onestream

ESG Reporting and Planning Guide

PV9.0.0 SV100

Table of Contents

Overview

The ESG Reporting and Planning solution streamlines Environmental, Social, and Governance reporting and enables planning and measurement against corporate goals.

With ESG Reporting and Planning, you can:

- Ingest and maintain key frameworks, starting with the ESRS (European Sustainability Reporting Standards), as well as the ability to add your own frameworks and KPIs.
- Leverage the solution's starting data model, based on the ESRS framework, that is already linked to the Framework KPIs.
- Enhance the data model through control lists, which can be based on existing OneStream Dimensionality.
- Ingest and maintain over 200,000 emission factors into the solution from a variety of sources, as well as the ability to add your own.
- Calculate CO2e for Scope 1, 2, and 3.
- Leverage factors and frameworks to build dynamic data collection interfaces for the end user.
- Collect data at a Unit of Measurement or currency and easily translate and convert.
- Start your compliance journey with the solution's pre-built ESRS report.
- Connect your emission and definition data to cubes for planning and reporting.

Setup and Installation

This section contains important details related to the planning, configuring, and installation of your solution. Before you install the solution, familiarize yourself with these details.

Dependencies

Ensure that you have each of the following components installed:

Component	Description
9.0.0	Minimum Platform release required to install this release.

Select the ESG Reporting and Planning Development Location

Before installation, decide whether to build the solution directly in the Production OneStream application or in a separate Development OneStream application. This section provides some key considerations for each option.

Production OneStream Application: The primary advantage of building the solution in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and it is not advised.

> **NOTE:** OneStream strongly recommends that you implement the solution in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a best practice, use the Development OneStream application to build the solution.

Create the OneStream Development Location

1. Ensure all the OneStream artifacts relating to ESG Reporting and Planning such as Workflow Profiles and entities, are in the Production application.
2. Create a backup copy of your Production database, or copy your Production OneStream application to your Development environment and rename it. This Development version will be used for your ESG Reporting and Planning project.

Application Server Settings

You may need to edit the OneStream Application Server Configuration so users can create and change data in the additional database tables. If other OneStream Solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

See Solution Database Migration Advice.

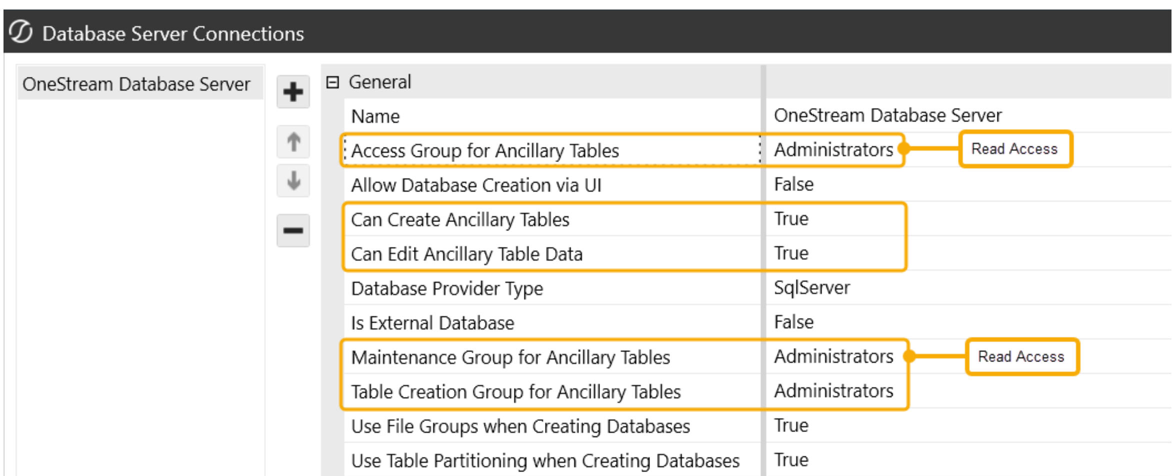
Configure the OneStream Application Server

Be sure that the security group settings include the users who work on and set up the solution before proceeding.

NOTE: Group settings are applicable to all OneStream Solutions; it is important to keep the group names generic.

1. Start the OneStream Server Configuration Utility as an Administrator.
2. Click **Open Application Server Configuration File > Database**.
3. Edit the following **OneStream Database Server properties**:

- **Access Group for Ancillary Tables**: Select a group that includes those who will access records.
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True
- **Maintenance Group for Ancillary Tables**: Select a group to edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

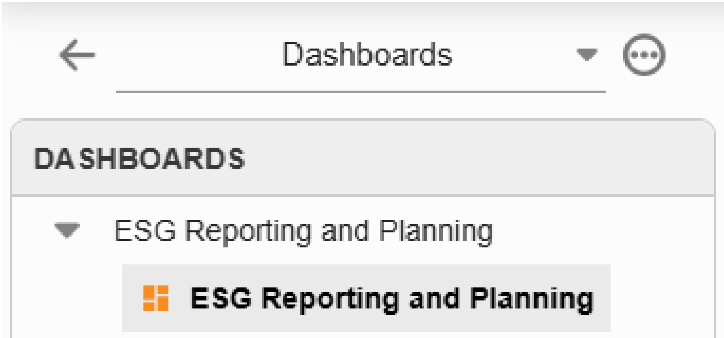
Install ESG Reporting and Planning

The ESG Reporting and Planning solution is a paid offering. Once you have completed the purchase, complete the following steps to install the solution:

1. In **OneStream Solution Exchange**, go to **OneStream Solutions** and select the **ESG Reporting and Planning** tile.
2. On the **ESG Reporting and Planning** page, in the **Platform Version** drop-down menu, select the appropriate OneStream Platform Version.
3. In the **Solution Version** drop-down menu, select the most recent version.
4. Click the **Download** button.
5. Log in to OneStream.
6. On the **Application** tab, go to **Tools** > **Load/Extract**.
7. On the **Load** tab, use the **Select File** button to locate the solution package.
8. Click the **Open** button.
9. When the solution file name displays, click the **Load** button.
10. Click the **Close** button to complete the installation.

Set Up ESG Reporting and Planning

The first time you run the solution, you are guided through the table setup process. In the OneStream Modern Browser Experience, click **Dashboards** > **ESG Reporting and Planning** >**ESG Reporting and Planning**.



Create Tables

1. Click **Step 1: Setup Tables**. All tables are prefixed with XFW_ESG. For a complete list of tables and package contents, see Appendix C: Tables and Package Contents.

   This step may be necessary when upgrading even if tables already exist. ESG Reporting and Planning does not drop any tables that already exist but modifies table structures and adds new ones if necessary.

2. When setup is complete, click **Step 2: Launch Solution** to open the solution.

Package Contents

The ESG Reporting and Planning Workspace and Dashboard Maintenance Unit provides the user interface for the solution and includes the required dashboard groups, components, data adapters, parameters, and files. See Appendix C: Tables and Package Contents.

Settings

Select the hamburger menu to navigate to the Settings tab.

> **IMPORTANT:** The Settings tab is only accessible to OneStream System Administrators and Solution Administrators. See Global Options.

Use the Settings tab to access the following pages:

- Global Options
- Control Lists
- Access
- Contracts
- Units of Measure
- Scope
- Uninstall
- Integration

Global Options

The Global Options page enables Administrators to configure the functionality of the solution for users. It is used in the initial setup and configuration of the solution.

Field	Description
ESG Solution Administrator	Responsible for the setup and management of the ESG Reporting and Planning solution. If you don't have access to this property and are not a OneStream System Administrator, you will not see the Administration, Reports, and Settings pages.
Reporting Currency	The currency type used as the target currency for reports that translate values.
FX Rate	Used to translate any user entry for spend based factors. To set up and manage FX Rates, see "Foreign Exchange Rates" in the *Design and Reference Guide*.
Cube	Select a cube to drive the entity member selections and data loading.
Control List Scenario Type	Select which Scenario Type will be used to populate dimensional control lists. This field defaults to (Default). See Control Lists.
Fiscal Year is First Period's Calendar Year	Displays if the Time Profile assigned to the cube has the Fiscal Year Start Date property set to something other than January 1st. Your selection determines which factors are used. By selecting True, factors from the fiscal year's first period calendar year are used. By selecting False, factors from the fiscal year's last period calendar year are used.

Field	Description
	NOTE: Fiscal years are finalized when a profile is approved. If a fiscal year selection is modified after a profile is approved, you need to reopen the affected profile and re-approve it. This updates the profile to the most recent fiscal year setting. See Profiles and Profile Management.
Baseline	Select a baseline year as a historic point of reference.
Milestone	You can multi-select a maximum of five milestone years. The default values are 2025, 2030, and 2050. The milestone years will display on the report in the same order as entered in this field. See Report Structure.
Milestone Scenario	Use the **Select Member** window to select a milestone scenario to support target setting and milestone variance reporting. Set up scenarios in your Workflow Profile for the milestone year associated with the cube. You must have a cube selected before you can select a milestone scenario.

When you have selected an option for each field, click the **Save** button.

Control Lists

The Control Lists page enables Administrators to manage, create, and import control lists. Control lists allow users to add extensible attributes to definitions and factor groups. Use control lists when the data points you are collecting on go beyond the basic scope of the definition or factor group, for example, product or vendor. Control lists can be determined by a dimension member, or Administrators can create custom lists.

The Administrator can assign control lists to definitions and factor groups from the Definitions and Factor Groups pages. See Definitions and Factor Groups. A maximum of four control lists can be assigned to each definition, and only one control list can be assigned to each factor group. Control lists display as drop-down menus when the user completes data entry tasks on the Home page, enabling users to add an entry for each control list member. See Home. For information on how control lists display as columns in a report, see Reports.

Manage Control Lists

To add a control list, complete the following steps:

1. In the **Control Lists** grid, click the **Insert Row** button.
2. Enter a **Name** and **Description**.

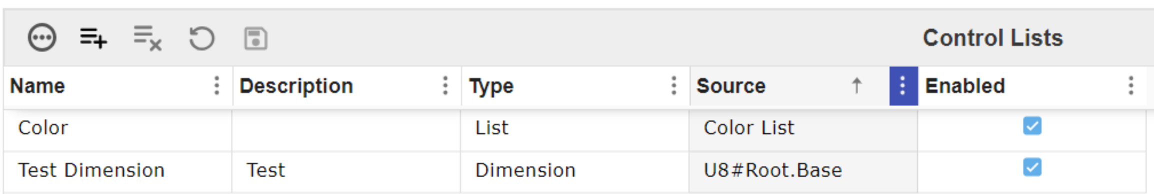
   > **NOTE:** The name must be unique.

3. The Type drop-down menu defaults to List. You must add members for a List Type control list. To pull control members from a dimension, click the **Type** drop-down menu and select **Dimension**.
4. Control list **Source** field:
   - **List Type**: It is recommended to leave this field blank. When the control list entry is saved, the field automatically populates with the list Name.
   - **Dimension Type**: Enter a valid Member Filter in the field.

> **NOTE:** Member Filters are applied to the cube and Control List Scenario Type set in Global Options. See [Global Options].

5. The Enabled checkbox is selected by default. Clear the **Enabled** checkbox to disable a control list.

6. Click the **Save** button.



Manage Control List Members

> **NOTE:** You can only manage members for control lists with a List Type.

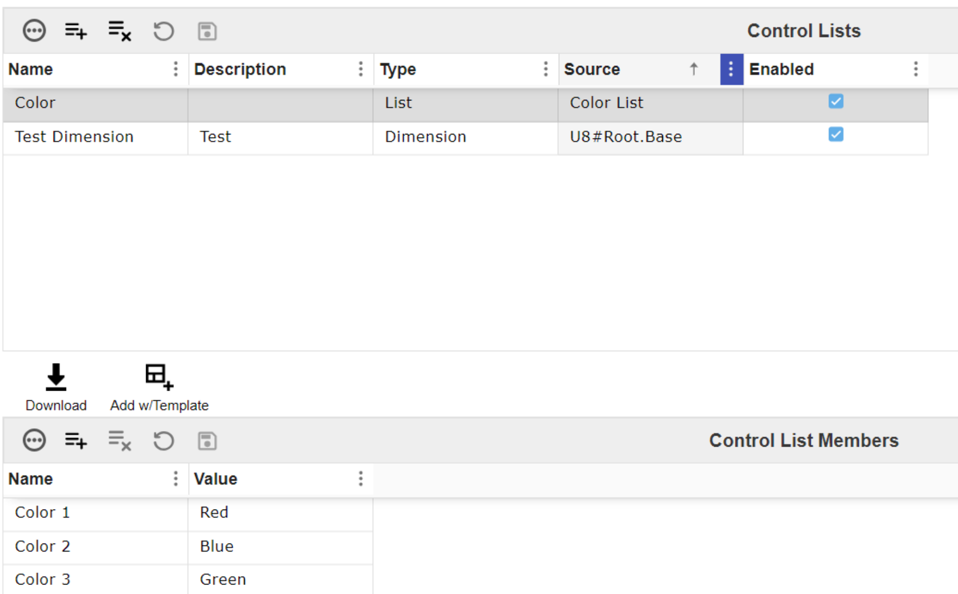
To manage List Type control list members, select the control list from the **Control List** grid, and the members will display in the **Control List Members** grid below. You can individually add control list members using the Control List Members grid, or you can download the Excel import template and import control list members.

To add control list members, complete the following steps:

1. In the **Control List Members** grid, click the **Insert Row** button.
2. Enter a **Name** and **Value**.

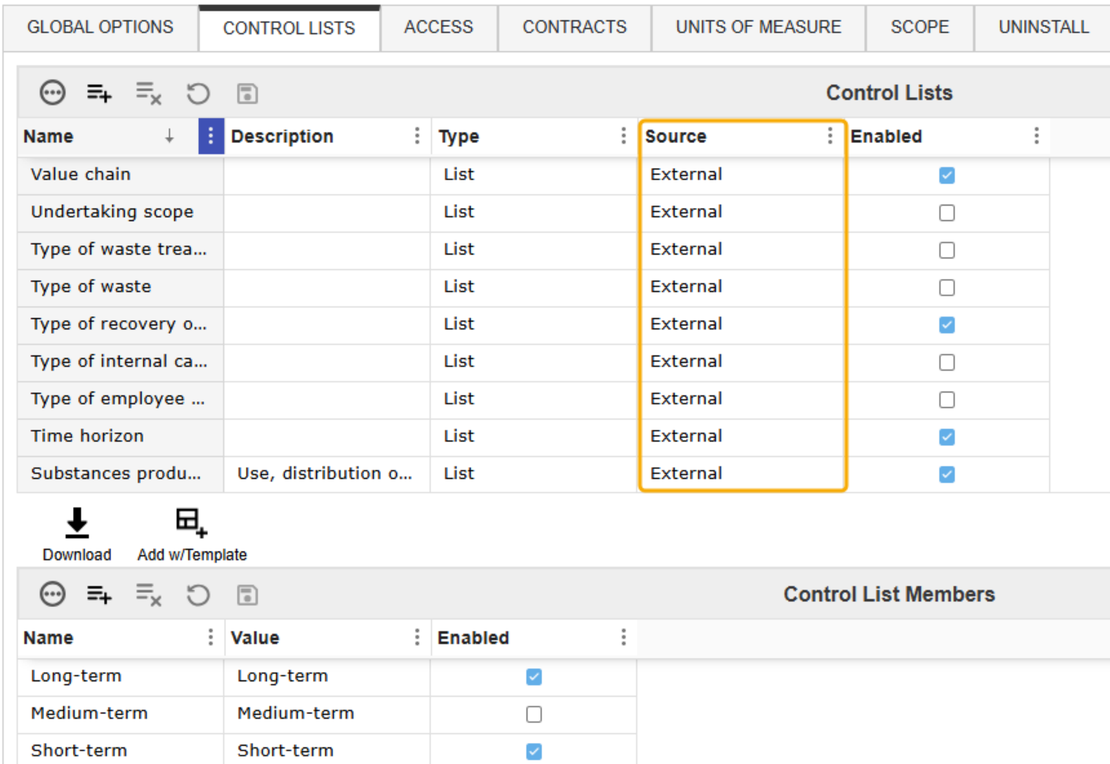
   > **NOTE:** The name must be unique.

3. Click the **Save** button.



External Control Lists

External control lists are pre-configured lists provided by the solution's framework provider to assist in your data collection. These control lists are marked as External in the Source column. When you select an external control list, all control list members display in the Control List Members grid.



External control lists and control list members are enabled by default. To disable an external control list or control list member, select the checkbox in the **Enabled** column.

Import Control List Members

Download Add w/Template

1. Click the **Download** button to download an Excel control list grid template. Fill in the template with control list members.

   > **NOTE:** All names must be unique. The Value column is not required for valid import.

2. After you complete the template, click the **Add w/ Template** button.
3. In the **File Upload** window, click the **BROWSE** button to open File Explorer.
4. Select the template, and click the **Open** button.
5. Click the **Upload** button. All control lists will display in the Control List Members grid.

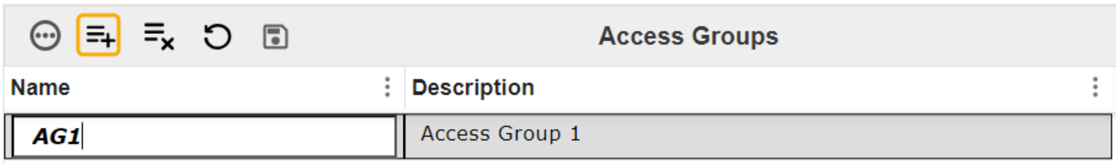
> **NOTE:** When a file is re-imported, all previous data in the grid will be replaced with any updated values from the file.

Access

The Access page enables Administrators to manage user roles by creating access groups and access group assignments for users. Users and Platform Security Groups are created in the OneStream System Administration tab. Administrators can leverage existing application security by adding Users and pre-existing Platform Security Groups to access groups on this page. Administrators can also mix and match based on their existing security model.

Manage Access Groups

1. Click the **Insert Row** button.
2. Enter an access group **Name** and **Description**. The Name field is required, and the Name must be unique for the access group to save.



3. Click the **Save** button.

> **IMPORTANT:** You cannot delete an access group if it is actively assigned to a site. The access group must first be removed from all assigned sites. See Sites.

Manage Access Group Members

Users can be assigned to the following roles:

Role	Description
Viewer	Viewers can only view data on the Home page. This role does not have access to the Settings, Administration, and Reports pages.
Preparer	Preparers enter data on the Home page. This role does not have access to the Settings, Administration, and Reports pages.
Approver	Approvers manage profile statuses. Approvers have access to the Settings, Administration, and Reports pages if they are also a OneStream Administrator or Solution Administrator.

To add users to an access group, complete the following steps:

1. Select the access group from the **Access Group** grid to display the **User** and **Platform Security Group** grids in the pane.

2. From the **Users** grid, click the **Insert Row** button.

a. From the **User** drop-down menu, select a user from the list.

b. From the **Role** drop-down menu, select a role for that user.

c. Click the **Save** button.

> **NOTE:** Multiple roles cannot be added to the same user.

To add user groups to an access group, complete the following steps:

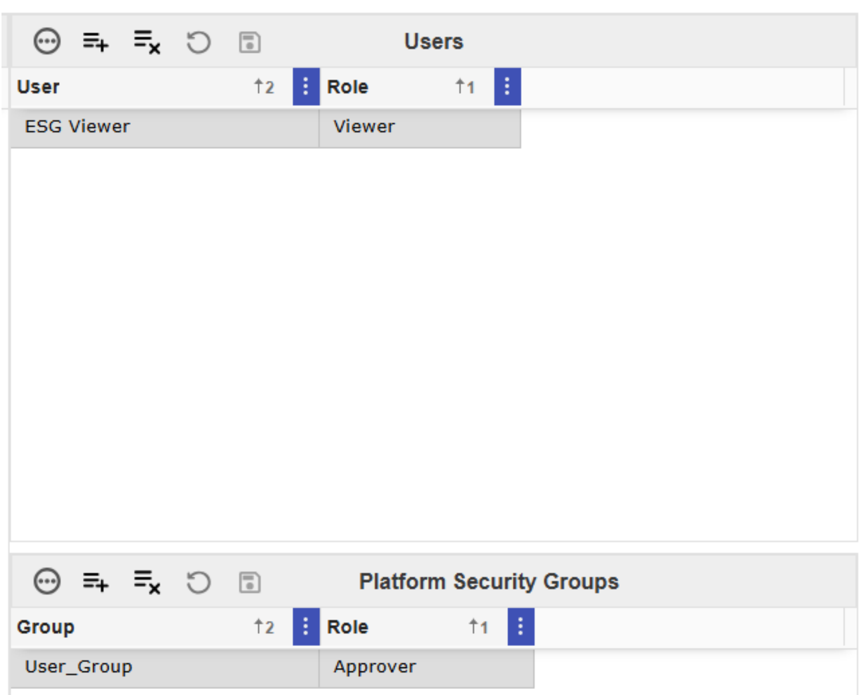
1. Select an access group from the **Access Group** grid to display the **User** and **Platform Security Group** grids in the pane.
2. From the **Platform Security Groups** grid, click the **Insert Row** button.

   a. From the **Group** drop-down menu, select a group from the list.

   b. From the **Role** drop-down menu, select a role for that user group.

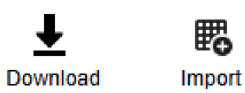
   c. Click the **Save** button.

> **NOTE:** Multiple roles cannot be added to the same user group.



 Click the **Remove Row** button to remove a user or user group.

Import Access Groups



Use the Download and Import icons to download a template and import access groups and group members.

To import access groups and group members, complete the following steps:

1. Click the **Download** button to display the **Template Options** slide-out.
2. From the **Select Template** drop-down menu, select either **Access Groups** or **Group Members**.
3. Click the **Download** button. Fill in all required template columns.

Column	Description
Access Groups Template	
Name	Enter a name for the access group.
Description (Optional)	Enter a description for the access group.
Group Members Template	
Access Group	From column drop-down menu, select an access group.
Member Type	From the column drop-down menu, select either **Security User** or **Security Group**.
User or Group Name	Enter a user or group name.
Role	From the column drop-down menu, select either **Preparer**, **Approver**, or **Viewer**.

4. To import the template, click the **Import** button.
5. In the **File Upload** window, click the **BROWSE** button to open File Explorer.
6. Select the template and click the **Open** button.

7. Click the **Upload** button.

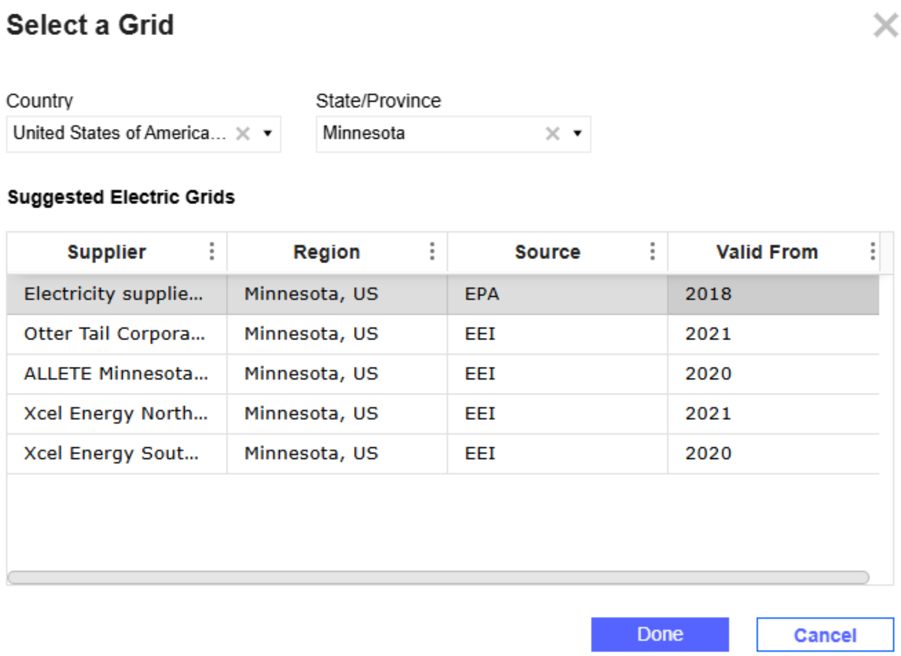
Contracts

Use the Contracts page to enter and manage renewable energy contracts. Entering your contracts is a crucial step because they are applied to your Scope 2 market-based calculations. The supplier listed on the contract will match with the supplier assigned to a site when a site is created. See Sites. The Scope 2 market-based usage calculations use the contract amount to offset the CO2e amounts. The contract value is applied to the consumption number until the contract value is fully used.

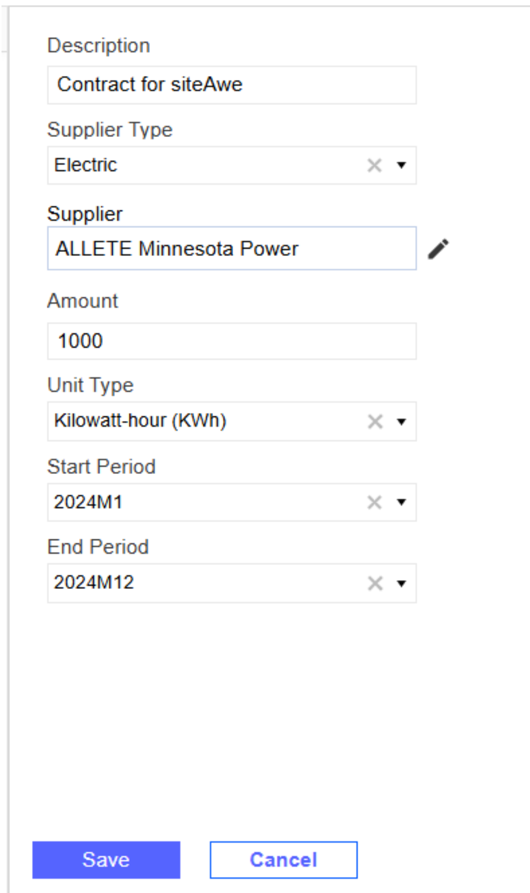
> **NOTE:** Contracts should match the reporting compliance year. For example, if the reporting year is June to July, Contracts should fall within June to July time periods.

To add a contract, complete the following steps:

1. Click the **Add** button.
2. Enter a contract **Description**.
3. From the **Supplier Type** drop-down menu, select either **Electric** or **Heat and Steam**.
4. To select a supplier, click the **Set Supplier** button.
    a. In the **Select a Grid** slide-out, from the **Country** drop-down menu, select a country.
    b. From the **State/Province** drop-down menu, select a state/province, if needed.
    c. Select a supplier from the grid and click the **Done** button.



5. In the **Amount** field, enter your contract amount.
6. From the **Unit Type** drop-down menu, select a unit type.
7. From the **Start Period** and **End Period** drop-down menus, select start and end dates for the contract.
8. Click the **Save** button.



Units of Measure

The Units of Measure page enables Administrators to view, manage, and set up unit of measure conversion rates. These unit of measure conversion rates are used for framework calculations and audit purposes.

The Units of Measure page has two tabs:

- External
- Internal

External

The External tab displays all units of measure provided through ESG Reporting and Planning. These units of measure cannot be added, edited, or deleted.

EXTERNAL INTERNAL

Unit Type	Default Unit Na...	Default Unit	Target Unit Name	Target Unit	To Default Con...	From Default C...
Time	Hour	h	Millisecond	ms	0.000000278	3,600,000
Time	Hour	h	Second	s	0.000277778	3,600
Time	Hour	h	Minute	m	0.166666667	60
Time	Hour	h	Hour	h	1	1
Time	Hour	h	Day	d	24	0.041666667
Time	Hour	h	Year	y	8,760	0.000141553
Area	Square Kilometer	km2	Square Meter	m2	0.000001	1,000,000
Area	Square Kilometer	km2	Square Feet	ft2	0.000000093	10,760,000
Area	Square Kilometer	km2	Square Kilometer	km2	1	1
Area	Square Kilometer	km2	Hectare	ha	0.01	100
Volume	Liter	l	Milliliter	ml	0.001	1,000
Volume	Liter	l	Liter	l	1	1
Volume	Liter	l	Cubic Meter	m3	1,000	0.001
Volume	Liter	l	Standard Cubic Foot	scf	28.317	0.03531448
Volume	Liter	l	Gallon	gal	3.785	0.2642008
Volume	Liter	l	Barrel	bbl	158.987	0.00628982
Weight	Kilogram	kg	Gram	g	0.001	1,000
Weight	Kilogram	kg	Kilogram	kg	1	1
Weight	Kilogram	kg	Ton	t	1,000	0.001
Weight	Kilogram	kg	Pound	lb	0.453514739	2.205
Weight	Kilogram	kg	Short Ton	ton	907.2	0.00110229
Distance	Kilometer	km	Meter	m	0.001	1,000

Internal

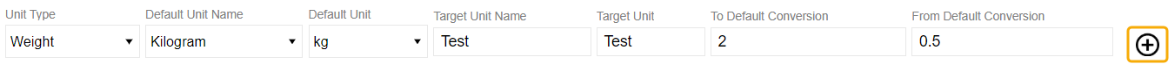
The Internal tab enables Administrators to create custom units of measure for different unit types.

To add a unit of measure, complete the following steps:

1. Select a **Unit Type** from the drop-down menu. A unit type must be selected first or the other fields will display No Data.
2. Populate all fields. The Default Unit Name and Default Unit drop-down menus will filter based on your Unit Type selection.

   > **NOTE:** Unit of measure entries can have a maximum of 13 decimal places. Numbers exceeding 13 decimal places are rounded.

3. Click the **Add** button. The new unit of measure is displayed in the grid.



To delete a unit of measure, click the **Delete Row** button.

Scope

Use the Scope page to view the scopes associated with factor categories to ensure calculations run correctly. This page displays how ESG Reporting and Planning connects factor groups with LCA Activity and scope options when determining the scope and category, for example, 3.1 Purchased Goods and Services, on the Factor Groups page. Some factors may work with multiple scopes and scope categories. In this case, do not double count your carbon activity.

> **IMPORTANT:** The scope table on the External tab is provided by Climatiq. This table is meant to be used as a guide only and may contain discrepancies due to the complex nature of carbon accounting and emission factor methodologies. It should be used as a guide in selecting emission factors. It does not represent any advice on carbon accounting.

External

The External tab displays the Sector, Category, LCA Activity, and associated Scope Type for all Climatiq provided factor categories. All external factors within the sector and category listed are associated with the scope type provided. These scopes cannot be added, edited, or deleted.

> **NOTE:** A sector with the same category may be associated with multiple scope types. For example, Buildings and Infrastructure for the Facility category may be reported as 3.1 or 3.2.

You can view the LCA Activity associated with each individual external factor on the Factors page under the External tab. See Factors. To view scopes for individual factors within these categories and make scope selections if applicable, see Manage Factor Groups.

EXTERNAL INTERNAL

Sector	Category	LCA Activity	Scope Type
Agriculture/Hunting/Forestry/Fishing	Agriculture/Hunting/Forestry/Fishing		3.1
Agriculture/Hunting/Forestry/Fishing	Arable Farming		3.1
Agriculture/Hunting/Forestry/Fishing	Fishing/Aquaculture/Hunting		3.1
Agriculture/Hunting/Forestry/Fishing	Livestock Farming		3.1
Agriculture/Hunting/Forestry/Fishing	Timber and Forestry Products		3.1
Agriculture/Hunting/Forestry/Fishing	Timber and Forestry Products		3.2
Agriculture/Hunting/Forestry/Fishing	Timber and Forestry Products	carbon_storage-cradle_to_gate	Outside of scopes
Agriculture/Hunting/Forestry/Fishing	Timber and Forestry Products	carbon_storage-cradle_to_gate	3.1
Agriculture/Hunting/Forestry/Fishing	Timber and Forestry Products	carbon_storage-cradle_to_gate	3.2
Buildings and Infrastructure	Construction		3.1
Buildings and Infrastructure	Construction		3.2
Buildings and Infrastructure	Facility		3.1
Buildings and Infrastructure	Facility		3.2
Buildings and Infrastructure	Housing		3.1
Buildings and Infrastructure	Housing		3.2
Buildings and Infrastructure	Infrastructure		3.1
Buildings and Infrastructure	Infrastructure		3.2
Buildings and Infrastructure	Maintenance and Repair		3.1
Buildings and Infrastructure	Maintenance and Repair		3.2
Buildings and Infrastructure	Maintenance and Repair	cradle_to_gate	3.1
Buildings and Infrastructure	Pavement and Surfacing		3.1
Buildings and Infrastructure	Pavement and Surfacing		3.2
Buildings and Infrastructure	Real Estate		3.1
Buildings and Infrastructure	Real Estate		3.2
Buildings and Infrastructure	Real Estate	unknown	3.1

Internal

Use the Internal tab to set up and manage custom scopes for internal factors. The internal factors you make must match the scope properties for them to accurately be assigned a scope. If the internal factor properties do not match what is entered on this page, the factor will automatically be assigned Outside of Scopes, and the factor will not display on the report.

To add an internal scope, complete the following steps:

> **NOTE:** You must add internal factors before you add internal scopes. The Sector, Category, and LCA Activity drop-down menus will display the corresponding internal factor entries for those properties. See Factors.

1. Click the **Insert Row** button.
2. From the **Sector** drop-down menu, select a sector.
3. From the **Category** drop-down menu, select a category.
4. From the **LCA Activity** drop-down menu, select an LCA Activity or **(All)**.
5. From the **Scope** drop-down menu, select a scope.
6. Click the **Save** button.

Uninstall

The Uninstall feature allows administrators to uninstall the ESG Reporting and Planning interface or the entire solution. If performed as part of an upgrade, any modifications performed on standard ESG Reporting and Planning objects are removed. There are two uninstall options:

- **Uninstall UI** removes solution-related dashboards and business rules but retains the database and related tables. For some releases, perform this step before accepting a new solution version because some of the dashboards or other objects may have changed. Choose this option to update ESG Reporting and Planning without removing the data tables.

  The Release Notes indicate if a reinstall over the existing version is supported.

- **Uninstall Full** removes all related dashboards, business rules, data tables, and data. Choose this option to completely uninstall ESG Reporting and Planning or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

CAUTION: Both uninstall procedures are irreversible.

Integrations

Use the Integration page to connect converted data to cubes. The Integration page has two tabs: Workflow Data Source and Dynamic Cube. The Workflow Data Source page enables you to connect your Scope 1-3 emissions data to a cube. The Dynamic Cube page enables you to connect your definition data to a dynamic cube.

Workflow Data Source

Use this page to initiate Connector Data Source setup. Select properties to customize your Connector Data Source:

Property	Description
Connection Name	Name a unique name to the connection. If you enter a name that already exists, you are asked if you want to overwrite the existing connection.
Destination Cube	This drop-down menu lists all available cubes in the application. Select a cube to connect data to.
Destination Workflow Import Profile (Optional)	This drop-down menu lists all available Workflow Profiles in the selected destination cube. This drop-down menu is blank until you select a destination cube. If you select a Workflow Profile, that Workflow Profile's Data Source Name is set to ESG_[CubeName]_DataSource.

Property	Description
Destination Transformation Rule Profile (Optional)	This drop-down menu lists all available Transformation Rule Profiles in the selected destination cube. This drop-down menu is blank until you select a destination cube. If you select a Transformation Rule Profile, then the workflow profile will be updated based on the selected value.
ESG Scenario	Use this field to choose the scenario member that will receive the data. Click the ellipses to open the **Select Member** window and choose a scenario from the cube selected in Global Options. See Global Options.
ESG Entity Filter (Optional)	Use this field to filter outgoing data. Click the ellipses to open the **Member Filter Builder** window. Enter a valid filter and click the **OK** button. All valid filters must start with E#.

When you have made your selections, click the **Create** button. A Connector Data Source is created with the following configurations:

- **Name**: ESG_[CubeName]_DataSource
- **Description**: Data Source Generated by ESG
- **Access Group**: Everyone
- **Maintenance Group**: Everyone
- **Cube Name**: The name of the Destination Cube selected
- **Scenario Type**: (All)
- **Data Structure Type**: Tabular Data
- **Allow Dynamic Excel Loads**: False

- **Connector Name**: ESG_[CubeName]_BR
- **Connector Uses Files**: False

The Connector Data Source is configured with the following Connector Fields:

- FactorName
- co2e
- co2
- n2o
- ch4
- Scenario
- Time
- Entity
- Control List Value

To view or edit the configurations, go to **Application** > **Data Collection** > **Data Sources** > **Connectors** > **ESG_[CubeName]_DataSource**. See "Connector Data Source" in the *Design and Reference Guide*.

Dynamic Cube

Use this page to initiate dynamic cube setup. The dynamic cube inherits the same entity, scenario, and flow dimensions as the ESG Default Cube selected in Global Options. The structure of the dynamic cube created is based on the entity structure of the ESG Default Cube. If the ESG Default Cube is not a top level cube and has no reference cubes, then a single dynamic cube is created. If the top level cube has two referenced cubes, then a dynamic top level cube with two referenced dynamic cubes is created. See Appendix D: Dynamic Cube POV.

The dynamic cube structure created includes the following items:

- Two account dimensions:
  - **ESG_AccountsTop**: A dimension for dynamic calculations. See Calculation Bucket.
  - **ESG_Accounts**: A dynamic dimension that holds framework KPIs.
- **ESG_UOMs**: A dynamic dimension that holds unit of measure values.
- **ESG_ControlLists[#]**: Dynamic dimensions that hold control list values.

Select properties to customize your dynamic cube:

Property	Description
Cube Name	Name the dynamic cube. This name cannot be changed once the dynamic cube is created.
Refresh Frequency (Hours)	As data is updated and changed in the solution, the data in the dynamic cube will update accordingly at set intervals. To customize that interval, enter an hourly value in the field. The value must be a whole number greater than zero. The property defaults to 24 hours. **IMPORTANT:** It is not recommended to refresh hourly outside of solution configuration and testing as this can impact reporting performance. **NOTE:** Only data from approved profiles will update in the dynamic cube.
Account Inherited Dimension	Select an account dimension to inherit. This drop-down menu lists all account dimensions in the application. The default value is RootAccountFin.

Property	Description
UD 1-8	Use these drop-down menus to assign UDs to the cube. These fields default to RootUD[#]Dim. You can choose which UD dimensions will have Control Lists 1-4 and which UD dimension will have the units of measure. Each dynamic dimension can only be listed once. A UD dimension selection for units of measure is required.
UD 1-8 Inherited Dimensions	These fields only display if you are creating a dynamic dimension, and the drop-down menus only list the UD dimensions. These fields default to RootUD[#]Dim.

When you have made your selections, click the **Create** button. Once you have created a dynamic cube, you can use the Integrations page to update the existing cube. Make property selections and click the **Update** button.

To force the dynamic cube to refresh data, use the **Refresh Cube Data** button. The data will refresh regardless of the refresh interval set.

Calculation Bucket

To perform calculations in dynamic cubes, use the Calculation Bucket. While dynamic dimensions are automatically refreshed at regular intervals, members created in the Calculation Bucket can only be updated by an administrator in the Application tab. The Calculation Bucket is automatically created with the dynamic cube and includes the example member GOV_1_05_CALC to demonstrate syntax.

To create a new calculation, complete the following steps:

1. To update dynamic member settings, in ESG Reporting and Planning, go to **Administration** > **Definitions**.
   a. Select the definitions that will be calculated in the dynamic cube.
   b. In the **Cube** tab, set the **Account Type** and **Formula Type** properties to **DynamicCalc**.
   c. Click the **Save** button.
2. To create the calculated member, in the Windows Application, go to **Application** > **Cube** > **Dimensions**.
   a. Select the **Account Dimensions** node and then select **ESG_AccountsTop**.
   b. In the **Members** tab, select **Calculation Bucket - Calculated Accounts** and click the **Create Member** button.
   c. Name the member. The member name controls where it displays in the dynamic cube. Use the following syntax to connect the calculation member to an existing definition account member: [Definition Account Name]_CALC. For example, GOV_1_05_CALC references the GOV_1_05 account member in the dynamic cube. Each time the dynamic cube is refreshed, the calculation is copied from GOV_1_05_CALC and pasted into the GOV_1_-5 dynamic member. The member name is case sensitive.

      > **NOTE:** To view definition account names, go to **Account Dimensions** > **ESG_AccountsTop** > **ESG_Accounts** > **TotalFrameworks**.

   d. Under **Settings**, from the **Account Type** and **Formula Type** drop-down menus, select **DynamicCalc**.
   e. Under **Vary By Scenario Type And Time**, in the **Formula** field, add your formula.
   f. Click the **Save Member** button.

NOTE: Calculations stored in the Calculation Bucket are updated each time the dynamic cube is refreshed. To see how often the dynamic cube is refreshed, view the refresh interval entered on the Integrations page in Refresh Frequency (Hours).

Administration

Select the hamburger menu to navigate to the Administration tab.

> **IMPORTANT:** The Administration tab is only accessible to OneStream Administrators and Solution Administrators. See Global Options.

Use the Administration tab to access the following pages:

- Frameworks
- Definitions
- Factors
- Factor Groups
- Sites
- Profiles

Frameworks

Use the Frameworks page to manage external and internal frameworks. Frameworks are used to assess company performance and to standardize reporting. ESG Reporting and Planning provides access to multiple frameworks.

> **IMPORTANT:** The supported framework for the current release version is ESRS.

- External Frameworks
- Internal Frameworks

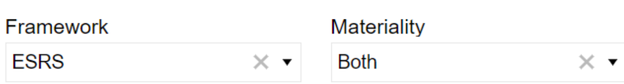
External Frameworks

Use the External page to import and manage external frameworks. See Third Party Component Technology for more information.

Use the toolbar options to manage external frameworks.

- To display guidance for parent level framework KPIs in the tree view, click the **Info** button.
- To show guidance for individual KPIs, select the row and click the **Guidance** button. Not every KPI has additional information. The Guidance column in the Frameworks grid displays a checkmark if guidance is available.
- To mark a KPI as material, click the **Material** button.
- To mark a KPI as not material, click the **Not Material** button.

Framework Filters



Framework

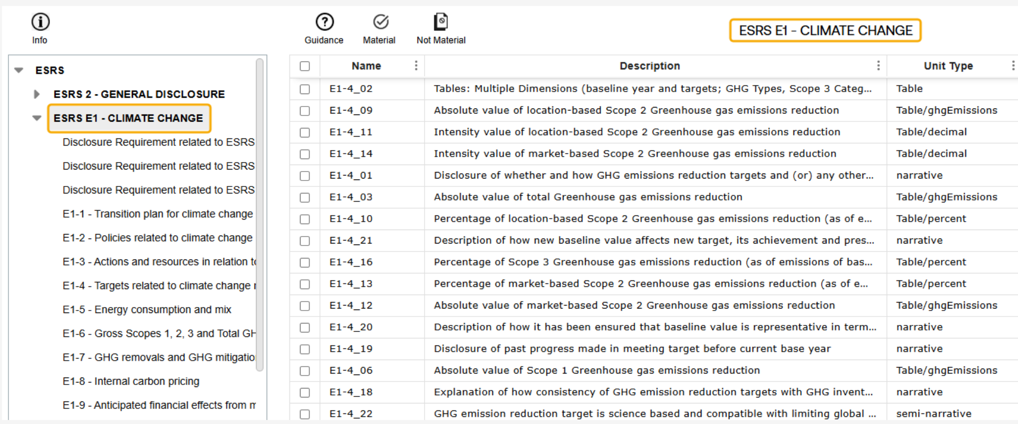
Use the Frameworks filter drop-down menu to select from imported Frameworks. Framework KPIs will not display in the grid unless you have selected a framework from this filter.

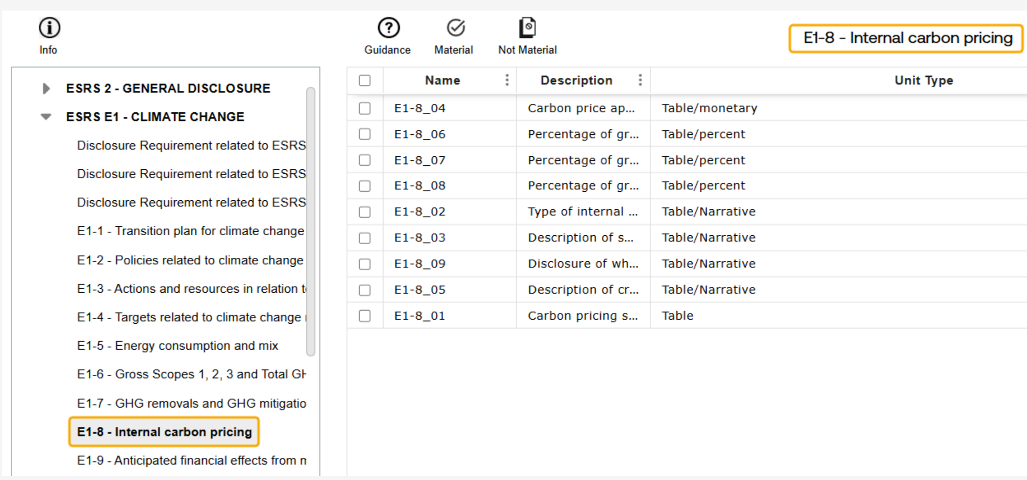
Materiality

The default Materiality is Both. To display only Material KPIs, select **True** from the drop-down menu. To display only Not Material KPIs, select **False** from the drop-down menu

The External page includes a pane with a tree view of the framework structure. You can use the tree view to filter KPIs in the frameworks grid.

> **Example:** To display only KPIs within ESRS E1-Climate Change, select **ESFS E1-Climate Change** from the tree view. To drill down further, select **E1-8 Internal carbon pricing** to view those KPIs in the grid.





Internal Frameworks

Use the Internal page to add custom frameworks and KPIs.

- Create Internal Frameworks
- Internal Framework Filters
- Add Internal KPIs

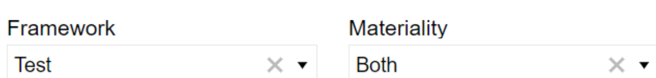
Create Internal Frameworks

The Internal page is blank until you create a framework. Once you create a framework, the page will refresh with a KPI grid.

1. Click the **New** button to display the **New Internal Framework** slide-out
2. Enter a framework **Name**
3. Click the **Save** button

The Internal page will default to the framework created.

Internal Framework Filters



Framework

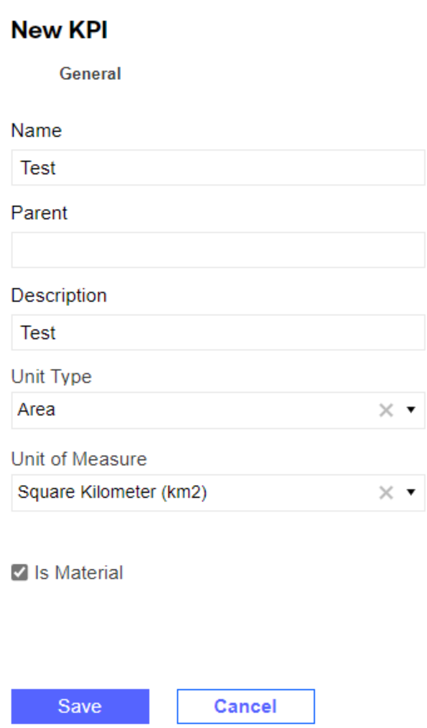
Use the Frameworks filter drop-down menu to select an internal framework. When a new framework is created, the filter will default to that framework. Framework KPIs will not display in the grid unless you have selected a framework from this filter.

Materiality

The default Materiality is Both. To display only Material KPIs, select **True** from the drop-down menu. To display only Not Material KPIs, select **False** from the drop-down menu.

Add Internal KPIs

1. From the **Framework** drop-down menu, select a framework.
2. Click the **Add** button to display the **New KPI** pane.



3. Fill in all required fields.

Field	Description
Name	Enter a KPI **Name**. This field is required.
Parent	Enter a KPI **Parent**. This field is not required.
Description	Enter a KPI **Description**. This field is required.
Unit Type	From the **Unit Type** drop-down menu, select a unit type. This field is required. The Unit Type drop-down menu selection filters down the available options in the Unit of Measure drop-down menu. For example, if a unit type of Area is chosen from the Unit Type drop-down menu, the Unit of Measure drop-down menu will only display units in the Area unit type.
Unit of Measure	From the **Unit of Measure** drop-down menu, select a unit of measure. If you select a value from the Unit of Measure drop-down menu and no value is selected from the Unit Type drop-down menu, the Unit Type drop-down menu will populate with the corresponding unit type. If the Unit Type selected does not require a Unit of Measure, like Narrative or Table, the Unit of Measure drop-down menu will display No Data.
Is Material	This checkbox is selected by default. To make a KPI Not Material, clear the **Is Material** checkbox.

4. Click the **Save** button.

To remove a KPI, click the **Delete** button.

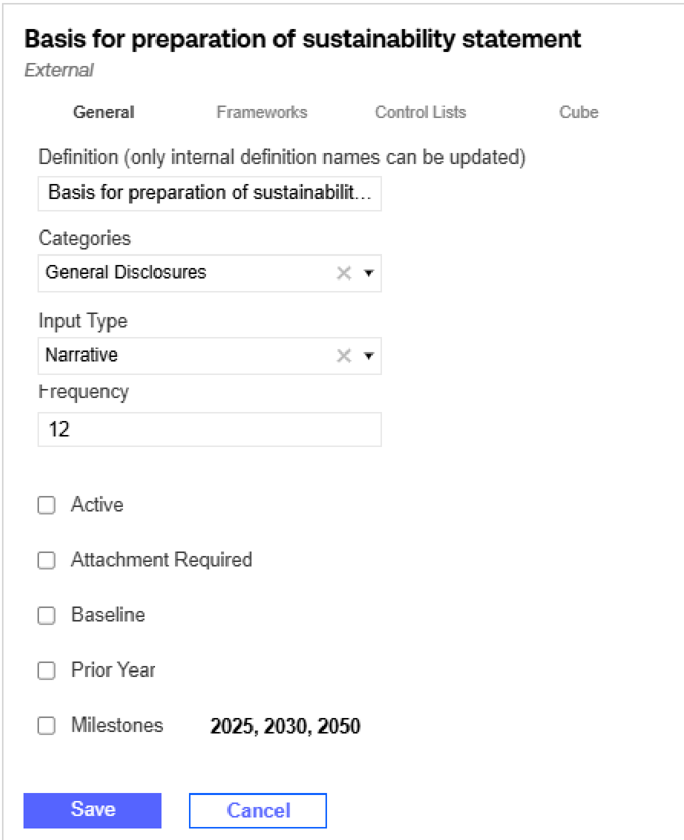
Definitions

The Definitions page is intended to help you assemble what needs to be collected and ensure it is linked to the frameworks you need. Definitions are used to collect additional data points that are unrelated to factors. These definitions are defined by OneStream and are linked to ESRS framework KPIs. You cannot delete definitions provided in the solution, but you can edit and deactivate them. Definitions provide flexibility when reporting on more than one framework. Definitions can be assigned to multiple frameworks so that definition data only requires a single entry. If a dynamic cube is being configured, administrators can set dimension member properties for each definition from this page in the Cube tab.

- Definitions Details Pane
- Manage Definitions
- Categories

Definitions Details Pane

To view definition details, select a definition from the **Definitions** grid and the **Definitions** details pane is displayed. Use the Definitions details pane to edit the selected definition. The Definitions details pane has four tabs: General, Frameworks, Control Lists, and Cube.



General

Use the General tab to edit definition general properties.

Property	Definition
Definition	The Definition field is read only. System defined definitions cannot be edited.
Categories	To change a definition's category, use the **Categories** drop-down menu.
Input Type	To change a definition's input type, use the **Input Type** drop-down menu. To view which input types are mapped to the ESRS data types,

Property	Definition
	see Definition Input Types.
Frequency	To edit a definition's frequency, use the **Frequency** field. Comma delimited format and range format is accepted in this field. This frequency determines which workflow periods the definition will display in. Definitions with a Narrative unit type default to a yearly frequency.
Active	Definitions are active by default. To make a definition inactive, clear the **Active** checkbox.
Attachment Required	To require an attachment for a definition, select the **Attachment Required** checkbox.
Baseline	To include the baseline year in the report for this definition, select the **Baseline** checkbox. The values set up in the Global Options page display here. See Global Options.
Prior Year	To include the prior year in the report for this definition, select the **Prior Year** checkbox.
Milestones	To include the milestone years in the report for this definition, select the **Milestones** checkbox. The values set up in the Global Options page display here. See Global Options.

See Report Structure and Data Management for details on how the Baseline, Prior Year, and Milestone options impact data collection and reporting.

NOTE: The Baseline, Prior Year, and Milestone checkboxes are selected by default for definitions linked to KPIs E1-6:

Definition	Category
Gross Scopes 1, 2, 3 and Total GHG emissions - total GHG emi...	GHG Emissions
Gross Scope 1 greenhouse gas emissions	GHG Emissions
Percentage of Scope 1 GHG emissions from regulated emission...	GHG Emissions
Gross location-based Scope 2 greenhouse gas emissions	GHG Emissions
Gross market-based Scope 2 greenhouse gas emissions	GHG Emissions
Gross Scope 3 greenhouse gas emissions	GHG Emissions
Total GHG emissions location based	GHG Emissions
Total GHG emissions market based	GHG Emissions
Disclosure of significant changes in definition of what constitut...	GHG Emissions

Click the **Save** button after editing general definition properties.

Frameworks

Use the Frameworks tab to view which framework KPI is assigned to the definition. The assigned framework KPI is displayed in the bottom grid. For more information on frameworks, see Frameworks.

To assign additional framework KPIs to the definition, see Manage Definitions.

Control Lists

Use the Control Lists tab to assign control lists to the selected definition. A maximum of four control lists can be assigned to a definition. For more information on control lists, see Control Lists. The selection for Control List 1 displays as the first column on the report, and the selection for Control List 2 displays as the second column. Control Lists 3 and 4 do not display on the report. See Narrative Control List Table Display.

Cube

When configuring Dynamic Cube Services, use the Cube tab to set dimension member properties for each definition. Any updates made to a definition are reflected in the related account dimension member.

Property	Description
Account Type	This property determines how the accounts roll up to a parent. Each definition is preset to a recommended Account Type. If there is no recommended Account Type set, the property defaults to Flow. For descriptions of each Account Type drop-down menu option, see "Account Dimension" in the *Design and Reference Guide*.
Formula Type	This property determines the behavior related to the member's formula. Each definition is preset to a recommended Formula Type. If there is no recommended Formula Type, the property defaults to (Not Used). For descriptions of each Formula Type drop-down menu option, see "Account Dimension" in the *Design and Reference Guide*.
Text Properties 1-8 (Optional)	Use these fields to set custom attributes for use in business rules, member filters, or transformation rules. Change the value over time as business needs change or by scenario type. If multiple attributes are required in a single text field, separate them with a comma.

NOTE: Once a dynamic cube is made, dynamic dimensions are read-only in the OneStream Application tab.

Manage Definitions

Complete the following steps to add a definition:

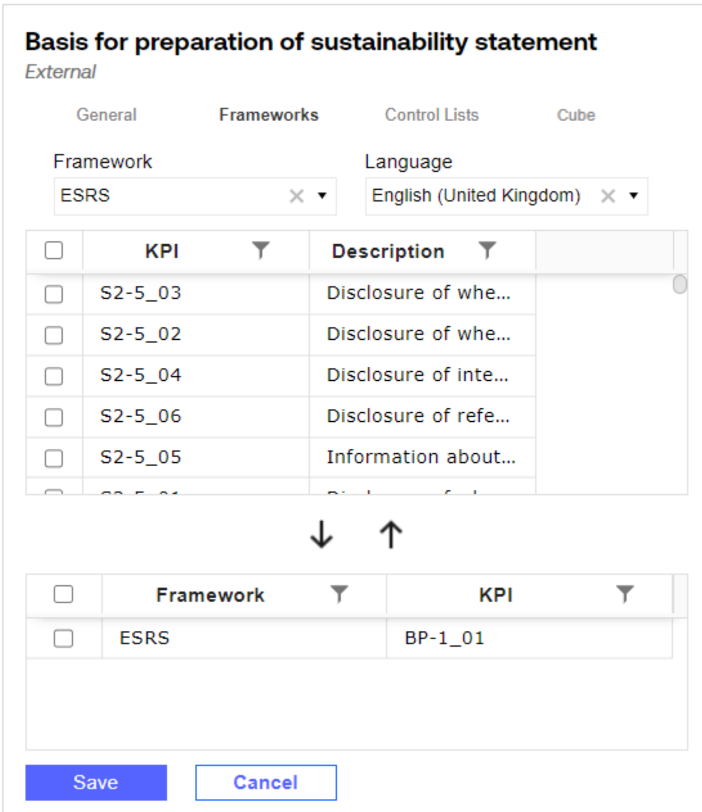
1. Click the **New** button.

2. In the **General** tab, fill in all required fields.

Property	Definition
Definition	Enter a **Definition**.
Categories	From the **Categories** drop-down menu, select a category.
Input Type	From the **Input Type** drop-down menu, select an input type. To view which input types are mapped to the ESRS data types, see Definition Input Types.
Frequency	In the **Frequency** field, enter a frequency. Comma delimited format and range format is accepted in this field. This frequency determines which workflow periods the definition will display in. Definitions with a Narrative unit type default to a yearly frequency.
Active	Definitions are active by default. To make a definition inactive, clear the **Active** checkbox.
Attachment Required	To require an attachment for a definition, select the **Attachment Required** checkbox.
Baseline	To include the baseline year in the report for this definition, select the **Baseline** checkbox.
Prior Year	To include the prior year in the report for this definition, select the **Prior Year** checkbox.
Milestones	To include the milestone years in the report for this definition, select the **Milestones** checkbox.

a. Click the **Save** button.

3. Go to the **Frameworks** tab to assign KPIs to the definition.

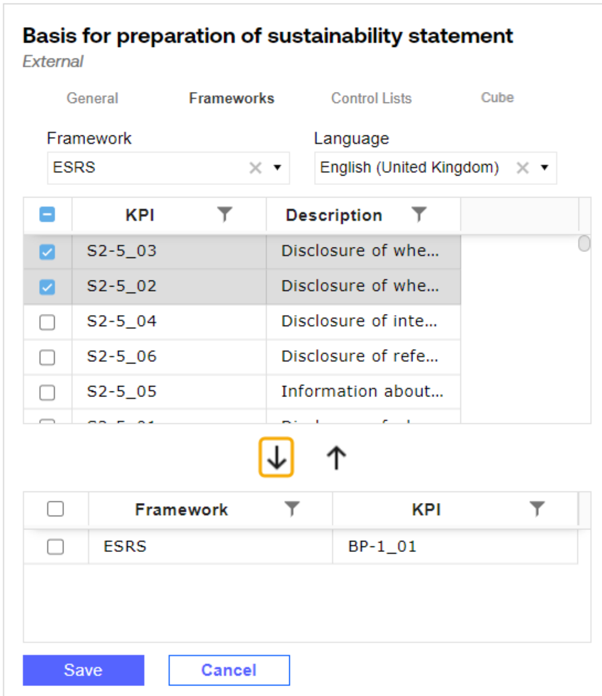


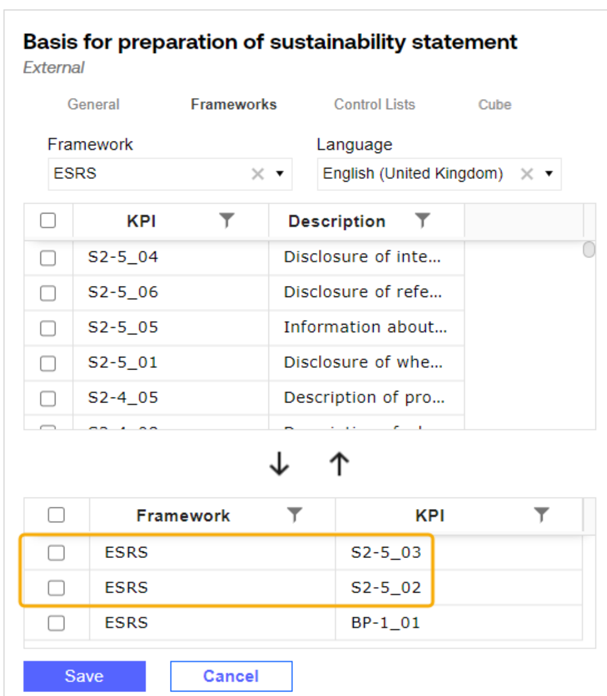
a. From the **Frameworks** drop-down menu, select the framework containing the KPIs you want to assign to the definition. All KPIs in that framework are displayed in the grid below.

> **NOTE:** Both internal and external frameworks are supported and will display in the Frameworks drop-down menu.

b. Use the checkboxs to select KPIs.

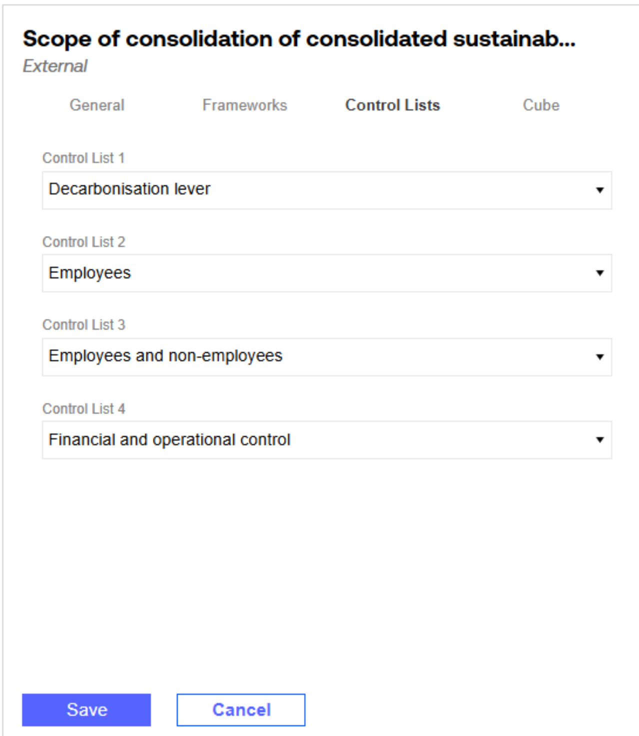
c. Click the **Add** button. The KPIs will display in the bottom grid.


Basis for preparation of sustainability statement
External
General
Frameworks
Control Lists
Cube
Framework
ESRS
Language
English (United Kingdom)
KPI
Description
S2-5_03
Disclosure of whe...
S2-5_02
Disclosure of whe...
S2-5_04
Disclosure of inte...
S2-5_06
Disclosure of refe...
S2-5_05
Information about...
Framework
KPI
ESRS
BP-1_01
Save
Cancel


Basis for preparation of sustainability statement
External
General
Frameworks
Control Lists
Cube
Framework
ESRS
Language
English (United Kingdom)
KPI
Description
S2-5_04
Disclosure of inte...
S2-5_06
Disclosure of refe...
S2-5_05
Information about...
S2-5_01
Disclosure of whe...
S2-4_05
Description of pro...
Framework
KPI
ESRS
S2-5_03
ESRS
S2-5_02
ESRS
BP-1_01
Save
Cancel

d. Click the **Save** button.

4. Go to the **Control Lists** tab to assign control lists to the definition. From the **Control List 1**,**Control List 2**, **Control List 3**, and **Control List 4** drop-down menus, select control lists and then click the **Save** button.



> **NOTE:** Control lists must be selected sequentially. For example, the Control List 1 selection cannot be blank if Control List 2 has a selection.

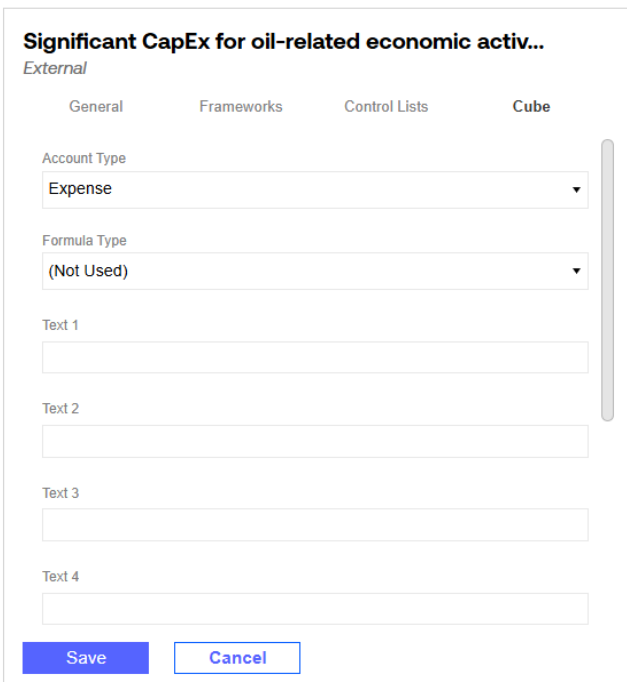
5. If configuring a Dynamic Cube Service, go to the **Cube** tab.

a. From the **Account Type** drop-down menu, select an account type. Each field defaults to the recommended settings.

b. From the **Formula Type** drop-down menu, select a formula type. Each field defaults to the recommended settings.

c. In the **Text** fields, enter values if needed. If multiple attributes are required in a single text field, separate them with a comma.

d. Click the **Save** button.



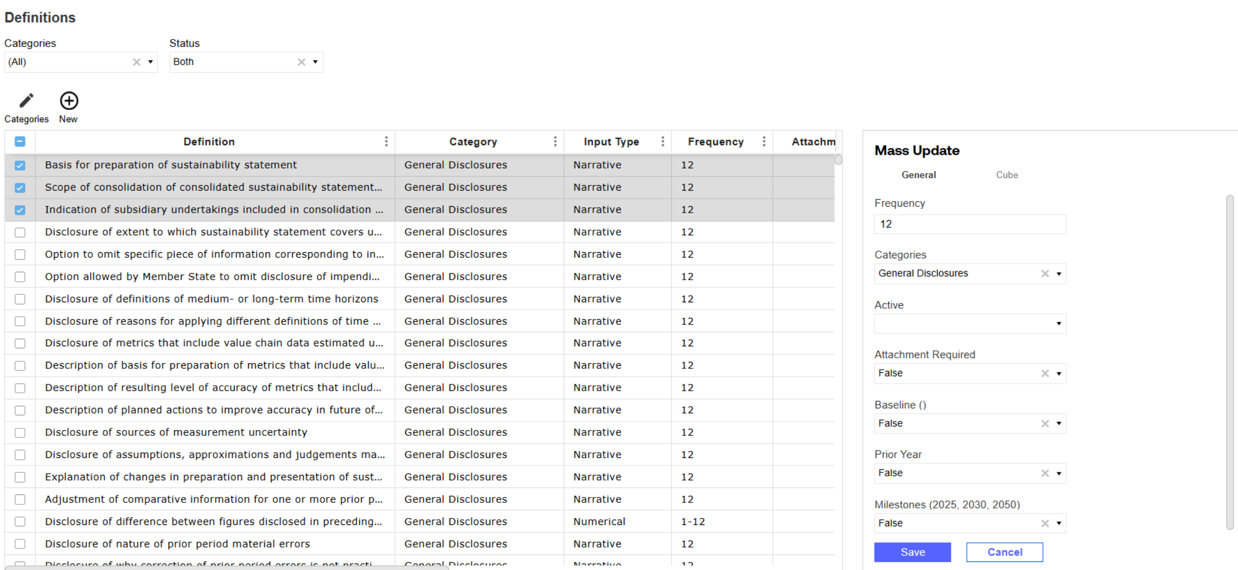
To delete an internal definition, click the **Delete** button.

> **NOTE:** The Delete icon only displays when an internal definition is selected. Solution provided definitions cannot be deleted. If an internal definition is assigned to a profile, marked as active, or has data entered for it, you cannot delete the definition. To prevent data entry for a definition that cannot be deleted, mark the definition as Inactive.

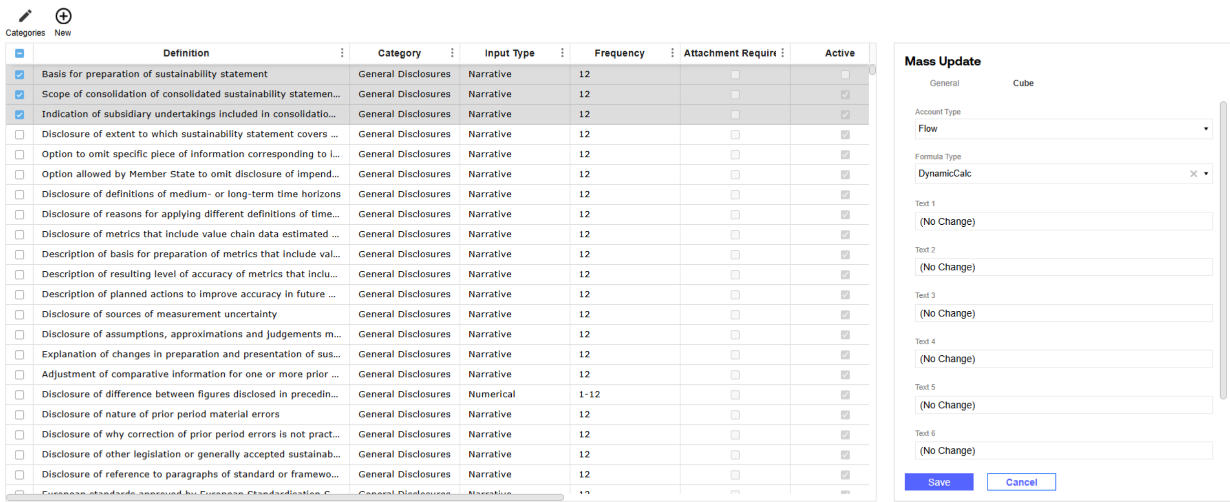
Mass Update Definitions

Use the Mass Update pane to modify the properties for multiple definitions at once. To display the **Mass Update** pane, use the checkboxes to select multiple definitions from the grid. The Mass Update pane enables you to edit General properties and Cube properties.

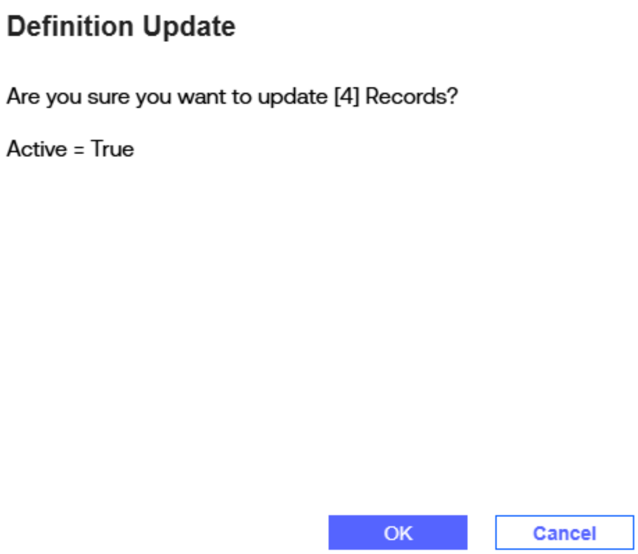
The pane displays all common data between the selected definitions. If the property selection is not common between the selected definitions, that property is left blank.



In the Cube tab, the Text properties display (No Change) by default. These properties are not updated unless a user modifies the default value.



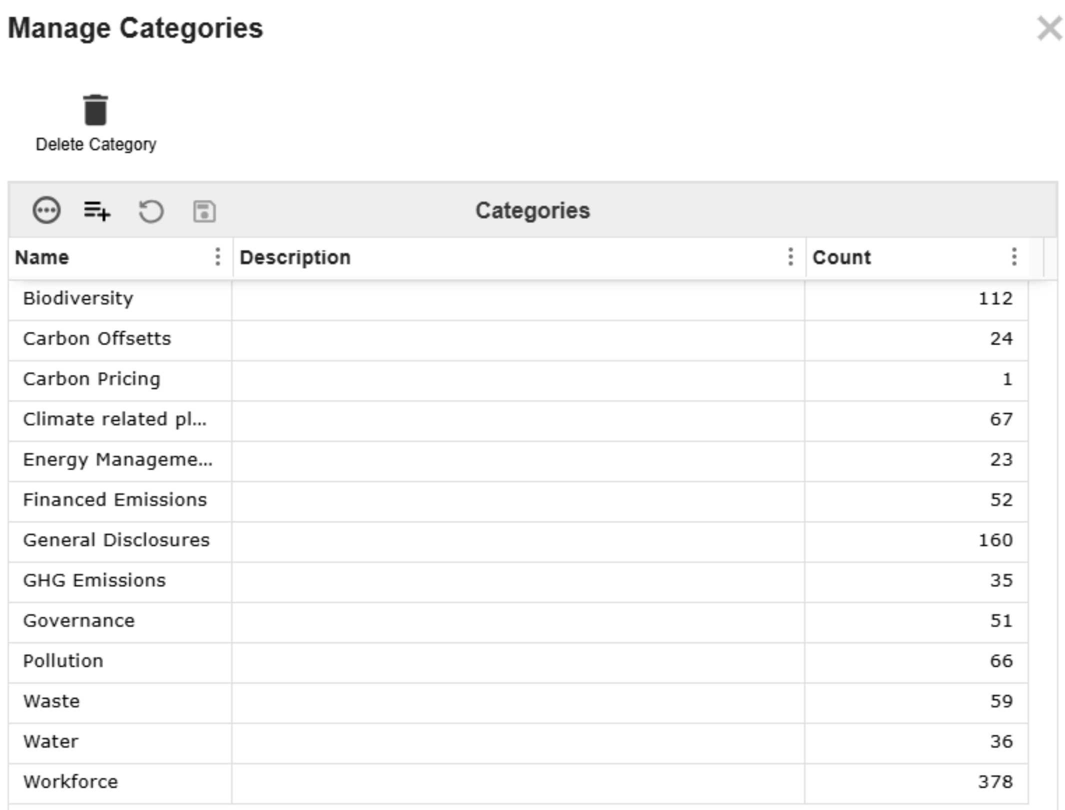
When you have finished editing the definitions, click the **Save** button. A Definition Update slide-out is displayed with a summary of your changes. To proceed with the mass update, click the **OK** button.



To mass delete internal definitions, use the checkboxes to select multiple internal definitions from the grid and then click the **Delete** button.

Categories

1. Click the **Categories** button to display the **Manage Categories** slide-out. All default categories will display in the **Categories** grid.



Name	Description	Count
Biodiversity		112
Carbon Offsetts		24
Carbon Pricing		1
Climate related pl...		67
Energy Manageme...		23
Financed Emissions		52
General Disclosures		160
GHG Emissions		35
Governance		51
Pollution		66
Waste		59
Water		36
Workforce		378

2. Click the **Insert Row** button to add a new category.
3. Enter a **Name**. The Description field is optional.
4. Click the **Save** button.

The Count column will show the number of definitions assigned to that category. New categories will have a count of zero.

Add Definitions to Categories

1. Select the definition from the **Definitions** grid to display the **Definition** details pane.
2. From the **Categories** drop-down menu, select a category for the definition.
3. Click the **Save** button.

Deleting Categories

To delete a category, click the **Delete Category** button.

If the category you are deleting has definitions assigned to it, those definitions will be moved to an automatically created Other category. This Other category cannot be deleted while definitions are assigned to it. You must first reassign these definitions.

Factors

Use the Factors page to manage external and internal factors. Factors are used to measure sustainability and performance. External factors are provided by Climatiq, and internal factors are created or imported by the user. Factors can be collected into factor groups to organize data collection. See Factor Groups.

- External Factors
- Internal Factors
- Assign Factors to Factor Groups

External Factors

Use the External page to manage Climatiq provided factors. External factors cannot be deleted or edited.

- Check Factor Version
- External Factor Filters

Use the toolbar options to manage factors

- To check the API Data Version, click the **Check Version** button.
- To update outdated data, click the **Get Latest** button.

> **NOTE:** This icon is not clickable if the data is already updated to the latest version.

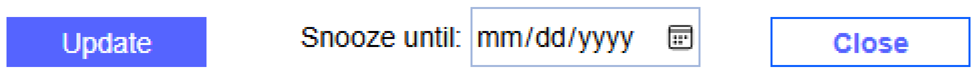
- To assign factors to factor groups, click the **Add to Group** button. See Assign Factors to Factor Groups.
- To view updated factor values, click the **Audit** button.

Check Factor Version

The current data version number is displayed above the Factors grid. If factors need to be updated to the current version, when you select the Factors tab, a slide-out will display prompting you to update factors to the latest version.

- To update factors, click the **Update** button.
- To delay factor update, in the **Snooze until** field, use the calendar pop-up to select a date for factor update and click the **Close** button. The update notification will not display again

until that set date.



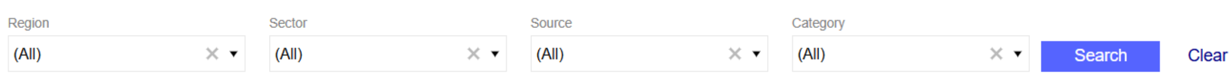
To check that the factors are up to date, click the **Check Version** button.

- If the data is up to date, the Update Climatiq Factors with Latest Version icon will be greyed out.
- If the data is out of date, you will be prompted to update your data to the latest version. Click the **Get Latest** button to update factors.

To view all updated factor values, click the **Audit** button. A slide-out is displayed showing the previous value and the updated value for each factor. If an existing factor assigned to a factor group was removed, the Removed Factors Audit grid will display all factor groups the factor was removed from.

> **NOTE:** If an existing factor assigned to a factor group has been replaced by a new factor, the new factor will link to the same factor group.

External Factor Filters



The Factors grid does not populate until you click the Search button. Use the filters to select a Region, Source, Sector, and Category from the drop-down menus.

> **NOTE:** Selecting a filter from one category filters down the options in the other available filters. For example, if a user selects a Region first, the Source, Sector, and Category filters only display results available in that region.

Internal Factors

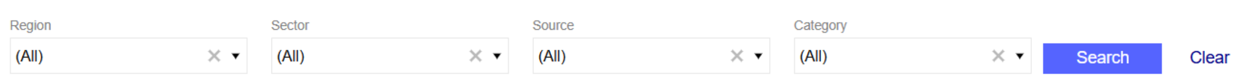
The Internal page enables users to create custom factors. Use the Internal tab to add, edit, delete, and import custom factors.

- Internal Factor Filters
- Create New Internal Factors
- Import Internal Factors

Use the toolbar options to manage factors.

- To add a new factor, click the **New** button.
- To edit a factor, click the **Edit** button.
- To remove a factor, click the **Delete** button. This sets the factor's Status to Removed.
- To assign factors to factor groups, click the **Add to Group** button. See Assign Factors to Factor Groups.
- To import factors from an Excel file, click the**Add w/Template** button.
- To download an Excel import template, click the **Download** button.

Internal Factor Filters



The Factors grid does not populate until you click the Search button. Use the filters to select a Region, Source, Sector, and Category from the drop-down menus.

> **NOTE:** Selecting a filter from one category filters down the options in the other available filters. For example, if a user selects a Region first, the Source, Sector, and Category filters only display results available in that region.

Create New Internal Factors

1. Click the **New** button to display the **Factor** slide-out.
2. Fill in all required fields. These fields are not required: Description, Uncertainty, Source, and CO2 Other.

   If the CO2e Total field is populated, you do not have to populate the CO2 Value, CH4 Value, and N2O Value fields. If these fields are populated, the CO2e Total field is not required. The CO2e, CO2, CH4, and N20 entries must be positive numbers.

   > **NOTE:** All numeric field entries can have a maximum of 13 decimal places.

   To use an internal factor as an electric grid for a site, ensure the following conditions are met:

   a. Enter a factor **Name**. For supplier mix factors, the name must contain Supplier Mix or Supplier_Mix, for example, Electric_Cleveland_Supplier_Mix. For residual mix factors, use the same naming convention and replace Supplier with Residual, for example, Electric_Cleveland_Residual_Mix.

   b. Ensure that the **Region** field entry matches or is higher than the site the factor is assigned to. For example, if the site region is Florida, the internal factor region can be Florida or the United States.

   c. In the **Source LCA Activity** field, enter **electricity_generation**.

   d. In the **Category** field, enter **Electricity**.

   e. In the **Sector**field, enter **Energy**.

To use an internal factor as a heat and steam source for a site, ensure the following conditions are met:

a. Enter a factor **Name**. There are no naming restrictions for heat and steam.

b. Ensure that the **Region** field entry matches or is higher than the site the factor is assigned to. For example, if the site region is Florida, the internal factor region can be Florida or the United States.

c. In the **Source LCA Activity** field, enter **use_phrase** or **unknown**.

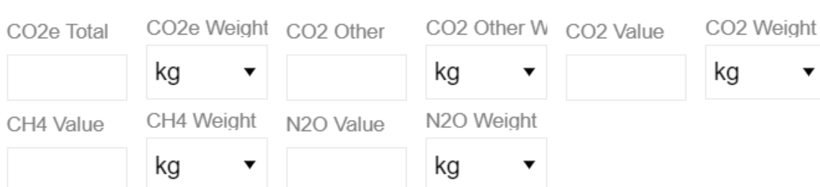
d. In the **Category** field, enter **Heat and Steam**.

e. In the **Sector** field, enter **Energy**.

Internal factors assigned to an electric grid or heat and steam source display on the Home page in the Utilities tab for data entry.

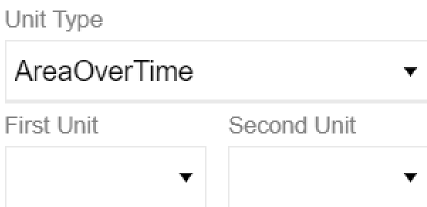
Emission Weight

All gas emission weight drop-down menus default to kilograms. To change the gas emission weight, you must select a unit from each drop-down menu individually.



First Unit and Second Unit

If the Unit Type selected requires two unit selections, such as AreaOverTime, the Second Unit drop-down menu displays.



3. Click the **Save** button.

Import Internal Factors

Click the **Download** button to download an excel factor grid template. Fill in the template with custom factors. Ensure that all units are valid and all required columns are populated to complete a valid template import. See the following table for validation reference:

Column	Requirement for Valid Import
Name	This column is required.
Description	This column is not required
Region Name	This column is required. All Region column entries must match the options available in the Region drop-down menu.
Sector	
Category	These columns are required.
Year	
Unit Type	This column is required. Refer to the Units of Measure to view all valid unit types and units.

Column	Requirement for Valid Import
First Unit	This column is required. Refer to the Units of Measure to view all valid unit types and units.
Second Unit	This column is only required if your Unit Type requires two unit selections, such as AreaOverTime. Refer to the Units of Measure to view all valid unit types and units.
Source LCA Activity	This column is required.
Uncertainty	These columns are not required.
Source	
Calculation Method	This column is required.
CO2e Total	If the CO2 Value, CH4 Value, and N2O Value columns are populated, you do not have to populate this column. If they are not populated, this column is required. This column entry must be a positive number.
CO2 Other	This column is not required. This column entry must be a positive number.

Column	Requirement for Valid Import
CO2 Value	If you have populated the CO2e Total column, these columns are not required. If it is not populated, these columns are required. These column entries must be a positive numbers.
CH4 Value	
N2O Value	
CO2e Total Weight	These columns are required if you have populated the corresponding Value column. Refer to the Units of Measure to view all valid unit types and units.
CO2 Other Total Weight	
CO2 Total Weight	
CH4 Total Weight	
N2O Total Weight	

NOTE: All numeric column entries can have a maximum of 13 decimal places.

When you complete the template, follow these steps to import factors:

1. Click the **Download** button.
2. In the **File Upload** window, click the **BROWSE** button to open File Explorer.
3. Select the template and click the **Open** button.
4. Click the **Upload** button. All factors will display in the Factors grid.

    NOTE: Any updates to columns in the excel template will update in the corresponding Factors grid columns when the template is re-uploaded.

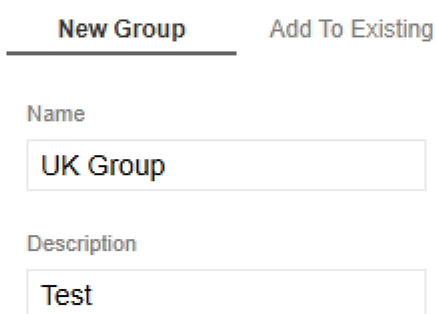
Assign Factors to Factor Groups

To assign external and internal factors to factor groups, click the **Add Factors to Group** button in the toolbar.

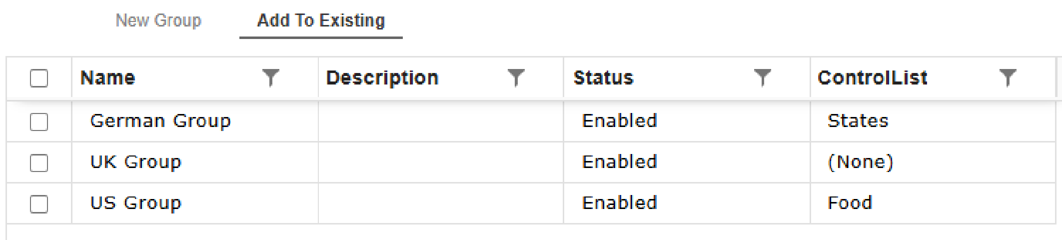
Complete the following steps for both external and internal factors:

1. Use the checkboxes to select the factors you want to assign and then click the **Add Factors to Group** button to display the slide-out.

    a. To add a factor to a new factor group, use the **New Group** tab. Add a **Name** and **Description** and then click the **Create & Add** button.

    b. To add a factor to an existing factor group, use the **Add to Existing** tab. Use the checkbox to select factor groups from the grid below or click the multi-select checkbox at the top of the grid to select all factor groups. Click the **Add** button.



	Name	Description	Status	ControlList
☐	German Group		Enabled	States
☐	UK Group		Enabled	(None)
☐	US Group		Enabled	Food

Alternately, factors can be added to factor groups from the Factor Groups page. See [Factor Groups](#)

The Factor Group(s) column displays which factor group is assigned to each factor.

	Name ↑1	Factor Grou... ↑2
☐	Accommodation	
☐	Accommodation	Group 2

> **NOTE:** To check the scope tagging for all factors, navigate to **Factor Groups** > **Properties**.

Factor Groups

Factor groups help you manage factors by enabling you to view relevant factors based on grouping criteria. Use the Factor Groups page to create groups of external and internal factors. Factor groups are assigned to sites to organize data collection. See [Sites](#).

- [Create a New Factor Group](#)
- [Manage Factor Groups](#)

Use the toolbar options to manage factor groups.

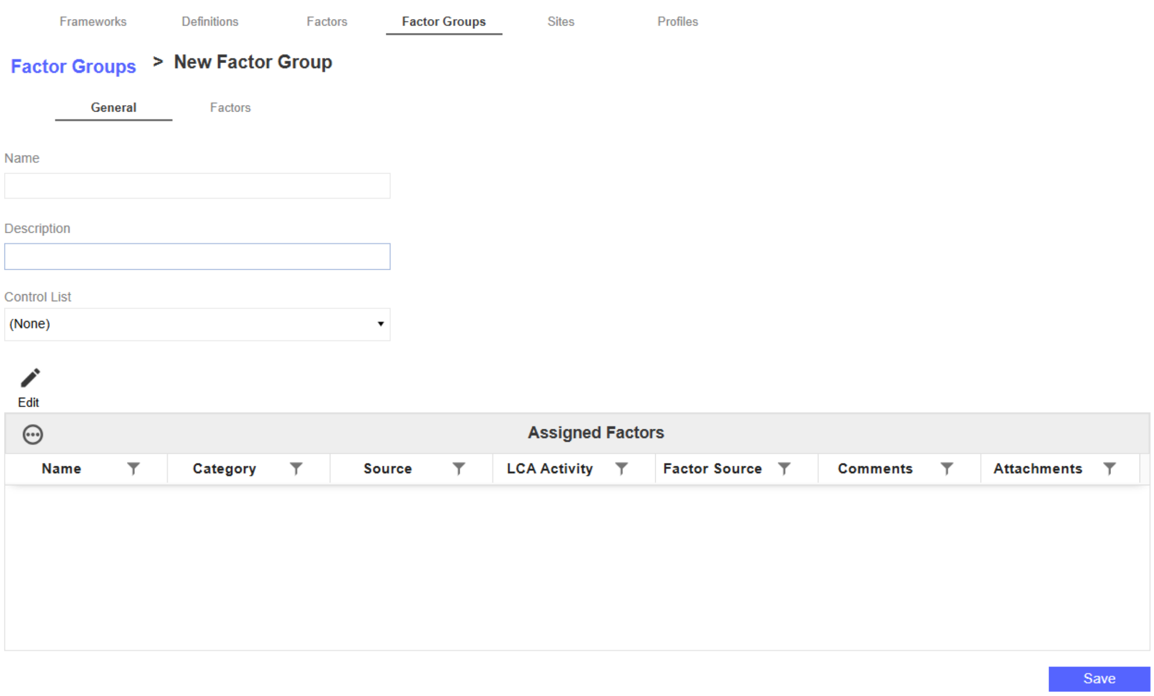
- To add a new factor group, click the **New** button
- To edit a factor group, click the **Edit** button
- To delete a factor group, click the **Delete** button.

> **NOTE:** Factor groups cannot be deleted if they are assigned to a site.

- To disable a factor group and prevent data entry, click the **Disable** button.
- To enable a factor group, click the **Enable** button

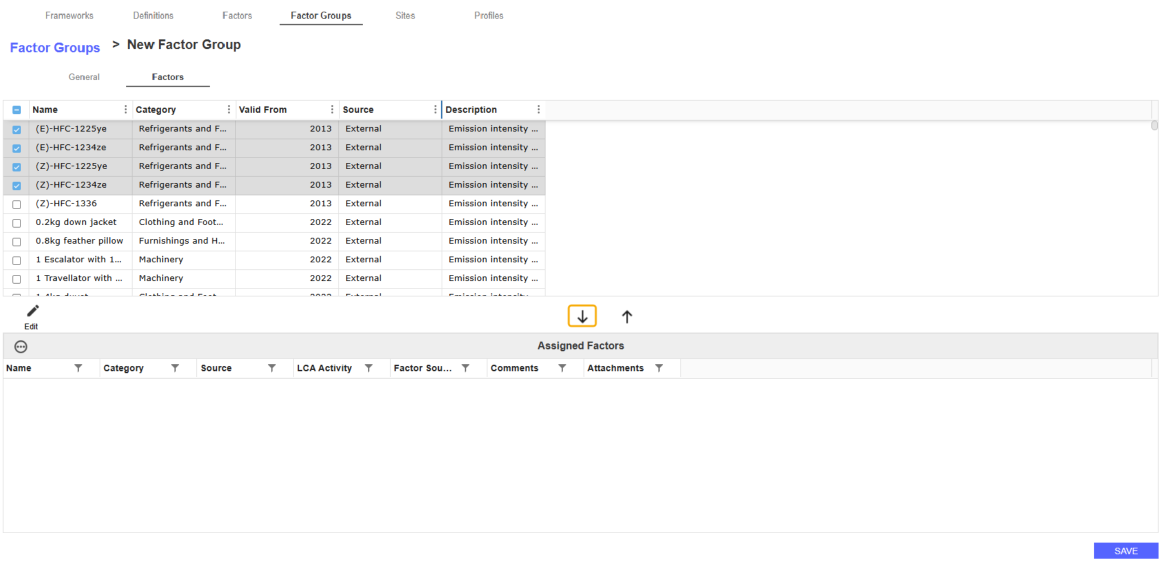
Create a New Factor Group

1. Click the **New** button to navigate to the **New Factor Group** page.



2. In the **General** tab, enter a factor group **Name** and **Description** . From the **Control List** drop-down menu, select a control list to assign to the factor group. This is optional. The control list will be applied to every factor in that factor group. See Control Lists.

3. To add a factor to the new factor group, select the **Factors** tab. The top grid displays a grouping of factors by activity ID and category. In the grid of available factors, select the checkbox next to the factor you want to assign. Click the **Add Factor** button. The factor will now display in the **Assigned Factors** grid for that factor group.



4. To edit properties from this page, select a factor from the **Assigned Factors** grid and click the **Edit** button. See Manage Factor Groups.

5. Click the **Save** button.

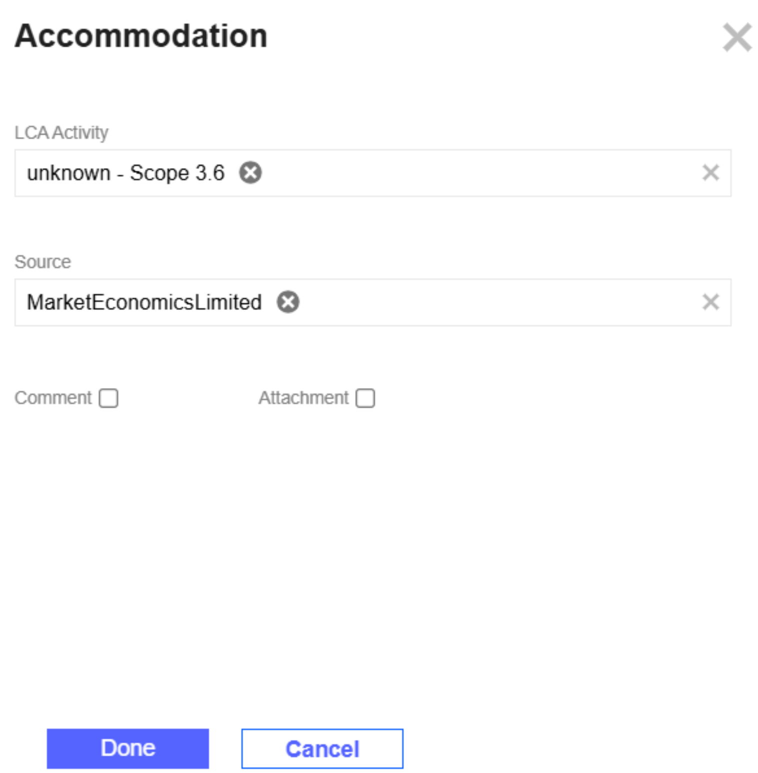
Manage Factor Groups

To edit a factor group, select the factor group you want to edit and click the **Edit** button. Use the General tab to edit factor group properties. Use the Factors tab to edit which factors are assigned to the factor group.

General

Use the fields to edit the factor group name, description, and control list assignment. The control list selected is applied to every factor in that factor group. See Control Lists.

Edit To edit properties, select a factor from the **Assigned Factors** grid and click the **Edit** button to display the slide-out.



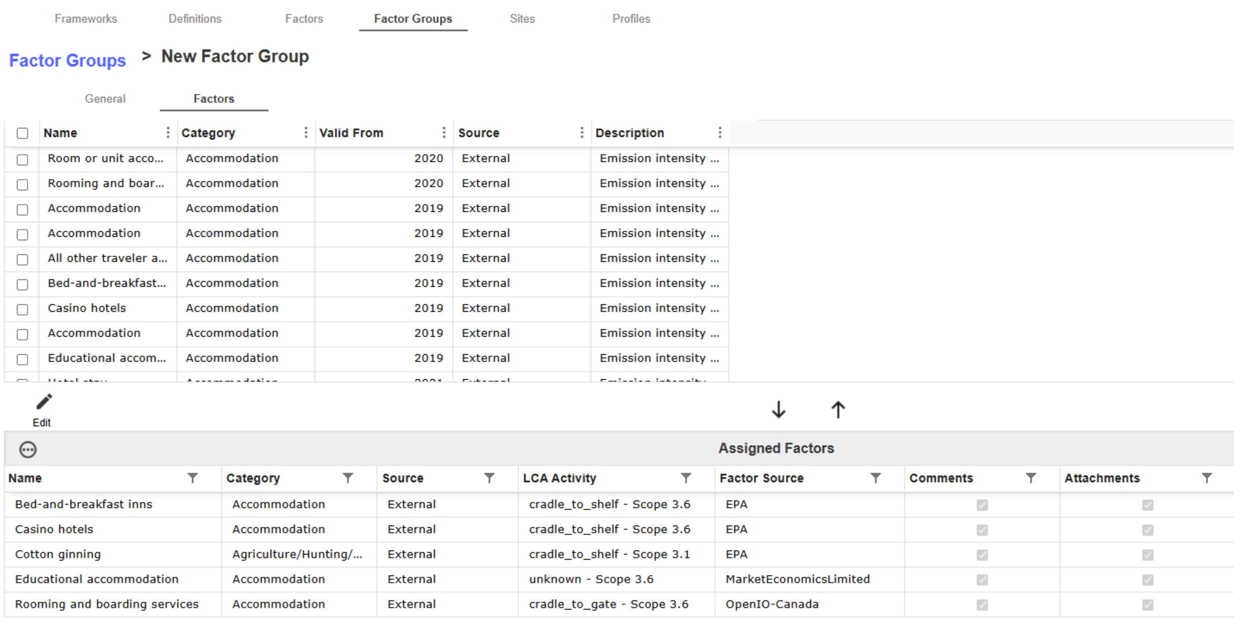
Property	Description
LCA Activity	Scope ID is included with LCA Activity. This selection determines activity and the corresponding factor scope for calculation. See Scope. If there is only one LCA Activity and Scope for the factor, the LCA Activity drop-down menu will default to that value. Some assigned factors have multiple potential scopes. For these factors, the LCA Activity drop-down menu defaults to the first value. You cannot add multiple scopes for one LCA Activity. If there are multiple LCA Activities associated with the selected factor, more than one scope can be selected from the LCA Activity drop-down menu. If you select multiple LCA Activities and scopes, you will enter data for each selection on the Home page.

Property	Description
	If the factor is internal, this field is a user defined value.
Source	The organization providing the factor. If you select multiple sources for a factor, you will enter data for each one on the Home page. The Source drop-down menu only shows sources that match factors with the selected LCA Activity. If the factor is internal, this field is a user defined value.
Comment	If Administrators want users to enter a comment for the factor, select the **Comment** checkbox. If this property is selected, when you enter data for the factor on the Home page, the entry cannot be saved until a comment is added.
Attachment	If Administrators want users to submit an attachment for the factor, select the **Attachment** checkbox. If this property is selected, when you enter data for the factor on the Home page, the entry cannot be saved until an attachment is added.

To save property selections, click the **Done** button and then click the **Save** button.

Factors

Two grids are displayed with factors. The top grid contains all available factors, and the bottom grid contains all factors already assigned to that factor group. The Assigned Factors grid has columns displaying the LCA Activity and Factor Scope.



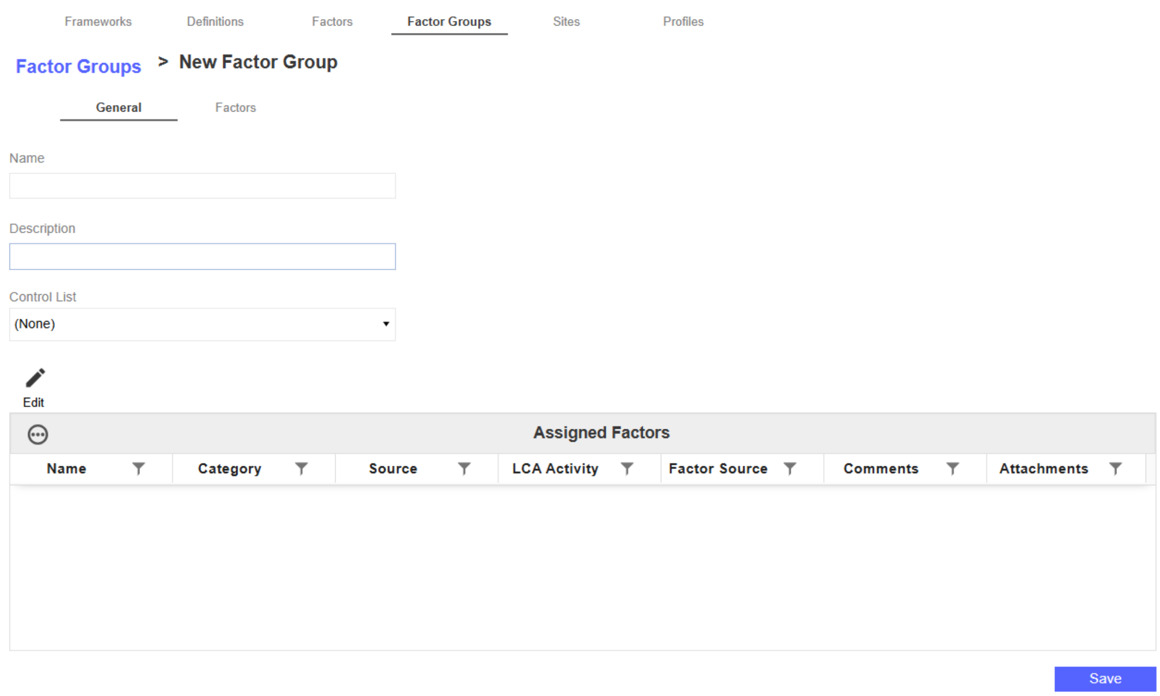
Edit To edit properties, select a factor from the **Assigned Factors** grid and click the **Edit** button to display the slide-out. See General.

Add and Remove Factors From Factor Group

- To add a factor to the selected factor group, select the checkbox next to the factor and then click the **Add Factor** button. The factor will now display in the **Assigned Factors** grid for that factor group. Click the **Save** button.
- To remove a factor from the selected factor group, select the factor from the **Assigned Factors** grid and then click the **Remove Factors** button. The factor will now display in the grid of available factors. Click the **Save** button.

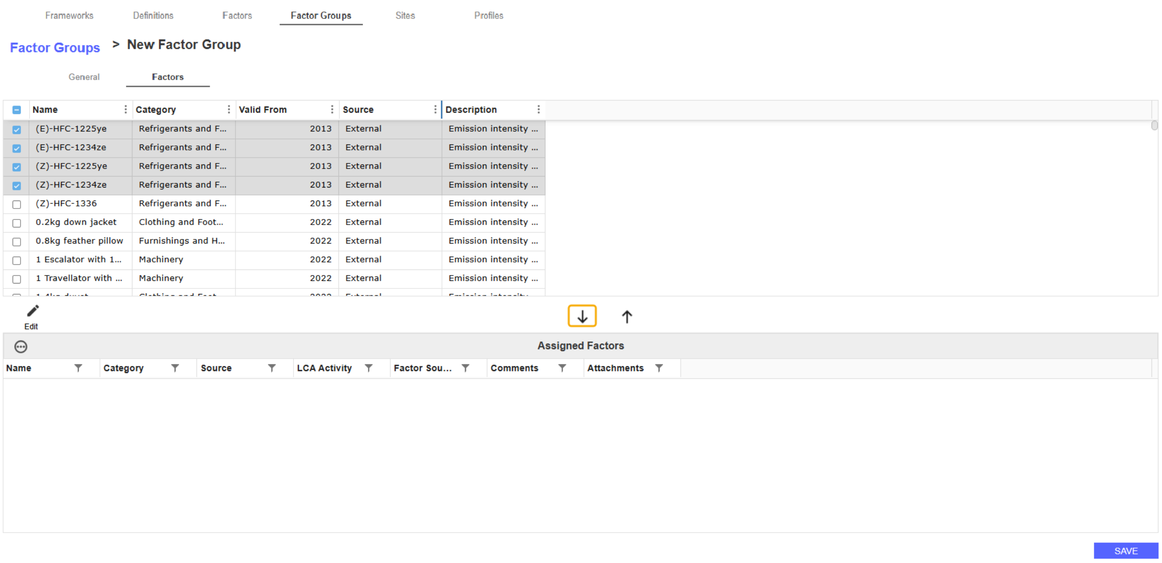
Create a New Factor Group

1. Click the **New** button to navigate to the **New Factor Group** page.



2. In the **General** tab, enter a factor group **Name** and **Description** . From the **Control List** drop-down menu, select a control list to assign to the factor group. This is optional. The control list will be applied to every factor in that factor group. See Control Lists.

3. To add a factor to the new factor group, select the **Factors** tab. The top grid displays a grouping of factors by activity ID and category. In the grid of available factors, select the checkbox next to the factor you want to assign. Click the **Add Factor** button. The factor will now display in the **Assigned Factors** grid for that factor group.



4. To edit properties from this page, select a factor from the **Assigned Factors** grid and click the **Edit** button. See Manage Factor Groups.

5. Click the **Save** button.

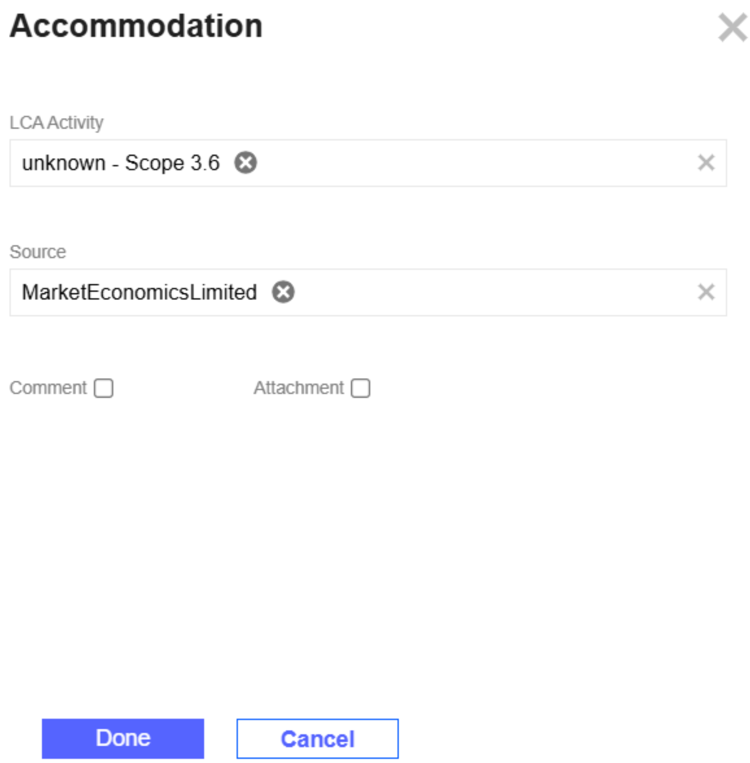
Manage Factor Groups

To edit a factor group, select the factor group you want to edit and click the **Edit** button. Use the General tab to edit factor group properties. Use the Factors tab to edit which factors are assigned to the factor group.

General

Use the fields to edit the factor group name, description, and control list assignment. The control list selected is applied to every factor in that factor group. See Control Lists.

Edit To edit properties, select a factor from the **Assigned Factors** grid and click the **Edit** button to display the slide-out.



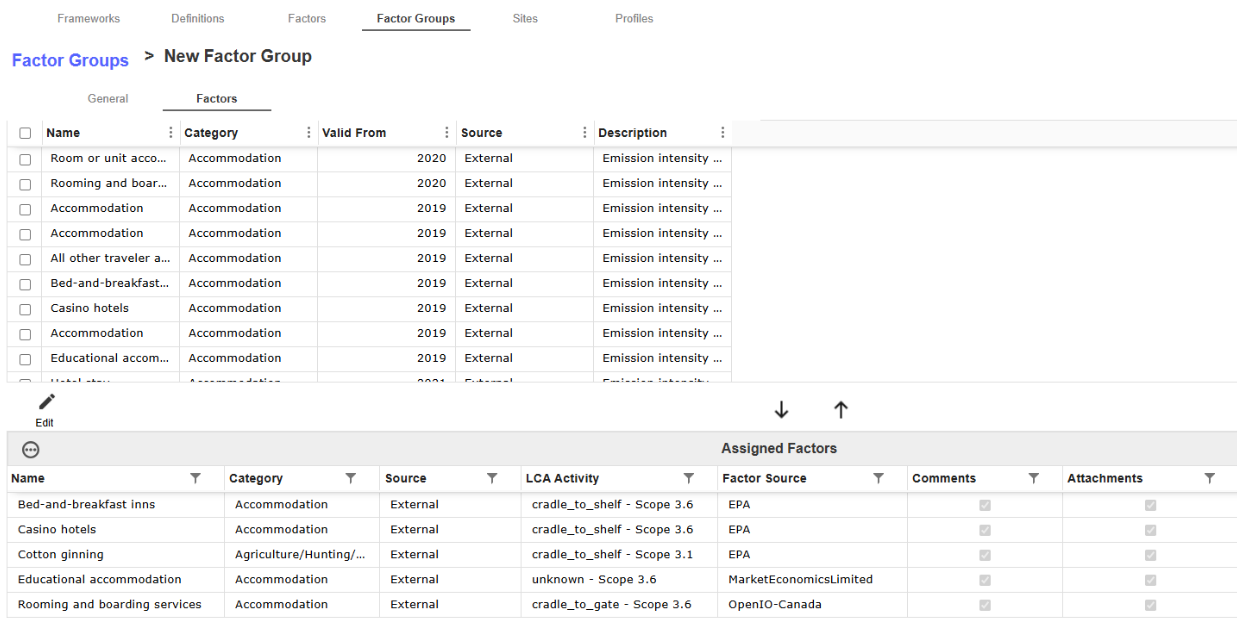
Property	Description
LCA Activity	Scope ID is included with LCA Activity. This selection determines activity and the corresponding factor scope for calculation. See Scope. If there is only one LCA Activity and Scope for the factor, the LCA Activity drop-down menu will default to that value. Some assigned factors have multiple potential scopes. For these factors, the LCA Activity drop-down menu defaults to the first value. You cannot add multiple scopes for one LCA Activity. If there are multiple LCA Activities associated with the selected factor, more than one scope can be selected from the LCA Activity drop-down menu. If you select multiple LCA Activities and scopes, you will enter data for each selection on the Home page.

Property	Description
	If the factor is internal, this field is a user defined value.
Source	The organization providing the factor. If you select multiple sources for a factor, you will enter data for each one on the Home page. The Source drop-down menu only shows sources that match factors with the selected LCA Activity. If the factor is internal, this field is a user defined value.
Comment	If Administrators want users to enter a comment for the factor, select the **Comment** checkbox. If this property is selected, when you enter data for the factor on the Home page, the entry cannot be saved until a comment is added.
Attachment	If Administrators want users to submit an attachment for the factor, select the **Attachment** checkbox. If this property is selected, when you enter data for the factor on the Home page, the entry cannot be saved until an attachment is added.

To save property selections, click the **Done** button and then click the **Save** button.

Factors

Two grids are displayed with factors. The top grid contains all available factors, and the bottom grid contains all factors already assigned to that factor group. The Assigned Factors grid has columns displaying the LCA Activity and Factor Scope.



Edit To edit properties, select a factor from the **Assigned Factors** grid and click the **Edit** button to display the slide-out. See General.

Add and Remove Factors From Factor Group

- To add a factor to the selected factor group, select the checkbox next to the factor and then click the **Add Factor** button. The factor will now display in the **Assigned Factors** grid for that factor group. Click the **Save** button.
- To remove a factor from the selected factor group, select the factor from the **Assigned Factors** grid and then click the **Remove Factors** button. The factor will now display in the grid of available factors. Click the **Save** button.

Sites

The Sites page enables you to map entities, factors, and roles to the correct locations. Sites function as a place to connect all your carbon activity data collection. The Sites page is where you will do your configuration for Scope 2.

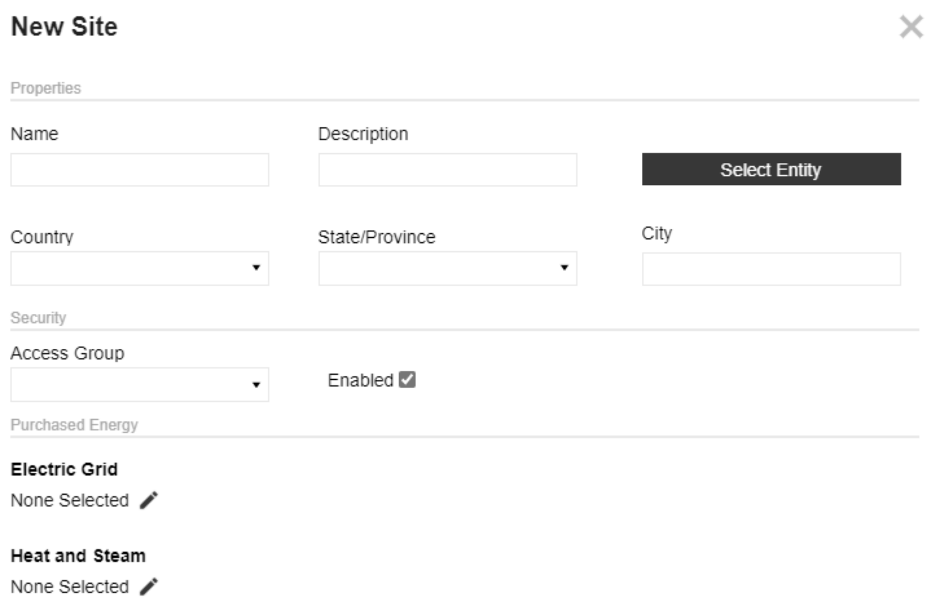
- Create a New Site
- Add Factor Groups to a Site

Use the toolbar options to manage sites.

- To add a new site, click the **New** button.
- To edit a site, click the **Edit** button.
- To delete a site, click the **Delete** button.

Create a New Site

1. Click the **New** button to display the **New Site** slide-out.



2. Fill in the Properties fields. A site Description is not required.

> **NOTE:** If the selected Country does not have a State/Province, the State/Province drop-down menu will say No data.

3. Click the **Select Entity** button.

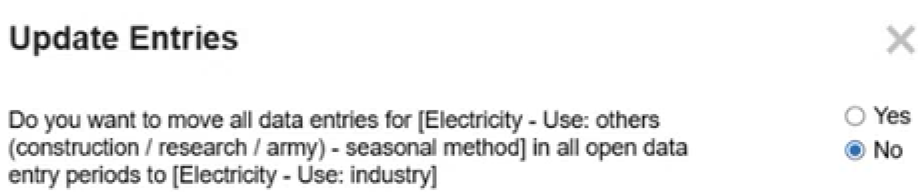
   a. In the **Select Member** window, under the **Hierarchy** tab, use the tree navigation to select an entity. Alternatively, use the **Search** tab to search for an entity. Click the **OK** button. You cannot select multiple entities.

4. Under **Security**, use the **Access Group** drop-down menu to assign an access group to the site. See [Access.](#)

5. The Enabled checkbox is selected by default. To disable the site, clear the **Enabled** checkbox.
6. Under **Purchased Energy**, select an Electric Grid and a Heat and Steam source.
    a. To select an Electric Grid, click the **Edit** button. In the **Select a Grid** slide-out, select a grid from the **Suggested Electric Grids** table. Click the **Done** button.
    b. To select a Heat and Steam source, click the **Edit** button. In the **Select a Heat/Steam Source** slide-out, select a source from the **Suggested Heat and Steam Sources** table. Click the **Done** button.

    > **NOTE:** Available Electric Grid and Heat and Steam options will display based on the location provided by the user. If there is more than one grid or source for that location, the user can choose from narrowed lists of Suggested Electric Grids and Suggested Heat and Steam Sources.
7. Click the **Save** button if you do not want to add any factor groups to the site. To add factor groups to a new site, click **Save and Add Factors**.

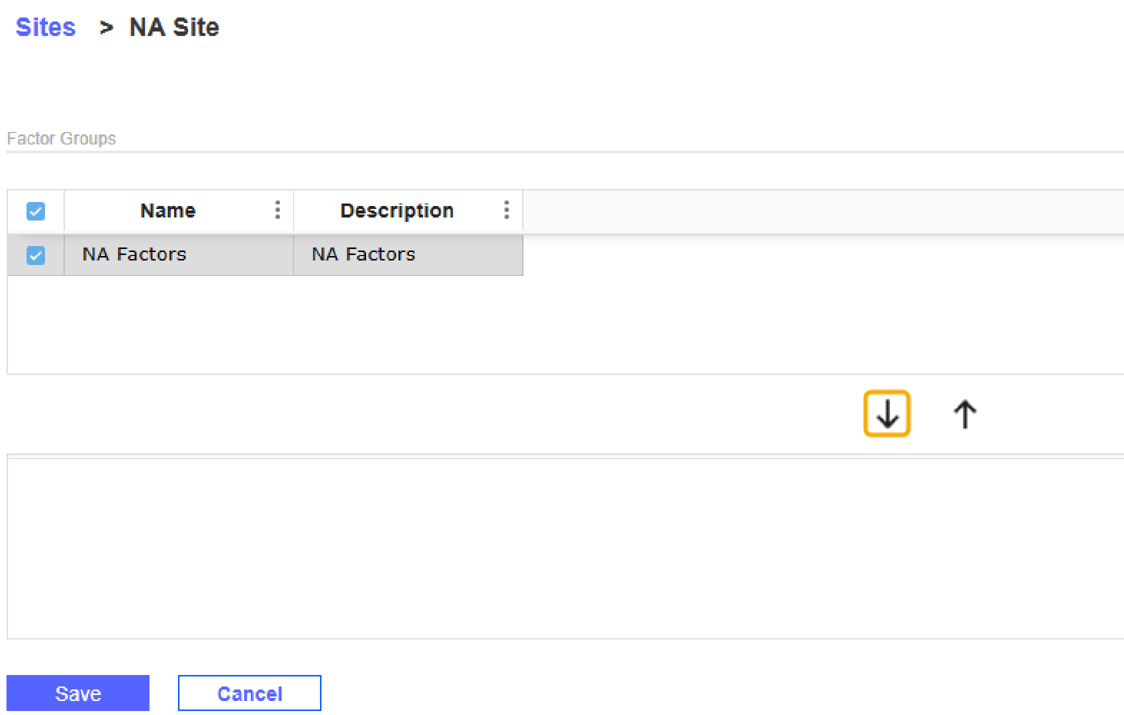
If you change the supplier for a site that already has data entered, you are asked if you want the data from the original supplier to migrate to the new supplier. If you select **Yes**, the data is moved in all open data entry periods. If you select **No**, then both suppliers display on the Home page for data entry. If you do not migrate the data, the data you enter for both suppliers will aggregate on the report. You cannot change supplier data if the Workflow is completed or if the profile is in the Completed status.



Add Factor Groups to a Site

1. Select the site from the **Sites** grid and click the **Edit** button.
2. Click the **Save and Add Factors** button from the slide-out. A grid is displayed showing factor groups.

3. Select the checkboxes next to the factor groups you want to assign to the site and then click the **Add** button. The factor groups are displayed in the grid below.



4. Click the **Save** button.

Profiles

Use the Profiles page to create profiles and assign definitions and sites. Profiles are the final step in the Administration journey. They bring your emission activity and framework data points together, combining all necessary data collection into one place. Profiles acts as a structure for managing and organizing data entry, giving users the flexibility to provide narrative at higher levels while collecting emission data at the site level. For example, a profile can be created for a location, and sites within that location can be assigned to that profile. Emission data is entered for factors assigned to those sites, and narrative is collected for the location based on reporting needs.

You can organize profile structure by determining reporting needs. For example, if you report on multiple frameworks, a profile can be created for each framework. Factor Group assignments can also determine different profile structures. Profiles display on the Home page in the Assigned Tasks grid and organize data entry tasks. See Home.

- Manage Profiles

Use the toolbar options to manage profiles.

- To add a profile, click the **New** button.
- To remove a profile, click the **Delete** button.
- To copy a profile, click the **Copy** button.

Manage Profiles

To create a profile, complete the following steps:

1. Click the **New** button to display the details pane.
2. In the **General** tab, enter profile properties.
    a. Enter a profile name and description. A Description is not required.
    b. The Enabled checkbox is selected by default. To disable the profile, clear the **Enabled** checkbox.

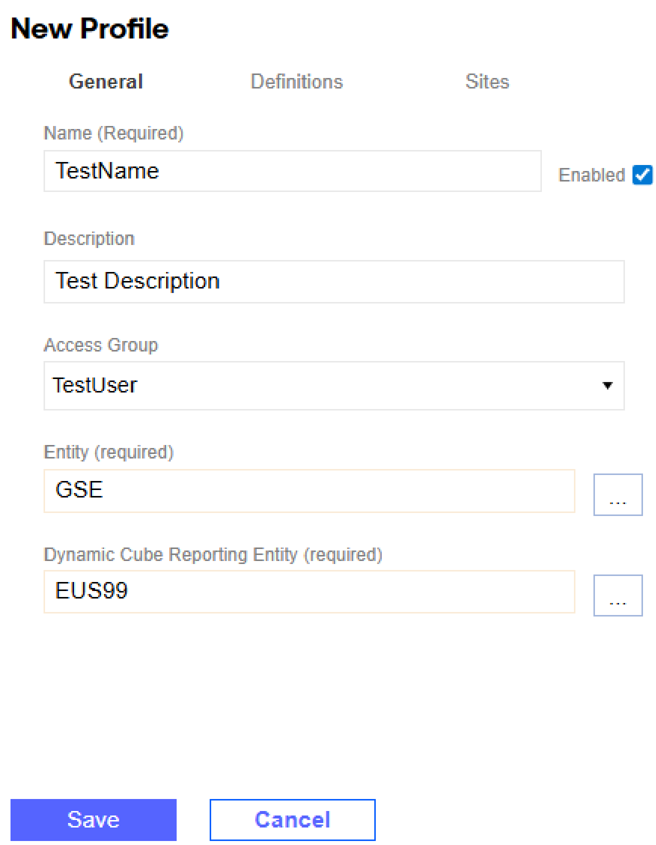
    > **NOTE:** Disabled profiles with statuses of Not Started, In Process, and Submitted do not display on the Home page. Disabled profiles with a Completed status will still display on the Home page.

    c. From the **Access Group** drop-down menu, select an access group for the profile. See Access.
    d. Assign an entity to the profile.
        i. Click the ellipses. In the **Select Member** window, under the **Hierarchy** tab, use the tree navigation to select an entity. Alternatively, use the **Search** tab to search for an entity. Click the **OK** button.

        > **NOTE:** You cannot select multiple entities. A profile must be made for each entity used.

    e. The Dynamic Cube Reporting Entity field populates automatically. If the entity selected is set to a base level member, then the dynamic cube reporting entity is set to the entity. If the entity selected is set to a parent level member, then the dynamic cube reporting entity is set to the first base level member under the parent. Click the ellipses and use the **Select Member** window to modify the reporting entity.

f. Click the **Save** button.



3. In the **Definitions** tab, assign definitions to the profile.

> **NOTE:** You cannot add definitions if you have not saved the profile.

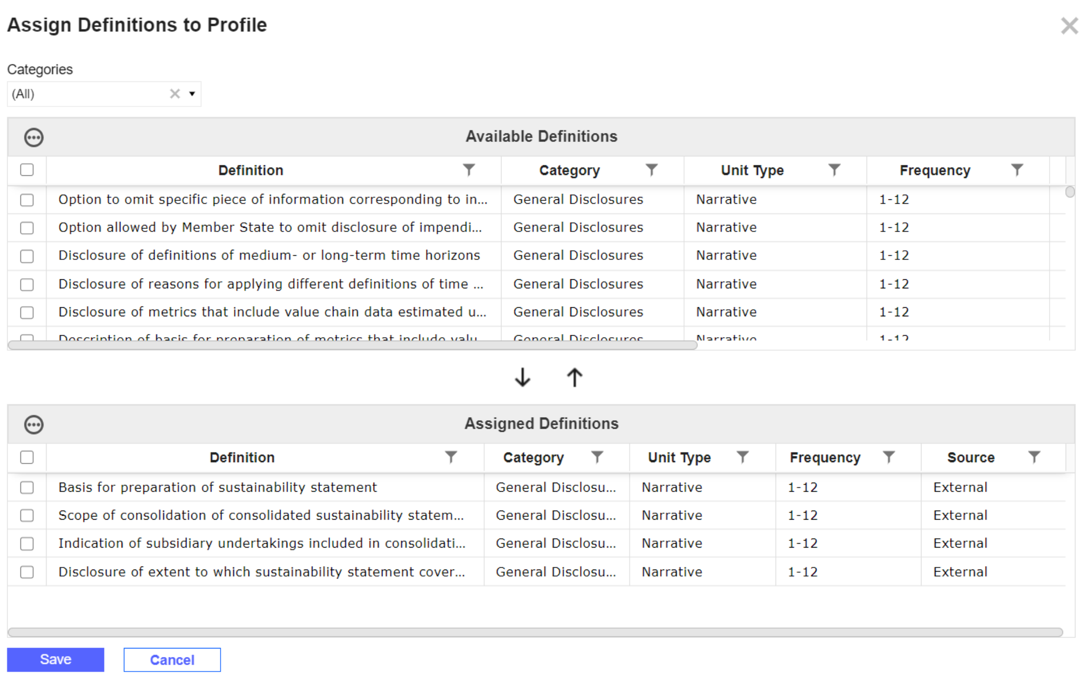
a. Click the **Edit** button to display the **Assign Definitions to Profile** slide-out.

b. To filter definitions, from the **Categories** filter, select a category from the drop-down menu. This filter defaults to (All).

c. In the **Available Definitions** grid, use the checkboxes to select definitions to add to the profile.

d. Click the **Add** button. The definitions will display in the **Assigned Definitions** grid. To remove definitions from the profile, in the **Available Definitions** grid, use the checkboxes to select definitions and then click the **Remove** button.

e. Click the **Save** button. The assigned definitions will display in the Definitions tab.



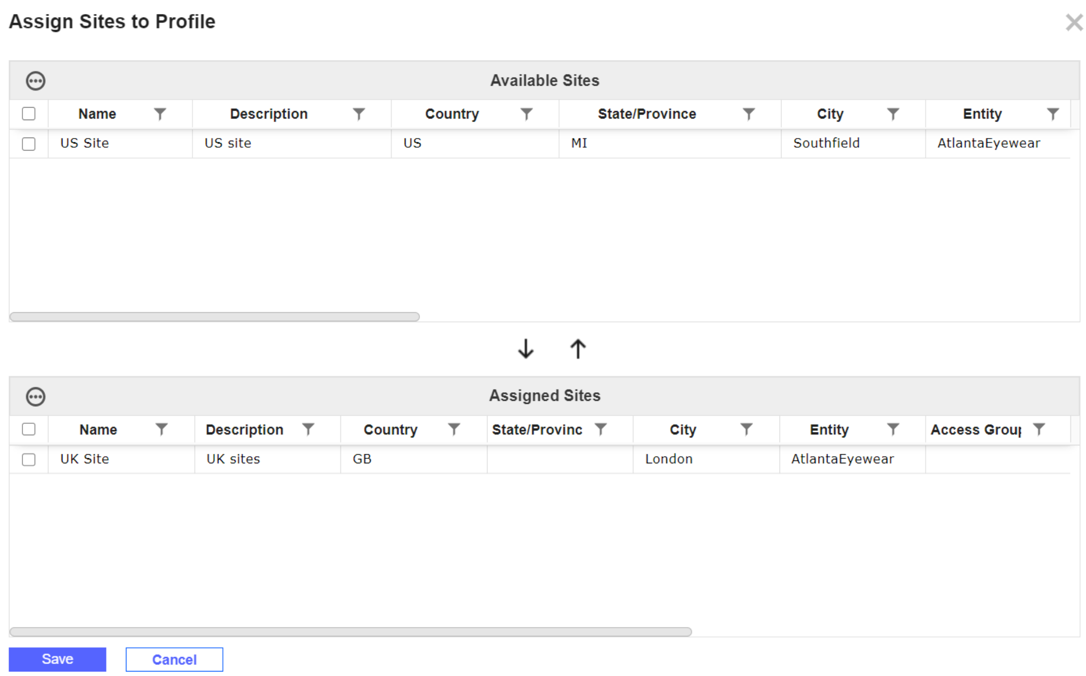
> **NOTE:** Definitions display in profiles based on their assigned frequency. See Definitions.

4. In the **Sites** tab, assign sites to the profile.

   a. Click the **Edit** button to display the **Assign Sites to Profile** slide-out.

   b. In the **Available Sites** grid, use the checkboxes to select sites to add to the profile. This table only lists sites under the entity selected for the profile.

c. Click the **Add** button. The sites will display in the **Assigned Sites** grid. To remove sites from the profile, in the **Available Sites** grid, use the checkboxes to select sites and then click the **Remove** button.



d. Click the **Save** button. The assigned sites will display in the Sites tab.

5. Click the **Save** button. The profile will display in the grid.

Copy Profiles

1. Select the profile you want to copy from the grid.

2. Click the **Copy** button.

3. Enter a profile name and description. A Description is not required. The Access Group and Entity are copied over from the selected profile.

4. To edit definition and site assignments, use the **Definitions** and **Sites** tabs. The copied profile will have the same definition and site assignments as the selected profile.
5. Click the **Save** button.

Home

Select the hamburger menu to navigate to the Home page.

Use the Home page to manage definition, emission, and utility data entry. Assigned data entry tasks are organized into profiles, and each profile is assigned an access group by an Administrator. The profile will display in the grid for all users within the access group assigned to that profile. There is one profile task for all users for the same workflow. If a user enters data for a profile task, the next user who manages that profile will see data entered for that task. See Profiles and Access.

- Profile Management
- Data Management
- Data Import

Profile Management

The Home page displays colored tiles for each profile status. Each tile shows the number of profiles with that status. The tiles function as filters that enable you to filter profiles by status. When you select a status tile, all profiles with that status display in the grid. To clear the filter, select the same tile again. The profile statuses are: Not Started, In Process, Submitted, and Completed.

When you select a profile from the grid, the Profiles pane displays the status progression of that profile. Completed statuses display with a checkmark. The current status of the profile is listed last and does not display a checkmark.

The access group a user is assigned to determines their view and usage of the Home page. See Access . Approvers, Preparers, and Viewers each have a different view of the details pane and have access to different options depending on the profile status.

> **NOTE:** The View button displays in all profile statuses for the View access group.

Task	Role	Status	Details Pane View
Create profile	Administrator	Not Started	**Approver**: the View button displays **Preparer**: the Manage button displays **NOTE:** You cannot submit a profile with a Not Started status.
Data entered and saved	Preparer	In Process	**Approver**: the View button displays **Preparer**: the Manage button displays

All data entered and submitted	Preparer	Submitted	**Approver**: the Manage button displays **Preparer**: the View button displays
Profile Approval Process			
Profile is approved	Approver	Completed	The View and Manage buttons do not display for all users.
Profile is rejected	Approver	In Process	**Approver**: the View button displays **Preparer**: the Manage button displays
A Completed profile is reverted	Approver	In Process	**Approver**: the View button displays **Preparer**: the Manage button displays

NOTE: The Revert button does not display for Completed profiles if the workflow is complete.

Data cannot be added or edited if the profile is in the Submitted or Completed status. When the profile has these statuses, the New and Edit icons do not display on the data entry tabs. To view data on these tabs when the profile status is Submitted or Completed, click the **View** button above the data entry grid.

Data Management

> **IMPORTANT:** Only users assigned to the Preparer access group can complete the following tasks on the Home page.

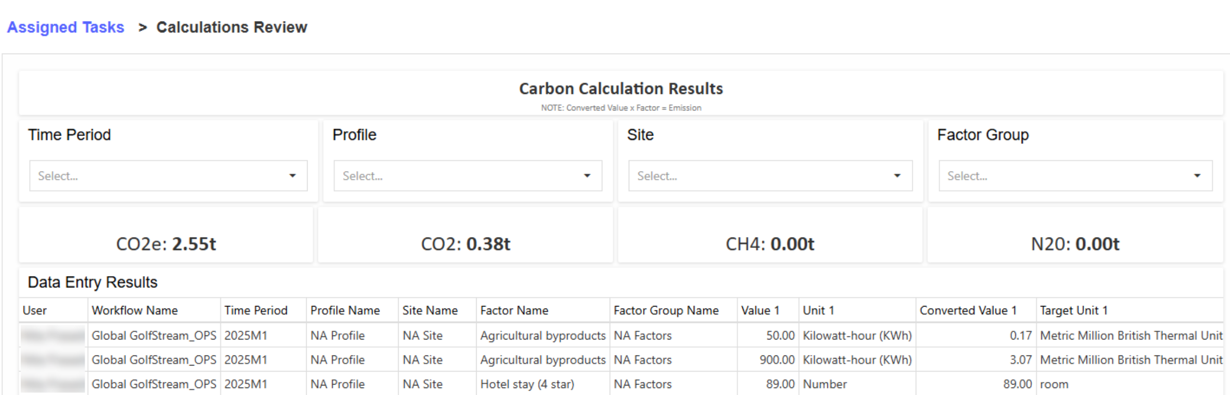
To enter data for a profile, select the profile from the grid and click the **Manage** button.

Administrators have the option to complete or revert a workflow using the Complete Workflow and Revert Workflow buttons. If the workflow is locked or completed, no data can be entered for that profile. If something is updated, like a factor or definition, the data will only update in open workflows while all data in locked or completed workflows remains the same.

For more information on workflow, see "Using OnePlace Workflow" in the *Design and Reference Guide.*

Carbon Calculations

To run carbon calculations for emissions factors, click the **Calculate** button. This button runs carbon calculations for the year and scenario selected in the Workflow POV and displays the results on a new page. The page displays header tiles that show the CO2e, CO2, CH4, and N2O totals. Only OneStreamand Solution Administrators can run calculations.



User	Workflow Name	Time Period	Profile Name	Site Name	Factor Name	Factor Group Name	Value 1	Unit 1	Converted Value 1	Target Unit 1
	Global GolfStream_OPS	2025M1	NA Profile	NA Site	Agricultural byproducts	NA Factors	50.00	Kilowatt-hour (KWh)	0.17	Metric Million British Thermal Unit
	Global GolfStream_OPS	2025M1	NA Profile	NA Site	Agricultural byproducts	NA Factors	900.00	Kilowatt-hour (KWh)	3.07	Metric Million British Thermal Unit
	Global GolfStream_OPS	2025M1	NA Profile	NA Site	Hotel stay (4 star)	NA Factors	89.00	Number	89.00	room

Data Entry

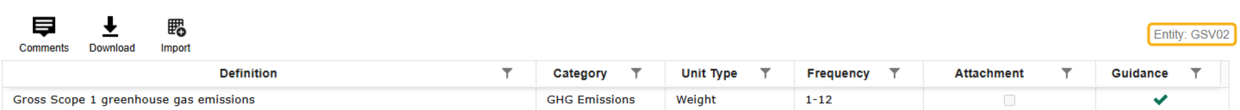
There are three tabs for data entry: Definitions, Emissions, and Utilities. Navigate to the following topics for the data entry process. To download a data entry template and import your data for definitions, emissions, and utilities, see Data Import.

- Definition Data Entry
- Emission Data Entry
- Utility Data Entry
- Delete a Data Entry
- Attachments and Comments

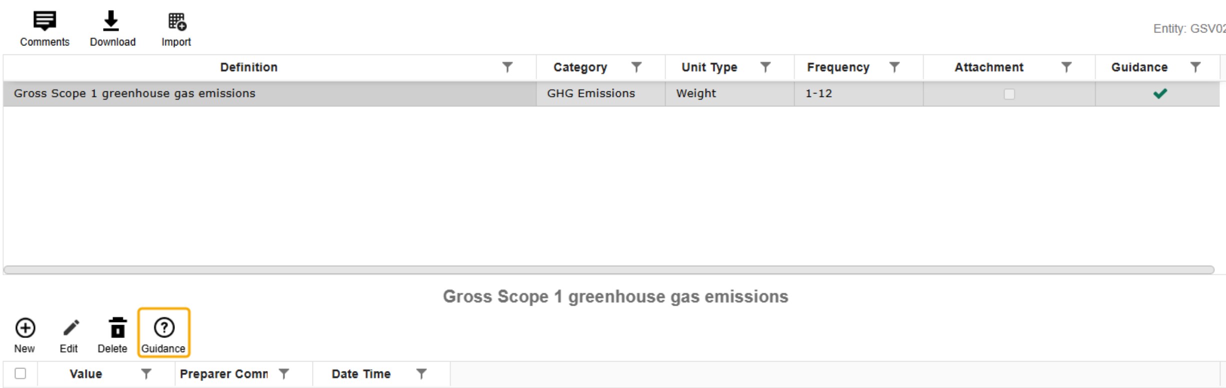
> **NOTE:** If a user is in the access group for a site, but not in the access group for the profile that site is assigned to, the profile will still display in the grid. They can enter data in the Emissions and Utilities tabs, but the Definitions tab will not display data.

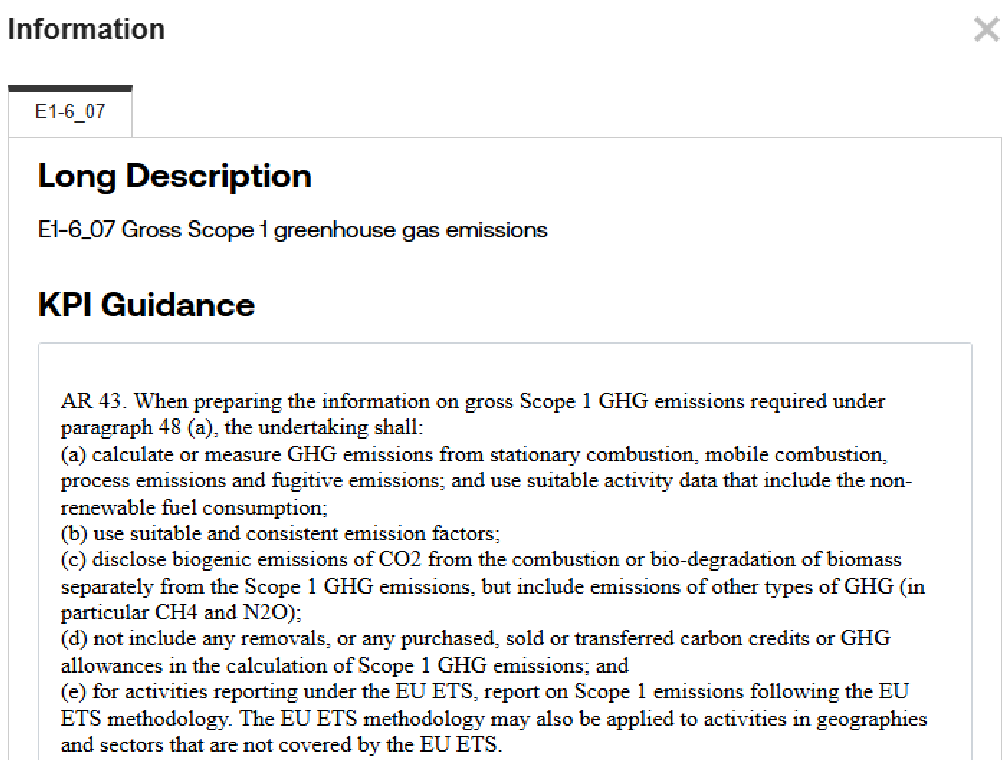
Definition Data Entry

This tab displays a grid of all definitions assigned to the profile that require either a narrative or value entry. The entity assigned to the profile displays above the definitions grid.



Some definitions have regulation guidance available for you to view. If there is a checkmark in the Guidance column for a selected definition, the Guidance icon displays. Click the **Guidance** button to display the **Information** slide-out for the definition.



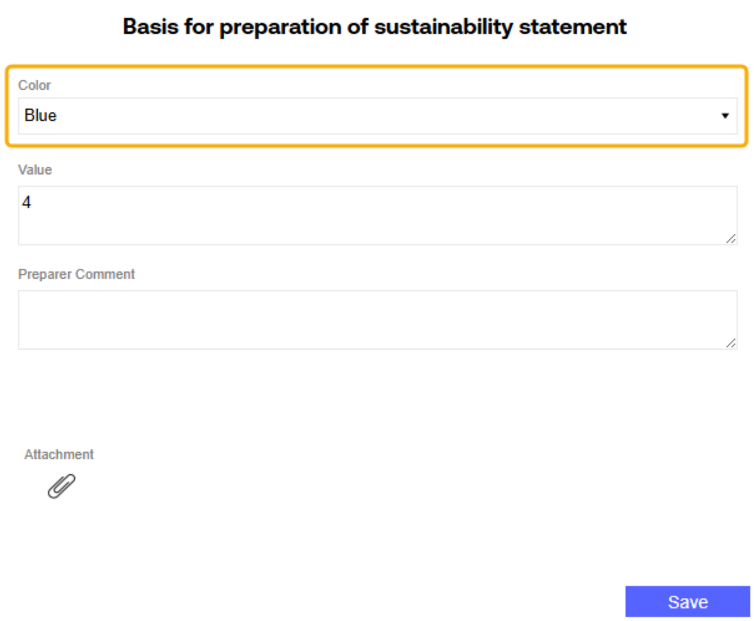


NOTE: If the definition is associated with multiple guidance records, multiple tabs display in the slide-out.

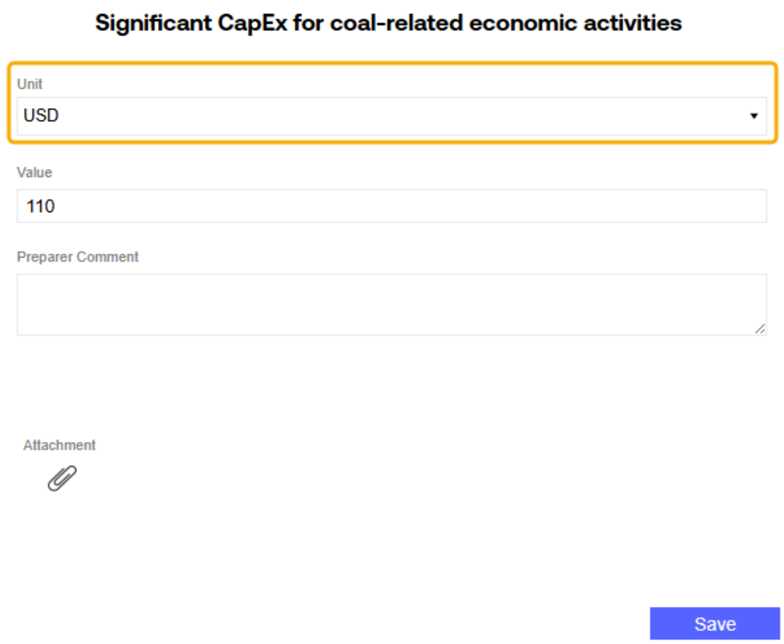
To enter data for a definition, complete the following steps:

1. Select a definition from the grid.
2. Click the **New** button to add an entry.
3. Enter all data for the definition in the slide-out.
    a. If control lists are assigned to the definition, there will be drop-down menus with the titles of the control lists. You can assign a maximum of four control lists to a definition. Make control list member selections from the available drop-down menus to enter data for that selection. See Control Lists.

    Control list drop-down menus do not display if none are assigned to the definition. You must create a new entry for every control list member you are entering data for.

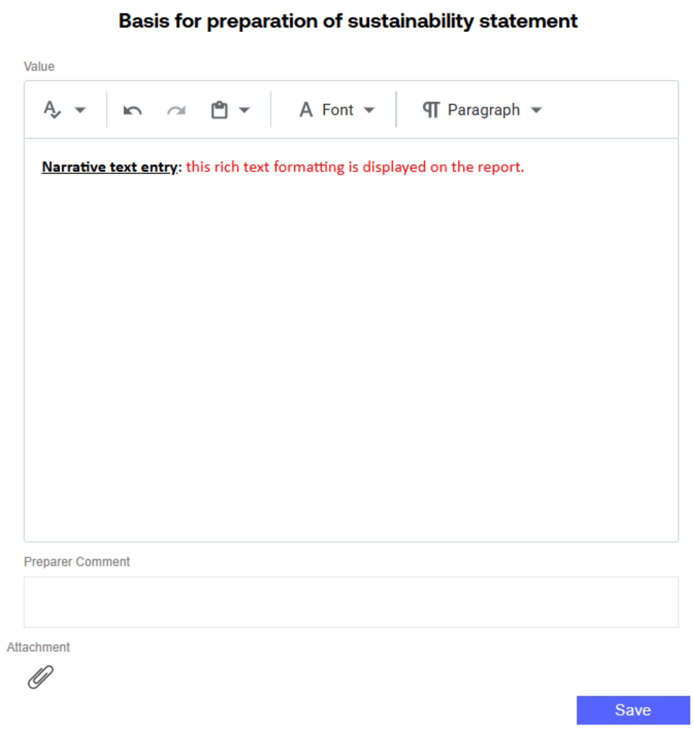


    b. If the definition unit type requires a unit selection, from the **Unit** drop-down menu, select a unit. If the definition unit type does not require a unit selection, the Unit drop-down menu does not display. The following definition unit types require a unit selection: area, data, distance, energy, time, volume, weight, and monetary.



c. In the **Value** field, enter a value for the entry. You cannot enter a numeric value exceeding 7.9228×10^{28}.

   For definitions with a Narrative unit type, this field displays as a text box. The text box supports line breaking and rich text formatting. The rich text formatting is displayed on the report for narrative entries. If the narrative entry is set to display in a table, then the rich text formatting is not applied. Narrative entries display in a table if the definition has any of the following applied: Control Lists, Baseline, Prior Year, or Milestone Year.



> **NOTE:** If there are multiple narrative entries for a definition, the most recent entry will be used in the report. This is regardless of the workflow period the narrative is entered for.

d. Add an attachment or Preparer comment if required. If an attachment or comment is required for the definition, the entry cannot be saved until an attachment or comment is added. See Attachments and Comments.

4. When you finish entering data for the definition, click the **Save** button.

> **NOTE:** Multiple entries for a definition will aggregate on the report if the definition has a numeric input type and if there are no control lists, baseline years, or milestone years assigned to the definition.

If the definition you are entering data for has the Baseline, Prior Year, or Milestones options selected on the Definitions page, the entry grid has additional columns to display data.

Baseline 2025	Prior 2026	N	N-(N-1)	% N/(N-1)	Target 2025	Target 2030
453.51	1,000	25	-975	-97.5%		24
95.86	408.16	100	-308.16	-75.5%	136.05	101
5,000	3,000	362.81	-2,637.19	-87.91%	408.16	327.46
2,721.55	40	2,000	1,960	4,900%		2,100

Column	Description
Baseline	Users must enter their baseline year, prior year, and target year data on the Home page in the Workflow Profile for the appropriate year and scenario. The columns populate based on this data entry. If there is no data provided for the baseline year, prior year, or milestone scenarios selected in Global Options, the corresponding columns will be blank.
Prior	
Target	
N	This column displays the value for the current year.
N-(N-1)	This column displays the variance between the Current year (N) and the Prior year (N-1).
% N/(N-1)	This column displays the percent change between the Current year (N) and the Prior year (N-1).

Emission Data Entry

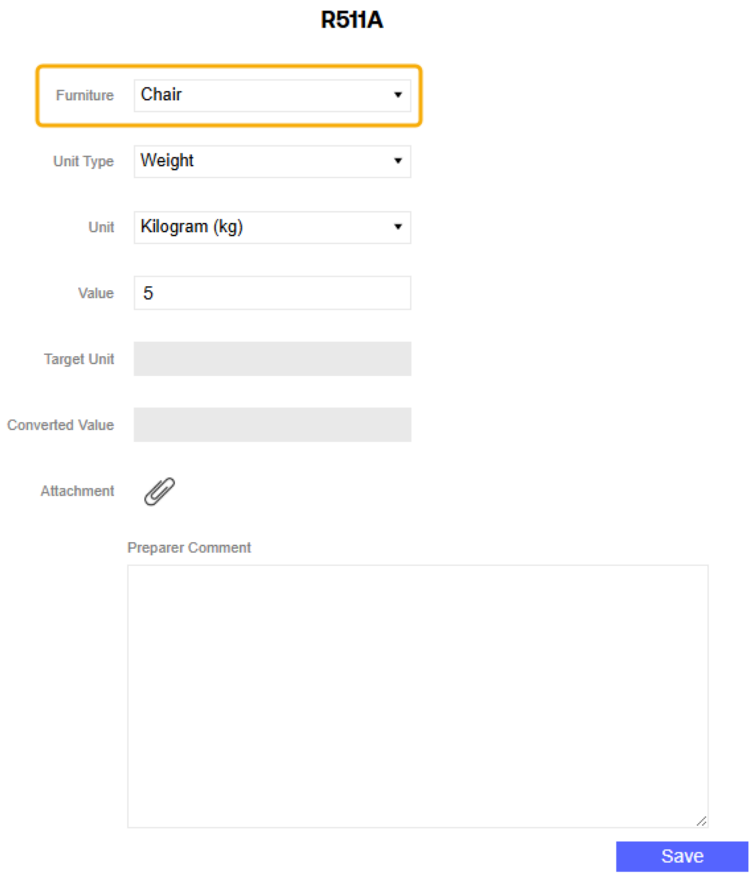
This tab displays a grid of factors and a grid of each entry made for that factor.

To display data on the Emissions page, from the **Site** drop-down menu, select a site. From the **Factor Group** drop-down menu, select a factor group or select **(All)**. All factors within that selection display in the grid. Once you select a site, the country and state/city assigned to the site will display above the grid.

To enter data for factors, complete the following steps:

1. Select a factor from the grid and then click the **New** button to add an entry for that factor.
2. Enter all emissions data in the slide-out.
    a. If a control list is assigned to the factor, there will be a drop-down menu with the title of the control list. Select a control list member from the drop-down menu to enter data for that member. See Control Lists.

    This drop-down menu does not display if no control list is assigned. You must create a new entry for every control list member you are entering data for.



b. The Unit Type drop-down menu defaults to the unit type assigned to that factor. You can use the **Unit Type** drop-down menu to select a different unit type if needed. Only valid unit types for that factor are displayed.

c. From the **Unit** drop-down menu, select a unit. Only valid units for that unit type are displayed

d. In the **Value** field, enter a value for the factor entry. You cannot enter a numeric value exceeding 10^{19}-1. Converted values also cannot exceed this number.

e. Add an attachment or Preparer comment if required. If an attachment or comment is required for the factor, the entry cannot be saved until an attachment or comment is added. See Attachments and Comments.

> **NOTE:** The Target Unit and Converted Value fields cannot be edited. Once you save the entry, these values will display in the corresponding column grids.

3. Click the **Save** button.

For factors that require multiple inputs, for example AreaOverTime, two Unit Type and Unit drop-down menus display for selection, and two Value fields display for data entry.

Utility Data Entry

This tab displays a grid with the two utilities supported for data entry: Electricity and Heat and Steam. To display data on the **Utilities** page, from the **Sites** drop-down menu, select a site. The two utilities display in the grid. If the site is only assigned one utility, that single utility displays in the grid. If no utilities are assigned to the site, the grid is blank. See Sites. Once you select a site, the country and state/city assigned to the site display above the grid.

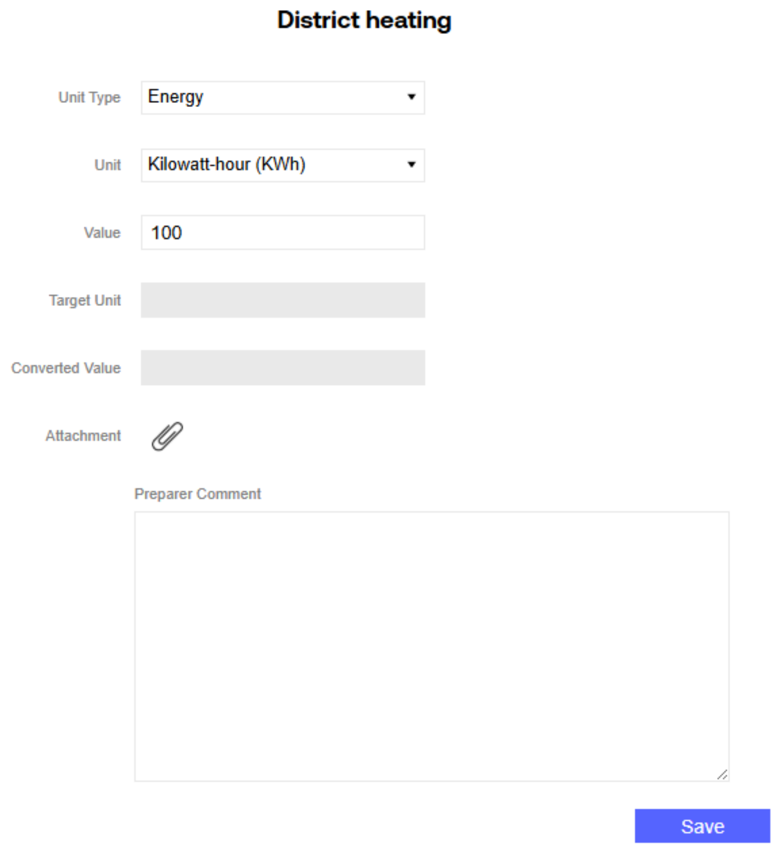
If a supplier has been changed on the Sites page, Preparers can enter and update data for both suppliers if they did not migrate all data to the new supplier.

To enter data for utilities, complete the following steps:

1. Select a utility from the grid and then click the **New** button to add an entry for that utility.
2. Enter all utility data in the slide-out.
   a. The Unit Type drop-down menu defaults to Energy. No selection is needed.
   b. From the **Unit** drop-down menu, select a unit.
   c. In the **Value** field, enter your value for the utility. The value must be numeric. You cannot enter a value exceeding 10^{19}-1. Converted values also cannot exceed this number

      > **NOTE:** The Target Unit and Converted Value fields cannot be edited. Once you save the entry, these values will display in the corresponding column grids.

   d. Add an attachment or Preparer comment if needed. If an attachment or comment is required, the entry cannot be saved until an attachment or comment is added. See Attachments and Comments..

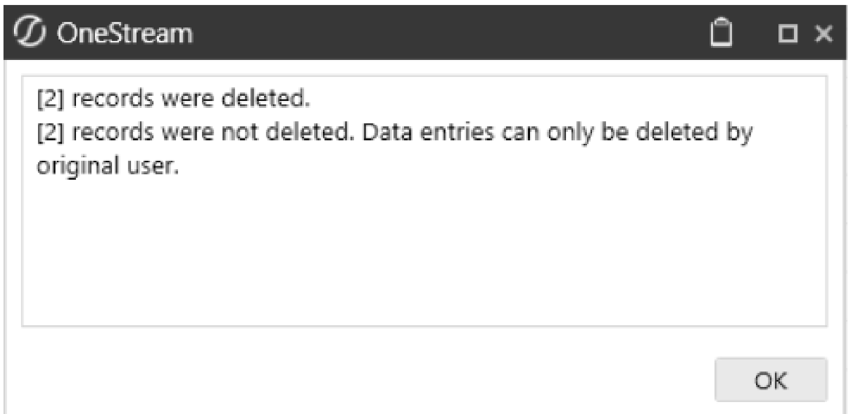


3. Click the **Save** button.

Delete a Data Entry

To delete an entry from the grid in the Definitions, Emissions, or Utilities tabs, click the **Delete** button.

Use the checkboxes to multi-select entries to delete. Preparers can only delete entries that they created. If a Preparer multi-selects entries to delete and did not create all entries selected, only the entries they created are deleted. Only Solution Administrators can delete entries they did not create.



NOTE: Entries can only be deleted if the profile is in the In Process status.

Attachments and Comments

Use the Attachment icon to add, delete, and view attachments.

- To add an attachment, click the **Add** button.
- To delete an attachment, click the **Delete** button. Attachments can only be deleted by the one who uploaded the attachment.
- To view an attachment, click the **View** button.

To add an attachment, complete the following steps:

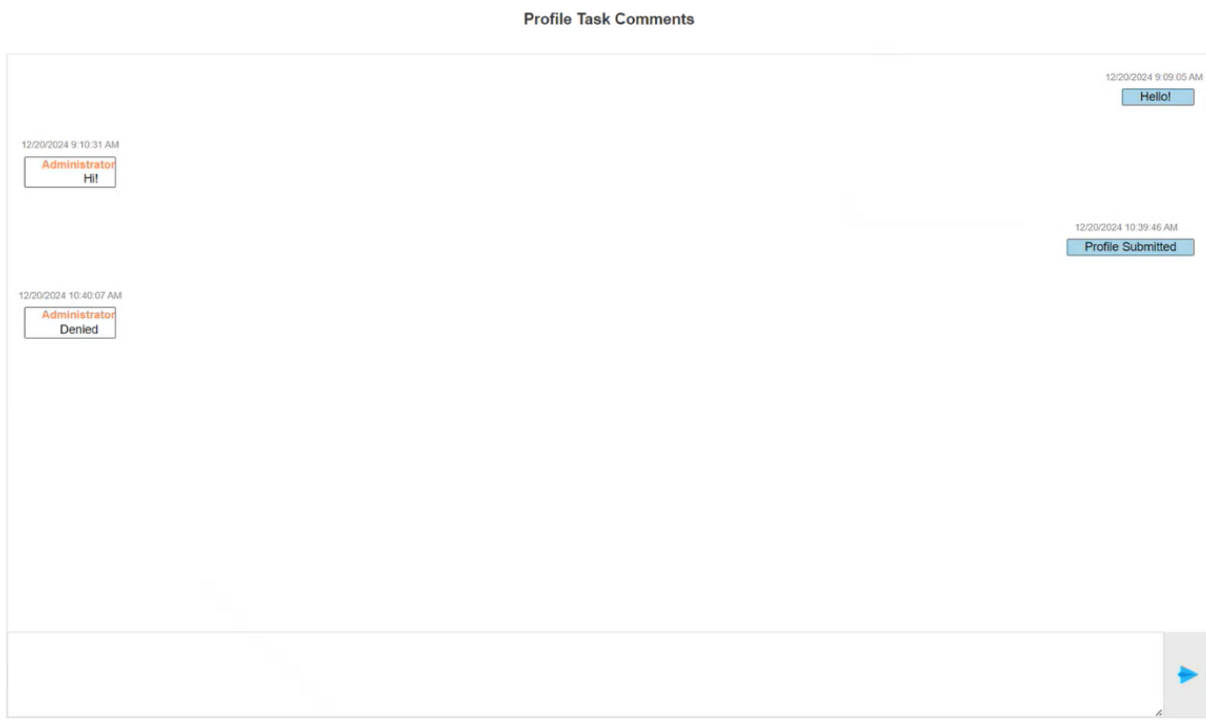
1. Navigate to either the **Definitions** tab, the **Emissions** tab, or the **Utilities** tab.
2. Select an entry from the bottom grid and click the **Edit** button, or create a new entry.
3. Click the **Attachment** button to display the **Attachments** slide-out.
    a. Click the **Add** button
    b. In the **File Upload** window, click the **BROWSE** button to open **File Explorer**.
    c. Select the file and click the **Open** button.
    d. Click the **Upload** button. The attachment is displayed in the grid.
    e. Click the **Close** button.
4. Click the **Save** button.

> **NOTE:** If an attachment is required, you cannot save the entry until an attachment is uploaded.

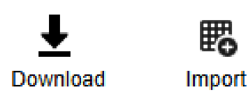
Manage Comments

Use the Comments icon to enter profile level comments. All comments entered and saved will display in the Profile Task Comments slide-out on each data entry tab. Users can add comments and reply to comments saved by other users.

To add a comment, click the **Comments** button to display the **Profile Task Comments** slide-out. Enter a comment in the text box and then click the **Send** button. The comment will display in the chat. Each message will display the user who sent the comment and the date and time the comment was sent.



Data Import



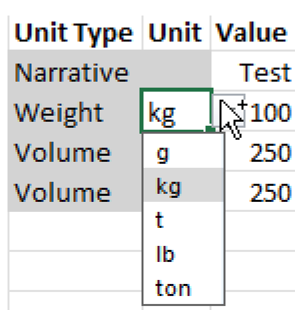
Use the Download and Import icons to download a data entry template and import your data for definitions, emissions, and utilities.

Considerations

- Only Preparers with access to the profile can import definition, emission, and utility data. The Download and Import icons are inactive for Viewers and Approvers.
- Data can only be imported to profiles that are in the Not Started or In Process status. If the profile is in the Submitted or Completed statuses, the icons are inactive.
- A Preparer with access to the site and not the profile can only import emissions and utilities data.
- Templates can only be imported to the profile they were initially downloaded from.
- If you do not want to import data for all pre-populated items in the template, you can delete the rows you do not need.

Definitions Data Import Template

The template will only populate definitions assigned to the time period selected in the Workflow. Templates can only be imported to the corresponding time period, unless all time periods have the same definitions assigned to them.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Definition</td><td rowspan="8">These columns are pre-populated based on selections made in the Definitions page. This data cannot be edited or deleted. See Definitions Details Pane.</td></tr>
<tr><td>Category</td></tr>
<tr><td>Frequency</td></tr>
<tr><td>Control List 1</td></tr>
<tr><td>Control List 2</td></tr>
<tr><td>Control List 3</td></tr>
<tr><td>Control List 4</td></tr>
<tr><td>Unit Type</td></tr>
<tr><td>Control List Value 1</td><td rowspan="5">These columns have drop-down menus enabling you to select valid control list and unit values. If the definition input type does not require a unit, this column is grayed out.

</td></tr>
<tr><td>Control List Value 2</td></tr>
<tr><td>Control List Value 3</td></tr>
<tr><td>Control List Value 4</td></tr>
<tr><td>Unit</td></tr>
</table>

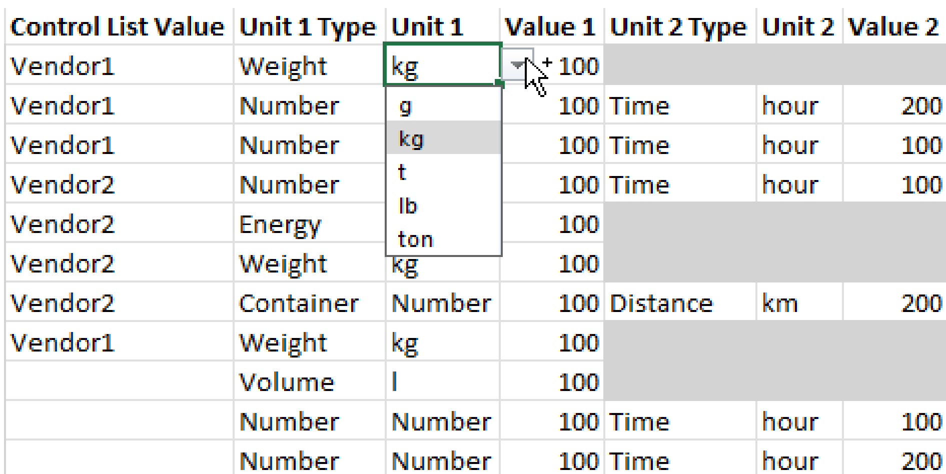
Column	Description
Value	Enter your value in this column.
Attachment Required	This column lists whether an attachment is required for the definition. If an attachment is required, you will receive a reminder to upload attachments for all required definitions after the import. The profile will not submit unless these required attachments are uploaded to the appropriate definitions.
Preparer Comment	This column is optional.

Emissions Data Import Template

Column	Description
Site	These columns are pre-populated. This data cannot be edited or deleted.
Factor Group	
Factor	
Control List	

Column	Description
Factor LCA Activity	These columns have drop-down menus enabling you to select entries if multiple LCA Activities or Sources were selected when configuring the factor group. See Factor Groups.
Factor Source	

Site	Factor Group	Factor LCA Activity	Factor Source
NA Site	NA Factors	unknown	Greenview
NA Site	NA Factors	unknown	Greenview
NA Site	NA Factors	unknown	Greenview
NA Site	NA Factors	unknown	Greenview
NA Site	NA Factors	cradle_to_shelf	EPA
NA Site	NA Factors	biogenic_co2_combustion	EPA
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	EPA
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	GHG Protocol
NA Site	NA Factors	biogenic_co2_combustion	EPA

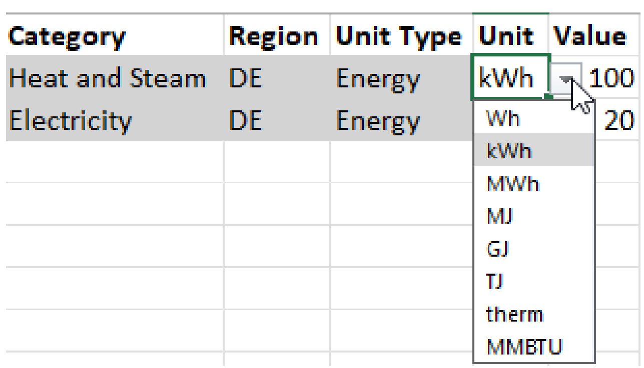
<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Control List Value</td><td rowspan="5">These columns have drop-down menus enabling you to select valid control list, unit type, and unit values. The Control List Value, Unit Type 1, Unit 1, and Value 1 columns are required. Unit Type 2 and Unit 2 are only required if the unit requires two unit selections, such as AreaOverTime.

<table>
<tr><th>Control List Value</th><th>Unit 1 Type</th><th>Unit 1</th><th>Value 1</th><th>Unit 2 Type</th><th>Unit 2</th><th>Value 2</th></tr>
<tr><td>Vendor1</td><td>Weight</td><td>kg</td><td>100</td><td></td><td></td><td></td></tr>
<tr><td>Vendor1</td><td>Number</td><td></td><td>100</td><td>Time</td><td>hour</td><td>200</td></tr>
<tr><td>Vendor1</td><td>Number</td><td></td><td>100</td><td>Time</td><td>hour</td><td>100</td></tr>
<tr><td>Vendor2</td><td>Number</td><td></td><td>100</td><td>Time</td><td>hour</td><td>100</td></tr>
<tr><td>Vendor2</td><td>Energy</td><td></td><td>100</td><td></td><td></td><td></td></tr>
<tr><td>Vendor2</td><td>Weight</td><td>kg</td><td>100</td><td></td><td></td><td></td></tr>
<tr><td>Vendor2</td><td>Container</td><td>Number</td><td>100</td><td>Distance</td><td>km</td><td>200</td></tr>
<tr><td>Vendor1</td><td>Weight</td><td>kg</td><td>100</td><td></td><td></td><td></td></tr>
<tr><td></td><td>Volume</td><td>l</td><td>100</td><td></td><td></td><td></td></tr>
<tr><td></td><td>Number</td><td>Number</td><td>100</td><td>Time</td><td>hour</td><td>100</td></tr>
<tr><td></td><td>Number</td><td>Number</td><td>100</td><td>Time</td><td>hour</td><td>200</td></tr>
</table></td></tr>
<tr><td>Unit Type 1</td></tr>
<tr><td>Unit Type 2</td></tr>
<tr><td>Unit 1</td></tr>
<tr><td>Unit 2</td></tr>
</table>

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Value 1</td><td rowspan="2">Enter your values in these columns. If the factor does not require two values, the Value 2 column is grayed out.

<table>
<tr><th>Value 1</th><th>Unit 2 Type</th><th>Unit 2</th><th>Value 2</th></tr>
<tr><td>100</td><td></td><td></td><td></td></tr>
<tr><td>100</td><td>Time</td><td>hour</td><td>200</td></tr>
<tr><td>100</td><td>Time</td><td>hour</td><td>100</td></tr>
<tr><td>100</td><td>Time</td><td>hour</td><td>100</td></tr>
<tr><td>100</td><td></td><td></td><td></td></tr>
<tr><td>100</td><td></td><td></td><td></td></tr>
<tr><td>100</td><td>Distance</td><td>km</td><td>200</td></tr>
<tr><td>100</td><td></td><td></td><td></td></tr>
<tr><td>100</td><td></td><td></td><td></td></tr>
</table>
</td></tr>
<tr><td>Value 2</td></tr>
<tr><td>Attachment Required</td><td rowspan="2">These column entries list whether an attachment or comment is required. If an attachment is required, you will receive a reminder to upload attachments for all required factors after the import. The profile will not submit unless these required attachments are uploaded to the appropriate factors.</td></tr>
<tr><td>Comment Required</td></tr>
<tr><td>Comment</td><td>If the Comment Required column is set to True, you must enter a comment in this column for a valid import.</td></tr>
</table>

NOTE: If multiple factors are used for a control list, you can create separate rows for different factors.

Utilities Data Import Template

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Site</td><td rowspan="5">These columns are pre-populated. This data cannot be edited or deleted.</td></tr>
<tr><td>Supplier</td></tr>
<tr><td>Category</td></tr>
<tr><td>Region</td></tr>
<tr><td>Unit Type</td></tr>
<tr><td>Unit</td><td>Use the drop-down menu to select a unit.

</td></tr>
<tr><td>Value</td><td>Enter a value in this column.</td></tr>
<tr><td>Comment</td><td>Comments are not required for utilities.</td></tr>
</table>

Import Data

When you complete the template, follow these steps to import factors:

1. Click the **Import** button.
2. In the **File Upload** window, click the **BROWSE** button to open File Explorer.
3. Select the template and click the **Open** button.
4. Click the **Upload** button. All factors will display in the Factors grid.

> **NOTE:** For a valid import, the Excel workbook can only have one tab and all headers must match the input grid fields.

Reports

The Reports page is only accessible to OneStream Administrators and Solution Administrators. See Global Options.

> **IMPORTANT:** For this release of ESG Reporting and Planning, reports can only be produced for the ESRS framework and internal frameworks.

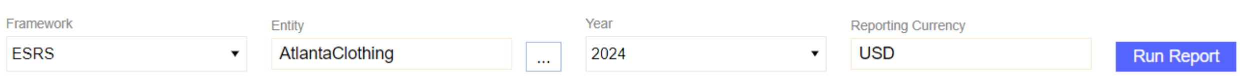
Select the hamburger menu to navigate to the Reports tab.

The report contains narrative type data and data for scopes 1, 2, and 3. The scope emissions reports are organized below the E1-Climate category. The narrative type data follows the framework structure and displays in the report based on framework ID. Only profiles with a Completed status will be included in the report.

Run a Report

> **IMPORTANT:** Only Administrators can run a report.

Select all parameters to run a report.



Parameter	Description
Framework	From the **Framework** drop-down menu, select a framework.

Parameter	Description
Entity	To select an entity for reporting, click the ellipses. In the **Select Member** window, under the **Hierarchy** tab, use the tree navigation to select an entity. Alternatively, use the **Search** tab to search for an entity. Click the **OK** button. **NOTE:** You cannot run a report for multiple entities.
Year	The Year drop-down menu will default to the current workflow year. Use the **Year** drop-down menu to select a different year.
Reporting Currency	This field displays the currency selected on the Global Options page. See Global Options.

When all parameters are selected, click the **Run Report** button.

NOTE: Reports will fail if calculations exceed 10^{38}-1.

Report Structure

The following sections detail the structure used to report narrative and emission data in the report:

- Narrative
- Scope 1
- Scope 2
- Scope 3
- Retrospectives and Targets

Narrative

Narrative type data either displays as narrative text or as a table with value entries.

Narrative Control List Table Display

Control list entries display as tables in the report. For definitions with one control list assigned, the control list title is the column one header, and the column one entries display the control list members. All values entered for the control list members display in column two.

AR 55 - Net revenue

Country	Monetary
Australia	46,800 USD
Canada	29,900 USD
United Kingdom	14,375 USD
United States	10,000 USD
	101,075 USD

If a definition has two control lists assigned to it, the data entered for that definition displays as a table with multiple columns. All control list members display in alphabetical order.

Report Column	Description
Column 1 Header	The name of the first control list assigned.
Column 1 Entries	The members in the first control list.
Column 2 Header	The name of the second control list assigned.
Column 2 Entries	The members in the second control list.
Column 3 Header	The definition unit type.
Column 3 Entries	The values entered for each control list member on the Home page.

If the definition has an aggregable unit type and there are two control list assigned, the subtotal amount for control list one is bold in the corresponding row. The total amount for control list two displays at the end of the table. The following definition unit types do not aggregate on the report: Average, percent, date, and narrative. All other definition unit types display totals on the report.

39 - Total amount of hazardous waste

Waste Type	Chemical	Weight
Food		**2,896.2 kg**
	Dioxins	1,814.4 kg
	PCB	1,081.8 kg
General		**105 kg**
	Lead	100 kg
	PCB	5 kg
Nuclear		**5,000 kg**
	Asbestos	3,000 kg
	Formaldehyde	2,000 kg
	Asbestos	**3,000 kg**
	Lead	**100 kg**
	PCB	**1,086.8 kg**
	Dioxins	**1,814.4 kg**
	Formaldehyde	**2,000 kg**

NOTE: Control List 3 and Control List 4 do not display on the report.

Scope 1

The Scope 1 report section provides a summary table displaying all emission categories and their total CO2e emissions.

Scope 1 Emission by Categories

	CO2e
Refrigerants and Fugitive Gases	104,055.40 t
Fuel	1,900.84 t
Vehicles	0.02 t
Total Scope 1	**105,956.27 t**

The report breaks down the CO2e emissions by category. The table for each category lists the factor name and displays the CO2e emission for each factor with the category CO2e total highlighted. The category types are sorted in the table from highest to lowest based on CO2e. The report also shows the CO2, N2O, and CH4 calculations.

Emission by Fuel Type

Fuel	CO2e	CO2	CH4	N2O
Coal - domestic	1,844.76 t	1,671.43 t	5.45 t	0.08 t
Marine fuel oil	49.32 t	48.68 t	0.00 t	0.00 t
Marine fuel oil (gross CV)	6.55 t	6.47 t	0.00 t	0.00 t
Coal - electricity generation - home produced coal only	0.20 t	0.20 t	0.00 t	0.00 t
Marine gas oil (gross CV)	0.01 t	0.01 t	0.00 t	0.00 t
Gas oil (gross CV)	0.00 t	0.00 t	0.00 t	0.00 t
	1,900.84 t			

Factor Control List Table Display

Control list entries display as tables on the report. The title of the category contains the control list name and each control list member displays as a bold row header. The total CO2e aggregates and displays in the control list member row.

Emission by Car	CO2e
Compass	
Vehicles	0.00 t
Fuel	55.87 t
Corsair	
Fuel	0.01 t
GMC Sierra	
Vehicles	0.02 t

Scope 2

The Scope 2 section reports Market-based and Location-based utility usage. The contracts entered by the Administrator on the Contracts page are used for the market-based utility usage calculation. The Market-based calculation uses the entered value for purchased utility and subtracts the contract value of the utility for the compliance year to provide the CO2e total.

Location-based and Market-based usage displays on two separate summary tables. Each table shows the utility calculation for each category with the total amount bold below the table.

Scope 2

E1-6_09 Gross location-based Scope 2 greenhouse gas emissions

	CO2e
Electricity	1.17 t
Heat and Steam	0.66 t
Total Location-based GHG emissions	**1.83 t**

E1-6_10 Gross market-based Scope 2 greenhouse gas emissions

	CO2e
Electricity	0.66 t
Heat and Steam	0.33 t
Total Market-based GHG emissions	**0.99 t**

Scope 3

The Scope 3 section reports indirect upstream and downstream emissions. The report provides a summary table displaying all upstream and downstream categories with their total CO2e emissions. The scope 3 total emission is bold below the table.

Scope 3 Emission

	CO2e
Upstream Categories	
Purchased Goods and Services	47.07 t
Downstream Categories	
Downstream Transportation and Distribution	0.11 t
Total Scope 3	**47.18 t**

The report breaks down the CO2e emissions by category. The table for each category lists the factor sectors with the factor categories below in each column. The total CO2e column for each is highlighted with the CO2e total bold below the table.

Purchased Goods and Services

Sectors	CO2e
Information and Communication	**1.12 t**
Cloud Computing - CPU	1.12 t
Materials and Manufacturing	**45.91 t**
Metals	45.91 t
Organizational Activities	**0.04 t**
Professional Services	0.04 t
	47.07 t

Retrospectives and Targets

When you are reporting Scope 1-3 data for emissions in the ESRS framework, additional columns for Baseline Year, Prior Year, Milestone Year, and variance calculations will display on the report if those options are selected. The Target columns display based on the Milestone years selected on the Global Options page. If additional milestone years are selected in Global Options, the report will expand to include those target years in the order they are set up in. See Global Options and Manage Definitions.

Each column will display data based on what is entered in the corresponding Workflow Profile. The column displaying data for the current year is highlighted in gray. The N-(N-1) column displays the variance between the Current year (N) and the Prior year (N-1). The % N/(N-1) column displays the percent change between the Current year (N) and the Prior year (N-1).

E1-6 - Gross Scopes 1, 2, 3 and Total GHG emissions

48 a - Gross Scope 1 greenhouse gas emissions (weight in kg)

N = Current Year

Retrospective	Targets		
2027 (N)	2025	2030	2050
957.03	1,002.27	997.73	

The following image displays single control list integration with Retrospective and Target columns. Each control list member is a row in the first column.

49 a, 52 a - Gross location-based Scope 2 greenhouse gas emissions (weight in kg)

N = Current Year, N-1 = Prior Year

	Retrospective					Targets		
	2025	2026	2027 (N)	N-(N-1)	% N/(N-1)	2025	2030	2050
Female	250.00	120.00	165.00	45.00	37.50%	136.05	250.00	
Male		175.00	150.00	-25.00	-14.29%		226.76	
Non-Binary		1,000.00	393.20	-606.80	-60.68%		4,000.00	
Other		4,535.92	3,000.00	-1,535.92	-33.86%		1,814.06	
Total	**250.00**	**5,830.92**	**3,708.20**	**-2,122.72**	**-36.40%**	**136.05**	**6,290.82**	

The following image displays two control lists integrated with Retrospective and Target columns. Each control list member is a row in the first column, and the second control list members are rows in the second column. The subtotal amount for each member in control list one is bold in the corresponding row.

49 b, 52 b - Gross market-based Scope 2 greenhouse gas emissions (weight in kg)

N = Current Year, N-1 = Prior Year

		Retrospective					Targets		
		2025	2026	2027 (N)	N-(N-1)	% N/(N-1)	2025	2030	2050
ProductA		**549.37**	**1,408.16**	**125**	**-1,283.16**	**-91.12%**	**136.05**	**125.00**	
	Vendor1	453.51	1,000.00	25.00	-975.00	-97.50%		24.00	
	Vendor3	95.86	408.16	100.00	-308.16	-75.50%	136.05	101.00	
ProductC		**7,721.55**	**3,040.00**	**2362.81**	**-677.19**	**-22.28%**	**408.16**	**2,427.46**	
	Vendor2	5,000.00	3,000.00	362.81	-2,637.19	-87.91%	408.16	327.46	
	Vendor4	2,721.55	40.00	2,000.00	1,960.00	4,900.00%		2,100.00	
Total		**8,270.92**	**4,448.16**	**2,487.81**	**-1,960.35**	**-44.07%**	**544.21**	**2,552.46**	

Help and Miscellaneous Information

Select the hamburger menu to navigate to the Help page.

This page contains solution documentation.

Display Settings

OneStream Solutionfrequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Package Contents and Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. Renaming any of the elements contained in a package is discouraged in order to preserve the integrity of the naming conventions.

Example Package Name: ESG_PV9.0.0_SV100_PackageContents.zip

Identifier	Description
ESG	Solution ID
PV9.0.0	Minimum Platform release required to run solution
SV100	Solution release
PackageContents	File name

Solution Database Migration Advice

A development OneStream application is the safest method for building out a solution with custom tables such as this one. The relationship between OneStream objects such as workflow profiles and custom solution tables is that they point to the underlying identifier numbers and not the object names as seen in the user interface. Prior to the solution configuration and to ensure the identifiers match within the development and production applications, the development application should be a recent copy of the production application. Once the development application is created, install the solution and begin design. The following process below will help migrate the solution tables properly.

See also: *Managing a OneStream Environment* in the *Design and Reference Guide*.

OneStream SolutionModification Considerations

A few cautions and considerations regarding the modification of OneStream Solutions:

- Major changes to business rules or custom tables within a OneStream Solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the OneStream Solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a OneStream Solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.

Appendix A: Definition Input Types

The following table is a reference for how the solution assigns ESRS data types to system-defined definition input types.

<table>
<tr><th>Definition Input Type</th><th>ESRS Data Type</th></tr>
<tr><td>Area</td><td>Area</td></tr>
<tr><td>Data</td><td>Data</td></tr>
<tr><td>Distance</td><td>This is not an ESRS data type.</td></tr>
<tr><td>Energy</td><td>Energy</td></tr>
<tr><td>Time</td><td>This is not an ESRS data type.</td></tr>
<tr><td rowspan="2">Volume</td><td>Table/Volume</td></tr>
<tr><td>Volume</td></tr>
<tr><td rowspan="4">Weight</td><td>GHG Emissions</td></tr>
<tr><td>Mass</td></tr>
<tr><td>Table/Ghgemissions</td></tr>
<tr><td>Table/Mass</td></tr>
</table>

Definition Input Type	ESRS Data Type
Numerical	Decimal
	Decimal/Percent/Narrative
	Integer
	Intensity
	Table1/Decimal
	Table2/Decimal
	Table3/Decimal
	Table4/Decimal
	Table/Decimal
	Table/Integer
	Table/Numerical
Date	Year
Percent	Integer/Percentage
	Percent
	Table/Percent
	Table/Percentage

Definition Input Type	ESRS Data Type
Narrative	MDR-a
	MDR-p
	MDR-t
	Narrative
	Narrative/Monetary
	Narrative/Numerical
	Semi-narrative
	Table/Semi-narrative
	Table
	Table 1
	Table 2
	Table 3
	Table 4
	Table/Narrative
Monetary	Monetary
	Table/Monetary
Average	This is not an ESRS data type.

Appendix B: Climatiq Data Sources

This table is a list of data sources provided by Climatiq. See Third-Party Integration Technology.

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td>ADEME</td><td>549</td><td>3</td><td>Activity-based</td><td>Multiple regions</td></tr>
<tr><td colspan="5">Description: ADEME (Agence de la transition écologique) is the French Agency for Ecological Transition and offers a wide range of emission factors to support the measurement and reduction of greenhouse gas emissions in France. These emission factors are used to estimate greenhouse gas emissions associated with various activities, such as energy consumption and transportation.</td></tr>
<tr><td>AIB</td><td>836</td><td>1</td><td>Activity-based</td><td>European Countries, United Kingdom</td></tr>
<tr><td colspan="5">Description: The Association of Issuing Bodies (AIB) is a European organization that manages and promotes the use of energy attribute certificates to track the production and consumption of renewable energy in Europe. The AIB produces the European Residual Mix Report which includes data on the mix of fuels used to generate electricity in each European country, as well as the associated greenhouse gas emissions.</td></tr>
</table>

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td>BEIS</td><td>7875</td><td>12</td><td>Activity-based, Spend-based</td><td>Multiple regions, Global</td></tr>
<tr><td colspan="5">Description: The UK Government issues emission conversion factors for use by UK and international organisations to report on greenhouse gas emissions. The key responsible departments / agencies are / were: BEIS, DEFRA, DESNZ and NAEI.</td></tr>
<tr><td>CAEP</td><td>247</td><td>1</td><td>Activity-based</td><td>China</td></tr>
<tr><td colspan="5">Description: The Chinese Academy of Environmental Planning (CAEP) is a public institution that conducts crucial research and offers policy recommendations on environmental issues to the Chinese government and corporations, playing a significant role in developing China's environmental strategies.</td></tr>
<tr><td>CBAM</td><td>7372</td><td>3</td><td>Activity-based</td><td>Multiple regions</td></tr>
<tr><td colspan="5">Description: The European Union's Carbon Border Adjustment Mechanism (CBAM) is a regulatory tool designed to measure carbon emissions attributed to the production of high-carbon goods imported into the EU, aiming to promote cleaner practices in industrial production across non-EU countries. To this end, the European Commission publishes emission factors providing the necessary metrics for compliance and environmental integrity.</td></tr>
</table>

Source	Factors	Datasets	Data Type	Geography
CCF	2513	1	Activity-based	Multiple regions
Description: Cloud Carbon Footprint is a free and open-source emissions measurement and analysis tool. It provides emission factors and methodology for measuring the emissions of Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP).				
Circular Ecology	531	1	Activity-based	Multiple Regions, Global
Description: Circular Ecology offers resource efficiency services, including carbon footprinting, water footprinting, life cycle assessment (LCA), circular economy and general resource efficiency.				
Climate TRACE	494	1	Activity-based	Multiple regions
Description: Climate TRACE (Tracking Real-Time Atmospheric Carbon Emissions) is a collaborative initiative aimed at providing precise, real-time tracking of global greenhouse gas emissions using artificial intelligence, satellite image processing and other remote sensing technologies along with academic research and publicly available data.				
CLP Group	5	1	Activity-based	Hong Kong

Source	Factors	Datasets	Data Type	Geography
Description: The CLP Group is a Hong Kong-based power company that generates electricity from a variety of sources, including coal, gas, nuclear, and renewable energy. The company conducts greenhouse gas emissions accounting and reporting and provides data on its emissions performance.				
CT	87	1	Activity-based	G20
Description: Climate Transparency is a global partnership organisation funded by the German Government, World Bank, and several other bodies. It seeks to stimulate climate action in G20 countries through enhanced transparency. The Climate Transparency Report annually provides the emission intensity of electricity generation for various countries, based on the emissions from the respective grid mix.				
DEWA	1	1	Activity-based	United Arab Emirates
Description: The Dubai Electricity and Water Authority (DEWA) is a government-owned utility company that provides electricity and water services to the emirate of Dubai in the United Arab Emirates. It is responsible for implementing policies and initiatives related to energy and water supply and conservation and promoting the use of renewable energy sources in Dubai.				
DISER	591	2	Activity-based	Australia

Source	Factors	Datasets	Data Type	Geography
Description: The Australian Government issues emission conversion factors for use by Australian and international organisations to report on greenhouse gas emissions. The key responsible departments / agencies are / were: DISER and DCCEEW.				
EEA	1047	1	Activity-based	European Countries
Description: The European Environment Agency (EEA) is an EU agency that provides independent scientific and technical information to support environmental policies and sustainable development in Europe through data analysis, assessment, and reporting.				
EEI	760	1	Activity-based	US
Description: The Edison Electric Institute (EEI) is the association that represents all U.S. investor-owned electric companies. EEI has developed a database to support corporate sustainability reporting, especially in calculating scope 2 emissions for specific US electricity suppliers.				
Electricity info	68	1	Activity-based	United Kingdom
Description: ElectricityInfo.org is an independent website providing consumers with environmental information on the UK electricity supply industry including emission factors of fuel mix electricity data so they can make an informed choice about their electricity supply.				

Source	Factors	Datasets	Data Type	Geography
EMA	2	1	Activity-based	Singapore
Description: The Energy Market Authority (EMA) is a statutory board under the Ministry of Trade and Industry in Singapore. They issue average CO2 emission emitted per unit of electricity.				
EPA	4670	7	Activity-based, spend-based	US
Description: The Environmental Protection Agency (EPA) is the United States government agency that provides regularly updated default emission factors for organisational greenhouse gas reporting in the United States.				
EPPO	1	1	Activity-based	Thailand
Description: The Energy Policy and Planning Office (EPPO) of Thailand issues the average CO2 emission emitted per unit of electricity.				
EXIOBASE	7816	1	Spend-based	Multiple regions

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td colspan="5">Description: EXIOBASE is a global, detailed Multi-Regional Environmentally Extended Supply-Use Table (MR-SUT) and Input-Output Table (MR-IOT). It was developed by harmonising and detailing supply-use tables for a large number of countries, estimating emissions and resource extractions by industry. Subsequently, the country supply-use tables were linked via trade creating an MR-SUT and producing MR-IOTs from this. The MR-IOT can be used for the analysis of the environmental impacts associated with the final consumption of product groups. The EXIOBASE emission factors use basic prices. The basic price represents the initial cost set by a producer for a product or service, without additional fees like taxes or delivery costs (referred to as tax and transport margins). The values in the Climatiq Database might not be exactly the same as the ones you find on the EXIOBASE download page due to the prices used.</td></tr>
<tr><td>GEMIS</td><td>135</td><td>1</td><td>Activity-based</td><td>Germany</td></tr>
<tr><td colspan="5">Description: GEMIS, or the Global Emission Model for Integrated Systems, is a comprehensive life cycle assessment (LCA) software tool developed by IINAS, the Institute for Integrated Environmental Assessments. The tool is designed to analyse and model the environmental impacts of various technologies, products, and services. GEMIS covers a wide range of sectors, including energy, transport, materials, and agriculture, among others, providing reliable and consistent emission factors.</td></tr>
<tr><td>GHG Protocol</td><td>534</td><td>2</td><td>Activity-based</td><td>Multiple regions</td></tr>
</table>

Source	Factors	Datasets	Data Type	Geography
Description: The GHG Protocol is the de-facto standard-setting organisation for greenhouse-gas accounting. As well as producing guidance on estimating and categorising emissions, it also provides a set of the most commonly-used emission factors including energy consumption, transportation, waste management, and industrial processes.				
GLEC	2158	2	Activity-based	Multiple regions, Global
Description: The Global Logistics Emissions Council (GLEC) is a partnership between industry, government, and non-governmental organisations that aims to develop and promote a standardised approach for measuring and reporting greenhouse gas emissions from logistics supply chain activities, including freight transport by road, rail, air, and sea.				
Google	54	1	Activity-based	Multiple regions
Description: Google is a global internet services company. They calculate and publish carbon emissions associated with their operations in their data centres, using hourly grid mix and carbon intensity data from Electricity Maps.				
Government of Canada	770	2	Activity-based	Canada

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td colspan="5">Description: Environment and Climate Change Canada (ECCC) is the department of the Government of Canada responsible for coordinating environmental policies and programs as well as enforcing environmental regulations. Canada's Official Greenhouse Gas Inventory offers comprehensive data and insights on Canada's environmental footprint through greenhouse gas emission records.</td></tr>
<tr><td>Green-e</td><td>81</td><td>3</td><td>Activity-based</td><td>US</td></tr>
<tr><td colspan="5">Description: Green-e is a certification program in the United States focusing on renewable energy and carbon offset products and services, providing greenhouse gas emission factors for energy sources such as electricity.</td></tr>
<tr><td>Greenview</td><td>2159</td><td>1</td><td>Activity-based</td><td>Multiple regions</td></tr>
<tr><td colspan="5">Description: Greenview is a sustainability platform that provides the Hotel Footprinting Tool, utilizing data from over 27,000 hotels in the Cornell Hotel Sustainability Benchmarking index.</td></tr>
<tr><td>HKEI</td><td>3</td><td>1</td><td>Activity-based</td><td>Hong Kong</td></tr>
<tr><td colspan="5">Description: HKEI (Hong Kong Electric Investments) is a Hong Kong-based power company that generates electricity from coal and gas. The company reports the carbon dioxide emissions factor for the electricity it generates and supplies to customers, which is calculated based on the emissions from its power plants.</td></tr>
</table>

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td>IPCC</td><td>30</td><td>1</td><td>Activity-based</td><td>Global</td></tr>
<tr><td colspan="5">Description: The Intergovernmental Panel on Climate Change (IPCC) is a United Nations body that assesses the scientific evidence related to climate change and offers guidance to governments and policymakers on climate-related issues. IPCC provides a range of emission factors in their reports including energy-related emissions, industrial processes, agriculture, and land use and waste management activities.</td></tr>
<tr><td>Market Economics Limited</td><td>424</td><td>2</td><td>Spend-based</td><td>New Zealand</td></tr>
<tr><td colspan="5">Description: Market Economics Limited is an independent New Zealand-based consultancy that specialises in market and economic analysis and environmental and ecological research.</td></tr>
<tr><td>MfE</td><td>1278</td><td>3</td><td>Activity-based</td><td>New Zealand</td></tr>
<tr><td colspan="5">Description: The Ministry for the Environment (MfE) is the government agency responsible for environmental policy and regulation in New Zealand, providing guidance and resources on greenhouse gas (GHG) accounting and reporting including emission factors of different GHG emissions sources.</td></tr>
</table>

Source	Factors	Datasets	Data Type	Geography
Netherlands Enterprise Agency	109	1	Activity-based	Netherlands
Description: The Netherlands Enterprise Agency (RVO) is a government agency, part of the Dutch Ministry of Economic Affairs and Climate Policy. It fosters sustainable business practices by offering crucial resources.				
NVE	11	2	Activity-based	Norway
Description: The Norwegian Water Resources and Energy Directorate (NVE) provides emission factors for greenhouse gas (GHG) accounting, covering physically delivered electricity and supplier-specific disclosures, enabling assessment of Norway's electricity-related emissions.				
OEKOBAUDAT	461	1	Activity-based	Multiple regions
Description: The German Federal Ministry for Housing, Urban Development, and Building provides the OEKOBAUDAT, an extensive database of emission factors for materials and equipment used in construction and building design.				
OpenIO-Canada	5894	1	Spend-based	Multiple regions

Source	Factors	Datasets	Data Type	Geography
Description: OpenIO-Canada is an open-source, Environmentally Extended Input-Output (EEIO) model and tool designed to estimate the life cycle impacts of products and services in Canada.				
SEFR	219	1	Activity-based	Singapore
Description: The Singapore Emission Factors Registry (SEFR) is a collaborative initiative led by the Singapore Business Federation (SBF) in partnership with government agencies and industry stakeholders. It consolidates emission factors across various sectors to assist businesses in accurately calculating their greenhouse gas emissions.				
Shiseido	9	1	Activity-based	Global
Description: Shiseido is a Japanese multinational personal care company that produces a wide range of cosmetic, skincare, and fragrance products. The company conducts greenhouse gas emissions accounting and reporting with data on emissions from manufacturing, logistics, and business travel, among other sources.				
STC-Nestra B.V.	14	1	Activity-based	European routes

<table>
<tr><th>Source</th><th>Factors</th><th>Datasets</th><th>Data Type</th><th>Geography</th></tr>
<tr><td colspan="5">Description: STC-Nestra B.V. is a consulting and engineering firm based in the Netherlands that specializes in sustainable transport solutions. One of the services offered by STC-Nestra B.V. is the calculation and reporting of transport emissions, such as greenhouse gas emissions associated with sea transport.</td></tr>
<tr><td>UBA</td><td>100</td><td>5</td><td>Activity-based</td><td>Germany</td></tr>
<tr><td colspan="5">Description: The Umweltbundesamt (UBA) is the Federal Environment Agency of Germany and is responsible for promoting sustainable development through scientific research, providing advice on a wide range of environmental issues to the government, businesses, organisations, and the public. The UBA reports emission factors for electricity, fuel, and transport among others.</td></tr>
<tr><td>UNECE</td><td>2</td><td>1</td><td>Activity-based</td><td>Global</td></tr>
<tr><td colspan="5">Description: The United Nations Economic Commission for Europe (UNECE) is one of the regional commissions of the United Nations, focused on improving economic relationships between European countries and enhancing cooperation for sustainable development. Among its various publications is the document on Integrated Life-cycle Assessment of Electricity Sources, which provides comprehensive emission factors for different electricity generation methods.</td></tr>
</table>

Source	Factors	Datasets	Data Type	Geography
WRAP	621	1	Activity-based	United Kingdom, Global, Europe, France

Description: WRAP provides a comprehensive database for scope 3 food and drink emission factors, employing a consistent methodology that enables businesses to measure and track their supply chain greenhouse gas (GHG) emissions. To form this comprehensive repository, WRAP synthesizes information from numerous distinct sources including academic publications among others.

Appendix C: Tables and Package Contents

Refer to this page for a complete list of tables and package contents included with the ESG Reporting and Planning solution.

- XFW_ESG_ControlLists
- XFW_ESG_UnitOfMeasureConversions
- XFW_ESG_ClimatiqFactorsVersioning
- XFW_ESG_ClimatiqFactorsAuditReplaced
- XFW_ESG_ClimatiqFactorsAuditRemoved
- XFW_ESG_CustomFactors
- XFW_ESG_Factors
- XFW_ESG_DataQualityFlags
- XFW_ESG_CalcMethods
- XFW_ESG_FactorGroups
- XFW_ESG_FactorGroupsMapper
- XFW_ESG_FactorGroupsFactorLCAActivities
- XFW_ESG_FactorGroupsFactorSources
- XFW_ESG_SiteFactorGroupMapper
- XFW_ESG_Tasks

- XFW_ESG_TaskSitesMapper
- XFW_ESG_TaskReportingDetail
- XFW_ESG_TaskFrameworkKPIMapper
- XFW_ESG_ProfileFormDataEntry
- XFW_ESG_DataEntry
- XFW_ESG_ElectricityContractUsage
- XFW_ESG_DefinitionsDataEntry
- XFW_ESG_DataEntryInputs
- XFW_ESG_DataEntryComments
- XFW_ESG_DataEntryAttachments
- XFW_ESG_Frameworks
- XFW_ESG_FrameworkKPIs
- XFW_ESG_AccessGroup
- XFW_ESG_DefinitionControlLists
- XFW_ESG_DefinitionControlListsMembers
- XFW_ESG_AccessGroupMember
- XFW_ESG_Sites
- XFW_ESG_DefinitionCategories
- XFW_ESG_DefinitionUnitTypes
- XFW_ESG_Definitions
- XFW_ESG_DefinitionsFrameworkMapper

- XFW_ESG_DefinitionsControlListMapper
- XFW_ESG_Profiles
- XFW_ESG_ProfilesSiteMapper
- XFW_ESG_ProfilesDefinitionMapper
- XFW_ESG_Scope
- XFW_ESG_Contract
- XFW_ESG_DataEntryControlListValue
- XFW_ESG_DefinitionDataEntryControlListValue
- XFW_ESG_DefinitionsCubeProperties

Views:

- vw_XFW_ESG_CategoryTableEditor
- vw_XFW_ESG_ExternalFactorsWithGroups
- vw_XFW_ESG_IntenalFactorsWithGroups
- vw_XFW_ESG_FactorsGrouping

Appendix D: Dynamic Cube POV

Data from ESG Reporting and Planning is loaded into dynamic cubes using a combination of standard dimensions and dynamic dimensions. Review the following information to help you navigate Cube Views based on the ESG dynamic cube.

Entity	ESG Reporting and Planning data is loaded into dynamic cubes based on the profile's Dynamic Cube Reporting Entity. See Manage Profiles.
Consolidation	ESG Reporting and Planning data is loaded into the Local member.
Scenario	ESG Reporting and Planning data is associated with a scenario on data entry.
Time	ESG Reporting and Planning data is associated with the time period it was entered in, for example, 2025M1.
View	Numeric data is loaded into the Periodic member. Narrative data is displayed in the Annotation member as plain text and the VarianceExplanation member as rich text.
Account (Dynamic)	The Account dimension is dynamically created and includes all ESG Reporting and Planning framework KPIs. Each data entry in ESG Reporting and Planning is associated with a definition/KPI.
Flow	ESG Reporting and Planning data is loaded into the None member by default.

Origin	ESG Reporting and Planning data is loaded into the Import member.
IC	ESG Reporting and Planning data is loaded into the None member by default.
UD 1-UD 8	UD dimensions are used for the dynamically created control list and unit of measure dimensions. **TIP:** For numeric entries, use TotalControlList and Total UOMs for a simple way to locate data.For narrative entries, Control Lists should be set to the control list answer selected on data entry, and UOM should be set to none.

Third-Party Component Technology

ESG Reporting and Planning is created using third-party data feeds as in ingestion of factors and frameworks provided by ESGeo and Climatiq. Copyright notices are available here:

- Copyright: Information incoming from ESGeo
- Copyright: Information incoming from Climatiq. See Climatiq Data Sources.

For a comprehensive list of all third-party component tools throughout the OneStream application, see the *Third-Party Component Guide*.