Electronic Transfer System (ETS)

Client Accounts Manual

September 2007

1 ETS Account

1.1 ETS Account (Site Administrator Account)

In order to use the secure Electronic Transfer System (ETS) web site, an ETS application form must be submitted to the Department of Energy. Only those individuals who have a legitimate business reason for using ETS will be issued an account. An ETS Account Application form is at. http://www.energy.gov.ab.ca/OurBusiness/1076.asp This application form contains instructions on how it is to be completed and where to submit it. Once the application form and the letter of authority have been approved, the Department of Energy will assign an ETS Account Id and Password (called an Site Administrator). The contact representative identified on the application form will be the site administrator for this account and then will be contacted with this account information.

Only one ETS account will be approved for a legal entity. The approved company representative that has been issued the id and password will be known as the **Site Administrator** and is responsible for all activities (from the use of the Site Administrator and all client accounts) on the web site. Please read the Government of Alberta “Disclaimer and Copyright” and “Privacy Statement” which can be located here:
http://www.energy.gov.ab.ca/SiteInfo/copyright.asp and
http://www.energy.gov.ab.ca/SiteInfo/privacy.asp

1.2 Client Accounts

The Site Administrator for a company is responsible for creating Client Accounts and administrating the level of access to ETS based on the role an individual has within the company. **The Site Administrator Account should not be shared**.

Logging on to the secure ETS web site using the Site Administrator Account will provide the ability to create Client Accounts.

Individual accounts (called a Client Account) are subsets of the Site Administrator Account. Each Client Account created is given access to form types and assigned a role that defines the functionality that is required.

To create a new Client Account, a unique Client Account Name must be created forming the Client Account login id. The password associated with this Client Account login id must conform to the Department of Energy security policy. This new Client Account login id can then be used to logon to the secure ETS web site. When registered in ETS, this new Client Account must be assigned a role which defines the functionality that this account can access while on the web site. This is designed to allow organizations to delegate specific functionality to certain accounts for different forms in order to maximize the visibility of secure information to those authorized to view that information.

2 Secure ETS Web Site

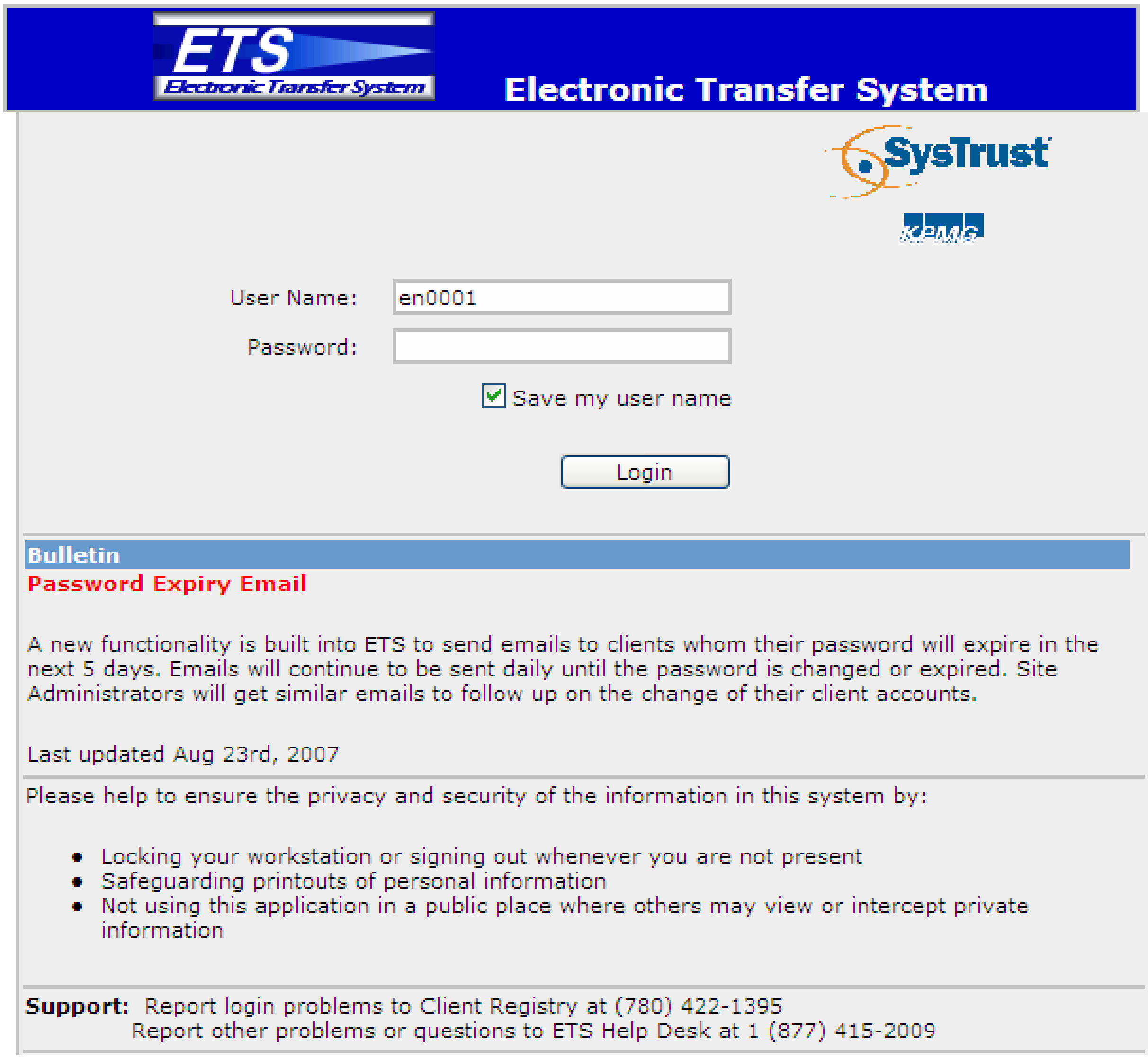
2.1 Main Web Site

The secure ETS web site can be accessed from the Department of Energy's main web site at http://www.energy.gov.ab.ca/index.asp or http://www.energy.gov.ab.ca/OurBusiness/1076.asp From the Department of Energy main web page, the ETS main web site can be accessed by clicking on the ETS linked image, on the lower left side of the web page. Clicking on this linked image will open the ETS main web site, where access to the secure ETS web site is available via a clickable link at the top of the page. On the Energy web site there are also links to all the ETS Manuals, Handbooks and Forms, which outline the secure ETS web site and its use.

The secure web site can be logged on to by clicking on the **Electronic Transfer System** link. Please read the requirements necessary to view this web site located in **"Technical Requirements"** section of this document.

Before using the ETS web site the system will prompt the user for a User Name and Password. This User Name and Password follows the current Department of Energy security policy and prevents unauthorized access to those individuals not registered with the Department of Energy.

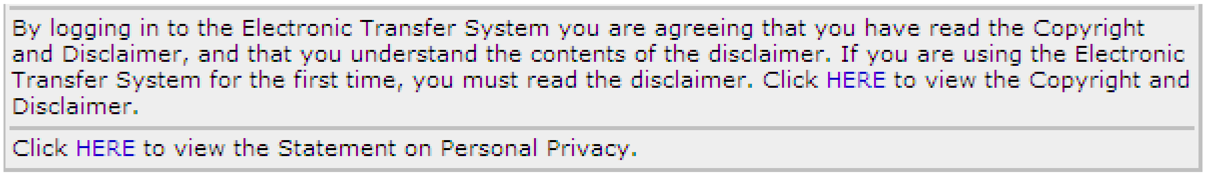
2.2 Logging On



To Log onto to the ETS web site:

1. Enter the Site Administrator Account Id (issued by the Department of Energy) or a Client Account Id (issued by the Site Administrator Account) into the **User Name**.
2. Enter the corresponding **Password**.
3. When complete, click the **Login** button.

By entering this site you are agreeing to the Government of Alberta Copyright and Disclaimer policy located at http://www.energy.gov.ab.ca/SiteInfo/copyright.asp and the Privacy policy located at http://www.energy.gov.ab.ca/SiteInfo/privacy.aspThere is a link at the bottom of the logon page as displayed below.


By logging in to the Electronic Transfer System you are agreeing that you have read the Copyright and Disclaimer, and that you understand the contents of the disclaimer. If you are using the Electronic Transfer System for the first time, you must read the disclaimer. Click HERE to view the Copyright and Disclaimer.

Click HERE to view the Statement on Personal Privacy.

2.2.1 Password Expiration

The ETS application, defined by the Department of Energy for security purposes, enforces a 90 day password expiry period. This means that you will be required to re-enter a new password every 90 days. This password policy is detailed as follows;

- Password cannot contain all or part of the User Name.
- Password cannot contain all or part of the Client Account Name.
- Password cannot contain all or part of the First Name or Last Name.
- Password must be a minimum of 8 characters in length.
- Password must contain three of the following four categories;
  - UPPER case letters A-Z.
  - lower case letters a-z.
  - Numbers 0-9.
  - Special Characters ;:[]\/()~|{}”<>!@#$%^&*_-+=.

Note: Passwords are case sensitive.

Note: ETS will send emails to clients whom their password will expire in the next 5 days. Emails will continue to be sent daily until the password is changed or has expired. Site Administrators will get similar emails to follow up on the change of their client accounts. After the expiry date has passed, a user can no longer login to the ETS system.

Note: If a Client Account password expires, the Site Administrator should be contacted to reset the password. If an Site Administrator Account expires, contact the Client Registry to reset the password at (780) 422-1395 or E-mail inquiries can be sent to:clientregistry.energy@gov.ab.ca between Monday thru Friday 8:15AM to 4:30 PM, except statutory holidays.

2.2.2 Login Failure

If login fails the web page will be displayed with the following an error;

If this error persists please do the following;

- Client Accounts should contact the Site Administrator for the organization.
- Site Administrator Account should contact the Help Desk at (780) 422-1395 between Monday thru Friday 8:15AM to 4:30 PM, except statutory holidays.

If the user types the wrong password 3 times consecutively, the user will have to close the web browser (i.e. Internet Explorer) then open the browser again.

2.2.3 Login Successful

If the login process has been accepted, the secure ETS web site will be displayed as described in the "Secure ETS Web Site" section of this document.

The operational hours of the ETS web site are;

- Monday thru Thursday 6:00 AM to 10:00 PM.
- Friday 6:00 AM to 4:30 PM.

Note: Although the ETS web site is available outside these hours, it is not guaranteed due to maintenance schedules.

The operational hours for land searches are;

Land Requests

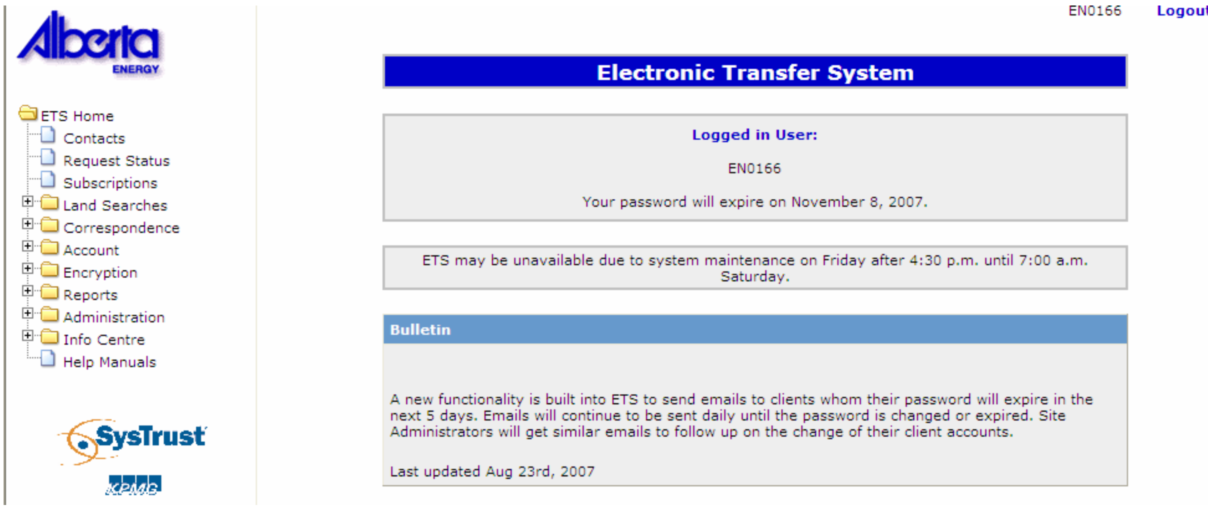
- Monday thru Thursday 6:00 AM to 10:00 PM.
- Friday 6:00 AM to 4:30 PM.

Note: Although the ETS web site is available outside these hours, it is not guaranteed due to maintenance schedules.

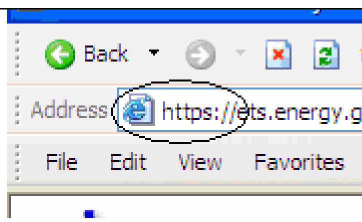
2.3 Logging Off

The current secure method for logging off of the ETS application is to click the Logout link on the top left corner of each web page. Clicking this link will reopen the login page forcing the re-entry of the User Name and Password for authentication.

2.4 Main Web Page



<u>Security Features:</u>

	The URL in the address, of the browser, must start with an https session signifying that this web page is using the secure HTTP protocol. This protocol encrypts information between the client's computer and the Department of Energy.
	The padlock icon will be displayed at the bottom of the browser window on the status bar. Double clicking this icon will display a certificate of authenticity assigned to the Department of Energy.

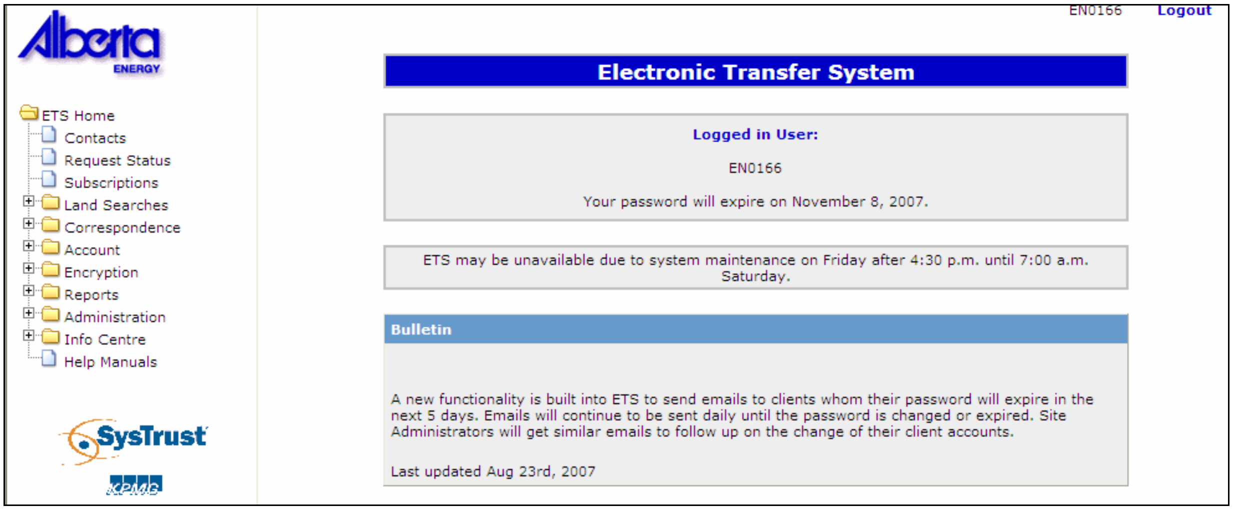
Note: If you do not see these security features then you are not logged into the secure ETS web site.

In the event that there are any technical issues with this web site or concerns with security please contact the Department of Energy via the **Feedback Technical** link at the bottom of each page, or by using the **Contacts** menu option.

If there are any concerns, or suggestions, about this web site please contact the Department of Energy via the **Feedback Content** link at the bottom of each page or by using the **Contacts** menu option.

2.5 Bulletin Area

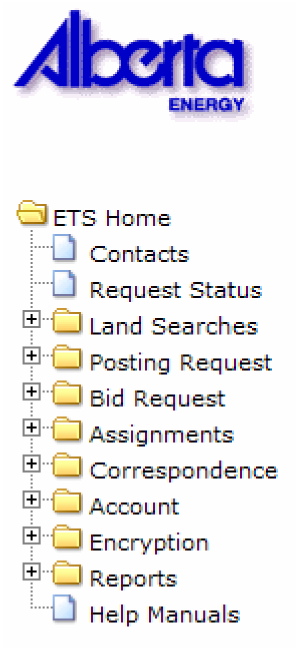
On the main ETS web page (after logging in or from the "ETS Home" menu option) there is a Bulletin Area that will display important information. If the ETS system has assigned down time, new features or any other information the Department of Energy needs to communicate, this Bulletin Area will display that information.



Note: This Bulletin Area should always be read when entering the site or experiencing any problems.

2.6 Site Menu

Once logged on to the ETS web site, the available functions in the menu will be based on what this login id is set up for. These functions are presented in the menu on the left side of the browser window. These functions are grouped by topic and each topic with more than one option will be indicated by the Expand icon allowing the opening of the folder and a Collapse icon for closing the folder.



At no time is the selection of a menu item available to any account that is not authorized to use that functionality.

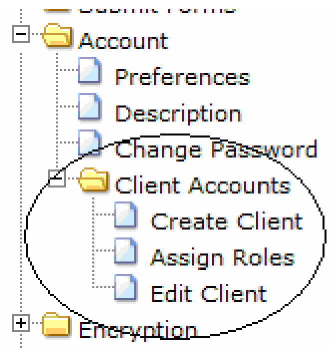
3 Creating Client Accounts

3.1 Accessing the Client Accounts Menu

The Client Account functionality appears as a sub folder of the **Accounts** folder on the menu:

The **Client Accounts** folder will be displayed only if the Site Administrator Account is logged in and is NOT accessible to any Client Accounts.

To access the **Create Client** option, click the **Expand** icon next to the **Account** folder. Then, click the **Expand** icon next to the **Client Accounts** folder to open this folder.

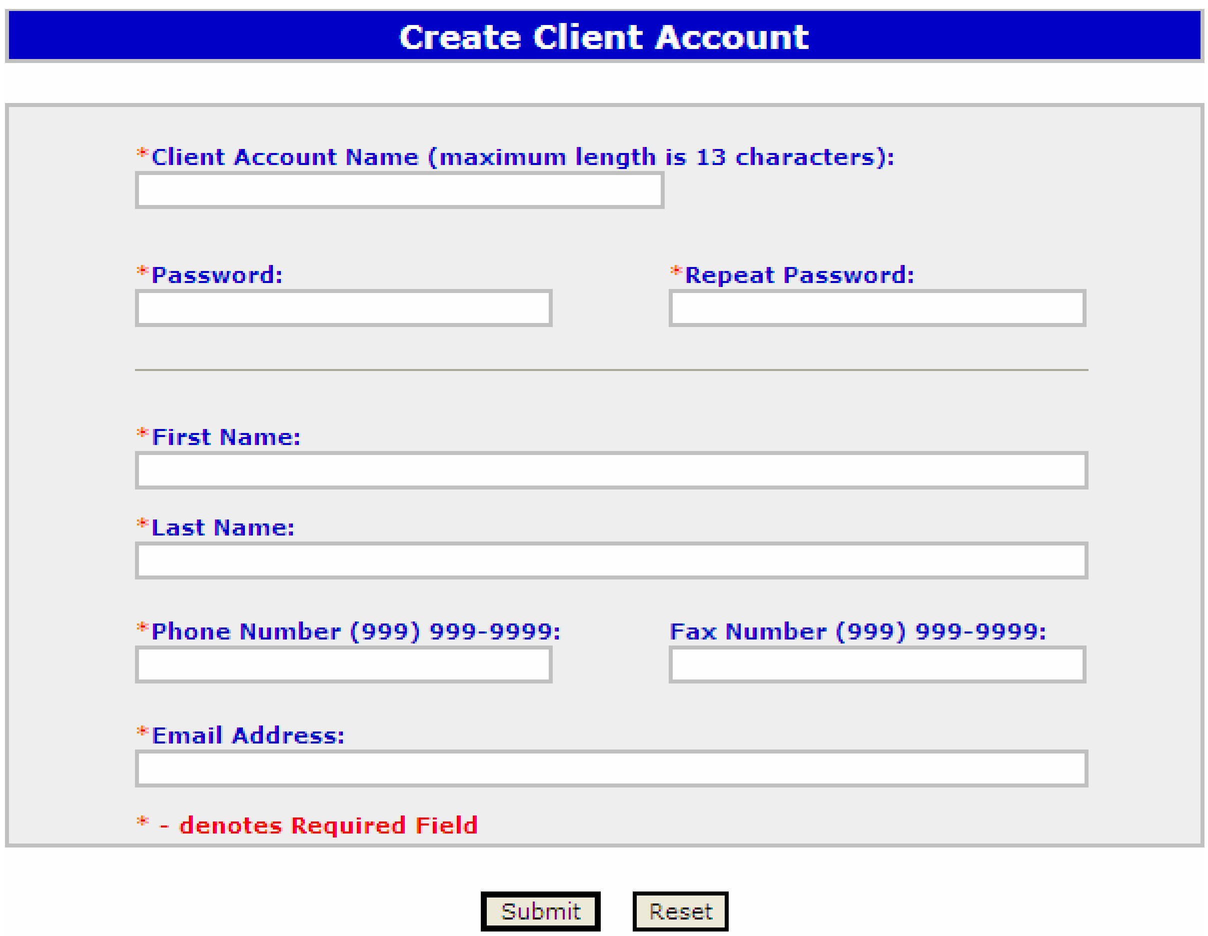


The **Client Accounts** folder gives the Site Administrator the ability to create and manage Client Accounts.

3.2 Create New Client Account

To create a Client Account, select **Create Client** from the **Client Accounts** sub folder under the **Accounts** folder. This will display the following “Create Client Account” web page.

Note: The **Client Accounts** folder will be displayed only at the Site Administrator level. This option will not be displayed on the tree view at the Client account level.



To create a Client Account, a unique Client Account Name must be entered into the **Client Account Name** text box (maximum of 13 characters). The name entered here will be concatenated with the Administrator Account Login Id to form the Client Account Login Id. Example: Site Administrator Account Login Id is EN0001, Client Account Name is Bob, so then the new Client Account Login Id is EN0001_BOB.

When choosing a Client Account Name, it is recommended, that selecting an easy to remember name, such as the company’s naming standards for users is recommended.

The **Password** field is a required field (maximum of 14 characters) for any Client Account and when entering a password please ensure that any password meets the following Department of Energy security policy defined as follows:

- Password cannot contain all or part of the User Name.
- Password cannot contain all or part of the Client Account Name.
- Password cannot contain all or part of the First Name or Last Name.
- Password must be a minimum of 8 characters in length.
- Password must contain three of the following four categories;
    - UPPER case letters A-Z.
    - lower case letters a-z.
    - Numbers 0-9.
    - Special Characters ;:[]\/()~|{}"<>!@#$%^&*_-+=.

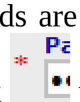
For security purposes the ETS application will force the password to change every 90 days as part of the Department of Energy security policy

Note: Passwords are case sensitive.

Fill in the rest of the fields as listed below;

- **First Name** - required field (maximum of 20 characters).
- **Last Name** - required field (maximum of 40 characters).
- **Phone Number** - required field (maximum of 14 characters). The **Phone Number** field must contain two separators defining the area code and the phone number. The area code may be inside parenthesis.
- **Fax Number** - optional field (maximum of 14 characters). The **Fax Number** field when filled in must contain two separators defining the area code and the fax number. The area code may be inside parenthesis.
- **Email Address** - required field (maximum of 60 characters). The **Email Address** field must contain the "@" and "." characters with an extension following the "." character and an extension preceding the "@" character.

The contact information can be edited at a later time using the **Edit Client** option, see the "Edit Client Accounts" section of this document.

If any of the required fields are not filled in **or** any of the fields do not have the correct information, then a red asterix  will be displayed beside the field. To correct this problem, fix the information in the fields **or** add the missing information to the required fields. If there are any errors they will be displayed at the top of the screen in red.

Clicking the **Reset** button will clear all the fields on the form.

Once all of the required information has been entered, click the **Submit** button and the information will be validated. If there are no errors a “Confirmation” screen is displayed.

This confirmation page displays the Client Account Name that will be created for this Client Account, along with the contact representative details that were entered.

Note: The Client Account Name has changed to include the Site Administrator Account id at the beginning. All Client Account Names will automatically begin with this Site Administrator Account Id. **This will be the login id for this new Client Account**.

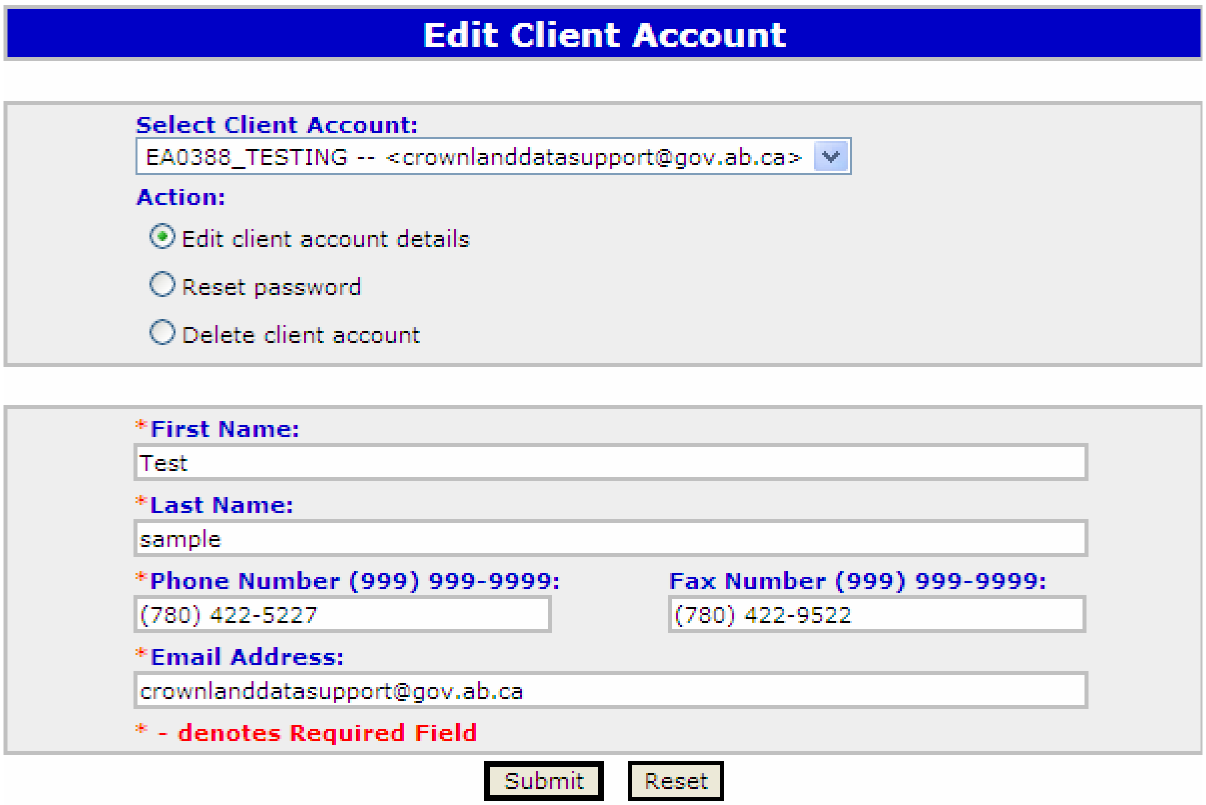
Before finalizing the creation of this new account, review the information to determine if it is correct.

- Acceptable information;
  - Click the **Create Account** button.
- Unacceptable Information;
  - Click the **Cancel** button to return back to the “Create Client Account” screen.

After creating a Client Account, roles must be assigned to it, please see the “Assign Roles” section of this document.

4 Edit Client Accounts

This feature allows the Site Administrator to edit the information for a Client Account that may have changed.



To Edit the Client Account information follow these steps:

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Expand** icon next to the **Client Accounts** folder.
3. Click the **Edit Client** option.
4. Click the **Edit Client Account Details** option on the “Edit Client Account” screen.
5. Edit the information for the client as required.
6. Click the **Submit** button to save the changes.
7. Click the **Reset** button to cancel the changes.

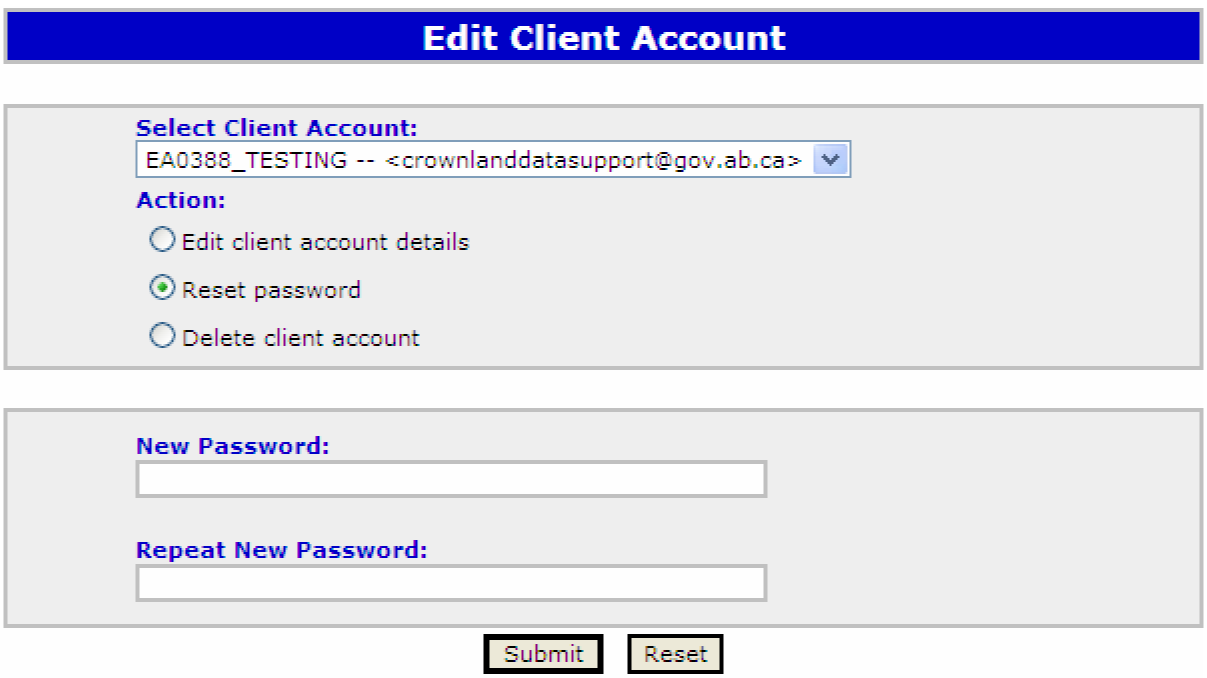
4.1 Reset Password

The Site Administrator can log in to ETS and reset a Client Account password for any reason. As part of the DOE security policy the system will enforce this every 90 days.

The **New Password** and **Repeat New Password** fields are required fields (maximum of 14 characters) for any Client Account and when entering a password, please ensure that any password meets the following DOE security policy defined as follows:

- Password cannot contain all or part of the Client Account Name.
- Password cannot contain all or part of the First Name or Last Name.
- Password must be a minimum of 8 characters in length.
- Password must contain three of the following four categories;
    - UPPER case letters A-Z.
    - lower case letters a-z.
    - Numbers 0-9, !@#$%^&*_-+=.
    - Special Characters ;:[]\/()~|{}"<>.

Note: Passwords are case sensitive.



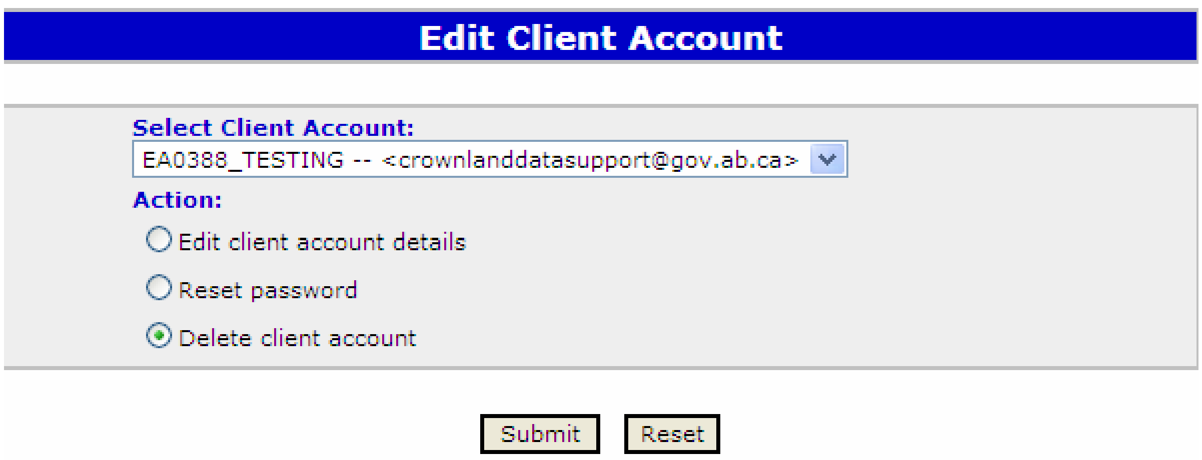
To reset the password of a Client Account:

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Expand** icon next to the **Client Accounts** folder.
3. Click the **Edit Client** option.
4. Click the **Reset Password** option on the "Edit Client Account" screen.

5. Enter the new password in **New Password** for the client account, based on DOE security policy as noted above.
6. Repeat the password in **Repeat New Password** to ensure correctness.
7. Click the **Submit** button to save the changes.
8. Click the **Reset** button to cancel the changes.

4.2 Removing a Client Account

Removing a Client Account is designed to help the Site Administrators eliminate the possible security risk associated with employees leaving the company. This feature allows Site Administrators to block the access to sensitive account information. The details of the Client Account and the requests that the Client Account performed will still exist but the login capabilities will no longer be allowed.



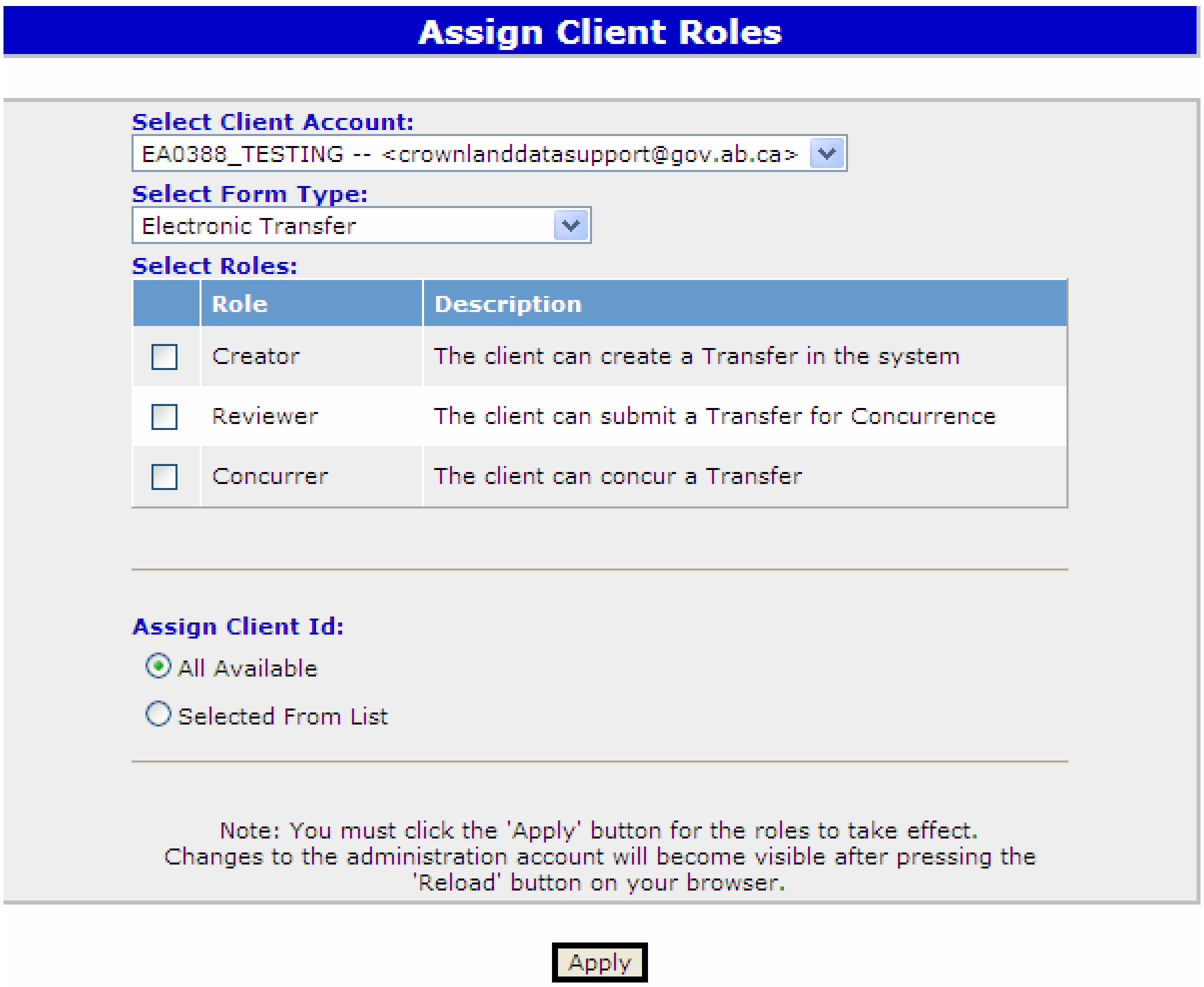
To Remove a Client Account follow these steps:

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Expand** icon next to the **Client Accounts** folder.
3. Click the **Edit Client** option.
4. Click the **Delete Client Account** option from the “Edit Client Account” screen.
5. Click the **Submit** button to save the changes.
6. Click the **Reset** button to cancel the changes.

Note: When the **Submit** button is clicked a “Confirmation” screen will be displayed giving the opportunity to back out of this option.

5 Assign Roles

In order for a Client Account to access functionality on the web site, the Site Administrator must first assign a role to the Client Account. The Site Administrator can perform this step as soon as the Client Account has been created.



The "Assign Client Roles" web page will display with a dropdown list of the available Client Accounts that have been created by the Site Administrator Account, as well as a dropdown list containing the form types that have been set up for the Site Administrator Account.

Beneath the dropdown lists are the roles that can be assigned to the selected Client Account based on the selected form type if the company has more than one registered account.

Most form types have only one role associated with them, however, other form types can have multiple roles associated with them. For detailed information please see the help manuals for a particular form type. Manuals can be found by selecting the **Help Manuals** option on the menu or on the ETS main web site at http://www.energy.gov.ab.ca/OurBusiness/1076.asp or in the "Role Description" section of this document. There are a few form types that cannot be assigned roles at all, for these form types only the Site Administrator Account can access the output.

To assign a role to a Client Account:

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Expand** icon next to the **Client Accounts** folder.
3. Click the **Assign Roles** option.
4. Select the account from the **Select Client Account** dropdown list box.
5. Select the form type from the **Select Form Type** dropdown list box.
6. Place a **check mark** in the checkbox beside the name of the role(s) to be assigned.
7. Click the **Apply** button to save the changes.
8. Repeat steps for each additional form.

Note: The **Apply** button must be clicked before selecting a new Client Account or Form Type in order for changes to take effect. Repeat these steps for each Form Type and role to assign.

5.1 Role Descriptions

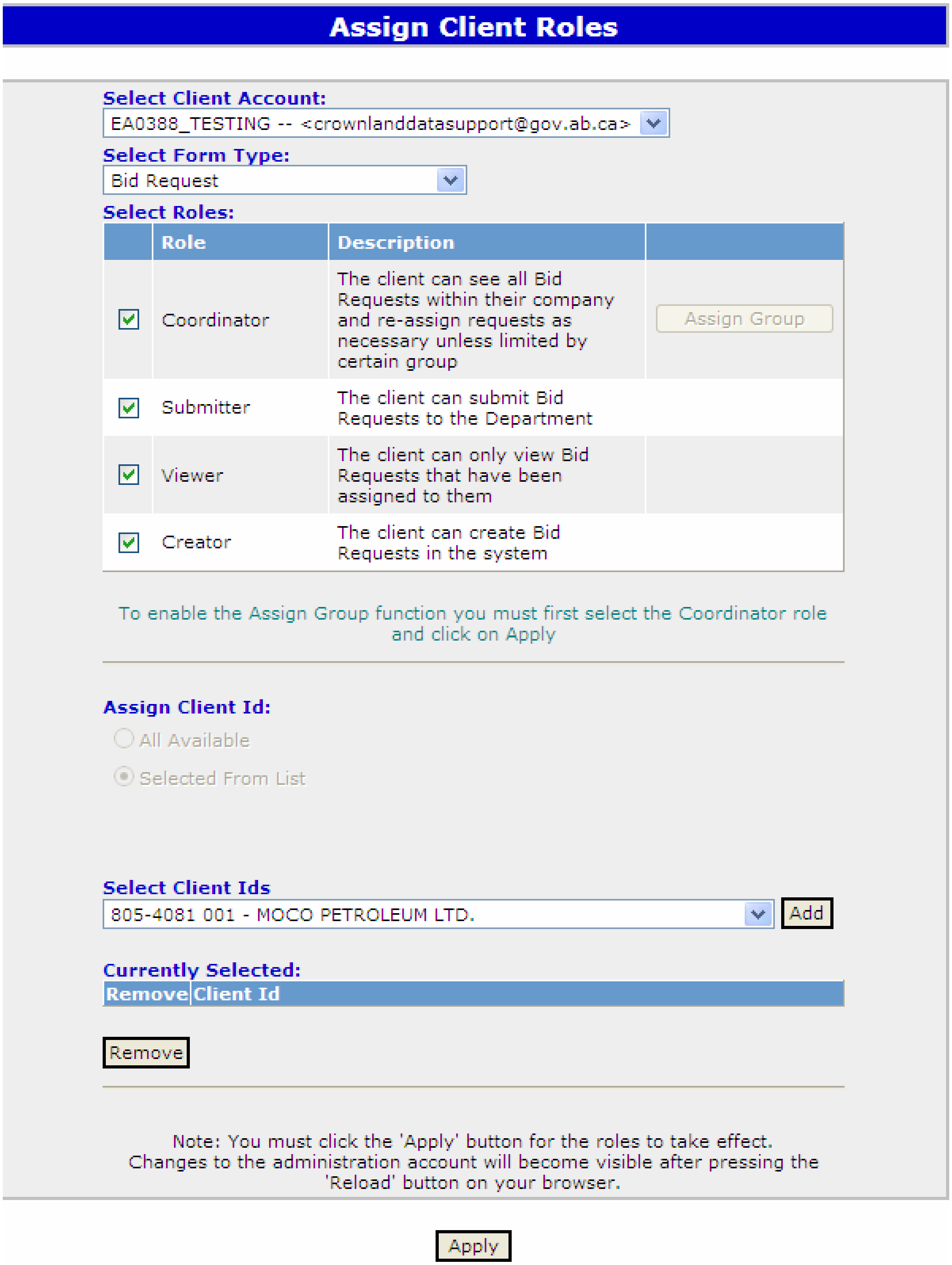
The various roles used within the ETS web site are based on the Form Types that were associated to the Site Administrator Account as defined by the initial application filed with the DOE. The side menu functions and options are dependant on these Form Types. These options can be modified by submitting a new ETS application form located here http://www.energy.gov.ab.ca/OurBusiness/1076.asp and changing the required options. Follow "ETS Account (Site Administrator Account)" section of this document to perform this activity.

The security model used within the ETS web site is enforced by the roles that are assigned to a Client Account. This allows the Site Administrator to handle the delegation of duties to authorized personnel within the organization. These roles are based on a security model that handles the segregation of data to only those authorized to view that data based on the role. Information or requests submitted to the DOE, by that Client Account role, can only be retrieved by that Client Account role.

Each of the Form Types that could be associated to the Site Administrator Account is listed below. The various roles for each form are also described that the Site Administrator can assign to a Client Account.

Client IDs must be assigned to the selected client account when adding roles for certain Form Types such as the "Electronic Assignment", "Bid Request", "Electronic Transfer" or

"Posting Request". They represent the Registry ID that will be used when submitting requests. By default, the Client Account will have access to the **All Available** option, which means that the Client Account will have access to all Client Ids that have been associated with the Site Administrator Account. By selecting the **Selected From List** option, individual client ids can be added to the Client Account.



Assign Client Roles

Select Client Account:

EA0388_TESTING -- <crownlanddatasupport@gov.ab.ca>

Select Form Type:

Bid Request

Select Roles:

	Role	Description	
☑	Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group	Assign Group
☑	Submitter	The client can submit Bid Requests to the Department	
☑	Viewer	The client can only view Bid Requests that have been assigned to them	
☑	Creator	The client can create Bid Requests in the system	

To enable the Assign Group function you must first select the Coordinator role and click on Apply

Assign Client Id:

○ All Available

◉ Selected From List

Select Client Ids

805-4081 001 - MOCO PETROLEUM LTD. Add

Currently Selected:

Remove	Client Id

Remove

Note: You must click the 'Apply' button for the roles to take effect.
Changes to the administration account will become visible after pressing the 'Reload' button on your browser.

Apply

To assign a specific Client Id to a Client Account:

1. Select the Client Account from the **Select Client Account** dropdown list box.
2. Select a form type from the **Select Form Type** dropdown list box.
3. From the Assign Client id, choose either the **All Available** or **Selected From List** option, depending on the operational needs.
4. If the **Selected From List** option is chosen, select the **Client ID** and **Address Number** from the dropdown list boxes. **Coming soon**, the Client name will also be displayed.
5. Click the **Add** button to add the Client ID and Address Number to the list. A list of the currently assigned Client Ids will appear in the list below. As many Client Ids as necessary can be added.
6. Click the **Apply** button to save changes.

To add a Client id to an existing account contact.

Alberta Department Of Energy / Client Registry. Phone: (780) 422-1395
E-mail inquiries can be sent to: clientregistry.energy@gov.ab.ca

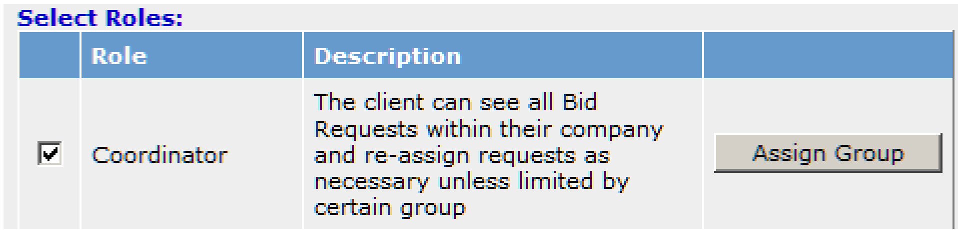
To remove a specific Client Id from a Client Account:

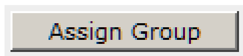
1. Select the Client Account from the **Select Client Account** dropdown list box.
2. Select a form type from the **Select Form Type** dropdown list box.
3. Place a **check mark** in the checkbox next to the client id(s) to be removed from the Currently Selected list.
4. Click the **Remove** button to delete selected items from the list.
5. Click the **Apply** button to save changes.

Coordinator Role:

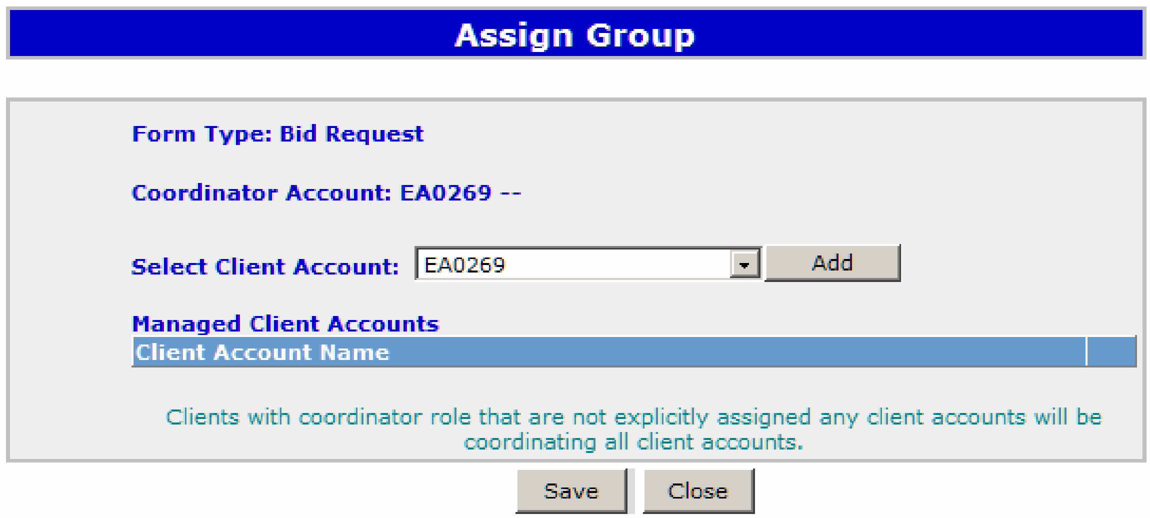
The coordinator role is designed to allow the management of requests by allowing certain Client Accounts to access the Requests on the Request Status screen.

Certain Form Types i.e. Bid Request allow the Site Administrator to assign the coordinator role to a specified set of Client Accounts within the company. When the coordinator role is checked the "Assign Group" button will become available.



By clicking the 

button an “Assign Group” pop up screen will be displayed allowing for the assignment of Client Accounts to be managed by the Coordinator Account.



To Assign Client Accounts to a Coordinator Group:

1. Choose a Client Account from the **Select Client Account** dropdown list.
2. Click the **Add** button to updated the Managed Client Accounts List/
3. When done entering the Client Accounts to manage by the Coordinator, Click the **Save** button to associate with Account.
4. If you do not want to continue click the **Close** button to exit the popup screen.

6 Preferences

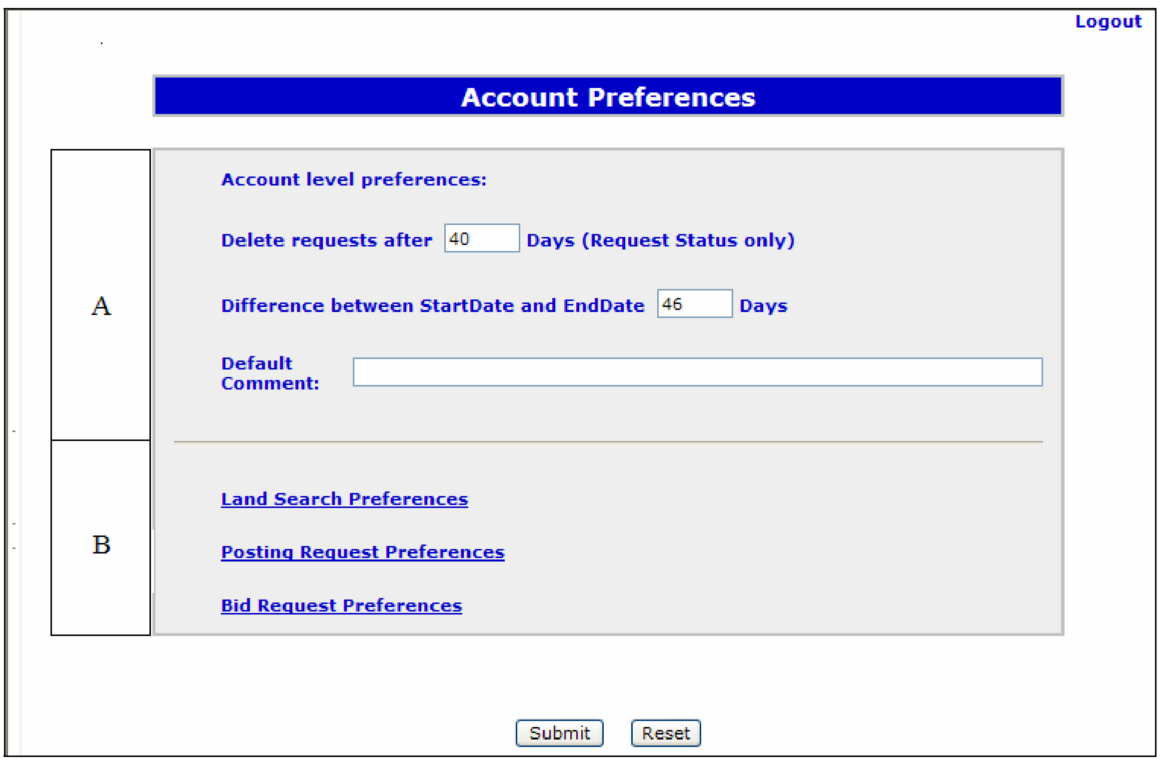
The Account folder on the side menu enables the user to set up certain system defaults.

6.1 Account Preferences

The account preferences allow each account to set up defaults that will be used by the system for that account.

Section A displays options that affect the ETS application as a whole.

Section B displays options for specific form types that are associated with this account. Please see the various form manuals for detailed information. The manuals can be found by clicking the **Help Manuals** option of the side menu.



To Change the settings follow these steps;

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Preferences** option.
3. The Account Preferences Screen will display.
4. Enter the number of days, into the **Delete Requests After** box, This will be the number of days after which a request is automatically deleted from the system, from the ("Request Status") screen. This setting has a maximum of 60 days, defaults to 30 days.
5. Enter a number of days, prior to today's date to be used in the **Difference Between Start Date and End Date** box. This will be used as the default date range (Start Date/End Date) for the list on the "Request Status" and "Work in Progress" screens. This setting has a maximum of 60 days, defaults to 5 days.
6. Enter a comment to be displayed by default on all of the ETS requests. Maximum of 60 characters.
7. Click the **Submit** button to save changes.
8. Click the **Reset** button to cancel the changes.

The following preferences are for each of the functionalities that may be associated with the account. Please see the various form manuals for these functions. The manuals can be found by clicking the **Help manuals** option of the side menu.

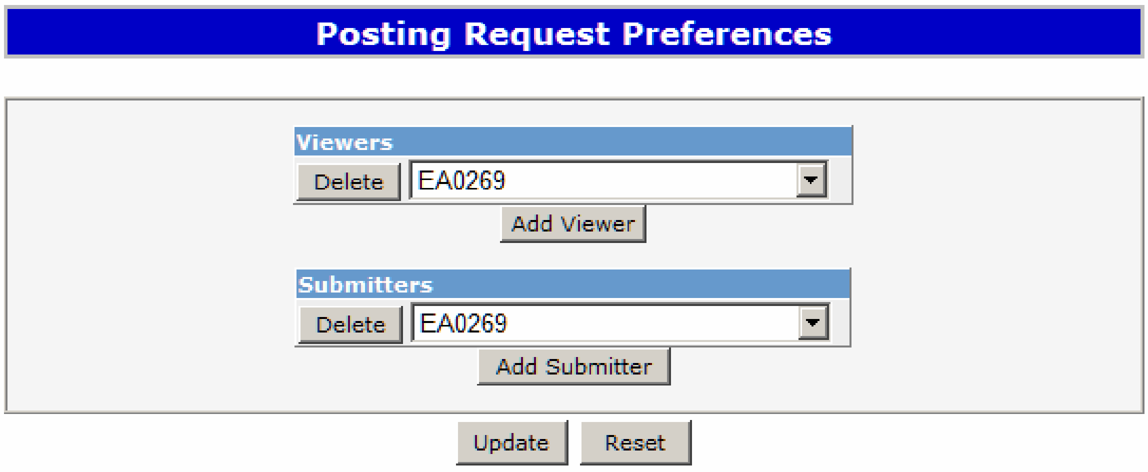
6.2 Posting Preferences

The Posting Request Preferences option is selectable if the account has access to Posting Request functionality. Adding a viewer to preferences list will make that viewer show up on roles tab of new created Posting requests.

For any new posting requests there may be certain accounts that need to have access to view or submit the request. These accounts are added as default viewers (able to view the request) or submitters (submit a request) of a posting request.

For a brief description of these two roles see the "Role Description" section of this document or the "Posting Manual".

On how these roles are used please see the "Posting Manuals" in the **Help Manuals** link on the ETS web site.



To change the Posting Request Preferences:

1. Start from the Account Preferences Screen.
2. Click the **Posting Request Preferences** option.
3. Click the **Add Viewer** button to add another user.
4. Click the **Add Submitter** button to add a user. Adding a Submitter to preferences list will make that Submitter show up on roles tab of new created Posting requests.
5. Click the **Delete** button to remove viewers or submitters from the list.
6. Click the **Update** button to save changes.
7. Click the **Reset** button to cancel the changes.

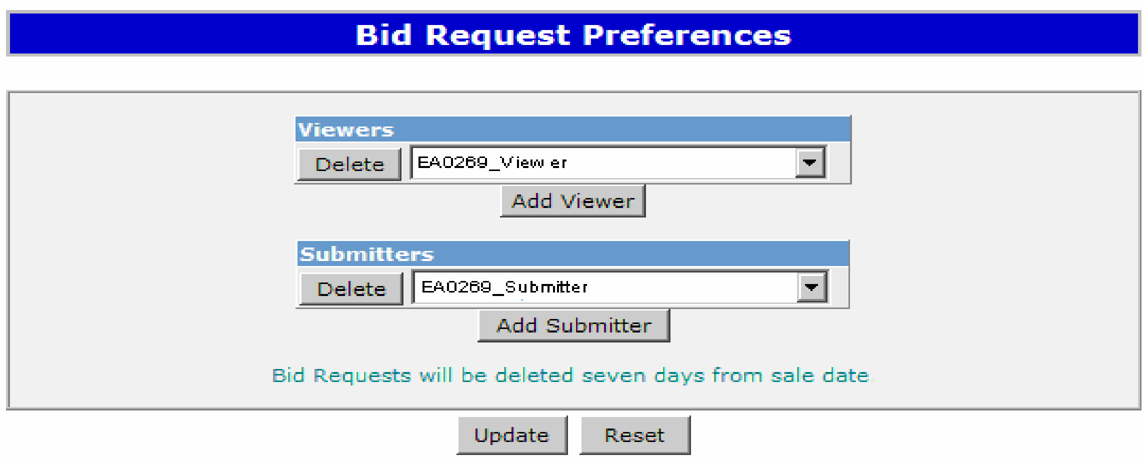
6.3 Bidding Preferences

The Bid Request Preferences option is selectable if the account has access to Bid Request functionality. Adding a viewer to preferences list will make that viewer show up on roles tab of new created Bid Requests.

For any new bidding requests there may be certain accounts that need to have access to view or submit the request. These accounts are added as default viewers (able to view the request) or submitters (submit a request) of a bidding request.

For a brief description of these two roles see the "Role Description" section of this document or the "Bidding Manual".

On how these roles are used please see the "Bidding Manuals" in the **Help Manuals** link on the ETS web site.



To change the Bid Request Preferences:

1. Start from the Account Preferences Screen.
2. Click the **Bid Request Preferences** option.
3. Click the **Add Viewer** button to add another user.
4. Click the **Add Submitter** button to add a user. Adding a Submitter to preferences list will make that Submitter show up on roles tab of new created Bid Requests.
5. Click the **Delete** button to remove viewers or submitters.
6. Click the **Update** button to save changes.
7. Click the **Reset** button to cancel the changes.

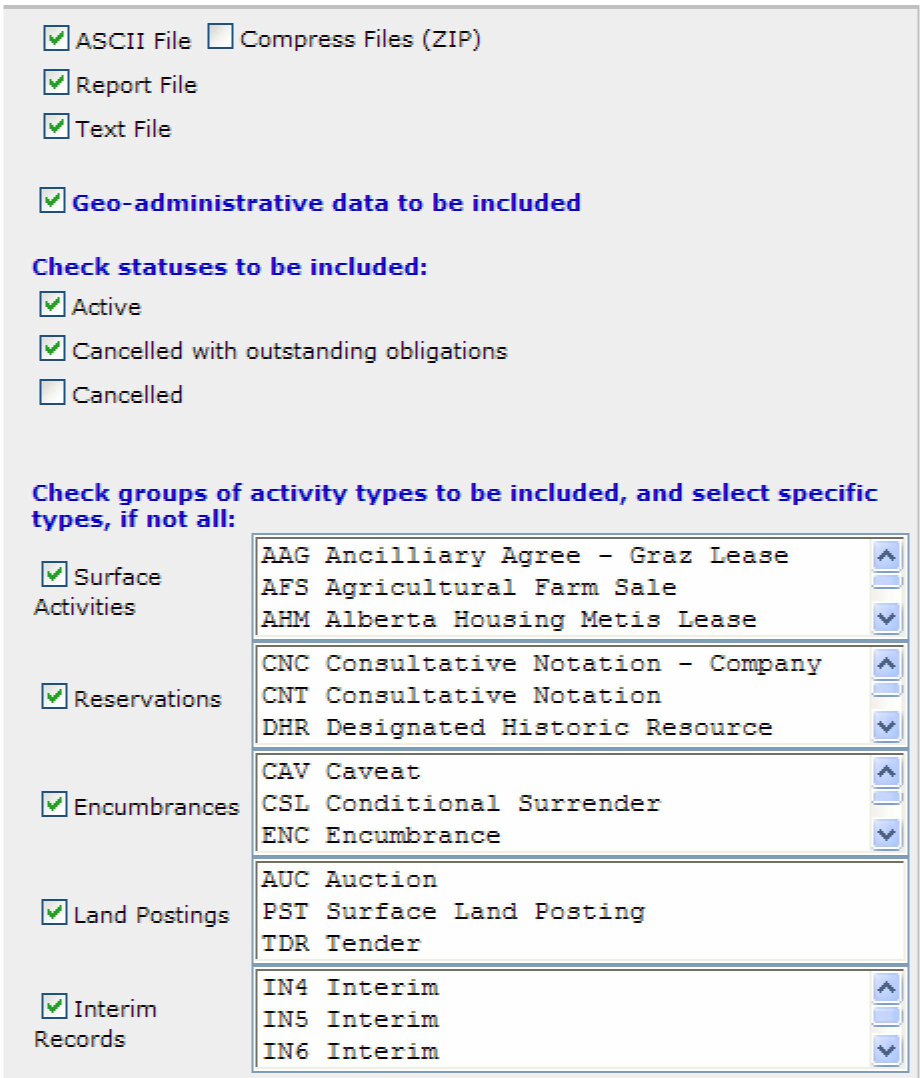
At this time there are no Preferences for Assignment Request.

6.4 Land Search Preferences

The Land Search Preferences option is selectable if the account has access to Land Search functionality.

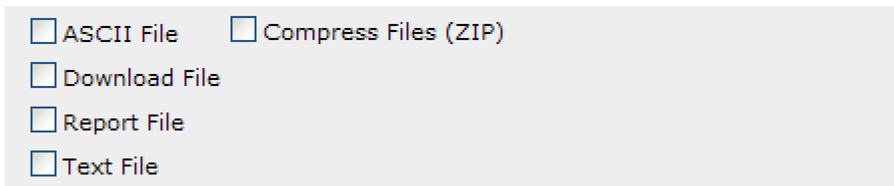
The land search preferences screen is made up of various preferences from the reports that are available to the Site Administrator Account. Each section of the preferences is detailed below.

Report: Surface Public Land Standing & Surface Activity Standing


ASCII File
Compress Files (ZIP)
Report File
Text File
Geo-administrative data to be included
Check statuses to be included:
Active
Cancelled with outstanding obligations
Cancelled
Check groups of activity types to be included, and select specific types, if not all:
Surface Activities
AAG Ancilliary Agree - Graz Lease
AFS Agricultural Farm Sale
AHM Alberta Housing Metis Lease
Reservations
CNC Consultative Notation - Company
CNT Consultative Notation
DHR Designated Historic Resource
Encumbrances
CAV Caveat
CSL Conditional Surrender
ENC Encumbrance
Land Postings
AUC Auction
PST Surface Land Posting
TDR Tender
Interim Records
IN4 Interim
IN5 Interim
IN6 Interim

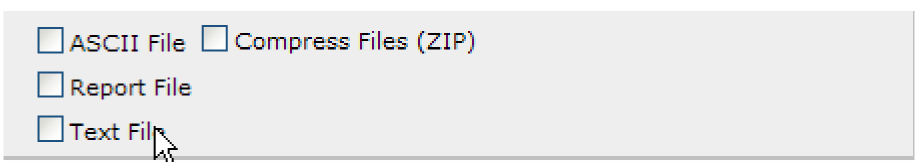
These preferences allow for the defaulting of details for the report “Surface Public Land Standing”. The first section defines how the report is to be delivered, in what format and if it is compressed for faster transmission. The next section asks if geo-physical data should be included in the report. Section three defines what status types the land search will include. The last section allows the report to be narrowed by the group that has activity on the land to be searched.

Report: Surface Activity Detail:



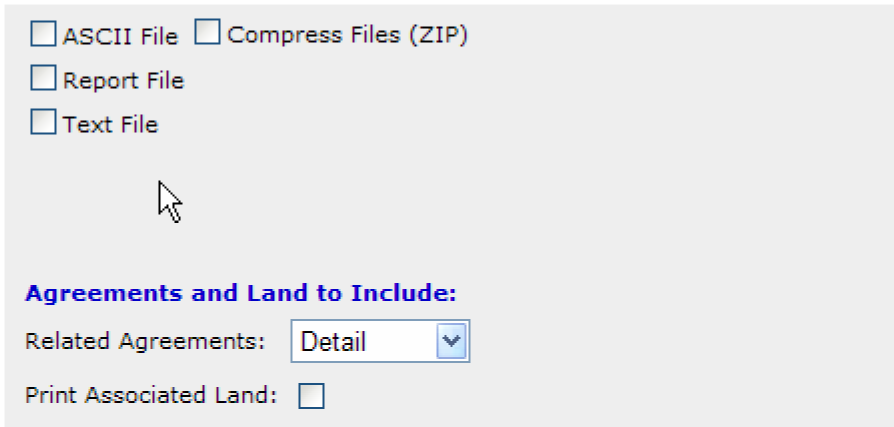
These preferences allow for the defaulting of details for the report “Surface Activity Detail”. This section defines how the report is to be delivered, in what format and if it is compressed for faster transmission.

Report: Mineral Agreement, Block Project, **Field, Restrictions, Land Tenure Client Information Unit Agreement, Unit By Client Id, Well Spacing Unit,** all use the same preferences and must be updated for each report individually.



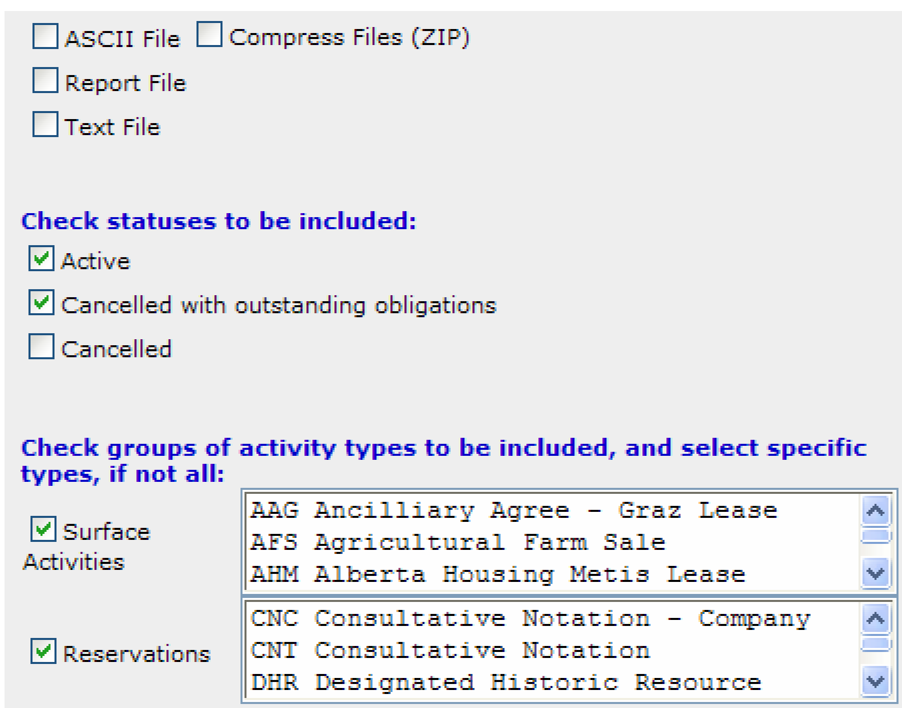
These preferences allow for the defaulting of details for the report. This section defines how the report is to be delivered, in what format and if it is compressed for faster transmission.

Report: DRRZD/ZD



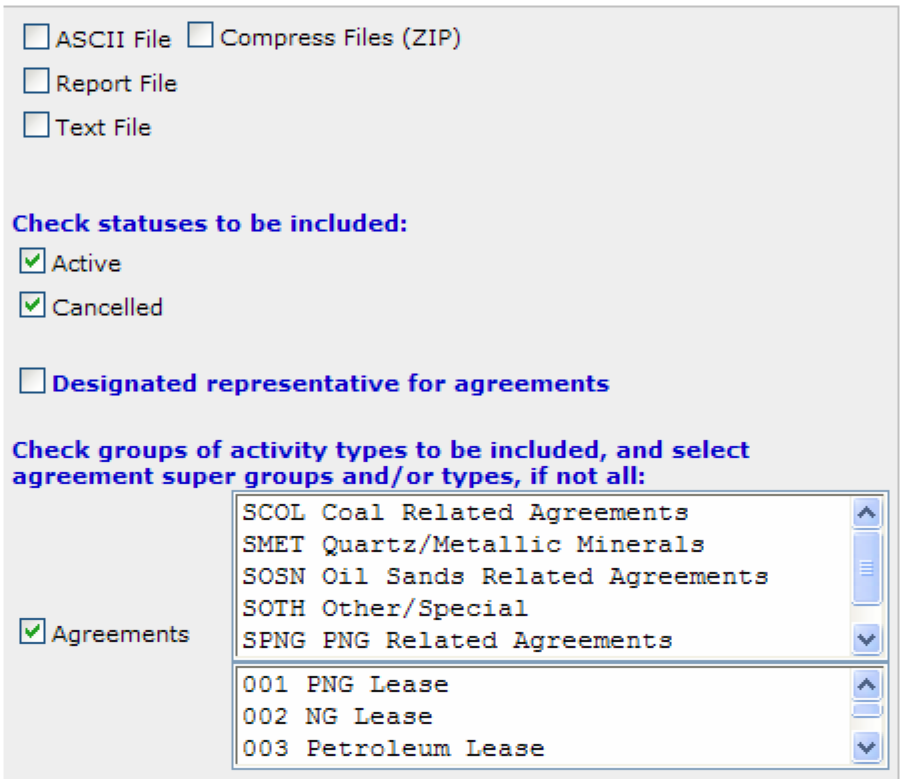
These preferences allow for the defaulting of details for the report "DRRZD/ZD". The first section defines how the report is to be delivered, in what format and if it is compressed for faster transmission. The last section defines what agreements and any associated lands to include in the report.

Report: Surface Documentation Summary & Surface Activity By Client ID both use the same preferences and must be updated for each report individually.



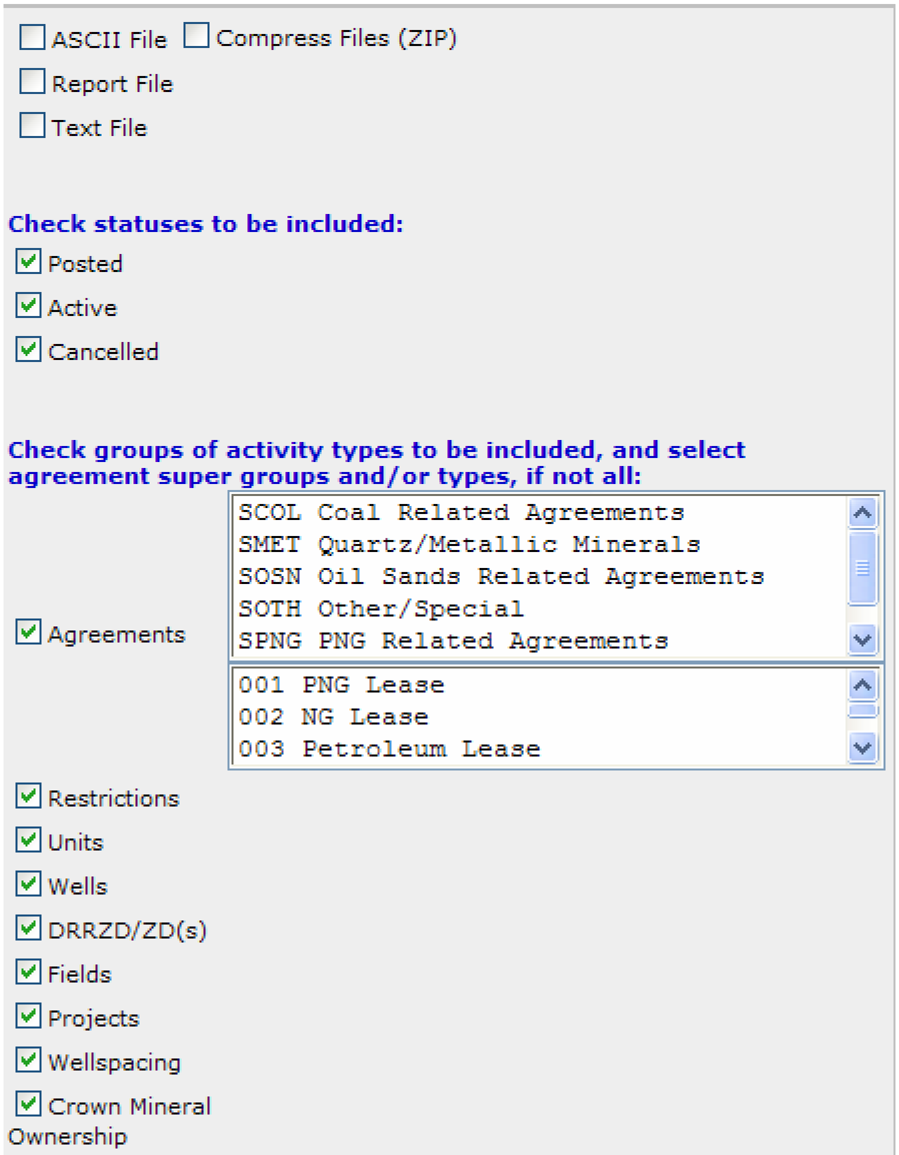
These preferences allow for the defaulting of details for the report. The first section defines how the report is to be delivered, in what format and if it is compressed for faster transmission. Section two defines what status types the land search will include. The last section allows the report to be narrowed by the group that has activity on the land to be searched.

Report: Mineral Agreement By Client Id:



These preferences allow for the defaulting of details for the report "Mineral Agreement By Client Id". The first section defines how the report is to be delivered, in what format and if it is compressed for faster transmission. Section two defines what status types the land search will include and whether to include the designated representative of the land. The last section allows the report to be narrowed by the group that has activity on the land to be searched.

Report: Mineral Land Index & Mineral Land Index By Client Id both use the same preferences and must be updated for each report individually.



These preferences allow for the defaulting of details for the report. The first section defines how the report is to be delivered, in what format and if it is compressed for faster transmission. Section two defines what status types the land search will include. The last section allows the report to be narrowed by the group that has activity on the land to be searched.

For all Report Preferences:

When complete with the changing of preferences in any section the following actions can be performed.

- **Update** – click to save the preferences for this account.
- **Reset –** click to reload the page with the original saved preferences.
- **Cancel –** click to return back to the “Account Preferences” screen.

6.5 Description

The Description option from the Accounts Menu allows for the details of the account to be displayed. It shows the role assignments for the account and the listing of available contacts for the account.

Account Information

Role Assignments

Client Account Name	Form Type	Role
EA0267	Posting Request	Coordinator
EA0267	Posting Request	Submitter
EA0267	Posting Request	Viewer
EA0267	Posting Request	Creator
EA0267	LSAS Products	Requester
EA0267	Oil Sands Royalty Correspondence	Submitter
EA0267	Bid Request	Coordinator
EA0267	Bid Request	Submitter
EA0267	Bid Request	Viewer
EA0267	Bid Request	Creator
EA0267	Agreement Documents	Viewer
EA0267	Electronic Assignment	Creator
EA0267	Electronic Assignment	Reviewer
EA0267	Electronic Assignment	Concurrer
EA0267	Land Title Searches	Requester
EA0267_ACTIVE	Bid Request	Submitter
EA0267_ACTIVE	Bid Request	Creator
EA0267_ACTIVE	Bid Request	Viewer

Listing of available contacts and forms they are allowed to submit.

Form Type	Contact	Phone Number	Email Address

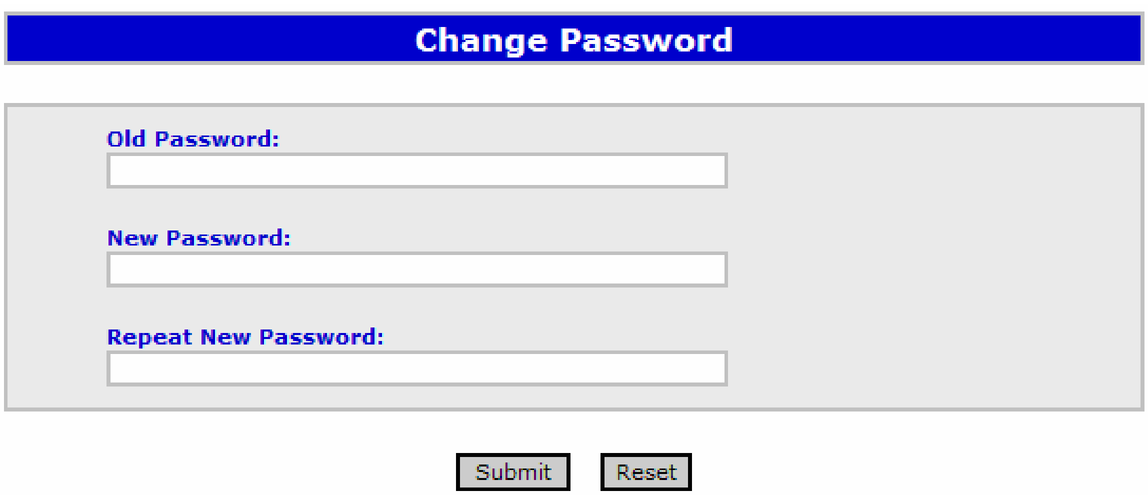
6.6 Change Account Password

For security purposes the ETS application will force the password to change every 90 days as part of the Department of Energy security policy.

The **Old Password**, **New Password** and **Repeat New Password** fields are required fields (maximum of 14 characters). Please ensure that any password meets the following DOE security policy defined as follows:

- Password cannot contain all or part of the User Name.
- Password cannot contain all or part of the Client Account Name.
- Password cannot contain all or part of the First Name or Last Name.
- Password must be a minimum of 8 characters in length.
- Password must contain three of the following four categories;
  - UPPER case letters A-Z.
  - lower case letters a-z.
  - Numbers 0-9.
  - Special Characters ;:[]\/()~|{}"<>!@#$%^&*_-+=.

Note: Passwords are case sensitive.



To change the Site Administrator Account Password:

1. Click on the **Expand** icon next to the **Account** folder.
2. Click the **Change Password** option.
3. Enter the **Old Password**.
4. Enter the **New Password**. Must follow DOE security policy, see note above.
5. Re-enter the **New Password**, to confirm.

6. Click the **Submit** button to save changes.
7. Click the **Reset** button to cancel changes.

To change a Client Account password see the “Reset Password” sub section of “Edit Client Accounts” section.

7 Reports

The reports section allows for the generation of static reports built into the ETS Application. All reports derive from a single point that requires some criteria for building the report. This criteria screen is displayed below and is called the Request Summary.

The Request Summary screen allows for criteria to be entered for the generation of the report. The following fields are explained below;

Field Name	Decscription
From Request	Enter the starting range request number generated by the system when the request was created.
To Request	Enter the ending range request number generated by the system when the request was created.
From Date	Enter a starting date for a range of requests
To Date	Enter an ending date for a range of requests
Comment	Enter the comment to search for. Comments entered when creating a request will be searched

When done entering the criteria either;

1. Click the **Submit** button to generate the report
2. Click the **Reset** button to clear the fields and start again.

Once the Submit button is clicked the report once generated will be available in the “Request Status” screen accessible from the menu.

8 Where to Go From Here

This concludes the procedures for creating Client Accounts and assigning roles.

The ETS application has been documented in various separate section manuals. Each of these manuals can be found on the main ETS web site located here: http://www.energy.gov.ab.ca/tenure/1076.asp (Handbooks Section) or the secure ETS web site (once logged in) by clicking the **Help Manuals** option on the menu to the left of any of the web pages. Here all the manuals for the various sections of the ETS web site can be found.

9 Contacts

- For information or help with the different Form Types please see the **Contacts** option on the ETS menu.

- For further information, please contact:

ALBERTA DEPARTMENT OF ENERGY / CLIENT REGISTRY

Phone: (780) 422-1395

E-mail inquiries can be sent to:

clientregistry.energy@gov.ab.ca

10 Technical Requirements

Ensure you have Access to the Internet and a Computer that Meets the Minimum Technical Requirements

The ETS web site is a secure environment protected by 128 bit encryption via SSL, identified by a certificate of authentication issued to the Department of Energy.

To use the secure ETS web site properly, stakeholders must ensure they (or their service provider) have access to a computer with Internet access. Stakeholders who do not have their own computer can use any computer with Internet access. Some locations that provide computers with free Internet access are the local library as well as various kiosks set up within the Department of Energy offices. The 3rd floor of the AMEC building in Calgary and the 7th floor North Petroleum Plaza in Edmonton also provide free Internet access.

The following minimum technical configuration must be used to access ETS:

<u>SOFTWARE</u>

- Netscape Navigator/Microsoft Internet explorer – Version supported by the software vendor.
    - Currently Netscape Version 4.7 and higher
    - Currently Internet Explorer 6.0 and higher
- Web browser **must** support Secure Sockets Layer (SSL) 3.0 with Cipher strength of 128 bits.
- Windows 2000 SP4 and higher
- The compression technique used is GNU ZIP (*.gz) which can be uncompressed by most software packages like WinZip or PKZIP.
- Adobe Reader version 6.0 or later.
- JavaScript on the browser **must** be enabled.
- Minimum screen resolution of 800 x 600.
- System allows browser cookies.

<u>HARDWARE</u>

- Computer/Processor 133 MHz or higher Pentium-compatible CPU.
- Memory at least 64 megabytes (MB) of RAM; more memory generally improves responsiveness.
- VGA display or higher resolution monitor.
- Keyboard/Mouse Required.

NETWORKING

- Internet Access
    - Connection speed of 28.8 kbps or greater.
        - **High Speed** connection (like ADSL) is recommended for many of the advanced options within ETS.