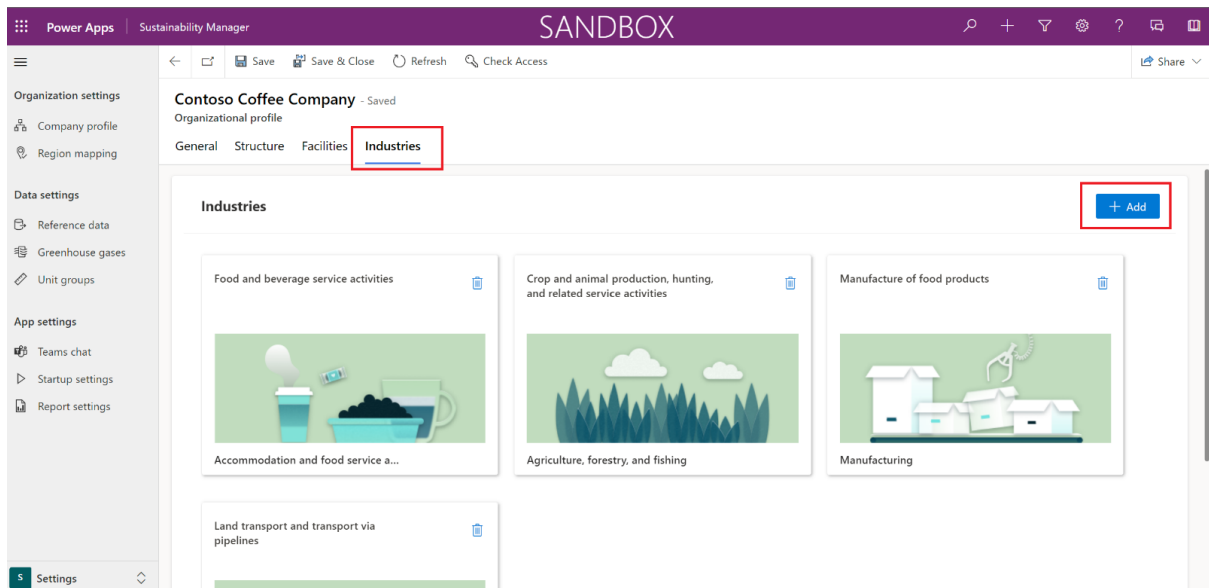
Alhambra

Country/Region

*

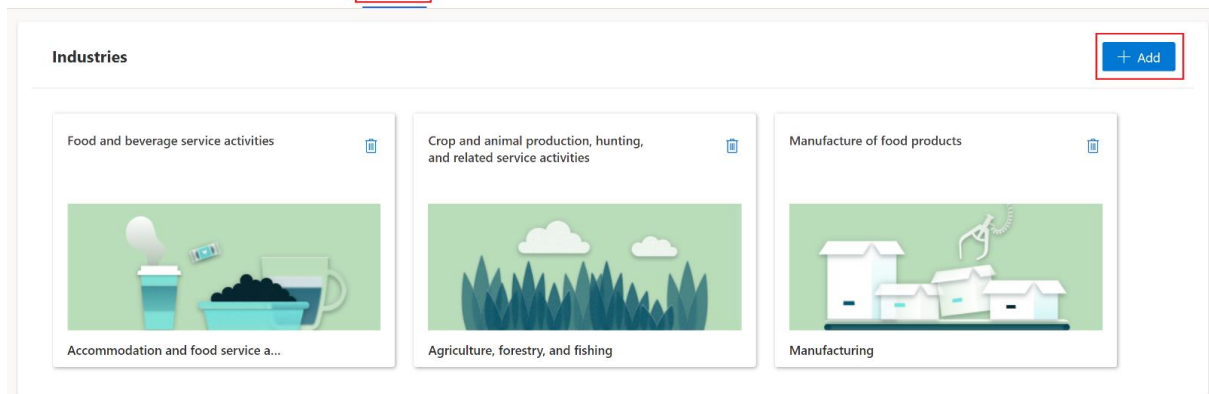
United States of America

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**



Contoso Coffee Company - Saved
Organizational profile

General Reporting years Structure Facilities **Industries**




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



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

← **Transportation and storage**







| | |
|---|---|
| Warehousing and support activities for transportation | Water transport |
| Air transport | Land transport and transport via pipelines |
| Postal and courier activities | |

| | |
|------------|--------|
| Add | Cancel |
|------------|--------|

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

Industries

| | |
|--|---|
| <p>Food and beverage service activities</p>  <p>Accommodation and food service a...</p> | <p>Crop and animal production, hunting, and related service activities</p>  <p>Agriculture, forestry, and fishing</p> |
| <p>Manufacture of food products</p>  <p>Manufacturing</p> | <p>Land transport and transport via pipelines</p>  <p>Transportation and storage</p> |

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

Company profile

General **Structure** Facilities

+ Add  Edit  Remove  View goals

Organizational hierarchy as of

8/8/2022

Organizational unit

- ▼ Contoso Corp
 - ▼ Contoso USA**
 - > Contoso New York

Contoso Coffee Company - Saved

Organizational profile

General Reporting years **Structure** Facilities Industries

 Add  Edit  Remove  View goals

Organizational hierarchy as of

Organizational unit

✓ Contoso Corp

> Contoso Africa

> Contoso Ag

> Contoso APAC

> Contoso EUR

> Contoso Pod Business

✓ Contoso USA

> Contoso New York

> Wide World Importers

9. Select **Contoso USA** and select **Add** to add a new organizational unit under it.

← ↗ Save Save & Close + New Flow ▾

New Organizational unit

General Monthly revenue

| | | | |
|----------------------------|-----|-----------------------|-------------------------|
| Name * | --- | Address line 1 | <input type="text"/> |
| Description | --- | Address line 2 | --- |
| Organizational unit type * | --- | Address: City | --- |
| Latitude | --- | County | --- |
| Longitude | --- | ZIP/Postal code | --- |
| 🔒 Connection | --- | State/Province | --- |
| | | Country/Region | Select country/region ▾ |
| | | Origin correlation ID | --- |

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

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

← ↗ Save Save & Close + New Deactivate

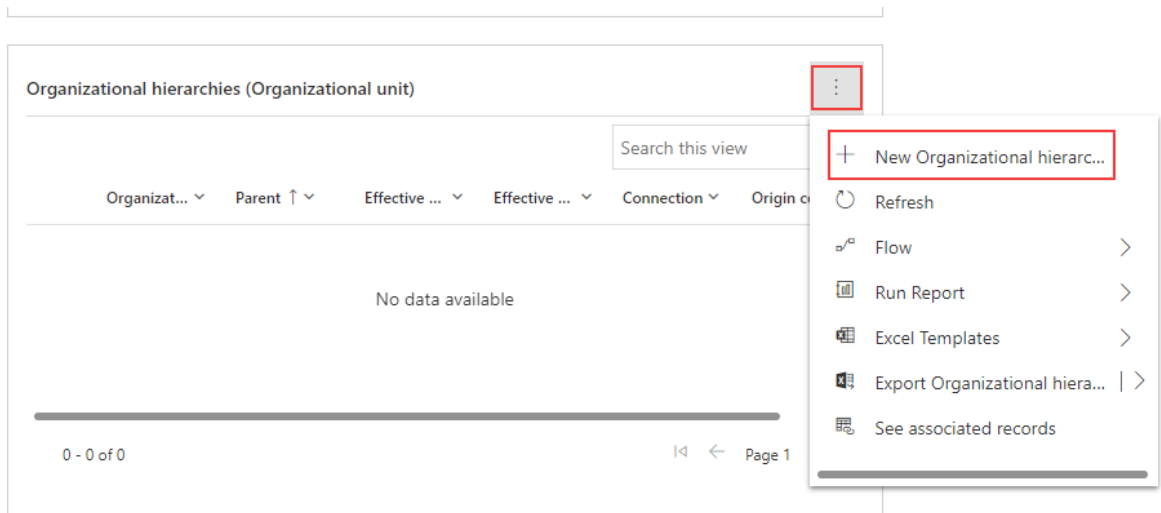
Wide World Importers - Saved

Organizational unit

General Monthly revenue Related

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

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



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**

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**

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.

Company profile

General Structure **Facilities**

Add facility
 Manage connection

Search

Contoso Factory

11 Carob Tree Road, Stilson, Washington, USA


Contoso Warehouse



12 Candlerut Tree Street, Houston, Texas, USA


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

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.

- **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.

← □ Save Save & Close + New ⌵ Flow ▾

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**

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.

- **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

← Save Save & Close + New Flow

New Facility - Unsaved

General

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

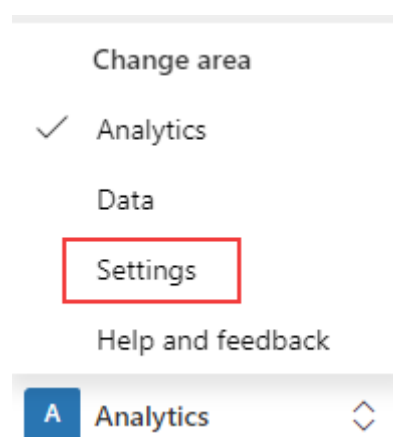
| | |
|-----------------------|--------------------------|
| Address line 1 * | Lois Avenue |
| Address line 2 | --- |
| City * | Tampa |
| County | --- |
| State/Province | Florida |
| ZIP/Postal code * | 33609 |
| Country/Region * | United States of America |
| Origin correlation ID | --- |

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.**

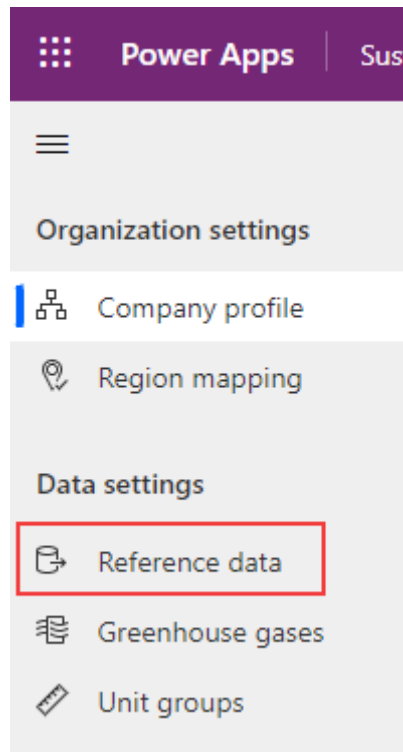
Task 2: Setup reference data

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**

Organization settings

Company profile

Region mapping

Data settings

Reference data

Greenhouse gases

Unit groups

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 |
| 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 | | | |
| 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 | | | |
| Utility Company Grid Energy | 6/21/2022 4:51 PM | | Other | | | |
| Utility Company Heating | 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.

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.

a.

VanArsdel Ltd

Name:

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 | --- |
| Connection | --- | | |

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.

a. **Name:** Adatum Corp

b. **Energy source:** Other

← □ Save **Save & Close** + New ⌵ Flow ▾

New Contractual instrument type - Unsaved

General

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

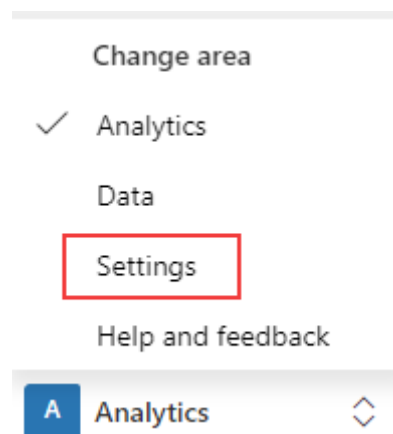
Great job, by completing these steps, you have added contractual instrument types. There are many types of reference data, take some time after this lab to explore the other reference data types, they will be used throughout Microsoft Cloud for Sustainability, and Microsoft Sustainability Manager. **Please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

Task 3: Setup Unit conversion factor

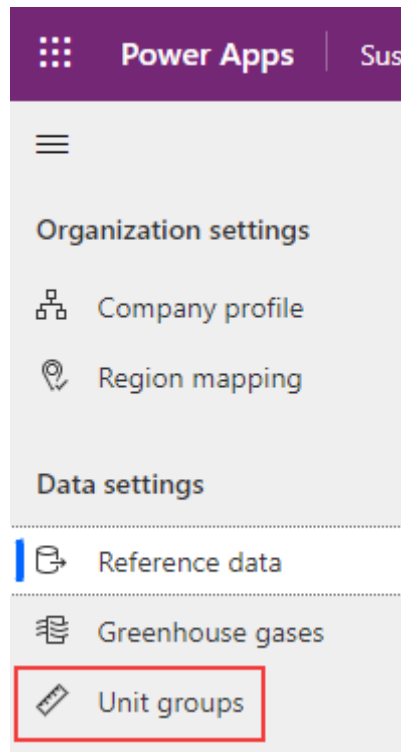
In this task, Reed sets up a unit conversion factor in Microsoft Sustainability Manager. While reviewing the inventory management plan, Alex identifies a missing unit of distance needed to calculate emissions for the fleet of electric vehicles. They ask Reed to add a new unit to the Length/Distance unit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



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

| Active unit groups | | | |
|--------------------|------------|----------------|--|
| 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 | |


| Active unit groups | | | |
|---------------------------|-----------------------------------|----------------|--|
| Name | Base unit | Reporting unit | |
| (Preview) Water intensity | Cubic metres per sq. ft. per year | | |
| Area | sq m | | |
| Asset | Count | | |
| Aviation | LTO | | |
| Concentration | mg/L | | |
| Currency | USD 2018 | | |
| Energy | J | MWh | |
| Length/distance | m | m | |
| Occupancy | Passenger | | |
| Stay duration | Night stay | | |
| Volume | L | L | |
| Weight/mass | kg | mtCO2e | |


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

← | 📄 | 📁 | Save | Save & Close | New | Deactivate | Delete | Refresh | Check Access | Assign | Share

Length/distance - Saved
Unit group

General | Related

Base unit  m

Reporting unit  m

+ New Unit | Refresh | ⋮

| <input type="radio"/> Name ↑ | Conversion factor | Is base unit | Base unit |
|------------------------------|-------------------|--------------|-----------|
| <input type="radio"/> ft | 0.3048000000 | No | m |

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



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

- a. **Name:** 100 mile
- b. **Conversion factor:** 160934.40

← | 📄 | Save | **Save & Close** | + New | Flow | ▾

New Unit - Unsaved

General

| | | |
|-------------------|---|---|
| Name | * | <u>100 mile</u> |
| Conversion factor | * | 160,934.4000000000 |
| Base unit | * |  m |
| Is base unit | * | No |
| Unit group | * |  Length/distance |

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.