

# IFS Cloud Sustainability Planner

## User Instructions



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# 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.

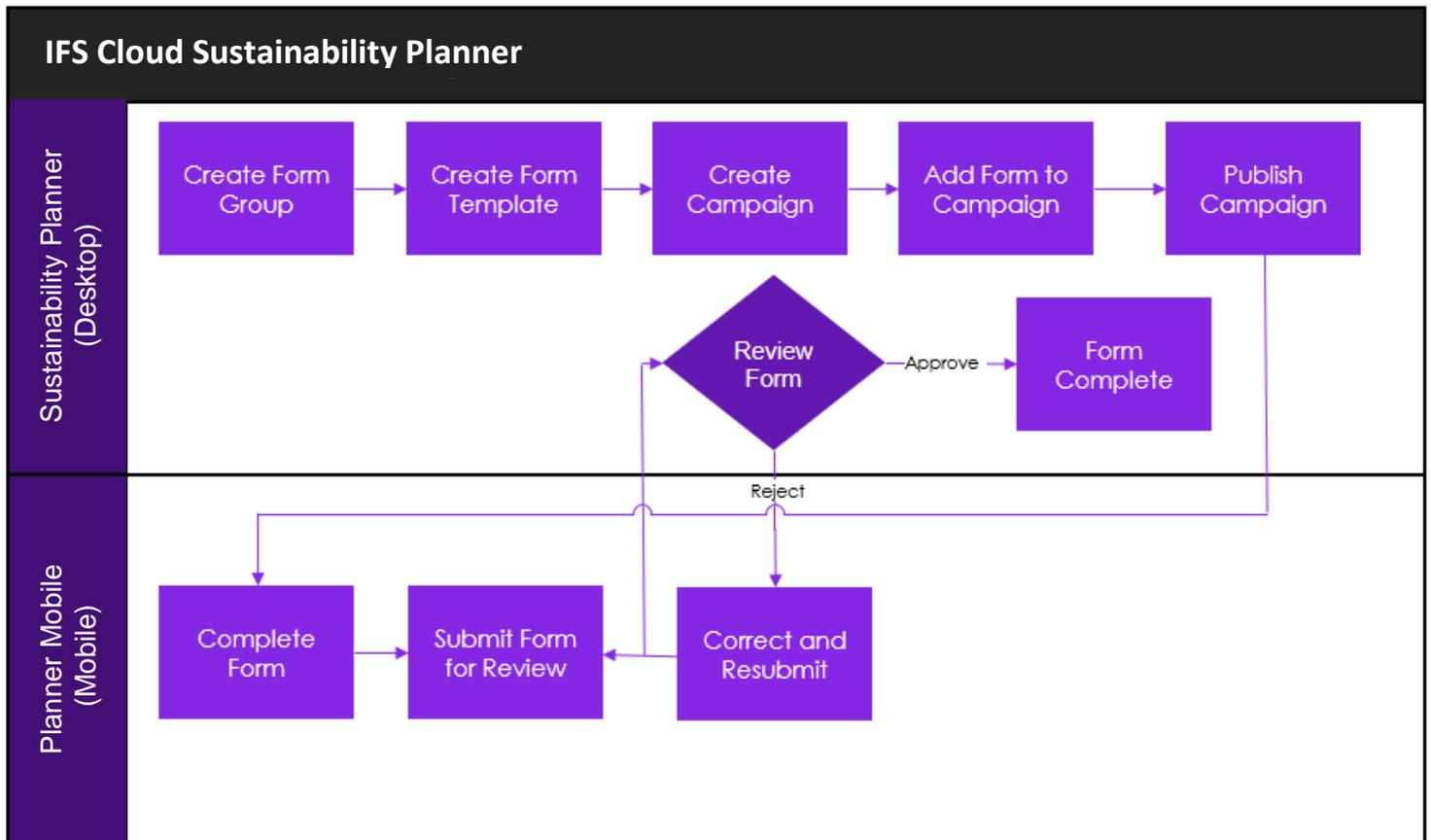


Figure 1: Business Process Diagram

## Setting up the App:

Please follow below steps to setup the application,

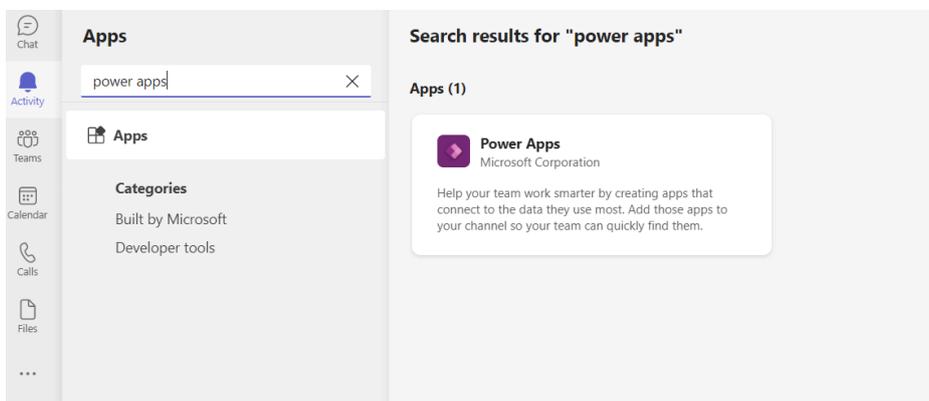
**Step 1:** Search for "IFS Sustainability Planner" in your MS Teams app store and install it

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

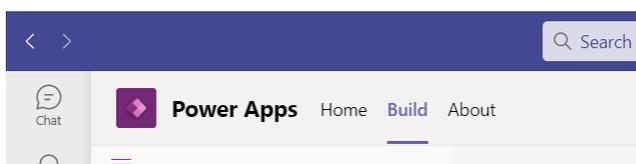
**Step 3:** Once the Desktop app " Sustainability Planner " is installed you can then go back to MS Teams

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

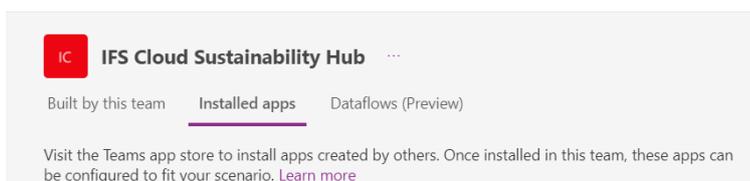
**Step 5:** Search for "Power Apps" in your MS Teams app store and install it



**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.

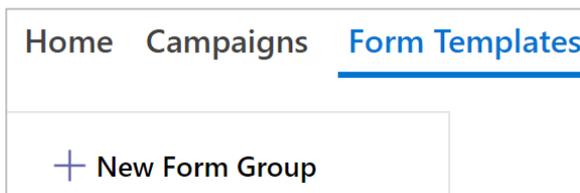
## Create a New Form Group

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

A screenshot of a form titled 'New Form Group'. It has a 'Title' label above a text input field.

4. Click **Save**

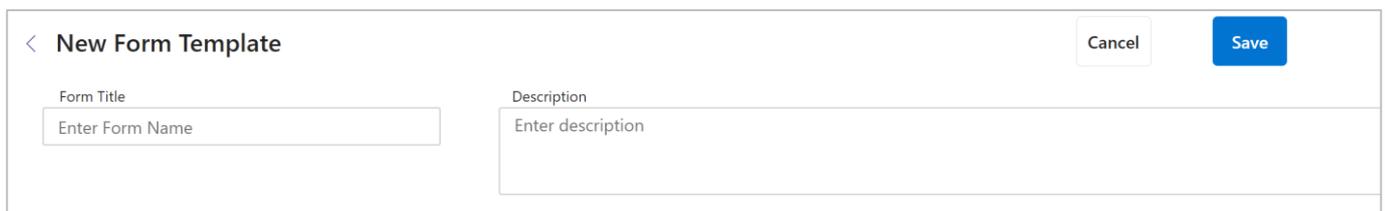
## Create a Form Template

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



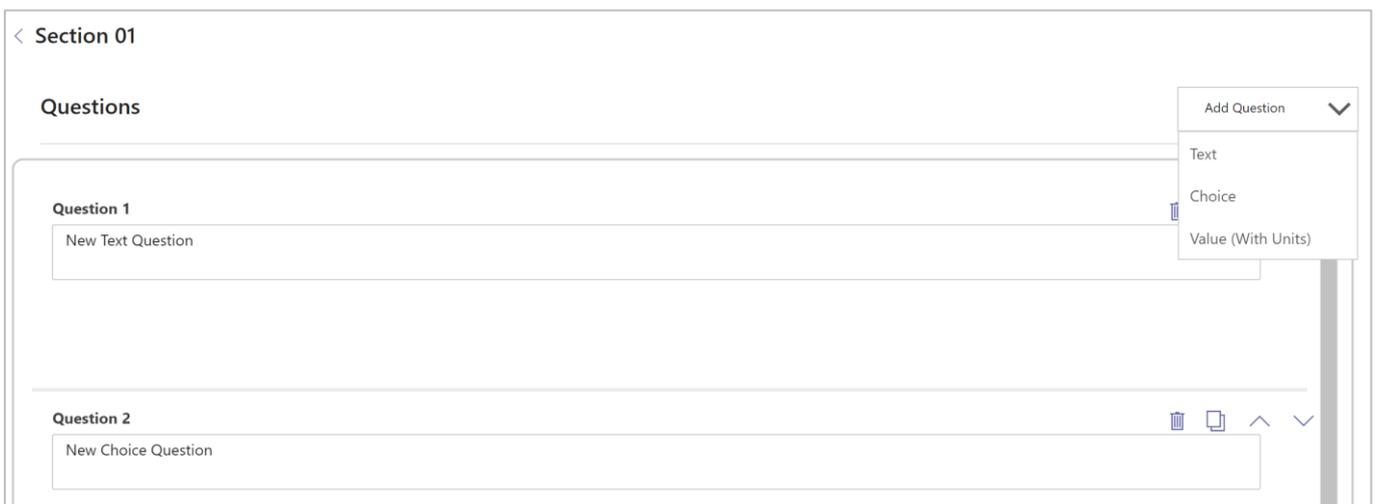
1. Complete the following fields
  - a. Form title
  - b. Description
  - c. Section title

A screenshot of a form titled 'New Form Template'. It has a back arrow on the left, 'Cancel' and 'Save' buttons on the right. There are two input fields: 'Form Title' with the placeholder 'Enter Form Name' and 'Description' with the placeholder 'Enter description'.

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

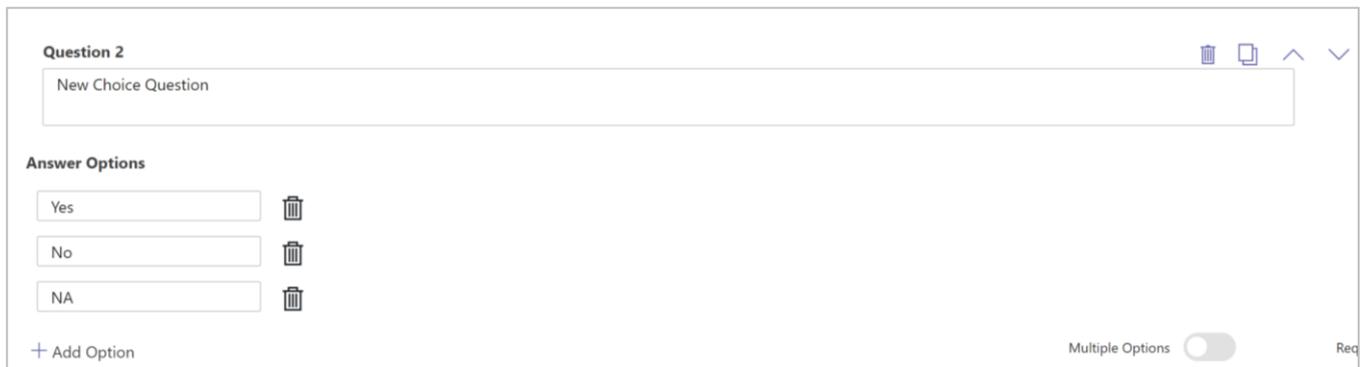


3. Click the up or down icon to reorder a section, question, or option



## Adding Options

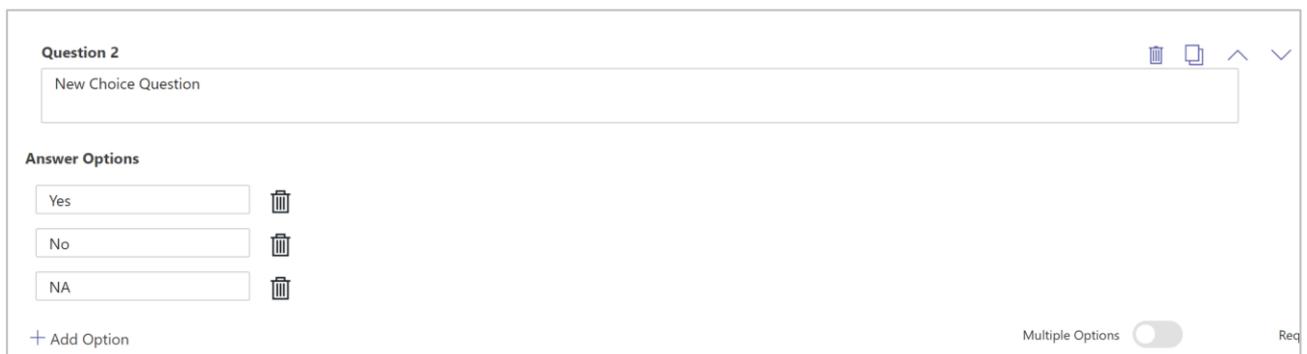
For the choice question, click **Add Option** to add additional options.



The screenshot shows a form editor for 'Question 2'. At the top, there is a text input field containing 'New Choice Question'. Below this, under the heading 'Answer Options', there are three input fields: 'Yes', 'No', and 'NA'. Each input field has a trash icon to its right. At the bottom left, there is a '+ Add Option' button. At the bottom right, there is a 'Multiple Options' toggle switch, which is currently turned off. The word 'Req' is partially visible at the bottom right corner.

## 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.

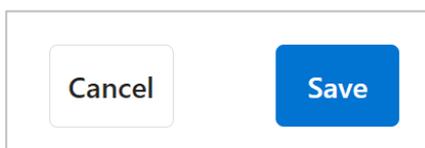


This screenshot is identical to the previous one, but the 'Multiple Options' toggle switch is now turned on.

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.

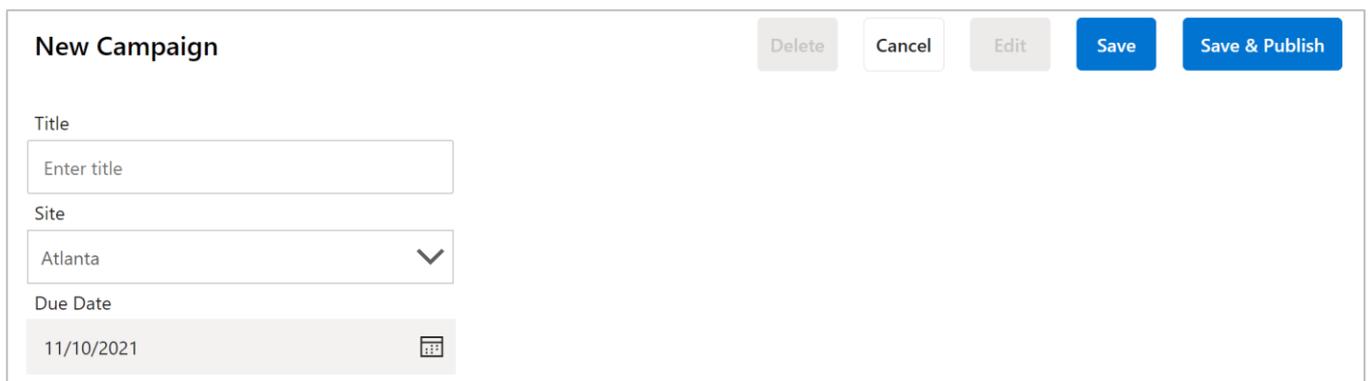
1. Click the **Campaign** tab



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



**New Campaign** Delete Cancel Edit Save Save & Publish

Title

Site  
 ▼

Due Date  
 

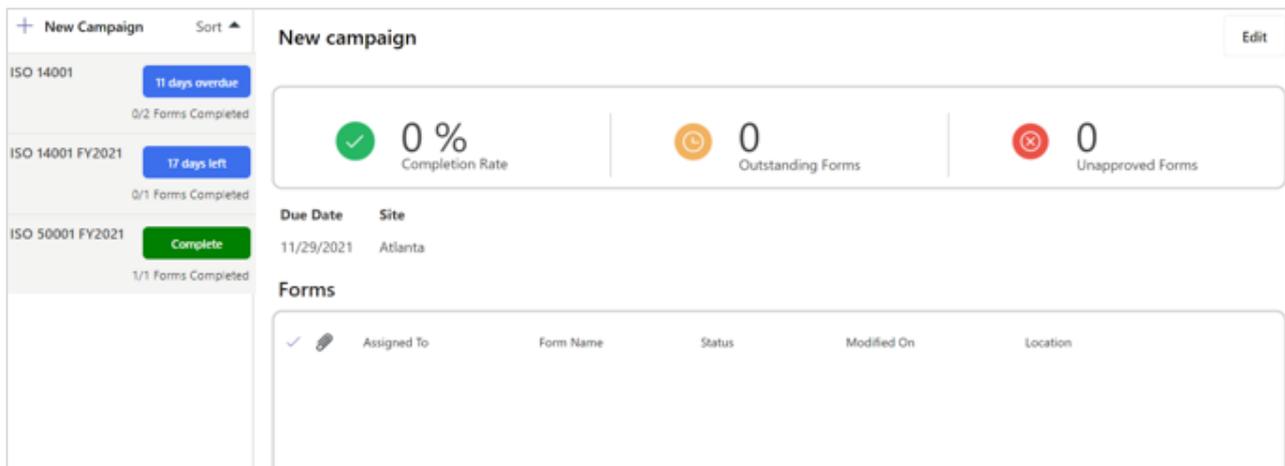
4. The campaign displays in the left pane

|                  |                 |                     |
|------------------|-----------------|---------------------|
| ISO 14001        | 11 days overdue | 0/2 Forms Completed |
| ISO 14001 FY2021 | 17 days left    | 0/1 Forms Completed |
| ISO 50001 FY2021 | Complete        | 1/1 Forms Completed |

## Add a Form

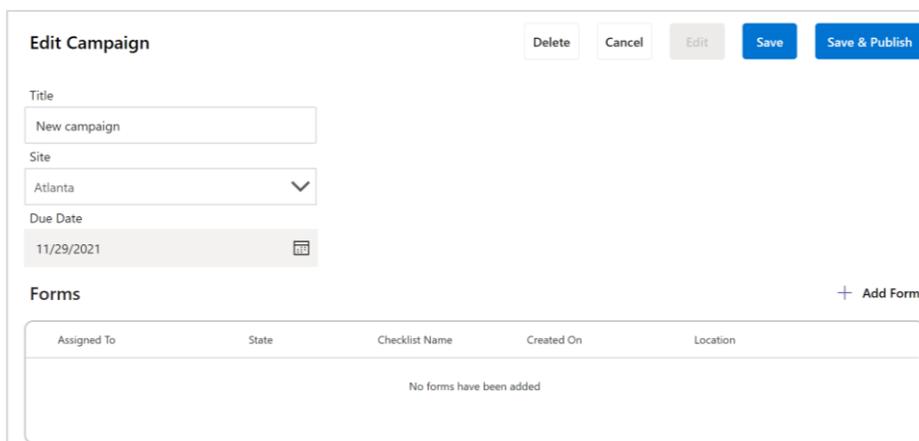
In this section we detail how to create forms associated with a campaign.

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



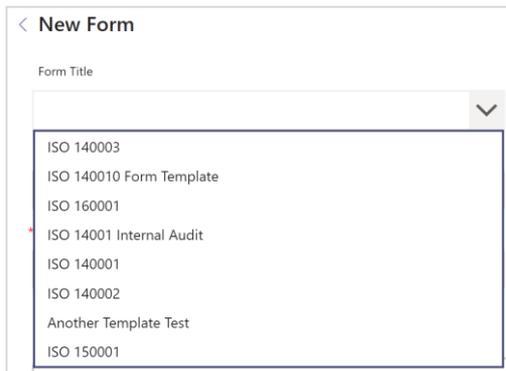
The screenshot shows the 'New Campaign' interface. On the left, there is a list of campaigns: ISO 14001 (11 days overdue, 0/2 Forms Completed), ISO 14001 FY2021 (17 days left, 0/1 Forms Completed), and ISO 50001 FY2021 (Complete, 1/1 Forms Completed). The main area displays 'New campaign' details: 0% Completion Rate, 0 Outstanding Forms, and 0 Unapproved Forms. Below this, the 'Due Date' is 11/29/2021 and the 'Site' is Atlanta. A 'Forms' table is shown with columns: Assigned To, Form Name, Status, Modified On, and Location. The table is currently empty.

3. Click **Add Form**



The screenshot shows the 'Edit Campaign' form. At the top right, there are buttons for Delete, Cancel, Edit, Save, and Save & Publish. The form fields are: Title (New campaign), Site (Atlanta), and Due Date (11/29/2021). Below the form fields, there is a 'Forms' section with a '+ Add Form' button. The forms table has columns: Assigned To, State, Checklist Name, Created On, and Location. The table is currently empty with the message 'No forms have been added'.

- Click the form drop down and select a form template



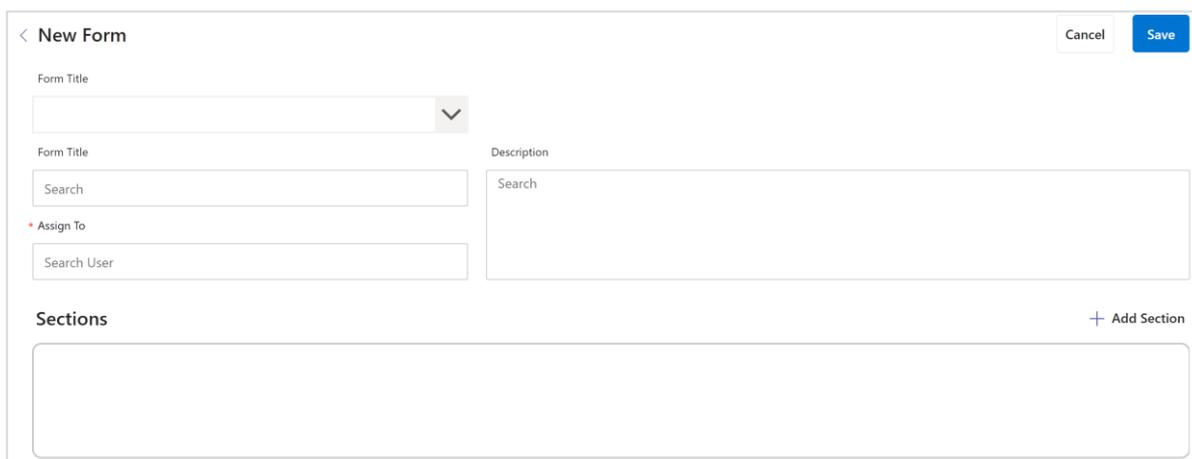
The screenshot shows a 'New Form' screen with a 'Form Title' dropdown menu. The dropdown is open, displaying a list of form templates: ISO 140003, ISO 140010 Form Template, ISO 160001, ISO 14001 Internal Audit, ISO 140001, ISO 140002, Another Template Test, and ISO 150001.

**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.

- 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.

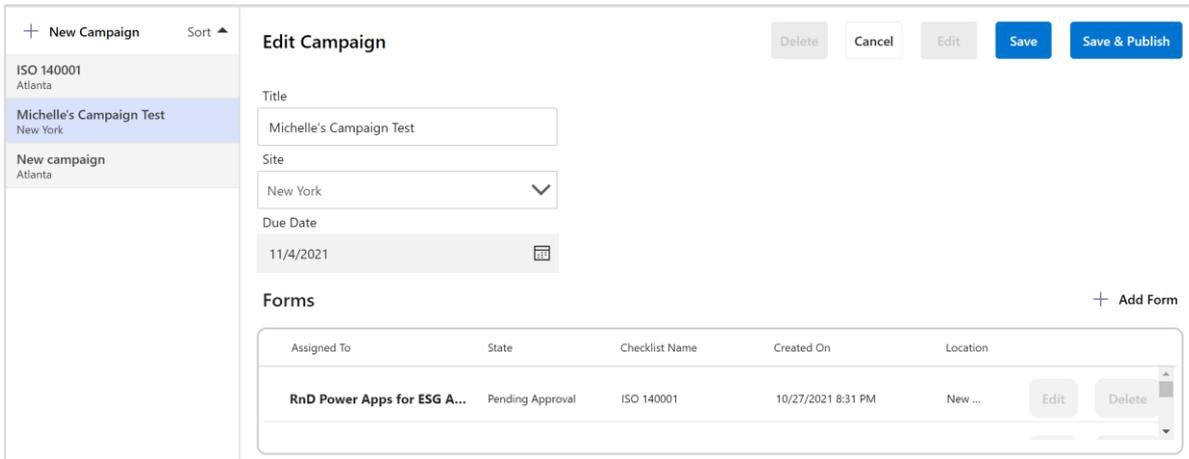
- If you wish to add additional sections to the form, you can select the **Add section** button to add additional sections.
- Edit a section question and navigate back to the section, if applicable



The screenshot shows the 'New Form' screen with the following fields and buttons:

- Form Title:** A dropdown menu with a search field and a list of templates.
- Description:** A text input field with a search field.
- Assign To:** A text input field with a search field.
- Sections:** A large empty text area with a '+ Add Section' button.
- Buttons:** 'Cancel' and 'Save' buttons in the top right corner.

- Click **Save**
- The campaign screen and forms display



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

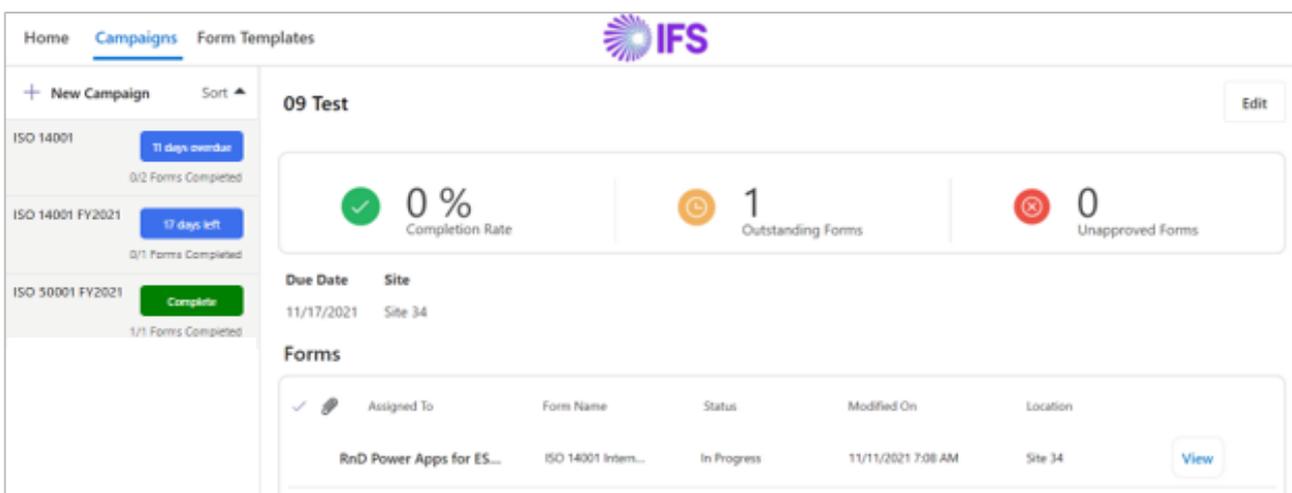
11. Once all of the forms have been added to the campaign, select **Save & Publish**.

**NOTE:** 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).

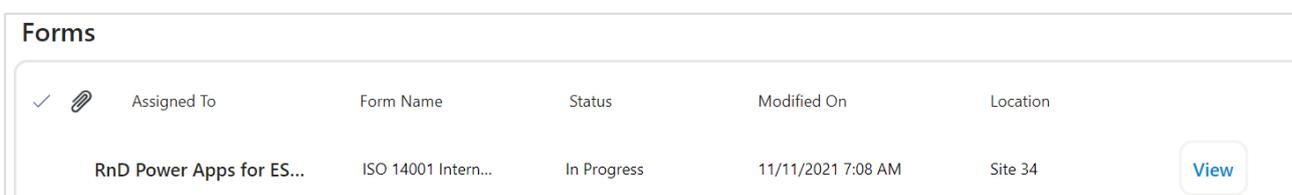
## Campaign Review and Approval

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.

< **General Requirements**

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**Question 1**

Has the organization established and maintained an environmental management system consistent with the requirements contained in ISO 14001?

**Feedback**

Add Feedback

---

**Additional Details**

View attachment

---

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

< **Forms**

| Description              | Submitted By                              | Modified On        |
|--------------------------|---|--------------------|
| ISO 14001 Internal Audit | RnD Power Apps for ESG ApplicationService | 11/11/2021 7:08 AM |
|                          | Location                                  |                    |
|                          | Site 34                                   |                    |

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.

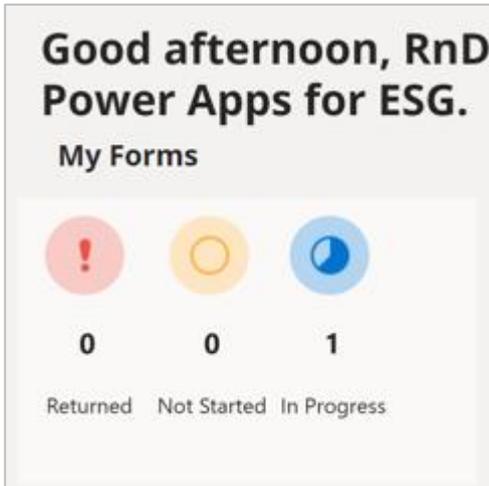
1. Navigate to the team in which the app is installed.
2. Click the **Planner Mobile** tab

**General**
Posts
Files
Wiki
Sustainability Hub
Sustainability App ▾

## 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

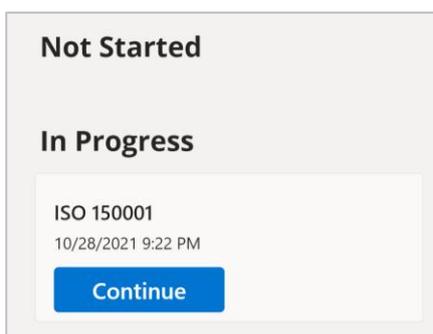


## Completing a Form

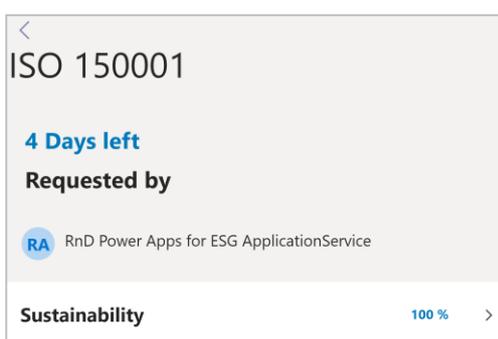
A form is created by the user of the Sustainability Planner desktop app and is the method used to gather information. The user of Planner Mobile App answers the questions on the forms.

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

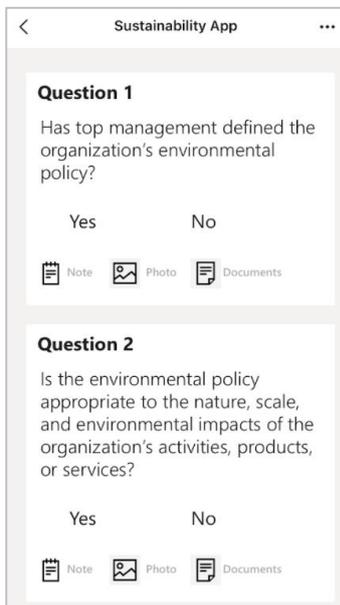
1. Click **Continue** on a form listed under Not Started, In Progress or Unapproved Forms



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.



**Sustainability App**

**Question 1**  
Has top management defined the organization's environmental policy?

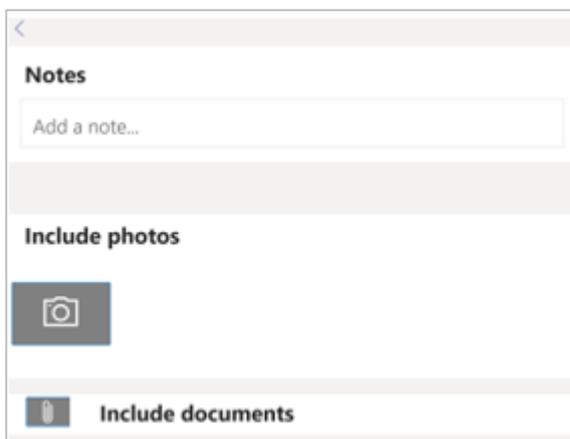
Yes      No

Note   Photo   Documents

**Question 2**  
Is the environmental policy appropriate to the nature, scale, and environmental impacts of the organization's activities, products, or services?

Yes      No

Note   Photo   Documents



**Notes**

Add a note...

**Include photos**

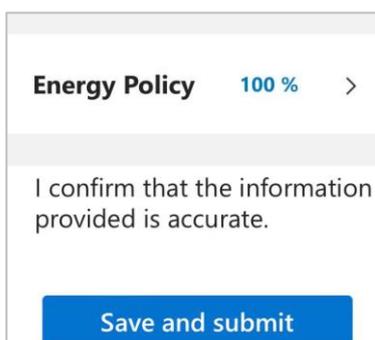
📷

📄 **Include documents**

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.



**Energy Policy**    100 %    >

I confirm that the information provided is accurate.

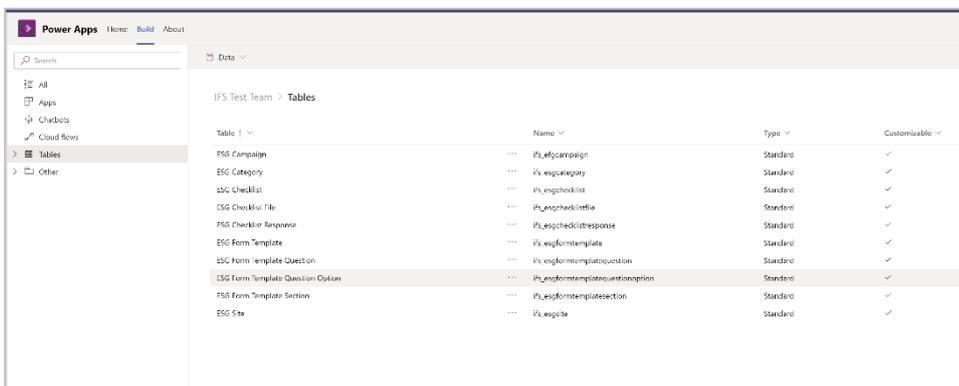
**Save and submit**

# Reporting

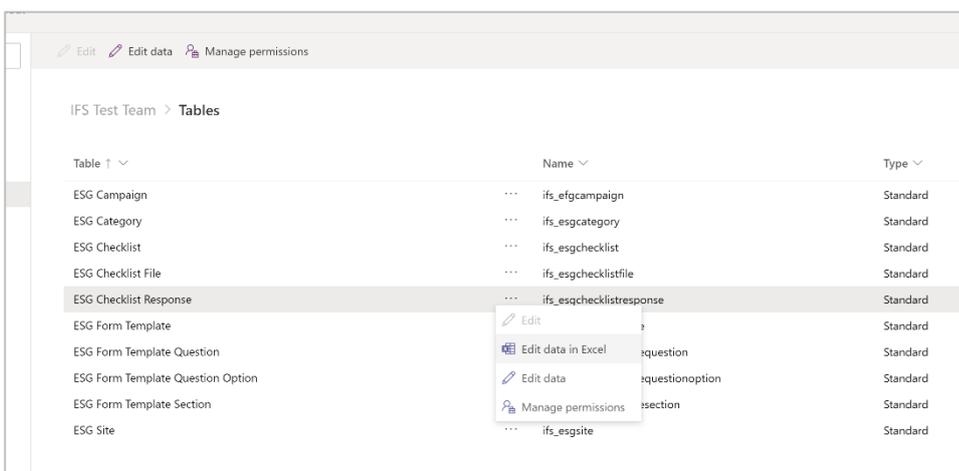
To access the data in Sustainability Planner, you must be an owner of the team in which the app is installed.

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.

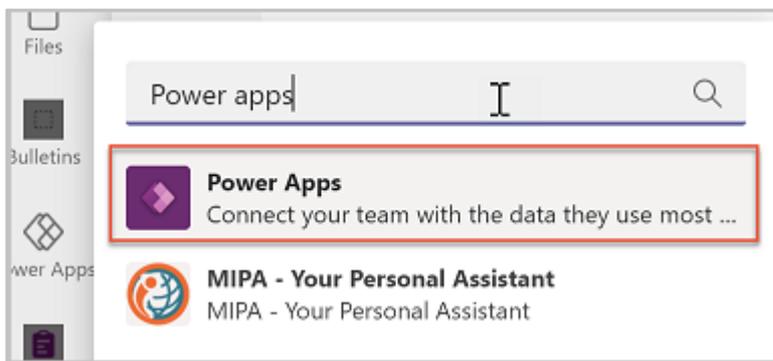
## Access

### Share Planner Mobile App with Employees Outside of your Team.

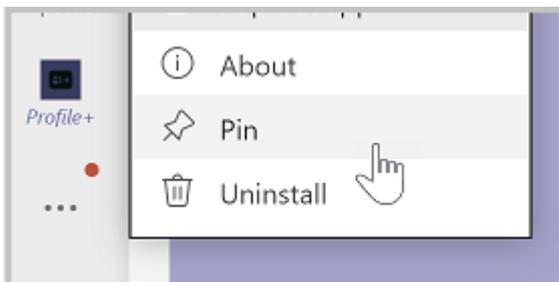
#### Sharing App with Colleagues

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

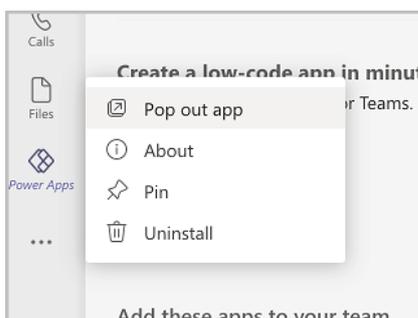
1. In Microsoft Teams, select the ... button from the left menu.
2. Type Power Apps in the search field.



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.

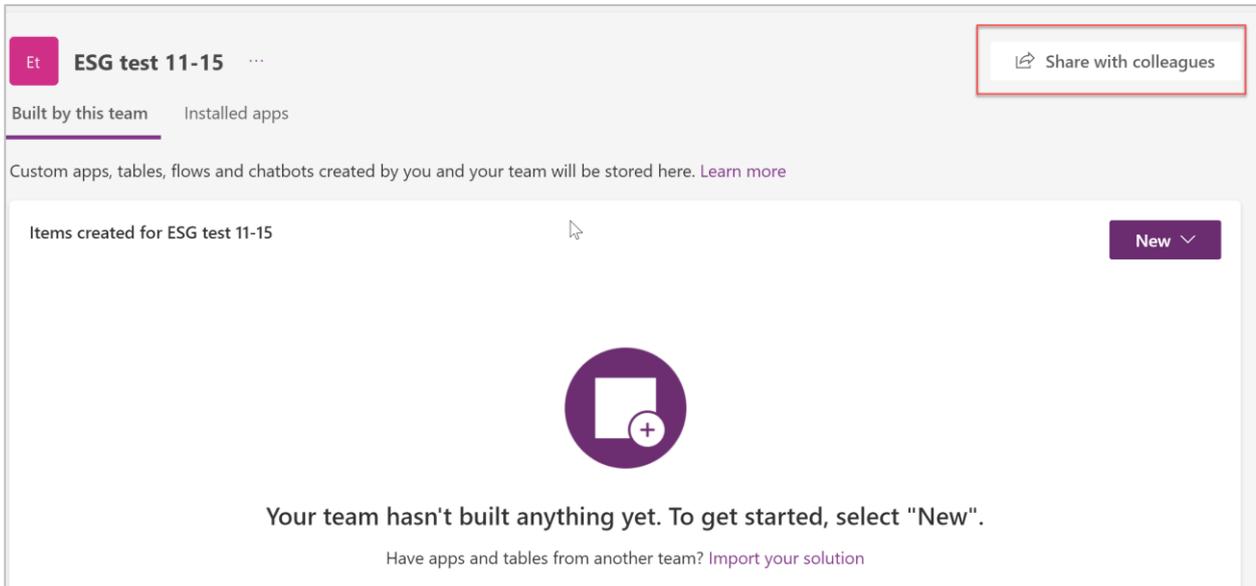


5. We recommended that you “pop out” Power Apps so that if you need to go somewhere else in Microsoft Teams, you won’t lose your app configuration. To pop out the Power Apps app, right-click on the Power Apps logo, and then select **Pop out app**.

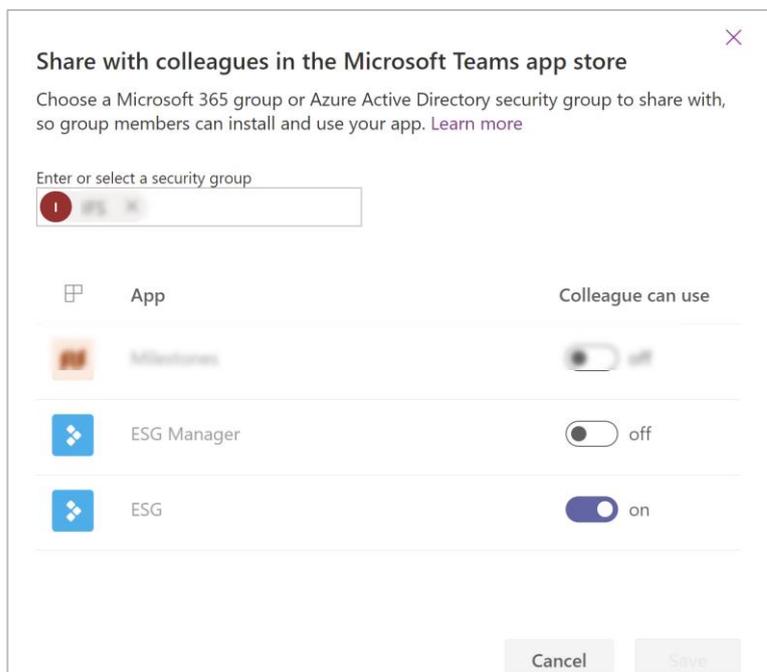


6. Now that you've loaded the Power Apps app, select Build.

- 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.



- Enter the Azure AD security group, or a different team with which you would like to share access to the app.
- 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.

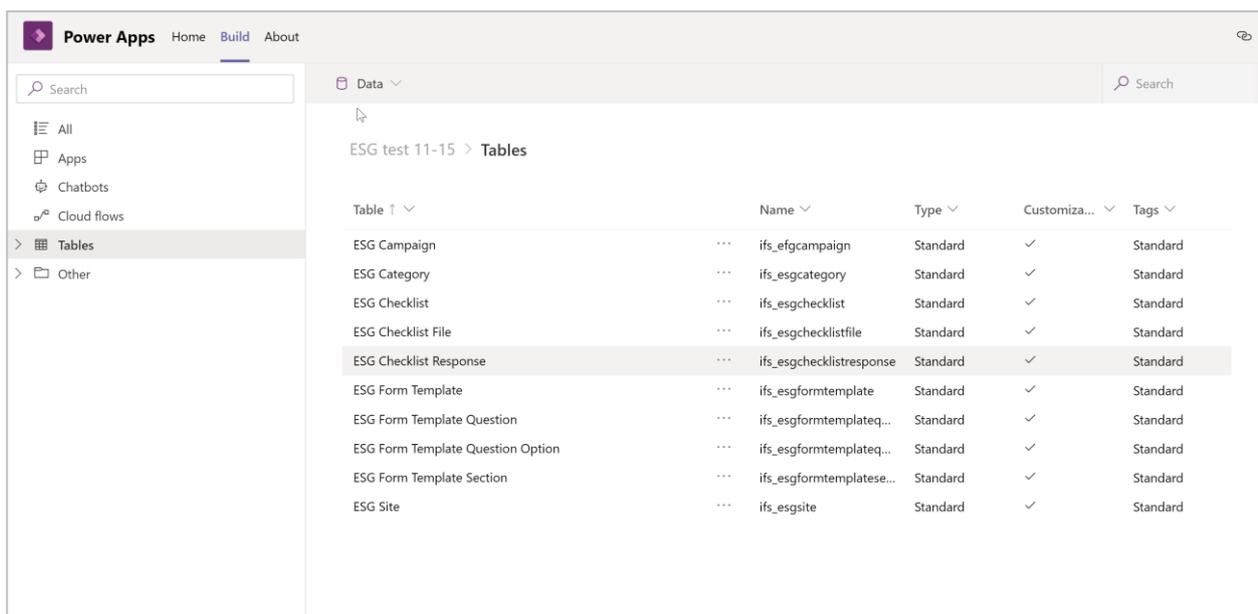
- **Private** – Allows end users to only view and edit their own data.

## 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  |
|---------------------------|---|
| <b>ESG Campaign</b>       | Since colleagues out of your team should be able to read campaigns but not edit them, you should grant collaborate permissions  |
| <b>ESG Category</b>       | Since colleagues out of your team should be able to read categories but not edit them, you should grant collaborate permissions   |
| <b>ESG Checklist</b>      | Since colleagues out of your team should be able to read checklists but not edit them, you should grant collaborate permissions   |
| <b>ESG Checklist File</b> | 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. |

|  |   |
|--|---|
| <b>ESG Checklist Response</b>            | 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. |
| <b>ESG Form Template</b>                 | Colleagues outside of your team need to read form templates, but not edit them, so you should grant Collaborate permission                        |
| <b>ESG Form Template Question</b>        | Colleagues outside of your team do not need access to template questions, so you can leave permission at None.                                    |
| <b>ESG Form Template Question Option</b> | Colleagues outside of your team need to read question options, but not edit them. So you should grant them collaborate permission.                |
| <b>ESG Form Template Section</b>         | Colleagues outside of your team need to read form template sections, but not edit them. So you should grant them collaborate permission.          |
| <b>ESG Site</b>                          | Colleagues outside of your team need to read sites, but not edit them. So you should grant them collaborate permission.                           |

## Rename the App

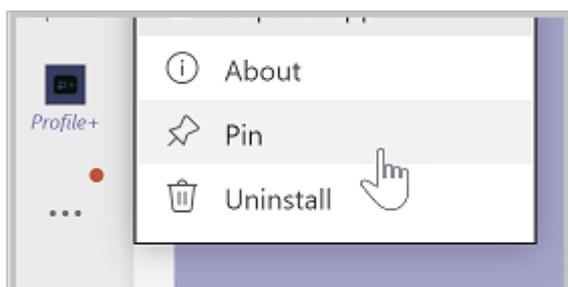
In a large organization, you might have multiple people sharing the same template app with colleagues. If multiple departments are using Profile+ app, you can make it easier for your colleagues to find the app by renaming it.

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.

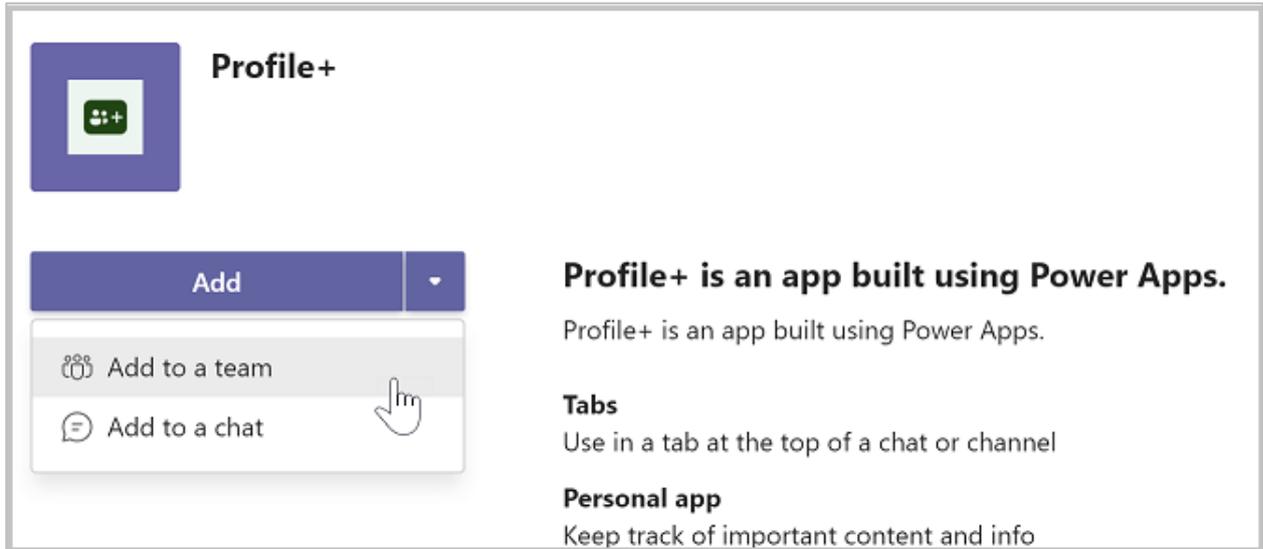
## Accessing Shared Apps

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.



**Profile+**

**Add**

- Add to a team
- Add to a chat

**Profile+ is an app built using Power Apps.**  
Profile+ is an app built using Power Apps.

**Tabs**  
Use in a tab at the top of a chat or channel

**Personal app**  
Keep track of important content and info

## Limitations

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