# Using ESG

## ESG Program Overview

This content is intended as a guide for the ESG program in its current state. Five common scenarios have been identified and a video and talk track provided for each. This content will be improved and iterated upon moving forward as product makes changes to the program.

### Scenarios

- General Navigation
- Perspective of a Data Provider/Approver
- Adding, Updating, and Removing Metrics in the Program
- Refreshing Data in the Factbook

### General Navigation

To help ease data collection for ESG reporting, we can create an ESG Program.

The Program acts as a central hub, where you can manage files related to your data collection and reporting process, topics that are material to your reporting,  the data – or metrics – collected for each topic, and the frameworks your data aligns to

Additionally, you can manage data providers and approvers, including due dates and status tracking, at the overall topic and individual metric level.

In the program information section, we can assign a unique name to the program, enter the reporting year that the program applies to, and add any files in the workspace that are related to the Program and its topics.

We can also click the Permissions' icon to grant or restrict access to the program to individuals or groups.

The Program outline is maintained in the left-hand panel, where you can organize and categorize your metrics by section and topic.

Sections categorize topics by general themes, such as Environmental, Social, or Governance. You can further categorize topics using up to five nested sections, such as Climate, Greenhouse Gas, and Indirect GHG Emissions.

Topics indicate the specific ESG factors that the program addresses. Each topic contains metrics to track the data disclosed. Topics will appear in the ESG program with a status indicator. This is because when you add a topic is added to a Program, it automatically adds a process to track the data collection of its metrics values.

You can customize your program outline using the left-hand panel. If you are starting from scratch, simply click into this create icon, and select “Section” to create your first section. Right-click on the section that you have just created, and select “Rename” to name your section.

From there, you can add additional sections or add topics using the same icon.

To apply icons to items in the program outline, right-click the section or topic, and select Edit.

To organize and arrange your sections and topics after they have been created, simply drag-and-drop within the left hand panel.

Once the topic has been added to the ESG Program you can add metrics. To help determine the metrics required to disclose a topic you can use our ESG Explorer for guidance from common frameworks and standards for ESG reporting.

Within each metric you can collect quantitative and qualitative values, reference ESG frameworks and standards and send requests to gather values and track its data collection.

Each metric will have a description and a value type.You can enter a value directly into a metric or you can connect it to a source file.

Framework references can be tied directly to the metric from the ESG Explorer and any custom program tags can be applied using this drop-down field.

Program tags are managed in the program by selecting this tag icon in the upper right corner. Anyone who is a workspace owner can add or edit new or existing tags under request details.

You can manage how your data is obtained if needed. You can appoint an assignee and approver through a task with instructions and specific due dates.

When you start a process, the individual assigned gets an email with a hyperlink to where the data needs to be populated. Tasks will also appear on the home screen under tasks.

The status of each metric is tracked individually and also rolled up at the topic level within the program.

These icons, to the left of each metric name indicate how that value is collected. The three types of icons will indicate whether that value is manually entered within the program, whether it is connected to a source file, or whether it has a data provider requested.

These red icons indicate that there is something missing in the setup of this metric.

You can hover over that icon to get feedback on what is missing, and if you click in those fields will be highlighted in red.

## Adding and Managing Metrics within the ESG Program

For each topic In the programs outline, you can add metrics to create a new metric. You can choose “add metric” in the top right. You are also able to duplicate an existing metric. This will maintain any framework references, custom tags or requests. Once you have added a new metric, you can double-click that metric name to edit it.

You can provide additional context about that metric under the description and assign the value type of the data that you're collecting from this drop-down.

You can choose number, currency, text or date. What you choose here will drive whether or not you have to choose a unit or currency. If you choose something like text, you will see that field disappears altogether.

To enter a value in a metric, you are able to directly enter it within the program in this value field. Alternatively you can connect this metric directly to a source file to do so from this dropdown you can select any file that is within your workspace.

Let's go with our data collection example. And then in this field indicate the section of that file you wish to connect to. You will see now we have this blue icon with this option to go to source. If I select this, this will open that file and section that I had just indicated if I choose the cell that I want to connect to. I can right-click and select connect to program metric from my recent dropdowns. I'll see this metric. I was just editing, I'll select that and click apply now.

If I return to my metric, you'll see that we have this metric connected directly to that input cell. You can also do this within other file types. For example, in a document you could select the content that you want to connect right click and again you'll have that option to connect to a program metric.

You can add framework references to connect a metric to the disclosure that it aligns with. To add a framework reference within the program, in the framework references field, choose the add icon. You will see a window showing any disclosures that you have bookmarked or recently selected within the ESG Explorer.

You can open the ESG Explorer through the button on the bottom left and search through the supported frameworks.

Once I have chosen a disclosure that I want the metric to align with, I can choose select and once I have gone through and selected all of the disclosures I want to align to this metric. I can select accept and then save.You can also leverage custom tags to apply to your metrics to track things like company or location.

Custom tags can only be created and managed by workspace owners and are available to all programs within that workspace program tags are managed from the SDI program using this tag icon in the upper right-clicking this icon will now be able to add a new tag giving it a name and any values that I would like.I'm also able to edit any existing tags or archive them again. Only workspace owners are able to create tags or edit existing ones.

Looking back at our metrics and back at the new metric that we have created. If your metric is connected to a source file, you can delegate the collection of its value to members within your workspace. By choosing add request we will now be able to fill out request details.

Process and task names will automatically be generated and I can now select an assignee and due date for this data provider role.

If you want to delegate an approver again, you can select a workspace member within this field and give a due date in instructions. Enter any guidance to help the assigning an approver complete the task. When you start a process, it will send tasks to the assign ease and approvers with a link to the source file section. They're responsible for it as well as any instructions provided.

Looking back at this topic view, we can see that there are icons to the left of each metric name indicating how this value is collected hovering over these will give me more information.

This first one indicates that this is a manually entered value. In other words, this value is entered directly within the metric itself.

This next one is a connected file. This means that that value in the metric is connected to a source file.

This last one indicates a requested value. This means that this metric is connected to a source file and has the request details filled out for that data collection.

If there is any error in populating any of these fields within the metric, the icon will be highlighted in red.

You can hover over that icon to see the fields that are missing and clicking into that metric.I can see the missing fields highlighted in red here as well.

## Data Collection in the ESG Program

To help track data collection, each topic within the ESG program creates a process. When a process has started, a task will be created for any metric.

Within this topic view you can see the status of each metric and in the right-hand panel, the visual of the overall status of that process.

Once that process has started, if you have been assigned as a data provider, you will receive an email notification describing the task that needs to be completed including a hyperlink to the file where you need to accomplish that task.

You can navigate to that file via the link in the email or from your home screen under the task ribbon to see any tasks that have been assigned to you under your dashboard. You can also add a widget to show all of your assigned tasks.

I can navigate to that task again either through the link in our email or by selecting this icon under that task panel. This will bring me to the file and section where I am expected to input a value once I have entered the value as instructed in my task. From my right-hand panel I can open up tasks, ensure that I am looking at the correct task I'm trying to complete and select complete at that point.This task will be marked as completed and that status will be updated at that metric level within the program.

If I have been assigned as a data provider for a metric for which there is an approver when I navigate to my task, I will do the same, make sure I'm looking at that right task.

See any instructions provide my value and then choose submit.

This will kick off a workflow that will send an email to that data approver notifying them that this metric is ready for review.

The data approver will be able to navigate to review this task either through a link via email or again through the home screen where you can see any task assigned to you.

Once I have reviewed this metric as an approver, I can choose to select, approve and complete this task or return this to the data provider.

I'll go ahead and select a proof and this task is now marked as complete again. This will be updated in the individual metric level within that topic.

You can see here these two tasks have now been completed and my status has been updated as an approver. I can also choose to remind for specific statuses of those metrics.

## Refreshing ESG Program Metrics in the Factbook

All metrics collected in the ESG Program can be queried in WData and connected to your factbook.

Once you have added metrics within a topic to keep the data and the fact book up to date, navigate to your factbook and open connections in your right-hand panel. Here you'll be able to see all incoming and outgoing connections to your spreadsheet.

You can refresh all connections by choosing the refresh icon at the top of the panel or within each tile there is an icon to refresh them individually.

We will be refreshing this connection to this data output sheet as this is connected to a query pulling in all metric information from the program.

Once we select this icon we'll get a status of the refresh of that connection we will be able to see any new metrics that we have added to the program be pulled into this sheet. Once it is complete we'll get a green check mark indicating that refresh has completed.

Now that we have the most up to date data within our spreadsheet we can use formula references to pull this value elsewhere within the factbook and link it out to a document.

We'll want to drive those formula references off of this metric ID. This metric ID can be found within the program itself to the right of each metric name in the ellipsis.

You can see the metric ID that's associated with that specific metric. Clicking on it will bring that to my clipboard. If I navigate now back to my fact book and to the section I want to pull that specific metric value, I can either use data validations to drive a dropdown list of those available metrics, or I can paste the value that I've just copied from within my program.

When I copy, I just want to ensure I do not have applied data validation selected this way we still have that drop-down available.