

Agreement Management Government of Alberta

Welcome!

To the ETS – Agreement Management Authorization Online Training Course

Agreement Management – Authorization: This process involves authorizing a company to act on behalf of the designated representative for a Crown PNG agreement.



## **Revisions Table**

Date	Revisions Type	Page Number
March 10, 2017	Initial Creation	All
June 2020	Update Banner and add Resource Page	All
October 2020	Updated	Various







## In this module you will learn how to:

As the company submitting the request for Authorization:

- Complete a Agreement Management Authorization Request
- Check the status of your request

As the company authorizing the request:

- How to concur
- How to reject
- · How to revoke

## **Course Pre-requisites:**

- Training System Overview
- ETS Account Setup and Preferences (For Site Administrators)
- You must have the Creator role to create or withdraw a request and the Submitter role to submit a request

Alberta

## Authorization – Select Authorization Form Type

Authorization						
Type: Request Number: Agreement: Expiry Date:	From	Rental Reinstatement Surrender To	<ul> <li>✓ Show Approved</li> <li>✓ Show Concur</li> <li>✓ Show Pending</li> <li>✓ Show Granted</li> <li>Show Rejected</li> </ul>			
		Search Request Authorization				

Туре	Description
Rental Reinstatement	Use this form type for a PNG agreement, to authorize someone other than the Designated Representative on a Rental Reinstatement.
Surrender	Use this form type for a PNG agreement, to authorize someone other than the Designated Representative to Surrender an agreement.



Authorization for Rental Reinstatement and Surrender must be requested before a Rental Reinstatement or Surrender can be submitted.

Aberta

## **Create Authorization – Request Authorization**



Expand Agreement Management and Select Authorizations. The Request Authorization screen will populate. Select Surrender from the Authorization Type in the drop down box. You will then select an Authorization Expiry date from the drop down. Selection can be up to one year from the current date.

Request Authorization

3. Select	Authorization Type:	Surn	ender	~						
Authorization	Authorization Expiry:									
Туре	Requesting Company:	•	D	ecen	nber,	, 201	7	•	~	
	Contact In	Su	Мо	Tu	We	Th	Fr	Sa		
		26	27	28	29	30	1	2	~	
4. Select	First Name:		4	12	12	7	15	9		
Authorization	Last Name:	10	18	12	20	21	22	23		
Expiry	Phone:	24	25	26	27	28	29	30		
	Fax:	31	1	2	3	4	5	6		
	Email:	ĺ								
		۹						ł		
	Agreement(s) to	be /	utho	orize	d					
Add Agreement										
						-	-			

Close

Submit

The authorization expiry date must be a future date, it cannot be a past date or the current date. The authorization expiry date is how long you will allow the authorization to be valid. It cannot be more than a year.



In the **Requesting Company** drop down box select the company requesting authorization from the Designated Representative. Then complete the **Contact Information** including phone number of the requesting company. If you do not include the phone number an error will occur. Select **Add Agreement**, this will populate **Search Agreements**.

Request Au	thorization	
Authorization Type:	Surrender V	1. Select Requesting
Authorization Expiry:	2017/12/31 ×	Company
Requesting Company:	XYZ Company	
Contact In	formation Tracey Mason	2. Select Contact
First Name:	Тгасеу	Information
Last Name:	Mason	
Phone:	(780) 422-9108 Ext	3. Complete
Fax:		Number
Email:	Tracey.Mason@gov.ab.ca	
Agreement(s) to Add Agr	o be Authorized	4. Select Add Agreement
Submit	Close	



Enter the **Agreement Number** of the surrender you are requesting the authorization from the Designated Representative.

Request Au	thorization
Authorization Type:	Surrender V
Authorization Expiry:	2017/12/31
Requesting Company:	✓
Contact Ir	Iformation
	Tracey Mason
First Name:	Tracey
Last Name:	Mason
2. Select Search Mark 001 1 2. Select Search Search	set Close



The Agreement will populate in the **Agreements Found** box. Confirm the agreement by placing a **check mark** in the confirmation box beside the Agreement Number and select **Ok**.

		Request	Authorization
		Authorization Ty Authorization Expi Requesting Compa	pe: Surrender ♥ ry: 2017/12/31 my: ♥
		Contac	Tracey Mason
		First Nan	ne: Tracey
1. Place Check		Pho	ne: (780) 422-9108 Ext
Mark		Em	ail: Tracey.Mason@gov.ab.ca
		-	· · · ·
		Agreem	ents Found
	Agreement No.	Expiry Date	Designated Representative
	001 1000 2	020/12/15 A	3C Company
_	2. Select Ok	ОК	Cancel



The agreement will now show at the bottom of the **Request Authorization** screen along with the **Authorization Type**, **Requesting Company** and **Contact Information**. Select **submit**.

## **Request Authorization**

Authorization Type: Authorization Expiry:	Surrender V 2017/12/31
Requesting Company:	XYZ Company
Contact In	formation
	Tracey Mason
First Name:	Tracey
Last Name:	Mason
Phone:	(780) 422-9108 Ext
Fax:	
Email:	Tracey.Mason@gov.ab.ca
Agreement(s) t	o be Authorized
Agreement Designated Repres	sentative Attention
001 1000 ABC Company	Angel Best 🗙 🗙
1. Select Submit	eement
Submit	Close



After submitting your **Request Authorization** and the information is submitted, a **Request Number** will populate. You can now **Close** the screen. You have successfully completed the **Surrender Authorization**.





Once the **Surrender Authorization** has been submitted, the Designated Representative of the surrender agreement will receive notification to **Concur** the **Surrender Authorization**.

SAMPLE

From: Energy ETS AT Support <ENERGY.ETSATSupport@gov.ab.ca> To: XYZ Company Subject: Agreement Management Authorization

EXTERNAL SENDER. Do not open links or attachments that are unexpected. Do not give out User IDs or Passwords.

Please sign on to the Electronic Transfer System (ETS) website, available through <u>Alberta.ca</u>, and Concur to Authorization Request Number 385524 with account EA0367\_SURRENDALL.

Do not reply to this EMail. If you have any questions or concerns please contact ets@gov.ab.ca.



## **Authorization – Concur Authorization**

The Concurring company will expand the **Agreement Management** node and select **Authorizations**. The **Authorization** screen will populate and select **Show Pending**, then **Search**.





All **Pending Surrender Authorizations** will populate for the **Concurring Designated Representative**. Select the **Request** you want to **Authorize**.

Authorization						
Type:	~	Show Approved				
Request Number:		Show Concur				
Agreement:		Show Pending				
Expiry Date:	From To	Show Granted				
		Show Rejected				
		Show Revoked				
	Search Request Authorization					

		Pending Authorizations							
1. Select	Request	Authorization Type	Agreement/Well	Authorizing Company	Expiry yyyy/mm/dd				
7	<u>385519</u>	Surrender	001 3000	ABC Company	2017/09/01				
N	<u>385522</u>	Surrender	001 2000	ABC Company	2017/12/31				
	<u>385524</u>	Surrender	001 1000	ABC Company	2017/06/02				



The Concur Authorizations will appear at the bottom of the Authorization screen. You will then select Concur

	Αι	Ithorization		
Type: Request Number: Agreement: Expiry Date:	From	✓ To	<ul> <li>Show Approved</li> <li>Show Concur</li> <li>Show Pending</li> <li>Show Granted</li> <li>Show Rejected</li> <li>Show Revoked</li> </ul>	
	Search	Request Authorization		1. Select Concur
uest Authorization	Cor Agreement/Well	ncur Authorizations Requesting Company	Expiry vvvv/mm/dd	
524 Surrender	001 1000	ABC Company	2017/06/02	Concur



After you select **Concur**, the **Concur Authorization** screen will populate. Beside **Concurrence**, a drop down box will appear and you will select either **Yes** or **No**. After making your selection click on **Submit**.

## **Concur Authorization**





After you select submit, the **Concur Authorization** screen will populate indicating the **Request Number** and the **Concurrence** have been submitted. You can now **Close** the screen.

	Concur Authorization						
Request Number: Concurrence:	385524 Yes ✔	Authorization Request					
	Submit	Close 1. Select Close					

The **Request Authorization** screen will appear confirming the **Authorization** has been submitted and the **Request Number** will populate. You can now **Close** the screen, this process has been completed.





SAMPLE

A notification will be sent to the Surrender Authorization requester to confirm the request has been completed.

## From: Energy ETS To: ABC Company Subject: Agreement Management Authorization

EXTERNAL SENDER. Do not open links or attachments that are unexpected. Do not give out User IDs or Passwords.

Please sign on to the Electronic Transfer System (ETS) website, available through <u>Alberta.ca</u>, and Concur to Authorization Request Number 385524 with account EA0331\_SURR.

Do not reply to this EMail. If you have any questions or concerns please contact ets@gov.ab.ca.

Aberta

## Agreement Management Government of Alberta

## Authorization – Revoke Authorization

Once the request has been completed, accessing the **Authorization** screen will list: **Approved**; **Concur**; **Pending**; **Granted**; **Rejected**; and **Revoked Authorizations** by choosing the **filter buttons**, then selecting **Search**.



054 5411120480

054 5411120480

Agreement/Well

XYZ Company

Pending Authorizations

ABC Company

Authorizing Company

ABC Company

<u>385522</u>	Surrender	054 5411120480	ABC Company

385524

Request

385519

Surrender

Surrender

Tvpe

Authorization

2017/06/02

2017/09/01

Expiry

yyyy/mm/dd



On the **Authorization Screen**, when you select the **Request** Number, example **3895524**. This will populate a PDF document of the Authorization.

Alberta			
Tenure	ELECTRONIC TRANSFER SYSTEM	February 14, 2017	
9945 - 108 Street	AGREEMENT MANAGEMENT	3:18:43 PM	SAIVIFLE
Edmonton, Alberta, TSK 2G6	AUTHORIZATION		
		ETS # 385524	
Authorization For			
Surrender			
Requesting Company			
Company Name	XYZ Company		
Creator:	EA0367_SURRENDALL		
Contact			
First Name:	Tracey		
Last Name:	Mason		
Phone:	(780) 422-9108 EXT:		
Fax:			
Email:	Tracey.Mason@gov.ab.ca		
Agreement			
Amount Travi	001		
Agreement Number:	1000		
Agreement Humber.			
Authorizing Company			
Company Name:	ABC Company		
Authorization Expiry:	June 02, 2017		
Concurred Date:	February 14, 2017		
Contact:			
First Name:	Tracey		
Last Name:	Mason		
Phone:	(780)422-9108		
Fax:			
Email	Tracey.Mason@gov.ab.ca		

\*\*\* End of Report \*\*\*

Page 1



To **Revoke** an **Approved Authorization**, select **Agreement Management** then select **Authorizations**. Using the Filter buttons select **Show Approved** agreements, then select **Search**. Your agreement will populate at the bottom of the screen, select **Revoke**.



Upon confirming, ETS will send an email to the requesting company advising that the request that has been revoked.



A message box will appear confirming you want to **Revoke** the **Authorization**. Select **Ok**. Once **Ok** has been selected, the task will be completed.

	Α	uthorization	
Туре:		×	Show Approved
Request Number:			Show Concur
Agreement:			Show Pending
Expiry Date:	From	То	Show Granted
			Show Rejected
			Show Revoked
	Search	Request Authorization	
est Authorization Type	Agreement/Well	Authorized Company	Expiry yyyy/mm/dd
4 Surrender Messa	ge from webpage	×	2017/06/02 Revo
	Are you sure you wa	ant to Revoke this Authorization?	
		OK Cancel	OK

Revoke only means the authorization can not be used again; however, it does not revoke previously authorized applications already submitted.



To confirm the agreement has been **Revoked**, on the **Agreement Management Authorization** screen, select **Show Revoked**. All **Revoked Authorizations** will populate at the bottom of the screen.

ENERGY			Authorization		
	Type: Request Number: Agreement: Expiry Date:	From	  	Show Approved Show Concur Show Pending Show Granted Show Rejected Show Revoked	1. Select Show Revoked
Account     Encryption     User Training		Sear	ch Request Authorization		



Company Rejected and Revoked Authorizations						
Request	Authorization Type	Status		Comment	Expiry yyyy/mm/dd	
<u>385524</u>	Surrender	Revoked		Tracey Mason 780 422 9108	2017/06/02	

#### Rejected and Revoked Authorizations

Request	equest Authorization Status		tus	Comment	Expiry yyyy/mm/dd
<u>385524</u>	Surrender	Revoked		Tracey Mason 780 422 9108	2017/06/02

Alberta

## **Authorization – Reject Authorization**

Follow the same process to select the Authorization to Concur, but select **No** in the Concurrence dropdown list.





Upon submission of the request, ETS will send an email to the requesting company advising that the request has been rejected.



# Resources

ETS Support and Online Learning provides access to relevant guides, courses and other information.

If you have questions, please contact <u>Energy.Rentals@gov.ab.ca</u> or the PNG Tenure Help Line at (780) 644-2300.



Congratulations!

You have completed the Agreement Management Authorization Online Training Course

To access **Courses, Guides** and **Forms** for all your ETS Business please see <u>ETS Support and Online Learning</u>.

If you have any comments or questions on this training course, please contact:

Crown Agreement Management Helpdesk: (780) 644-2300 Email inquires: <u>ENERGY.Rentals@gov.ab.ca</u>

Classification: Protected A