# SERAM Quick Reference Guide Sustainable Enterprise Reporting And Management by Sirius Technologies AG



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## **Versions**

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# Accessing SERAM (SaaS version)

SERAM is a web-based tool that you can access via browser on your computer or handheld device.

In order to access the tool for the first time users must register with SERAM.

# To register for a SERAM account

- Go to https://openid.seram.ch/account/register in your web browser.
- Enter your e-mail address (all lowercase), name, password (with confirmation), and solve the CAPTCHA.
- Click "Send Confirmation Email".
- Wait for the confirmation mail to arrive. If the mail doesn't arrive within minutes, please check your SPAM filter as well.
- Click on the confirmation link in the email.
- You may close the account page after the confirmation is complete.



**Note:** If you had a SERAM version 1 user account, your email address will be used to link you to your existing user account. It is therefore essential to use the identical email address as the one associated to your account in SERAM v1, or you will be unable to access your SERAM v2 data without support of your SERAM administrator.

If there is a problem with the account registration or association, or if you want to associate your existing Google, Yahoo or other OpenID account with SERAM, then please contect the Sirius Service Desk at *servicedesk@sirius.ch*.

# Logging into SERAM v2

- Go to https://login.seram.ch/
- Choose "Log On with Username and Password" (button in the top section)
- Enter the credentials (e-mail address and chosen password)

# Manage SERAM OpenID account, change password

- Go to https://openid.seram.ch/
- Log in to gain access to your account profile



**Note:** If you lost your password and you're using a SERAM OpenID account, you can request a password reset link which will be sent to your registered email address.

# **Technical requirements for using SERAM**

SERAM is a browser-based web application which uses the latest HTML5 technologies. Even though compatibility with older browsers has been added, SERAM has some minimal requirements that need to be fulfilled in order to run properly.

- JavaScript and cookies must be enabled and allowed in the browser
- Network access to \*.seram.ch or \*.seram.app via HTTPS must be allowed

Any modern HTML5 browser should work fine with SERAM, even if they are not listed in the following browser compatibility list:

## **Google Chrome**

Current versions of Google Chrome, including Chrome for Android.



**Tip:** This is our preferred browser, since our tests have shown that the overall performance and feature set is currently the best for running SERAM.

## **Firefox**

Current versions of Firefox.

## Edge

Current versions of Edge.

#### **Brave**

Current versions of Brave.

# **Internet Explorer**

IE 11 is fully supported. Older versions of IE are not longer supported.

## Safari

Current versions of Safari.



**Tip:** This includes the iOS versions, such as on iPhone and iPad.

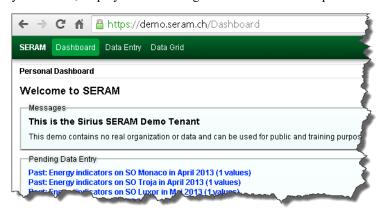
## **Others**

Untested/unsupported, but users have reported successful usage of SERAM with various browsers.

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# **SERAM User Interface**

Directly after logging on to the SERAM web application, you will arrive at your *Dashboard*. Depending upon which permissions have been granted to you by your system administrator, you will have various modules which you can use, displayed within the green menu bar at the top of the screen.



The example above shows a typical homepage for a SERAM user who has *Data Entry* permissions and access to the *Data Grid*.

Updates and information from the administrator are displayed in the Messages box.

Displayed on the right hand side of the screen are the user actions. The user name is displayed along with the option to *Log Out*.



Throughout the SERAM application, user actions are presented on the right hand side of the screen, in this example you can see the user *View Access Control Entries* under the *Permissions* box.

# **Pending Data Entry**

The SERAM Dashboard automatically searches your indicators for data entry which is either Past or Current.

# Past

The *Data Status* is still *Open* for indicators that are required from a previous time point, i.e. a week, month, quarter or year sometime in the past.

## Current

Data is required for the current time period and the data status is still *Open*. Once the latest time period for an indicator has passed it will be shown as *Past*.

The number of values still *Open* are displayed in brackets for each structure and indicator category (tag) that is displayed. To gain fast access to enter these values, you can click the entry. It is a link directing you to the *Data Entry Form* view where you can enter values and set the *Data Status* to *Entered* when complete.

# **Permissions**

Clicking on the View Access Control Entries for myself will display your permissions.



This example shows a user with "Access" rights to "Regions" and "Data Recorder" rights to "Hotels".



**Note:** If you feel that you have incorrect access rights or wish to change your personal settings then you should contact your administrator.

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# Data Entry

The *Data Entry* module allows users to submit data of locations for a specific time period. The information reported within this module requires users to select their various reporting criteria and then enter their performance data. Based upon your SERAM permissions, the Data Entry module of SERAM may automatically make selections for you if they are unique.

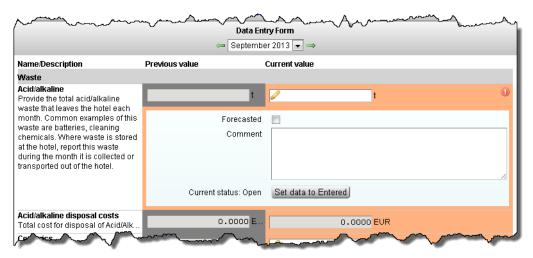
# **Data Entry Form**

Based upon the information provided in the *Data Entry Wizard*, the *Data Entry Form* enables users to enter their data for the indicators selected.

One indicator and its value is selected and displayed in an expanded form, allowing you to see and edit all facets of the indicator value. In the following screen shot, the first value is selected and expanded. When you select another indicator, the previous selection will be collapsed and the new selection will expand.



**Note:** The system constantly saves the information you have entered in the *Data Entry Form*, so there is no need to click a save button.



# **Current Value**

Users are asked to provide their indicator values in this field. The unit of reporting should always be the local unit, e.g. currency, volume, mass. The pencil icon informs the user that they are able to type values.



**Note:** The value will have a red background when it has been entered but fails the constraint checks of the indicator. It will remain red until the problem has been resolved.

# **Previous value**

To provide a quick data quality reference, the previous value is displayed. Simply reviewing the current value and the previous value can often help to remove obvious errors.

## Constraint and plausibility checks

A red exclamation mark • or a colored flag • to the right of the current value informs the user that the value does not meet the data quality checks performed by SERAM on this indicator. The user will not be able to change the data status until this issue has been addressed. In the case of the flag symbol, which indicates an unmet plausibility rule, a comment providing the reason for the non-conformance can be

given to enable the status change. By clicking on the symbol, a short explanation of the problem will be displayed.

#### **Forecasted**

Values that are entered but may need to be changed in future are called Forecasted. For example Forecasting is used for values that are estimated and need to be updated once the real values have been obtained at a later date.

#### Comment

Users should provide any additional information that relates to the value given, e.g. sources, descriptions, further details etc. It is mandatory to provide a comment for values that fail their plausibility checks (flag symbol).

#### Current status, Data Status buttons

Once data has been successfully entered and the user is confident that the value is correct, it is necessary to set the *Data Status* to *Entered*. Clicking the *Set data to Entered* button will change the *Data Status* to entered, if there are no constraint violations. Once an indicator has been set to *Entered*, users will no longer be able edit value or other information. If you set the status to *Entered* by mistake or notice that the value was not correct after all, contact the person in charge of verifying this data or the system administrator. They will reset the status to *Open* for you.

The color coding of the indicator values provides a quick overview of their current data status'. In the default configuration, the colors are the following:

#### Orange

The value is *Open* and may be edited.

#### Yellow

The value has been set to *Entered*, and it is now ready for verification. Editing the value is no longer possible from here on, unless it is re-set to *Open* by the verifier or system administrator.

#### Green

The verifier has accepted the value and set it to the *Verified* status.

# Further actions when entering data

While working in the Data Entry Form, some actions are available to you on the right hand side:



View information relative to the currently selected indicator and its value, e.g. the change history.



Perform the clicked operation for all values shown in the *Data Entry Form* where the operation is applicable. For instance, to mark all *Open* values displayed in the *Data Entry Form* as being forecasted, click the *Set Forecasted* action.



**Note:** What actions are available depends on several factors such as the value, the data status and your permissions.



Toggle the number of displayed decimal places between 2 and 4. This does not affect the storage or entry of values.

Once you have finished entering your indicator data you may return to the wizard at any step to continue entering other data, you may move to another module in the menu bar or you may close the application, either by logging out or closing the browser.



# Data Grid / Data Analysis

The Data Grid module is used for analysis and presentation of data. Additionally data may also be entered in the Data Grid and batch operations can be carried out, e.g. changing data statuses in large blocks.

The system provides a simple step-by-step process for selecting the data to be loaded into the grid. Your system administrator may also have prepared selections for you, and you can save your own selections for quick access to frequently used selections.

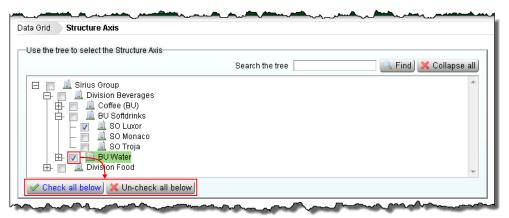


When making a manual selection or completing a partial saved selection, you may select the dimensions of analysis in any order you choose by clicking the boxes or by using the actions on the right hand side.

# **Structures Axis**

Here you select the organizations, locations, regions etc. that you wish to analyze. These are called Structures.

The structures available to you are based upon your access permissions, i.e. if you only have permission for a part of the organization, you will only be able to analyze data for it. If you have access to higher structures in the tree, you have the ability to select entire branches. By selecting the highest level structure you may check or uncheck its descendants by clicking Check all below or Un-check all below, respectively:



If you have entered all three axes you may load the data into the Data Grid by clicking the Done button.

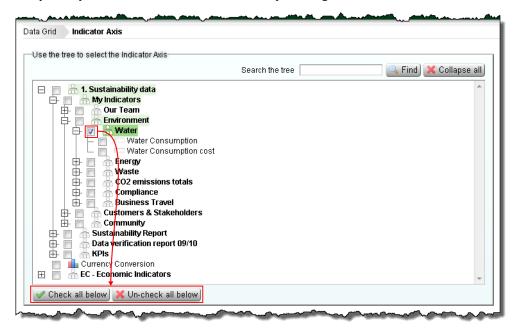


**Tip:** If you have a large and/or expanded structure, these buttons may have moved out of sight and you will need to scroll down to find them.

# **Indicators Axis**

Here you select the indicators that you wish to analyze. Their configuration varies for each SERAM configuration and it may also change for different reporting periods.

The indicators available to you are based upon your access permissions. By selecting an indicator higher up in the tree you may check or uncheck its descendants by clicking *Check all below* or *Un-check all below*, respectively:



You may select multiple indicators by checking them.



**Note:** Some indicators may appear at multiple places in the tree. If you check one of these indicators, SERAM will expand all branches where this specific indicator is used. Unless you check multiple parents of the checked indicator as well, it will only appear once in the loaded grid. Checking or unchecking such an indicator, however, always affects all instances in the tree.

Once you have selected the indicators you move onto the next selection step by clicking either: ☐ Structure Axis or ☐ → Time Axis

If you have entered all three axes you may load the data into the Data Grid by clicking the Done button.



**Tip:** If you have a large and/or expanded indicator tree, these buttons may have moved out of sight and you will need to scroll down to find them.

# Time Axis

You may view data on a weekly, monthly, quarterly or yearly basis - or a mixture of all of them.



**Note:** The availability of the different time-frames depends on the reporting period setup, so that you may not have all choices listed above.

You may check or uncheck entire periods and their descendants may check or uncheck its descendants by clicking *Check all below* or *Un-check all below*, respectively:

You may make multiple time selections by checking them. Once you have selected the time-frames you move onto the next selection step by clicking either: Indicator Axis or Structure Axis.

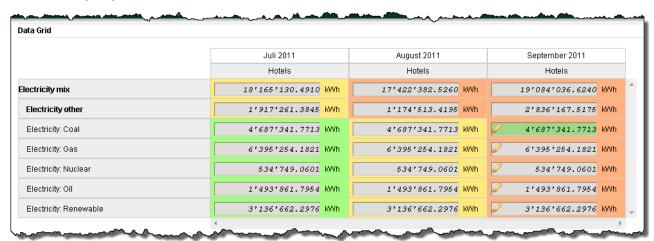
If you have entered all three axes you may load the data into the Data Grid by clicking the Done button.



**Tip:** If you have a large and/or expanded time tree, these buttons may have moved out of sight and you will need to scroll down to find them.

# The Data Analysis Grid

SERAM uses a grid structure to display and analyze data across multiple axes. The system automatically displays the results in the structure it believes is most useful, however users can change the way the data is presented in whichever way they feel is most relevant.



Values are displayed in the corporate reporting unit, which can be different from the input unit by individual structures. For example, in the above screen-shot, the reporting unit for electricity from oil is kWh, but through country-specific conversion factors the data may actually have been entered using cubic meters as input unit.

The same color coding scheme is used in the Data Grid as when using the Data Entry Form.

Additionally, a pen of symbol in the value is a visual indicator that this value can be edited.

# The Grid Axes

The three selected dimensions, i.e. structures, indicators and time periods, are used as axes for the grid. One axis is displayed vertically and two axes are displayed horizontally; the items of the lower horizontal axis is repeated for each item of the upper horizontal axis.

In the above screen-shot, the 7 selected indicators occupy the vertical axis, the 3 selected time periods occupy the upper horizontal axis, and the single selected structure occupies the lower horizontal axis, repeated for each time period.

# **Changing Grid Axes**

If you wish to change the setup or content of the grid, you may do so through the Axes box on the right hand side:



## Change structure axis

Allows you to reselect the structures you wish to be displayed.

## Change indicator axis

Allows you to *reselect the indicators* you wish to be displayed.

# Change time axis

Allows you to *reselect the time periods* you wish to be displayed.

## Change method axis

Allows you to reselect the methods you wish to be displayed.

## **Axes configuration**

If you wish to change the way in which your data is displayed you can change the Axes configuration:



Whenever you want to make a new selection, click the *Clear selected axes* action on the right-hand side of this screen. This will make all radio-buttons available for selection.

You may select the axis representation of the *Structures*, *Indicators* and *Time Indexes* dimensions by clicking the corresponding radio buttons in the axis groups. Note that each dimension can only be selected once, so that the available dimensions are reduced after making a selection. In the above screen-shot, the *Indicators* have been assigned to the vertical axis, therefore the *Indicators* dimension cannot be used in the horizontal axes.

Once your selection is made, click veselected axes. You will then be returned to the grid, which will now use the new axes setup. If the configuration you selected is not what you wanted, you can return to the *Axes configuration* and make different choices, or use veselection to return to the automatic axes selection.



**Note:** SERAM will keep your manual axes configuration for future use of the *Data Grid*. Therefore, if the arrangement of the axes seems odd after loading a new set of data, you may have to go to the Axes configuration and re-enable the automatic selection for axes.

# **Details of Data Grid values**

After selecting a single indicator value, the user may view further details of that indicator or value using the actions in the *Selected Indicator* category on the right-hand side of the screen.

#### Indicator details

To view details about a selected value in the Data Grid, you can click the *View more details* action to get details about the indicator of this value. The exact information displayed depends on the type of the indicator.

## Drill-down into indicator value

The drill-down opens a new view with a list of directly contributing indicator values, including a chart visually displaying the breakdown.



**Note:** This is only available for values which are computed or consolidated in any way, and not for values entered as these cannot be broken down.

For instance, drilling into a calculation will return all the distinct values used in the calculation. Drilling into a structure-consolidated value (even cross-type) will return all values of the contributing structure level. Time-consolidated values will return the time indices used, e.g. a yearly value in a fiscal year will return quarterly values.

Any value in the drill-down list can be drilled down further down to the input value(s).

#### View or edit value

By clicking the *View/Edit the value for this indicator* action a new view opens up showing a *Data Entry Form* view of the selected value. If the value is editable, you can also modify its value here.



**Tip:** Double-clicking a value in the grid invokes this action as well.

# View history of value changes

The changes made to values are recorded by SERAM. You can inspect this value history log by clicking the *View history for* ... action.



**Note:** This is only available for values entered, and not for computed or consolidated values, which often make up the majority of values displayed in the grid.

# **Batch operations on Data Grid values**

You can select value ranges in the *Data Grid* by clicking on the row and column headers. After making such a selection, batch operations can be performed on all selected values to which the operation is applicable, using the actions in the *Batch Operations* category on the right hand side.

Depending on the values and their status, the following actions can be executed:

#### **X** Clear selection

De-select the values. This does not modify any data.

## Set data to ...

Change the status of the values to a new status. The status will only be changed according to your permissions and the general rules for status changes.

## Set or remove forecasted

Change the forecasted flag for all values.

## Fill empty values with 0

This option allows the user to replace any blank value with a zero. Many companies require that locations positively report zero values (i.e. don't leave blanks) and this function allows for quickly filling in zeroes where no value has to be supplied.

#### **Edit values**

Open a *Data Entry Form* view, allowing you to edit a series of values at once using the familiar interface.

#### View values as chart

Display the selection of data as chart.



**Note:** If a batch operation fails, the operation will not make any changes and the whole batch will be discarded. However, you are presented with the option to re-try the operation and skip errors. This option will perform the batch operation and silently ignore any errors, basically performing a best-effort run on the batch operation.

# Reference Environment



Note: This function is advised for advanced users who have undergone specific training.

By default, the data analysis grid uses the most commonly used defaults for the reference environment, e.g. that you wish to view data based on the standard company organization structure of the current time. SERAM however also allows for alternative structures to be analyzed, where they are in place in the company. For example, in addition to the typical company hierarchy structure, the tool may also collect data along geographical, legal or business type lines. Furthermore the tool allows for analysis of data in a historical mode i.e. reviewing performance of the company's structure at a past time point e.g. before acquisitions or mergers. By clicking the *Change reference environment* button, the user may change the standard settings of the data grid to a more advanced and alternative view.

Examples which require changing the reference environment:

- Compute organizational indicator data by countries.
- Manage country-specific emission factors or currency-specific exchange rates.
- Deal with indicators defined and used only by specific structures.
- Look up data of structures which have been deleted in the mean time.

# **Exporting and importing data**

## **Exporting the grid to Excel**

SERAM uses Microsoft Excel as the default output tool for reporting. The tool will create an excel file for the user based upon the selection of the data grid. Therefore you have to finalize your grid selections before you can export the data to Excel. By using the *Export Data Grid to Excel* action on the right-hand side, SERAM will generate an excel-based replica of the Data Grid, and offer it as download in the browser.

# **Using XML files**

SERAM allows for data to be imported from external sources. As standard, you will be able to import the data stored in XML files previously generated by SERAM and populated with data by a 3rd-party application. It is imperative that the .xml files being imported are in the same format as exported by SERAM – the import does not support arbitrary .xml files. If you wish to import files of a different format or if you have any problems uploading .xml files, please contact your administrator.

As a first step, you need to generate the XML file to be populated. This is done by using the *Export as XML* action. You will be prompted for the file format to generate:

## Web XML (legacy SeramLite format)

Choose this format only if you're generating files to be used in SERAM lite, or a compatible tool.

## Flat XML (for databases)

Choose this format for generating files to be used with external databases. The XML contained uses a flat, table-like structure and contains a schema definition of the file. Also, the name of the file (also used for naming the data root element) has to be set prior to the export. The files generated are suitable for XML enabled databases such as Microsoft Access.

After populating the data in the file by the 3rd party tool, the file has to be imported into SERAM. This is done by using the *Import XML* action, which allows you to pick and upload the file.

The import process is subject to the same checks and rules as manually entered data. Therefore errors may occur even for correctly formatted files, such as when value is no longer *Open* or editable and may therefore not be modified. By default, whenever an error occurs, SERAM will abort the whole import and discard any changes, so that the data remains consistent (all or nothing). If you wish to perform a best-effort import, skipping over any erroneous values, you can tick the *Continue if error occurs* check-box. With this check-box ticked, the import will always succeed, but it may be ignoring some or even all values which failed to import.

After importing data, SERAM offers the choice to load the *Data Grid* with the data that has just been imported. This allows you to verify the data and also to change the status to *Entered*, which cannot be done through the data import itself.