



Guidance Document

# Data Transfer System 2.0

## User Guide

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



## Version 1.0

### 25 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)

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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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# 1 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 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>  |

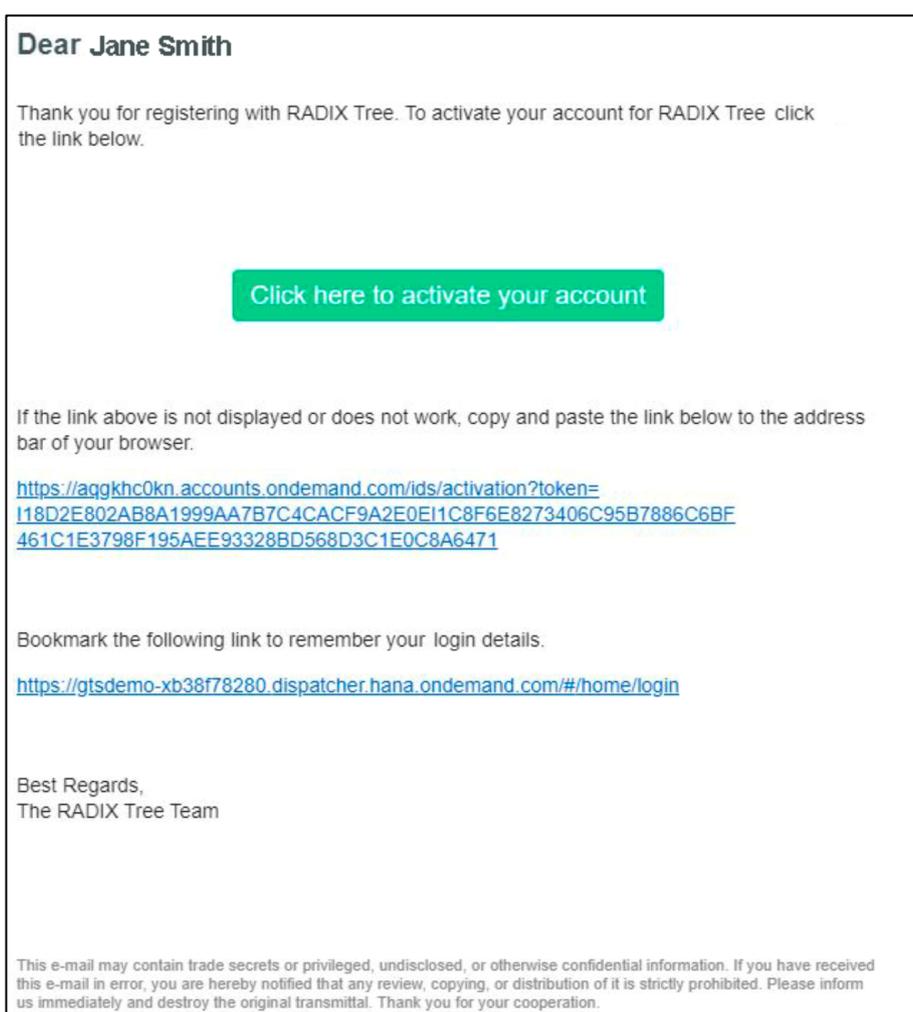
## 2 Getting Started with the DTS 2.0

### 2.1 Accessing DTS 2.0

DTS 2.0 can be accessed at <https://v2.radix-tree.org/>. All SBP Certificate Holders receive an invitation to the platform after the issuance of their certificate by their Certification Body. Access to the system is granted directly by SBP.

All existing DTS 1.0 users are automatically upgraded to DTS 2.0. After the upgrade is complete, existing users will receive an email notification inviting them to log in to the updated system. All users will need to set a new password for their account when they log in to the DTS 2.0 for the first time.

After the DTS account has been registered by SBP, the user will receive the following email from 'support':



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

After setting up your password, you are redirected to the login page.

## Radix Tree - Integration

### Log in

E-Mail

Password

Remember me

[Log in](#)

[Forgot/Reset Password](#)

---


Powered by


**Note:** DTS 2.0 login works only with e-mail address (not usernames). One email can be used to log in to the system and manage multiple SBP-certificates. Example: one person is managing five SBP-certificates and the email address of this person is set for all the users of these Certificate Holders. In this scenario, the system asks the person to choose a company to represent after the login:

### Choose a Company

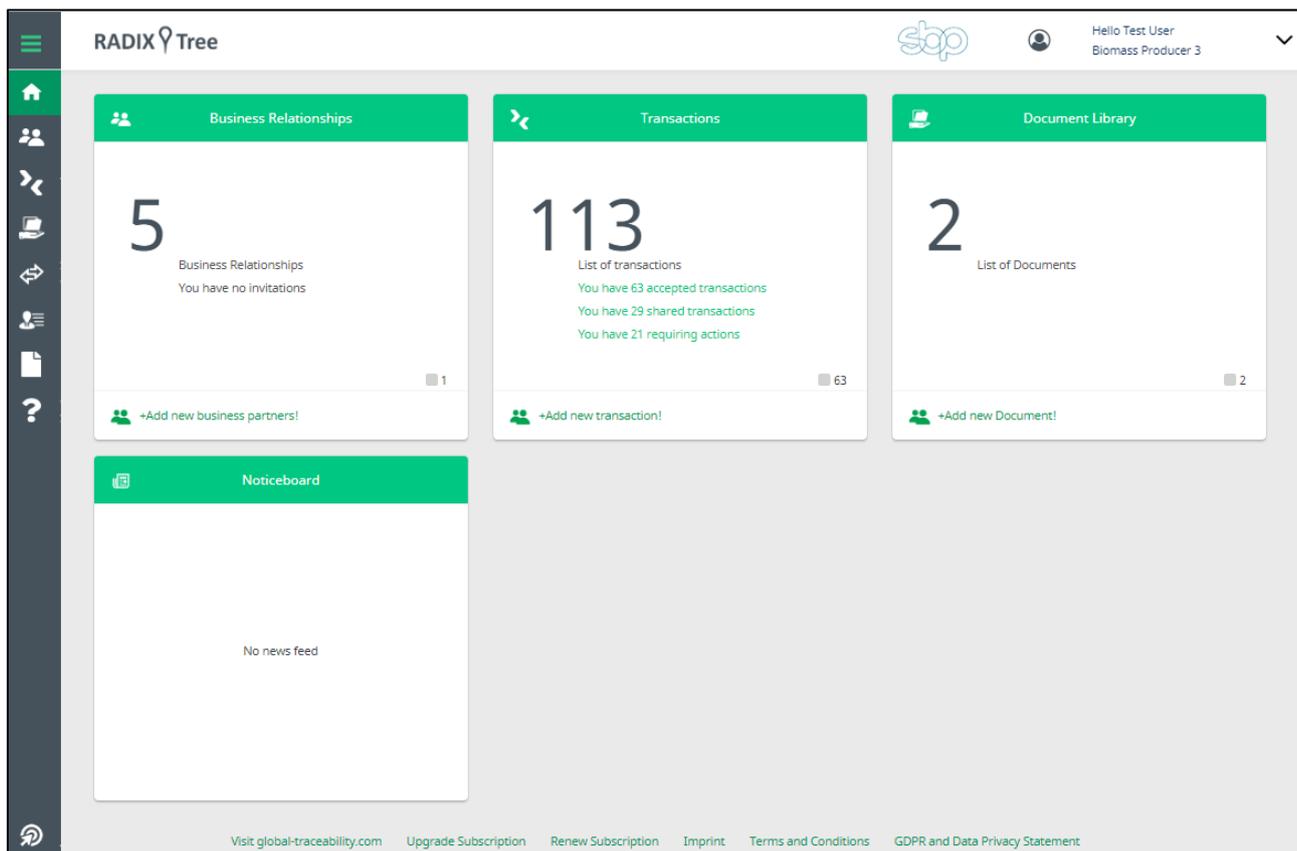
|  |  |  |  |
|--|--|--|--|
| Biomass Producer 2<br><input type="button" value="Proceed"/> | Biomass Producer 3<br><input type="button" value="Proceed"/> | Biomass Producer 4<br><input type="button" value="Proceed"/> | Biomass Producer 1<br><input type="button" value="Proceed"/> |
| Utility E<br><input type="button" value="Proceed"/>          |  |  |  |

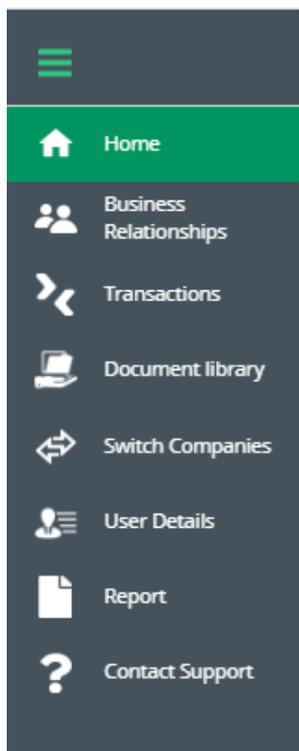
Please contact [DTS@sbp-cert.org](mailto:DTS@sbp-cert.org) if you need any assistance to set up the user(s) to manage multiple certificates or if you have not received an email invitation.

Access to DTS 1.0 will be restricted once users have been upgraded to DTS 2.0.

## 2.2 Home page layout and menu items

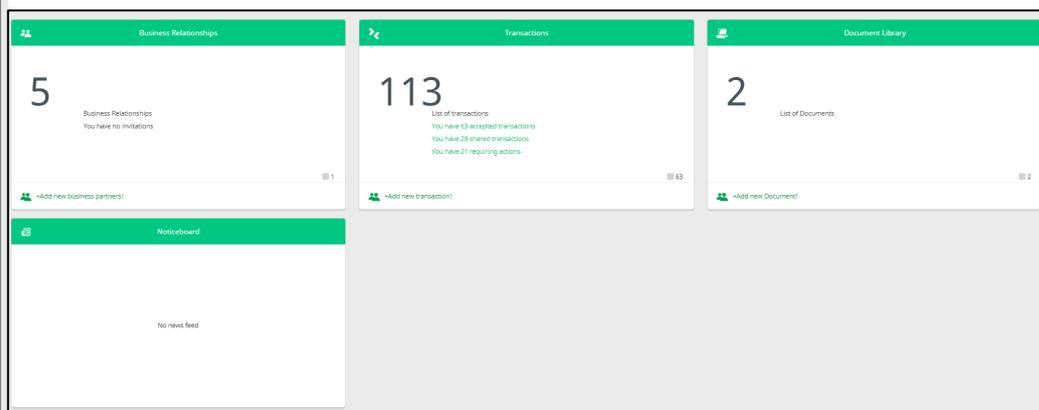
The Home page layout has gone through a significant upgrade and only includes SBP-relevant menus and data.





The main menu is located on the left side and can be expanded or collapsed by clicking on the button with three green stripes.

Key information/data is displayed in tiles in the centre of the page, each giving a basic summary. This includes Business Relationships, Transactions, Documents and Noticeboard.



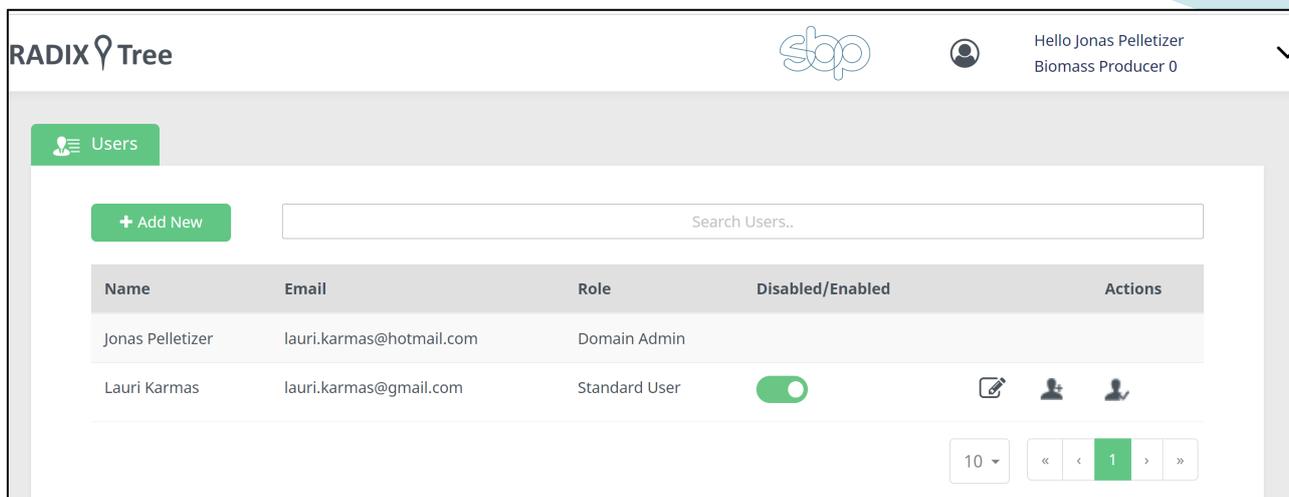
The tiles include shortcut buttons to add new Business Relationships or Transactions. In addition, they display the current count of Business Relationships and Transactions, including any invitations or Transactions requiring users' actions.

## 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.

Note that when one email address is added as a user for multiple companies, then the user can get access to all accounts with one login.

To see an overview of all DTS internal users go to left hand side menu and click on "User Details":

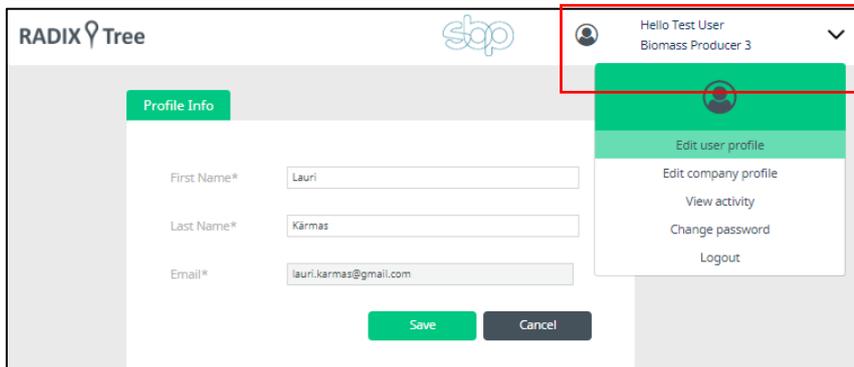


To add a new user, click on the “+Add New” button and enter the details as prompted. After submitting the form, an email is sent to the email address inviting the person to activate their account.

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. The first user registered by the company is automatically nominated as the Domain Administrator. If you need help managing your company’s day to day activities, so you can set up other users. Each user can be defined as either a Domain Administrator or a Standard User. **Domain Administrators** should be limited to persons with authority.

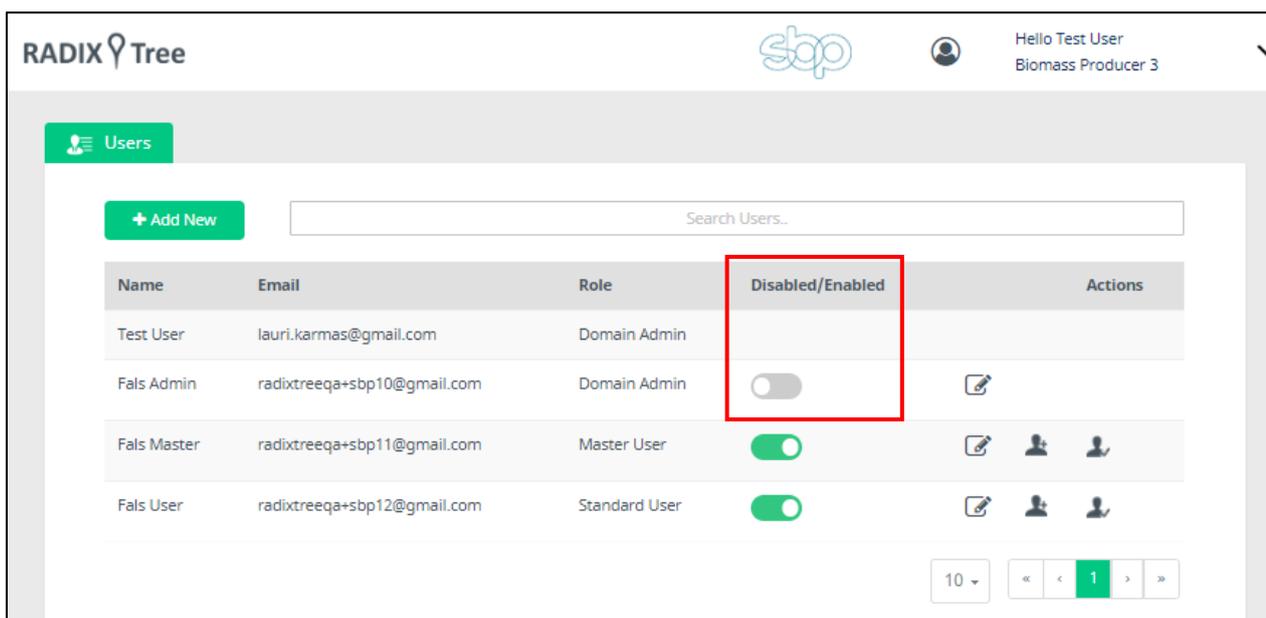
**Standard Users** are able to do the day-to-day tasks, but have following restrictions:

- They cannot create new Business Relationships
- They cannot add new users
- They cannot disable other users



After the user account has been set up, only the Domain Administrator can change the role of the user. Other user details can be changed by the user him/herself. Users can update and edit their own user profile through the profile menu:

**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.



## 3 Business Relationships

In order to receive claims or make claims you must 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. Business Relationship between the Certificate Holder and its Certification Body must be established by the Certification Body.

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 establish a Business Relationship with will be able to see details about your company, including documents uploaded to your company record. Supervisory accounts can also see those details as well as transaction data.

### 3.1 Adding new Business Relationships

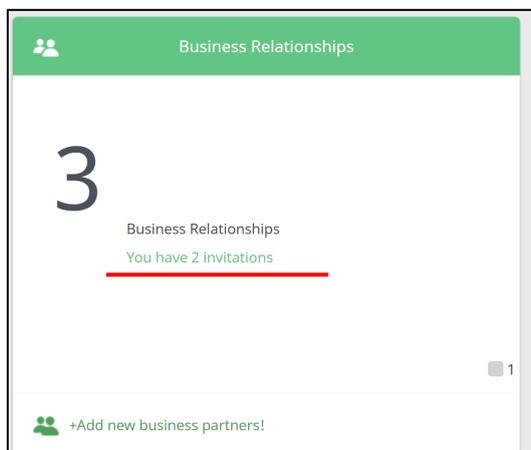
To add a new Business Relationship, click on the “+Add New” button and search for your business partner from the ‘Search Companies’ field. **Search by SBP certificate code is the preferred method to connect with your business partner.** This ensures that you are sending the invitation to the correct 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 business partner together with the invitation.

As a last step, you should define the Relationship type and hit ‘Send Invite’.

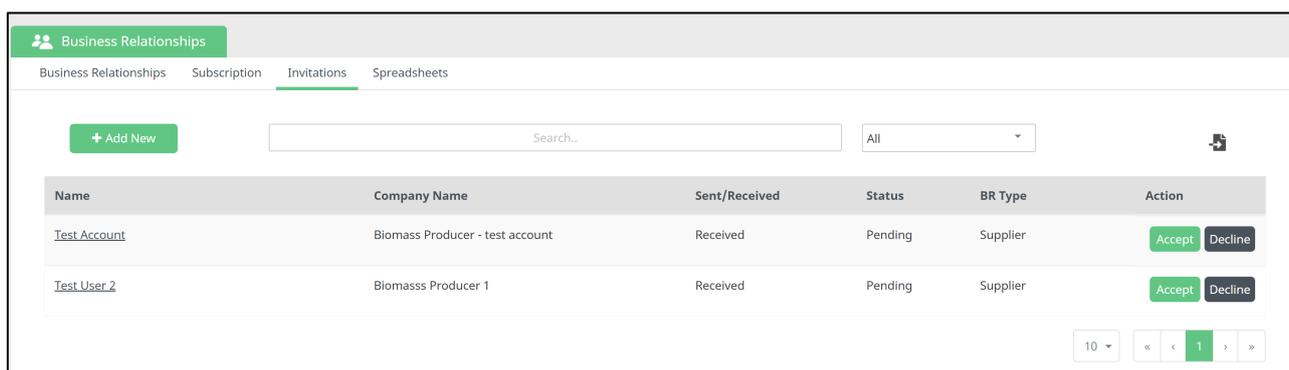
**Note:** In case your business partner is both your customer and your supplier, please select “Supplier”. This does not limit functionality in the system, but can be used when filtering data at a later stage.

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 Business Relationships:

The screenshot shows a web form titled "Invite a new Business Relationship". At the top, there is a search bar labeled "Search Companies...". Below this are several input fields: "\*Company Name", "Company Description", "\*Contact Person First Name", "\*Contact Person Last Name", and "\*Contact Person Email". There is also a text area for "Invitation Text". At the bottom, there is a "Business Relationship Type \*" section with radio buttons for "Client" (selected) and "Supplier". Two buttons, "Send Invite" (green) and "Back" (grey), are located at the bottom right of the form.



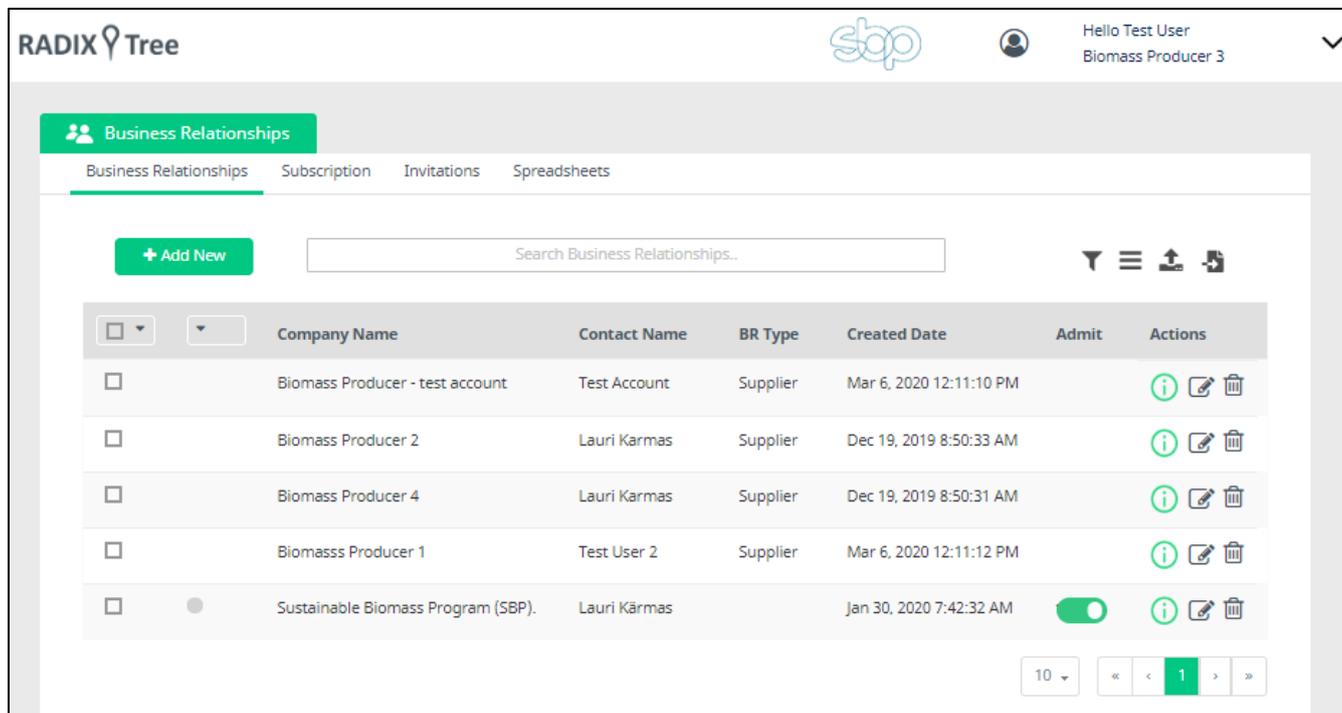
Clicking on the message opens the Business Relationship invitation detail menu. This shows all sent and received invitations.



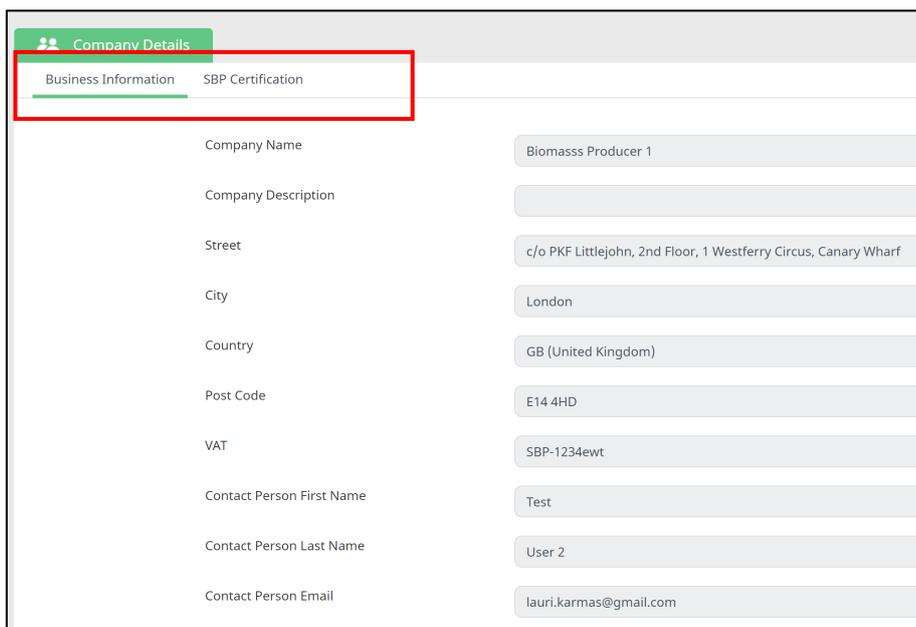
**Note:** The general assumption is that Business Relationships are established with all your direct suppliers and customers. This allows visibility of company data and Standard 5 documents between you and your supplier/customer. In cases where the supply chain includes more links than a producer and 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.

## 3.2 Managing Business Relationships

Clicking on the **Business Relationships** menu opens the overview of all relationships.



To view Business Relationship details, including SBP-certification data, click on the company name or on the green information button on the right-hand side of the screen. Company details are divided into two separate subsections: 'Business Information' and 'SBP Certification'.





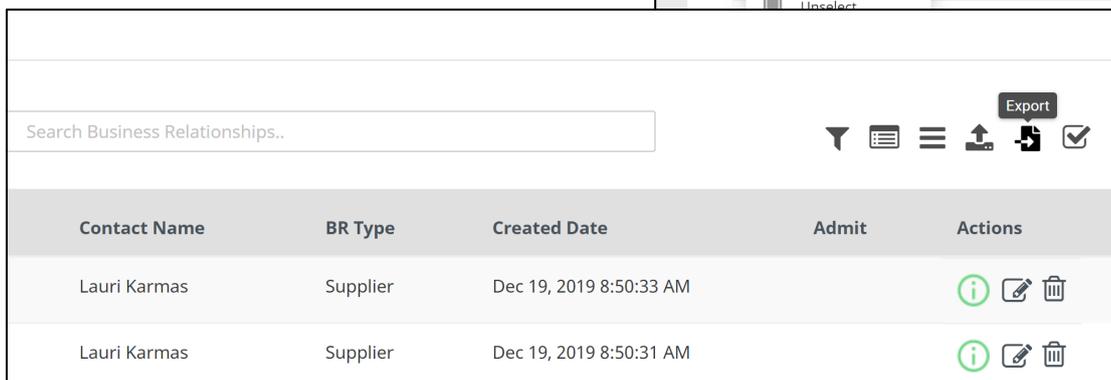
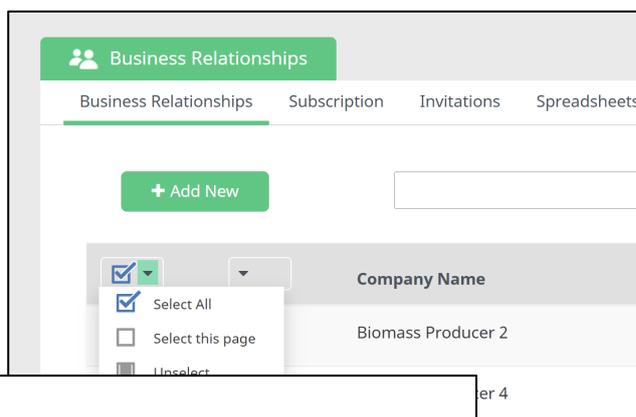


### 3.4 Exporting Business Relationship details

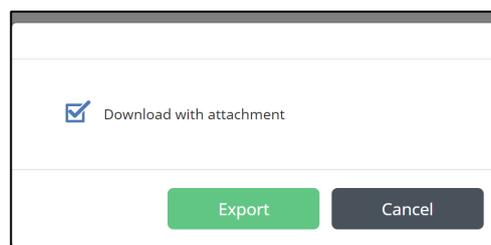
The system provides an option to mass export Business Relationship data. This enables mass querying of information, such as SBP certificate codes, expiry dates, certificate status, active SDI codes and certification scopes of your Business Relationships.

To get started, navigate to your **Business Relationship** tile. Next, either select the Business Relationships you want to export or click **“Select All”**.

Then navigate to tools menu and click **“Export”**



The system then asks you, if you want to also download all attachments (e.g. SAR documents as pdfs). Clicking **“Export”** will initiate the download process of the Excel file. The export file includes two worksheets: **“Business Relationship”** and **“SBP Certification”**.



## 4 Transactions

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

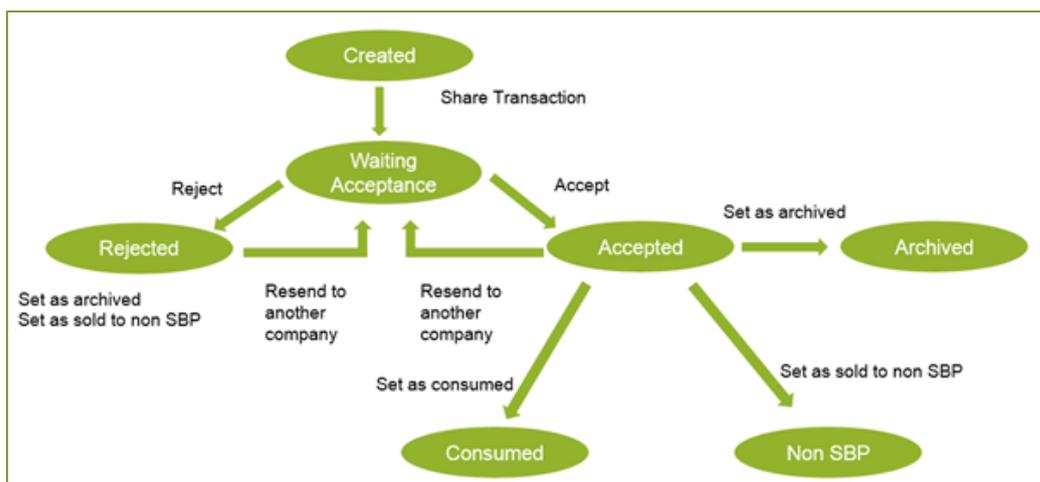
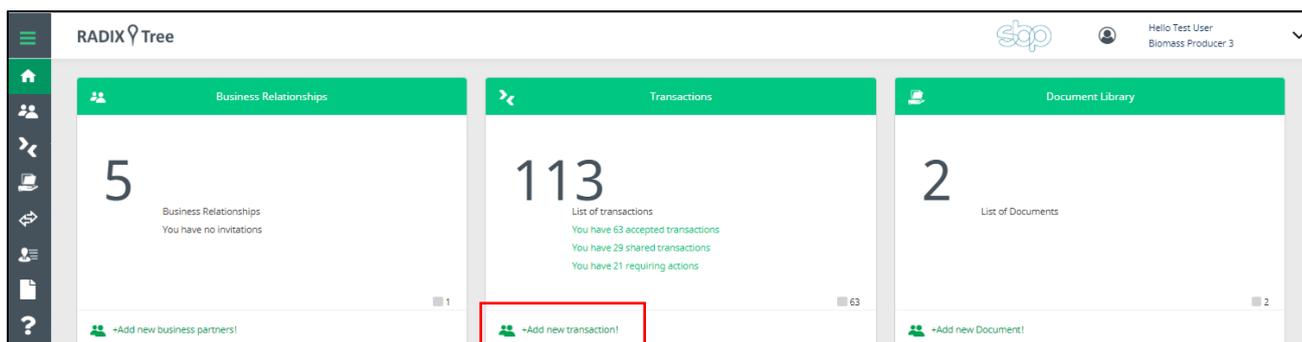


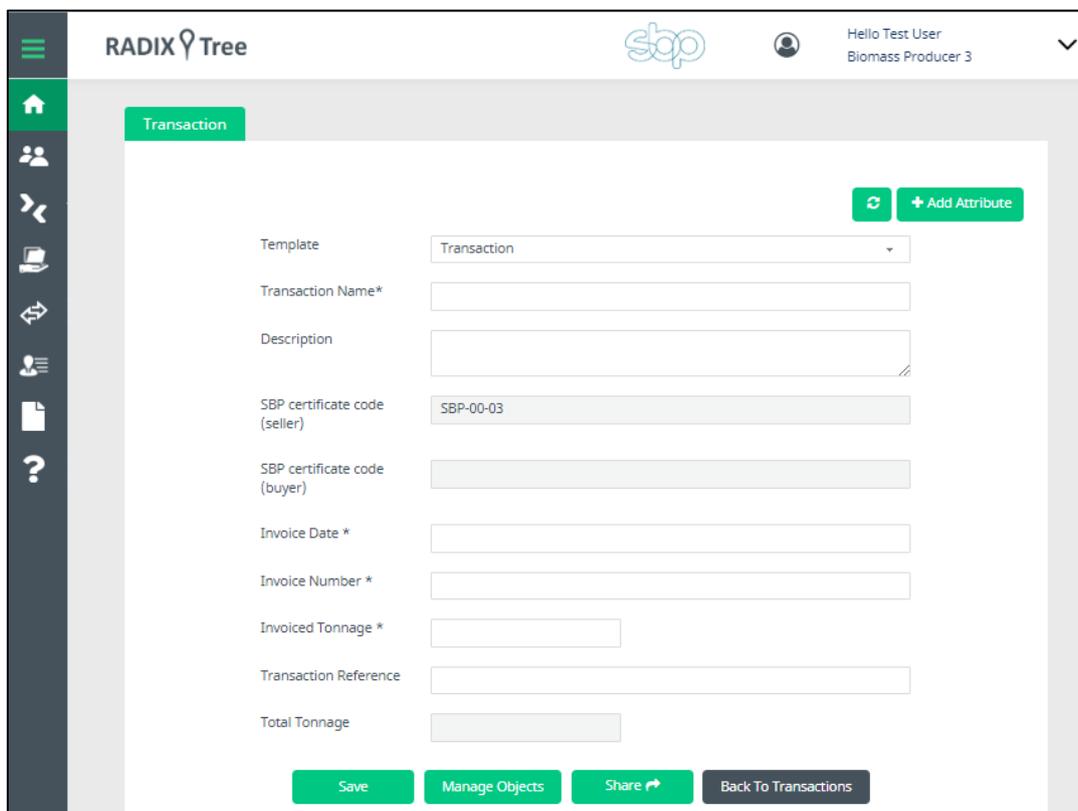
Figure 1. Transaction workflow

### 4.1 Creating a new Transaction

To create a new Transaction, click on **'Add new transaction!'** button on the Transactions tile.



Next, a form with Transaction details comes up.



The screenshot shows the 'Transaction' form in the RADIX Tree application. The form is titled 'Transaction' and is located within a sidebar navigation menu. The form fields are as follows:

- Template: Transaction (dropdown menu)
- Transaction Name\*: (text input field)
- Description: (text input field)
- SBP certificate code (seller): SBP-00-03 (read-only field)
- SBP certificate code (buyer): (read-only field)
- Invoice Date \*: (text input field)
- Invoice Number \*: (text input field)
- Invoiced Tonnage \*: (text input field)
- Transaction Reference: (text input field)
- Total Tonnage: (text input field)

At the bottom of the form, there are four buttons: Save, Manage Objects, Share, and Back To Transactions. There is also a '+ Add Attribute' button in the top right corner of the form area.

**Note:** fields with an asterisk (\*) are required. The user should not add any attributes, only fill in the visible fields.

**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.

**Transaction Description** is an optional field to give additional description to the transaction, if desired.

**SBP certificate code (seller)** is a read-only field, which includes the seller's certificate code.

**SBP-certificate code (buyer)** is a read-only field, which includes the buyer's certificate code. This field will be auto-populated once the transaction has been shared.

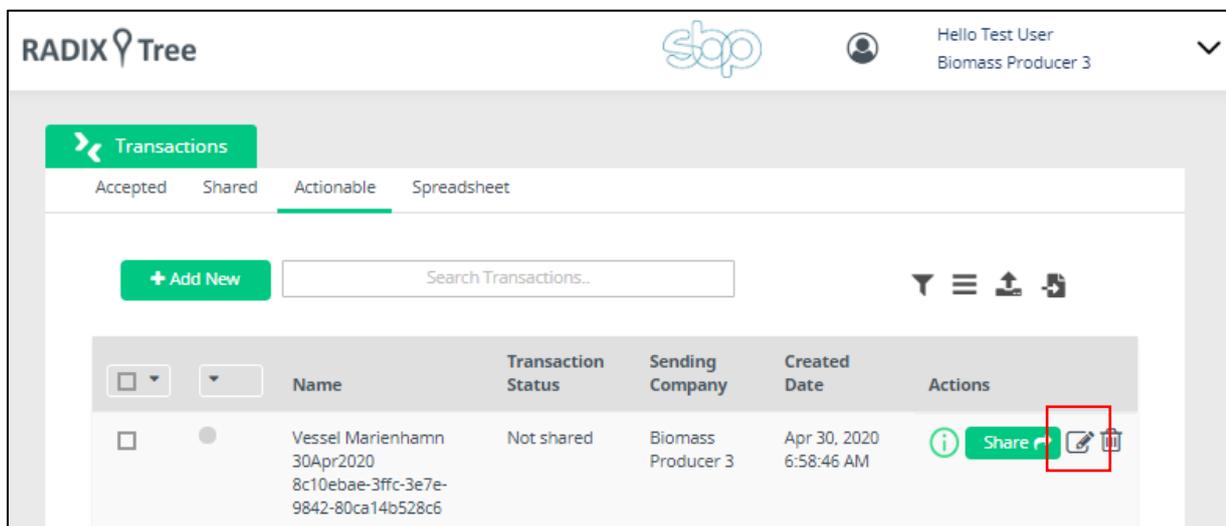
**Invoice Date** is a required field that shall match with the invoice date on the physical sales invoice. In cases where the invoice is not yet generated, a date from a delivery document may be used.

**Invoice Number** is a required field that shall match with the invoice number on the physical sales invoice. In cases where the invoice is not yet generated, a matching number with a delivery document may be used.

**Invoiced Tonnage** is a required field that shall match with the total invoiced amount. This may differ from the total transaction tonnage in case the sales invoice also includes non-certified biomass.

**Transaction reference** is an optional field for companies to include a transaction reference other than the invoice number.

After filling these fields, the user can save the transaction. After saving, the transaction is listed under "Actionable" transactions. Note that a transaction shall have at least one transaction batch before it can be shared (see next paragraph – adding 'objects' to transaction).



To edit a transaction that is under the “Actionable” transactions list, click on the  icon.

## 4.2 Transaction objects

A Transaction shall have at least one object attached to it before it can be shared. There are multiple types of objects that can be attached:

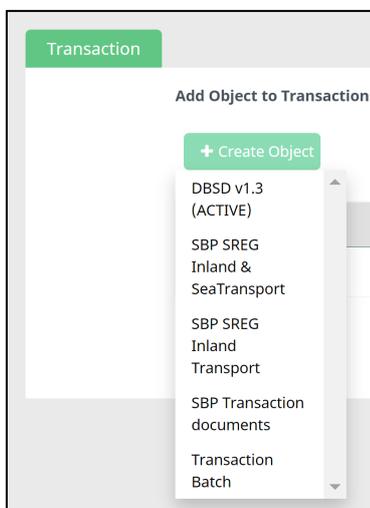
- Transaction Batch – required for all transactions
- SREG (inland transport)
- SREG (sea transport)
- Transaction document
- Dynamic Batch Sustainability Data (DBSD)

To add objects to the transaction, click on the “Manage objects” button on the transaction edit mode.



This will open a Transaction objects overview page, where the user can see objects already attached or add a new object.

Hover the mouse over “+ Create Object” button and select the object you want to create and add to the transaction.



## 4.2.1 Transaction Batches

Choosing “Transaction batch” from the objects lists will open a new window with transaction batch data.

**Note:** The Transaction Batch form is predefined and includes all required fields. The user does not need to use “+ Add Attribute” button to add other data to the batch form.

**Transaction Batch Name** is a required field to differentiate 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).

**SDI list** is a dropdown field that includes all active approved SDIs from the SBP SAR document. This includes SDI code and description. Note: This is only applicable for Biomass Producers. For trading activities, a value “Other” should be used to manually enter the SDI code.

**AA-code** is a dropdown field with values ‘00’ and ‘99’. If the transaction includes DBSD data object, then ‘99’ should be used, in all other cases ‘00’ should be used.

**Product type** is either Chips or Pellets.

**Production Batch ID (PB ID)** is a read-only field, that is a combination of the SDI code and AA-code. The PB ID is always in the form: “SBP-XX-YY-ZZ(Z)-AA”, where SBP-XX-YY-ZZ(Z) is the Static Data Identifier (SDI) and AA is the Dynamic Batch Sustainability Data Identifier.

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

**SBP claim type** is either SBP-Controlled or SBP-Compliant. Only one transaction batch at a time can 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.

**Batch type** is a read-only field that shows if the added transaction batch is produced or traded by the company sharing the transaction.

Finally, click **Submit**. 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. But, this is only permitted if the transaction has not been shared with your customer. Once the transaction is shared, it is not possible to edit data in a transaction.

#### 4.2.2 SREG forms

DTS 2.0 has integrated SREG forms that replace the following SBP template documents:

1. SBP Audit Report (SREG) on Energy and Carbon Data for Supplied Biomass for Inland and Sea Transport;
2. SBP Audit Report (SREG) on Energy and Carbon Data for Supplied Biomass for Inland Transport

SREG forms are ‘objects’ in the DTS and can be attached to every single transaction. To add a SREG form to the transaction, click on the “Manage objects” button when in the transaction edit mode, hover the mouse over “+ Create Object” button and select the SREG object from the list. The DTS includes two SREG objects:

- SREG Inland Transport
- SREG Sea Transport

It is possible to create and attach multiple SREG objects to a single transaction.

The SREG Inland Transport form includes only inland transportation data:

+ Add Attribute

Template \*  ▼

SBP SREG Inland Transport Name \*

**SECTION 1: GENERAL INFORMATION**

SREG Start location

SREG End location

**SECTION 2: INLAND TRANSPORT**

Mode of transport  ▼

Transport powered by  ▼

Additional Distance (km)  km

Conventional or Actual distance  ▼

Transport capacity (Metric tonnes)  mt

Actual fuel use (if available)

Backhaul

Notes

Submit
Cancel

The SREG Sea Transport form includes the sea transportation data in addition to the inland transportation data:

**SECTION 2: SEA TRANSPORT**

Sea Transport Not Applicable \*

Vessel IMO

Vessel Name

Capacity of the whole ship used - [Nominal capacity]  ▼

Sea transportation fuel type  ▼

|   |                      |    |
|---|----------------------|----|
| TOTAL energy consumption for the sea transport (Metric tonnes)                              | <input type="text"/> | mt |
| Approximate distance to destination port (sea miles)  | <input type="text"/> | nm |
| Description of any storage, handling or trans-shipment                                      | <input type="text"/> |    |
| Quantity of biomass handled at the different storage, handling and trans-shipment locations | <input type="text"/> |    |
| Please provide sources of information mentioned above                                       | <input type="text"/> |    |

### 4.2.3 Transaction documents

It is possible to attach documents to the transaction. This is also managed under the objects menu.

To add documents to the transaction, click on the “Manage objects” button when in the transaction edit mode, hover the mouse over “+ Create Object” button and select the ‘SBP Transaction documents’ object from the list. Next, give the document a name and upload it from the computer. Finally click save and repeat the process if you want to add more documents.

×

+ Add Attribute

|                                  |   |
|----------------------------------|---|
| Template *                       | <input type="text" value="SBP Transaction documents"/>    |
| SBP Transaction documents Name * | <input type="text"/>                                      |
| SBP Document                     | <input type="button" value="Choose File"/> No file chosen |

Submit
Cancel

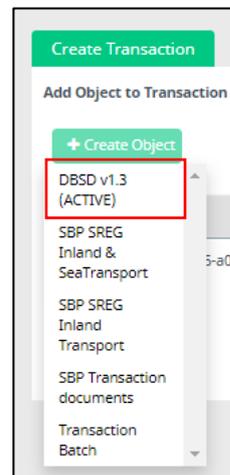
### 4.2.4 Dynamic Batch Sustainability Data (DBSD)

Additional requirements apply to those SBP Certificate Holders wishing to supply certain markets, e.g. the Netherlands or Flanders. These additional requirements include transferring additional data through the DTS.

In order to be able to use the additional functionality of transferring DBSD through the DTS, the Biomass Producer’s SBP certificate scope shall include communication of Dynamic Batch Sustainability Data (DBSD).

Additional data shall be added to the transaction by using the DBSD ‘object’. To add a DBSD object to the transaction, make sure that the transaction already includes Transaction Batch Object – DBSD can only be added to the transaction after at least one transaction batch has been created. To add the DBSD object, hover over ‘+ Create Object’ button and select DBSD object from the list. NB: The object list may include previous versions of the DBSD template, the user shall always select the latest version of the template, which is marked as “Active”.

Next, fill in all required fields (help text for each field is displayed when you hover the mouse over the field name):



|   |                         |
|---|-------------------------|
| Template *  | DBSD v1.3               |
| DBSD v1.3 Name *  | <input type="text"/>    |
| Production Batch ID *   | <input type="text"/>    |
| Biomass tonnage (t)   | <input type="text"/> mt |
| Biomass Category *  | Search Here             |
| Market Specific Status  | Select                  |
| NTA 8003 level 3 code *   | Select                  |
| Country of Origin of the Feedstock *  | <input type="text"/>    |
| Feedstock Certification System *  | Search Here             |
| Feedstock certification system claim  | <input type="text"/>    |
| Feedstock is sourced by using SBP ID2D (Group Scheme) *                                 | Search Here             |
| Feedstock is sourced by using SBP ID2E (SDE+ Category 2) *                              | Search Here             |
| Other (optional)  | <input type="text"/>    |
| <b>Flanders</b>   |                         |
| Flanders compliant stemwood excluding the share corresponding to trees above 40 years * | Search Here             |
| Biomass Category 5 restricted to sawdust and shavings                                   | Search Here             |

**DBSD Name** is a free text field to name the data object. No predefined format. Examples: “DBSD 1”, “Dynamic Data 1”, etc.

**Production Batch ID** is the PB ID that is related to the DBSD tonnage. Only one PB ID can be selected per DBSD object. The PB ID shall match with the PB ID which is previously entered to the transaction’s batch. PB ID has to follow the format “SBP-XX-YY-ZZ(Z)-AA”. The AA-code shall always be ‘99’ when DBSD is used.

**Biomass Tonnage** is the tonnage of the biomass for the DBSD entry. This volume of the biomass is linked with all the parameters included in the DBSD.

**Biomass Category** is the Biomass Category as defined by SDE+, please chose the appropriate one. A description of the categories is included in the SBP Instruction Document 5E Collection and Communication of Energy and Carbon Data v1.1, paragraph 5.3 - NL Biomass Categories SDE+.

**Market Specific Status** is the compliance status of the biomass covered by the DBSD, please choose the appropriate one. The following options are available (multiple options can be chosen):

- NL SDE+ Compliant
- NL SDE+ Controlled
- Flanders Compliant
- Flanders Controlled
- Not Applicable

**NTA 8003 level 3 code** is the NTA 8003 classifications as presented in the graphic below and as defined at the following website: <https://www.ecn.nl/phyllis2/Browse/Standard/NTA-8003> (in Dutch), please choose the appropriate one.

NTA 8003 feedstock classifications suitable for pellets are:

- 111 mix of fresh wood,
- 116 by-products industry, incl. sub-categories:
- 112 bark,
- 115 sawdust,
- 119 other fresh wood/residues

**Country of origin of the feedstock** please enter all countries of origin of the feedstock that were used to produce the volume of biomass that is included in the DBSD. In cases where the feedstock is sourced from multiple countries, the share (%) of each country shall be included. Example: “Denmark – 10%, Germany 90%”. The share % shall always total 100% for one DBSD entry.

**Feedstock certification system** please select the feedstock certification system. Please see all SDE+ approved schemes [here](#). For Category 5 – N/A.

- ATFS
- Better Biomass
- FSC International (V5)
- FSC US
- GGL
- SFI
- ISCC
- Other (specify below)

**Feedstock certification system claim** (optional) please add a specific claim of the feedstock certification system, e.g. ‘FSC 100%’ or ‘FSC Controlled Wood’. For Category 5 - N/A.

**Feedstock is sourced by using SBP ID2D (Group Scheme)** indicate if the feedstock has been sourced from SBP Group Scheme members. For Category 5 - select N/A.

**Feedstock is sourced by using SBP ID2E (SDE+ Category 2)** please indicate if the feedstock is sourced according to SBP Instruction Document 2E: SBP Requirements for Risk Based Approach for Biomass Category 2. For Category 5 - select N/A.

**Other** (optional) is for any other notes.

A sub-section “Flanders” is displayed where the “Status” field option is any of the following:

- Flanders Compliant
- Flanders Controlled

This sub-section includes following fields:

**Flanders compliant stemwood excluding the share corresponding to trees above 40 years** picklist yes/no

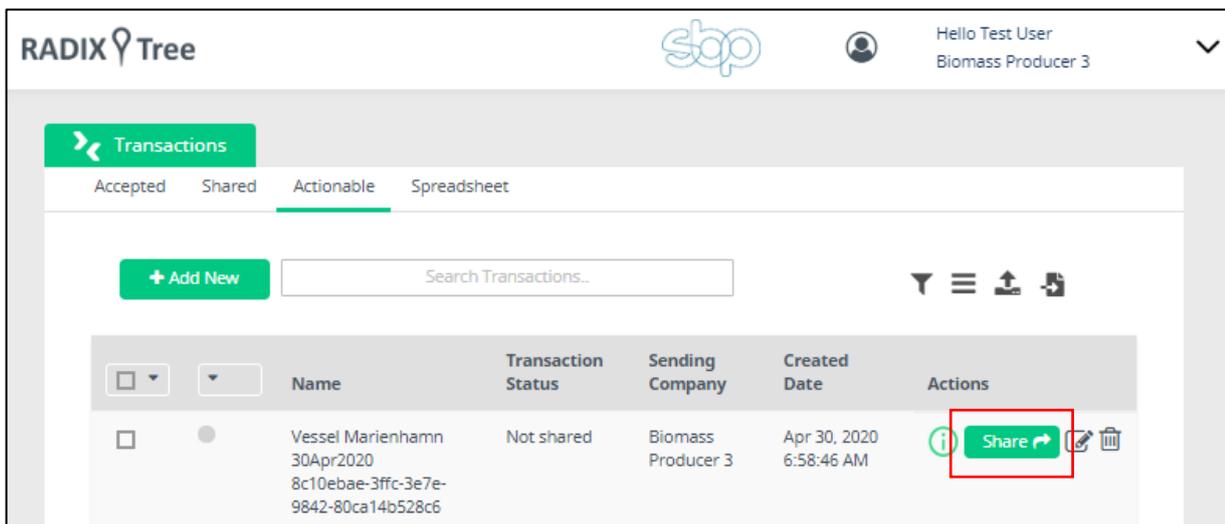
**Biomass Category 5 residues restricted to sawdust and shavings** picklist yes/no

### 4.3 Sharing transaction

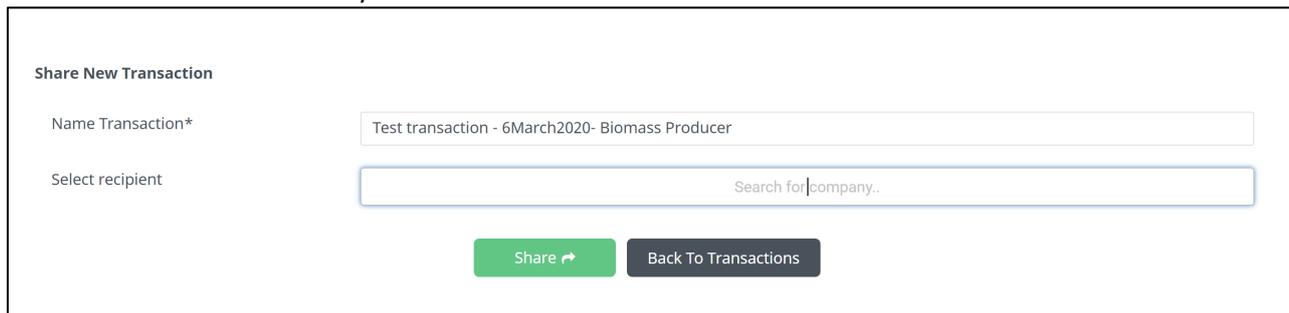
Once you have added Transaction Batches and any other relevant objects to the transaction, you are ready to share the transaction with your customer and add invoice specific data. To share a transaction, you need to click on the “Share” button either when in the Transaction edit mode:



Or the “Share” button on the Actionable transactions list view:



After clicking the “Share” button, a new page will appear where you have to enter the company/customer with whom you want to share the transaction.

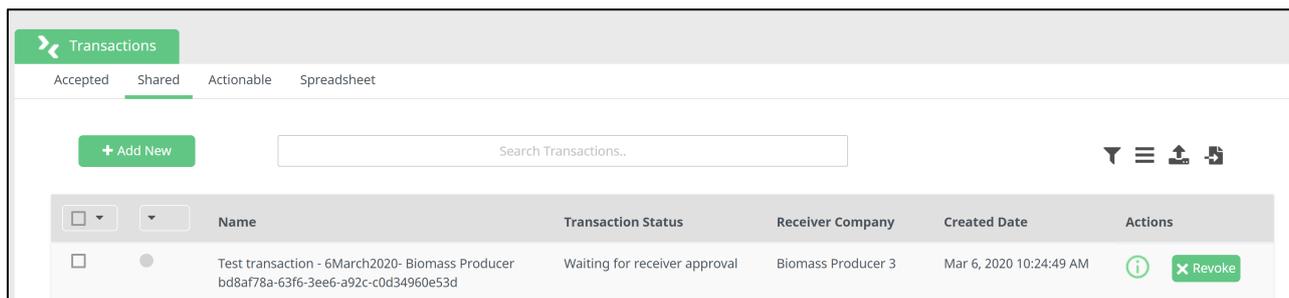


Start typing in the company name you want to share the transaction with, and the system will find the match for you from your Business Relationships.

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

**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 will be moved from the “Actionable” view to the “Shared” view.



Clicking on the transaction or on the information button will show more details about the transaction sharing status. The upper section of the details page includes automatic fields that are updated as the transaction is created, shared and accepted or rejected.

1. The transaction details section after creating the transaction. The 'Edit' button is visible since the transaction has not been shared yet. Only the Name, Status and Created Date fields are visible.

| Transaction Details   |   |
|-----------------------|---|
| <b>Name</b> :         | Vessel Name - 9 March 2020 - Grand Victoria 1             |
| <b>Status</b> :       | Not shared <input checked="" type="button" value="Edit"/> |
| <b>Created Date</b> : | Mar 10, 2020  |

2. The transaction details section after the transaction has been shared with another Business Relationship, but is still pending. The 'Edit' button has disappeared and the transaction is locked. The status has been updated to "Waiting for approval" and one new field – "Receiving Company" has been added.

| Transaction Details        |   |
|----------------------------|---|
| <b>Name</b> :              | Vessel Name - 9 March 2020 - Grand Victoria 1 |
| <b>Status</b> :            | Waiting for approval                          |
| <b>Receiving Company</b> : | Biomass Producer 3                            |
| <b>Created Date</b> :      | Mar 10, 2020                                  |

3. The transaction details section after the transaction has been accepted by your business partner. The additional fields, Sharing Company, Sending Date and Accepted Date have appeared. The status has been updated.

| Transaction Details        |   |
|----------------------------|---|
| <b>Name</b> :              | Vessel Name - 9 March 2020 - Grand Victoria |
| <b>Status</b> :            | Accepted                                    |
| <b>Sharing Company</b> :   | Biomass Producer - test account             |
| <b>Created Date</b> :      | Mar 9, 2020                                 |
| <b>Receiving Company</b> : | Biomass Producer 3                          |
| <b>Sending Date</b> :      | Mar 9, 2020                                 |
| <b>Accepted Date</b> :     | Mar 9, 2020                                 |

**Sharing Company** shows which company has shared the transaction with you when it is an accepted transaction. If the transaction is shared by you it shows your company name. This is updated once the transaction has been shared.

**Receiving Company** shows the company that has accepted the transaction. This field updates itself after acceptance of the transaction.

**Status** is updated automatically after creation, sharing, acceptance or consumption of the transaction.

**Created Date** is a timestamp of the date when the transaction was first created.

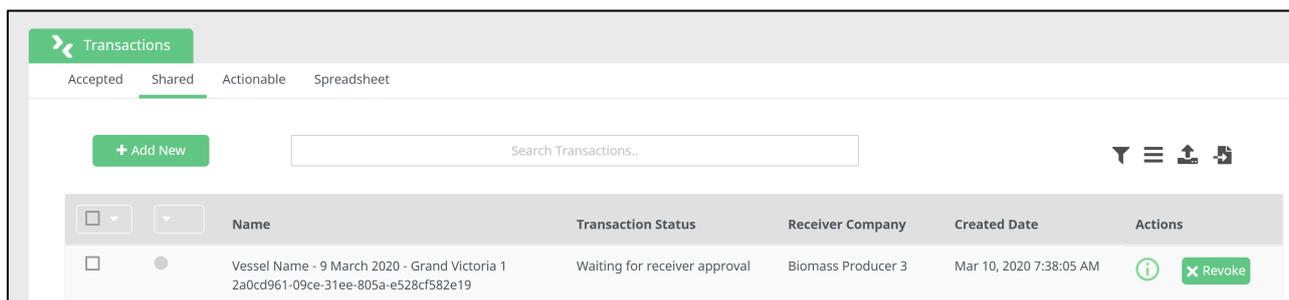
**Sending Date** shows the date when the transaction was shared (not accepted) in the DTS.

**Accepted Date** shows the date when the transaction was accepted by the business partner in the DTS.

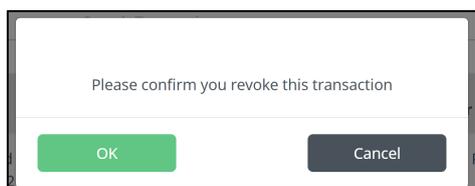
**Note:** The date fields above are not invoice-specific, but system fields that are updated as the status of the transaction changes.

## 4.4 Revoking transactions

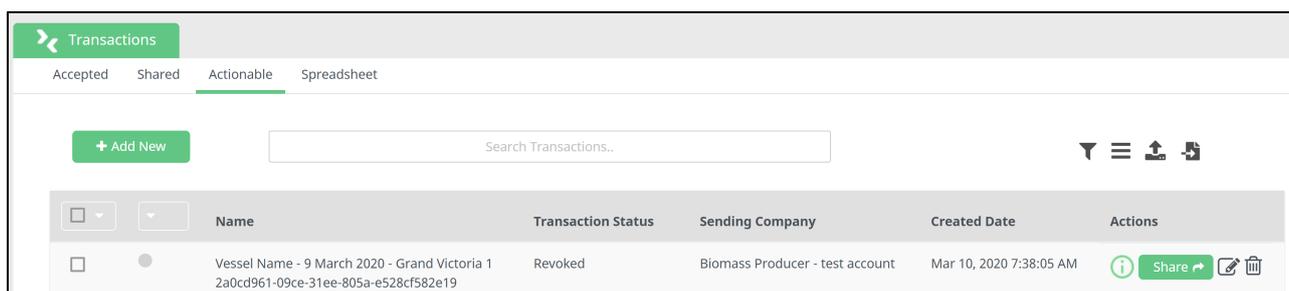
The system allows transactions that you have shared with your business partner, but which have not yet been Accepted or Rejected to be revoked. This enables the user to revoke the transaction to make any necessary changes or fixes to the transaction and share it again. Once revoked, the transaction will disappear from the customer’s pending transactions list. The customer will get an email notification once the transaction has been revoked. To revoke a transaction that is currently locked and in “Waiting for receiver approval” status, open the “Shared” transactions view and click on the  button.



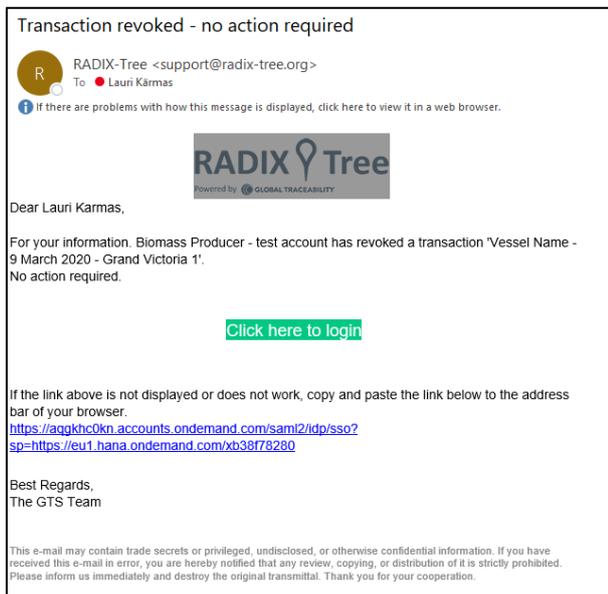
The system asks you to confirm the action to avoid accidental clicks on this button.



Once confirmed, the transaction is moved from the “Shared” transactions to “Actionable” transactions and becomes editable again. The status is updated to “Revoked”. The user can make necessary changes and share the transaction again.



An email notification is sent to the business partner whose transaction was revoked:



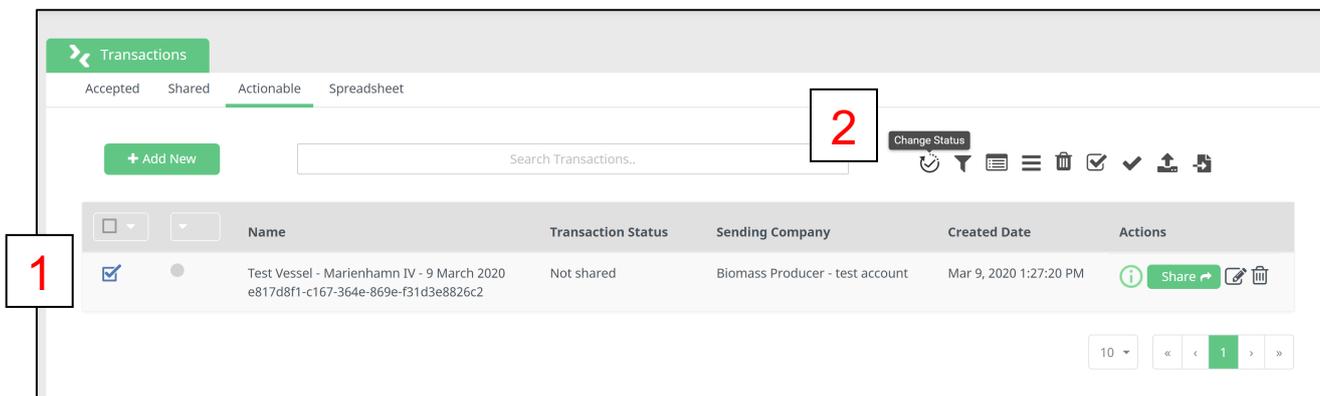
## 4.5 Selling to non-certified customers

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 “4.2 Sharing Transactions”.

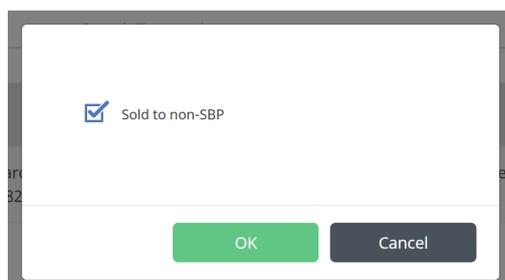
In order to sell SBP-certified biomass to non-certified organisations, create a new transaction as described in the section “4.1 Creating new transaction” and add transaction batches as described in the section “4.2 Transaction Objects”.

After the transaction has been created and relevant transaction objects added, save the transaction and return to the “Actionable” transactions list.

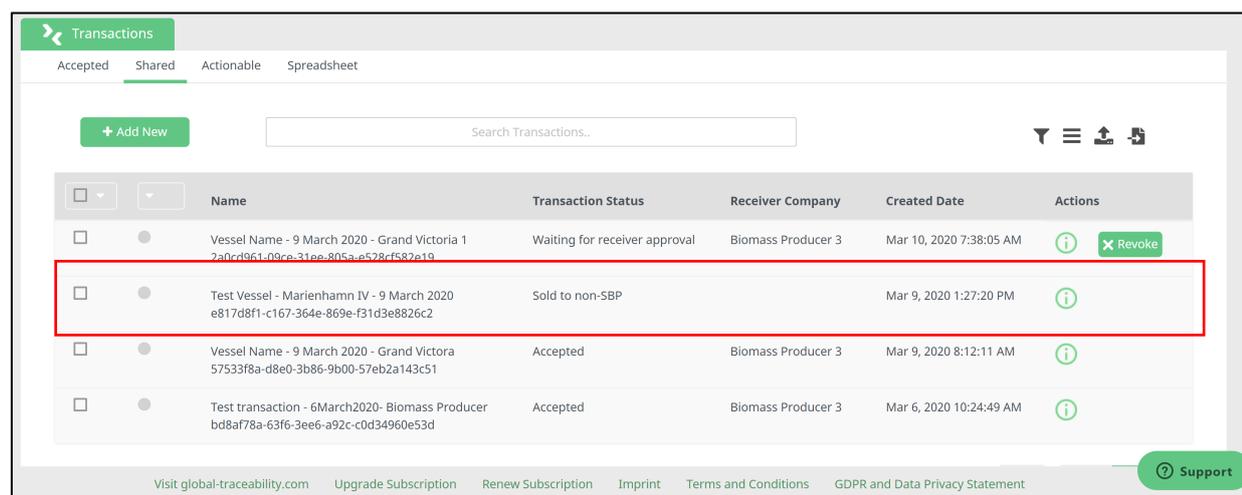
**To set the transaction status to “Sold to NON-SBP”, check the transaction and click on “Change status” button as shown below:**



Next, you will need to confirm the status change:

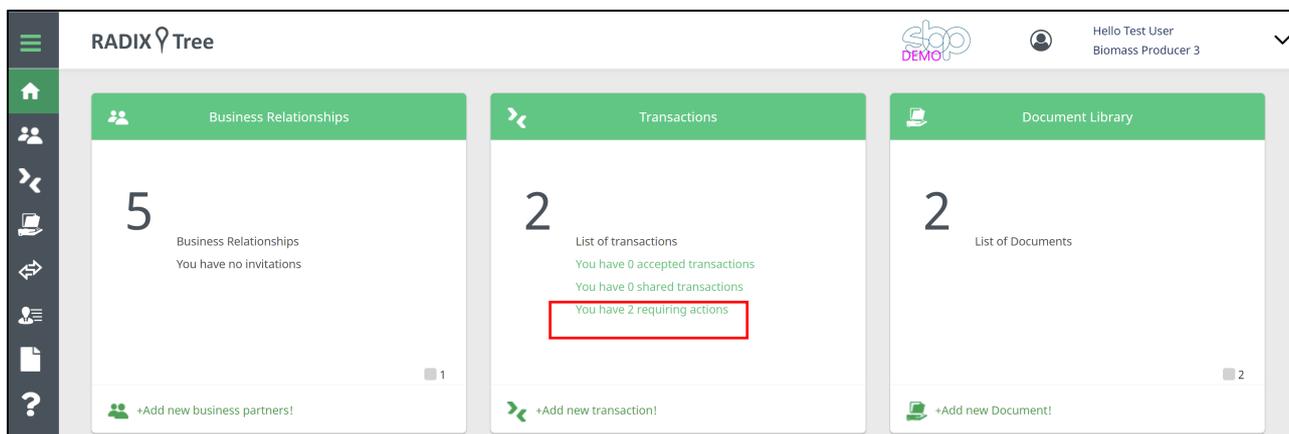


This will update the transaction status to “Sold to non-SBP” and locks it to prevent further editing. The transaction is also moved from “Actionable” to “Shared”.



## 4.6 Accepting and Rejecting transactions

An email notification is sent to the receiver of the transaction after the transaction has been shared with them. There will be an in-system notification to the customer about the new transactions.



After clicking on the notification, the “Actionable” transactions view will open, where the user can accept the transactions.

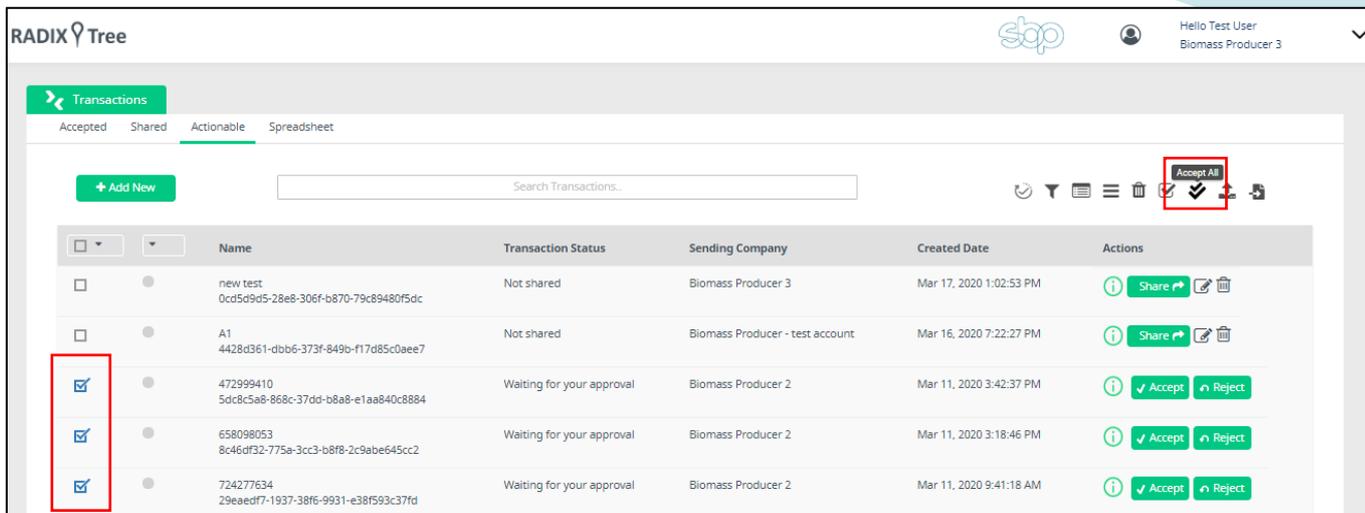
To view details about the incoming transaction, click on the transaction name or on the  button.

**Acceptance** of the transaction updates the status of the transaction to “Accepted” and updates other transaction details, such as Status and Accepted Date. After accepting the transaction, the transaction is moved from the “Actionable” transactions to “Accepted” 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. 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. When clicking the “Reject button, the user has to enter the “Rejection reason”, which the supplier can review to make relevant changes or fixes to the transaction.



The system allows mass-accepting of incoming pending transactions. To accept multiple transactions at a time, open the Actionable transactions view and select the transactions you want to accept and click on the “Accept all” button as shown below:



## 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 the same attributes is to be traded to the next customer. This means that with direct trading, it is not possible to change the transaction batch information including SBP claim, product type, PB ID and tonnage. It is also not possible to add transaction batches or delete already attached batches.

It is possible, however, to update invoice-specific fields, transaction name and description and add other objects, such as SREG, DBSD form or transaction documents.

For direct trading, the incoming transaction from the supplier must be first accepted in the DTS. Then, go to the **“Accepted”** transactions section. Next, find the transaction you want to reshare and click on

the **Reshare** button. This opens the Transaction detail section, where you have to enter a new Invoice Date, Invoice Number, Tonnage and Transaction reference. The transaction name is by default the same as it was on acceptance, but it is possible to edit this as well.

Click the **“Manage Objects”** button to review existing objects and to add any new ones.

After this step is complete, click **Share** button, which will open the page to select the business partner with whom to reshare the transaction.

**Transaction**

**Share New Transaction**

Name Transaction\*

Select recipient

Share ↗
Back

Resharing the transaction clones the incoming transaction and the reshared transaction will get a new unique ID. The accepted transaction will remain under the “Accepted” transactions view and after clicking “Reshare”, the system clones the transaction with all the objects attached and the clone is copied to “Actionable” transactions. It is only possible to reshare an incoming transaction once.

The unique ID of the transaction is displayed beneath the transaction name:

| Name  | Transaction Status            | Receiver Company   | Created Date            | Actions   |
|---|-------------------------------|--------------------|-------------------------|---|
| 197414696 - resharing<br>aad122e4-a911-35da-8a39-c268397a7891 | Waiting for receiver approval | Biomass Producer 4 | Mar 10, 2020 8:43:17 AM | <span style="color: green; font-size: 20px;">i</span> <span style="background-color: #4CAF50; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 10px;">✕ Revoke</span> |

**Note:** All objects added to the transaction by different links in the supply chain will be visible to the next owner of the transaction in the DTS. Example: A Biomass Producer adds an SREG document to 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 the End-user A, End-user A can see the transaction documents from the Biomass Producer as well as from the Trader A.

## 4.8 Trading biomass (combining/splitting transactions)

In cases where biomass is not directly shared with the next legal owner, but is either unloaded in storage facilities and sold later, combined with biomass from other producers, or split between different customers, the 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, larger transaction in the DTS, the user shall first receive the biomass from the supplier in the DTS.

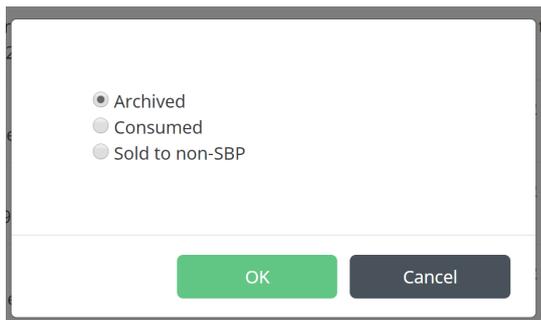
After the incoming biomass transactions have been accepted, a **New Transaction** shall be created.

Next, **Transaction Batches** shall be created manually by the user. The Transaction batch can then include up to the same volume of biomass that had 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 transaction, which carries 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 (e.g. 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 a new transaction created afterwards shall be Archived. In addition, transactions that are received with an SBP claim, but sold without an SBP claim, shall be marked as “Archived”.

To change the status of the accepted transaction to “**Archived**”, open the “Accepted” transaction view and select the transaction that you wish to set to “Archived” status and click on the “Change Status”  button, choose the “Archived” option from the list and hit OK.



Archiving the transaction will update the status of the transaction to “Archived” and locks it to prevent further editing. It is only possible to mark transactions that have not been reshared directly, consumed or sold to non-SBP customers as Archived.

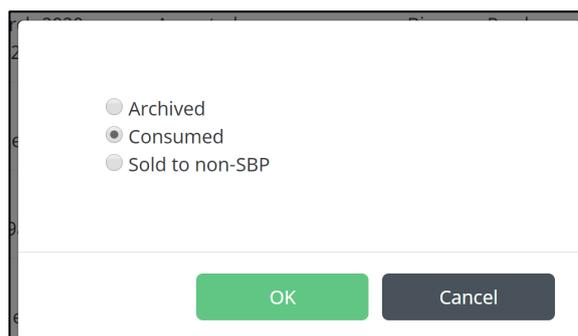
## 4.9 Setting biomass as consumed (End-users only)

End-users of biomass are required to mark all transactions “**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.

**Biomass End-users should mark all transactions that have been physically consumed to “Consumed” status a minimum of twice (2 x) per year and always before an upcoming SBP surveillance audit.**

To mark an accepted transaction as consumed in the system, select the transactions from the “Accepted” transactions list and click on the “Change Status”  button, choose “Consumed” option from the list and hit OK.

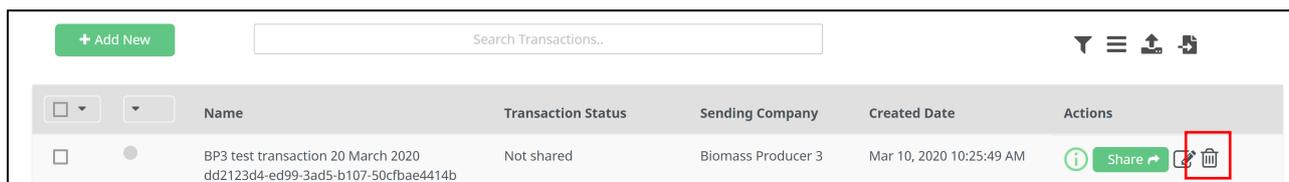
After setting the transaction to “Consumed” status it becomes locked and it is no longer possible to reshare or change the status of this transaction.



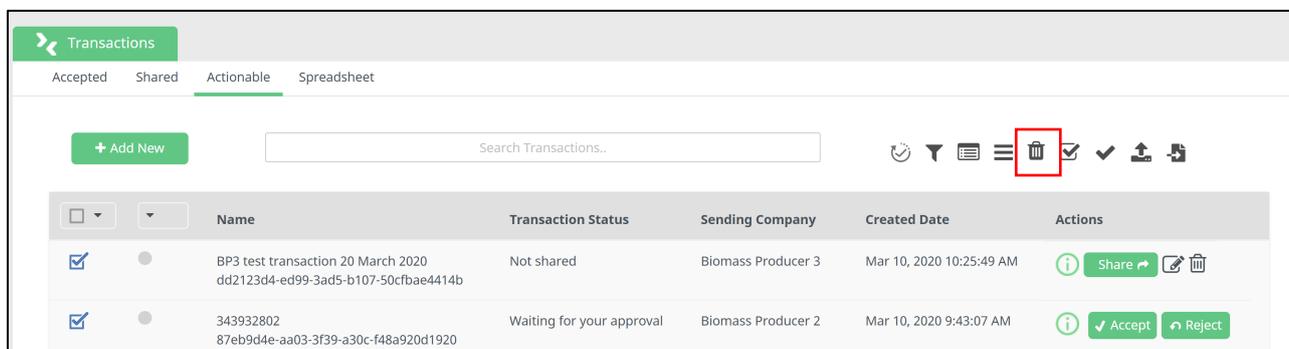
## 4.10 Deletion of transactions

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

This means that only transactions under “Actionable” that have been created by the user itself, can be deleted. To delete a transaction and all related objects, click on the button next to the transaction:



To delete multiple transactions together, select the transactions and click on the button on the top menu:



## 4.11 Correcting already shared transactions

It is not possible to change or delete already shared and accepted DTS transactions. However, should errors be discovered it is necessary for corrections to be made. Corrections should be made as follows:

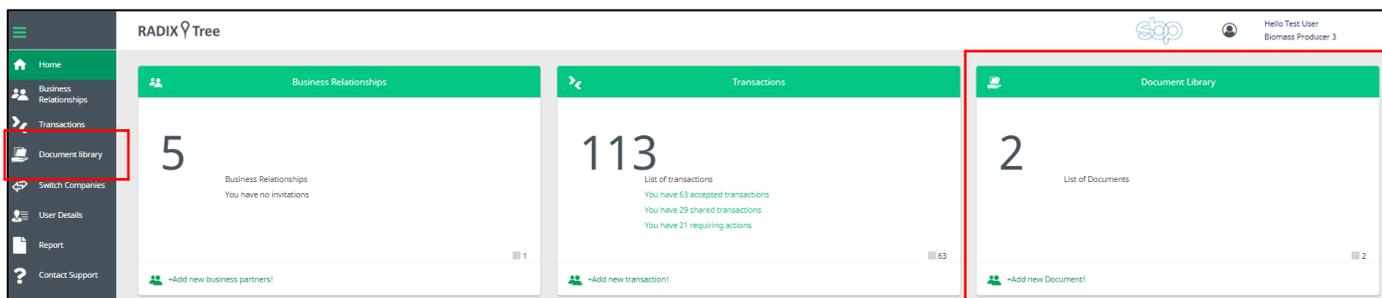
- 1) Tonnage of the original transaction is incorrect. To amend the tonnage of the original transaction, a new DTS transaction must be created. The new transaction shall include the same details, including transaction batch data and invoice references, as the original transaction except the batch tonnage shall be the difference in tonnage between the incorrect tonnage entered and the correct tonnage. If the actual tonnage is smaller than that entered, then enter a negative batch tonnage. In addition, a transaction description should be added to state that the new transaction amends the original transaction with a specific reference code. The transaction must be shared with and accepted by the customer.
- 2) Full DTS transaction needs to be credited/removed. As it is not possible to remove a transaction, it needs to be credited so that the total tonnage for the transaction with a specific reference is balanced out to zero. To credit a full transaction, the same steps as described under 1) must be followed, with the full tonnage entered as a negative amount.
- 3) Other details about the biomass needs to be changed. In cases where the core data of the original transaction need to be changed (e.g. SBP claim, PB ID, etc), then option 2) must be applied first to fully credit the incorrect transaction. Once fully credited, a new and correct transaction must be

created and shared with and accepted by the customer. It is also an option to credit the incorrect transactions batches and add correct data within one new transaction at the same time.

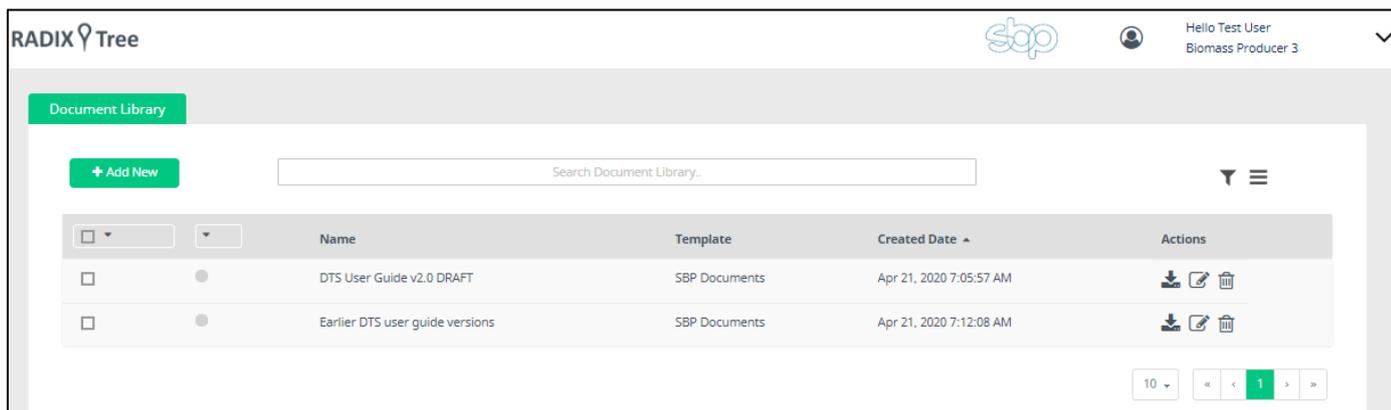
The approach of using credit transactions allows Certification Bodies to verify all changes to the transactions.

## 5 SBP Document Library

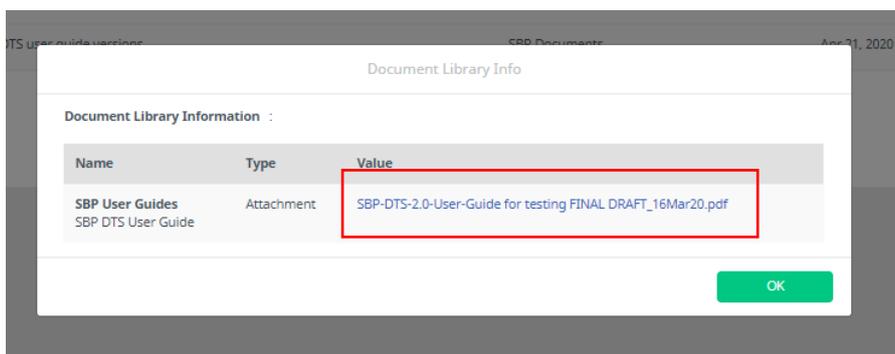
On the home screen and on the left side menu is a tile called “Document Library”. This menu is read-only for the user and is maintained by SBP. This allows the user to quickly access the most recent version of the DTS user guide.



To access the Documents Library, click on the tile in the centre of the screen or click on the relevant menu on the left side menu. This opens an overview of all the documents uploaded:



To open or download a specific document, click on the document name and then on the document link:

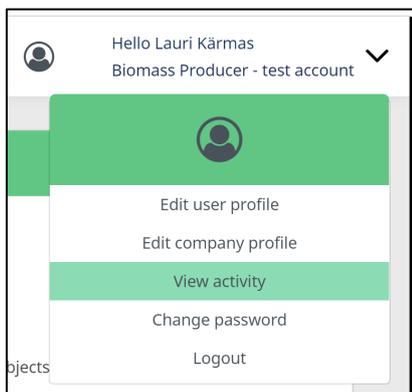


## 6 Noticeboard

In the centre of the home-screen, there is a tile called “Noticeboard”. This tile gives the user an overview of the changes in SBP certification among the Business Relationships. Example: ‘Biomass Producer 1’ SBP certificate is suspended – all companies connected to ‘Biomass Producer 1’ in the DTS will get a notification on their home screen’s Noticeboard about this change. Updates in the Noticeboard are displayed for five days.

## 7 History log

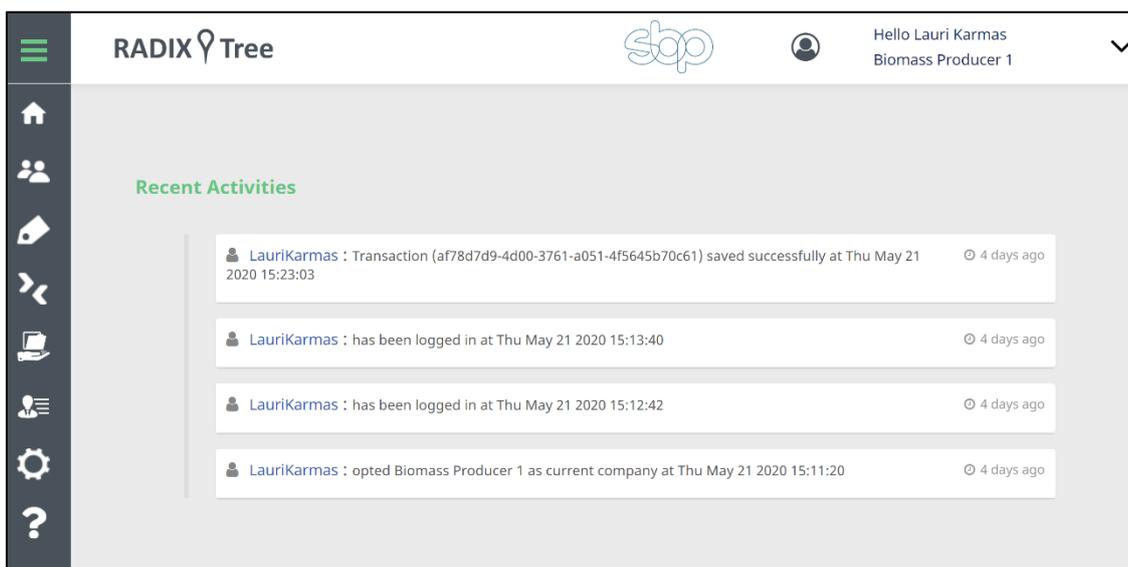
DTS 2.0 includes a history logging functionality. This is available for the full user activity and includes also login history.



The history log can be accessed from the profile menu “**View activity**” section.

The history log displays the most recent activities with the activity description and the timestamp. The default time zone in the history log for all users is Greenwich Mean Time (GMT).

The log also includes records of supervising Business Relationships (e.g. SBP, CB or Technical Support) accessing the account.



## 8 Data exporting and Reporting

It is possible for all users to export the transaction data in the DTS to an Excel (.xls) format at any time.

There are two options to export data in the DTS 2.0:

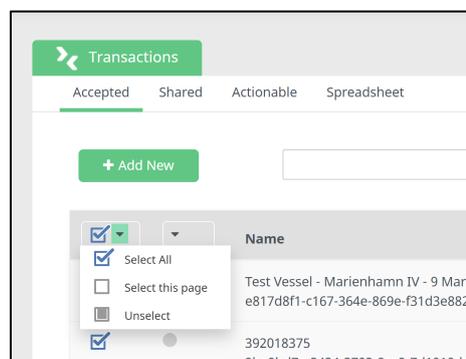
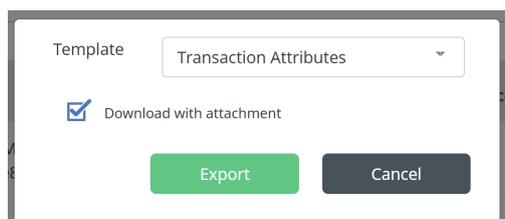
- Option 1 - export of selected transactions under the **Transactions menu**
- Option 2 - mass export under the **Reports menu**

Option 1 is available directly under the Transaction menu. This option allows users to export the transaction data that are manually selected. The Export function downloads all transaction and object data, additionally it is possible to export all attachments that are associated with these transactions.

To get started, navigate to the **Transactions** menu and select the transactions you want to export. You can manually select these or use the “Select all” or “Select all on this page” function.

After selecting the transaction, click on the export button 

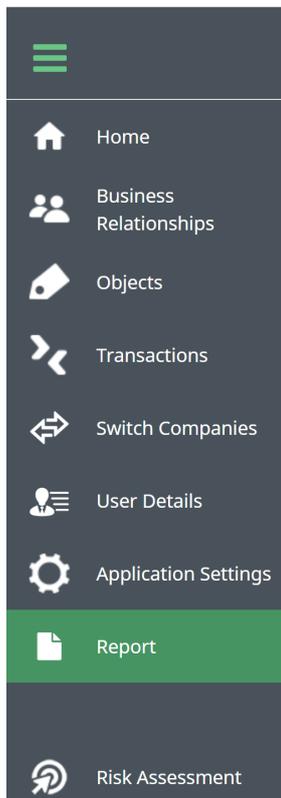
The system will then ask if you want to download the attachments as well.



Clicking the ‘Export’ button will start the download. Transaction data will be downloaded as an .xlsx file type and the downloads will be included in a .zip file.

The exported Excel file will have multiple worksheets – depending on the different objects attached to the transactions. For example:

- Transaction Master
- Transaction
- Transaction Batch
- SBP Transaction documents
- DBSD
- SREG Inland transportation
- SREG Inland and Sea transportation



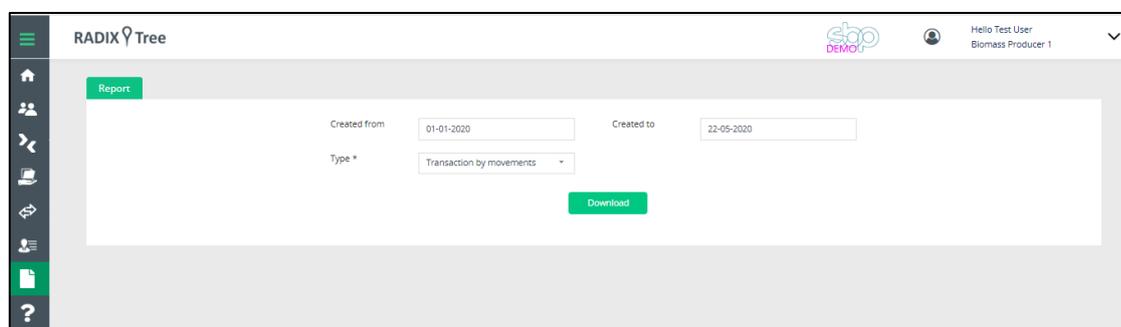
Option 2 is data mass export using the **Report** menu.

The page has three available fields that the user needs to define before exporting the data.

**Created from** enter the earliest creation date of the transactions that you want to be included in the report.

**Created to** enter the latest creation date of the transactions that you want to be included in the report.

**Type** select the type of the report (see report types below).



**Available report types** currently one report type covering all transaction and related object data is available – “Transactions by movements”. This report includes all incoming and outgoing transactions in separate Excel worksheets. In addition, all related objects (Transaction Batch, SREG forms, DBSD, documents, etc) are included in the report.

## 9 Using DTS test environment

All SBP Certificate Holders can use the demo environment of the DTS for any testing activities. All actions taken in the demo system are for test purposes only, including Transaction sharing, Business Relationship creation and withdrawal and any other action. The demo system may include outdated data, be occasionally offline or include features not included in the live environment.

The demo system is marked with purple “DEMO” watermark on top of SBP logo:



Please contact [DTS@sbp-cert.org](mailto:DTS@sbp-cert.org) with a request to get DTS demo account activated.

The demo system can be accessed [here](#).

## 10 Getting help and submitting feedback

Please submit all questions, enquiries, feedback and ideas for improvement regarding the DTS 2.0 to [DTS@sbp-cert.org](mailto:DTS@sbp-cert.org) or submit the issue directly through DTS built-in support desk.