

# Welcome!

## To the ETS – Create Client Account & Maintenance Online Training Course

- The Site Administrator(s) for a company are responsible for creating and maintaining Client User Accounts. The Site Administrator(s) assigns levels of access to ETS based on the role an individual has within the company.
- Individual accounts (called Client User Account) are subsets of the Site Administrator Account(s). Each Client User Account is given access to Form Types (Type of Business you will be submitting) and assigned a Role that defines the required functionality.
- Once the Client User Account is created, the individual can logon to the secure ETS web site using this new Client User Account login Id and password.
  - This new Client User Account must be assigned a role which defines the functionality that this account can access while in ETS. This is designed to allow organizations to delegate specific Business functionality to certain accounts for different forms in order to maximize the visibility of secure information to those authorized to view that information.

## Revision Page

**Revisions Table**

Date	Revisions Type	Page Number
January 14, 2016	Initial Creation	All
August 2, 2019	Update	All

## Introduction

### In this module, you will learn:


- ETS Login Steps
- ETS Home Page
- Create Client Account
- Client Roles Overview
- Assign Client Roles – Overview
- Assign Client Roles and Form Types
- Assign Client Account to a Group Coordinator
- Remove Client Role from an Assign Group
- Remove a Form Type from Client Account
- Edit Client Account
  - Edit Client Account – Reset Password
  - Edit Client Account – Delete Client Account
- Account Description
- User Profile Report

### Course Pre-requisites:

- ETS Account Setup and Preferences (For Site Administrators)
- Password Reset

## ETS Login Steps

**Electronic Transfer System**



User Name:

Password:

Save my user name

[Forgot Password/Reset Password](#)

**1.** Enter your Assigned ETS Access ID

**2.** Enter your Password

**3.** Select the Login Button

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**Support:** Report problems or questions to [Crown Land Data](#) at (780) 422-1395

ETS may be unavailable due to system maintenance on Friday after 4:30 p.m. until 6:00 p.m. Sunday.

If you require support with existing ETS accounts or setting up a new account, please contact [ETSAccountSetup@gov.ab.ca](mailto:ETSAccountSetup@gov.ab.ca).

If you require technical support with ETS, please contact [ETS@gov.ab.ca](mailto:ETS@gov.ab.ca).


Note that technical support will only be available during business hours, so it is important to ensure the data is submitted within the business hours timeframe: 8:15 AM - 4:30 PM Monday to Friday.

**Bulletin**

To contact PNG Sales with any issues please call their **NEW** help-desk number **780 644-2300**

## ETS Home Page

After entering your ID and Password you will be taken to the **ETS Home Page**. On the left-hand side of the page will be the menu tree displaying all the **Form Types** assigned to your account. On the right-hand side of the page the logged in **User information** is displayed with the **User's password Expiry Date**. Below this data is the **Bulletin** which displays all important updates.

- 
- ETS Home
    - About ETS
    - Contacts
    - Request Status
    - Subscriptions
    - Land Searches
    - PNG Continuation
    - Agreement Management
    - Crown Mineral Activity
    - Posting Request
    - Bid Request
    - Unit Agreement Exhibit A
    - Transfers
    - Freehold Mineral Tax
    - Correspondence
    - Oil Sands
    - Encumbrance
    - Mineral Direct Purchase
    - Mineral Royalty Forms
    - Submit Forms
    - Input Forms
    - Offset
    - Account
    - Encryption
    - Reports
    - Administration
    - User Training

### Electronic Transfer System

**Logged in User:**

EA0001

Your password will expire on May 17, 2020.

ETS may be unavailable due to system maintenance on Friday after 4:30 p.m. until 6:00 p.m. Sunday.

#### Bulletin

#### For Met and Ind Mineral Direct Purchase ONLY:

Any application requesting lands on a 30 day reserved area, are not eligible for request until after the 30 day date has expired.

Request would be deemed valid at 12:01:00 a.m. on the 31st day.

Last Update Feb. 21, 2019 at 03:30 PM

#### Map Displaying all Caribou Ranges in Alberta

Further to Information Letter 2016-34 Alberta Energy has prepared a map outlining all caribou ranges in Alberta. Refer to [http://www.energy.alberta.ca/AU/Services/Documents/CaribouRange\\_ForExternal.pdf](http://www.energy.alberta.ca/AU/Services/Documents/CaribouRange_ForExternal.pdf)

Last Update November 16, 2018 at 11:30 AM

#### Interim Posting Restriction in all Caribou Ranges

Alberta Energy is committed in establishing Alberta as Canada's leader in permanent protection of caribou ranges. Effective immediately, an interim restriction has been placed on the sale of mineral rights within all caribou ranges in Alberta. This restriction applies to petroleum and natural gas, oil sands, coal and metallic and industrial mineral rights. The restriction is expected to remain in place until stringent operating practices have been defined, through directives or changes to the Enhanced Approval Process Integrated Standards and Guidelines, or upon approval of the appropriate range plan. Alberta Energy intends to resume

## Create Client Account

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Subscriptions
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Freehold Mineral Tax
  - Correspondence
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Mineral Royalty Forms
  - Submit Forms
  - Input Forms
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts**
      - Create Client**
      - Assign Roles
      - Edit Client
      - User Profile Report
  - Encryption
  - Reports
  - Administration
    - User Training

1. Select Account

2. Select Client Accounts

3. Select Create Client

### Create Client Account

**\*Client Account Name (maximum length is 13 characters):**

**\*Password (12-127 chars):**  **\*Repeat Password:**

---

**\*First Name:**

**\*Last Name:**

**\*Phone Number (999) 999-9999:**  **Fax Number (999) 999-9999:**

**\*Email Address:**

**\*Repeat Email Address:**

\* - denotes Required Field

Only a Site Administrator can create a **Client Account**. The following **Client Account** detail information is required:

- Unique Client Account Name (maximum of 13 characters)
- Password – See **NOTE** below.
- First Name (maximum of 20 characters)
- Last Name (maximum of 40 characters)
- Phone Number (maximum of 14 characters)
- Fax Number, optional (maximum of 14 characters)
- Email Address (maximum of 60 characters)

**Submit:** This button will validate the information entered.

**Reset:** This button will clear all the fields on the form.



**NOTE:** Review the Password Reset Module located on the Online Learning website at <https://training.energy.gov.ab.ca/Pages/Accounts%20In%20ETS.aspx> for the Password prerequisites.

Continued onto next page



## Create Client Account - Continued

### Create Client Account

- The Client Account Name contains an invalid character(s). The Client Account Names must be between 2 and 13 characters and may not contain special characters except hyphen.
- The passwords do not match

\*

**\*Client Account Name (maximum length is 13 characters):**

**\*Password (12-127 chars):**  **\*Repeat Password:**

---

**\*First Name:**

**\*Last Name:**

**\*Phone Number (999) 999-9999:**  **Fax Number (999) 999-9999:**


**\*Email Address:**

**\*Repeat Email Address:**

**\* - denotes Required Field**

Once **Submit** has been selected, ETS will validate the information provided on the screen.

If any error(s) are detected during the validation, a message will appear at the top of the page.

A  will be displayed beside the incorrect information relating to the message(s) for correction.

Once the correction(s) have been made select the **Submit** button.

## Create Client Account - Continued


Create Client Account

Confirm Client Account Creation

**Client Account Name:** EA0331\_JOHNS

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Contact Information


<b>Name:</b>	John Smith
<b>Phone Number:</b>	(780) 555-1111 
<b>Fax Number:</b>	
<b>Email Address:</b>	johnsmith@company.net

After selecting **Submit** on the previous page, ETS will validate the information again and the **Create Client Account** will populate if no errors occur.

Review the information on the screen for accuracy and select **Create Account** if the information is correct. If changes are required, select **Cancel** and the system will take you back to the **Create Client Account** input screen.



**NOTE:** The **Client Account Name** entered on the input screen has now been created with the prefix of the Company's ETS Account Number. Example: ETS Account Number **EA0331** and Client Account Name entered into the **Create Client Account** Input Screen, becomes the new **Client Account Name:** **EA0331\_JOHNS**

Continued onto next page 



## Create Client Account - Continued

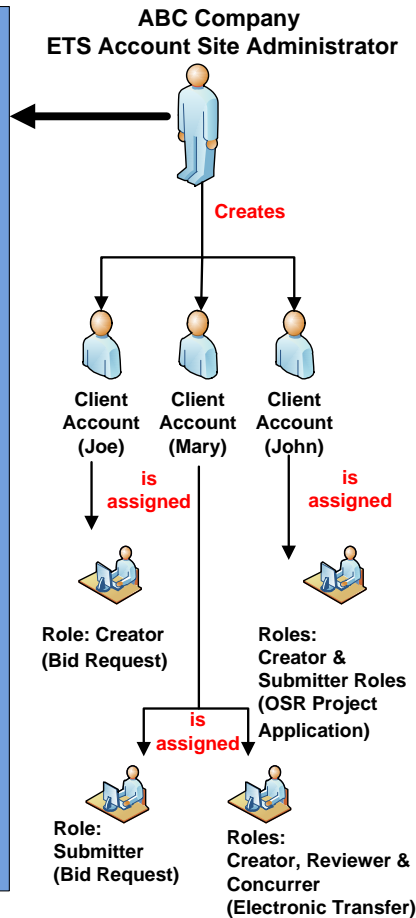
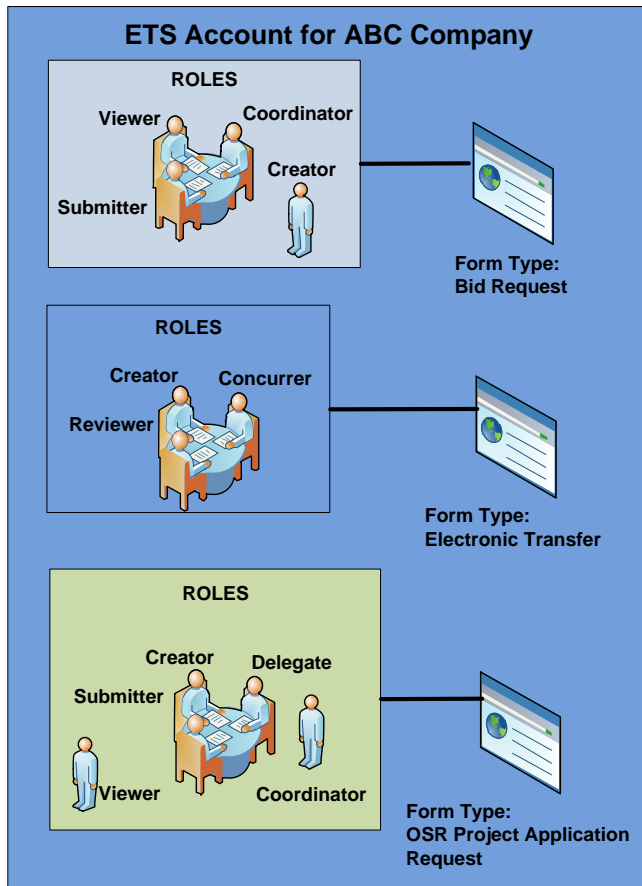
**Create Client Account**

**Client Account Created.**

The client account has been created.  
You must now assign roles to this client using the 'Assign Roles' menu option.

After selecting **Create Account** the above screen populates confirming the **Client Account** has been created.

## Client Roles Overview



The security model used within the ETS web site is enforced by the **Roles** that are assigned to a **Client Account** for a specific **Form Type**. The Site Administrator(s) assigns the roles within the organization to control **Client Account** functionality.

In order for a **Client Account** to access a functionality within the ETS web site, the Site Administrator(s) must first assign the corresponding **Role(s)** to the **Client Account**. **Roles** will vary according to the **Form Type**.

The **Form Types** that are made available to the Site Administrator Account(s) can be changed by submitting a new ETS Account Setup Change Form.



**NOTE:** The ETS Account Setup/Change Form can be downloaded from the ETS Support and Online Learning website: <https://training.energy.gov.ab.ca/Pages/Accounts%20In%20ETS.aspx> under the menu section, Accounts (ETS) Administration.



## Client Roles Overview - Continued

A Client ID represents the Department of Energy ID that will be used when submitting requests. By default, the **Client Account** will have access to all Client IDs that have been associated with the Site Administrator Account. However, individual Client IDs can be added to the **Client Account**.

Client ID(s) must be assigned to the selected **Client Account** when adding Roles for the following Form Types:

- Bid Request
- Debit Remittance
- Electronic Assignment
- Electronic Transfer
- OASIS - OSR Project Application Request
- PNG Continuation Documents
- PNG Continuation Authorization
- PNG Continuation-Continuation
- PNG Continuation-Expiry Reinstatements
- PNG Continuation-Third Party
- PNG Continuation-Validation
- Posting Request

To add a Client ID to an existing **Client Account**, please contact Crown Land Data at: (780) 644-2300 or email inquiries: [crownlanddatasupport@gov.ab.ca](mailto:crownlanddatasupport@gov.ab.ca)

## Assign Client Roles - Overview

ETS Home

- About ETS
- Contacts
- Request Status
- Land Searches
- PNG Continuation
- Agreement Management
- Crown Mineral Activity
- Posting Request
- Bid Request
- Unit Agreement Exhibit A
- Transfers
- Assignments
- Freehold Mineral Tax
- Oil Sands
- Encumbrance
- Mineral Direct Purchase
- Offset
- Account
  - 1. Select Account
  - Preferences
  - Description
  - Change Password
  - Security Questions
  - Client Accounts
    - 2. Select Client Accounts
    - Create Client
    - 3. Select Assign Roles
    - Assign Roles
    - Edit Client
    - User Profile Report
- Encryption
- Reports
- User Training

### Assign Client Roles

**Select Client Account:** EA0331\_JOHNS -- <johnsmith@company.net>

**Select Form Type:** Bid Request

**Select Roles:**

Role	Description	
<input type="checkbox"/> Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group	Assign Group
<input type="checkbox"/> Creator	The client can create Bid Requests in the system	
<input type="checkbox"/> Submitter	The client can submit Bid Requests to the Department	
<input type="checkbox"/> Viewer	The client can only view Bid Requests that have been assigned to them	

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**Assign Client Id:**

All Available

Selected From List

**Select Client Ids**

Add

**Currently Selected:**

Remove Client Id

Remove

Save

The following functions are available on the **Assign Client Roles** screen:

- Add a **Role** to a **Client Account**
- Remove a **Role** from a **Client Account**
- Add a Client ID to a **Client Account**
- Remove a specific Client ID from a **Client Account**
- Assign **Client Account's** to a **Coordinator Group**

## Assign Client Roles Overview – Continued

Assign Client Roles

Select Client Account:

Select Form Type:

**Select Roles:**

Role	Description	
<input type="checkbox"/> Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group	<input type="button" value="Assign Group"/>
<input type="checkbox"/> Creator	The client can create Bid Requests in the system	
<input type="checkbox"/> Submitter	The client can submit Bid Requests to the Department	
<input type="checkbox"/> Viewer	The client can only view Bid Requests that have been assigned to them	

**Assign Client Id:**

All Available  
 Selected From List

**Select Client Ids**

801-2211 001 -	ABC Company	<input type="button" value="Add"/>
803-5650 001 -	Oil & Gas Company	
809-1554 001 -	Deep Well Company	

**Remove Client Id**

- **Select Roles** - A **Client Account** may have multiple **Roles** for a specific **Form Type**. Clicking on the box(es) next to the **Role(s)** will assign the **Role** to the **Client Account**.
- **Assign Group** - **Assign Group** function becomes available to certain **Form Types** such as Bidding and OASIS. *Only* a Site Administrator role(s) is allowed to perform the **Assign Group** function.
- **Assign/Select Client ID** - By default, the **Client Account** will have access to the All Available option, which grants access to all Client IDs that have been associated with the Site Administrator Account(s). Certain **Form Types** (i.e., Bidding Request, Posting Request, etc.) require a Client ID to be assigned to a **Client Account**. To add a client, select a Client ID, then click on the "**Add**" button.

## Assign Client Roles and Form Types

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts
      - Create Client
      - Assign Roles
      - Edit Client
      - User Profile Report
  - Encryption
  - Reports
  - User Training

Assign Client Roles

**Select Client Account:** EA0331\_JOHNS -- <johnsmith@company.net> ▼

**Select Form Type:** Crown Mineral Activity Application ▼

**Select Roles:**

	Role	Description
<input type="checkbox"/>	Creator	The user can create a new application in the system
<input type="checkbox"/>	Submitter	The user can submit an application to the department
<input checked="" type="checkbox"/>	Viewer	The user can view all applications in the system

Check the Role to be assigned

Drop Down

After the **Client Account** is create you will need to **Assign Client Roles and Form Type(s)** to the **Client Account**. Select the **Client Account** by using the drop down arrow and then select the **Form Type** using the other drop down arrow. Once the **Form Type** has been selected, the **Select Roles** for that **Form Type** will populate on the bottom of the screen. Check off the **Role** type the **Client Account** will require for the **Form Type**. Select **Save**.

## Assign Client Roles and Form Types - Continued

### Assign Client Roles

Select Client Account: EA0331\_JOHNS -- <johnsmith@company.net>

Select Form Type: Electronic Assignment

Select Roles:

Role	Description
<input checked="" type="checkbox"/> Concurrer	The client can concur an Assignment
<input checked="" type="checkbox"/> Creator	The client can create an Assignment in the system
<input checked="" type="checkbox"/> Reviewer	The client can submit an Assignment for Concurrence

Assign Client Id:

All Available

Selected From List

Save

This example is showing **Multiple Roles** on a **Form Type** and assigning **All Available** Client IDs to the **Form Type**, then selecting **Save**.

### Assign Client Roles

Select Client Account: EA0331\_JOHNS -- <johnsmith@company.net>

Select Form Type: Electronic Assignment

Select Roles:

Role	Description
<input checked="" type="checkbox"/> Concurrer	The client can concur an Assignment
<input checked="" type="checkbox"/> Creator	The client can create an Assignment in the system
<input checked="" type="checkbox"/> Reviewer	The client can submit an Assignment for Concurrence

Assign Client Id:

All Available

Selected From List

Select Client Ids

801-2211 001 -	ABC Company	Add
803-5650 001 -	Oil & Gas Company	
809-1554 001 -	Deep Well Company	

Remove Client Id

Remove

Save

This example is showing **Multiple Roles** on a **Form Type** and assigning Client ID(s) from the dropdown **Selected List** to the **Form Type**, then selecting **Save**.

Continued onto next page



## Assign Client Roles and Form Types - Continued

Assign Client Roles

**Select Client Account:** EA0331\_JOHNS -- <johnsmith@company.net> ▼


**Select Form Type:** Crown Mineral Activity Application ▼

**Select Roles:**

	Role	Description
<input type="checkbox"/>	Creator	The user can create a new application in the system
<input type="checkbox"/>	Submitter	The user can submit an application to the department
<input checked="" type="checkbox"/>	Viewer	The user can view all applications in the system

Save


Message from webpage ✕



Data saved successfully

OK

Data saved successfully  
 screen will populate,  
 select **Ok**.

 **NOTE:** When work is generated using a specific **Form Type** (example: Crown Mineral Activity Application), all **Client Accounts** with that specific **Form Type** will receive all email notifications associated with that specific **Form Type**.



## Assign Client Accounts to a Coordinator Group

**Assign Client Roles**

Select Client Account: EA0331 -- <Energy.AT\_Support@gov.ab.ca>

Select Form Type: Bid Request

Select Roles:

Role	Description
<input checked="" type="checkbox"/> Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group
<input checked="" type="checkbox"/> Creator	The client can create Bid Requests in the system
<input checked="" type="checkbox"/> Submitter	The client can submit Bid Requests to the Department
<input checked="" type="checkbox"/> Viewer	The client can only view Bid Requests that have been assigned to them

Assign Group

Assign Group -- Webpage Dialog

**Assign Group**

Form Type: Bid Request

Coordinator Account: EA0331 --

Select Client Account: EA0331 Add

Managed Client Account	Client Account Name	
EA0331	EA0331_CREATED	
EA0331_COORDINATOR	EA0331_CREATORNEW	Delete
	EA0331_NOTHING	Delete
	EA0331_SUBMITNEW	
	EA0331_VIEWD	
	EA0331_VIEWERNEW	

Clients with coordinator assigned any client accounts will be automatically assigned to this group.

Save Close

Certain **Form Types** allow the Site Administrator(s) to assign the **Coordinator Role** to a specified set of **Client Accounts** within the company. When the **Coordinator Role** is checked in the "Assign Client Roles" screen, the "Assign Group" button will become available.

1. Select the "Assign Group" button
2. Select a **Client Account** from the Select **Client Account** dropdown list.
3. Click the **Add** button to update the Managed **Client Accounts** List.
4. When done entering the **Client Accounts** to be managed by the Coordinator, click the **Save** button.
5. If you do not want to continue click the **Close** button to exit the screen.



**NOTE:** If a coordinator doesn't have anyone assigned to their group, then that person is a coordinator for the whole company within the selected form type.

## Remove Client Role from an Assign Group

### Assign Client Roles

**Select Client Account:** EA0331\_JOHNS -- <johnsmith@company.net>

**Select Form Type:** Bid Request

**Select Roles:**

	Role	Description	
<input checked="" type="checkbox"/>	Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group	<input type="button" value="Assign Group"/>
<input checked="" type="checkbox"/>	Creator	The client can create Bid Requests in the system	
<input checked="" type="checkbox"/>	Submitter	The client can submit Bid Requests to the Department	
<input checked="" type="checkbox"/>	Viewer	The client can only view Bid Requests that have been assigned to them	

---

**Assign Client Id:**

All Available

Selected From List

**Select Client Ids**

803-5650 001 - Oil & Gas Ltd.

**Currently Selected:**

Remove Client Id	
<input checked="" type="checkbox"/>	801-2211 001 - ABC Company Ltd.

- **Select Roles** - Remember to SAVE your changes after removing the **Client Role(s)** from the currently selected list.
- **Assign Group** - Removing a **Coordinator Role** for certain form types (i.e., Bidding, OASIS, etc.) will automatically remove the Groups assigned to the **Coordinator Role**.
- **Currently Selected** - Certain **Form Types** require a Client ID to be assigned to a **Client Account**.

## Remove Client Role – Continue

### Assign Client Roles

1. Select Client Account

Select Client Account: EA0331\_JOHNS -- <johnsmith@company.net>

2. Select Form Type

Select Form Type: Bid Request

#### Select Roles:

	Role	Description	
<input checked="" type="checkbox"/>	Coordinator	The client can see all Bid Requests within their company and re-assign requests as necessary unless limited by certain group	Assign Group
<input type="checkbox"/>	Creator	The client can create Bid Requests in the system	
<input checked="" type="checkbox"/>	Submitter	The client can submit Bid Requests to the Department	
<input checked="" type="checkbox"/>	Viewer	The client can only view Bid Requests that have been assigned to them	

3. Blank Check Box

#### Assign Client Id:

- All Available
- Selected From List

#### Select Client Ids

803-5650 001 - Oil & Gas Ltd.

#### Currently Selected:

##### Remove Client Id

801-2211 001 - ABC Company Ltd.

4. Blank Check Box

5. Save

To **Remove** a **Role(s)** from a **Client Account**, the following are the guidelines:

1. A **Client Account** must be selected.
2. The appropriate **Form Type** must be selected.
3. If the currently selected **Client Role(s)** is no longer required, the check mark in the checkbox next to the client role(s) should be removed.
4. If currently selected Client ID is no longer assigned to the **Form Type**, the check mark in the box next to the Client ID should be removed. Remember to click on the Remove button.
5. Be sure to click on the **Save** button to save changes.



**NOTE:** Ensure to click on the Remove button before Save.

## Remove a Form Type from Client Account

**Assign Client Roles**

Select Client Account: EA0331\_JOHNS -- <johnsmith@company.net>

Select Form Type: Agreement Cancellation Report

Select Roles:

Role	Description
<input checked="" type="checkbox"/> Retriever	The client can retrieve files published by the Department for this form type.

1. Select Client Account

2. Select Form Type

Save

To **Remove** a **Form Type** from a **Client Account**, the following are the guidelines:

1. Select **Client Account** from the dropdown
2. Select **Form Type** from the dropdown
3. Uncheck the **Form Type**
4. **Save**

**Assign Client Roles**

Select Client Account: EA0331\_JOHNS -- <johnsmith@company.net>

Select Form Type: Agreement Cancellation Report

Select Roles:

Role	Description
<input type="checkbox"/> Retriever	The client can retrieve files published by the Department for this form type.

3. Uncheck Form Type

4. Save

Save

## Edit Client Account

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

Edit Client Account

**Select Client Account:**  
 EA0331\_JOHNS -- <johnsmith@company.net>

**Action:**

Edit client account details  
 Reset password  
 Delete client account

**\*First Name:**

**\*Last Name:**

**\*Phone Number (999) 999-9999:**       **Fax Number (999) 999-9999:**

**\*Email Address:**

**\*Repeat Email Address:**

**Business Area:**

**\* - denotes Required Field**

**Client Accounts** may be edited by the Site Administrator(s).

The Administrator(s) may:

- **Edit the Client Account Details,**
- **Reset the Password, or**
- **Delete the Client Account.**

## Edit Client Account - Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Question
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

1. Select Account

2. Select Client Accounts

3. Edit Client

4. Select Client

### Edit Client Account

**Select Client Account:**  
 EA0331\_JOHNS -- <johnsmith@company.net> ▼

**Action:**

Edit client account details

Reset password

Delete client account

---

**\*First Name:**

**\*Last Name:**

**\*Phone Number (999) 999-9999:**       **Fax Number (999) 999-9999:**

**\*Email Address:**

**\*Repeat Email Address:**

**Business Area:**

\* - denotes Required Field

To edit the **Client Account** use the dropdown arrow and select the **Client Account** you want to Edit. Select the “**Edit Client Account Details**” button. This will enable you to make the following changes to the **Client Account**.

Edit:

- First Name
- Last Name
- Phone Number
- Fax Number
- Email Address

Select **Submit** to save the changes. A screen will populate stating the client details have been successfully updated.

## Edit Client Account-Reset Password - Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Question
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

1. Select Account

2. Select Client Accounts

3. Edit Client

4. Select Client

### Edit Client Account

**Select Client Account:**  
EA0331\_JOHNS -- <johnsmith@company.net> ▼

**Action:**

Edit client account details

**Reset password**

Delete client account

---

**New Password:**

**Repeat New Password:**

Please select a password that meets all of the following criteria:

- is at least 12 characters and no more than 127 characters.
- does not contain your account or full name.
- contains at least 3 of the following 4 groups.
  - English upper case characters (A through Z).
  - English lower case characters (a through z).
  - Numerals (0 through 9).
  - Non alphabetic characters (such as !, \$, #, %).

To reset a password on a **Client Account**, select the **“Reset Password”** button on the **Edit Client Account** screen. Using the drop down arrow select the **Client Account** for which you want to Reset the Password.

On this screen the user will be required to enter the new password twice. The password needs to conform to all the password complexity and history requirements already implemented in ETS, then select **Submit**.

**NOTE:** Ensure you have reviewed the module, **ETS Password Reset** located at Accounts (ETS) Administration-Online Learning website at: <https://training.energy.gov.ab.ca/Pages/Accounts%20In%20ETS.aspx>

Continued onto next page



## Edit Client Account-Reset Password - Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

**Edit Client Account**

**Select Client Account:**  
 EA0331\_JOHNS -- <johnsmith@company.net>

**Action:**

Edit client account details  
 Reset password  
 Delete client account

---

**New Password:**  
 \*\*\*\*\*

**Repeat New Password:**  
 \*\*\*\*\*

Once the password is submitted and changed successfully, it will be active for 360 days and then a reminder notification will be sent to the user.



**NOTE:** ETS will not allow the reuse of the last ten passwords on your account, nor the use of more than two sequential characters from your User Account/User Name.

**Edit Client Account**

**Client Details Updated.**

The client details have been successfully updated. The changes will take effect immediately.



## Edit Client-Delete Client Account- Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Question
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

1. Select Account

2. Select Client Accounts

3. Edit Client

4. Select Client

Edit Client Account

**Select Client Account:**

EA0331\_JANEDOE -- <janedoe@sample.net> ▼

**Action:**

Edit client account details

Reset password

**Delete client account**

To remove a **Client Account**, select the client from the dropdown box and then select **Delete Client Account** from the **Action** items. Once you have completed these actions select the **Submit** button to delete the **Client Account**.

## Edit Client-Delete Client Account- Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client**
      - User Profile Report
  - Encryption
  - Reports
  - User Training

### Edit Client Account

**Delete Client Account Warning**

Warning: You are about to delete the client account for: **EA0331\_JANEDOE**

You will still be able to view past requests submitted by this client, however, it will not be possible to log in with this id. Are you sure you want to delete this client account?

Once you have submitted your request to delete the **Client Account**, the system will then populate a **Delete Client Account Warning**. Review the information on the screen to ensure you are deleting the chosen **Client Account** and then select **Delete Account**.

### Edit Client Account

**Client Account Deleted.**

**Client Account Deleted** will appear once the account has been deleted.

## Account Description

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Payment
  - Offset
  - Account**
    - Preferences
    - Description**
    - Change Password
    - Security Questions
    - Client Accounts
    - Encryption
    - Reports
    - User Training

1. Select Account

2. Select Description

### Account Description

Role Assignments

Filter by:

Client Account Name EA0331 -- <Energy\_AT\_Support@gov.ab.ca>

Form Type Agreement Cancellation Report

Client Account Name	Form Type	Role
EA0331_COORDINATORNE	Oil sands Supplemental Reporting	Submitter
EA0331_COORDINATORNE	Oil sands Supplemental Reporting	Viewer
EA0331_COORDINATORNE	Statement of account for Oilsands activities	Retriever
EA0331_CREATED	Agreement Documents	Viewer
EA0331_CREATED	Bid Request	Creator
EA0331_CREATED	Bid Request	Submitter
EA0331_CREATED	Bid Request	Viewer
EA0331_CREATED	Mineral - First	Viewer
EA0331_CREATED	OSR Project Application Request	Creator
EA0331_CREATED	OSR Project Application Request	Delegate
EA0331_CREATED	Oil Sands Royalty Reporting	Submitter
EA0331_CREATED	Oil Sands Royalty Reporting	Viewer
EA0331_CREATED	Oil sands Supplemental Reporting	Submitter
EA0331_CREATED	Oil sands Supplemental Reporting	Viewer
EA0331_CREATED	Statement of account for Oilsands activities	Retriever
EA0331_CREATORNEW	Bid Request	Creator
EA0331_CREATORNEW	Mineral - First	Viewer
EA0331_CREATOR_OSR1	Bid Request	Creator
EA0331_CREATOR_OSR1	Bid Request	Submitter
EA0331_CREATOR_OSR1	Bid Request	Viewer
EA0331_CREATOR_OSR1	Mineral - First	Viewer
EA0331_DD	Bid Request	Creator
EA0331_DD	Bid Request	Submitter
EA0331_DD	Bid Request	Viewer
EA0331_DD	Mineral - First	Viewer
EA0331_DD	OS Client Reports	Viewer
EA0331_DD	OSR Project Application Request	Coordinator
EA0331_DD	OSR Project Application Request	Creator
EA0331_DD	OSR Project Application Request	Delegate
EA0331_DD	OSR Project Application Request	Submitter
EA0331_DD	OSR Project Application Request	Viewer
EA0331_DD	Oil Sands Royalty Reporting	Submitter
EA0331_DD	Oil Sands Royalty Reporting	Viewer
EA0331_DD	Oil sands Supplemental Reporting	Submitter
EA0331_DD	Oil sands Supplemental Reporting	Viewer
EA0331_DD	Posting Request	Approver
EA0331_DD	Posting Request	Coordinator
EA0331_DD	Posting Request	Creator

The **Description** option from the **Account Menu** allows for the details of the **Client Accounts** to be displayed. It shows the **Role Assignments** of each **Client Account** and the listing of available contacts for each **Form Type**.

The first screen to be populated under **Description** will show all the **Client Accounts** and their **Form Types** assigned to each **Client Account**.

## Account Description

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description**
    - Change Password
    - Security Questions
    - Client Accounts
    - Encryption
    - Reports
    - User Training

### Account Description

Role Assignments

Filter by:

Client Account Name EA0331\_JOHNS -- <johnsmith@company.net>

Form Type Agreement Cancellation Report

1. Select Client

Client Account Name	Form Type	Role
EA0331_JOHNS	Agreement Cancellation Report	Retriever
EA0331_JOHNS	Agreement Documents	Viewer
EA0331_JOHNS	Bid Request	Coordinator
EA0331_JOHNS	Bid Request	Viewer
EA0331_JOHNS	Crown Mineral Activity Application	Viewer

Listing of available contacts and forms they are allowed to submit.

Form Type	Contact	Phone Number	Email Address
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You can then **Filter** by **Client Account Name** by using the dropdown listing and selecting **Submit**. This will display all the **Form Types** assigned to a specific **Client Account**.

Continued onto next page

## Account Description

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description**
    - Change Password
    - Security Questions
    - Client Accounts
  - Encryption
  - Reports
  - User Training

### Account Description

Role Assignments

Filter by:

Client Account Name EA0331 -- <Energy.AT\_Support@gov.ab.ca>

Form Type Bid Request

Client Account Name	Form Type	Role
EA0331	Bid Request	Coordinator
EA0331	Bid Request	Creator
EA0331	Bid Request	Submitter
EA0331	Bid Request	Viewer
EA0331_AGMTVIEWJULY	Bid Request	Creator
EA0331_AGMTVIEWJULY	Bid Request	Submitter
EA0331_ALL	Bid Request	Viewer
EA0331_BAS	Bid Request	Coordinator
EA0331_BAS	Bid Request	Creator
EA0331_BAS	Bid Request	Submitter
EA0331_BAS	Bid Request	Viewer
EA0331_COORDINATENEW	Bid Request	Creator
EA0331_COORDINATOR1	Bid Request	Coordinator
EA0331_COORDINATORNE	Bid Request	Creator
EA0331_COORDINATORNE	Bid Request	Submitter
EA0331_COORDINATORNE	Bid Request	Viewer
EA0331_CREATED	Bid Request	Creator
EA0331_CREATED	Bid Request	Submitter
EA0331_CREATED	Bid Request	Viewer
EA0331_CREATORNEW	Bid Request	Creator
EA0331_CREATOR_OSR1	Bid Request	Creator
EA0331_CREATOR_OSR1	Bid Request	Submitter
EA0331_CREATOR_OSR1	Bid Request	Viewer
EA0331_DD	Bid Request	Creator
EA0331_DD	Bid Request	Submitter
EA0331_DD	Bid Request	Viewer
EA0331_JOHNS	Bid Request	Coordinator
EA0331_JOHNS	Bid Request	Viewer
EA0331_NOTHING	Bid Request	Creator
EA0331_NOTHING	Bid Request	Submitter
EA0331_NOTHING	Bid Request	Viewer
EA0331_SUBMITD	Bid Request	Submitter
EA0331_SUBMITNEW	Bid Request	Submitter

1. Select Form Type

You can then **Filter** by **Form Type** by using the dropdown listing and selecting Submit. This will display all the **Client Accounts** assigned to a specific **Form Type**.

## User Profile Report

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct P
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
    - Security Questions
    - Client Accounts**
      - Create Client
      - Assign Roles
      - Edit Client
      - User Profile Report**
  - Encryption
  - Reports
  - User Training

1. Select Account

2. Select Create Accounts

3. Select User Profile Report

User Profile Report

**Business Area:** All Business Areas ▼

**Client Account:** All Client Accounts ▼

4. Select Client Account

The **User Profile Report** provides a summary of the **Client Account** information and is useful for client account maintenance.

Using the dropdown on the **Client Account** selection, you can run the **Profile Report** for all the **Client Accounts** with in your company on one report. Or, the **Profile Report** can be run for each individual **Client Account**.

Continued onto next page

## User Profile Report - Continued

- ETS Home
  - About ETS
  - Contacts
  - Request Status
  - Land Searches
  - PNG Continuation
  - Agreement Management
  - Crown Mineral Activity
  - Posting Request
  - Bid Request
  - Unit Agreement Exhibit A
  - Transfers
  - Assignments
  - Freehold Mineral Tax
  - Oil Sands
  - Encumbrance
  - Mineral Direct Purchase
  - Offset
  - Account**
    - Preferences
    - Description
    - Change Password
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    - Client Accounts**
      - Create Client
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      - Edit Client
      - User Profile Report**
  - Encryption
  - Reports
  - User Training

July 31, 2019  
1:37:51 PM

**ELECTRONIC TRANSFER SYSTEM**  
**CLIENT PROFILE REPORT**  
 Business Area - All Business Areas

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**Contact Information**

CLIENT ID: EA0331  
 First Name: AT Surname: AT  
 Phone Number: 780 555 1212 Fax Number:  
 Business Name: ABC Company Ltd. Email Address: abocompany@net.com

Business Area: Last Login: 2019-06-19 3:52:23 PM

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**Client Information**

B/AID	Client ID	Address ID	Business Name	Status
OL69	0000253	001	ABC Company Ltd.	ACTIVE
OHE9	\$012211	001	123 Company Corporation	ACTIVE
OP16	\$035294	001	AAA Oil and Gas	ACTIVE
OC5H	\$035650	001	Energy Oil and Gas	ACTIVE
OWC5	\$043660	001	High Stakes Corporation	CANCELLED
A327	\$091554	001	Deep Drilling Corp.	ACTIVE

---

**User Roles and Permissions**

Form	Form Type	Form Role
Agreement	AGRAUTH	Concurreur
Management-Authorization Agreement	AGRAUTH	Submitter
Management-Authorization Agreement	AGRAUTH	Viewer
Management-Authorization Agreement		

---

**Client ID for Agreement Management-Authorization**

B/AID	Client ID	Address ID	Business Name
All			

---

**Agreement Documents**

Client ID for Agreement Documents	Form Type	Form Role
	AGREEMENT	Viewer

---

**Client ID for Agreement Documents**

B/AID	Client ID	Address ID	Business Name
All			

---

**Electronic Assignment**

Form	Form Type	Form Role
Electronic Assignment	ASSIGNMENT	Concurreur
Electronic Assignment	ASSIGNMENT	Creator
Electronic Assignment	ASSIGNMENT	Reviewer

---

**Client ID for Electronic Assignment**

B/AID	Client ID	Address ID	Business Name
All			

---

**Bid Request**

BID	Coordinator Group
	EA0331
	EA0331_COORDINATORNE
	EA0331_AGMVIEWJULY

The information displayed in the **User Profile Report** includes the **Client's Contact Information**, **Client Information**, and their **Form Types, User Roles and Permissions**.

# Congratulations!

## You have completed the ETS – Client Account Set up and Maintenance Online Training Course

Please proceed to the subsequent modules detailing the functionality  
contained within each module of the application.

To access **Courses, Guides, Forms** for all of your **ETS Business**  
please see ETS Support & Alberta Online Learning at:  
<https://training.energy.gov.ab.ca/Pages/Accounts%20In%20ETS.aspx>

For information on your **ETS account**, please contact:

Alberta Energy Crown Land Data  
Phone: (780) 644-2300  
E-mail inquiries: [crownlanddatasupport@gov.ab.ca](mailto:crownlanddatasupport@gov.ab.ca)

