

1 Thank you for waiting

Our Webinar will begin shortly.....

2 House Keeping!

Welcome

- allocated two hours for this session but we anticipate it will not take more than 90 minutes.
- For the most part this webinar will be delivered in lecture mode; this will prevent any background noise or interference for those attending. Please use *6 to mute your own phone line.
- We encourage questions to be held until the end of the presentation.
- We will announce when the lines are open to ask questions.
- Alternatively you can submit your question at anytime using the LiveMeeting question and answer tool found at the top of the LiveMeeting screen. Once you select the Q&A tab you will receive a prompt “type a question for the presenter”. We will read out the questions at the end of the presentation . You may also email your questions to the Climate Action Secretariat at climateactionsecretariat@gov.bc.ca.
- All slides and Q/A will be posted on line after the session.

Who’s here

3 YERP

An Overview of our Year End Reconciliation Project

A SMARTTool Enhancement to support Year End Reporting and Prior Year Adjustments

4 What will YERP include?

1. A simplified landing page
2. An Event log with a summary of events affecting SMARTTool Data
3. An Event Detail page for each event including the complete impact of SMARTLoad and other Events
4. Improved loading validation on date ranges
5. Improved feedback page on Submit of data load

5 How will it help?

Looked at problems related to CNAR reporting and offset payments – decided we needed to:

1. Simple, uncluttered

The new landing page makes it easy to identify numbers to be reported and those to be offset

2. Transparency

improved tracking functionality to ensure understanding of the impact of a load or other event

3. Clarity

to assist reconciliation and reporting of changes to prior years

6 Definitions

Reporting Year – a calendar based year. Close off of the reporting year is not complete until Reports and Offset Payments are complete. That end date is May 15.

Current Year – this is the year it is today.

For the first 5 months of a year, the Reporting Year and the Current Year refer to different years.

After the Close off of the reporting year in May – these 2 items are the same until Jan 1.

We are now in the 2013 Calendar Year, so our Current year is 2013, however, emissions generated within 2013 are not required to be offset until the 2013 year end, in May of 2014.

7 Definitions

Prior Year Adjustment

Prior Year, refers to a reporting year which has been closed. Closing is the completion of the Reports and payment of offsets.

Adjustments to prior year are calculated from the most recent past year end. (May 2012)

Adjustments to prior years will be displayed as a separate value on all the new pages

Adjustments need to be offset by the next year end (closing) date. (May 15, 2013)

@the 2012 report closing date - May 2013 –adjustments made to 2010 or 2011 data since May 2012 will be reported and offsets on these adjustments will need to be purchased.

8 The Simplified Landing Page

When you log on to ST the, first page you will see is the new landing or home page containing the following key elements

5 key elements

1. Total Emissions for the Current Reporting Year
2. Total Emissions for Offsets for the Current Reporting Year
3. Total Emissions representing Adjustments from all Prior Reporting Years
4. Total Emissions for Offsets representing Adjustments from all Prior Reporting Years
5. Total Current Reporting Year liability for Offsets in tCO₂e. (The sum of 2 and 4 above.)

9 SAMPLE LANDING PAGE (there will be a little more text on this page than displayed)

Sample New Landing Page

1. Total Emissions for the Current Reporting Year
2. Total Emissions for Offsets for the Current Reporting Year
3. Total Emissions representing Adjustments from all Prior Reporting Years
4. Total Emissions for Offsets representing Adjustments from all Prior Reporting Years
5. Total Current Reporting Year liability for Offsets in tCO₂e. (The sum of 2 and 4 above.)

Important: Values for the “current year”; if that is different from the Current Reporting year; will not be included in the totals on this page.

Those values will display in any event which affected them, and the current year report is available through the navigation to the reports page.

10 Offset Purchase

4 – Emissions requiring offset from Prior Year Adjustments

2 - Emissions requiring offset from the Current Reporting Year (2012)

5 – Total emissions requiring offset (sum of 2 and 4)

11 Event Log

Event (Action) Definition

Event = Any activity in the system which changes the key reporting elements.

Examples of an Event –

SSBC Building Data Load

Emission Factor change

Client Data Load

building consumption estimate

estimates are triggered by a data load, and therefore will show as a subset of a data load event.

Important Historical changes and some system wide changes are difficult to track in some cases – and their availability may be limited (i.e.: historical multiple replaces of data; emission factor changes prior to 2012)

As well, configuration changes will not be captured as events at this release, we look forward to possibly being able to show them in the future – however keep in mind configuration changes do not change the key elements

12 Sample Event Log

The Reporting Unit drop down will behave the same way it does currently

There should be a filter which allows you to review events between two dates, the default view will be all events which have affected the current reporting year and key values on the new home page. Some pages will be long, therefore paging options will be available at the bottom right.

13 Event Log Summary Information

At the top of the Event log will be the summary information for your organization.

- The summary information provides current values for the “current year”; the “reporting year” and each prior year where an adjustment has occurred.
- The total emissions in the offsets column for the reporting year and any prior year adjustments represent the offset liability for the upcoming year end.
- Notice the sample displays a situation where the Current Year and the Reporting Year are different.

14 Event Log Layout

Below the summary section there will be a list of Events, starting with the most recent.

Each Event will be identified by its Type, by the name of the Actor and by the Timestamp of when the Event took place.

By default, the log will list all current events, i.e. those which have occurred from the day after year end until the present day, in reverse chronological order – newest to oldest.

For a given Event, the Total Emissions and the Total Offsets displayed will be the total for that organization after the event occurs, the most recent event displaying for the period should total the emissions and offsets displayed as “current” in the summary section above and on the landing page. Important: when the current year is different from the reporting year (as is the situation today – Jan 30, 2013); any data loaded for the “current year”, being 2013, will not be included in the landing page.

Important Click the Event Label to view the Details of this particular event.

15 Event Details

the Event Detail is a reviewable record of the impacts of the Event.

The detail for an event will clearly show where the change in emissions and in offsets came from and its impact on all years.

The sample displayed would be from a single event where stationary Light Fuel oil has been loaded for one organization with reading dates which span all or part of 3 years, for example reading start of 2011-12-15 to a reading end date of 2013-01-07

In a case where we have Start and End dates overlapping a calendar year end, we would expect the Quantity to be pro-rated into the two years

16 Improved Validation

The current system requires clients to click on the consumption source name (buildings, fleet, paper) in order to find the details of why their data was not able to be validated. The new validation brings both the summary validation information and the detail information onto a single page making corrections easier to identify.

New validation on purchase date will allow immediate acknowledgement of date ranges in the data which may result in prior year adjustments and will assist data loaders in understanding the impact of the records on prior year data. On the new combined screen, there will be a display of the total number of valid records per source and; each record, including row number which contains an error along with its appropriate error message; and each record, including row number which contains data affecting a prior year, including the earliest calendar year affected.

For clarity and to align with common standard software, the submit button has been moved to the bottom right of the page and a cancel button has been added which can be used to clear a validation and start again.

Important, the cancel button will not be functional after “submit” has been pressed.

17 Feedback on Submit Data

- The current feedback requires that you click on each source name in order to see the details of what was loaded.
- The details provided are exactly what was in the spreadsheet loaded, except for Leased Buildings, which shows the quantity of any estimated building data, from the load, broken down by month.

18 Improved Submit Feedback

- Completely revised page which will provide the same details of the impact of the load which can be found on the event detail page.
- Those loaders able to load for more than one organization and choosing to do that in a single load will see the details for all impacted organizations, however on the event detail, they will only see the data for that load which is specific to the organization report they are viewing.
- Include buildings estimates where they are triggered by the load.

19 Navigation

In order to accommodate the new pages and still maintain access to all existing pages and exports, a new navigation drop down list will be provided which will contain all of the current elements and all new pages.

20 Navigation Elements

Look for these terms in the new navigation drop down box

1. Home – access to the new SMARTTool Landing page
2. Event Log– navigation to the Event Log Summary page
3. Exports – access to the current export page and all associated exports
4. Reports – access to the former landing page, including all graphs and tables. These maintain their current functionality.
5. SMARTLoad - as with the current system, those who have access to Load data will see this in the navigation. The SMARTLoad page has not changed.
 - ❖ *Navigation to event details pages will only be through the links on the Event Log page.*

21 Summary

Talked about the 5 key elements, and where they can be found;

The new pages, validation changes and navigation.

We anticipate, and are building for, a faster load of the home page – however final improvement is difficult to quantify and is dependant on the activity on the system at any given time.

Current ETA to production is Feb 17, however this is dependent on testing.

We will do our best to update you of any changes or delays through the “Where Green Ideas Work” (SMARTTool) and the Climate Action Leaders websites.

22 Questions?