TRANSPORTATION FUELS REPORTING SYSTEM

IDIR USER GUIDE v1.0

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

JANUARY 24, 2019

Transportation Fuels Reporting System (TFRS) Manual

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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. Accessibility

Logging In

The TFRS web application can be accessed at https://lowcarbonfuels.gov.bc.ca, where you can log in with your IDIR.

Logging Out

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

Interpreting Button Colours

The buttons on the interface are coloured to correspond to different actions, which are shown generally below.

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):

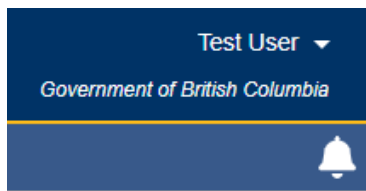| ID	Compliance Period	Type	Credits From
3		Credit Transfer	TFRS Biz Test
2		Credit Transfer	TFRS Biz Test
1	2018	Part 3 Award	N/A

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...	Value P...	Status	Last Updated On	
					Q
TFRS IMBeing Green	10,000	$164.35	Approved	2018-07-20	
TFRS Fantastic Fuels	25,000	-	Approved	2018-07-20	
TFRS Fantastic Fuels	8,000	$164.25	Approved	2018-07-20	

III. Navigating the TFRS Application

Display name and Organization

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

Test User ▾
Government of British Columbia
🔔

Credit Transactions page

Fuel Suppliers | Credit Transactions | Secure File Submission | Administration

The Credit Transactions page is the main landing page for the first release of TFRS. This page provides an overview of the credit market, including all of the historical credit transactions to-date (credit transfers, Part 3 awards, validations, reductions).

Credit Balance

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

All Organizations
Credit Balance: 2,379,086
Show transactions involving:
All Organizations ▾
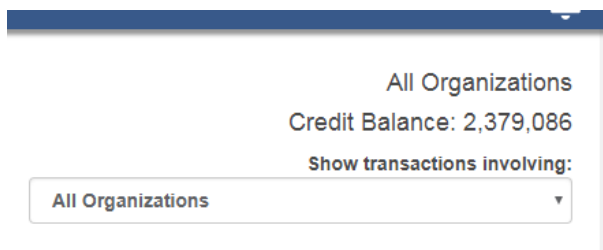
To view an individual organization's credit balance, select the organization from the drop-down menu.

TFRS Fantastic Fuels
Credit Balance: 153,997
Show transactions involving:
TFRS Fantastic Fuels ▾
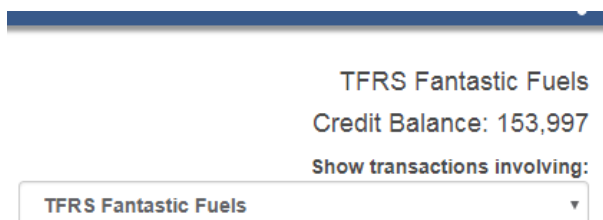
Credit Transactions Table

The main credit transactions table displays all of the historical credit transactions from all organizations, including credit transfers, Part 3 awards, validations and reductions. This table will update in real time as new credit transactions are approved or declined.

Credit Transactions

+ New Credit Transaction   📄 Download as .xls

All Organizations
Credit Balance: 2,379,086

Show transactions involving:
[All Organizations ▾]

ID	Com...	Type	Credits From	Credits To	Quantity of...	Value P...	Status	Last Updated On	
									🔍
333	2018	Validation	N/A	TFRS Fantastic Fuels	28,123	-	Approved	2019-01-17	👥
332	2017	Reduction	TFRS IMBeing Green	N/A	1	-	Approved	2019-01-10	👥

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.

Credit Transactions

+ New Credit Transaction   📄 Download as .xls

TFRS Fantastic Fuels
Credit Balance: 153,997

Show transactions involving:
[TFRS Fantastic Fuels ▾]

ID	Com...	Type	Credits From	Credits To	Quantity of...	Value P...	Status	Last Updated On	
									🔍
333	2018	Validation	N/A	TFRS Fantastic Fuels	28,123	-	Approved	2019-01-17	👥
330	2018	Part 3 Award	N/A	TFRS Fantastic Fuels	4,500	-	Approved	2019-01-10	👥
325	2018	Credit Transfer	TFRS IMBeing Green	TFRS Fantastic Fuels	12	$124.00	Approved	2018-12-14	👥

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 a designated milestone under a Part 3 Agreement.
- Validation
  - Validation of credits accrued through the supply of low carbon fuels.
- Reduction
  - A reduction in credit balance from (1) applying previously validated credits to offset a net debit balance, 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 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 (see screenshot on next page).

Validation

Draft	Reviewed	**Approved**

A **validation** of **28,123** credits earned by **TFRS Fantastic Fuels** has been **approved**, effective **January 17, 2019**.

28,123 credits

TFRS Fantastic Fuels

Validation

Transaction History

Approved on January 17, 2019 by the **Director** under the *Greenhouse Gas Reduction (Renewable and Low Carbon Fuel Requirements) Act*
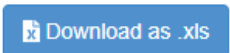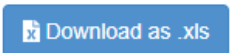
Comments

Government User	2019-01-17, 2:39 p.m. PST
Government of British Columbia	

Ref #: D1234567F. Validated based on compliance reporting for the 2018 compliance period.

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Download as .xls

The [Download as .xls] button allows the user to download the raw data in an excel spreadsheet.

New Credit Transaction

The **New Credit Transaction button** shown below is a feature that is still **under development** and **should not be used** in this first release.

Credit Transactions

All Organizations
Credit Balance: 2,379,086

Show transactions involving:

⊕ New Credit Transaction   Download as .xls

All Organizations ▼

ID	Com...	Type	Credits From	Credits To	Quantity of...	Value P...	Status	Last Updated On	
333	2018	Validation	N/A	TFRS Fantastic Fuels	28,123	-	Approved	2019-01-17	
332	2017	Reduction	TFRS IMBeing Green	N/A	1	-	Approved	2019-01-10	

Fuel Suppliers

Clicking on the Fuel Suppliers tab takes you to the complete list of recognized Part 3 fuel suppliers. This page contains each organization's credit balance, status, and last credit transaction.
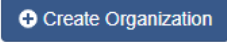
Fuel Suppliers

⊕ 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 button allows the user to create new organizations in TFRS.

An organization's status can be either active or inactive. An **active** status indicates that the organization is currently supplying fuel to British Columbia. An **inactive** status indicates that the organization supplied fuel to British Columbia in a previous compliance period, but is no longer actively supplying fuel.

An organization's status determines the **actions** that the organization is permitted to take. An active organization is permitted to buy and sell low carbon fuel credits; an inactive organization is either (1) permitted to only sell low carbon fuel credits if they have a non-zero credit balance (credits generated when they were active), or (2) not permitted to buy and sell low carbon fuel credits if they have a credit balance of zero.

Company Details

To view additional information about a specific organization, click on that organization's company name. An organization's Company Details page provides information about a company's address, status, and users.

TFRS Fantastic Fuels

Credit Balance: 153,997

Edit

Address: 123 Fuel Supplier Drive
Unit 4567
Anytown, A1A 1A1, Canada

Status: Active

Users

Name	Role(s)	Email	Phone	Status	
					🔍
Anton Coetzer	Guest	alcoetzer@outlook.com		Active	
Kailee Douglas	Guest	Kailee.Douglas@gov.bc.ca		Active	
Richard Tan	Guest	Richard.Tan@gov.bc.ca		Active	
Test User	Guest	justin.lepitzki@gmail.com	(123) 456-7890	Active	

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The **Edit** button allows the user to edit the company's details:
- Organization name
- Status
- Permitted actions
- Address

Clicking on a particular 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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Administration

The Administration tab includes information about government users and roles, and includes 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 system.

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.

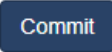|	Credit Transfer	Part 3 Award	Validation	Reduction
Effective Date	Director's approval *or* Requested approval date	Director's approval	Director's approval	Director's approval
Transfer Type	Credit Transfer	Part 3 Award	Validation	Reduction
Credits From	The Part 3 fuel supplier who is selling or otherwise 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 in the YYYY Part 3 Agreement ("project name").	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 committed.**

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 of the government users that are in 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 in the event that a particular user leaves government or otherwise no longer needs 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.

Justin Lepitzki

Company: **Government of British Columbia**

Email: **Justin.Lepitzki@gov.bc.ca**

Work Phone: **(778) 698-7173**

Mobile Phone: **(250) 361-7916**

Status: **Active**

Role: **Government Analyst, Administrator**

Title: **Senior Policy Analyst**

User Activity

Action Taken	Transaction Type	Transaction ID	Timestamp	Fuel Supplier	
Approved	Validation	333	-	Government of British Columbia	
Approved	Reduction	332	-	TFRS IMBeing Green	
Reviewed	Reduction	332	-	TFRS IMBeing Green	
Declined	Validation	331	-	Government of British Columbia	
Approved	Part 3 Award	330	-	Government of British Columbia	

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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.

Historical Data Entry   User Activity   Users   **Roles**

Roles

ID	Role	
		🔍
1	Administrator	
2	Government Analyst	
3	Government Director	
4	Credit Transfers	
5	Signing Authority	
6	Managing Users	
7	Guest	
8	Government Deputy Director	
9	Document Upload (Government)	
10	Document Upload	

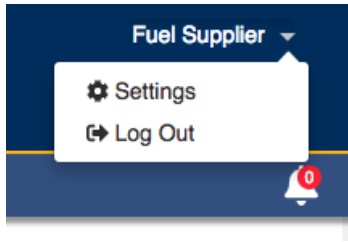| Previous	Page	1	of 1	10 rows ▾	Next

Secure File Submission

The Secure File Submission feature is still **under development** and **should not be used** in this first release of TFRS.

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 can set their own unique notification preferences. To receive notifications by email or in-app, simply use the checkboxes to select the relevant notifications you would like to receive and then click the Save button.

For this first release of TFRS, the only working notifications are the 'Director Approval' and 'Director Declined to Approve' for Credit Transfer Proposals and Part 3 Awards, Credit Validations, and Credit Reductions. The remaining notification options will become active in future TFRS releases.

User Profile

The User Profile tab within the Settings section 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.
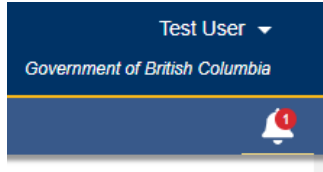
Notifications	User Profile

User Profile

First Name:
```
Test
```

Last Name:
```
User
```

BCeID Email Address:
None

Title:
```
Regulatory and Compliance Manager
```

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

Mobile Phone:
```
```

Email:
```
Test.User@email.com
```

Status:
Active

Back   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?

Questions and comments with respect to TFRS?

- Contact 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.