



CONSULTANT USER GUIDE ENVIRONMENTAL REGULATORY TRACKING APPLICATION

ERTA

NOVEMBER 2016



Environmental Regulatory Tracking Application (ERTA)

ERTA Consultant User Guide

This user guide is current for ERTA Version 2.01 and will not be updated to reflect later releases. ERTA Broadcast messages should be reviewed for changes that have occurred in the application since version 2.01 (November 2017).

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Using This Manual

This user guide has been designed to assist you in using the Environmental Regulatory Tracking Application (ERTA). The following tips will help you to make the best use of this guide.

Conventions

Conventions are the common formatting used in this document.

Menus, dialog boxes, user input

- ◆ Menu commands, screen names and fields are referred to in italic text. For example: “Select **Print** from the *File* menu.”
- ◆ Keyboard keys, buttons and menu selections (things you click to select) are referred to in bold text, like this: “Press **Ctrl+P**”.
- ◆ Links are referred to in underlined text, as in “Click the Inspections link.”
- ◆ Text that you must type into a field is indicated in bold text, like this: “Type **Alberta** in the *Province* field.”

Tips and Hints

Occasionally you will see Hint, Alert and See items wrapped in borders. These are designed to draw your attention to helpful or important information. Here are samples each, with an explanation of what they mean:

Hint: This is an example of a Note or Tip. It accompanies hints that help you to work more quickly or effectively.

Alert! This is an example of a Alert. It indicates a warning or caution about potential pitfalls.

See: This is a cross reference that provides additional information. See “**Menus, dialog boxes, user input**” on page ii for additional information.

Activities

Activities give step by step instructions on how to accomplish a particular task. There are two types of activities: “How To” activities, and “Exercise” activities.

Demo/How To

A Demonstration and How To activity go hand-in-hand. Click the Demo image to run a brief simulation. You will need a headset and volume turned on to listen to the demos. The How To provides the step by step instructions about how to accomplish a particular task. It does not refer to specific data; rather it is designed to provide general instructions that could be followed any time you perform the task.

Exercise

An Exercise provides a step by step example of a task, usually using sample training data.

Revisions

Revisions have been made accordingly:

Table 0.1 Revision Schedule

Revision	Date	Description
1	Jan 14	Original version of app and guide
2	March 10	update with new screens shots after UAT changes
3	March 14	Review access for externals
4	March 29	External access steps for consultants and reviewing External help page for consultants.
5	April/May	added section for Business Process flow, Mapped out contaminated sites and permit workflows.
6	May 27	Updated guide with Business Data received from Production Pilot for permits.
7	June 22	Added Tutorials for June 22nd pilot of training guide
8	August 18, 2016	Update guide with changes from June 22nd pilot training and update with changes for RLS 2.0
9	August 29, 2016	Update guide with RLS 2.0 changes Environmental Projects.
10	Nov 2016	Update guide with business review changes and tutorials.

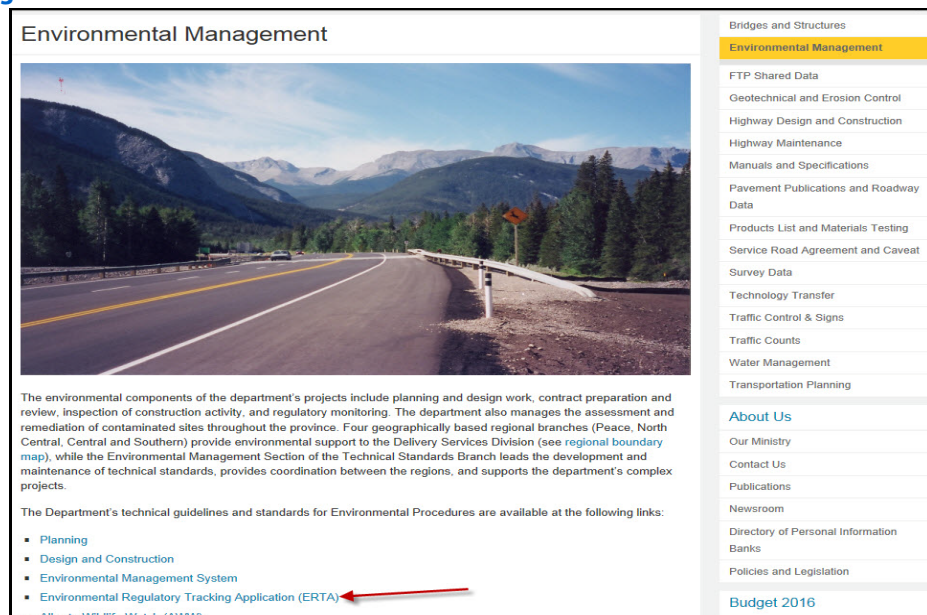
Security Access and Using the ELearning Guide

Before you can use the ERTA application you must have a registered ATU account with security access to ERTA. Once your security access is confirmed, and you complete the registration you will be able to successfully log in to ERTA.

ERTA User Guide

The ERTA User Guide has been developed with embedded tutorials and “How to Activities”. The ‘How to’s’ are general instructions that can be followed any time you perform that task. For the demonstrations you will need a headset and volume turned on.

Figure 0.1 EMS Site - Access ERTA User Guide



See: Refer to Transportations Environmental Management Website to access ERTA Consultant User Guide: <http://www.transportation.alberta.ca/6002.htm>

See: Refer to EMS site to view the **Request Security Access** process.: <http://www.transportation.alberta.ca/6002.htm>

See: To assist with password problems, refer to the [Change or Reset your password](#) link located on the [Transportation Extranet site](#).

Alert! Passwords expire every 90 days. No notification is received prior to the passwords expiring.

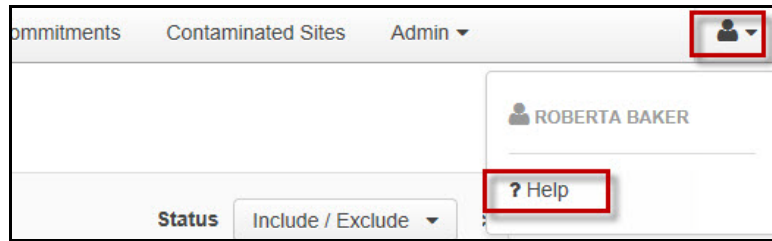
Getting Help with ERTA

The following covers various methods of getting help.

Help on the Web

The first place to go if you have questions about or problems with ERTA, is to the Help Menu.

Figure 0.2 Obtain ERTA Help



The Help link contains a link to user guide(s) and other reference material and online tutorials, if applicable.

The Getting Help using ERTA section contains Names and/or numbers of ERTA contacts around the Province.

Log Out

Logging out of ERTA takes three steps, 1. click on the **X** button, 2. click on the Extranet Infrastructure and Transportation page and click on **Log Out**. Then 3. **Close** the browser window.

Figure 0.3 Logoff ERTA - Application Page

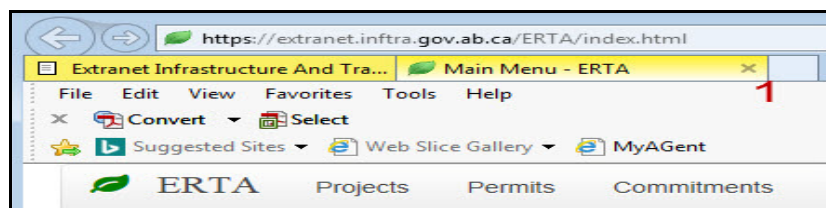
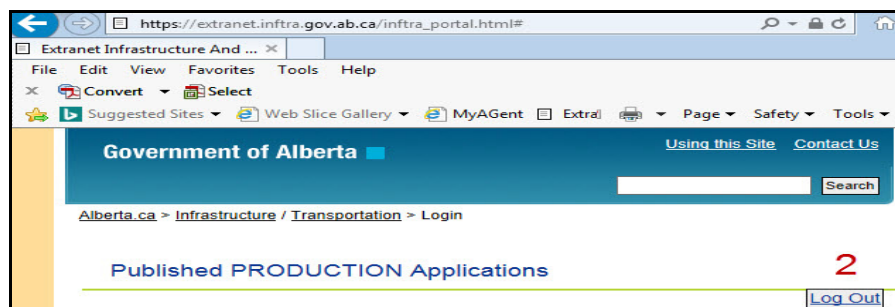


Figure 0.4 Logoff ERTA - Extranet Page



Demo: Login and Log Out

In this demo you will learn how to login and log out of the ERTA application.

Demo 0.1 Logging In and Out of ERTA

The screenshot shows the Government of Alberta website's 'Published PRODUCTION Applications' page. At the top, there is a blue header with the 'Government of Alberta' logo and links for 'Using this Site' and 'Contact Us'. Below the header is a search bar. The main content area is titled 'Published PRODUCTION Applications' and features a 'Demo' button. A 'Log Out' link is visible in the top right corner of the content area. The page lists several applications:

- TIMS**
- AIA**: The TIMS Program requires an inventory of roadway appurtenance assets. The goal of the Appurtenance Inventory Application (AIA) is to "manage basic information about appurtenances" in terms of: location, basic attributes, condition and related roadway.
- BIS**: BIS (Bridge Information System) is a web based application designed to maintain inventory and inspection data for all bridges and bridge related structures in Alberta.
- ERTA**: ERTA (Environmental Regulatory Tracking Application) is a web based application that provides a single centralised database to support Provincial Project Environmental compliance management and document management in Alberta.
- MGMA**: The Municipal Grants Management Application (MGMA) provides the mechanized tools to facilitate the management of the
- Transportation Safety and Other Apps**: Includes 'EIM Livelink Content Server' (powered by Livelink) and 'HDO PRD Highway Data Online'.

How To

1. Open *Internet Explorer*.
2. Navigate to the Alberta Transportation extranet website **https://extranet.inftra.gov.ab.ca/**
3. Enter your registered **UserID** and **password**. Domain is set to ATU.
4. Select the **Login** button.
5. The next screen displayed is the Published Production Applications. Select the **ERTA** link.
6. You are now on the ERTA Main Menu.

Alert! External users close the application tab, click on the Log out link and then close the browser session to end your session in ERTA.

Alert! If you are not a registered user (step 3), you must obtain a registered UserID using the **User Self Registration** link from the <https://extranet.infra.gov.ab.ca/> login page.

Verifying Security Permissions

An information feature in ERTA allows you to verify what permissions you have. Under the Help menu, click on the information icon ‘i’ and the Party Details will display. Scroll the list to see all of your permissions for viewing, adding, deleting, creating and updating.

Figure 0.5 Verify Security Permissions

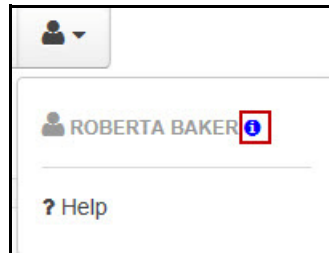
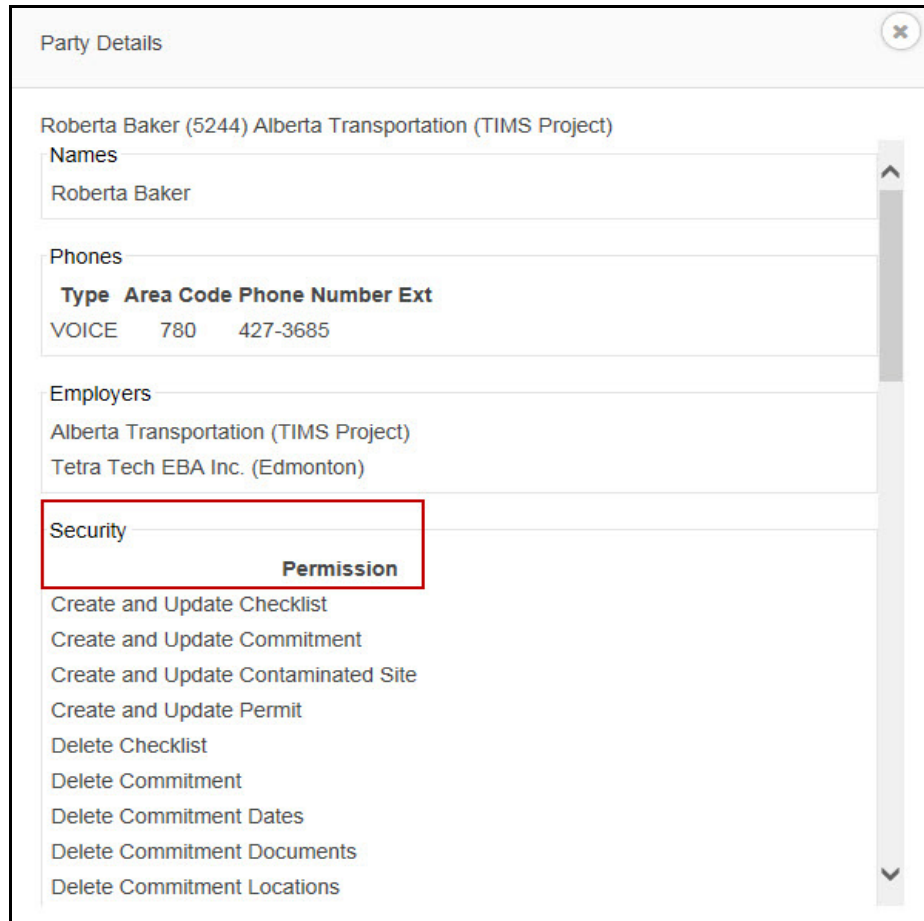


Figure 0.6 View Permission Details



Personal Help

If you cannot find the answer you need on the application's support page, you have various options for getting personal assistance. These are:

- ◆ Assistance with technical problems (see below)
- ◆ Help using the application (see below)

Technical Problems with ERTA

The GOA help desk and they can provide help with technical problems. You can contact them at:

1-888-427-1462

GOA.ServiceDesk@gov.ab.ca

7:00 a.m. to 6:00 p.m.

Monday to Friday

Technical problems include:

- ◆ Application failure or error messages
- ◆ Slow response times
- ◆ Password resets
- ◆ Network problems, such as domain or service availability error messages
- ◆ E-mail notification problems

When you place a support call to the GOA Service Desk, your problem will be logged as a trouble ticket. Be sure to write down the ticket number - you will need it if you want to follow up with the help desk later.

The ticket will be assigned to someone with the appropriate expertise, who will call you to gather further information, provide a solution or discuss a plan for resolution of the issue.

Help using the Application

For help using ERTA, contact your Regional Environmental Coordinator (REC).

On Line Help using the Application

Under the 'People' Icon the ERTA [Help](#) link contains a link to user guide(s) and other reference material and online tutorials, if applicable.

Concerns about ERTA Data

If there are questions around how to enter ERTA data contact your Regional Environmental Coordinator who will be your first, line of support.

Suggestions for Improvement to ERTA

If you have a suggestion that would improve ERTA, please forward your comments/suggestions to the Transportation Director, Environmental Management Services, Technical Standards Branch. Your suggestions will be evaluated and may be implemented in a future release.

Environmental Regulatory Tracking Application

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Chapter 1: Introduction of ERTA

This introductory chapter provides some background regarding the Environmental Regulatory Tracking Application (ERTA).

Topics in Chapter:

1. Background
2. What is ERTA?
3. Who uses ERTA?
4. What Data is in ERTA?
5. Consultant and Data Security
6. Data Structure
7. Expected Project Deliverables

Background

Alberta Transportation has responsibility for the Province's extensive roadway network and water management infrastructure, including, but not limited to, highways, bridges, culverts, ferries, dams, reservoirs and canals. The Environmental Management Services (EMS) section oversees environmental assessment and environmental components of major and complex transportation and water management projects.

The Department has a business goal of providing safe, efficient and sustainable transportation and water management infrastructure through effective planning, design, construction, rehabilitation, operation, maintenance and decommissioning.

Transportations Role

The environmental components of the department's projects include planning and design work, contract preparation and review, inspection of construction activity, and regulatory monitoring.

- ◆ The department manages the assessment and remediation of contaminated sites throughout the province.
- ◆ Four geographically based regional branches (Peace, North Central, Central and Southern) provide environmental support to the Delivery Services Division (see regional boundary map),
- ◆ The Environmental Management Section of the Technical Standards Branch leads the development and maintenance of technical standards, provides coordination between the regions, and supports the department's complex projects.

Consultants Role

As Service Providers (individuals and companies contracted by Alberta Transportation), consultants and contractors play an integral role in assisting the Department in fulfilling its commitment to environmental protection.

Environmental Management System (EMS)

An EMS is an organized and formal approach to managing environmental issues with the goal of making environmental considerations part of daily activities. At its core, the purpose of the EMS is to identify and responsibly manage the potential environmental impacts of the Department's activities and projects.

The Environmental Management system applies to Alberta Transportation employees and consultants and contractors contracted by Alberta Transportation (collectively as Service Providers).

Federal & Provincial Environmental Regulations

Alberta Transportation construction projects often require adherence to federal & provincial environmental regulations. These Regulations are in the form of Approvals and Authorizations (Permits) issued to the Department which allow construction activity to proceed.

These Permits often require long term monitoring of Commitments by the Department. It is common for a Project to require several of these

Permits and the Department must have all pertinent Permits in place prior to construction.

What is ERTA?

The Environmental Regulatory Tracking Application (ERTA) is an application that supports the federal & provincial environmental regulations during the Life Cycle of an Alberta Transportation construction project. ERTA will assist in managing compliance with Environmental Regulations by the tracking of Commitments and Permits.

ERTA also acts as a repository for contaminated sites that are the responsibility of the Government and/or may impact the Governments business.

Hint: The ERTA system has functionality that allows for searching for PMA projects and linking the commitment, contaminated site and/or permit to the associated PMA Delivery Project.

See: Consultants are to refer to Alberta Transportation website and the Environmental Management System (EMS) Manual and associated Regulatory Framework documents. <http://www.transportation.alberta.ca/571.htm>. Once on the site, click on the Environmental Management System, Environmental Management System & Regulatory Framework.

Alert! Consultants through external access will be responsible for the creation and updating of ERTA and uploading of all related documentation as it pertains to permits and commitments.

Who Uses ERTA?

Regulatory tracking management is an Alberta Transportation Delivery Services; and Environmental Management Services (EMS) responsibility with support from Highway Maintenance Contractors and Service Providers.

The implementation of ERTA does not make any organizational change in the roles & responsibilities for the management of Consultants and Alberta Transportation staff roles.

The business users that will be involved in the usage of the ERTA System are:

- Employed by Alberta Transportation
 - Regional Environmental Coordinator(s) (REC)
 - Environmental Management Services (EMS)
 - Regional Project Administrators
 - Operations Staff
- Employed by the Engineering Consultant
 - Environmental Consultant (Employee)
 - Sub-Consultant
- Contaminated Sites:
 - Highway Maintenance Contractors responsible for highway maintenance yards.
 - Regional Environmental Consultant responsible for releases/spills on right of way and 3rd party.
 - EMS Consultants responsible for legacy contaminated sites.
 - EMS Highway Maintenance Yard (HMY) Auditor - responsible for Environmental Management Plan.

Hint: To request security access or address issues with security access, contact it.services@gov.ab.ca.

Hint: Legacy contaminated sites are sites that are currently or have in the past been owned by GoA.

Security and Use of Information

When accessing the ERTA application, the clause that is in the consultant contract applies in the use of Alberta Transportations ERTA application. This includes the following

The consultant shall take appropriate measures to ensure that the security of the Government's computer systems and electronic data is maintained. The consultant shall be liable for any damage to the Government's computer systems or electronic data from inadequate

security measures or from any act or omission on the part of the consultant or any of his employees or agents.

The consultant may not make use of the system, system data, inspection data, or any other property of the Department or Local road authorities for any purpose other than for the delivery of the work under this assignment.

What Data is in ERTA?

The ERTA application functionality allows for the record management of Permits and Commitments, and associated project documents. Automated notifications are sent to Transportation Project Administrators or Regional Environmental coordinators when critical milestone dates are being approached.

The ERTA system is an application that allows proactive data management. Data will be captured as it associates to the life cycle management listed below.

- ◆ Permit Scoping & Identification;
- ◆ Permit acquisition;
- ◆ Compliance management;
- ◆ Amendment management;
- ◆ Contaminated Sites;
- ◆ Document Management; and
- ◆ Post Construction Commitment Delivery

In future releases of the ERTA Application, the following enhancements are under consideration:

- ◆ Incorporate the Regulatory Framework Checklist for all Consultants to access.
- ◆ Provide Alberta Transportation map based reporting for contaminated Sites and Regulatory Permits and Commitments.

Consultant and Data Security

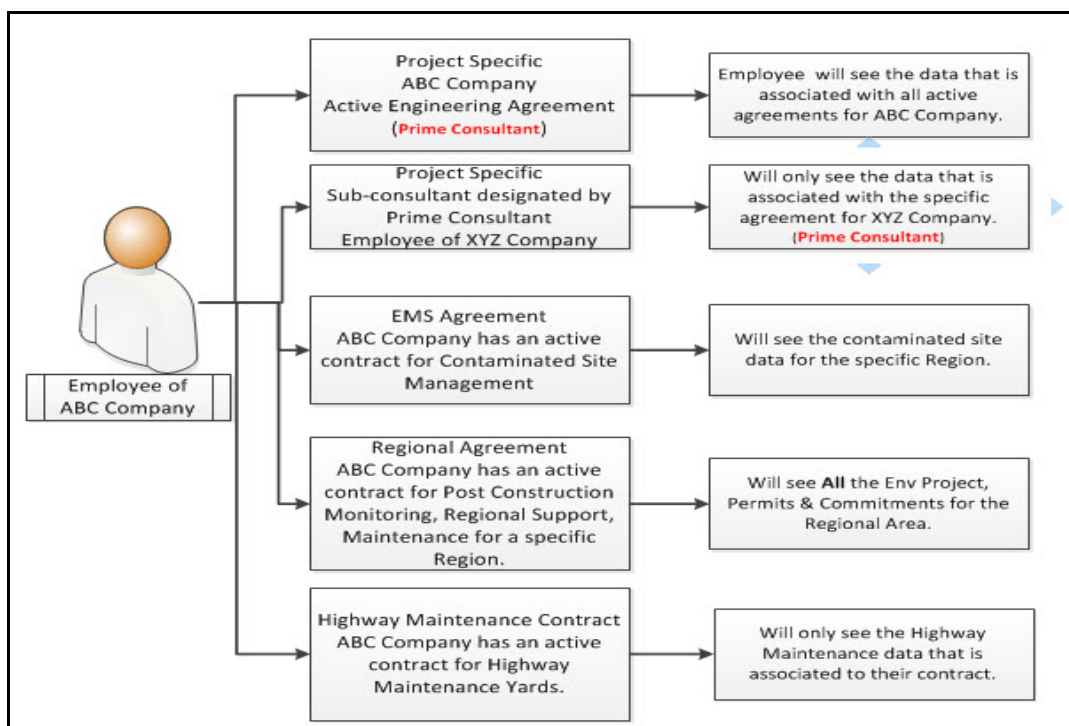
When entering and viewing data there are two components that are addressed.

1. Security (who sees what)
2. How to organize data being entered.

Security

The data that the consultant will see is dependent on their relationship to the Prime Consultant and the specific consultant agreement(s). The figure below depicts the relationship of employee vs a sub-consultant.

Figure 1.1 Security - Prime Consultant, Employee and Sub-consultant Relationships



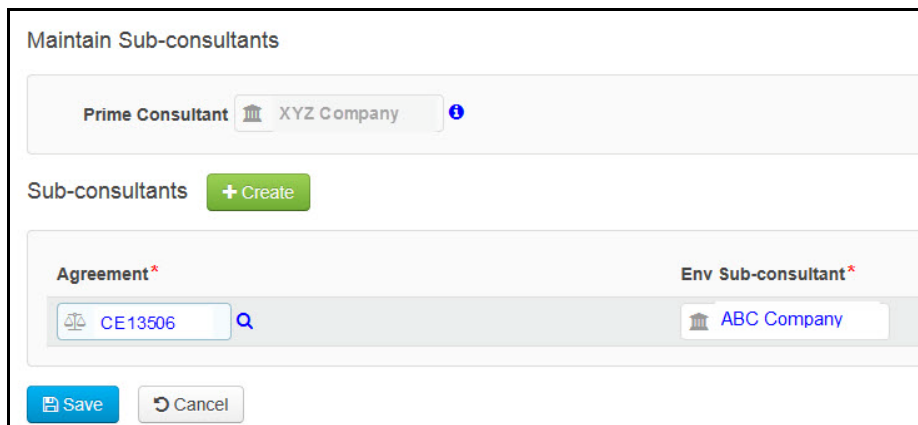
Alert! XYZ Company (Prime Consultant) may sub-contract the environmental work to ABC Company. XYZ Company as the Prime Consultant must setup the sub-consultant relationship.

Alert! A consultant applies for their ATU account and security access to ERTA as “External Data Entry”. This is approved by an authorized Transportation employee.



Prime Consultant and Sub- Consultant


The Prime Consultant will use the *Admin, Maintain Sub-Consultants* menu to add the sub-consultant relationship(s) for the consultant responsible for managing the Environmental components of their project. Enter the Prime Consultant, click on the **Create** button.

Figure 1.2 Maintain Sub-Consultant - Prime Consultant Specifies Based on Agreement








Maintain Sub-consultants

Prime Consultant  XYZ Company 

Sub-consultants 

Agreement* Env Sub-consultant*

 CE13506   ABC Company

Alert! The sub-consultant will only see the data that is associated with the specific agreement for XYZ Company.

Alert! Consultants responsible for Environmental Projects will have **‘view only’** capabilities of related projects and contaminated site content that lies within the proximity of the set buffer distance of their project.

Regional Consultants

In addition to having consultants and sub-consultants that manage environmental projects, ERTA also has HMY Consultants that manage contaminated sites.

ERTA supports regional assignments allowing for security to be granted to consultants who manage various portfolios.

For example, the EMS HMY - Consultant A monitors the legacy Maintenance Yards, and Regional Environmental Consultant - B monitors Right of Way Spills Capital Related and 3rd party Contamination type sites and/or performs Post Construction monitoring.

Figure 1.3 Maintain Regional Consultant - Transportation Staff Specifies Based on Agreement

Agreement*	Consultant	Region*	Contaminated Site Types	Post Const.	REC Support	
CON0014408	ABC Company	NORTH CENTRAL REGION	7 items selected	<input type="checkbox"/>	<input type="checkbox"/>	
CON0016627	XYZ Company	NORTH CENTRAL REGION				
CON0015553	Associated RB Company	SOUTHERN REGION				
CON0015554	Total Quality Company	CENTRAL REGION				
CON0015556	Engineering Associates	NORTH CENTRAL REGION				

Contaminated Site Types

ALL NONE

- Maintenance Yard - Never GOA o...
- Maintenance Yard - GOA ownersh...
- Maintenance Yard - Shared GOA ...
- Right of Way spill
- Capital Related
- Property Acquisition
- Property Disposal
- 3rd Party Contamination
- Provincial Government Owned

See: Transportation staff (REC/EMS) will use the *Admin, Maintain Regional Consultants* menu to setup data access for contaminated site, post construction monitoring and Regional support. Refer to the ERTA Administration Guide.

Alert! As long as the agreement is active, the Regional Consultant(s) will have edit and view access to all content on the contaminated site.

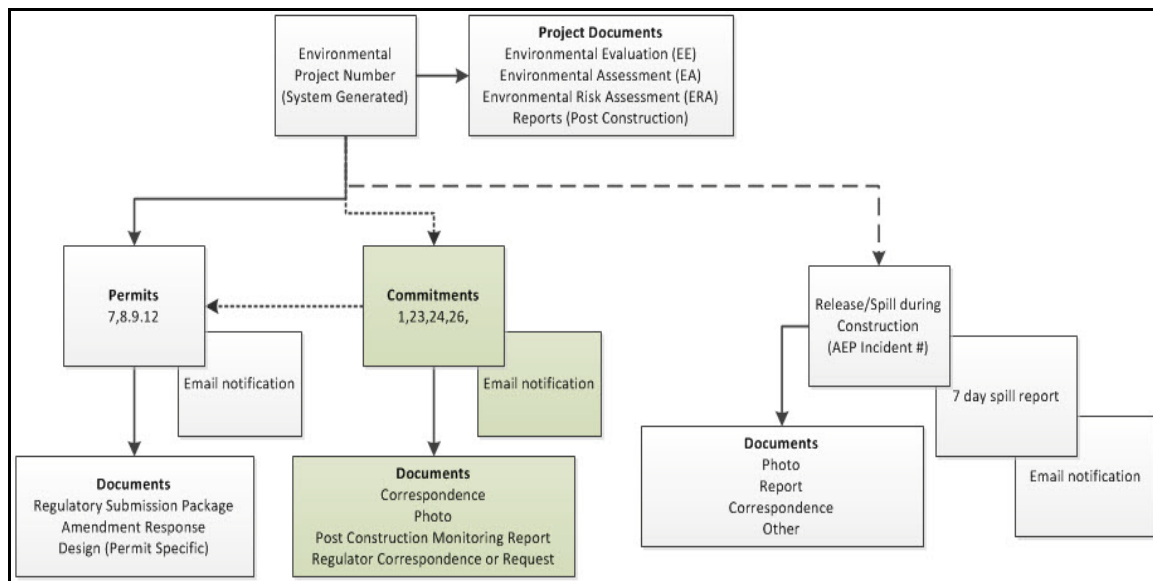
See: For more detailed information on Contaminated sites refer to Managing Regional Consultants Section.

Data Structure

Environmental projects are created by the consultant and may also be associated to the tenders that currently define the consulting agreement.

ERTA uses an Environmental Project Number (system generated) to organize, permits, commitments and all associated documents. A Release/Spill can be linked to an environmental project but it is not mandatory by the system.

Figure 1.4 Organize data by Environmental Project Number



Alert! A Permit must be linked to an Environmental Project.

Alert! Commitments must be linked to either an environmental project OR a permit, but not both.

Alert! A Release/Spill commitment does not have to be linked to the project, however the option is there to link to a project if required.

See: See 'Chapter 3: Projects' for more details on Environmental Projects.

Expected Project Deliverables

The main deliverables for the Environmental Project Life Cycle are:

- ◆ Environmental Assessment (EA)
- ◆ Environmental Evaluation (EE)
- ◆ Environmental Risk Assessment (ERA)
- ◆ Application Package
- ◆ Preliminary Engineering and Detailed Design
- ◆ Environmental Construction Operation Plan (ECO Plan)
- ◆ Construction compliance/monitoring reports and post construction monitoring reports

Alert! This is not an inclusive list of deliverables, this is a sample of the types of deliverables that can be expected on a project and would be uploaded into ERTA.

See: Refer to the **Environmental Construction Operations (ECO) Plan Framework** for more information preparing ECO Plans for Alberta Transportation during Design and Construction Phase. <http://www.transportation.alberta.ca/Content/docType245/Production/2016ECOPlanFramework.pdf>

Chapter 2: ERTA Screens

This chapter provides an overview of the screens and menus that are relevant to Environmental Regulatory Tracking Application (ERTA).

Topics in Chapter:

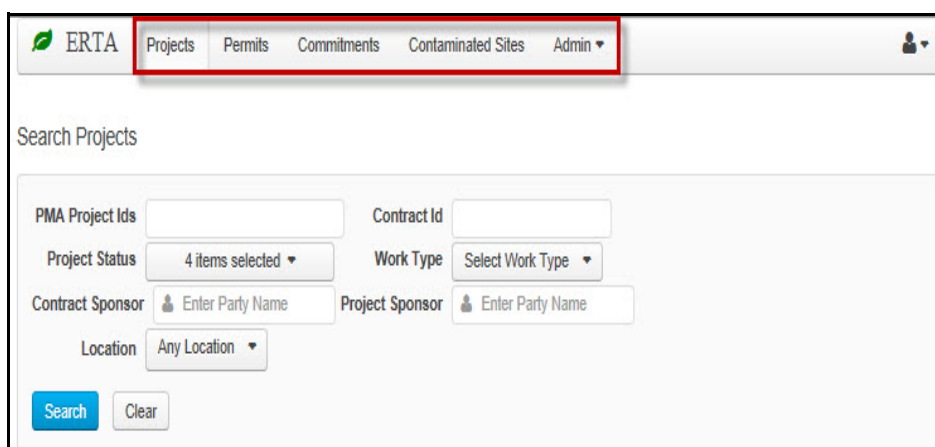
1. ERTA Main Screen
2. Basic Functionality
3. Module Search Screens
4. General System Information,
5. System Messages and Notifications

ERTA Main Screen

Data is recorded in the ERTA system by the user engaged during the planning, design, construction and post construction phases of a project.

This section of the manual is a general overview of basic screen functionality, fields, and visual indicators on the ERTA screens. There are basic search and navigation functionality that is similar on all the screens that is documented in this section. Also included is general system information such as deleting content, inputting of milestone dates and samples of notification emails.

Figure 2.1 ERTA Modules



Access ERTA’s main functions using:

- ◆ The five (5) Modules along side the ERTA label:
 - Projects
 - Permits
 - Commitments
 - Contaminated Sites
 - Admin

Table 2.1 Main Menu - Modules

Module	Description
Projects	The ability to edit, search or create Environmental Projects and edit, search, create the Permits and Commitments linked to a specific PMA project.
Permits	The ability to edit, search or create a new Permit.

Table 2.1 Main Menu - Modules

Module	Description
Commitments	The ability to edit, search or create a new Commitment.
Contaminated Sites	The ability to edit, search and create new Contaminated Sites.
Administration	Links to maintenance functions for: <ul style="list-style-type: none">◆ Bulk Update, Maintain Scoring Test<ul style="list-style-type: none">▪ Not available with Consultant Role, Only available with the REC/EMS Role◆ Maintain Region Administrator (Administrator role)◆ Maintain Sub-Consultants (Consultant role)◆ Maintain Regional Consultants (REC/EMS role)◆ Maintain Application Parameters (Administrator role)

Basic Functionality

ERTA has standard functionality on all screens. When navigating from module to module the main screen is always a search screen where you can search, edit or create a new item.

Tabs and Buttons

There are common functions within each module:

- ◆ Buttons that allow you to Edit, Create, Request Delete.
- ◆ Tabs that link you to: Locations, Documents, 'Related Projects, Permits, Commitments & Sites', Completed Environmental Projects and History.

In addition to these are milestone dates, and Wells (in contaminated sites) entries.

Figure 2.2 View Environmental Project Screen - Tabs

The screenshot shows the 'View Environmental Project' screen. At the top, there is a search bar and three buttons: 'Edit', '+ Create', and 'Request Delete'. Below this is a navigation bar with tabs: 'Project' (selected), 'Locations', 'Documents', 'Rel Projects, Permits, Commitments & Sites', 'Completed Env. Projects', and 'History'. The main content area displays details for 'Env Project # 3'. It includes a 'Phase' dropdown set to 'Planning', a 'Town' dropdown, a 'CMA' dropdown, a 'District' dropdown set to 'FORT MCMURRAY', and a 'Region' dropdown set to 'FORT MCMURRAY R...'. On the right side, there are checkboxes for 'AT Administrator' (checked, Tom Smith), 'REC/EMS Contact*' (Darren Jones), and 'Project Sponsor' (checked, David Jackson). At the bottom, there is a 'Consultants' table with columns for 'Active', 'Consultant', 'Agreement', and 'Added By'.

Table 2.2 Project - Tabs

Item	Description
Edit	Allows you to edit the record.
Create	Allows you to create a new record.
Request Delete	Allows you to request a record be deleted. Only the REC can confirm the deletion of the record.
Project, Permit, Commitment, Contaminated Site	Main page that allows for details on the project, standard description field, and location description (project pulls from Tender descriptions) and contact information. You have the standard set of buttons: Edit, Create and Request Delete.
Locations	The locations tab appears in all modules and identifies locations based on Legal Land Location (LLL), Linear Referencing System (LRS), Universal Transverse Mercator (UTM), Structure, Intersection of the module that you are viewing. These locations will be used when future mapping functionality is made available in ERTA.
Documents	The ability to create, update, delete and view/hide all documents associated to the project, permits and commitment documents.

Table 2.2 Project - Tabs

Item	Description
Rel Projects, Permits, Commitments & Sites	The ability to view all related Projects, Permits, Commitments and Contaminated Sites due to their proximity defined within a specific system default. This default can be changed by the ERTA Administrator and overridden by consultants on differed commitments and contaminated sites.
Completed Env. Projects	The ability to view all completed environmental projects that fall within proximity of the new environmental project. Completed projects may provide valuable information on environmental issues and remediation on past projects.
History	The ability to view all changes that are made in the module.
Dates	Permits and Commitments will have milestone dates.
Wells	Contaminated Sites allows for the tracking of wells.

Alert! The Tabs displayed depend on what module you are viewing.

Selecting Values

When you enter a part of a value, a drop list will appear, you must select the appropriate value from the drop list before selecting the appropriate button such as 'Create'.

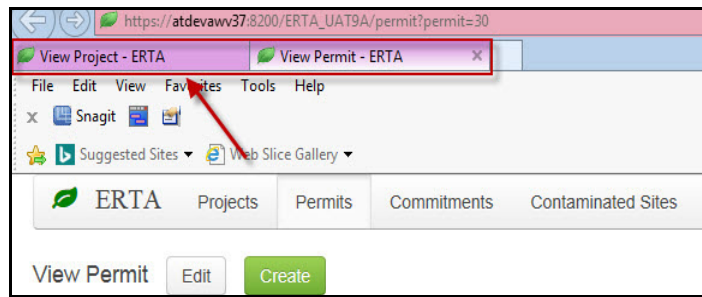
Figure 2.3 Select Values from List

Navigate back to Search Result

There are two different ways to navigate back to the search results screen.

Figure 2.4 Return to Previous Search Results using a Link

Figure 2.5 Return to Previous Search Results using a Tab



Alert! Not in all cases will you see a [Search Projects](#) link. In some instances you will have a separate window open. Click on the Application tab in Internet Explorer to return to your search results.

Visual Indicators

There are special icons or visual markers that draw your attention for viewing additional information. Mandatory fields are identified with a red (*) asterisk. The **(i)** Information Icon will provide more information on the field.

Figure 2.6 Display Contact Information for REC/EMS

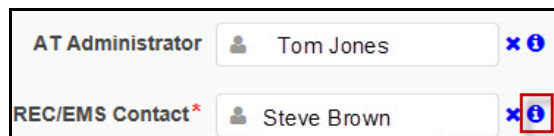
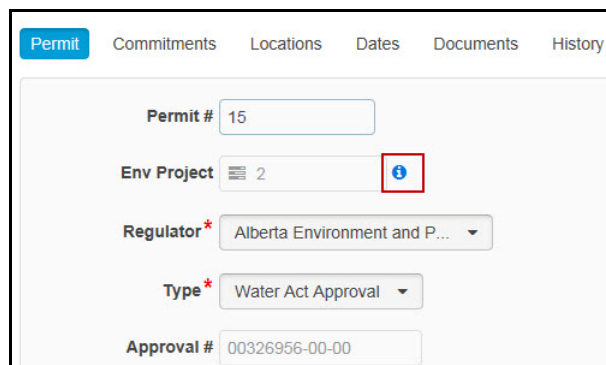


Figure 2.7 Display Additional Information on Env Project



Hint: Need to know who to contact? Need more information on the Environmental Project, click on the information 'i' icon next

to the field.

Alert! Information on Contract details are only viewable to those who have the appropriate security access to PMA.

The People icon gives a visual on internal vs external users and organizational (groups). The People icon with the X is for an external consultant.

Figure 2.8 Internal Versus External User

Figure 2.9 Organization Units (a Group)

Hint: To clear fields use the 'X' button.

Figure 2.10 Auto Populating of fields

Hint: If you have selected an incorrect region, use the 'X' button to clear the REC/EMS contact field and then reselect the region. The Contact field will repopulate with the correct name.

Figure 2.11 Character Counter for fields over 30 characters

Module Search Screens

The first screen you see in each module of Projects, Permits, Commitments and Contaminated Sites, is the search screen.

The **Search** button functions the same in each module, when selected it conducts the search using your search criteria and the **Clear** button resets the search criteria fields.

Above each search area, the **Create** button allows you to create a new record. The search results will display below the search screen.

Search Screen

On the Search screen you enter the criteria required to filter the data and click on the **Search** Button. There are **Status** default parameters (Included/Exclude) that effect the search results.

Figure 2.12 A Search Screen

The screenshot shows the 'Search Commitments' interface. At the top left, there is a 'Search Commitments' header with a '+ Create' button. The search form includes several input fields and filters: 'Commitment Id', 'AEP Incident #', 'Consultant' (with a dropdown and search icon), 'Due Date' (with a date range selector from 2015-12-31 to 2015-12-31), and 'Location' (with a dropdown and 'Limit to Deleted' checkbox). On the right side, there are filters for 'Status' (3 items selected), 'Release/Spill' (radio buttons for Any, Yes, No), 'Agreement #' (with a search icon), 'REC/EMS Contact', 'AT Administrator', 'Env Project', and 'Permit #' (all with search icons). Below the search form are 'Search' and 'Clear' buttons. Underneath the search form, it says 'Matching Commitments 18' with a download icon. The results are displayed in a table with the following data:

Commit. # / AEP #	Commitment Description	Status	REC/EMS Contact	Consultants	Due Date	Location Description
2	Post-Construction monitoring reporting to DFO for fish habit...	In Progress	Tom Smith	Engineering Associates	31-Oct-2016	BF 75731, Hwy 6...
7	Post Construction Monitoring Fish Sampling, BF 75731 (2016)	In Progress	Tom Smith	Engineering Associates	31-Oct-2016	BF 75731 Hwy 63...

Hint: The ERTA Search Screen functionality allows the creation of a new item by using the **Create** button.

Hint: The search screen will accept the wildcard (*) asterisk in some of the fields such as: Commitment ID, and AEP Incident #, Permit #, Approval #, Envi Project #; fill in the appropriate fields and click the **Search** button.

Alert! For performance reasons, ERTA has a 1000 row limit for search results. This limit can be adjusted by the ERTA Administrator.

Figure 2.13 Projects Search Result Screen

Search Environmental Projects

View Environmental Project Edit + Create Request Delete

Project Locations Documents **Rel Projects, Permits, Commitments & Sites** Completed Env. Projects History

Env Project # 13 Phase Planning Location Des

Export All Download

Matching Permits **2** Create Download

Permit #	Permit Description	Permit Type	Status	REC/EMS Contact	Consultant
25	Fake Nav waters	Navigable Waters Approval	In Progress	Tom Smith	XYZ Compar
26	Test Permit	DFO Self Assessment	In Progress	Tom Smith	XYZ Compar

Matching Commitments **2** Create Download

Commit. # / AEP #	Def. Included?	Commitment Description	Status	REC/EMS Contact	Consul
21		test again.	In Progress	Tom Smith	XYZ Com
23		fake commitment	In Progress	Tom Smith	XYZ Com

Matching Contaminated Sites **6** Download

Hint: Search results for Environmental Projects shows all matching permits commitments and contaminated sites associated to the Project.

Hint: Use the **Export** button next to the Create button to **export** the search results to Excel. There will be two sheets, one with the search criteria, a second sheet that contains the exported results of the search items; projects, permits, commitments and contaminated sites.

Searching Status Defaults (Include/Exclude)

Sometimes the search results do not return what you expect, the default search parameters on the Status (include/exclude) field is the cause.

Each module has default status parameters selected that include and exclude a status when searching for projects, permits, commitments, and contaminated sites. A completed project may not appear in the search results as the status would not have been set to completed. See the following examples.

Figure 2.14 Permits Status Field (Include/Exclude)

Figure 2.15 Project Default Status Search (Include/Exclude)

Hint: Once a search is complete, you can use the [Search Environmental Projects](#) link to return to your search results screen and select a different permit or commitment.

Projects Search Screen

All of the fields for the Projects screen are listed below. The other modules search screens have the same as well as additional fields that relate specifically to that module.

In Projects the search results display all permits, commitments and contaminated sites linked to an Environmental Project number and/or Agreement #. The matching Commitments, Permits and contaminated sites will display below the search area. Project documents not related to a permit or commitment can also be uploaded and associated to the Environmental Project.

Figure 2.16 Environment Project Search Screen - Fields

The screenshot shows the 'Search Environmental Projects' interface. At the top left, there is a search bar and a '+ Create' button. Below this, there are several input fields and filters:

- Env Project #**: A text input field.
- Consultant**: A dropdown menu with a person icon and the text 'Enter Party Name'.
- PMA Project #**: A text input field with a magnifying glass icon and the text 'Enter PRJxxxx'.
- Location**: A dropdown menu with a location pin icon and the text 'Any Location'. Below it is a checkbox labeled 'Limit to Deleted'.
- Phase**: A dropdown menu with the text '4 items selected'.
- Agreement**: A text input field with a magnifying glass icon and the text 'Enter Contract B'.
- PMA Work Activity**: A text input field with a magnifying glass icon and the text 'Enter WA Bus Id'.
- REC/EMS Contact**: A dropdown menu with a person icon and the text 'Enter Party Name'.
- AT Administrator**: A dropdown menu with a person icon and the text 'Enter Party Name'.
- Project Sponsor**: A dropdown menu with a person icon and the text 'Enter Party Name'.

 At the bottom left, there are two buttons: 'Search' and 'Clear'.

Table 2.3 Environmental Project Search Screen - Field Definitions.

Item	Description
Env Project #	Used to search for the auto generated Environmental Project Number. Environmental projects are based on the consulting agreement work is being completed under.
Phase	Used to search for the project phase, planning, design, construction, and post-construction. The default parameters are set to all 4 phases being selected.
REC/EMS Contact	Used to search for the Contact for the Environmental Project work being completed.
Consultant	Used to search for the engineering company that is managing the environmental component of the project.
Agreement	Used to search for engineering agreement number that the environmental work is being completed under: e.g. CON0012506 or CE13456
AT Administrator	Used to search for the AT Administrator. Automatically obtained from PMA Delivery when tenders associated to the agreement.
PMA Project #	Used to search for the PMA Project Number e.g. PRJ0001054. Projects in PMA bundle together a number of work activities that are delivered together as part of a single contract.
PMA Work Activity	Used to search for the PMA work activities that are associated to the environmental component of the project. The AT Administrator is associated to the PMA work activities.

Table 2.3 Environmental Project Search Screen - Field Definitions.

Item	Description
Project Sponsor	Used to search for the Transportation person that will be the sponsor on a contract. This person is responsible for the delivery of the project.
Location	Used to search for the assigned location: Legal Land Location, LRS, CMA, Structure, Intersection, District or Region.
Limit to Deleted	Used to search for deleted projects, permits, commitments and contaminated sites. Only administrators with appropriate security will be allowed to view results for this search criteria. All other users will NOT see search results.
Search (button)	Conducts the search using the criteria specified in the fields.
Clear (button)	Reset all search criteria fields.

Figure 2.17 Environmental Project Search Screen - Results

The screenshot shows a search interface with a 'Search' button and a 'Clear' button. Below the buttons, it indicates 'Matching Environmental Projects 14' with a download icon. A table displays the results with columns for Env Project, Env Project Desc, Phase, REC/EMS Contact, and Consultants.

Env Project	Env Project Desc	Phase	REC/EMS Contact	Consultants
1	63:2,4: S of Wandering River - Wandering...	Planning	Tom Smith	Engineering Assoc
2	63:2,4: S of Wandering River - Wandering...	Planning	Tom Smith	Engineering Assoc
3	63:2,4: S of Wandering River - Wandering...	Planning	Tom Smith	Engineering Assoc

Hint: When searching for Projects, security verification is happening between the ERTA system and the PMA System. So search results may take a bit longer than expected.

Hint: Only one project may be associated with a Permit or Commitment.

Alert! Consultants and Transportation staff have the ability to add more than one active consultant to a project, permit or commitment.

Permits Search Screen

Permits are recorded in the ERTA system by the Environmental consultants engaged during the planning, design, construction and post construction phases of a project.

The Permits search screen works similar to the Projects search screen. The process is the same, you enter the search criteria and click on the **Search** button.

Searching for the permit will display all the commitments attached to the permit. To search for all permits related to a project, enter in the **Environmental Project #**.

Figure 2.18 Permits Search Screen

Table 2.4 Permits Search Screen

Link	Description
Permit #	Used to search for the System Generated Permit number.
Approval #	Used to search for the Approval # assigned as part of the Permit approval process.
Regulator	Used to search for the Regulatory agency that approves permits.
Due Date	Used to Search for either a permit or milestones due date by selecting a date range.

Alert! Only the fields that are different are defined on this screen.

See: See *“Environment Project Search Screen - Fields”* on page 2-11 for additional information.

Figure 2.19 Permits Status Field (Include/Exclude)

The screenshot displays a web interface for filtering permits by status. At the top, there is a label 'Status' followed by a dropdown menu currently showing 'Include / Exclude'. Below this, the interface is split into two columns: 'INCLUDE WITH STATUS' on the left and 'EXCLUDE WITH STATUS' on the right. Each column contains a list of status options with checkboxes. In the 'INCLUDE WITH STATUS' column, the checkboxes for 'In Progress', 'Submitted', 'Issued (Permit, LOA or State...', 'Amendment Pending', and 'Completed' are checked, while 'Cancelled' is not. In the 'EXCLUDE WITH STATUS' column, the checkboxes for 'Cancelled' and 'Completed' are checked, while 'In Progress', 'Submitted', and 'Issued (Permit, LOA or State...' are not.

INCLUDE WITH STATUS	EXCLUDE WITH STATUS
<input checked="" type="checkbox"/> In Progress	<input type="checkbox"/> In Progress
<input checked="" type="checkbox"/> Submitted	<input type="checkbox"/> Submitted
<input checked="" type="checkbox"/> Issued (Permit, LOA or State...	<input type="checkbox"/> Issued (Permit, LOA or State...
<input type="checkbox"/> Cancelled	<input checked="" type="checkbox"/> Cancelled
<input checked="" type="checkbox"/> Amendment Pending	<input type="checkbox"/> Amendment Pending
<input type="checkbox"/> Completed	<input checked="" type="checkbox"/> Completed

Commitments Search Screen

Commitments recorded in ERTA must be linked to either an environmental project or a permit, but not to both. A Release Spill commitment does not have to be linked to the project, but the option is there if required.

Figure 2.20 Commitments Search Screen

Table 2.5 Commitments Search Screen - field definitions

Link	Description
Commitment ID	Used to search for the System Generate unique identifier.
AEP Incident #	Used to search for the Alberta and Environment and Parks (AEP) Reference Number. This number is obtained from the Coordination Information Center (CIC).
Release/Spill?	Used to display Commitments related to a release or spill that occurred during construction.

Alert! Commitments are used to record environmental commitments. This includes commitments related to releases and spills.

See: See *“Environment Project Search Screen - Fields”* on page 2-11 for additional information.

Figure 2.21 Commitments Status (Include/Exclude)

Table 2.6 Commitments Status field definitions

Link	Description
In Progress	Commitment has been logged and is actively being managed.
Reviewed	If the Commitment requires a report to be generated a submission to Transportation and following a review must be logged.
Submitted	If a submission to a regulator is required for a Commitment.
Cancelled	The Commitment is no longer required due to a change in project or negotiated amendment. Not intended for Commitments that have been delayed but the department still intends on delivering at a future point.
Completed	Used when the Commitment has been satisfied
No Further Action	Only used when under a review and there is no required need to proceed. i.e. conditions have been met, however, no document or submission is required. Rational must be provided.

Contaminated Sites Search Screen

All of the fields for Contaminated Sites are listed below. The other module search screens have the same as well as additional fields that relate specifically to that module.

Figure 2.22 Contaminated Sites Search Screen

Table 2.7 Commitments Search Screen - field definitions

Link	Description
Site #	Used to search by the Site Number.
Site Status	You can include and exclude a site status during a search. e.g. Phase 1 ESA, Phase II ESA, Risk Management, Cancelled.
Type	Used to search for a specific type of site. e.g. Maintenance Yard - GOA owned, Right of way spill, Provincial Government Owned.
Site Name	Used to search by Site Name.
Owner	Used to search for the Owner.
Insurance	Used to search for the Insurance Company of whom caused the contamination.

Alert! A Contaminated Site describes a location that has contamination near a provincial right of way or on a maintenance yard.

Hint: Contaminated sites mitigated as part of future project scope will be marked by consultant as deferred.

See: See *“Environment Project Search Screen - Fields”* on page 2-11 for additional information.

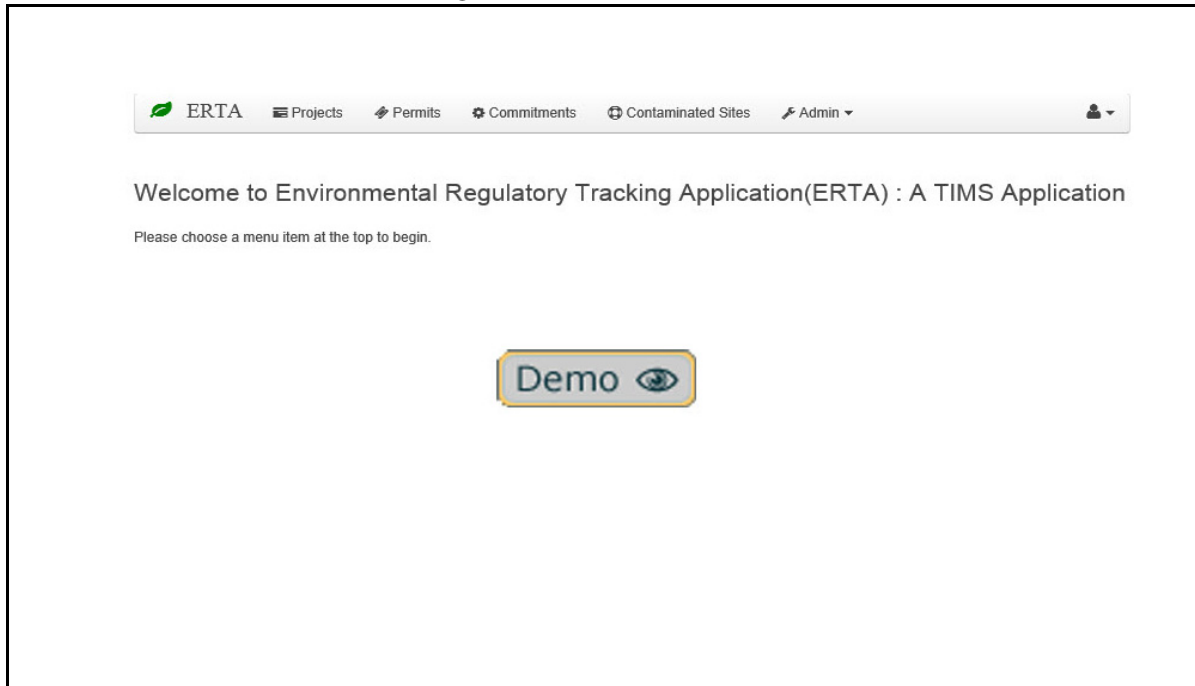
Figure 2.23 Contaminated Site Status (Include/Exclude)

INCLUDE	EXCLUDE
<input checked="" type="checkbox"/> Phase 1 ESA	<input type="checkbox"/> Phase 1 ESA
<input checked="" type="checkbox"/> Phase II ESA	<input type="checkbox"/> Phase II ESA
<input checked="" type="checkbox"/> Supplemental Phase II Delineat...	<input type="checkbox"/> Supplemental Phase II Delineat...
<input checked="" type="checkbox"/> Remediation	<input type="checkbox"/> Remediation
<input checked="" type="checkbox"/> Monitoring	<input type="checkbox"/> Monitoring
<input checked="" type="checkbox"/> Risk Management	<input type="checkbox"/> Risk Management
<input checked="" type="checkbox"/> Remediation Certificate	<input type="checkbox"/> Remediation Certificate
<input type="checkbox"/> No Contamination Found	<input checked="" type="checkbox"/> No Contamination Found

Demo Search

Searching in ERTA is easy. Fill in the search fields with the appropriate criteria, remember you can use the wildcard (*) for text fields and then press the **Search** button.

Demo 2.1 Searching in ERTA



How To

1. Select the *ERTA Module* you want to search, e.g. Project, Permits, Commitments, Contaminate Sites or Projects.
2. From the search screen, enter criteria required to find the information on your selected item, a permit, a commitment, contaminated site, a project etc.
3. Select the **Search** button.
4. Scroll down to the search results, and click the associated link to open the selected item.
5. When you click on the associated link it will display more details on the selected item.
6. From the View screen select the **Edit, Create or Request Delete** Button.
7. Make appropriate changes or edits.
8. Select the **Save** button.

Alert! The system will display an error message if search results exceed the system default. Choose other search criteria to further limit the search results.

General System Information

A consultant can delete individual documents, locations or milestones they have uploaded/created. Navigate to the item, enter the edit mode and then use the associated delete function.

The Regional Environmental Coordinator (REC) or the Environmental Management Services (EMS) Contact can delete anything a consultant has created/uploaded as well as the entire record and the associated data, dates, location, and documents.

Deleting Permits, Commitments and Contaminated Sites

If a record has been added that needs to be deleted the consultant can mark the record for deletion by using the **Request Delete** button. The REC will process the deletion of the record.

Figure 2.24 Request Deletion of a Record

The screenshot shows a web interface for managing permits. At the top, there is a 'Search Permits' link and a 'View Permit' button. To the right of 'View Permit' are three buttons: 'Edit' (green), 'Create' (green), and 'Request Delete' (red). Below these buttons is a navigation menu with tabs for 'Permit', 'Commitments', 'Locations', 'Dates', 'Documents', and 'History'. The 'Permit' tab is selected. The main content area contains a form with the following fields: 'Permit #' (text input with value '9'), 'Regulator*' (dropdown menu with 'Alberta Agriculture and R...'), 'Type*' (dropdown menu with 'Nesting Bird Survey (Migratory Birds Convention Act)'), 'Approval #' (text input), 'Town' (location icon), 'CMA' (dropdown menu with 'Select CMA'), 'District' (dropdown menu with 'Select District'), 'Region*' (dropdown menu with 'NORTH CENTRAL REC'), and a checkbox for 'Non Compliance'. The 'Consultants' section is partially visible at the bottom.

Hint: If permits, commitments or contaminated site records have been entered in error, use the **Request Delete** button to notify the REC/EMS contact that the item needs to be deleted. A reason for deletion must be provided.

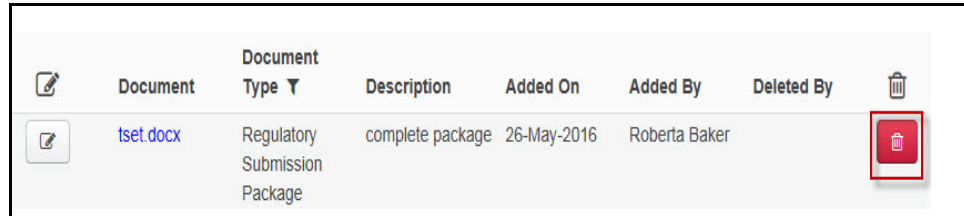
Hint: The REC/EMS will not receive an email. Once they log on, they will see a link next to the people icon that will open a viewing window that will allow for the processing of the deletion requests.

Alert! Permits that have commitments attached cannot be deleted.

Deleting Documents

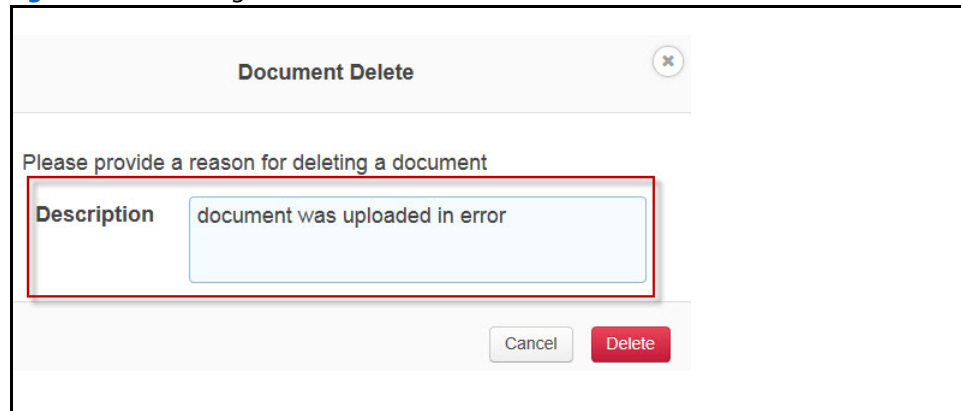
Documents associated to Permits, Commitments and Projects, may be deleted by the REC/EMS contact and the user that uploaded the document. When deleting a document a reason must be provided. Documents are not actually deleted, they are hidden and can be viewed by 'unhiding' them.

Figure 2.25 Deleting Documents



	Document	Document Type	Description	Added On	Added By	Deleted By	
	tset.docx	Regulatory Submission Package	complete package	26-May-2016	Roberta Baker		

Figure 2.26 Deleting Documents Reason Comments



Document Delete [X]

Please provide a reason for deleting a document

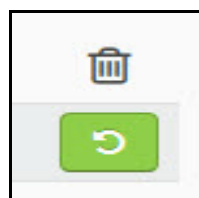
Description	document was uploaded in error
-------------	--------------------------------

Cancel Delete

Undo Deleted Documents

If a document is accidentally deleted and you realize before you click on save or update, then you can use the **Undo** button. If Save and/or Update has been selected, the action cannot be undone.

Figure 2.27 Deleting Undo button



Show Deleted Documents

Once a document is deleted, you can only display the document details, and click on the link to the deleted document and view the contents. .

Figure 2.28 Show deleted documents

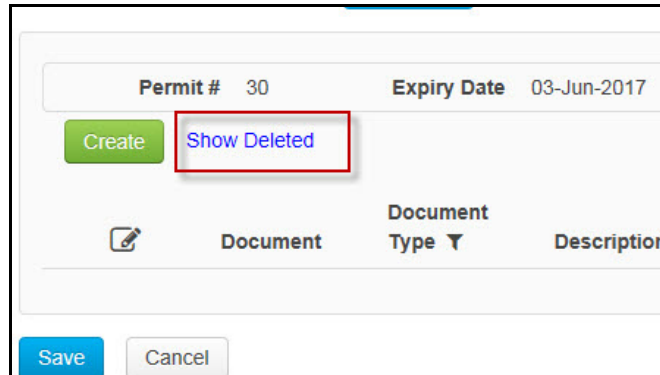
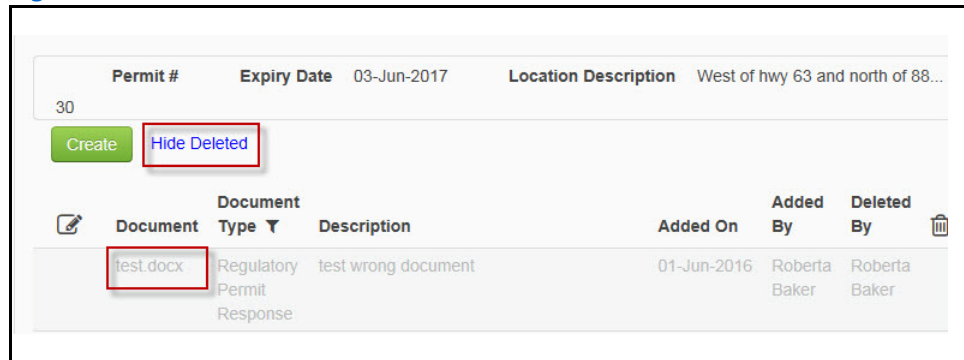


Figure 2.29 View Deleted Document



Hint: To view the deleted document, click on the name of the document under the Document column.

Alert! You cannot restore a deleted document.

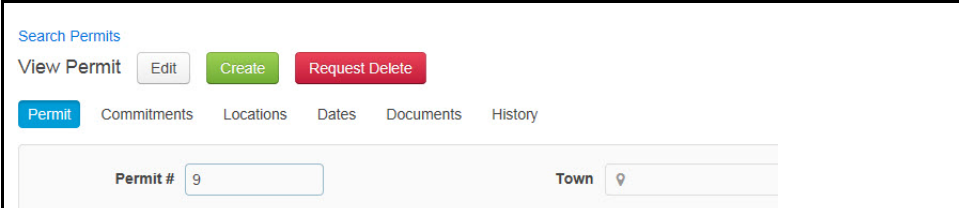
Deleting Milestones

Only the REC or the EMS contact can delete a commitment milestone with an actual due date. If no due date exists then the REC, EMS or the consultant that created the milestone may delete a commitment milestone.

Request Delete

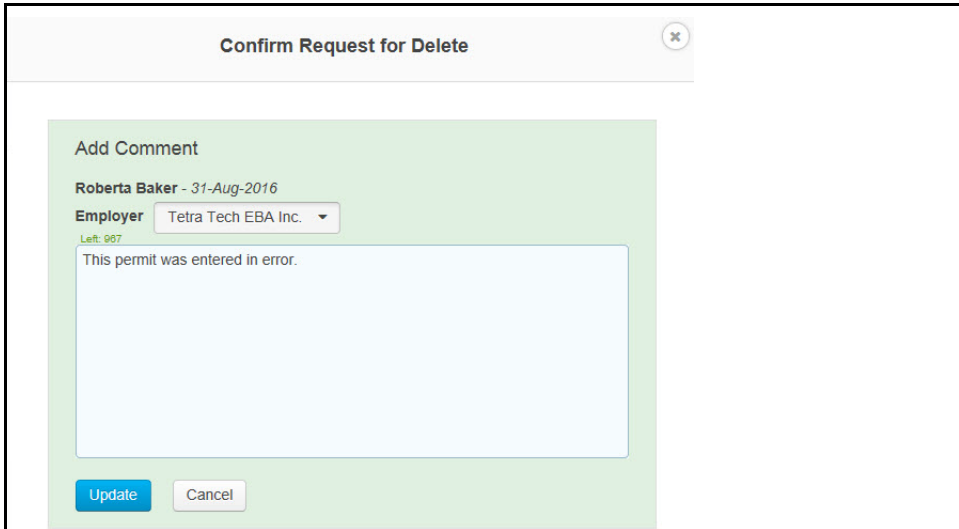
Occasionally permits, commitments and contaminated sites maybe entered in error. These records can only be deleted by a REC/EMS user with the appropriate security role. The user can mark a record for deletion by using the **Request Delete** button. A comment is required when requesting the deletion of a record. Once a record is marked for deletion, the **Clear Request** button appears.

Figure 2.30 Request Delete



The screenshot shows a web interface for managing permits. At the top, there is a 'Search Permits' section with a 'View Permit' button and three action buttons: 'Edit' (grey), 'Create' (green), and 'Request Delete' (red). Below this is a navigation bar with tabs: 'Permit' (active), 'Commitments', 'Locations', 'Dates', 'Documents', and 'History'. A search form contains a 'Permit #' field with the value '9' and a 'Town' dropdown menu.

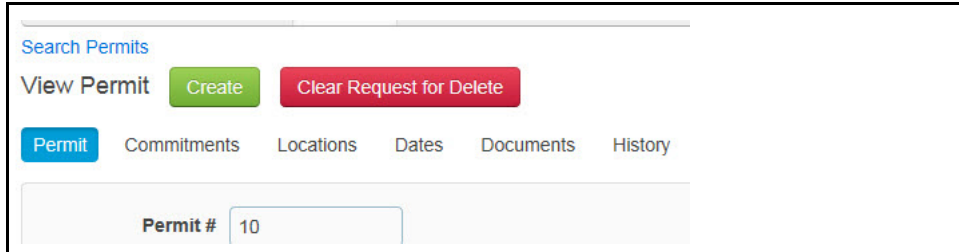
Figure 2.31 Request Delete Add Comment



The screenshot shows a 'Confirm Request for Delete' dialog box. It features a close button (X) in the top right corner. The main content area is titled 'Add Comment' and includes the following information: 'Roberta Baker - 31-Aug-2016', 'Employer' dropdown set to 'Tetra Tech EBA Inc.', and a text area containing the comment 'This permit was entered in error.' At the bottom of the dialog are 'Update' and 'Cancel' buttons.

Hint: If this was done in error, search for the item and clear the request using the **Clear Request for Delete** button.

Figure 2.32 Clear Request for Delete



The screenshot shows the same web interface as Figure 2.30, but with the 'Request Delete' button replaced by a 'Clear Request for Delete' button (red). The 'Permit #' field now contains the value '10'.

Alert! Once a record has been marked for deletion, it is set to read only and can only be deleted or recovered by the defined REC/EMS for that regional area.

Alert! A permit or commitment can only be recovered if the Environmental Project is not marked for deletion.

Delete Environmental Projects

ERTA environmental projects provides easy access to view all related items included in the project's environmental scope such as permits, commitments and contaminated sites (release/spills).

Only users that have access to edit the project can request the project be deleted.

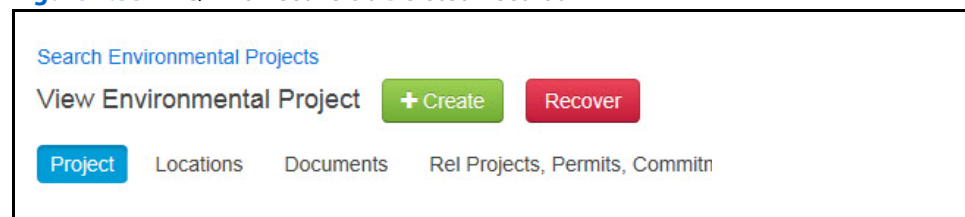
The process to delete the Environmental Projects can only be completed:

- ◆ By REC/EMS assigned to the project
- ◆ If there are no documents, permits, commitments or contaminated sites directly related to the project.
 - Exception: Contaminated sites that are only related as a result of the project within proximity to the site.

Recover Deleted Projects

Once a project or record has been requested for deletion, only the REC/EMS with the appropriate security access can recover a deleted record. A search for 'limit to deleted' is performed by the REC/EMS. From the Edit screen of the deleted project, click on the **Recover** button.

Figure 2.33 REC/EMS Recovers a Deleted Records



Edit and Create Functionality

After completing a search, the results are displayed below the search criteria. An Item number link will take you to additional screens where you can update the selected items. Once you are on the details screen, click on the **Edit** button to enable editing of the content.

Figure 2.34 Commitments Search Screen - Showing One Result

The screenshot shows a search interface for commitments. At the top, there is a 'Search Commitments' header with a '+ Create' button. Below this are various search filters: 'Commitment Id', 'AEP Incident #', 'Consultant' (with an 'Enter Party Name' field), 'Due Date' (with a dropdown set to 'Commitment' and date pickers for 'from (2015-12-31)' and 'to (2015-12-31)'), 'Location' (with a dropdown set to 'Any Location' and a 'Limit to Deleted' checkbox), 'Status' (set to '3 items selected'), 'Release/Spill' (radio buttons for 'Any', 'Yes', 'No'), 'Agreement #' (with an 'Enter Contract B' field), 'REC/EMS Contact', 'AT Administrator', 'Env Project', and 'Permit #'. A 'Search' button and a 'Clear' button are at the bottom left of the filter section.

Below the filters, it says 'Matching Commitments 12' with a download icon. A table displays the results:

Commit. # / AEP #	Commitment Description	Status	REC/EMS Contact	Consultants	Due Date
2	Post-Construction monitoring reporting to DFO for fish habit...	In Progress	David H. Jones	Engineering Associates	31-Oct-2016

Figure 2.35 Commitments Link - Edit or Create

The screenshot shows the 'View Commitment' screen for commitment #2. At the top, there are buttons for 'Edit', '+ Create', and 'Request Delete'. Below these are tabs for 'Commitment', 'Locations', 'Dates', 'Documents', and 'History'. The main form contains several fields: 'Commitment #' (2), 'Town' (with a dropdown), 'AT Administrator' (Wing Choy), 'Permit #' (7), 'CMA' (Select CMA), 'REC/EMS Contact*' (Stephen Legaree), 'Env Project', 'District' (FORT MCMURRAY), 'Post Const Commitment' (checkbox), 'AT View Only' (checkbox), 'Region*' (FORT MCMURRAY R...), 'Deferred to Future Project' (checkbox), 'Release/Spill No', 'Override Proj' (checkbox), and 'Distance (m)'. At the bottom, there is a table for 'Consultants':

Active	Consultant	Agreement	Added By
<input checked="" type="checkbox"/>	Tetra Tech EBA Inc.	CE09009	12-May-2016 Eddie Noton

Hint: Each edit screens allows you to add locations, dates, documents, conditions, amendments, wells and status as they pertain each ERTA content.

Display Status History

As Permits, Commitments and Contaminated sites, are updated and their status is changed, a history is created. There are two ways to view the status history. First is by a single click on the number associated to the Status field name or by clicking on the History Tab. Use the **X** button to close the history window. To close the History Tab, click on the **Cancel** button, or click on another Tab.

Figure 2.36 Status Field History - Number

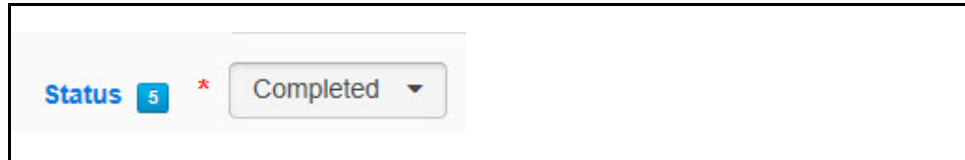


Figure 2.37 Status History Window - Number

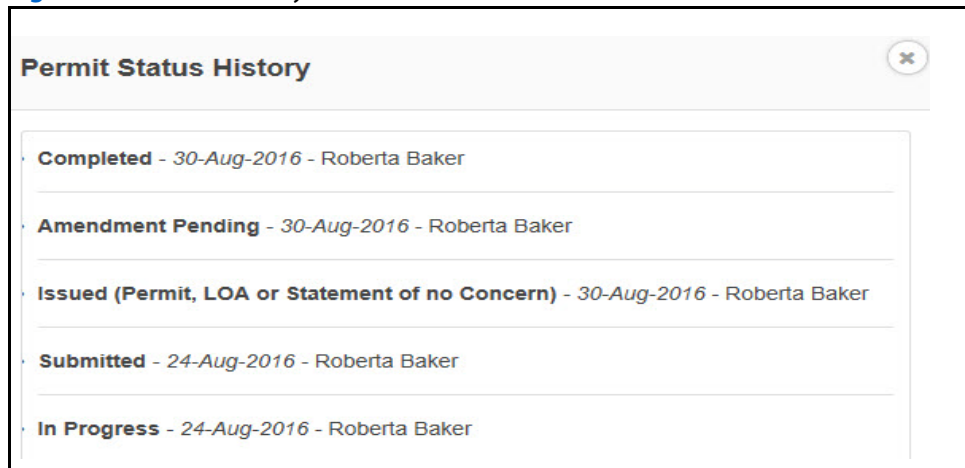


Figure 2.38 Status History - Permits

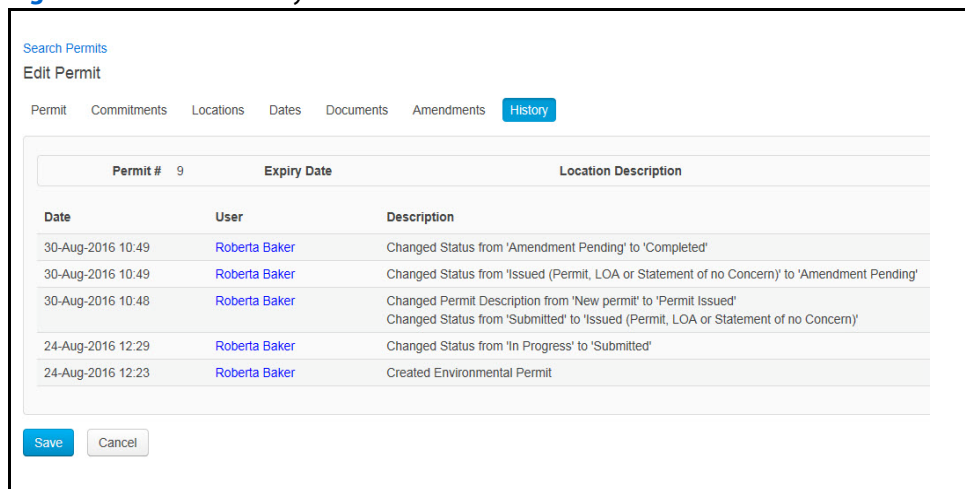
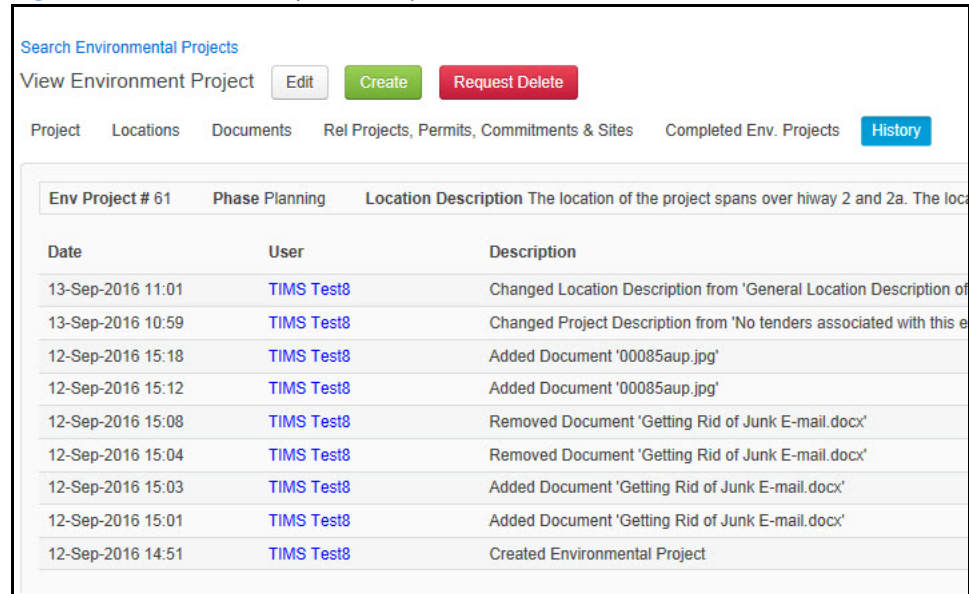


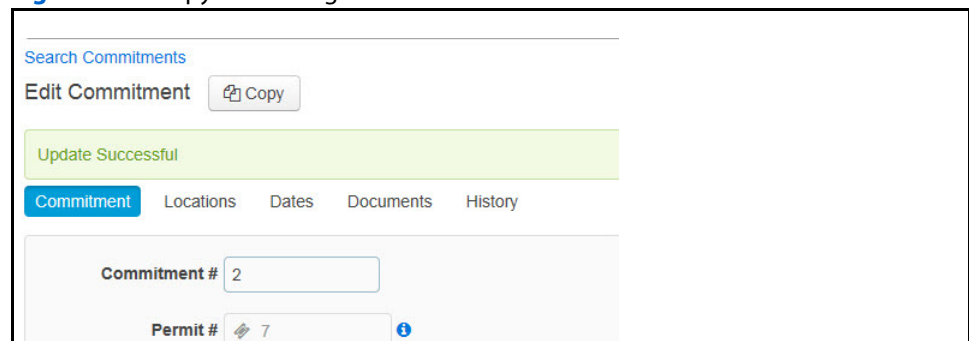
Figure 2.39 Status History Tab - Project Information and Documents



Copy Commitment

Once you have saved a Commitment the option of making a copy is displayed. This will copy all the project/permit location and contact information. To make a copy, click on the **Copy** button, make the required changes to the new commitment and click on the **Save** button.

Figure 2.40 Copy an Existing Commitment



Location Tab

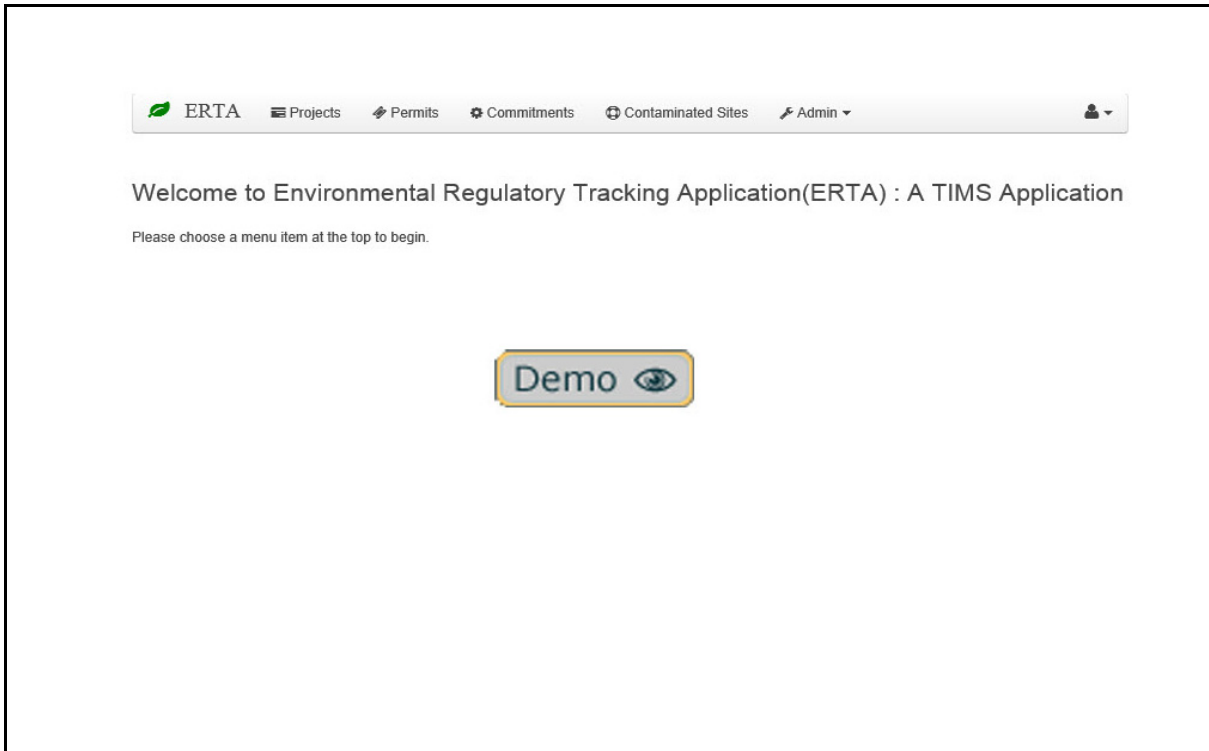
When entering data into ERTA you must provide at least one location. In the future this location(s) will be used for a mapping tool. Following are resources for location finding:

- ◆ maps.google.com
- ◆ baseloc.com (connects to lsdfinder.com)
- ◆ Land Tracker App for iOS
- ◆ SPIN2 - <https://alta.registries.gov.ab.ca/spinii/logon.apx>

Demo Edit and View Status History

This demo will have you locate all permits for a specific project and edit the status of a single permit, view the History of the permit and add a commitment to the existing permit.

Demo 2.2 Edit a record in ERTA



How To

1. Perform your search and select the item you want to Edit.
2. From the View screen select the **Edit** Button.
3. Select the Project document, commitment, permit that you want to edit.
4. Click on the **Edit** button, Select Status and change status.
5. Click the **Save** button.
6. Click on the *History* tab to view all changes or click on the number next to the Status field.

System Messages

When using ERTA you will see the following System Messages.

Figure 2.41 Saving and Mandatory Fields

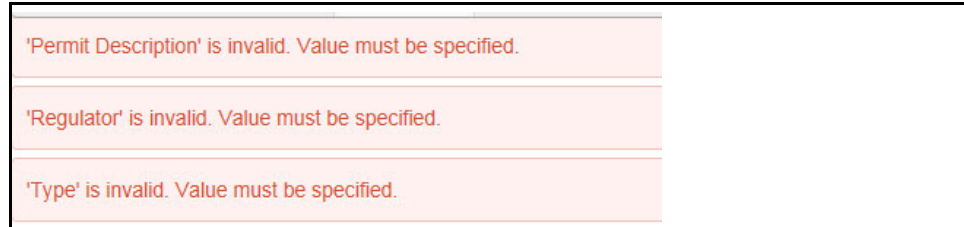
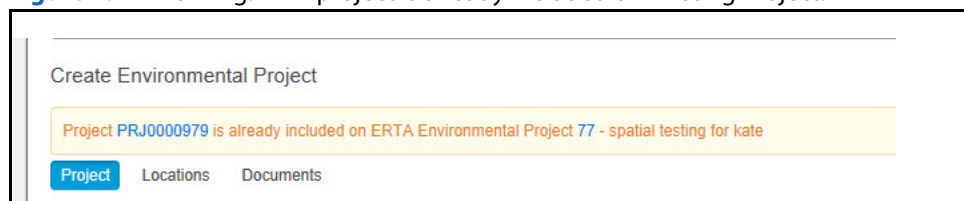
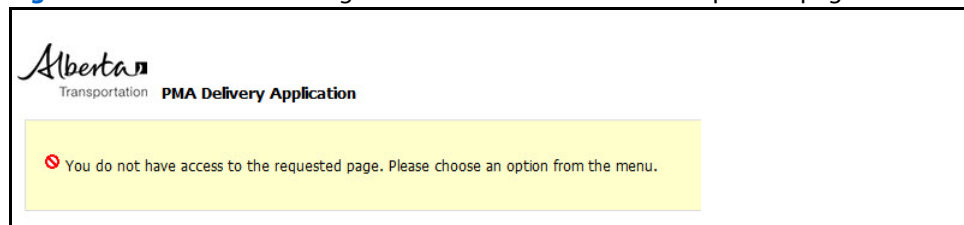


Figure 2.42 Warning: PMA project is already included on Existing Project.



Alert! Environmental Projects in the Design Phase, must have Permits and commitments related to just one tender. If this message appears contact your REC.

Figure 2.43 PMA Error Message: "You do not have access to requested page."



Alert! Consultants do not have access to PMA Project information and contract information. This message appears when the 'i' icon is used on PMA Project numbers and security access is not setup.

Figure 2.44 Permits with Pending Amendments

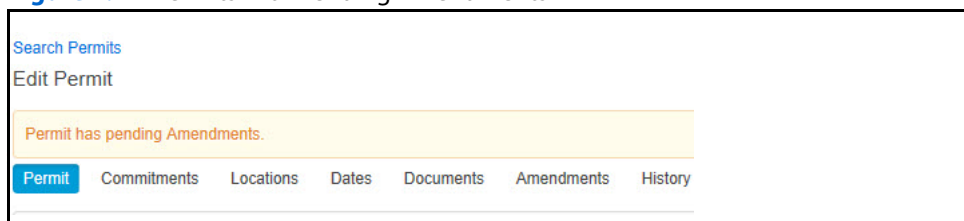
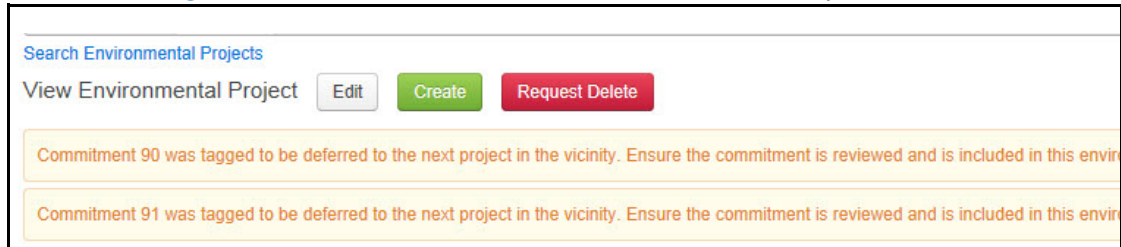


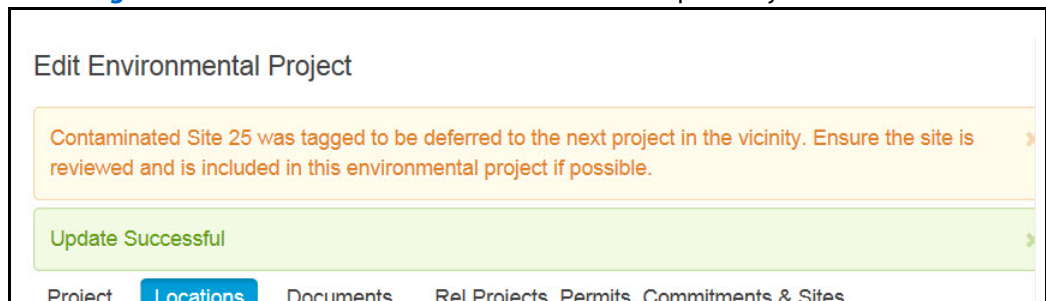
Figure 2.45 Deferred Commitment - Deferred to Future Project



Hint: Click on the 'Rel Projects, Permits, Commitments & Sites' tab and review the Matching Contaminated Sites listed below.

Alert! Only Commitments and Contaminated sites can be deferred to future projects. The future project must be within the default buffer distance which is set by an ERTA Administrator.

Figure 2.46 Contaminated Site - Deferred to Next Capital Project



Hint: On a contaminated site, the consultant can select the option of 'Remediation Deferred to next Capital Project' and leave the default buffer distance apply or choose to override the default buffer distance. Overriding will ensure the contaminated site is tagged when a new project is within the override buffer distance.

Figure 2.47 Override Buffer Distance on Deferred Contaminated Site

The screenshot shows the 'Edit Contaminated Site' interface. At the top, there is a search bar and a title 'Edit Contaminated Site'. Below this, a red error message states: "'Override Proj Distance (m)' is invalid. Must be a whole number between 0 and 9999'. The main form has several fields: 'Site Name' (Etzikom HMY), 'Site Status' (Phase 1 ESA), 'Owner' (Enter Party Name), 'REC/EMS Contact' (Leslie Wensmann), and 'Insurance' (Enter Party Name). A red box highlights the 'Override Proj Distance (m)' field, which contains the value '100000'. Above this field, there is a checkbox labeled 'Remediation Deferred to next Capital Project' which is checked.

Alert! The buffer distance can be over ridden at the time a commitment or contaminated site is being deferred. Maximum allowable distance is between 0-9999 (m)

Figure 2.48 Verify Default Buffer Distance

The screenshot is split into two panels. The left panel, titled 'Post Const', shows the 'Override Proj Distance (m)' field for a 'Deferred Commitment' with a tooltip that reads: 'Override distance (in metres) the future project must be within to identify the deferred commitment (default is 500m)'. The right panel shows the same field for a 'Deferred Contaminated Site' with a tooltip that reads: 'Override distance (in metres) the future project must be within to identify the deferred site remediation (default is 3,000m)'. The 'Distance (m)' field in the right panel contains the value '100000'.

Alert! The default buffer distance can be confirmed by the field help. ERTA Administrators can change this default.

Alert! Consultants can override this default value as required.

Notification Emails

Notification emails are sent to the Notify by Email party when the following conditions occur for either a permit or a commitment.

Table 2.8 Notification Emails

Item	Description
Completed	Completion date is entered and email notice is sent to the REC immediately.
Late	Seven (7) days prior to current date an email notification is sent.
Upcoming	Once every 30 days (monthly) an email is sent to the REC/EMS and Project Administrator listing the upcoming due dates. Calculated 60 days in advance of the due date.

Alert! The default 30 days Permit Expiry notification can be changed by the ERTA administrator.

Figure 2.49 Commitment Email Notification

View Commitment

Commitment Locations **Dates** Documents

Commitment Id	2	Due Date	31-Oct-2016	Location Description	BF 75731, Hwy 63:04		
Type	Start Date	Due Date	Completion Date	Compliance	Notify by Email	Notify Who	Comment
Commitment Due	01-Oct-2016	31-Oct-2016	31-Oct-2016	N	Y	Eddie Noton	Year 2 of this commitment. Due every year on October 31, fo...

Hint: The 'Notify by Email' option needs to be enabled for notifications to be sent for Completed, Upcoming or a Late Due Date.

Alert! To ensure that only one email is sent, the monthly email notification content will be grouped by individual person and will list all permits and commitments with various milestone dates in one email.

Figure 2.50 Commitment Upcoming and Late Notification

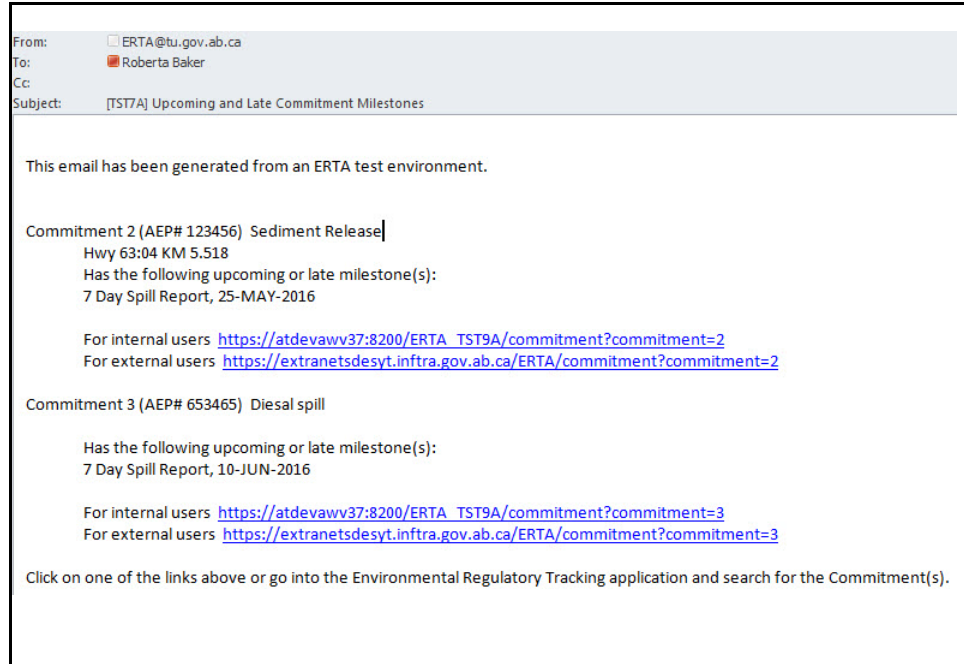


Figure 2.51 Permit Upcoming and Late Notification

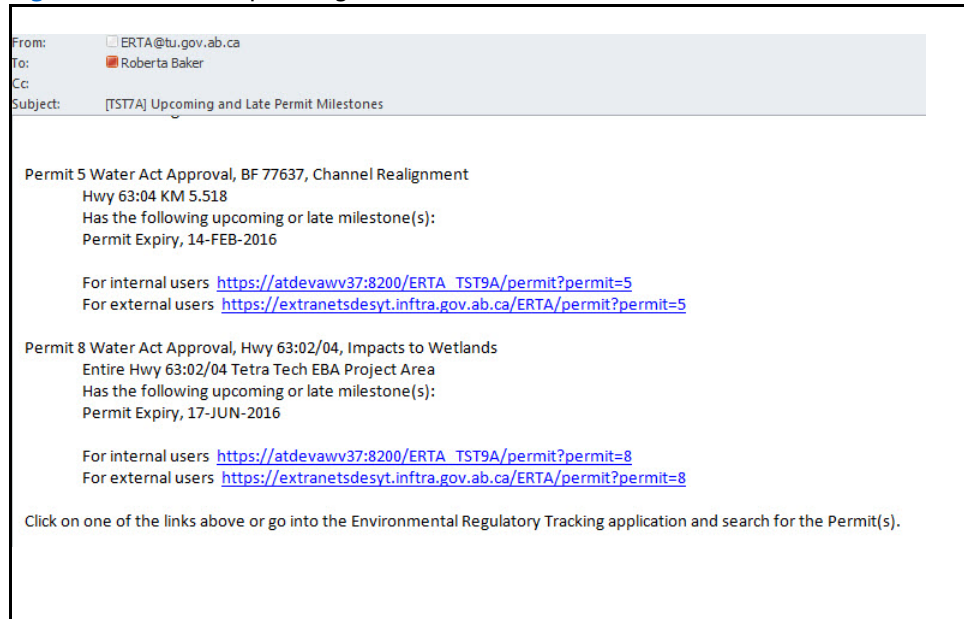


Figure 2.52 Commitment Completed Requiring Follow Up



Chapter 3: Projects

This chapter covers how to enter information into ERTA following a recommended workflow.

Topics in Chapter:

1. What is an Environmental Project?
2. How Data is Organized by Project Number?
3. Create Environmental Projects
4. Adding Project Documents
5. Create Permits and Commitments

What is an Environmental Project?

The Environmental projects are created by the consultant and can also be associated to the appropriate tender that is currently defined in the consulting agreement.

For maintenance contracts they typically will not have associated tenders, but environmental projects will be created to link to the project documents, and any permits and commitments required.

The focal point for Environmental Projects is for:

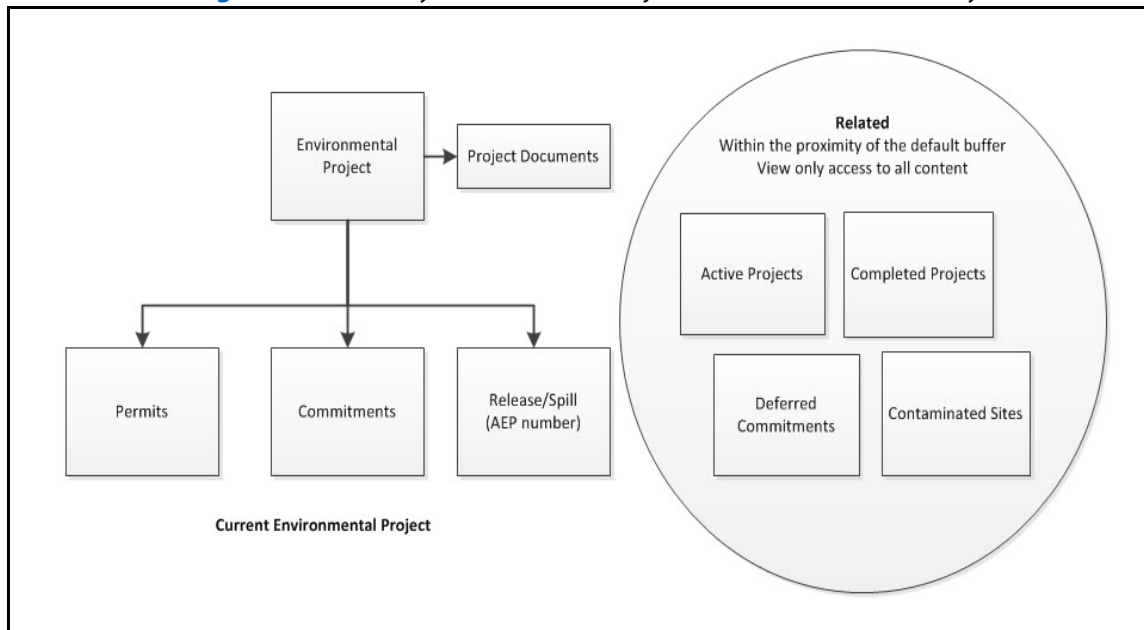
- ◆ Generating and viewing all permits, commitments, and contaminated sites created as a result of the project.
- ◆ Capturing project level documents such as: Environmental Assessments, project level correspondence, Environmental Risk Assessments, etc)
- ◆ Identification of Contaminated sites that may affect the project due to their proximity to the current project.
- ◆ Identifying other environmental projects that are within the system pre-defined buffer distance of the project. This includes:
 - Completed environmental projects that may provide valuable information on environmental issues and remediations on past projects.
 - Environmental projects that performed an Environmental Assessment for an area that is planned to include multiple construction tenders.

See: Refer to the **Environmental Management System (EMS) and Regulatory Framework website** for the EMS Manual and checklists. <http://www.transportation.alberta.ca/5820.htm>.

Searching Environmental Projects

When viewing an Environmental project, the default pre-defined buffer distance will display completed environmental projects, current environmental projects, deferred commitments and contaminated sites that may affect the project. The consultant and sub-consultants can only view permits, and commitments associated to the related projects and contaminated sites content.

Figure 3.1 Search by Environmental Project Number - Buffer Proximity



Alert! Permits must be linked to an Environmental Project or contaminated site (future enhancement).

Hint: The system default buffer distance can be over ridden by an ERTA Administrator or the consultant for deferred commitments and contaminated sites.

Create Environmental Projects

The advantages of creating the Environmental Project first will use ERTA's inheritance functionality designed to obtain data from PMA Delivery to auto populate fields on the Create Environmental Project screen, which in turn will filter down to Permits and Commitments screens when they are created from the project screen.

The approach for creating environmental projects for complex projects covering a large geographical area may be different than the approach for smaller, more focused projects.

For the smaller, more focused projects where the breakdown of the construction tenders to be created and ultimately awarded is known, a single environmental project would be created for each tender. This allows for the permits and commitments required for each tender to be kept separate so that it is a straightforward process to confirm that all of the permits that are required for a specific tender have been issued prior to tender advertising.

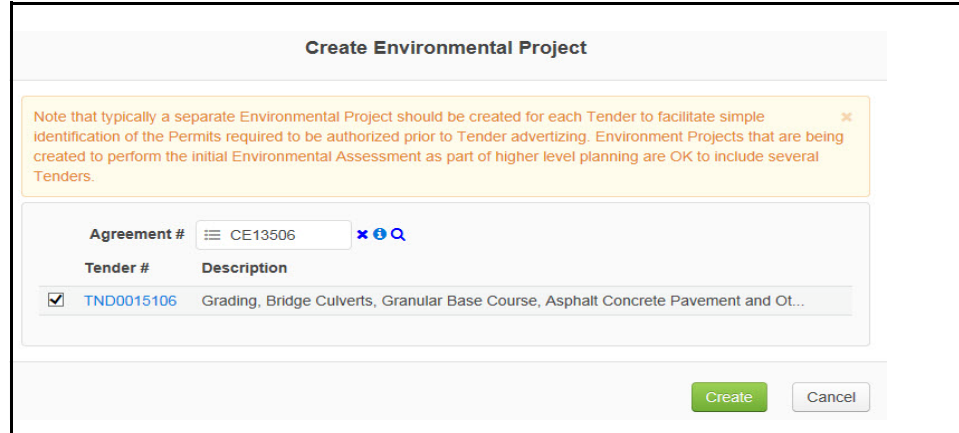
For complex projects where the breakdown of the tenders is not known or the geographic area being assessed is large, then multiple environmental projects may be required as the project progresses from the high level planning and environmental assessment phase to the more detailed design and tender package preparation.

The first environmental project created in the planning phase, would capture the documents for the environmental assessments completed for the entire geographic area. As detailed design is completed and the breakdown of the tenders is determined then environmental projects would be created for each tender to be released. These environmental projects would include the permits & commitments specific to the tender.

The design of ERTA ensures that when viewing the environmental project created for each tender the environmental project created during the planning phase will appear as a related project. This will allow for quick and easy access to view the environmental assessment and other documents completed during the planning phase as well.

To create an environmental project, click on the *Projects* module and click on the **Create** button.

Figure 3.2 Create an Environmental Project - with PMA Tenders



Create Environmental Project

Note that typically a separate Environmental Project should be created for each Tender to facilitate simple identification of the Permits required to be authorized prior to Tender advertizing. Environment Projects that are being created to perform the initial Environmental Assessment as part of higher level planning are OK to include several Tenders.

Agreement # CE13506

Tender # Description

Tender #	Description
<input checked="" type="checkbox"/> TND0015106	Grading, Bridge Culverts, Granular Base Course, Asphalt Concrete Pavement and Ot...

Create Cancel

Alert! Highway Maintenance Yard consultants use maintenance contracts and will have no tenders associated to those types of contracts.

PMA Tenders Available

For contracts that have tenders, data is obtained from PMA Delivery for the fields of: CMA, District, Region, REC/EMS Contact, AT Administrator and Project Sponsor and the addition of the PMA Project number.

If you have the appropriate security you can view the Work Activities associated to the contract, if not you will receive an error message that you do not have sufficient security.

If you want to override PMA then deselect the check box next to the AT Administrator and the Project Sponsor and enter your own data.

Figure 3.3 Inherited PMA Delivery Data on Create screen

The screenshot shows the 'Create Environmental Project' interface. At the top, there are tabs for 'Project', 'Locations', and 'Documents'. The main form contains several fields: 'Env Project #' (empty), 'Phase' (set to 'Planning'), 'Town' (set to '9'), 'CMA' (set to 'CMA07'), 'District' (set to 'FORT MCMURRAY'), and 'Region' (set to 'FORT MCMURRAY R...'). There are also checkboxes for 'AT Administrator' (Miranda Rowda), 'RECI/EMS Contact' (Stephen Legaree), and 'Project Sponsor' (Rizwan Hussain). Below this is a 'Consultants' section with an 'Add Consultant' link and a table listing active consultants. The table has columns for 'Active', 'Consultant', and 'Agreement'. One entry is visible: Tetra Tech EBA Inc. with agreement CE13506. Below the table are fields for 'Project Description', 'Location Description' (pre-filled with 'Grading, Bridge Culverts, Granular Base Course, Asphalt Concrete Pavement and Other Work'), and 'User Comments'. At the bottom, there is a 'PMA D Projects' section with an 'Add' button and a table listing PMA projects. The table has columns for 'Description / Project ID', 'Work Type', 'Sched Year', 'Const. Contract', 'Comments', and a delete icon. One entry is visible: PRJ0000979.

Active	Consultant	Agreement
<input checked="" type="checkbox"/>	Tetra Tech EBA Inc.	CE13506

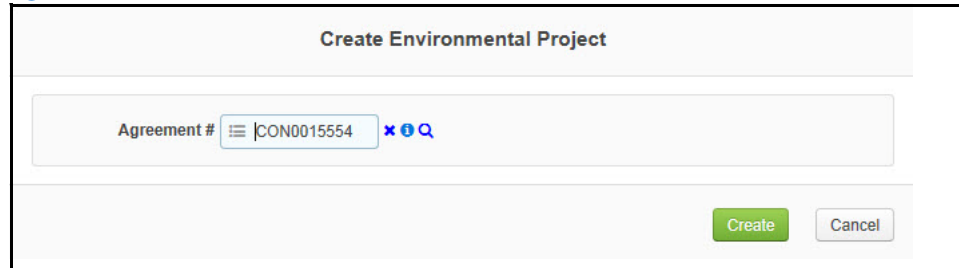
Description / Project ID	Work Type	Sched Year	Const. Contract	Comments
PRJ0000979				

Hint: When tenders are associated to the consultant agreement, the create screen will obtain data for various fields such as the Location description. This field will be defaulted to the tender description, if more than one tender, a semi-colon will separate multiple tender location descriptions.

No PMA Tenders Available

Highway Maintenance Yard Consultants and Highway Maintenance Contractors working under maintenance contracts will not have PMA tenders available to auto populate the environmental project screen.

Figure 3.4 NO Tenders - Create Screen



The screenshot shows a web interface for creating an environmental project. The main heading is "Create Environmental Project". Below this is a search field labeled "Agreement #" with the value "CON0015554" entered. To the right of the search field are icons for search and clear. At the bottom right of the form are two buttons: "Create" (green) and "Cancel" (grey).

Alert! If no tenders are found, the consultant will enter all of the information required for the environmental projects mandatory fields and fill in the business recommended fields.

Checklist

Before creating an environmental project, ensure you have the following information for the mandatory (*) and recommended fields.

Mandatory

- ◆ Phase
- ◆ Region
- ◆ REC/EMS Contact (auto populated when Region Selected)
- ◆ Agreement #(Consultant Contract #: CON12345 or CE09009) (automatically filled in)
- ◆ Project Description: Enter the scope of the environmental project.
- ◆ Location Tab: future mapping function on LLL, LRS, Structure, UTM and intersection.

Hint: Selecting a *District* will auto populate Region and REC/EMS Contact.

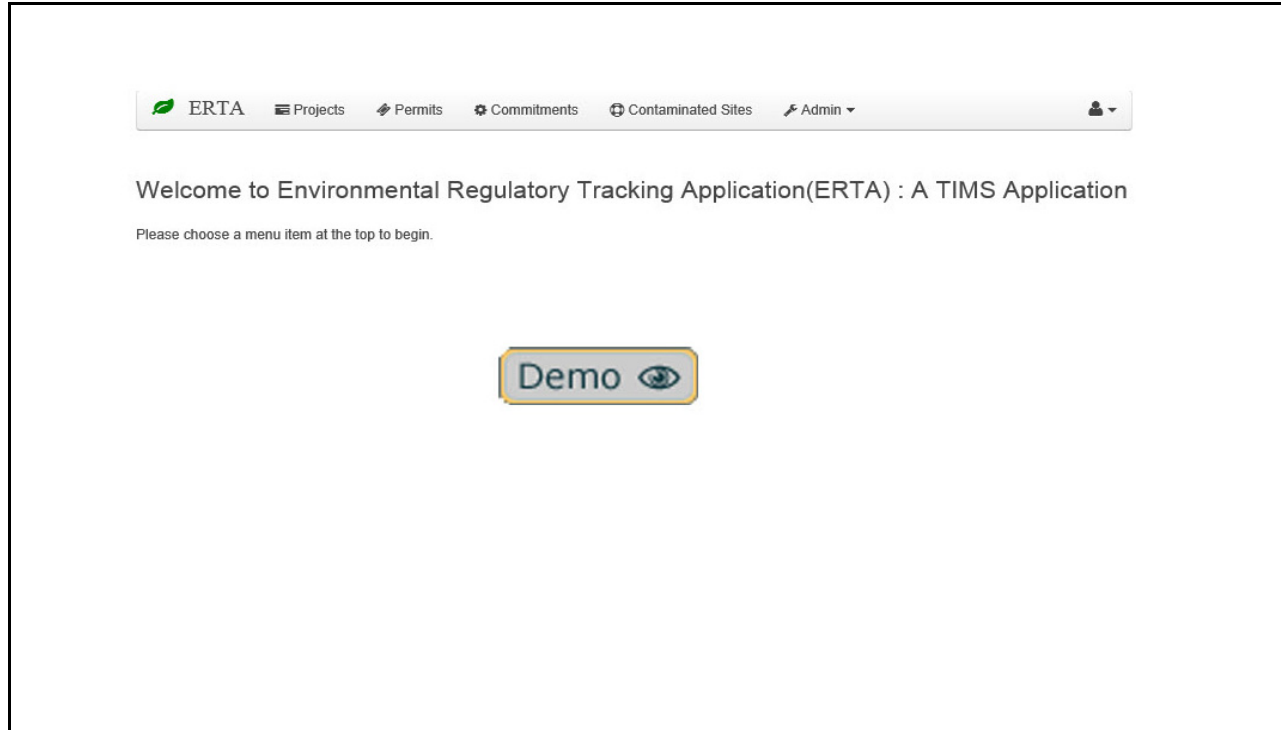
Recommended

- ◆ Location Description: Obtained from the Tender, if no tender attached, then input a general description of the location.

Demo Create an Environmental Project

This demo will show you how to create an environmental project.

Demo 3.1 Create a New Environmental Project



How To

1. Login to ERTA.
2. Click on the **Project** Tab.
3. Click on the **Create** button.
4. Fill in all the mandatory fields.
5. Click on the **Location** tab.
6. Click on the **Save** button.

Add Project Documents

There are various document/artifacts related to projects that are not associated to specific permits or commitments, but the overall project. Examples of these documents are: As Built Drawings, Environmental Assessments, Environmental Risk Assessments and various reports received from the Environmental Regulator Agencies.

To add a project document: Search for your Environmental Project, select your Project, click on the **Document** tab and then click on the **Edit** button. click the **Create** button to upload our project document.

Figure 3.5 Sort Order of Project Documents

Search Environmental Projects
Edit Environmental Project

Update Successful

Project Locations **Documents** Rel Projects, Permits, Commitments & Sites Completed Env. Projects History

Env Project # 61 Phase Planning Location Description The location of the project spans over hiway 2 and 2a. The loc...

Create Show Deleted Show Permit Documents Show Commitment Documents Show Related Project Documents

Document	Document Type	Description
2016-05-13_EA Hwy 3.pdf	Environmental Assessment	this is the EA document that s...
2016-02-08_ERA Hwy 3.pdf	Environmental Risk Assessment	follow EA
2016-05-16_Site Photos.pdf	Photo	Photo of site Hwy 3 west and e...
00085aup.jpg	As Built Drawings	Uploaded new version of As bui...

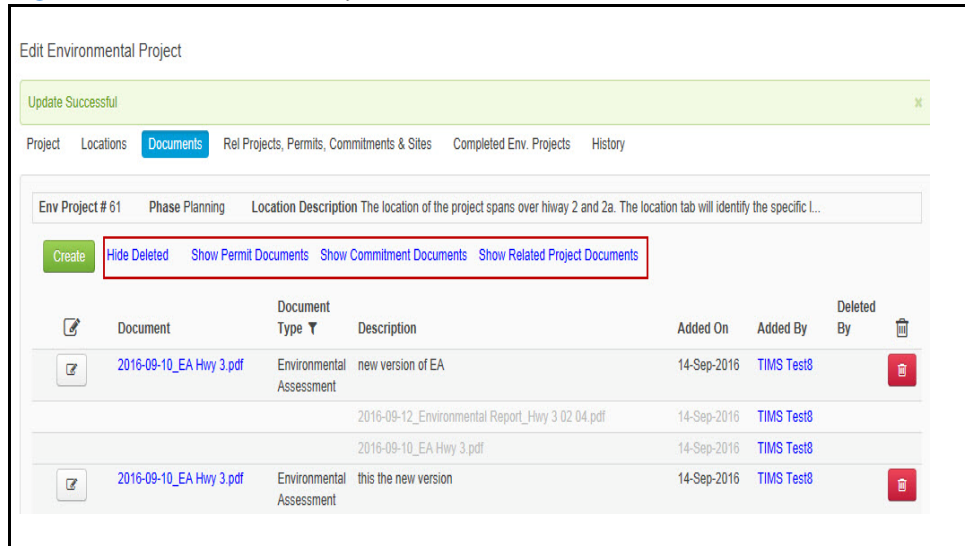
Save Cancel

Alert! Environmental Risk Assessment (ERA) document will always follow the Environmental Assessment (EA) document (sorted by document type). All other documents will be sorted on the upload date.

View Documents

All documents related to the project, permits and commitments can be viewed.

Figure 3.6 Environmental Project - Documents



Hint: To view Project Documents, from the project screen, click on the *Document* tab.

Hint: To view project documents and permit documents, click on the matching *Permit* and then click on the *Document* tab. You then can choose to see Project Documents and Permit documents.

Hint: To view documents related to Permits, Commitments or the Related Project Documents, click on the related link.

Hint: To create a new permit or commitment click on the *Rel Projects, Permits, Commitments & Sites* Tab, click on the **Edit** button then select the **Create** button.

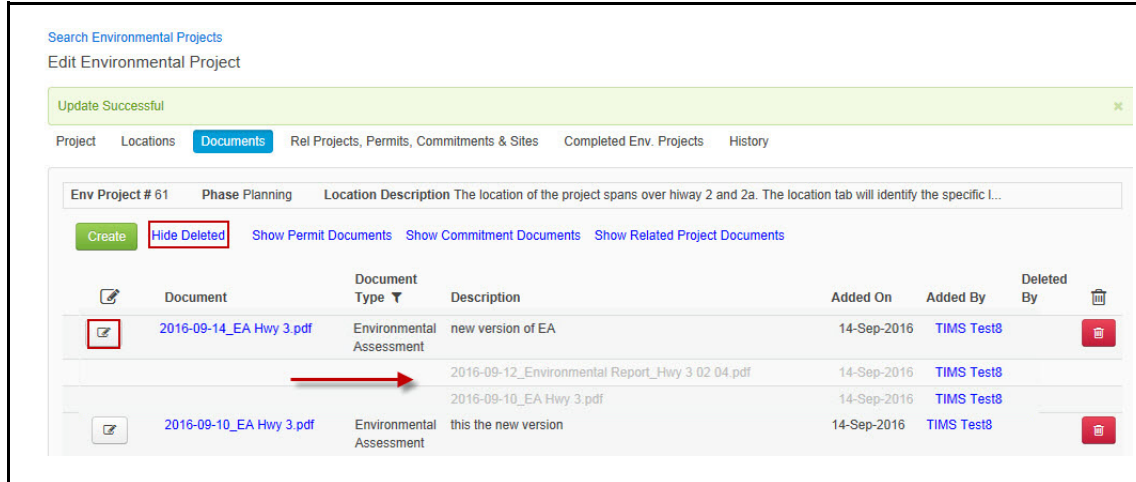
Alert! Deleted versions of the documents will appear at the bottom of the list and be 'grayed' out.

Upload a new Version

Occasionally you will need to upload a new version of a document previously uploaded.

Click on the **Edit** button next to the document and select the new file to be upload.

Figure 3.7 Upload a new Version of Project Document

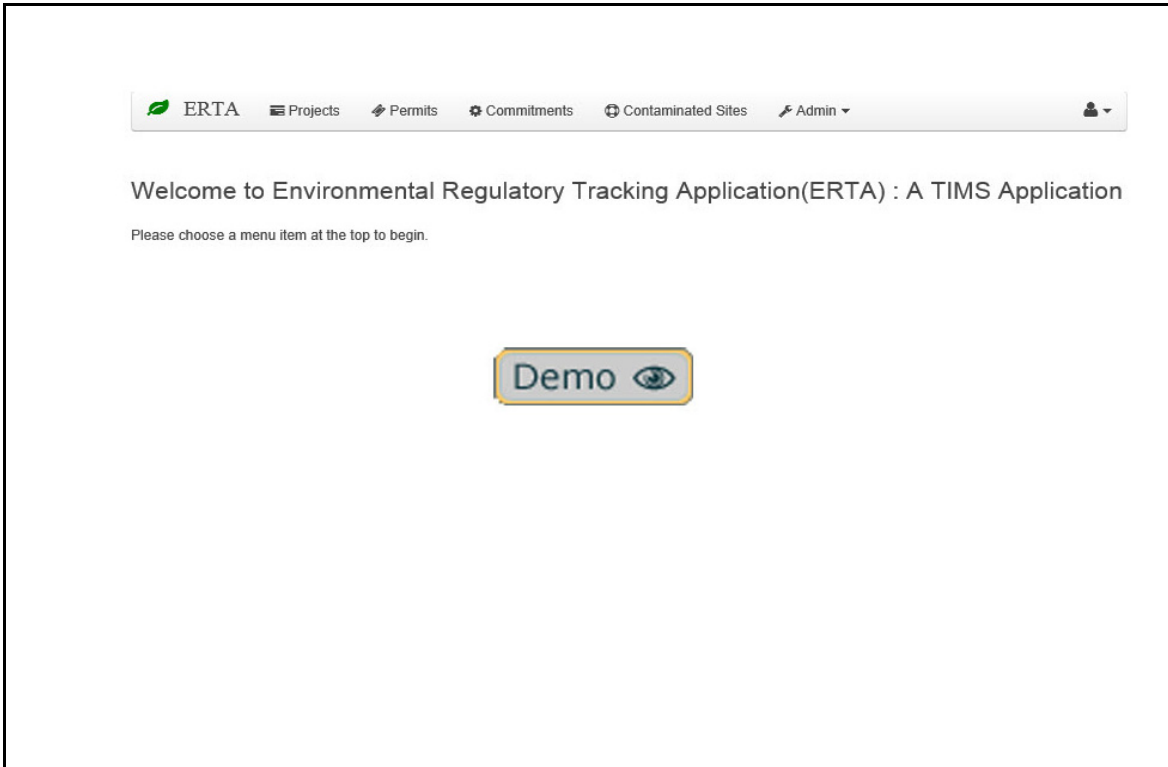


Hint: Once you have uploaded the new version of the document, it is hidden from the document view. You need to click on the edit icon (pencil) associated to the new document. The old versions will be displayed below the current document.

Demo Add New Document Version

This demonstration will show you how to upload a new version of a document and how to view old versions and deleted documents.

Demo 3.2 Add New Document Version



How To

1. Search for the document that needs to have a new version uploaded.
2. Click on the *Documents* tab.
3. Click on the **Edit** button next to your document.
4. Update the Description field.
5. Click on the Select File link, browse to select the file.
6. Click on the **Update** button.
7. Click on the **Save** button.

Delete Documents

When documents are no longer required you can delete them, but must provide a reason for deleting. Click on the **Delete** button associated with the document.

Figure 3.8 Delete Documents

The screenshot shows the 'Documents' tab for 'Env Project # 61'. It displays a table of documents with columns for Document, Document Type, Description, Added On, Added By, and Deleted By. The first document, '2016-09-10_EA Hwy 3.pdf', has a red 'Delete' button highlighted with a red box. Other documents listed include '2016-09-10_EA Hwy 3.pdf' and '2016-05-13_EA Hwy 3.pdf'. Navigation links like 'Show Deleted' and 'Show Permit Documents' are visible above the table.

Document	Document Type	Description	Added On	Added By	Deleted By
2016-09-10_EA Hwy 3.pdf	Environmental Assessment	new version of EA	14-Sep-2016	TIMS Test8	
2016-09-10_EA Hwy 3.pdf	Environmental Assessment	this is the new version	14-Sep-2016	TIMS Test8	
2016-05-13_EA Hwy 3.pdf	Environmental Assessment	this is the EA document that s...	14-Sep-2016	TIMS Test8	

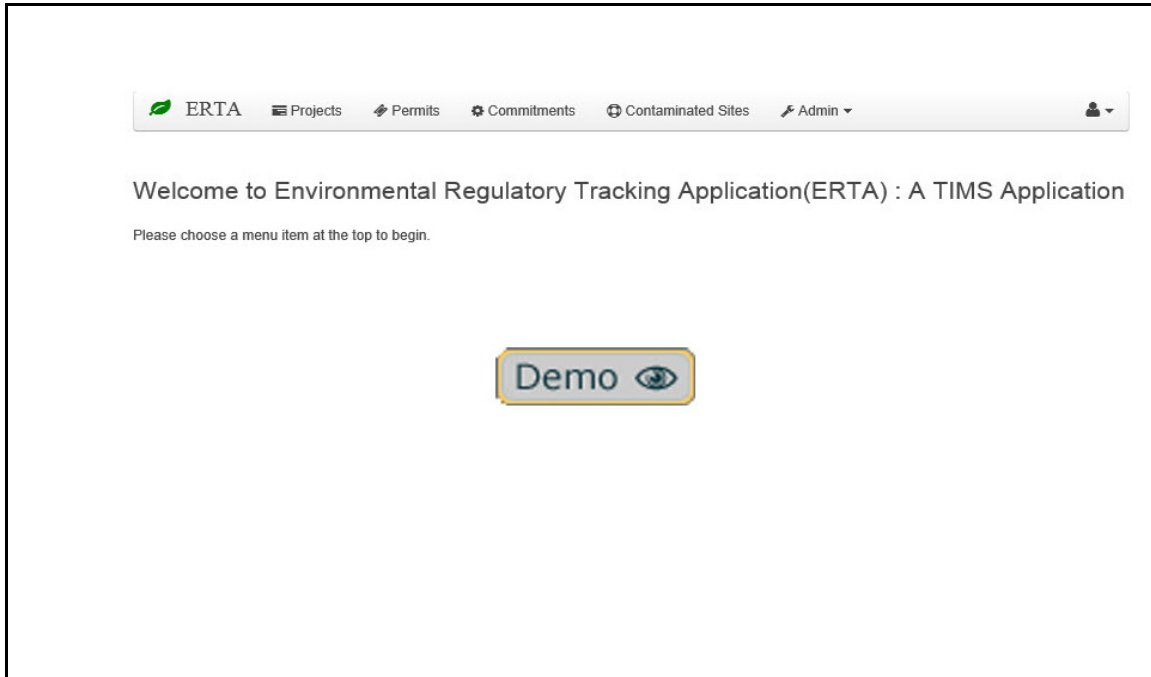
Alert!

To support proper auditing requirements, all versions of documents (including deleted) will be kept within the system. By default the document tab will only show the most current version of the document. Click the Show Deleted link to view deleted versions of the document. Toggle the Hide Deleted link to remove the deleted documents from the view.

Demo Add Project Documents

This demo will show you how to search for a project and add Project Document and add a new version of that document.

Demo 3.3 Add Project Documents



How To

1. Login to ERTA.
2. Click on the **Project** Tab.
3. Search for your project.
4. Select your project and click on the **Edit** button.
5. Click on the **Document** tab and click on the **Create** button.
6. Select the type of document, add the description, from the documents field, upload your document.
7. Click on **Update** button to save the uploaded document.
8. Click the **Save** button.
9. To add new version, click the **Edit** button, next to your document.
10. In the Document field, click on Select File link or drag & drop your file.
11. Click on **Update** button.
12. Click **Save** button to save your record.

Add Permit and Commitment

Creating permits and commitments by linking to an Environmental project will inherit various fields, creating consistency in data entry. To create permits or commitments attached to your project, search for your project, select your project, then click on *Rel Projects, Permits, Commitments & Sites* tab. To make changes to the project, click on the **Edit** button and click on the **Create** button next to either permits or commitments.

Figure 3.9 Create Permit, Inherit from Environmental Project

Alert! When creating a permit or commitment from the Environmental project screen: Town, CMA, district, Regional, AT Administrator, REC/EMS Contact and Project Sponsor are auto populated from the project.

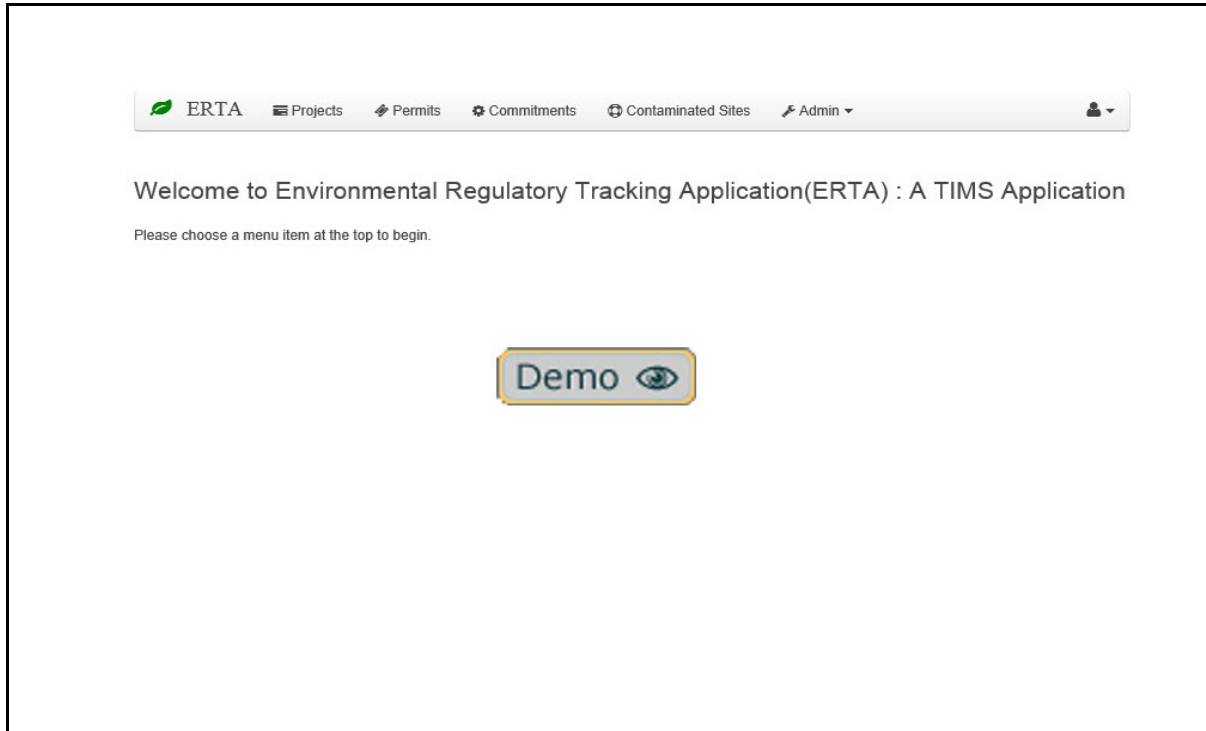
Alert! The inheritance values at the permit level come from the environmental project or the contaminated site (future). These can be changed by de-selecting the check mark and entering a new value.

See: Refer to the [Permit](#) and [Commitment](#) sections for more detail on the fields on each screen.

Demo Add Permits and Commitments

This demo will show you how to search for your project and create permits associated to the project.

Demo 3.4 Add Permits to an Environmental Project



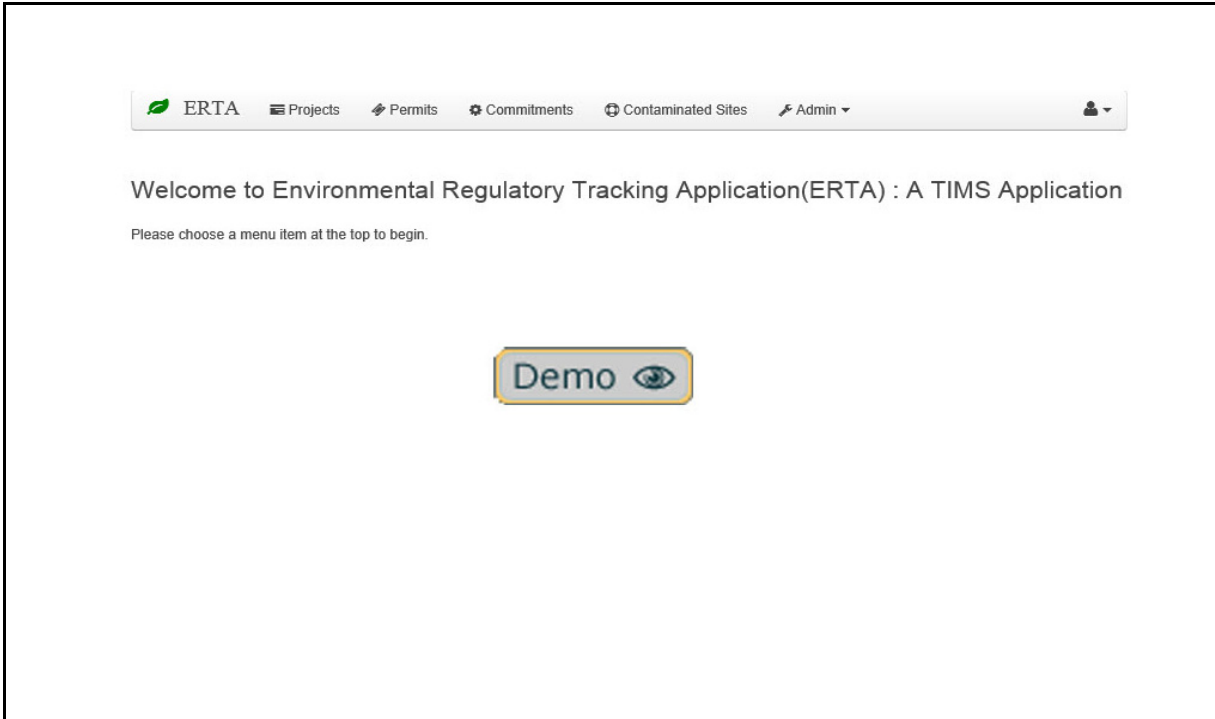
How To

1. Login to ERTA.
2. Click on the **Project** Tab.
3. Search for your project.
4. Select your project.
5. Listed below you will see all matching permits, commitments and contaminated sites.
6. To create a permit or commitment, click on **Edit** button.
7. Click on the *Rel Projects, Permits, Commitments & Sites* tab.
8. Click on the Create button associated with permit or commitment.
9. When finished entering your information, click on the **Save** button.

Demo Add Commitments to a Project

This demo will show you how to search for your project and create permits associated to the project.

Demo 3.5 Add Commitments to Environmental Project



How To

1. Login to ERTA.
2. Click on the **Project** Tab.
3. Search for your project.
4. Select your project.
5. Listed below you will see all matching permits, commitments and contaminated sites.
6. To create a permit or commitment, click on **Edit** button.
7. Click on the *Rel Projects, Permits, Commitments & Sites* tab.
8. Click on the Create button associated with permit or commitment.
9. When finished entering your information, click on the **Save** button.

Chapter 4: Permits

This chapter covers how to enter information into ERTA following a recommended workflow.

Topics in Chapter:

1. Overview of Permits
2. Permit Workflow
3. Life Cycle of a Permit
4. Create Permits
5. Uploading associated documents
6. Dates and Email Notifications
7. Edit Permits (Amendments)
8. System Notifications

Permits

Permits are identified during the planning, and design phases of a project. The Environmental consultants engaged during the planning and design phase are responsible for recording the Permits and all associated documents in the ERTA application.

During the construction phase the consultant and REC will monitor the permits and ensure that the data in ERTA reflects the correct status of permits.

What is a Permit?

A permit is federal/provincial; approval or authorization. Given the varied nature of the Environmental Legislation and standards that apply to construction of the roadway network there is a variety of Permits that are managed by this system.

Roadway construction projects adhere to the federal and provincial environmental regulations during project planning and design work, contract preparation and review, inspection of construction activity, and regulatory monitoring. These regulations are in the form of Permits. Permits may require long term monitoring by the Alberta Transportation department. It is essential that Transportation have all pertinent Permits and Commitments; and their associated document pro-actively managed to avoid non compliance.

Who Uses this info?

Alberta Transportation Project Administrators and Regional Environmental Coordinators are ultimately responsible for tracking multiple permits across multiple projects and the ERTA application will assist with the current and historical inquiries from legislator's. It is essential that the department have all pertinent Permits; and their associated documentation; pro-actively managed to avoid non compliance.

Permit Workflow

The environmental consultant will be responsible for entering the permit and commitments related to the environmental project. The project scope and deliverables will be identified in the Environmental Terms of Reference (TOR). The following workflows may not be used by P3 or Maintenance Contractors.

Figure 4.1 Typical Consultant Work flow for updating ERTA during Design

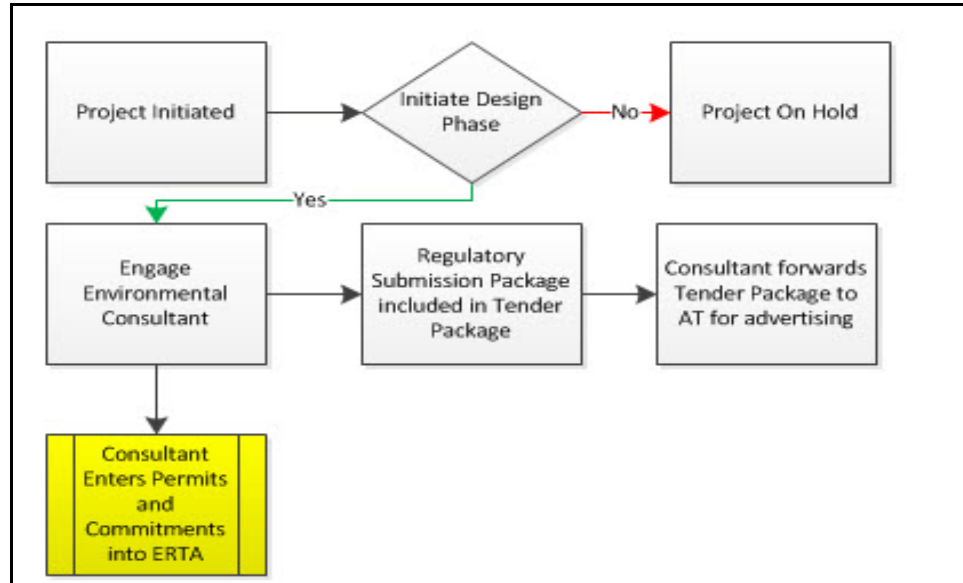


Figure 4.2 Typical Consultant Work flow for updating ERTA during Construction

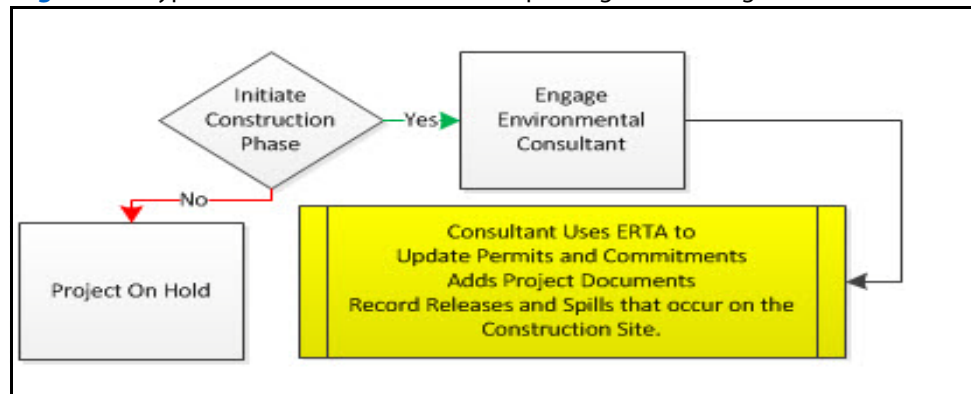
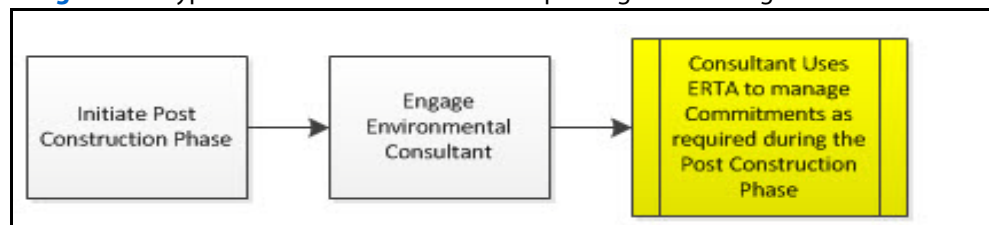


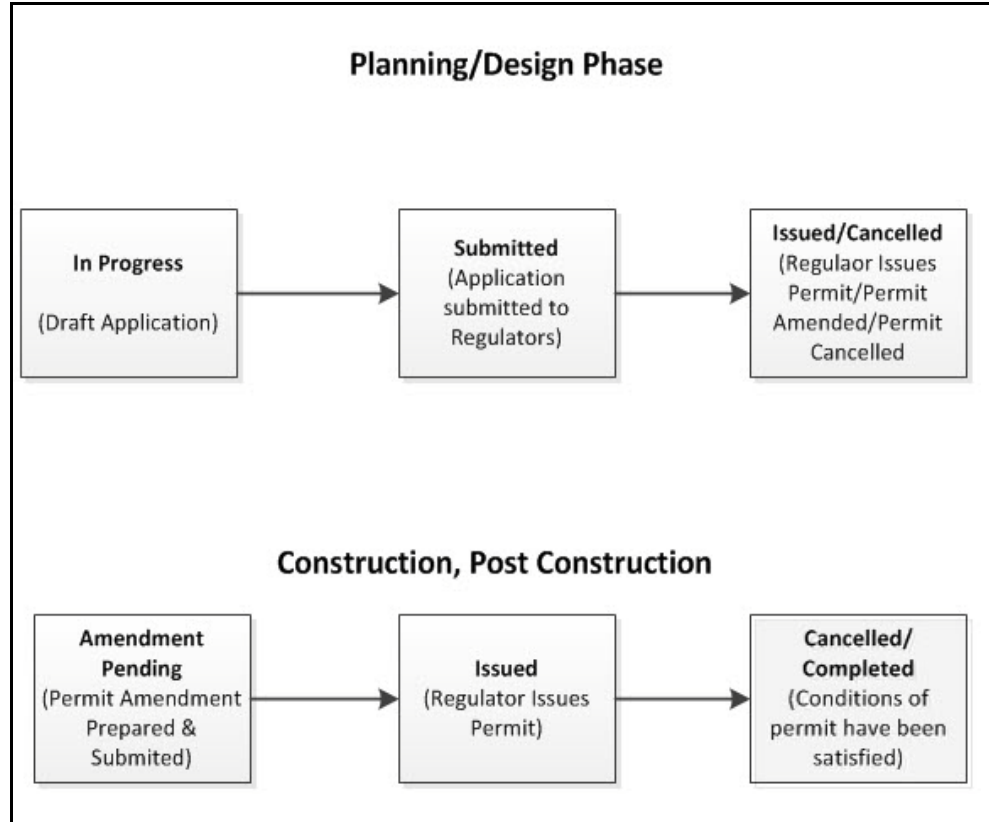
Figure 4.3 Typical Consultant Work flow for updating ERTA during Post Construction



Permit Life Cycle

There are a number of different status that a permit will move through during it's life cycle.

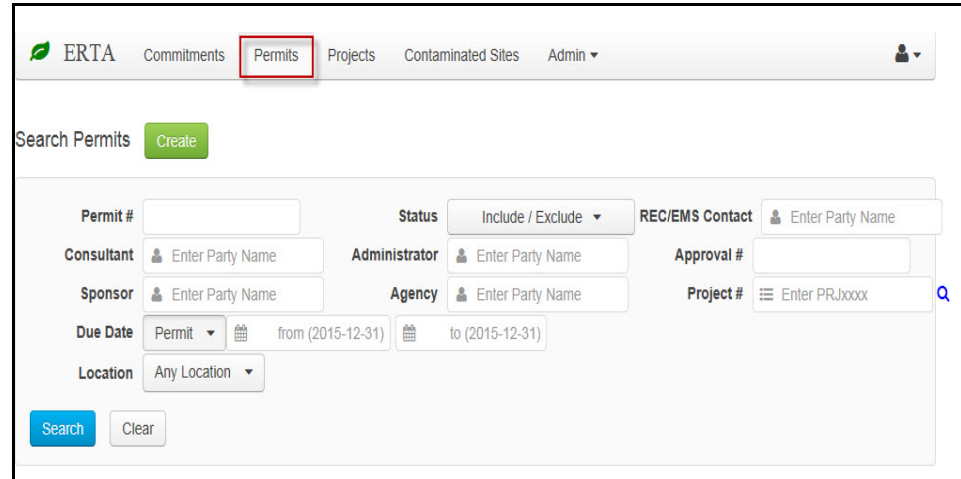
Figure 4.4 Typical Consultant Work flow for updating Permits



Permits

The Permit screen is where you create, edit and search for Permits. Permits must be linked to an environmental project. Once a permit has been issued an amendment would need to be created to make any changes to the permit. This section describes the life cycle of a permit and its relationship to projects and commitments.

Figure 4.5 Permit Screen



The screenshot shows the ERTA web interface. At the top, there are navigation tabs: ERTA, Commitments, Permits (highlighted with a red box), Projects, Contaminated Sites, and Admin. Below the tabs is a search bar labeled 'Search Permits' with a green 'Create' button. The main area contains a search filter form with the following fields: Permit # (text input), Status (dropdown menu with 'Include / Exclude' selected), REC/EMS Contact (person icon and 'Enter Party Name'), Consultant (person icon and 'Enter Party Name'), Administrator (person icon and 'Enter Party Name'), Approval # (text input), Sponsor (person icon and 'Enter Party Name'), Agency (person icon and 'Enter Party Name'), Project # (list icon and 'Enter PRJxxxx'), Due Date (dropdown menu with 'Permit' selected, calendar icon, 'from (2015-12-31)', calendar icon, 'to (2015-12-31)'), and Location (dropdown menu with 'Any Location' selected). At the bottom of the filter form are 'Search' and 'Clear' buttons.

Alert! A Permit may require multiple deliverables which must be completed on time as mandated by the federal/provincial regulators in order for Transportation to remain in compliance. These deliverables are to be uploaded into the ERTA system.

Hint: The required permits for the project are identified by the Environmental Consultants engaged during the planning, design and post construction phases.

Permit Checklist

Permits must be linked to an environmental project. Once a project is created you can create permits from the project's module or directly enter permits through the permits module, linking to the environmental project number. Linking to the project number allows for specific information to be inherited from the project.

Inherited from the Project

- ◆ Location Tab - additional location information such as structure, or LRS can be added for the specific permit.
- ◆ Permit screen fields: Location and Contact Information, Consultant and Agreement fields.

Required/Mandatory

- ◆ Regulator, Permit Type
- ◆ Location Description: General location description of permitted area
- ◆ Status: In Progress, Submitted, Issued (permit, LOA or Statement of) Cancelled, Amendment Pending, Completed.
- ◆ Issued Date, Expiry Date, Approval #: these fields are dependent on the type of permit selected. e.g. Water Act Approval requires approval number & expiry date when status is set to issued.

Alert! Use the **Locations Tab** to add more specific locations such as Legal Land Location, UTM, Structure, LRS, and Intersection.(used for the mapping feature - a future enhancement)

Naming Convention Protocols

The following are a list of recommendations when adding permits and their associated documents. These recommendations are intended to provide consistency with the data being entered by various consultants across the province.

Table 4.1 Naming Convention Protocols

Link	Description
Permit Description	Identify what the permit is for; a location Identifier; and briefly what it for. <i>E.g. BF72186 South Wandering River, Bridge Construction</i>
Permit Location Description	General Description of where the permit is located. E.g Hwy 63:04KM 5.518, Entire Hwy 63:02/04 Project Area
User Comments:	Optional
Documents	Filename must reflect the content of the file.

Create Permits

The Consultant shall start updating ERTA with the completion of the draft applications. Once the Permits have been issued the Consultant will update ERTA to reflect the current Permit Status.

There are two ways to create a new permit and the permit must link to an environmental project.

1. From the Project tab.
2. From the Permit tab.

Figure 4.6 Create Permit screen - Mandatory fields

The screenshot shows the 'Create Permit' form with several error messages at the top:

- 'Permit Description' is invalid. Value must be specified.
- 'Regulator' is invalid. Value must be specified.
- 'Type' is invalid. Value must be specified.

 The form includes tabs for 'Permit', 'Locations', 'Dates', and 'Documents'. The 'Permit' tab is active. Fields include:

- Permit # (text input)
- Env Project (dropdown menu showing '10')
- Regulator* (dropdown menu showing 'Please Choose')
- Type* (dropdown menu showing 'Select Type')
- Approval # (text input)
- Town (checkbox and dropdown menu)
- CMA (checkbox and dropdown menu showing 'CMA07')
- District (checkbox and dropdown menu showing 'FORT MCMURRAY')
- Region* (checkbox and dropdown menu showing 'FORT MCMURRAY R...')
- AT Administrator (checkbox and name 'Miranda Ro')
- REC/EMS Contact* (checkbox and name 'Stephen Le')
- Project Sponsor (checkbox and name 'Rizwan Hus')
- Non Compliance (checkbox)
- Consultants (table with columns: Active, Consultant, Agreement, Added By)
- Issued Date (calendar icon and date '(2015-12-31)')
- Expiry Date (calendar icon and date '(2015-12-31)')
- Permit Description* (large text area)
- Status* (dropdown menu showing 'In Progress')

Alert! The inherited fields can be overridden if required, by de-selecting the check mark.

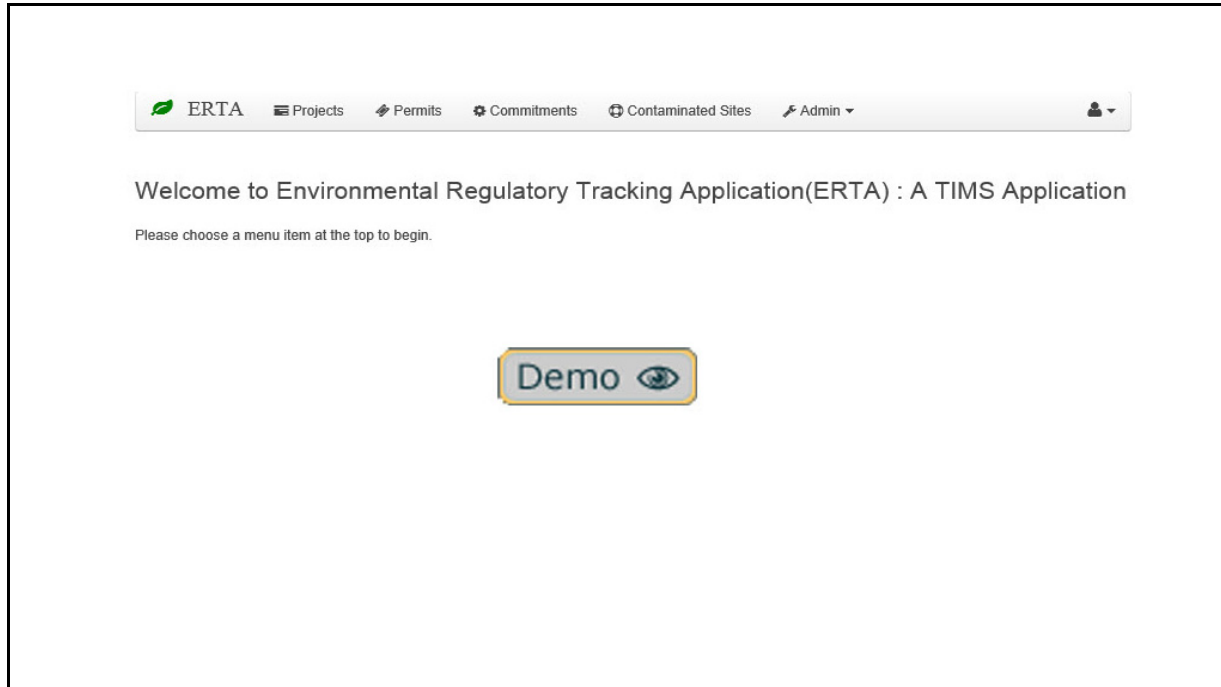
Alert! The only fields needed when creating a permit linked to a project is: Regulator, Type, Permit Description.

Alert! The Approval #, Issued Date, and Expired Date fields are dependent on the permit Type and the selected Status.

Demo Create a Permit

This demo will take you through how to create a new permit with a status of In Progress and link it to an Environmental project.

Demo 4.1 Create a Permit with a Status of In Progress



How To

1. Login to **ERTA**.
2. Click on the **Permit** Tab.
3. Click on the **Create** button.
4. On the *Create* Permit screen, Enter/search for Env Project number.
5. Select Regulator body and Permit Type. e.g. AB Environment and Water Act Approval
6. Enter Description.
7. Select Status to **In Progress**.
8. **Upload** permit documents.
9. **Save** the Permit.
10. Click **Save**.

See: Permits can be created from the Project module.

Permit Dates

Based on the Type of Permit and the status of a permit, the Approval #, Issued Date and Expiry Date fields will become mandatory.

For example, for the Permit Type - Water Act, with the Status of Issued, mandatory fields are:

- ◆ Approval # - Regulator issued approval number
- ◆ Issued Date
- ◆ Expiry Date

Figure 4.7 Entering Permit Dates - Issued and Expiry Dates

The screenshot shows a form with the following fields and values:

- Consultants: Add Consultant
- Active:
- Consultant: ABC Company
- Agreement: CE13506
- Issued Date: (2015-12-31)
- Expiry Date: (2015-12-31)

Hint: Entering the Permit Expiry Date will automatically create a milestone on the Date tab.

Figure 4.8 Milestones and Email Notifications

The screenshot shows the 'Dates' tab with the following table:

Permit #	Expiry Date	Location Description	Type	Start Date	Due Date	Completion Date	Compliance?	Notify by Email?	Notify Who	Comment
54	14-Feb-2020	Displays in Summary location o...	Permit Expiry		14-Feb-2020		N	Y	Kate Martyniuk, Glenn Drinkill	Permit expiry

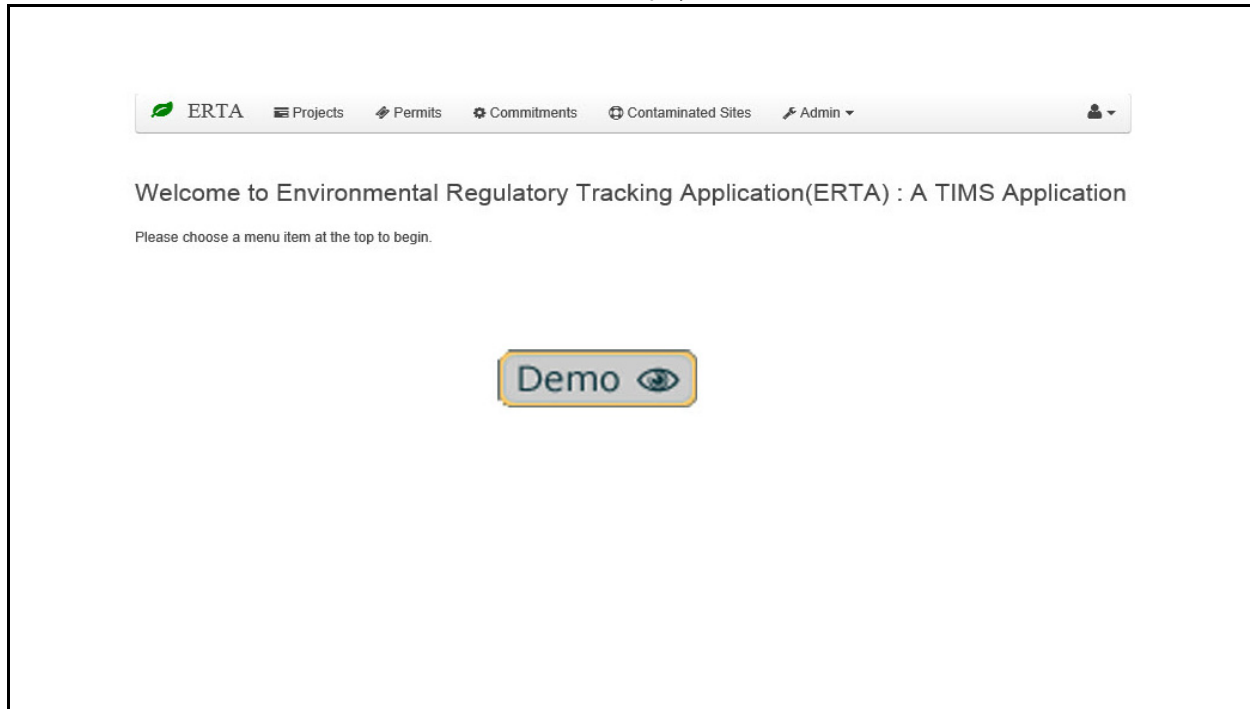
Alert! The *Dates* tab is used to setup an email notification to one or more people and enter completion dates for permits with a status of completed.

See: Notifications are sent out 60 days prior to the due date and then once every 30 days. Refer to **Chapter 2: Notification Emails** for more details.

Demo Edit a Permit - Expiry Date

This demo will take you through how to edit a permits status from Submitted to Issued, enter the expiry date and setup up an email notification on the milestone.

Demo 4.2 Permit issued with Expiry date.



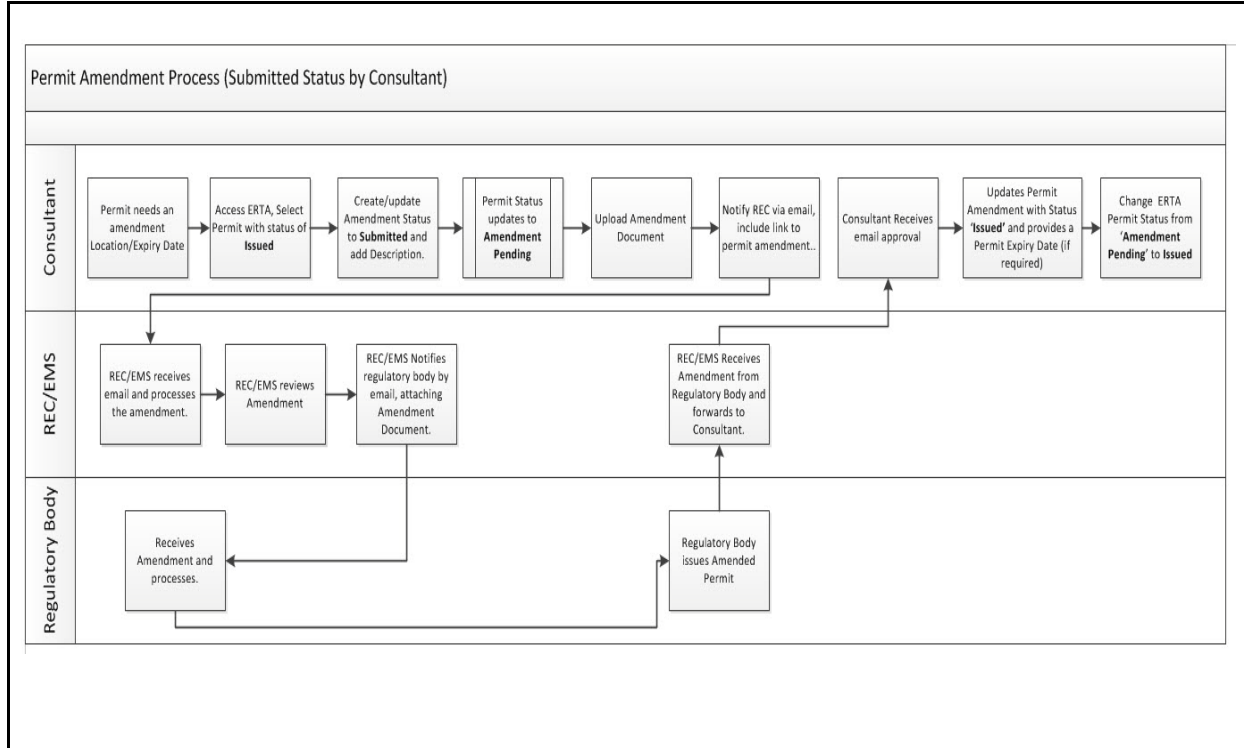
How To

1. Login to **ERTA**.
2. Click on the **Permit** Tab.
3. **Search** Permit with a status of Submitted or associated project number.
4. **Upload** permit approval documents.
5. **Edit** Permit to change status to Issued.
6. Enter the Permit Expiry Date.
7. Click on **Save** button.
8. Click on the **Dates** tab and setup an email notification for milestones.
9. Click on the **Update** button.
10. Click **Save** button to save the record changes.

Amendment Workflow

The amendment workflow is set to capture the history of changes made to a permit status and amendments status.

Figure 4.9 Consultant ERTA Status 'Submitted'



Amendments

Amendments should only be created for permits that have a status of Issued. Changes that may occur to a permit as an example; a change in the location or the expiry date. Multiple amendments may be raised for a single permit. A system message will display once an amendment has been created with the status of In Progress or Submitted.

Search for your required permit and click on the **Amendments** tab and then the **Edit** button. Click on the **Create** button to display the *Create Permit Amendment* screen.

Figure 4.10 Create Permit Amendment screen.

The screenshot shows a web form titled "Create Permit Amendment". It contains the following elements:

- Amendment #**: A text input field.
- Status***: A dropdown menu currently set to "In Progress".
- Issue Date**: A date picker showing "2015-12-31".
- Expiry Date**: A date picker showing "2015-12-31".
- Description***: A large text area for entering details.
- Buttons**: "Update" (blue) and "Cancel" (grey).

Hint: The *Amendment* tab only appears when required. It will not appear for status of In progress or submitted.

Hint: When the status of the Amendment is changed to **Submitted**, the Permit Status is changed to Amendment Pending and a message is displayed when record saved.

When an amendment is canceled or status is changed to Issued, the System message below will disappear, but will appear when permit status is set to Amendment Pending.

Figure 4.11 System Message Pending Amendments

The screenshot shows a system message area with a yellow background and orange text that reads "Permit has pending Amendments." Below the message is a navigation bar with several tabs: "Permit" (highlighted in blue), "Commitments", "Locations", "Dates", "Documents", "Amendments", and "History".

Alert! When approval is approved on an amendment, the Consultant must change the permit status back to Issued from Pending Amendment.

Figure 4.12 Permit Issued and Expiry Date assigned

The screenshot shows the 'Edit Permit Amendment' form. At the top, there is a red error message: "'Expiry Date' is invalid. Value must be specified when Status is 'Issued'." Below this, the form contains the following fields:

Amendment #	1	Status	1	Issued
Issue Date	(2015-12-3)	Expiry Date	(2015-12-31)	
Description	change to location			

At the bottom right of the form, there are two buttons: 'Update' and 'Cancel'.

Alert! On the Amendment screen, changing the status to **Issued**; makes the **Permit Expiry Date** field mandatory.

Alert! The Amendment **Issue Date** should be entered. This does not change the original Permit Issued date on the Permit screen.

Hint: To change the **Expiry Date** on a permit amendment milestone (Date tab), the date can be entered in the Expiry date field from the Permit screen. This does NOT update the expiry date on the amendment.

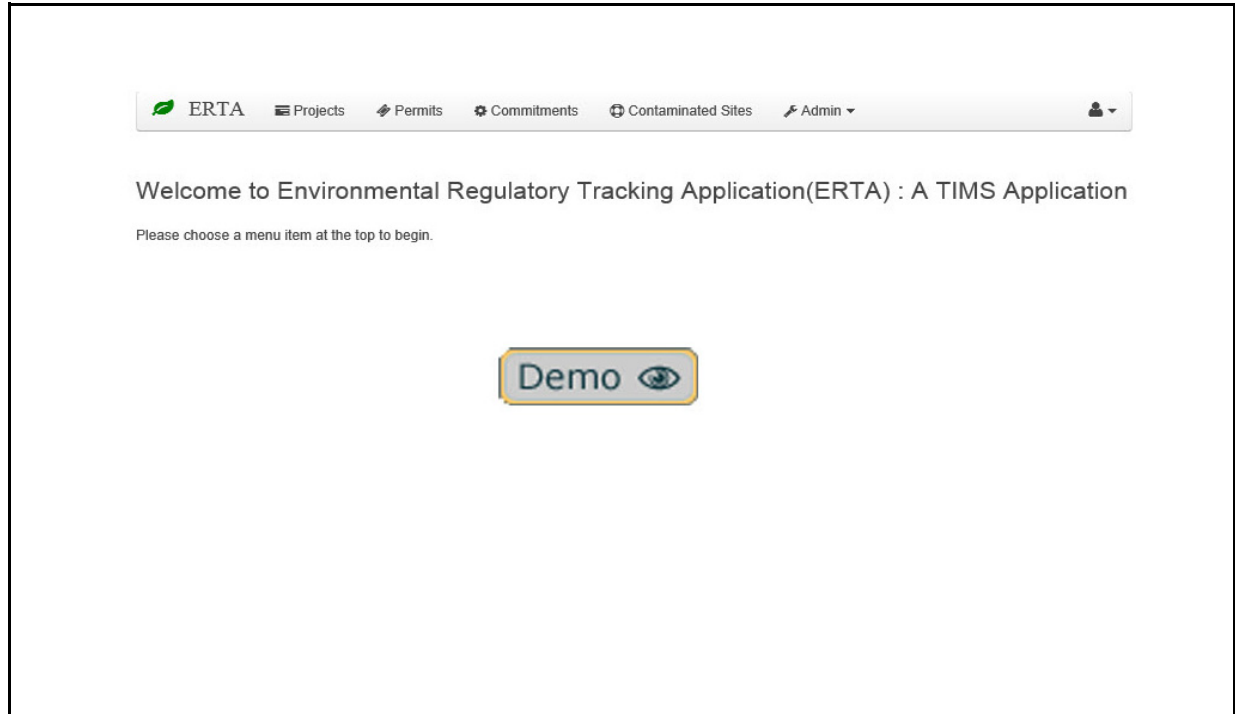
Deleting Amendments

Only the REC/EMS can delete an amendment where the status has never been set to issued or submitted. If an amendment is deleted, it deletes all associated amendment documents.

Demo Create an Amendment

This demo will take you through how to create an amendment for a new expiry date for an issued permit.

Demo 4.3 Create an Amendment.



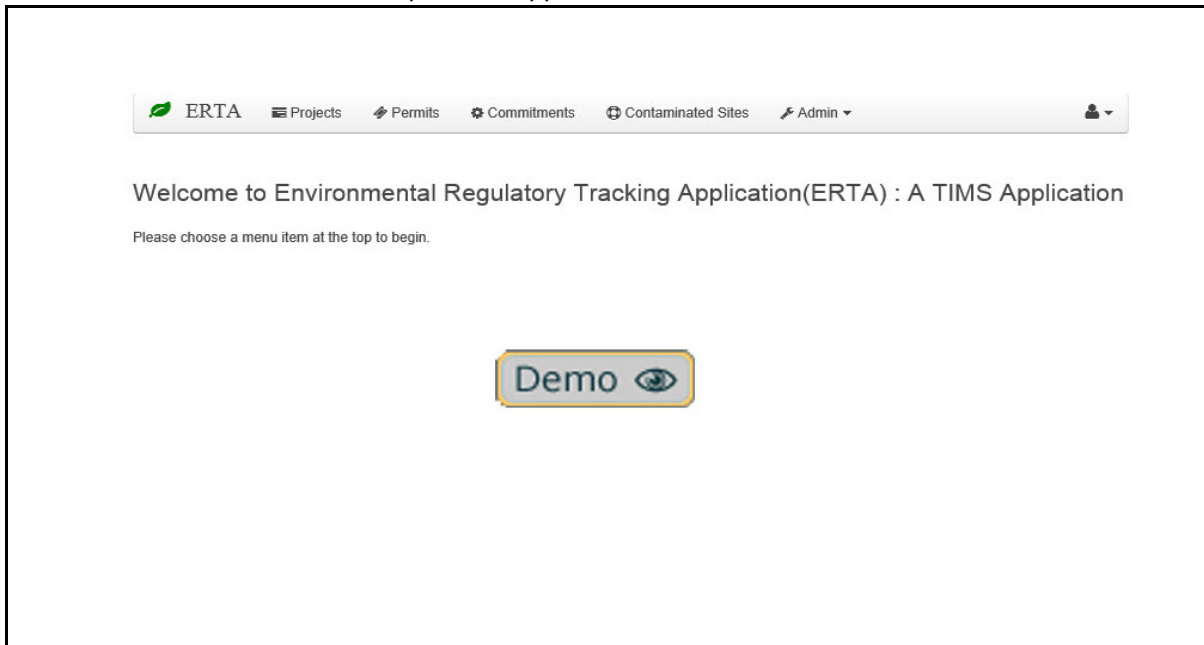
How To

1. Login to **ERTA**.
2. Click on the **Permit** Tab.
3. Search for Permit with status of Issued.
4. **Edit** Permit.
5. Click on **Amendment** Tab, click on **Create**.
6. Set Amendment Status to In progress or Submitted.
7. Upload the Amended document(s).
8. Click **Update**.
9. Click **Save**.
10. Notify the REC/EMS via email that Amendment is ready for review and submission for approval.

Demo Update an Approved Amendment

This demo will take you through how to search for the permit with pending amendments, update the amendment with new expiry date and status, and change the status of the permit to Issued from Amendment Pending.

Demo 4.4 Update an Approved Amendment.



How To

1. Login to **ERTA**.
2. Click on the **Permit** Tab.
3. Search for Permit with status of **Amendment Pending**.
4. Select the Permit and click on the **Edit** button.
5. Click on the **Amendments** Tab.
6. Click on the **Edit** button to update the Amendment.
7. Set Amendment Status to **Issued**.
8. Input the Issued Date and the new Expiry date.
9. Upload the Amendment Response document(s).
10. Click on the **Permits** tab, if required, change the approval number.
11. Update the Issued date and the Expiry date.
12. Update the Permit Status from Amendment Pending to Issued.
13. Click **Save**.

Complete Permits

Once the permit package has been issued, the environmental consultant will update ERTA to reflect the current status of the permits and any amendments pertaining to the required permits. Once a permit is completed, the status is updated to reflect the completion of the permit.

Figure 4.13 Edit Permit screen.

The screenshot displays the 'Create Permit' form with the following fields and options:

- Permit #**: Text input field.
- Type**: Dropdown menu with 'Select Type' selected.
- PMA Project #**: Text input field with a search icon.
- Approval #**: Text input field.
- Consultants**: Section with 'Add Consultant' link and a list containing 'Tetra Tech EBA Inc.' with a search icon.
- Issued Date**: Date picker set to (2015-12-31).
- Expiry Date**: Date picker set to (2015-12-31).
- Permit Description**: Large text area.
- Status**: Dropdown menu with 'In Progress' selected.
- Location Description**: Text input field.
- User Comments**: Text input field.
- Town**: Dropdown menu with 'Select Town' selected.
- CMA**: Dropdown menu with 'Select CMA' selected.
- District**: Dropdown menu with 'Select District' selected.
- Region**: Dropdown menu with 'Select Region' selected.
- AT Administrator**: Text input field with 'Enter Party Name' placeholder.
- REC/EMS Contact**: Text input field with 'Enter Party Name' placeholder.
- Project Sponsor**: Text input field with 'Enter Party Name' placeholder.
- Regulator**: Text input field with 'Enter Party Name' placeholder.
- Non Compliance**: Checkbox.
- Contract #**: Text input field with a search icon and 'Enter Contract Bus Id' placeholder.

Buttons at the bottom include 'Save' and 'Cancel'.

How to Complete Permits

Search for a permit that is has been completed and update the status. Use the Dates tab to enter the completion date and change the status.

How To

1. Login to ERTA.
 2. Click on the **Permits** tab.
 3. Enter your search criteria to locate the permit that you need to edit.
 4. Click on the Permit that needs to edited.
 5. Click on the **Edit** button.
 6. Update the Status field to **Completed**.
 7. Click on the **Dates** tab.
 8. Update the completion date
 9. **Save/update** as required.
-

System Notifications

Notifications in ERTA allow tracking of permits as milestones are created. When a permit is issued and the expiry date is entered, the *Date* tab is updated with the milestone. The consultant must edit the milestone and provide who will be notified by email. Click on the **Edit** button, click on the **Date** tab, click on the **Edit** icon and add the Notify who by Email information.

Figure 4.14 Permit Setup Notifications Screen.

Edit Permit

Permit Commitments Locations **Dates** Documents Amendments History

Permit #	Expiry Date	23-Sep-2020		Location Description			
75							

Type	Start Date	Due Date	Completion Date	Compliance?	Notify by Email?	Notify Who	Comment
Permit Expiry		23-Sep-2020		N	Y	Sylvia de Bruyn, Kate Martyniuk	Permit expiry

Save Cancel

Alert! More than one person can be setup to receive an email notification.

See: Refer to Chapter 2: Overview of Screens - notification emails.

When a permit has a pending amendment (status of In progress or submitted) the following message is displayed.

Figure 4.15 Permit with Pending Amendments Screen.

Search Permits

Edit Permit

Permit has pending Amendments.

Permit Commitments Locations Dates Documents **Amendments** History

History is tracked for any changes that are made to the permit. Clicking on the *History* tab will display all changes to the permit from the date the permit was created.

Figure 4.16 History of Permit changes.

Edit Permit

Permit Commitments Locations Dates Documents Amendments **History**

Permit #	75	Expiry Date	31-Oct-2025	Location Description
Date	User	Description		
23-Sep-2019 1:15	Roberta Baker	Changed Permit Description from 'ready for review' to 'Landfill permit for doing something to a land...		
23-Sep-2019 1:14	Roberta Baker	Changed Description for Amendment 1 from 'need to change location of permit' to 'approved and issued...' Changed Expiry Date from "" to '31-OCT-2025' Changed Status for Amendment 1 from 'Submitted' to 'Issued'		
23-Sep-2018 1:09	Roberta Baker	Added Amendment '1' Changed Status from 'Issued (Permit, LOA or Statement of no Concern)' to 'Amendment Pending'		
23-Sep-2016 10:55	Roberta Baker	Changed Approval # from "" to '123456-00-00' Changed Expiry Date from "" to '23-SEP-2020' Changed Issued Date from "" to '26-SEP-2016' Changed Status from 'Submitted' to 'Issued (Permit, LOA or Statement of no Concern)'		
23-Sep-2016 10:53	Roberta Baker	Changed Permit Description from 'New permit' to 'ready for review' Changed Status from 'In Progress' to 'Submitted'		
23-Sep-2016 10:53	Roberta Baker	Created Environmental Permit		

Chapter 5: Commitments

This chapter covers how to enter information into ERTA following a recommended workflow.

Topics in Chapter:

1. Overview of Commitments
2. Business Workflow
3. Create Commitments and uploading associated documents
4. Commitment Dates and Notifications
5. Create Commitments for a Release or Spill
6. Edit Commitments
7. System Notifications

Commitments

Commitments are identified during the planning, and design phases of a project. The Environmental consultants engaged during the planning and design phase are responsible for recording the commitments and all associated documents in the ERTA application.

During the construction phase the consultant and REC will monitor the commitments and ensure that the data in ERTA reflects the correct status of commitments.

ERTA is not designed to track all the tasks necessary to complete the Commitments. The Consultant is responsible for the execution and separate tracking of the associated tasks required to identify required commitments.

What is a Commitment?

Commitments are Departmental obligations, or other actions required to meet (non-permitted) regulatory requirements. E.g. implementation of mitigation measures to address a species at risk. Commitments can be linked to a specific permit or environmental project but not both.

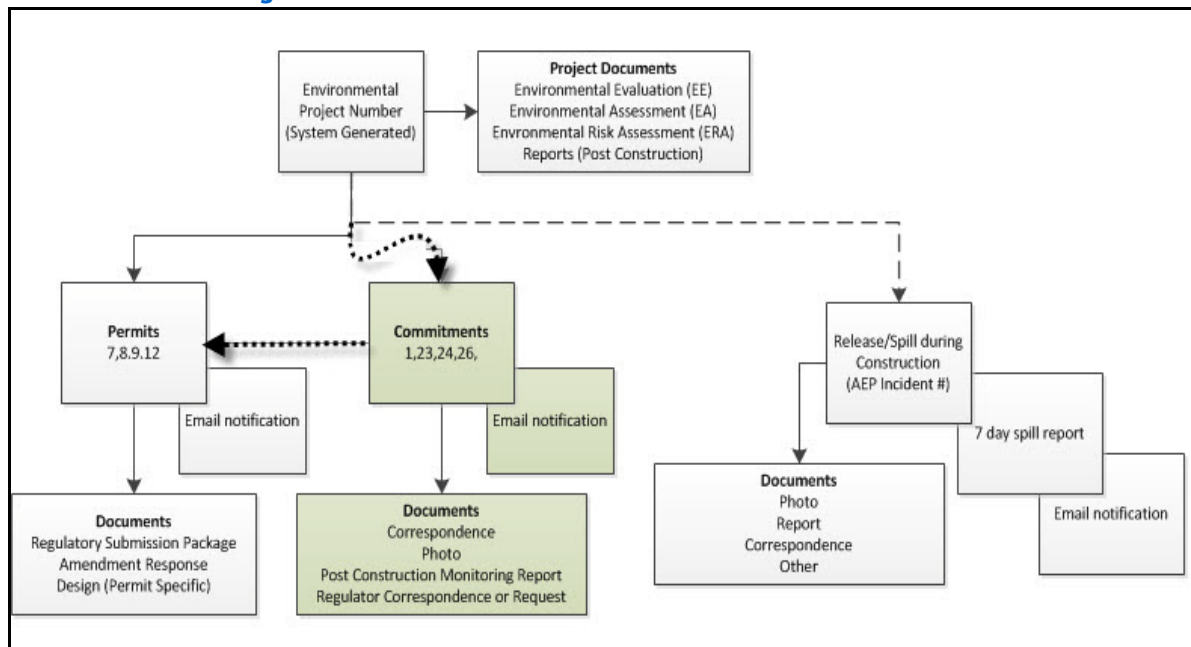
Who Uses this info?

Alberta Transportation Project Administrators and Regional Environmental Coordinators are ultimately responsible for tracking multiple commitments across multiple projects and the ERTA application will assist with the current and historical inquiries from legislator's. It is essential that the department have all pertinent Commitments; and their associated documentation; pro-actively managed to avoid non compliance.

Business Workflow

The environmental consultant will be responsible for entering the Commitments related to the project. Commitments can be created from the Projects Module and attached to a specific permit OR Environmental Project.

Figure 5.1 Commitments - Email Notifications - Documents



Alert! Commitments must be linked to an Environmental Project **OR** a Permit, but not both.

Alert! It is optional for a Release/Spill commitment to be linked to an environmental project.

Commitments

Commitments are identified by consultants during the Design, Construction and through Post Construction phases. These Commitments are recorded and executed by the consultant. A commitment may require multiple deliverables that must be completed on time in order for the Department to remain in compliance.

Commitments are also used to record a Release or a Spill. The Release/Spill must have a valid AEP Incident # when recorded in ERTA.

Figure 5.2 Commitment Screen - Link to Project OR Permit

The screenshot shows a web form titled "Create Commitment". It features three input fields: "Release/Spill" with a dropdown menu set to "No", "Env Project" with a search icon and the placeholder text "Enter Env Proj id", and "Permit #" with a search icon and the placeholder text "Type Permit #". At the bottom right, there are two buttons: a green "+ Create" button and a grey "Cancel" button with a circular arrow icon.

Figure 5.3 Commitment - Release/Spill - AEP

The screenshot shows the "Create Commitment" form with "Release/Spill" set to "Yes". Below this, the text "AT" is displayed. The "Responsibility" field is a dropdown menu set to "Alberta Transportation". There is a checked checkbox labeled "AEP Initiated" and an empty text input field for "AEP Incident #". Below the input field, the text "Call 1-800-222-6514 to obtain the incident #" is displayed. At the bottom right, there are two buttons: a green "+ Create" button and a grey "Cancel" button with a circular arrow icon.

Figure 5.4 Commitment Screen - Link to Permit or Environmental Project

Create Commitment

Commitment Locations Dates Documents

Commitment #

Permit # ⓘ

Env Project

Release/Spill No

Town

CMA

District

Region*

AT Administrator Wing Choy

REC/EMS Contact* Kate Martyniuk

Post Const
 Commitment

Deferred to Future
 Project

Override Proj
Distance (m)

Consultants [Add Consultant](#)

Active	Consultant	Agreement	Added By
<input checked="" type="checkbox"/>	Engineering Associates <input checked="" type="checkbox"/>	CE09009 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Hint: Inheritance of fields from Permit, Environmental Project or Contaminated Site. E.g. Location Tab (LLD, LRS etc), Location Information, Contact Information, Consultant and Agreement data.

Alert! Post Construction Monitoring Commitments can be flagged with choosing the **Post Constr Commitment** option.

Alert! When the REC sets up a Regional Consultant to perform Post Construction Monitoring, ERTA will automatically add that consultant to all commitments marked as Post Construction in the selected Regional Area.

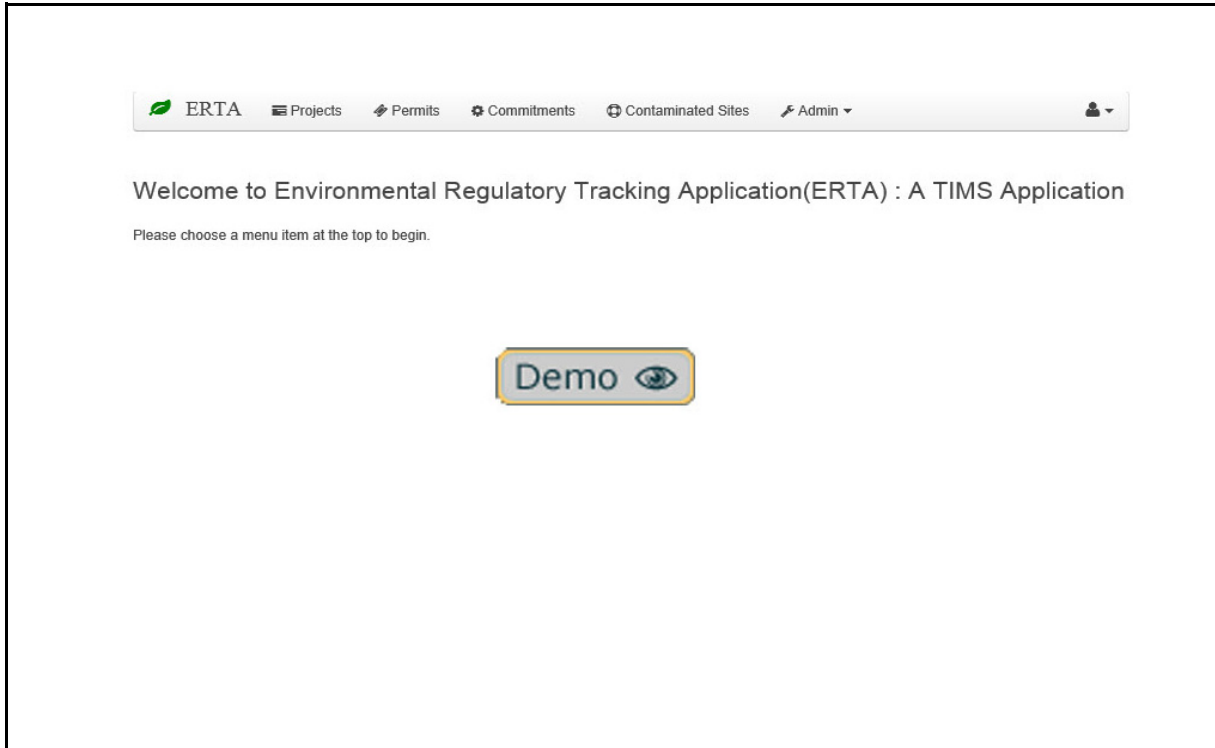
Alert! Commitments can be deferred to future projects by choosing the **Deferred to Future Project** option.

Hint: A Commitment can have more than one location. e.g. Legal Land Location, Highway Control Section, Intersection, Structure (bridge) or a UTM.

Demo Create a Commitment

This demo will show how to create a Commitment with a due date and setup the milestone with an email notification.

Demo 5.1 Create a Commitment



How To

1. Login to ERTA.
2. Click on the Commitment tab or search for the associated project or permit.
3. Click on the **Create** button.
4. Enter the associated project OR Permit number, but not both.
5. Click on the **Create** button.
6. Fill in the mandatory fields and set due date.
7. Review location tab and update as required.
8. Click on *Dates* tab and **Edit** button to setup Notify by Email field.
9. Click on **Update** button.
10. Click on Save.

Commitment Dates

There could be multiple milestones to complete for the Commitment that have a start date and due date (expected completion) with email notifications. Click on the *Date* tab to add additional milestones.

When you add a commitment Due Date, it will automatically add the milestone to the Date tab. Click on the *Date* tab to setup the email notification. Email notifications are setup by the consultant.

To complete a Commitment, the Due Date and Completion Dates can be added from the main commitment screen, but email notifications have to be added from the *Date* Tab. Similar to Permit email notifications.

Figure 5.5 Commitment Dates - Status and Due Date

Due Date 2016-10-31 Completion Date (2015-12-31)

Commitment Description * Post Construction Fish Sampling La Biche River. Sampling at Northern Pike habitat c impacts to fish habitat at 3 crossings along Highway 63:02.

Status **2** * In Progress ▾

Figure 5.6 Edit Permit Dates and Email Notifications.

Edit Commitment

Commitment Locations **Dates** Documents History

Commitment Id	Due Date	Location Description
11	31-Oct-2016	La Biche River

[+ Create](#)

Type	Start Date	Due Date	Completion Date	Compliance	Notify by Email	Notify Who	Comment
Commitment Due		31-Oct-2016		N	Y	Roberta Baker	Commitment due

[Save](#) [Cancel](#)

Alert! An email notification will be sent 60 days in advance of the due date. The setting for the email notification can be changed by the ERTA Administrator.

Alert! When a completion date is entered, an email that includes links to the commitment(s) is sent to the person setup in **Notify by email**. Remember to change status to Completed.

Create Release/Spill Commitments

During Construction, a spill or release of a contaminant must be recorded in ERTA. These are recorded and tracked as a Commitment with a notification email being setup. It is optional for a Release or Spill to be associated to an environmental project. However, if related to a project there is no inheritance of data, so there are a number of mandatory fields that need to be entered.

To create a release, click on the **Create** button and then select **Yes** to enter a Release/Spill record.

Figure 5.7 Create Releases or Spill and 7 Day Report Milestone

The screenshot shows the 'Create Commitment' form in the TIMS system. The form is titled 'Create Commitment' and has tabs for 'Commitment', 'Locations', 'Dates', and 'Documents'. The 'Commitment' tab is active. The form contains several input fields and dropdown menus: 'AEP Incident #' (0003-000345-001), 'Town' (dropdown), 'AT Administrator' (Enter Party Name), 'Env Project' (dropdown with search), 'CMA' (Select CMA), 'REC/EMS Contact*' (Enter Party Name), 'AT View Only' (checkbox), 'District' (Select District), 'Release/Spill Yes' (checkbox), 'Region*' (Select Region), 'Consultants' (Add Consultant), a table with columns 'Active', 'Consultant', 'Agreement', and 'Added By', 'Incident Type' (Select), 'AEP Initiated' (checkbox), 'Resp. for 7 day report' (Alberta Transportation), 'Spill Identified Date' (calendar icon, 2015-12-31), 'Resp. Organization' (Enter Party Name), 'Resp. Consultant' (Enter Party Name), 'Resp. Insurance' (Enter Party Name), and two sections for 'Resp. Organization' and 'Resp. Consultant' with text input and 'Comments' labels.

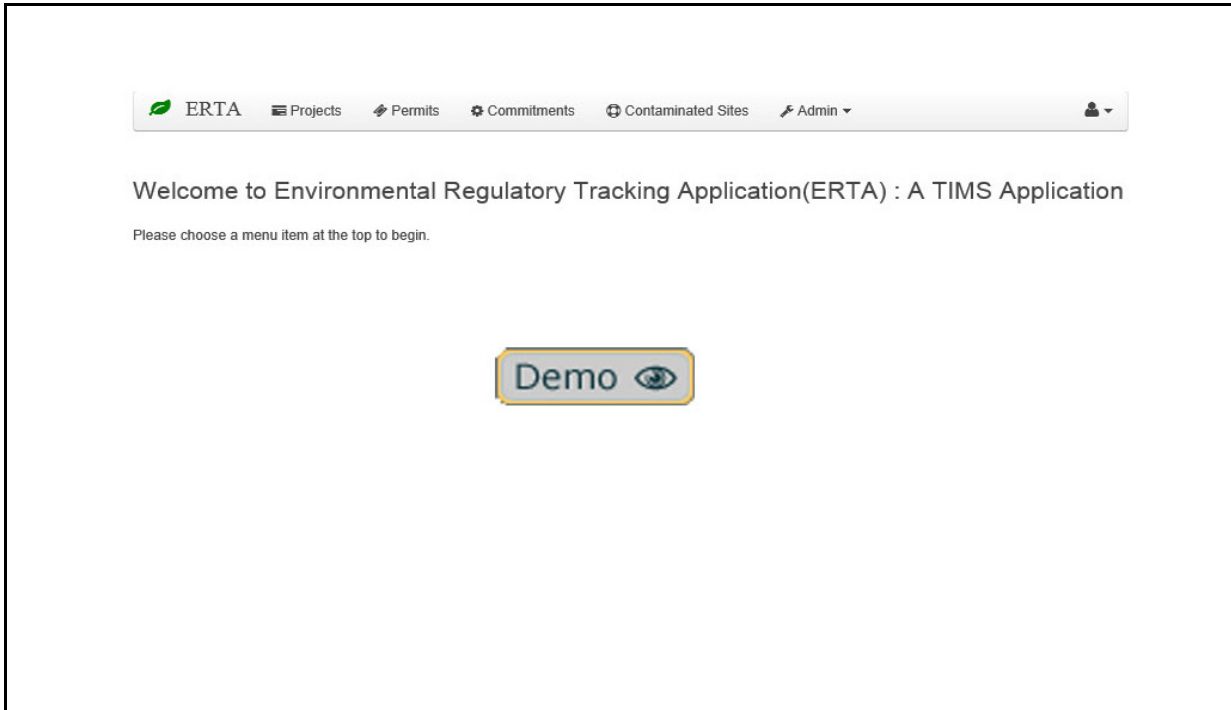
Alert! A Release/Spill can be associated to an Environmental project by adding the project number, however, there is no inheritance of data from the project.

Hint: Mandatory fields: AEP Incident#; Region; REC/EMS Contact; Consultant, Agreement; Locations Tab; Dates Tab for 7 day Spill Report.

Demo - Create Release/Spill

This demo will show how to create a Release/Spill that requires a 7 day Spill Report and uploading of associated documents.

Demo 5.2 Create a Commitment for Release/Spill



How To

1. Login to ERTA.
2. Click on the Commitment tab or search for the associated project or permit.
3. Click on the **Create** button to create Commitment.
4. Select **Yes**.
5. Enter **AEP Incident #**.
6. Click on the **Create** button.
7. Fill in the mandatory fields and set due date.
8. Review *Locations* tab and update with at least 1 location.
9. Click on *Dates* tab and **Edit** button to setup Notify by Email field and setup the 7 day report due date.
10. Click on **Update** button.
11. Click on Save.

Chapter 6: Contaminated Sites

This chapter covers how to enter information into ERTA following a recommended workflow.

Topics in Chapter:

1. Overview of Contaminated Sites
2. Managing Regional Consultants
3. Business Workflow
4. Create a Contaminated Site

Contaminated Sites

The Environmental Management Services (EMS) section of Alberta Transportation oversees contaminated site assessments and remediation on behalf of the ministry and other GoA departments.

The department is aware of many of these sites and may be responsible for or share responsibility with a landowner to assess and where necessary remediate the site.

The Contamination Management Principles are:

1. Source Control
 - Assess the concentration level of the contaminants
 - Assess the vertical and horizontal extent of the contamination
 - Identify all applicable exposure pathways and receptors
2. Contamination delineation
 - Prevent pollution
 - Identify source if contamination present
 - Source Removal

A Risk Management Plan (RMP) OR a Remediation Action Plan (RAP) will be provided with recommendations for either Site Remediation and/or continued monitoring.

What is a Contaminated Site?

A Contaminated Site describes a location that has contaminations near a provincial right of way or on a highway maintenance yard or property that Transportation has purchased or needs to purchase to build or widen a highway where the property was impacted from previous operations.

Who Uses this Data?

Alberta Transportation's contracted Service Provider(s) will assess the site by the completion of an Environmental Site Assessment (ESA). The user will be responsible for the data entry including creation of the contaminated site and uploading documentation and the managing of the site. It is essential the department have all the sites and their associated documentation managed to avoid non compliance.

Who Sees this Data?

ERTA supports having two different consultants monitoring different types of contaminated sites. The specifics of the users access is setup by the Transportation Staff with the appropriate ERTA security group access.

Managing Regional Consultants

In addition to having consultants and sub-consultants that manage environmental projects, ERTA also allows for various users that manage contaminated sites.

For example, the EMS Consultant monitors the legacy Maintenance Yards, and Regional Consultant would monitor Right of Way Spills Capital Related and 3rd party Contamination type sites and/or performs Post Construction monitoring.

Figure 6.1 Maintain Regional Consultant - Transportation Staff Specifies Based on Agreement

Agreement*	Consultant	Region*	Contaminated Site Types	Post Const.	REC Support
CON0014408	ABC Company	NORTH CENTRAL REGION	7 items selected	<input type="checkbox"/>	<input type="checkbox"/>
CON0016627	XYZ Company	NORTH CENTRAL REGION	<input type="checkbox"/> ALL <input type="checkbox"/> NONE		
CON0015553	Associated RB Company	SOUTHERN REGION	<input checked="" type="checkbox"/> Maintenance Yard - Never GOA o...		<input checked="" type="checkbox"/> Property Acquisition
CON0015554	Total Quality Company	CENTRAL REGION	<input checked="" type="checkbox"/> Maintenance Yard - GOA ownersh...		<input checked="" type="checkbox"/> Property Disposal
CON0015556	Engineering Associates	NORTH CENTRAL REGION	<input checked="" type="checkbox"/> Maintenance Yard - Shared GOA ...		<input type="checkbox"/> 3rd Party Contamination
			<input checked="" type="checkbox"/> Right of Way spill		<input checked="" type="checkbox"/> Provincial Government Owned
			<input type="checkbox"/> Capital Related		

See: Transportation Staff (REC/EMS) use the Maintain Regional Consultant screen to setup data access for contaminated site, post construction monitoring and Regional support.

Figure 6.2 Multiple Consultants on a Contaminated Site

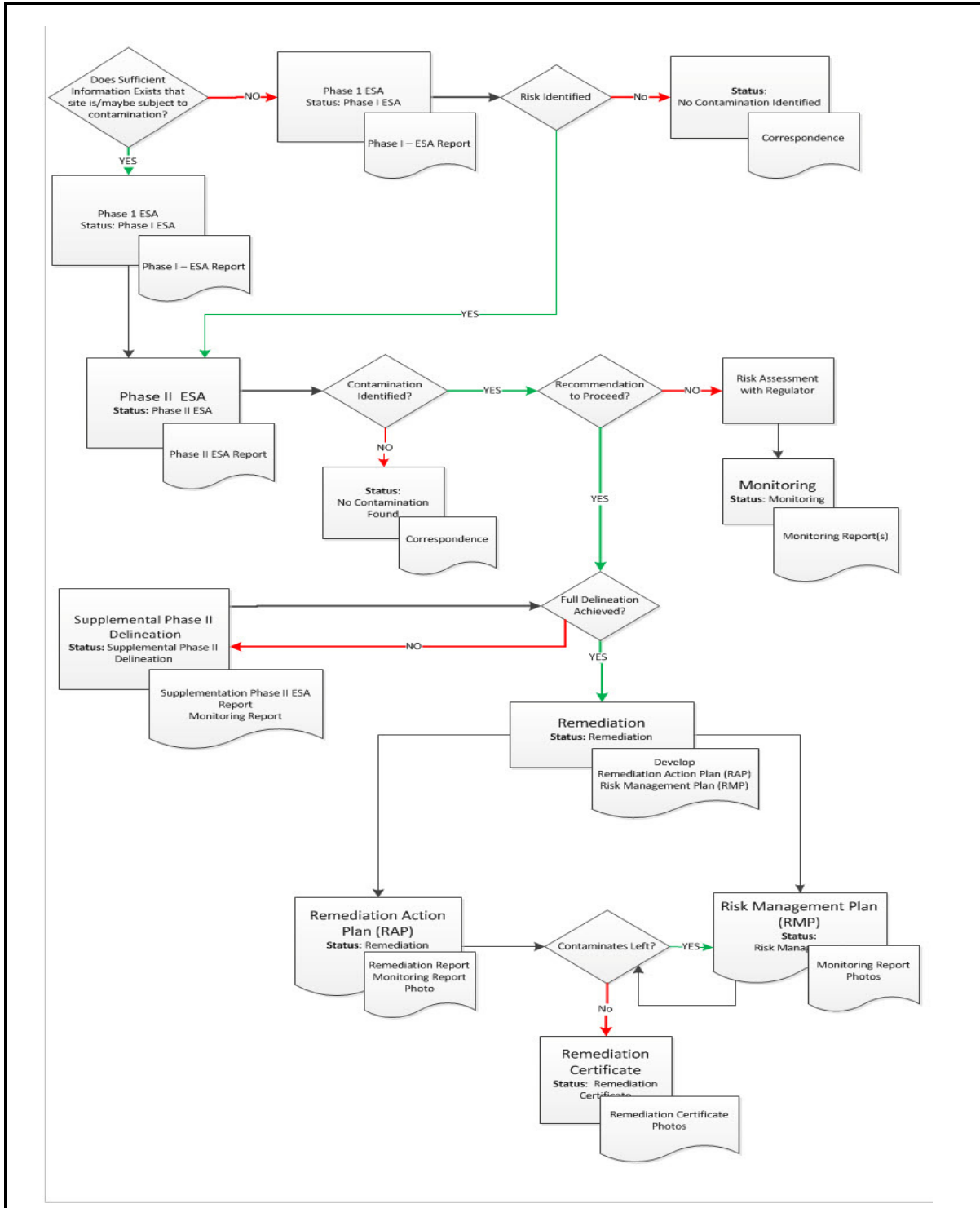
Consultants Add Consultant						
	Active	Consultant	Agreement	Added By		
	<input checked="" type="checkbox"/>	ABC Company	CE04309	13-Oct-2016	Kate Martyniuk	
	<input checked="" type="checkbox"/>	ABC Company	CON0012191	13-Sep-2016	Glenn Drinkill	
	<input checked="" type="checkbox"/>	XYZ Company	CON0016627	29-Apr-2016	John Smith	

Alert! As long as the agreement is active, the Regional Consultant(s) will have edit and view access to all content on the contaminated site.

Business Workflow

A contaminated site has a life cycle starting with 'Phase I ESA' and ending with 'Remediation Certificate' or 'No Contamination Found'.

Figure 6.3 Consultant Work flow for Updating ERTA



Contaminated Sites

The ERTA application will support Contaminated Sites, including multiple location(s), all documentation and a comment history describing what interventions and communications have occurred or are planned.

The user will be responsible for creating and updating the site data and all associated documentation.

Right of Way Spills When an accident results in a spill occurs the appropriate Transportation staff would be receive a notification of a spill and receive a Provincial Highway Spill/Damage Report.

Best practices to follow when entering Right of Way Spills:

- ◆ Enter record into ERTA
 - Provincial Highway spill/damage Report is received, if it contains all the mandatory field information, enter into ERTA.
 - The proposed Traffic Accommodation Strategy (TAS) should have enough information to enter the record into ERTA.
- ◆ Select Status: Remediation, Risk Management, and Monitoring
- ◆ Upload the associated Documents example: Spill Report, TAS, Remediation Report, Monitoring Report, Risk Management Plan or Risk Action Plan. (This is not an inclusive list)
- ◆ Site Description: Always provide a site description that provides a summary of what happened at the site, what is currently happening and any items to note that were in the most recent report's conclusions and important dates.
 - Incident Reports 'Event Number' must be included in the Site Description Field. e.g. Event Number 17249
- ◆ Location Description: Location identifiers are very important. Enter Residential Address, Full Legal: Plan/Block/Lot, Bounding properties, GPS, LLD. Any and all information that will assist in accurately locating the site must be entered.

Highway Maintenance Yards (HMY)

Alert! For Highway Maintenance Yards (HMY), Property Acquisition, Property Disposal, Legacy Maintenance Yards, they will follow the Environmental Site Assessment Process (Phase I ESA/Phase II ESA).

Create a Contaminated Site

The Contaminated Site module is where you create, edit and search for sites. To create a new site, click on the **Create** button. It is important that you have all the mandatory information available prior to saving the record.

Figure 6.4 Create Contaminated Site Screen - Mandatory Fields

The screenshot shows the 'Create Contaminated Site' form with several error messages at the top:

- Contaminated Site must have at least one Legal Land Location defined.
- At least one Consultant must be specified.
- 'Site #' is invalid. Value must be specified.
- 'Site Name' is invalid. Value must be specified.
- 'Site Status' is invalid. Value must be specified.
- 'Type' is invalid. Value must be specified.
- 'REC/EMS Contact' is invalid. Value must be specified.
- 'Region' is invalid. Value must be specified.

 The form fields include:

- Site Name* (text input)
- Site #* (text input)
- Site Status* (dropdown menu)
- Type* (dropdown menu)
- Owner (text input with 'Enter Party Name' placeholder)
- Town (text input)
- REC/EMS Contact* (text input with 'Enter Party Name' placeholder)
- CMA (dropdown menu)
- Insurance (text input with 'Enter Party Name' placeholder)
- District (dropdown menu)
- Region* (dropdown menu)
- Active File (checkbox)
- Rating (text input)
- Remediation Deferred to next Capital Project (checkbox)
- Override Proj (checkbox)
- Distance (m) (text input)
- Consultants (button: Add Consultant)
- Table with columns: Active, Consultant, Agreement, Added By. The Consultant column contains 'Enter Party Name'.
- Site Description (text area)

Table 6.1 Contaminated Sites - Field Definitions

Link	Description
Site Name	Input a general description of the site. e.g. Spill on Hwy 44 in Lesser Slave Lake, or Former GOA HMY - Whitecourt, AB, or George Smithe Property.
Site #	Prefix site # with 1551 followed by LLL. e.g. 1551-SW33-49-26-4 or 1551-SW15&SW23-49-21-5
Active File	Used to flag the contaminated site as either active or inactive.
Rating	Used to identify contaminated sites managed by the REC based on Environmental Risk, Landowners Impacted, Stability of land use or Ownership or PCT.

Table 6.1 Contaminated Sites - Field Definitions

Link	Description
Site Status	Select the appropriate Site Status: Phase I ESA, Phase II ESA, Supplemental Phase II Delineation, Remediation, Monitoring, Risk Management, Remediation Certificate, No Contamination Found.
Site Type	Used to search for a specific type of site. e.g. Maintenance Yard - GOA owned, Right of way spill, Provincial Government Owned.
Region	Select the appropriate Region responsible for site. Once the Region is selected, the REC/EMS Contact field is populated.
Remediation Deferred to next Capital Project.	The remediation of a site can be deferred to the next capital project. The default buffer distance (3000m) will ensure that when a new project is created, this contaminated site will be identified.
Override Project Distance (m)	Enter the override value if you want to enlarge the area from the default butter range of 3000m. The default value can be changed for the entire system by the ERTA Administrator.
REC/EMS Contact	If Region is selected first, this field will automatically update with the Transportation contact person for the region.: If this information is incorrect, use the X button to delete and enter in a new name.
Consultant	This field defaults to the Regional Consultant responsible for the selected Region.
Agreement	Enter the agreement number. Enter a part of the agreement number and select from the list of agreements that appear.
Site Description	This is not a mandatory field, however, always provide a site description that provides a summary of what happened at the site, what is currently happening and any items to note that were in the most recent report's conclusions and important dates. Limit 500 characters.
Location Description	Enter a description of the location and provide at minimum a LLL. Limit is set to 200 characters. e.g. LSD: 16-03-049-03-W5M in Leduc County, AB, GPS 52 12' 20 11'N 114 20' 35 51'W
User Comments	Enter comments relating to the current status of the record, e.g. Phase 1 ESA has been selected.

Hint: Contaminated sites mitigated as part of a future project scope will be marked by consultant as *“Remediation Deferred to next Capital Project”*.

Alert! At least one location is required on the *Locations* Tab. Enter multiple types of locations that will assist in the accurately of locating the site. e.g. LLD, Residential Address, Plan/Block/Lot, Bounding Properties, GPS etc.

Hint: Resources for location finding: maps.google.com; Baseloc.com (connects to lsdfinder.com); Land tracker App for iOS; SPIN2 - <https://alta.registries.gov.ab.ca/spinii/>

Override Default Project Distance

A Contaminated Site can be updated, to defer the remediation of a site to a future Capital Project and override the future project distance default.

Search for the site and then click on the **Edit** button. Select **'Remediation Deferred to next Capital Project'** and then enter the **Override Project Distance** value.

Figure 6.5 Contaminated Site - View Default Override distance



Alert! The default override distance can be changed by the ERTA Administrator, confirm the default value by reviewing the field tip.

Contaminated Site Ratings

Sites can be rated based on the impact of the Environmental Risk, Landowners Impacted, stability of land use or ownership. The Departments consultants will assign a rating as required.

Figure 6.6 Contaminated Site Ratings

Contaminated Site Ratings
✕

Environmental Risk

Environmental Risk

Risk to Human Health 5

Offsite Groundwater and Soil Impacts 4

Offsite Soil Impacts 3

Onsite Groundwater and Soil Impacts 2

Onsite Soil Impacts 1

Stability of Land Use or Ownership

Stability of Land Use or Ownership

Likely to change within the next 5 years 5

Development Potential 1

None 0

Landowners Impacted

Landowners Impacted

Multiple Landowners 5

Onsite and One Offsite 3

Offsite only 2

Onsite only 1

None 0

PCF

PCF

Annual complaints 5

Moderately sensitive to complaints 3

No complaints 0

Land Owners
Create

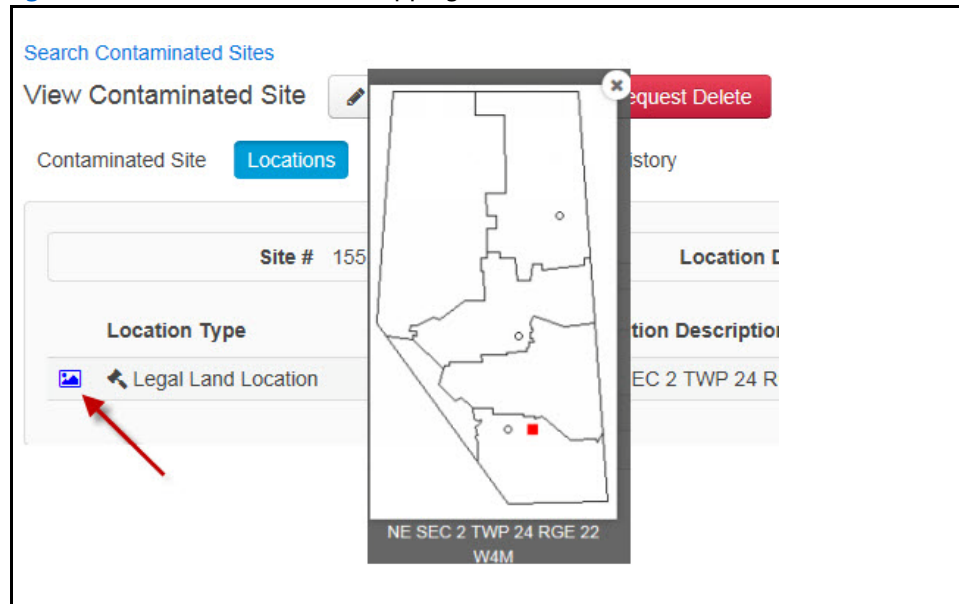
	Name	Comment	Legal Land Location	
<input type="text"/>	George Brown	<input type="text"/> site contamination	NW SEC 24 TWP 21 RGE 22 W4M	<input type="text"/>

Update
↻ Cancel

Add Locations Tab

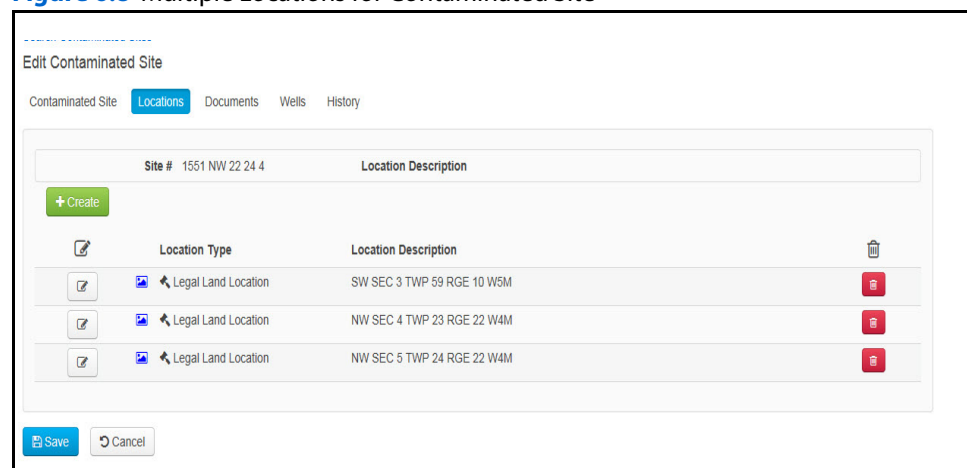
A Contaminated Site must have at least one Legal Land Location defined. Click on the *Location* tab to enter the LLL. More than one location should be entered if they pertain directly to the site and will assist in accurately locating the site.

Figure 6.7 Contaminated Site - Mapping



Alert! After entering the LLL on the *Location* tab and the data saved, a mapping icon appears. Clicking on the map icon will show a map of the contaminated sites location.

Figure 6.8 Multiple Locations for Contaminated Site



Add Documents

Various documents are uploaded by the consultant. Documents that are non finalized are only viewable by the consultants that have edit access to the contaminated site. Once a document is finalized, then others have view-only access to the document. To add documents to a Contaminated Site, click on the *Document* tab, click on the **Create** button.

Figure 6.9 Add Document.

The screenshot shows a web form titled "Create Contaminated Site Document". At the top right of the form is a close button (X). Below the title, there are two checkboxes: "Final" and "AT View Only". The "Type" field is a dropdown menu with the text "Select Document Type". The "Related Well" field is a dropdown menu with the text "Select Well". The "Description" field is a text input box. The "Document" field is a file upload area with a cloud and plus icon, and the text "Attach file by dropping it here or Select File". At the bottom right of the form are two buttons: "Update" (in blue) and "Cancel" (with a circular arrow icon).

Alert! When consultants have an environmental project created, the system will identify if there is a contaminated site that may impact their project. The consultant can then view the site and will only be able to view the finalized documents for the site.

Alert! Documents marked as AT View Only are viewed only by Transportation staff. Only a Transportation staff can remove the flag and make it viewable to others.

Alert! Documents marked as Final are set to read only and cannot be edited by anyone once the document is flagged as Final. Only Transportation staff (REC/EMS) can clear the Final Flag if this was done in error.

Add New Document Version

Figure 6.10 Upload a new Version of a Document

The screenshot shows the 'Edit Contaminated Site' interface. At the top, there is a green notification bar that says 'Update Successful'. Below this, there are tabs for 'Contaminated Site', 'Locations', 'Documents', 'Wells', and 'History'. The 'Documents' tab is active. The main content area shows a site with ID '1551 NW 22 24 4'. There are two buttons: '+ Create' and 'Hide Deleted'. Below this is a table of documents:

Document	Document Type	Description	Related Well	Added On	Added By	Deleted By	Final	
impact_clipart.jpg	Photo	Site Photo- new version upload...		04-Oct-2016	Roberta Baker		N	
Test Script SR 65195.docx	Remediation Report	AT to review		04-Oct-2016	Roberta Baker		N	

At the bottom of the interface, there are 'Save' and 'Cancel' buttons.

Alert! Click on the Show Deleted link to see older versions of a document. They will appear at the bottom of the list and be 'grayed' out.

Add Wells

Where monitoring is being performed on the site the ground monitoring wells can be added under the Wells tab. Related wells can also be identified and used in conjunction with the monitoring of the site. Once Wells are added, they can be attached to specific documents.

To create a well, locate the site, click on the **Edit** button of the contaminated site, click on the *Wells* tab and click on the **Create** button. When all mandatory fields are completed, click on the **Update** button and then the **Save** button.

Figure 6.11 Create a Well

The screenshot shows a web form titled "Create Contaminated Site Well". It contains the following fields and values:

- Well #**: 1
- Zone**: 12
- UTM X**: 410566
- UTM Y**: 5842278
- Location Description**: RRD 170, Heisler AB

At the bottom right, there are two buttons: "Update" (in blue) and "Cancel" (with a circular arrow icon).

Hint: A Universal Transverse Mercator (UTM) provides a location on the surface of the Earth similar to Latitude and Longitude. Use the lsdfinder.com website to locate the correct UTM coordinate.

Once a well has been added, it now can be associated to uploaded documents. Click on the *Documents* tab, click on the **Edit** button and click on the **Create** button.

Figure 6.12 Well related to Contaminate Site Documents

The screenshot shows a web form titled "Create Contaminated Site Document". It contains the following fields and values:

- Final**:
- AT View Only**:
- Type**: Other
- Related Well**: 2
- Description**: winter 2013 Environmental Management Plan Inspection and Ground water Monitoring and Sampling program completed March 13, 2013 by ABC Consulting Ltd.
- Document**: Attach file by dropping it here or Select File 13-03-2013_EMP Inspection_ABC Consulting.pdf

At the bottom right, there are two buttons: "Update" (in blue) and "Cancel" (with a circular arrow icon).

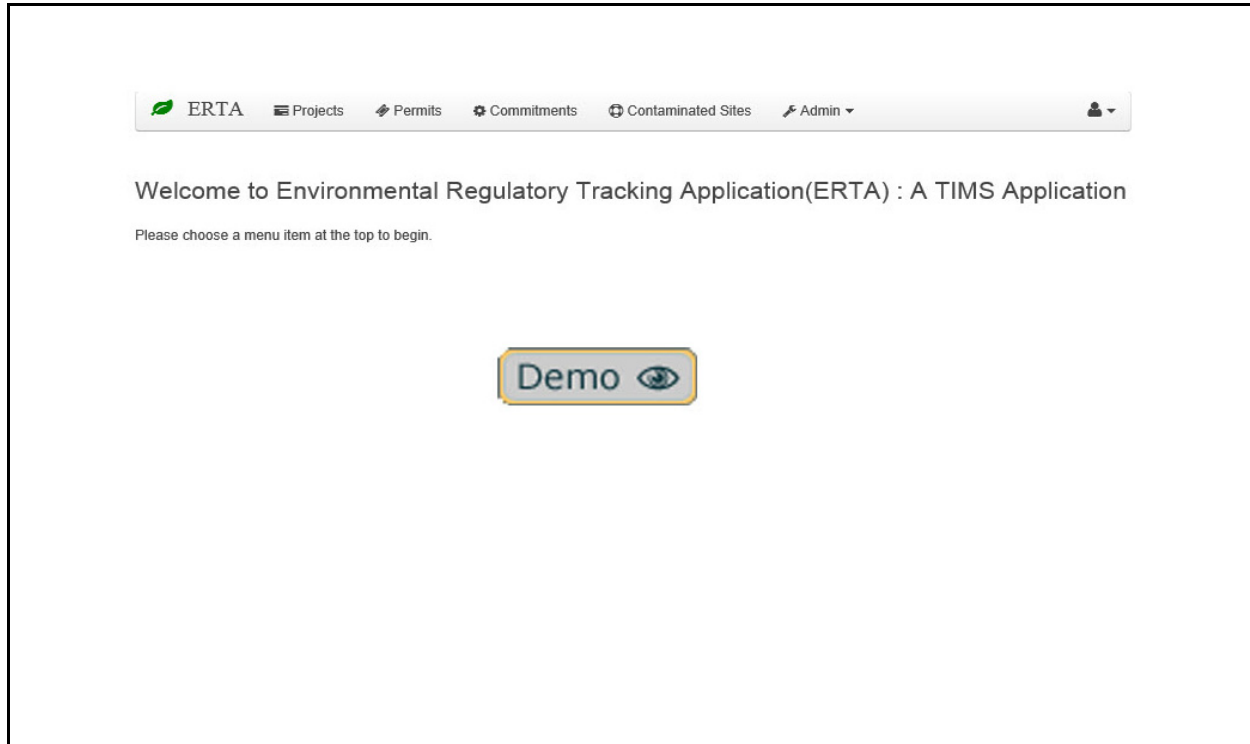
Alert! Selecting the Final option identifies this is a Final document. when selected, others will be able to see this content when viewing as a related site.

Alert! Documents marked as Finals are read only and cannot be changed/edited by anyone. However if this is a mistake, only Transportation staff (REC/EMS) can clear the marked flag.

Demo Create Contaminated Site

In this demo we will create a new contaminated site, add location, upload documents and identify associated wells.

Demo 6.1 Create a Contaminated Site



How To

1. Login to ERTA.
2. Click on the *Contaminated Sites* Module.
3. Click on the **Create** button.
4. Fill in the mandatory fields (* asterisk), one consultant and agreement number.
5. Click the **Save** button to ensure all the required fields are filled in.
6. Click on the *Location Tab* and create at least one location.
7. Click on the **Update** button.
8. Click on the *Documents Tab*, and add a Document.
9. Click on the **Update** button.
10. Click the **Save** button.

Override Default Project Distance

A Contaminated Site can be edited to upload a new version of a document, to defer the remediation of a site to a future Capital Project and override the future project distance default.

Search for the site and then click on the **Edit** button. Select **'Remediation Deferred to next Capital Project'** and then enter the **Override Project Distance** value.

Figure 6.13 Contaminated Site - View default Override distance



Alert! The default override distance can be changed by the ERTA Administrator, confirm the default value by reviewing the field tip.