



Bid Request Manual

Information Services
December 21, 2007
Version - 2

DISCLAIMER

1. In this disclaimer provision:
 - (a) "Department" means Her Majesty the Queen in right of the Province of Alberta;
 - (b) "Minister" means the Minister responsible for the Department of Energy;
 - (c) "Their employees" means and includes each, any and every officer, employee, servant and agent of either or both of the Department and the Minister and without limiting the generality of the foregoing, and includes employees of the Department and the Minister employed in Department of Energy.
 - (d) "ETS" means the Electronic Transfer System and all programs, hardware, documentation, functions and services forming a part thereof or associate therewith.
2. The Department, the Minister and their employees and the contractors and technical advisors of the aforesaid:
 - (a) make no warranty or representations, whether express or implied, to any person with respect to this material or documentation of ETS or as to the service, performance, quality, merchantability or fitness of any part of the aforesaid for any purpose; and
 - (b) shall not be liable for any actions, damages or claims, whether occasioned by negligence or otherwise, that any person, user, subscriber or any employees of the aforesaid may hereafter have, allege or become entitled to (including but not limited to any claim for third-party contribution or indemnity, any economic or moral loss, or direct, immediate, special, indirect or consequential damages) which do, may, or are alleged to arise as a result of
 - (i) the use of this material or documentation or ETS or any service connection therewith; or
 - (ii) any errors or omissions in data or any loss or partial loss of data or incomplete retrieval of information, even if any or all of the Department, the Minister or their employees were advised of the possibility of such risk, actions, claims or damages, including damages sustained or actions brought by third parties and claims made against the Subscriber by third parties.
3. The entire risk of loss relating to or associated with the quality and performance of ETS and any product and results thereof shall be assumed by the Subscriber and by any other user of ETS.

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1 INTRODUCTION

Bidding, a part of the Electronic Transfer System (ETS), enables clients to acquire Oil Sands (OS) and Petroleum and Natural Gas (P&NG) rights through an electronic bidding process. Clients will be able to select the parcels being offered for a sale, and if interested in acquiring the rights submit bid requests for a Public Offering using this system. Creating bid requests is available through a map interface (Query by Map) or by using Bid Request screen to select parcels.

This manual explains the steps required to initiate a bid request and how to submit requests to the Department of Energy. The processes involved are:

- Registration of Industry Clients as ETS Clients
- Designation of sign-on authorizations within client companies
- Preparation and submissions of bid requests
- Electronic notification of the availability of the agreement documents

Technical Requirements

Please refer to section 10 in [Client Account Guide](#) (under Help Manuals) to view Technical Requirements if you are experiencing problems accessing the system.

Contact Information:

How to set up an account; contact Client Registry at 780-422-5727.

How to create and submit a bid; contact Sales Help Desk at 780-644-2577.

If you are experiencing problems accessing the system; contact the ETS Help Desk (toll free) at 1-877-415-2009.

1.1 OVERVIEW

ETS is accessed through the Department of Energy’s (the department) website at www.energy.gov.ab.ca. The ETS website is a secure website that requires an authorized Account ID and password.

For information about site administrator accounts, logging in to ETS, creating client accounts, assigning roles, changing passwords, working with Request Status screen and setting account preferences please refer to Client Accounts Guide (under Help Manuals),

1.2 LOGGING IN

ETS is located at the following URL <https://ets.energy.gov.ab.ca/>

To Log on to ETS:

1. Type your Account ID, in the User Name text box.
2. Type your Password, in the Password text box.
3. Click Login.

This will display the ETS home page.

1.3 ACCOUNT PREFERENCES

The Account Preferences provides the user the ability to set default settings which would be used each time they access ETS. The Account level controls the defaults for deleting and viewing all requests; including agreement documents. The Comment field will be used to default the text into comment field of each created bid request.

The Bid Request Preferences allow the entry of users that will be defaulted onto each newly created bid request.

Account Preferences

Select Appropriate Preferences for Account:

General	Account level preferences:
	Delete requests after <input style="width: 40px;" type="text" value="35"/> Days (Request Status only)
	Difference between StartDate and EndDate <input style="width: 40px;" type="text" value="2"/> Days
	Comment: <input style="width: 100%;" type="text"/>
Options	Land Search Preferences
	Posting Request Preferences
	Bid Request Preferences

To change General Preferences:

1. Click the **ACCOUNT** folder, on the Main menu.
 2. Click **PREFERENCES** on the sub-menu.
 3. Enter the number of days before requests are deleted. (This is for all requests that are displayed in Request Status screen).
 4. Enter a number of days for the difference between StartDate and EndDate (the number of days for which results will be displayed in Request Status and Work In Progress (WIP)).
 5. Enter a comment to be displayed by default on all of your comment fields (optional).
- Only options assigned to user will be displayed for specific preference settings.*

To change Bid Request Preferences

1. Click **BID REQUEST PREFERENCES**, from the Account Preferences screen.
2. Click **ADD VIEWER** to add another user who can view all Bid Requests you have created.
3. Click **ADD SUBMITTER** to add a user who can submit requests that have been created by you.
4. Click **UPDATE** to save or **RESET** to cancel the changes.

NOTE: Use the **Delete** button to remove viewers or submitters.



*Bid request preferences are used to set up the default of who can view and submit **new** bidding requests. See Section **Error! Reference source not found. Error! Reference source not found.** for a description of the different roles*

1.4 RETRIEVING AGREEMENT DOCUMENTS

When the Department releases the agreement documents to ETS an e-mail will be sent to the applicable Designated Representative users. Agreement documents are available in the PDF and XML formats. To retrieve the agreement documents, the user needs to have **Viewer** role to **Agreements Documents**. The site administrator sets this up for each user in the **Assign Roles** folder in the **Client Accounts** folder under **Account**.



The e-mail sent only advises that agreements have been made available; it will not specify agreement numbers.

1.4.1 To View/Download a request

1. On the Main menu, click **REQUEST STATUS**.
2. **Under Form**, use the drop down arrow to select **AGREEMENT DOCUMENTS**.
3. Enter the Request number for a specific request or leave blank.
4. Enter a Start and End Date for the requests, or leave as default. (Remove the dates to retrieve all requests).
5. Click **RETRIEVE**.



If searching for more than one request use the Start and End dates to retrieve all requests created within those dates. The status of a Request will not automatically update on the screen. Click Retrieve to refresh the screen.

Request Status

Form: Request #:

Start Date: End Date:

Status:

Account:

The Request Status screen will display the requests for the criteria selected.

#	Sel	Form	Input File/Comment	Status	Date YYYY/MM/DD	Cost	Output Files	Creator
33510	<input type="checkbox"/>	Agreement Documents	Sale Date: 2003/01/08, Parcel A0002	COMPLETED	2006/01/26		XML File PDF File	ED2308

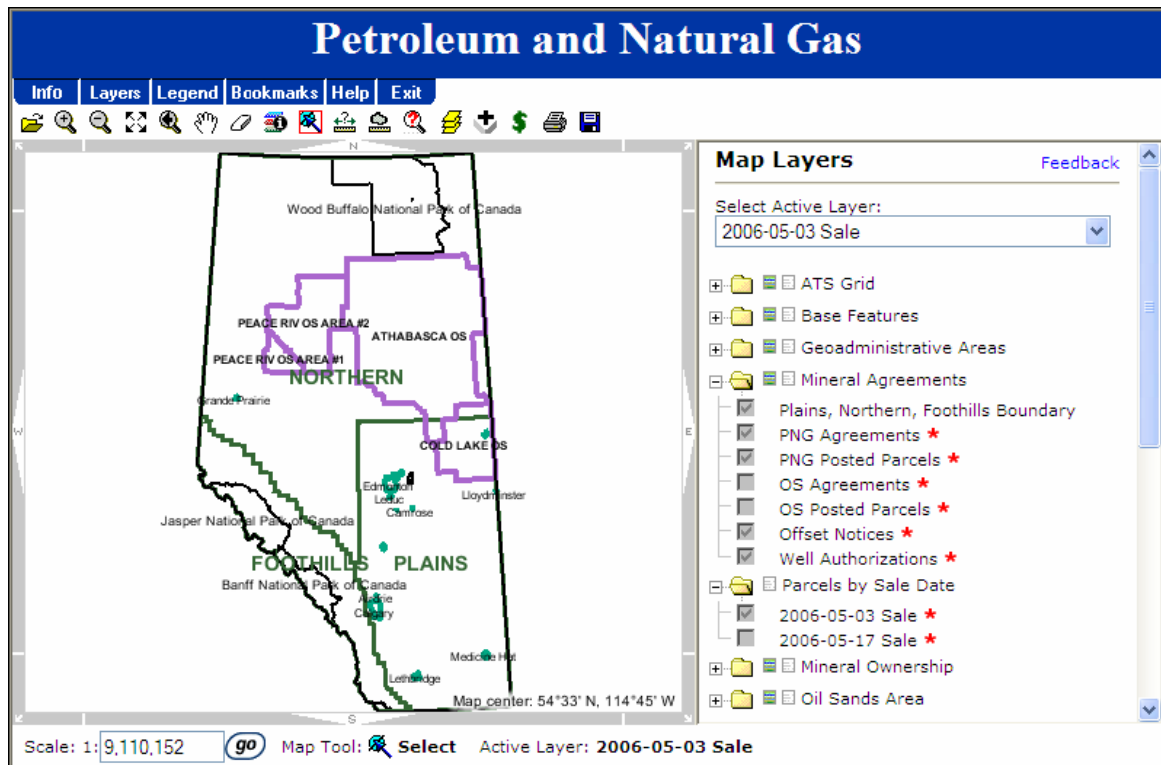
Page 1

2 QUERY BY MAP

There are two methods to create a Bid Request. Query by Map allows you to select parcels geographically and then load them to a bid request. The second method gives the user the option of selecting parcels using the parcel tab (see “3 Initiate Bid Request”). The “**PARCELS BY SALE DATE**” data layer contains separate parcel layers for each sale that is available. Sale dates are sorted chronologically and the next published sale date is turned on. The parcels for a sale are available for bidding eight weeks prior to the sale date and are not available after the sale has closed. The system limits one sale date layer to be selected at one time. Selected layers will display at the appropriate scale.

The “**PNG POSTED PARCELS**” and **OS POSTED PARCELS**” are separate layers. They include all posted PNG parcels and OS parcels respectively for all published sales.

Before using the map to search for parcels, set the *Select Active Layer* drop down list to a sale date layer (2006-05-03 Sale).



Find Tool 

The “**FIND**” tool allows the client to query an area of interest to determine if there are postings for a particular sale date. The Generate Query option table appears when the “**FIND**” tool is selected.

The client has the ability to query an area of interest by choosing *Township* under “**1. SELECT A LAYER**”. Key-in the Meridian-Range-Township (MRRTTT) for your area of interest under “**4. INPUT THE DATA VALUE**”.

GENERATE QUERY

1. Select a layer
Township ▼

2. Select a database field
LandKey ▼

3. Select a logical operator
= ▼

4. Input the data value
506057
Format: MRRTTT



1. Select a layer:

A query may be made on the active layer available.

- 2006-05-03 Sale
- Municipality
- PNG Agreements
- PNG Posted Parcels
- Township



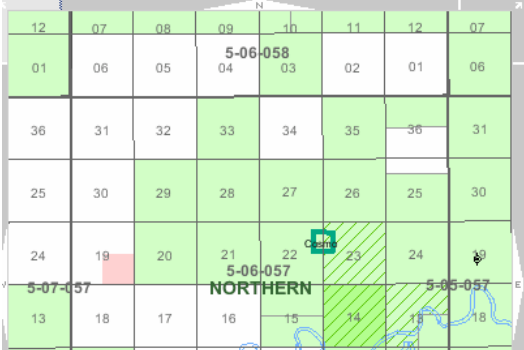
3. ..logical operator:

= *is used for 'exact' matches,*
Contain *can be used for a partial match.*

On **SUBMIT** , the system will run query and display results. If using MRRTTT, the system zooms to a map view of the selected feature

Petroleum and Natural Gas

Info Layers Legend Bookmarks Help Exit



Query Results - 1 record(s).

Township

LandKey: 506057

[Zoom to this feature](#)


End of Result Set

Identify Visible Tool 

The “**IDENTIFY VISIBLE**” tool drills down through the data layers and displays the information about the layers turned on under where the user clicked. Click anywhere on the sale parcel displayed on the screen and the Identify Results pop-up window will open.

Identify Results	
Coordinate Position	
Geographic: 53°55' N, 114°46' W	
PNG Posted Parcels	
Agreement Type:	P05
Agreement Number:	0506050132
Tract:	00
	View Detail Report
2006-05-03 Sale	
Parcel Number:	A0132
Posting Ag Type:	P05
AUDITLASTUPDATEDATE:	14-Apr-2006
	View Detail Report
Township	
LandKey:	506057
Plains, Northern, Foothills Boundary	
Name:	NORTHERN
End of Result Set	

Clicking on View Detail Report under either Posted Parcels (i.e. PNG Posted Parcels) or specified sale (i.e. 2006-05-03 Sale) section opens the Mineral Agreement Detail Report.


	
MINERAL AGREEMENT DETAIL REPORT	
Report Date: Monday, April 24, 2006 1:58:03 PM	
Agreement Number: P05 0506050132 Status: POSTED Sale or O/C Date: 2006-05-03 Cont Pending Flag: Agreement Expiry:	
LAND / ZONE DESCRIPTION	
Tract: 00 5-06-057: 14 PETROLEUM AND NATURAL GAS FROM SURFACE TO BASEMENT	

If there are restrictions displayed on the map view, clicking on View Detail Report under the Restrictions section shows the restrictions pertaining to the same area. Restrictions do not appear on all sale parcels.

Select Active Layer Tool 

The “Select” tool allows the client to select parcels to initiate the bidding process. The active layer must be set to the correct sale date.

 *Check the bottom of the map to verify Active Layer set.*

Map Tool:  **Select** Active Layer: **2006-05-03 Sale**

To select parcels directly from the map:

1. Select a parcel by clicking on the prescribed parcel on the map. **Selection Set** menu will appear. The **Selection** will read: 1 feature selected.
2. To choose another parcel for the bid request click on another parcel on the map. The **Selection Set** menu will read; **Just Selected:** 1 feature selected; **Previously selected;** 1 feature selected; Under **Options**, choose **Add** if you want to add this parcel to the list of parcels for the bid request. Continue choosing parcels by adding or subtracting parcels to those selected for the bid request.

Selection Set 

Layer:
2006-05-03 Sale

Selection:
1 features selected.

Options:

- Default Report** Show the default report for the selected features
- Zoom to Extent** Zoom the map to the extent of the selected features.

This layer is defined as a selected set type of layer. You may use the selection tool to refine your selected set so that it contains the desired features before executing the reporting routines.

Selected Set Layers Tool 

The “Selected Set Layers” tool gives the client the ability to view which parcels have been selected and the associated details.

Selection Set Layers

2006-05-03 Sale

Parcel Number: A0132
 Posting Ag Type: P05
 Agreement Name: POST-5 YR NORTHERN PNG LEASE
 Posting Ag No.: 0506050132
[Zoom to this feature](#)
[View Detail Report](#)

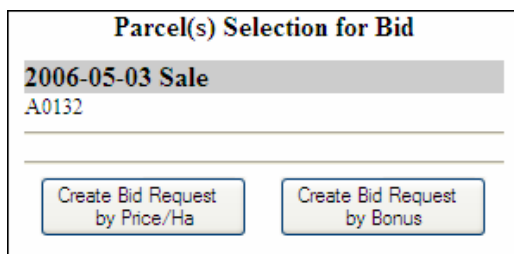
End of Result Set

Clicking on the **VIEW DETAIL REPORT** link displays detail information (Mineral Agreement Detail Report) for the Parcel Number or Posting Agreement Number selected.

Bid Request

To create a bid request for the selected parcel(s):

1. Select the **BID REQUEST TOOL**. The **Parcel(s) Selection for Bid** information panel will display the selected parcel(s).
2. Select one of the two options; **CREATE BID REQUEST BY PRICE/HA** or **CREATE BID REQUEST BY BONUS**.



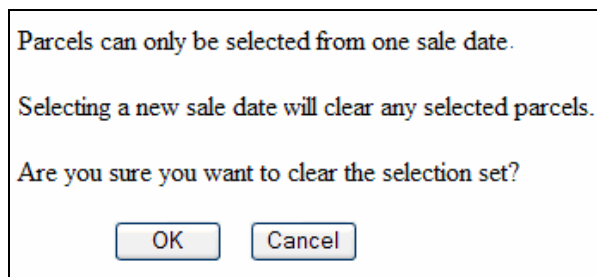
The Bid Request screen will open. The **SALE DATE** and **CALCULATE BID BY** will default according to the user selection from the map interface. The client information will default.

3. Select the **PARCEL** tab. The parcel information has been entered from the map. The user must fill in the Bonus or Price/Ha and the associated client information for each parcel.



Upon creating a bid request from the map, system opens a new ETS window (without a tree view on left side) to display bid request screens. Once changes on that request are done, user can click Close button to go back to the original ETS window. benefit

Parcels from more than one sale date layer can not be selected together. If the user selects a different sale date layer, the first selected parcels must be cleared before the client can view the next layer. If a selection has been made from one sale date layer and the client chooses to view a different sale date layer, the following message will appear.



Selecting the **OK** button will clear any selected parcels and the map will allow selection of parcels from the sale date layer. Selecting **CANCEL**, will leave the current sale date layer (unchanged) and any selected parcels from the layer will remain intact.

3 INITIATE BID REQUEST

3.1 PUBLIC OFFERING

The Public Offering option enables users to enter a bid request for the acquisition of P&NG and OS rights for a specific sale date. Users who wish to submit a bid request must fill in the information on the screens displayed below and then submit the request to the DOE.

To View the Public Offering Screen

- From the main menu select **BID REQUEST**, and then click **PNG AND OIL SANDS** and select **PUBLIC OFFERING**.
The Bid Request page will be displayed.

3.1.1 Request Detail Tab

The Request Detail tab enables users to enter or change information on the request.

Bid Request

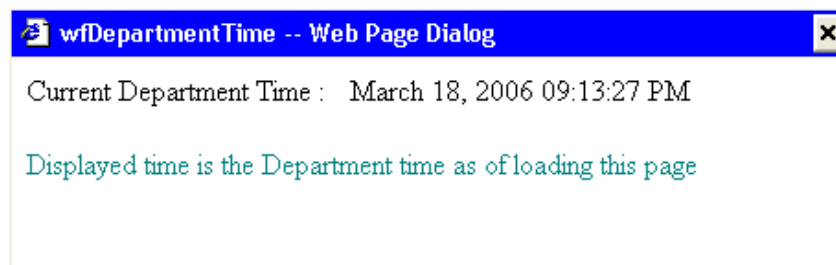
[Current Department Time](#)
[Bidding Rules](#)

Request Detail	Parcel	Roles
Comment:	<input style="width: 100%;" type="text"/>	
Sale Date:	2006/05/12 <small>YYY/MM/DD</small>	
Status:	Work in Progress	
Calculate Bid By:	Bonus *	
Created By:	ED2308	
Client Name (Bid Payor):	000-0036 001 413909 ALBERTA LTD. *	
Contact:	Nabil Salem M. - (780) 415-2097	
Contact Phone (Optional):	<input style="width: 100%;" type="text"/> (999) 999-9999	

◀▶

BIDDING RULES is a link to an html document that shows bidding rules.

CURRENT DEPARTMENT TIME is a link to a screen that shows the time used at the Department that will govern when the sale is closed.



Creating a Bid Request

1. Enter a comment to help remember the specific request (optional field).
The next sale date is displayed.
Use the drop-down arrow to change the **Sale Date**.
The status of the request will be displayed as work in progress.
2. Use the drop-down arrow to select the **CALCULATE BID BY**.
The Created By is defaulted based on the logged in user.



*Only the Coordinator can use the drop-down arrow to select a different **CREATOR**.*

3. Use the drop-down arrow to select the **CLIENT NAME (BID PAYOR)** or keep the default.



Client Name (Bid Payor) must have an Electronic Funds Transfer account setup.

4. Use the drop-down arrow to select the **CONTACT** person or keep the default (advisable). The contact person is the person the DOE contacts with any emails or phone calls. When the person creating the request wants to name another person as the Contact, they must first add the new person as a viewer.
5. Enter a second contact phone (optional field)
6. Click the right arrow to move to the next tab or click the **PARCEL** tab.



*To move to Parcel tab, make sure to have selected a value for both Calculate Bid By and Client Name (Bid Payor). Both of these fields have a red * next to them to indicate that they are mandatory. You can not save a request before choosing parcels.*

3.1.2 Parcel Tab

The Parcel tab enables users to Add or Delete Parcels and enters their corresponding client information.

Bid Request

[Current Department Time](#) [Bidding Rules](#)

Request Detail
Parcel
Roles

Parcel	Ha	Price/Ha	Bonus	Fee	Rent	Bid Amount	Delete
Please use the Add Parcel button to add the parcels for this Bid Request.							

Add Parcel

Surface Access Restrictions should be checked before making a bid.

Save
Close

1. Click the **ADD PARCEL** button; the **ADD PARCEL** screen will be displayed.

There are two ways to specify required parcels on this screen. Load from File or Select Parcel.

Method 1 – Load from File

Users can load the Parcels, monetary values and their client information from an XML or CSV file created using their in-house system.

1. Select the **LOAD FROM FILE** radio button.
2. Click **BROWSE** to find the file containing the XML or CSV file you have created and click Open from your **selection window**.

Load From File:
 Browse...

Once the file has been selected, scroll to the bottom of the screen to accept entry.

3. Click **OK**. The information will be entered on the **PARCEL** tab if the selected file contains no errors; otherwise, errors would show up on the **ADD PARCEL** screen.

See Appendix B for the format and examples of the CSV files to be used and a link to the template for creating the files. See the XML Schema manual for instructions on creating an XML file.

Sale Date : Jan 09, 2008 [Bidding Rules](#)

Options:

Load From File:

Select Parcel

Default Bonus:

All	Parcel	Ha	Price/Ha	Bonus	Mineral Type	Agreement Type	Metis
<input type="checkbox"/>	A0289	256.0000	<input type="text"/>	<input type="text"/>	PNG	LEASE	No
<input type="checkbox"/>	A0290	256.0000	<input type="text"/>	<input type="text"/>	PNG	LEASE	No
<input type="checkbox"/>	L0623	2,304.0000	<input type="text"/>	<input type="text"/>	OIL SANDS	LEASE	No

335 Parcel(s) found

Default Client Name

Lessee - (This is public information)	Percent
<input type="button" value="Add Lessee"/>	

Designated Representative:
Designated Representative is public information.

Confidential Rental Payor:
The Confidential Rental Payor can be changed.

Method 2 – Select Parcel

To select parcels directly in the screen

1. Use the Radio button to select **SELECT PARCEL** – Select Parcel is the default.
2. Select the check box located next to the required parcel numbers.
Click on the parcel number (**A0289**) to view lands and rights associated with the parcel. A popup window opens with the land and rights.
3. Enter the **BONUS** or **PRICE/HA** amount for the selected parcels depending on which one is enabled based on the selected value of **CALCULATE BID BY** in **REQUEST DETAIL** tab.
4. User can click on **DEFAULT CLIENT NAME** to default the value of Lessee and Designated Representative to the Client Name (Bid Payor). Lessee percent will be defaulted to 100.
or
- Click on **ADD LESSEE** button to show **CLIENT FIND** screen (See Section 3.1.2.1) to select Lessee(s). User needs to make sure that sum of Lessee(s) **PERCENT** sum up to 100.
- Click on button next to **DESIGNATED REPRESENTATIVE** to show **CLIENT FIND** screen to select Designated Representative.
5. The **CONFIDENTIAL RENTAL PAYOR** defaults to the **Bid Payor** for the bid request. This field is mandatory. The user can override the default by clicking on button and choosing a different client using the **CLIENT FIND** screen.
6. Click **OK**. The information will be entered on the **PARCEL** tab. **CLEAR** button resets all the values in the screen.



Parcels are listed originally in ascending order based on parcel number. User can re-sort parcels based on one of the following (Parcel, Mineral Type, All(Selected Parcels)) by clicking on the corresponding name in header of the parcels' list.

To select all parcels or to unselect them user can click on the check box in the header of the parcels' list.

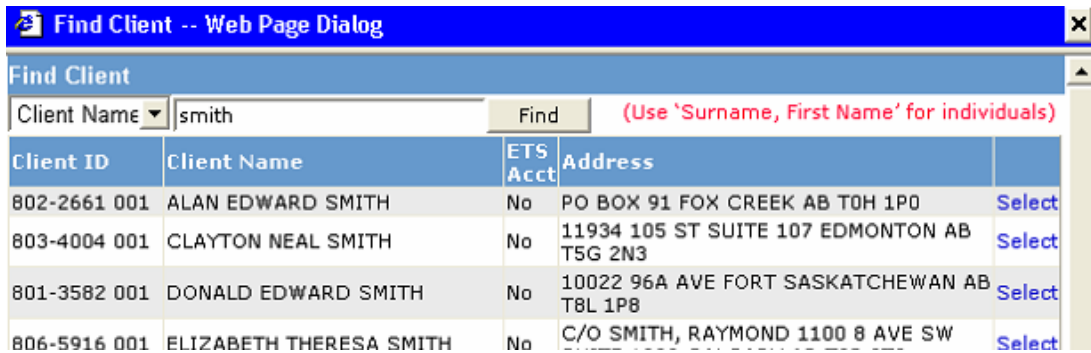
*User can set a default value for Bonus or Price/Ha and then click on **APPLY DEFAULT VALUE**. System resets the value of Bonus or Price/Ha of all selected parcels to the default value.*

Parcel	<i>Parcel number as it appears in the Public Offering Notice</i>
Ha	<i>Number of hectares in the parcel</i>
Price/Ha	<i>Value of how much to bid per Hectare</i>
Bonus	<i>The amount of money offered at a public offering for Crown mineral rights.</i>
Mineral Type	<i>Mineral type of the parcel (PNG or OIL SANDS)</i>
Agreement Type	<i>Agreement type of the parcel (i..e. Lease, Permit, etc.)</i>
Metis	<i>A Yes/No flag to determine if the parcel is a Metis parcel</i>
Lessee	<i>The client(s) who has an interest in the parcel</i>
Percent	<i>Percentage of the share of the Lessee</i>
Designated Representative	<i>The client who is designated as the representative of the lessee(s) to receive all correspondence from the Department relating to the agreement.</i>
Bonus or Price/Ha	<i>Bonus – The amount of money offered at a public offering for Crown mineral rights. Price/Ha – Price per hectare to acquire Crown mineral rights.</i>
Confidential Rent Payor (Optional)	<i>The client responsible for the payment of yearly rentals.</i>

- **Client Find**

This screen is used to find and select a Client Account (Lessee, Des. Rep., or Conf. Rental Payor). A search can be made by client name or client id.

1. Type the first four letters of the clients' last name or company name, and click **FIND**. The system will return all client names beginning with those four letters.
2. Choose the client and click '**SELECT**' at the end of the row. The name will be entered in the proper text box.



Client Id	Displays a list of Client Id's that match your selection criteria.
Client Name	Displays the corresponding clients name as registered with DOE.
ETS Account	Yes or No indicates if the client has an ETS account.
Address	The client address as registered with DOE.
Select	Click here to select the client name. This action will populate the Client Id into the search screen.



Designated Representative must have an ETS client.

- Modifying Parcel Information** [role = Creator]

Upon clicking **OK** on **ADD PARCEL** tab, system validates existing information and if they are valid the selected parcels will be created on the **PARCEL** tab. Each parcel will have its own client information (Lessee(s), Des. Rep., and Conf. Rental Payor). User can modify Bonus or Price/Ha of a parcel or change some or all its attached client information using similar functionalities that exist in **ADD PARCEL** screen. To re-calculate Bonus, Price/Ha, and Bid Amount user needs to click on **RE-CALCULATE** button.

ADD PARCEL button can be used to add more parcels into **PARCEL** tab. To delete parcels from **PARCEL** tab, user can select the check box at the end of each parcel line then click **DELETE SELECTED PARCEL(S)** button; upon acceptance of confirmation of action, system deletes selected parcel(s).

User can click on the “+” sign located next to parcel numbers to view client information and land and rights associated with each parcel. Changes done to one parcel are not replicated to other parcels.

COPY PARCEL button opens **COPY PARCEL** screen. This functionality gives user the option copy Bonus or Price/Ha and/or Client Information from one parcel to other parcels on the same bid request. (See Section 3.1.2.3).

Request Detail		Parcel		Roles			
Parcel	Ha	Price/Ha	Bonus	Fee	Rent	Bid Amount	Delete
- L0690	2,304.0000	8.68	20,000.00	625	8,064.00	28,689.00	<input type="checkbox"/>
OIL SANDS LEASE Metis: No							
Lessee						Percent	
Delete 000-0036 001 413909 ALBERTA LTD.						100.0000000	
Add Lessee							
Designated Representative:				000-0036 001 413909 ALBERTA LTD. ...			
Confidential Rental Payor (Optional):				...			
If Confidential Rental Payor is not selected Designated Representative will be used.							
Land and Rights							
5-08-088 1-3;10-15							
OIL SANDS BELOW THE TOP OF THE PEACE RIVER FM							
TO THE BASE OF THE PEKISKO FM							
+ L0691	2,304.0000	78.13	180,000.00	625	8,064.00	188,689.00	<input type="checkbox"/>
Total Bid : \$ 217,378.00 (CAD)							
Two hundred seventeen thousand three hundred seventy eight dollars							
Re-Calculate							
Add Parcel Copy Parcel Delete Selected Parcel(s)							
Please save this Bid Request before choosing Copy Parcel.							

Fee	Mineral agreement issuance fee
Rent	Annual rent
Bid Amount	The total bid amount includes the bonus amount, the agreement fee and the rental for the first year of the agreement.
Delete	Click here to select the parcel to delete it after clicking on Delete Selected Parcel(s) button.

• **Copy Parcel**

To copy information from one parcel to others:

1. Select a **SOURCE PARCEL** from the list of values.
2. Select one or more destination parcels by clicking on the check box next to each parcel number.
3. To copy bonus, select the **COPY BONUS** check box.
If bid is created by Price/Ha, this check box will be called **COPY PRICE/HA**.
4. To copy client information, select **COPY CLIENT INFORMATION**.
5. Click **OK** to perform the copying, or click **CANCEL** to cancel copy operation.



To make sure that you are copying the right information, save request before performing Copy Parcel operation. Unsaved changes are lost when performing Copy Parcel operation.

Copy Parcel

Sale Date: May 12, 2006

Source Parcel:

Bonus: 20,000.00

Mineral Type: OIL SANDS **Agreement Type:** LEASE **Metis:** No

Lessee	Percent
000-0036 001 413909 ALBERTA LTD.	100.0000000

Designated Representative : 000-0036 001 413909 ALBERTA LTD.

Confidential Rental Payor :

All	Parcel	Ha	Price/Ha	Bonus	Mineral Type	Agreement Type	Metis
+ <input type="checkbox"/>	L0690	2304.0000	8.68	20,000.00	OIL SANDS	LEASE	No
+ <input type="checkbox"/>	L0691	2304.0000	78.13	180,000.00	OIL SANDS	LEASE	No

Copy Bonus Copy Client Information

3.1.3 Roles Tab

The Roles tab is used to define who can submit your bid request and who can view it and this needs to be done for every bid request.

Bid Request

[Current Department Time](#) [Bidding Rules](#)

Request Detail
Parcel
Roles

Viewers

ED2308_Viewer	<input type="button" value="Delete"/>
<input style="width: 90%;" type="text"/>	<input type="button" value="Add"/>

Submitters

ED2308_Submitter	<input type="button" value="Delete"/>
<input style="width: 90%;" type="text"/>	<input type="button" value="Add"/>

To Add a Viewer (Optional)

1. Use the drop-down arrow to select users who can view requests. All client IDs with viewer roles will be listed.
2. Click **ADD**.
3. Continue adding **VIEWERS** as necessary.

To Add a Submitter

1. Use the drop-down arrow to select who can submit requests. All client IDs with submitter roles will be listed.
2. Click **ADD**.
3. Continue adding **SUBMITTERS** as necessary.



Submitters and viewers will default with who was set up in your account preferences.

It is not necessary to add a viewer to your request.

To Delete a Viewer/Submitter

1. Click the **DELETE** button beside the name of the **VIEWER** or **SUBMITTER** you want to remove.

3.1.4 To Save your Request

Bid Request 34073

[Current Department Time](#)
[Bidding Rules](#)

Request Detail
Parcel
Roles

Comment:

Sale Date: May 12, 2006

Status: Work in Progress

Calculate Bid By: Bonus *

Created By: ED2308

Client Name (Bid Payor): 000-0036 001 413909 ALBERTA LTD. *

Contact: Nabil Salem M. - (780) 415-2097

Contact Phone (Optional): (999) 999-9999

◀

Submit
Delete
Save
Close

▶

1. Click **SAVE**. The bid request number will be displayed at the top of the screen.



When you save your request any errors will be displayed at the top of the screen, errors will include any incorrect or missing information. A set of warnings might also appear for general warnings that do not prevent a bid request from being submitted.

If there are no errors a link to your Original Bid Request Document will be displayed. If you are a Submitter, the Submit button will be enabled, otherwise the person chosen as the Submitter for this request will be required to log onto the system and submit the request.



User can save request as many times as needed as long as the sale is not closed yet.

3.1.5 To Submit your Request [role = Submitter]

1. Click **SUBMIT**. A confirmation message will appear, upon acceptance system validates the request and if no errors are encountered, request will be submitted to the Department if sale is not closed. **STATUS** changes to Submitted and **SUBMIT** button changes to **WITHDRAW AND EDIT**.



Once submitted only the contact name, contact phone, or Created By can be changed and saved without withdrawing the submission.



*If user wants to make changes to a submitted bid request, he/she should click on **WITHDRAW AND EDIT** button to set the status back to Work in Progress. Upon confirmation, the bid request is no longer considered submitted to the department. After finalizing changes, user must submit the request again to the Department to participate in the sale.*

3.1.6 To Delete your Request [role = Creator, Submitter, Coordinator]

1. Click **DELETE**. A confirmation message will appear; upon acceptance system sets the status of the request to Client Cancelled. User can not do any editing on cancelled bid requests. **DELETE** button is only enabled while the request is in Work in Progress status.

3.1.7 Close button

Upon clicking on Close button, system warns user that any unsaved changes will be lost. Upon acceptance of confirmation system will do one of the following:

- 1- If bid request screen was opened from query by map, system will close the current screen and control returns back to original ETS screen.
- 2- If bid request was opened from Work in Progress screen, system will close the current screen and control returns back to Work in Progress screen.
- 3- If bid request was opened from Public Offering menu, system will close the current screen and control returns back to ETS home page.

4 WORK IN PROGRESS

The Work in Progress screen is accessed from the ETS main menu under Bid Request. This screen enables you to search for, review and edit bid requests and to track their progress.

4.1 RETRIEVING & REVIEWING BID REQUESTS

The Work in Progress screen enables users to search for bid requests by specifying various criteria.

Work in Progress

Type:	Bid Request	Request Number:	
Start Date:	2006/03/14	End Date:	2006/03/19
Status:			
Account:			

To View Requests

1. Click **BID REQUEST**, from the **MAIN MENU**.
2. Select **WORK IN PROGRESS**.
The Work in Progress screen will be displayed.
3. Use the drop-down arrow to select the type of work to be viewed.
4. Enter the **REQUEST NUMBER** (if known), or enter a **START** and **END** dates during which the request was created. Dates defaulted depend on the Start and End dates in preferences screen.
5. Use the drop-down arrow to select a particular **STATUS** or leave blank to select all Requests during the date range.
6. Click **FIND**.
Work in Progress results are listed in descending order from the most recent updated Request.



Use the drop-down arrow to select an **ACCOUNT** to limit search results to requests that have the selected account as a viewer, submitter, creator, or contact. Leave blank to select all accounts. This option shows only to accounts with coordinator role.

The Work in Progress List

#	Comment	Status	Files	Sale Date YYYY/MM/DD	Last Updated YYYY/MM/DD ▼	Creator
34073		Work in Progress	Sum: Pdf Detail: Pdf TieBid: XmlCsv	2006/05/12	2006/03/18 22:11:41	ED2308

Page 1

Note:

Results of your query may be re-sorted by clicking on the column headers of the Results grid. If the cursor changes to a hand when you mouse over a column heading you can re-sort the column.

#	The ETS request number.
Comment	Optional comment entered by the request creator to help identify the specific request.
Status	The status of your request. See Appendix A for Progress Request Status Codes.
Files	This column displays the original request file in its summary and details format and the Tie-Bid documents if applicable. The most recent update of the file is available for download.
Sale Date	The sale date which the bid request is placed against.
Last Updated	The date the file was last updated.
Creator	The person who is indicated as the creator of the request.

1. Click the Request number to open the original request.
2. Click PDF under Files to see the original bid request report.
3. Click XML under Files to see the original bid request report.
4. Click CSV under Files to see the original bid request report.

5 TIE BIDS

If two or more companies submit the same bid value on a parcel and that value is the highest submitted value, the Department will inform those companies to place another bid on that tie parcel and will set a deadline for the re-submission.

To place a higher bid on a tie parcel, do the following:

1. Click on **BID REQUEST** menu, then **TIE BID**.
2. If there is one tie bid parcel, system will show the original submitted values.
3. If there are multiple tie bid requests, system will list all available bid request numbers in a list. User will have to select one bid request at a time. Click on **RETRIEVE BID INFORMATION**.
4. Enter the new value for Bonus or Price/Ha.
5. Click **RE-CALCULATE** to see the new Bid Amount.
6. Click **SUBMIT** button to submit to the Department. Click **CLEAR** to cancel re-submission and refresh screen.
7. Click **OK** to confirm re-submission to the Department.

Tie Bid

[Bidding Rules](#)

Request Number : ▼

Parcel	Ha	Price/Ha	Bonus	Fee	Rent	Bid Amount
+ A0341	256.0000	<input style="width: 80px;" type="text" value="66.41"/>	<input style="width: 80px;" type="text" value="17,000.00"/>	625	896.00	18,521.00

Total Tie Bid Amount: \$ 18,521.00 (CAD)
Eighteen thousand five hundred twenty one dollars

APPENDIX A – BID REQUEST STATUS CODES

Status	Description
Client Cancelled	If the user want to cancel the request and sale is not closed yet, click Delete.
Completed	When Sale is closed, submitted requests' status changes to Completed.
Work in Progress	Status given to a request when it is created and saved.
Submitted	The status changes to Submitted when the client submits the request.

APPENDIX B – INPUT FILE FORMATS

This appendix describes the format of the file to be used in **LOAD FROM FILE** option in Add Parcel screen. Input files can be created in one of two formats CSV or XML.

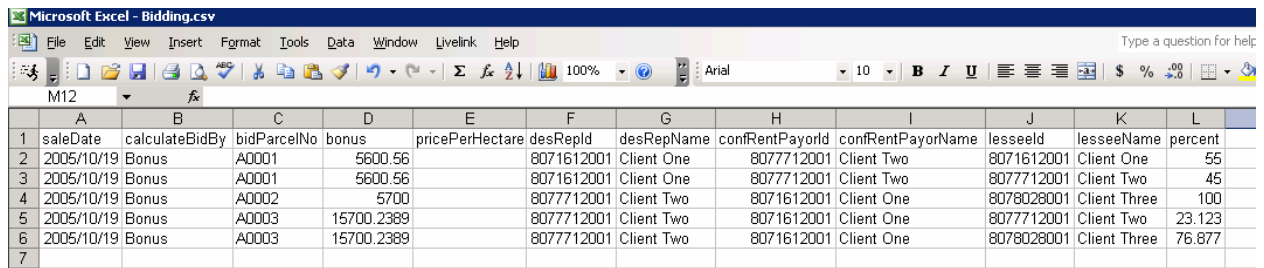
CSV File Example

Comma Separated Values (CSV) input files contain a header, which identifies the names of the columns contained in the file. The data must be in CSV format.

An example of a user-defined CSV file is shown below. Note that the first line is dedicated for the headers of the columns.

saleDate,calculateBidBy,bidParcelNo,bonus,pricePerHectare,desRepId,desRepName,confRentPayorId,confRent PayorName,lesseeId,lesseeName,percent

```
2005/10/19,Bonus,A0001,5600.56,,8071612001,Client One,8077712001,Client Two,8071612001,Client One,55
2005/10/19,Bonus,A0001,5600.56,,8071612001,Client One,8077712001,Client Two,8077712001,Client Two,45
2005/10/19,Bonus,A0002,5700,,8077712001,Client Two, 8071612001,Client One,8078028001,Client Three,100
2005/10/19,Bonus,A0003,15700.2389,,8077712001,Client Two, 8071612001,Client One,8077712001,Client
Two,23.1234567
2005/10/19,Bonus,A0003,15700.2389,,8077712001,Client Two, 8071612001,Client One,8078028001,Client
Three,76.8765433
```



	A	B	C	D	E	F	G	H	I	J	K	L
1	saleDate	calculateBidBy	bidParcelNo	bonus	pricePerHectare	desRepId	desRepName	confRentPayorId	confRentPayorName	lesseeId	lesseeName	percent
2	2005/10/19	Bonus	A0001	5600.56		8071612001	Client One	8077712001	Client Two	8071612001	Client One	55
3	2005/10/19	Bonus	A0001	5600.56		8071612001	Client One	8077712001	Client Two	8077712001	Client Two	45
4	2005/10/19	Bonus	A0002	5700		8077712001	Client Two	8071612001	Client One	8078028001	Client Three	100
5	2005/10/19	Bonus	A0003	15700.2389		8077712001	Client Two	8071612001	Client One	8077712001	Client Two	23.123
6	2005/10/19	Bonus	A0003	15700.2389		8077712001	Client Two	8071612001	Client One	8078028001	Client Three	76.877
7												



Parcels with multiple Lessee(s) will have multiple consecutive lines in the .csv file have same content except for the lessee and its percentage.

saleDate	The date of sale for which bid request are created
calculateBidBy	How to create the bid by Bonus or Price/Ha. Can't have combination of both.
bidParcelNo	Parcel number
Bonus	If bidding by bonus then fill with value otherwise leave blank
PricePerHectare	If bidding by price/ha then fill with value otherwise leave blank
desRepId	Client Id of designated representative
desRepName	Client Name of designated representative
confRentPayorId	Client Id of confidential rental payor
confRentPayorName	Client Name of confidential rental payor
lesseeId	Client Id of Lessee
LesseeName	Client Name of Lessee
Percent	Percentage of interest of the lessee

XML File Schema

Please read the document XML Schema for instructions on how to build the XML file.

```
<?xml version="1.0"?>
<xs:schema xmlns:tns="http://schemas.xmlsoap.org/soap/envelope/" attributeFormDefault="unqualified"
elementFormDefault="qualified" targetNamespace="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:import />
  <xs:element name="Envelope">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="Header" />
        <xs:element name="Body">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="ADD_BID_001" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```

```
<?xml version="1.0"?>
<xs:schema attributeFormDefault="unqualified" elementFormDefault="qualified"
xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:element name="ADD_BID_001">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="CNTROLAREA">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="BSR">
                <xs:complexType>
                  <xs:sequence>
                    <xs:element name="VERB" type="xs:string" />
                    <xs:element name="NOUN" type="xs:string" />
                    <xs:element name="REVISION" type="xs:unsignedByte" />
                  </xs:sequence>
                </xs:complexType>
              </xs:element>
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="DATAAREA">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="BID">
                <xs:complexType>
                  <xs:sequence>
```

```

<xs:element name="saleDate" type="xs:string" />
<xs:element name="calculateBidBy" type="xs:string" />
<xs:element name="bidParcels">
  <xs:complexType>
    <xs:sequence>
      <xs:element maxOccurs="unbounded" name="bidParcel">
        <xs:complexType>
          <xs:sequence>
            <xs:element name="bidParcelNo" type="xs:string" />
            <xs:element name="bonus" type="xs:decimal" />
            <xs:element name="pricePerHectare" />
            <xs:element name="desRepId" type="xs:unsignedLong" />
            <xs:element name="desRepName" type="xs:string" />
            <xs:element name="confRentPayorId" type="xs:string" />
            <xs:element name="confRentPayorName" type="xs:string" />
            <xs:element name="lessees">
              <xs:complexType>
                <xs:sequence>
                  <xs:element maxOccurs="unbounded" name="lessee">
                    <xs:complexType>
                      <xs:sequence>
                        <xs:element name="lesseeId" type="xs:unsignedLong" />
                        <xs:element name="lesseeName" type="xs:string" />
                        <xs:element name="percent" type="xs:decimal" />
                      </xs:sequence>
                    </xs:complexType>
                  </xs:element>
                </xs:sequence>
              </xs:complexType>
            </xs:element>
          </xs:sequence>
        </xs:complexType>
      </xs:element>
    </xs:sequence>
  </xs:complexType>
</xs:element>
</xs:schema>

```

Sample XML File

```

<?xml version="1.0" encoding="UTF-8"?>
<!--Add BID-->
<SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/">
  <SOAP-ENV:Header/>
  <SOAP-ENV:Body>
    <ADD_BID_001>
      <CNTROLAREA>
        <BSR>
          <VERB>ADD</VERB>
          <NOUN>BID</NOUN>
          <REVISION>001</REVISION>
        </BSR>
      </CNTROLAREA>
      <DATAAREA>
        <BID>
          <saleDate>2005/10/19</saleDate>
          <calculateBidBy>Bonus</calculateBidBy>
          <bidParcels>
            <bidParcel>
              <bidParcelNo>A0001</bidParcelNo>
              <bonus>5600.35</bonus>
              <pricePerHectare/>
              <desRepId>8071612001</desRepId>
              <desRepName>Client One</desRepName>
              <confRentPayorId>8077712001</confRentPayorId>
              <confRentPayorName>Client Two</confRentPayorName>
              <lessees>
                <lessee>
                  <lesseeId>8071612001</lesseeId>
                  <lesseeName>Client One</lesseeName>
                  <percent>55</percent>
                </lessee>
                <lessee>
                  <lesseeId>8077712001</lesseeId>
                  <lesseeName>Client Two</lesseeName>
                  <percent>45</percent>
                </lessee>
              </lessees>
            </bidParcel>
            <bidParcel>
              <bidParcelNo>A0002</bidParcelNo>
              <bonus>5700</bonus>
              <pricePerHectare/>
              <desRepId>8077712001</desRepId>
              <desRepName>Client Two</desRepName>
              <confRentPayorId>8077712001</confRentPayorId>
              <confRentPayorName>Client One</confRentPayorName>
              <lessees>
                <lessee>
                  <lesseeId>8078028001</lesseeId>

```

```
<lesseeName>Client Three</lesseeName>
<percent>100</percent>
</lessee>
</lessees>
</bidParcel>
<bidParcel>
<bidParcelNo>A0003</bidParcelNo>
<bonus>15700.2389</bonus>
<pricePerHectare/>
<desRepId>8077712001</desRepId>
<desRepName>Client Two</desRepName>
<confRentPayorId>8077712001</confRentPayorId>
<confRentPayorName>Client One</confRentPayorName>
<lessees>
<lessee>
<lesseeId>8077712001</lesseeId>
<lesseeName>Client Two</lesseeName>
<percent>23.1234567</percent>
</lessee>
<lessee>
<lesseeId>8078028001</lesseeId>
<lesseeName>Client Three</lesseeName>
<percent>76.8765433</percent>
</lessee>
</lessees>
</bidParcel>
</bidParcels>
</BID>
</DATAAREA>
</ADD_BID_001>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

APPENDIX C – REPORTS
Original Bid Request Summary

ELECTRONIC TRANSFER SYSTEM							Page: 1
Original Bid Request (Summary) 33540							
Sale Date: Mar 15, 2006							
Status: Work in Progress							
Submission Date: NOT SUBMITTED							
Submitted By:							
Creation Date: Feb 08, 2006 04:50:20 PM							
Created By: ED2308							
Last Updated Date: Feb 08, 2006 04:50:20 PM							
Client Name (Payor): 000-0036 001 413909 ALBERTA LTD.							
Contact: Nabil Salem M.							
Contact Phone: (780) 415-2097							
Contact Phone (Optional):							
Contact Email: Nabil.Salem@gov.ab.ca							
Comment:							
Total PNG Bid Request Amount: \$ 13,521.00							
Thirteen thousand five hundred twenty one dollars							
Total Oil Sands Bid Request Amount: \$ 0.00							
Zero Dollars							
Total Bid Request Amount: \$ 13,521.00							
Thirteen thousand five hundred twenty one dollars							
 PNG LEASE(S)							
Parcel Metis	Hectares	Price/Ha	Bonus	Fee	Rent	Bid Amount	

A0341 No	256.0000	46.98	12,000.00	625	896.00	13,521.00	

PNG Total							
Lease(s)							
1	256.0000	46.98	12,000.00	625	896.00	13,521.00	
Total							
1	256.0000	46.98	12,000.00	625	896.00	13,521.00	

PNG / OIL SANDS Grand Total							
1	256.0000	46.98	12,000.00	625	896.00	13,521.00	

APPENDIX D – WARNINGS AND ERROR SCREENS

Multiple Login

If the user opens multiple ETS screens from the same browser window using (File/New) option or by using shortcuts then the user did logout from one browser and log in again as another user. System will log user out from all the sessions and a warning will show up to inform user about this change.

Electronic Transfer System

**You have been logged out of ETS Account EA0270.
Currently you are logged in as EA0267**

- ETS automatically logs you out of your account when it detects that you've logged out from another browser window, or when you log in to another ETS account from another browser window. This is done to protect your ETS account, and to ensure the privacy of your information.

[Feedback Content](#) --- [Feedback Technical](#) --- [Help Text](#)

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Internal Error

If the user inputs invalid data (i.e. special characters <, >, etc.) or uses the back button (highly advisable not to be used while creating a bid request) of the internet browser, system may reject the information and an internal error screen appears.

Electronic Transfer System

Internal Error

Please report this problem to Energy Information Centre at (403) 297-6324.

or send an email to: [ETS](#)

[Feedback Content](#) --- [Feedback Technical](#) --- [Help Text](#)

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Page Expired

If the user tries to use the Back button on the toolbar of Internet Browser while working with ETS, user might get the following screen. (It is highly advisable not to be used while creating a bid request).

Warning: Page has Expired

The page you requested was created using information you submitted in a form. This page is no longer available. As a security precaution, Internet Explorer does not automatically resubmit your information for you.

To resubmit your information and view this Web page, click the **Refresh** button.