Electronic Transfer System (ETS)

Client Accounts Quick Guide

September 2007

1 ETS Account

1.1 ETS Account (Site Administrator)

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/tenure/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 Logging On

To Log onto to the ETS web site:

1. Enter the Site Administrator Id, issued by the DOE (EN000) or a Client Account Id, issued by the Site Administrator (EN000_accountname) into the **User Name** field.
2. Enter the **Password**.
3. Click the **Login** button.

3 Creating Client Accounts

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:

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 **Create Client** option.
4. Enter a unique **Client Account Name** (maximum of 13 characters).
5. Enter a **Password** (maximum of 14 characters).
6. Enter a **First Name** (maximum of 20 characters).
7. Enter a **Last Name** (maximum of 40 characters).
8. Enter a **Phone Number** (maximum of 14 characters).
9. Enter a **Fax Number, optional** (maximum of 14 characters).
10. Enter an **Email Address** (maximum of 60 characters).
11. Click the **Submit** button.
12. A **Confirmation** screen is displayed if all the information is valid.
13. Click from one of the following options;
    a. Acceptable information;
        - Click the **Create Account** button.
    b. Unacceptable Information;
        - Click the **Cancel** button to return back to the “Create Client Account” screen.

4 Change Account 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 change the Site Administrator or Client 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.

5 Reset Client Account Password

Please ensure that any password meets the following DOE security policy defined as follows:

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- 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.

6 Edit Client Account

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.

7 Remove a Client Account

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. From the drop down list choose the account to be deleted.
4. Click the **Edit Client** option.
5. Click the **Delete Client Account** option from the "Edit Client Account" screen.
6. Click the **Submit** button to save the changes.
7. Click the **Reset** button to cancel the changes.

8 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 various roles used within the ETS web site are based on the Form Types that were associated to the Site Administrator 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.

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.

If you need to assign a Client id to the Client Account, you can skip to step 3 of the "Assign a specific Client Id to a Client Account" from this point.

To Assign a specific Client Id to a Client Account:

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

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 box. The Client name is also 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:

Client Ids can be removed from any account.

1. Select the Client Account from the **Select Client Account** dropdown list box.
2. Select the 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.

To Assign Client Accounts to a Coordinator Group:

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.

1. Click the “Assign Group” button

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

9 Account Preferences

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

These options affect the ETS application as a whole.

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.

To Change the Posting Request 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.

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.

To Change the Bid Request 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.

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.

To Change the Land Search Preferences:

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

1. Start from the Account Preferences Screen.
2. Click the **Land Search Preferences** option.
3. Adjust any of the preferences to any of the sections listed.
4. Click the **Update** button to save changes.
5. Click the **Reset** button to reload the original preferences from the last save.
6. Click the **Cancel** button to return to the “Account Preferences” screen without saving the changes.

For a more detailed description of the Land Search Preferences, see the Client Accounts Manual found by clicking the **Help Manuals** option of the side menu.

10 Contacts

- For information or help with the different Form Types, please see the **Contacts** option in 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