Log Exemption Information System
LEXIS 2.11

Operating Manual

(Industry Users)

Table of Contents

Background/Introduction 4

Requesting Access to LEXIS 4

User Profiles in LEXIS 5

LEXIS Provincial Submitter 5

LEXIS Application Approver 5

LEXIS Exemption Approver 5

LEXIS Read Only 5

Login into LEXIS and Electronic Submission Framework ESF 6

Application for Exemption (Provincial Submitter) 7

Apply for an Exemption Through the Surplus Test 7

Electronic Data Upload 7

Manual Data Entry 13

Edit an application before approval for advertising 27

Confirming an application has been approved 27

Offers on Advertised Applications 28

Create an offer 28

Reviewing an Offer Place or Received 33

Withdraw an Offer Placed 34

Search from Offers Placed 34

Search from Offer Search 34

Withdraw an existing Offer 36

Exemptions 40

Ministerial Order (MO) Exemptions 40

Order in Council (OIC) Exemptions - Blanket and Individual 40

Review Exemptions after Approval 41

Review Ministerial Order (MO) Exemption 41

Review Blanket Order in Council (BOIC) Exemption 43

Request for Permit 45

Overview of permit process for all exemption types 45

Permit against a Ministerial Order exemption 46

Permit tab 47

Owner/Agent tab 49

Shipping tab 49

Items tab 50

Documents tab 52
Fees tab 52
Save and Submit the Permit Request 53
Permit against a Blanket Order in Council exemption 55
Permit tab 55
Owner/Agent tab 56
Shipping tab 57
Items tab - adding the Package details 58
Documents tab 61
Fees tab 61
Save and Submit the Permit Request 62
Review and Print Approved Permit 64
Email Confirmation of Permit Approval 64
Print or Save Permit 64
Permit Fee in Lieu (FiL) and Invoice tracking on *GBMS* tab 67
Editing the Shipping Information 68

Background/Introduction

This manual is designed to provide step-by-step instructions by profile (i.e., security access level) to the Log Exemption Application System (LEXIS). There are several levels of online access in LEXIS: Provincial Submitter for industry clients, and Application Approver and Exemption Approver for staff. Each profile is assigned a view of the data.

The profile assigned to an industry client or their agent, is called Provincial Submitter and uses an individual's BCeID user ID, which is linked to the business BCeID account for a given ministry client number. A BCeID user ID may be linked to more than one client number, but each login instance will only show the exemptions/permits/offers associated with that client number. If a BCeID user ID has access to more than one client account in LEXIS, they will be required to select one at the time of login.

This manual will display screen shots taken from our test system where the data does not always reflect an actual application and the description of names, logs, values, or locations are primarily fictional.

The intention of the screen shots is to aid the reader in navigating LEXIS by highlighting the fields described as required data entry fields with the red outline of an arrow (e.g.), as well as notable bits of information with a solid colour red arrow or star (e.g.).

Requesting Access to LEXIS

In preparation for using LEXIS, the industry client must start with a business BCeID account and assign an individual user BCeID in that account to use ministry applications such as LEXIS on behalf of that company.

Additionally, the company must be assigned a ministry client number in the CLIENT system to record in the database. Many industry organizations will already have a client number and can also be used for LEXIS. However, if the client does not have a ministry number, one can be requested by providing some basic company information. Requests for a ministry client number can be sent to Provincial.Log.Export.Analyst@gov.bc.ca. See Section "Create or Search for Ministry Client Number" in this manual for more details.

An agent can also make an application for exemption on behalf of a company. This must be requested by the company working with the agent and include the agent's BCeID User ID and their contact information.

The request for access to LEXIS as a client user can be submitted by email to Provincial.Log.Export.Analyst@gov.bc.ca, or through the area/regional export officer (interior regions). Online access to LEXIS includes access to the Electronic Submission Framework (ESF) where the user may submit electronic files of the exemption application(s). Request must include the ministry client account number/name, new user's full name (or a list of people), plus each user's BCeID user ID (but not their password).

User Profiles in LEXIS

LEXIS Provincial Submitter

The Provincial Submitter profile allows the user to sign into LEXIS on behalf of an organization to request/edit exemption applications, review approved exemptions, place an offer to purchase on an advertised application, request permits, and print completed/issued permits. The Provincial Submitter profile also allows the user to upload electronic files of their LEXIS applications via logging into the Electronic Submission Framework (ESF).

LEXIS Application Approver

Most ministry export staff are assigned the profile of Application Approver which allows similar functions as the Provincial Submitter, plus the ability to approve applications for advertising, enter the minister's decisions on offers to purchase, approve permit applications, and finally, calculate and prepare invoices for the Fee In Lieu of Manufacture amounts. They also add to LEXIS any legislated individual and blanket Order in Council (OIC) exemptions issued.

LEXIS Exemption Approver

Regional Executive Directors (or their designate) are assigned the Exemption Approver profile in LEXIS and are delegated to approve all Ministerial Order exemption approvals on behalf of the Minister.

LEXIS Read Only

This role is currently under development. More to come later.

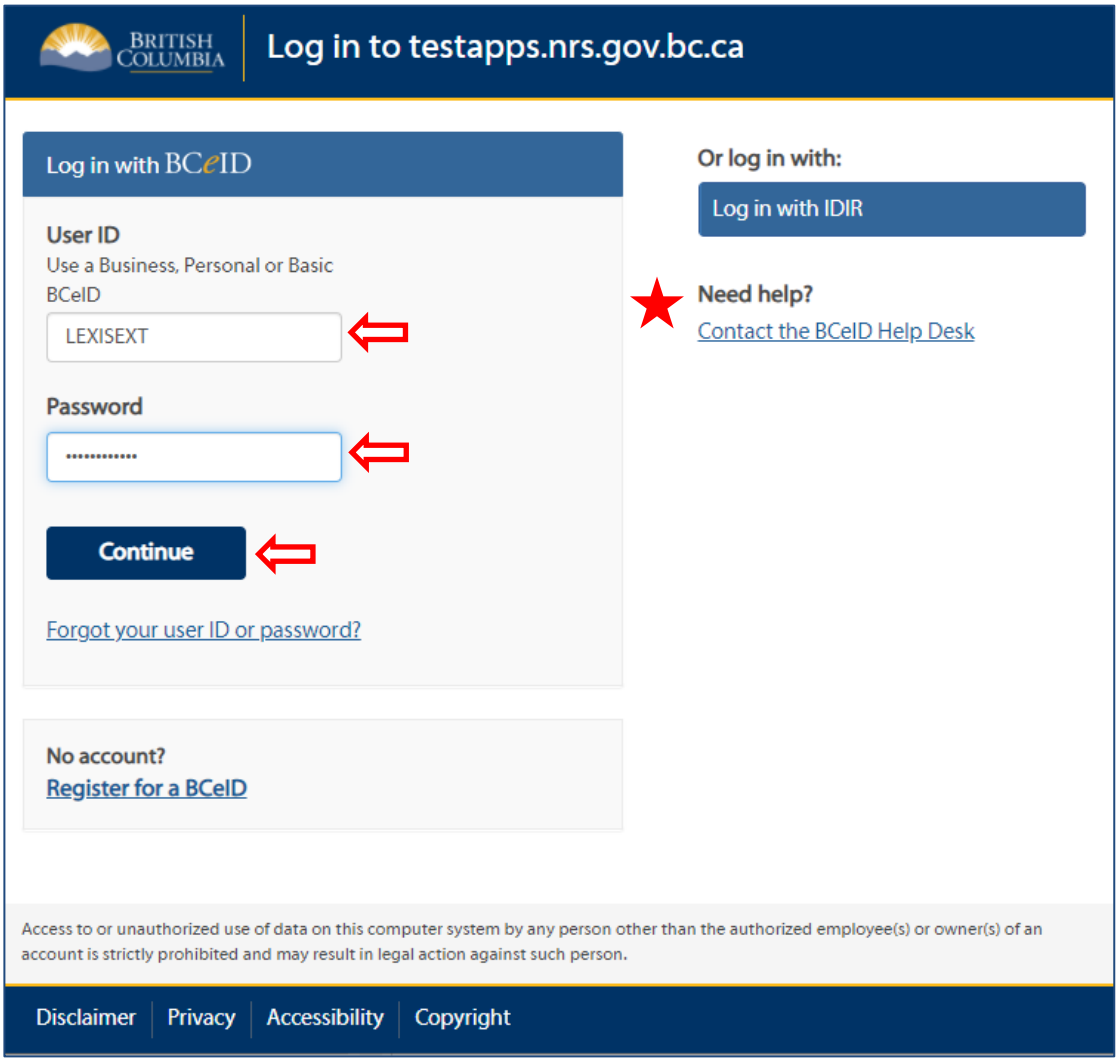
See section "Setting up Access to LEXIS" in this manual for the procedure to implement a client or staff request for access to LEXIS.

Login into LEXIS and Electronic Submission Framework ESF

To login to LEXIS, go to https://apps.nrs.gov.bc.ca/ext/lexis/showWelcome.do.

For ESF, go to https://apps.nrs.gov.bc.ca/ext/esf/submissionWelcome.do. A window will open where the user can login using their BCeID User ID and password and then selecting the Continue button.

If you forget your BCeID User ID or password for either system, you will need to contact the BCeID Help Desk, and a link is provided on the same screen.



A successful login to LEXIS will open to the *Provincial - Summary* page. This is the 'home' screen. From here you will be able to navigate LEXIS either using the LEXIS Menu on the left-hand side, or directly access your applications/offers/exemptions/permits by scrolling through the various tables shown on the page.

A successful login to ESF will open to the 'Electronic Submission – Welcome' page. From here, it is possible to upload your LEXIS XML files and search for files to monitor their status.

Application for Exemption (Provincial Submitter)

Applications for an exemption to transport unmanufactured timber can be submitted directly in the Log Exemption Information System (LEXIS), or XML file submissions can be uploaded using the Electronic Submission Framework (ESF) interface. Either way, only applications for surplus timber are posted on the Weekly Advertising List, versus applications for specialty timber where the application is reviewed by the Timber Export Advisory Committee (TEAC).

Apply for an Exemption Through the Surplus Test

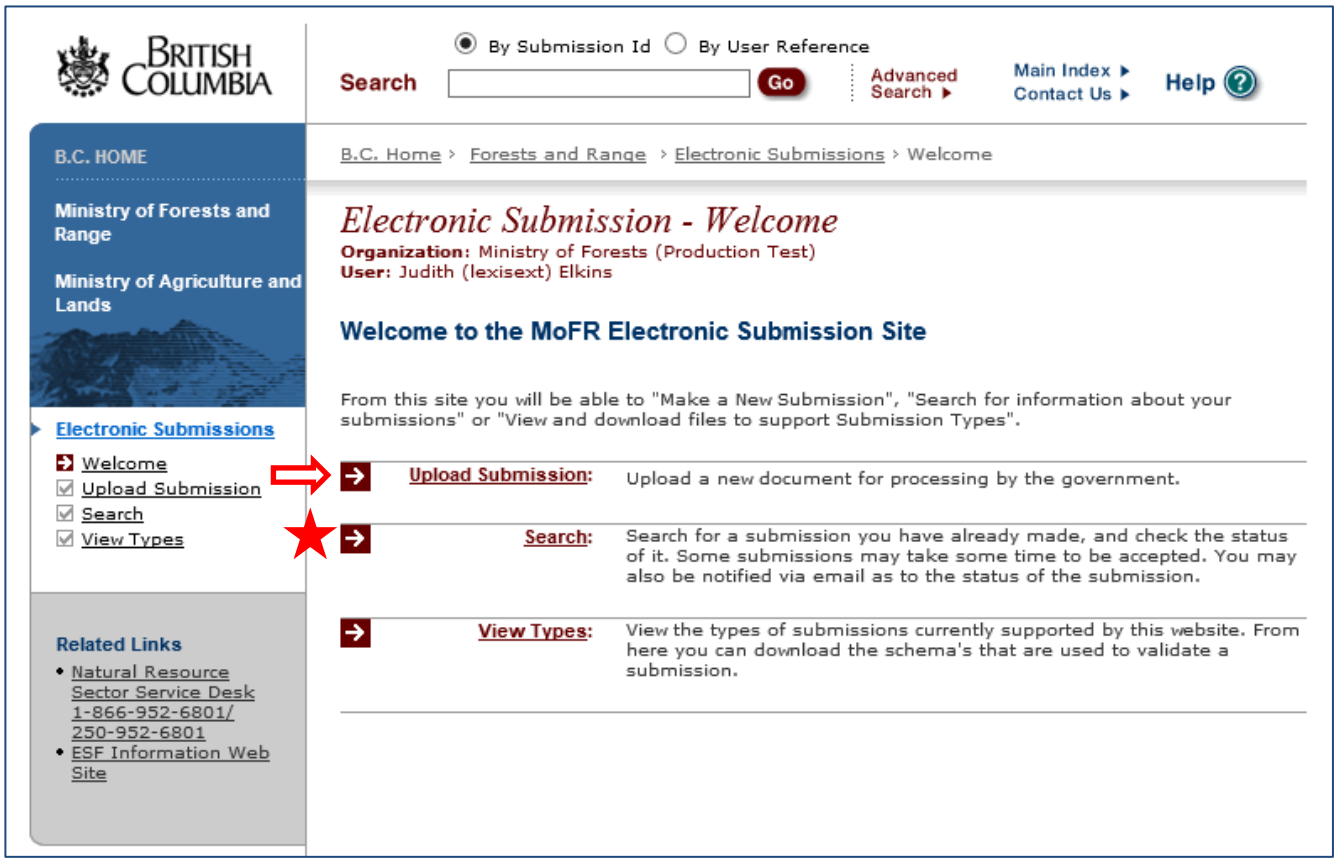
Applications for Exemption can be entered in LEXIS either by manual data entry, or via electronic data upload using a ministry online application called Electronic Submission Framework (ESF).

Electronic Data Upload

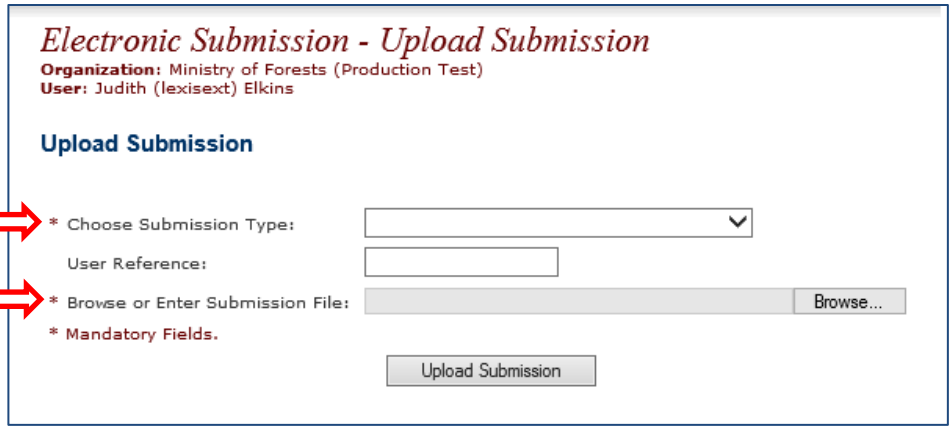
Login to ESF using a the same BCeID User Id and password used for LEXIS on the 'Electronic Submission – Welcome' page. From here, users can upload the LEXIS XML files and search for files to monitor their status. There is a specific format to be followed when uploading an XML file with a LEXIS application for exemption.

**Note that as of the release of LEXIS 2.11, the schema has been updated to LEXIS Schema 3 and all XML coding should be updated to reflect that change.

For more details or if you have questions, please contact your area export officer or the Provincial Log Export Analyst for further assistance.

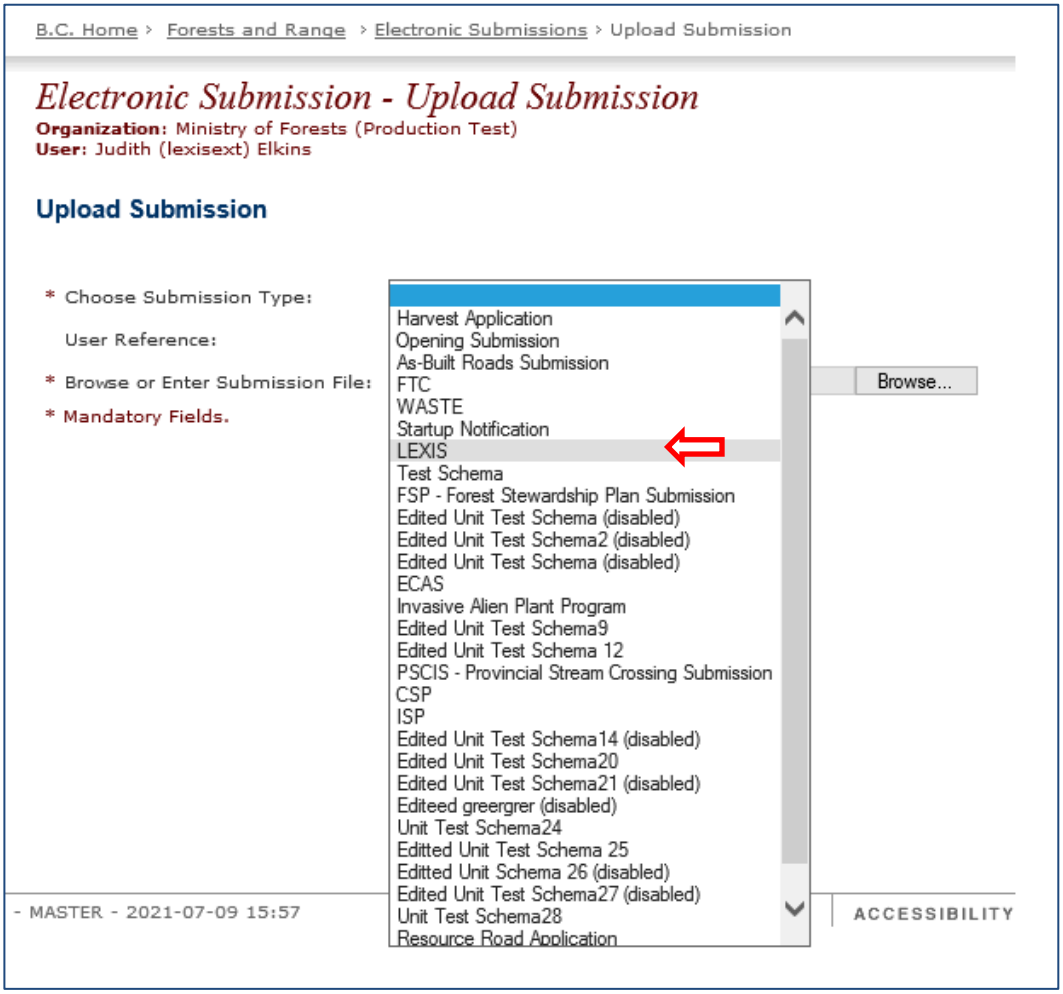


To upload a new XML file, select Upload Submission and the page will refresh to:



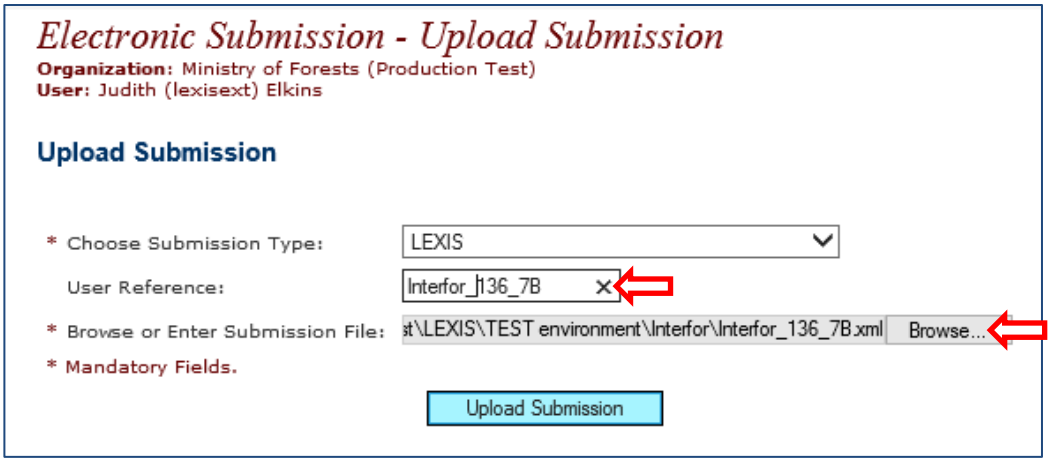
It is mandatory to choose a Submission Type, as well as select a file.

First, select LEXIS as the Submission Type from the dropdown menu.



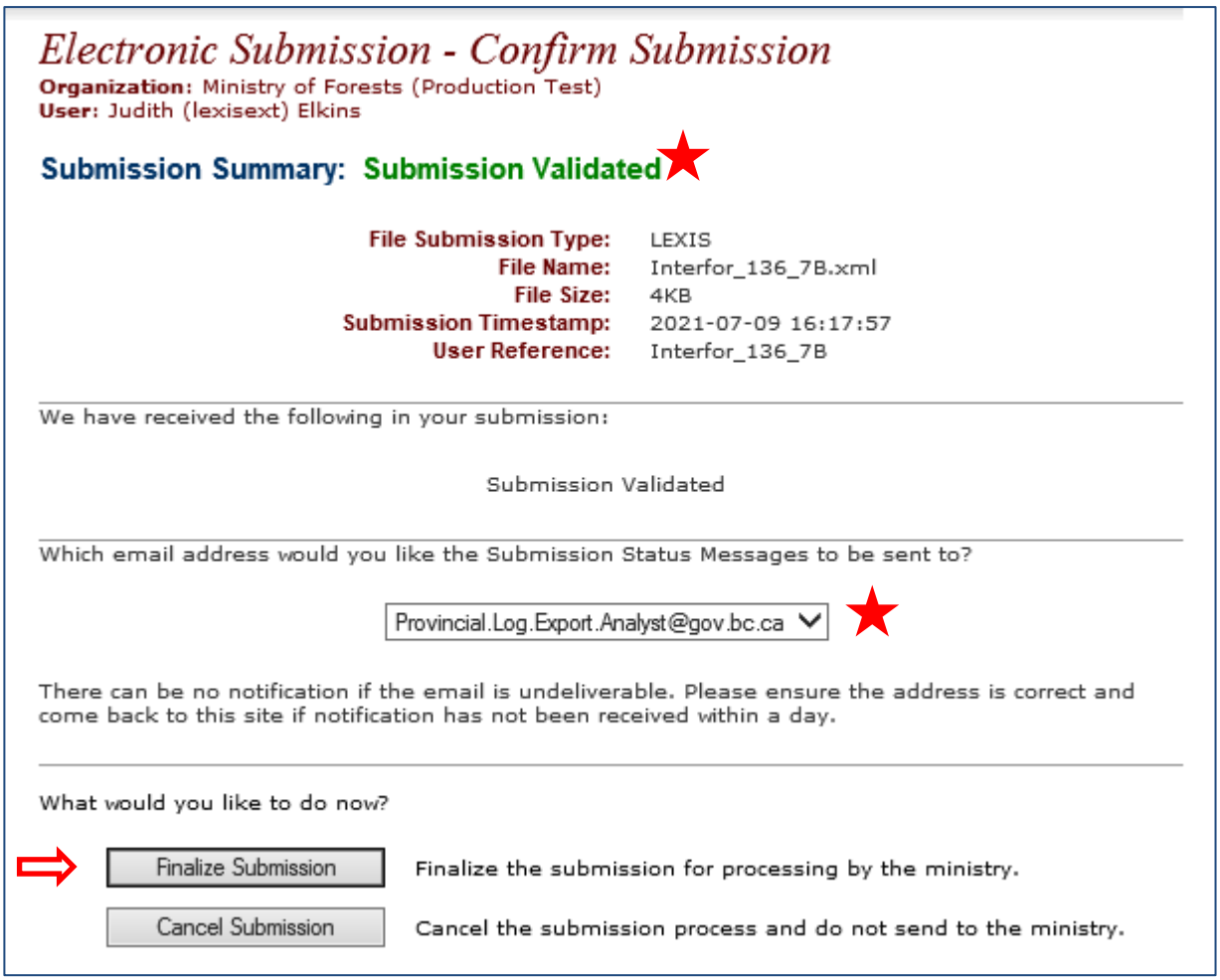
Next, select the Browse button to identify your XML file. A new window will open for the user to find and select the file from their files.

Note there is an option to add a reference name/number for your file in the User Reference field.

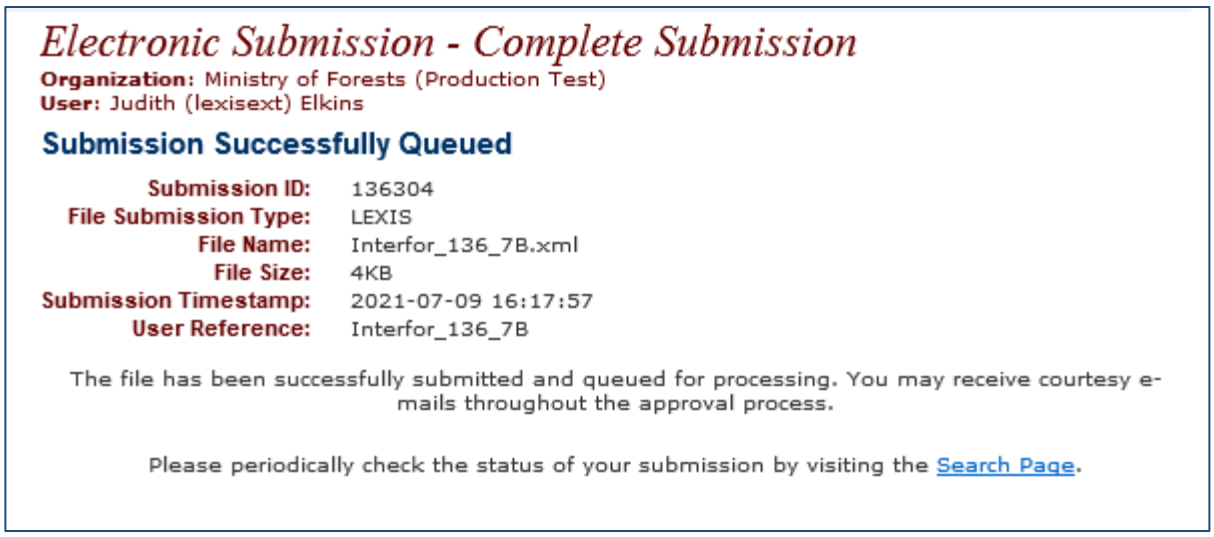


When satisfied with your entries, select the Upload Submission button. The system will immediately check the file and confirm whether the submission has been validated or not. Please check the email address you'd like the status messages sent to and change if not.

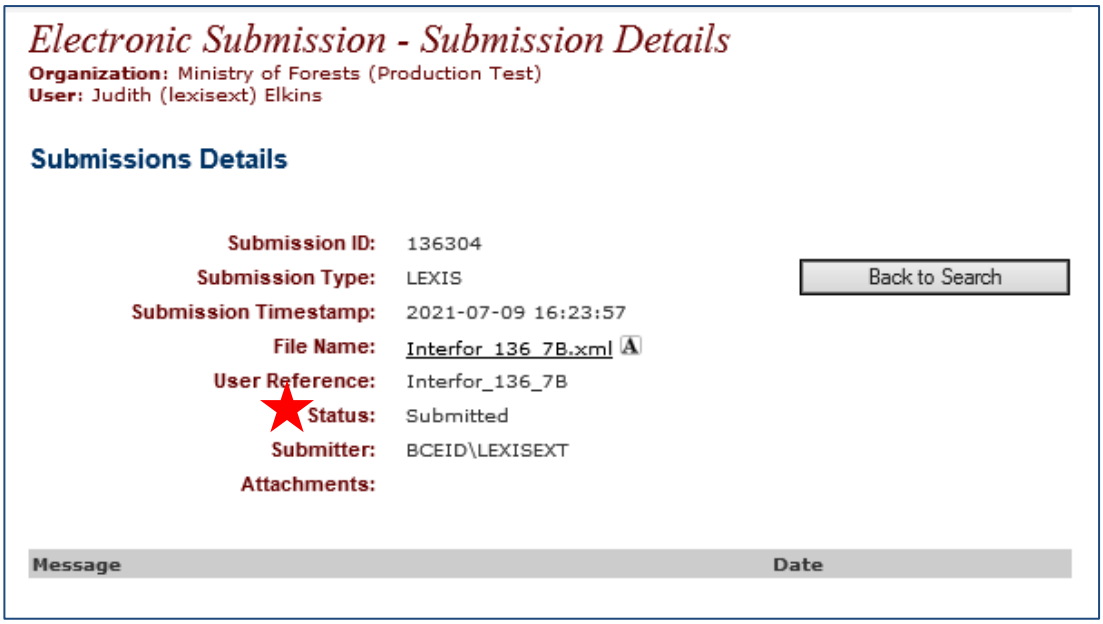
If you are happy with everything, you must select the Finalize Submission button next.



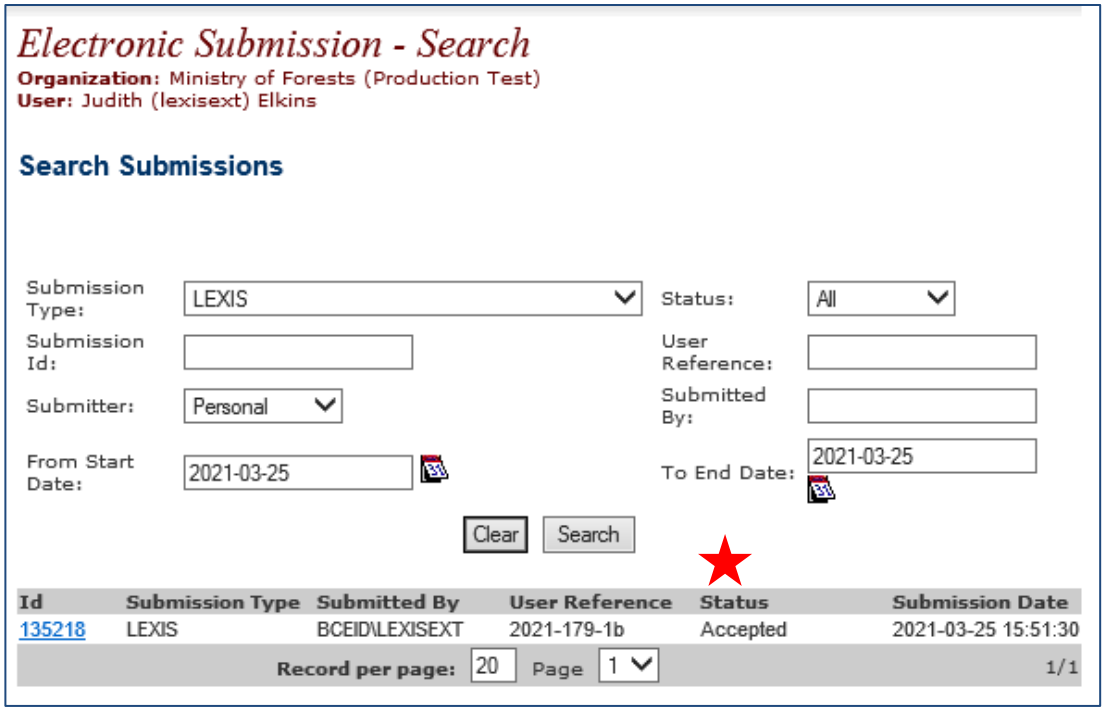
The file has now been successfully queued for processing but is not finished yet.



If you check the Search Page at this point, it will likely confirm the file has been submitted. This means the system is working on it but not yet successfully transmitted it. The status field confirms this.

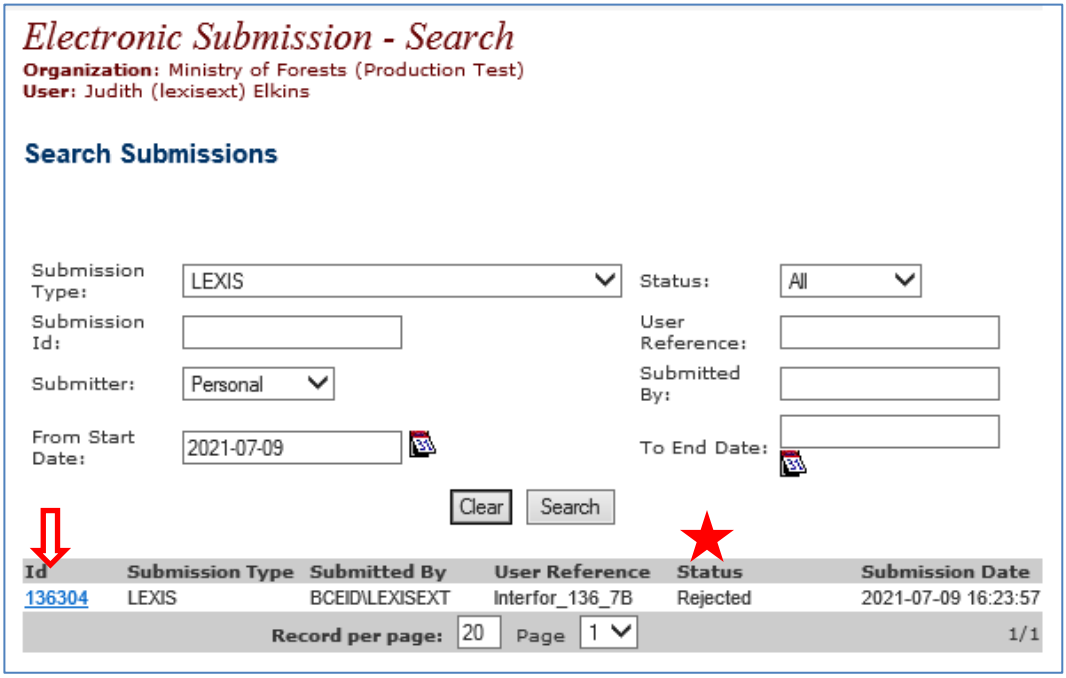


When completed, the status should be Accepted.

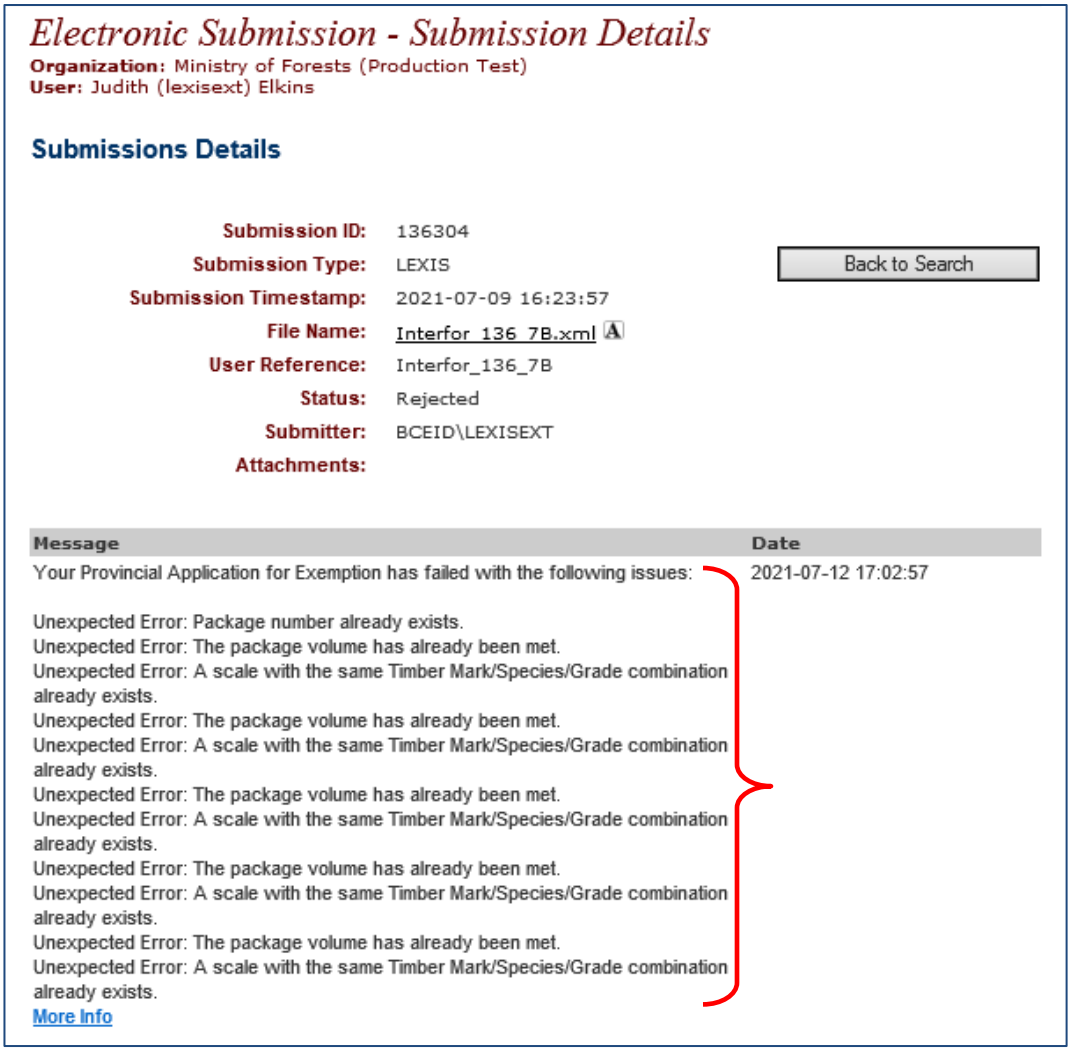


If there is a problem the status will change to Rejected and a reason given. The reason for rejection can be obtained by selecting the blue ID number to open it. It will also be included in the email notification sent to the submitter.

The notification will advise either success or failure of the file upload. It is important to confirm the file was successfully uploaded, and the email notification will do that for you. It will also confirm the Application Number assigned in LEXIS. Alternately, you can check all files and their status in ESF using the Search function, or by logging into LEXIS to make sure all files are listed.



In the example shown below, the error is that the Package Number is a duplicate, including each line in the Summary of Scale. The file would need to be resubmitted with corrections.



Electronic Submission - Submission Details

Organization: Ministry of Forests (Production Test)
User: Judith (lexisext) Elkins

Submissions Details

Submission ID:	136304
Submission Type:	LEXIS
Submission Timestamp:	2021-07-09 16:23:57
File Name:	Interfor_136_7B.xml
User Reference:	Interfor_136_7B
Status:	Rejected
Submitter:	BCEID\LEXISEXT
Attachments:	

Back to Search

Message	Date
Your Provincial Application for Exemption has failed with the following issues: Unexpected Error: Package number already exists. Unexpected Error: The package volume has already been met. Unexpected Error: A scale with the same Timber Mark/Species/Grade combination already exists. Unexpected Error: The package volume has already been met. Unexpected Error: A scale with the same Timber Mark/Species/Grade combination already exists. Unexpected Error: The package volume has already been met. Unexpected Error: A scale with the same Timber Mark/Species/Grade combination already exists. Unexpected Error: The package volume has already been met. Unexpected Error: A scale with the same Timber Mark/Species/Grade combination already exists. Unexpected Error: The package volume has already been met. Unexpected Error: A scale with the same Timber Mark/Species/Grade combination already exists. More Info	2021-07-12 17:02:57

Examples of other potential reasons for rejection/failure include (but not limited to):

- a non-valid timber mark for the given BC forest region
- timber mark is not found as a valid (provincial) timber mark
- submitter is not permitted to submit on behalf of another client
- the application volume must be greater than or equal to 0
- product detail species end use sort code is not a valid value for the given BC forest region
- description is longer than maximum length allowed for 'lexis: productLocation'

Explanations are usually self-explanatory (albeit not always in plain language), however, please feel free to contact the Provincial Log export Analyst with any questions/concerns – phone: (778) 974-2460 or provincial.log.export.analyst@gov.bc.ca.

Manual Data Entry

To manually create a new application for exemption, login to LEXIS using your BCeID User ID and password. Select *Create/Edit Application* in the left-hand navigation pane from your home page.

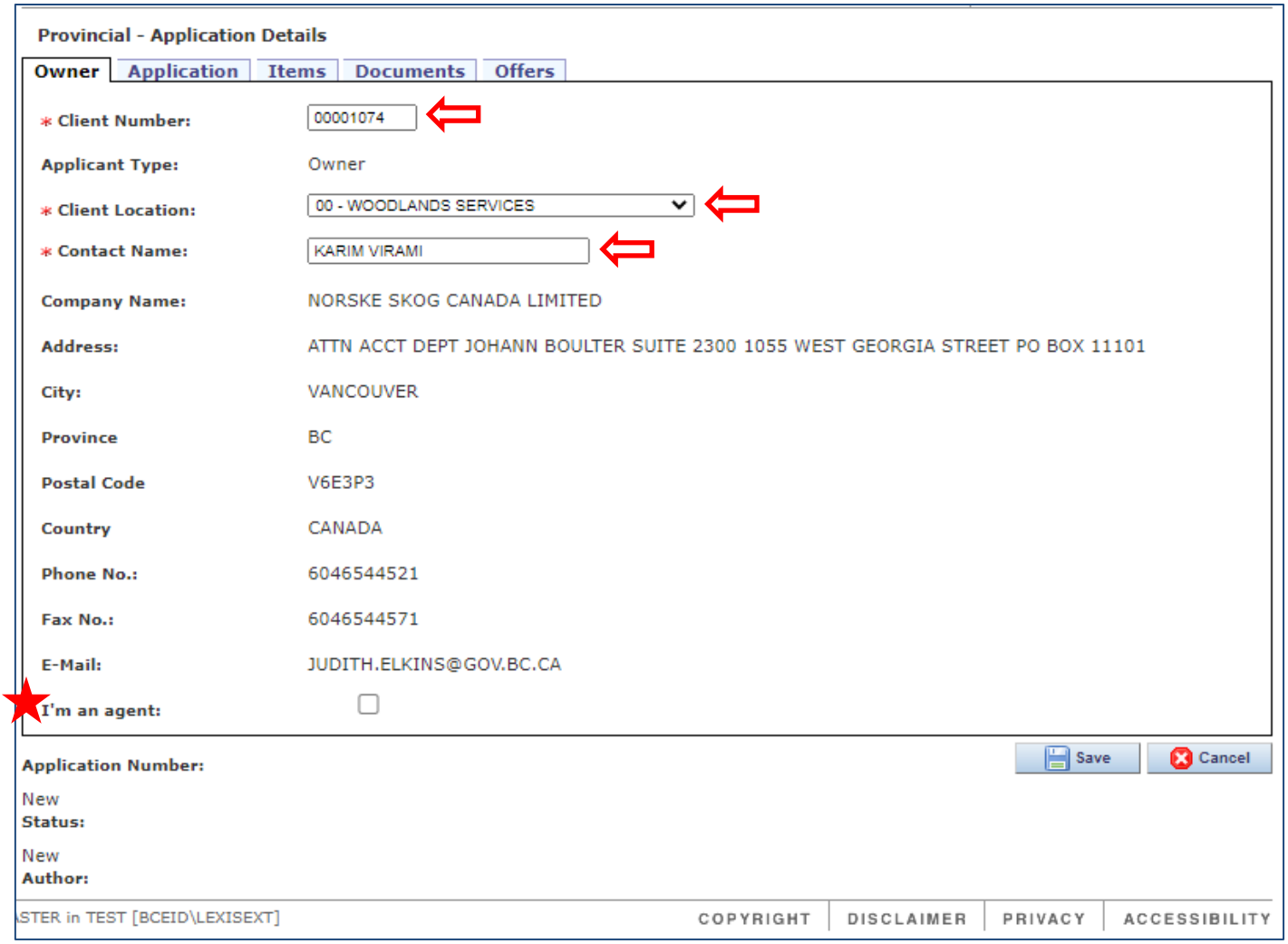
This will direct you to the *Provincial – Application Details* screen. The application can be navigated by clicking on the tab names *Owner/Agent, Application, Items, Documents* and *Offers*.

Owner/Agent tabs

Based on the login information, the client name/number will auto-fill on the *Owner* tab, including the first Client Location code and corresponding Contact Name. Using the dropdown menu select the correct Client Location (if more than one is available), and the complete the Contact Name, as necessary. The selected Contact Name will appear on the published Advertising List.

If you are an agent acting on behalf of the owner of the timber, select the *I'm an agent* tick box and the *Agent* tab will appear next to the *Owner* tab for completion. Your company info will also auto-populate on the *Agent* tab, so you must return to the *Owner* tab and enter the correct Client Number, Client Location and Contact Name, as this will appear on the Advertising List.

If there is no agent acting on behalf of the owner of the timber, the owner is the 'applicant'.



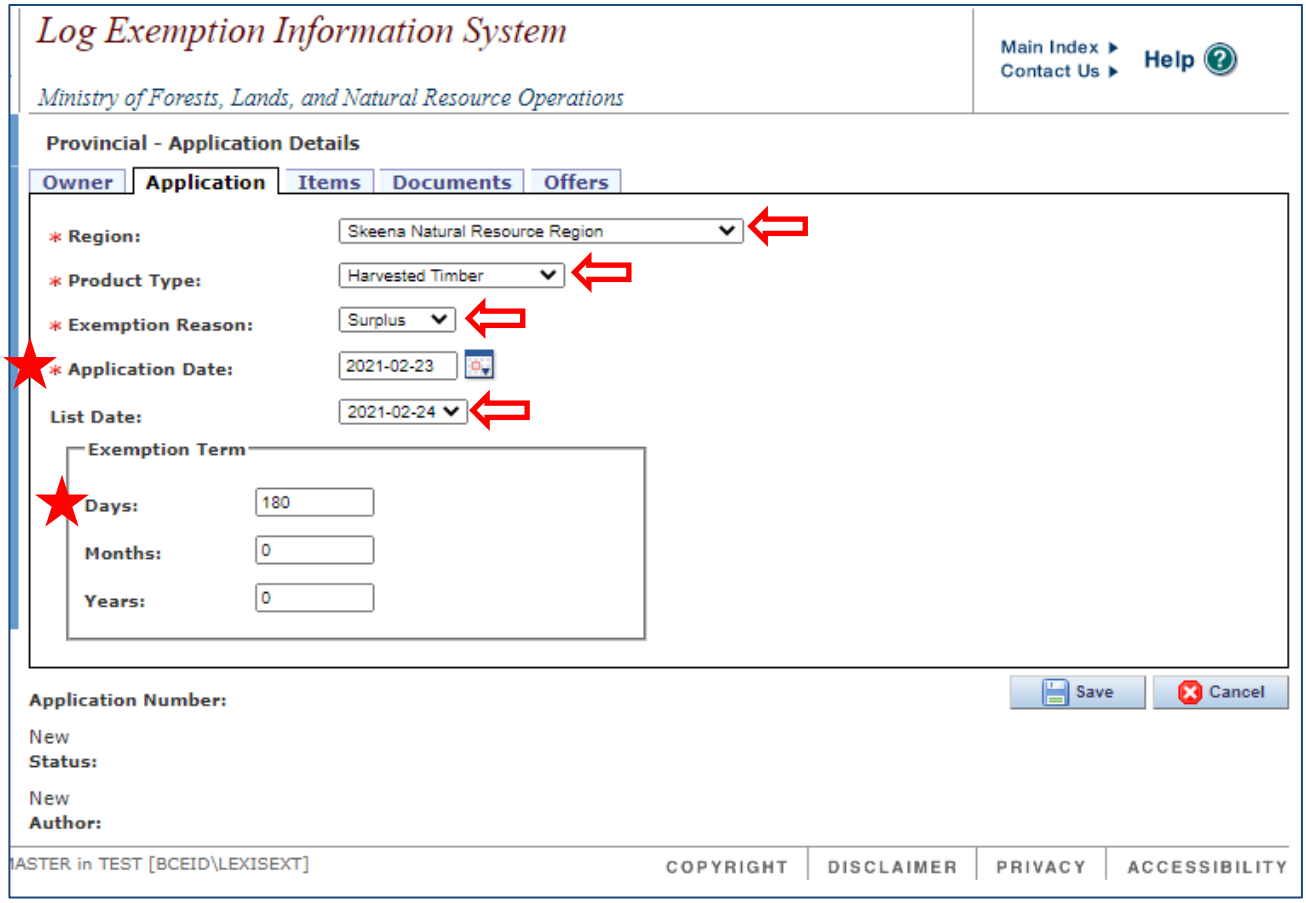
Application tab

User must enter the mandatory information for each field under the *Application* tab:

- *Region* selected from the dropdown must be the region where the logs were harvested, regions are stored alphabetically
- *Product Type* will default to Harvested (selection of Standing, Unmanufactured also on dropdown)
- *Exemption Reason* will default to Surplus for all advertised logs (selection of Economic, Utilization also on dropdown)
- *Application Date* will default to today's date
- *List Date* dropdown offers the choice of two future Weekly List dates but defaults to the next available list date

Note: the *Exemption Term* will default to the six-months or 180 days. This is considered ample time before the exemption expires to obtain both a provincial and federal export permit and arrange transportation of the timber to the border for export.

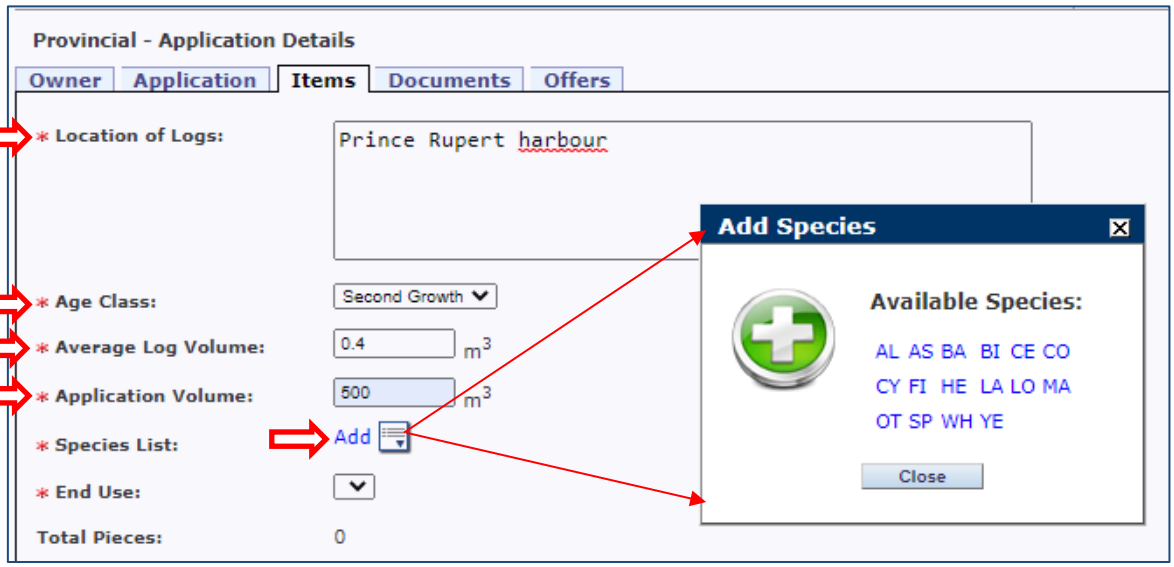
Client view:



Items tab

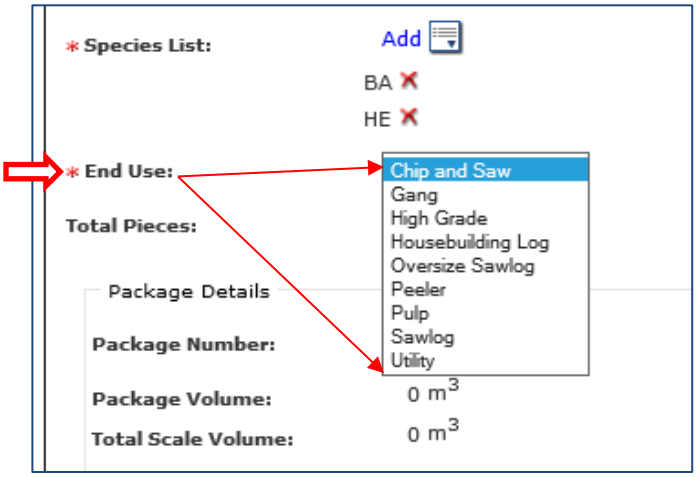
User must enter mandatory information under the *items* tab:

- An accurate description of the *Location of Logs* (up to 250 characters)
- Select the *Age Class* from the dropdown choices of Old or Second Growth
- *Average Log Volume* as cubic metres (m^3), system will round to one decimal point
- Total *Application Volume* as cubic metres (m^3), system will round to one decimal point



- For Species List, selecting the *Add* button will open a new window to list the species options that are based on the region selected for this application, displaying all allowed combinations for the area

- Select each species code, one at a time, closing the window when all that apply have been selected
- Based on the region and species selected, the dropdown for *End Use* will list the allowable options, where the user must select the most appropriate End Use



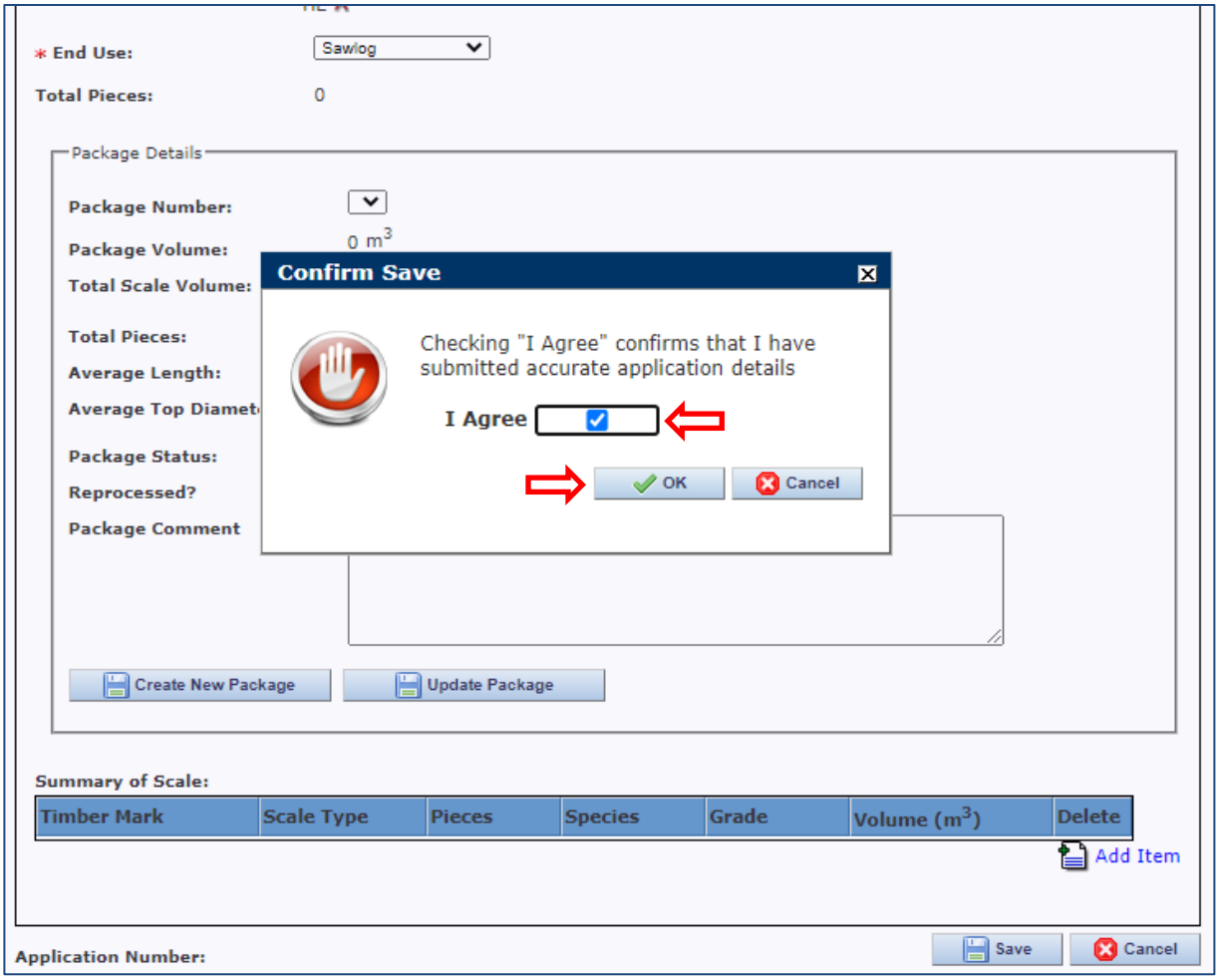
- Total Pieces is a system-generated display of the cumulative number of pieces from all packages in the application and will display after scale items are entered

Save the Application

The application must be saved at this point, allowing the Application Number to be automatically assigned before the user enters the package/scale data.

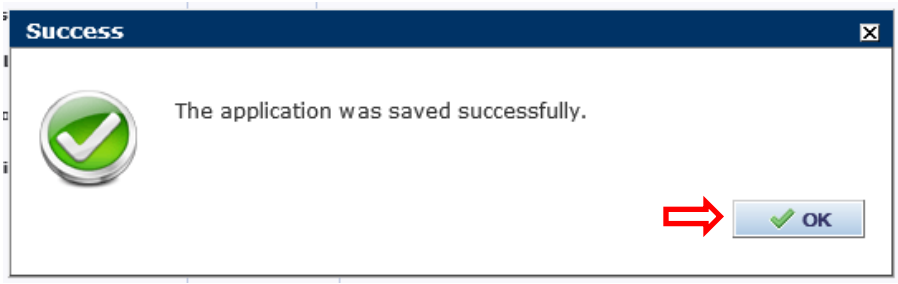
Select the *Save* button located at the bottom right corner of the window. Selecting the Cancel button will delete all previously entered data and not assign an application number.

A new window will open asking you to confirm you have submitted the necessary information. After selecting the tick box, select the OK button to close the window. An application number cannot be assigned and saved unless this is agreed to.



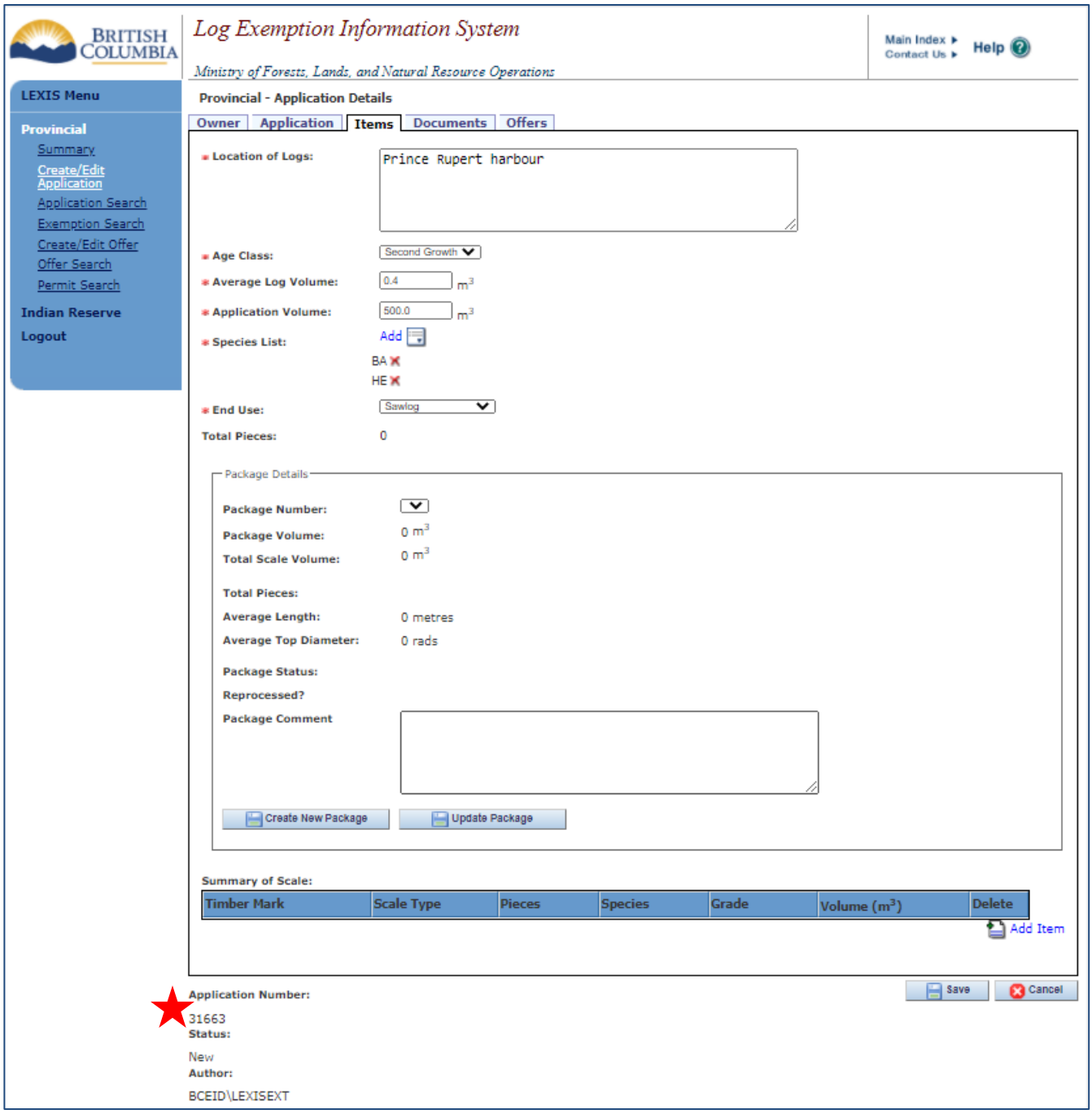
That window will close, and a new window will open to confirm the save.

Select the OK button to close this window.



FYI - Selecting the Cancel button will close the small window, not save anything, and return to the open/unsaved application. The user may then edit the application before saving once again.

The Save function triggers the system to assign an *Application Number* as the screen refreshes and will allow package/boom details to be added in the lower portion of the screen, as necessary (e.g., coastal applications).



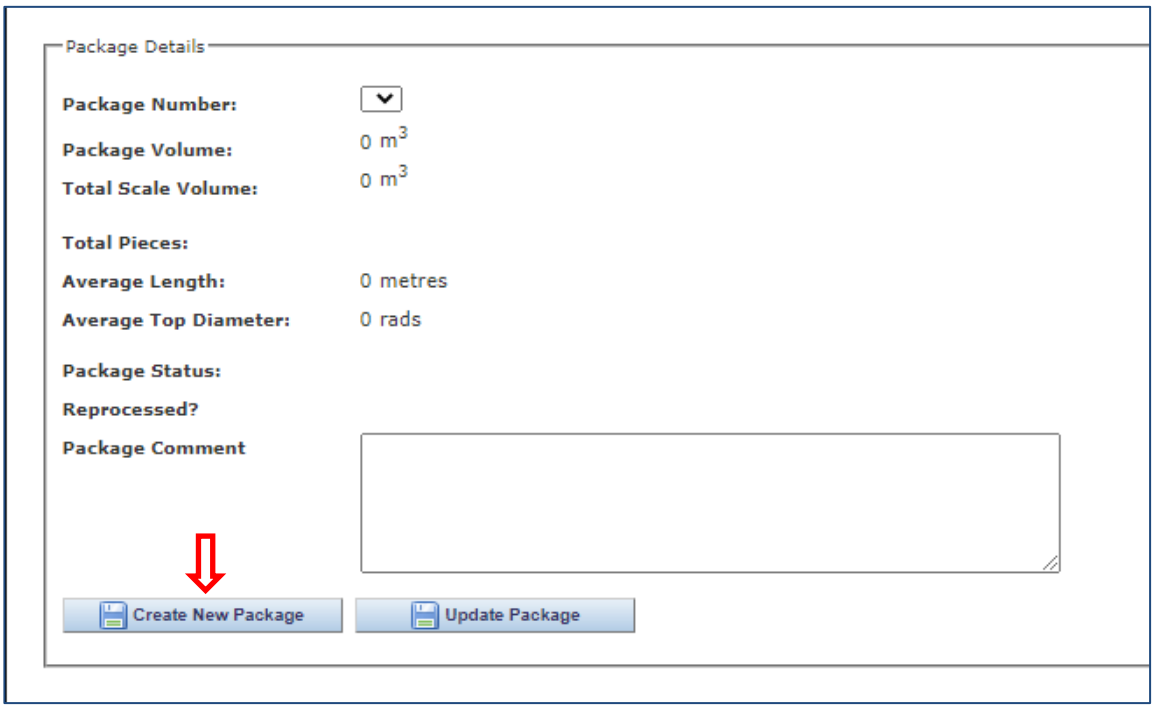
Add Package Details and Summary of Scale

In the coastal areas, operational guidelines require the timber to be scaled before advertising on applications for harvested timber. When advertising, each application may only contain one package.

Applications made from within the interior area do not require package and scale details at the time of advertising as harvesting may not be complete but will be required when the permit is requested.

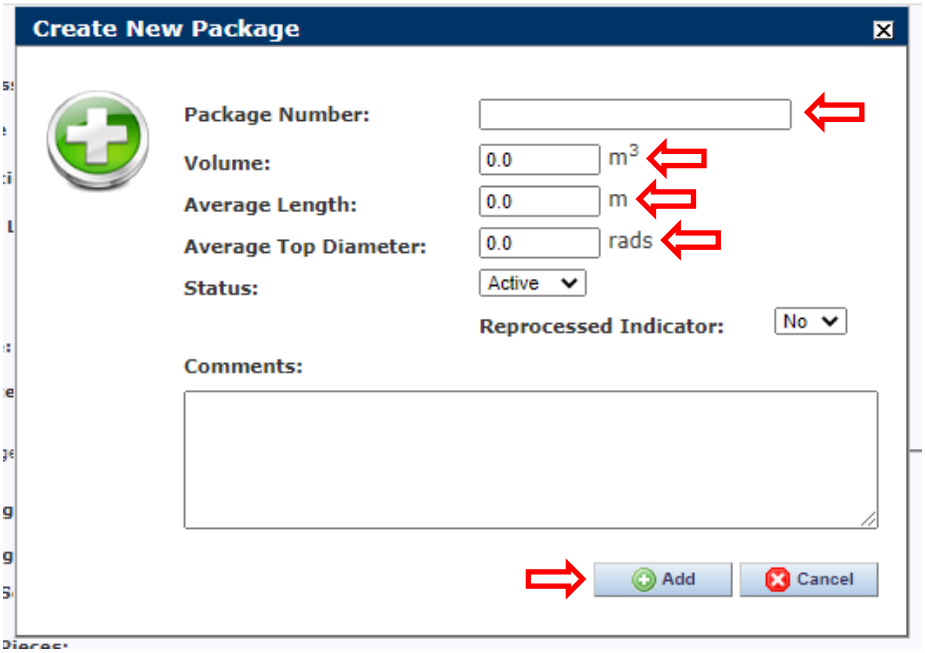
The total volume of a package must not exceed the volume requested in the exemption application. Correspondingly, the total volume of the Summary of Scale in a package must not exceed the stated package volume.

To add package details, click on *Create New Package* button.

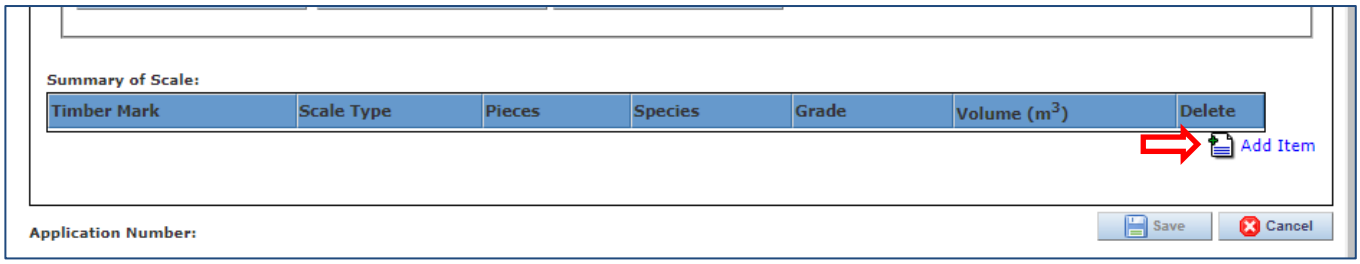


A small window will open to enter information about the whole package, usually supplied with the Summary of Scale information:

- Package Number – must be unique, can be up to 20 characters long
- Volume – total volume for the package, in cubic metres (m^3)
- Average Length – average log length for the package, in metres
- Average Top Diameter – average top diameter for the package, in rads
- Status and Reprocessed Indicator fields should remain as they are

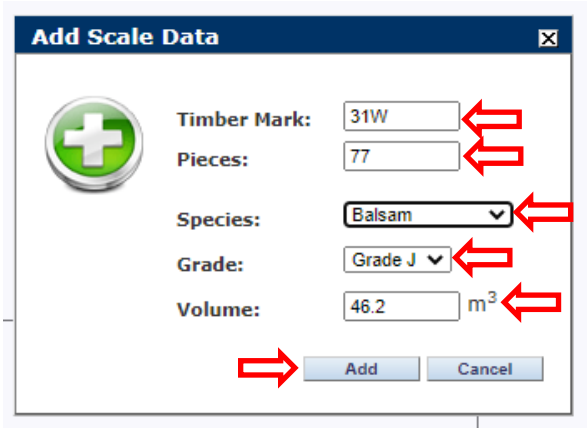


For each package created, Summary of Scale data must be added. To start, select the *Add Item* icon, at the far right.

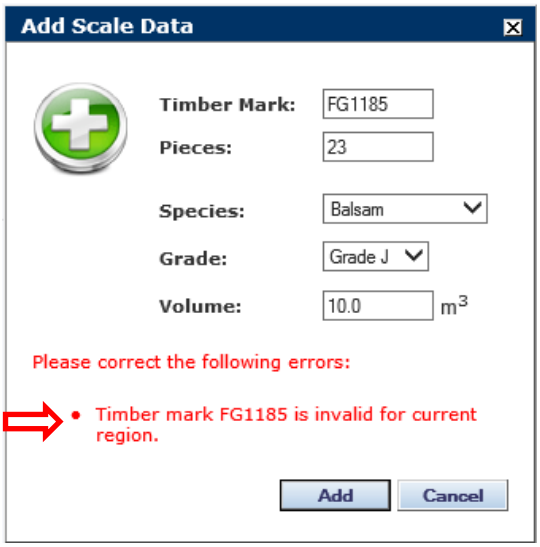


Selecting the *Add Item* icon opens a small window. The *Add Scale Data* window allows you to enter the timber mark, piece count, species, and grade, as well as volume in cubic metres. The Species and Grade options on the dropdown menus will only display those allowed for the region/area specified on the application, otherwise an error message will appear.

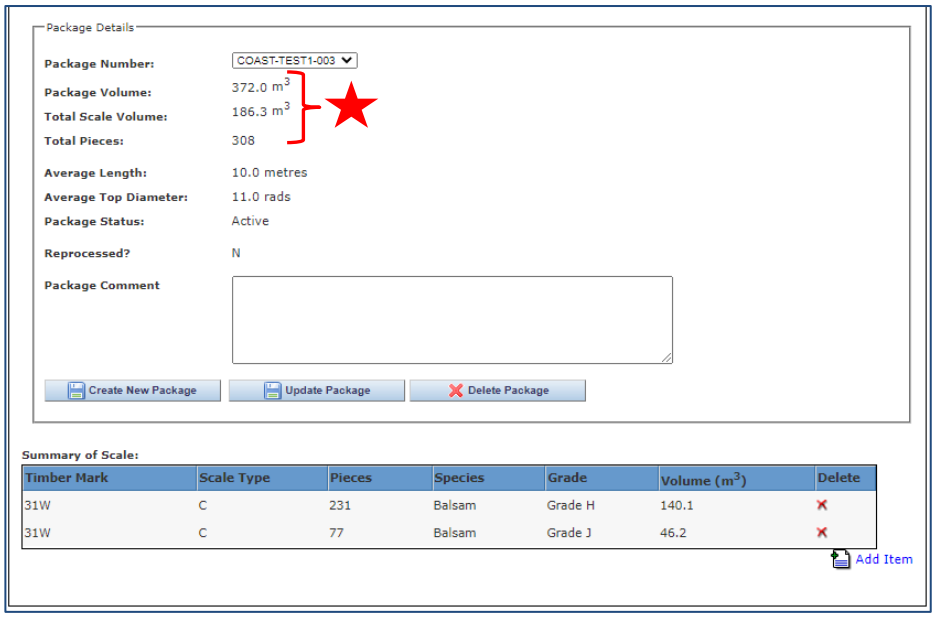
Once complete, select the Add button to save the line item to the Summary of Scale. The system will verify if the Timber Mark is valid for the region of the application and return an error if not.



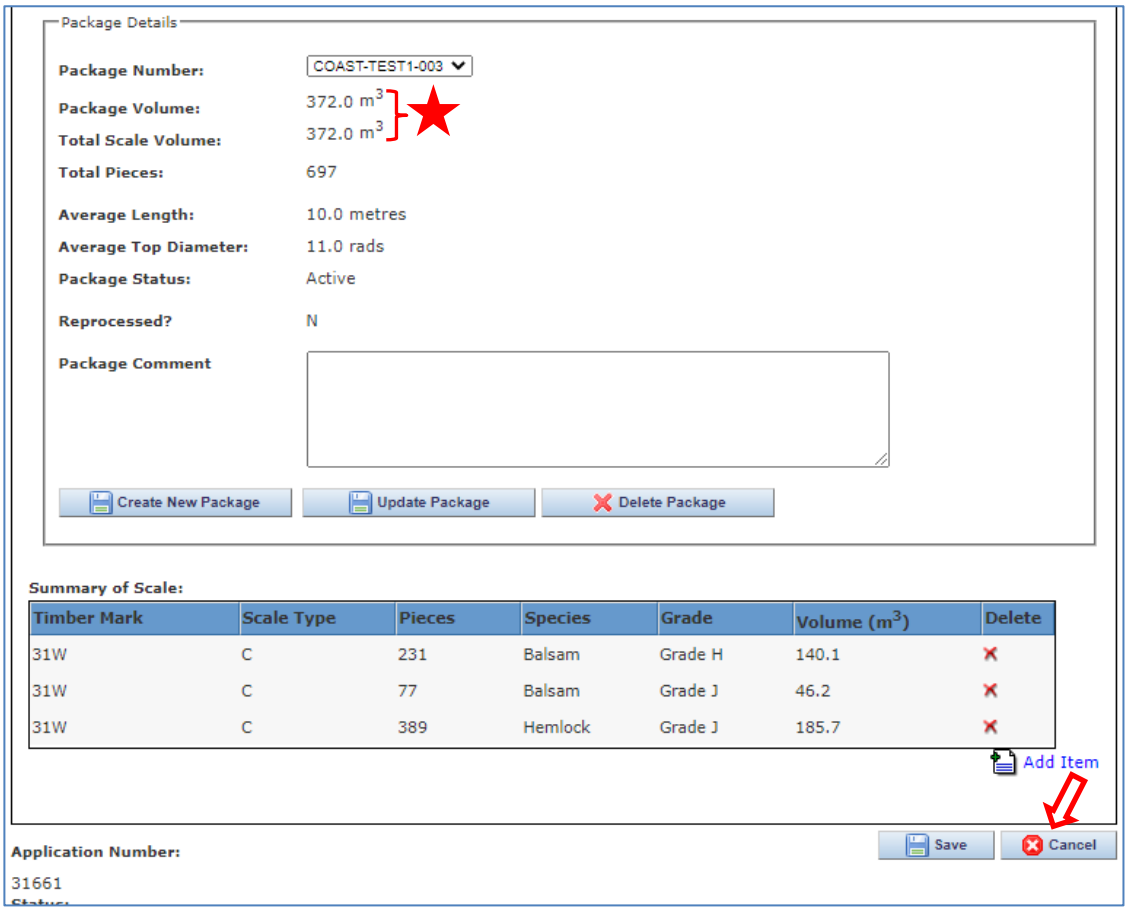
The following example shows the error message when the user tries to save a line of scale with a timber mark from the interior area on an application in the coastal area (in Test environment). Error must be corrected before the scale data can be successfully added.



With each saved scale line item, the system will display a cumulative total scale volume and pieces for the package. The user can then easily monitor how close they are getting to the Package Volume.



When satisfied all Summary of Scale items have been added and the scale volume matches the Package volume, select Cancel in the bottom right corner to exit from the application and return the Application Search screen. Only select Save if you have made other edits to the application.



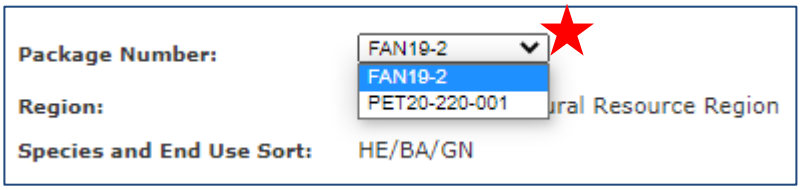
Approval for advertising of applications in the Coastal regions will only happen when the Package contains Summary of Scale data.

For the Interior regions, even after harvesting has begun, Summary of Scale data is not required until a permit is requested.

NOTE: Be sure to contact your area export officer for all requirements specific to your area.

Should you need to add another Package to the application, select the *Create New Package* button, and repeat the above instructions. Remember the total volume of all packages cannot exceed the volume of the application.

To see/edit/create the summary of scale data for an existing package, select the desired package number from the Package Number drop down list, and repeat the above process.

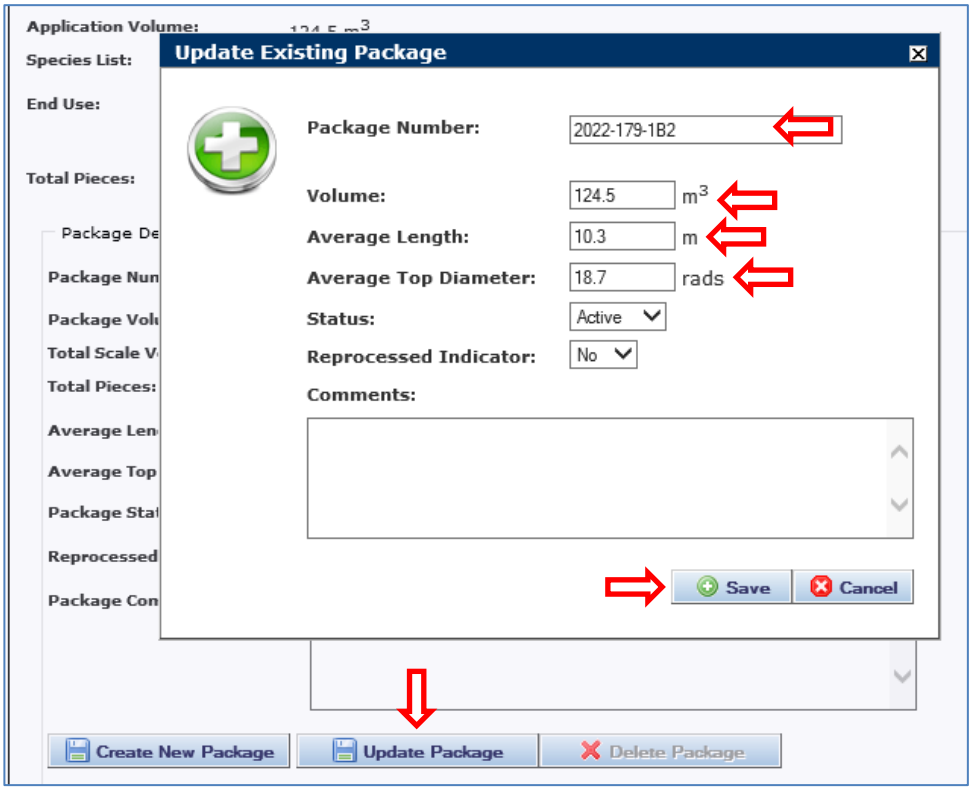


Edit Package Details

Before an application is approved, the Package Details section may be edited. By selecting the Update Package button, a new window will open, and corrections can be made to the Package Number, Volume (but not to exceed the volume of the application), Average Length, and Average Top Diameter.

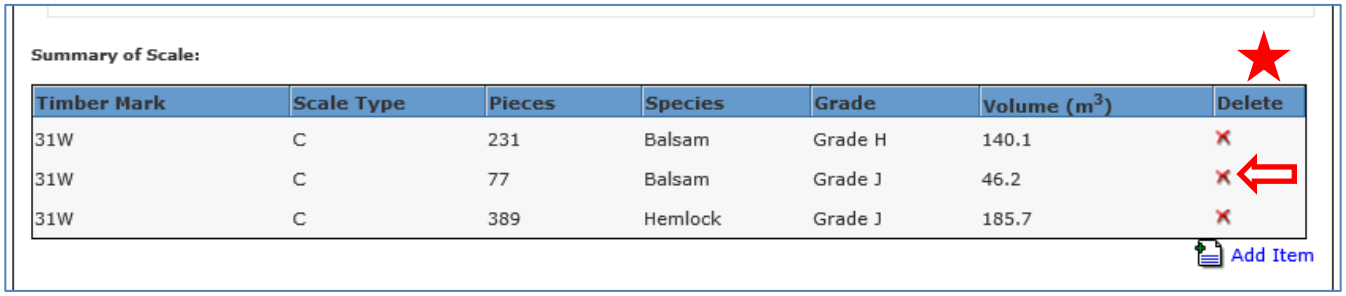
Press the Save button to save your changes, or the Cancel button to discard them.

The Package details section will be locked to further changes after approval.



Edit Summary of Scale

To edit a line of scale, the line item must first be deleted, then re-entered correctly. Keep in mind the total volume in Summary of Scale cannot exceed the Package Volume entered in the Package Details section. If the package volume needs to change, go back to the previous step, and make that change before increasing the total volume in the lines of scale.

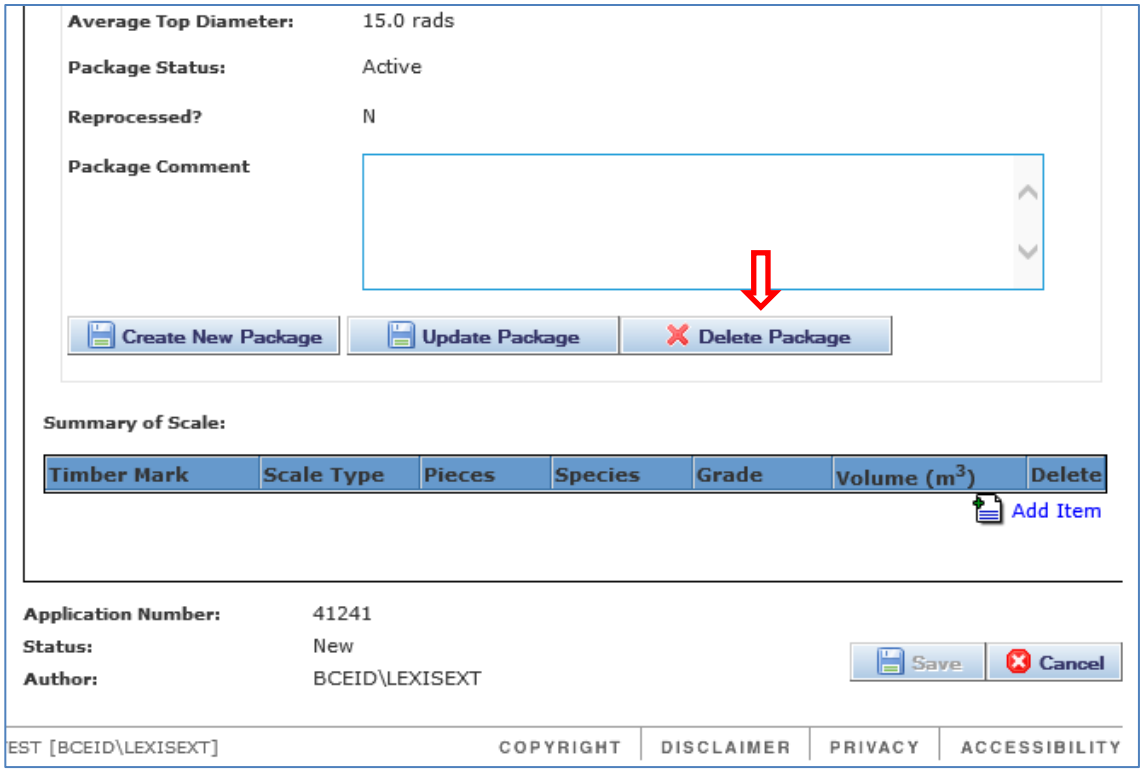


Deleting a line of scale is possible by selecting the red 'X' in the Delete column beside the line item.

That will prompt a "Delete Scale" window will open with details of the line to be deleted. Confirm deletion by selecting the Delete button. To cancel/avoid the deletion, select the Cancel button.

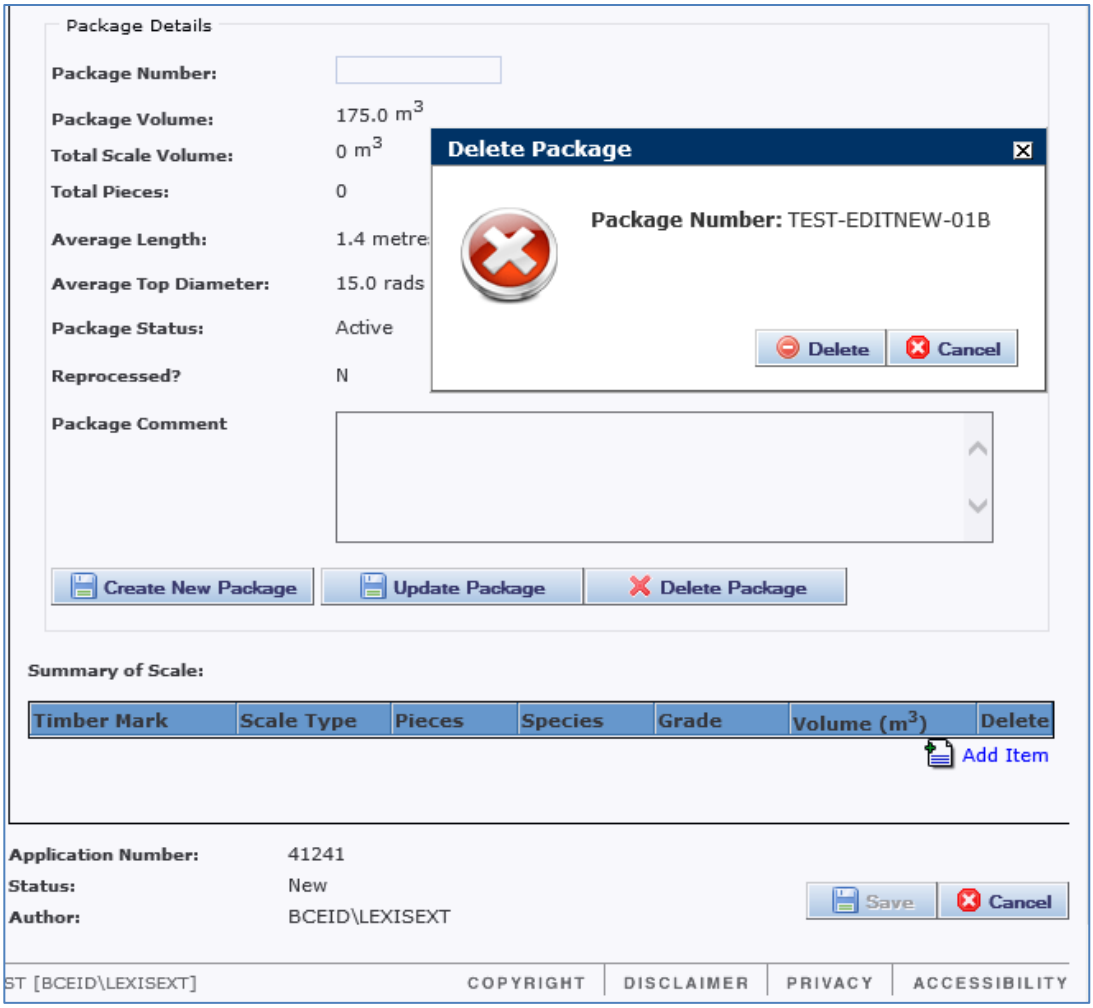
The screen will refresh with the revised totals after the deletion is confirmed. Next, select the *Add Item* icon to open a new "Add Scale Data" window and add the correct data. Saving the recently added line Item will refresh the total volume and pieces.

If there are no lines of scale, there is an option for the user to delete the entire package. Otherwise, the Delete Package icon/button appears greyed out (see above) and is not available.



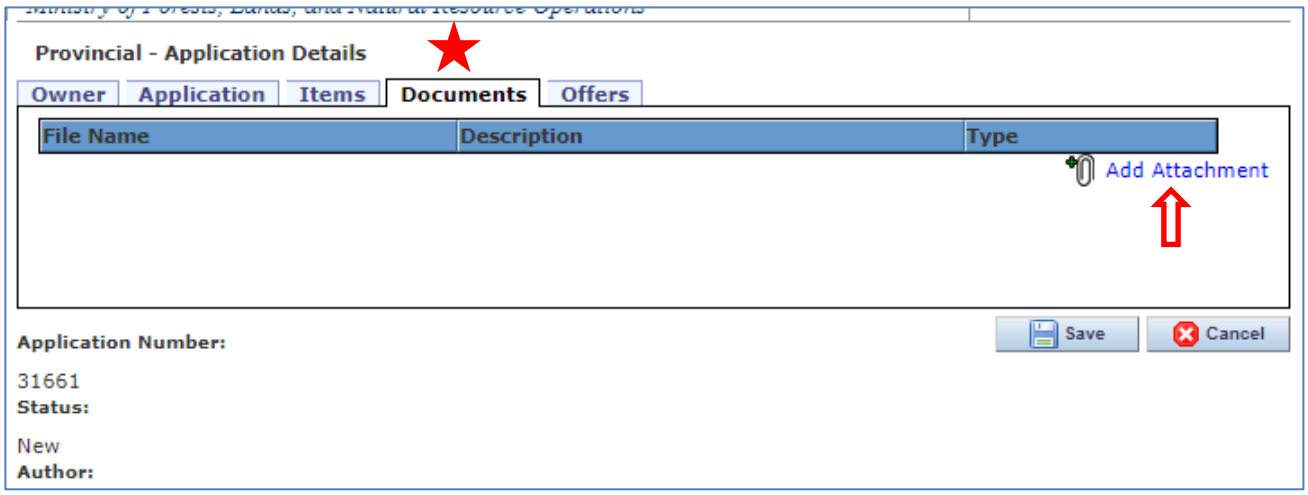
Selecting the Delete Package button to delete the now 'empty' package will trigger a small window to open where the user must confirm they wish to delete that specific package number. Select Delete to confirm. If in doubt, or user has changed their mind, select the Cancel button.

Deleting the Package will remove it from the application, but the package number will still exist in the database. This means the number cannot be used again as each package number must be unique.



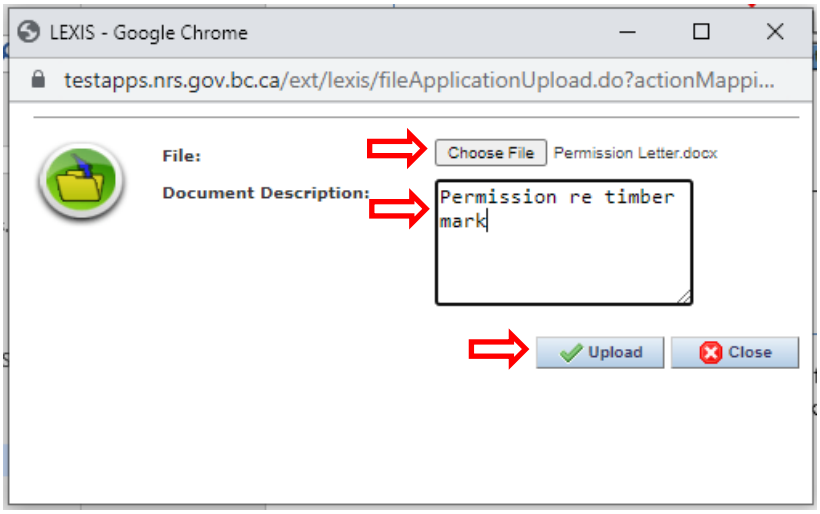
Documents tab

If a document relating to the application needs to be uploaded, select the *Add Attachment* icon.

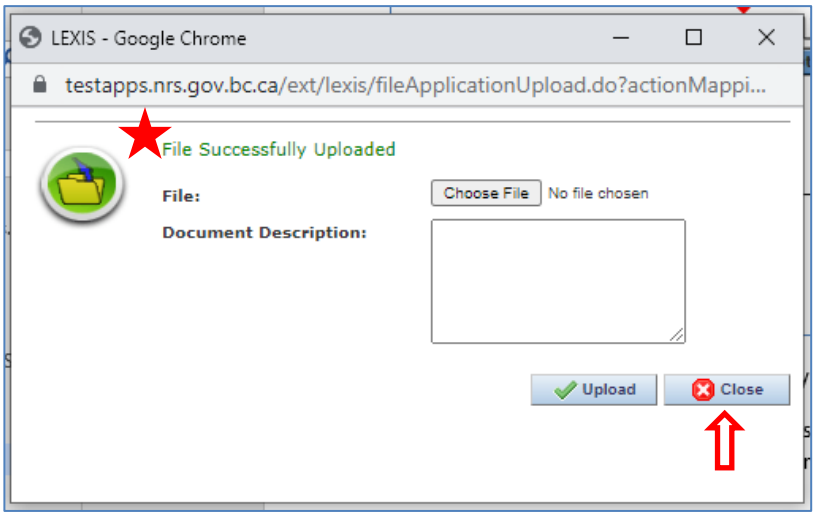


A new window will open where you can identify the document to attach. Three (3) types of documents are acceptable types, i.e., Excel, Word, and JPG.

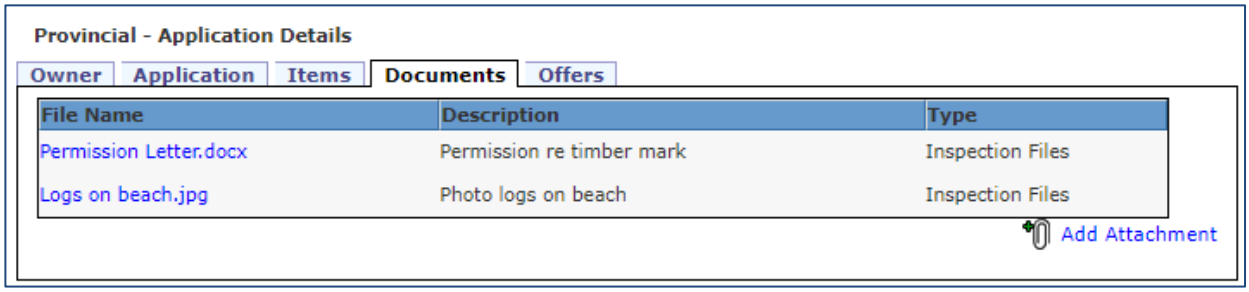
Select the *Choose File* button to search your directory and press Open to select the file. Enter a clear Document Description to make identifying it easier, especially if the document name won't be obvious to someone who needs to read it.



Next select the *Upload* button. Once complete, you will see a "Fill Successfully Uploaded" message in green, or an error message in red. The small window will stay open, if additional documents are to be added.



User may add as many documents as required, including different file types by selecting the *Choose File* button each time. When finished, select the *Close* button to close the window. All documents added will be listed on the Documents tab and will stay with the Application as it moves through to the exemption/permit stages.



NOTE: Describe the documents effectively. Check with the area Export Officer for all necessary documents.

Offers tab

The Offers tab will list any offers received on the advertised timber but remains blank otherwise.

Edit an application before approval for advertising

An application for any given Advertising List date must be submitted before end of day of the Final Date for the Receipt of Applications listed on the Schedule for Advertising List, i.e., the cut-off date which is the day before the listing date. It may not be edited after the status changes to Approved.

The Schedule for the calendar year is posted on the Weekly Advertising Lists web page at http://www2.gov.bc.ca/gov/content?id=EEC95AA8942A4E3BA7A71C707E6F2BF5.

Applications will be reviewed for approval on the day of the List Date. The Advertising List will be posted before the end of business day and the List is posted to the public Weekly Advertising List webpage. Most often, the List is available in either CSV or PDF format. Year-to-date and historical lists in CSV format are also posted on the website.

Confirming an application has been approved

To check the status of an application, select *Application Search*. Changing the value in the Application Status drop down box allows a user to view the status of various applications.

However, the applicant may be notified by email if the application has been rejected or withdrawn, including a brief explanation.

Helpful Tip:

If at any time during the 2-week advertised period a client discovers a boom/package needs to be re-sorted or is sold domestically, it is recommended they contact the area export office to withdraw the application and avoid further processing.

Offers on Advertised Applications

LEXIS grants industry clients the online ability to manage an offer on provincial timber advertised on the Advertising List before the Final Date for Receipt of Offers (as determined by the published Schedule for Advertising List). To do this, the offering client must have a valid BCeID User ID and be granted access to LEXIS. The offering client is responsible to enter and withdraw their own offers, as necessary.

Any valid offer received and not withdrawn as of the "Offers must be withdrawn by" date in the published Advertising Schedule will be forwarded to the Timber Export Advisory Committee (TEAC) for review and determination on behalf of the Minister.

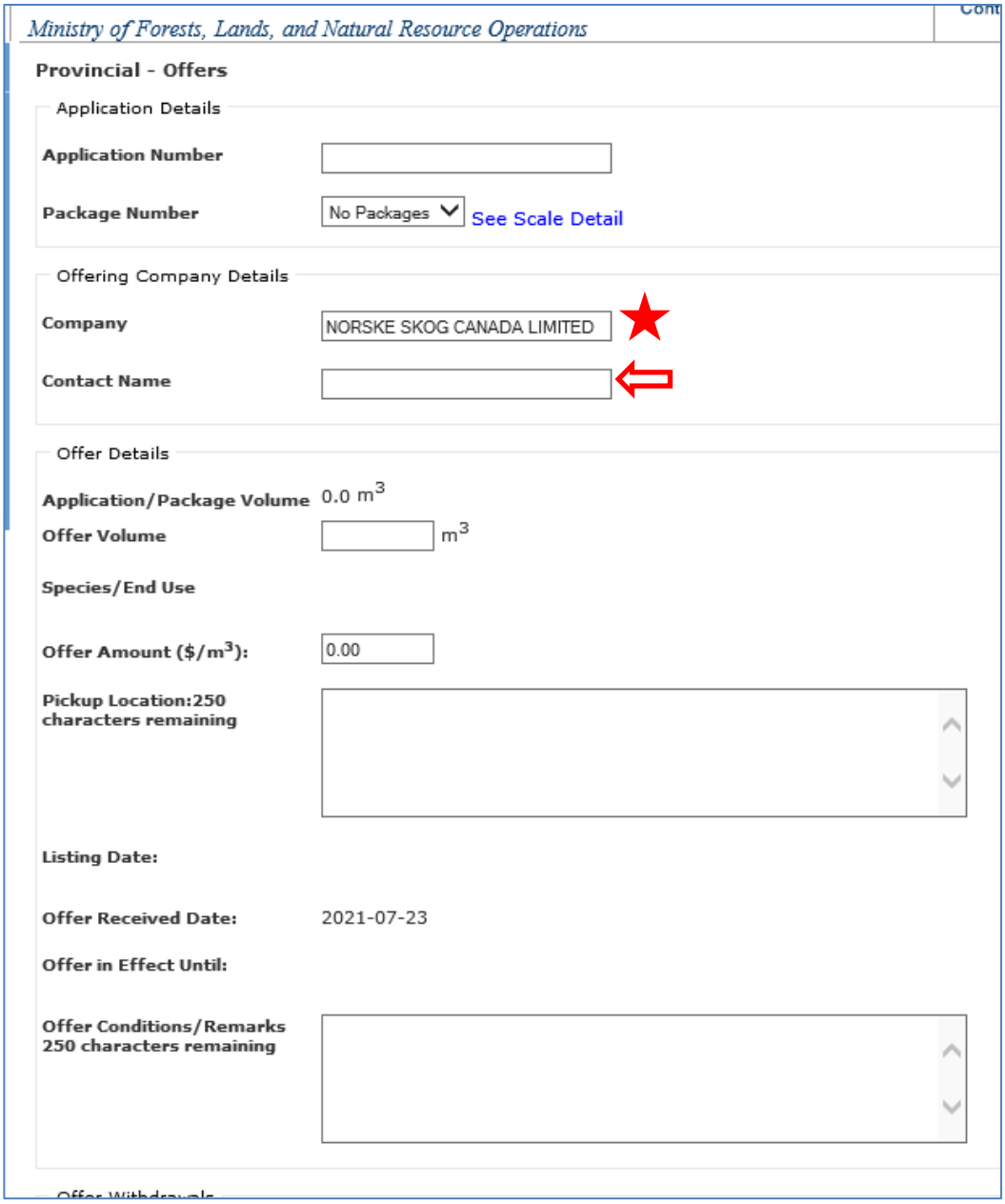
The region will review all online offers and will not consider offers to purchase logs by any company or individual that has exported logs, directly or indirectly, from BC within the previous 90 days.

Create an offer

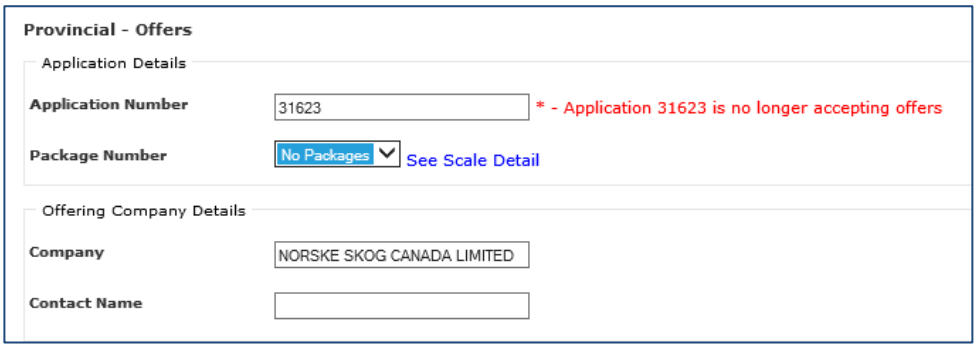
An offering client must login to LEXIS to place an offer on an eligible application number.

After logging in, select *Create/Edit Offer* in the left-hand navigation pane which will direct you to a *Provincial – Offers* screen.

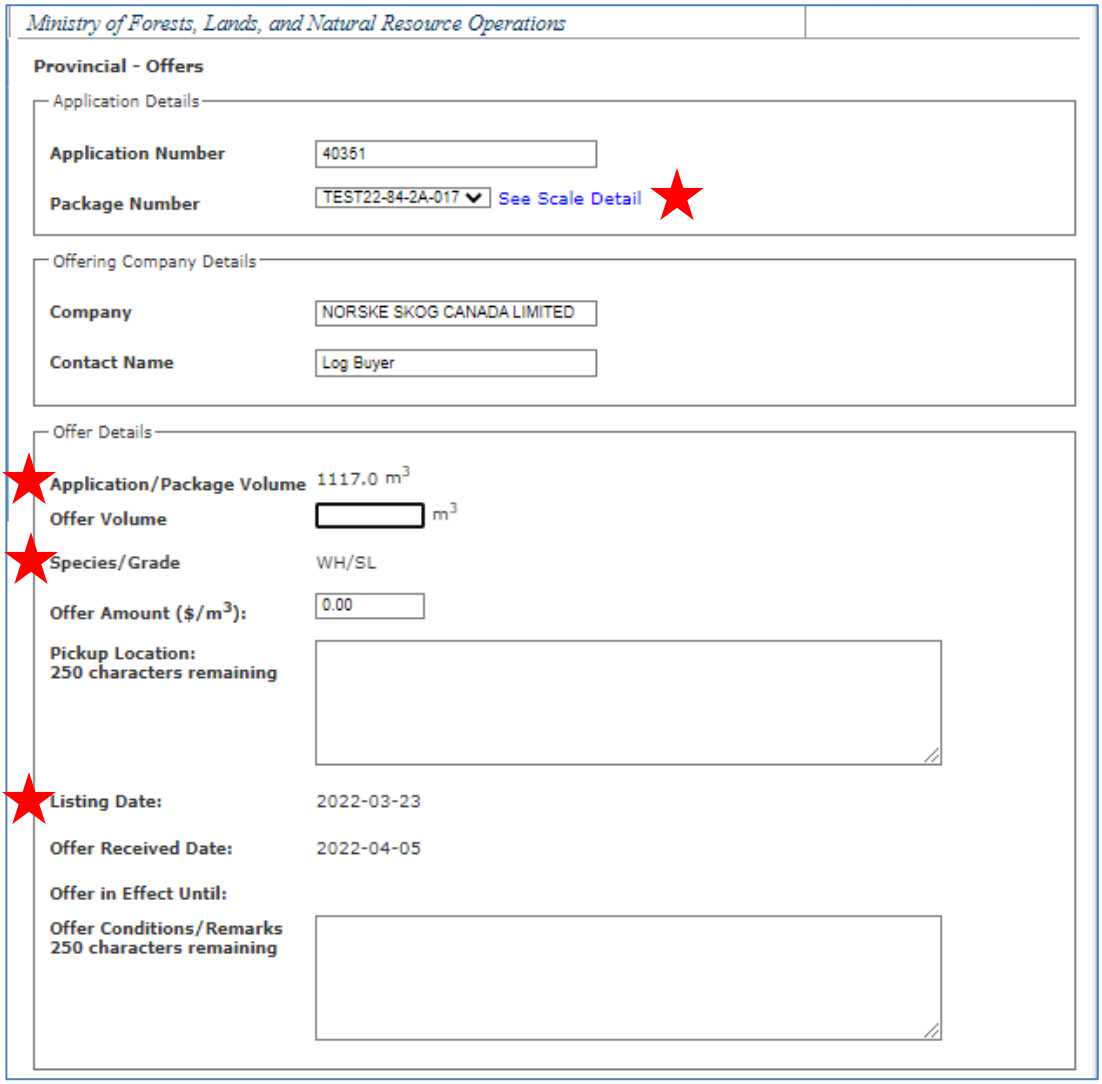
The *Offering Company Details* should auto-complete user's Company name per the login. The user must then enter the company Contact Name.



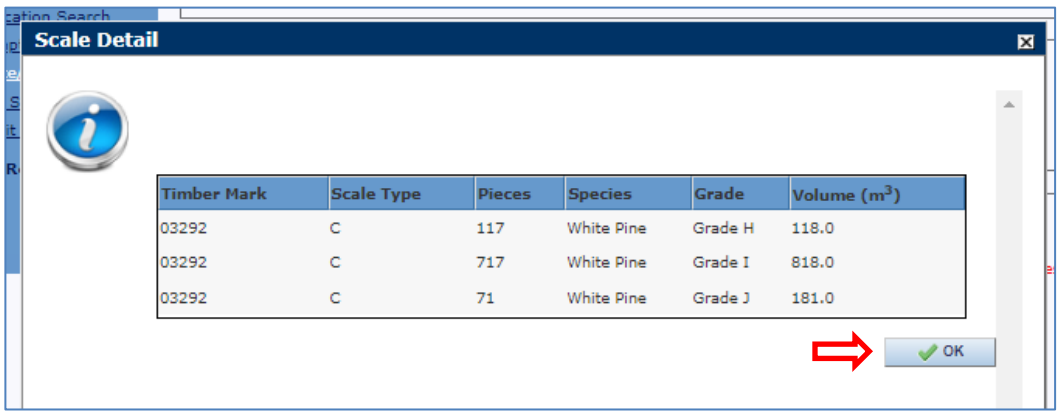
User must know the advertised Application Number to place an offer against it. The Application Number can be found on the Advertising List. If the approved application is not eligible to receive offers, an error message will be displayed.



After the application number is entered on the Offers screen, the system will auto-populate the listing date, application/package volume and species/end use. The user should verify the application details match the advertised information before proceeding.

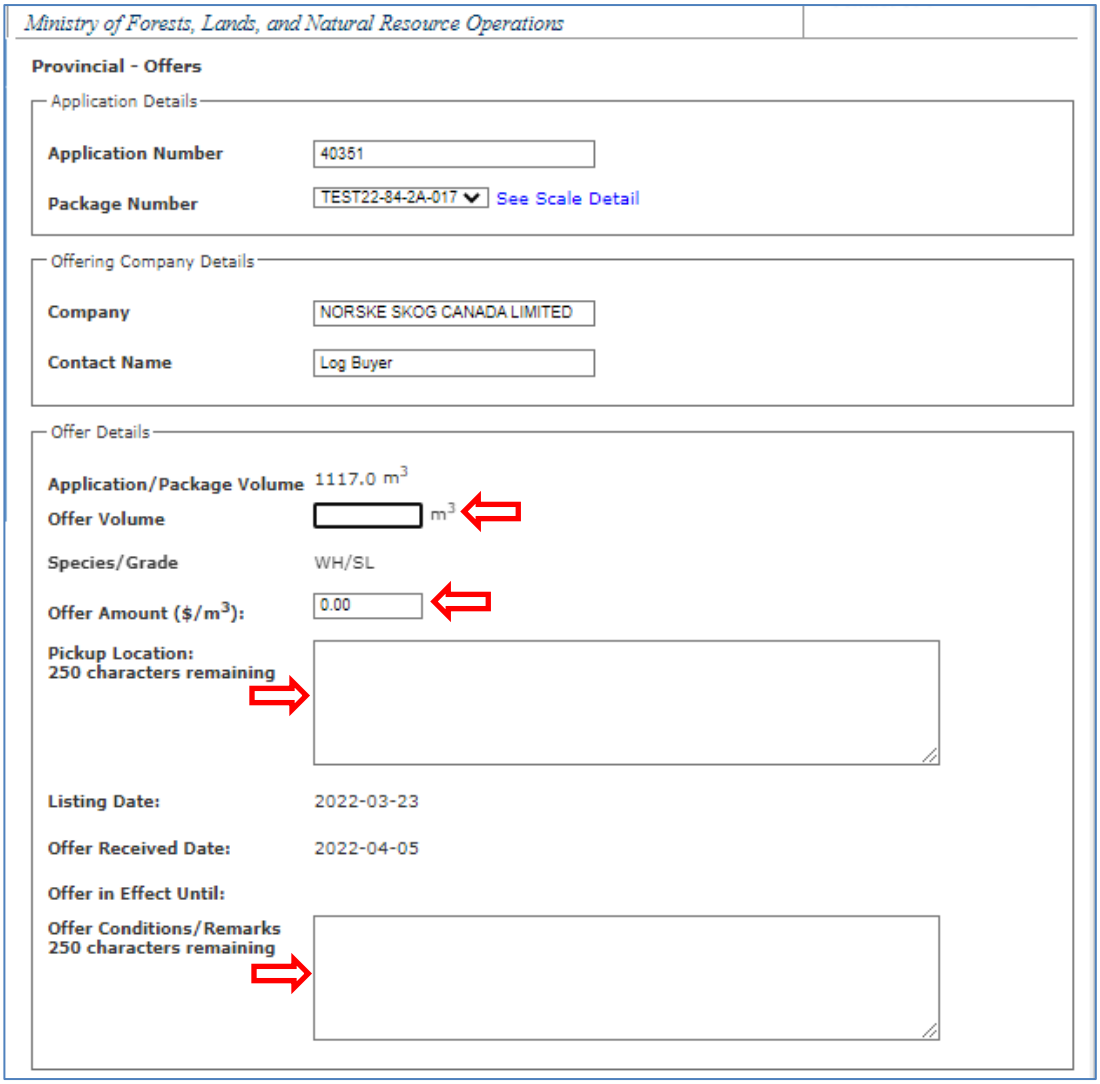


For all coastal regions, the system will display the *Package Number(s)* associated with the application number. Where multiple packages exist, a *Package Number* drop down box will be available. For each Package Number, a 'See Scale Detail' link will also appear. Select the See Scale Detail link to open a small window to display the Summary of Scale for that package number. Select the OK button to close this window.



For interior regions, there will likely be no package information associated with the application, but an offer for all or part of the application volume is acceptable for applications in those regions.

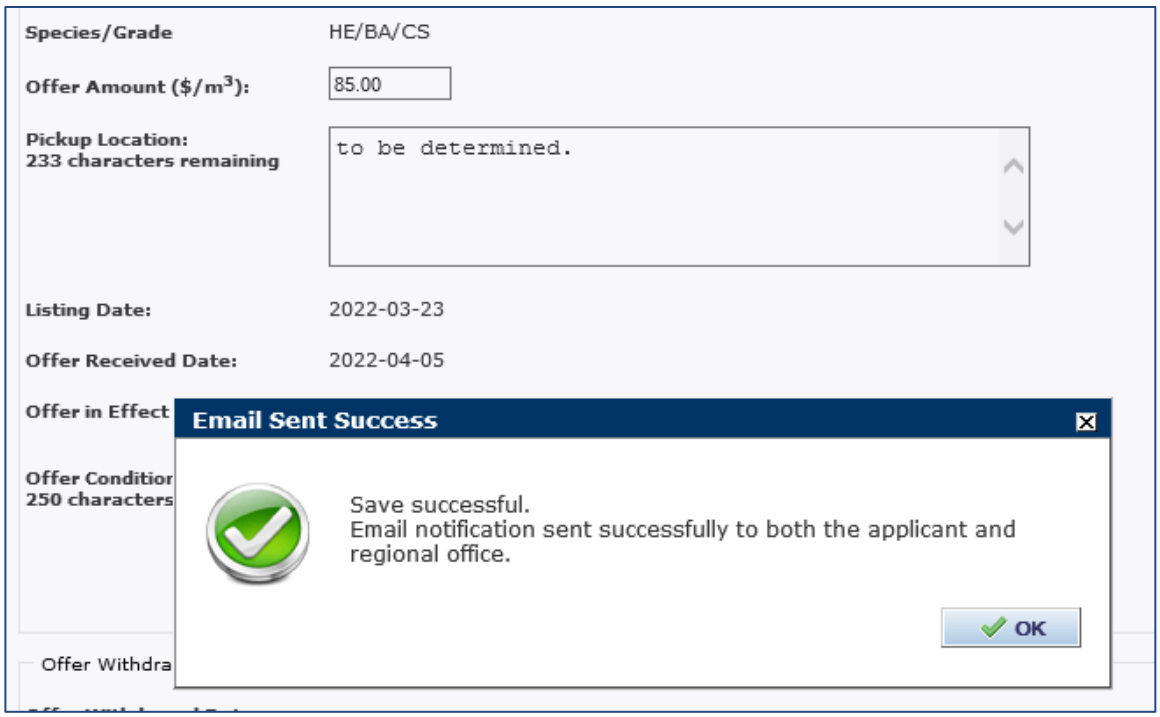
User will be required to complete the Offer Volume, Offer Amount, Pickup Location and Offer Conditions/Remarks (optional).



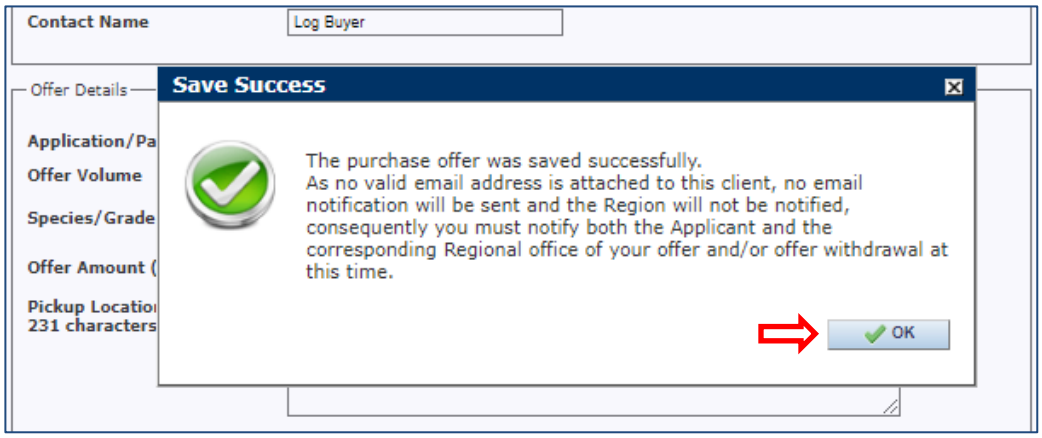
After completing the sections, press *Save* to complete the offer.

Selecting Cancel will remove the offer and all it's details.

The successful save will be confirmed, and a system-generated email notification will be sent to the applicant advising them an offer has been placed on the application, with an email copy sent to the relevant area export office. User does not have the opportunity to cancel the email.



Should the advertising applicant have no email address attached to their application, the save will be confirmed plus the offering client will be reminded they are responsible to notify both the advertiser and the relevant regional office via other methods. The user will be reminded of this and must acknowledge the warning by selecting the OK button.



After the save function, the screen will refresh, and an offer number will be assigned and displayed at the bottom of the screen. User may want to record this number for later reference.

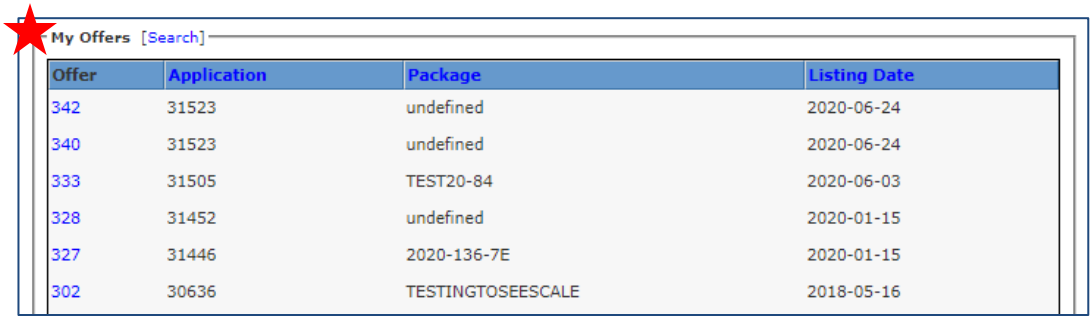
Staff with the Application Approver profile may also complete the offer using the client's full company name as displayed in the CLIENT system, plus a contact name.

Ministry staff will review all offers placed and ensure an offer is forwarded to the Timber Export Advisory Committee for review and decision unless it is 'withdrawn' before the deadline. The status of the offer will be indicated in the *Approval* section.

Select Cancel in the bottom right corner to exit the Offer as selecting save a second time will generate an additional email notification.

Reviewing an Offer Place or Received

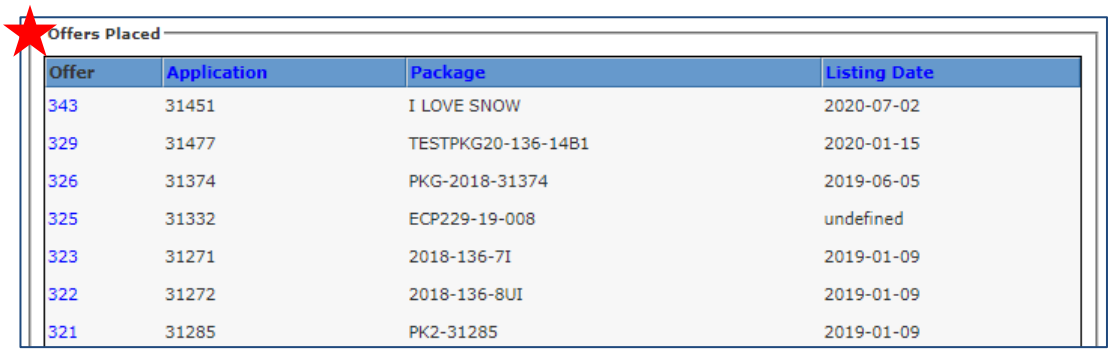
An Applicant can review offers that have been made on their applications by returning to the home/Summary page and scrolling down to the My Offers table. Also, if the Application number is known, the user can select on *Offer Search* from the LEXIS Menu and find an offer to open and review.



My Offers [Search]

Offer	Application	Package	Listing Date
342	31523	undefined	2020-06-24
340	31523	undefined	2020-06-24
333	31505	TEST20-84	2020-06-03
328	31452	undefined	2020-01-15
327	31446	2020-136-7E	2020-01-15
302	30636	TESTINGTOSEESCALE	2018-05-16

As an Offeror, the user can review the offers they have placed if they scroll down to the Offers Placed table. Any offer placed can be withdrawn online before the "Offers must be withdrawn by" date.



Offers Placed

Offer	Application	Package	Listing Date
343	31451	I LOVE SNOW	2020-07-02
329	31477	TESTPKG20-136-14B1	2020-01-15
326	31374	PKG-2018-31374	2019-06-05
325	31332	ECP229-19-008	undefined
323	31271	2018-136-7I	2019-01-09
322	31272	2018-136-8UI	2019-01-09
321	31285	PK2-31285	2019-01-09

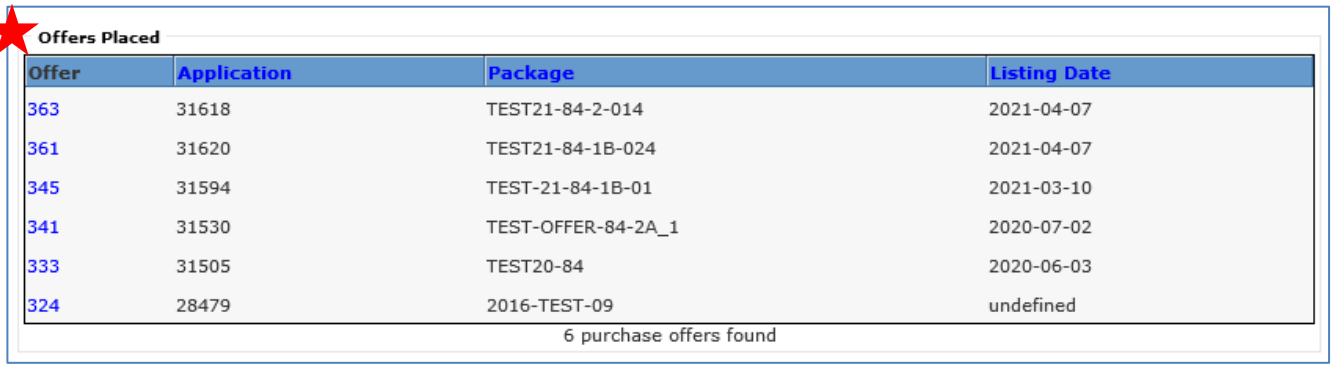
Clients can only see the offers made on applications where they are the applicant or owner. Likewise, they will only see the offers they have placed on advertised applications.

Withdraw an Offer Placed

To withdraw an offer placed before the final date to receive offers, user must locate and open the offer to enter the withdrawal date and the reason why. The offer can be found 2 ways: either from the client's Summary page on the Offers Placed table or select Offer Search from the LEXIS Menu.

Search from Offers Placed

On your Summary page, scroll down to the bottom to find the Offers Placed table where the most recent offer is at the top by default. Information in the columns can be sorted by selecting a blue column header to change the order from ascending to descending, and vice versa. Confirm the Application and Offer Number is listed.

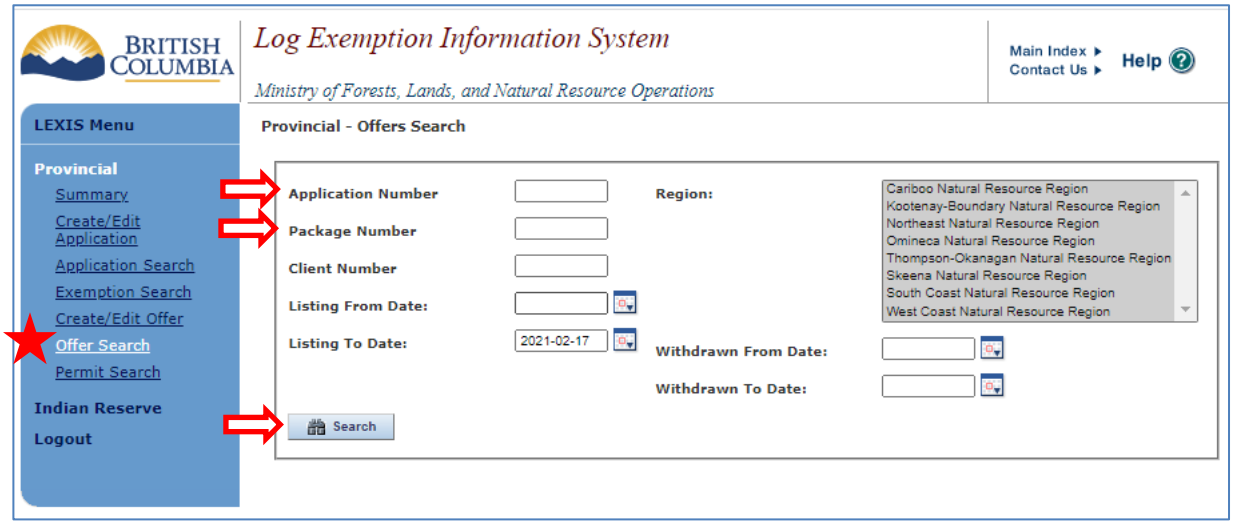


Offers Placed

Offer	Application	Package	Listing Date
363	31618	TEST21-84-2-014	2021-04-07
361	31620	TEST21-84-1B-024	2021-04-07
345	31594	TEST-21-84-1B-01	2021-03-10
341	31530	TEST-OFFER-84-2A_1	2020-07-02
333	31505	TEST20-84	2020-06-03
324	28479	2016-TEST-09	undefined

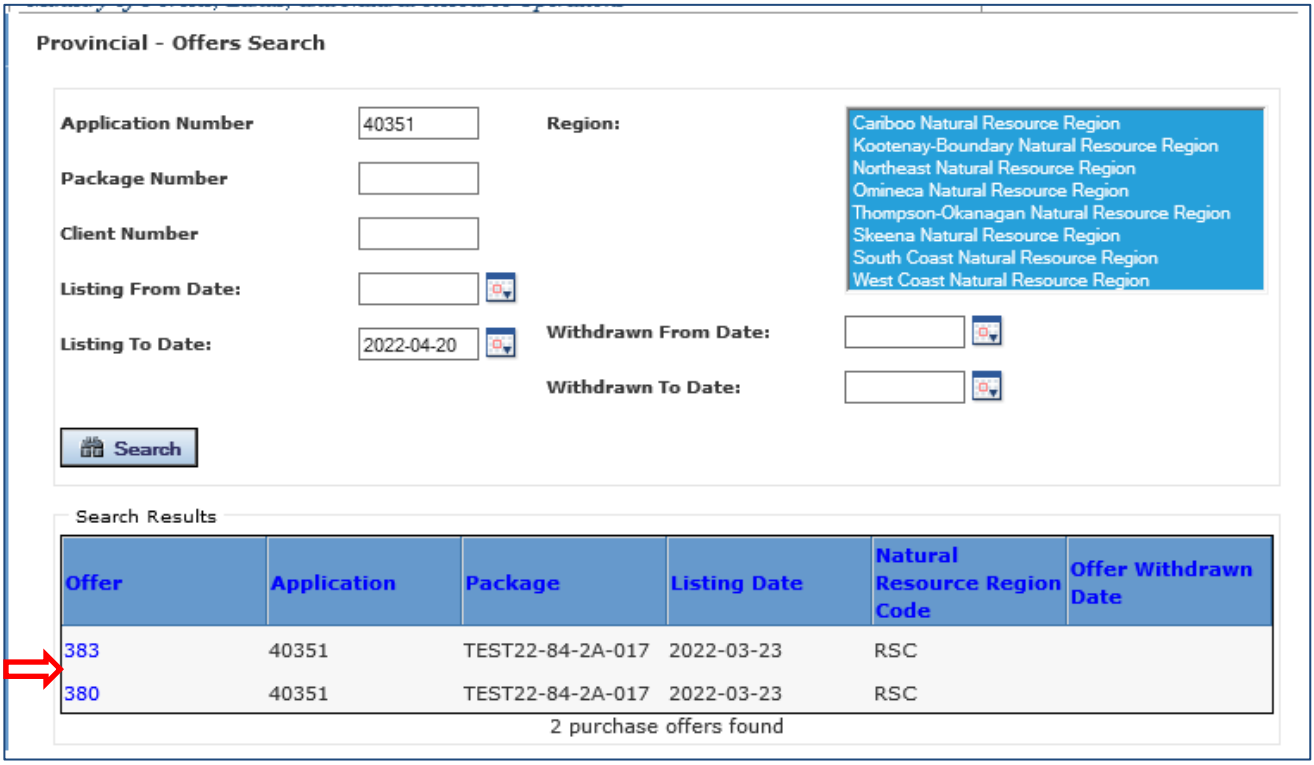
6 purchase offers found

Search from Offer Search



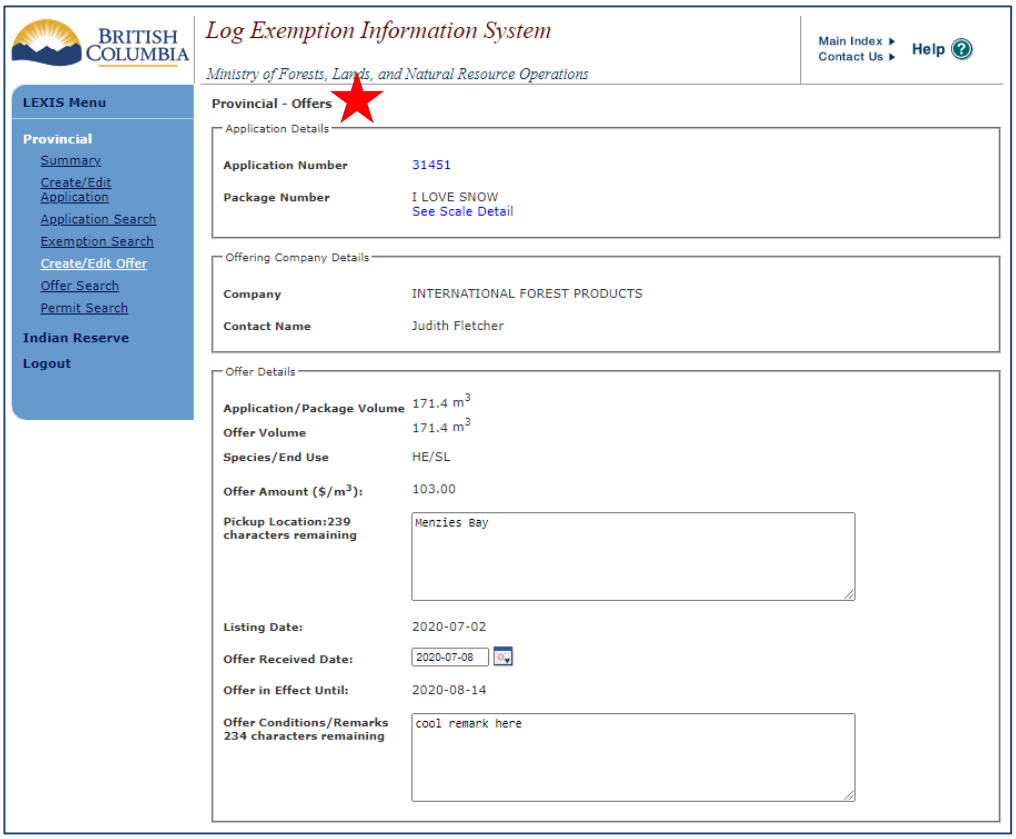
Note you cannot search by the Offer Number at this time. User might know the Application or Package Number (or other) to enter, then select the Search button. In the Search Results, confirm the Offer Number is listed.

In the Search Results, confirm the Offer Number is listed and open by selecting the offer number.

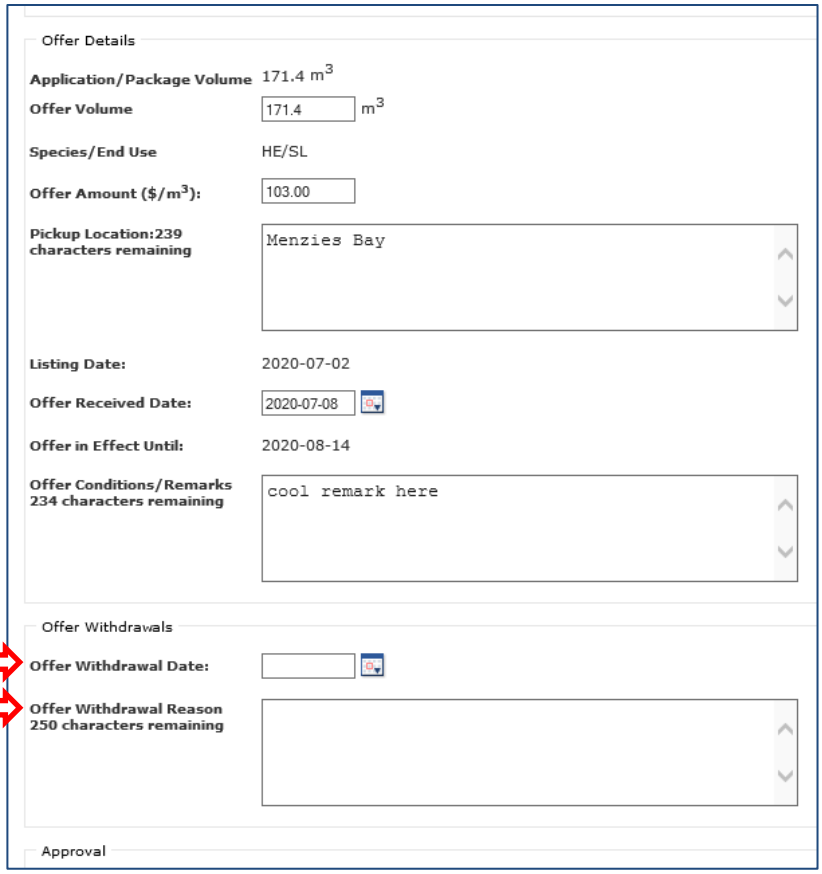


Withdraw an existing Offer

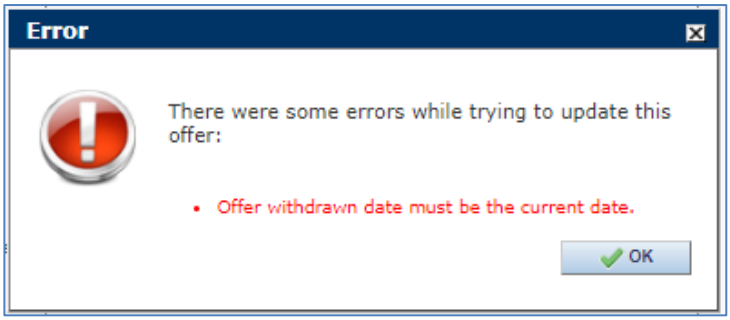
Selecting the Offer Number will direct you to the *Provincial – Offers* screen.



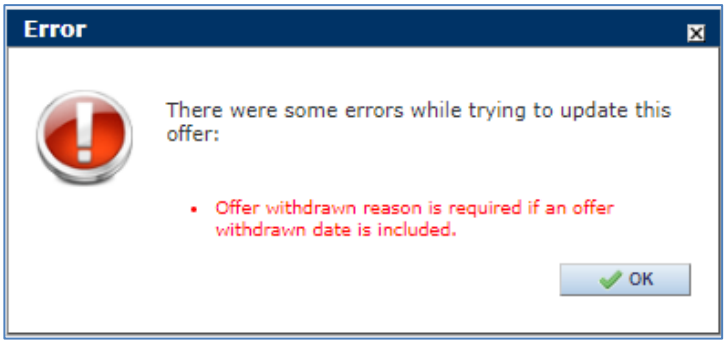
It is mandatory to complete the Withdrawal Date with a Withdrawal Reason for the withdrawal to be effective. Use the calendar icon to select a date and complete the Offer Withdrawal Reason field (250 characters). Select *Save* to complete the offer withdrawal.



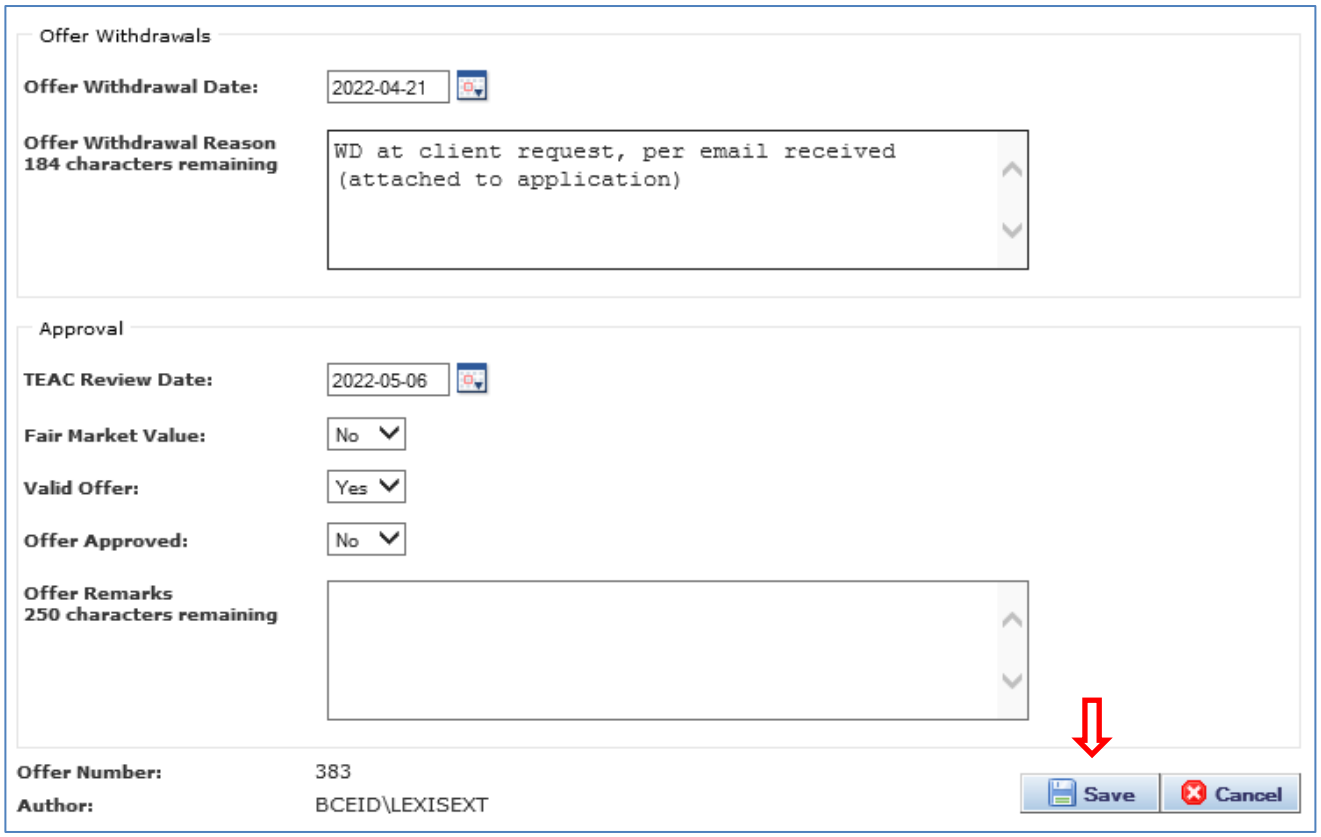
The Withdrawal Date can be selected using the calendar icon but must be the current date, or an error message will open.



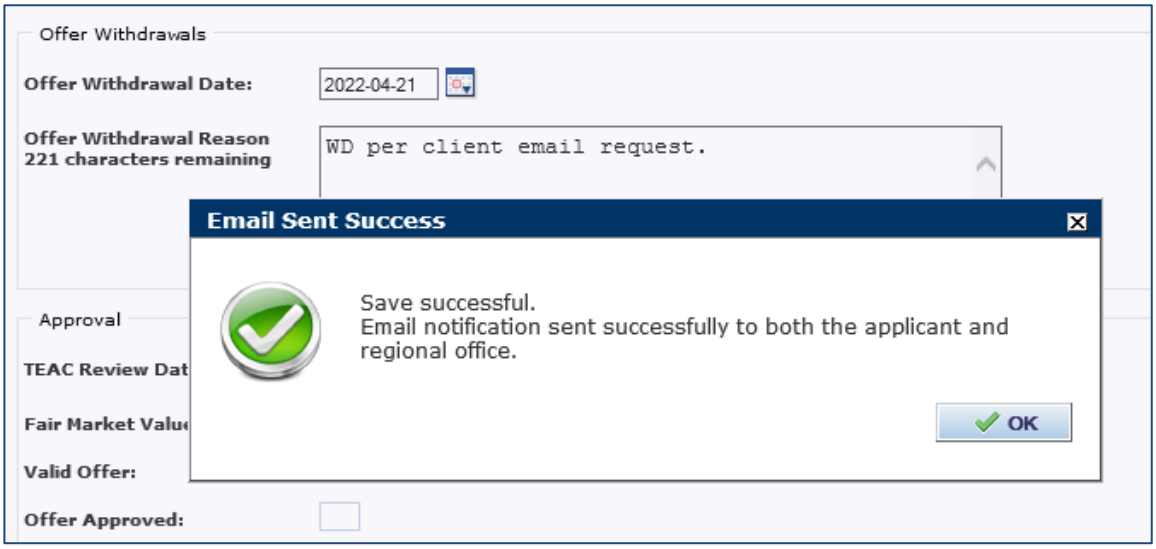
Likewise, user is required to complete the Offer Withdrawal Reason field (up to 250 characters) to be valid. Select *Save* to complete the offer withdrawal.



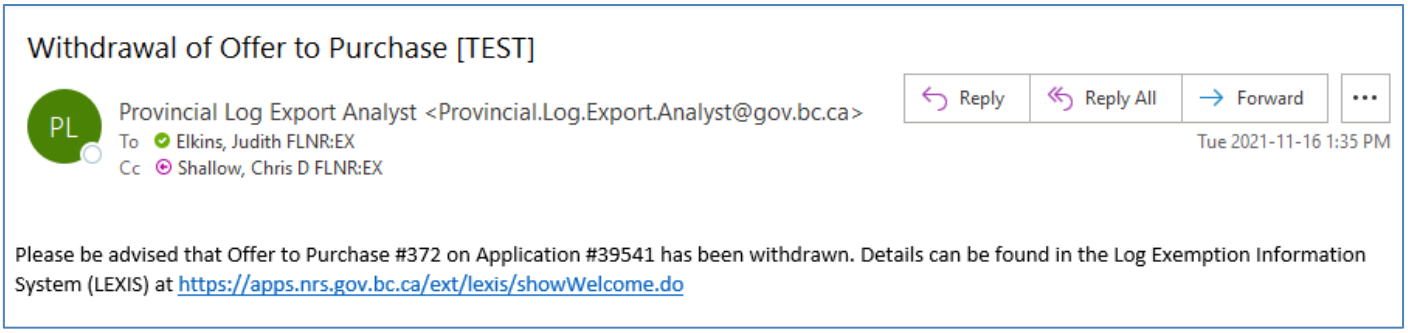
Select *Save* to complete the offer withdrawal. Selecting Cancel (and then Discard) will remove the Withdrawal Date and Reason.



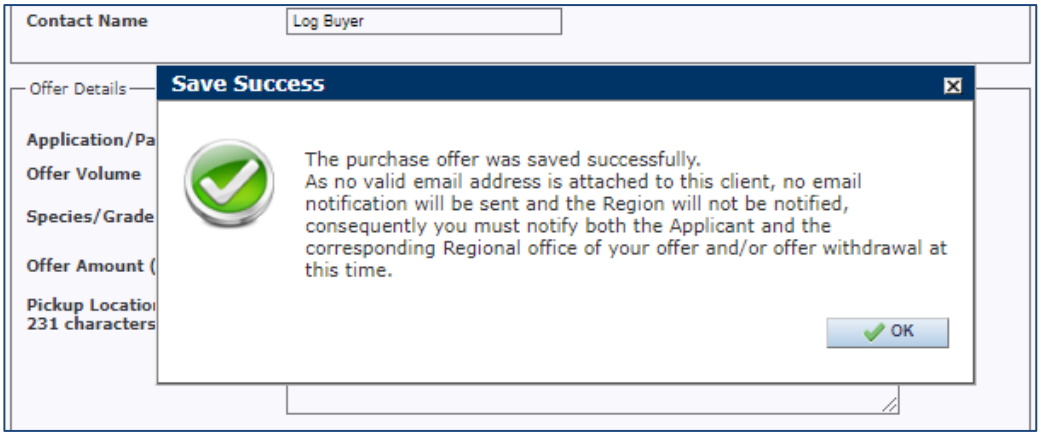
Upon saving, a new window will open confirming the save and the email notification was successfully sent to the advertising applicant. If a client has entered the offer the relevant area export office will be copied on the email. There is no option for users to cancel the email notification.



See below for an example of the email sent for offer withdrawal from the offering client to the advertising client, with a copy to the area export person in the northern interior.



Should the applicant not have an email address attached to their application, the client withdrawing the offer is responsible to notify both the advertiser and the relevant area export office via another method, outside of LEXIS.



Clients will not be able to use LEXIS to withdraw an offer placed after the final date to receive offers. Instead, they must direct their request to their regional export office to complete on their behalf.

FYI: Selecting the Cancel button in the bottom right corner to close is preferrable as selecting save a second time will generate a second email notification.

Clients will not be able to use LEXIS to withdraw an offer placed after the final date to receive offers. Instead, they must direct their request to their regional export office to complete on their behalf.

Exemptions

Ministerial Order (MO) Exemptions

A Ministerial Order is issued for applications of volumes of harvested/standing timber deemed surplus and are authorized on behalf of the Minister. Only area/regional directors are given the profile of *Exemption Approver* in LEXIS. The ministerial order exemption can only be created from exemption applications that have passed the surplus test and will be processed by staff in the area export office. See section 'Create Ministerial Order Exemption (Application Approver)' below for details.

Order in Council (OIC) Exemptions - Blanket and Individual

Occasionally, an Order in Council exemption is issued. There are 2 types in LEXIS. Blanket OIC (BOIC) exemptions can be created to address specific regional concerns and are not specific to a single applicant. Alternately, an OIC can be issued for an individual applicant with applications of standing timber in a particular area, or under exceptional circumstances as recommended by the Minister and put into legislation by Council. Details of existing OIC exemptions can be found on the Blanket Exemptions web page.

Any applicant can view details for a BOIC exemption and, if the requirements are met, request a permit against that exemption.

Individual OIC exemptions are specific to individual applicants and can be viewed only by the applicant for which the OIC exemption was created, including the permits granted against it. These are uncommon.

IMPORTANT for historical OICs:

Please note that to retain the historical data on pre-2.10 OIC exemptions (i.e., before October 2022), all will remain in LEXIS as type = OIC. This will allow staff users to refer to all the exemption/permit information and industry clients will not have access to see those exemptions.

New BOIC exemptions have been created as a type = BOIC to replace the 6 active B-OICs so that industry clients may open them to create permit requests going forward.

Review Exemptions after Approval

Approval of the Ministerial Order (MO) Exemptions is important because it is only after approval the client may apply for a provincial permit against the approved volumes attached to the Exemption. Only volumes on exempted application numbers can be permitted for export.

Exemption Approvers (typically, ministry Regional Executive Directors or their delegates) are required to approve Ministerial Orders (MO) exemptions on behalf of the Minister.

Staff will advise the Exemption Approver when there are MO exemptions ready to review and approve on behalf of the minister.

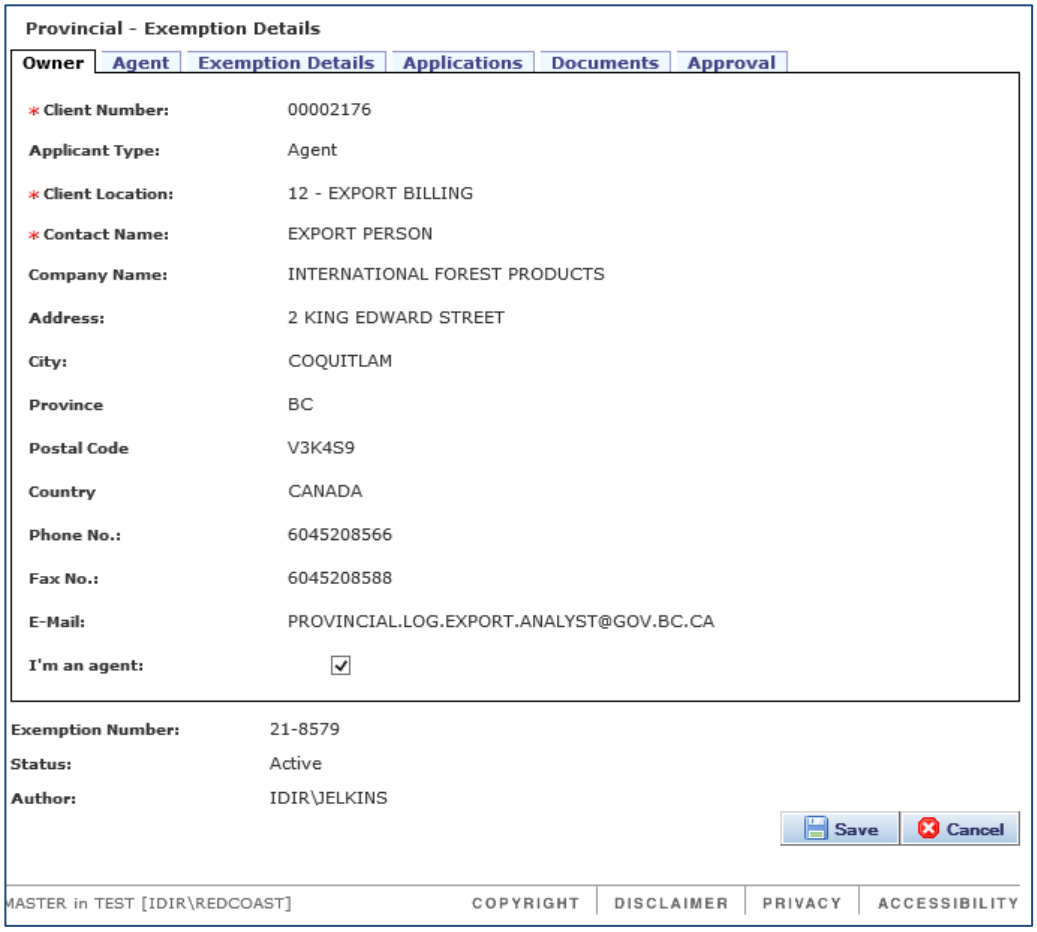
Review Ministerial Order (MO) Exemption

To review a MO exemption, search for and select the Exemption number to open it.

This will direct you to a *Provincial – Exemption Details* page and will open to the *Owner* tab. Review of the MO exemption can be navigated using the *Owner/Agent, Exemption Details*, *Applications, Documents,* and *Approval* tabs.

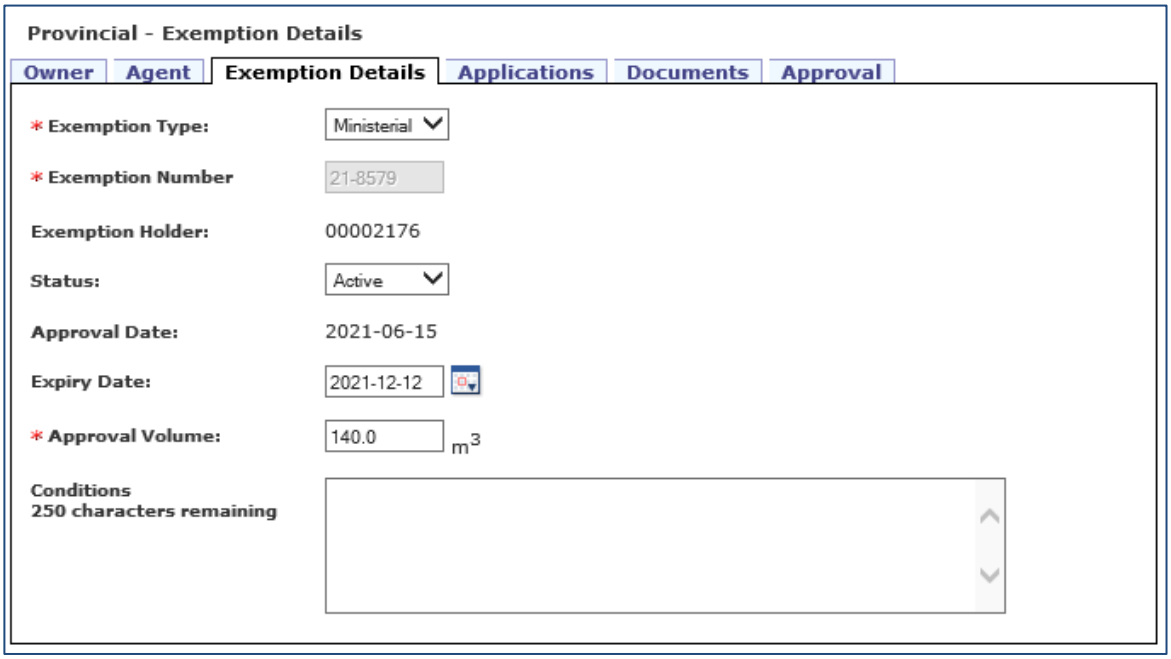
Owner/Agent tab

The Owner information will display contact information. If the applicant is different than the Owner on the original Application for Exemption, it too will be carried over and a separate Agent tab will display with the contact information.



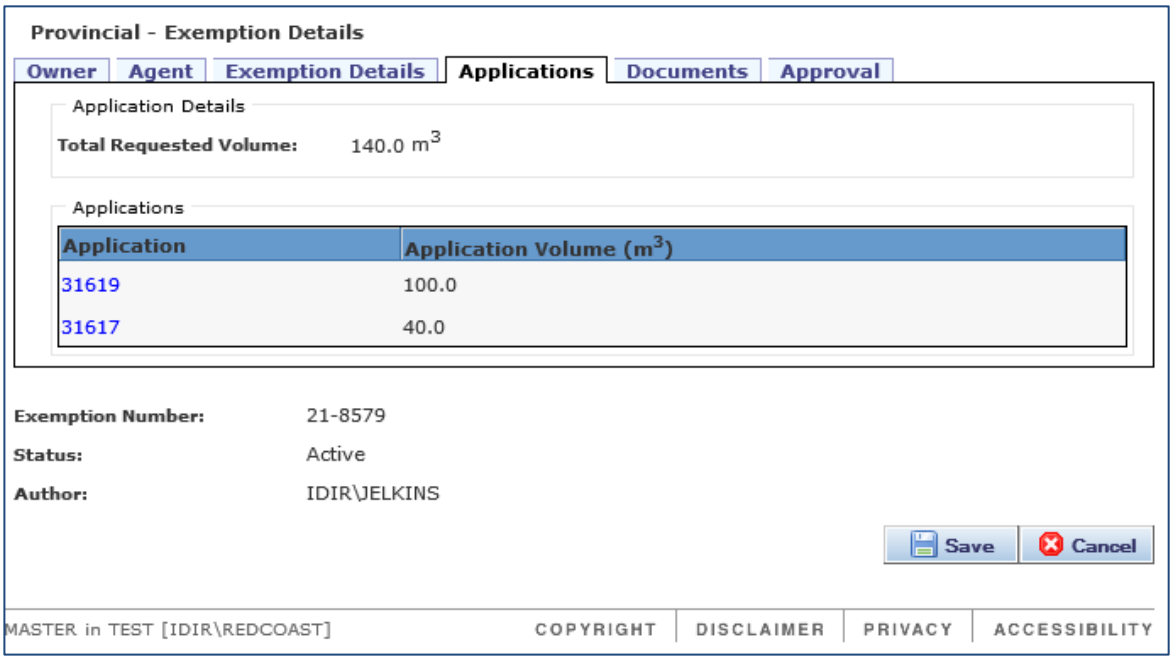
Exemption Details tab

The Exemption Details tab will display the information from the attached applications, including the Expiry Date, and the Approval Volume as a total volume of all applications.



Applications tab

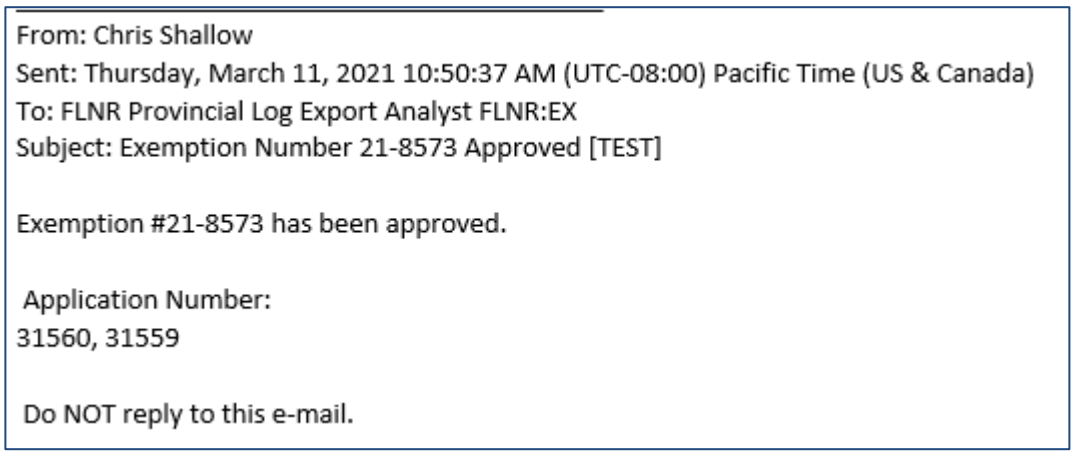
This tab provides details of which application(s) for exemption are associated with the MO exemption. The details of each application can be viewed in detail by selecting a linked application number. To return to the MO exemption, simply select the linked Exemption Number.



Notification of the Approved Exemption

After the exemption is successfully saved, an email notification will go to the email address on file.

The successful email notification will advise the Exemption holder of the approval, will indicate the Exemption Number, and list all associated Application Numbers, for easy reference. Here is a sample email from the Test environment:


From: Chris Shallow
Sent: Thursday, March 11, 2021 10:50:37 AM (UTC-08:00) Pacific Time (US & Canada)
To: FLNR Provincial Log Export Analyst FLNR:EX
Subject: Exemption Number 21-8573 Approved [TEST]

Exemption #21-8573 has been approved.

Application Number:
31560, 31559

Do NOT reply to this e-mail.

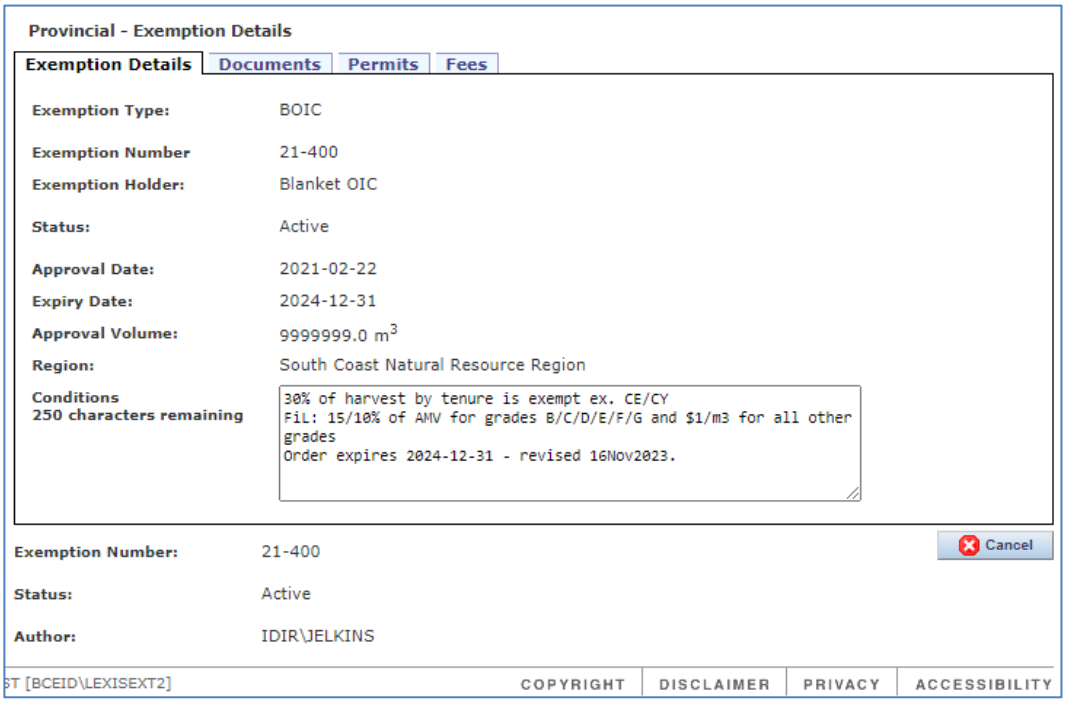
Review Blanket Order in Council (BOIC) Exemption

After a Blanket Order in Council (BOIC) exemption is approved by Council with Issued, Expiry dates and been assigned a number, it will be entered in LEXIS by staff. Functionality allows individual qualifying applicants to apply for permits by logging into LEXIS and opening the BOIC number. Client users can apply for the permits using their own client information. Note there are no client numbers associated with any BOIC exemptions.

Start by selecting the new *Exemption Type* – BOIC, for Blanket Order in Council – using the dropdown arrow.

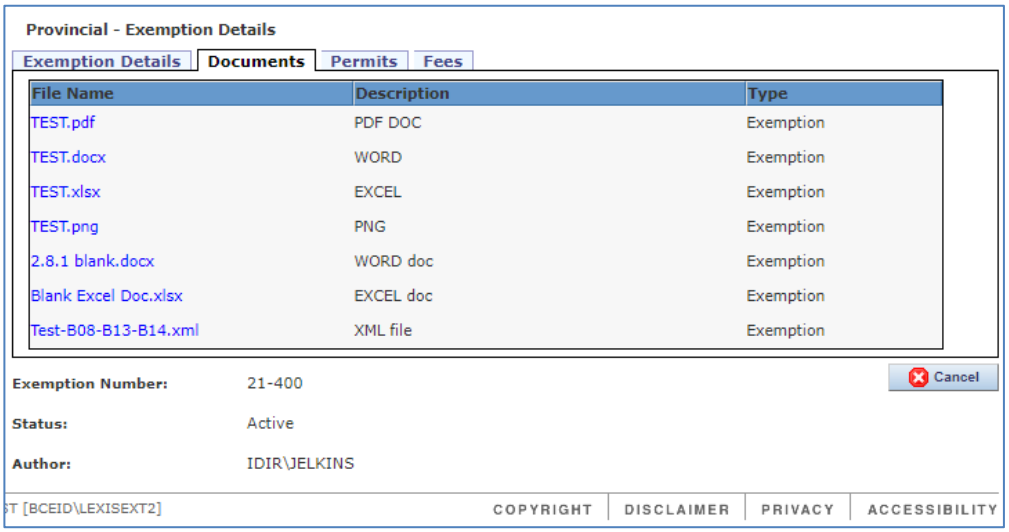
Exemption Details tab

Note the *Approval Volume* is auto populated with 9,999,999.9 m3. In the optional Conditions field, you may see a short list of relevant conditions of note.



Documents tab

Any documents relating to the BOIC exemption may be stored here, e.g., a PDF copy of the signed BOIC can be stored here for easy reference. Note that any document listed here will be available for read only to all clients, and only staff can add/delete documents to the BOIC.

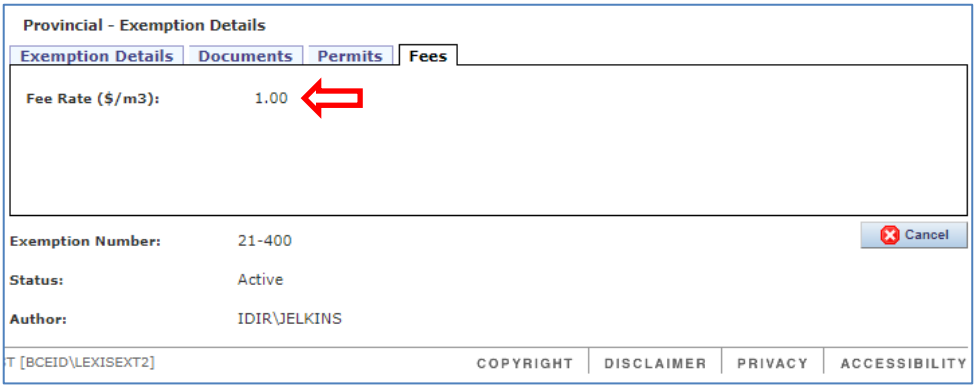


Permits tab

The Permits tab will provide a summary list of the permits processed under that BOIC.

Fees tab

If there is an applicable *Fee Override* rate under the BOIC, it will be shown here and will display on the Fees tab as the AMV value.



IMPORTANT for historical OICs:

Please note that to retain the historical data on pre-2.10 OIC exemptions, all will remain in LEXIS as type = OIC. This will allow staff users to refer to all the exemption/permit information and industry clients will not have access to see those exemptions.

Alternate BOIC exemptions have been created to replace the 6 active BOICs (pre-LEXIS 2.10) so that industry clients may open them to create permit requests going forward.

Request for Permit

After an exemption is approved and the applicant has received the email notification, the applicant can apply for a provincial Permit to Remove Unmanufactured Timber from British Columbia and will be required to pay the corresponding Fee in Lieu of Manufacture amount.

The method used to apply for the provincial permit varies a little depending on the type of exemption.

- The "Permit against a Ministerial Order exemption" section in this manual will be used for timber that has passed the surplus test.
- For timber harvested within an area defined by a Blanket Order in Council (BOIC), the process varies slightly. See section "Permit against a Blanket OIC exemption" in this manual.
- For timber harvested by a specified client within an area defined by an individual Order in Council (OIC), the process varies again. Please consult the Provincial Log Export Analyst for details.

Overview of permit process for all exemption types

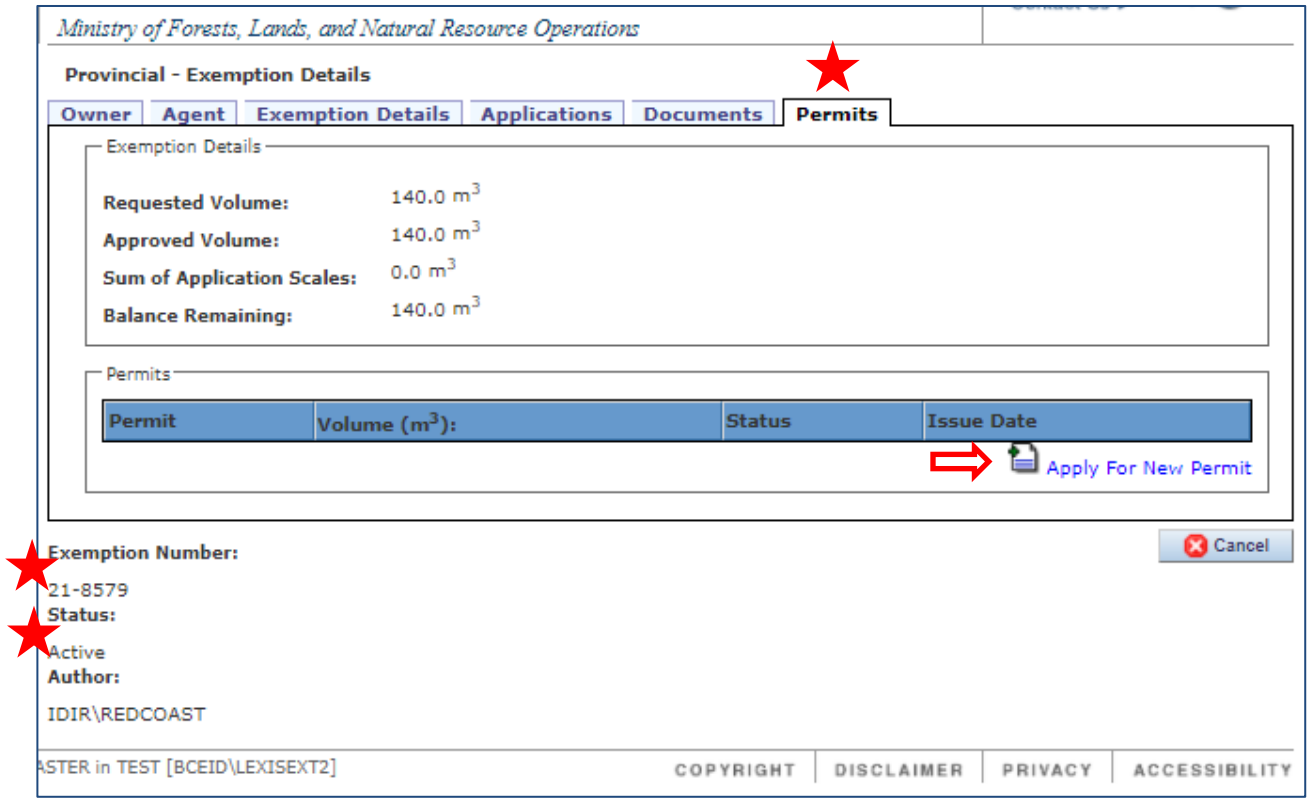
1. Login to LEXIS and open the approved exemption number
2. Select the *Permits* tab to find the 'create a new permit' request button
3. Exemption closes and permit module opens, transferring relevant details
4. Permit applicant must complete/attach details, and save the permit request
5. LEXIS will send an automated email notification to the relevant area export office
6. Ministry staff receive notification and review permit request for accuracy
7. The fee in lieu amount for the permit is verified by staff
8. Staff will assign the status of Complete to the permit, and record an invoice and/or payment received
9. Applicant will receive email notification of Completed permit
10. The applicant can see/save a PDF copy of the Provincial Permit in LEXIS ready to include with the federal export permit application

Permit against a Ministerial Order exemption

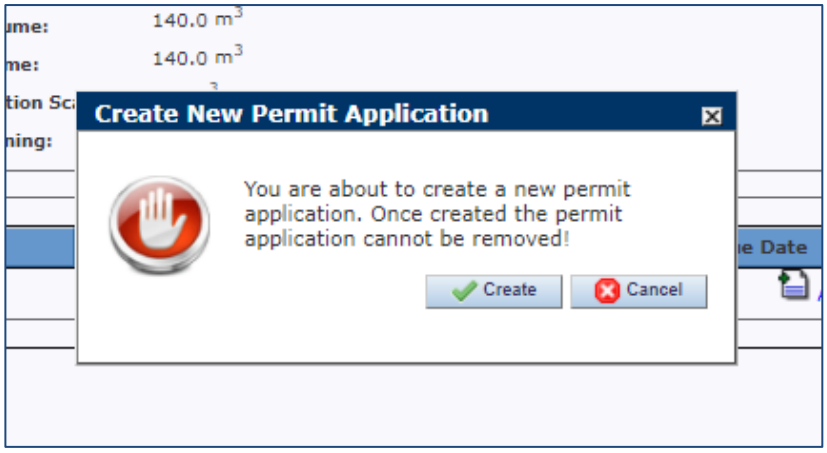
The permit application is online using LEXIS. The format of the permit requested includes the information required by the Government of Canada to support an Export Permit for goods leaving Canada. Provincial permits must be requested online.

The user must start from an approved exemption with Active status. The applicant will have received an email notification with the approved exemption number. Search for and select to open the appropriate exemption number, then select the *Permits* tab.

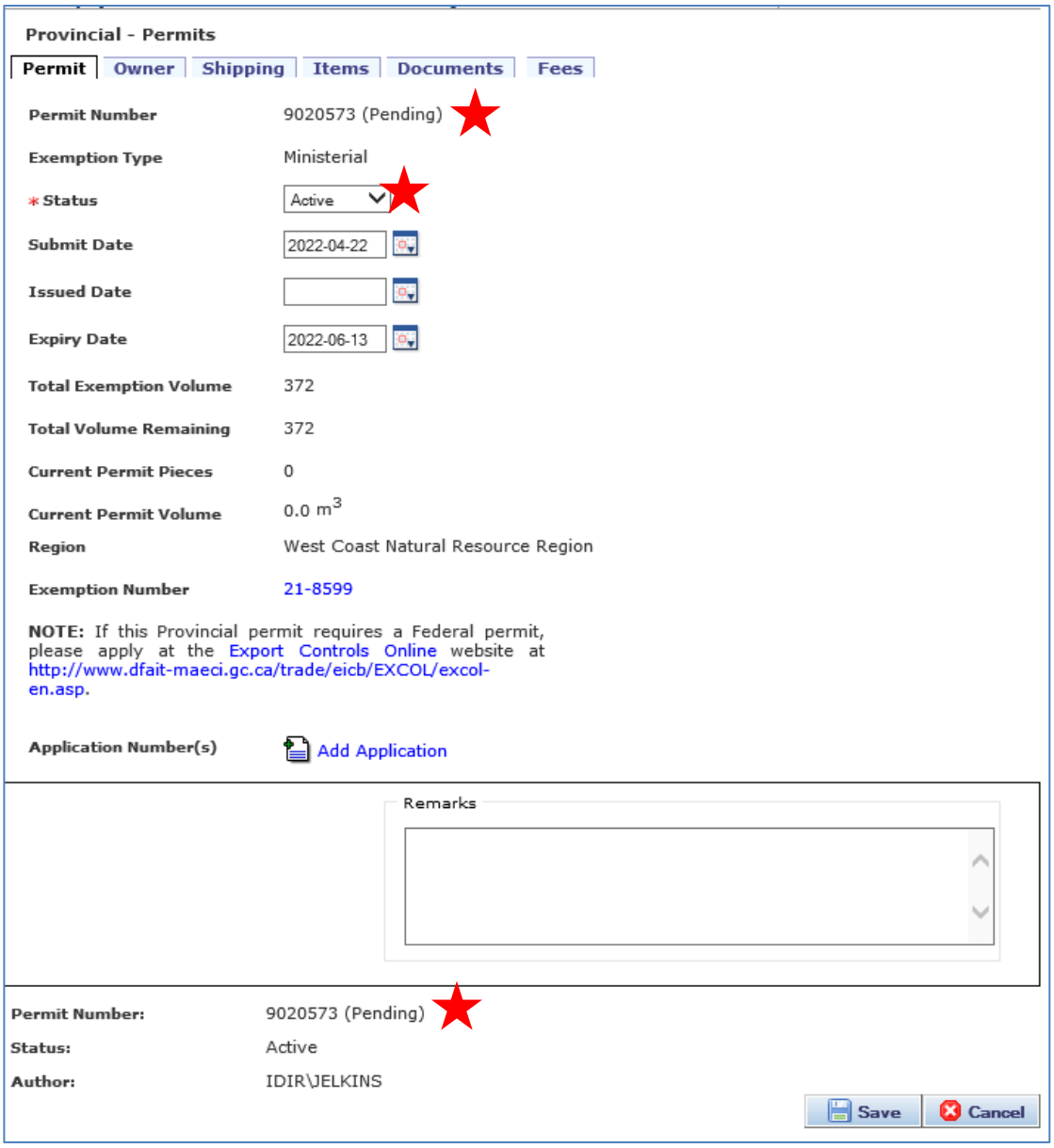
To initiate a permit request, select *Apply for New Permit* from an open exemption.



A dialogue window will open asking for confirmation to proceed by clicking the *Create* button. Selecting Cancel will remove the request for a new permit.



Once confirmed, a *Provincial – Exemption* module will close, and the *Provincial - Permits* module will open on the *Permit* tab, with a system-assigned Permit number (Pending) in Active status.



Permit tab

The permit tab gives an overview of permit. It lists the permit number and status, information about the associated exemption and permit totals, if any.

- Permit Status: All new permit requests are set to *Active* by default and have 'Pending' beside the number until approval. When a permit is approved, the status is changed to 'Complete' by staff. After the permit's Expiry Date, the system will automatically change the status to 'Expired'.
- Exemption Type: Displays the type of the exemption this permit request came from i.e., Ministerial
- Submit Date: Is the date the permit request is received and is automatically completed, but is editable
- Issued Date: Will remain blank until it is approved when staff must select the date
- Expiry Date: Will default to 180 days from the Issued Date, or, the Expiry Date of the exemption, whichever is first. This field is editable.
- Total Exemption Volume: This automatically transfers the total volume the exemption was approved for

- Total Volume Remaining: Indicates how much of the exemption volume remains unattached to any completed permits
- Current Permit Pieces and Current Permit Volume: These totals will complete as volume/pieces are added in Summary of Scale
- The Exemption Number associated with this permit; when the number is blue in colour, the user can link back to the exemption at the click of a button.

Add Application to permit

As a permit may have more than one application attached, they will be listed here. If none are yet attached, the user must indicate which should be attached before the permit request can be submitted for approval.

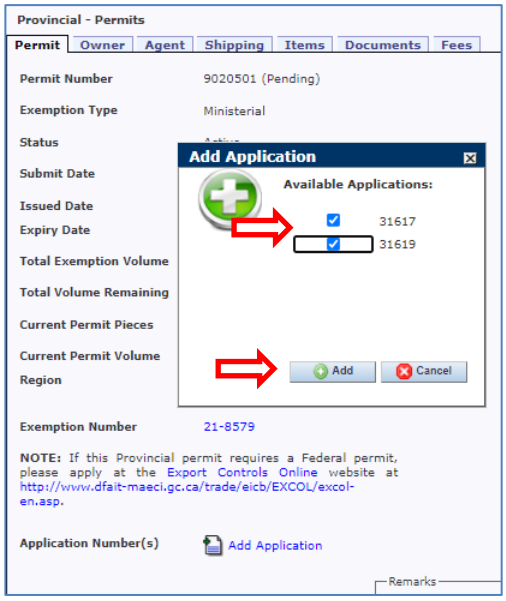
Only applications with package and summary of scale detail will be listed as available. If this is not the case, the user must return to the original application number to add package/scale details. But first, the permit request must be saved as is, and cancel sending the email notification at this time.

> *SHORTCUT* To quickly move from a pending permit to an associated exemption or application:
>
> 1. On Permit tab, select Exemption Number to open it
> 2. Once in the open Exemption, select Applications tab
> 3. Select the Application Number you want to open

See the process to add packages/scale in section "Add Package Details and Summary of Scale" in this manual and then return to the pending permit to complete the request.

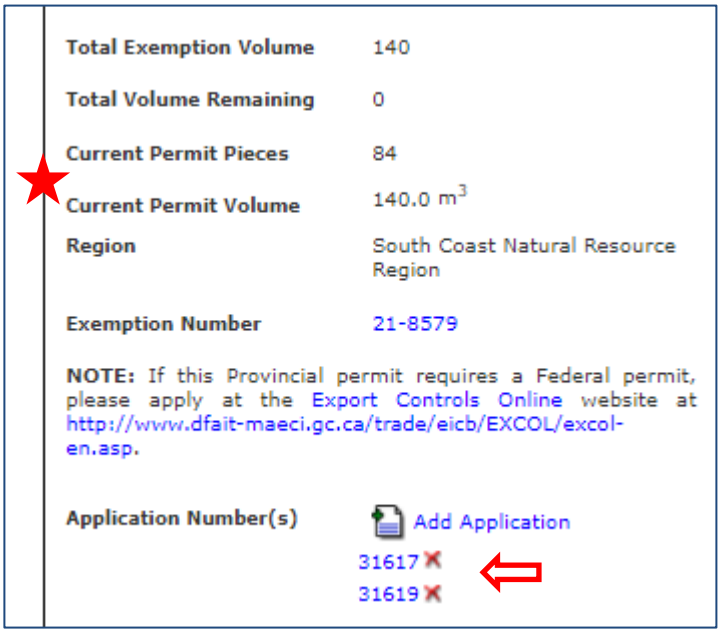
Applications can be added to the permit application by selecting *Add Application* icon. A new dialogue window will open, listing Available Applications.

Tick the box beside all application number(s) to be included.



Selecting the Add button will confirm the addition. Once the application(s) is added, it will be listed and will display in blue, allowing the user to link back to it easily. Note the red 'X' beside the application numbers enables the user to delete the application, if necessary.

If successfully added, Current Permit Volume and Pieces will also update with the amounts from the application package(s). If an application isn't listed, it indicates there is no Summary of Scale in any of the packages in the application(s). This can be resolved by adding packages/scale to the application – see section "*Items* tab" for more info.



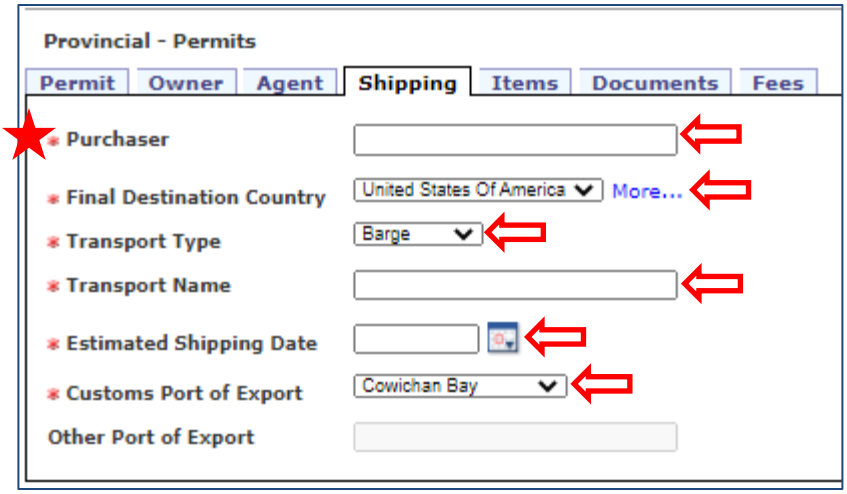
Owner/Agent tab

Under the *Owner* tab, contact information can be reviewed. If the applicant is different than the Owner, a separate Agent tab will also display with the contact information. The contact information will update as per the info on the attached application(s).

Change the Client Location (CL) code if invoice is to go to different address (same company) than on Permit. You cannot change the client number, but client location codes are editable per the dropdown.

Shipping tab

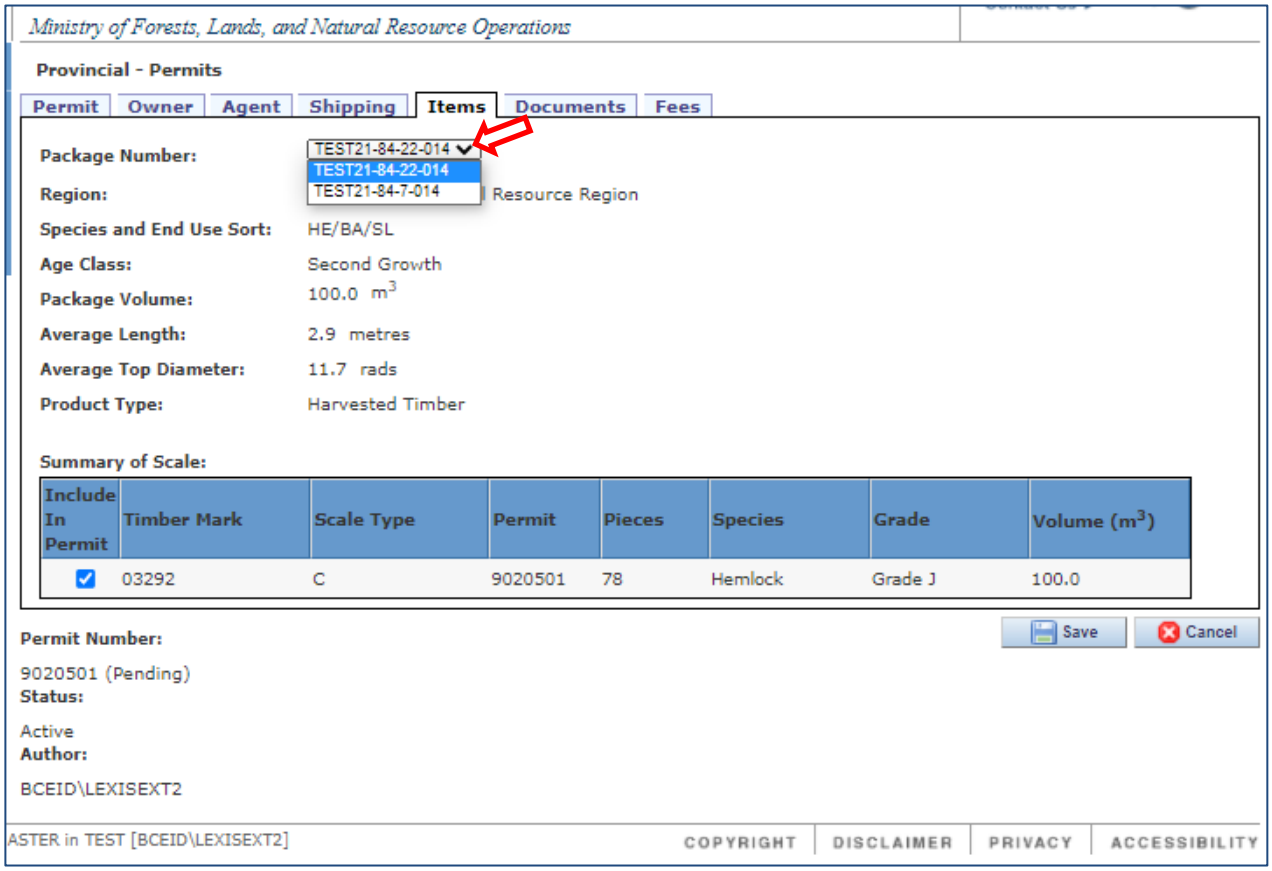
The shipping information must be complete before a permit request can be saved, as marked with red asterisks.



- If possible, please add city name when adding Purchaser name
- The dropdown menu for Final Destination Country defaults to the most common countries, but a longer list is available by selecting 'More…'
- The dropdown menu for the list of Canadian 'Customs Port of Export' is long, but if a different exit point is required, please select Other (listed alphabetically), where you will be required to complete the "Other Port of Export" field

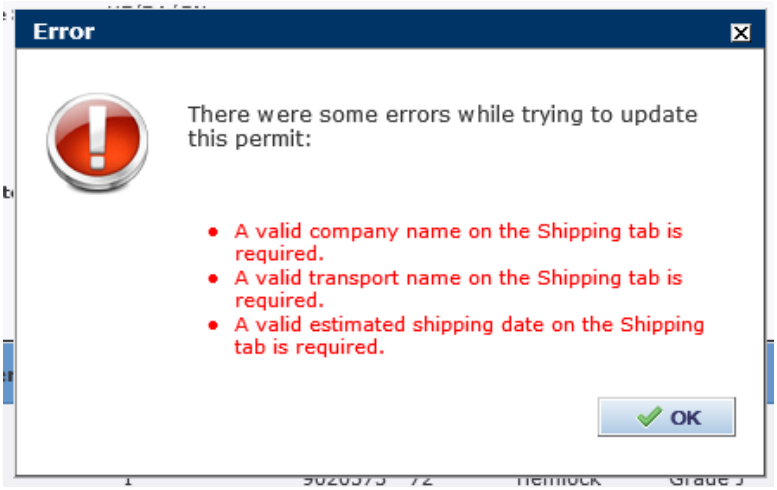
Items tab

Under the *Items* tab, package/boom information can be viewed, including the Summary of Scale. When several packages exist on this permit, the *Package Number* drop down box can be used to select and view the scale details of an individual package. The Summary of Scale must be complete before the permit can be approved.

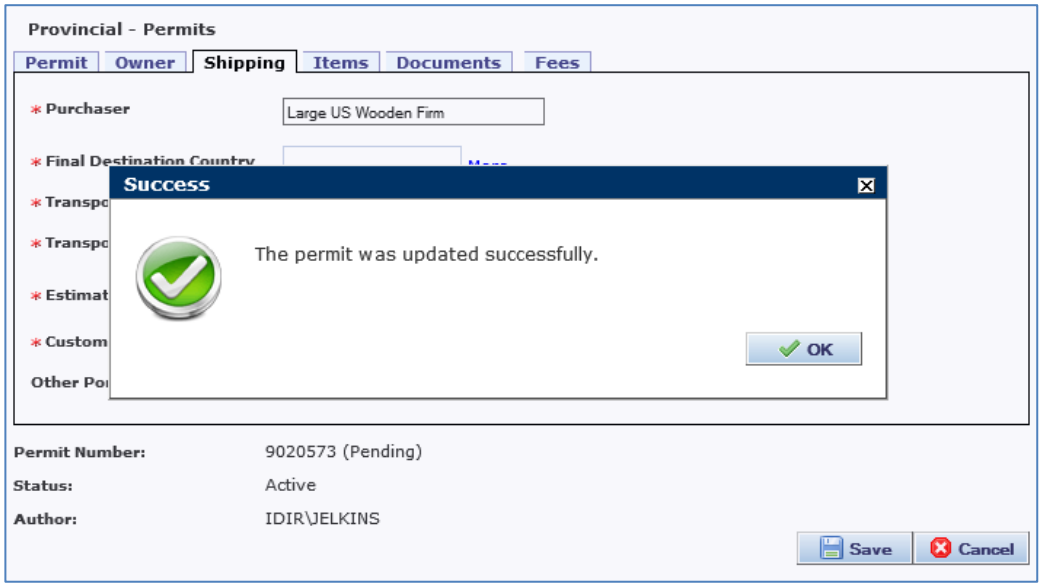


If there are no packages with summary of scale detail from the original application number, user will have return to the application to add the package/scale details.

Before that is possible, the permit request must be saved by selecting the Save button in the bottom right corner. If user has neglected to complete the shipping information before the save, an error message will open as a reminder.



Select OK to close that window and return to the *Shipping* tab to complete missing information. Once complete, user can select the Save button again. A new window will open to confirm the save.



Once the permit is saved it is easy for the user to return to the application.

SHORTCUT

To quickly navigate from a pending permit to an associated exemption or application:

1. On Permit tab, select Exemption Number to open it
2. Once in the open Exemption, select Applications tab
3. Select the Application Number you want to open

See section "Add Package Details and Summary of Scale" in this manual above for the process and return to the pending permit to complete the request.

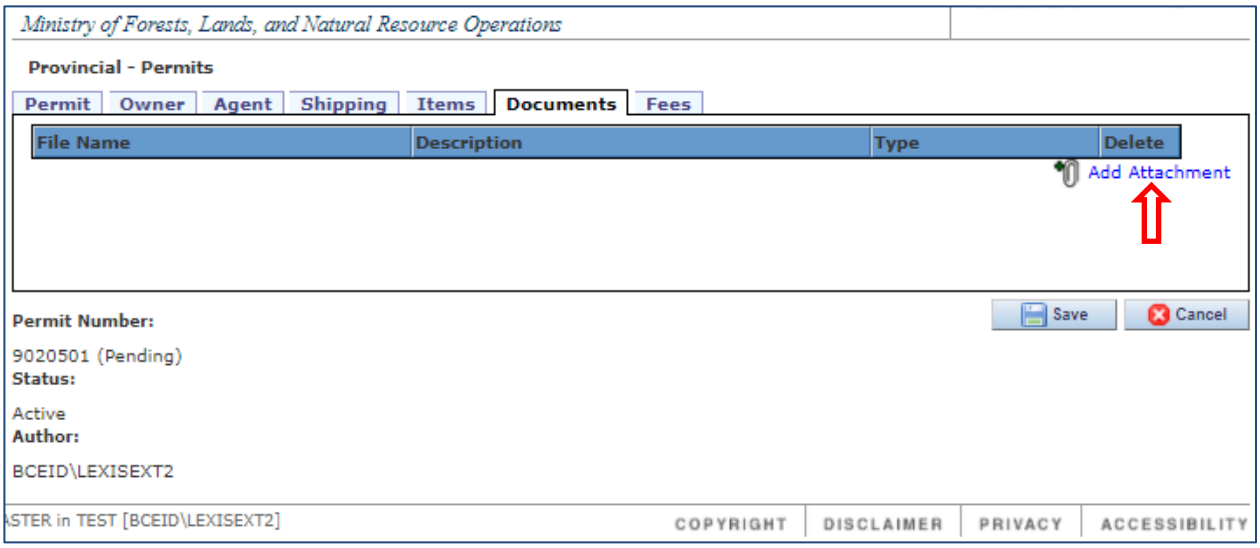
Documents tab

This tab allows an applicant to upload scale summary, or other documentation associated with the permit application.

Any documentation associated with the original application for exemption will also be displayed here.

Add any necessary documentation on the Documents tab e.g., Summary of Scale, letters of permission and ownership, etc. Check with your area export office to verify the documents that are required.

Cross reference the section Application for Exemption "Documents tab" in this manual for more details about adding documents.

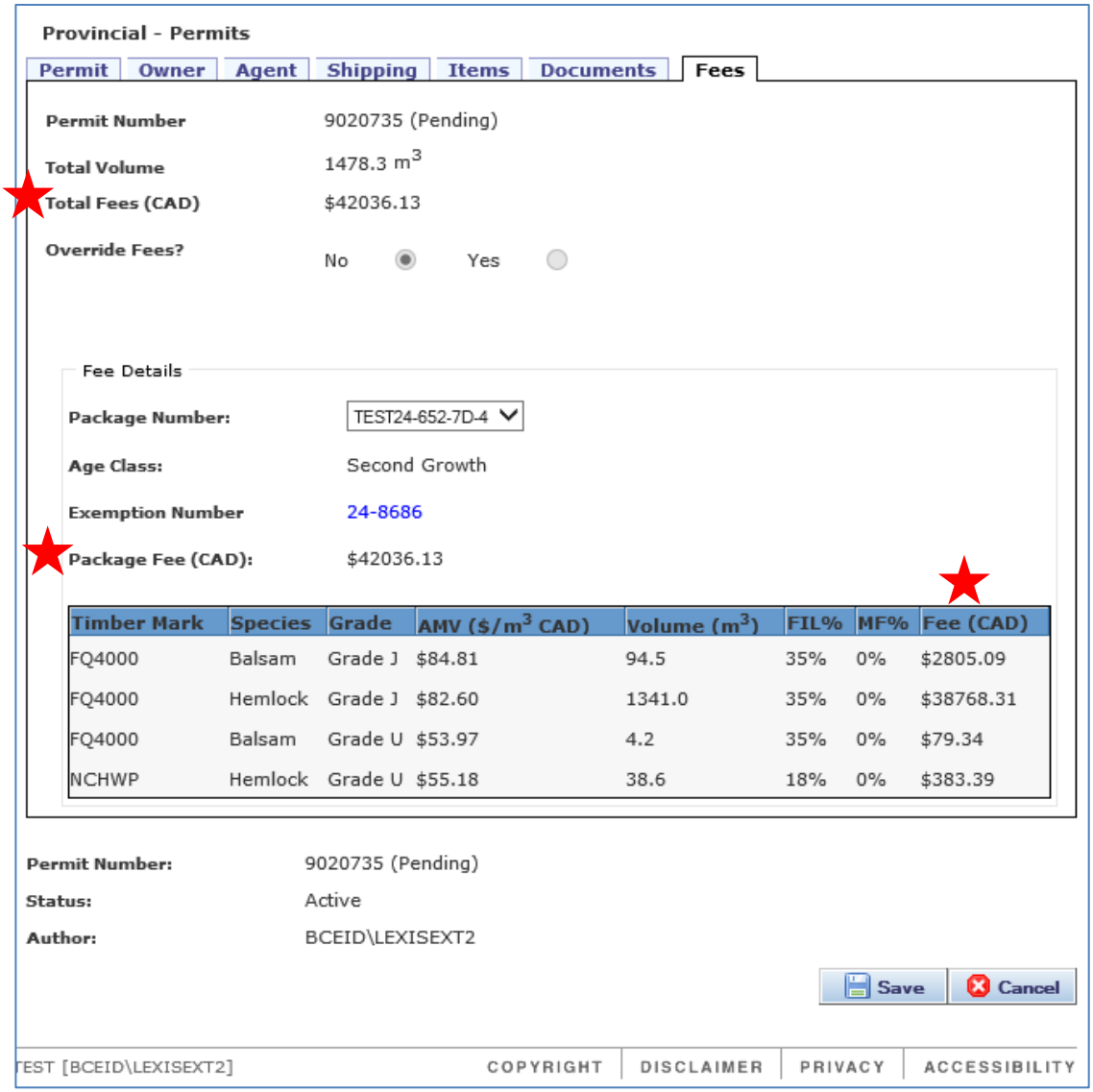


Fees tab

The *Fees* tab shows details of the permit's Fee in Lieu of Manufacture (FiL) amount. At the top is the Total Fees (CAD) amount for the permit and is a total all Package Fee values included on the permit.

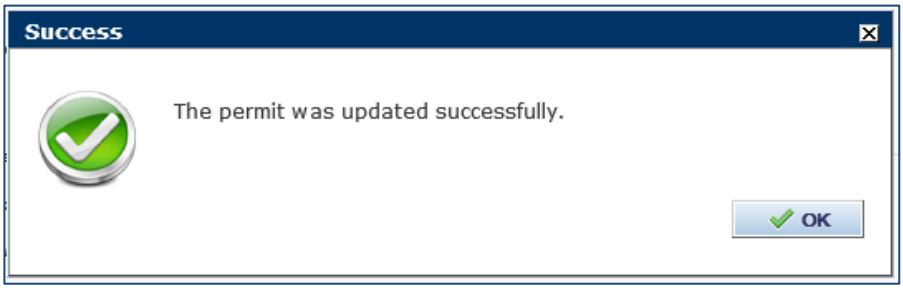
In the Fee Details box below is the Package Fee (CAD), totalled by package number. Below that and for each line of scale, the fee value will be calculated based on the AMV, the volume, and the FiL%, as appropriate. This is new with LEXIS 2.11.

Permit FiL values will be confirmed by staff at the time the permit is issued and invoiced accordingly. Fees are not in any way editable by the industry user.



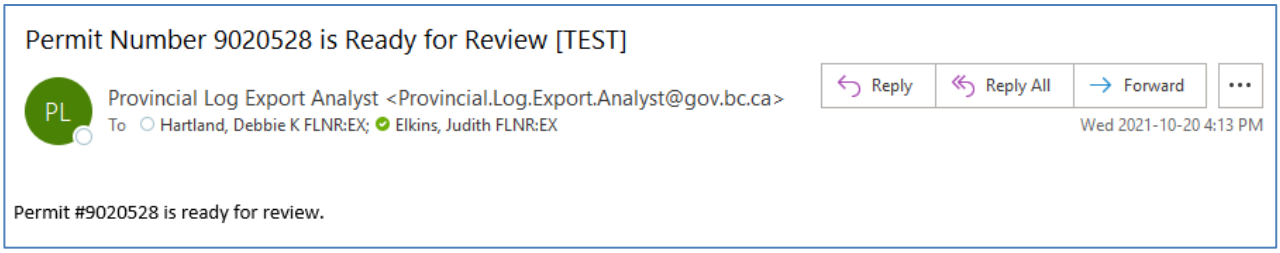
Save and Submit the Permit Request

At this point, the permit request should be saved even if you intend to further process the permit. A new window will open to confirm the permit request is saved.



If user is an industry client, this is the point at which an email notification will be system-generated and sent to the area export office advising there is a request for a permit to approve. They will have the option to cancel the email notification.

Shown here is a sample from our Test environment of the received email.



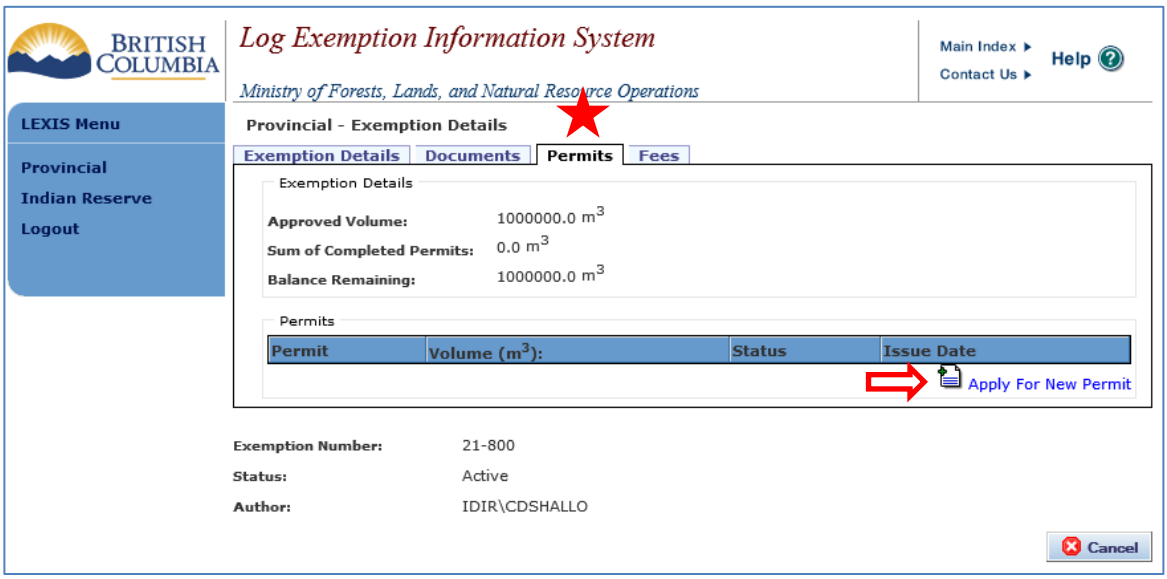
Once saved, the Permit request will be listed on the client's Summary page in the My Permits table. It can also be found using Permit Search for both staff and the client.

Permit against a Blanket Order in Council exemption

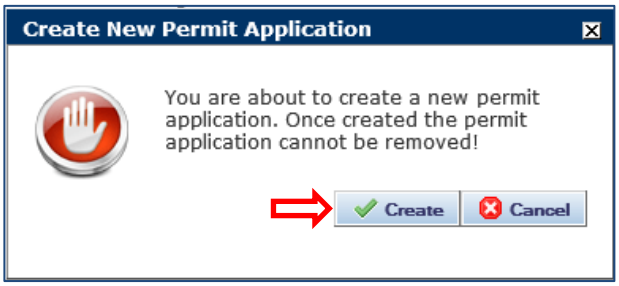
Only a qualifying timber mark may be used on a permit request in LEXIS and will be verified. The user must start from the known Blanket OIC (BOIC) exemption number open in LEXIS.

Details of the existing BOIC exemptions can be found on the Blanket Exemptions website at http://www2.gov.bc.ca/gov/content?id=FD50B4FD835D4367980DC40E9111A4CF.

To initiate a permit request, search for and select the appropriate BOIC number, then select the *Permits* tab. On the right side you can select *Apply for New Permit*.



A dialogue window will open asking for confirmation to proceed by clicking the *Create* button. Selecting Cancel will remove the request for a new permit and take you back to Permits tab.



Once created, the Exemption module will close, and the screen will refresh to open the *Provincial - Permits* module.

The Permits module can be navigated using the *Permit*, *Owner/Agent*, *Shipping*, *Items*, *Documents* and *Fees* tabs:

Permit tab

The new *Permit Number* will be system generated when the Permit is saved.

The *Exemption Type* will display Blanket OIC and the BOIC number will be displayed accordingly. Note there is a hyperlink to the Exemption Number (further down).

Status of Active is assigned to any new permit application.

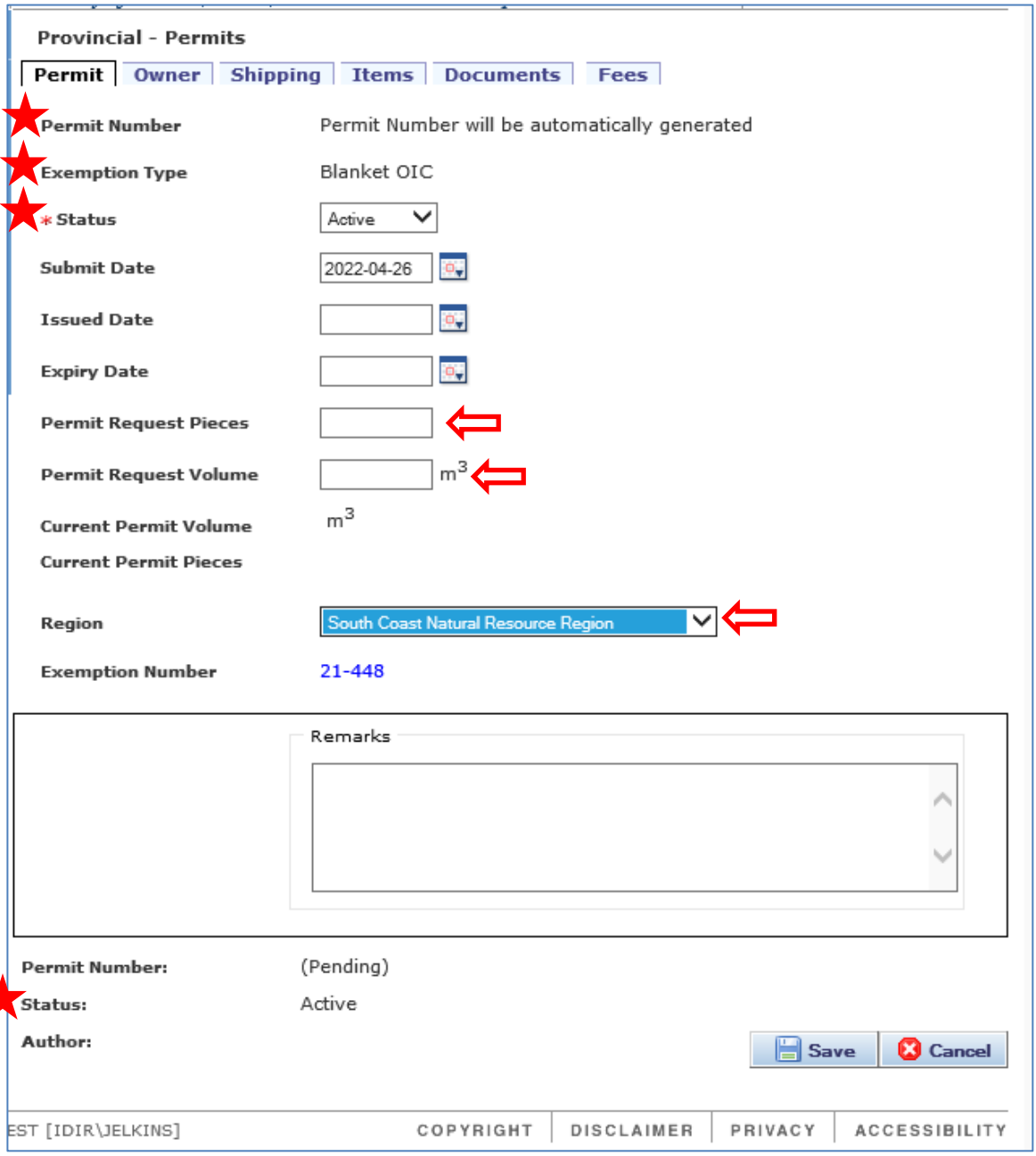
Submit Date will auto complete as today's date but is editable for staff only.

Both *Issued Date* and *Expiry Date* will remain blank until the permit is issued.

User must enter a grand total maximum value for both *Permit Request Pieces* and the total *Permit Request Volume* on this permit. Note that *Current Permit Volume* and *Current Permit Pieces* fields will remain blank until the package/scale details are added and saved, providing a cumulative total.

The most relevant *Region* must be selected from the dropdown menu.

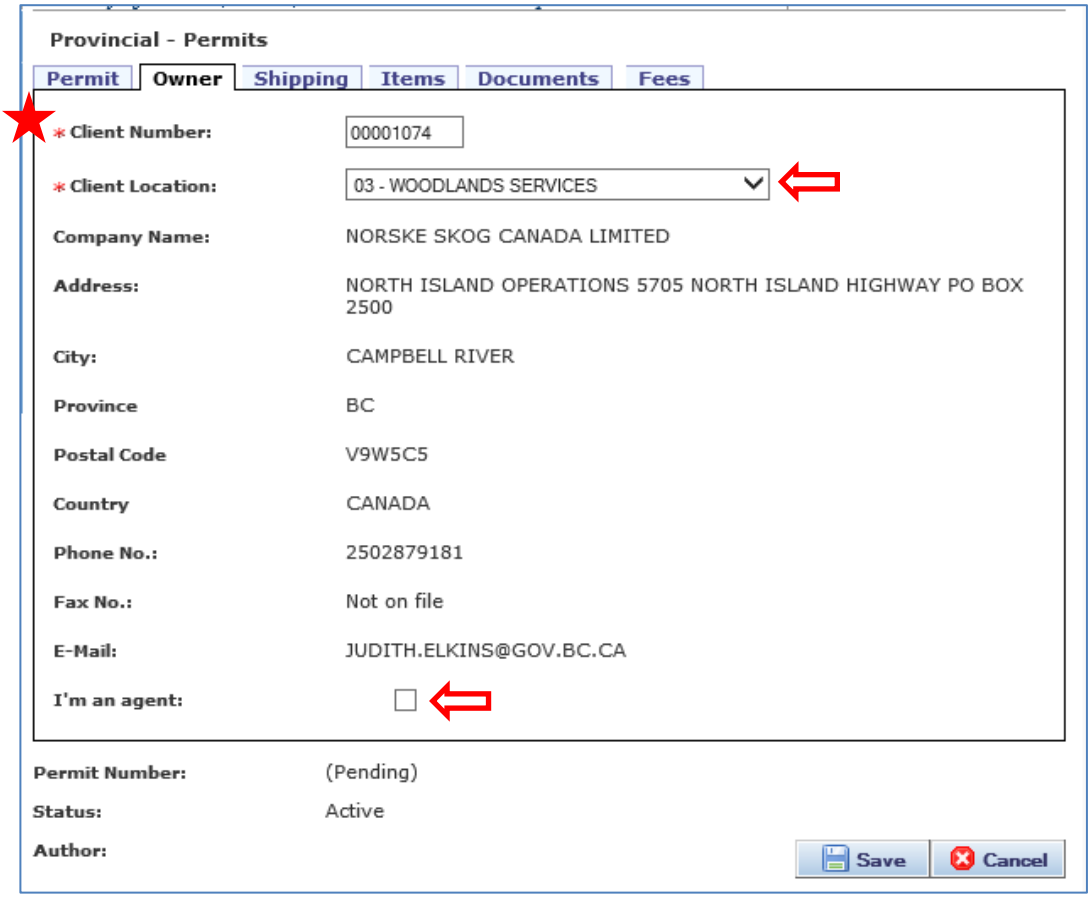
The Remarks field is available for any notes that all users can see.



Owner/Agent tab

The *Owner* tab will require the client number, and if the company has more than one Client Location code, user may select one from the dropdown. This number will auto complete for industry users. If user is an Agent acting

on behalf of the Owner, select the tick box beside "I'm an Agent" at the bottom. This will open the *Agent* tab where user must enter the correct Agent client number and location code. Back on the *Owner* tab, the user must enter the correct Owner information, as both will be the same until you correct it.



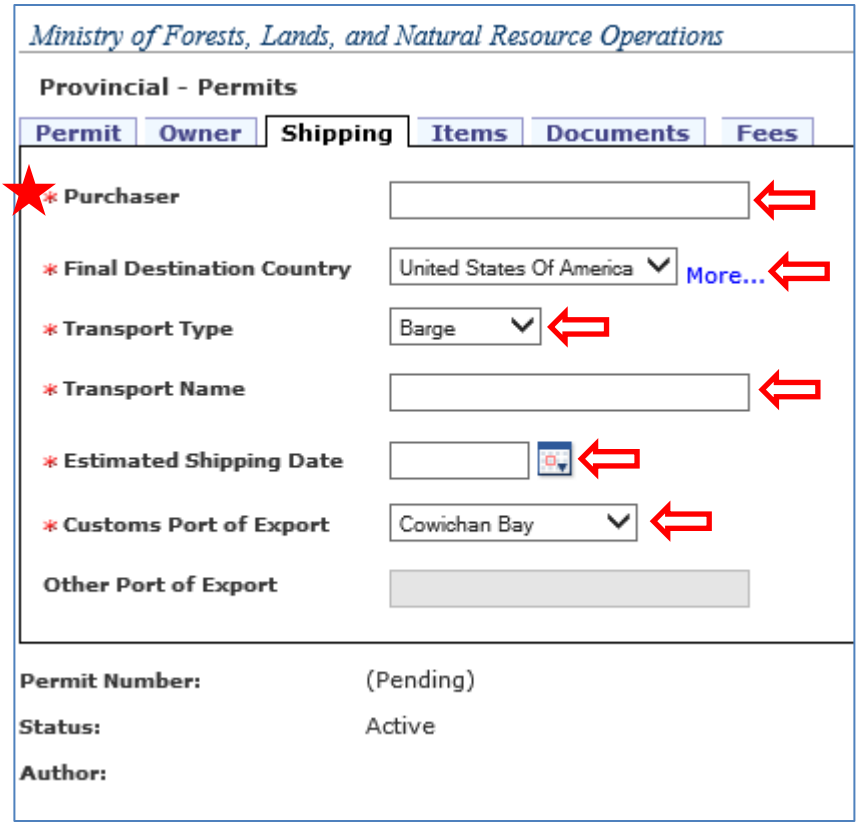
Users with Application Approver profile must enter both the client number and client location code when they enter a permit request on behalf of a client.

Make sure the Client Location code (CL) is correct and change if not. A different CL code might be appropriate, especially when the permit's fee in lieu invoice is to be sent to a different place than the address on the Advertising List.

Shipping tab

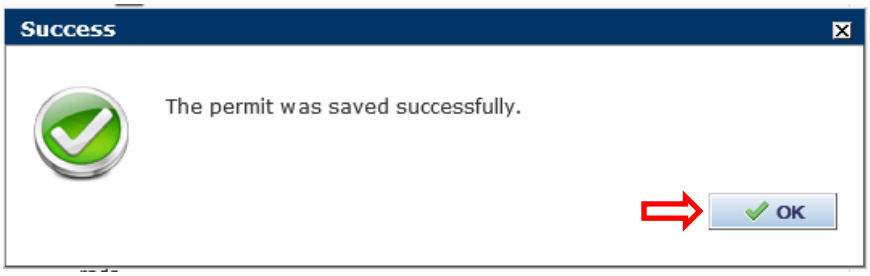
The shipping information must be complete before a permit can be saved and submitted for approval.

- If possible, please add city name when completing the Purchaser name, e.g., Big Company Ltd, Beijing
- The dropdown menu for Final Destination Country defaults to the most common countries, but a longer list is available by selecting 'More…'
- The dropdown menu for the list of Canadian 'Customs Port of Export' is long, but if a different exit point is required, please select Other from the dropdown (listed alphabetically). When Other is selected, you will be required to complete the "Other Port of Export" field.



Save permit request

After completing the information under the *Permit*, *Owner/Agent*, and *Shipping* tabs, the permit request must be saved. Select the Save button in the bottom right, and a new window will open to confirm the permit was successfully saved. Select OK button to close that window.



The screen will refresh and assign a pending permit number and return to the Permit tab. The permit number will always be displayed at the bottom with the status in brackets e.g. 9020574 (Pending).

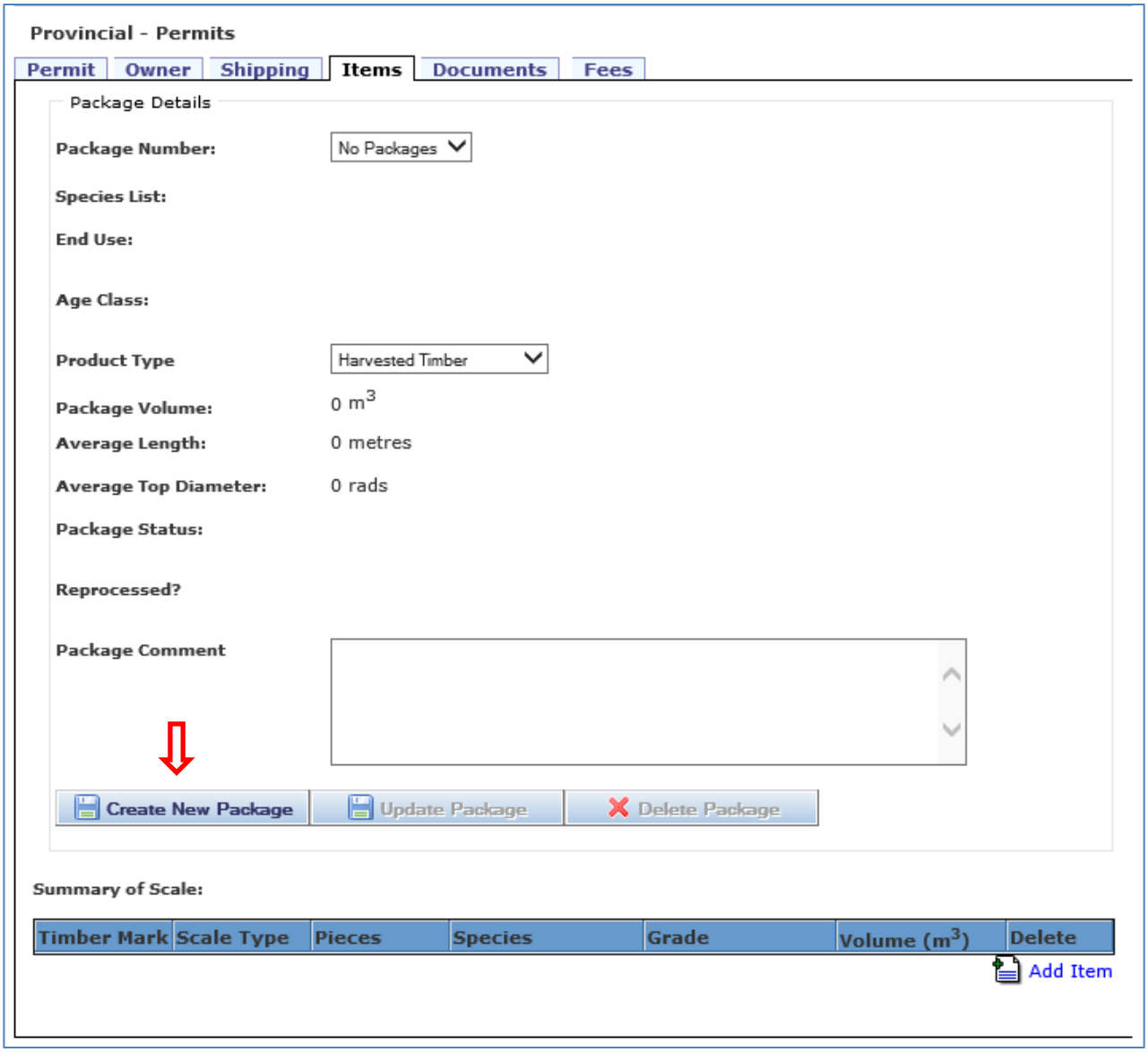
Items tab - adding the Package details

After the initial save, the user must add the package/boom and Summary of Scale information for the permit request to be approved and fees calculated.

The user must create a package/boom with the Summary of Scale details before the permit request can be submitted for approval.

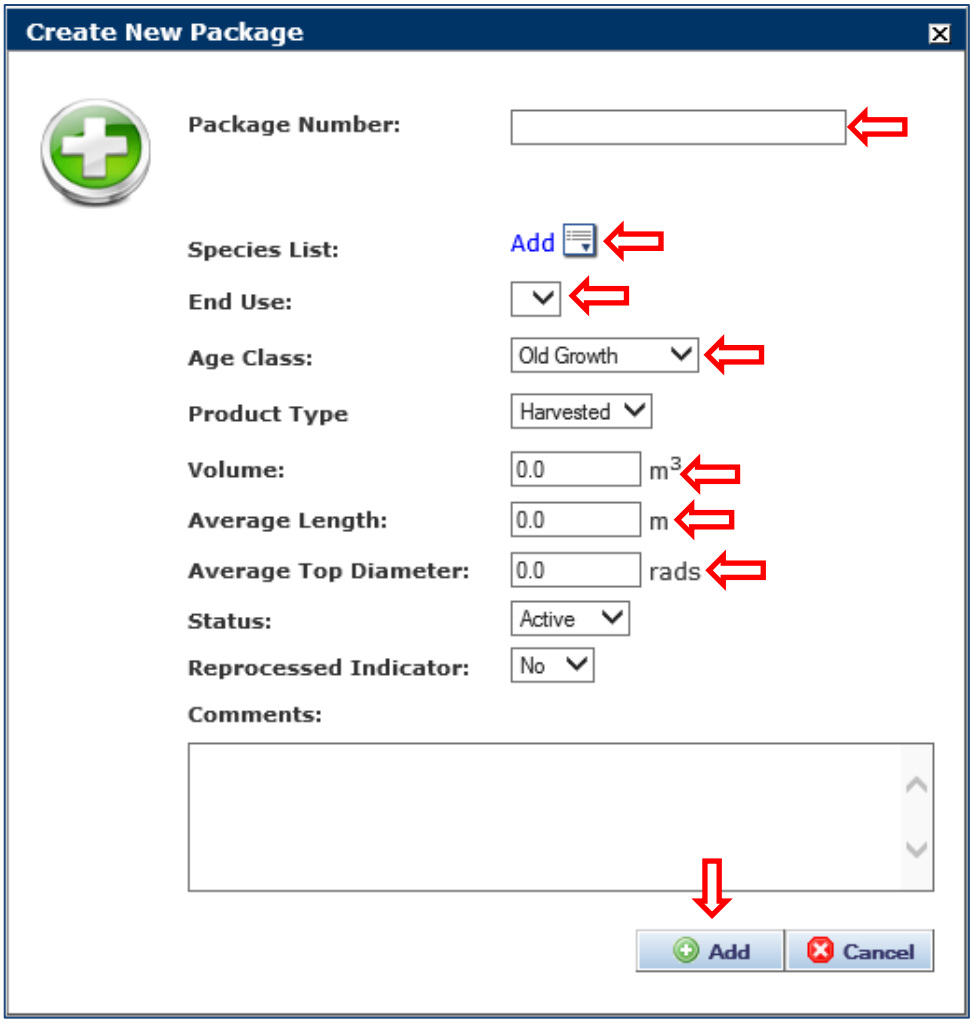
The total volume of all packages must not exceed the volume requested in the permit request. Correspondingly, the total volume of the Summary of Scale in a package must not exceed the stated package volume.

To add package details, go to the Items tab and select the *Create New Package* button.



This will open a small window to enter information about the whole package, usually supplied by the scaling company and should match with the Summary of Scale information:

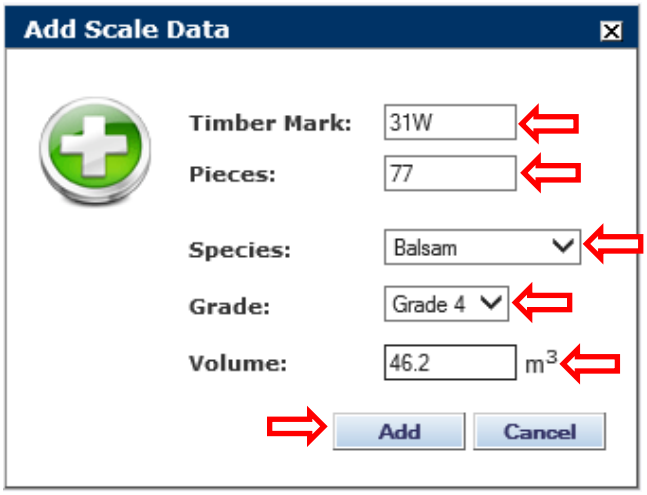
- Package Number – must be unique, can be up to 20 characters long
- Species List – selecting the *Add* button will open a new window to list the species options based on the region selected for the permit, displaying all allowed combinations for your selection. Select each, one at a time, closing the window after all that apply have been selected
- End Use code – Based on the Region selected for the permit and the Species selected above, select the dropdown arrow for *End Use* and select the most appropriate one from the list
- Age Class – select either Old or Second Growth
- Volume – total volume for the package, in cubic metres
- Average Length – average log length for the package, in cubic metres
- Average Top Diameter – average top diameter for the package, in rads
- Status and Reprocessed Indicator fields should remain as they are



Select the Add button to save the new package information. Selecting the Cancel button will remove the package.

For each package created, Summary of Scale data must now be added. For each line item of scale, select the *Add Item* icon, at the far right.

Selecting the *Add Item* icon opens a small window. The *Add Scale Data* window allows you to enter the timber mark, piece count, species, and grade, as well as volume in cubic metres. The Species and Grade options on the dropdown menus will only display those allowed for the region specified on the application.



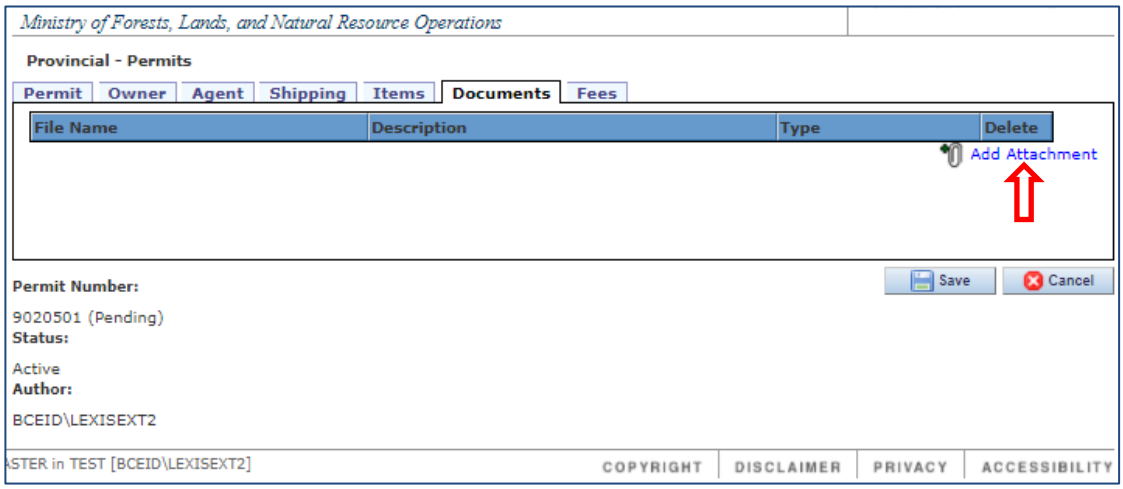
When complete, select the Add button to save the line item to the Summary of Scale. The system will verify if the Timber Mark is valid for the region of the application and return an error if not.

Once saved, the system will also display a cumulative volume and pieces for the package on the Permit tab. The user can then easily see how close they are to reaching the maximum Permit Volume.

Documents tab

This tab allows the user to upload scale, proof of payment, mark ownership, etc., documentation associated with the permit application.

For details about adding documents, see section Application for Exemption "Documents tab" in this manual.

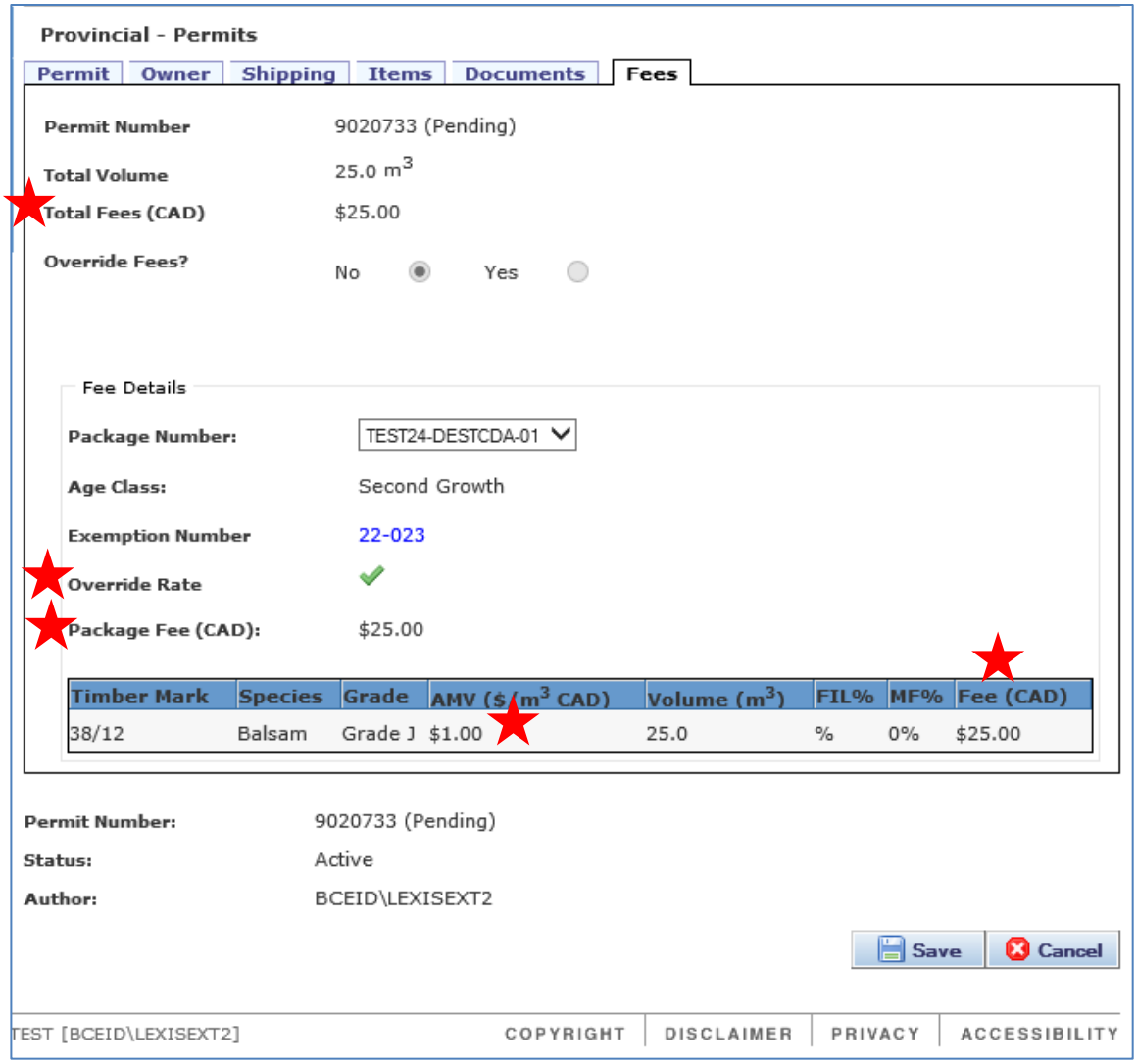


Fees tab

The *Fees* tab shows details of the permit's Fee in Lieu of Manufacture (FiL) amount. At the top is the Total Fees (CAD) amount for the permit and is a total all Package Fee values included on the permit.

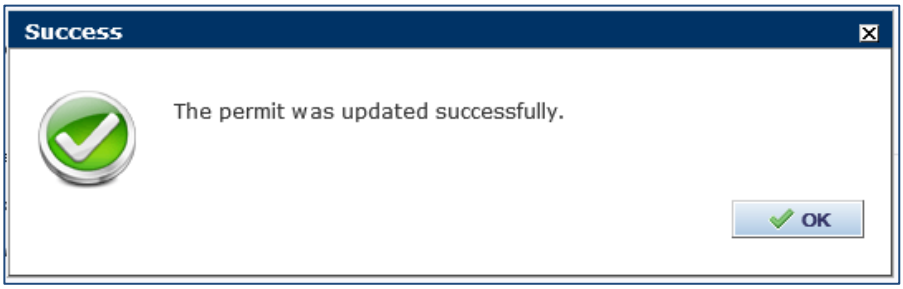
In the Fee Details box below is the Package Fee (CAD), totalled by package number. Below that and for each line of scale, the fee value will be calculated based on the AMV, the volume. If the AMV Override Rate is determined by the conditions of the Blanket OIC, there will be an indicator to flag that and the correct value will be displayed as the AMV. This is new with LEXIS 2.11.

Permit FiL values will be confirmed by staff at the time the permit is issued and invoiced accordingly. Fees are not in any way editable by the industry user.



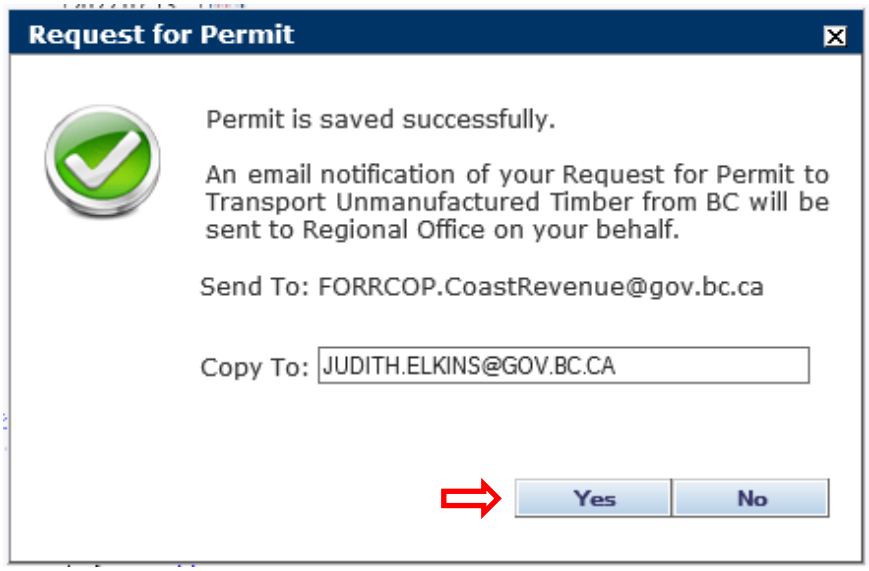
Save and Submit the Permit Request

At this point, the permit request must be saved even if you intend to further process the permit. A new window will open to confirm the permit request is saved. If there is no application attached, or if the attached application has no package and scale information, only the save will be acknowledged with a confirmation message window.



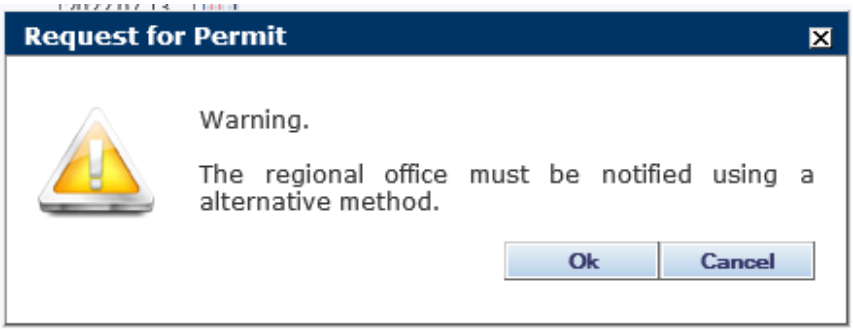
If the user is an industry client, this is the point at which an automatic email notification will be created to the relevant area export office advising them there is a request for permit approval. No email is sent when staff create the permit request.

If both shipping information and at least one application with package/scale is attached, a new window will open to confirm the save and indicate the system is ready to send an email to the regional office. The 'Copy To" field will be completed with the 'applicant's' email address. If there is an agent with an email address identified on the permit it will go to them, if no agent then the owner gets the copy. The 'copy to' field can be blank or replaced with a different valid email address.



Selecting the Yes button will trigger sending the email(s) and the user should then receive confirmation they were successfully sent. If not, a new window will open with an error message.

Selecting the No button will close the window and cancel sending any email. However, a small new window will open reminding the user the regional office must be advised outside of LEXIS.



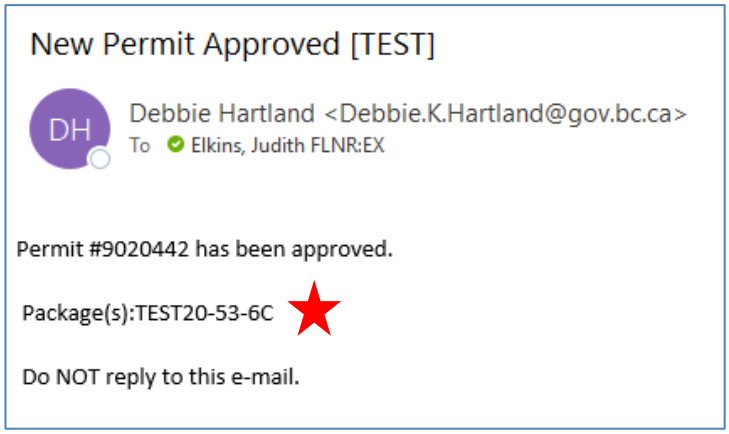
Close the warning message window by selecting the OK button. To exit the Permit, select the Cancel button in the bottom right corner.

A separate automated email notification will be sent to the applicant after the permit has been approved.

Review and Print Approved Permit

Email Confirmation of Permit Approval

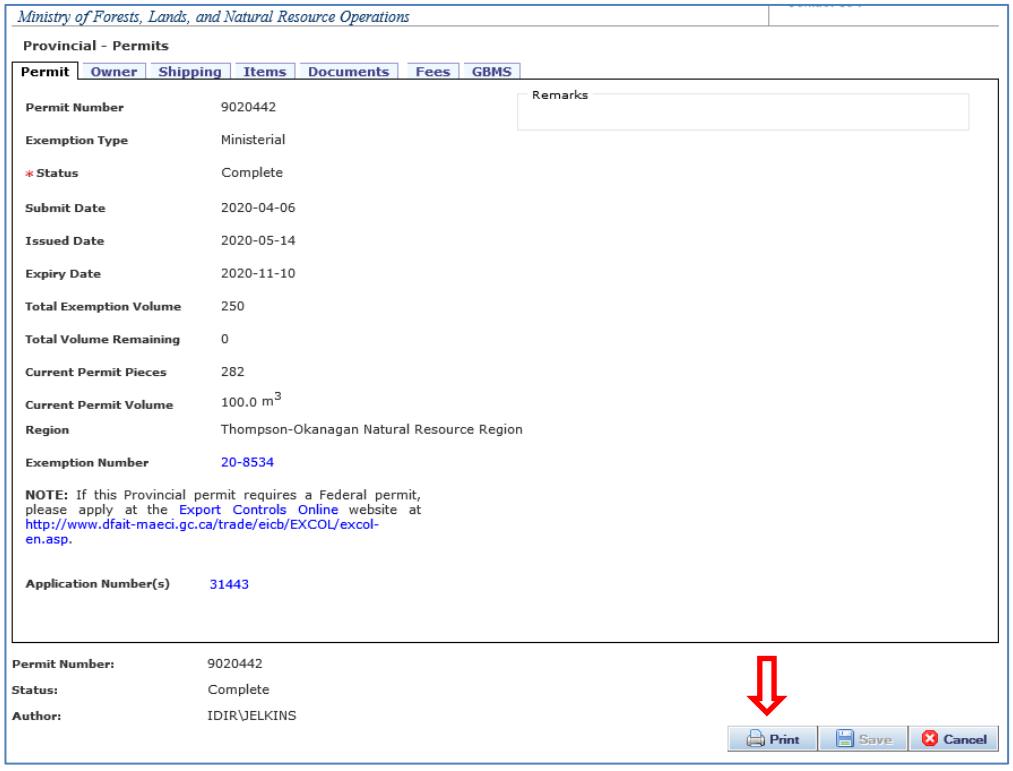
When a permit is approved by staff, the system will automatically generate an email notification from the region to the permit owner (i.e., exemption holder) advising the permit has been approved. The notice indicates the Permit is now in Complete status and the permit can be used to provide backup to an Export Permit from the Government of Canada. The notification will also list the Package(s) included on the permit.



Print or Save Permit

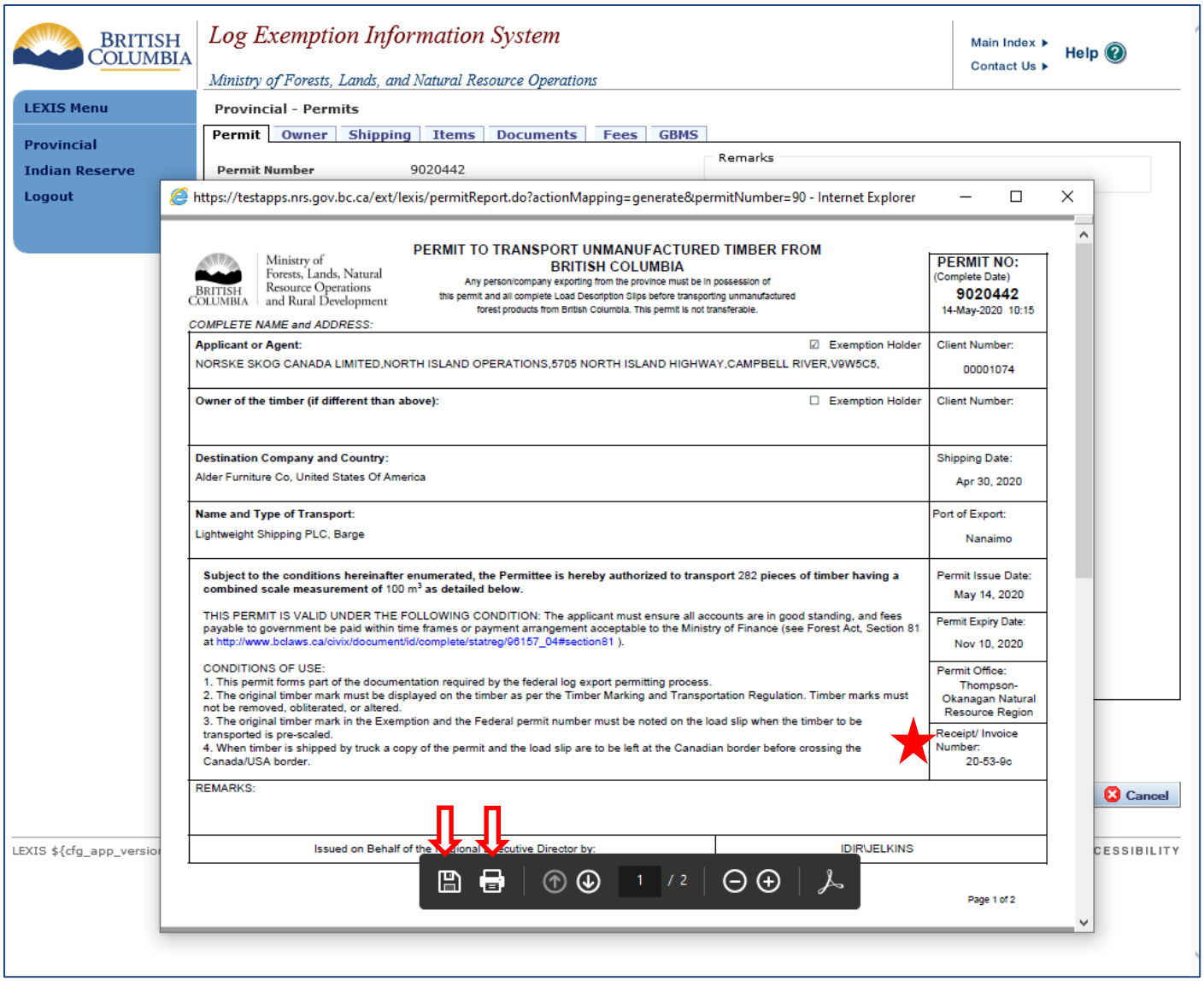
To review a permit in Complete status, search for the permit number either from the home (Summary) page in the My Permits table, or by selecting Permit Search from the LEXIS Menu on the left side. Select the number to open it.

To create the PDF for printing or saving, select the Print button in the lower right corner. The print button will display no matter which tab you are reviewing.



A new window will open with the 2-page PDF. Print or save, as needed.

Note that either the fee Invoice Number or the prepaid fee Receipt Number will be displayed on the first page, depending on the permit.



Page 2 of the PDF version of the completed permit has 2 columns to display the Age Class and Species and End Use sort information by package. Here is a sample of Page 2 from our Test environment (i.e., not real data).

BRITISH COLUMBIA

Ministry of Forests, Lands, Natural Resource Operations and Rural Development

PERMIT TO TRANSPORT UNMANUFACTURED TIMBER FROM BRITISH COLUMBIA

Any person/company exporting from the province must be in possession of this permit and all complete Load Description Slips before transporting unmanufactured forest products from British Columbia. This permit is not transferable.

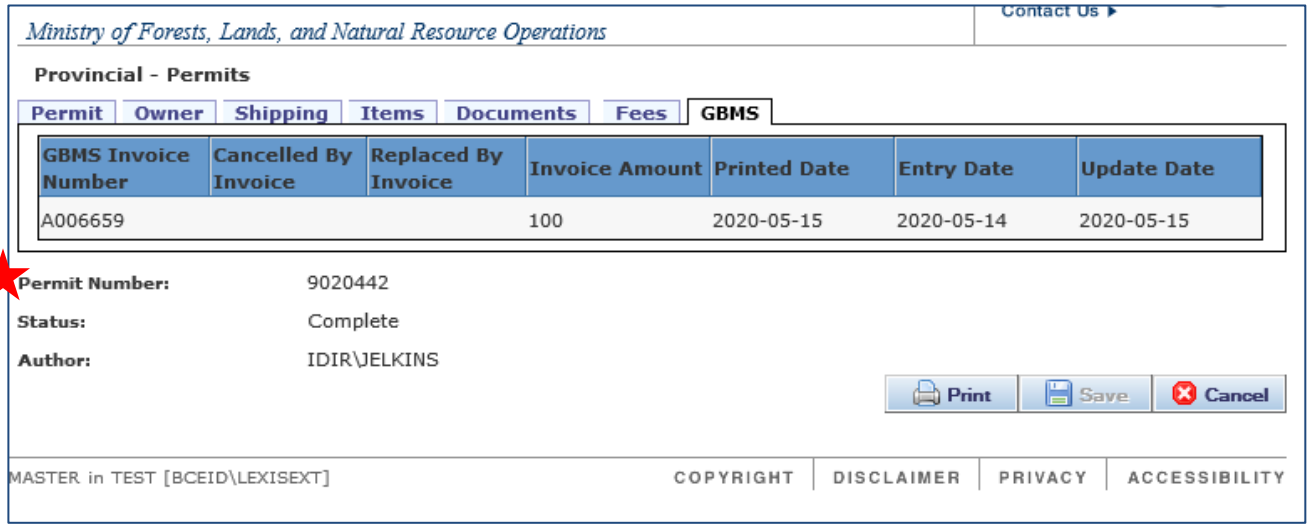
PERMIT NO:
(Complete Date)
9020448
08-Jan-2021 13:51

Approved Exemption No.	Application No.	Boom or Package No.	Timber Mark Holder Name : - Timber Mark	Description of Timber Species - Grade	Age Class	Species End Use	Permit Pieces	Permit Volume (m^3)
20-8536	31444	FAN19-2	INTERNATIONAL FOREST PRODUCTS: - EC5040, EC5040, EC5040, EC5040, EC5040	Hemlock - H,I,J Balsam - H,I,J	Second Growth	BA/HE/Gang	715	503.4
20-8536	31445	PET20-220-001	PEETOOM: - 06377 LEUPOLD: - 09827, 09827	Fir - H,I	Old Growth	FI/Sawlog	6	20.0
						Total:	721	523.4

Permit Fee in Lieu (FiL) and Invoice tracking on *GBMS* tab

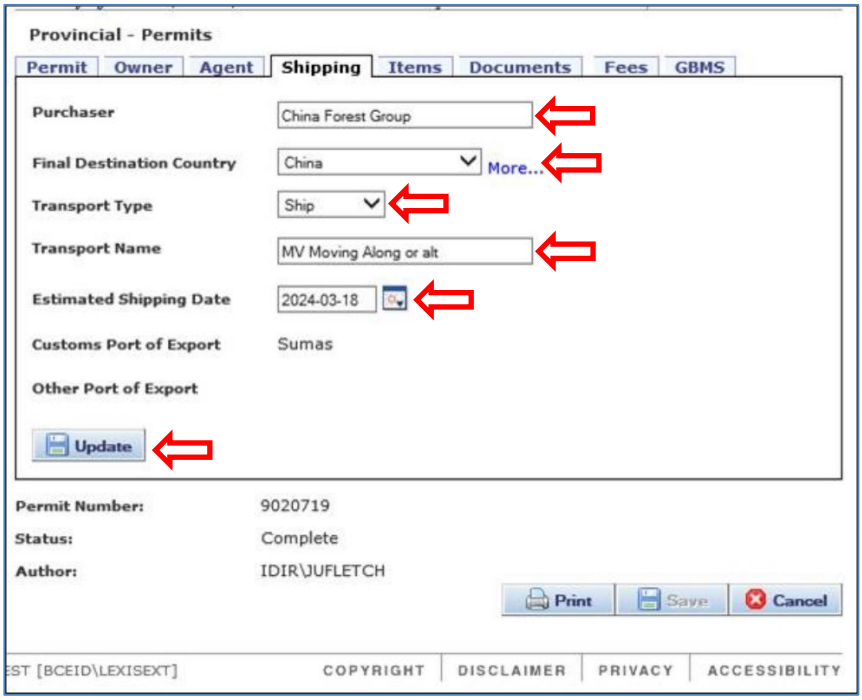
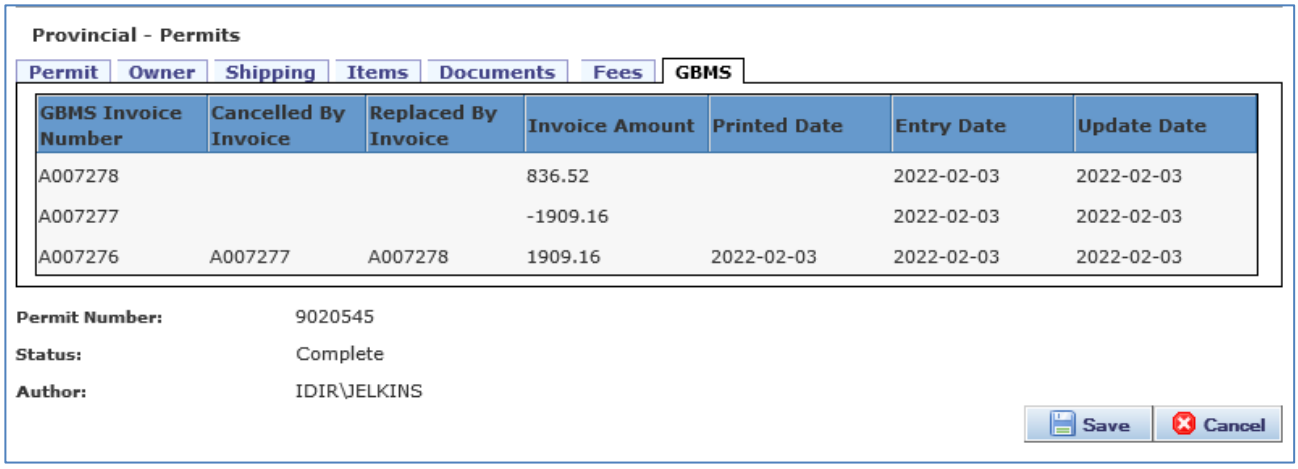
After a permit has been approved and an invoice has been created with the FiL amount due, the General Billing Management System (GBMS) tab will list relevant invoice number(s), dates, and the corresponding FiL value invoiced. For cross reference, the *Fees* tab shows the calculation totals. For any permit requested after the launch of LEXIS 2.11, the component parts of the calculation will be accurately displayed.

GBMS staff run a nightly batch job that will transfer the invoice data to the Ministry of Finance systems and queue the invoice for printing, and its subsequent mail out. The 'Printed Date' will be updated after the batch job has been completed. Additionally, the Ministry of Finance will mail out a Billing Notice for all issued/printed invoices the day after the Invoice issued date.



Editing the Shipping Information

After receiving a completed permit, some of the shipping information can be edited without changing the status of the permit or involving the provincial export staff. Make the change(s) and select the Update button to save the updated information. The revised permit can then be printed correctly.



Should other changes be required, please contact the area export staff. A cancelling permit and invoice may have to be created, as well as the corresponding replacement for the permit or invoice. All cancelling/replacing invoices will be listed on the *GBMS* tab, and the client will be able to see the information listed chronologically, as shown here: