

Welcome!

To the ETS – Search Agreements Online Training Course

The **Search Agreements** functionality in Transfers enables you to find existing agreements pertaining to registered interests.

Using the search results, you can select the agreements and request for a transfer of ownership to another party.

Revisions

Date	Revisions Type	Page Number
August 31, 2012	Conversion	All
April 2020	Updates	All
November 2022	Update	Includes Geothermal Agreements



In this module, you will learn how to:

- Search by Agreement Type and Number
- Search by Agreement Type and Number using your own Input File
- Search by Client ID (10-digit)
- Find Client ID (by name or 7-digit client ID)
- Display Agreements Found

Search Agreements Options

You can search agreements using the following options:

- Agreement Type and Number
- Client ID

You may search by one or all of the above options. Selection of multiple options will refine your search criteria.

In addition, you can also import your own file that contains the list of agreements you want to search on.

Agreement numbers include PNG, Oil Sands, Coal and Mineral Development as well as Geothermal agreements.

Search Agreements by Agreement Type and Number

[More Information](#)
(Pages 6 to 11)

Type	Description
001	PNG Lease
002	NG Lease
003	Petroleum Lease
004	5 Yr Plains PNG Lease
005	5 Yr Northern PNG Lease

Use this option when you know the Agreement Type and Number. You may enter only the agreement number and leave the 3 digit agreement type blank. If there is more than one agreement type with that number, the search results will display all the activity types matching that number. To obtain an exact match, you need to enter both the agreement type and the agreement number.

Clicking on the **More Agreements** link will display 10 more rows of agreement type and number boxes. You may enter up to 100 agreements in the Search by Agreement option.

The **Agreement Type Code Table** link shows a complete listing of all agreement type codes.

Click on *More Information* to view how to **search by agreement type and number**.

Search Agreements using Input File

[More Information](#)
(Pages 13 to 16)

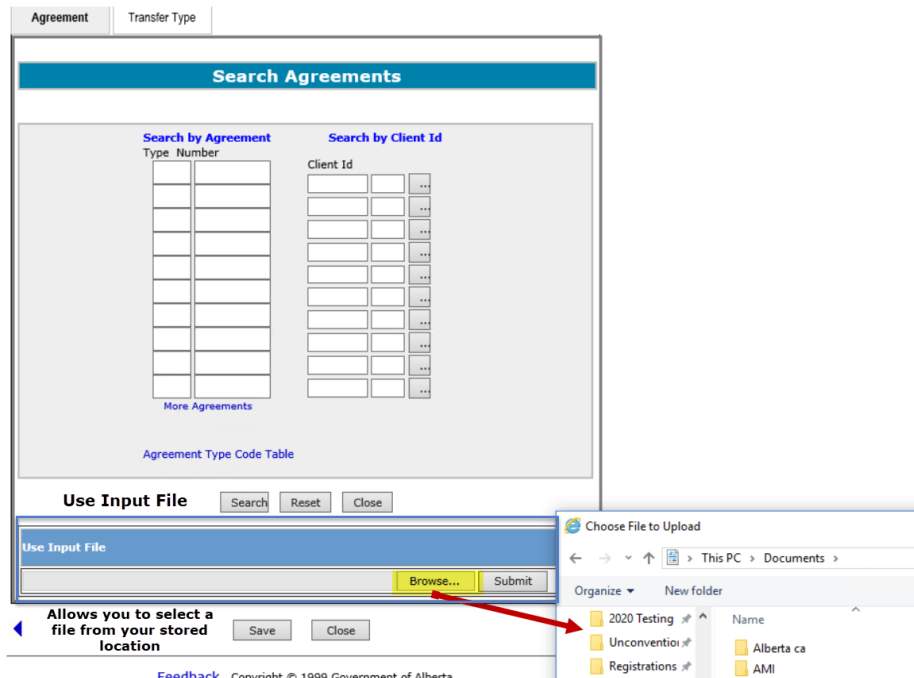
To help you save data entry time, you can import your own file that contains your list of agreements to be transferred. The list **MUST** follow a pre-defined format as follows:

- The first line is called the header line and it must be **TYPE,NUMBER**.
- The successive lines after the header line must follow the format: 3 digit agreement type, a comma, and agreement number.
- Example:

```
TYPE,NUMBER
004,0495070093
071,7196020386
001,123456
```

The input file should be a text file (.TXT) and can contain either lowercase or uppercase letters.

Click on *More Information* to view how to **search agreements using an input file**.



TIP: Saving your file in a text format using **Notepad** will create the proper file format.

Search Agreements by Client ID

[More Information](#)
(Pages 18 to 20)

Use this option when you know the 10-digit Client ID. The Client ID consists of the 7 digit Client ID and the 3 digit address code.
i.e. 8029377-001

8029377 is the 7 digit client Id for Company A
001 is the 3 digit address code for Company A

Find Client: Use this option if you do not know the Client ID. This takes you to the Find Client screen, which provides you with a field to enter the client's name.

Click on *More Information* to view how to **search by client ID**.

Find Client

ClientName **Use Surname, First Name for Individuals**

Client ID	Client Name	ETS Acct	Address
-----------	-------------	----------	---------

Search Agreements by Client ID using Find Client Screen

[More Information](#)
(Pages 22 to 26)

Find by Client Name

Find Client

ClientName Free% Find (Use Surname, First name for individuals)

Client ID	Client Name	ETS Acct	Address
Select Blank		Close	

The Find Client screen allows a search by name or by the first 7 digits of the client ID, if you do not know the client's address code.

Find by Client Name. This option allows you to find the client ID by specifying a client name. You can enter the first 4 characters of the client's name to begin the search.

Find by Client ID. This option allows you to find the full client ID (10-digit) using the first 7 digits of the client ID in the search.

Click on *More Information* to view how to **find client**.

Find by Client ID

Find Client

ClientId 8044361 Find (Use Surname, First name for individuals)

Client ID	Client Name	ETS Acct	Address
Select Blank		Close	

Tip: Click the dropdown arrow to select between Client Name and Client ID.

Search Agreements by Client ID using Find Client Screen (Continued)

The Find Client Results screen will only display **ACTIVE** clients.

You need to select the client from the Find Client Results screen to populate the Search by Client ID field in the **Search Agreements** window. In case a client has multiple client IDs, it is important that you select **ALL** of the client IDs to ensure an accurate search is obtained.



The screenshot shows the 'Find Client' interface. At the top, there is a search bar with 'Client Name' selected and 'ABC Co' entered. A 'Find' button is next to it, with a note '(Use 'Surname, First Name' for individuals)'. Below this is a table with the following columns: Client ID, Client Name, ETS Acct, and Address. A single row is displayed with the following data: 809-2681 001, ABC COMPANY, Yes, 25 CARDIFF LANE STRATFORD PE C1B 1L1. A 'Select' link is visible at the end of the row. At the bottom of the table, there are 'Select Blank' and 'Close' buttons.

Client ID	Client Name	ETS Acct	Address
809-2681 001	ABC COMPANY	Yes	25 CARDIFF LANE STRATFORD PE C1B 1L1

- **Client ID** - The Client ID column displays a list of client IDs that match your selection criteria.
- **Client Name** - The Client Name column displays the corresponding client's name on our Alberta Mineral Information System
- **ETS Acct** - The ETS Acct column indicates if the client has an ETS account. If the client you select does NOT have an ETS account, inform the specific client to apply for an ETS Account.
- **Address** - The Address column displays the Official Service Address according to the Records of Alberta Energy for each client.
- **Select** - Use the Select link to select the client involved.

Search Results

Agreements Found				
<input type="checkbox"/>	Agreement	Designated Representative	Pending	Land
<input checked="" type="checkbox"/>	054 5407090783	ABC COMPANY	NO	5-24-091
<input checked="" type="checkbox"/>	054 5407090784	ABC COMPANY	NO	5-24-091
		Participant	ETS Acct	Percent
		ABC COMPANY	Yes	100.0000000

2 Agreements found

OK Cancel

The Agreements Found screen will display all the agreements found in ascending Agreement Type and Agreement Number order.

The **Pending** column indicates if there is a transfer pending for the agreement displayed. A Transferor(s) undivided interest is locked once the transfer is in Pending status. If there is more than one participant in an agreement, transfers can be prepared involving the remaining participants.

If individual transfers are prepared for each participant in an agreement, each participant's interest will be locked in Pending status.

- **Select All** - Putting a check mark in the box at the top of the screen will select ALL agreements.
- **Agreement Number** - To display the Agreement information, click on the agreement number.
- **Show Details** - Clicking on the '+' will show the participant details.
- **Hide Details** - Clicking on the '-' will hide the participant details.
- **Participant** - The participant details include the participant name, whether or not that participant holds an ETS account, and percentage of interest held.

Resources

[ETS Support and Online Learning](#) provides access to relevant guides, course and other information

If you have questions, please contact Transfers.Energy@gov.ab.ca or the Transfer Helpdesk at (780)644-2300

Congratulations!

**You have completed the ETS – Search Agreements
Online Training Course**

Please proceed to Initiate a Transfer module detailing other
functionality of Transfers.

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

Transfers.Energy@gov.ab.ca

