



To the ETS – Initiate MIM Bid Request Online Training Course

Your total bid includes the bonus, rent at \$3.50/ha or \$50.00 whichever is greater, and an agreement fee of \$625.00.

A bonus offer of less than \$10.00 per hectare for a brine-hosted minerals lease will not be considered.

Electronic Funds Transfer (EFT) is the only method of payment for bids.

In order for you to create bid requests, you MUST have a **Creator** role. Once a bid request is created, it can be submitted by someone who has been assigned the role of **Submitter**.

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## **Revisions**

Date	Revisions Type	Page Number
January 15, 2025	Initial	All

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#### Introduction



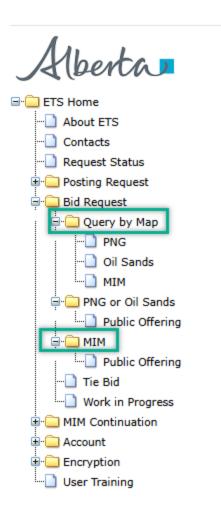
#### In this module, you will learn how to:

- · Query by Map
- Create a Bid Request
- Import Parcels into your Bid Request
- Calculate Bid amounts by Bonus or by Price per Hectare
- Submit a Bid Request

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## **Methods of Creating a Bid Request**



A **Bid Request** can be created using 2 methods.

#### 1. Query by Map

Allows you to select MIM parcels geographically using a Map and then load them into the Bid Request screen. The MIM, P&NG and OS parcels are on separate maps. Once the Bid Request screen has been populated with the graphically selected Parcel information, you will complete the Bid Request in the same manner as Method 2. To learn more about Query by Map please refer to the module Query by Map on Bidding Home page of online learning.

#### 2. Public Offering

Allows you to create a Bid Request by selecting a Sale Date and displaying all of the available parcels.

The Public Offering option allows users to create a bid request for the MIM rights for a specific sale date. Users must fill in the information on the Bid Request screen and then submit the request to Alberta Energy and Minerals

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#### **Bid Request Screen**

Bid Request		
Current Department Time	Bidding Rules	
Request Detail	Parcel Roles	
Comment:		
Sale Date:	2024/12/18 V YYYY/MM/DD	
Status:	Work in Progress	
Calculate Bid By:		
Created By:	EA0572	
Client Name (Bid Payor):	V	
Contact:	- (999) 999-9999	
Contact Phone (Optional):	(999) 999-9999	
Surface	Access Restrictions should be checked before making a bid.  Save Close	

**Tip**: Use the Current Department Time link to validate the time. Bids will be closed according to this clock on Sale Days.

*Tip*: Use the Bidding Rules link to review current bidding rules.

*Tip*: The next available sale date is displayed. Use the drop-down arrow to change the Sale Date. You must create separate Bid Requests for each sale.

*Tip*: For more information on the bidding functionality and roles please see the <u>Bidding Overview</u> tutorial.

- Request Detail this screen contains the information required for you to begin preparing your bid
- b. Parcel this screen displays the available parcels that you can bid on for a selected sale date. This screen can be populated using the Query by Map function, or Load from File function
- c. Roles this screen allows you to identify who the viewers and submitters are for the Bids.

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#### **Request Detail Tab**

	Bid Request	
current Department Time		Bidding Rules
Request Detail	Parcel Roles	
Comment:		$\supset$
Sale Date:	2024/12/18 YYYY/MM/DD	
Status:	Work in Progress	
Calculate Bid By:		
Created By:	EA0572	
Client Name (Bid Payor):		•
Contact:	(999) 999-9999	~
Contact Phone (Optional):	(999) 999-9999	
Surfac	Access Restrictions should be checked before making a bid.  Save Close	

*Tip:* You cannot save a request before choosing Parcels.

The **Request Detail** screen allows you to add or change information on the bid request.

- Sale Date The Default Sale Date is the next available sale. Ensure that you have selected the correct sale date prior to preparing your bids.
- Status The initial status of the request is Work In Progress.
- Calculate Bid by You can choose to calculate your bid by BONUS or PRICE PER HECTARE. This field is mandatory.
- Created By is defaulted to the user who is logged in. Only the individual with a Coordinator role can use the drop-down arrow to select a different CREATOR.
- The Client Name or Bid Payor is the company that will be debited for the total amount of all of the successful bids. You MUST be set up with an Electronic Funds Transfer account by the Sales area. This field is mandatory.
- Right Arrow Clicking on the right arrow will take you to the next tab
  or, you can click on the PARCEL tab at top
- **Contact** Use the drop-down arrow to select the Contact person or keep the default. This is the person the DOE contacts with any emails or phone calls. To pick another person as the contact, you must add this person to the bid request as a Viewer first.

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#### **Bid by Bonus or Price Per Hectare**

The Bidding system will assist you in calculating your bid amount. You can choose to calculate your bid by BONUS or PRICE PER HECTARE.

If you choose to **Calculate by Bonus**, the system will enter your specified Bonus value against each Parcel selected, and will calculate the Price per Hectare for each of the Parcels selected, dividing the Bonus by the Parcel hectares.

If you choose to **Calculate by Price per Hectare**, the system will automatically calculate the Bonus amount for all of the Parcels selected, using the value you insert times the Parcel hectares.

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#### **Parcel Tab**



The **Parcel** screen allows you to add/delete parcels and to enter corresponding client information. There are 2 methods of manually adding Parcels to your Bid Request.

Method 1 - Select Parcel Method 2 - Load from File

Clicking on the **Add Parcel** button will display the Add Parcel Screen.

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#### Add Parcel using Select Parcel Method

Sale Date : Jan 08, 2025 <u>Bid</u>		<u>ding Rules</u>			
Options:					
$\bigcirc$ Load From File:	Choose File No file chosen				
Select Parcel					
Default Price/Ha:	Apply De	efault Value			
All Parcel	Ha Price/Ha	Bonus Mineral Type	Agreement Type	Metis	Â
☐ M0004	768.0000	MET & IND	BRINE- HOSTED MINERALS LEASE	No	
☐ M0005	768.0000	MET & IND	BRINE- HOSTED MINERALS LEASE	No	
			BRINE-		

Using the **Select Parcel** method will load all of the parcels available for the Sale you selected. The parcels will be displayed in numerical sequence.

Using the Query by Map option allows you to select parcels geographically using a Map. The parcels selected can be loaded into the Bid Request Parcel screen.

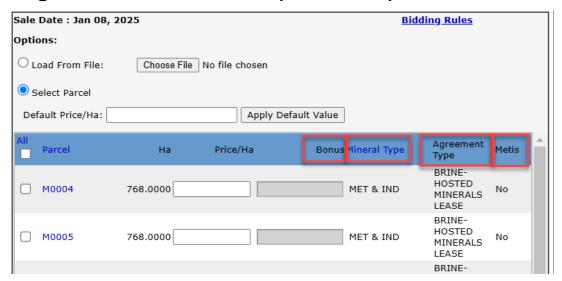
- **Default Bonus** Based on the calculation type selected on the Request Detail screen, this button will be Default Bonus or Default Price/Ha.
- Apply Default Value After you enter your Bonus or Price/Ha value, clicking the Apply Default Value button will populate all the parcels selected with the specified Bonus amount or Price/Ha you entered. You can amend the Bonus amount or Price/Ha for individual parcels.
- Check All Clicking on this box will select ALL the parcels in the sale.
- **Select Parcel** Clicking on the box beside the Parcel number will select that parcel.
- Parcel Parcel number as it appears in the Public Offering Notice. Clicking on the Parcel column header will sort it in ascending/descending order.
- Ha Number of hectares in the parcel
- Price/Ha If you choose Calculate Bid by Price/Ha in the request detail screen, you must enter the money value you are bidding per hectare (\$ x ha = Bonus) for each parcel you selected.

  Continued.......

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#### **Add Parcel using Select Parcel Method (Continued)**



- **Bonus** If you choose Calculate Bid by Bonus in the request detail screen, you must enter the total bid amount.
- Mineral Type Mineral type of the parcel (PNG or OS). You can change the order of parcels to OS Mineral Type first by clicking on the Mineral Type column header.
- Agreement type Agreement type of the parcel (Lease, Licence or Permit).
- Metis The Yes/No flag indicates if the parcel is a Metis parcel. Please note that Metis
  parcels are not available for Met & Ind mineral types.
- Parcel Number Clicking on a parcel number will show the land and rights associated with the parcel.

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#### Add Parcel using Load from File Method



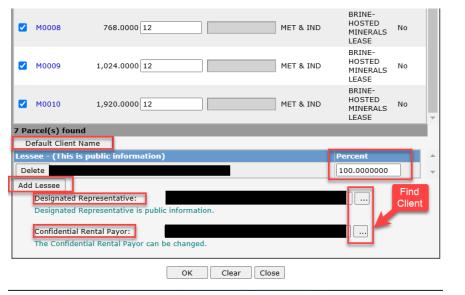
Use the **Load from File** method to load your parcels, monetary values and client information from an XML or CSV file that was created using your in-house system.

- Load from File Select the Load from File button.
- Browse Click Browse to find the file containing the XML or CSV file you have created.
- Select Select the file
- OK Clicking on the OK button will populate the Parcel screen with the information from the XML or CSV file.

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#### Add Parcel - Client Information



In the Add Parcel screen, you must add the client information (Lessee(s), Designated Representative, and Confidential Rental Payor) for the parcels you are bidding on. Once you have filled in the information, click OK.

- Default Client Name Clicking on the Default Client Name button will default your client name as the Lessee, Designated Representative and Confidential Rental Payor for the parcel(s).
- Lessee The Lessee is the client who has an interest in the lease, licence or permit.
- Percent Each Lessee's interest must be shown as a percentage and the total of all the percentages must be 100 percent.
- Add Lessee Use the Add Lessee button to select the lessee, or add additional lessees from the FIND CLIENT screen.
- Designated Representative is the client designated as the representative
  of the lease, licence or permit. This client will receive all correspondence
  from Alberta Energy relating to the agreement.
- Find If your company is not the representative of the lease, licence, or permit, use the ellipsis button to select a different Designated Representative from the FIND CLIENT screen.
- The Confidential Rental Payor defaults to the client creating the bid request (bid payor).
- Find If your company is not responsible for future rent payments, use the ellipsis button to select a different rent payor from the FIND CLIENT screen.
- OK Clicking on the OK button will validate the information, and enter it on the Parcel Tab.
- Clear button resets all the values in the screen.

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#### **Change Parcel Information Prior to Submitting**



- Information Clicking on the "+" sign will show the land and rights and client information associated with the parcel.
- **Delete** Delete the bid request
- Save Clicking on the Save button will save the changes.
- Close Clicking on the Close button will close the screen and all the changes will be lost.

Once the **Parcel** tab is populated, the Bonus or Price/Ha of a parcel and the client information can be modified by clicking on the following buttons:

**Re-Calculate** button re-calculates the Bonus, Price/Ha, and Bid Amount based on the changes made.

**Add Parcel** button allows you to add more parcels to your bid request.

**Copy Parcel** button allows you to copy the Bonus or Price/Ha and/or client information from one parcel to other parcels on the same bid request.

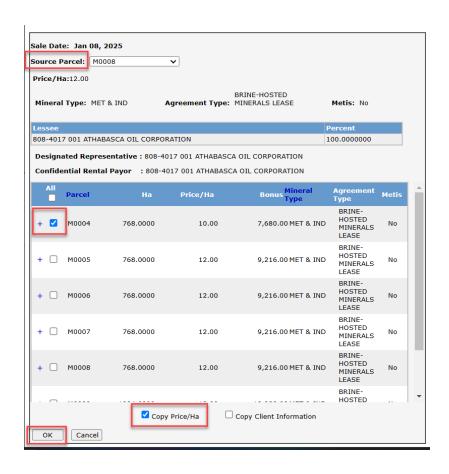
**Delete Selected Parcel(s)** button allows you to delete parcels from your bid request.

- Fee Mineral Agreement Issuance Fee
- Rent Annual Rent
- **Bid amount** includes the Bonus Amount, the Agreement Fee and the Rent for the first year of the agreement.
- Delete Click the Delete checkbox to select the Parcel you want to delete. Clicking on the Delete Selected Parcel(s) button will delete the selected parcel(s).

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#### **Change Parcel Information Prior to Submitting (Continued)**



**Tip:** Always save your bid request before performing the Copy Parcel operation to make sure you are copying the right information.

- **Source Parcel** Source Parcel can be chosen from the list of parcels selected for the bid request.
- **Select** Select the box beside the parcel number that you want to copy to.
- Copy Bonus Select the Copy Bonus box to copy the bonus. If bid is created by Price/Ha, this box will be called Copy Price/Ha.
- **Copy Client Information** Select the Copy Client Information box to copy the client information.
- OK Click OK to perform the copy operation. Clicking CANCEL will cancel the copy operation.

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#### **Save Request**



Delete

Save

Close

When you **save** the bid request, any error or warning messages will be displayed at the top of the screen. If there are no errors, the system will assign a **Bid Request Number** and provide a link to the **Original Bid Request**.

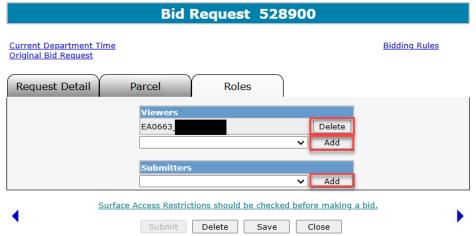
**Tip**: Saving a bid request does not submit it to Alberta Energy.

- A Bid Request Number is assigned when the request is saved.
- Original Bid Request Clicking on the Original Bid Request link will open your bid document.
- **Right Arrow** To move to the Roles tab, you can click on the right arrow or click on the Roles tab at the top of the screen.
- **Submit** If the Submit button is greyed out, you must add a Submitter in the Roles screen to submit the bid.
- Delete Clicking on the Delete button will display a confirmation message. Upon acceptance, the status of the request will be changed to Client Cancelled. Client Cancelled bid requests cannot be edited.
- Close Clicking on the Close button will close the screen and all the changes will be lost.

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#### **Roles Tab**



The **Roles** screen is used to define who can view and submit your request. If you have already added a viewer and/or submitter by accessing the Account folder, Preferences page, Bid Request Preferences, the Viewer and Submitter box will be filled in. You can add or delete Viewers and Submitters for each bid request.

*Tip:* If the submitter and the creator of the bid request are different users, it is the responsibility of the creator to advise the submitter that the request is now available for submission to the Department.

- Add Adding a Viewer to the bid request is optional. Use the drop-down arrow to find and select users who can view requests.
- Submitters This submitter was set up in the ETS
   Account Bid Request Preference and can submit the bid.
- Delete Use the Delete button to remove a Viewer or Submitter from your bid request.
- Add Submitter If the Submit button is greyed out, you
  must add a Submitter to submit your bid request. Use
  the drop-down arrow to find and select users who can
  submit requests.

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#### **Submit Request – Bid by Bonus**

If you do not have a submitter role, the user selected as the Submitter for this request must log onto the system and submit the request.

Clicking on the SUBMIT button will display a confirmation message. Upon acceptance, the system validates the request and if no errors are encountered, the request will be submitted to Alberta Energy. The status of your request will change to "Submitted" and the SUBMIT button changes to WITHDRAW AND EDIT.

*Tip:* Once submitted only the Contact Name, Contact Phone, or Created By fields can be changed and saved without withdrawing the request.

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#### Bid Request 528900

Current Department Time Original Bid Request

Select Original Bid Request link cked before making a bid.

Selecting the original bid request link will open up the original bid request details

#### Request submitted successfully to Department

**Total Number of Parcels:** 

7

**Total Bid Amount:** 

\$ 109,527.00 (CAD)

One hundred nine thousand five hundre

OK

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ELECTRONIC TRANSFER SYSTEM Original Bid Request (Detail) 528900

Sale Date: Jan 08, 2025

Status: Submitted

Submission Date: Jan 07, 2025 12:15:25 PM Submitted By: EA0663

Creation Date: Jan 07, 2025 11:58:44 AM

Bidding Rules

EA0663 Created By:

Jan 07. 2025 12:15:26 PM Last Updated Date:

Client Name (Payor): Contact:

Contact Phone:

Contact Phone (Optional):

Contact Email: Comment:

Total MET & IND Bid Request Amount:

\$ 109,527.00

One hundred nine thousand five hundred twenty seven dollars

MET & IND BRINE-HOSTED MINERALS LEASE(S)

Hectares Price/Ha 2,688.00 MOO04 No 768.0000 12.00 9,216.00 625 12,529.00

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## **Bid Request 528900**

<u>Current Department Time</u> <u>Original Bid Request</u> **Bidding Rules** 

Surface Access Restrictions should be checked before making a bid.

nent	
dollars	
Click OK	
	dollars

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#### Bid Request 528900 **Current Department Time Bidding Rules** Original Bid Request Request Detail Parcel Roles Parcel 768.0000 12.00 2,688.00 + M0004 9,216.00 625 12,529.00 768.0000 12.00 9,216.00 625 2,688.00 12,529.00 + M0005 + M0006 12.529.00 768,0000 12.00 9.216.00 625 2,688,00 + M0007 768.0000 12.00 9,216.00 625 2,688.00 12,529.00 + M0008 768.0000 12.00 9,216.00 625 2,688.00 12,529.00 + M0009 1,024,0000 12.00 12,288.00 625 3,584.00 16,497.00 + M0010 1,920.0000 12.00 23,040.00 625 6,720.00 30,385.00 Total Bid : \$ 109,527.00 (CAD) One hundred nine thousand five hundred twenty seven dollars Add Parcel | Copy Parcel | Delete Selected Parcel(s) Please save this Bid Request before choosing Copy Parcel Surface Access Restrictions should be checked before making a bid. Withdraw and Edit Save

etsaccp.energy.gov.ab.ca says

The status of your request will be changed to Work in Progress from Submitted. The Department will not process this request due to the status change. Please edit your request and click on the Submit button to ensure the Department receives your updated Bid.

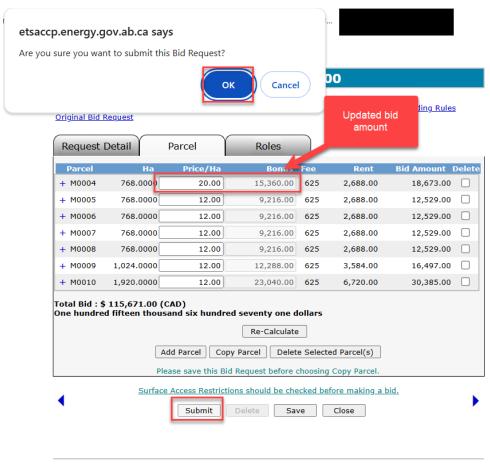
- Withdraw and Edit This button can be clicked to withdraw the bid and edit the bid.
- You are only able to withdraw and edit your bid request until the sale closing time (12:00pm on the sale date).

 This error will come up and you can click OK if you wish to proceed or Cancel if you wish to cancel.

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- The Bid Request is put back into work in progress and you can make any changes required
- You can delete a parcel, change the bid amount or update the request detail or roles screens.
- After making your changes submit the bid request again.

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#### Bid Request 528900

Current Department Time Original Bid Request

**Bidding Rules** 

Surface Access Restrictions should be checked before making a bid.

A new Original Bid Request document will be generated with the new submission date and time and bid corrections.

Request submitted successfully to Department		
Total Number of Parcels :		
7		
Total Bid Amount :		
\$ 115,671.00 (CAD)		
One hundred fifteen thousand six hundred seventy one dolla  OK		ELECTRONIC TRANSFER SYSTEM Original Bid Request (Detail) 528900
	,	Sale Date: Jan 08, 2025
Feedback Help Copyright © 1999 Government of Albe	Status:	Submitted
reconsists from copyright @ 1999 dovernment of Albe	Submission Date:	Jan 07, 2025 12:59:57 PM
	Submitted By: Creation Date:	EA0663 Jan 07, 2025 11:58:44 AM
	Created By:	EA0663
	Last Updated Date:	Jan 07, 2025 12:59:58 PM
	Client Name (Payor):	
	Contact:	
	Contact Phone:	
	Contact Phone (Optional):	
	Contact Email: Comment:	
	Total MET & IND Bid Request	Amount: \$ 115.671.00
	Total mil a ind bid kequest	One hundred fifteen thousand six h

ed fifteen thousand six hundred seventy one dollars MET & IND BRINE-HOSTED MINERALS LEASE(S) Parcel Metis Price/Ha Bonus Bid Amount 20.00 768.0000 15,360.00 2,688.00 18,673.00 MOOO4 No

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## Resources

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

If you have questions, please contact <a href="mailto:CMD.Energy@gov.ab.ca">CMD.Energy@gov.ab.ca</a>

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# Congratulations!

You have completed the ETS – Initiate MIM 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:

CMD.Energy@gov.ab.ca



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