

Welcome!

**To the ETS – Work in Progress
Online Training Course**

The Work In Progress functionality of Transfers enables you to retrieve a transfer request, view/change the request status depending on your role, delete a transfer request and create a new request by copying an existing one.

In addition, it allows you to view the electronic copy of the Memorandum of Registration if the transfer request was approved by Alberta Energy.

Date	Revisions Type	Page Number
August 31, 2012	Conversion	All
April 2020	Cosmetic Updated	All

Introduction

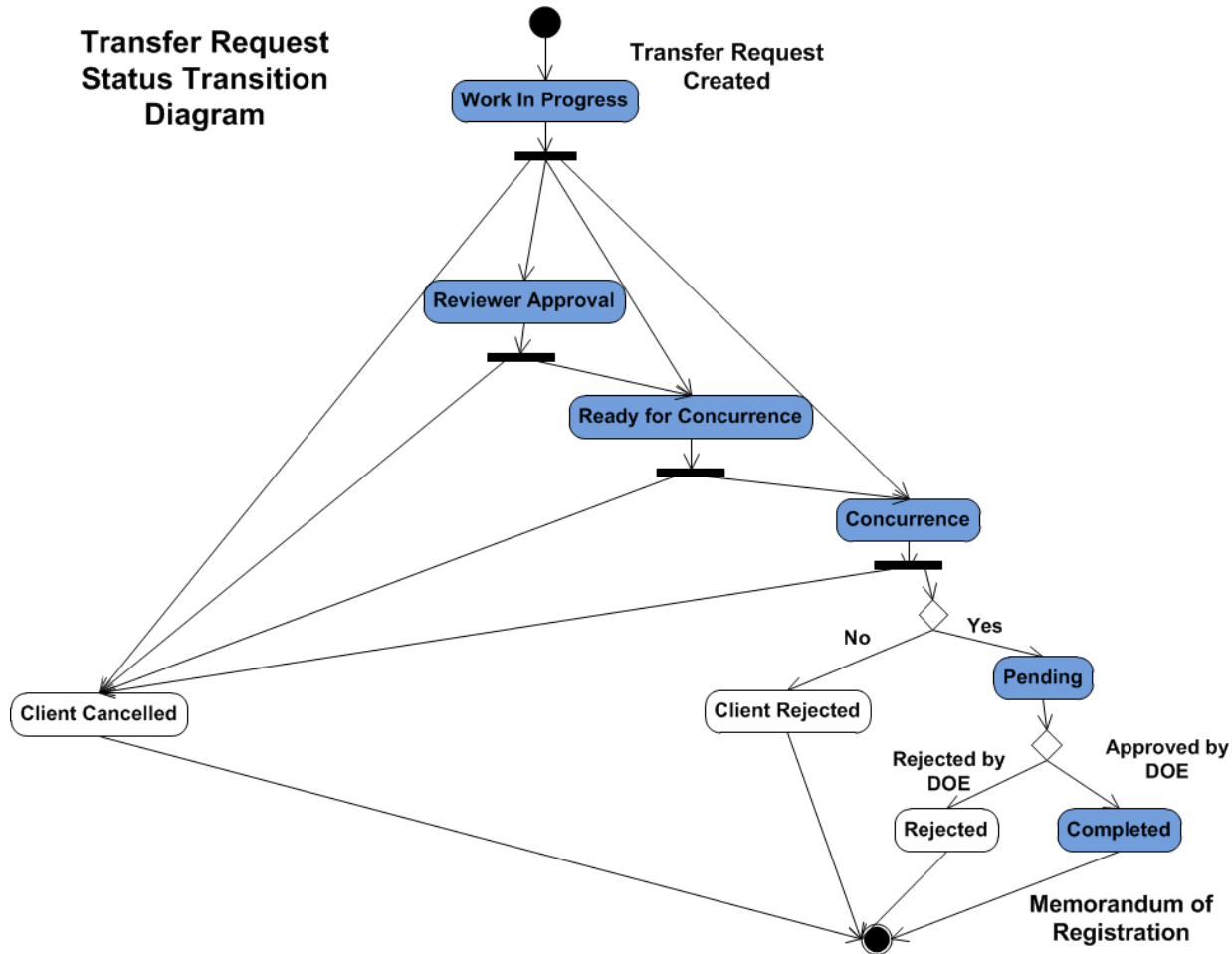


In this module, you will learn how to:

- Request Reviewer Approval of Transfer
- Approve Transfer or Set to Concurrence
- Concur/Reject Transfer
- View Memorandum of Registration
- Delete Transfer
- Copy Transfer

Transfer Request Status Change

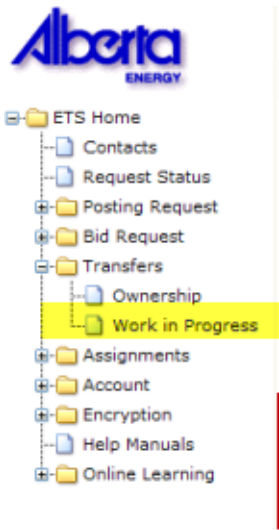
Transfer Request
Status Transition
Diagram



The figure on the left hand shows how the status of a transfer request changes from one state to another. The statuses are set by the client(s) depending on the role(s) assigned by the Site Administrator within the company.

Work in Progress – Find Transfer Request

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



[ENMUDUO](#) [Logout](#)

Work in Progress

Type: Request Number:

Start Date: End Date:

Status:

Search Results

#	Form	Comment	Status	Initiator
303662	Transfer	Transfer from Freehold Inc to ABC company & Hopeful Oil	Work in Progress	Transfer: MOR: HOPEFUL OIL

Page 1

- **Request Number** - You may insert a Transfer Request number if you know it (provided in e-mail notification), or, you may leave it blank and all documents within the Type indicated will be listed.
- **Status** - You can filter your search by selecting a specific status (i.e., Work In Progress, Reviewer Approval, Ready for Concurrence, Concurrence, Pending, Approved, Client Rejected, Client Cancelled, Rejected).
- **Search Results** - The results of your Work In Progress search is displayed on the window below the query option. You may re-sort the results of your query by transfer # or status.
- **Transfer Request Details** - Clicking on the magnifying glass icon will display the Transfer Request Details.
- **Status** – Displays the status of the request. If the status is Concurrence and you have a Concurrence role, you can click on this link to open the Concurrence screen. Clicking on the column header will re-sort the results in status order.
- **Formats** - If PDF, XML or TIF appear next to “Transfer” or “MOR”, you may view these documents in these formats by the clicking on any of these links. You may then save it to your local drive

Transfer Request 303662

[View Transfer Document](#)

Agreement	Transfer Type	Transferor / Transferee	Des Rep	Email	Status / Warnings
Initiated By:	<input type="text" value="809-2680 001 HOPEFUL OIL"/>				
Created By:	<input type="text" value="EA0508"/>				
Request Number:	303662				
Status:	Work in Progress				
Transfer Type:	Prorate Transferor and Transferee Percentage				
Transfer Effective Date:	<input type="text" value="2009/02/01"/> (yyyy/mm/dd)				
Comment:	<input type="text" value="Transfer from Freehold Inc to ABC company & Hopeful Oil"/>				

Reviewer Approval
Save
Delete
Close

When a new transfer request is created and saved into the database, a request number will be generated and the status of the transfer will be set to Work in Progress. The transfer request is only visible to the **Creator** role. Once satisfied, the **Creator** can proceed to request for reviewer approval. The program validates the request and if there are no client errors, the status is changed to Reviewer Approval. The **Reviewer** can then access the transfer.

Click on *More Information* to view how to **request for reviewer approval**.

Ready for Concurrence

[More Information
\(Pages 22 to 33\)](#)

Transfer Request 303662

[View Transfer Document](#)

Agreement	Transfer Type	Transferor / Transferee	Des Rep	Email	Status / Warnings
Agreement		Designated Representative			
+ 004 0400010066	809-2679 001	FREEHOLD INC.			
1 Agreements Selected					

Note: When the status is changed to Concurrence, e-mails will **not** be generated to internal Concurrer(s).

When a transfer request requires a reviewer approval, the **Reviewer** will retrieve and approve the request. The program validates the request and if there are no client errors, the status is changed to Ready for Concurrence.

In some instances when a **Reviewer** is also a **Concurrer**, the status will change to Concurrence. When the status is changed to Concurrence; ETS will automatically send an e-mail to the **external** Concurrer (transferee) indicating the request number of the transfer and concurrence is required. Interest will be locked at this point.

Click on *More Information* to view how to **approve request or set status to concurrence**.

Concur Transfer Request

[View Transfer Document](#)

Client	Concur	Remarks
809-2679 001 FREEHOLD INC.	Yes	Katie Vani 555 123 4567 EA0508
809-2680 001 HOPEFUL OIL	Yes	Katie Vani 555 123 4567 EA0508
809-2681 001 ABC COMPANY	<input type="button" value="v"/>	<input type="text"/>

When a transfer request requires concurrence, the individual with **Concurrer** role will be able to concur to the transfer request. The **Concurrer** has the option to select YES or NO.

If the transfer is set to NO at this point, the transfer status will automatically be set to Client Rejected and no further processing can be done on this transfer. The transfer request can be copied by the creator at this time.

If the transfer is set to YES by all parties involved in the transfer, the status will then change to Pending.

Click on *More Information* to view how to **concur/ reject transfer request**.

- **View Transfer Document** - Link to the Original Transfer Document in PDF format. Allows the concurrer to review request before deciding to concur or not.
- **Clients** - Lists all companies that are required to concur to the request to transfer ownership of registered interest. Displays the Client ID and Company Name.
- **Concur** - Defaults to Blank. Client with the Concurrer role can choose YES or NO.
- **Remarks** - is optional. Client may insert additional information in the remarks field.
- **Submit** - Clicking on the Submit button will submit the client's response to request for concurrence. After the response is submitted, the client will be unable to change the response.

Memorandum of Understanding

Work in Progress

Type: Request Number:

Start Date: End Date:

Status:

#	Form	Comment	Status	Initiator
303662	Transfer	Transfer from Freehold Inc to ABC company & Hopeful Oil	Completed	HOPEFUL OIL

Page 1

When a transfer request has been approved by Alberta Energy, a Memorandum of Registration (MOR) is created and is made available to the client(s) involved. The MOR document is generated in both PDF and XML formats. You may want to save a copy of the PDF or XML file to your local hard drive.

Once approved, the status of a transfer request will show **Completed**. Otherwise, the status will indicate that the request is **Rejected**.

Delete Transfer

[More Information
\(Pages 44 to 47\)](#)

Transfer Request 303756

[View Transfer Document](#)

Agreement	Transfer Type	Transferor / Transferee	Des Rep	Email	Status / Warnings
Agreement		Designated Representative			
+ 004 0400040043	809-2679 001	FREEHOLD INC.			Delete
1 Agreements Selected					
<input type="text" value="Search"/>					

◀

▶

When a transfer request is deleted, the status is changed to Client Cancelled. Use the **Copy Transfer** option if you want to copy the information in the cancelled request to create a new transfer request.

Only a **Creator** can delete a transfer.

Click on *More Information* to view how to **delete transfer request**.

Copy Transfer

[More Information
\(Pages 49 to 52\)](#)

Transfer Request 303756

[View Transfer Document](#)

Agreement	Transfer Type	Transferor / Transferee	Des Rep	Email	Status / Warnings
Agreement		Designated Representative			
+ 004 0400040043	809-2679 001	FREEHOLD INC.			
1 Agreements Selected					

Copy Transfer
Close

When a transfer request is rejected by the transferee client or cancelled by the transferor client, the status of the request is Client Rejected or Client Cancelled, respectively. The rejected/cancelled request can be copied to create a new one. A new request number is assigned and the transfer status is set to **Work In Progress**.

Only a **Creator** role can copy a transfer.

Click on *More Information* to view how to **copy transfer request**.

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 – Work in Progress
Online Training Course**

Please proceed to review other training modules 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

