SBP

Sustainable Biomass Program

Data Transfer System

Version 1.0

User Guide

August 2017

Document history

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Contents

1 Background

The DTS is an important tool which is necessary to support the integrity of the SBP certification system. It does that through facilitating the collection, collation and transmission of the data required by those generators using biomass to produce energy. Importantly, the DTS allows SBP claims (e.g. SBP-compliant, SBP-controlled) to be transmitted along the supply chain.

Use of the DTS v0.5 has been mandatory for all SBP Certificate Holders from 1 October 2016 and it can be accessed here.

DTS v1.0 is available for all SBP Certificate Holders and Certification Bodies from 1 July 2017, but does not become mandatory until 1 September 2017, which is when the full transition from v0.5 to v1.0 takes place. From 1 September 2017, DTS v0.5 will no longer be available. Until 31 August 2017, DTS v0.5 shall be used for recording transactions of SBP-certified biomass.

Companies may use DTS v1.0 during July and August 2017 for testing and system configuration purposes, including connecting with suppliers and customers, thereby facilitating a smooth transition from 1 September.

2 Getting Started with the DTS

2.1 Accessing DTS v1.0

All SBP Certificate Holders (CHs) and SBP-approved Certification Bodies (CBs) will receive an email invitation to join DTS v1.0 on 1 July 2017 or after issuance of the SBP certificate, whichever is the later. SBP has created user accounts for all SBP-certified companies and SBP-approved Certification Bodies, which means users simply have to log into the portal with their username and password; registration is not required.

The email invitation will be sent to the CH or CB primary contact person, if not defined otherwise.

GLOBAL TRACEABILITY

Hello *[Contact name]*! Welcome to RADIX Tree®!

Your account for RADIX Tree® has been created, you can login now.
RADIX Tree® is the global platform for timber and timber based products.

Below are your access details and a link to the system.

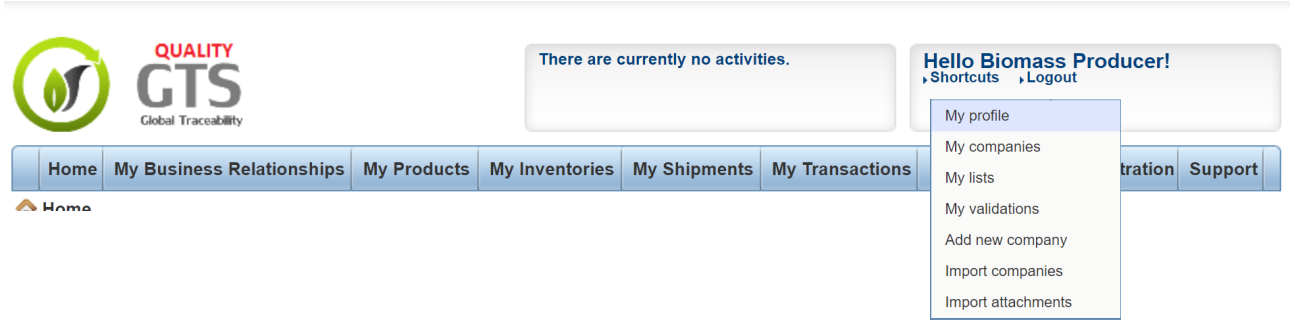
First Name:	*[Your first name]*
Last Name:	*[Your last name]*
Username:	*[Your username]*
Password:	*[Your initial password]*
System Link:	https://radix-tree.org

If the link above does not work, please copy and paste the URL into a new browser window instead.

Login link for DTS v1.0: https://radix-tree.org

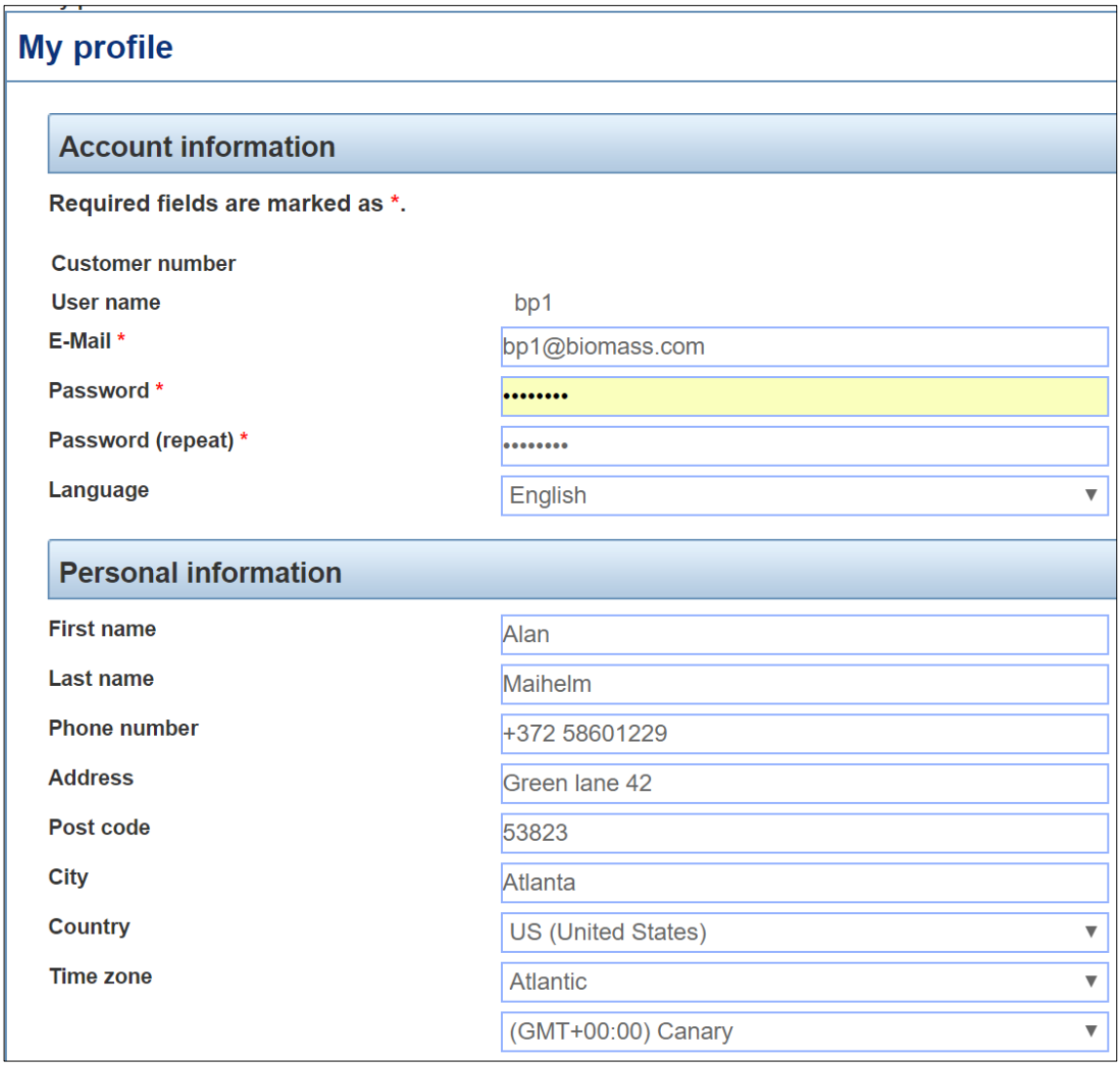
2.2 Updating your contact and company info

After successful first login, we recommend to review your company's contact information. This can be done by clicking on **My Account → My Profile.**



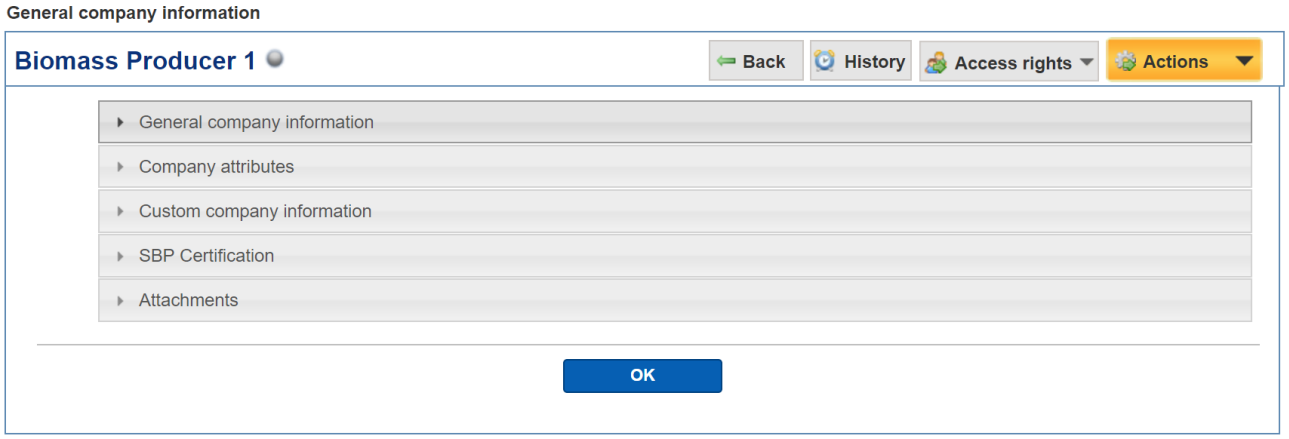
In **My Profile** view, the primary DTS contact person user details can be reviewed and edited. Here you can also change your DTS system password, enter address and set time zone.

Note: E-mail address entered in here will be used to send system notifications (invitations to connect with suppliers and customers; new transaction notification; etc). If your organisation uses a general email address for all SBP-related emails, we suggest you enter the general address instead of a personal one.



To review and edit Company specific details, click on **My Account** → **My Companies** and select your company from the list.

After clicking on your company name, the following view with expandable sections is displayed:



Each section can be expanded by clicking on the name of the section.

General company information includes company logo and DTS system generated fields (Company ID, Last Modification Date).

Company attributes includes system-generated attributes about your company's incoming and outgoing biomass volumes, including balance. This is a read-only section and cannot be modified by the user.

Custom company information incudes company contact details (Contact Person First Name, Contact Person Last Name, Contact Person eMail, Company City, Company Postal Code, Company Country, Company VAT Number).

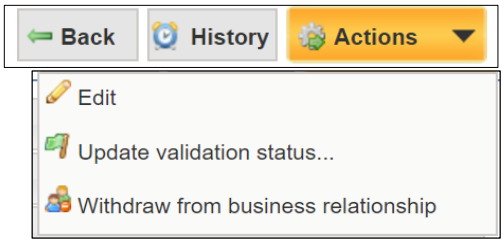
SBP Certification includes details about SBP Certification (Certificate Number, Certificate Expiration Date, Certificate Date of Issue, Status). This section is managed by SBP directly and cannot be edited by the user.

This section also includes SBP-related documents (SAR, static biomass profiling data), which are also uploaded to the system by SBP. Note that only SBP-approved SAR documents will be uploaded to the DTS. **SAR documents that are not SBP-approved will not be uploaded to the DTS and will need to be sent**

to your customer by email. Please contact penny.bienz@sbp-cert.org for any SAR document approval enquiries. Static Biomass Profiling Data document will be uploaded to the DTS together with approved SAR document. Documents uploaded to this section are available to you, your Certification Body and to all companies that are linked with you via a 'Business Relationship'.

Attachments include company-specific documents, which companies can upload themselves (for example, a copy of the certificate etc).

All editable fields can be edited after clicking **Actions** → **Edit:**



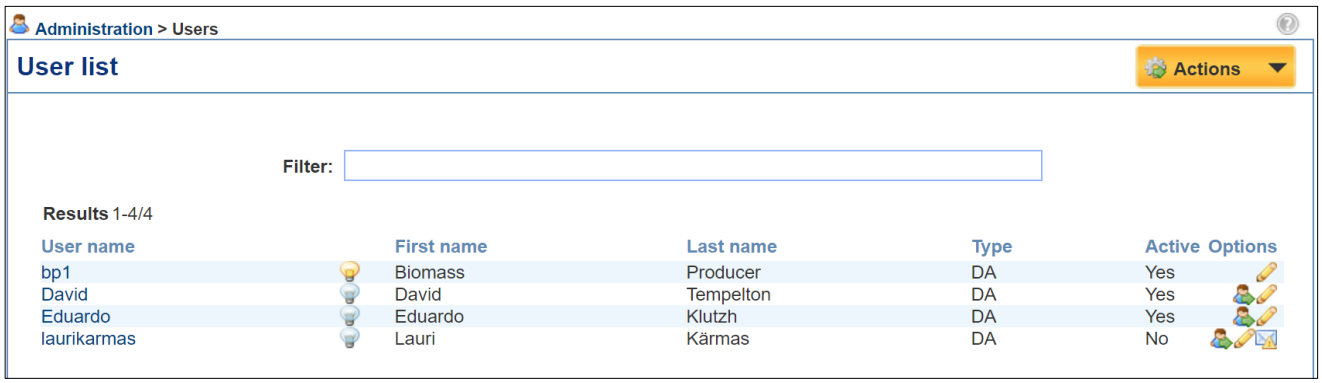
Note: In preview mode, fields without data are not visible. Please enter Edit mode to see full list of fields.

2.3 Managing and adding internal users

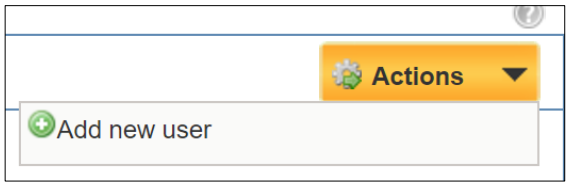
After your company's primary contact person has received login information for the first time and successfully logged into the DTS portal, it is possible to add more internal DTS users. This could be used in cases where more than one person within a company needs to have access to the DTS.

To see an overview of all DTS internal users go to **Administration** → **Users.**

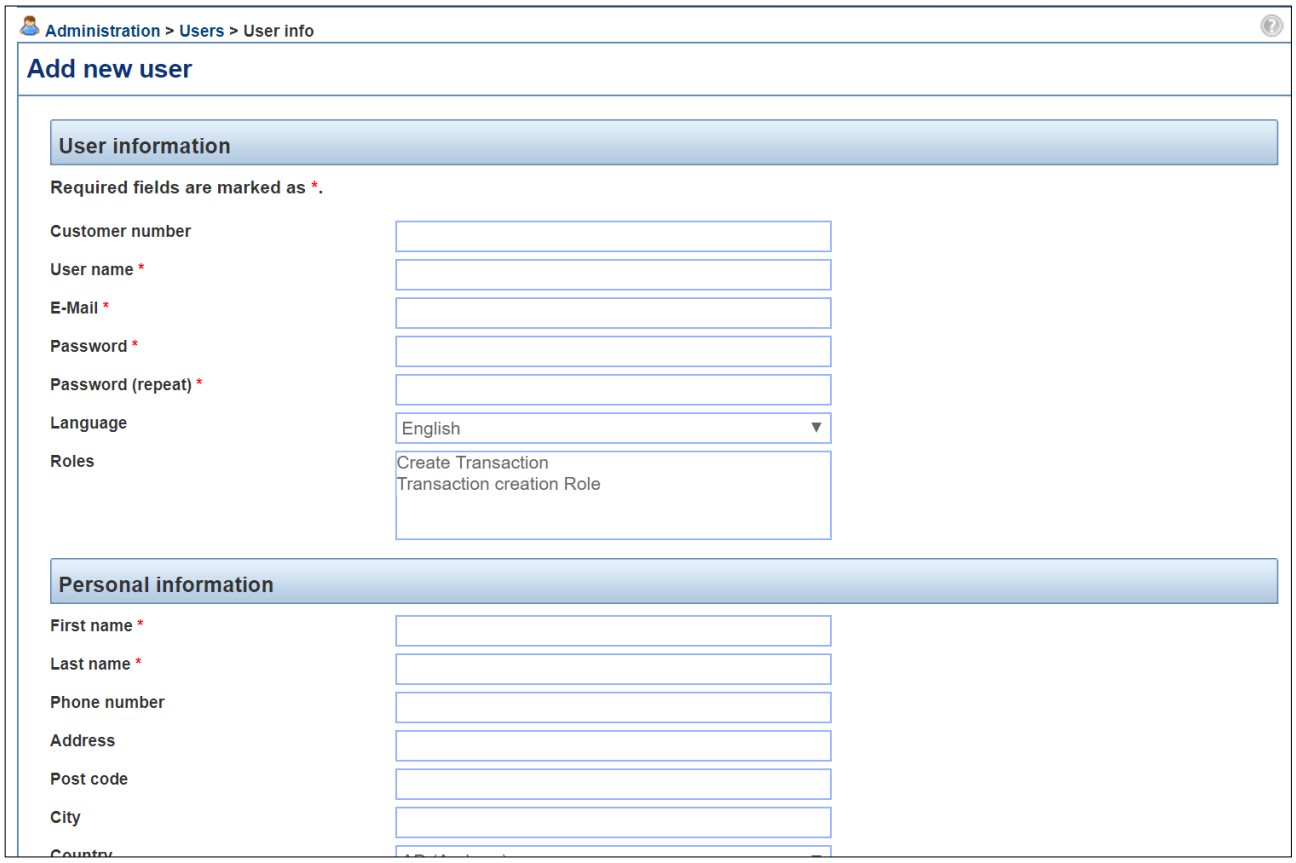
This view shows you all current internal DTS users. By default, only one active user, the primary SBP contact person, is displayed here.



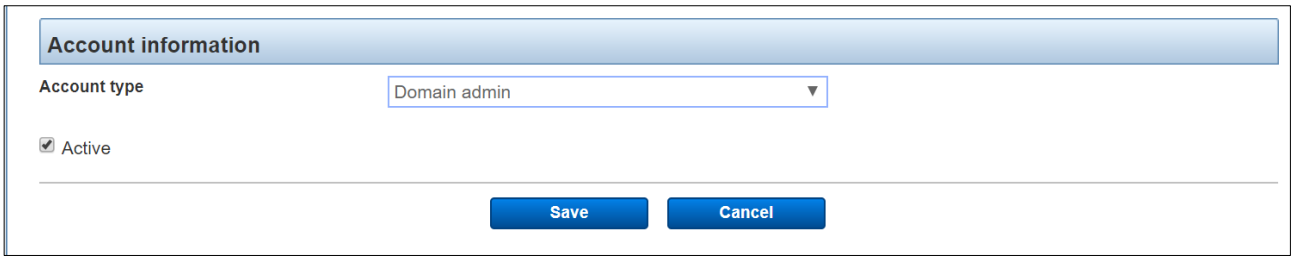
To add more users, click on the yellow **Actions** button and then **Add new user.**



To set up a new internal user, fill in all relevant fields and click **Save.**

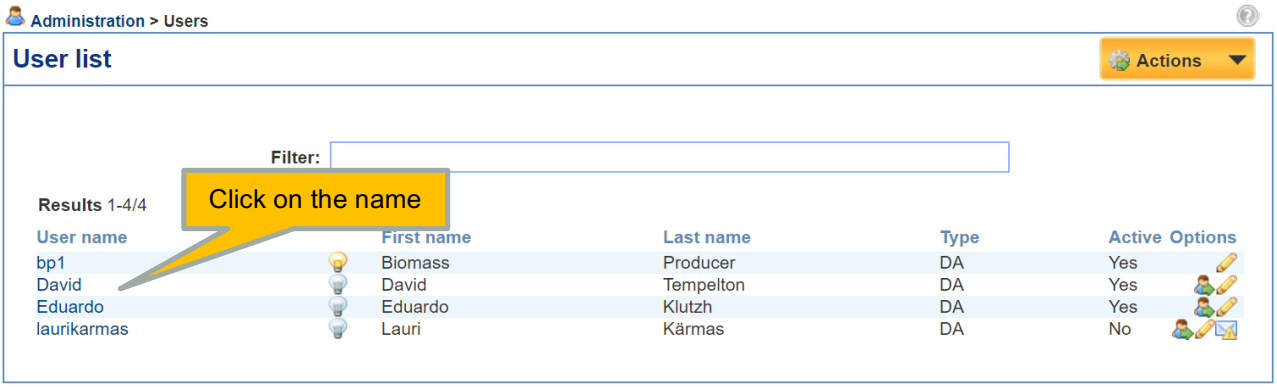


Note: Required fields are marked with a red asterisk. After logging in to the poral, user can change the password.

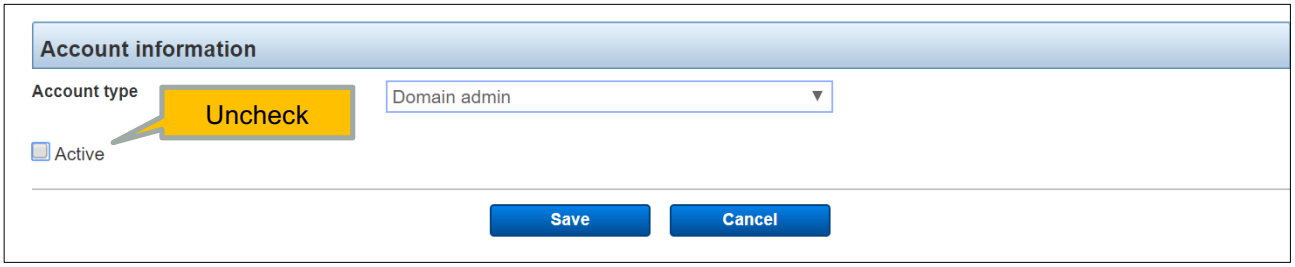


Account type field defines which type of user do you want to create. Available options are "**Domain Admin**" and "**Common user**". Domain admin type of user has permissions to add new system users by themselves.

Deactivating an internal user can be done from the same user administration view. To deactivate a user, open the user record by click on the **User name.**



Then uncheck the checkbox **Active** and **save**.


Account information
Account type
Uncheck
Domain admin
Active
Save
Cancel

3 Business Relationships

The fundamental change in the DTS v1.0, compared to the previous 0.5 version, is that in order to receive claims or make claims by yourself you have to establish a Business Relationship with your suppliers and customers within the DTS. Business Relationships form a supply chain.

Three different types of business relationships are available:

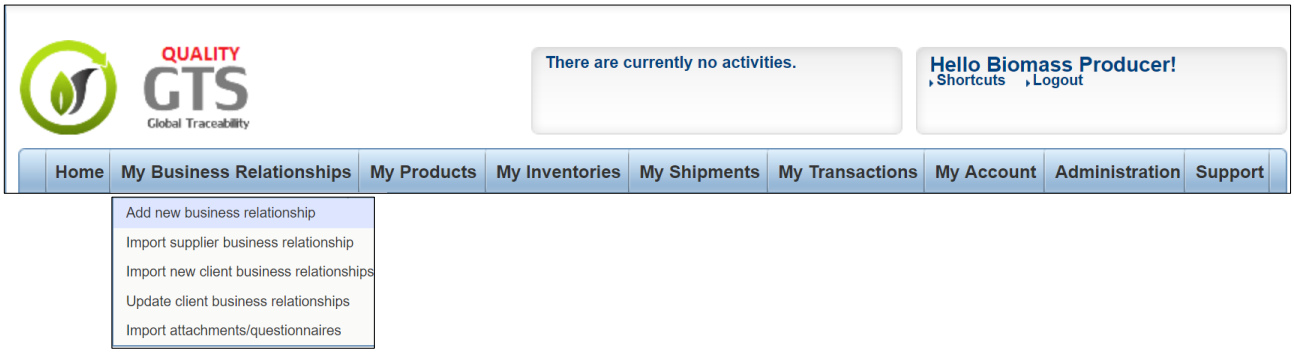
- Supplier relationship
- Client relationship
- Supervisory relationship (SBP, CB)

By default, all certified companies and approved CBs will have a Business Relationship with SBP and all certified companies will have a Business Relationship with their CB. This means that the first time you enter the system you will see two Business Relationships – one with your certifier and another one with SBP.

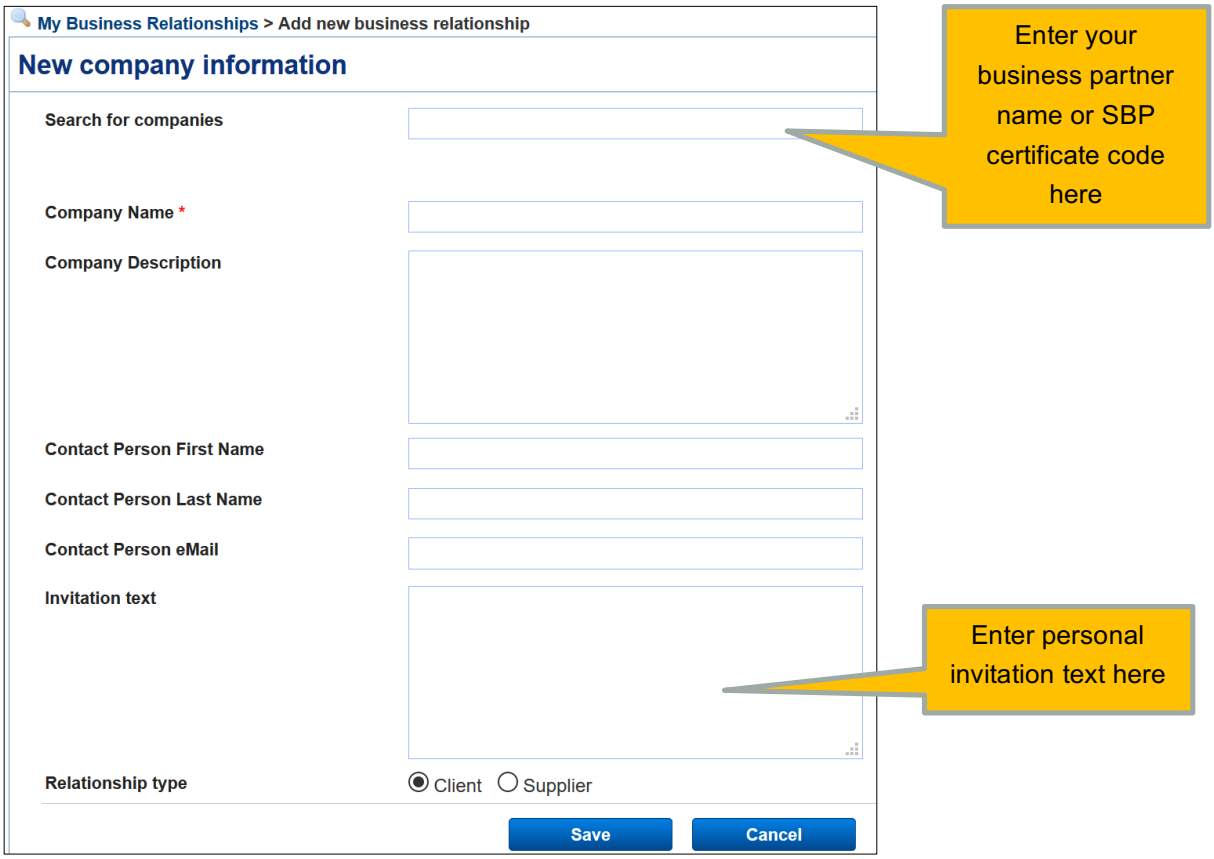
It is up to you as the user to add new Business Relationships with suppliers and customers. New Business Relationships can be added by any user at any time. All companies you are connected with can see details about your company, including documents uploaded to your company record. Supervisory accounts can also see transaction data.

3.1 Adding new Business Relationships

To add new Business Relationship, log in to the system and move the cursor to **My Business Relationships**, then click on **Add new business relationship.**



All SBP-certified companies have already been entered to the system by SBP, this means you can use the search bar to find your business partner from the system. It is possible to search by company name or SBP Certificate Number.

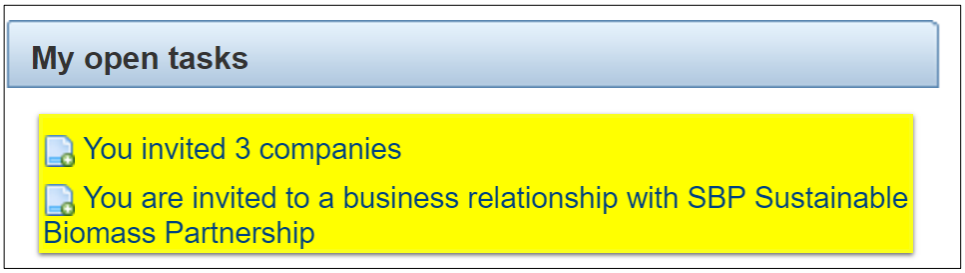


After typing in the company name or SBP certificate number, the system will populate all the other company-specific fields; these should not be changed. You can add your personal invitation text, which will be sent to your business partner's email together with the invitation.

As a last step, you should define the Relationship type and hit save.

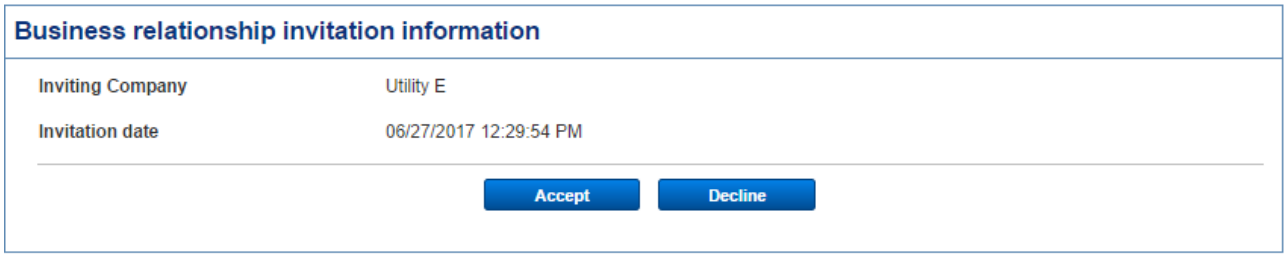
Note: In case your business partner is both your customer and your supplier, please select "Supplier". This does not limit functionality in the system, but can be used when filtering data at later stages.

After sending the invitation to connect, the system sends an automatic email to your business partner with your request. In addition to the notification email, a notification will be sent within the system and will be shown on the DTS home screen under open tasks:



Under **My open tasks,** all invitations to you will be displayed.

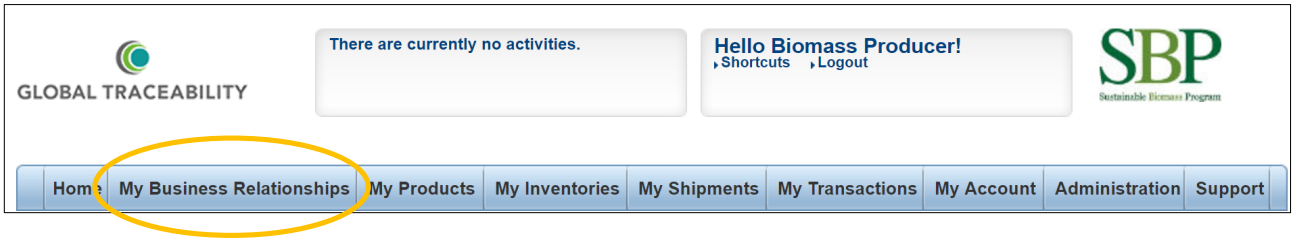
It is possible to **Accept** or **Decline** a Business Relationship invitation after clicking on the notification:



In the case of **Decline,** a reason for declining shall be entered and this will be shown to the inviting company.

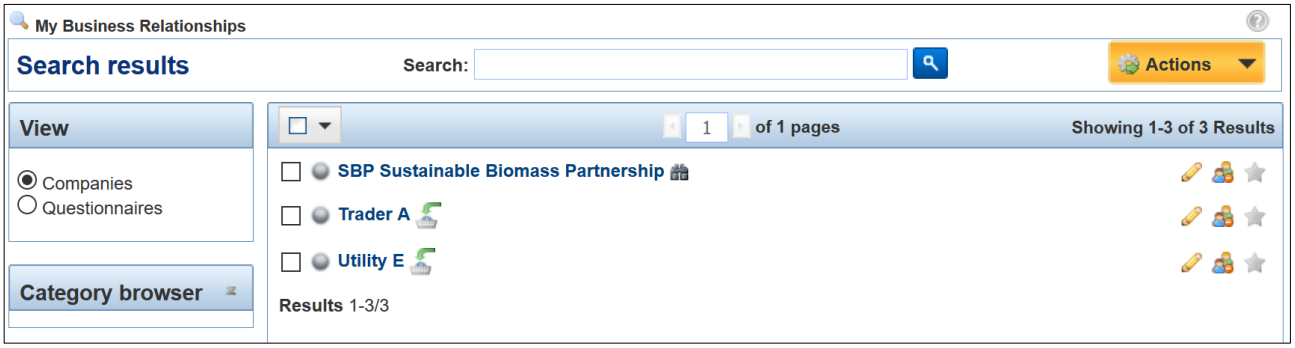
After **Accepting** the Business Relationship invitation, a notification will be displayed that the new relationship has been successfully established.

Open invitation will disappear from the DTS home page tasks area and you will see your business partner under the **My Business Relationships** menu.



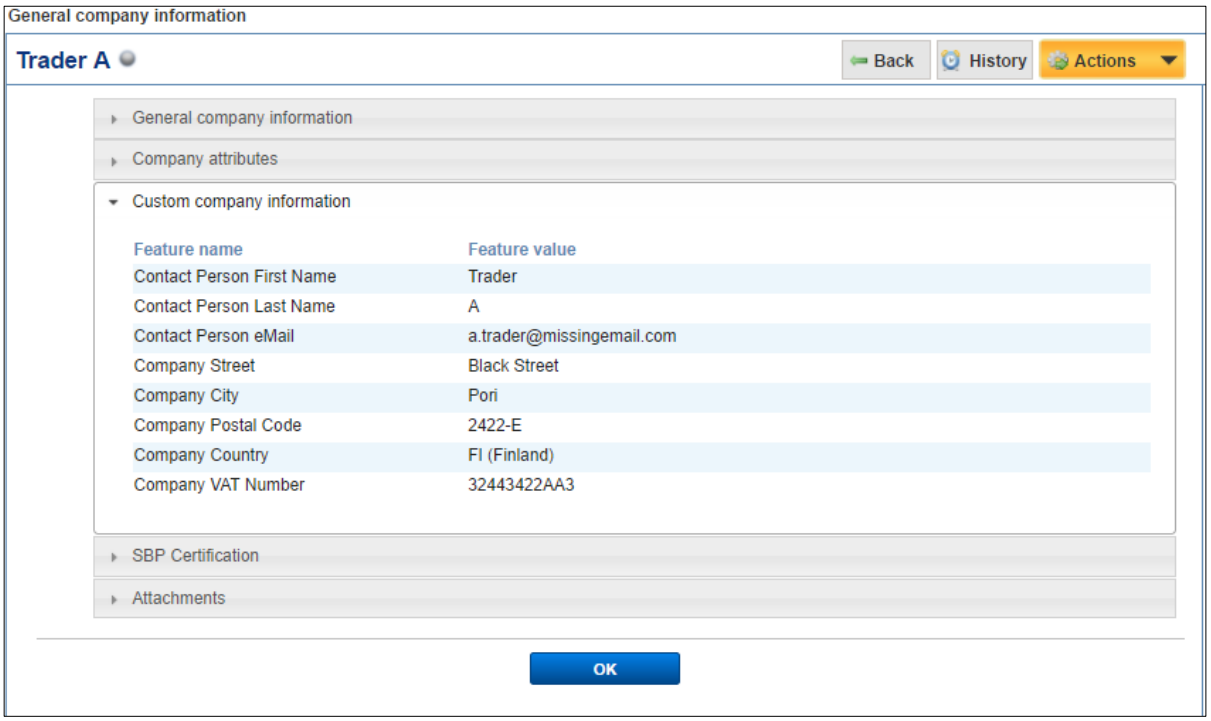
3.2 Managing Business Relationships

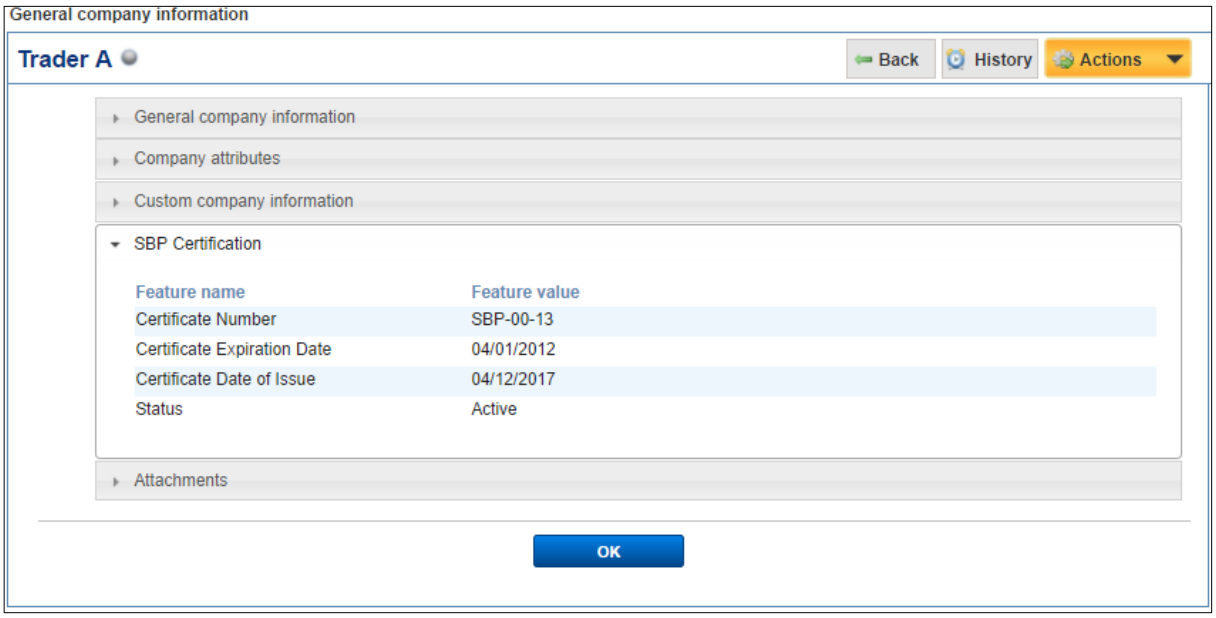
It is possible to view all your active Business Relationships under **My Business Relationships.** Clicking on any of the company names will reveal more details.



Note: The general assumption is that Business Relationships are established with all your direct suppliers and customers. This allows visibility of company data and Standard 5 documents between you and your supplier/customer. In cases where the supply chain includes more links than a producer and the end-user of the biomass, the end-user (or any other party who has purchased your biomass, but does not have direct business relationship with you) may need to establish a separate Business Relationship in the DTS in order to access the Biomass Producer's data. The alternative is to send these documents outside the DTS.

In the detail page of the connected company, you can see contact person details, Company information and SBP certification information, including SBP-approved SBP Standard 5 documents.

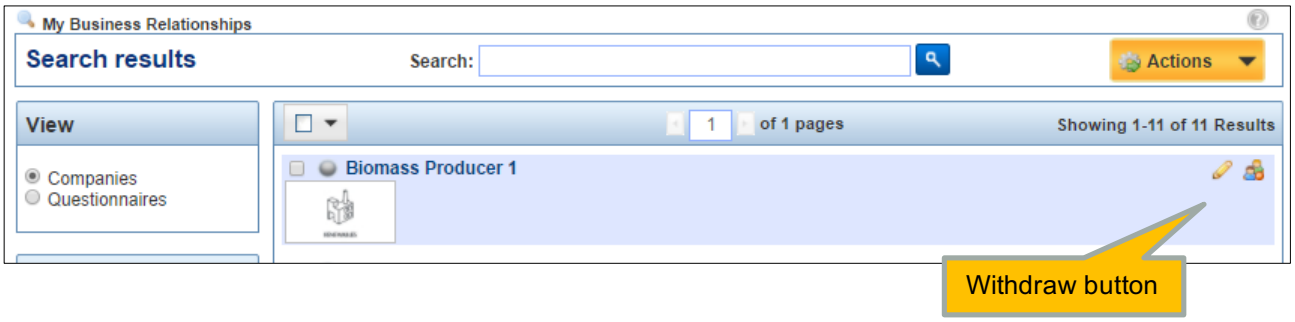




3.3 Withdrawing from a Business Relationship

At any time, it is possible to **Withdraw** from a Business Relationship with a supplier or a customer. This means it is no longer possible to receive or send claims to this business partner, and you will no longer see their company-specific data and they will not be able to see yours.

Note: It is not possible to withdraw a Business Relationship with SBP or your CB.

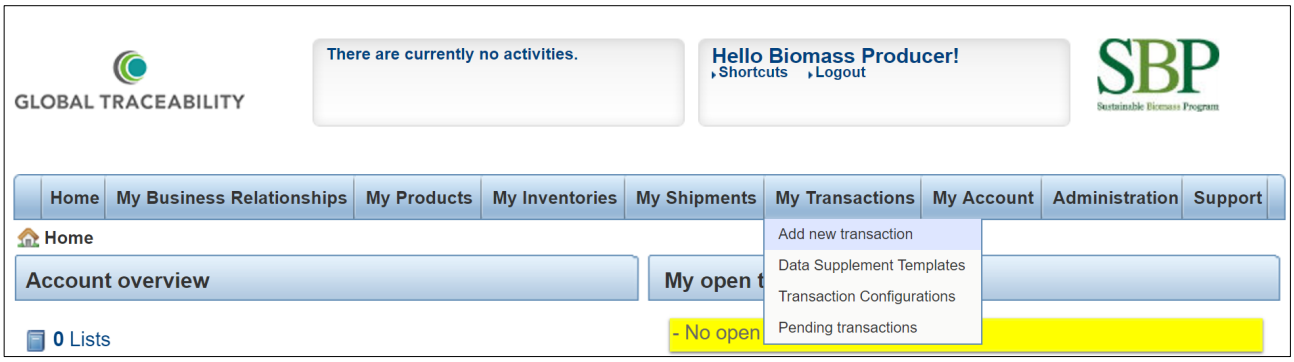


4 Transactions

Transactions are the core content of the DTS and they represent received or sold tonnages of biomass with an SBP claim.

4.1 Creating a new Transaction

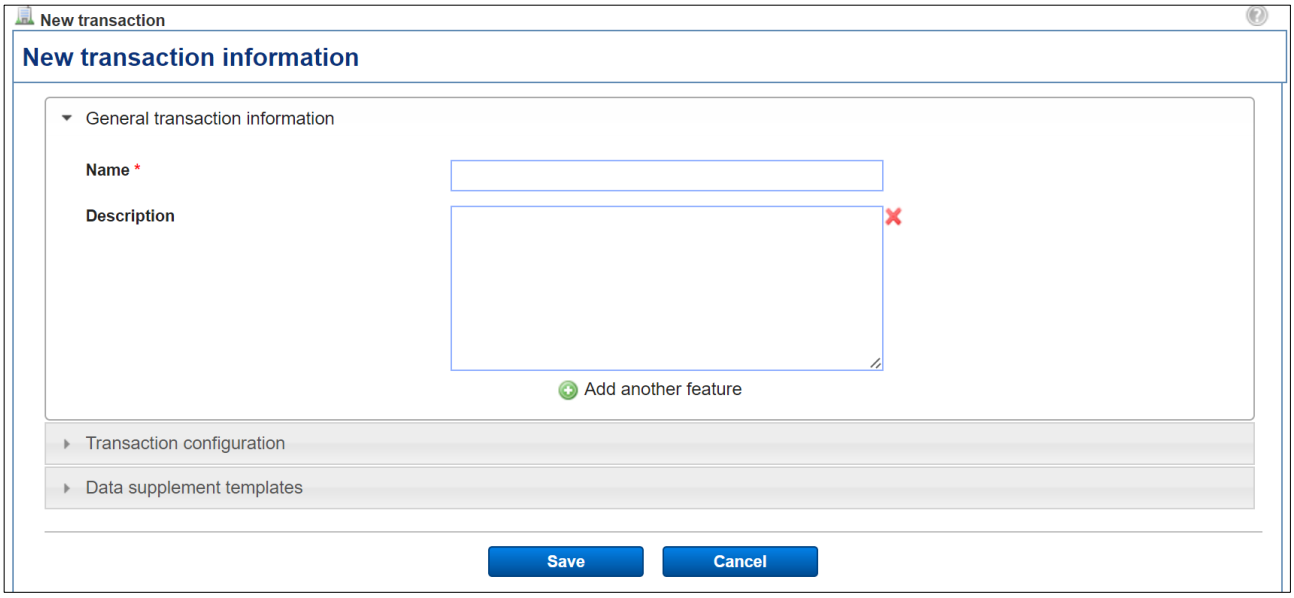
To create a new Transaction, hover your cursor over **My Transactions** and click on **Add new transaction** button.



Firstly, the transaction shall be given a **Name** and a **Description.**

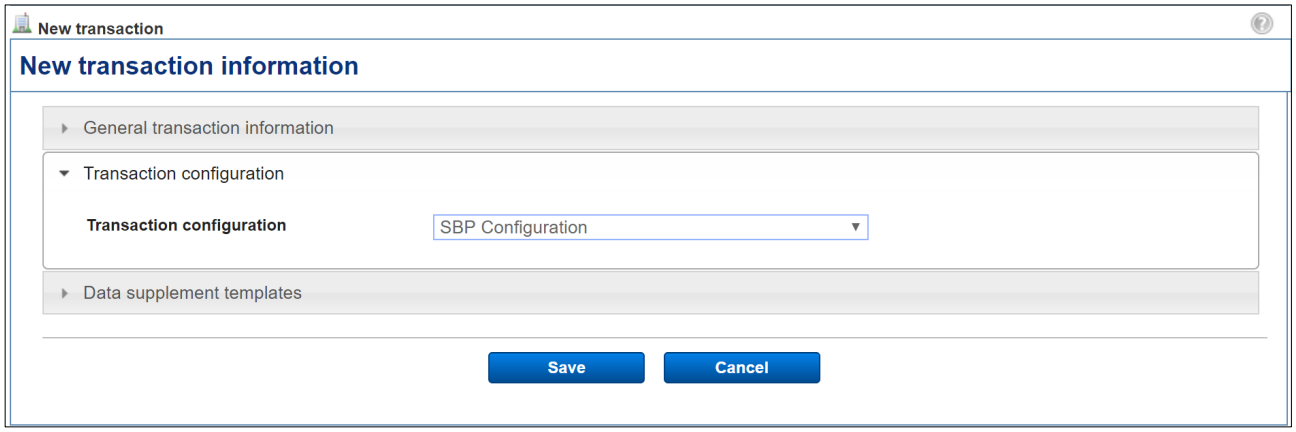
Transaction Name is a required free-text field and is used to differentiate transactions. It is up to the company to decide how to name the transaction. Note that this seller reference and buyer reference is requested at a later stage.

Transaction Description is an optional field to describe the transaction.

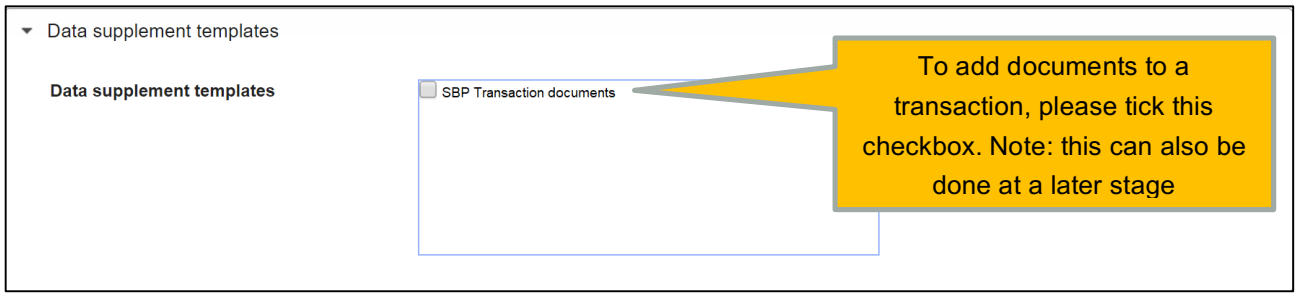


After giving the Transaction a name and a description, click **Save.**

The **Transaction configuration** field is system-generated and defines the available fields. **Currently, only one configuration is available and set as the default. Users do not need to change anything in this section.**

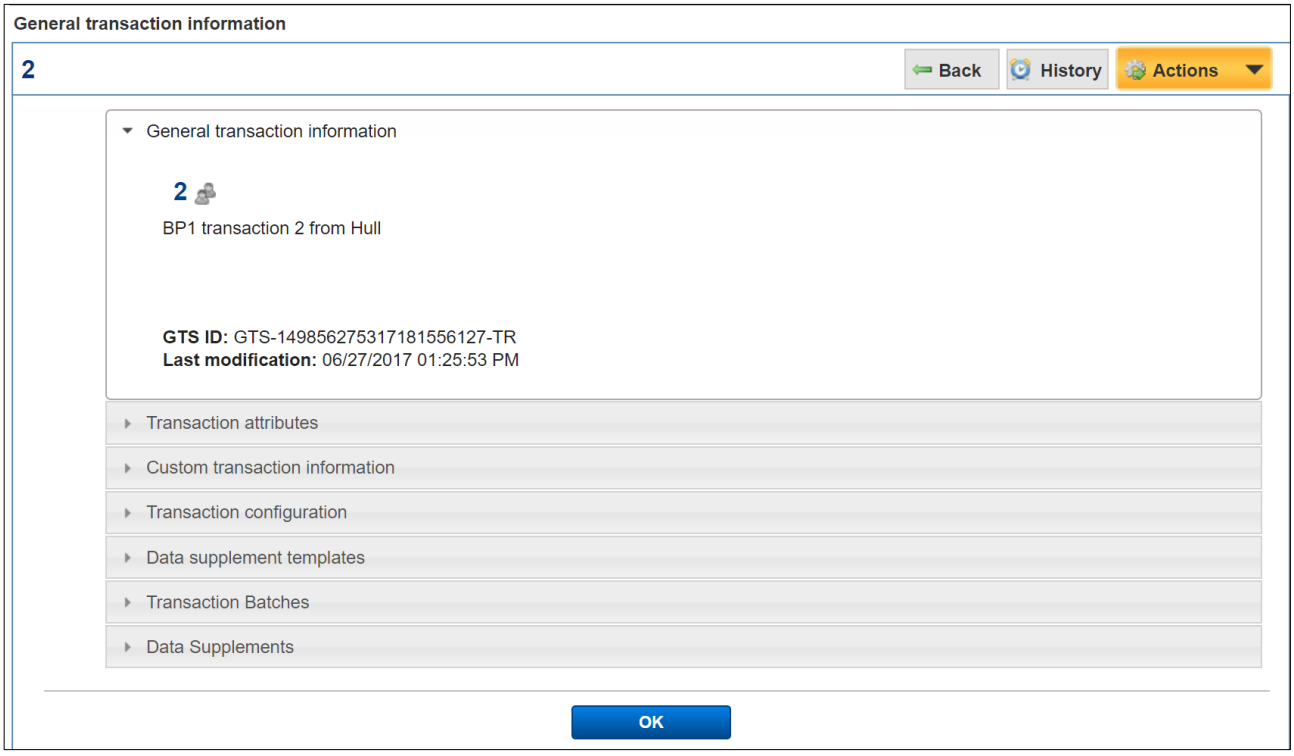


Data supplement templates section is used to attach documents to the transaction directly. Note that SAR and Static Biomass Profiling Data document are available at company level. Transaction document may include SREG document for example.

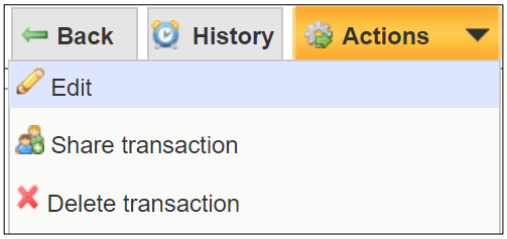


After saving, the transaction record will be created in the system and it will be possible to enter more details. The system will generate a number of automatic attributes in the background (Transaction ID, Modification Date, etc), which will be updated automatically as more data is entered.

Similar to the company record, a transaction record is divided into separate sections, which can be expanded and collapsed by clicking on the section names.

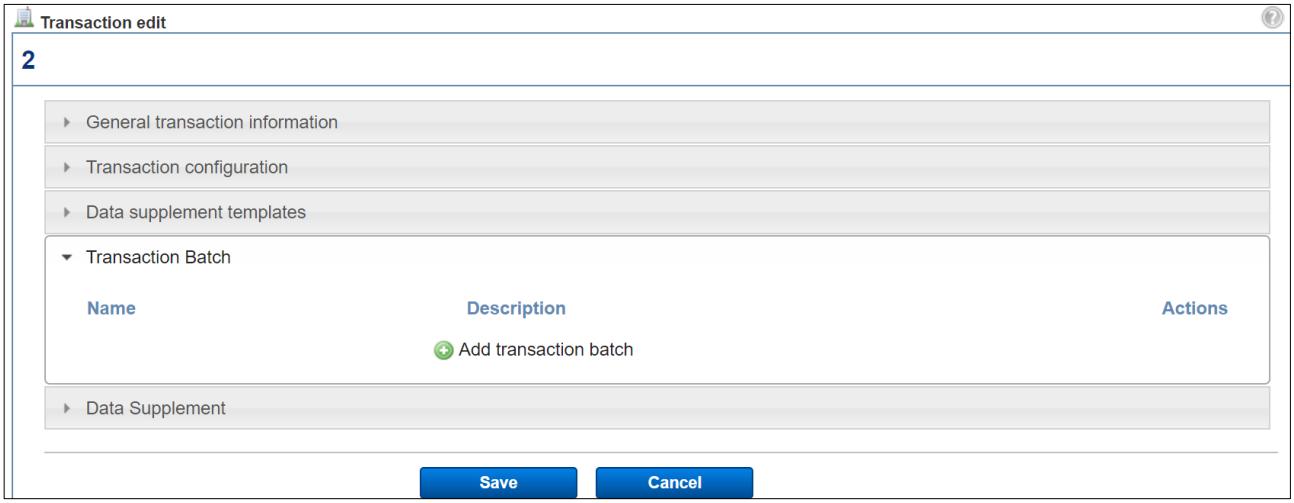


Next, information about transaction batches shall be entered. To enter information about the **Transaction Batches,** move your cursor to the yellow **Actions** button and click **Edit.**

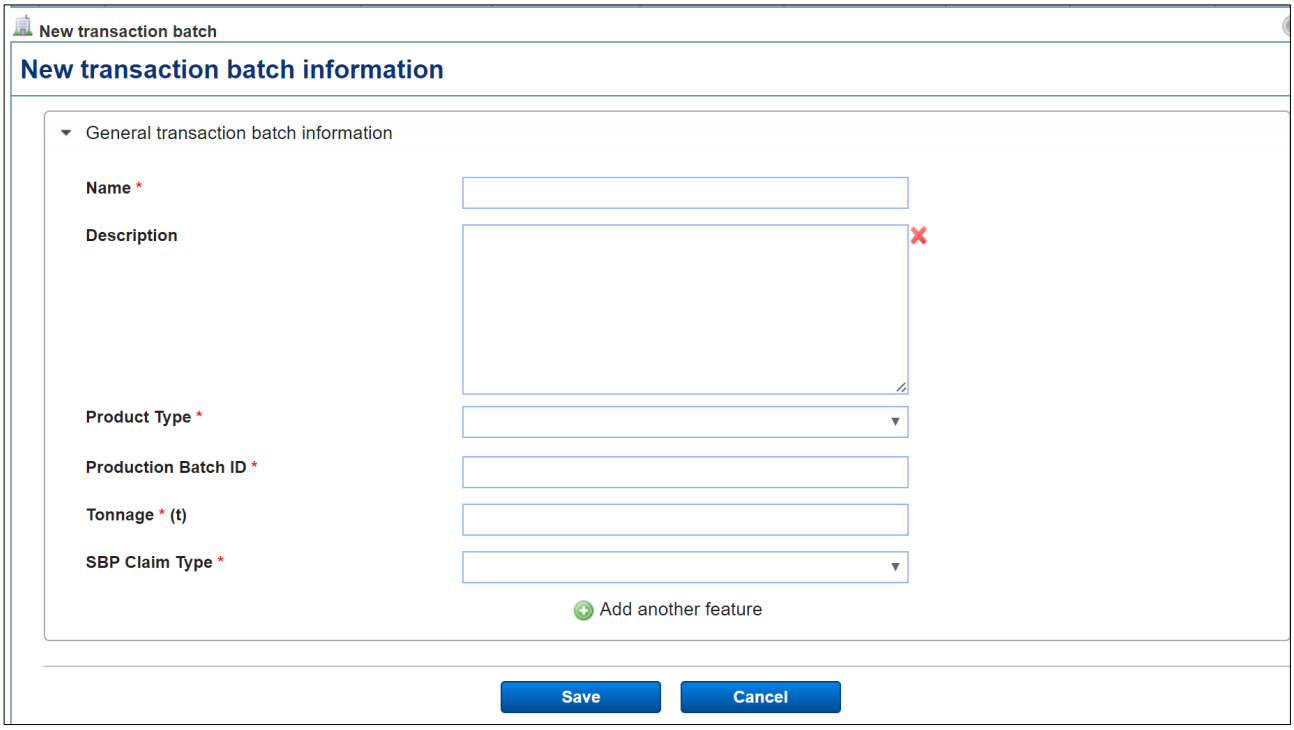


4.2 Creating new Transaction Batches

To add Transaction Batches to the transaction, please expand the **Transaction Batch** section in Transaction Edit mode. Then, click **Add transaction batch** button.



Next, enter the Transaction Batch information.



Transaction Batch Name is a required field to differentiate transaction batches in a transaction. It is a free-text area and it is up to the user to name the transaction batch.

Transaction Batch Description is an optional field to add a description to the batch (for example, factory name etc)

Production Batch ID shall be in the form: “SBP-XX-YY-ZZ-AA”, where SBP-XX-YY-ZZ-AA is the Static Data Identifier and AA is the Dynamic Batch Sustainability Data Identifier. Unless a BP receives written approval from SBP the value of AA shall be ‘00’. Please see SBP Instruction Document 5A for more details.

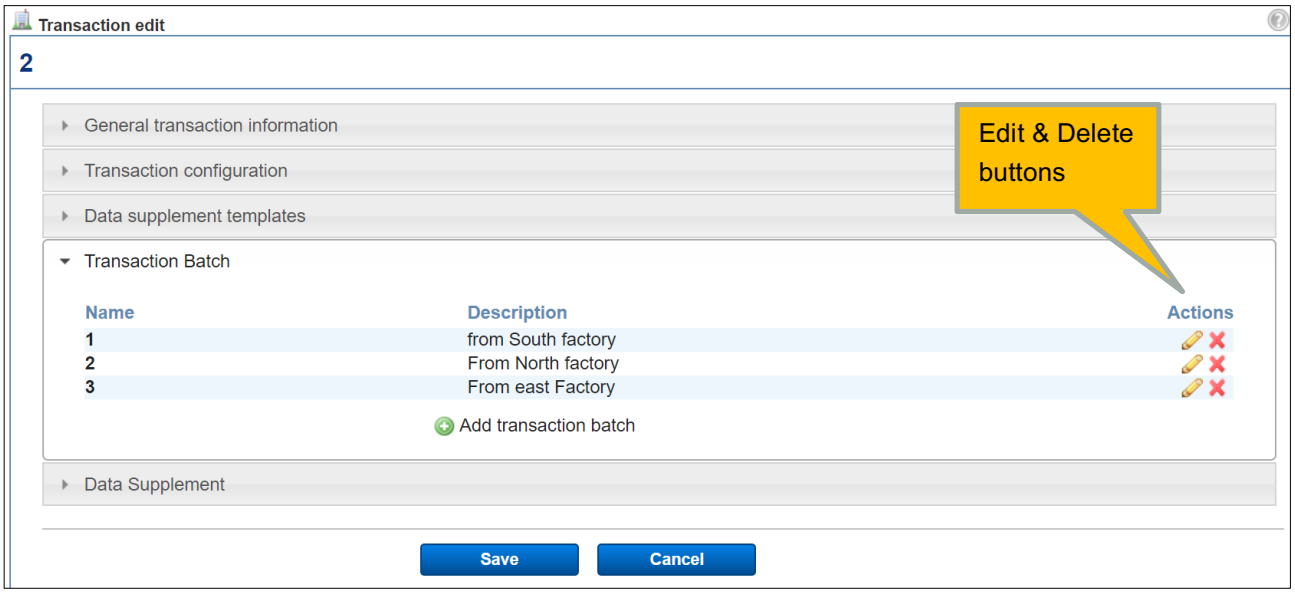
Product type is either chips or pellets

Tonnage (t) is a tonnage of the transaction batch in metric tonnes.

SBP claim type is either SBP-controlled or SBP-compliant. A single transaction batch must be either SBP-compliant or SBP-controlled. If both SBP-controlled and SBP-compliant biomass from the same Production Batch ID is sold in one transaction, separate transaction batches shall be created.

Finally, click **Save.** You can add as many Transaction Batches as needed to a single Transaction.

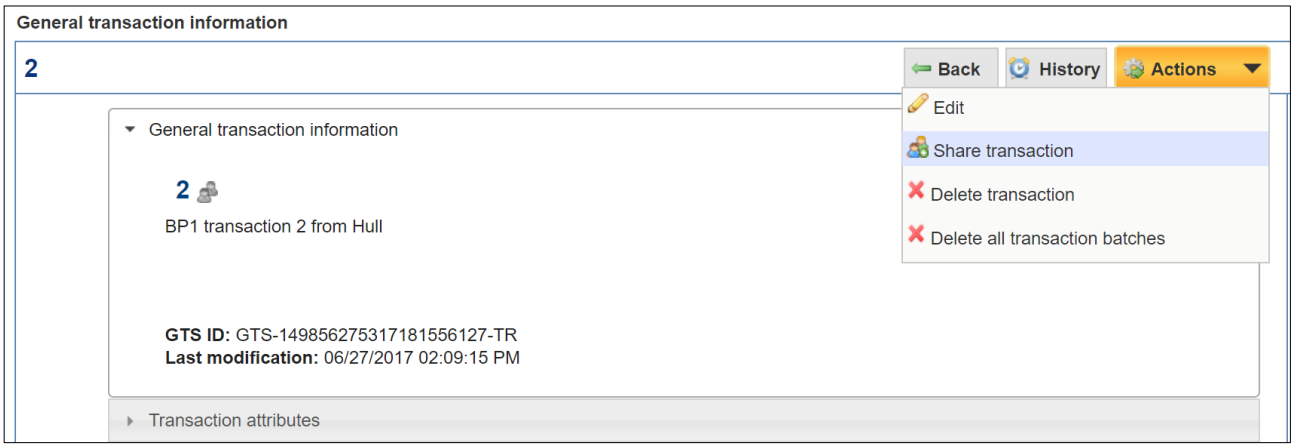
It is also possible to delete a transaction batch or edit it after it has been created. This is only permitted if the transaction is not shared with your customer. Once the transaction is shared, it is not possible to edit data in a transaction.



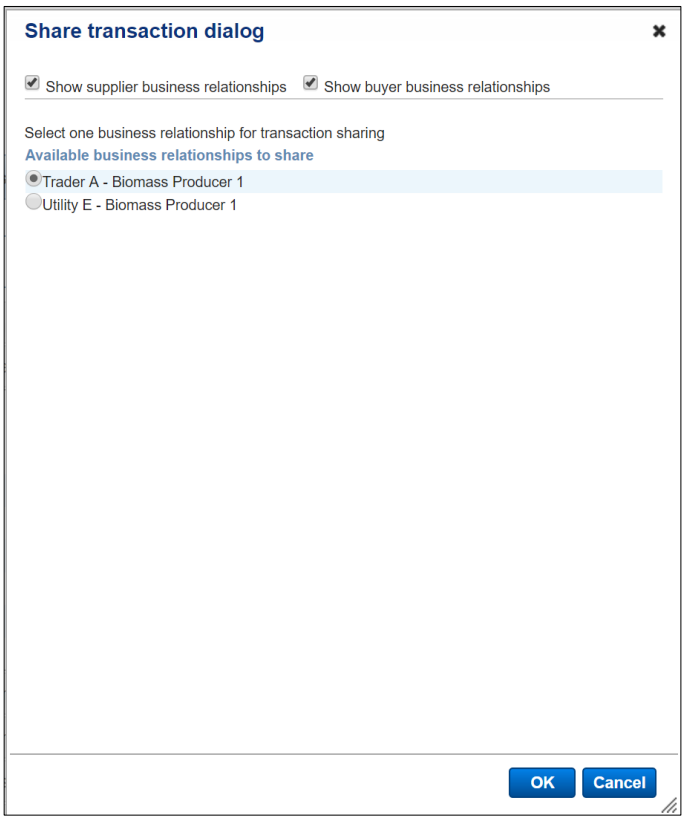
4.3 Sharing transaction

Once you have added Transaction Batches to the transaction, you are ready to share the transaction with your customer and add invoice specific data.

To do this, click on the yellow **Actions** button and then **Share transaction** button.



You will then see a list of the companies you have established a Business Relationship with. You can filter your Business Relationships by Type (Supplier/Client).



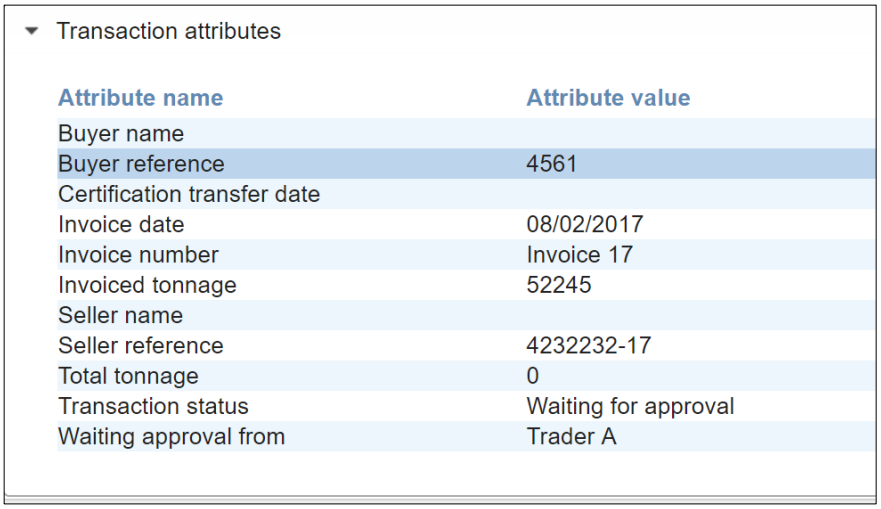
Note: You cannot share a transaction with a client who is not connected with you via Business Relationship (except non-certified customers, see section “Selling to non-certified customers”).

After selecting your customer from the list and clicking the **Next** button, a new pop-up window will appear, where invoice-specific information shall be defined.

Note: A single transaction might not be linked to a single invoice. An invoice can include several transactions.

Once the transaction is shared with your business partner it cannot be shared with another customer and it will be in read only mode; no modification of the data is possible. The transaction overview will also show the status of the transaction.

Transaction attributes section includes system-generated attributes, which are updated automatically.



Transaction attributes

Attribute name	Attribute value
Buyer name	
Buyer reference	4561
Certification transfer date	
Invoice date	08/02/2017
Invoice number	Invoice 17
Invoiced tonnage	52245
Seller name	
Seller reference	4232232-17
Total tonnage	0
Transaction status	Waiting for approval
Waiting approval from	Trader A

Buyer name field is updated after the transaction is shared with your customer and your customer has accepted the transaction.

Certification transfer date field shows the date when the transaction is accepted in the DTS. This is different from the **Transfer date**, which shows the date when the transaction took place (Invoice Date or Bill of Lading Date).

Seller name field is updated after the transaction is shared with your customer and customer has accepted the transaction.

Total tonnage field is automatically calculated based on the sum of the tonnages of all transaction batches in relation to the transaction. The Total transaction tonnage field can be different from the Invoiced tonnage field value, as invoiced tonnage could be a sum of more than one transaction.

Transaction status field is updated automatically after creation, sales, acceptance and consumption of the transaction.

4.4 Selling to non-certified customers

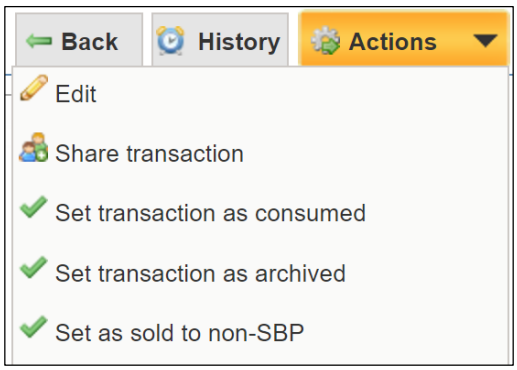
In some cases, SBP-certified biomass is sold to organisations that are not themselves SBP-certified. As DTS access is only granted to SBP-certified entities, it is not possible to create a Business Relationship with non-certified organisations and therefore not possible to share transactions as described in the section “Sharing Transaction”.

In order to sell SBP-certified biomass to non-certified organisations, create a new transaction as described in the section “Creating new transaction” and add transaction batches as described in the section “Creating new Transaction Batches”.

The name of the buyer and invoice reference should be entered to the Transaction Description field when creating the transaction.

After the transaction has been created and transaction batches added, click on the yellow **Actions** button and click “Set as sold to non-SBP”.

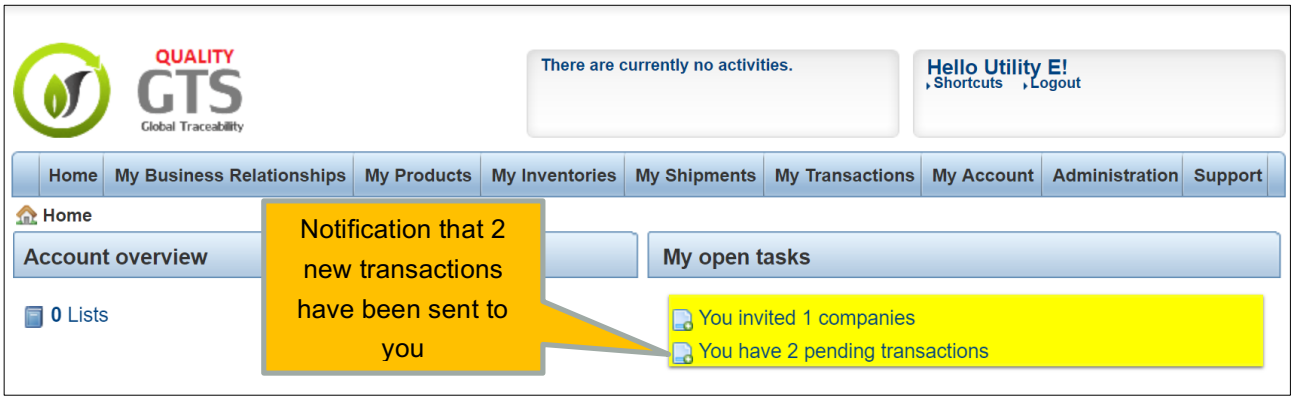
In cases where traded biomass is sold to non-SBP certified customers, first accept the transaction from your supplier, then open the transaction from the transactions overview and repeat the step.



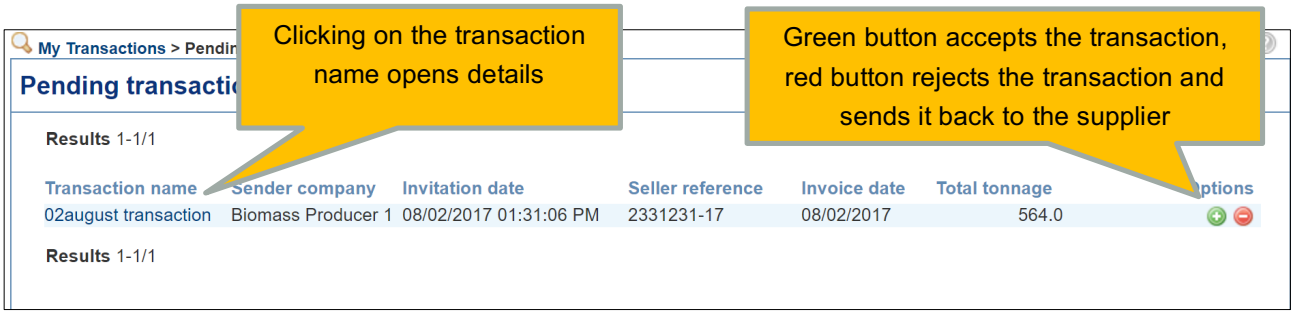
This will update the transaction status to “non-SBP” and locks it to prevent further editing.

4.5 Accepting and Rejecting transactions

A notification is sent to the buyer of the biomass after a transaction has been shared with them. The notification is displayed on the DTS home page after logging in to the portal.



After clicking on the **Pending transactions** notification, a more detailed page will open, where it is possible to preview the transaction details and accept or reject the transaction.



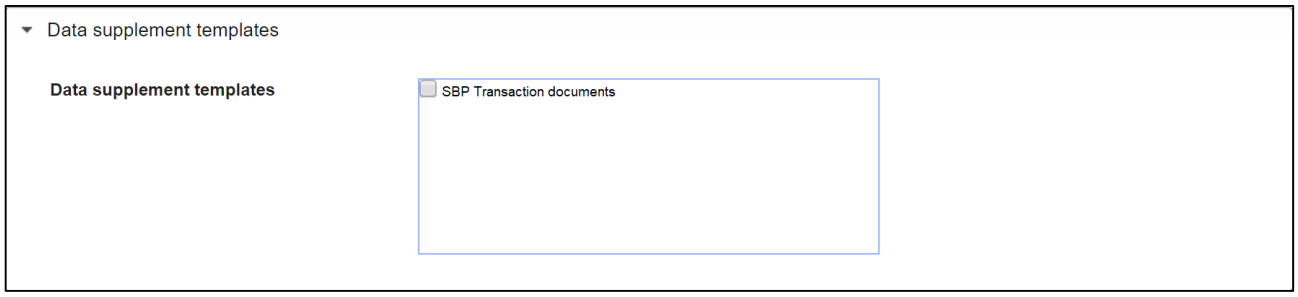
Acceptance of the transaction updates the status of the transaction to “Accepted” and updates other transaction attributes. After accepting the transaction, the transaction is moved from the Pending transactions list to the general My Transactions list.

Rejection of the transaction can be used in cases where during the preview of the transaction something is found to be incorrect and supplier needs to make changes to the transaction. Rejection of the transaction sends the transaction back to the supplier and the transaction becomes unlocked for the supplier to make the necessary changes. After making the changes, the supplier can share the transaction with the customer again.

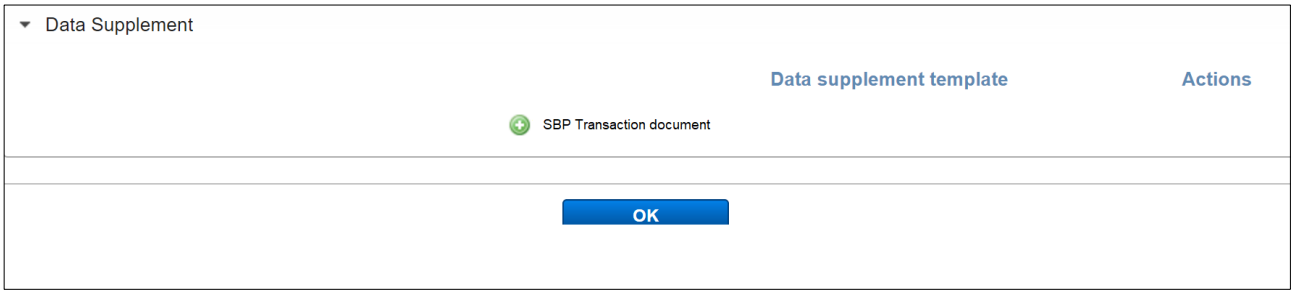
4.6 Adding SREG to a transaction

It is possible to supplement the data in the transaction with attachments such as the SREG. All data supplements/attachments will be available to all subsequent owners of the biomass. For example, BP1 sends a transaction to Trader A, Trader A sells it to Trader B and Trader B sells it to the End-user in the DTS. Assuming both Trader A and Trader B add SREG attachment to the transaction, the End-user will be able to see both SREG attachments on the transaction and Trader B will be able to see Trader A's SREG attachment.

To add a new Data supplement (Attachment to the transaction), expand the **Data supplement templates** section on the transaction record in edit mode, select **SBP Transaction documents** and click **Save**.

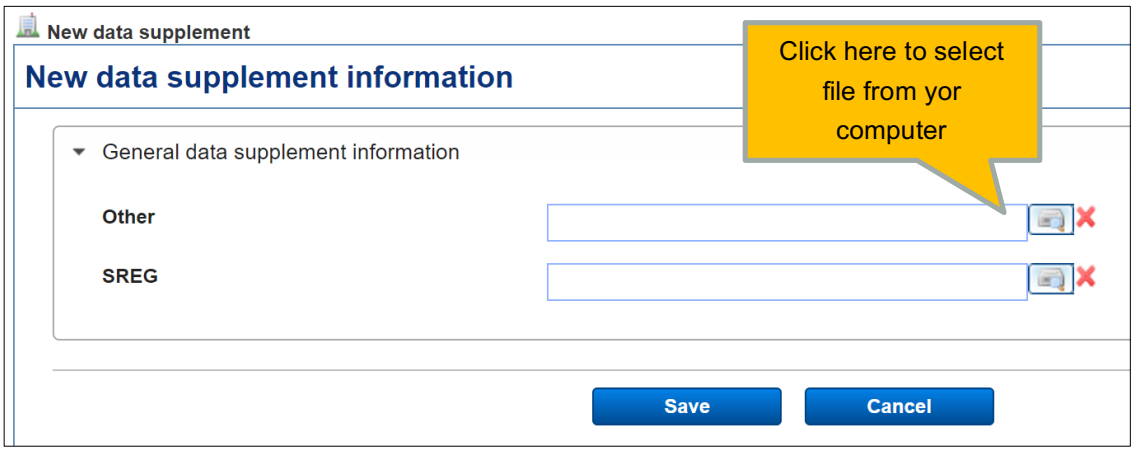


After saving, go to **Edit** mode and expand **Data Supplements** section.

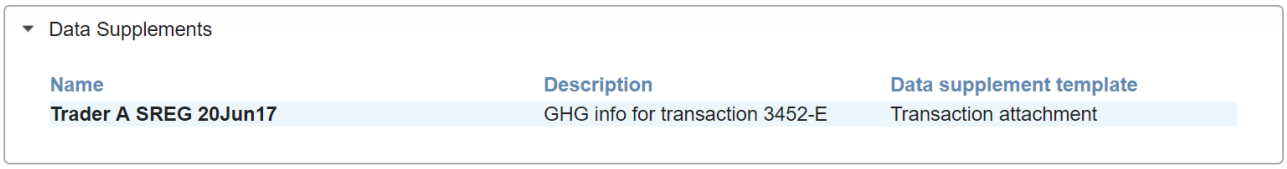


Click on **SBP Transaction document** button.

In the next view, it is possible to add two different documents to the transaction.



The attached document is then added to the transaction and accessible for next customer.

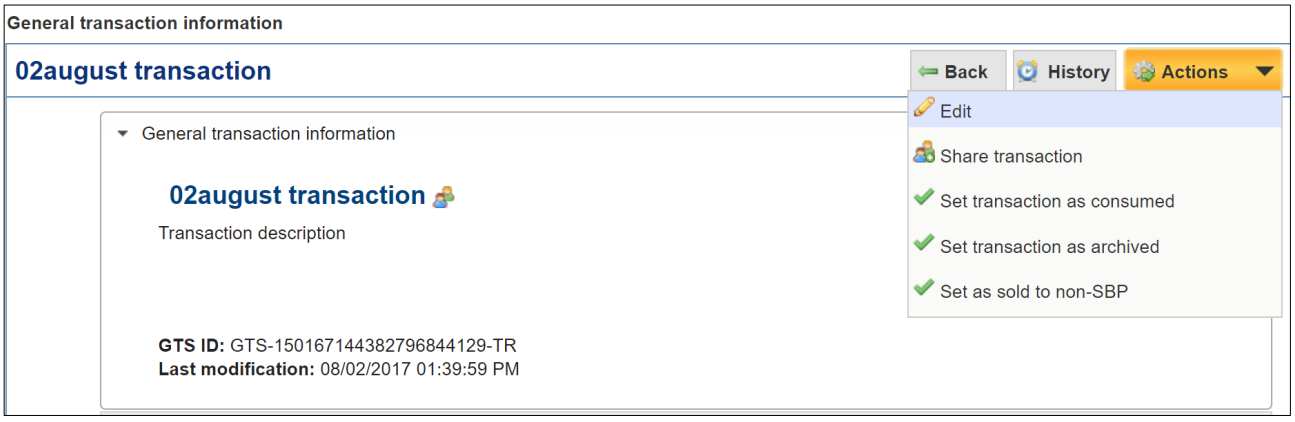


4.7 Direct trading of transaction/biomass

In order to make trading activities more user-friendly in the DTS, traders have an option to directly re-share the transaction that they have received from their supplier. Note that this solution can only be used when a transaction with exactly the same attributes is to be traded to the next customer. In such cases, the original transaction name and Biomass Producer name are also visible to the next owner of the transaction in the DTS under the Transaction attributes section.

To do this, the incoming transaction from the supplier must be accepted in the DTS first. Then, the transaction to be re-shared shall be opened from **My Transactions** section. On the transaction, the steps under section **"Sharing transaction"** or **"Selling to non-certified customers"** should be followed.

It is possible to add documents (for example, SREG) to a transaction while directly sharing it with the next customer. To do this, open the received transaction from the transactions list and go to **edit** mode:



In **Edit** mode, repeat the steps described in section 4.6.

Note: All attachments added to the transaction by different links in the supply chain will be visible to next owner of the transaction in the DTS. Example: Biomass producer adds a SREG document ot the transaction, shares the transaction with a Trader A. Trader A can access the SREG document and add more documents to the transaction (they cannot delete or edit document from the Biomass Producer). After Trader A shares the transaction with End User A, End User A can see transaction documents from the Biomass Producer as well as from the Trader A.

4.8 Trading biomass (combining/splitting transactions)

In cases biomass in not directly shared with the next legal owner (Transaction and transaction batches do not need to be changed, only new invoice specific info is changed and additional transaction document added), but is either unloaded in storage facilities and sold later; combined with biomass from other producers or split between different customers, following steps shall be undertaken in the DTS:

When it is desired to **combine** many small transactions from several producers and sell these as one big transaction in the DTS, the user shall first receive the biomass from the supplier in the DTS.

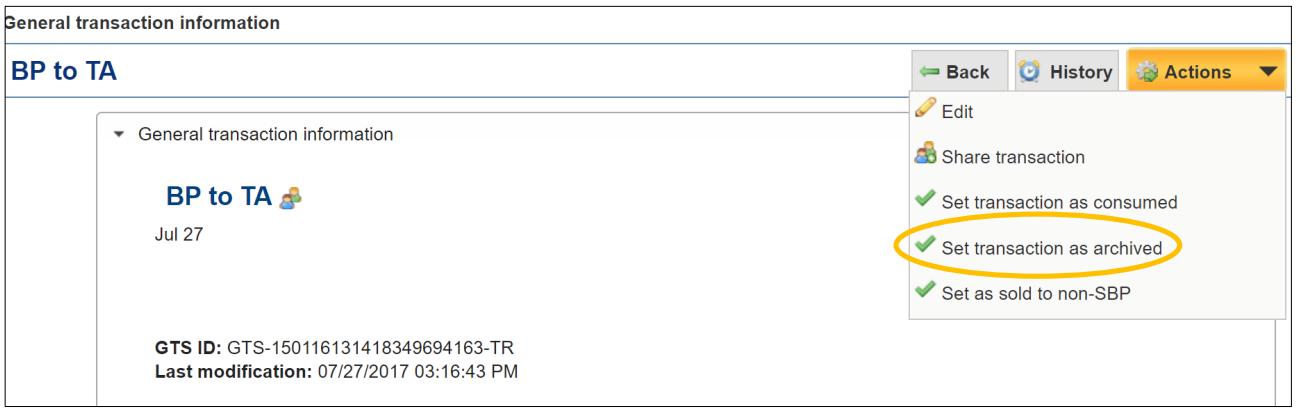
After the incoming biomass transactions have been accepted, a **New Transaction** shall be created.

To create a new transaction, please follow the steps under section 4.1 in this guide.

Next, **Transaction Batches** shall be created manually by the user. Transaction batch can then in this case include up to the same volume of biomass that has been previously accepted by the user in the DTS with the same Production Batch ID and SBP claim. This means it is possible to combine the tonnage of biomass from more than one transactions, which carry the same Production Batch ID and SBP claim. At any time, the volume of sold biomass per Production Batch ID and SBP claim type, shall not exceed volumes purchased with the same sustainability characteristics.

One transaction can include several combined transaction batches (eg one transaction Batch includes combined tonnage of biomass from several transactions with the Same Production Batch ID and SBP claim and the second Transaction Batch includes combined tonnage of biomass from several other transactions with the Same Production Batch ID and SBP claim).

All transactions that are not directly shared with the customer, but are received/accepted and new transaction is created afterwards, shall be Archived.



Archiving the transaction will update the status of the transaction and locks it.

4.9 Overview of transactions

To see a full overview of all Transactions, click on **My Transactions.**

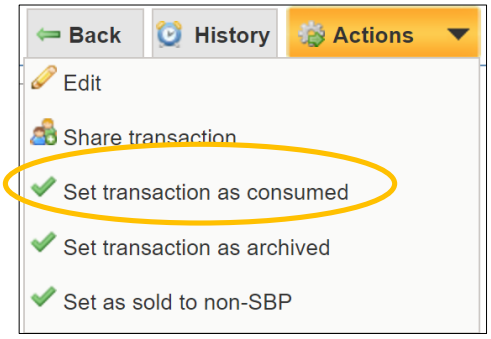
All transactions which are not pending will be displayed in **My Transactions** section.

Note: All transactions that have been shared with your customer or transactions that you have received are locked for editing. Only transactions that you have created yourself and which are not yet shared with your customer or have been rejected by your customer can be edited.

4.10 Setting biomass as consumed (End-users)

End-users of biomass are required to mark all transactions **As Consumed** in the system, after the biomass has been physically accepted from the supplier and consumed in the energy production process. This will lock the transaction and update its status, as well as initiate the tonnage calculation in the background.

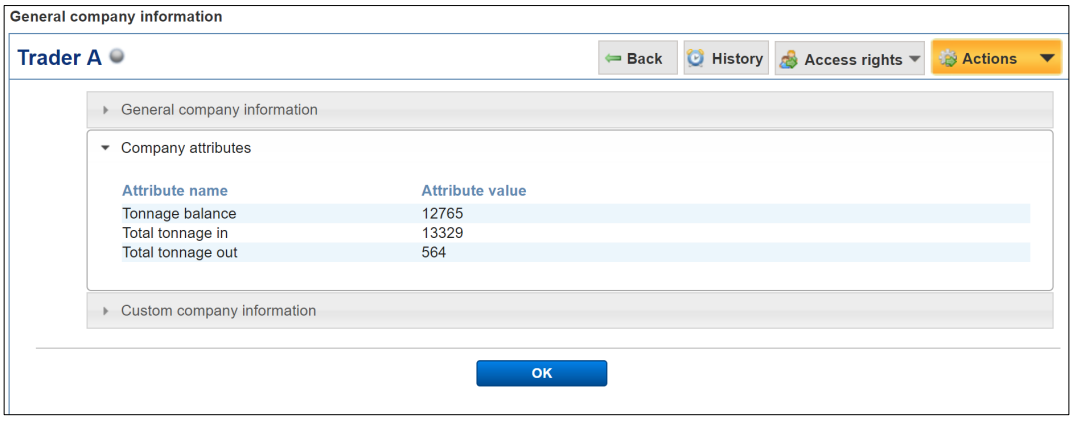
To mark a transaction as consumed in the system, open the transaction in the **My Transactions** list, click on the yellow **Actions** button and then on **Set transaction as consumed.**



4.11 DTS incoming/outgoing tonnage balance

It is possible to view the quick overview of the incoming and outgoing biomass tonnage in the DTS system under my organisation record. This can be used to track that outputs are not exceeding inputs. To access the tonnage overview, click on **My account** and **My companies** and click on your company name.

Next, expand the section "**Company attributes**"



Following logic is applied on the tonnage calculation:

- A tonnage in is updated when a Transaction Batch is created and saved;
- A tonnage in is updated when a transaction has been accepted from a supplier;
- A tonnage out is updated when transaction is shared and accepted by the customer;
- A tonnage out is updated when transaction is set to status “Set as sold to non-SBP”; “Archived”; or “Consumed”;

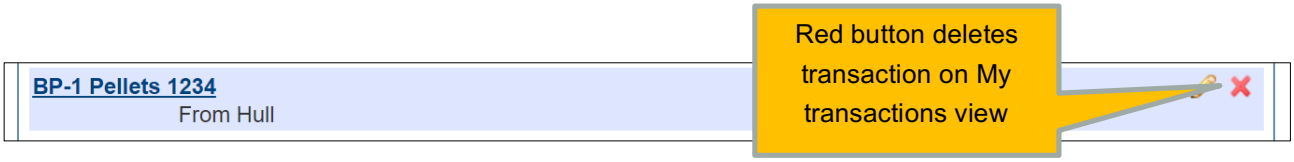
Note: for full overview of the incoming and outgoing biomass volumes by product type, Production Batch ID and SBP claim type, reporting/data export functionality shall be used.

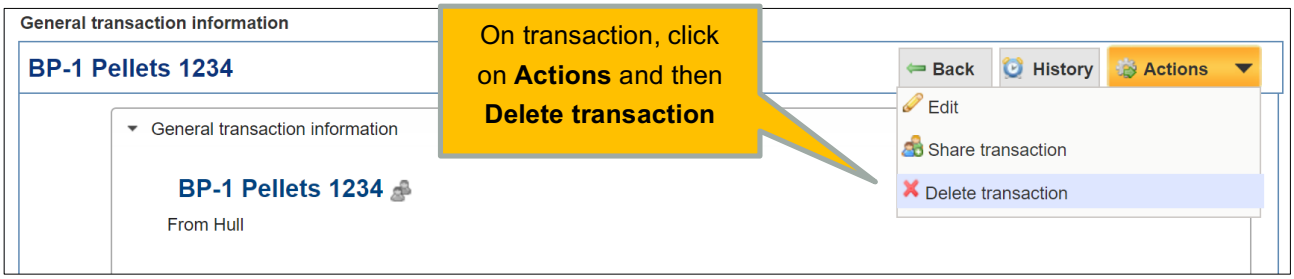
4.12 Deletion of transactions

A user can only delete transactions that are created by themselves and have not yet been shared with any customer.

Transactions can be deleted from **My transactions** view or while in the transaction screen itself, by clicking the yellow **Actions** button and then **Delete transaction.**

Any other transaction deletion requests should be sent to DTS@sbp-cert.org.

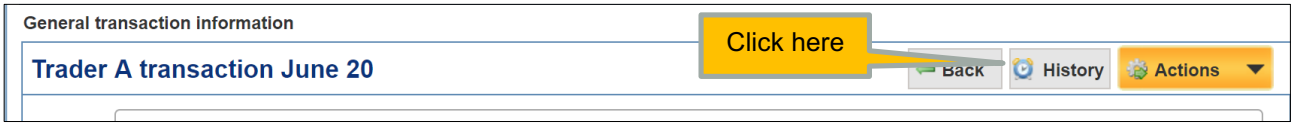




5 History log

DTS v1.0 includes a history logging functionality. This is available for the Company Records, Business Relationships and Transactions.

The history log of a specific record can be accessed by opening the relevant record (either company, business relationship or a transaction) and clicking on the **History** button.



This reveals the whole change history of the record – each data change is logged and time-stamped.

History for transaction: Biomass Producer Transaction 5

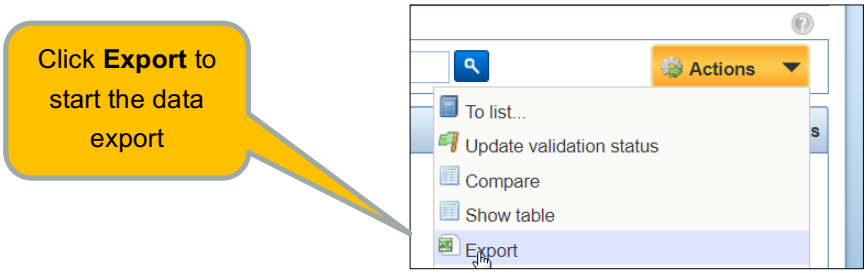
Results 1-8/8

Timestamp	User	Type	Attribute	Old value	New value
04/21/2017 11:43:27 AM	ta	Update	Data Supplement		Add "Trader to Generator shipping details"
04/21/2017 09:48:27 AM	bp1	Update	Data Supplement		Add "BP to Trader shipping info"
04/21/2017 09:39:44 AM	bp1	Update	Transaction Batch		Add "Batch 5"
04/21/2017 09:39:23 AM	bp1	Update	Transaction Batch		Add "Batch 4"
04/21/2017 09:39:01 AM	bp1	Update	Transaction Batch		Add "Batch 3"
04/21/2017 09:38:32 AM	bp1	Update	Transaction Batch		Add "Batch 2"
04/21/2017 09:38:05 AM	bp1	Update	Transaction Batch		Add "Batch 1"
04/21/2017 08:59:40 AM	bp1	Creation			

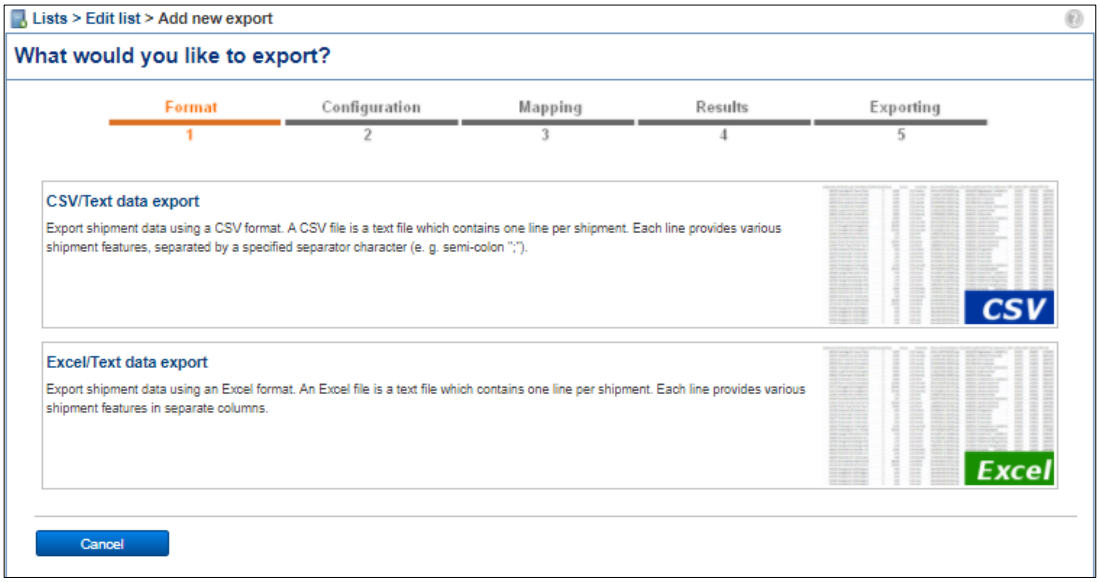
6 Data exporting and Reporting

6.1 Exporting data

All transaction data can be exported to either **csv** or **Excel** (.xlsx) file format. To export transaction data, go to **My transactions,** select the transactions you want to export from the system, or click on **Select all**



Next, click on the file format you want to use for the export file:

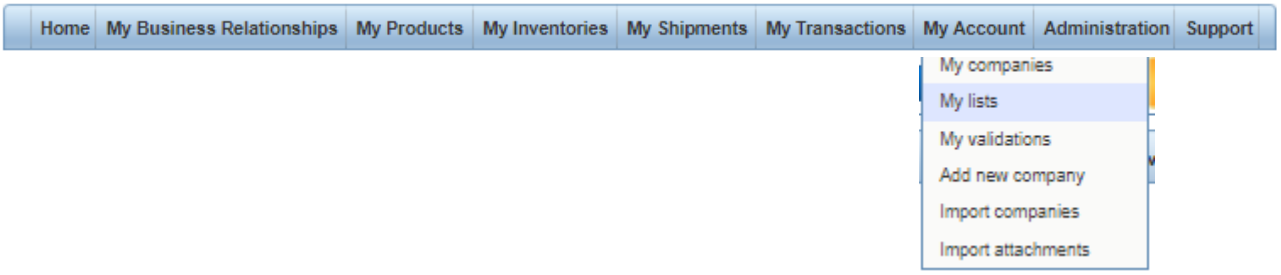


6.2 Standard reports

In addition to **Export** function, some **Standard reports** are available in the system for companies to use. These standard reports include transaction data with predefined filters and features.

To see standard reports, go to **My transactions,** on the left-side menu, scroll down to **Lists** and click on the List name.

Standard reports can also be accessed by clicking on **My lists** under my Account menu.



7 Getting help

Please submit all questions and enquiries regarding the DTS v1.0 to DTS@sbp-cert.org.

With urgent enquiries, please contact Lauri Kärmas +372 58 601 229.