

Welcome!

Accessing the **Work in Progress** folder allows you to review, edit or withdraw and track bid request(s).

To the ETS – Change Bid Request Online Training Course



Revisions

| Date            | Revisions Type               | Page Number |
|-----------------|------------------------------|-------------|
| August 31, 2012 | Conversion                   | All         |
| April 2020      | Updated                      | All         |
| December 2020   | Update the ETS<br>login page | Various     |

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# Introduction



#### In this module, you will learn how to:

- Retrieve Bid Request
- Delete Bid Request
- Withdraw and Edit Bid Request
- Change and Re-Submit Bid for a Tie Bid
- View Bid Reports

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# **Bid Request Status**



Work In Progress status is assigned when you save a new request.

**Submitted** status is assigned when you submit the request.

**Client Cancelled** status is assigned when you cancel the request by using the Delete function and the Sale is NOT closed.

**Completed** status is assigned when the Sale is CLOSED.

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# **Retrieve Bid Request**

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### More Information (Pages 6 to 9)



- Request Number You can enter a Bid Request number or leave blank and all bid requests created within the start date and end date will be listed.
- **Status** You can limit your search by selecting a specific Status (i.e., Work In Progress, Submitted, Completed, Client Cancelled)
- Account This option shows ONLY to accounts with Coordinator role. The drop-down arrow is used to select an ACCOUNT in order to limit search results to requests that have the selected account as a viewer, submitter, creator, or contact. Leave blank to select all accounts.
- **Find** The Find button will execute the search based on the specified parameters. The search results are listed in descending order from the most recent updated Bid Request.

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## **Delete Request**

| Home                                       | Current Department Time<br>Original Bid Request |                    |                | Bidding Rules |  |
|--|---|--------------------|----------------|---------------|--|
| ontacte<br>equest Status<br>osting Request | Request Detail                                  | Parcel             | Roles          |               |  |
| d Request<br>Query by Map                  | Commenti  | bid by bonus       |                |               |  |
| O PNG                                      | Sale Date:                                      | Oct 29, 2008       |                |               |  |
| PNG and Oil Sands                          | Status:   | Work in Progress   |                |               |  |
| Public Offering                            | Calculate Bid By:                               | Bonus              | -              |               |  |
| Work in Progress                           | Created By:                                     | EA0508             | *              |               |  |
| ansfers                                    | Client Name (Bid Payor):                        | 100-3578 001 GEN   | E CONPANY INC. | )             |  |
| cryption                                   | Contact:  | Katie Rozak - (555 | ) 123-4567     | ~             |  |
| elp Manuals<br>nline Learning              | Contact Phone (Optional):                       |                    | (999) 999-9999 |               |  |
|  | 2000 C  |                    |                | 1 - C.C.      |  |

Only the creator of the bid request is allowed to delete the bid if the sale is not closed.

If the creator of the bid request is not available, the Coordinator can change the created by and the new creator can delete the bid.

Clicking on the **Delete** button will display a confirmation message. Upon acceptance, the system sets the status of the request to **Client Cancelled**. Once this is done, no editing or reinstatement is allowed on a cancelled bid request.

*Tip:* The DELETE button is only enabled while the request is in Work in Progress status. If the request has been submitted, you need to withdraw the request before you can delete it.

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## Withdraw & Edit Request

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#### More Information (Pages 12 to 19)

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| ETS Home                          | Original Bid Request      |                  |                   | Didding Kules |
|-----------------------------------|---------------------------|------------------|-------------------|---------------|
| Request Status<br>Posting Request | Request Detail            | Parcel           | Roles             |               |
| Bid Request                       | Commenti                  | bid by bonus     |                   |               |
| Oil Sands                         | Sale Date:                | Oct 29, 2008     |                   |               |
| C PNG and Oil Sands               | Status:                   | Submitted        |                   |               |
| Public Offering                   | Calculate Bid By:         | Bonue            | -                 |               |
| Work in Progress                  | Created By:               | EA0508           | ×                 |               |
| Transfers                         | Client Name (Bid Payor):  | 109-3578-001 G   | ENTE COMPANY INC. | }             |
| Encryption                        | Contact:                  | Katie Rozak - (5 | 55) 123-4567      | ~             |
| Help Manuals Online Learning      | Contact Phone (Optional): |                  | (999) 999-9999    |               |

Withdraw and Edit

**Bid Request 266249** 

Save

Close

After a bid is submitted to Alberta Energy, the Submit button changes to the Withdraw and Edit button. Changes can be made to a Submitted bid request by selecting the Withdraw and Edit button as long as the Sale is not closed. The status of the bid changes back to Work In Progress and the bid must be re-submitted to Alberta Energy prior to the close of the Sale.

Once submitted only the Created By, Contact and Contact Phone fields can be changed and saved without withdrawing the bid request.

Click on *More Information* to view how to withdraw and edit a bid request.

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Tie Bid

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> More Information (Pages 21 to 25)



If two or more companies submit the same bid value on a parcel and that value is the highest submitted bid, Alberta Energy will ask the companies to submit a new bid for the parcel. There will be a time limit given for the resubmission of the bid.

Click on *More Information* to view how to change and re-submit a tie bid.

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# **View Bid Reports**

|  |        |                         | Wo        | rk in Progre  | ess                    |                        |         |  |
|--|--------|-------------------------|-----------|---|------------------------|------------------------|---------|--|
| Type:<br>Start Date:   |        | Bid Request  2008/07/16 |           | Request Nun   | nber:                  |                        |         |  |
|  |        |                         |           | End Date: 200   |                        | 008/07/21              |         |  |
| Statu  | s:     |                         | *         | k.  |                        |                        |         |  |
| Account:   |        |                         | ~         |   |                        |                        |         |  |
|  |        |                         | [8        | nd Clos   | ie)                    | Last                   |         |  |
|  | Comm   | ent                     | Status    | Files   | Sale Date<br>YYYY/MM/D | Updated<br>VYYY/MM/DD  | Creator |  |
| 66249  | bid by | bonus                   | Submitted | Sum: Pdf<br>Defail PdfXmlCsv<br>TieBid  | 2008/10/29             | 2008/07/21<br>14:19:52 | EA0508  |  |
| And in case of the local division of the loc | 41     |                         |           | and the second se |                        |                        |         |  |

You can view, save, and/or print your bid request from the Work In Progress page under Bid Request folder. In the Files column, the bid request is available in summary and detail PDF, XML and CSV file formats.



# Resources

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

If you have questions, please contact for PNG: <u>Bidding.Energy@gov.ab.ca</u> or the Sales Helpdesk at (780)644-2300 or for Oil Sands: <u>OSTenure@gov.ab.ca</u>

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Congratulations!

You have completed the ETS – Change Bid Request Online Training Course

Please proceed to the subsequent modules detailing other functionality of the Bidding application.

If you have any comments or questions on this training module, please forward them to the following email address:

Bidding.Energy@gov.ab.ca