

SBP

Sustainable Biomass Program

Data Transfer System

Version 1.0

Certification Body Guide for verifying DTS use



October 2017

Document history

Published 31 October 2017

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1 Background

The Data Transfer System (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 was mandatory for all SBP Certificate Holders from 1 October 2016 to 31 August 2017.

From 1 September 2017, use of DTS v1.0 became mandatory for all SBP-certified organisations selling biomass with SBP claims to other certified or non-certified organisations. DTS v1.0 can be accessed [here](#).

2 Setting up a DTS CB account

2.1 Accessing DTS v1.0

All SBP-approved Certification Bodies (CBs) received an email invitation to join DTS v1.0 on 1 July 2017. SBP has created user accounts for all SBP-approved Certification Bodies, which means primary SBP contact persons can log in to the DTS and set up additional internal user accounts. A separate registration to the Radix Tree traceability platform is not required.

This is how the initial invitation email to access the system looks:



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>

The screenshot shows the Radix Tree login page. At the top left is the 'GLOBAL TRACEABILITY' logo. On the right is a 'Login' box with fields for 'Username or email' and 'Password', a 'Registration' link, and a 'Forgot password?' link. Below the login box is a navigation bar with a 'Home' button. The main content area features the 'Welcome to RADIX Tree Your traceability tool' heading, a world map with location pins, and a description of the platform. Below this is a box for the 'SBP Sustainable Biomass Program' with a description of the program and its use of the Radix Tree Platform.

2.2 Updating your contact and company information

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

The screenshot shows the user account menu. At the top left is the 'GLOBAL TRACEABILITY' logo. On the right, there are two notification boxes: 'There are currently no activities.' and 'Hello CB Test! Logout'. Below these is a navigation bar with buttons for 'Home', 'My Business Relationships', 'My Transactions', 'My Account', and 'Support'. The 'My Account' button is highlighted, and a dropdown menu is open, listing the following options: 'My profile', 'My companies', 'My lists', 'My validations', 'Add new company', 'Import companies', and 'Import attachments'.

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

My profile

Account information

Required fields are marked as *.

Customer number

User name

E-Mail *

Password *

Password (repeat) *

Language

Personal information

First name

Last name

Phone number

Address

Post code

City

Country

Time zone

(GMT+00:00) Canary

To review and edit your Company specific details, click on **My Account** → **My Companies** and click on your company name. Company details are visible to all organisations linked to your company by a Business Relationship.



There are currently no activities.

Hello Biomass Producer!
[Shortcuts](#) [Logout](#)

Home My Business Relationships My Products My Inventories My Shipments My Transactions My profile tration Support

My companies

My lists

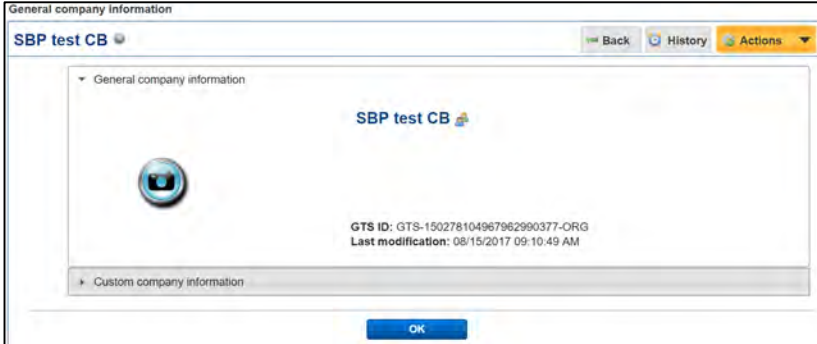
My validations

Add new company

Import companies

Import attachments

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

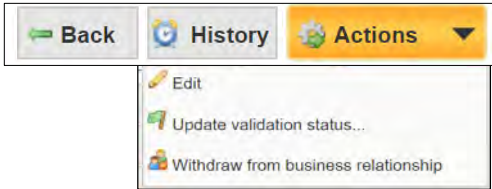


Each section can be expanded by clicking on the name of the section.

General company information includes the company logo and DTS system generated fields (Company ID, Last Modification Date). We recommend uploading the logo for your company.

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

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



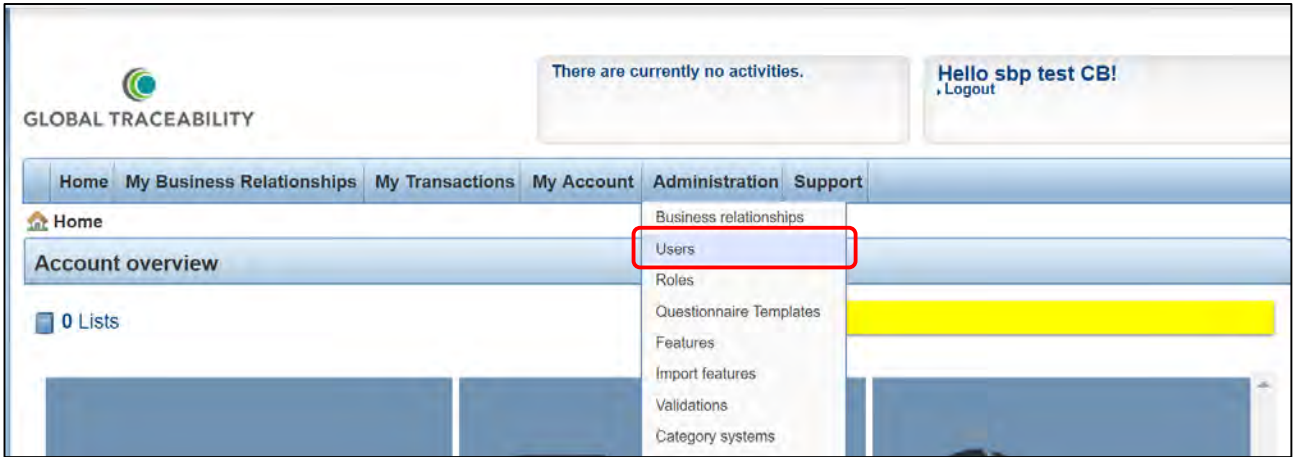
Note: In preview mode, fields without data are not visible. Please enter Edit mode to see the full list of fields.

2.3 Managing and adding internal users

SBP has created one user account for each SBP-approved CB. This is the CB domain admin user, who has permission to establish Business Relationships with all the CB's clients. The CB domain admin user should create additional "Auditor" accounts, which have permission to access client DTS data. Note that the CB domain admin user does not have permission to log in as the client user and extract transaction data from the DTS.

In order to access client DTS data, new user(s) have to be created with a "Master User" account type.

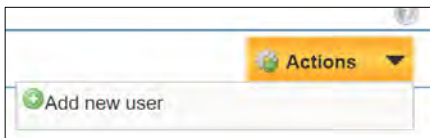
To create new users, the CB domain admin user who received the initial login information, should navigate to **Administration → Users**.



This view shows all current internal DTS users. By default, only one active user, the CB domain admin user is displayed here.



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



CBs have two options to add internal users:

1. Create an internal user account for each SBP auditor (recommended); or
2. Create a general CB user account for all auditors.

Option 1 is recommended as it is possible to deactivate individual DTS users, for example, in cases where an auditor leaves a CB and there is a need to lock access to the DTS. In addition, it is possible to limit auditor access solely to the Business Relationships/clients that they are managing.

Option 2 requires less user administration, but since all auditors will be using the same account it is not possible to limit auditor access to specific Business Relationships/clients and the account password would need to be changed frequently to prevent unauthorised access.

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

The screenshot shows the 'Add new user' form. The 'User information' section includes the following fields: Customer number, User name (marked as required), E-Mail (marked as required), Password (marked as required), Password (repeat) (marked as required), Language (set to English), and Roles (set to Transaction creation role).

Username should be combination of first name initial and last name without space.

A temporary password should be entered. This should be changed by the new user after first login.

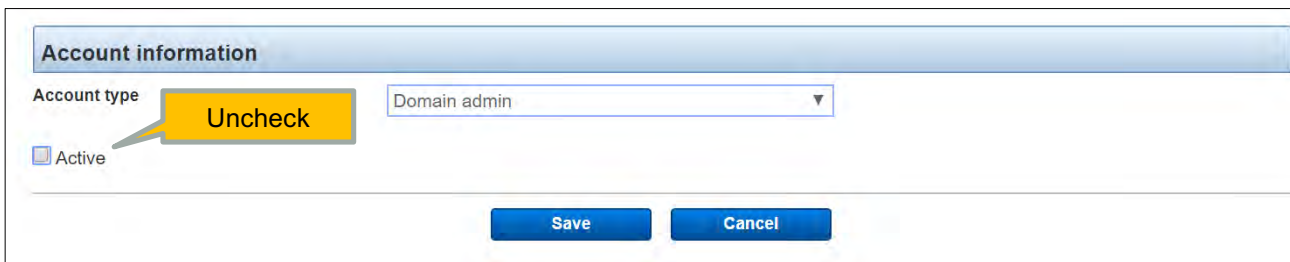
The screenshot shows the 'Personal information' and 'Account information' sections. The 'Personal information' section includes fields for First name (required), Last name (required), Phone number, Address, Post code, City, Country (set to AD (Andorra)), and Time zone (set to Europe, GMT+01:00 Berlin). The 'Account information' section includes an 'Account type' dropdown menu (set to Master user, highlighted with a red box) and an 'Active' checkbox (checked). 'Save' and 'Cancel' buttons are at the bottom.

Please select "Master User" account type. This account has permission to log in to client domains. Domain Admin or Common user account type should not be used.

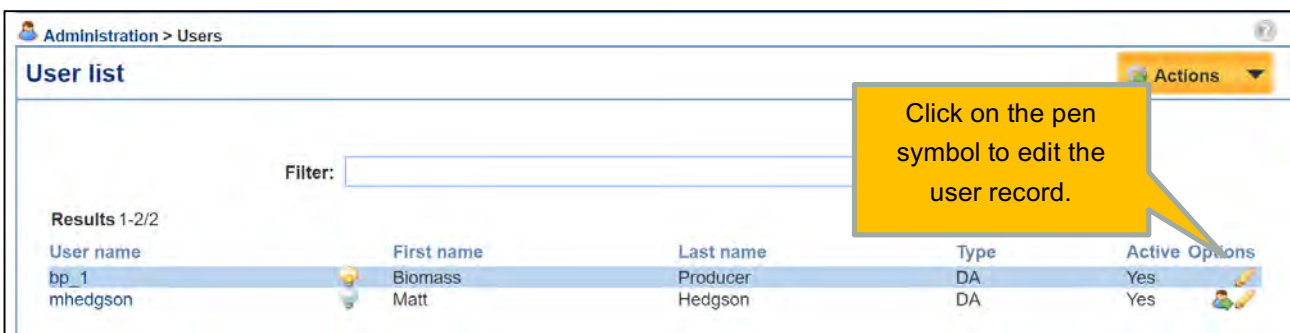
Deactivating an internal user can be done from the same user administration view. To deactivate a user, open the user record by clicking on the **User name**.



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



As described above, it is possible to assign specific Business Relationships/clients to additional internal users. For example, if you want to give specific auditors permission to view and work only on specific Business relationships/clients (not all), then under the “Users list” menu, click on the edit button.



Next, see **Business Relationships** section:

Business relationship information

Business relationship memberships:

- Show and edit business relationship assignments
- Bulk operation Allocate all Un-allocate all

Click on the button to select individual Business Relationships that the current user can view and manage.

Checkmark "Bulk operation" if you want to allocate or un-allocate all Business Relationships to the current user.

3 Business Relationships

A Business Relationship (BR) must be established between a CB and their certified client to access and verify the company’s DTS data.

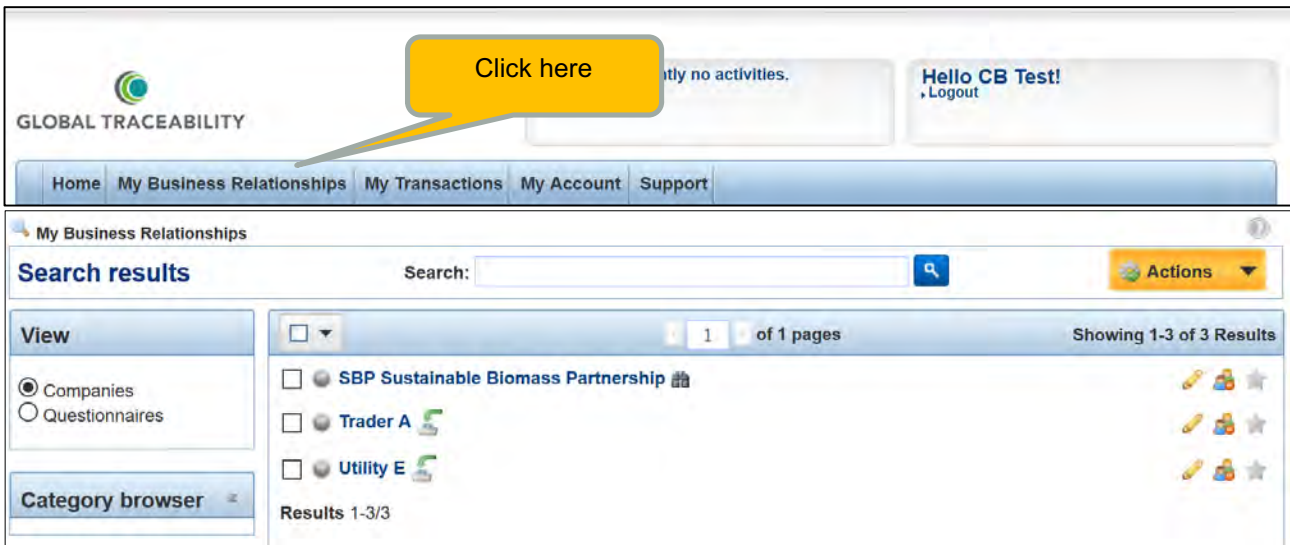
The BR is not created automatically by the system. By default, all certified companies have a BR with SBP only.

Only the CB can send out a BR invitation to connect in the DTS. It is not possible for certified organisations to send a BR invitation to its CB.

By accepting the BR invitation from the CB, the client agrees to give the CB permission to log in to their account and view all details.

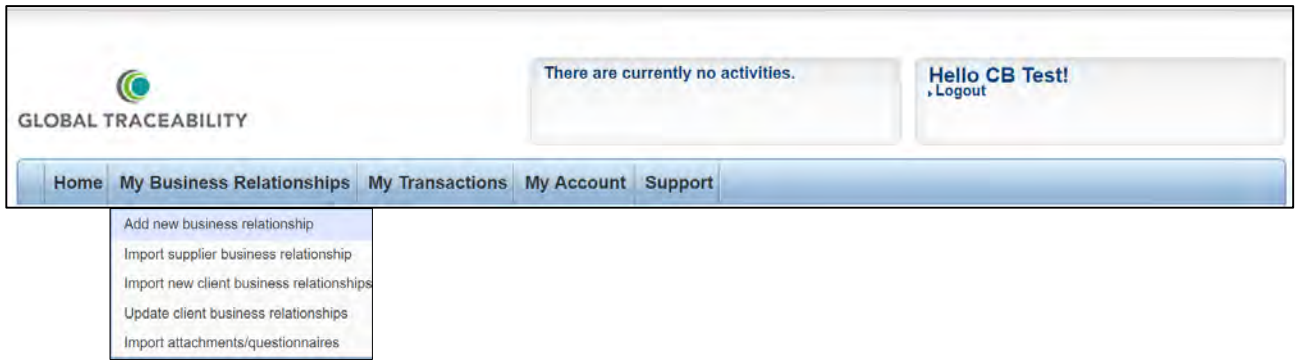
3.1 Overview of all Business Relationships (clients)

It is possible to view all active BRs (certified clients) under **My Business Relationships** menu. All organisations listed here have accepted the BR invitation from their CB and it is possible to access their SBP volume summary.

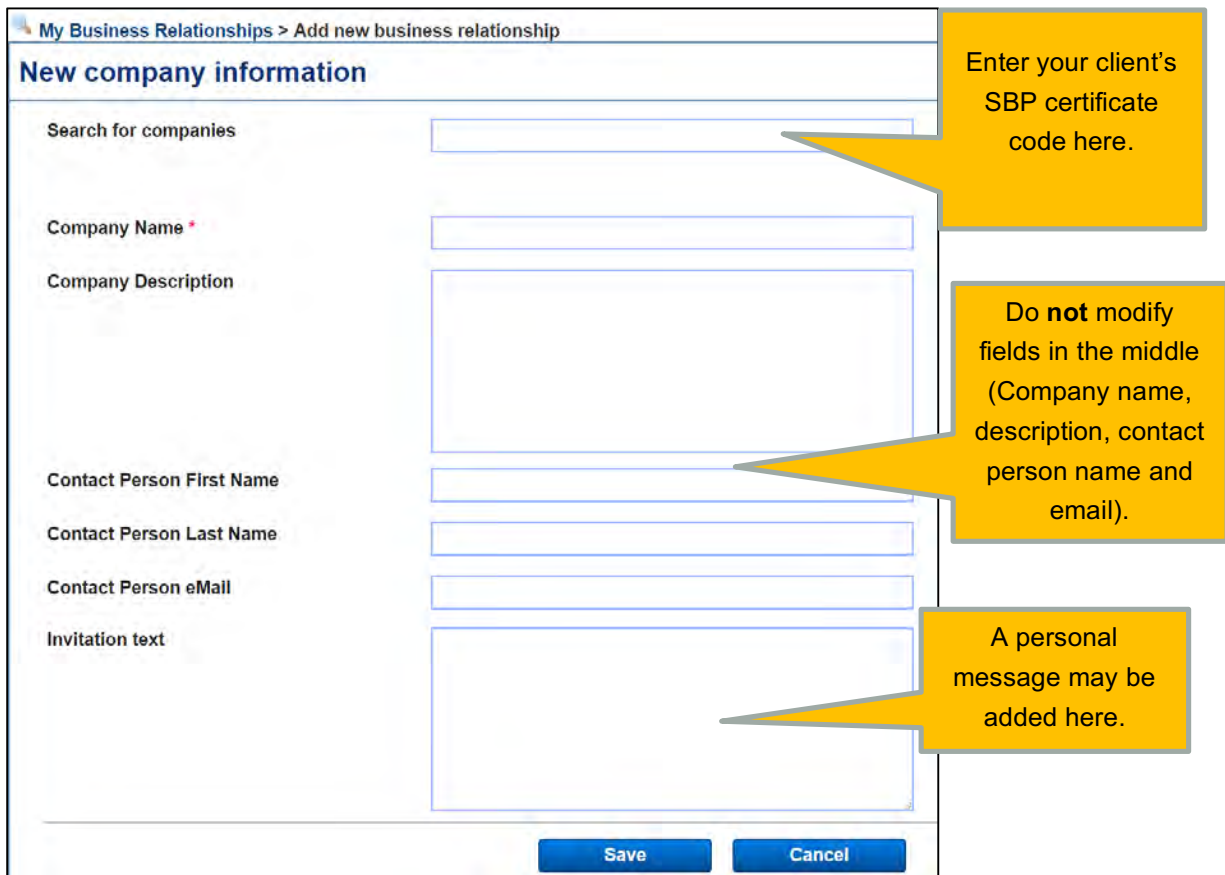


3.2 Adding new Business Relationships (clients)

In order to access and verify data for your client, a BR has to be established. To add a new BR, log in to the system and move the cursor to **My Business Relationships**, then click on **Add new business relationship**.

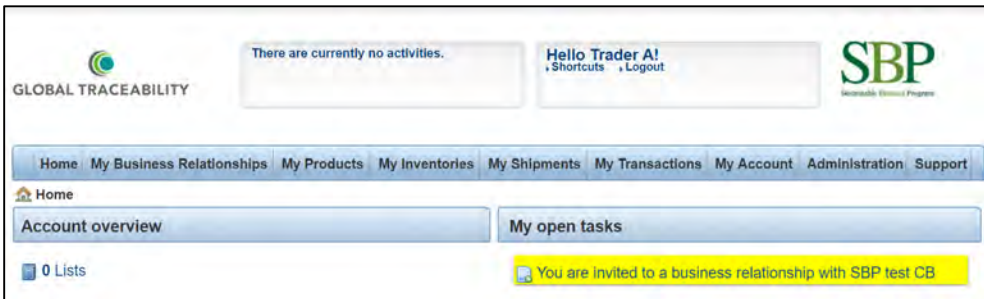


All SBP-certified companies have already been entered on to the system by SBP. This means you can use the search bar to find your clients from the system. Please use your client's SBP Certificate Code in the search bar to find them.

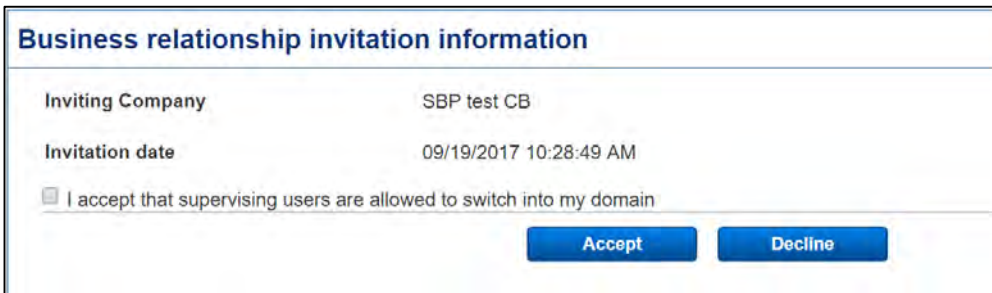


After typing in the client’s SBP certificate code, the system will populate all the other company-specific fields; these should not be changed. You can add your personal invitation text, which will be sent to your business partner together with the invitation.

After sending the invitation to connect, the system sends an automatic email to your client 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. This is how your client sees the invitation:



To accept the invitation, the client has to click on the notification, tickmark the checkbox to agree with the terms and then click accept.



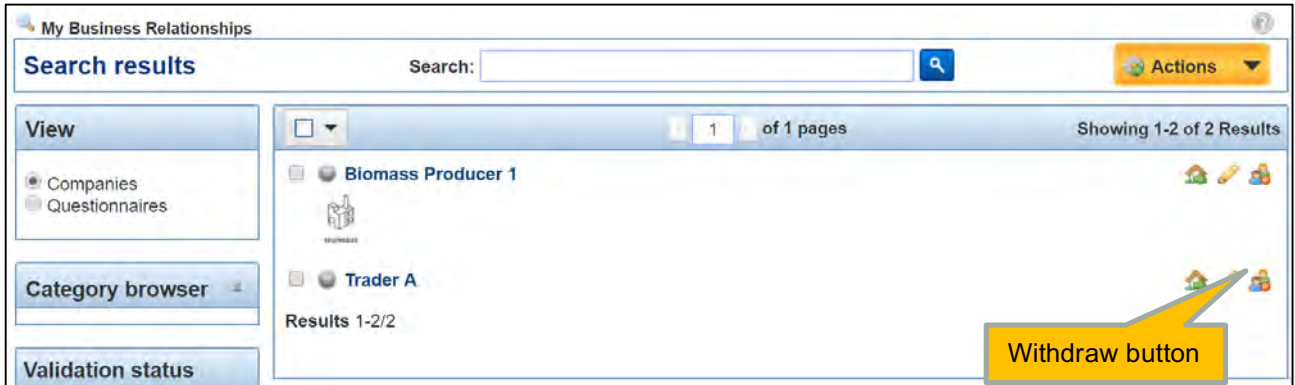
After your client has accepted the invitation, a new company will appear in the **My Business Relationships** menu.

Note: Business Relationships that are not accepted within 28 days will expire and a new BR invitation will need to be sent out.



3.3 Withdrawing from a Business Relationship

At any time, it is possible to **Withdraw** from a BR. Withdrawal can be made from both sides, i.e. from either the CB or the CH account. Once a BR has been withdrawn it is no longer possible for you to access your client's data.



4 Verifying DTS data

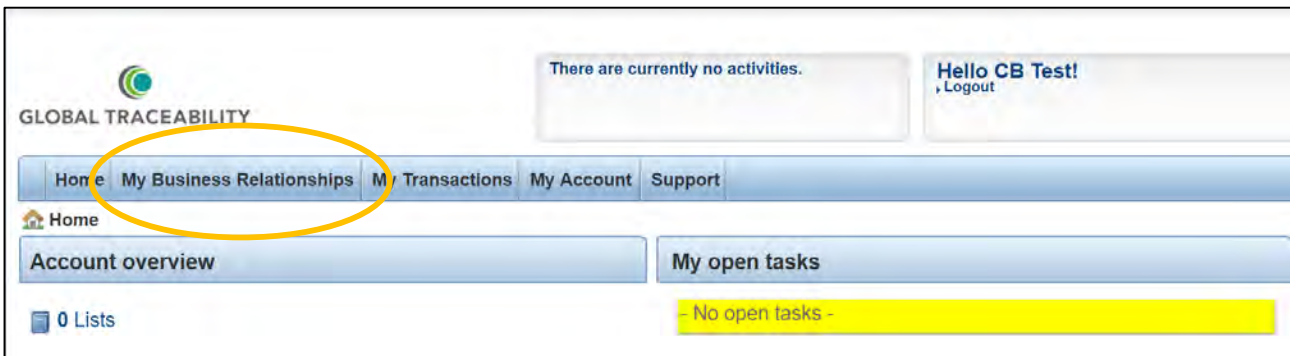
Transactions are the core content of the DTS and they represent received or sold tonnages of biomass with an SBP claim. All SBP-certified organisations are required to create DTS transactions when selling biomass with an SBP-claim to other SBP-certified organisations or to non-certified customers. This includes internal group sales/movements from one certificate holder to another. An SBP claim is only valid when it is registered through the DTS. [SBP Instruction Document 5A Collection and Communication of Data v1.1; p1.1]

This manual does not describe the creation and sharing of transactions, please refer to the [Certificate Holder guide](#).

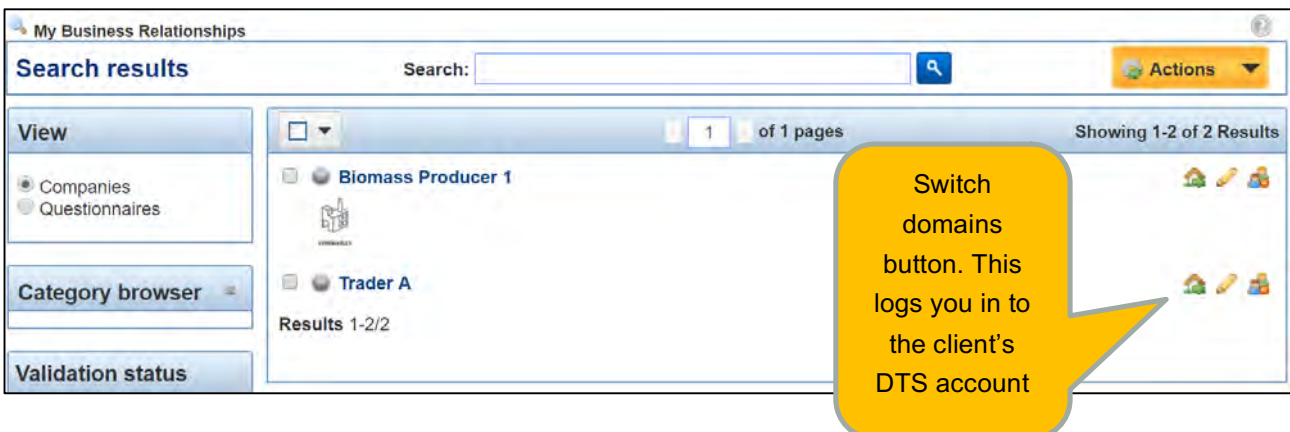
4.1 Accessing Certificate Holder’s DTS account

The CB’s DTS account has supervisory permission, which means that CB auditors are permitted to log in to CH’s DTS accounts to extract their transaction reports. However, a BR between the CB and CH needs to be established first.

To log in to a CH’s account, click on **My Business Relationships**.



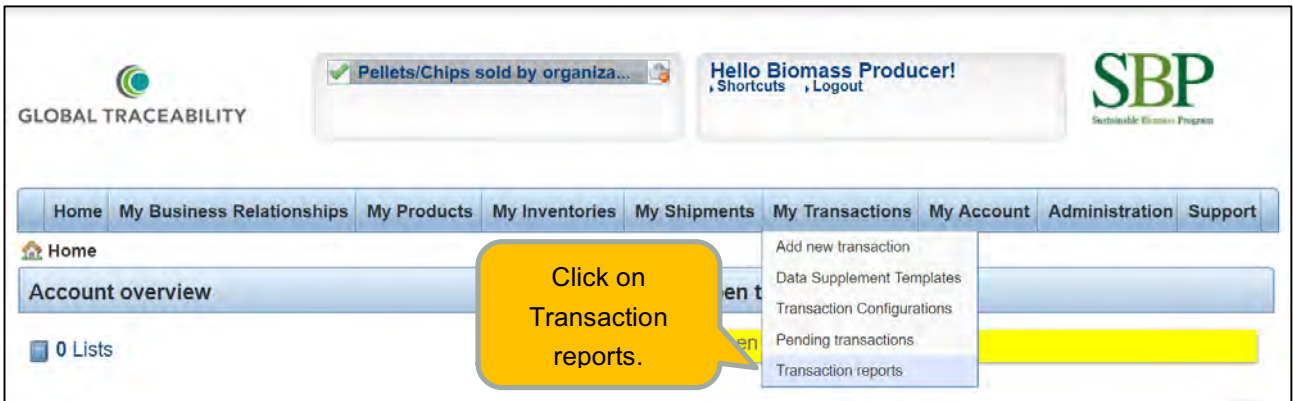
Next, find the CH, whose transaction data you want to verify, from the list and click on the **Switch domains** button.



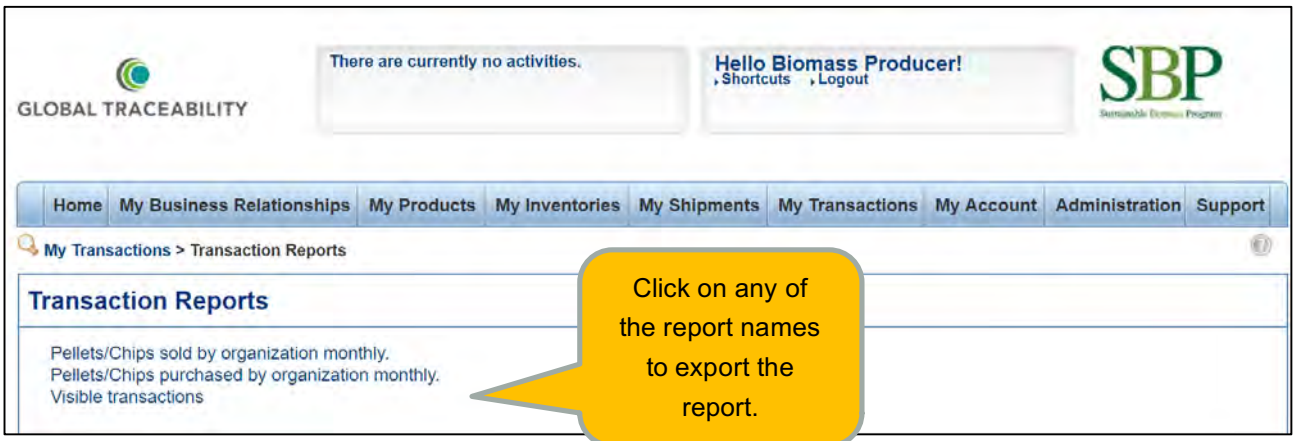
Note: By logging in to the Certificate Holder’s account you gain complete access to the details and functionalities of their account. Logging in to a client’s account should only be undertaken to export their transaction data before an upcoming SBP audit.

4.2 Extracting CHs transaction data

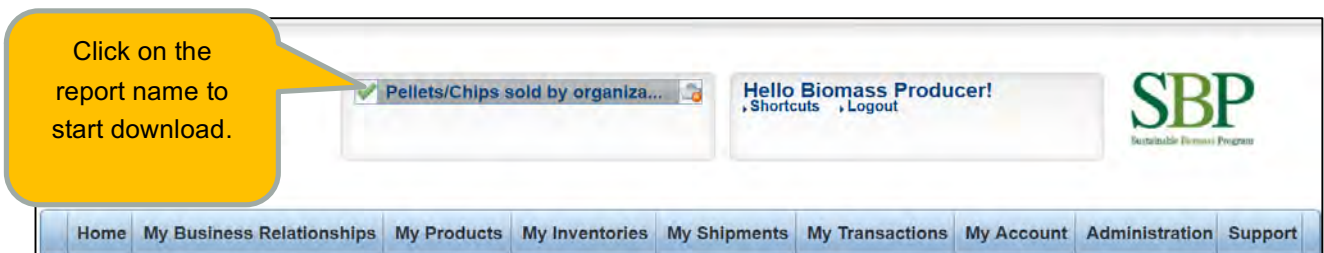
When logged in to CH’s DTS account, navigate to **My Transactions** and **Transaction reports**:



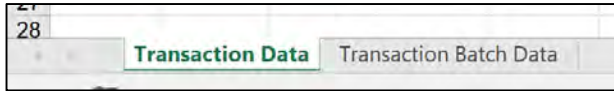
Next, you will see a list of available reports. Note that the list of reports in this document is subject to change.



After clicking on the Transaction report name in the list above, the system generates the report in the background and, once generated, it can be downloaded from the **Activity** list at the top of the page:



Once you have opened the report, you can find two Excel sheets – “**Transaction Data**” and “**Transaction Batch Data**”:



Transaction Data sheet includes all features about the transaction in general (*Transaction GTS-ID, Transaction name, Seller name, SBP certificate code (seller), SBP certificate code (buyer), Buyer name, Transaction status, Transaction date, Certificate transfer date, Total tonnage, Seller reference, Buyer reference, Invoice number, Invoiced tonnage, Number of transaction batches*)

Transaction Batch Data sheet includes all features about the transaction batch (*Transaction GTS-ID, Transaction batch GTS-ID, Transaction batch name, Production batch id, Product type, Tonnage type, Tonnage*)

Transaction and Transaction Batch can be linked by Transaction GTS-ID.

4.3 Tonnage discrepancies

In certain cases, volumes of biomass sold by the first link in the supply chain to the following links in the supply chain can vary. Reasons for discrepancies can be related to measurement differences at the discharge and load ports, damage to the biomass during transportation, changes in moisture content, etc.

NOTE: It is up to the CB to verify the discrepancies and investigate specific reasons during the surveillance audit. Any discrepancy over 5% of the total transaction tonnage shall be reported by the CB to SBP via email to: DTS@sbp-cert.org.

5 Getting help

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

With urgent enquiries, please contact the DTS Manager Lauri Kärmas on +372 58 601 229.