



Guidance Document

# Data Transfer System 2.0

User Guide for Certification Bodies

**Sustainable Biomass Program**  
sbp-cert.org



## Version 1.0

May 2020

For further information on the SBP certification system and to view the full set of documentation see [www.sbp-cert.org](http://www.sbp-cert.org)

This document replaces SBP guidance document:

- Data Transfer System 1.0: Certification Body Guide for Verifying DTS Use v1.0

Data Transfer System 2.0: User Guide for Certification Bodies v1.0 – effective from 01 June 2020

Formal status of document: Active

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### Document history

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In the case of inconsistency between translations, the official English language version shall always take precedence.

SBP welcomes comments and suggestions for changes, revisions and/or clarifications on all of its Standards documentation. Please contact: [info@sbp-cert.org](mailto:info@sbp-cert.org)

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## Background

The SBP 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 (end-users) 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 has been mandatory for all SBP Certificate Holders and Certification Bodies from 1 October 2016.

This user guide is for DTS 2.0 and should be used as guidance for all SBP Certificate Holders and any other stakeholders.

There are two systems in total: Test and Live. The URLs are as follows:

Live	<a href="https://v2.radix-tree.org/">https://v2.radix-tree.org/</a>
Test environment	<a href="#">Click here</a>

Test system account can be activated by contacting [DTS@sbp-cert.org](mailto:DTS@sbp-cert.org).

This manual should be used in connection with the [DTS user guide for SBP Certificate holders](#).

# 1 Setting up a Certification Body account in DTS 2.0

## 1.1 Accessing DTS 2.0

DTS 2.0 can be accessed at <https://v2.radix-tree.org/>. Users of earlier DTS versions are automatically upgraded to DTS 2.0 and can login with their email address. When first accessing the DTS 2.0, all users are asked to set new password for their accounts.

Each CB has a primary SBP contact person, who is also the system administrator in the DTS with the permission set to add/remove other CB users.

After the new DTS user account has been registered by the CB admin user, the user will receive similar email from 'support':

**Dear Jane Smith**

Thank you for registering with RADIX Tree. To activate your account for RADIX Tree click the link below.

[Click here to activate your account](#)

If the link above is not displayed or does not work, copy and paste the link below to the address bar of your browser.

<https://agqkhc0kn.accounts.ondemand.com/ids/activation?token=118D2E802AB8A1999AA7B7C4CACF9A2E0E11C8F6E8273406C95B7886C6BF461C1E3798F195AEE93328BD568D3C1E0C8A6471>

Bookmark the following link to remember your login details.

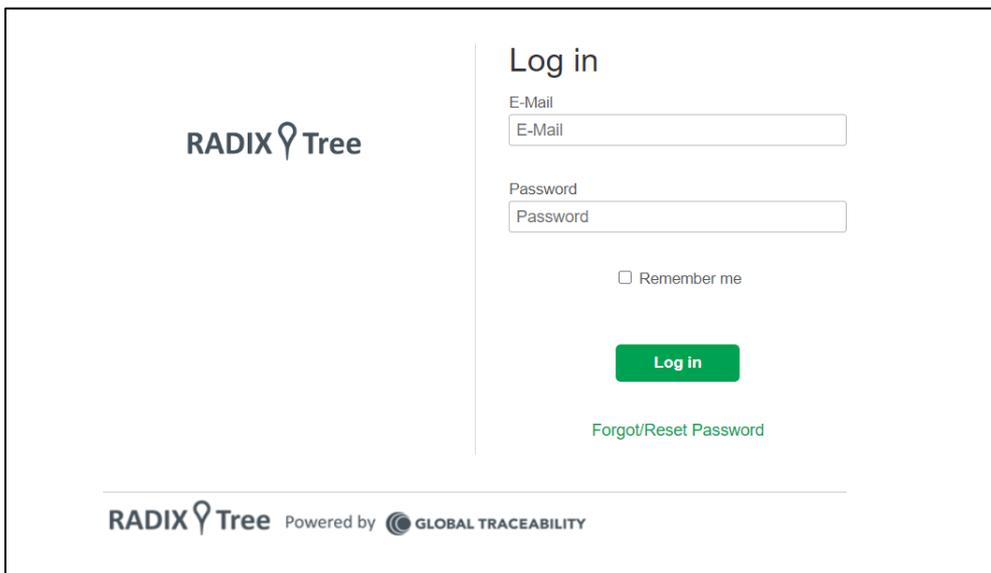
<https://gtsdemo-xb38f78280.dispatcher.hana.ondemand.com/#/home/login>

Best Regards,  
The RADIX Tree Team

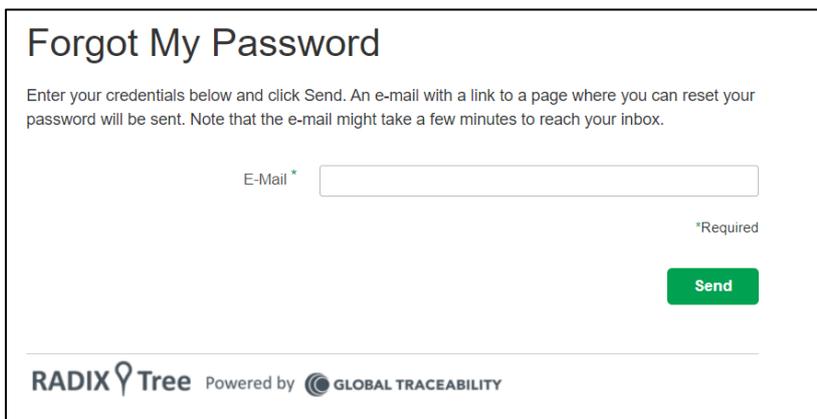
This e-mail may contain trade secrets or privileged, undisclosed, or otherwise confidential information. If you have received this e-mail in error, you are hereby notified that any review, copying, or distribution of it is strictly prohibited. Please inform us immediately and destroy the original transmittal. Thank you for your cooperation.

Please click on the green button to activate your account and set your password for DTS 2.0.

After setting up the password, the user is redirected to the login page.



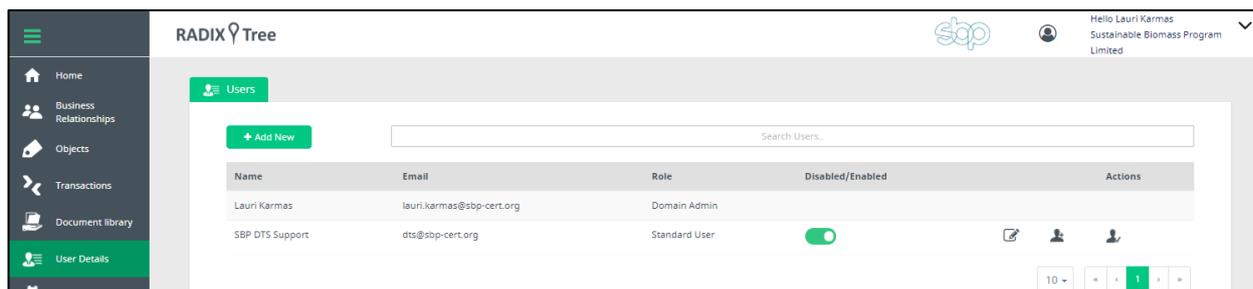
In case you have forgotten your password, you can use 'Forgot/Reset Password' button:



## 1.2 Managing internal CB users/auditor DTS accounts

User management is only available for the CB admin users. It is the task of the CB admin user to maintain the list of CB user accounts in the DTS. Each SBP auditor should have a separate DTS user account with the role of 'Standard user'.

To access user management menu, click on the 'User Details' menu.



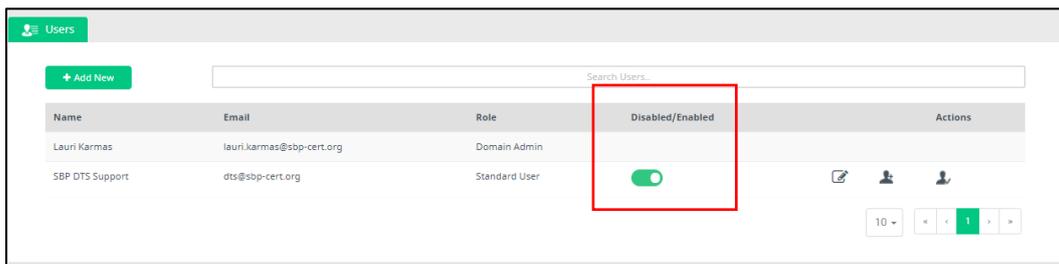
This menu displays all active and inactive users for your organisation.

**To add a new user**, click on the “+Add New” button and enter the details as prompted. After submitting the form, an email is sent to the email address inviting the person to activate their account.

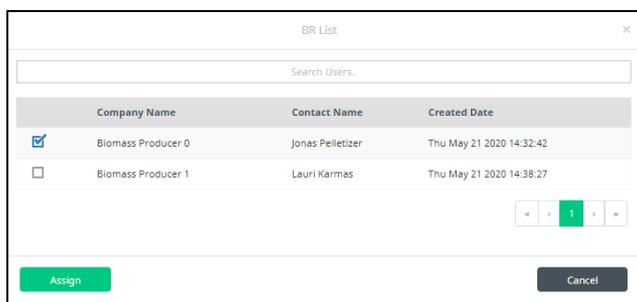
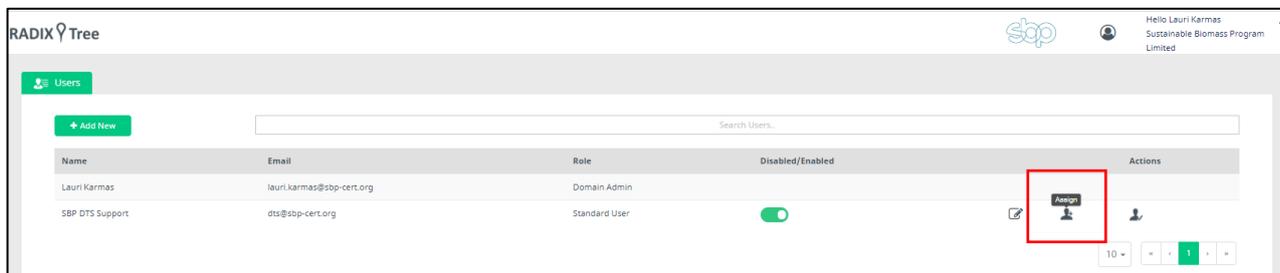
The **Role** of the user defines the permissions that the user has in the DTS. The system allows you to create different users within the same company with different permissions. Each user can be defined as either a Domain Administrator or a Standard User.

- **Domain Administrator** can manage users and Business Relationships, but do not have the functionality to 'switch' to SBP client domains.
- **Standard Users** are able to switch to SBP client domains for data verification purposes, but cannot add/remove users.

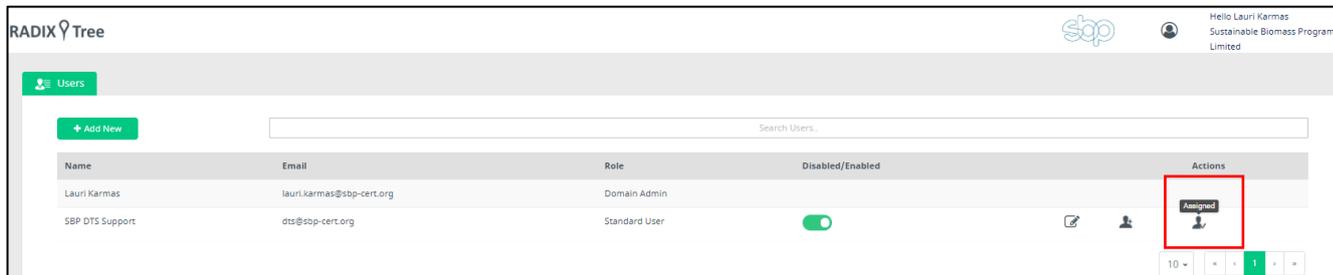
**Deactivating an internal user** can be done from the same 'User Profile' menu. To deactivate a user, simply 'Disable' the user from the list view. The system asks for your confirmation before deactivation. Users cannot be deleted, only deactivated. This is because the system logs the history of the actions of every individual user. If it becomes necessary to activate the user again, the Domain Administrator can simply reactivate or enable the account.



**The Domain administrator needs to assign Business Relationships to 'Standard user' profile before the new user can access any of the Business Relationships. By default all new users accounts with 'standard user' profile are not assigned to any Business Relationships.** It is possible to assign only specific Business Relationships/SBP clients to the auditor accounts. For example, if you want to give specific auditors permissions to only view and work only specific Business relationships/SBP clients (not all), then click on the 'Assign' button to select the Business Relationships that the user should have access to:



To view already assigned users, click on the 'Assigned' button:



The screenshot shows the RADIX Tree Users management interface. At the top, there is a header with the RADIX Tree logo, the sbp logo, and a user profile for Lauri Karmas. Below the header, there is a 'Users' section with an '+ Add New' button and a search bar. A table lists the following users:

Name	Email	Role	Disabled/Enabled	Actions
Lauri Karmas	lauri.karmas@sbp-cert.org	Domain Admin		Assigned
SBP DTS Support	dts@sbp-cert.org	Standard User	<input checked="" type="checkbox"/>	

The 'Assigned' button in the Actions column for Lauri Karmas is highlighted with a red box. At the bottom right of the table, there are pagination controls showing '10' and navigation arrows.

## 2 Business Relationships

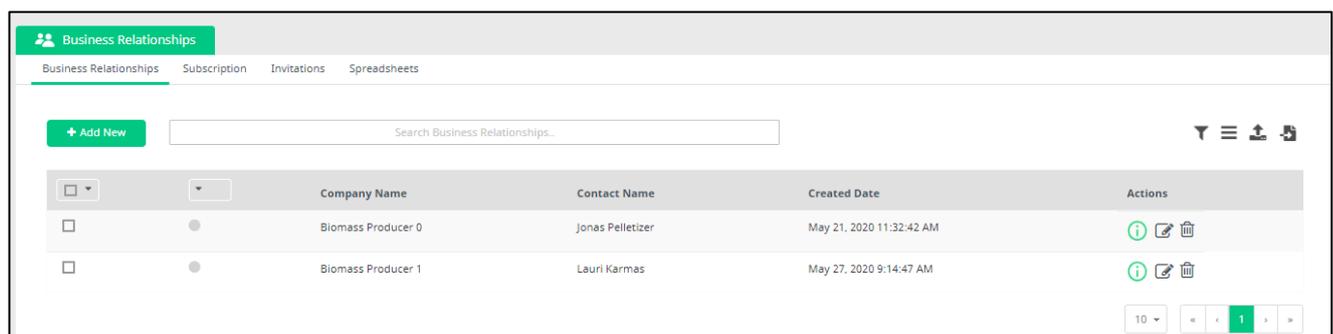
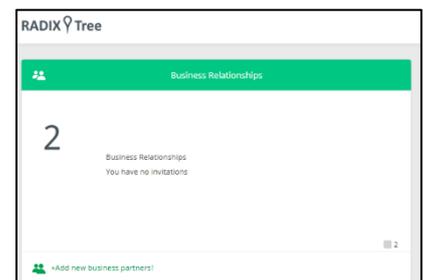
**A Business Relationship (BR) must be established between a CB and their certified client, to access and verify company’s DTS data.**

Business Relationship between the Certificate Holder and its Certification Body must be established by the Certification Body.

### 2.1 Overview of Business Relationships

After logging in to the DTS, the homepage shows you the total number of the Business Relationship that you are connected to or that your account is assigned to. Clicking on the tile will open the detailed Business Relationship view.

To see details about specific Business Relationship, click either on the company name or on the green information button .



### 2.2 Adding new Business Relationships

To add a new Business Relationship, click on the “+Add New” button and search for your SBP client from the ‘Search Companies’ field. **Search by SBP certificate code is the preferred method to connect with your SBP client.** This ensures that you are sending the invitation to the correct SBP Certificate Holder. After typing in the company name or 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, via email, to your SBP client.

Your customer needs to accept the Business Relationship invitation before the company is added to the Business Relationships list.

### 3 Accessing Certificate Holder account

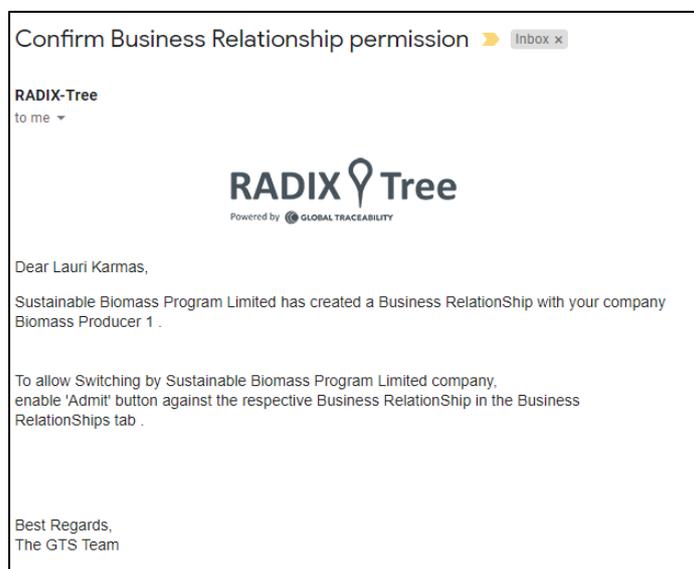
To be able to switch to SBP client's account for transaction verification purposes, the following criteria have to be met:

- Business Relationship between the CB and the Certificate Holder (CH) has been established (see 2.2 above)
- User trying to access the CH account is assigned to 'Standard user' role (see 1.2 above)
- The Business Relationship is assigned by the Domain administrator to the user (see 1.2 above)
- The Certificate Holder has enabled "Admit" function for the CB (see below)

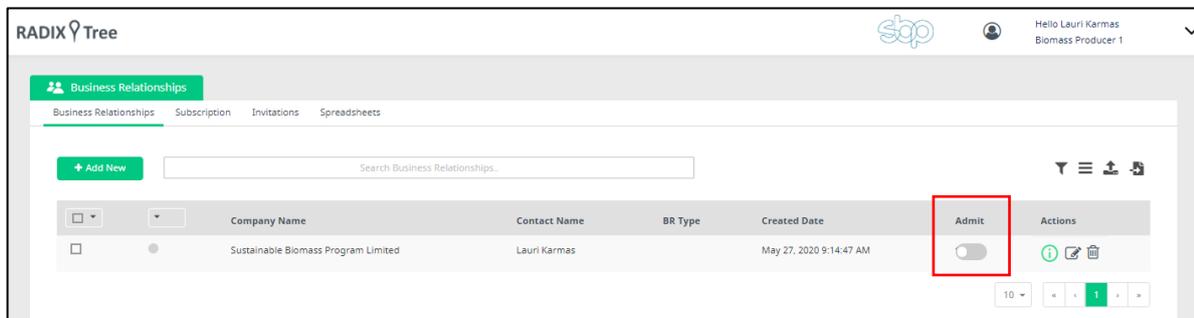
#### 3.1 Certificate Holder 'Admit' (allow switching) function

Certificate Holders can enable or disable supervisory accounts (SBP/CBs) to switch to their accounts. This means that even with the Business Relationship between the CB and the CH established, the certified company needs to enable this permission for the CB. By default, after creation of the Business Relationship, this function is disabled.

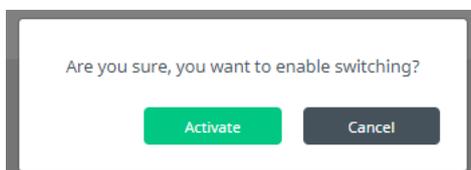
After a new Business Relationship is created between the CB and the CH, the CH will receive an email notification to check this setting:



To enable this 'Admit' function, the Certificate Holder should go to Business Relationships overview and enable it:



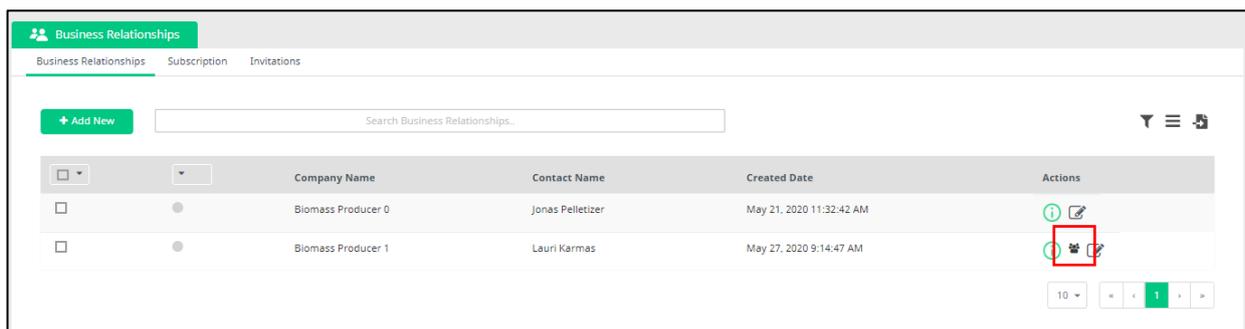
Clicking the enable button will show a confirmation window, where it can be activated:



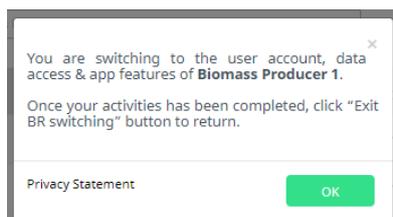
Note: 'Admit' function is only available between the supervisory account (CB, SBP) and the certificate holder account.

### 3.2 Switching to SBP Certificate Holder account

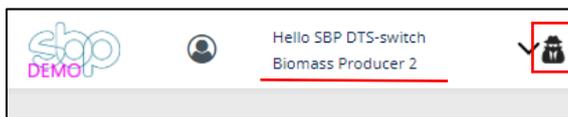
To switch to SBP certificate Holder account, open the Business Relationship overview page and click on the 'Switch BR - ' button. In the screenshot below, 'Biomass Producer 1' has enabled 'Admit' function, but 'Biomass Producer 0' has not enabled it. If this is enabled, the CB user can see an additional button under the Actions column:



Clicking the 'Switch BR' button displays a warning message with a privacy statement:



After clicking 'OK', you are switched to the Certificate Holder's account. You can see that you are switched to another account from the right bottom corner – it includes your name and the name of the company you are switched to. In addition there is an '👤' icon displayed.



To switch back to your own account, click on the '👤' icon.

Note that all activities that a CB user conducts under the certificate holder account are being logged under the Activity History. This includes also the login/switch to the CH account:



## 4 Verification of Certificate Holder DTS data

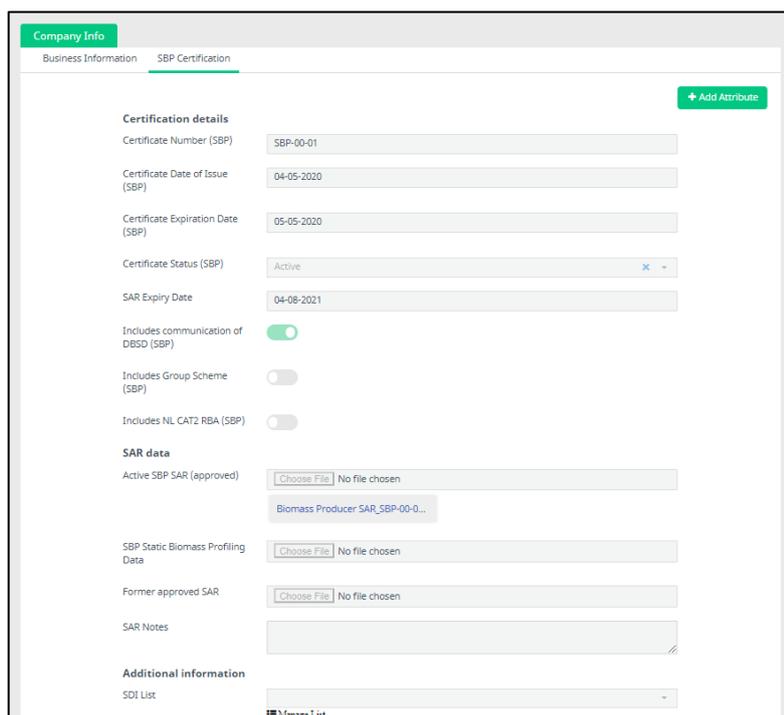
Transactions are the core content of the DTS and they represent received or sold tonnages of biomass with an SBP claim. All SBP certified organisations are required to create DTS transactions when selling biomass with an SBP-claim, to other SBP-certified organisations or to non-SBP certified customers. 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.

This manual does not describe the creation and sharing of the transactions, please refer to the [DTS 2.0 User Guide for the Certificate Holders](#).

### 4.1 Reviewing SBP certificate information

To check the SBP certificate Holder's company profile, including SBP-certificate data (scope, SAR documents, SDI lists, etc), click on the company name and then select "Edit company profile".

Next, a company info pages show up. Click on 'SBP Certification' section to review certification details and the uploaded SAR document and SDI list. This section is managed by SBP and is read only for the company.



**Company Info**

Business Information | **SBP Certification** | [+ Add Attribute](#)

**Certification details**

Certificate Number (SBP): SBP-00-01

Certificate Date of Issue (SBP): 04-05-2020

Certificate Expiration Date (SBP): 05-05-2020

Certificate Status (SBP): Active

SAR Expiry Date: 04-08-2021

Includes communication of DBSD (SBP):

Includes Group Scheme (SBP):

Includes NL CAT2 RBA (SBP):

**SAR data**

Active SBP SAR (approved):  No file chosen  
Biomass Producer SAR\_SBP-00-0...

SBP Static Biomass Profiling Data:  No file chosen

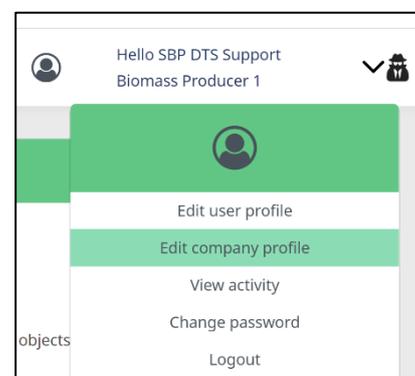
Former approved SAR:  No file chosen

SAR Notes:

**Additional information**

SDI List:

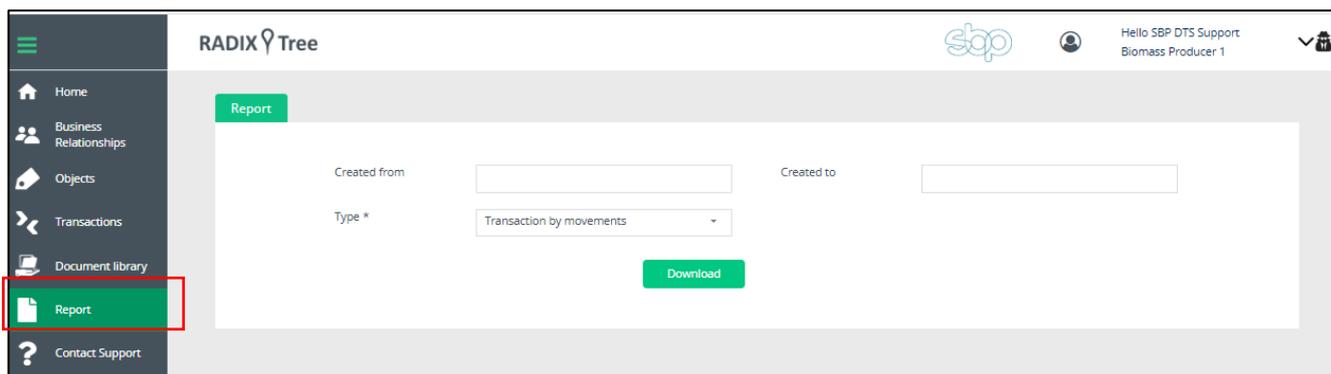
[Manage List](#)



## 4.2 Certificate Holder Transaction data export

### 4.2.1 Transaction reports

To mass export all received and shared transactions, click on the 'Report' menu.



The screenshot shows the RADIX Tree interface. On the left, a navigation menu has the 'Report' option highlighted with a red box. The main area is titled 'Report' and contains the following form elements:

- 'Created from' text label and an empty input field.
- 'Created to' text label and an empty input field.
- 'Type \*' text label and a dropdown menu currently showing 'Transaction by movements'.
- A green 'Download' button.

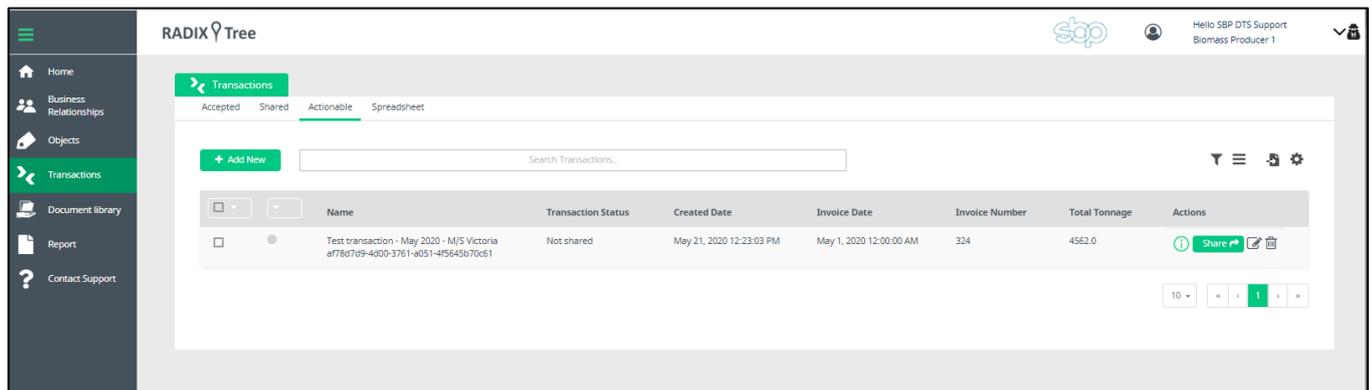
Here you can specify the period of transactions: enter the 'Transaction created from' date and 'Transactions created to' date to add a time limit to the report. When left blank, you can export all transactions without any time filter. Click download to start the export. Depending on the number of transactions included, it might take few minutes to download the report. Please stay on the page until the download has started.

The export is in .xls format file, that includes following worksheets:

- Incoming transactions – includes all transaction accepted by the company
- Outgoing transactions – includes all transactions shared by the company
- Transaction Batch Data – includes batch data (can be linked with transaction by transaction IDs)
- Data Supplement Data – includes data from DBSD forms or any other object related to the transaction.

## 4.2.2 Transactions list view

To review the transactions individually, open the “Transactions menu”.



Here you can filter the transactions by the following:

- **Accepted** – includes all transactions accepted by the company. This view can include also Consumed and Archived transactions.
- **Shared** – includes all transactions that the company has shared to other companies (includes transactions sold to non-SBP certificate holders). This includes transactions that are shared, but not accepted yet.
- **Actionable** – includes transactions, where the company needs to take further action: either accept (incoming pending transactions), share (created transactions that are not yet shared or rejected transactions that need amending).

To view details about the specific transaction, click on the transaction name or on the green information button. The transaction opens and you can see detailed information about it. The first section of the transaction includes system fields that update itself after the transaction status changes.

<b>Name</b>	: Test Transaction - May 2020 - M/S Victoria	<b>Status</b>	: Accepted
<b>Sharing Company</b>	: Biomass Producer 3	<b>Created Date</b>	: May 18, 2020
<b>Receiving Company</b>	: Biomass Producer 4	<b>Sending Date</b>	: May 27, 2020
		<b>Accepted Date</b>	: May 27, 2020

The next section of the transaction includes seller and buyer information and invoice-specific information:

Transaction details :	
Name	Value
Description	
SBP certificate code (seller)	SBP-00-03
SBP certificate code (buyer)	SBP-00-04
Invoice Date	May 5, 2020
Invoice Number	INV-09012
Invoiced Tonnage	5637
Transaction Reference	TR-REF 3242
Total Tonnage	2341

Lastly, the objects related to the transaction are listed. This includes in minimum at least one transaction batch, but may also include DBSD forms, SREG forms or documents.

Object Name	Templates	Created Date
Batch 1	Transaction Batch	May 27, 2020 12:58:09 PM
SREg from factory to harbour	SBP SREG Inland Transport	May 27, 2020 12:59:00 PM
DBSD 1	DBSD v1.3	May 27, 2020 1:00:18 PM

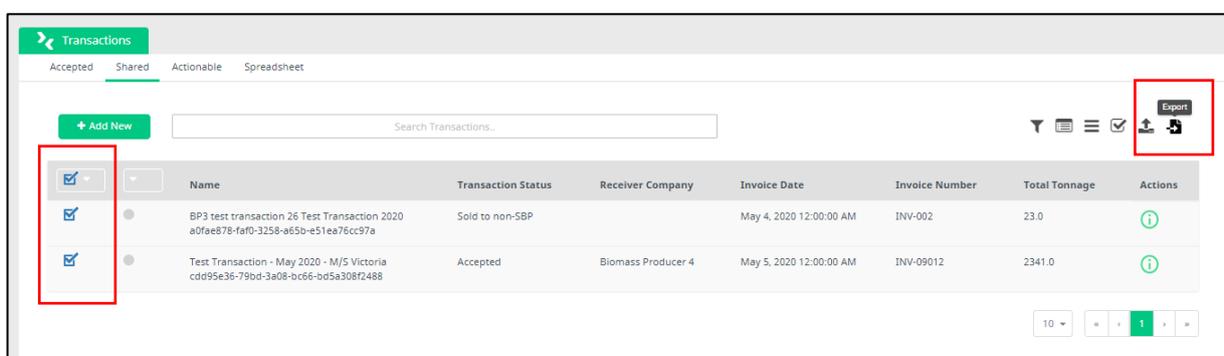
To view details of the transaction object, click on the object name or on the green information button:

The screenshot shows three overlapping 'Data Info' windows. The top-left window displays details for 'Batch 1', including fields like 'Old GTS transaction ID', 'Transaction batch description', 'SDI List', 'AA-code', 'Product Type', 'Production Batch ID', 'Tonnage', 'SBP Claim Type', and 'Batch Type'. The top-right window shows details for 'SREg from factory to harbour', including 'SREG Start location', 'Port of Muuga, Estonia', 'road', 'bio-diesel', '213 km', 'Actual', '32 mt', '45', 'true', and a 'Large String' field. The bottom window shows details for 'DBSD 1', including 'Production Batch ID', 'Biomass tonnage (t)', 'Biomass Category', 'Market Specific Status', 'NTA 8003 level 3 code', 'Country of Origin of the Feedstock', 'Feedstock Certification System', 'Feedstock certification system claim', 'Feedstock is sourced by using SBP ID2D (Group Scheme)', 'Feedstock is sourced by using SBP ID2E (SDE+ Category 2)', 'Other (optional)', and 'Flanders compliant stemwood excluding the share corresponding to'.

In case the company has accepted a transaction from their supplier and then reshared it, the incoming transaction is under the “Accepted” view and the re-shared transaction is under “Shared” view – when resharing, the system clones the incoming transaction and gives the cloned transaction a new unique ID. Reshare of the incoming transaction is only available once – after resharing it cannot be reshared again. In case company has accepted a transaction from their supplier and the sold it further to non-SBP certificate holder, the process is the same – system clones the incoming transaction and creates a duplicate to the “Shared” list. When resharing incoming transactions, the companies can update invoice specific details and add SREG forms or transaction documents, but it is not possible to edit or add transaction batch data.

### 4.2.3 Transactions list view export

It is possible to export transactions directly from the transactions list view. To export the data from the list view, select the transactions you want to export and click ‘Export’ button:



The export file include following worksheets:

- Transaction master (ID, Name, Status, Created Date, Creator company and user)
- Transaction (invoice details)
- Transaction Batch (batch data – SBP claim, tonnage, PB ID, etc)

Depending on the objects attached to the transaction, following worksheets may appear:

- SREG – containing aggregated SREG data
- DBSD – containing aggregated DBSD form data
- Transaction Documents

## 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 discharge and load port, 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.

In the DTS, there are two options how traders can share transactions – either through direct sharing of transactions or by ‘Archiving’ incoming transactions and creating a new transaction and adding transaction data from Biomass Producer(s) manually. See also 4.7 – Direct trading of transaction/biomass and 4.8 Trading biomass (combining/splitting transactions) in the SBP 2.0 User Guide for Certificate Holders.

## 5 Support

Please submit all questions and enquiries regarding the DTS 2.0 to [DTS@sbp-cert.org](mailto:DTS@sbp-cert.org).

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