IFS Cloud Sustainability Planner

User Instructions

Contents

IFS Cloud Sustainability Planner Application

The initial release of the application focuses on helping users understand the data needed to help drive them towards standards compliance. This release will allow users to make use of sustainability-related templates to perform self-assessments against a variety of compliance requirement standards.

We are launching the application under a freemium model with us monetizing this via our IFS Cloud API Consumption in future releases.

It is based in an environment that has over 250M active monthly users - Microsoft Teams. There are two versions of the application, a desktop version and a mobile version:

- **Desktop - Sustainability Planner:** An individual who looks after ESG (ESG Manager) for their company will log into the desktop version of the app. They will use an existing template or create their own form to request ESG-related information. They will then create a campaign where they will assign the form to relevant team members for completion.
- **Mobile - Planner Mobile**: A team member will download the mobile app and they will be able to easily see their assigned actions. After they have completed their assigned form, it is submitted back to the ESG Manager which can provide feedback and approve or deny the form. A denied form is returned to the team member to provide additional information. The ESG Manager tracks progress on their dashboard on the desktop version.

Figure 1 shows the business process flow from the desktop app to the mobile app.

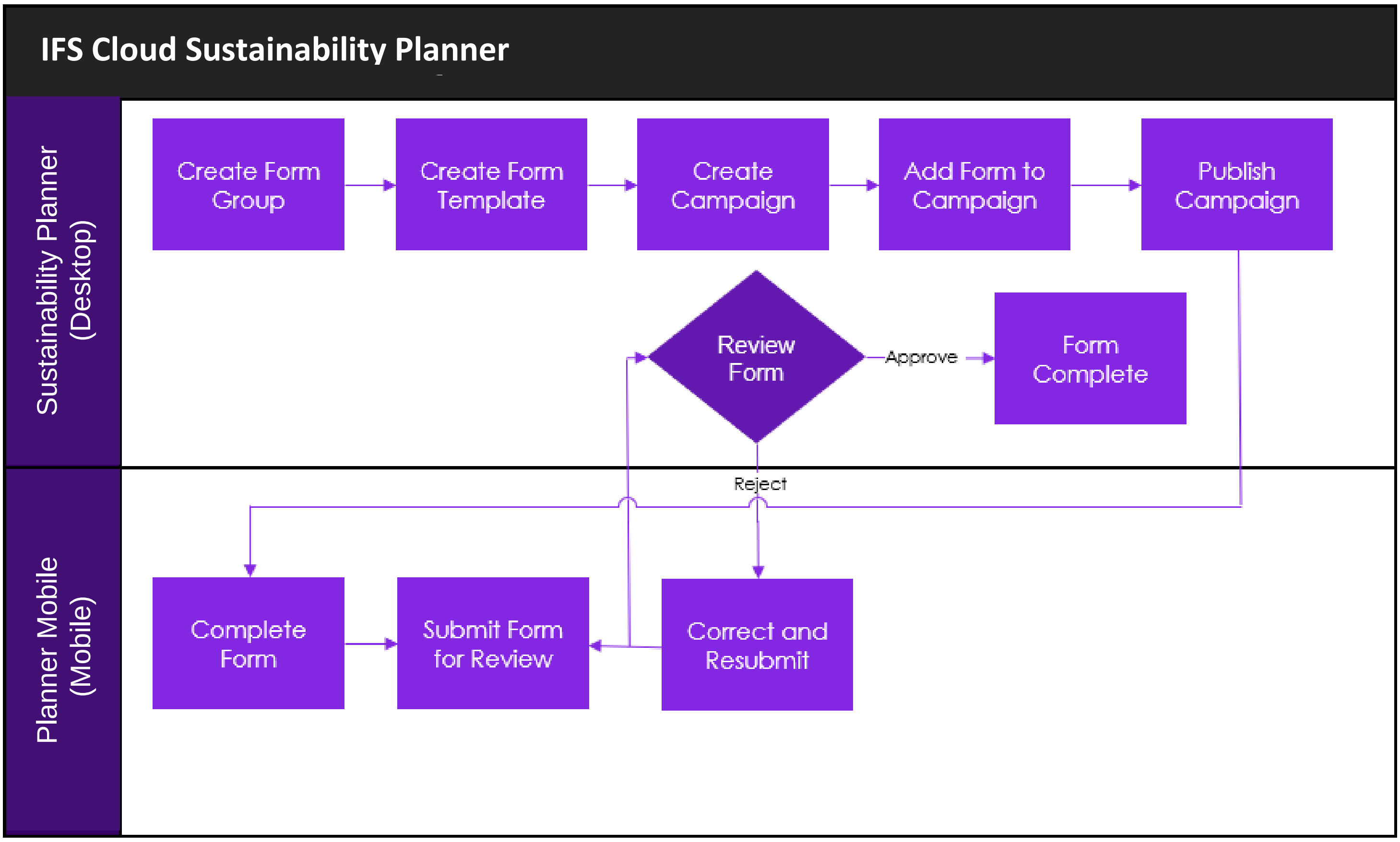


Figure 1: Business Process Diagram

Setting up the App:

Please follow below steps to setup the application,

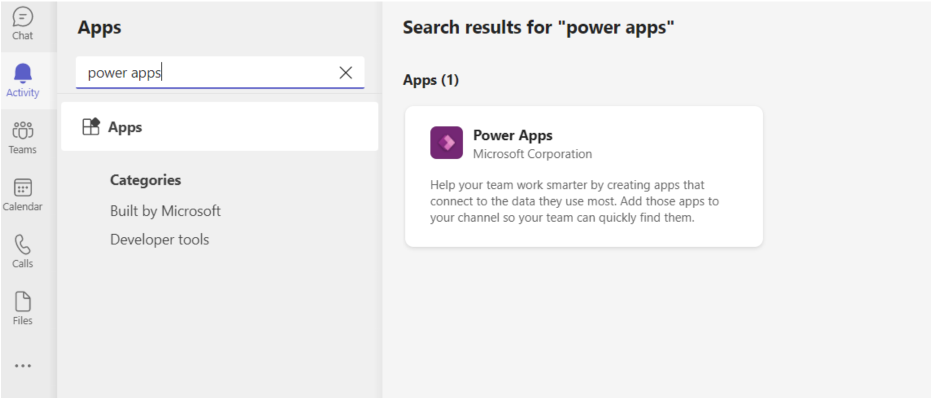
Step 1: Search for "IFS Sustainability Planner" in your MS Teams app store and install it

Step 2: You can select in which channel you want the Desktop app to be installed

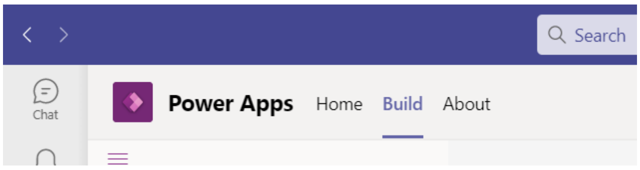
Step 3: Once the Desktop app " Sustainability Planner " is installed you can then go back to MS Teams

Step 4: Go back to app store in order to install "Power Apps" to setup the Mobile version of the app

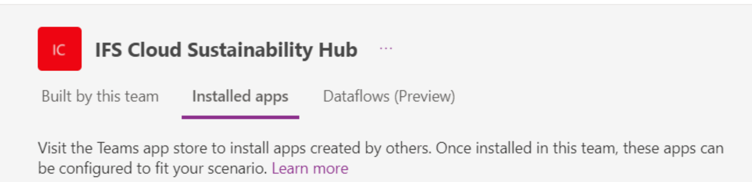
Step 5: Search for "Power Apps" in your MS Teams app store and install it



Step 6: Open "Power Apps" and go inside the "Build" tab



Step 7: Go into "Installed Apps" Tab



Step 8: Click on See all in the section where you see "Planner Mobile"

Step 9: Locate "Planner Mobile" from the list, click on three dots and click "Add to Teams"

Step 10: Add the App to your Teams channel. You have now successfully installed the apps

Terminology Used in the App:

Campaign: A campaign is set by the user of the Sustainability Planner desktop app and is composed of multiple forms
Form: A form is created by the user of the Sustainability Planner desktop app and is the method used to gather information. The user of the PlannerMobile App(Mobile) answers the questions on the forms.
Form Group: A form group is a folder-style way of grouping similar form templates together
Report: A report is the final output of the information gathered. This user guide will explain how to export the data. The current version of the application does not support embedded reporting yet.

Desktop Version: Sustainability Planner

Access the Sustainability Planner

1. Navigate to the team in which the Sustainability Planner is installed.
2. Click the **Team**
3. Click the **Sustainability Planner** tab

Add Sites

The initial step the **first time you run the app** is to add sites. As you add campaigns, you will associate them with sites so you can separate your campaigns by site. Use the following steps to add a site.

1. Select the settings gear on the top right of the **home** screen.

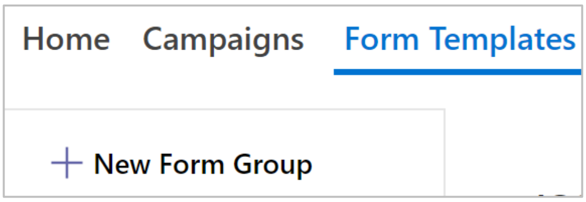
2. To add a location select **Add Site**.
3. Select **Save** to save sites.

Create a New Form Group

Form groups are used to organize your form templates. In this section we will walk through how to create form groups. You can think of form groups as folders.

1. Select **Form Templates**

2. Click Add **New Form Group**



3. Type the form group name

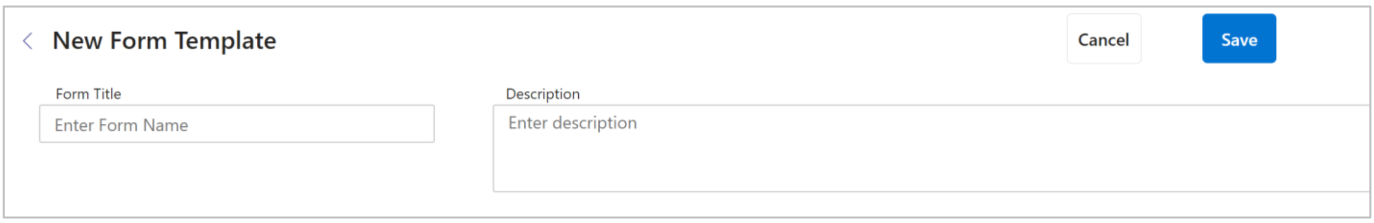
4. Click **Save**

Create a Form Template

A form is created by the user of the Sustainability Planner desktop app and is the method used to gather information. The user of the PlannerMobile App(mobile) answers the questions on the forms. The user can create a form template or use one of the pre-loaded templates, for example ISO 14001 Self-Assessment)

In the form group screen, click **Add Form Template** button

1. Complete the following fields
   a. Form title
   b. Description
   c. Section title



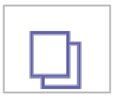
2. Click Add Section to create the applicable number of sections
3. Enter a **Section Title**
4. Click **Edit Question** to add or edit a question

5. Click the **Add Question** drop down
   i. Select **Text** to add a text question
   ii. Select **Choice** to add a choice option
   iii. Select **Value** to add a value option

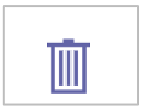
Copy, Delete, Reorder

You can change the layout of your questions.

1. Click the copy icon to duplicate a section, question, or option



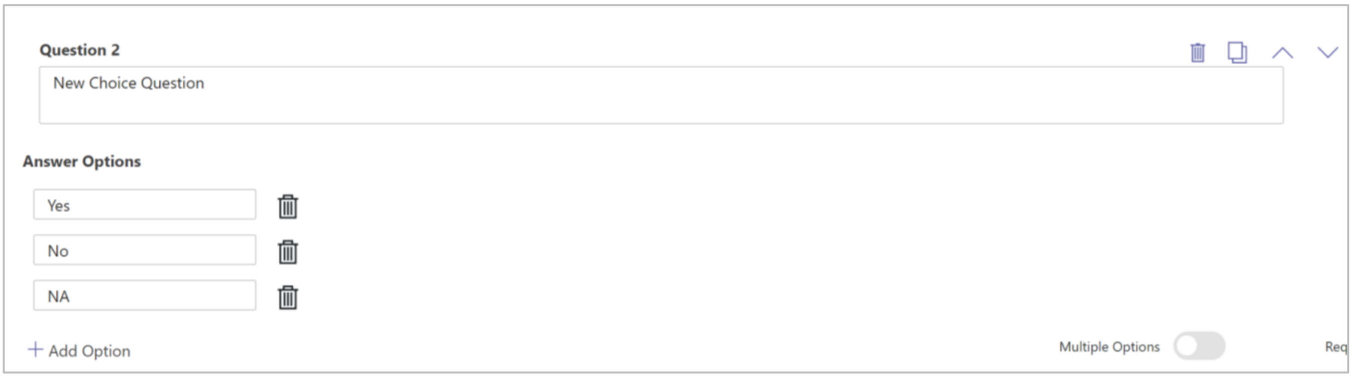
2. Click the trash icon to delete a section, question, or option



3. Click the up or down icon to reorder a section, question, or option

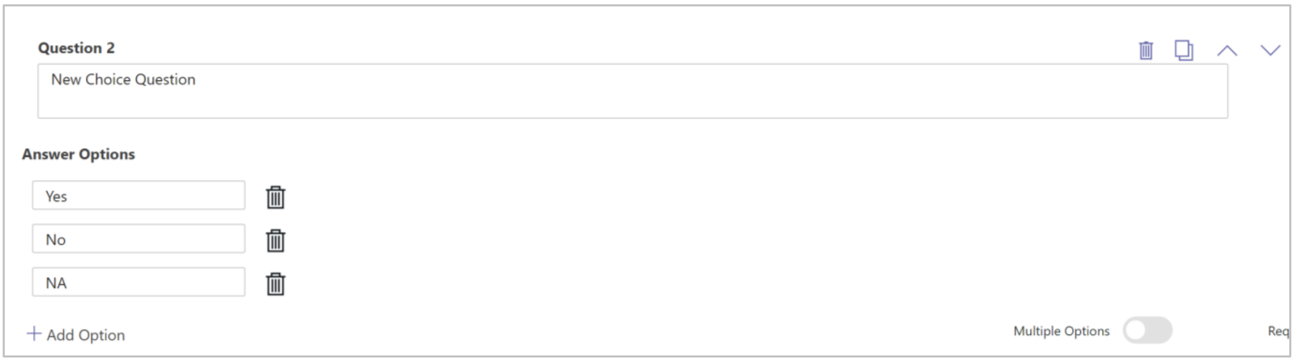
Adding Options

For the choice question, click **Add Option** to add additional options.



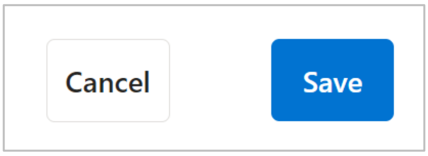
Allowing for Multiple Options Answers

For the choice question, use the **Multiple Options** slider. When the slider is on, then more than one multiple choice answer can be selected when answering the question.



4. Click the back button (below is example is for a section titled "Section 1")

5. Click **Save**



Save the Form Template

Once you have completed adding all sections and questions, select the **Save** button. Once saved, the application will navigate back to the form category list.

Edit Form Template

Use these steps to edit a form template after you have created and saved it.

1. Select the **Form Templates** tab
2. Select the form category for the form template you wish to edit.
3. You will see the list of form templates for the selected category.
4. Select the **Edit** button to open the template and edit it.

Add a Campaign

A campaign is set by the user of the Sustainability Planner desktop app and is composed of multiple forms. Campaigns have a due date, which is the date by which all forms associated with the campaign must be completed.

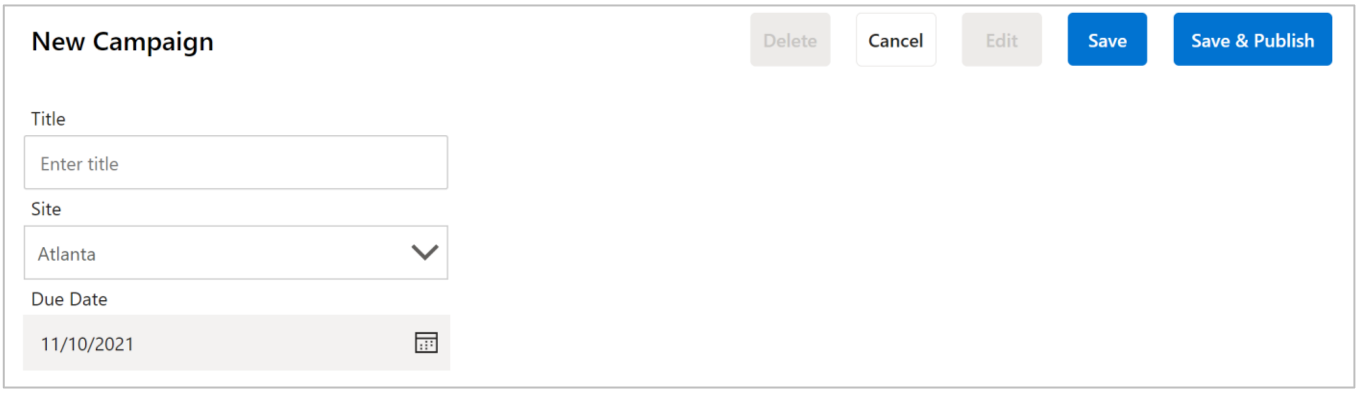
For example, in preparation for ISO 14001 audit, you may create an ISO 14001 campaign to which you will add one or more forms that you will assign to employees to complete.

Follow the steps in this section to create a campaign.

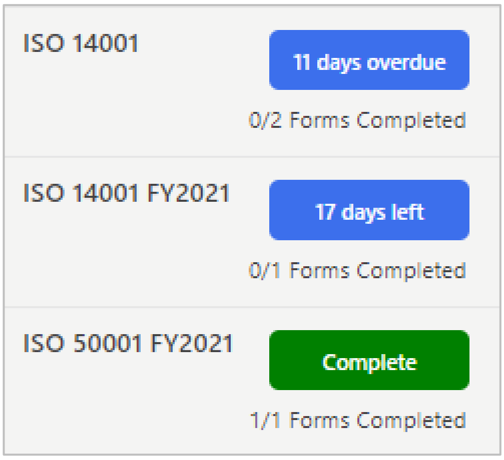
1. Click the **Campaign** tab

2. Click **New Campaign**

3. Complete the following steps:
   a. Enter campaign title
   b. Select a site name
   c. Select due date
   d. Click Save



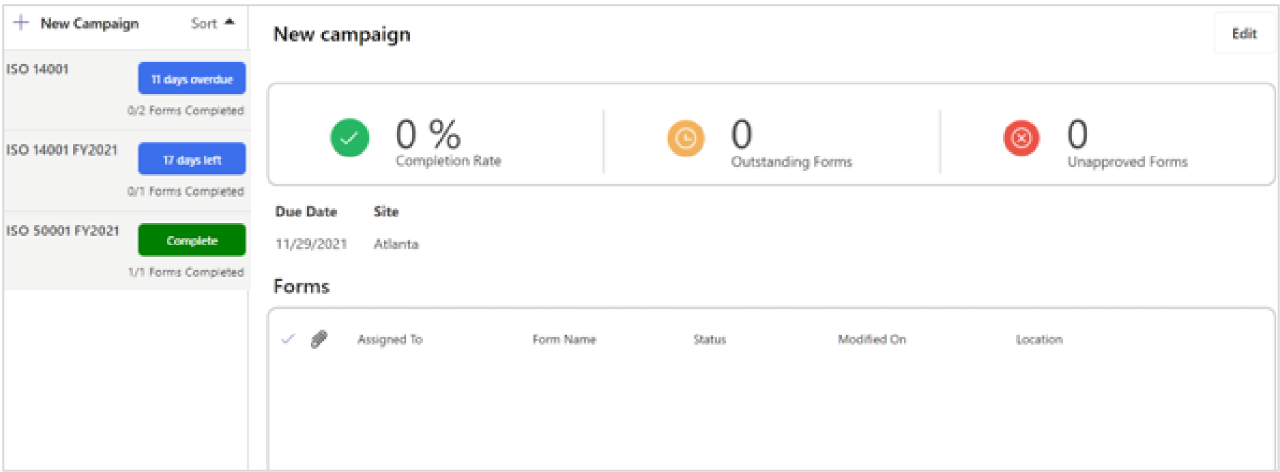
4. The campaign displays in the left pane



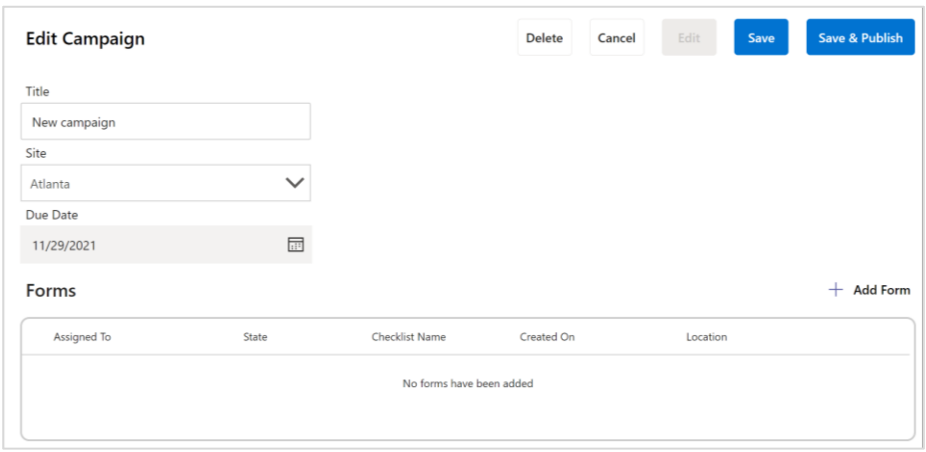
Add a Form

In this section we detail how to create forms associated with a campaign.

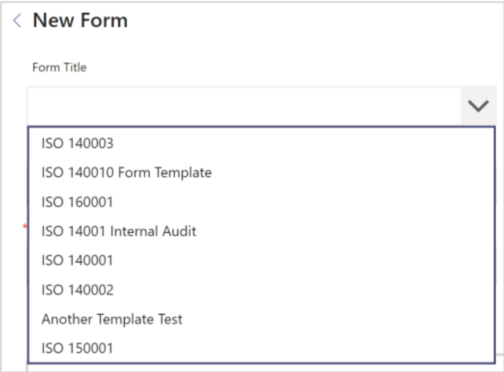
1. Select the campaign in the left pane
2. Click **Edit**



3. Click **Add Form**



4. Click the form drop down and select a form template



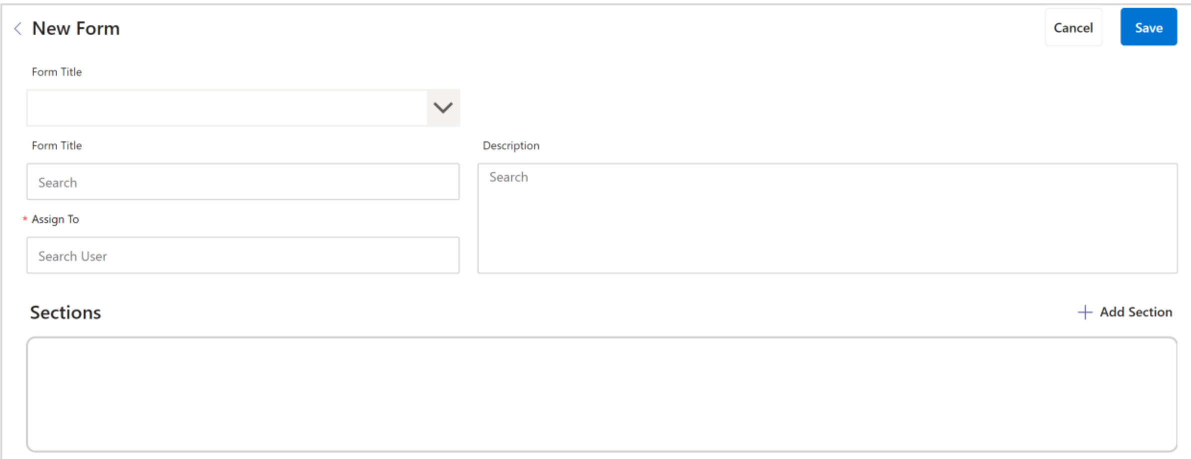
NOTE: Once you select the form template, the sections and questions from the selected form template will appear on the form. The template is a copy, you can modify these sections and questions without affecting the template.

5. Enter the assignee's name in the **Assigned To** field

NOTE: The assigned user determines which user of the PlannerMobile will have access to answer the form.

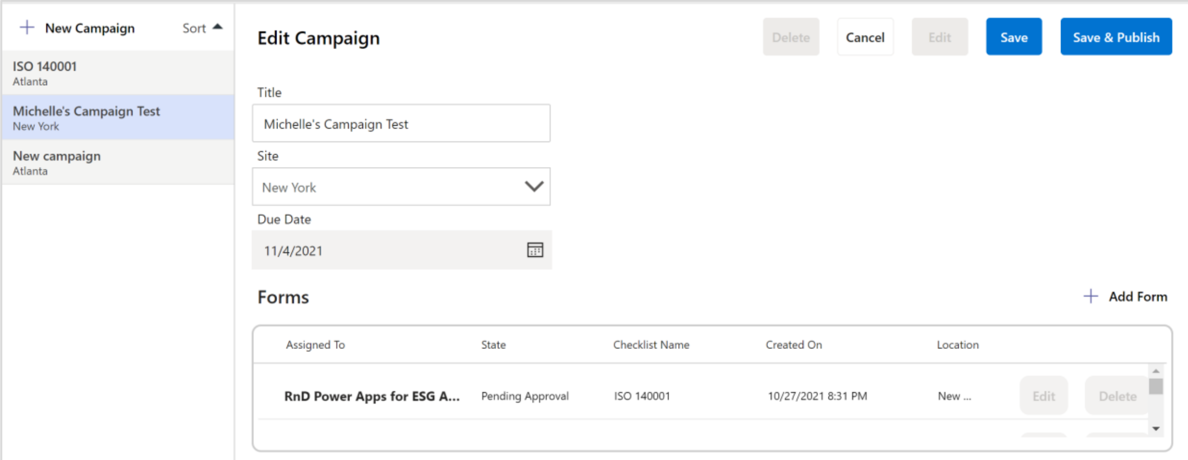
6. If you wish to add additional sections to the form, you can select the **Add section** button to add additional sections.

7. Edit a section question and navigate back to the section, if applicable



8. Click **Save**

9. The campaign screen and forms display



10. If you wish to add additional forms to your campaign, select the **Add Form** button.

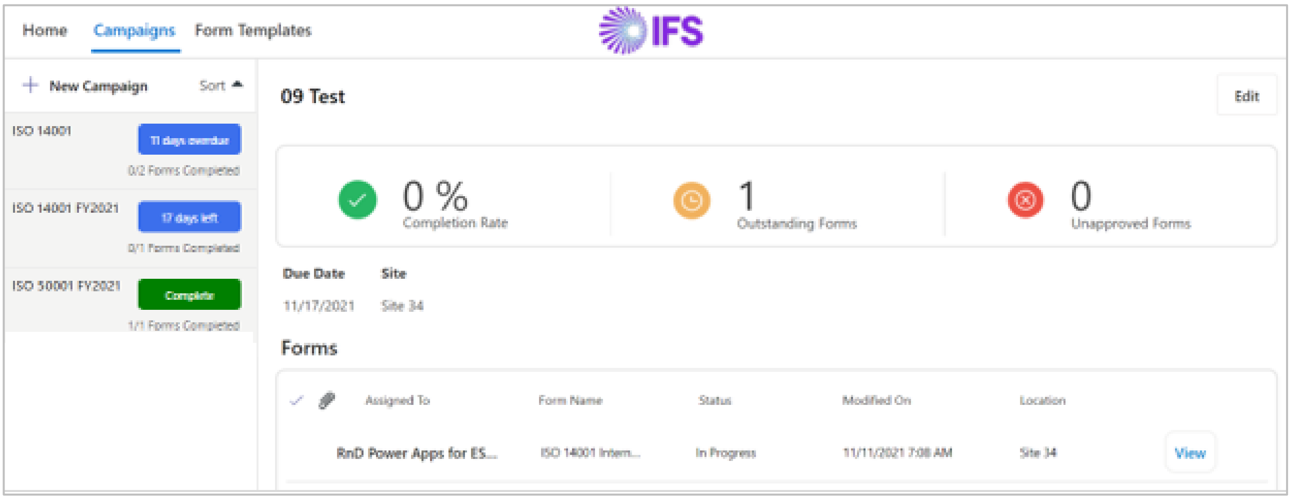
11. Once all of the forms have been added to the campaign, select **Save & Publish**.

    <u>NOTE</u>: publishing the campaign will set all forms associated with the campaign to **Not Started** status and they will become available to be completed via the PlannerMobile (Mobile).

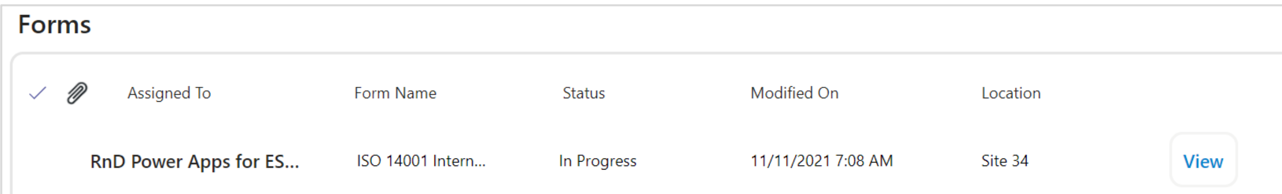
Campaign Review and Approval

As employees' complete forms in the PlannerMobile App, managers can review and approve submitted forms in the Sustainability Planner app. Follow these steps to review campaigns and approve forms.

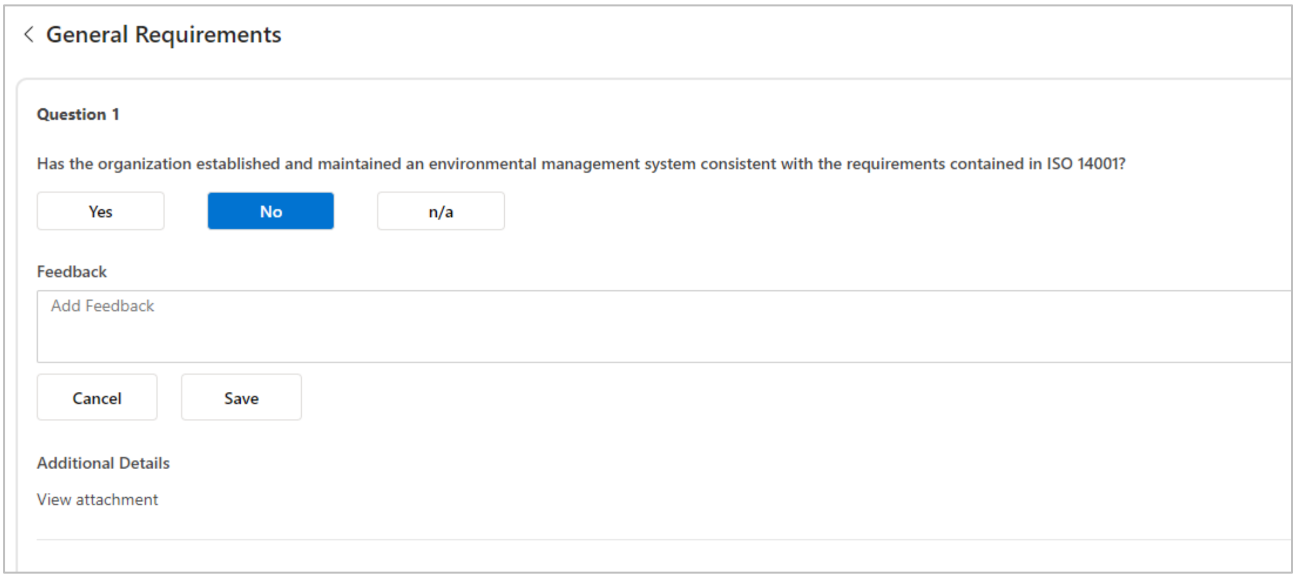
1. Click the Campaign tab and select a campaign



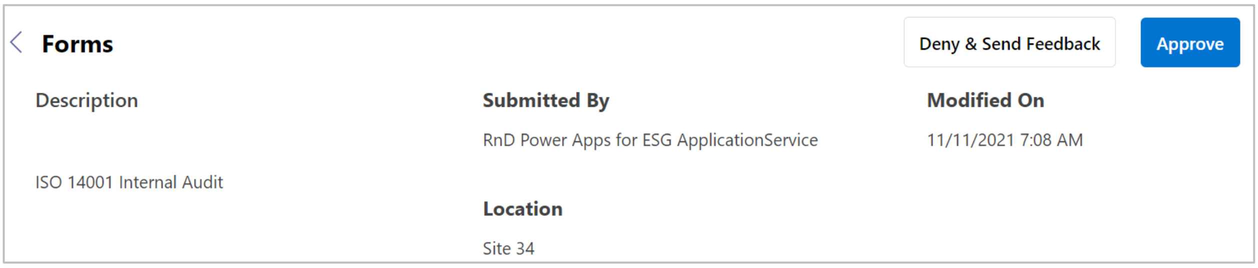
2. Click **View** on the applicable form to review



3. You will see the form sections. Select the section you wish to review.
4. You will see the questions in the section as well as the provided answers.
5. If you have feedback for the submitter, add feedback under the response for any question.



6. Click **Approve** or **Deny & Send Feedback**



7. When **Approve** is clicked the form status changes to completed and the forms completed count in the left pane is updated.
8. When **Deny & Send Feedback** is clicked feedback is sent to the assignee and the status is set to returned.

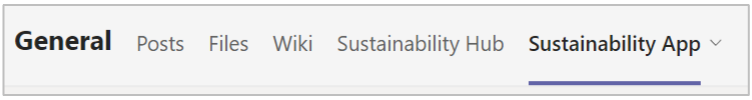
Mobile Version: Planner Mobile

Planner Mobile is used by employees as they complete forms assigned to them. They can complete forms as well as respond to feedback from managers. Planner Mobile is intended for use on a mobile device, however, is can be accessed using the "Planner Mobile" tab on any device including a PC.

Access the Planner Mobile App

To access the Planner Mobile, follow these steps.

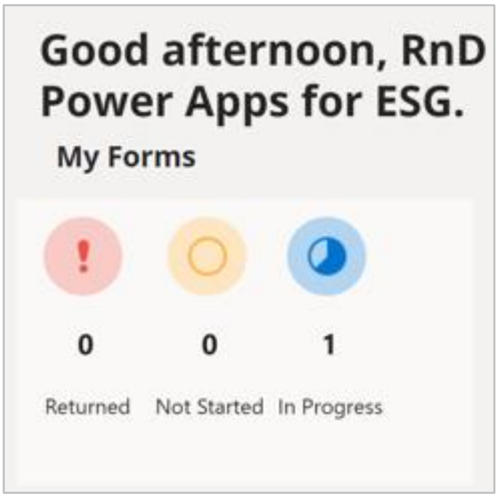
1. Navigate to the team in which the app is installed.
2. Click the **Planner Mobile** tab



Welcome Screen

The welcome screen displays the following report metrics (there is no counter for completed forms):

1. Returned
2. Not Started
3. In Progress

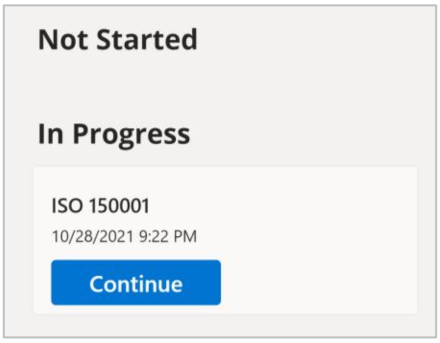


Completing a Form

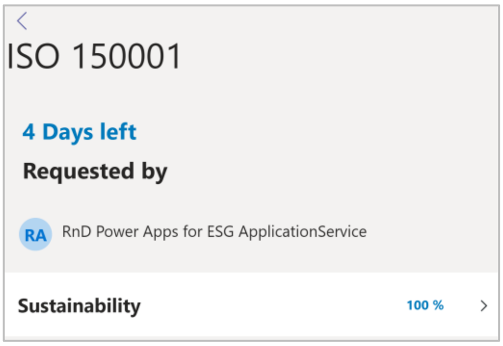
A form is created by the user of the Sustainability Planner desktop app and is the method used to gather information. The user of Planner Mobile App answers the questions on the forms.

In this section we will detail how to complete a form.

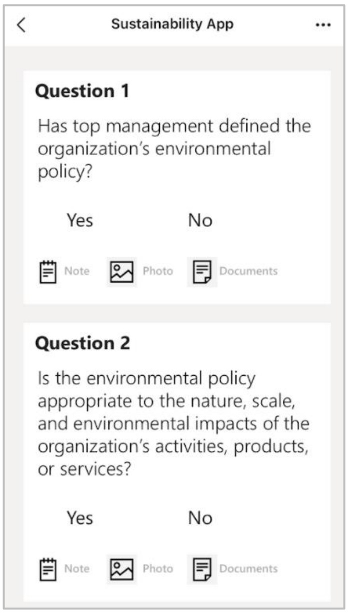
1. Click **Continue** on a form listed under Not Started, In Progress or Unapproved Forms

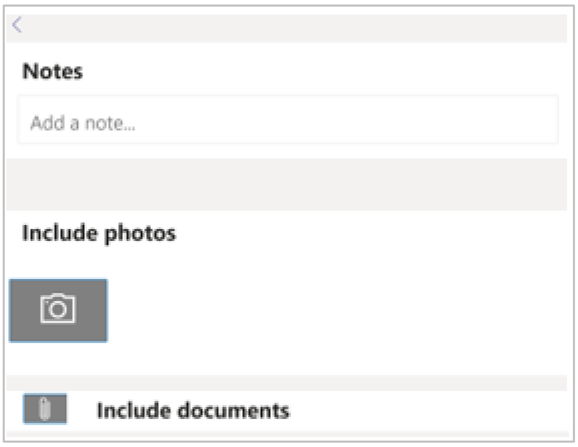


2. Select a section to complete



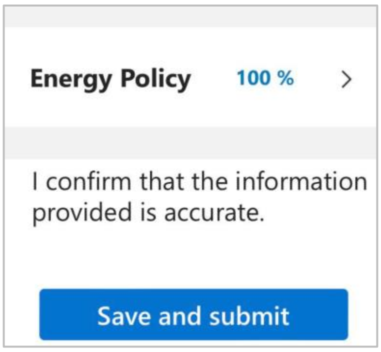
3. Answer the question(s). If applicable, click **Note**, **Photo**, and/or **Documents** to add the corresponding text or file.





4. Click **Save Details.** The Save button is enabled when all questions are answered.

5. The form screen displays
6. Click Save. The Save button is enabled when all sections are completed.

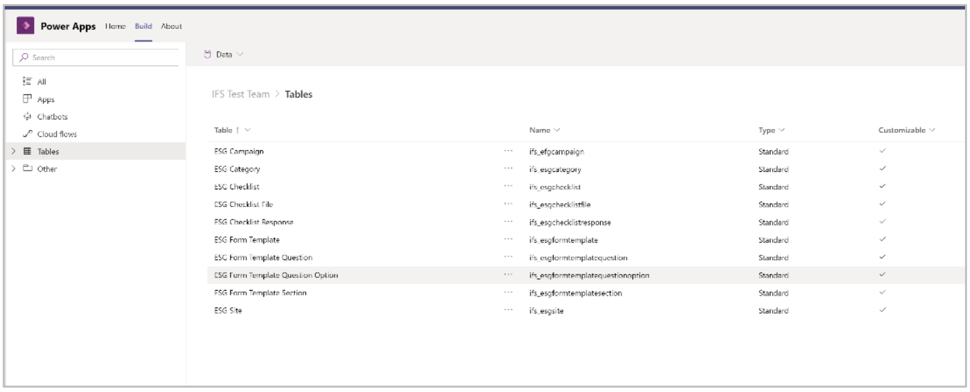


Reporting

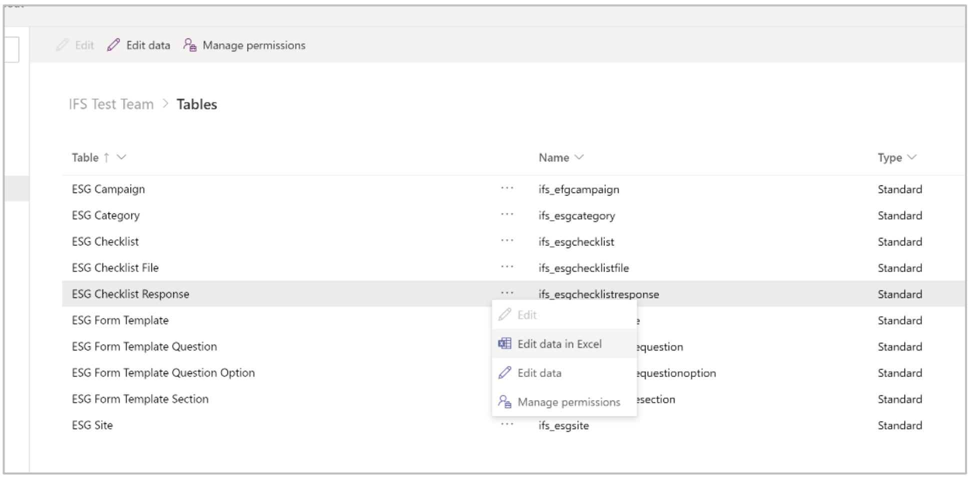
To access the data in Sustainability Planner, you must be an owner of the team in which the app is installed.

Perform the following steps to access the data in the app:

1. In Microsoft Teams, select the … button on the left Teams menu
2. In the **Find an app** field search for **Power Apps**
3. Select the Power Apps app to open the Power Apps studio in Microsoft Teams.
4. Select the **Build** tab
5. Select the team in which the IFS Sustainability Planner app is installed from the Teams list
6. Select **Installed apps**
7. On the IFS Sustainability Planner tile, select **See All**
8. Select the **Tables** tab



9. Select the **Data** button and **Analyze in Power BI** button to connect your environment to Power BI to create reports from the IFS Cloud Sustainability Planner database.
10. If you want to export the data to Excel, select the desired table, select the three dots to the right of the table name, then select **Edit data in Excel.** The selected table will export to Excel.



NOTE: the responses to checklists are stored in the ESG Checklist Response table.

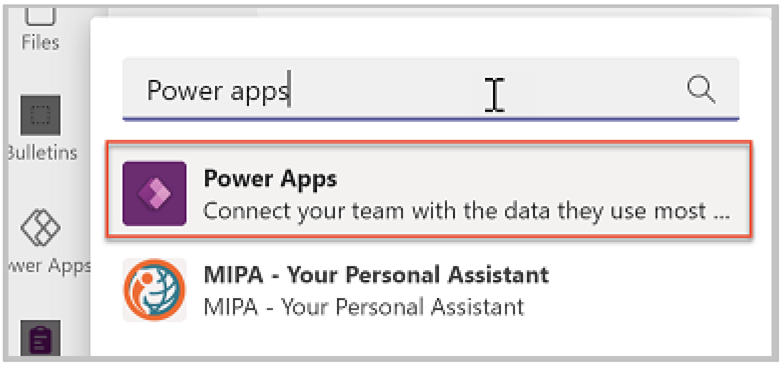
Access

Share Planner Mobile App with Employees Outside of your Team.

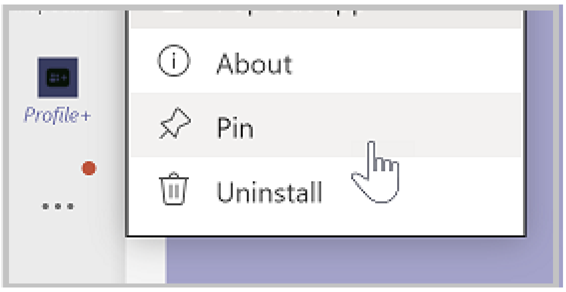
Sharing App with Colleagues

This process begins by opening the app in the Power Apps. You may have Power Apps pinned to your Teams pane.

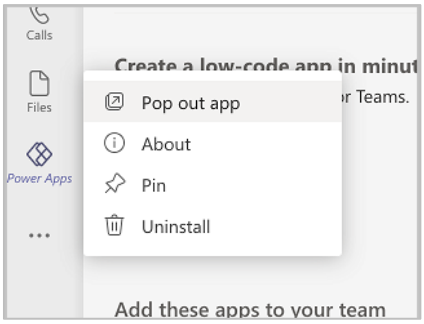
1. In Microsoft Teams, select the … button from the left menu.
2. Type Power Apps in the search field.



3. Select the app from the list to open the app. Power Apps will open in teams.
4. Right-click on the Power Apps logo and select Pin to lock the app to the side menu so it's easy to get to frequently.

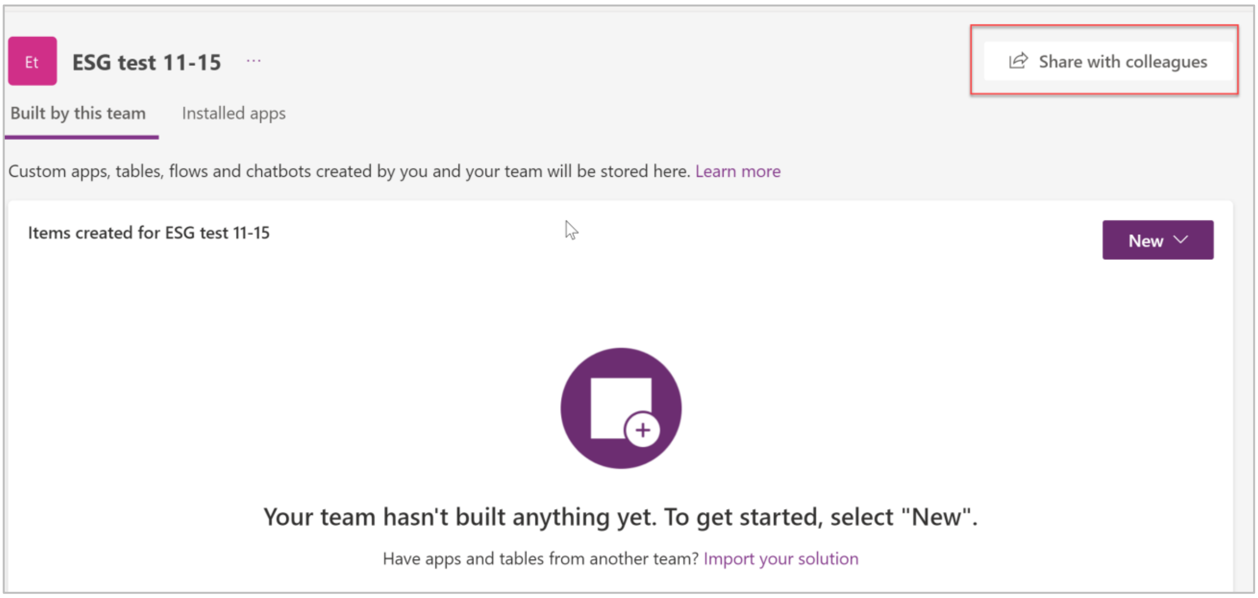


5. We recommended that you “pop out” Power Apps so that if you need to go somewhere else in Microsoft Teams, you won’t lose your app configuration. To pop out the Power Apps app, right-click on the Power Apps logo, and then select **Pop out app**.

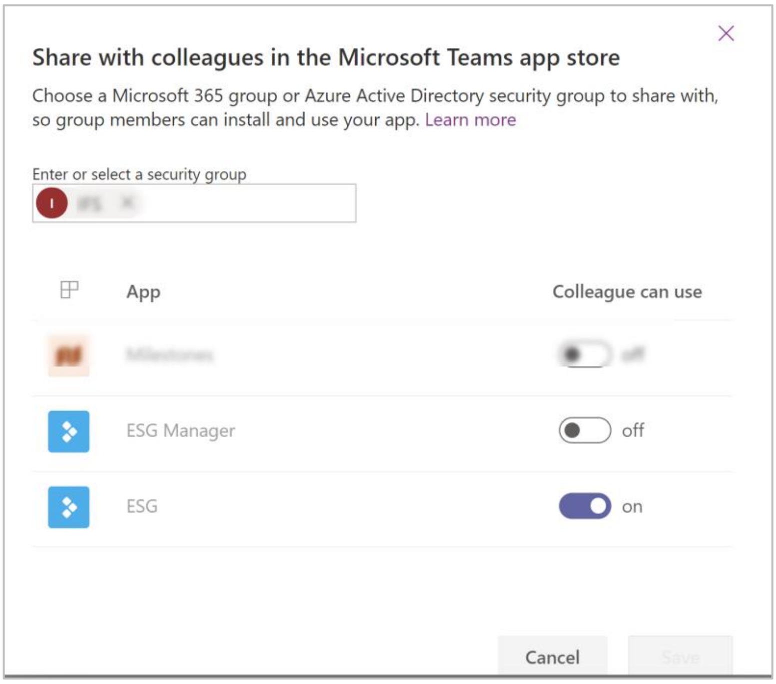


6. Now that you've loaded the Power Apps app, select Build.

7. This screen will show all the teams that have Power Apps installed in them. Select the team that contain the app you want to share. And then, select Share with colleagues.



8. Enter the Azure AD security group, or a different team with which you would like to share access to the app.
9. Set the On/Off toggle to On for Profile+ app



Grant Permission to the Tables

Understanding and assigning permissions to the tables is vital to ensure a proper security of your shared data. Here are the four permissions available for use.

- **Full Access** – Allows end users to see and edit all records in the table.
- **Collaborate** – Allows end users to see all records, but they can only edit their own records.
- **Reference** – Provides a read-only view of data for end users.

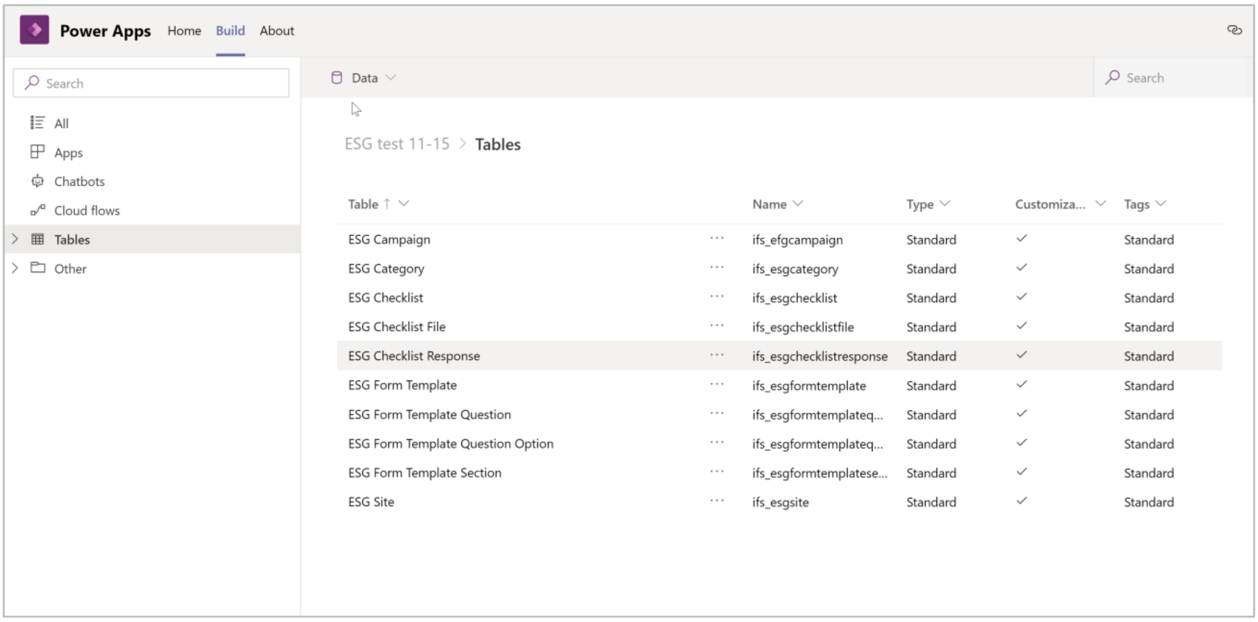
- **Private** – Allows end users to only view and edit their own data.

Configure table permissions

By default, all of the table permissions for colleagues not in the Team are set to None. If you leave it that way, colleagues that you share the app with can't use the app, as they won't have permission to the tables in the app.

Follow these steps to set permissions for the tables in the app for colleagues outside of the team:

1. In Microsoft Teams, open the Power Apps.
2. Select the Build tab.
3. Select the team that contain the app you want to share.
4. Select Installed apps. This option will show all apps installed in the team.
5. Select See all in the Sustainability Planner tile.



6. Select Tables from the solution components bar.
7. Select the tables listed individually, and then select Manage Permissions.
8. Select the security group with which the app was shared. The initial permission will show none. Select the permission you want, and then select Save.
9. Repeat the previous steps for each other table in the app.

The following table lists recommended table permissions:

Table	Permission
ESG Campaign	Since colleagues out of your team should be able to read campaigns but not edit them, you should grant collaborate permissions
ESG Category	Since colleagues out of your team should be able to read categories but not edit them, you should grant collaborate permissions
ESG Checklist	Since colleagues out of your team should be able to read checklists but not edit them, you should grant collaborate permissions
ESG Checklist File	Colleagues outside of your team will need to create files (like documents and photos) but will not need to see other user's records. You should grant Private permission.

ESG Checklist Response	Colleagues outside of your team will need to create responses but will not need to see other user's records. You should grant Private permission.
ESG Form Template	Colleagues outside of your team need to read form templates, but not edit them, so you should grant Collaborate permission
ESG Form Template Question	Colleagues outside of your team do not need access to template questions, so you can leave permission at None.
ESG Form Template Question Option	Colleagues outside of your team need to read question options, but not edit them. So you should grant them collaborate permission.
ESG Form Template Section	Colleagues outside of your team need to read form template sections, but not edit them. So you should grant them collaborate permission.
ESG Site	Colleagues outside of your team need to read sites, but not edit them. So you should grant them collaborate permission.

Rename the App

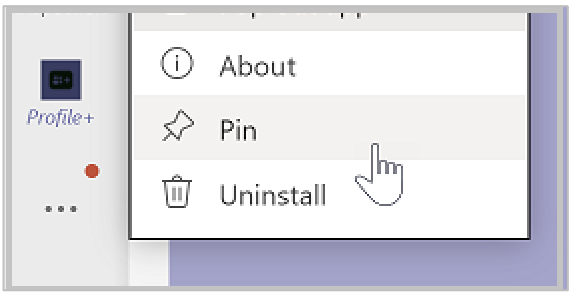
In a large organization, you might have multiple people sharing the same template app with colleagues. If multiple departments are using Profile+ app, you can make it easier for your colleagues to find the app by renaming it.

1. Open Planner Mobile app in Microsoft Teams Power Apps studio.
2. In the upper right corner, select the app name.
3. Enter a new name for the app. For example, "Contoso Sustainability Checklist".
4. Save and publish the app.

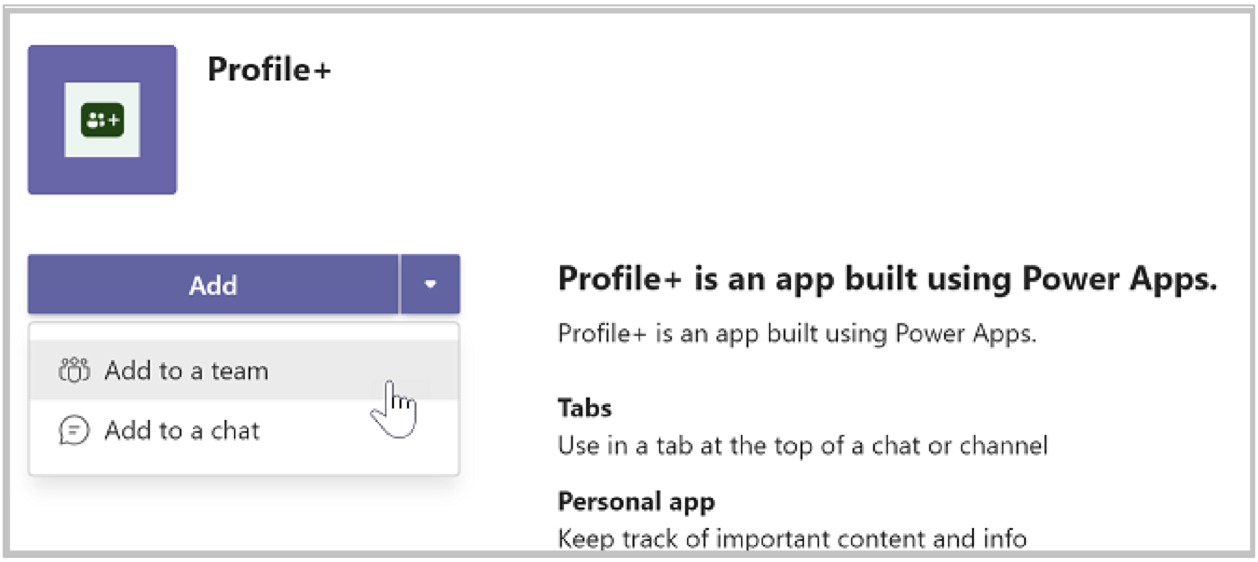
Accessing Shared Apps

The colleagues that the Planner Mobile App is shared with, can acquire the app using the following steps.

1. In Microsoft Teams, select the ellipses (…) button on left pane.
2. Select More apps.
3. Select Built for your org.
4. When the app information screen appears, select Add to add the app to the main teams app menu.
5. After adding the app to the Teams app menu, select the icon for the app to open it full screen in Teams.
6. If you want to make the app always appear in the app menu so you can easily find it, right-click on the PlannerMobile button on the app menu, and then select Pin.



7. If you prefer to add the app to another team, select the drop-down next to the Add button, and then select Add to a team.



Limitations

Currently, Teams apps can only be shared with a single Azure Active Directory group.