BRITISH COLUMBIA

TRANSPORTATION FUELS REPORTING SYSTEM

IDIR USER GUIDE v1.1

B.C. MINISTRY OF ENERGY,
MINES AND PETROLEUM RESOURCES

November 4, 2019

Transportation Fuels Reporting System (TFRS) IDIR User Guide

I. Background

The Transportation Fuels Reporting System (TFRS) is an online application for Part 3 fuel suppliers to manage their compliance obligations under the *Greenhouse Gas Reduction (Renewable and Low Carbon Fuel Requirements) Act* and the Renewable and Low Carbon Fuel Requirements Regulation (known collectively as the BC-LCFS).

The Ministry of Energy, Mines and Petroleum Resources is taking an Agile approach to software development, which places an emphasis on engaging end-users during product development and delivering continuous value by building and releasing features iteratively. The TFRS development team is committed to following the latest best practices for Agile software development, as outlined in the Office of the Chief Information Officer's (OCIO) digital toolkit.

Leveraging Agile's iterative approach, the initial release of TFRS enables users to:

- View their credit balance
- View a history of their credit transactions (credit transfers, Part 3 awards, validations, and reductions)

As the development of TFRS continues, new features will be introduced so that, once completed, TFRS will enable users to:

- Transfer validated credits between Part 3 fuel suppliers
- Receive credits for the completion of designated milestones under Part 3 Agreements
- Have credits validated from the supply of low carbon fuels
- Manage their organization's users
- Receive notifications
- Securely submit files
- Complete compliance reports and exclusion reports

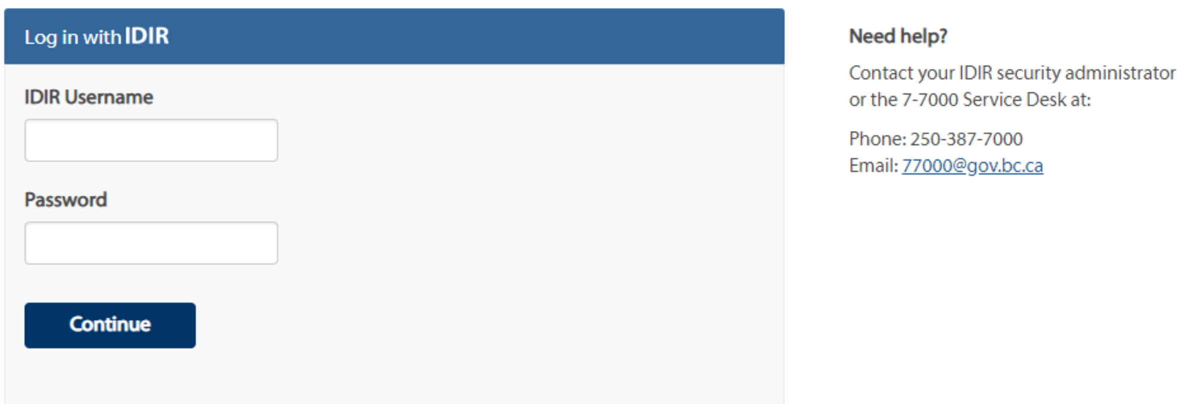
Additional TFRS resources:

- TFRS Project Documentation: https://github.com/bcgov/tfrs/wiki
- TFRS Releases Documentation: https://github.com/bcgov/tfrs/releases
- TFRS Feature Development Tracking: https://trello.com/b/O9L8CXes

II. TFRS Access

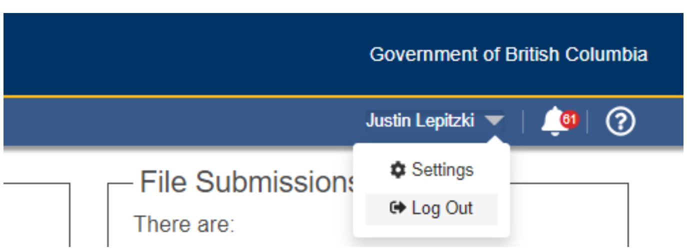
Logging In

The TFRS application can be accessed at https://lowcarbonfuels.gov.bc.ca with your IDIR credentials. **It is recommended that you access TFRS using a supported browser, such as Chrome, Firefox or Safari. Internet Explorer is not fully supported; certain features will not function correctly.**



Logging Out

You can find the log out option near the top right of the screen in a dropdown menu where your name is displayed:



Tables

Referring to the diagram below, you can sort data in the different tables in TFRS by clicking on the column header (shown in red). A line across the top of the header indicates an ascending list (lowest to highest), while clicking again will show a line across the bottom of the header, indicating the list is sorted descending.

You can also filter the list by typing values into the blank spaces immediately underneath the column headers as pictured (below in blue):

ID	Compliance Period	Type	Credits From
3		Credit Transfer	TFRS Biz Test
2		Credit Transfer	TFRS Biz Test
1	2018	Part 3 Award	N/A

To view additional details about an entry in a table, simply place your mouse over the row and click anywhere within that row.

Credits To	Quantity of Credits	Value Per Credit	Status	Last Updated On
TFRS IMBeing Green	1,000	$180.00	Draft	2019-06-27
TFRS IMBeing Green	250,000	-	Approved	2019-06-21

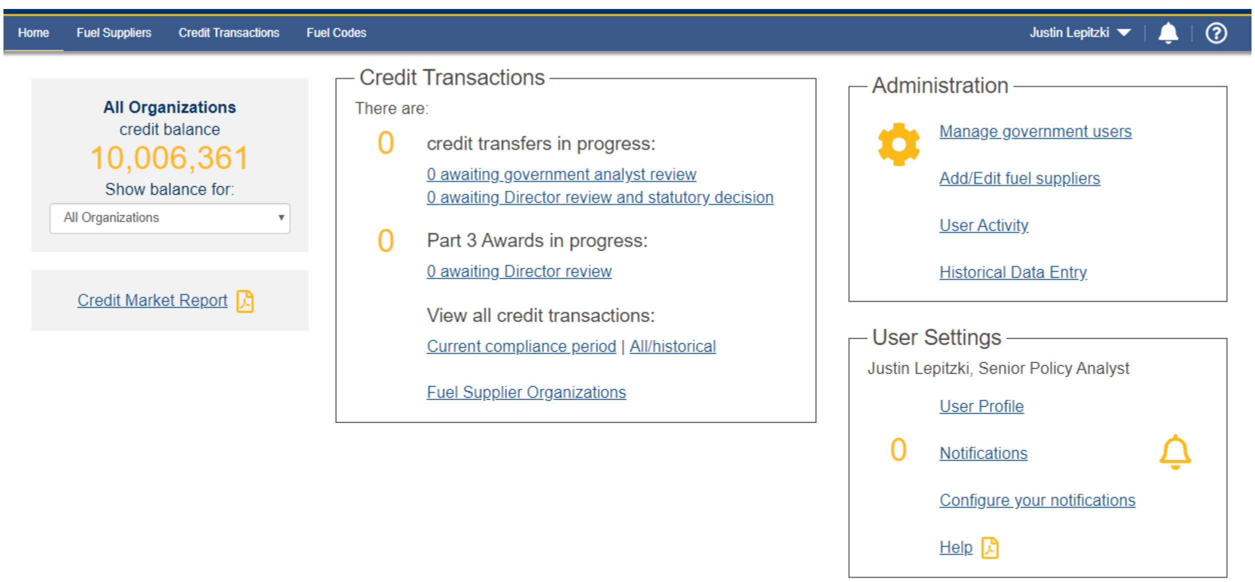
III. Navigating TFRS

User name and organization

After logging in, you will see your display name and your organization listed at the top right of the application.

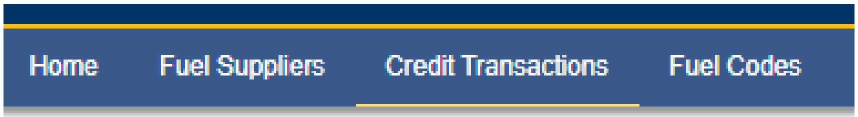
Dashboard

The dashboard is the main landing page and provides quick access to the various features in TFRS, including the credit transactions page, administration, user settings, and notifications. The dashboard also provides a link to the credit market report (Information Bulletin RLCF-017).



In the next release of TFRS, the dashboard will provide information on the number of credit transfers in progress and the status of compliance and exclusion reports. **In this release, the credit transfers and Part 3 Awards in progress will <u>always be zero.</u>**

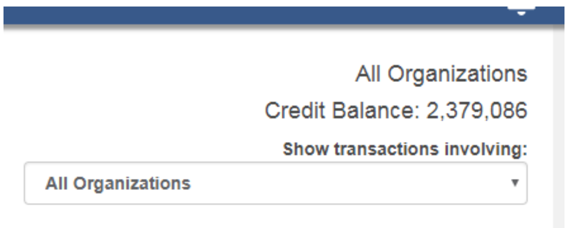
Credit Transactions page



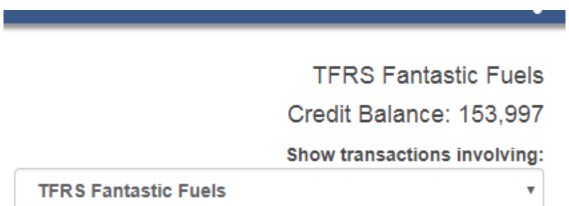
The Credit Transactions page provides an overview of the credit market, including a history of credit transactions: credit transfers, Part 3 awards, validations, and reductions.

Credit Balances

The credit balance of all organizations (i.e. the entire credit market) is displayed in the top right-hand corner of the webpage.

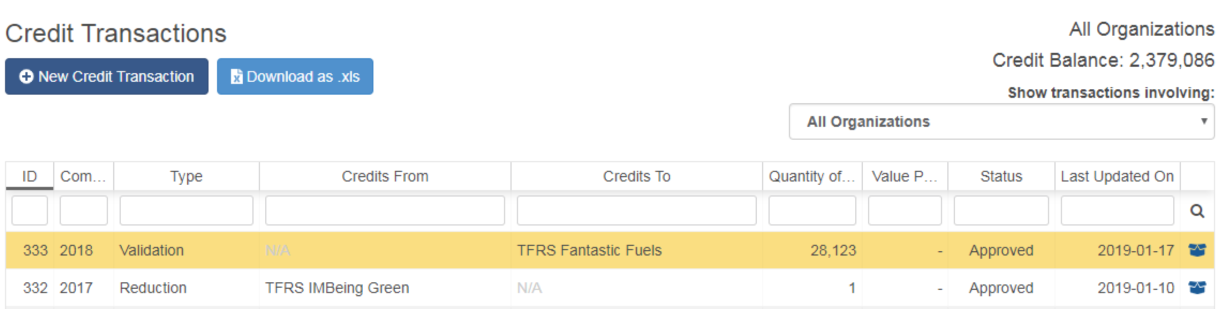


To view an individual organization's credit balance, select the organization from the drop-down menu.

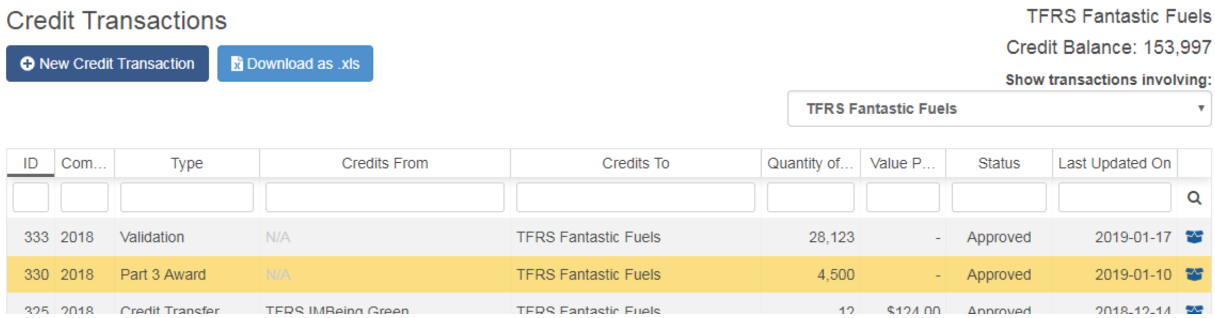


Credit Transactions Table

The main credit transactions table displays the historical credit transactions from all organizations. This table will update as new credit transactions are approved or declined.



To view the credit transactions that pertain to a single organization, select that organization from the drop-down menu on the top-right side of the page.



Columns

This section provides a description of each column in the Credit Transactions table.

The transaction types are:

- Credit Transfer
  - The transfer of validated credits between two Part 3 fuel suppliers.
- Part 3 Award
  - Credits awarded for the completion of designated milestones under a Part 3 Agreement.
- Validation
  - Validation of credits accrued through the supply of low carbon fuels (e.g. compliance reporting).
- Reduction
  - A reduction in an organization's credit balance from (1) applying previously validated credits to offset a net debit balance in a compliance period, or (2) revised compliance reporting.

The table below provides a description of the remaining columns based on the type of credit transaction.

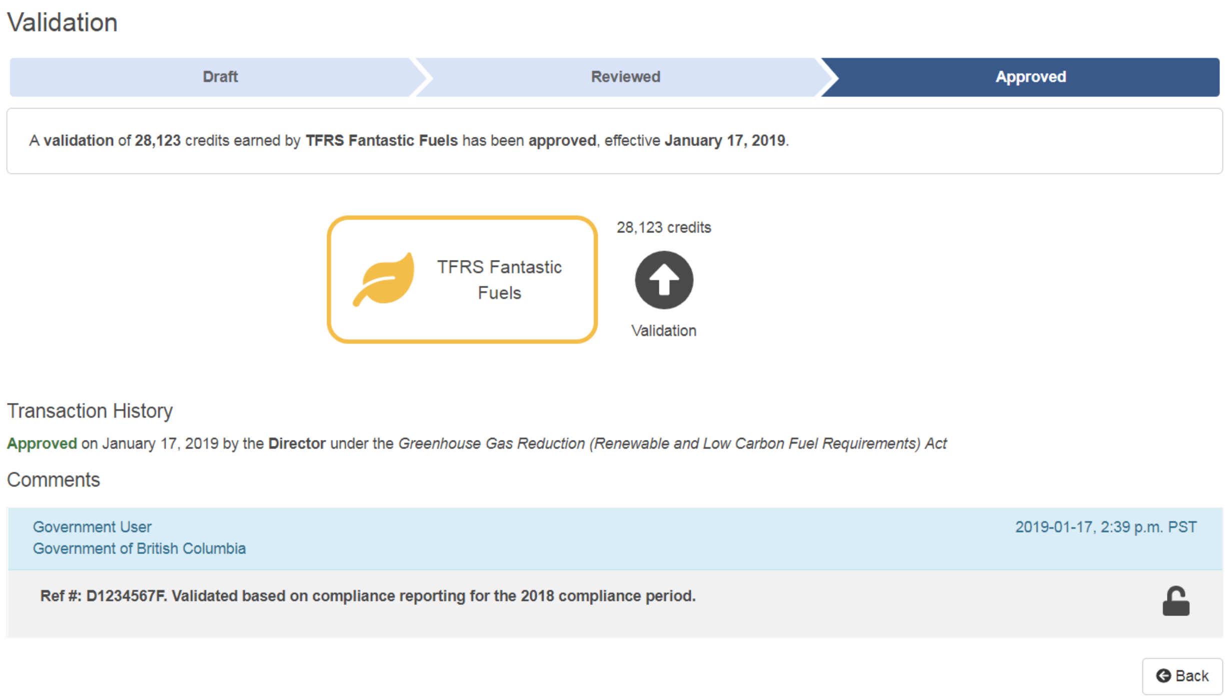
Column in TFRS	Credit Transfer	Part 3 Award	Validation	Reduction
ID	A unique ID given to each credit transaction entry			
Compliance Period	The compliance period in which the transfer occurred	The compliance period in which the Part 3 Award was issued	The compliance period in which the validation relates	The compliance period in which the reduction relates
Credits From	The Part 3 fuel supplier who is selling or otherwise transferring credits	N/A	N/A	The Part 3 fuel supplier in which the Reduction pertains
Credits To	The Part 3 fuel supplier who is buying or otherwise acquiring credits	The Part 3 fuel supplier in which the Part 3 Award pertains	The Part 3 fuel supplier in which the validation pertains	N/A
Quantity of Credits	Number of credits transferred	Number of credits awarded	Number of credits validated	Number of credits reduced
Value per Credit	Fair market value per credit ($CAD)	N/A	N/A	N/A
Last Updated	The date the transaction was last updated. In this initial release of TFRS, this will be the date the transaction was entered into the TFRS application.			

Credit Transactions Statuses

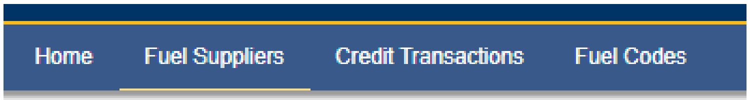
- Approved
  - The credit transaction was approved by the Director under the *Greenhouse Gas Reduction (Renewable and Low Carbon Fuel Requirements) Act* (Act).
- Declined
  - The Director under the Act declined to approve the credit transaction.

View Transaction Details

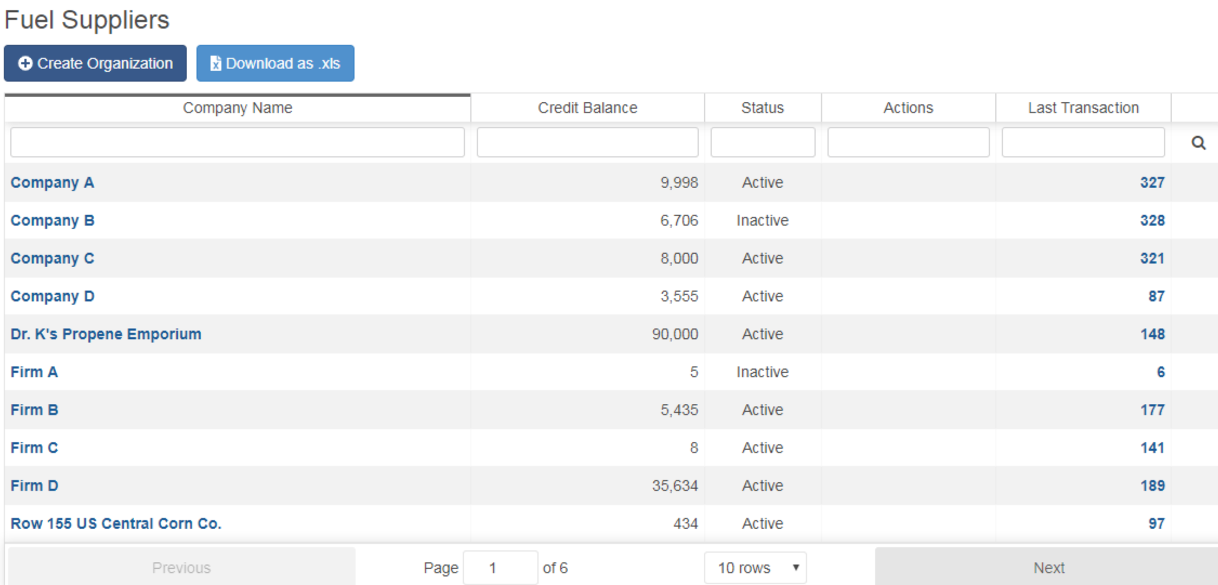
Clicking anywhere within the row of a particular transaction will take you to the view transaction details page, where additional information is provided with respect to that transaction.



Fuel Suppliers



The Fuel Suppliers page provides the complete list of recognized Part 3 fuel suppliers. This page contains each organization's credit balance, status, and latest credit transaction.



Fuel Suppliers

Create Organization | Download as .xls

Company Name	Credit Balance	Status	Actions	Last Transaction
Company A	9,998	Active		327
Company B	6,706	Inactive		328
Company C	8,000	Active		321
Company D	3,555	Active		87
Dr. K's Propene Emporium	90,000	Active		148
Firm A	5	Inactive		6
Firm B	5,435	Active		177
Firm C	8	Active		141
Firm D	35,634	Active		189
Row 155 US Central Corn Co.	434	Active		97

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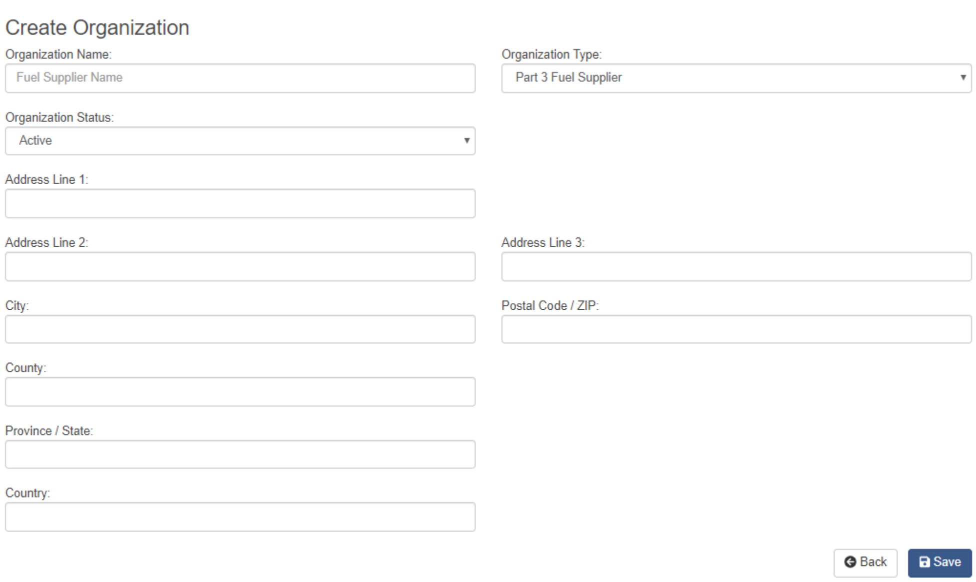
Create Organization

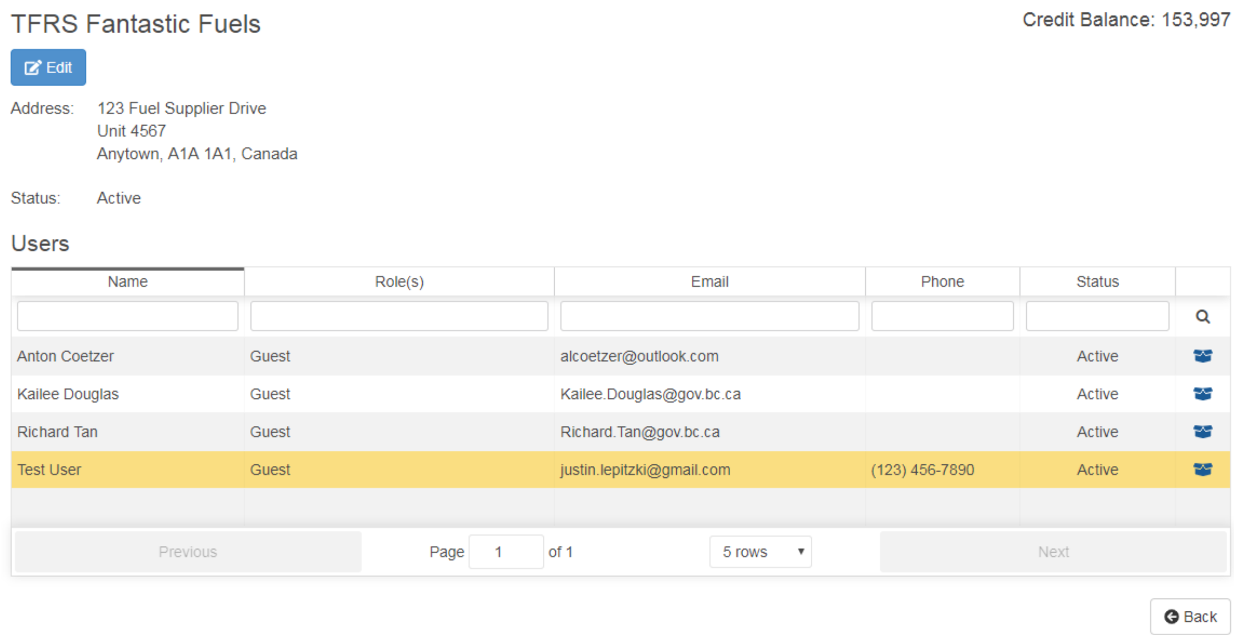
The Create Organization button allows the user to create new fuel supplier organizations in TFRS.



An organization's status indicates whether your organization is actively supplying fuel to British Columbia (i.e. **active** or **inactive**). An organization's status determines the **actions** that an organization can take within TFRS. An active organization is permitted to buy and sell low carbon fuel credits; an inactive organization is only permitted to sell low carbon fuel credits, assuming the organization has a non-zero credit balance.

Organization Details

To view additional information about a specific organization, click on their name in the table. The Organization Details page provides information about an organization's postal address, status, and users.



The Edit button allows the IDIR user to edit the organization's details:

- Organization name
- Status
- Postal Address

Clicking on a user provides additional details about that user, including a history of their activity within TFRS.

Test User

Company: **TFRS Fantastic Fuels**

Email: **justin.lepitzki@gmail.com**

Work Phone: **(123) 456-7890**

Mobile Phone: **-**

Status: **Active**

Role: **Guest**

Title:

User Activity

Action Taken	Transaction Type	Transaction ID	Timestamp	Fuel Supplier	
Rescinded	Credit Transfer	314	-	TFRS Fantastic Fuels	
Rescinded	Credit Transfer	311	-	TFRS Fantastic Fuels	
Signed 2/2	Credit Transfer	224	-	TFRS Fantastic Fuels	
Rescinded	Credit Transfer	216	-	TFRS Fantastic Fuels	
Rescinded	Credit Transfer	215	-	TFRS Fantastic Fuels	

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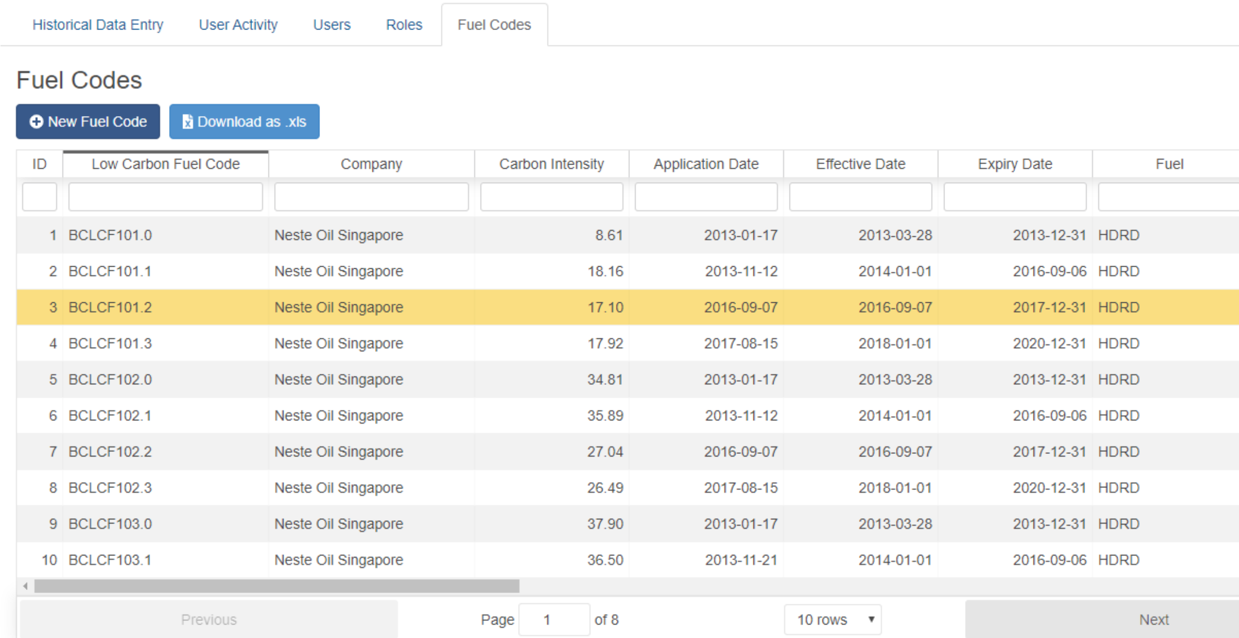
Fuel Codes

The Fuel Codes feature facilitates the management of B.C. low carbon fuel codes, including adding and updating fuel codes. Fuel code management has been moved into TFRS to enable the compliance reporting feature and fuel supplier access to compliance reports year-round.



ID	Low Carbon Fuel Code	Company	Carbon Intensity	Application Date	Effective Date	Expiry Date	Fuel
1	BCLCF101.0	Neste Oil Singapore	8.61	2013-01-17	2013-03-28	2013-12-31	HDRD
2	BCLCF101.1	Neste Oil Singapore	18.16	2013-11-12	2014-01-01	2016-09-06	HDRD
3	BCLCF101.2	Neste Oil Singapore	17.10	2016-09-07	2016-09-07	2017-12-31	HDRD
4	BCLCF101.3	Neste Oil Singapore	17.92	2017-08-15	2018-01-01	2020-12-31	HDRD
5	BCLCF102.0	Neste Oil Singapore	34.81	2013-01-17	2013-03-28	2013-12-31	HDRD
6	BCLCF102.1	Neste Oil Singapore	35.89	2013-11-12	2014-01-01	2016-09-06	HDRD
7	BCLCF102.2	Neste Oil Singapore	27.04	2016-09-07	2016-09-07	2017-12-31	HDRD
8	BCLCF102.3	Neste Oil Singapore	26.49	2017-08-15	2018-01-01	2020-12-31	HDRD
9	BCLCF103.0	Neste Oil Singapore	37.90	2013-01-17	2013-03-28	2013-12-31	HDRD
10	BCLCF103.1	Neste Oil Singapore	36.50	2013-11-21	2014-01-01	2016-09-06	HDRD

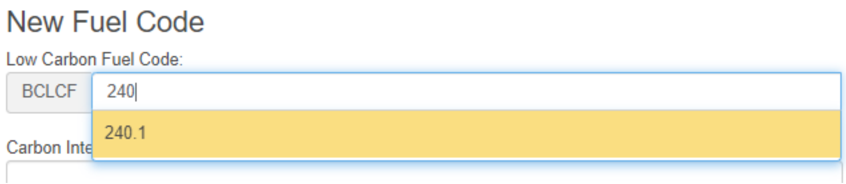
Add and Update Fuel Codes

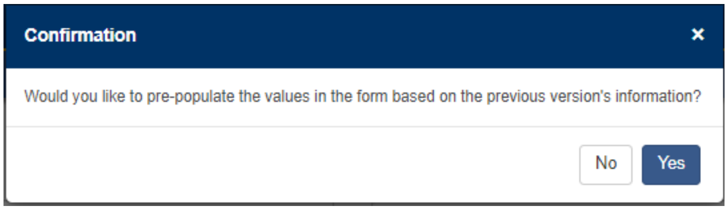
To **add** a new fuel code or fuel code version, click on the “New Fuel Code” button and enter the fuel pathway’s information into the form. The user can either save a draft version or add the new code. **Saving a draft fuel code** is used when the fuel pathway has not yet received approval from the Director; draft fuel codes will not appear in a compliance report. The **Add** button should only be used once the Director has approved the fuel pathway; approved fuel codes will appear in a compliance report (if applicable).

To **edit** an existing fuel code, select the fuel code entry from within the main fuel code table and then click on the edit button from within the fuel code details page.

Fuel Code Versions

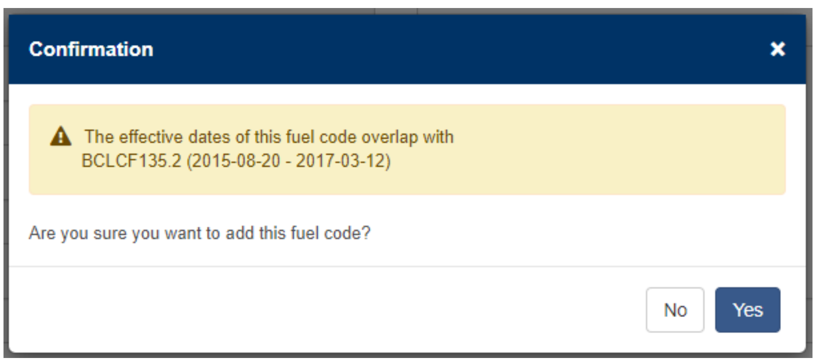
When creating a new fuel code, the analyst must enter the applicable fuel code number. For new pathways, this will be the next fuel code number available, determined by looking at the main fuel code table and last code used. For an update to an existing fuel pathway, TFRS will suggest the next fuel code version once the user has entered in the fuel code number (see the screenshot below). TFRS also prevents the user from deviating from the next version of the code in order to avoid gaps in data; the user is also given the option of prepopulating a portion of the fuel code data from the previous fuel code version.

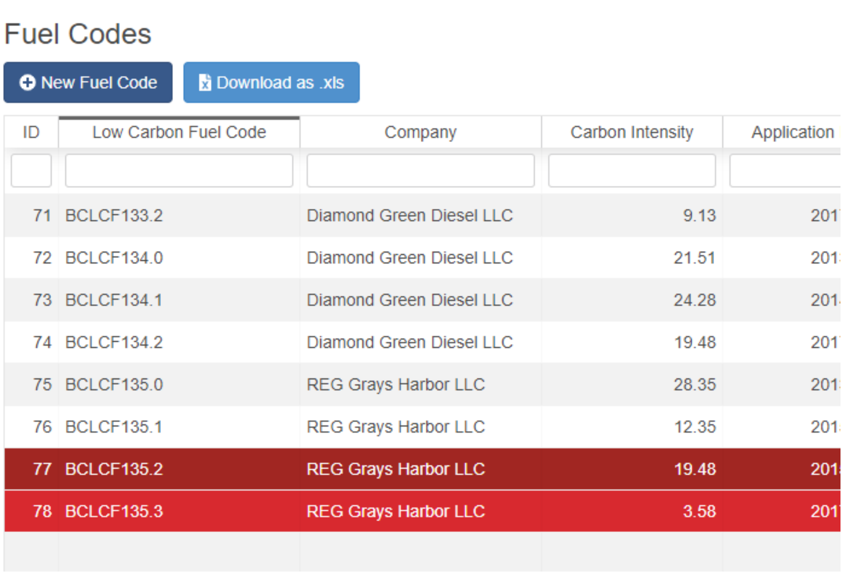




Fuel Code Effective Dates

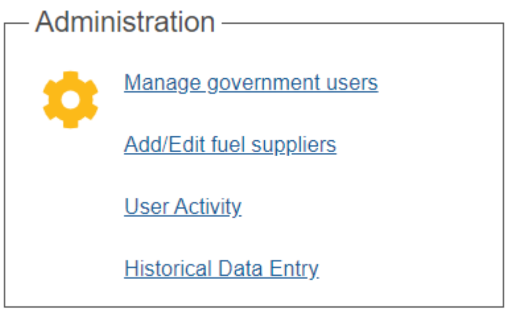
In the event that the effective date of a new fuel code version overlaps with the previous version, TFRS will alert the user by providing a warning message when the fuel code is saved as a draft or added. The two overlapping fuel codes will also be highlighted in red within the main fuel code table, as shown below.





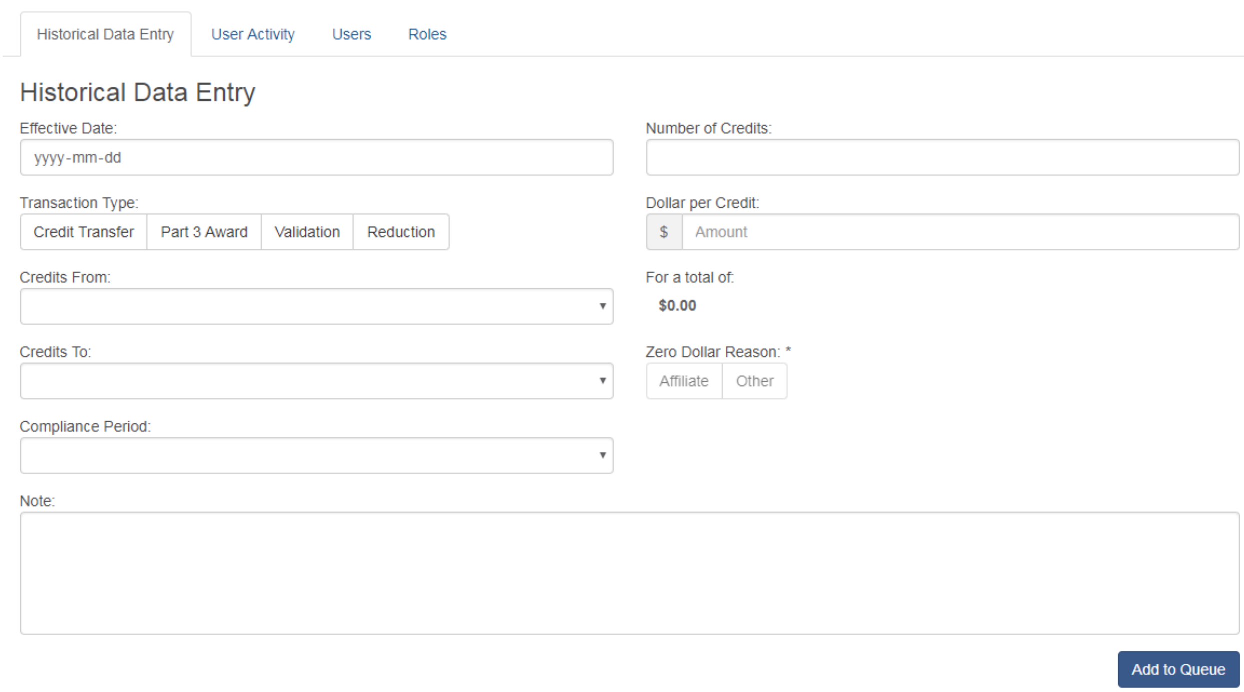
Administration

The Administration panel enables IDIR users to view/manage government users, add/edit fuel supplier organizations, view IDIR user activity, and record historical credit transactions using the Historical Data Entry feature.



Historical Data Entry

The Historical Data Entry feature allows the user to “manually” enter credit transactions (credit transfers, Part 3 awards, validations, and reductions) that have been approved outside of the TFRS application.



To record a credit transaction that has been approved by the Director outside of TFRS, enter the details of the transaction within the Historical Data Entry page. The table below provides additional information with respect to the different input fields.

	Credit Transfer	**Part 3 Award**	**Validation**	**Reduction**
Effective Date	Director's approval *or* Requested approval date	Director's approval	Director's approval	Director's approval
Transfer Type	Credit Transfer	Part 3 Award	Validation	Reduction
Credits From	The Part 3 fuel supplier who is selling or otherwise transferring credits	N/A	N/A	The Part 3 fuel supplier in which the Reduction pertains
Credits To	The Part 3 fuel supplier who is buying or otherwise acquiring credits	The Part 3 fuel supplier in which the Part 3 Award pertains	The Part 3 fuel supplier in which the Validation pertains	N/A
Compliance Period	The compliance period in which the transfer occurred (was approved)	The compliance period in which the Part 3 Award was issued	The compliance period in which the Validation relates †	The compliance period in which the Reduction relates
Number of Credits	Number of credits transferred	Number of credits awarded	Number of credits validated	Number of credits reduced
Dollar per Credit	Fair market value per credit ($CAD)	N/A	N/A	N/A
Zero Dollar Reason	If a zero dollar transfer, select reason: affiliate *or* other	N/A	N/A	N/A
Note	Ref #: XXXXXXX. *If a zero dollar transfer, and the reason selected is 'other', enter rationale for the zero dollar price (e.g. correcting fuel delivery error, etc.)*	Ref #: XXXXXXX. Awarded for the completion of Schedule B.1 milestone under YYYY P3A-18COM1.	Ref #: XXXXXXX. Validated based on compliance reporting for the YYYY compliance period.	Ref #: XXXXXXX. A reduction from applying previously validated credits to offset a net debit balance in the YYYY compliance period. *or* Ref #: XXXXXXX. A reduction from the correction of an error in the ...

† If a credit validation letter refers to more than one compliance period (i.e. a multi-year validation letter) then enter one transaction for each compliance period

Once the details of a transaction have been entered into the relevant input fields, click on the Add to Queue button. The transaction will then be added into the queue table at the bottom of the page. Queued transactions are **not visible to fuel suppliers** and can be edited or deleted by clicking on the corresponding icons on the right-hand side of the transaction entry within the queue table.

Once you have added the transaction(s) to the queue, click on the Commit button at the bottom of the page to complete the transaction. **Once committed, the transaction will be visible to fuel suppliers. Exercise caution when committing transactions as this action cannot be undone by a government user; only a developer can remove a transaction once it has been committed using this feature.**

It is strongly recommended not to leave transactions in the queue for an extended period of time. The queue is designed to allow transactions to be reviewed to ensure that there are no mistakes, and not to store "upcoming" transactions.

Once a transaction has been successfully committed, the new transaction will appear in the Credit Transactions table on the Credit Transactions page.

User Activity

The User Activity page tracks all of the actions taken by government users in TFRS. This feature ensures a level of accountability and assists in auditing.

Historical Data Entry | User Activity | Users | Roles

User Activity

User	Action Taken	Transaction ID	Initiator	Respondent	Timestamp	
Justin Lepitzki	Approved	333	Government of British Columbia	TFRS Fantastic Fuels	-	
Justin Lepitzki	Recorded	333	Government of British Columbia	TFRS Fantastic Fuels	-	
Justin Lepitzki	Approved	332	Government of British Columbia	TFRS IMBeing Green	-	
Justin Lepitzki	Reviewed	332	Government of British Columbia	TFRS IMBeing Green	-	
Justin Lepitzki	Declined	331	Government of British Columbia	TFRS IMBeing Green	-	

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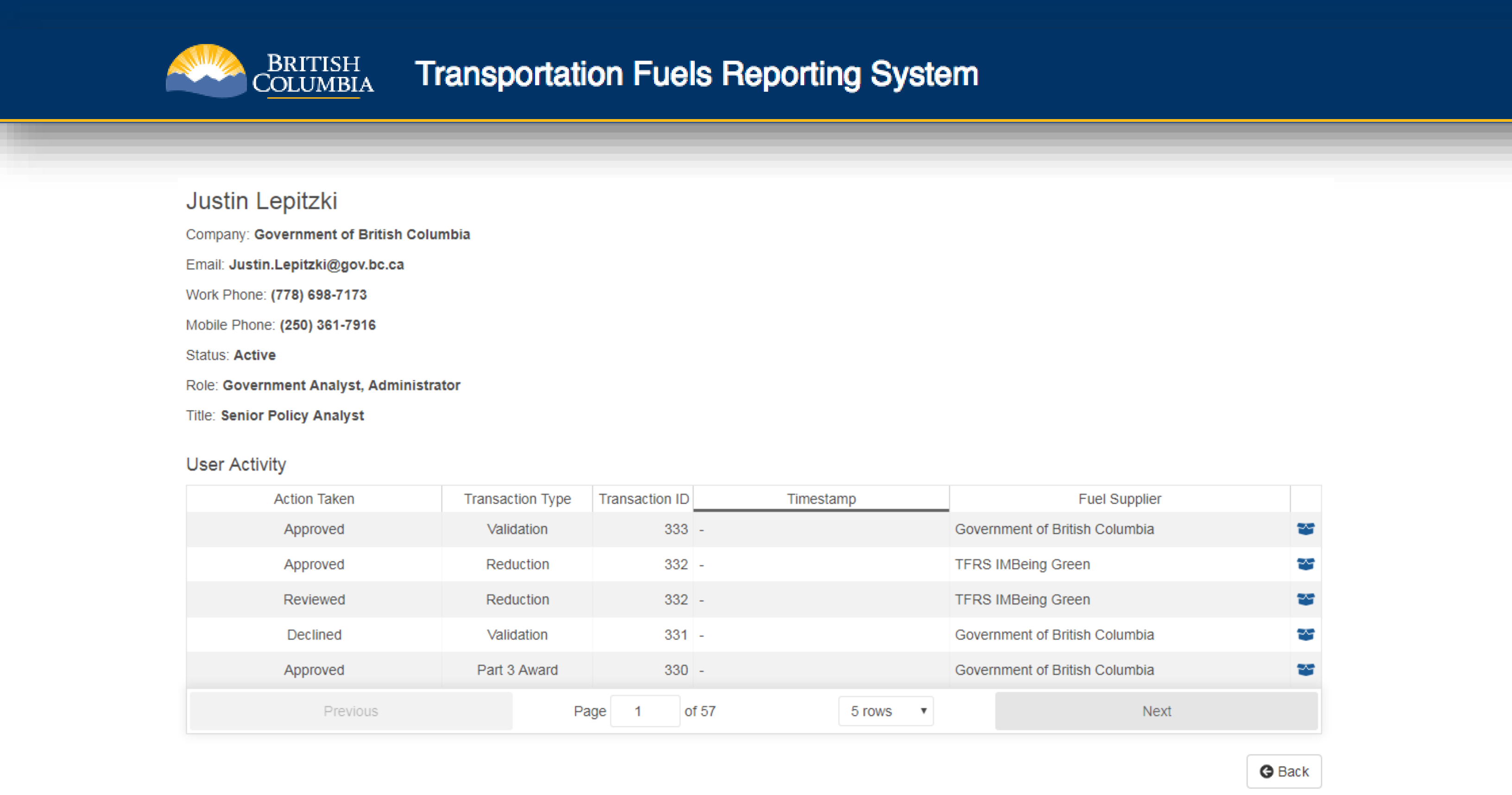
Users

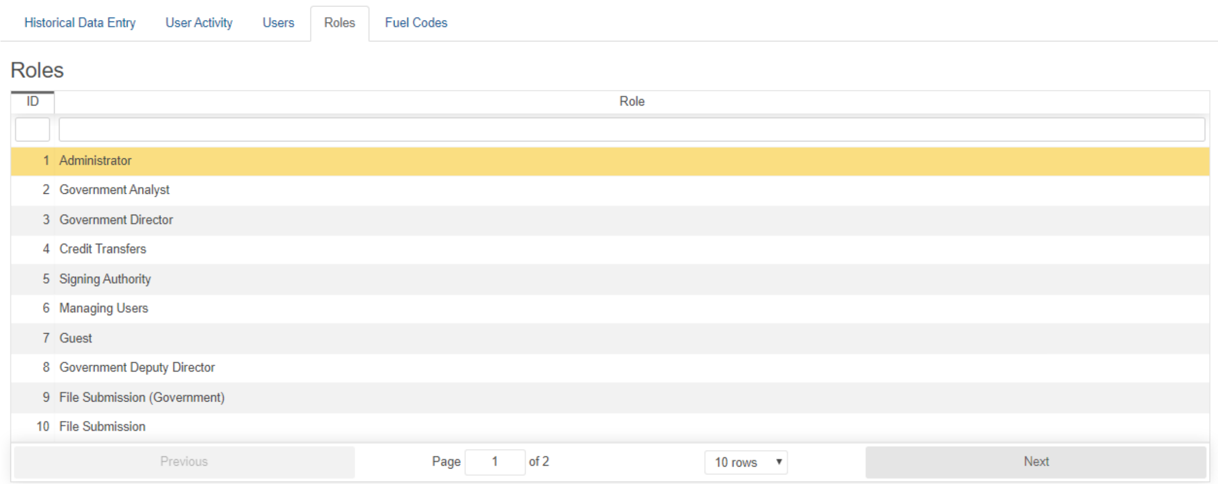
The Users table lists all the government users that have, or had, access to TFRS. A user with an **active status** is able to login to TFRS whereas a user with an **inactive status** will not be able to login to TFRS. The inactive status is used to restrict access to TFRS if a user leaves the organization or otherwise no longer requires access to TFRS.

Clicking on a user within the table will take you to the user's details page, which provides additional information about the user; the User Activity table tracks all of the actions that a particular user has taken in TFRS.



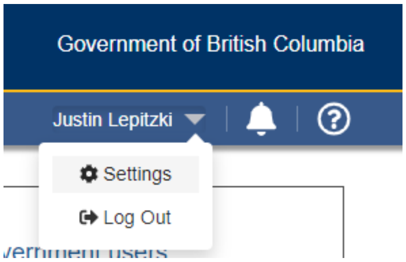
Roles

The Roles tab provides a complete list of roles in TFRS, including government and fuel supplier roles. Clicking on a particular role will show you the specific permissions that are associated with that role. A user can be granted one or more roles.



Settings

The settings page contains user-specific settings to customize additional features in TFRS.



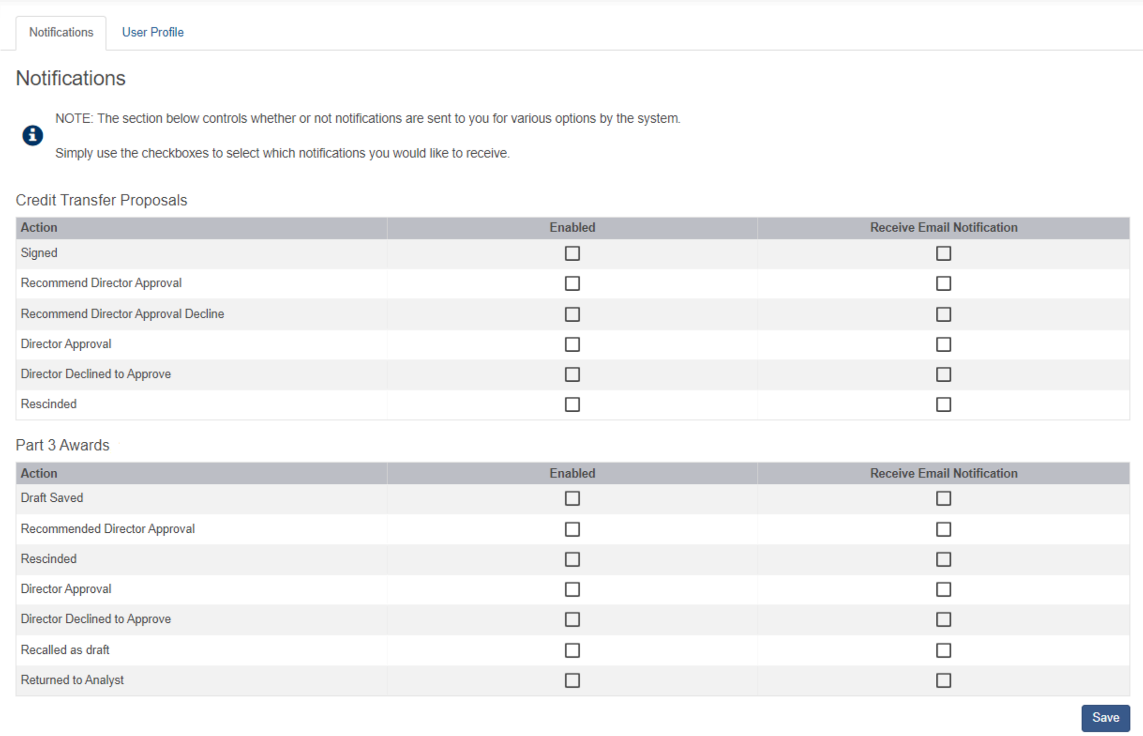
Notifications

The notifications tab allows you to customize the types of notifications you receive. This feature is user specific; meaning each user from your organization can set their own unique notification preferences.

To customize notification preferences, simply use the checkboxes to select the different actions that you want to trigger a notification. For example, selecting ‘Director Approval’ under the Credit Transfer Proposals section will trigger a notification when the Director approves a Credit Transfer Proposal.

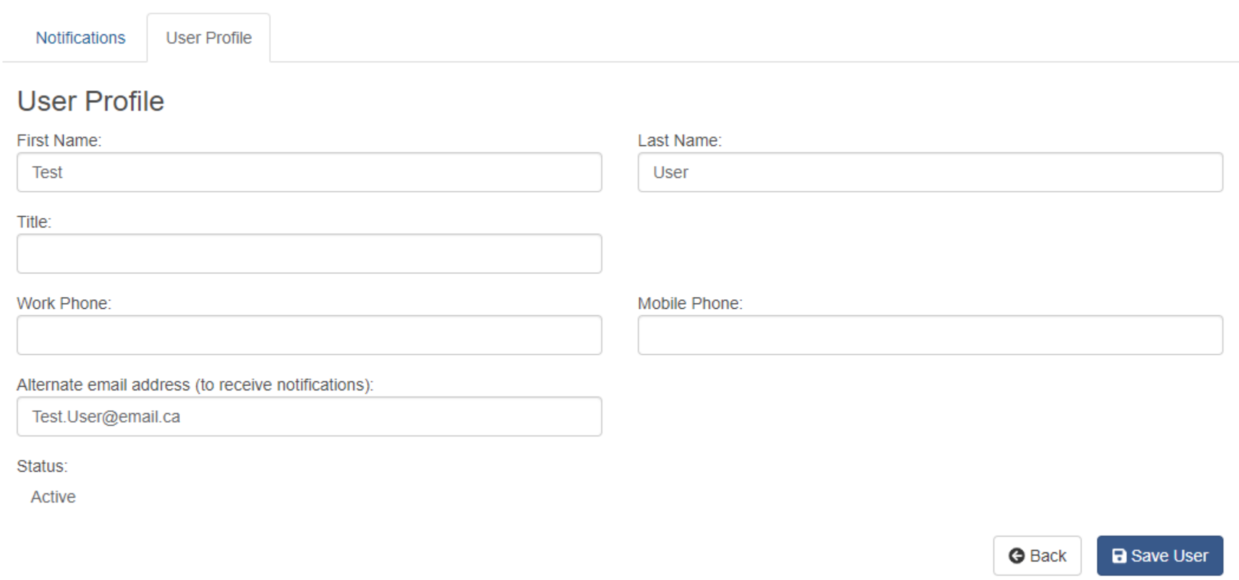
An additional feature allows notifications to be sent via email. To enable this feature, select the checkboxes under the ‘Receive Email Notification’ column. When triggered, a generic notification will be sent to the email address associated with your account. This email can be changed within the User Profile section of the Settings page (see next section for more information). Once you have selected the relevant checkboxes, then click the Save button.

In this first TFRS release, there are only four notification actions that are active; those are the ‘Director Approval’ and ‘Director Declined to Approve’ actions for ‘Credit Transfer Proposals’ and ‘Part 3 Awards’. The remaining notification actions will become active in future TFRS releases.



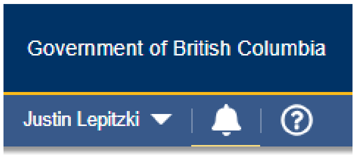
User Profile

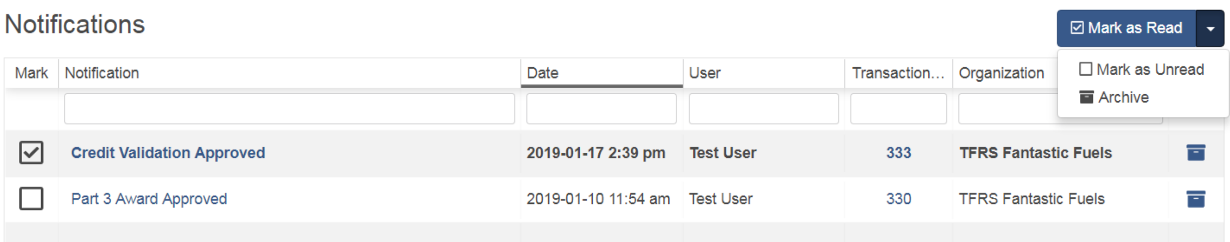
The User Profile tab allows the user to add and update relevant contact information, such as phone numbers, email, and job title. To update your information, simply type it in to the relevant field and click Save User.



Notifications:

To view your notifications, click on the bell icon in the top right-hand corner of the webpage. The number within the red circle on the bell icon indicates the number of unread notifications.





The notifications page provides a number of options to the user, including marking notifications as read/unread and archiving. **Archiving a notification entry removes it from the table; this action cannot be undone.** Clicking on a notification, such as "Credit Validation Approved", will take the user to the details page for that particular transaction and mark the notification as read.

Questions and Comments?

We are always striving to improve TFRS. Please send your questions, suggestions, and feedback to Justin Lepitzki, the Product Owner of TFRS, at Justin.Lepitzki@gov.bc.ca.

Questions about IDIR?

- Contact the 7-7000 Service Desk at 250.387.7000 or 77000@gov.bc.ca.