IFS Cloud Emissions Tracker

Configuration Guide

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1. Configuration Guide

1.1 Introduction

Note: Ensure you've followed the IFS Cloud Emissions Tracker Installation Guide prior to beginning the Configuration Process.

This guide is designed to provide you with comprehensive instructions on how to configure and customize Emissions Tracker Application to meet your specific needs and preferences.

To help you navigate through the configuration process efficiently, this guide is organized into sections each focusing on a specific aspect of configuration. You can follow the steps sequentially or jump directly to the sections that address your immediate needs.

Before you begin configuring Emissions Tracker Application, make sure you have the necessary access rights and permissions.

Prerequisites for configuring IFS Cloud Emissions Tracker

- Admin Access to PowerApps
- Climatiq API Key (Climatiq - API for Carbon Footprint Calculations) – will be provided by IFS.
- For IFS Cloud customers - This is necessary if you plan to use the IFS Organization Import Utility or the IFS Cloud Integration feature.
- Azure Key Vault Data Administrator (For IFS Cloud Customers) – this will be needed if you are planning to use IFS Organization Import Utility (optional)

1.2 Prepare your IFS Organization Access Tokens

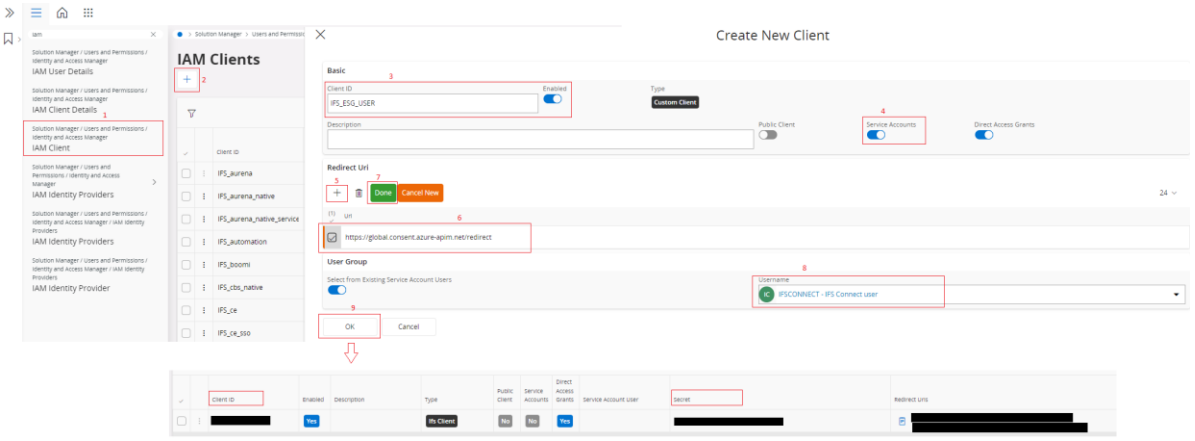
Note: This is an optional feature. If you want to configure this. you need to be a IFS Cloud customer.

Persona: IFS Cloud Customer

The IFS Cloud Organization Setup Connector facilitates the direct importation of your company details from IFS Cloud. This is a one-time configuration that expedites the organization setup within the application. It's important to note that this feature is accessible exclusively to **IFS Cloud customers**, and is mandatory to configure this if you are planning to use IFS Organization setup connector features.

1.2.1 Creating IAM Client Account

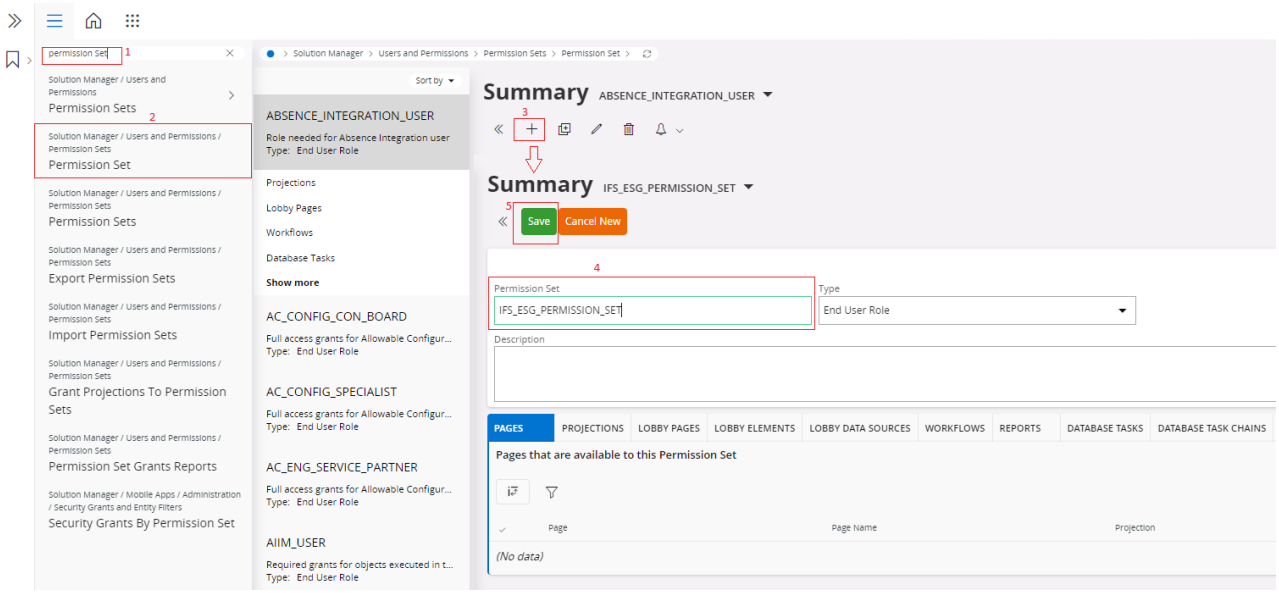
1. Login to IFS Cloud and Go to **IAM Client** Page.
2. Add a new IAM Client.
3. Fill the Client ID with a suitable name (Example: IFS_ESG_USER) and turn on the **Enable** Toggle.
4. Turn on the service Accounts toggle On. (This will enable select from existing service Account Users on)
5. Add new Redirect URL as https://global.consent.azure-apim.net/redirect
6. For username, select the username where you want to give access.
7. Click on OK and see if your newly created record is visible in the grid.



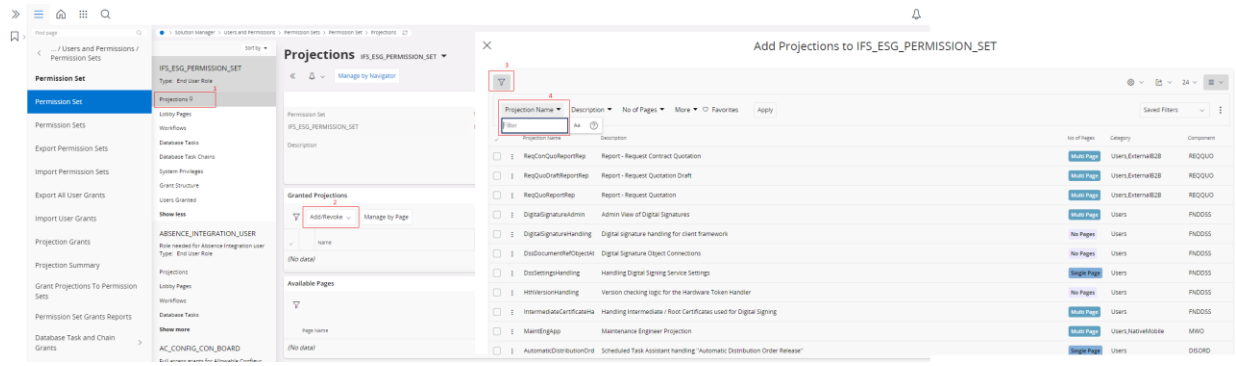
Note: You will need this newly created **Client ID and Secret** in Next Step. Section 1.5

1.2.2 Adding Permission Set to the User

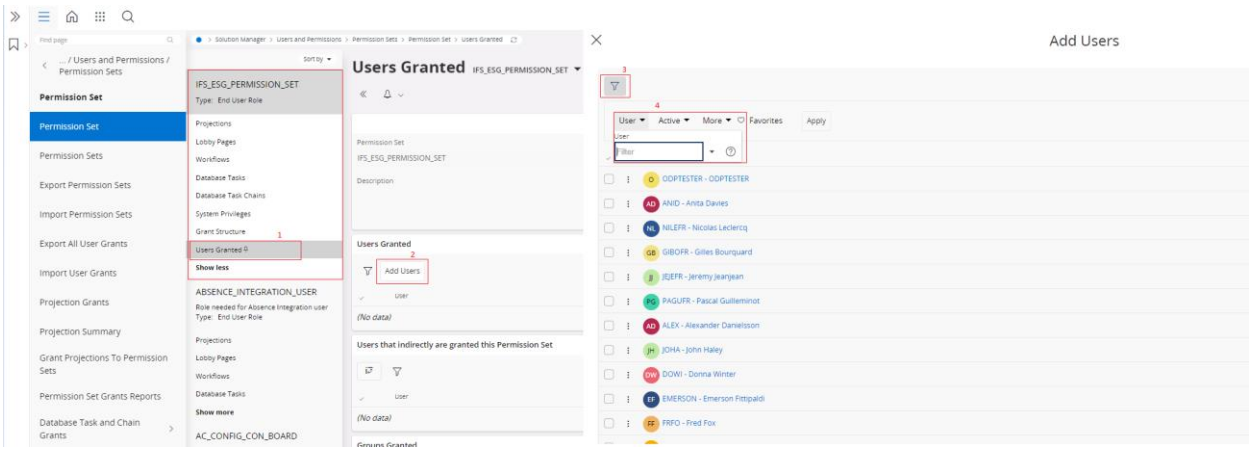
1. Search **Permission Set** in the left Navigation search space. Select Permission Set
2. Select on new Permission Set.
3. Add a Name for the Permission Set (Example: IFS_ESG_PERMISSION_SET)
4. You can leave the remaining selections as is, Click **Save**.



5. In the left navigation you can see the created Permission Set. Now let's map Projection to the IAM Client service Account User
6. Select the Projection and click on Add Projection.
7. From the panel you can filter the projection, select the checkbox, and hit ok button. You need to add below 5 projections.
    - CompanySiteHandling
    - CompaniesHandling
    - AccountingPeriodsHandling
    - SitesHandling
    - CompanyHandling



8. Next select "Users Granted" under the Permission set you have created.
9. Select Add Users and filter the user you have added under the IAM Client Account.


Users Granted
IFS_ESG_PERMISSION_SET
Add Users
Permission Set
Permission Sets
Export Permission Sets
Import Permission Sets
Export All User Grants
Import User Grants
Projection Grants
Projection Summary
Grant Projections To Permission Sets
Permission Set Grants Reports
Database Task and Chain Grants
Projections
Lobby Pages
Workflows
Database Tasks
Database Task Chains
System Privileges
Grant Structure
Users Granted
Show less
ABSENCE_INTEGRATION_USER
Show more
AC_CONFIG_CON_BOARD
Users that indirectly are granted this Permission Set
(No data)
Groups Granted
User
Active
More
Favorites
Apply
ODPTESTER - ODPTESTER
ANID - Anita Davies
NILEFR - Nicolas Leclercq
GIBOFR - Gilles Bourguard
JEJEFR - Jeremy Jeanjean
PAGUFR - Pascal Guilleminot
ALEX - Alexander Danielsson
JOHA - John Haley
DOWI - Donna Winter
EMERSON - Emerson Fittipaldi
FRFO - Fred Fox

Note: Before proceeding with step 1.3 for Azure Key Vault activation, it is mandatory to complete the following configurations.

- Prepare your IFS Organization Setup Connector – Step 1.2

1.3 Azure Key Vault and Create Secrets

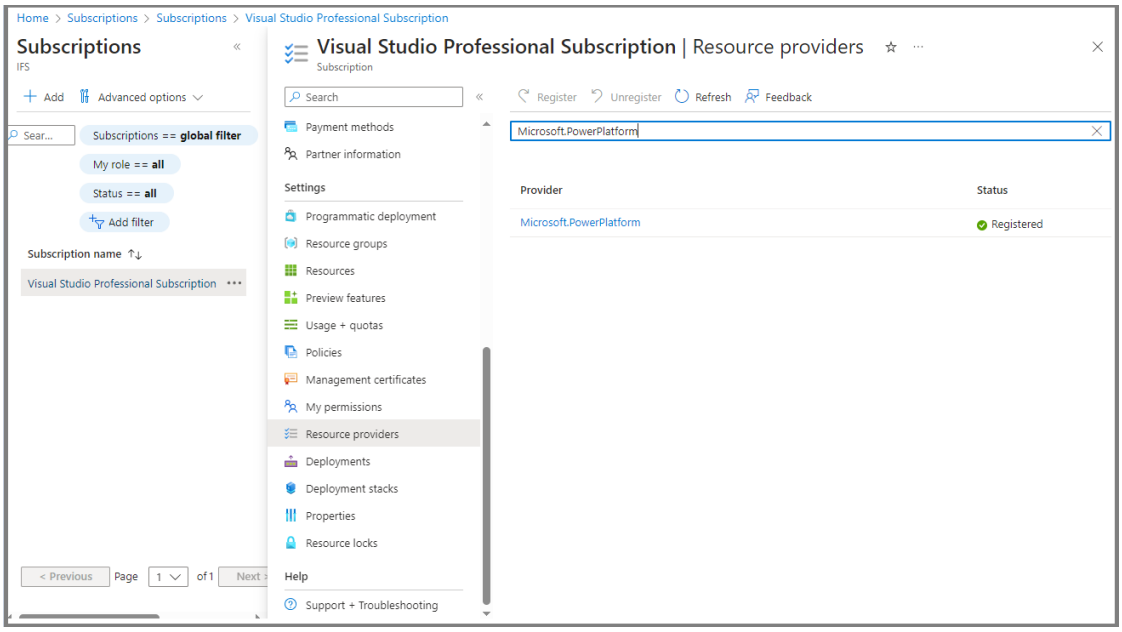
Note: This is an optional feature, you need to be an IFS Cloud customer for this.

Persona: Azure Key Vault Administrator

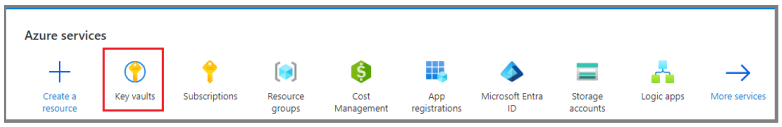
Refer to Microsoft Key Vault documentation for instructions on creating an Azure Key Vault.

1.3.1 Create Azure Key Vault

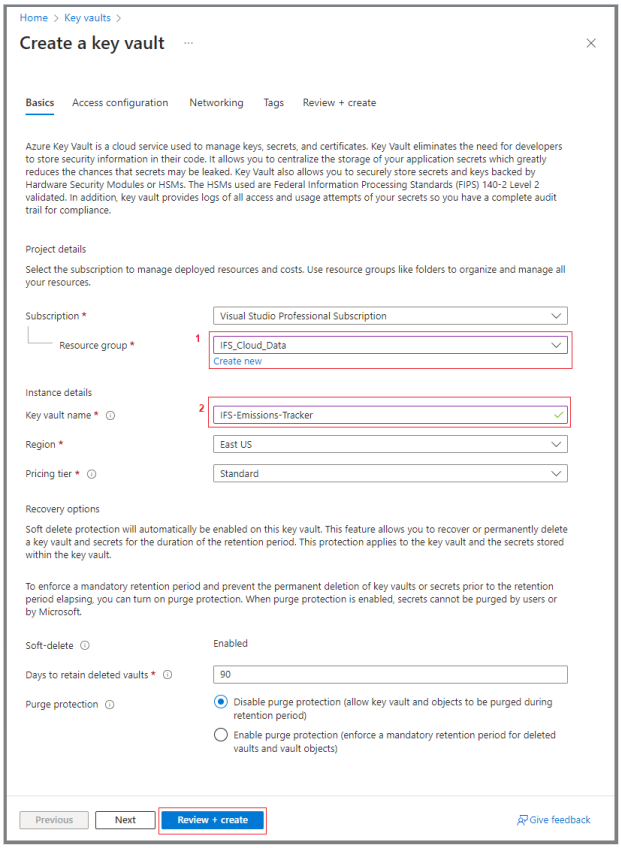
1. Navigate to portal.azure.com.
2. Register the Microsoft.PowerPlatform resource provider in your Azure subscription.
    - Go to your Azure subscription and locate the resource providers.
    - Verify if the Microsoft.PowerPlatform resource provider is registered; if not, proceed to register it.



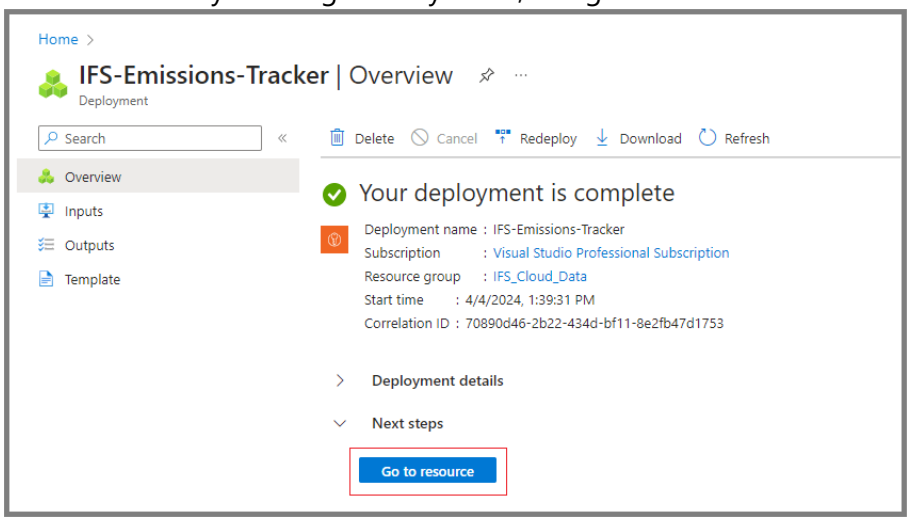
3. Create an Azure Key Vault.
    a. Locate the Key Vault in Azure and initiate the creation of a new Key Vault


Azure services
Create a resource
Key vaults
Subscriptions
Resource groups
Cost Management
App registrations
Microsoft Entra ID
Storage accounts
Logic apps
More services

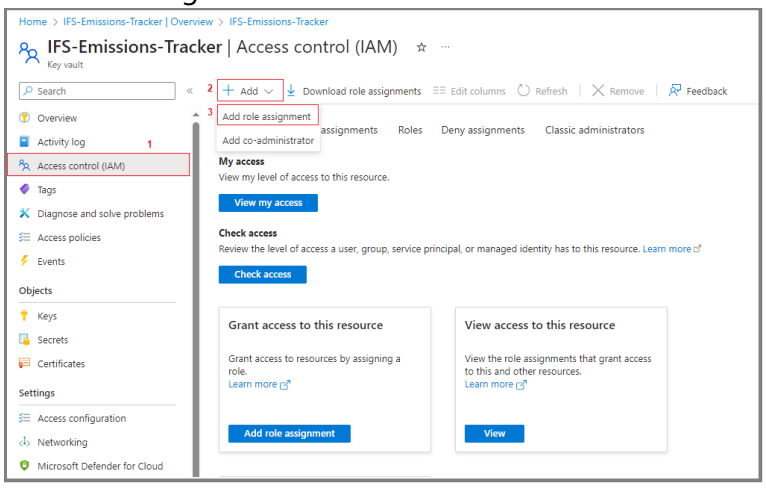
4. Choose "New Key Vault."
    i. Within the resource group section, choose "Create new" and assign a name for the resource group, for example, "IFS_Cloud_Data".
    ii. Enter a name for the Key Vault. Ex: IFS-Emissions-Tracker
    iii. Next, Select Review and Create button.



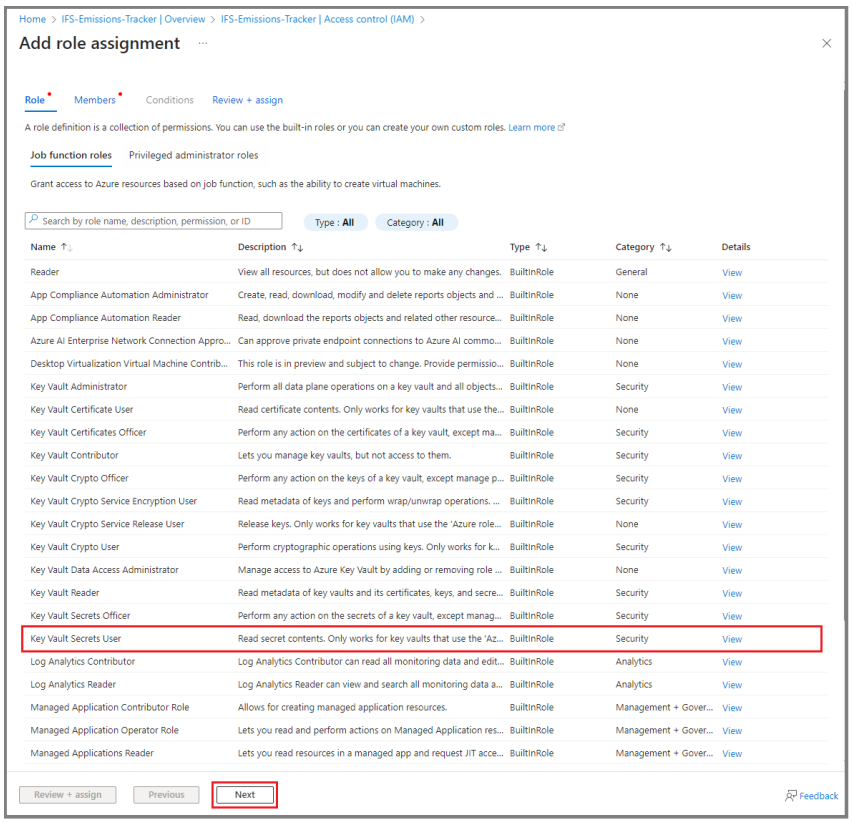
iv. After successfully creating the Key Vault, navigate to the resource.



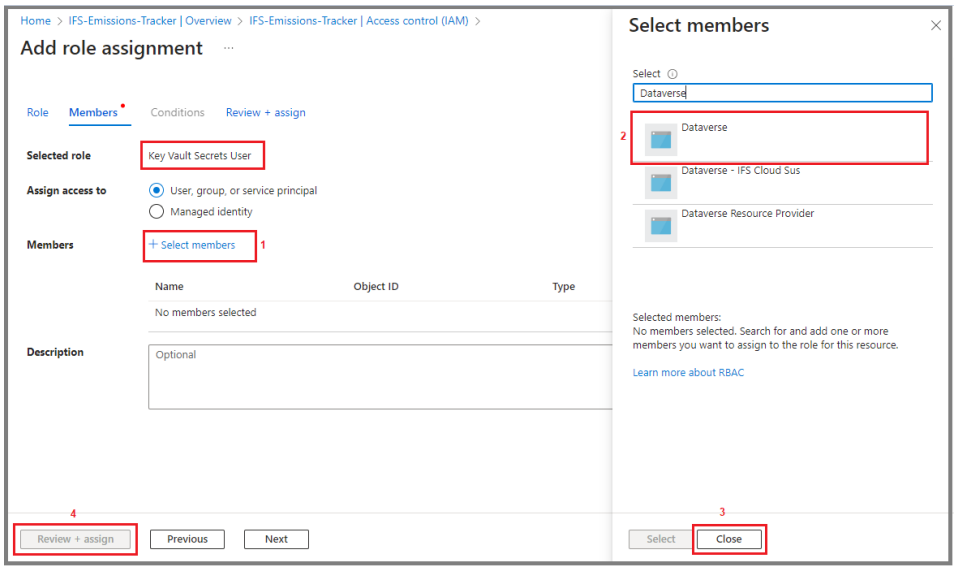
5. Go to the resource and choose Access Control from the navigation menu. Then, click on Add Role Assignment.



6. Choose the Key Vault Secret User.



7. Choose "Members" and include "Dataverse." Afterwards, select review and assign.



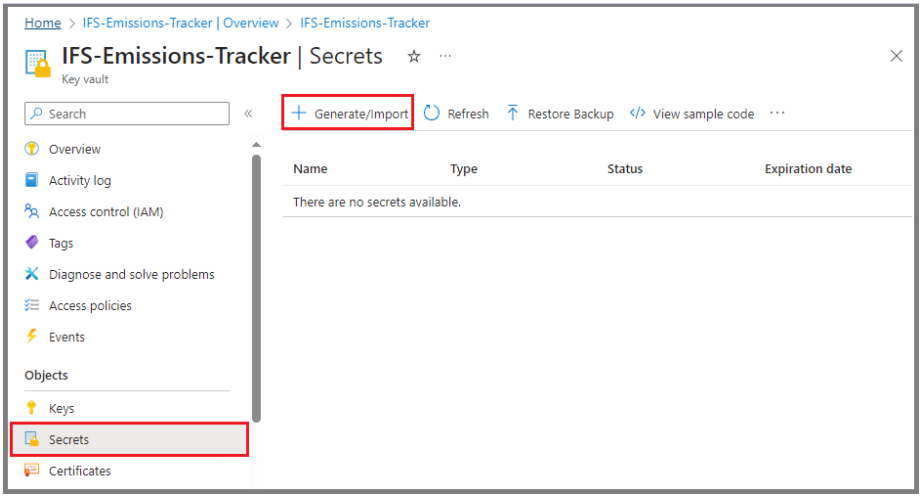
1.3.3 Create Secrets

You are required to generate two secrets.

Secret Name	Secret Value
IFS-Org-Client-ID	Section 1.2.1
IFS-Org-Client-Secret	Section 1.2.1

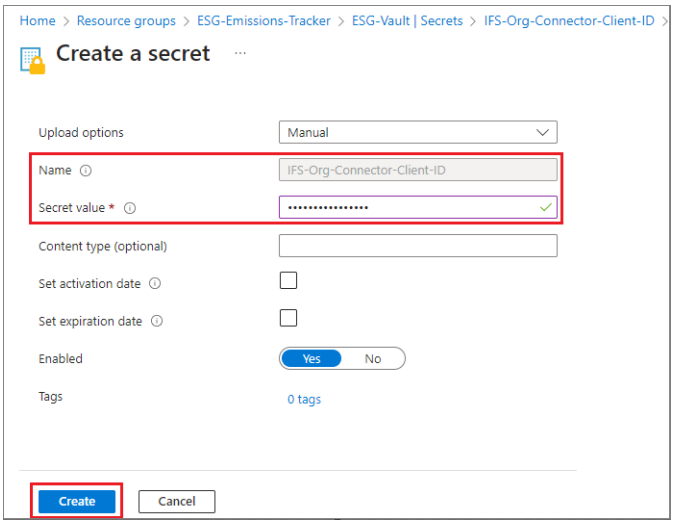
Table 1

1. Find the “Secrets” in Key Vault Navigation and select “Generate/Import.”

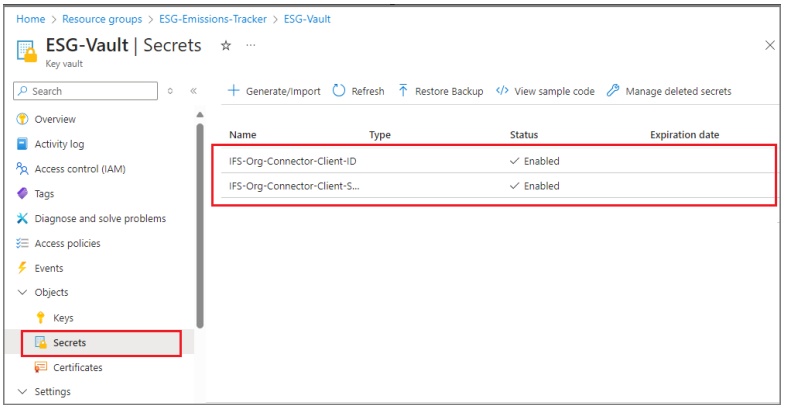


2. Add Name, Secret Value and hit Create.
   - Name: IFS-Org-Client-ID

- Secret: xxxxxxxxxxx (Created under Section 1.2.1)



3. Create all two (2) secrets given in Table 1.



1.4 Setting up OneDrive for Excel Upload

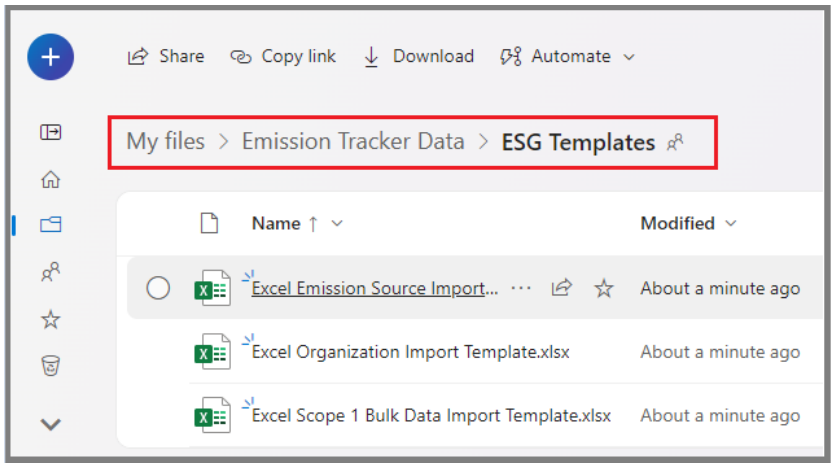
The IFS Cloud Emissions Tracker allows users to upload data through Excel files, which are then stored in OneDrive. To achieve this, follow the steps provided below to save your Excel files onto OneDrive. This feature is optional, you can avoid setting this up if you do not plan to use this.

Note: This is an optional feature, The Excel template needed will be provided by IFS.

1. Create Folder in your OneDrive.
2. Upload the Bulk Upload excel file into this folder. Optionally, you can organize them into separate folders, and currently, there is one template file available.
    i. Bulk Data Upload – (Upload Scope 1 & 2 Data)
3. You will need this Excel path in future steps, so make sure to keep note of this.

    Note: How to read excel paths.
    My files will be your Root folder. You can define Root folder with forward slash (/).

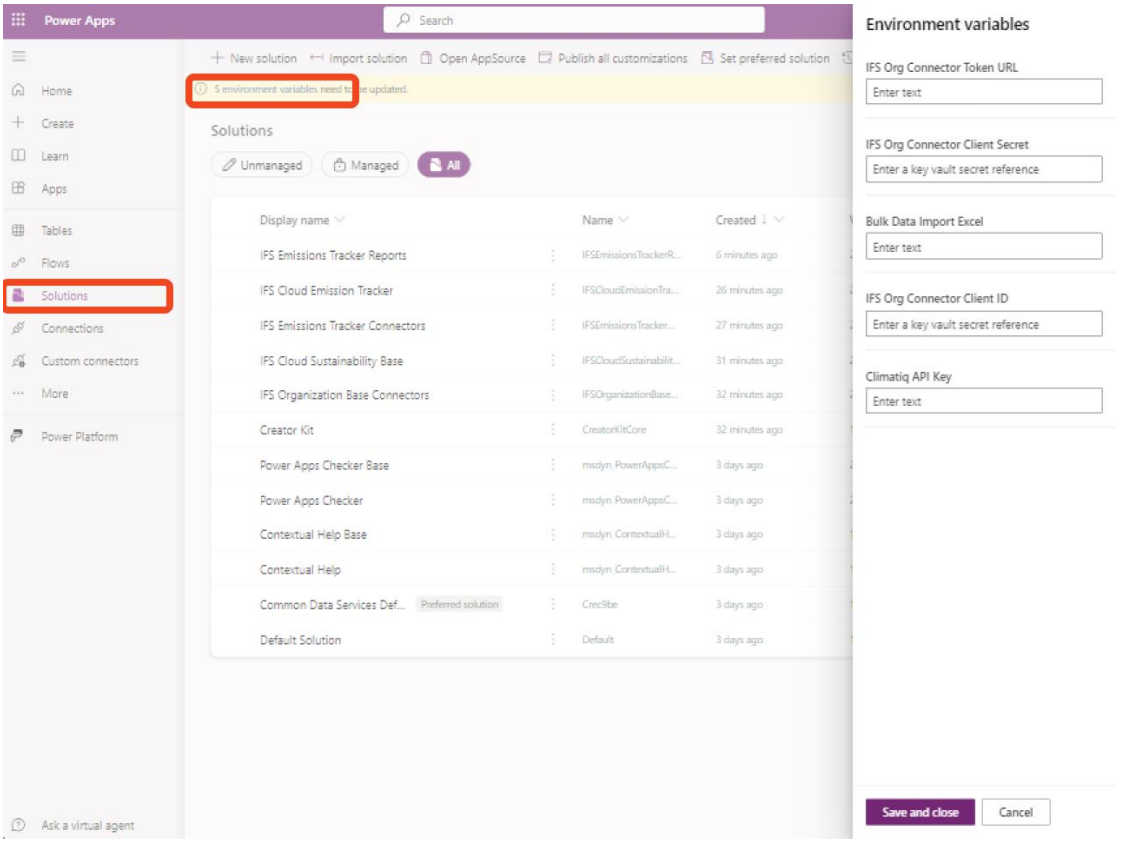
    Ex: My files > Emission Tracker Data > ESG Templates > ExcelFileName.xlsx
    / Emission Tracker Data/ ESG Templates / ExcelFileName.xlsx



1.5 Update Environment Variables

Once you install application successfully, you need to update configuration data to work with IFS Cloud and Excel file.

1. Navigate to your Power apps(make.powerapps.com) Environment and you can see there is warning available to update Environment variables.



Update selected environment variables as below.

	Environment Variable Name	Value	Required
1	Climatiq API Key	{ClimatiQ API Key Received from IFS}	Yes
2	ESG Organization Excel	Section 1.4	No
3	Scope 1 and 2 Data Upload Excel	Section 1.4	No
4	IFS Org Connector Client ID *(IFS Cloud Customer Only)*	/subscriptions/{AzureSubscriptionID}/resourceGroups/{ResourceGroupName}/providers/Microsoft.KeyVault/vaults/{VaultName}/secrets/{KeyName}	No
ex	/subscriptions/00000000-0000-0000-0000-0000000000000/resourceGroups/IFS_Cloud_Data/providers/Microsoft.KeyVault/vaults/IFS-Cloud-Keys/secrets/IFS-Org-Client-ID		No
5	IFS Org Connector Client Secret (IFS Cloud Customer Only)	/subscriptions/{AzureSubscriptionID}/resourceGroups/{ResourceGroupName}/providers/Microsoft.KeyVault/vaults/{VaultName}/secrets/{KeyName}	No
ex	/subscriptions/00000000-0000-0000-0000-0000000000000/resourceGroups/IFS_Cloud_Data/providers/Microsoft.KeyVault/vaults/IFS-Cloud-Keys/secrets/IFS-Org-Connector-Client-Secret		No
6	IFS Org Connector Token URL *(IFS Cloud Customer Only)*		No
ex	ifs23r2bnddevcmb-ext-rnd.corporate.ifs.com/auth/realms/ifs23r2bnddevcmb		No

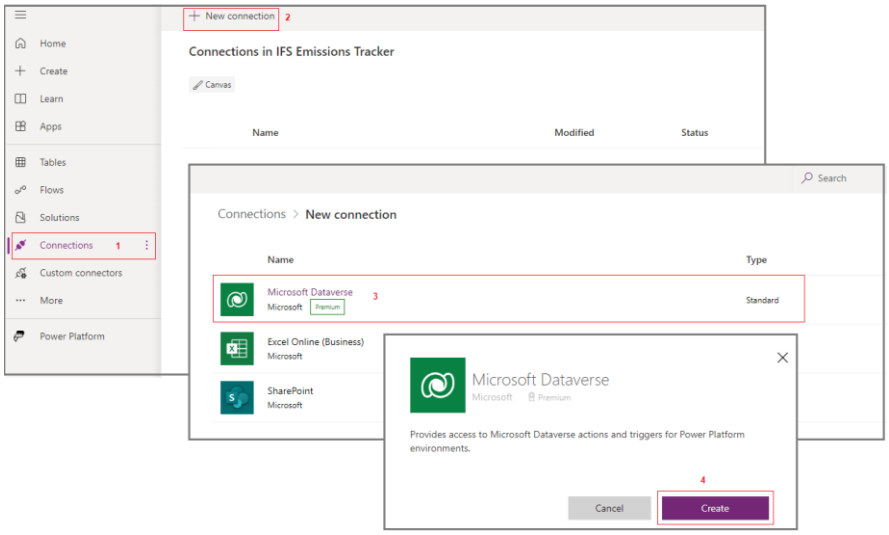
1.6 Configuring Environment Connections

1.6.1 Create Connections

Note: The Excel Online(Business), OneDrive for Business and IFS Organisation connector connections will be needed, if planning to use these features, they are optional.

1. Access the "Connections" option within the Power Apps environment. If you don't see it listed under Navigation, you can locate it under the ...More menu.

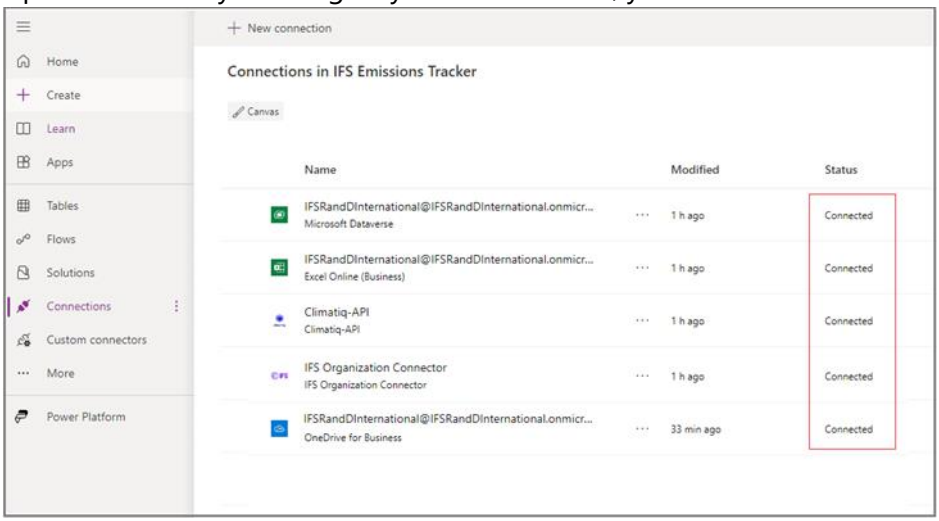
2. Click on "New Connection" and then select **Dataverse** to initiate the creation of a new connection to Dataverse.



3. Follow the same steps for below Connections.

Connection Name	Allowed User	Connection
Dataverse	Any user	Microsoft Dataverse Microsoft Premium
Excel Online (Business)	Any user	Excel Online (Business) Microsoft
OneDrive For Business	Any user	OneDrive for Business Microsoft
Climatiq-API	Any user	Climatiq-API IFS RandDInternational
IFS Organization Connector	(IFS Cloud Users Only)	IFS Organization Connector IFS RandDInternational

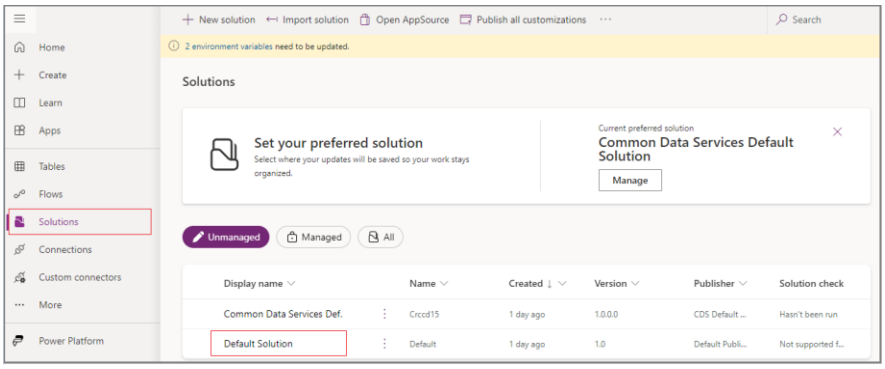
4. Upon successfully creating all your connections, you will see the following:



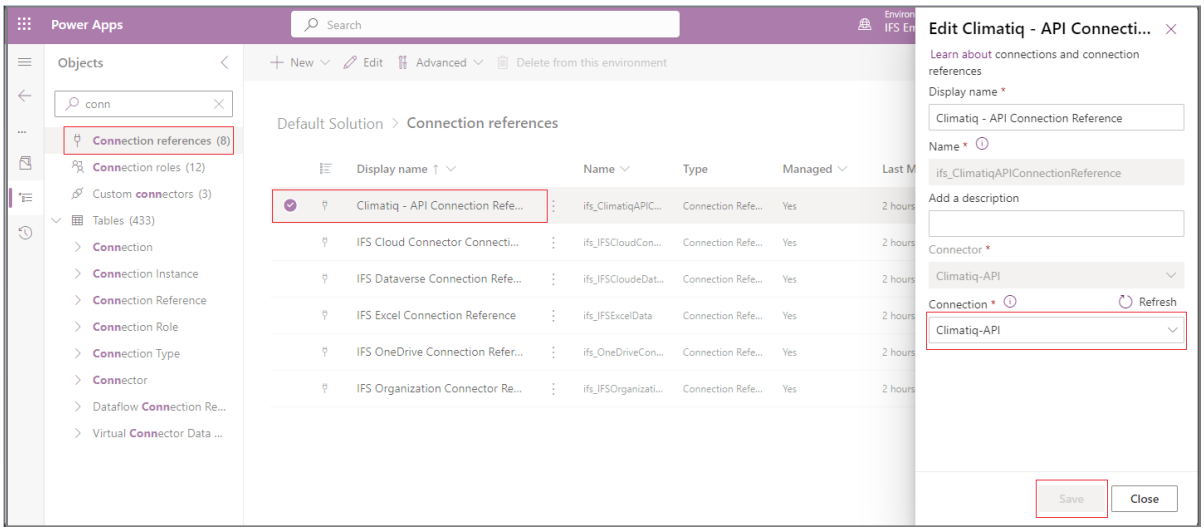
1.6.2 Configure Connections

In here we are going to configure connections created in sections 1.6.1

1. Access the "Solution" section within the PowerApps environment and select **Default Solution**.

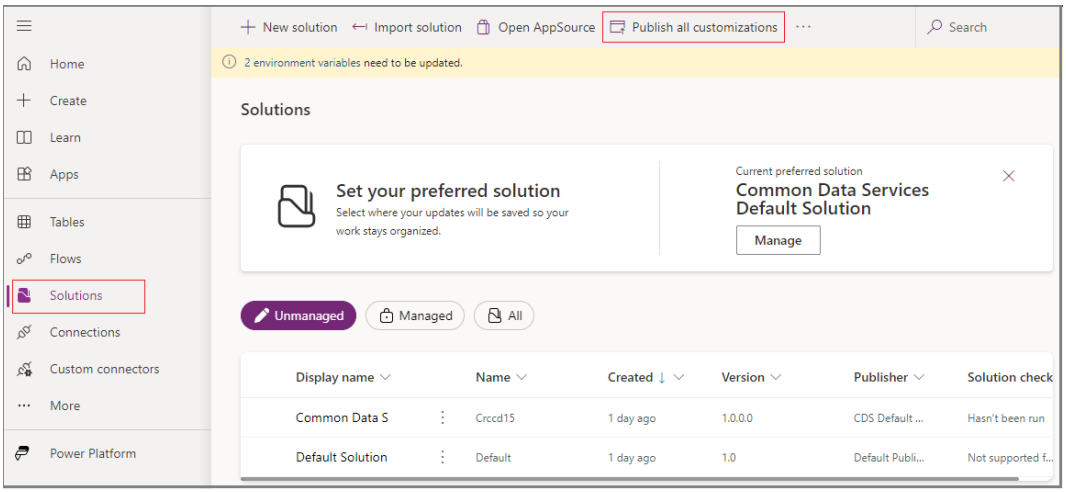


2. Within the default solution, search for **Connection Reference**.
3. Select each connection listed below and select the connection you have created under section 1.6.1.



Connection Name	Allowed user
Climatiq - API Connection Reference	Any User
IFS Dataverse Connection Reference	Any User
IFS Excel Connection Reference	Any User
IFS OneDrive Connection Reference	Any User
IFS Organization Connector Reference	IFS Cloud Customers Only

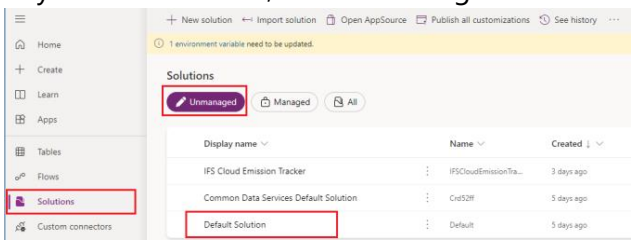
4. Navigate back to Solution and Select “Publish all Customizations”



1.7 Turning on the Emission Tracker Flows and Processes

1.7.1 Turn on Emission Tracker Flows

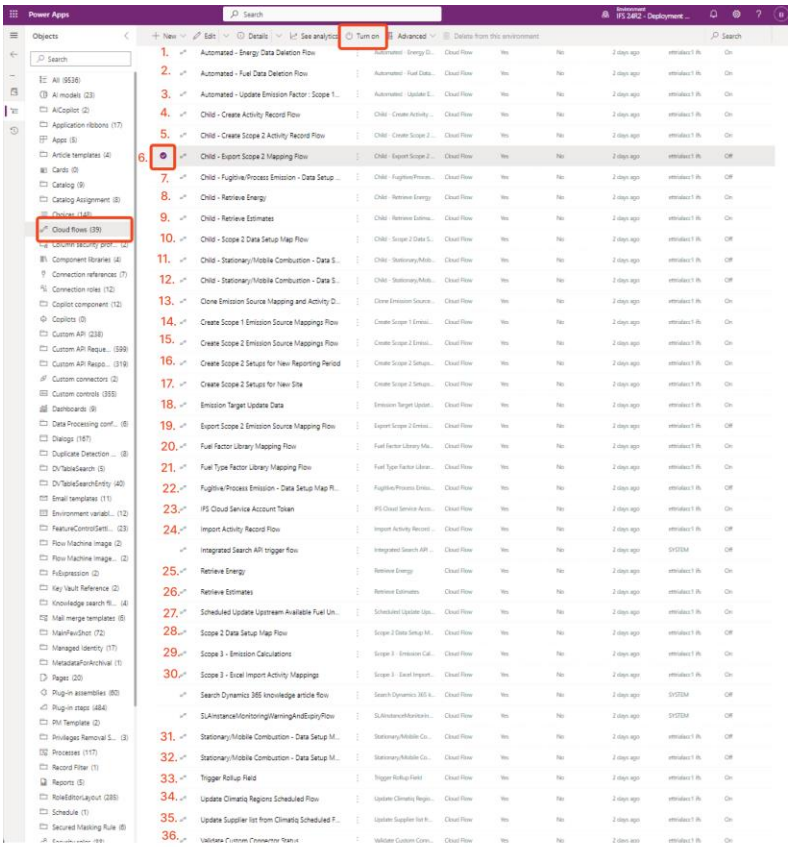
1. In your Environment, from the navigation Select Solutions.



2. Under the Unmanage tab select Default Solution and search for cloud flows. You can see most of the flow's status will be off. We need to turn on all these flows.

Note: Turn on Child flows first.

- Select the flow and click on "Turn On" button on the tool bar. **(If flow status is OFF)**



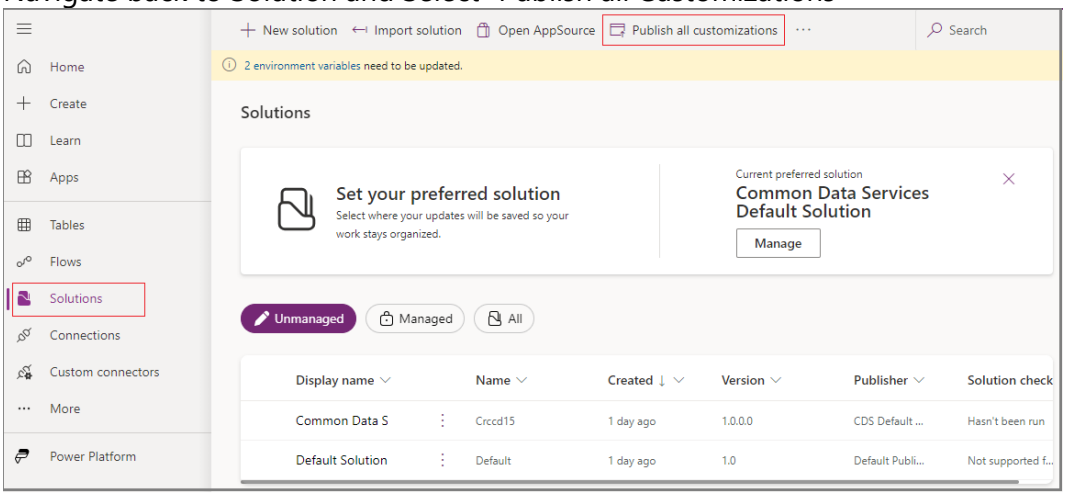
Following are the list of flows and it's related features, if needed that needs to be turned on:

Flow Number	Dependant Feature	Mandatory
1.	IFS Cloud Emissions Tracker	Yes
2.	IFS Cloud Emissions Tracker	Yes
3.	IFS Cloud Emissions Tracker	Yes
4.	IFS Cloud Emissions Tracker	Yes
5.	IFS Cloud Emissions Tracker	Yes
6.	Excel Bulk Upload Feature	No
7.	Excel Bulk Upload Feature	No
8.	IFS Cloud Emissions Tracker	Yes
9.	IFS Cloud Emissions Tracker	Yes
10.	Excel Bulk Upload Feature	No
11.	Excel Bulk Upload Feature	No
12.	Excel Bulk Upload Feature	No
13.	Clone Data Feature	No
14.	IFS Cloud Emissions Tracker	Yes

15.	IFS Cloud Emissions Tracker	Yes
16.	IFS Cloud Emissions Tracker	Yes
17.	IFS Cloud Emissions Tracker	Yes
18.	IFS Cloud Emissions Tracker	Yes
19.	Excel Bulk Upload Feature	No
20.	IFS Cloud Emissions Tracker	Yes
21.	IFS Cloud Emissions Tracker	Yes
22.	Excel Bulk Upload Feature	No
23.	IFS Cloud Organization Import Feature	No
24.	IFS Cloud Emissions Tracker	Yes
25.	IFS Cloud Emissions Tracker	Yes
26.	IFS Cloud Emissions Tracker	Yes
27.	IFS Cloud Emissions Tracker	Yes
28.	Excel Bulk Upload Feature	No
29.	IFS Cloud Emissions Tracker	Yes
30.	Scope 3 - Excel Bulk Upload Feature	No
31.	Excel Bulk Upload Feature	No
32.	Excel Bulk Upload Feature	No
33.	IFS Cloud Emissions Tracker	Yes
34.	IFS Cloud Emissions Tracker	Yes
35.	IFS Cloud Emissions Tracker	Yes
36.	IFS Cloud Emissions Tracker	Yes

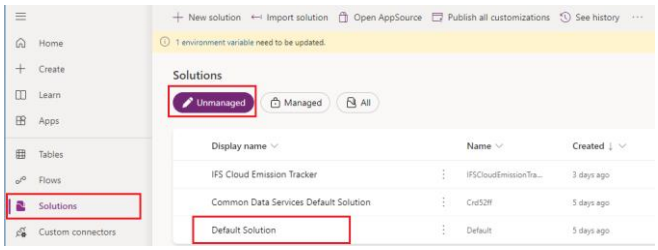
Now you are ready to Go …

Navigate back to Solution and Select “Publish all Customizations”

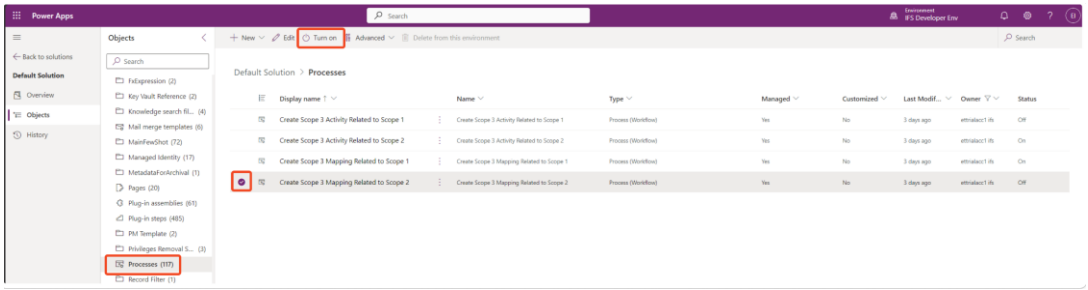


1.7.2 Turn on Emission Tracker Processes

1. In your Environment, from the navigation Select Solutions.

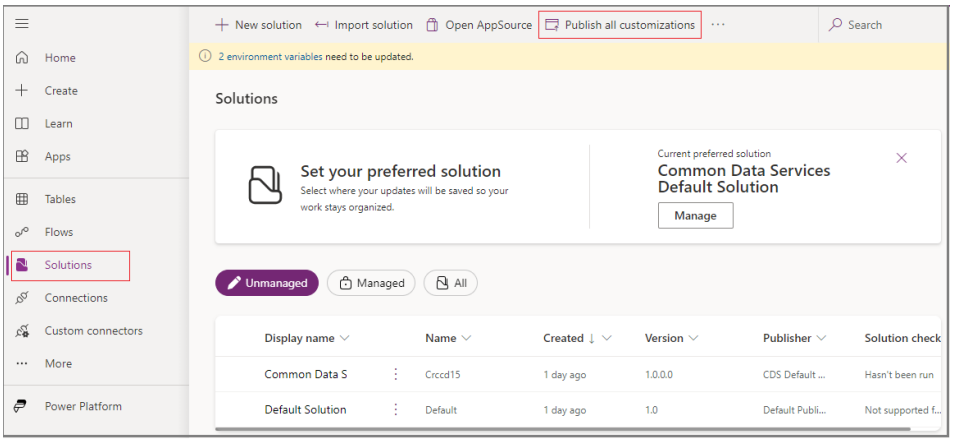


2. Under the Unmanage tab select Default Solution and search for processes. You can see most of the process's status will be off. We need to turn on all these processes.
    - Select the process and click on "Turn On" button on the tool bar. **(If process status is OFF)**



Now you are ready to Go …

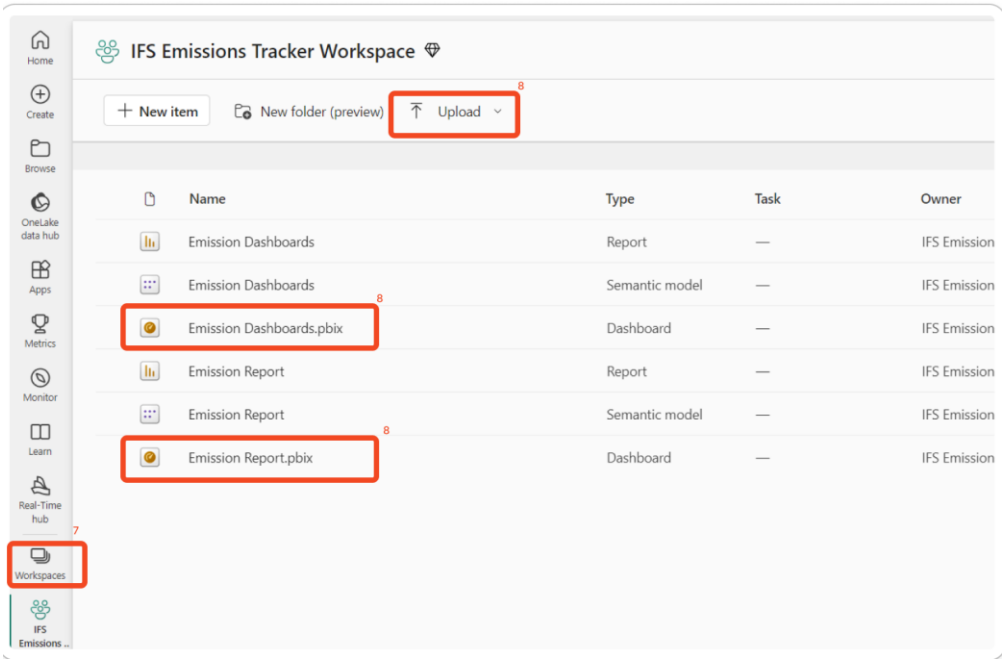
Navigate back to Solution and Select "Publish all Customizations"



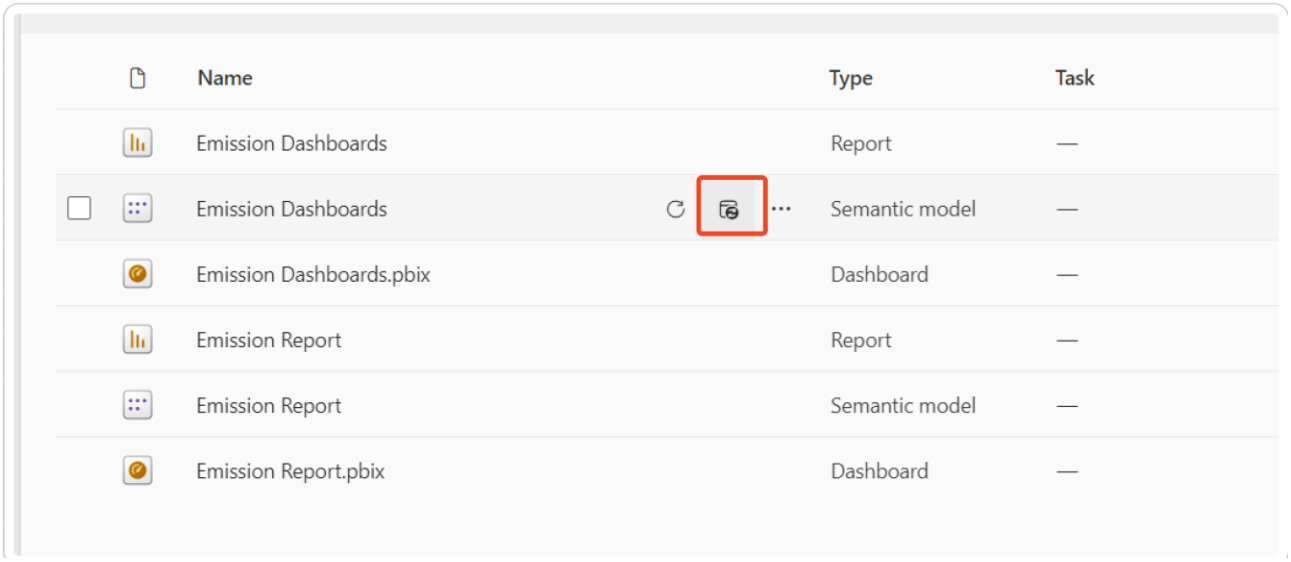
1.8 Refresh Power BI Reports

1.8.1 Add and refresh reports in PowerBI

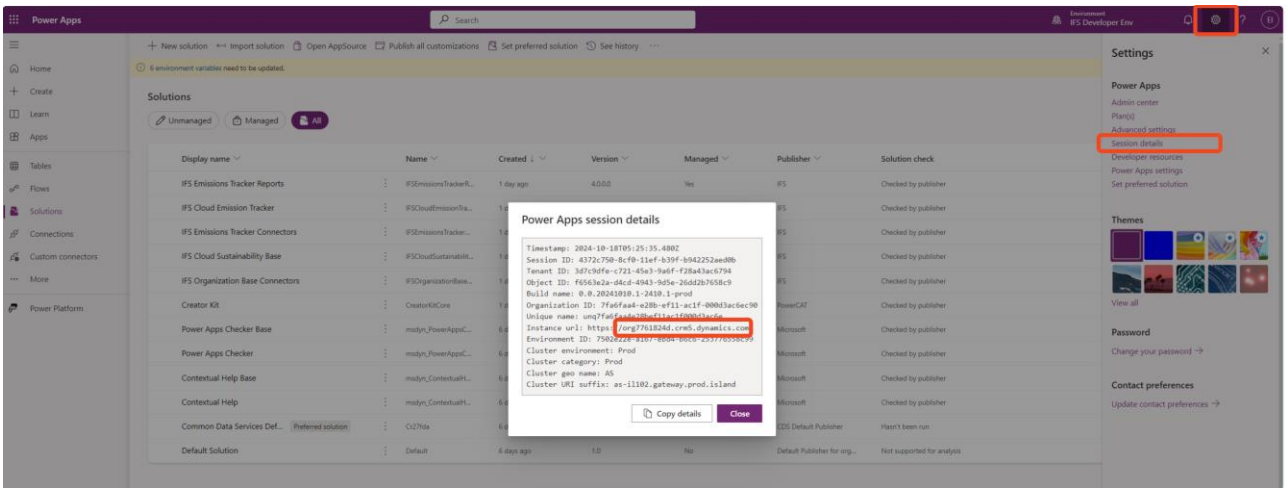
1. Login to Power BI
2. Go to Workspace and select your workspace (if you do not have a workspace already created, please follow these steps to create your workspace). This will open your workspace.
3. Inside your workspace click on Upload and then browse and upload the .pbix files shared to the workspace.



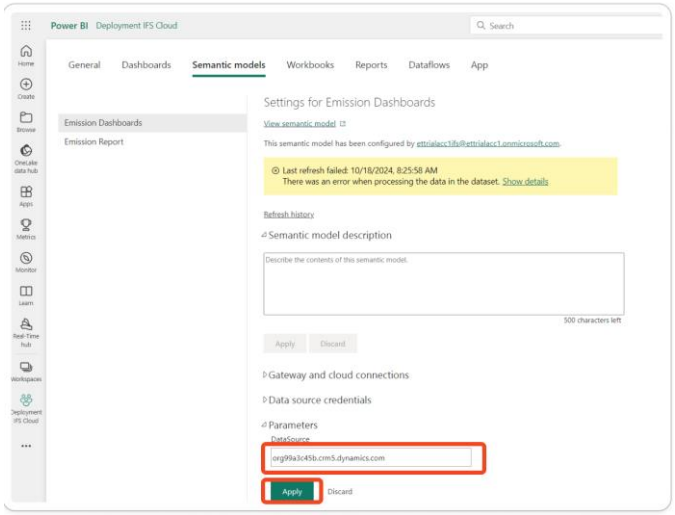
4. From Semantic model type select Schedule Refresh.



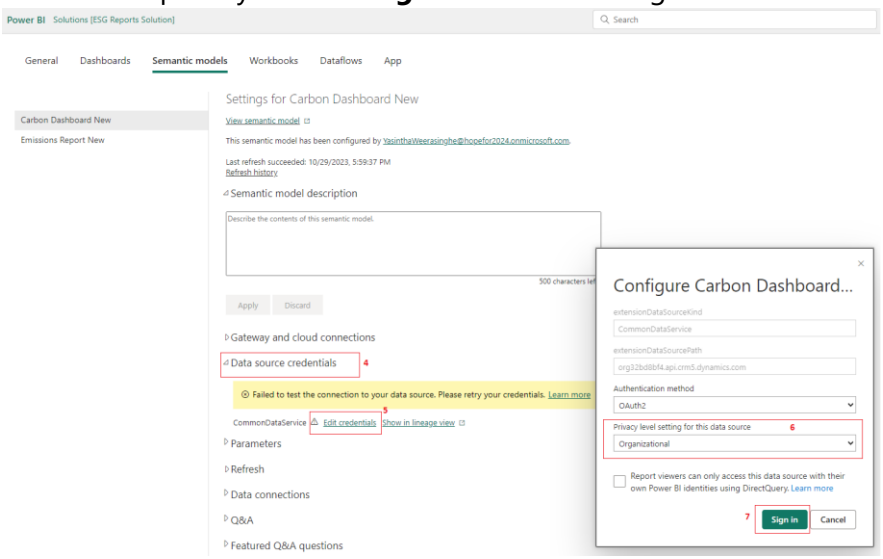
5. Under the parameters section, change your organization URL. You can get this by going to your PowerApps environment, clicking on the settings icon and Next, click on session details.



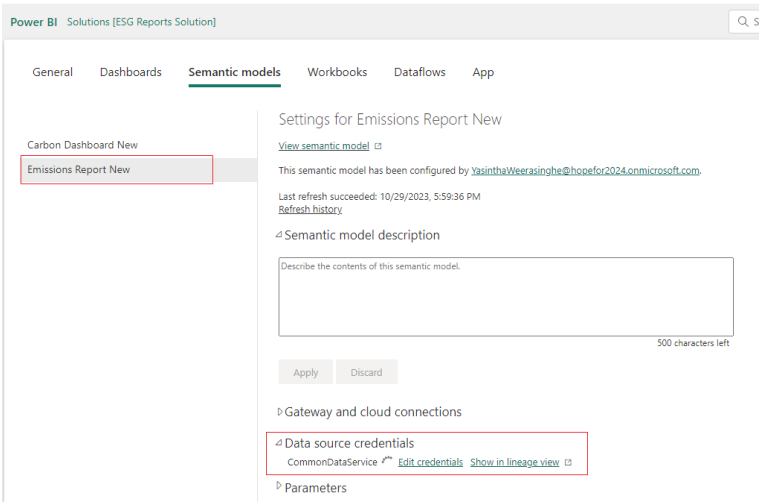
6. After changing your DataSource URL, Click on Apply.



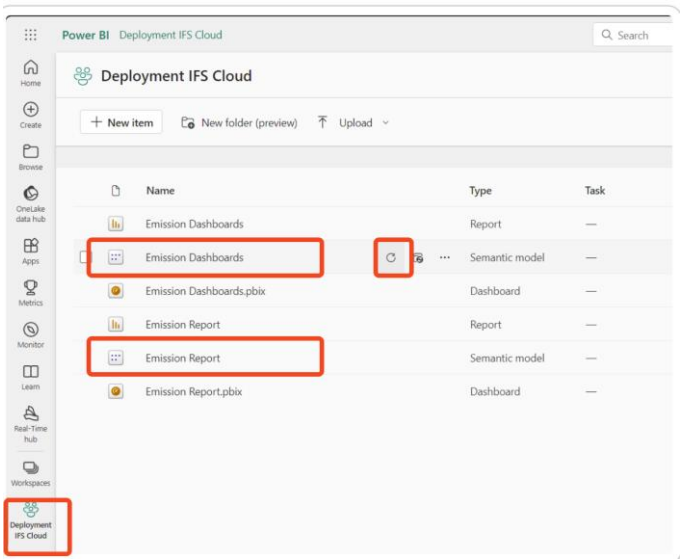
7. Under Data source credentials, select edit credentials. It will populate popup and from there select privacy level as **Organizational** and sign in.



8. Select the Other report and do the same.

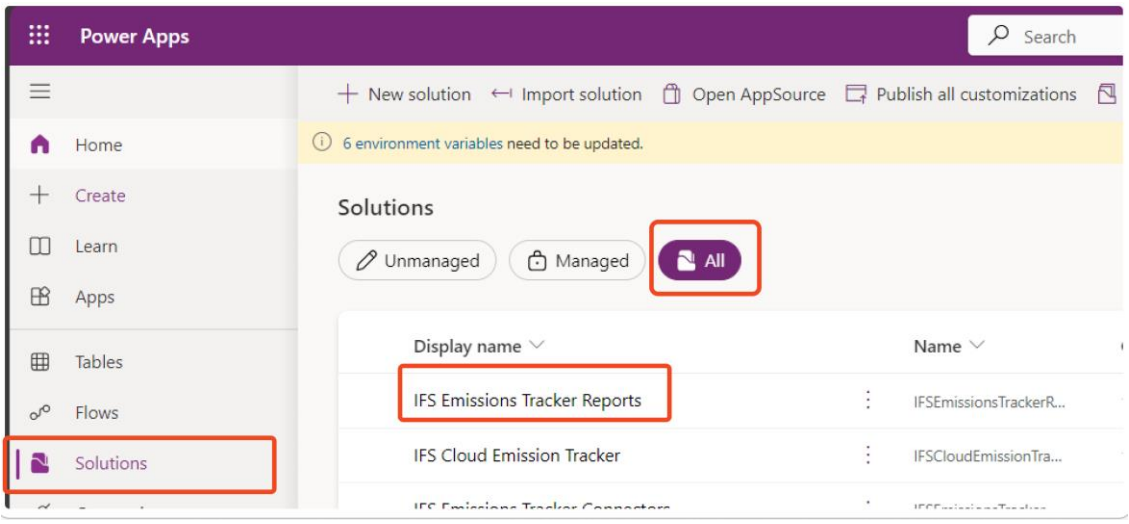


9. Go back to workspace and Refresh the Reports.

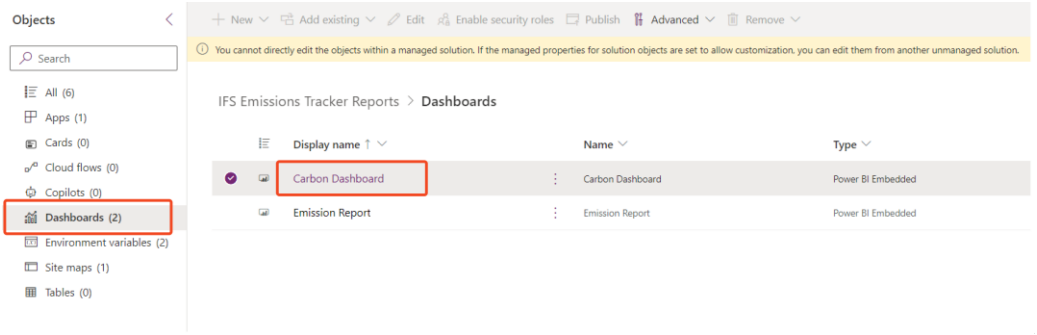


1.8.2 Configure Power BI Reports

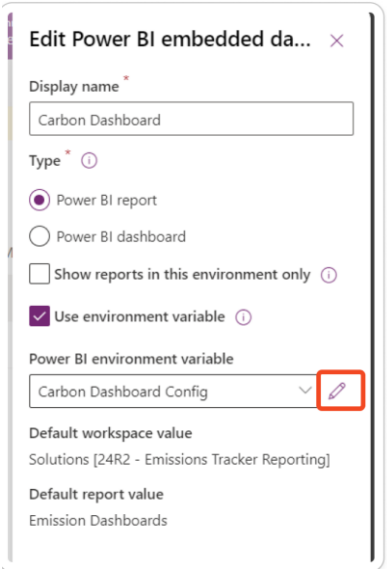
10. In your environment, navigate to solutions, IFS Emissions Tracker Reporting solution.

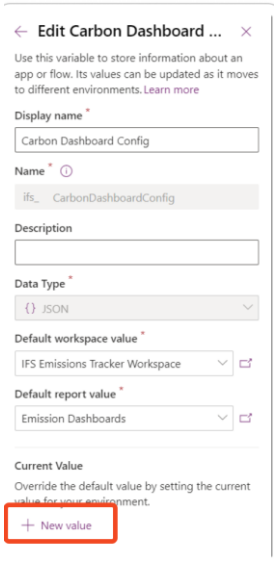


11. Navigate to the dashboard section and select carbon dashboard.

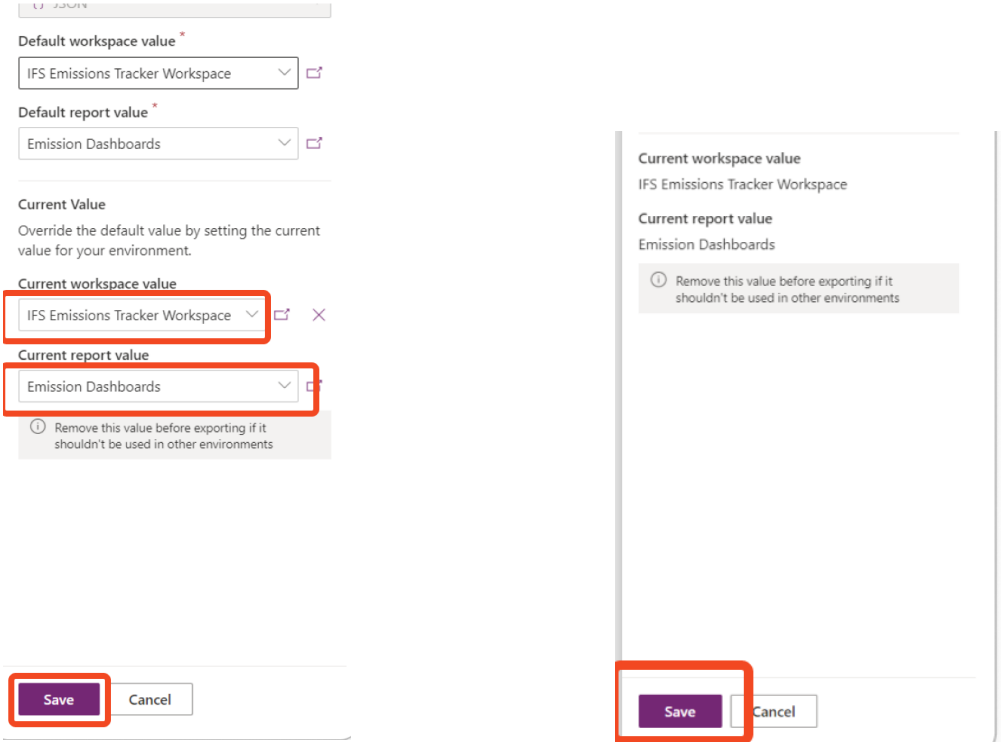


12. Go to edit Power BI Environment Variable. And select on new current value.





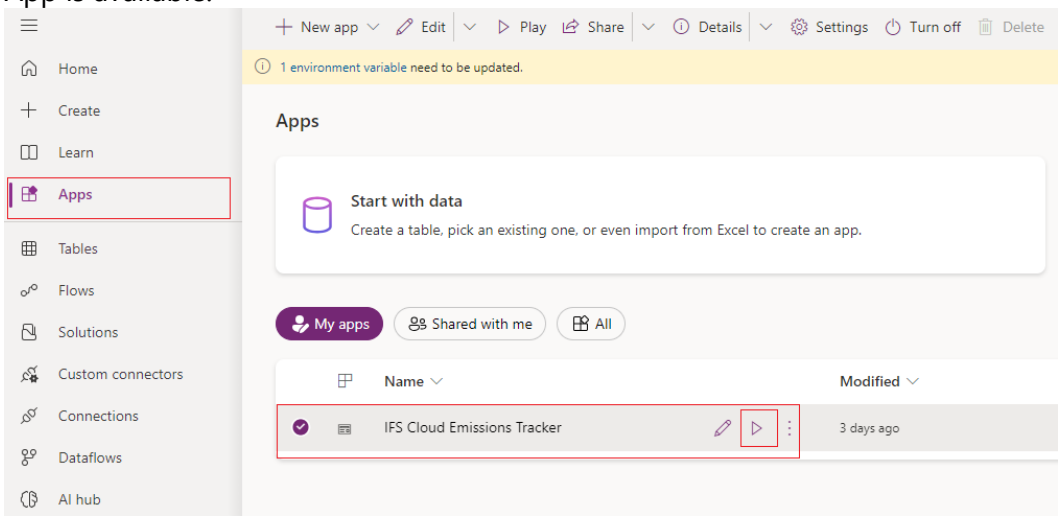
13. Select your workspace and the related report that you have added from the previous step and click on Save. And click on Save again in your Edit Power BI embedded panel again.



14. Repeat steps 1 – 4 for emission reports dashboard as well.

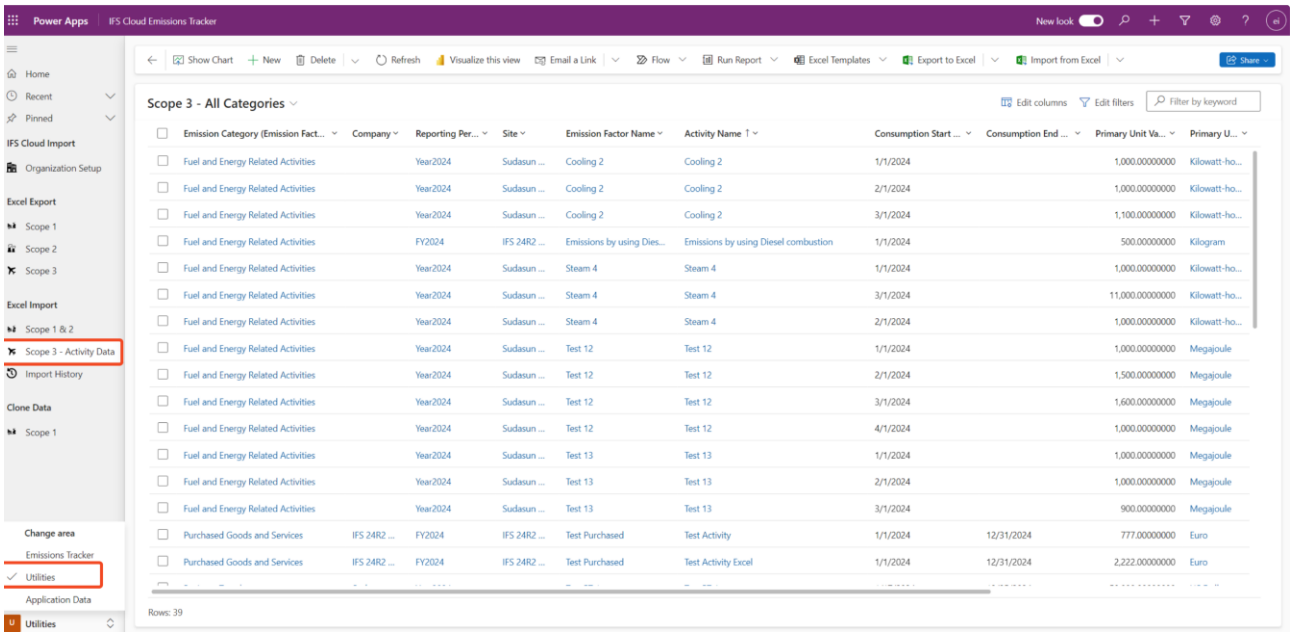
1.9 Run Your Emissions Tracker Application

In your Environment, from navigation select Apps and now you can see **Emissions Tracker** App is available.



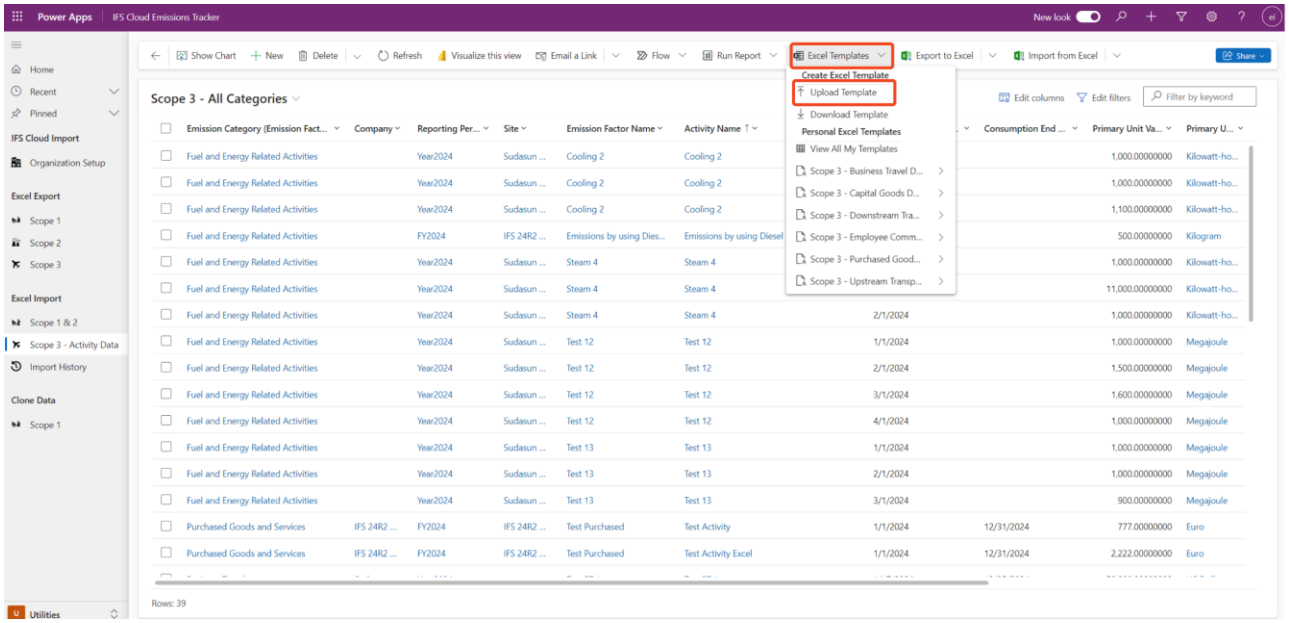
1.10 Configure your Scope 3 Excel Import Templates

In your emissions tracker application, from navigation area select utilities and under Excel import navigate to ‘Scope 3 – Activity Data’.



Go to Excel Templates, and upload your scope 3 template excel files included with in package.

You can find the scope 3 excel template files under the Excel Templates 24R2 -> Scope 3 Import Templates



2. Security Roles and Sharing Emissions Tracker Application with Users

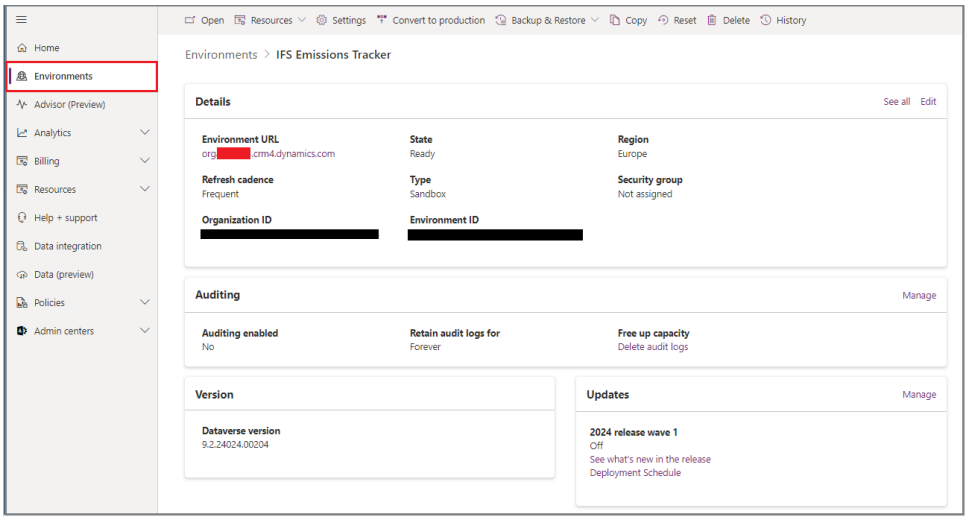
The Emissions Tracker currently includes the following security roles:

Role Name	Access Level
IFS ESG Manager	Full Access to the Application
ESG Admin	Full Access to the Application, Including Error Logs and ability to turn on processes

Note: Please make sure to assign the ESG Manager role to the end users and limit administrator access only to the designated administrators or system owners.

2.1 Share the Application with Users

1. Navigate to the Admin panel of your Environment. (Power Platform admin center)
2. Select the Environment and within the Environment Details select the Environment URL



Next…

1. IFS Cloud Emissions Tracker Installation Guide
2. IFS Cloud Emissions Tracker Configuration Guide (you are here…)
3. IFS Cloud Emissions Tracker User Guide
4. IFS Cloud Emissions Tracker Support and Troubleshooting Guide