# Welcome!

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

- The Site Administrator(s) for a company are responsible for creating and maintaining Client User Accounts. The Site Administrator(s) assigns levels of access to ETS based on the role an individual has within the company.
- Individual accounts (called Client User Account) are subsets of the Site Administrator Account(s). Each Client User Account is given access to Form Types (Type of Business you will be submitting) and assigned a Role that defines the required functionality.
- Once the Client User Account is created, the individual can logon to the secure ETS web site using this new Client User Account login Id and password.

  - ➢ This new Client User Account must be assigned a role which defines the functionality that this account can access while in ETS. This is designed to allow organizations to delegate specific Business functionality to certain accounts for different forms in order to maximize the visibility of secure information to those authorized to view that information.

# Revision Page

**Revisions Table**

| Date | Revisions Type | Page Number |
|---|---|---|
| January 14, 2016 | Initial Creation | All |
| August 2, 2019 | Update | All |
| June 28, 2023 | Update Content | Page 11 & 32 |

# Introduction

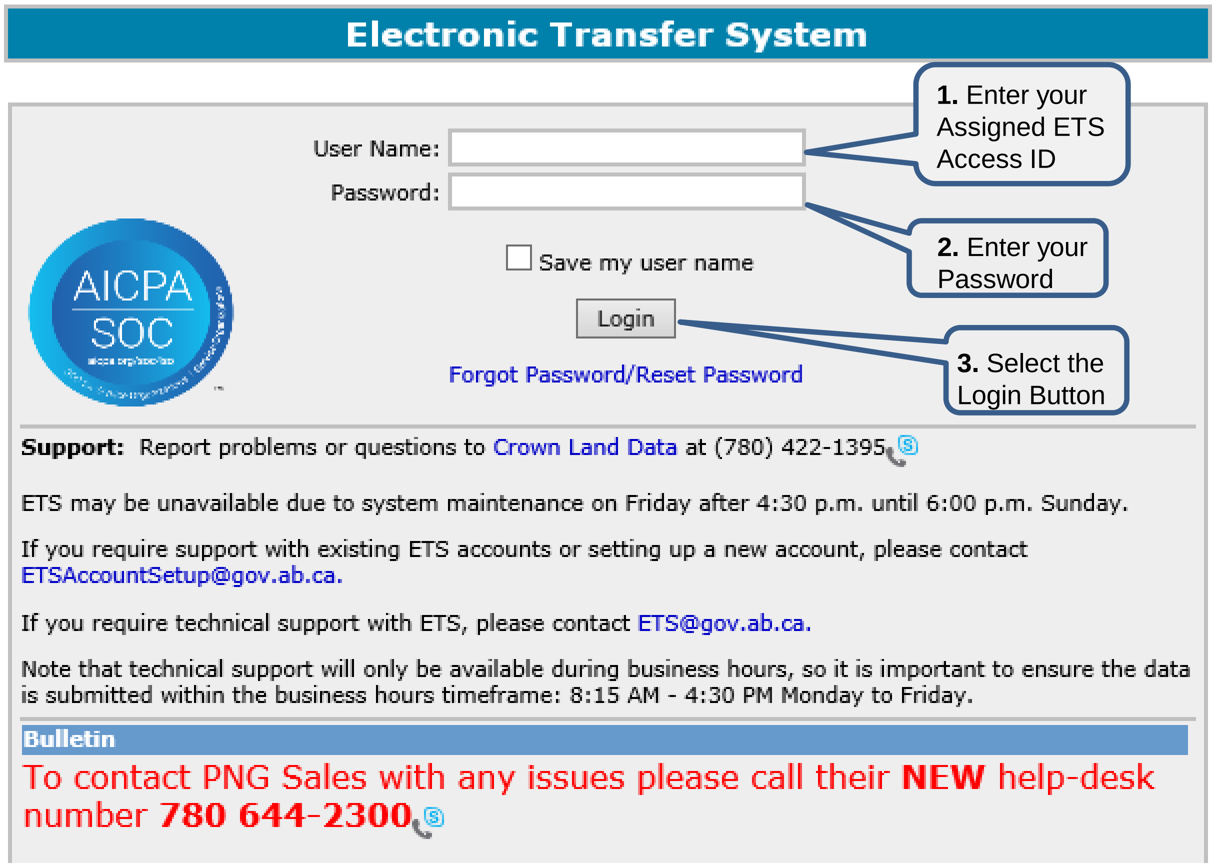
**In this module, you will learn:**

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

**Course Pre-requisites:**

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

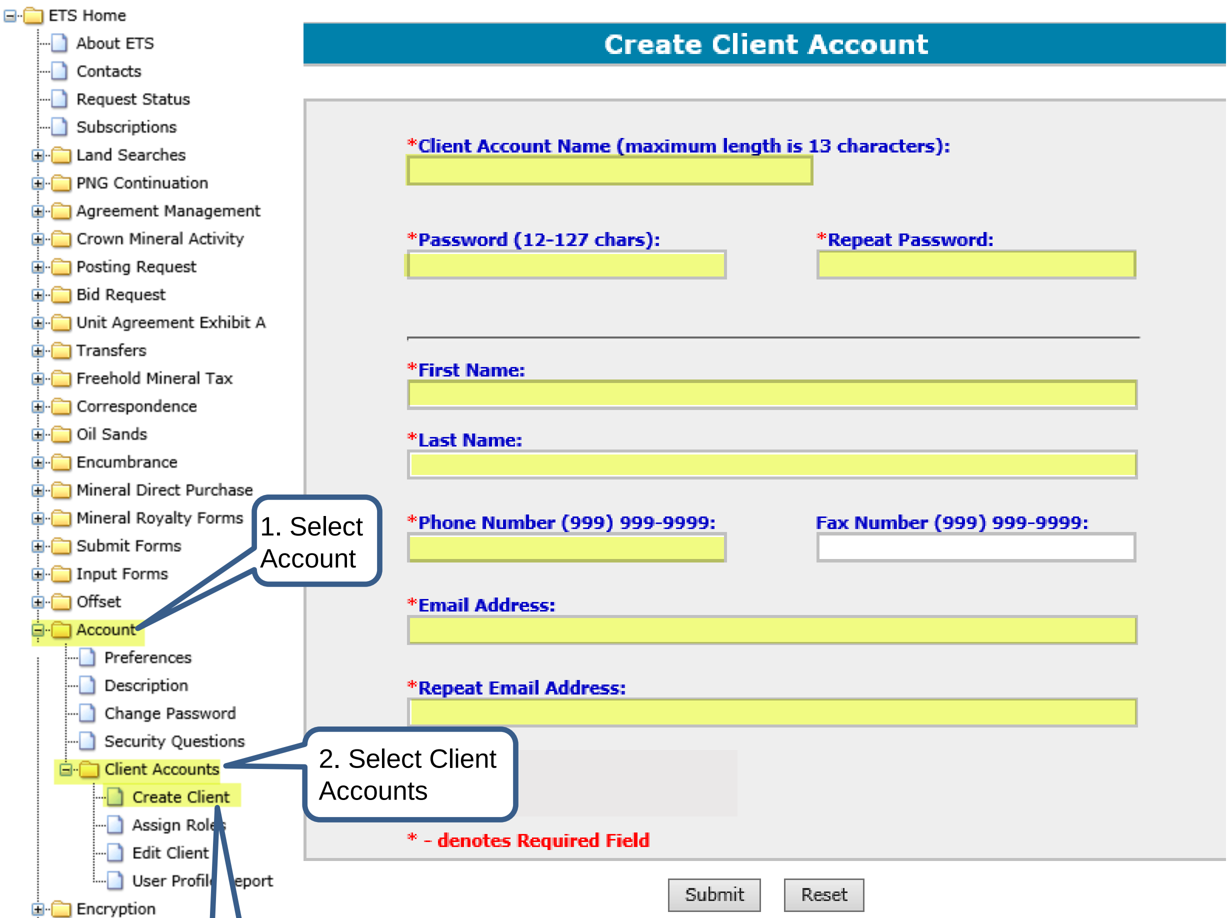
# ETS Login Steps

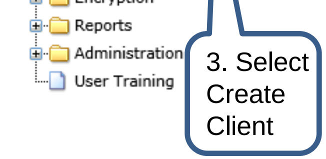


# ETS Home Page

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

# Create Client Account




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

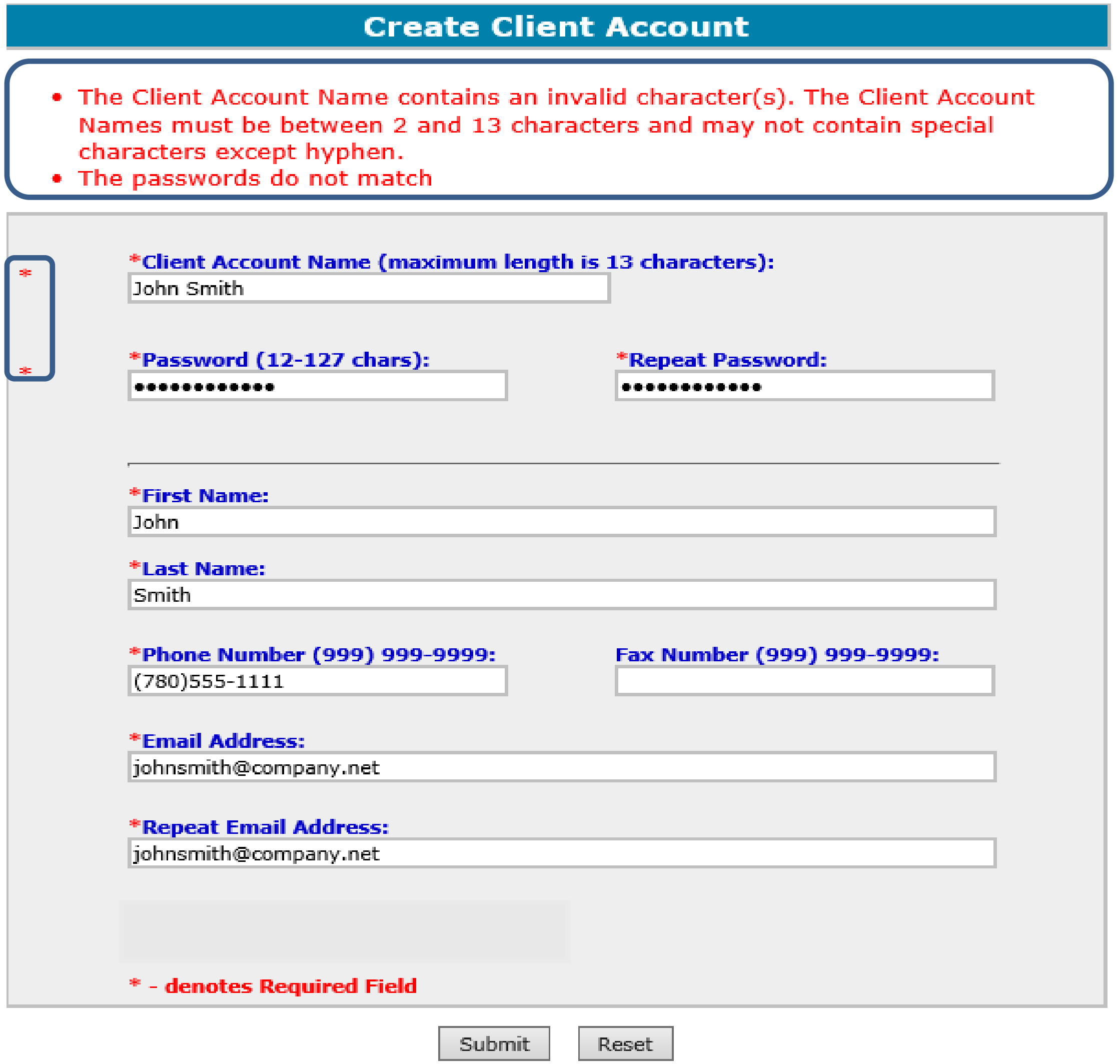
- Unique Client Account Name (maximum of 13 characters)
- Password – See **NOTE** below.
- First Name (maximum of 20 characters)
- Last Name (maximum of 40 characters)
- Phone Number (maximum of 14 characters)
- Fax Number, optional (maximum of 14 characters)
- Email Address (maximum of 60 characters)

**Submit**: This button will validate the information entered.
**Reset**: This button will clear all the fields on the form.

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

Continued onto next page

# Create Client Account - Continued




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

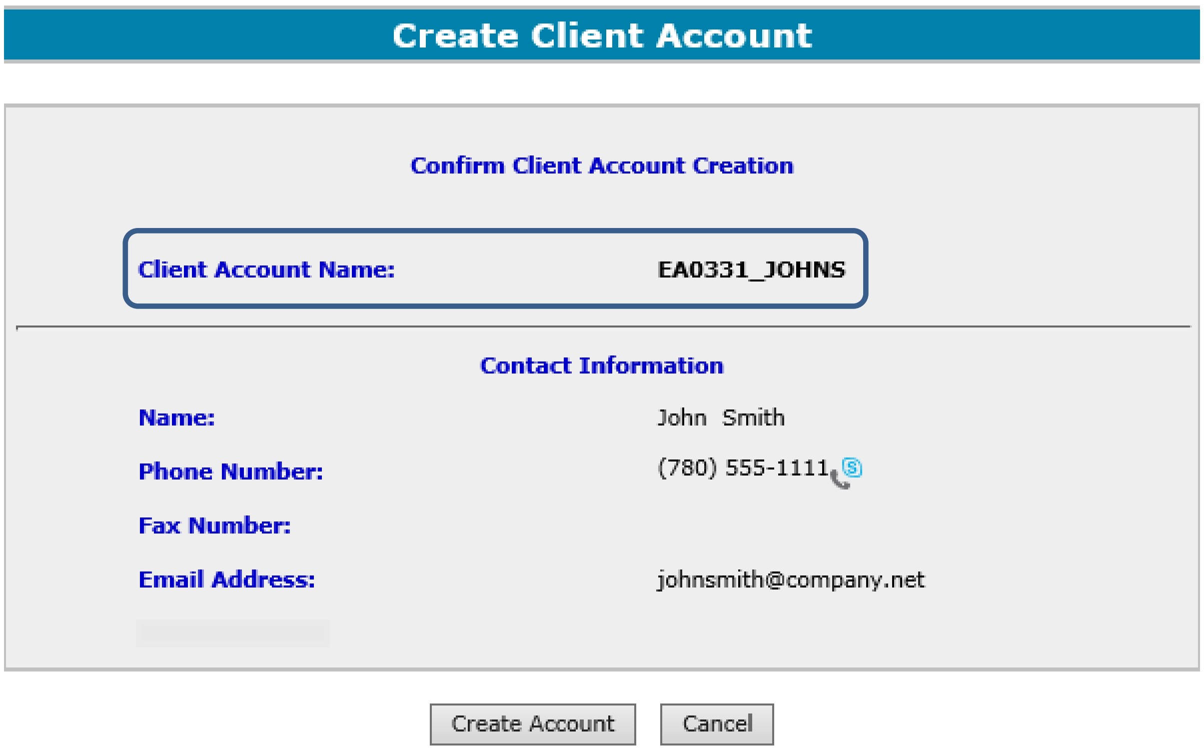
If any error(s) are detected during the validation, a message will appear at the top of the page.

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

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

Continued onto next page

# Create Client Account - Continued



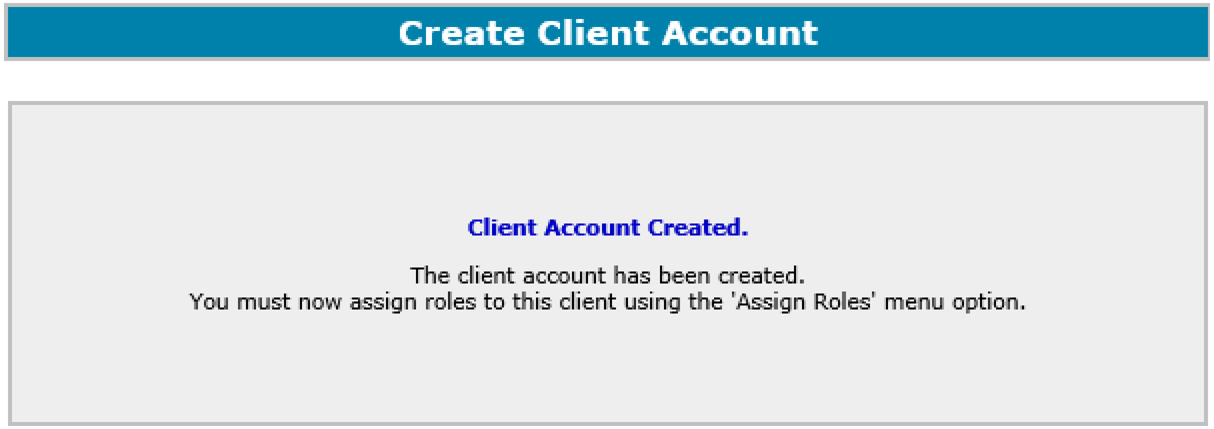

After selecting **Submit** on the previous page, ETS will validate the information again and the **Create Client Account** will populate if no errors occur.

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

**NOTE:** The **Client Account Name** entered on the input screen has now been created with the prefix of the Company's ETS Account Number. Example: ETS Account Number **EA0331** and Client Account Name entered into the **Create Client Account** Input Screen, becomes the new **Client Account Name:** EA0331_JOHNS

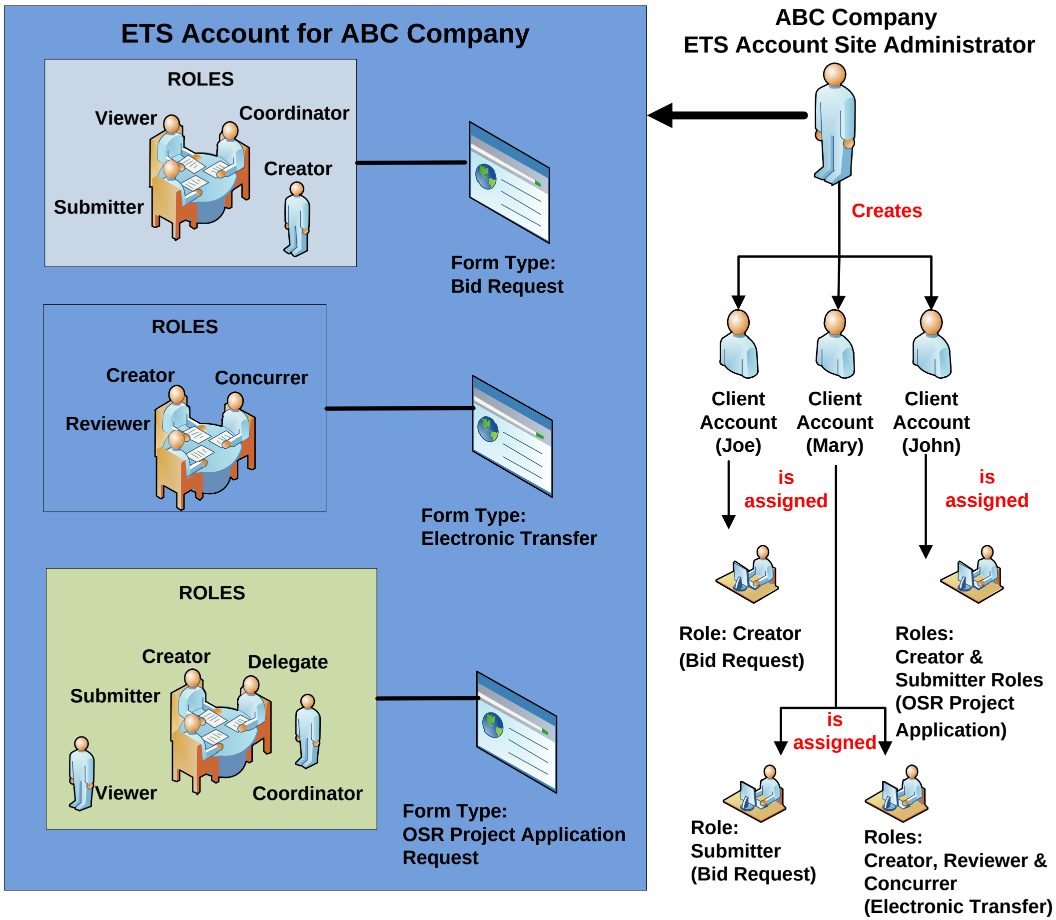
Continued onto next page

# Create Client Account - Continued




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

## Client Roles Overview




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

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

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

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

Continued onto next page

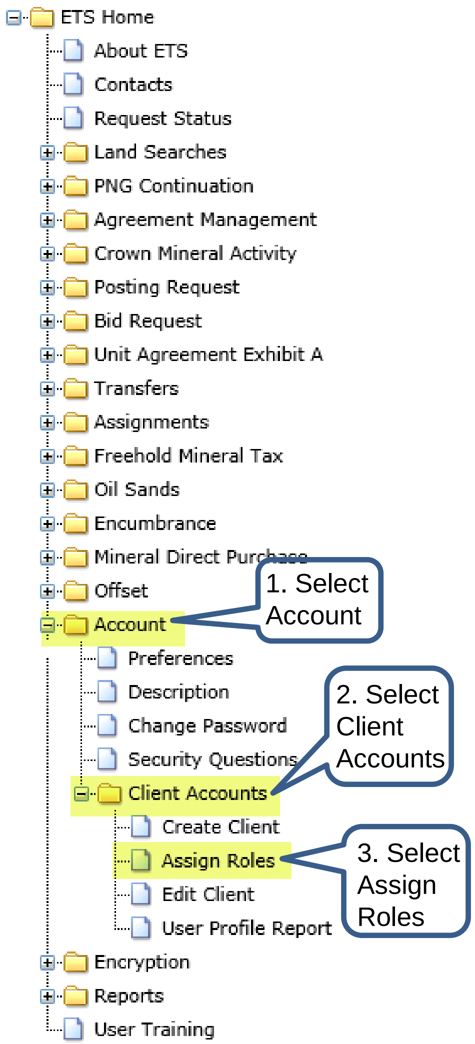
# Client Roles Overview - Continued

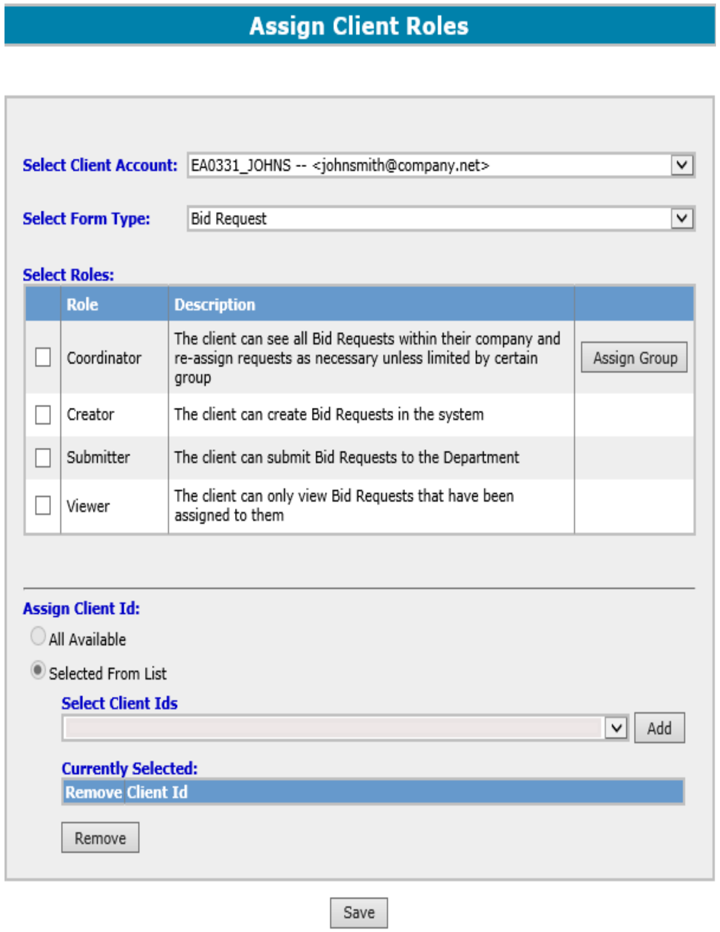
A Client ID represents the Department of Energy ID that will be used when submitting requests. By default, the **Client Account** will have access to all Client IDs that have been associated with the Site Administrator Account. However, individual Client IDs can be added to the **Client Account**.

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

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

# Assign Client Roles - Overview



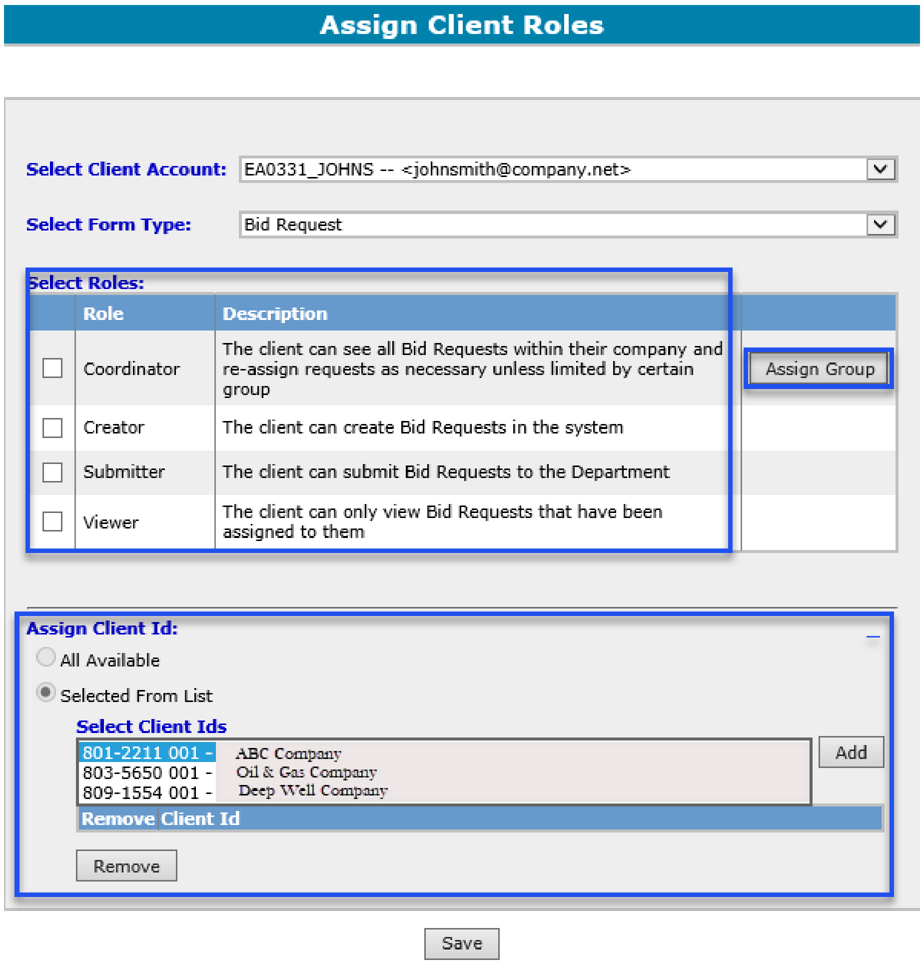




The following functions are available on the **Assign Client Roles** screen:

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

Continued onto next page

# Assign Client Roles Overview – Continued

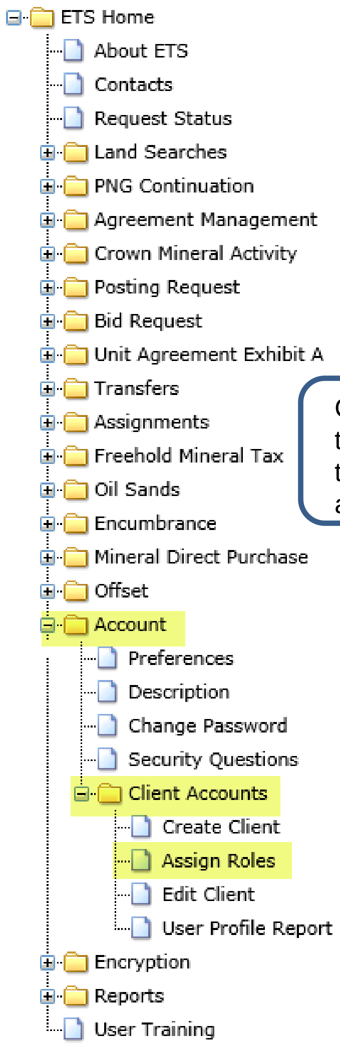


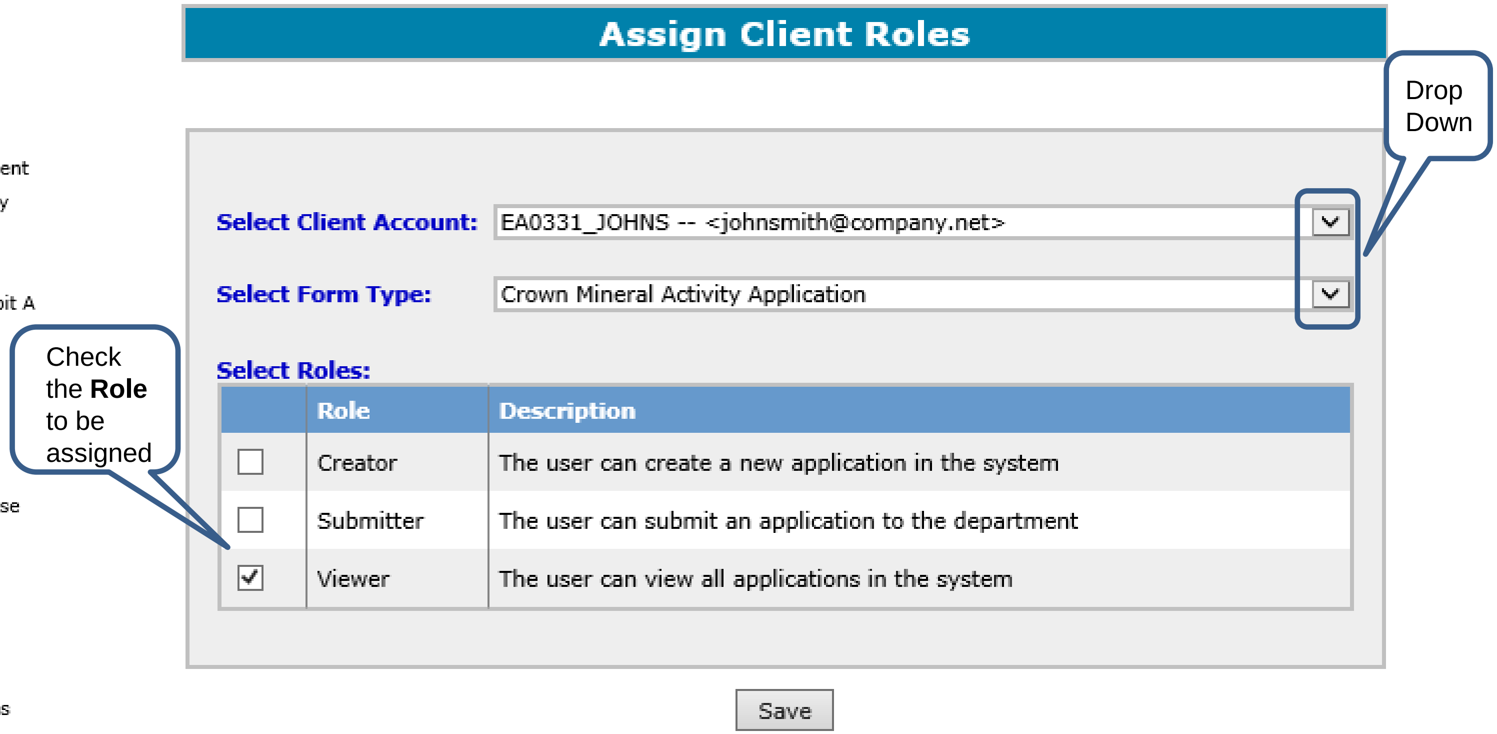

- **Select Roles** - A **Client Account** may have multiple **Roles** for a specific **Form Type**. Clicking on the box(es) next to the **Role(s)** will assign the **Role** to the **Client Account**.

- **Assign Group** - **Assign Group** function becomes available to certain **Form Types** such as Bidding and OASIS. ***Only*** a Site Administrator role(s) is allowed to perform the **Assign Group** function.

- **Assign/Select Client ID** - By default, the **Client Account** will have access to the All Available option, which grants access to all Client IDs that have been associated with the Site Administrator Account(s). Certain **Form Types** (i.e., Bidding Request, Posting Request, etc.) require a Client ID to be assigned to a **Client Account**. To add a client, select a Client ID, then click on the **"Add"** button.

# Assign Client Roles and Form Types

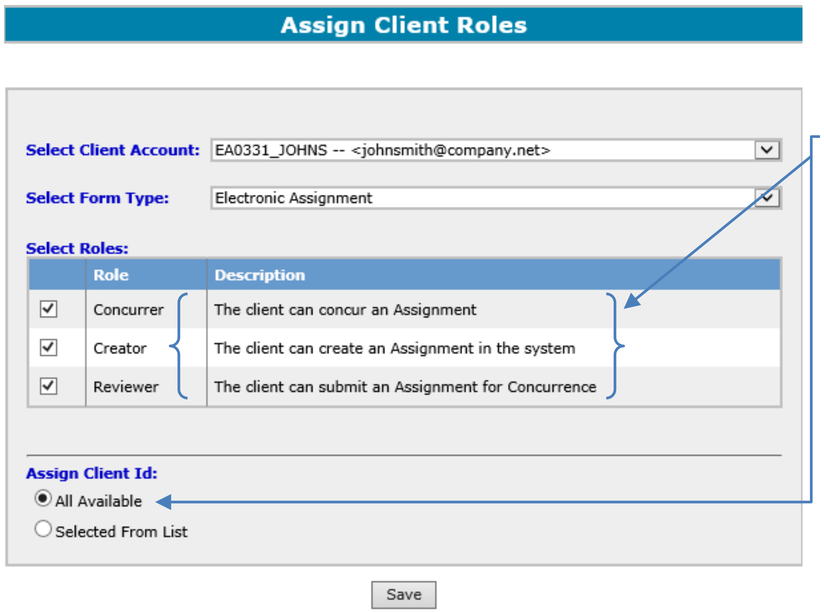


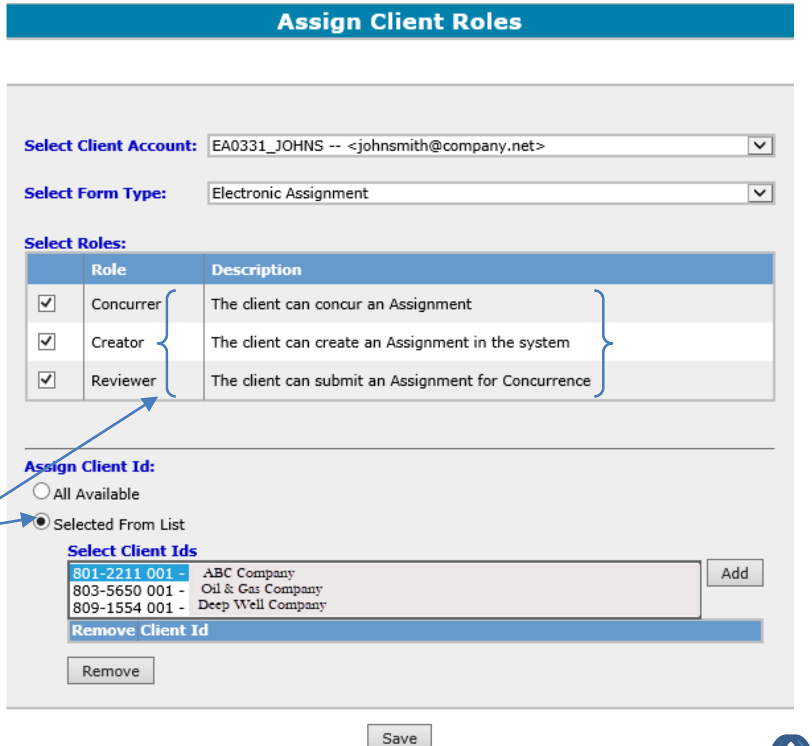

After the **Client Account** is create you will need to **Assign Client Roles and Form Type(s)** to the **Client Account**. Select the **Client Account** by using the drop down arrow and then select the **Form Type** using the other drop down arrow. Once the **Form Type** has been selected, the **Select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

Continued onto next page

# Assign Client Roles and Form Types - Continued



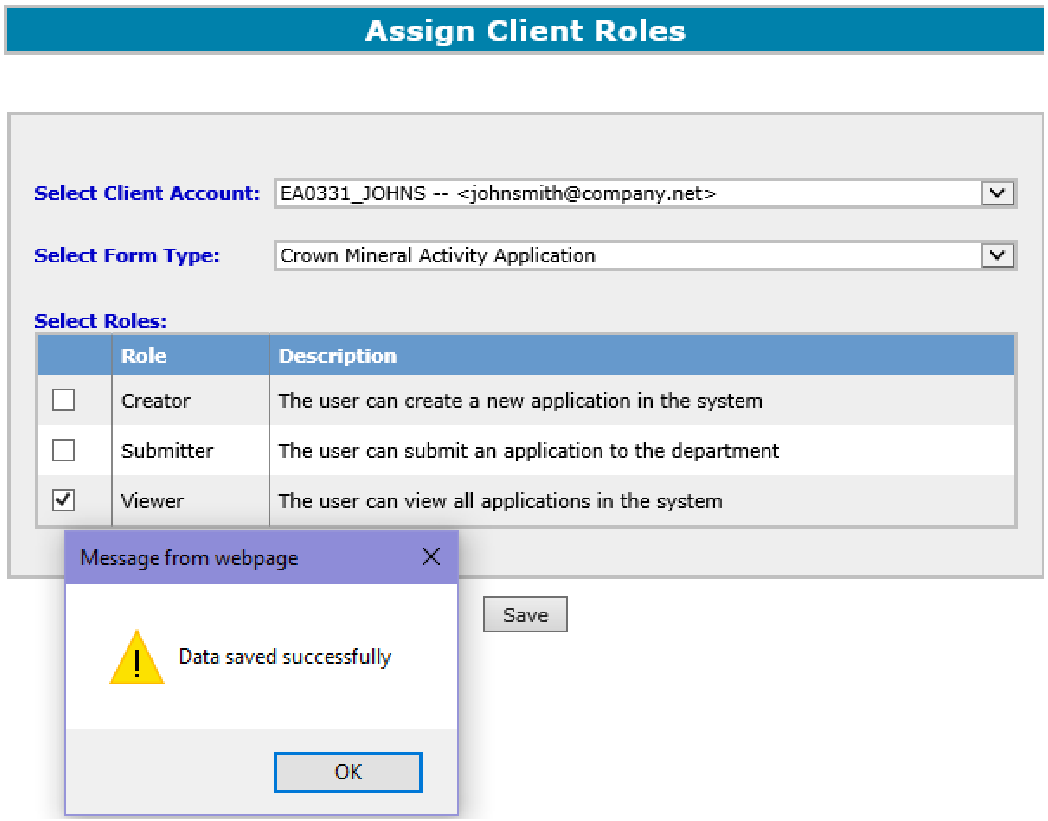

This example is showing *Multiple* **Roles** on a **Form Type** and assigning **All Available** Client IDs to the **Form Type,** then selecting **Save.**




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

Continued onto next page

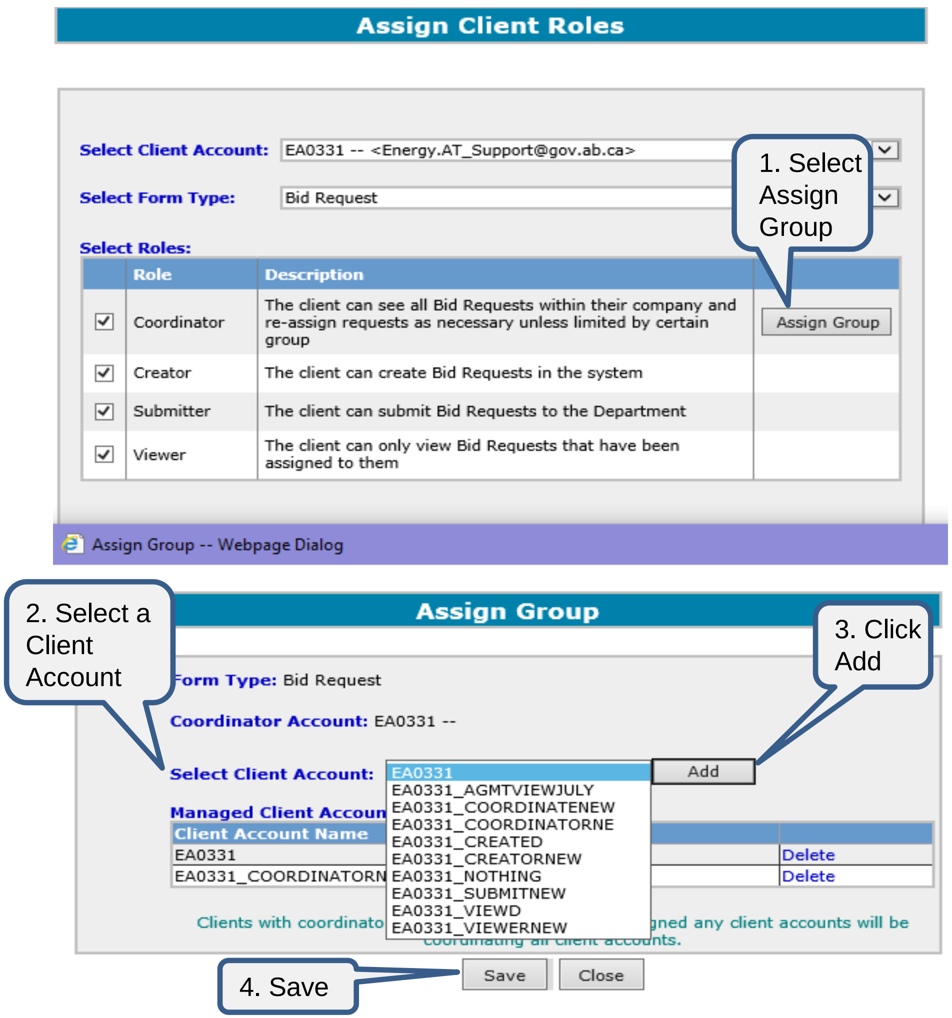
# Assign Client Roles and Form Types - Continued




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

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

# Assign Client Accounts to a Coordinator Group




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

1. Select the **"Assign Group"** button

2. Select a **Client Account** from the Select **Client Account** dropdown list.

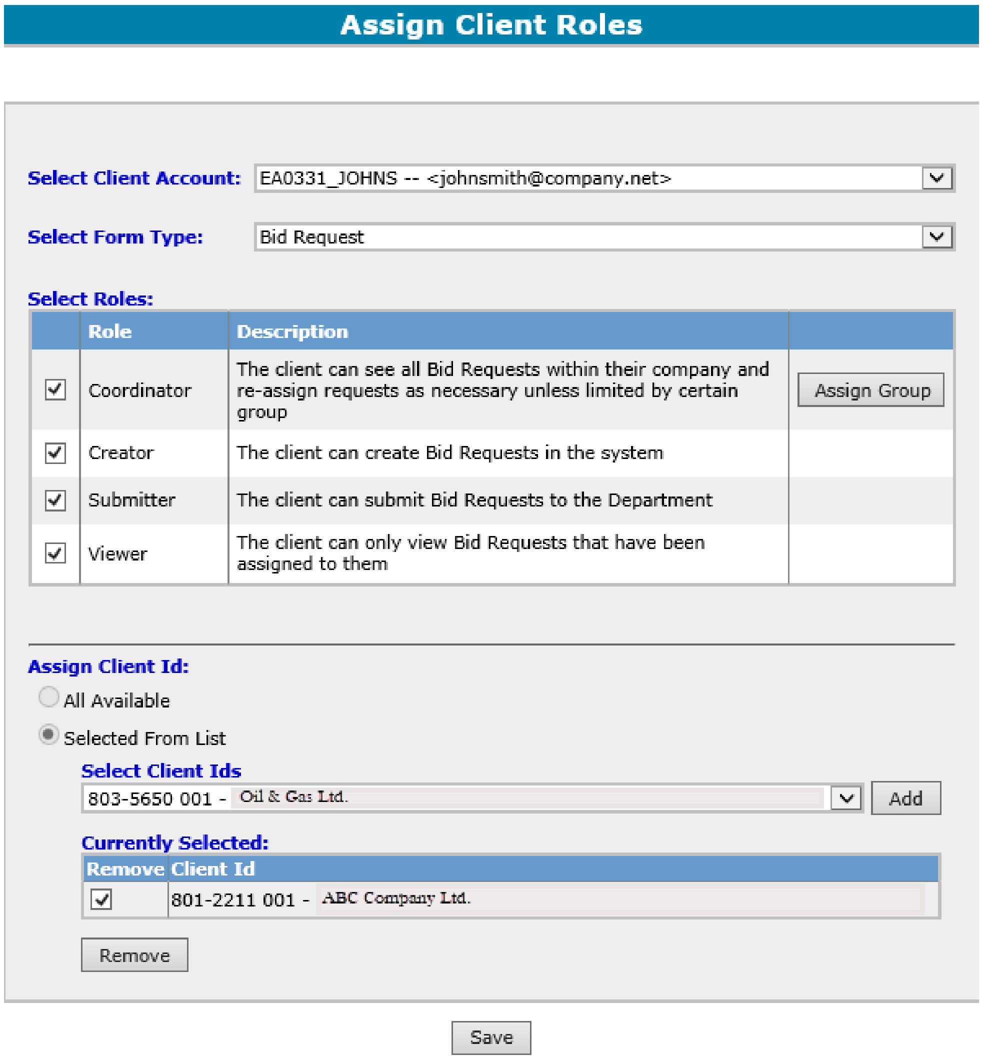
3. Click the **Add** button to update the Managed **Client Accounts** List.

4. When done entering the **Client Accounts** to be managed by the Coordinator, click the **Save** button.

5. If you do not want to continue click the **Close** button to exit the screen.

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

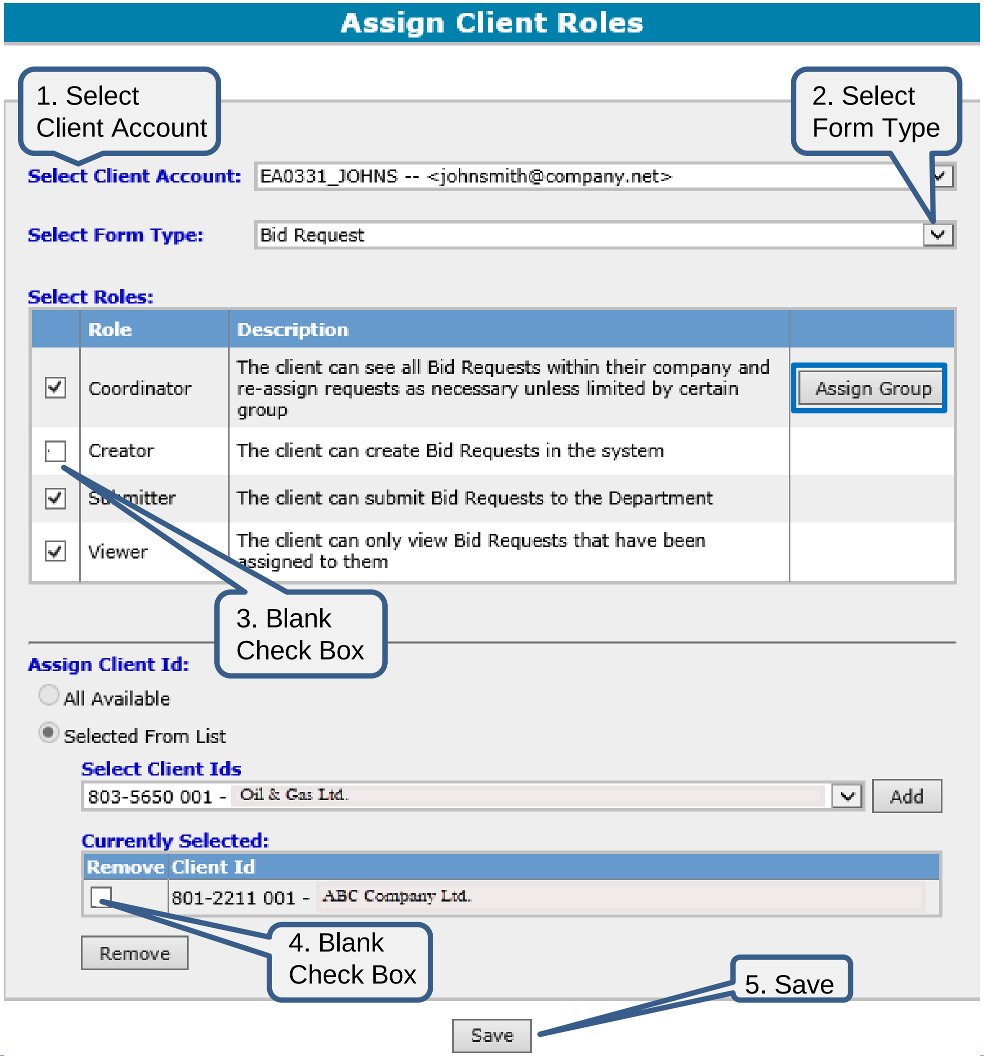
# Remove Client Role from an Assign Group




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

Continued onto next page

# Remove Client Role – Continue

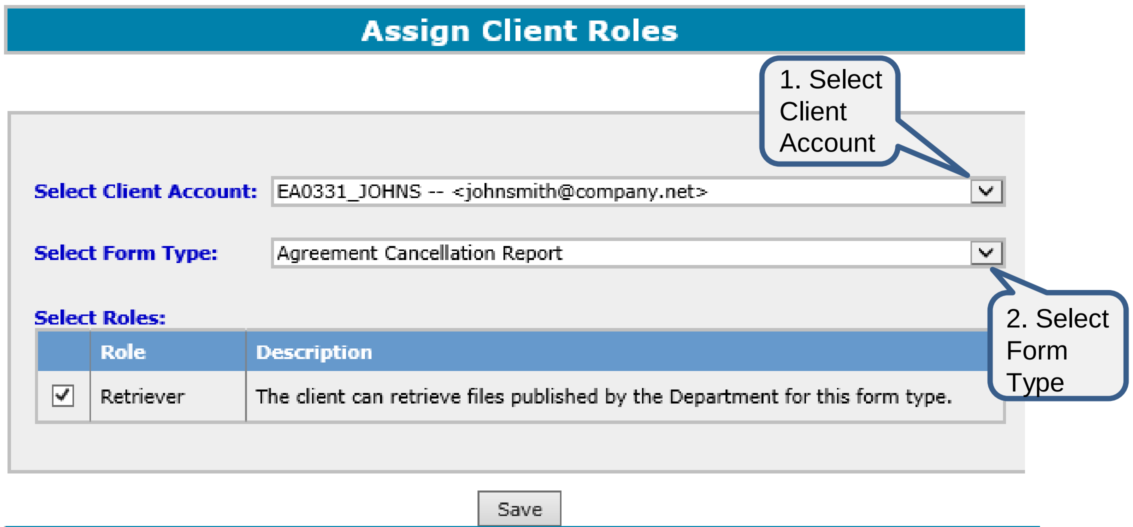


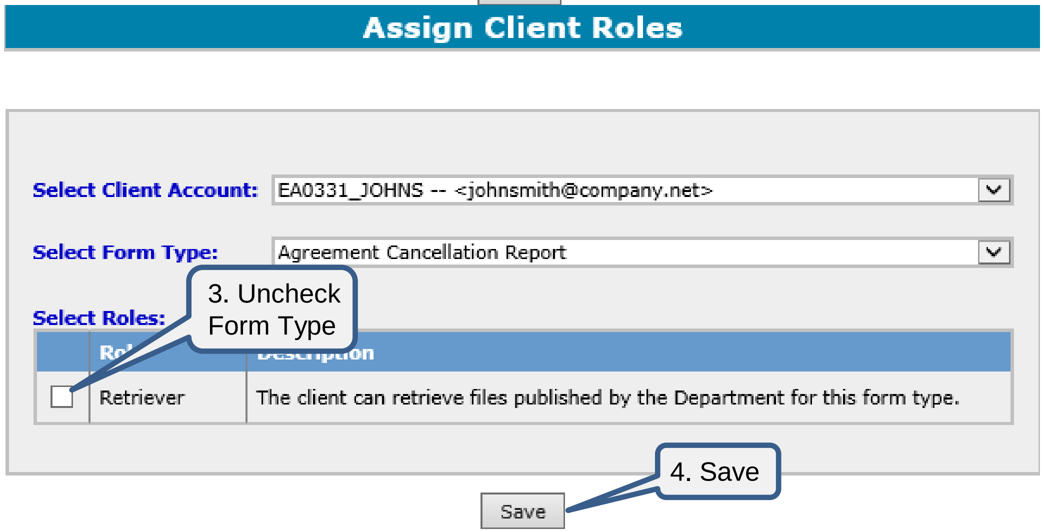

To **Remove** a **Role(s)** from a **Client Account**, the following are the guidelines:

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

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

# Remove a Form Type from Client Account

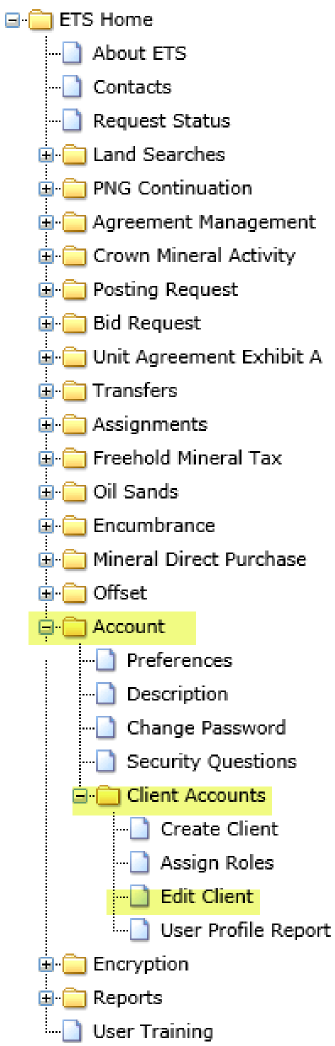


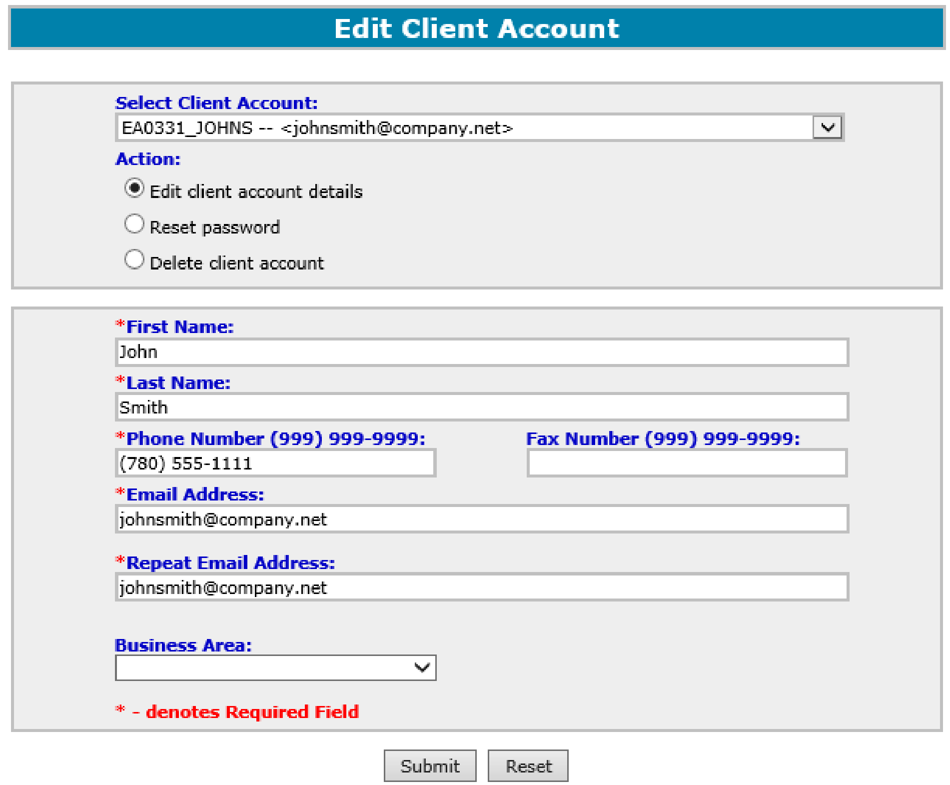




To **Remove** a **Form Type** from a **Client Account**, the following are the guidelines:

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

# Edit Client Account



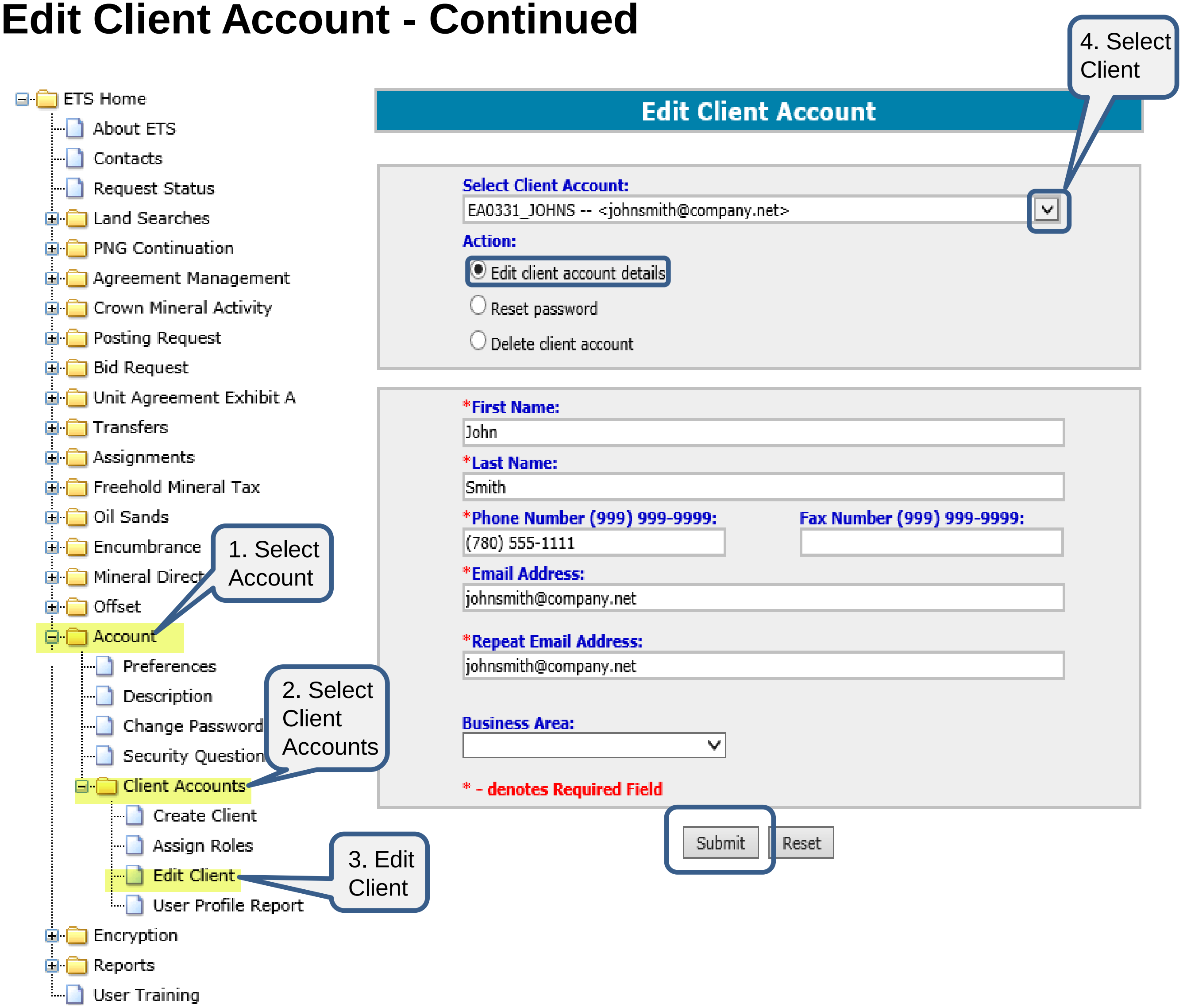

**Client Accounts** may be edited by the Site Administrator(s).

The Administrator(s) may:

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

Continued onto next page

# Edit Client Account - Continued




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

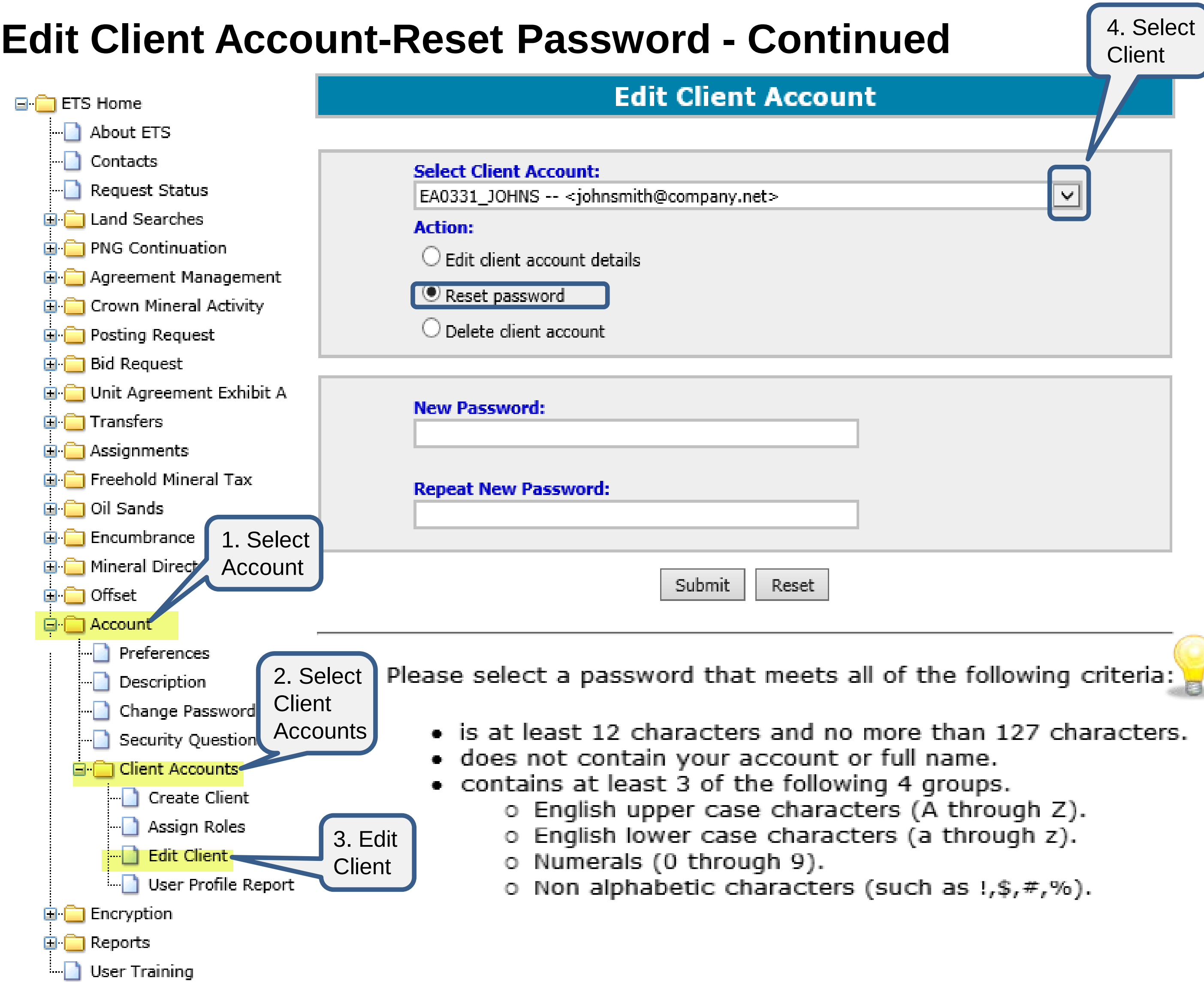
Edit:

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

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

Continued onto next page

# Edit Client Account-Reset Password - Continued



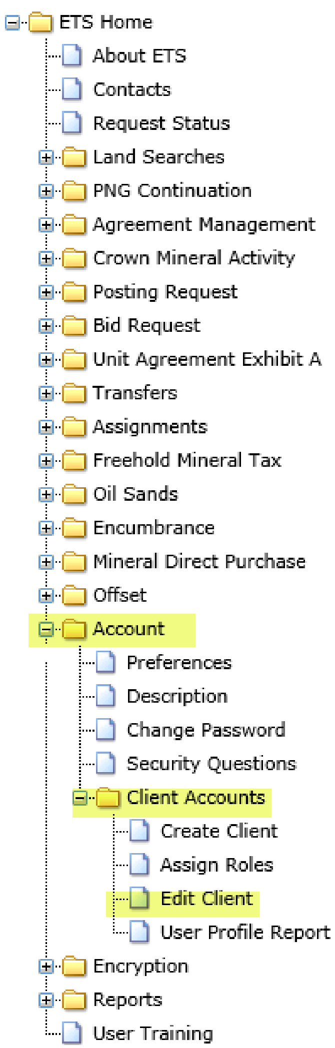

To reset a password on a **Client Account**, select the "**Reset Password**" button on the **Edit Client Account** screen. Using the drop down arrow select the **Client Account** for which you want to Reset the Password.

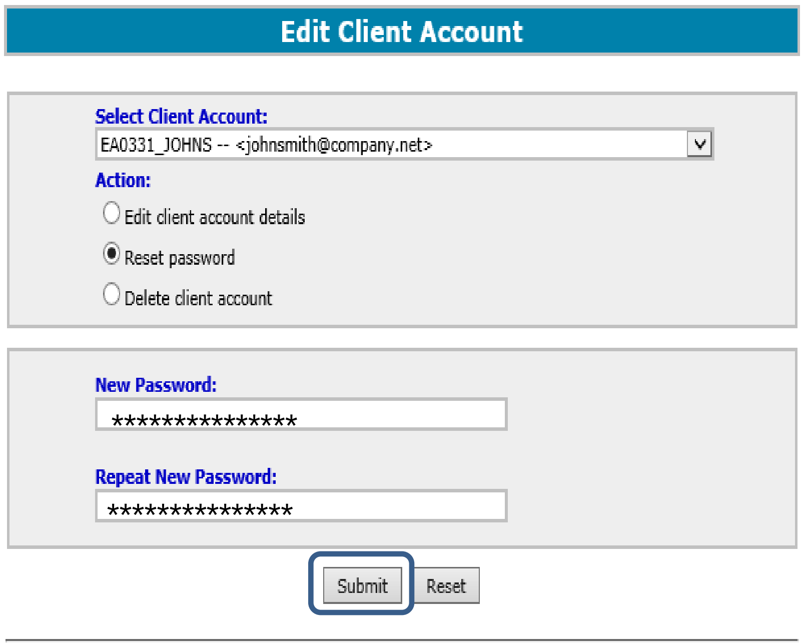
On this screen the user will be required to enter the new password twice. The password needs to conform to all the password complexity and history requirements already implemented in ETS, then select **Submit**.

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

Continued onto next page

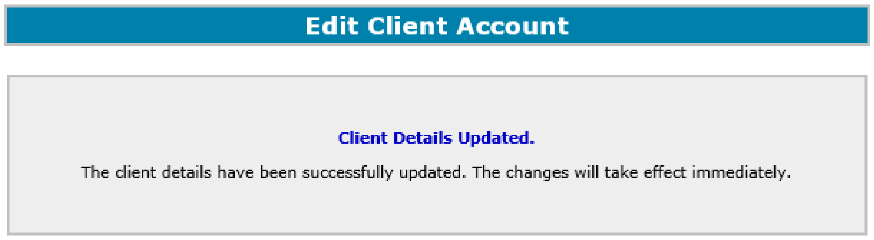
# Edit Client Account-Reset Password - Continued



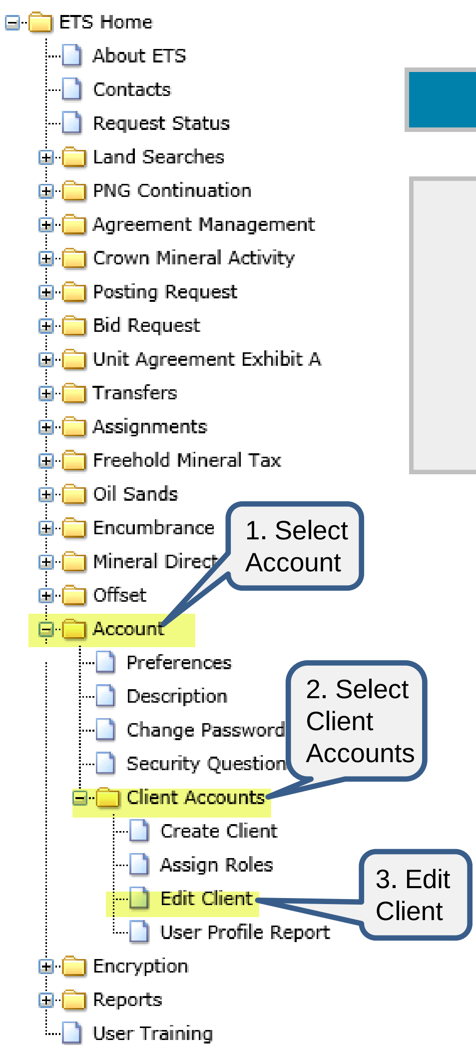

Once the password is submitted and changed successfully, it will be active for 360 days and then a reminder notification will be sent to the user.

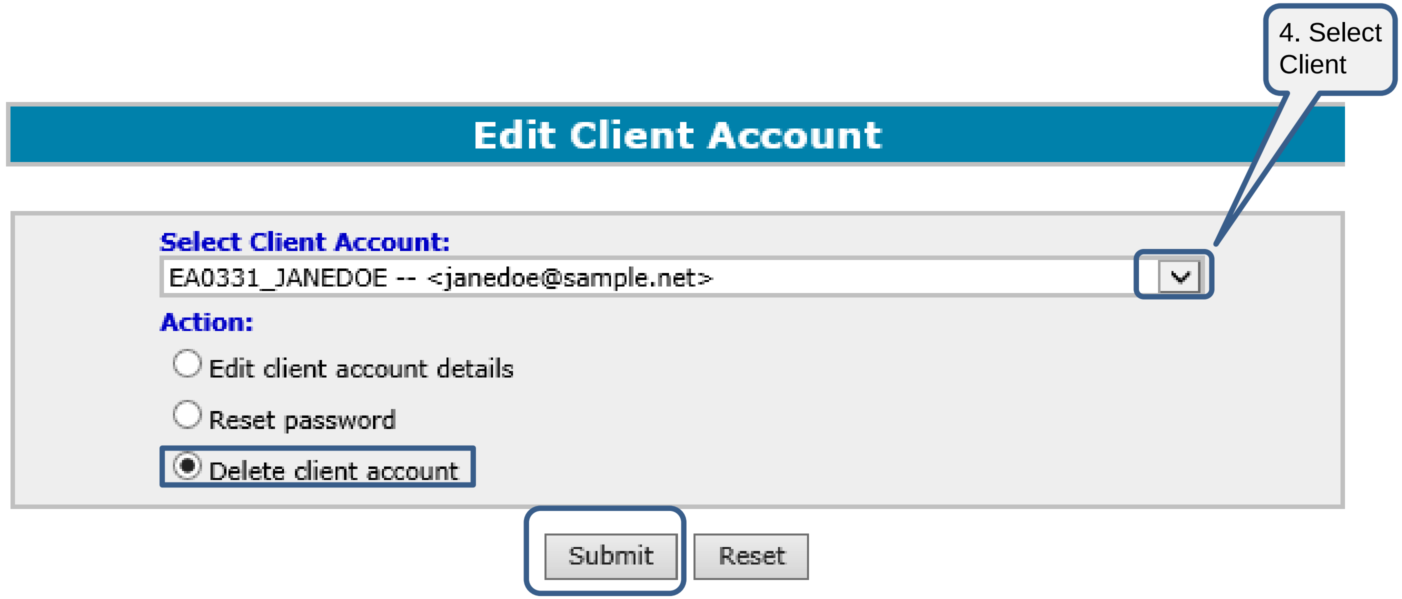
**NOTE:** ETS will not allow the reuse of the last ten passwords on your account, nor the use of more than two sequential characters from your User Account/User Name.




Continued onto next page

# Edit Client-Delete Client Account- Continued

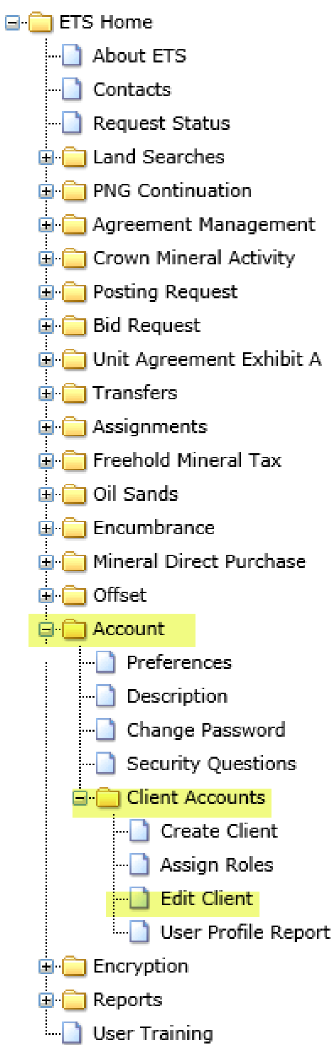


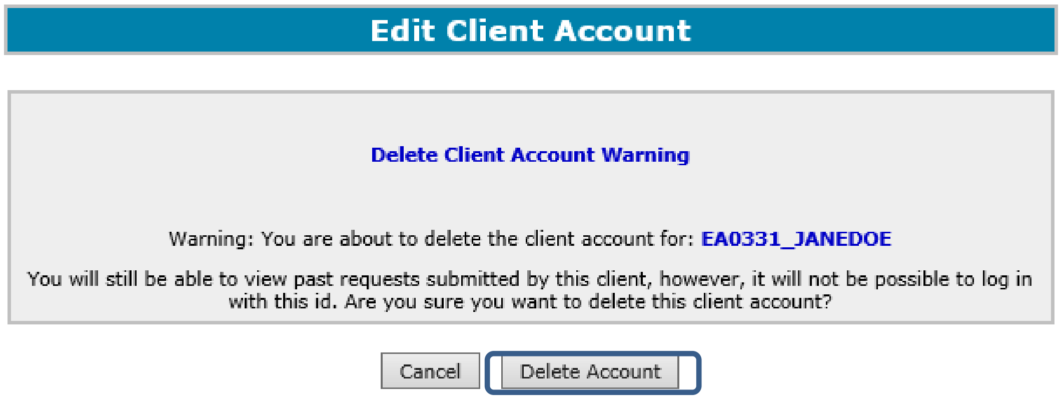




To remove a **Client Account,** select the client from the dropdown box and then select **Delete Client Account** from the **Action** items. Once you have completed these actions select the **Submit** button to delete the **Client Account**.

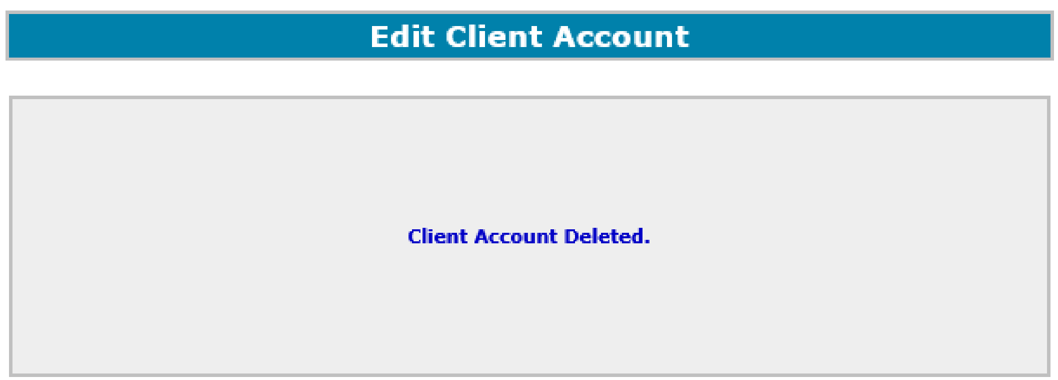
Continued onto next page

# Edit Client-Delete Client Account- Continued




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




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

# Account Description

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

1. Select Account

2. Select Description

## Account Description

Role Assignments

Filter by:

○ Client Account Name   EA0331 -- <Energy.AT_Support@gov.ab.ca>

○ Form Type   Agreement Cancellation Report

Submit   Reset

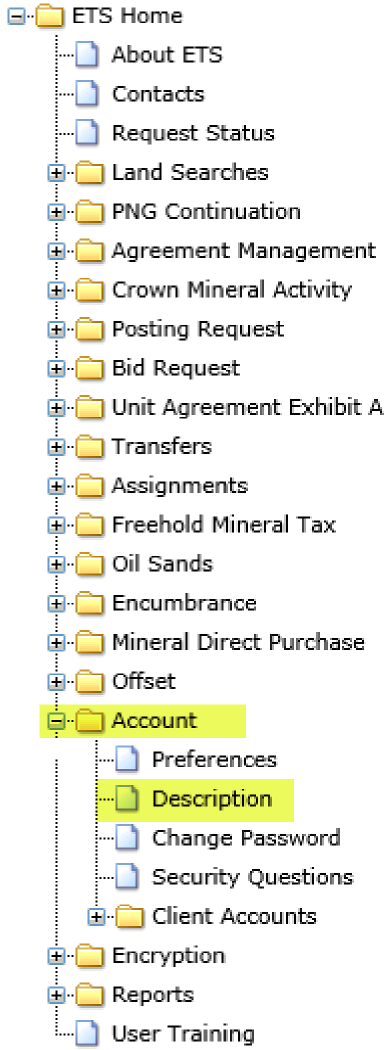
| Client Account Name | Form Type | Role |
|---|---|---|
| EA0331_COORDINATORNE | Oil sands Supplemental Reporting | Submitter |
| EA0331_COORDINATORNE | Oil sands Supplemental Reporting | Viewer |
| EA0331_COORDINATORNE | Statement of account for Oilsands activities | Retriever |
| EA0331_CREATED |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

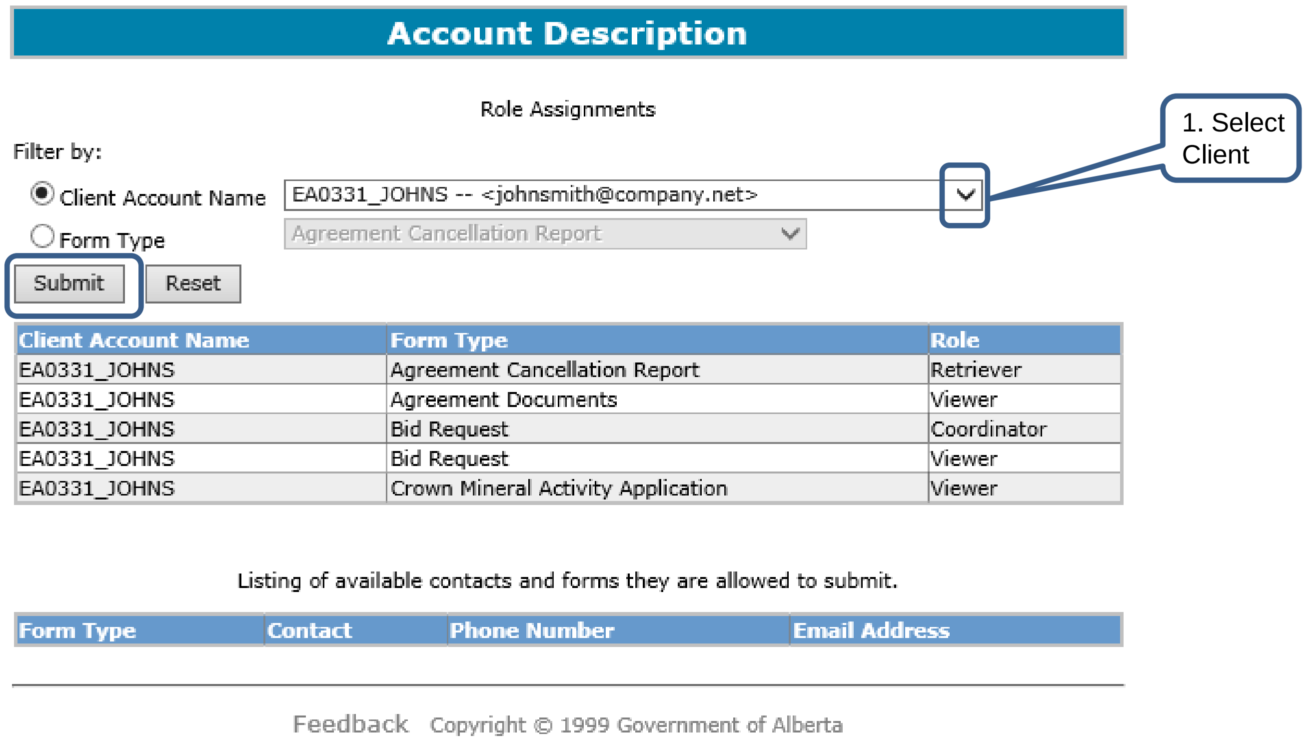
The **Description** option from the **Account Menu** allows for the details of the **Client Accounts** to be displayed. It shows the **Role Assignments** of each **Client Account** and the listing of available contacts for each **Form Type**.

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

Continued onto next page

# Account Description




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

Continued onto next page

# Account Description

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

## Account Description

1. Select Form Type

Role Assignments

Filter by:

Client Account Name: EA0331 -- <Energy.AT_Support@gov.ab.ca>

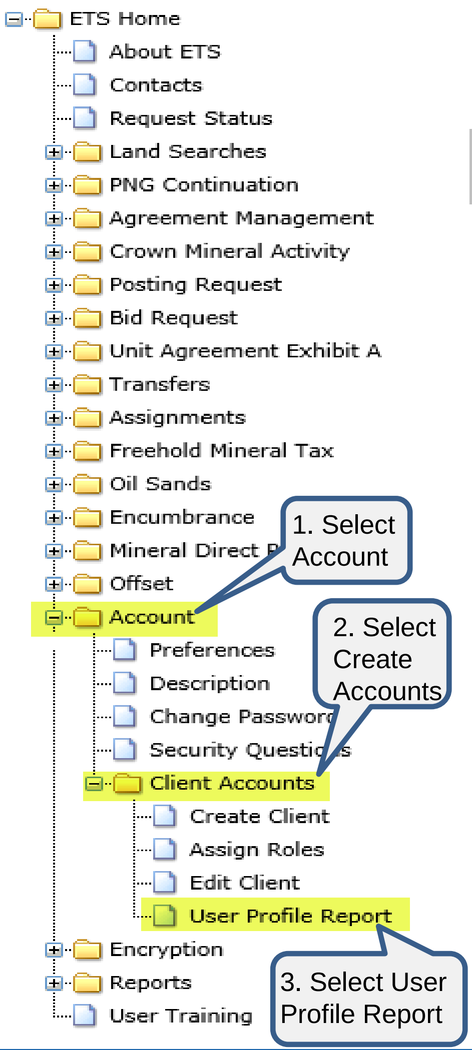
Form Type: Bid Request

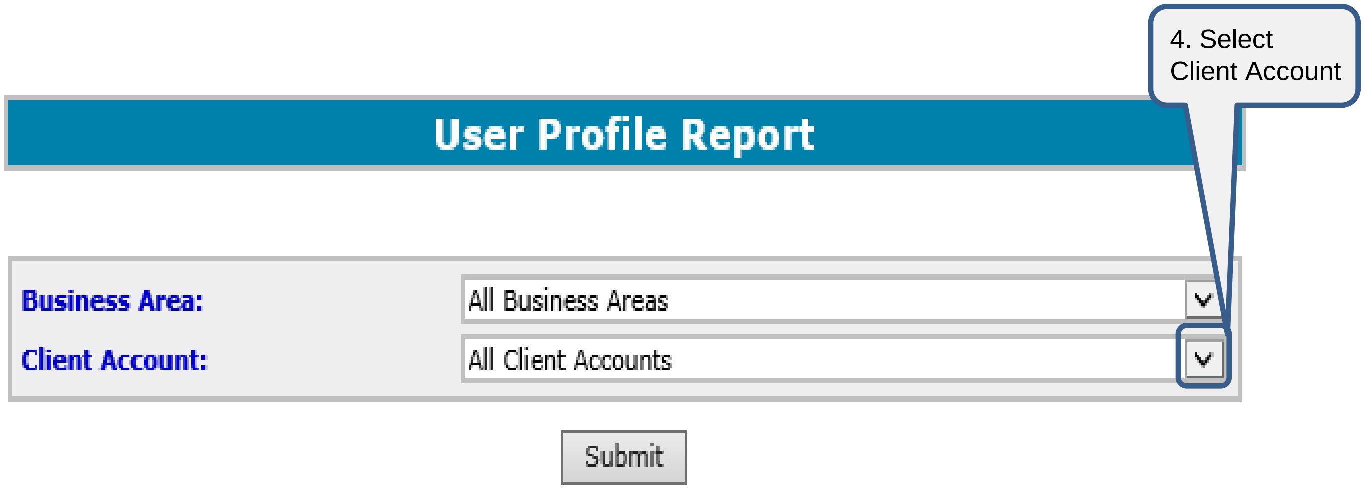
Submit | Reset

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

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

# User Profile Report




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

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

Continued onto next page

# User Profile Report - Continued

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

**ELECTRONIC TRANSFER SYSTEM** July 31, 2019
**CLIENT PROFILE REPORT** 1:37:51 PM
**Business Area - All Business Areas**

**Contact Information**

**CLIENT ID:** **EA0331**

| | | | |
|---|---|---|---|
| First Name: | AT | Surname: | AT |
| Phone Number: | 780 555 1212 | Fax Number: | |
| Business Name: | ABC Company Ltd. | Email Address: | abccompany@net.com |
| Business Area: | | Last Login: | 2019-06-19 3:52:23 PM |

**Client Information**

| BAID | Client ID | Address ID | Business Name | Status |
|---|---|---|---|---|
| 0L69 | 0000253 | 001 | ABC Company Ltd. | ACTIVE |
| 0HE9 | 8012211 | 001 | 123 Company Corporation | ACTIVE |
| 0PJ6 | 8035294 | 001 | AAA Oil and Gas | ACTIVE |
| 0C5H | 8035650 | 001 | Energy Oil and Gas | ACTIVE |
| 0WC5 | 8043660 | 001 | High Stakes Corporation | CANCELLED |
| A327 | 8091554 | 001 | Deep Drilling Corp. | ACTIVE |

**User Roles and Permissions**

| Form | Form Type | Form Role |
|---|---|---|
| Agreement Management-Authorization | AGRAUTH | Concurrer |
| Agreement Management-Authorization | AGRAUTH | Submitter |
| Agreement Management-Authorization | AGRAUTH | Viewer |

**Client ID for Agreement Management-Authorization**

| BAID | Client ID | Address ID | Business Name |
|---|---|---|---|
| All | | | |

| | | |
|---|---|---|
| Agreement Documents | AGREEMENT | Viewer |

**Client ID for Agreement Documents**

| BAID | Client ID | Address ID | Business Name |
|---|---|---|---|
| All | | | |

| | | |
|---|---|---|
| Electronic Assignment | ASSIGNMENT | Concurrer |
| Electronic Assignment | ASSIGNMENT | Creator |
| Electronic Assignment | ASSIGNMENT | Reviewer |

**Client ID for Electronic Assignment**

| BAID | Client ID | Address ID | Business Name |
|---|---|---|---|
| All | | | |

| | | |
|---|---|---|
| Bid Request | BID | Coordinator |

| Coordinator Group |
|---|
| EA0331 |
| EA0331_COORDINATORNE |
| EA0331_AGMTVIEWJULY |

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

# Congratulations!

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

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

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

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

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