

Welcome!

To the ETS – Direct Purchase Request Online Training Course

The **Direct Purchase** functionality in Posting allows users to submit a request to acquire Crown Petroleum and Natural Gas (PNG) and Oil Sands (OS) rights without going through the public offering process.

Revision

Date	Revisions Type	Page Number
August 31, 2012	Conversion	All
April 2020	Updated	All
December 2020	Updated ETS login page	Various

Introduction



In this module, you will learn how to:

- Add/Change Direct Purchase Request Detail
- Add Parcel of Land using any of the following options
 - Enter Land
 - Load from File
 - Load from Rights Available
- Retrieve/Change Client(s)
 - Designated Representative
 - Bonus/Fee/Rent Payor
 - Lessee
- Add Roles
 - Viewer
 - Submitter
 - Approver
- Accept/Decline Purchase Price
- Retrieve Agreement Documents

Initiate Requests

[More Information
\(Pages 5 to 28\)](#)

There are four types of Direct Purchase requests for PNG and five types for Oil Sands:

1. The Portion type is where there is both Crown and non-crown mineral rights ownership in the spacing unit. If you control the freehold minerals by title or an active lease, you can lease the Crown portion. There are some restrictions which are explained in the Posting Rules. A statutory declaration is required by Alberta Energy as confirmation that you control the freehold minerals.
2. The Complementing Rights type is where the lessee of an oil sands agreement can lease the associated natural gas rights that match the oil sands zones.
3. The Single Substance type is where you have either the petroleum or the natural gas in an active agreement and you can ask Alberta Energy to lease you the other substance. Your existing agreement will be amended by adding the other substance.
4. There is also a Miscellaneous type but that is only used if Alberta Energy instructs you to use this type
5. The Road Allowance type is only used for Oil Sands agreements. Lessees may request the direct purchase of Crown oil sands rights underlying statutory road allowances established by the Crown that fall within the Surface Mineable Area, if the road allowances are not included in their existing agreement.

Request Detail Tab

Direct Purchase

[Posting Rules](#)

Request Detail	Land	Client	Roles
Comment:	<input type="text"/>		
Mineral Type:	<input type="text" value="▼"/>		
Direct Purchase Type:	<input type="text" value="▼"/>		
Agreement Type:	<input style="width: 100%;" type="text" value="Lease"/>		
Status:	<input type="text" value="Work in Progress"/>		
Created By:	<input style="width: 100%;" type="text" value="ES2435"/>		
Requestor:	<input style="width: 100%;" type="text" value="HAPPY DRILLING CO LTD."/>		
Contact:	<input style="width: 100%;" type="text" value="John Smith"/>		

The Request Detail tab allows you to enter or change information about your request.

Enter a comment to identify the request (optional field). If you entered a comment in your Account Preferences it will be shown here.

Select the Mineral Type (PNG or OS).

Select the Direct Purchase Type.

Enter an Agreement Number if you are doing a Complementing Rights or Single Substance type of Direct Purchase.

Request Detail Tab - Continued

For PNG, the Agreement Type will default to Lease with the option of changing to a Licence.

For OS, the Agreement Type will default to Lease with the option of changing to a Permit.

The status of the request will be displayed as work in progress until the request is submitted to Alberta Energy

The Created By and Contact fields will be defaulted to your user name and the Requestor field will indicate your company name. The contact will receive notification by email regarding updates to the request.

Tip: Only the Coordinator can use the drop down arrow to select a different Creator.

Land Tab



The screenshot shows a web interface for a 'Direct Purchase' request. At the top, there is a blue header with the text 'Direct Purchase'. Below this, there is a 'Posting Rules' link. The main content area has four tabs: 'Request Detail', 'Land', 'Client', and 'Roles'. The 'Land' tab is currently selected. Below the tabs, there is a message: 'Please use the Add Land button to select the land for this request.' and an 'Add Land' button. At the bottom of the interface, there are three buttons: 'Submit', 'Save', and 'Close', along with left and right navigation arrows.

The Land tab allows you to add, change or delete the land, and change rights (PNG only).

For a Single Substance type Direct Purchase the land and rights will be populated from the agreement entered. Changes cannot be made.

Enter Land and Rights

Land and Rights

Enter Land
More Land

Parcel	M	RGE	TWP	SEC	QS/LSD	Portion
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Load From File

Load From Rights Available Request

Substance	Qualifier	Zone
PETROLEUM AND NATURAL GAS	From Top	SURFACE
	To Base	BASEMENT

Method 1 – Enter Land and Rights

You can enter land and rights manually on the Land and Rights screen.

Enter the land description. Select the Portion check box if the land you are requesting has Crown and non-Crown mineral rights ownership.

Tip:

- ✓ If the Meridian, Range and Township are identical for the next section of land, you do not need to enter this information again
- ✓ Only one parcel can be added for a direct purchase.

The substance will be defaulted to Petroleum and Natural Gas for a PNG Request. This allows Alberta Energy to process the request for both substances.

Enter Land and Rights Continued

For PNG the Zones are defaulted to Surface to Basement with the option to change.

Tip: If the zones are different for each section of land, leave as Surface to Basement. This can be changed in the Land screen. If you are requesting all available rights leave the default as Surface to Basement.

For OS the zones are defaulted to Surface to Basement, no changes allowed. When processed by Alberta Energy, any available rights within the respective OS area may be granted.

Enter Land and Rights – Load from Rights Available Request

Land and Rights

Enter Land

Parcel	M	RGE	TWP	SEC	QS/LSD	Portion
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Load From File

Load From Rights Available Request

Substance	Qualifier	Zone
PETROLEUM AND NATURAL GAS	From Top <input type="button" value="v"/>	SURFACE <input type="button" value="v"/>
	To Base <input type="button" value="v"/>	BASEMENT <input type="button" value="v"/>

Method 3 - Load from Rights Available Request

You can load the requested land by selecting the Request that you have made in the past 60 days that have rights available.

Land Tab - Zones

Posting Rules

Request Detail Land Client Roles

Parcel 01

01 4 19 058 34 Portion: Delete

Substance	Qualifier	Zone
PETROLEUM AND NATURAL GAS	From Top	SURFACE
	To Base	BASEMENT

Add Land

Submit Save Close

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Use the drop down arrow to select the Qualifier, either From Top, To Base, From Base and To Top.

To change the zones, click on the ellipsis (...) button to open the Zone table. You can sort the zones by Name or Depth. Click on the Select button to the right of the zone you want.

Land Tab – Zone Table

Original Request Document

Request Detail

Parcel 01

01 4 - 19 - 058

Substance

PETROLEUM AND NAT

Parcel 02

02 4 - 19 - 058

Substance

PETROLEUM AND NAT

02 4 - 19 - 058

Substance

PETROLEUM AND NAT

Zone - Webpage Dialog

Sort by: Name Depth

Zone	
ARCS MBR	Select
BADHEART-MUSKIKI	Select
BAKKEN FM	Select
BALDONNEL FM	Select
BANFF FM	Select
BASAL BELLY RIVER SD	Select
BASAL BLAIRMORE	Select
BASAL COLO & MANNVILLE	Select
BASAL COLORADO SD	Select
BASAL CRETACEOUS	Select
BASAL GETHING	Select
BASAL MANNVILLE	Select
BASAL QUARTZ SD	Select
BASAL QUARTZ-DETRITAL	Select
BASE FISH SCALES ZONE	Select
BASE OF U. CLNY TO T. MCMY	Select
BASEMENT	Select
BEARPAW FM	Select
BEAVERHILL LAKE GRP	Select
BELLOY FM	Select
BELLY RIVER GRP	Select
BLAIRMORE GRP	Select
BLSK. BLHD. DRIT. SHLN	Select

To Base BASEMENT

Please use the Add Land button to select the land for this request.

Add Land

Submit Delete Save Close

For a Portion type direct purchase, the Crown rights must match the freehold rights indicated in the statutory declaration.

For Complementing Rights type direct purchase, the rights must match the rights in your oil sands agreement.

For a Single Substance type direct purchase, the rights will be populated from the agreement number that was entered. No changes allowed.

Client Tab

Direct Purchase

Posting Rules

Request Detail
Land
Client
Roles

Designated Representative:

Bonus/Fee/Rent Payor:

If the Payor is different from the Requestor, a letter of authorization is required.

Confidential Rent Payor:

	Lessee	Percent
Delete	HOPEFUL OIL & GAS INC	100

The Department will contact you if a letter of authorization is required due to ownership situations.

Submit
Save
Close

Click on the Retrieve Existing Clients button. The Designated Representative, Bonus/Fee/Rent Payor and Lessee fields are defaulted to your client name.

You can use the ellipsis (...) button to change the fields or add additional Lessees.

Tips:

- For a Portion type Direct Purchase, the Lessee(s) must correspond to the client that has control of the freehold minerals.
- For a Complementing Rights type Direct Purchase, the Designated Representative, and Lessee fields will be populated to match the holders of the oil sands agreement you entered. No changes allowed.
- For a Single Substance type Direct Purchase, the Designated Representative and Lessee fields will be populated to match the holders of the petroleum or natural gas agreement you entered. No changes allowed.
- If the Bonus/Fee/Rent Payor is different from the Requestor, a letter of authorization is required.
- Any changes to a request must be made before the request is submitted. Any future changes to a request can still be done by contacting the Sales group.
- Saving a request does not submit it to Alberta Energy.
- If the request has no errors, a Request number will be indicated at the top of the screen and a link to the Original Request Document will be visible. This document details the information entered for the request.

Roles Tab

The screenshot shows a web application interface for 'Direct Purchase'. At the top, there is a blue header with the text 'Direct Purchase'. Below this, there is a 'Posting Rules' link. The main content area is divided into four tabs: 'Request Detail', 'Land', 'Client', and 'Roles'. The 'Roles' tab is currently selected. Under the 'Roles' tab, there are three sections: 'Viewers', 'Submitters', and 'Approvers'. Each section contains a text input field with the value 'EA0508', a 'Delete' button, and an 'Add' button. At the bottom of the interface, there are three buttons: 'Submit', 'Save', and 'Close'.

The Roles tab is used to define who can view, submit and approve your request. If you have already added a viewer, submitter, or approver by accessing the Accounts folder, Preferences page, Posting Request Preferences, the Viewer and Submitter and Approver boxes will be filled in. You can add or delete Viewers, Submitters and Approvers for each request.

Tip: If the submitter and the creator of the request are different users, it is the responsibility of the creator to advise the submitter that the request is now available for submission to Alberta Energy

Purchase Price Tab

Direct Purchase 13009

Original Request Document
Posting Rules

Request Detail	Land	Client	Roles	Purchase Price
Designated Representative: <input type="text"/>				
Payor: <input type="text"/>				
Confidential Rent Payor: <input type="text"/>				
Bonus:				\$500,000.00
Fee:				\$625.00
Rent:				\$896.00
Total:				\$501,521.00

Please notify the payor before accepting. Payment will be processed on acceptance

When Alberta Energy has finished processing your request, you will be notified that acceptance of the purchase price is required.

The user that has the assigned Approver role can click on the Purchase Price tab and then select the Accept or Decline button. Selecting the Accept button informs Alberta Energy to proceed with your request and remove the funds from your bank account. Selecting the Decline button informs Alberta Energy to Client Withdraw your request.

Please note that if you do not accept the offer you will not be able to request the lands again through a Direct Purchase and can only request them for the Public Offering.

Tip: If the requestor accepting the purchase price and the payor are different, it is the requestor's responsibility to inform the payor that the money is being removed from his account.

Retrieve Agreement Document

When Alberta Energy has completed your request, the Designated Representative can retrieve the agreement document by opening the Request Status folder on the main menu.

All agreements will be removed from the Request Status folder based on your Site Administrator's Account Preferences Setting - Delete requests after X days. If you wish to keep the agreement you must save the file to your own system.

Resources

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

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

Congratulations!

You have completed the ETS – Direct Purchase Request Online Training Course

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

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

Postings.Energy@gov.ab.ca

