

## BASIC SYSTEM NAVIGATION

After signing into the Fuels Tax System the Home screen is displayed. The default display is shown below but it can be configured as needed. The Home screen is also known as the Dashboard.

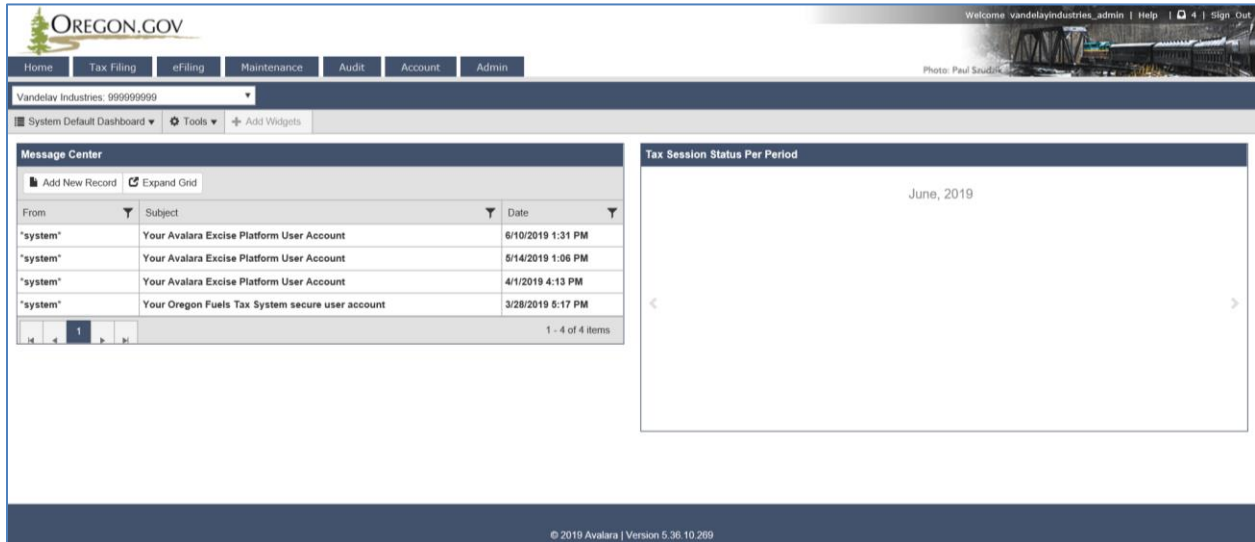


Figure 1. Home Screen

The calendar, as well as other items placed on the Dashboard, are known as Widgets.

At the upper left corner of the screen, a blue bar may be displayed indicating “Widgets have been hidden due to access level restrictions”. Additional widgets may be added by selecting the “Tools” drop-down menu. From this menu select “Create Dashboard”.

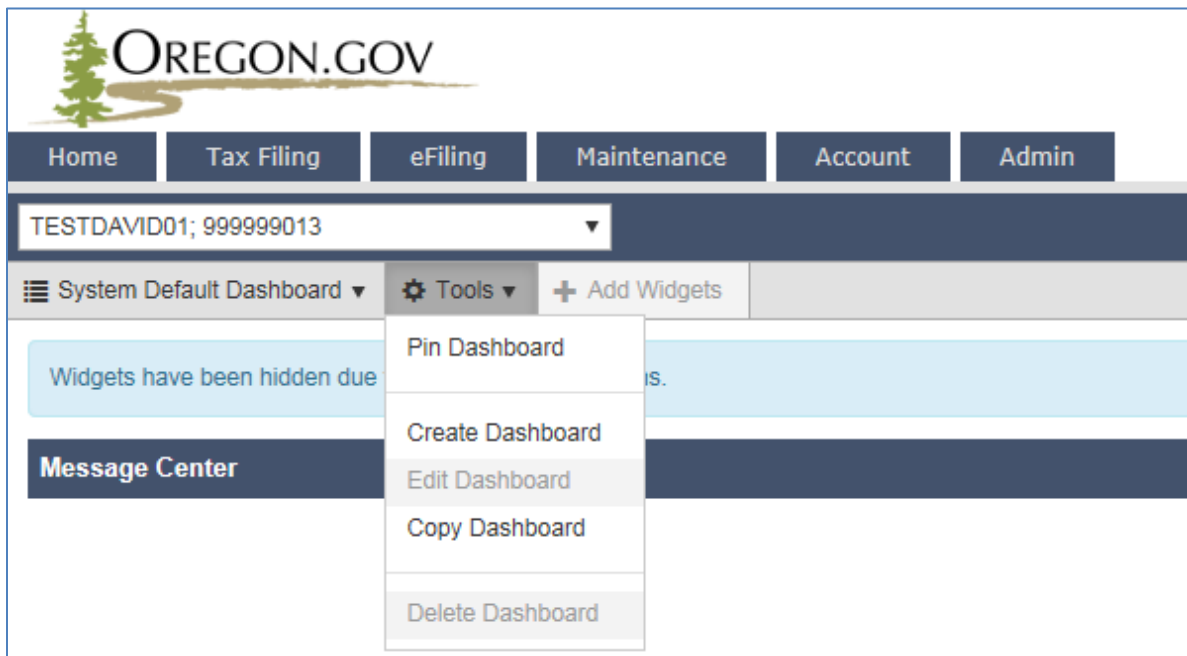
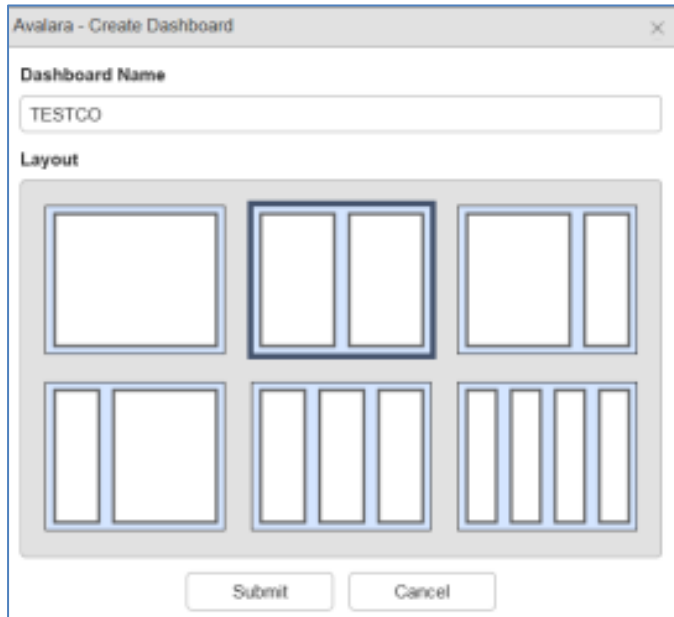


Figure 2. Dashboard Tools menu

This will bring up the option to give the dashboard a name and select a specific layout.



Enter a dashboard name, select from one of the six layout options, then click the “Submit” button at the bottom.

This will bring up a blank screen, and the “+ Add Widgets” option next to the “Tools” menu is now available.

Figure 3. Create dashboard

Click on this option to select the widgets you want on your dashboard.

There are five widgets to choose from:

- Calendar
- Message Center
- Tax Session Counts per Period
- Tax Session Status per Period
- Tax Session Workflow

Click on a widget and then click the “Add Widget” button at the bottom of the screen. The widget will appear behind this window on the upper left of the Dashboard. Select other widgets in this same manner and then click “Close”.

Once the widgets are added to the Dashboard, you can ‘drag and drop’ to put them where you want them within the screen layout.

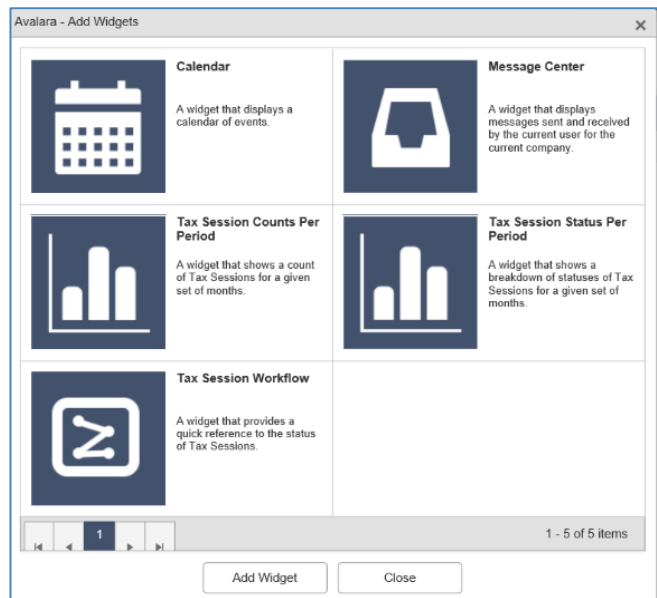


Figure 4. List of widgets

The ‘mini menu’ to format each widget is at the upper right corner of the widget’s title bar. Hover your mouse on the right side to reveal the formatting options.

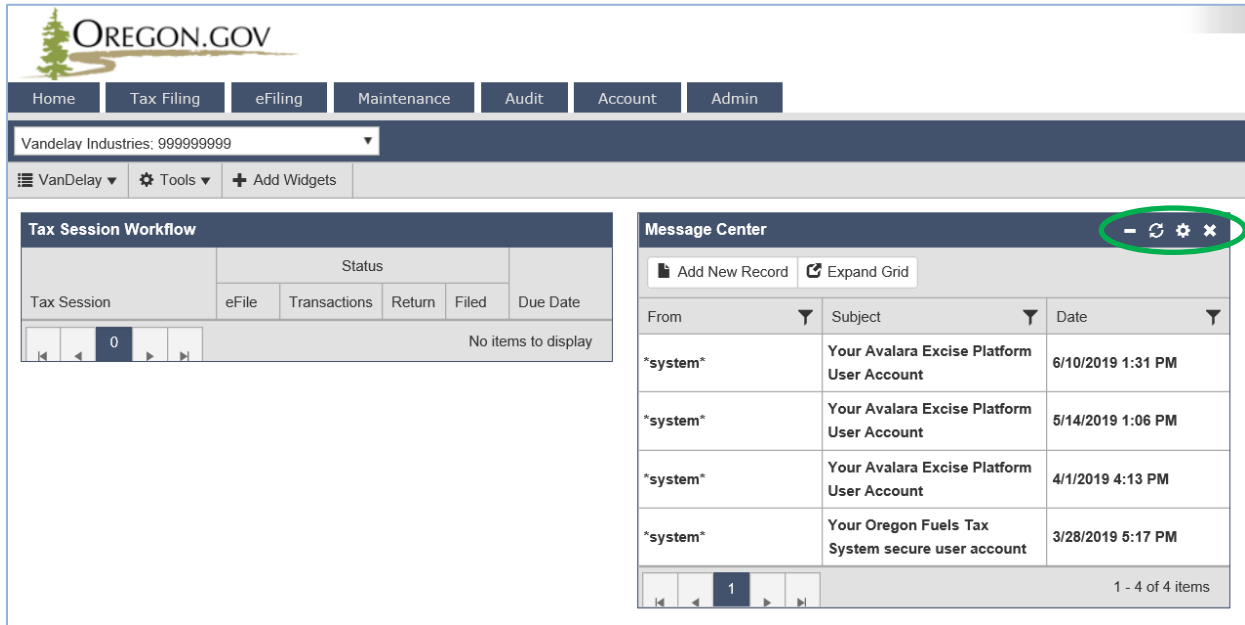


Figure 5. Widget menu

From left to right the options are:

Minimize the widget on your home page

Refresh the widget data (also auto-refresh options)

Format the widget (color, number of items to display,

Remove the widget (can be restored at any time)

The Dashboard shown below has three widgets in a two-column format. The title bar names have been modified, along with the bar display colors. Refresh periods for each widget can be set separately.

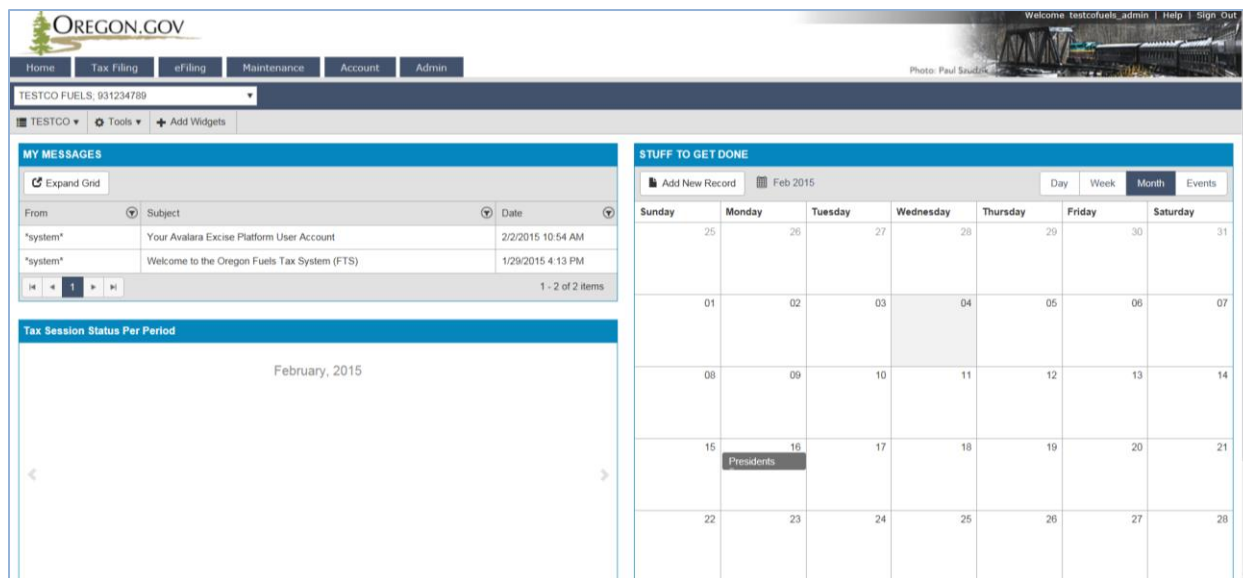


Figure 6. Dashboard with widgets sample screen

At the top left of your screen is a set of tabs for various functions.

The first tab returns you to your Dashboard. The second tab is “Tax Filing”.



Figure 7. Tax Filing drop down menu

From this tab you can:

View or add a tax report (Tax Sessions)

Review or add schedule transactions (Transactions)

Check transaction validations

View the tax report, and

The “eFiling” tab provides a screen to upload tax report schedule detail in XML format. An XML file contains the licensee information and the reporting period, so you do not have to create a specific tax session to upload these files.

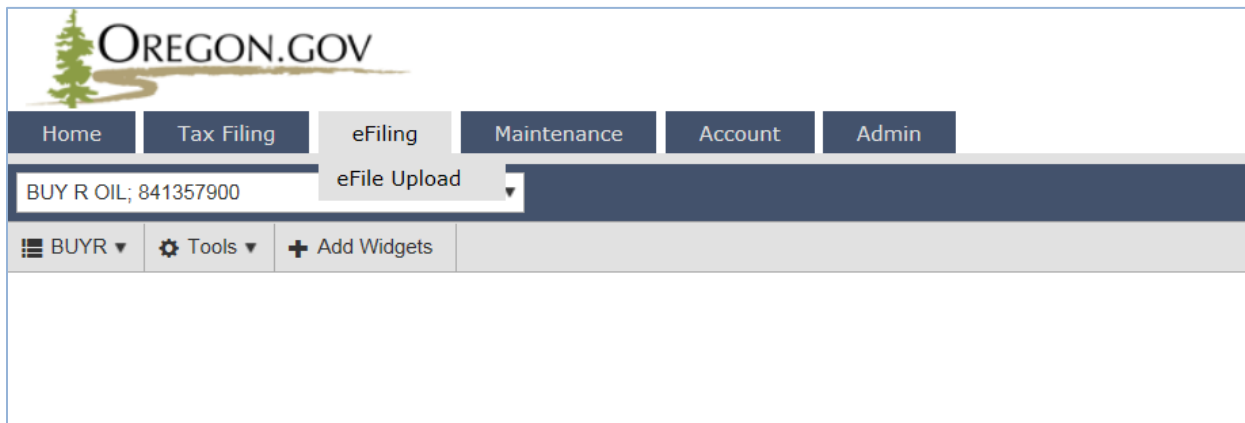


Figure 8. eFiling tab drop down menu

The “Maintenance” tab provides several levels of information in the Fuels Tax System.

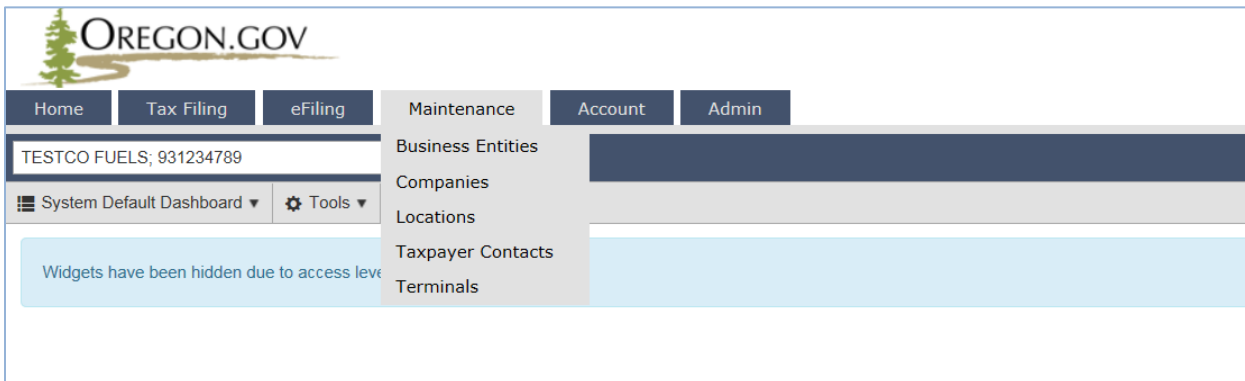


Figure 9. Maintenance tab drop down menu

There are five sub-menus from this tab:

**Business Entities** contains a list of companies that are registered with the Fuels Tax Group (Master Company ID 0). These companies could be your suppliers or customers. You may also add supplier, carriers, and customers to this list to make it easier to complete your tax reports. Companies you add may only be viewed by your company (your company ID will show rather than 0).

- Companies lists the accounts established for the company, and the applications that are available for other licenses. The “Details” tab has the company name. The “Information” tab is the data provided when licensed, and can be updated.
- Locations lists the locations that are registered with the Fuels Tax Group, and also fuel terminals. This information is used when completing tax reports.
- Taxpayer Contacts users assigned to your company are added to the contact list, but you can also “Add New Record” and customize your list with additional contacts.
- Terminals list of fuel terminals in the US. This list can be searched, filtered, sorted, or downloaded to excel.

The “Account” tab displays the status of the company registrations, and the option to apply for additional licenses when needed.

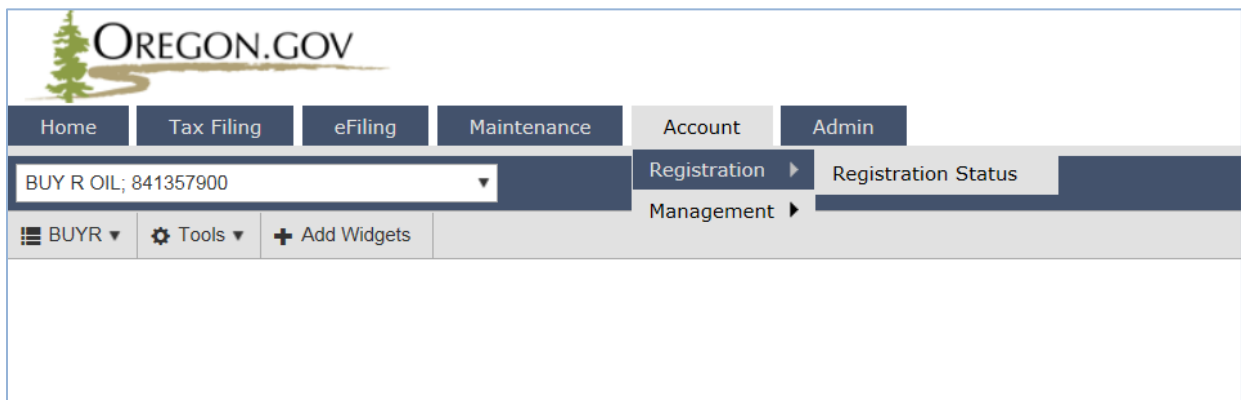


Figure 10. Account tab drop down menu

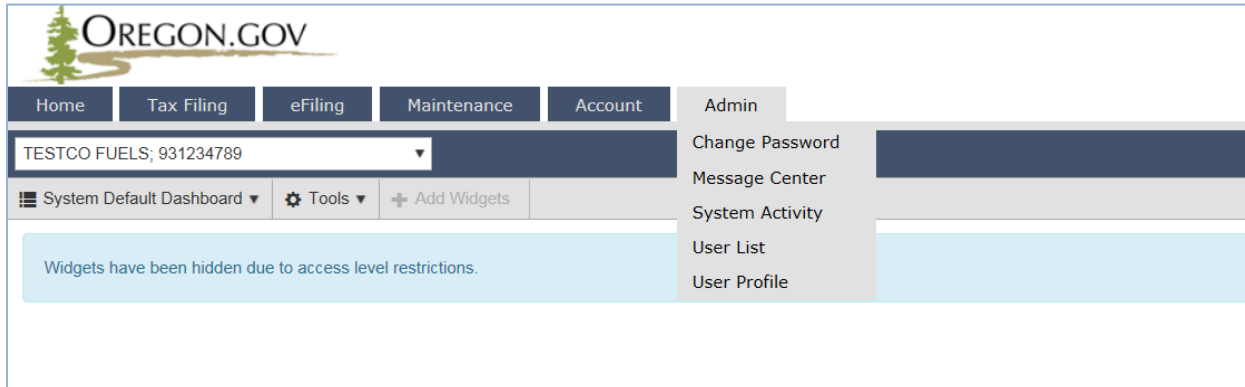
Select “Registration” and then “Registration Status” to apply for a new license, register your fuel tax bond, or submit a license cancellation request.

“Management” has five additional options:

- Company Balance a high level overview of any balance the company owes (or has overpaid) on the various accounts held by that company. Clicking on the balance line will open a menu to allow you to make a payment, view account activity, and view payment history.
- Account Activity the entries that make up the balance (tax due, credits, and payments)
- Payment History a listing of payments made, including date, tracking number, payment type, status, and amount.
- Payment Processing Setup allows you to set up automatic payments for fuels tax reports, or saves payment information to streamline the payment process
- Make Payment displays current amounts due, any past due amounts, and allows the user to designate the amount being paid.

Some roles may not have access to input data in all of these options. Check with your company administrator if you need access to additional screens.

The “Admin” tab is the last of the six menu options for company administrators.



**Figure 11. Admin tab drop down menu**

This tab contains five sub-menus to help manage your activity.

- |                 |  |
|-----------------|--|
| Change Password | The system will take you to this screen anytime you request a password change, whether it’s your first logon with a temporary password, or when you click “Change Password” from another screen.     |
| Message Center  | Displays messages sent to the administrator from the Fuels Tax System regarding the company account. This screen generally cannot be viewed by other roles.  |
| System Activity | shows system activity including status, date, process, description, and user name.   |
| User List       | a list of the users assigned to this company. The administrator can click on a user name to change their access role, update contact information, reset a password, or disable access to the system. |
| User Profile    | displays the profile of the current user. You can enter your password in the box and click “Unlock Profile” to update your own contact information, time zone, and security questions.               |

## VIEWING MULTI-COLUMN DATA, SORTING, GROUPING, FILTERS, AND EXPORTS

Many of the options for business entities, location information, terminals, and similar databases have thousands of listings. A filter function is available to limit the information displayed to just what is needed. The filtered information can then be exported to excel.

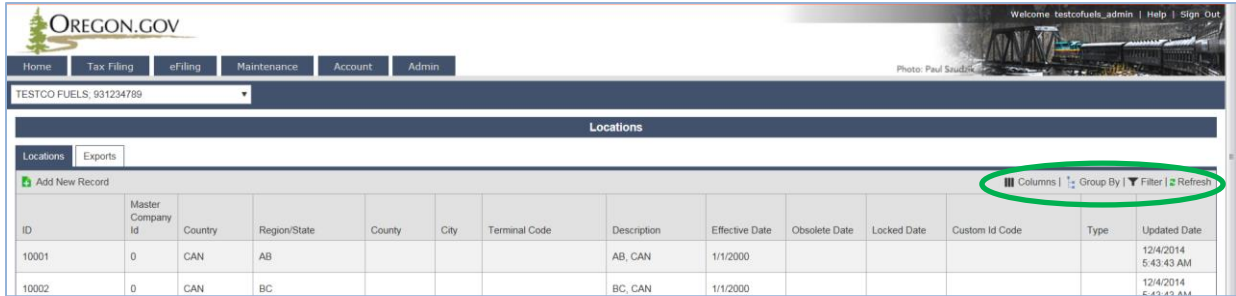


Figure 12. Location of filter tools

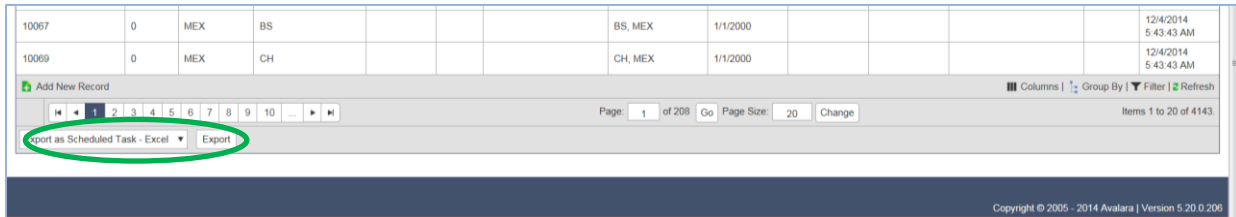


Figure 13. Location of Export to Excel tools

Data displayed can also be altered by which columns are being displayed. Select “Columns” to display the list of columns available in the database (list displayed in a pop up box). Check or uncheck the columns to get the desired columns in the display. This is often used to reduce the data viewed to fit the screen. Each database listing will have different line columns based on the data involved.

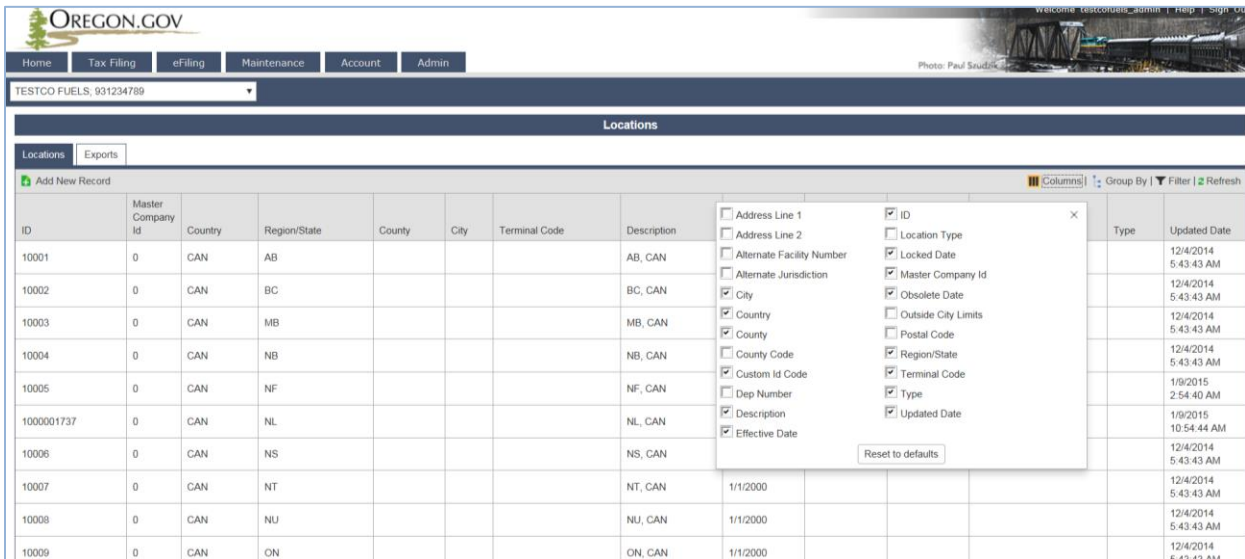
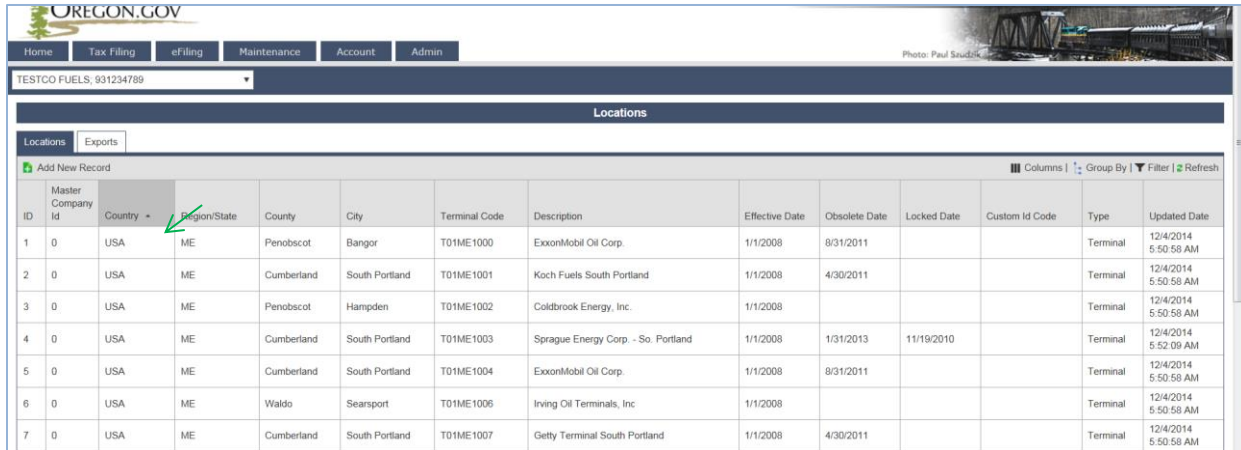


Figure 14. List of Columns

Sorting is another option for viewing the data in a particular way.

To sort by a particular column, click the header for that column. A little triangle will appear in the sorted column, and the shading will become darker. To sort A → Z, click once, and the triangle will point down. To sort Z → A, click twice and the triangle will point up. Clicking the triangle or title a third time will remove the sort.



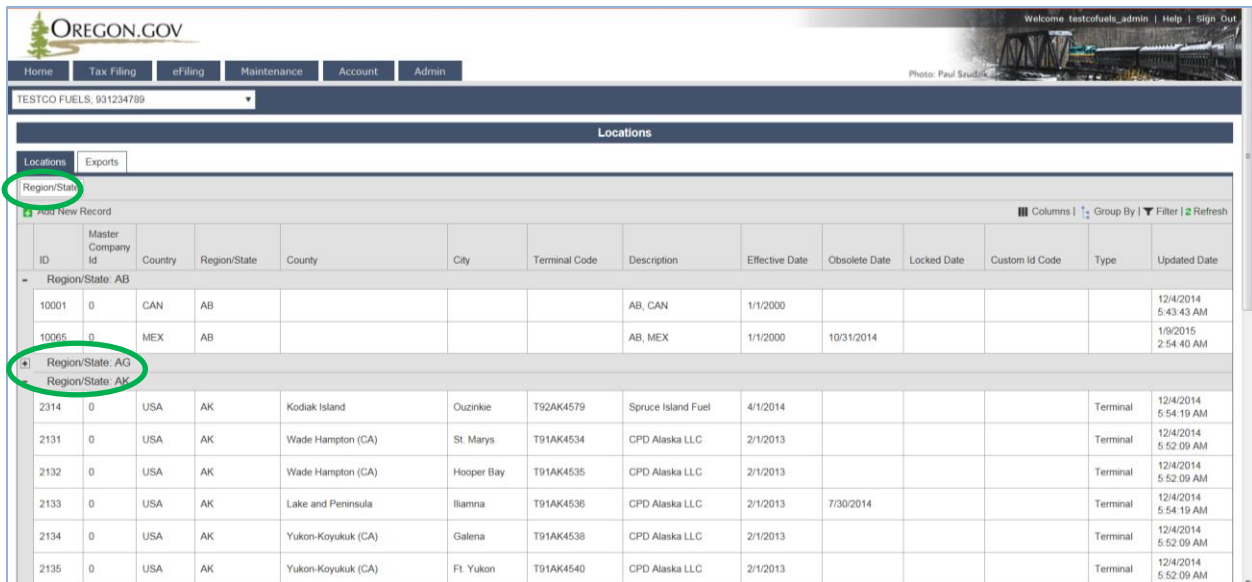


ID	Master Company Id	Country	Region/State	County	City	Terminal Code	Description	Effective Date	Obsolete Date	Locked Date	Custom Id Code	Type	Updated Date
1	0	USA	ME	Penobscot	Bangor	T01ME1000	ExxonMobil Oil Corp.	1/1/2008	8/31/2011			Terminal	12/4/2014 5:50:58 AM
2	0	USA	ME	Cumberland	South Portland	T01ME1001	Koch Fuels South Portland	1/1/2008	4/30/2011			Terminal	12/4/2014 5:50:58 AM
3	0	USA	ME	Penobscot	Hampden	T01ME1002	Coldbrook Energy, Inc.	1/1/2008				Terminal	12/4/2014 5:50:58 AM
4	0	USA	ME	Cumberland	South Portland	T01ME1003	Sprague Energy Corp. - So. Portland	1/1/2008	1/31/2013	11/19/2010		Terminal	12/4/2014 5:52:09 AM
5	0	USA	ME	Cumberland	South Portland	T01ME1004	ExxonMobil Oil Corp.	1/1/2008	8/31/2011			Terminal	12/4/2014 5:50:58 AM
6	0	USA	ME	Waldo	Searsport	T01ME1006	Irving Oil Terminals, Inc.	1/1/2008				Terminal	12/4/2014 5:50:58 AM
7	0	USA	ME	Cumberland	South Portland	T01ME1007	Getty Terminal South Portland	1/1/2008	4/30/2011			Terminal	12/4/2014 5:50:58 AM

Figure 15. Sample of Sorting

Another way to reduce the information to be reviewed is to group by a selected header. Click on “Group By” in the upper right hand corner, and drag the column header to the new row created below the “Locations” tab. The example below shows the data grouped by “Region/State”.

More than one column header can be selected to perform the grouping function. To hide a group, click on the minus sign icon to minimize that section. The selected group will then show a plus sign icon where the detail can be expanded.



ID	Master Company Id	Country	Region/State	County	City	Terminal Code	Description	Effective Date	Obsolete Date	Locked Date	Custom Id Code	Type	Updated Date
Region/State: AB													
10001	0	CAN	AB				AB, CAN	1/1/2000					12/4/2014 5:43:43 AM
10006	0	MEX	AB				AB, MEX	1/1/2000	10/31/2014				1/6/2015 2:54:40 AM
Region/State: AG													
Region/State: AK													
2314	0	USA	AK	Kodiak Island	Ouzinkie	T92AK4579	Spruce Island Fuel	4/1/2014				Terminal	12/4/2014 5:54:19 AM
2131	0	USA	AK	Wade Hampton (CA)	St. Marys	T91AK4534	CPD Alaska LLC	2/1/2013				Terminal	12/4/2014 5:52:09 AM
2132	0	USA	AK	Wade Hampton (CA)	Hooper Bay	T91AK4535	CPD Alaska LLC	2/1/2013				Terminal	12/4/2014 5:52:09 AM
2133	0	USA	AK	Lake and Peninsula	Iliamna	T91AK4536	CPD Alaska LLC	2/1/2013	7/30/2014			Terminal	12/4/2014 5:54:19 AM
2134	0	USA	AK	Yukon-Koyukuk (CA)	Galena	T91AK4538	CPD Alaska LLC	2/1/2013				Terminal	12/4/2014 5:52:09 AM
2135	0	USA	AK	Yukon-Koyukuk (CA)	Fl. Yukon	T91AK4540	CPD Alaska LLC	2/1/2013				Terminal	12/4/2014 5:52:09 AM

Figure 16. Sample of grouping

Click “Group By” again to remove all grouping selections.

Filtering is another option to narrow the results of a search. Click on the “Filter” icon and filter boxes and symbols will show in each column being displayed. For fields that have date entries, a calendar icon is also displayed.

The screenshot shows the 'Locations' table with the following columns: ID, Master Company Id, Country, Region/State, County, City, Terminal Code, Description, Effective Date, Locked Date, Custom Id Code, and Type. A 'Criteria box' is shown over the 'Region/State' column, and a 'Date criteria' box is shown over the 'Effective Date' column. The table contains 10 rows of data, all with 'CAN' as the Country and '1/1/2000' as the Effective Date.

Figure 17. Sample of Filtering

Multiple columns can be filtered at the same time.

Enter the criteria in the filter box and click on the icon next to it to display an options drop down box. This box contains selections that help filter the data accordingly. Select “Contains” or “Starts With” to help narrow the options.

The screenshot shows the 'Locations' table with the following columns: ID, Master Company Id, Country, Region/State, County, City, Terminal Code, Description, Effective Date, Locked Date, Custom Id Code, and Type. The table is filtered to show only locations with 'USA' as the Country and 'OR' as the Region/State. The table contains 17 rows of data, all with 'USA' as the Country and 'OR' as the Region/State.

Figure 18. Sample of a filtered list

Clear all filters by clicking on the filter icon again in the upper right corner.

This information can also be exported to excel. At the bottom of the window in the lower right corner, select “Export as Scheduled Task – Excel” or “Export as Scheduled Task – CSV” for the preferred format.

ID	Master Company Id	Country	Region/State	County	City	Terminal Code	Description	Effective Date	Locked Date	Custom Id Code	Type
1608	0	USA	OR	Coos	Coos Bay	T93OR4453	Tosco Corp. - Coos Bay	1/1/2008			Terminal
1609	0	USA	OR	Lane	Eugene	T93OR4454	SFP, LP	1/1/2008			Terminal
1568	0	USA	OR	Umatilla	Hermiston	T91OR4465	Union Pacific Railroad Co.	1/1/2008			Terminal
1606	0	USA	OR	Linn	Millersburg	T93OR4451	Sfpp, Lp	1/1/2008			Terminal
1824	0	USA	OR	Multnomah	Portland	R93OR0100	Alon USA - Portland	5/1/2011	1/15/2015		Refinery
1567	0	USA	OR	Multnomah	Portland	T91OR4450	Aircraft Service International, Inc	1/1/2008	1/14/2015		Terminal
1610	0	USA	OR	Multnomah	Portland	T93OR4455	BP West Coast Products LLC	1/1/2008	1/14/2015		Terminal
1611	0	USA	OR	Multnomah	Portland	T93OR4456	Chevron USA, Inc. - Portland	1/1/2008	1/13/2015		Terminal
1612	0	USA	OR	Multnomah	Portland	T93OR4457	Kinder Morgan Liquid Terminals, LLC	1/1/2008	1/14/2015		Terminal
1613	0	USA	OR	Multnomah	Portland	T93OR4458	McCall Oil and Chemical Corp.	1/1/2008	1/13/2015		Terminal
1614	0	USA	OR	Multnomah	Portland	T93OR4459	Shore Terminals LLC - Portland	1/1/2008	1/14/2015		Terminal
1615	0	USA	OR	Multnomah	Portland	T93OR4460	Kinder Morgan Tank Storage Terminal	1/1/2008			Terminal
1616	0	USA	OR	Multnomah	Portland	T93OR4461	Shell Oil Products US	1/1/2008	1/14/2015		Terminal
1617	0	USA	OR	Multnomah	Portland	T93OR4462	Shore Terminals Lc	1/1/2008			Terminal
1618	0	USA	OR	Multnomah	Portland	T93OR4463	Time Oil Co. - Portland	1/1/2008			Terminal
1619	0	USA	OR	Multnomah	Portland	T93OR4464	ConocoPhillips PL - Portland	1/1/2008	12/28/2012		Terminal
2147	0	USA	OR	Multnomah	Portland	T93OR4464	Phillips 66 PL - Portland	2/1/2013	1/13/2015		Terminal
2291	0	USA	OR	Multnomah	Portland	T93OR4465	Arc Terminals Holdings LLC	6/1/2014	1/14/2015		Terminal
1607	0	USA	OR	Umatilla	Umatilla	T93OR4452	Tidewater Terminal - Umatilla	1/1/2008	1/14/2015		Terminal

Figure 19. Export data selection tools

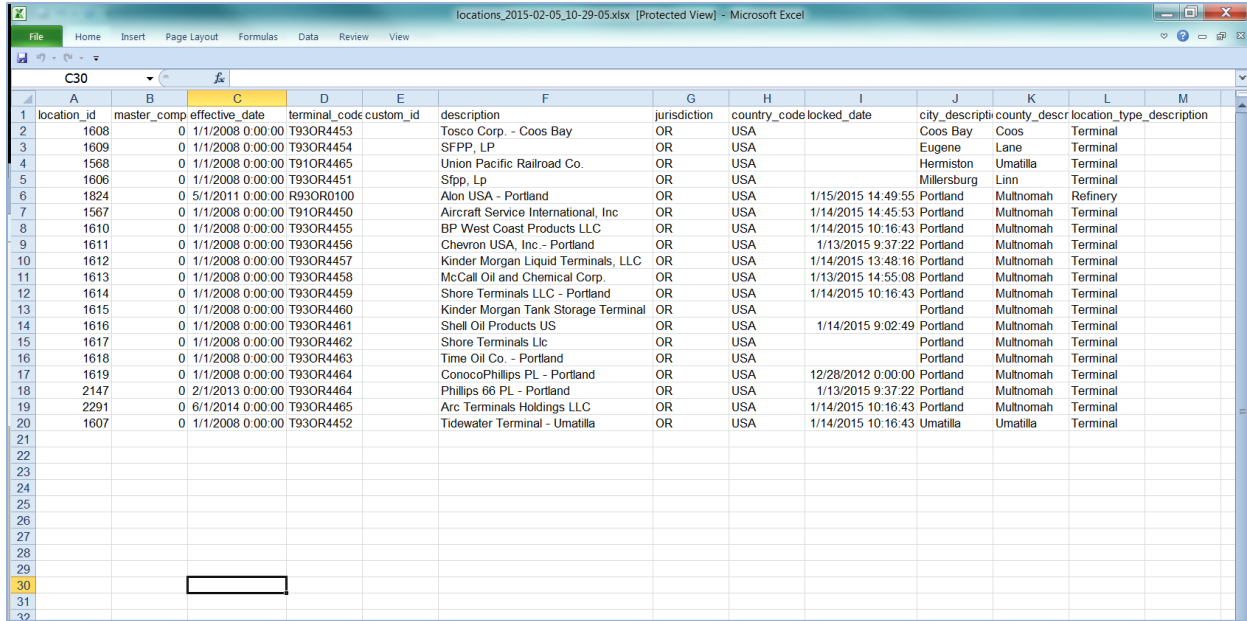
Click on the “Export” button and the screen will change to the “Exports” tab.

Status	Start Date	Completed Date	Description	User	Output File
✓ Passed	2/5/2015 10:29:03 AM	2/5/2015 10:29:05 AM	Locations grid export	testcofuels_admin	6.2 kb

Click here to open exported file

Figure 20. Sample of exported file

When the green check mark appears in the left box and the status is “Passed” the filtered data is ready to view in Excel. The exported information will only contain the columns selected in the view, and the records returned from the filter. Click on the output file to open the excel file.



location_id	master_comp	effective_date	terminal_code	custom_id	description	jurisdiction	country_code	locked_date	city_description	county_description	location_type_description
1608	0	1/1/2008 0:00:00	T93OR4453		Tosco Corp. - Coos Bay	OR	USA		Coos Bay	Coos	Terminal
1609	0	1/1/2008 0:00:00	T93OR4454		SFPP, LP	OR	USA		Eugene	Lane	Terminal
1568	0	1/1/2008 0:00:00	T91OR4465		Union Pacific Railroad Co.	OR	USA		Hermiston	Umatilla	Terminal
1606	0	1/1/2008 0:00:00	T93OR4451		Sfpp, Lp	OR	USA		Millersburg	Linn	Terminal
1824	0	5/1/2011 0:00:00	R93OR0100		Alon USA - Portland	OR	USA	1/15/2015 14:49:55	Portland	Multnomah	Refinery
1567	0	1/1/2008 0:00:00	T91OR4450		Aircraft Service International, Inc	OR	USA	1/14/2015 14:45:53	Portland	Multnomah	Terminal
1610	0	1/1/2008 0:00:00	T93OR4455		BP West Coast Products LLC	OR	USA	1/14/2015 10:16:43	Portland	Multnomah	Terminal
1611	0	1/1/2008 0:00:00	T93OR4456		Chevron USA, Inc. - Portland	OR	USA	1/13/2015 9:37:22	Portland	Multnomah	Terminal
1612	0	1/1/2008 0:00:00	T93OR4457		Kinder Morgan Liquid Terminals, LLC	OR	USA	1/14/2015 13:48:16	Portland	Multnomah	Terminal
1613	0	1/1/2008 0:00:00	T93OR4458		McCall Oil and Chemical Corp.	OR	USA	1/13/2015 14:55:08	Portland	Multnomah	Terminal
1614	0	1/1/2008 0:00:00	T93OR4459		Shore Terminals LLC - Portland	OR	USA	1/14/2015 10:16:43	Portland	Multnomah	Terminal
1615	0	1/1/2008 0:00:00	T93OR4460		Kinder Morgan Tank Storage Terminal	OR	USA		Portland	Multnomah	Terminal
1616	0	1/1/2008 0:00:00	T93OR4461		Shell Oil Products US	OR	USA	1/14/2015 9:02:49	Portland	Multnomah	Terminal
1617	0	1/1/2008 0:00:00	T93OR4462		Shore Terminals Llc	OR	USA		Portland	Multnomah	Terminal
1618	0	1/1/2008 0:00:00	T93OR4463		Time Oil Co. - Portland	OR	USA		Portland	Multnomah	Terminal
1619	0	1/1/2008 0:00:00	T93OR4464		ConocoPhillips PL - Portland	OR	USA	12/28/2012 0:00:00	Portland	Multnomah	Terminal
2147	0	2/1/2013 0:00:00	T93OR4464		Phillips 66 PL - Portland	OR	USA	1/13/2015 9:37:22	Portland	Multnomah	Terminal
2291	0	6/1/2014 0:00:00	T93OR4465		Arc Terminals Holdings LLC	OR	USA	1/14/2015 10:16:43	Portland	Multnomah	Terminal
1607	0	1/1/2008 0:00:00	T93OR4452		Tidewater Terminal - Umatilla	OR	USA	1/14/2015 10:16:43	Umatilla	Umatilla	Terminal

Figure 21. Exported file sample

Click on the “Locations” tab (just above the green check mark) to return to the filtered data, or any other tab on the menu for additional tasks.