Electronic Assignments
Procedures guide

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Government
of Alberta

Government of Alberta ■

1   INTRODUCTION

1.1   What are Electronic Assignments?

- The electronic assignments program facilitates the electronic assignment of surface dispositions issued under the *Public Lands Act* within the province of Alberta. Electronic assignments encompass all transactions, documents, and data exchanges associated with the assignment of the disposition holder's interest in the surface disposition to another party.

- The electronic assignment Life cycle is the assignment of registered interest in the Public Land Surface Dispositions handled electronically using a web interface.

- The processes are:

    o Registration of Industry clients as an Electronic Transfer System (ETS) client
    o Designation of sign-on authorizations within own company
    o Identification of dispositions to be assigned
    o Preparation of electronic assignment requests
    o Concurrence by all clients involved in the assignment process
    o Submission of assignment documents to Sustainable Resource Development for review and approval or rejection
    o Electronic notification will be generated by ETS for the approval, rejection, or cancellation of a request. In the case of an approval, a Memorandum of Registration (MOR) will be available electronically to the client(s) involved in the assignment

- This program does not include the partial assignment of surface dispositions.

2 OVERVIEW

The ETS will be used to process assignment of registered interest in Public Land surface dispositions.

ETS-Electronic Transfer System is accessed through the Alberta website at https://www.alberta.ca/Electronic-transfer-system.aspx

The electronic assignments program is one of many programs that ETS handles. It can also be used for accessing and conveying information for a number of different applications, such as Land Searches or e-Transfers. For further details please see the ETS Overview document under Account Administration in ETS Support and Online Learning.

3 GETTING STARTED

3.1 New Client or Existing Client?
- Go to website https://www.alberta.ca/Electronic-transfer-system.aspx
- Click on ETS icon

Introduction

The Electronic Transfer System (ETS) provides secure business access for account holders, services of ETS are outlined in ETS support and online learning ↗.

ETS supports the latest version of the following browsers:

- Internet Explorer
- Chrome
- Firefox
- Microsoft Edge

Accessing ETS

ETS log in ↗

Forgot Password/Reset Password ↗

A password is required for this system. The Primary Administrator and the Backup Administrator have a critical role, they are responsible for setting up access and managing the security for all their users on ETS, including passwords. Please note – Crown Land Data is only authorized to work with the Primary Administrator or the Backup Administrator.

4 LOGGING IN

User Name - When you click on the ETS link you will be prompted for a User Name. This field corresponds to the Account Id (e.g. EN0001).

Password - You will be prompted to insert your password.

Login - Once you have correctly inserted your login Id and password, click on the Login button.
You will now be able to access the options that your ETS Account Id has been authorized for.

For further details regarding user name and passwords please refer to client account manual and handbook in ETS Support and Online Learning.

5 ETS OPTIONS

The ETS menu on the left side of your screen outlines the menu options available to you when you first log into the ETS system.

Note: Only those options signed up to the user will be displayed. (e.g. Assignments)

You may expand the Assignments menu by clicking on the ⊞ symbol.

6 ASSIGNMENTS

Full – Allows you to create an assignment.

Work in Progress – Allows you to view the status and details of an existing assignment request.
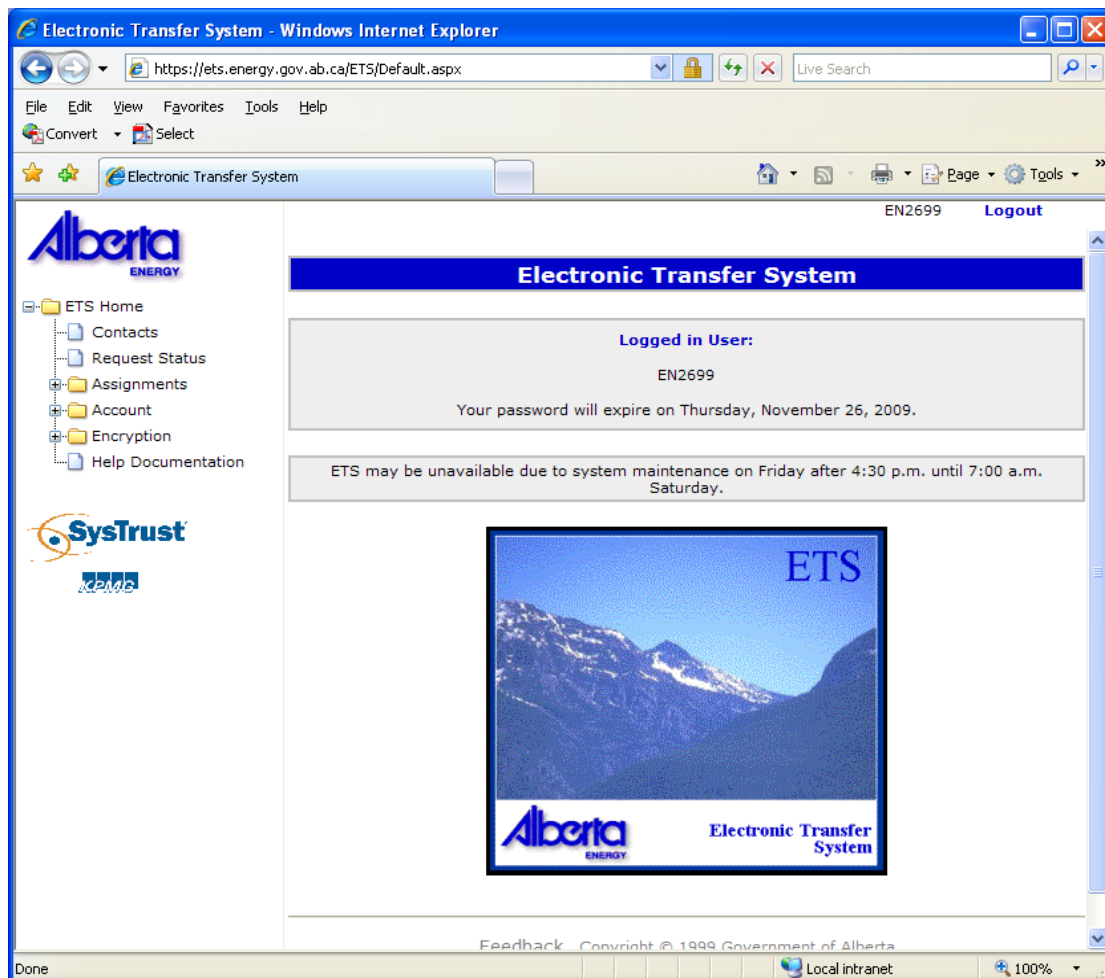
7   INITIATE ASSIGNMENT

7.1 Search Activities

To search activities, click the Assignments link then click Full under the ETS menu.

Search - Click the Search Button to open Search Activities Screen

7.2 Search Options

Users will be able to search for activities by: Activity Type and Number, Client Id, Land, or inserting an existing list under Use Input File.

Valid Activity Types are: LOC, EZE, MSL, PLA, PIL, VCE.

You may search by one or all of the above options.

Selection of multiple options will refine your search criteria.

The initial screen will provide capacity for 10 activity numbers.

More Activities - Clicking on will display 10 more rows of activity type and number boxes.

Search by Activity - You may enter up to 1000 activities in the Search by Activity option.

7.2.1 Search By Activity

For an exact match, insert the 3-letter activity type and the activity number in the text field.

Note: The 3 letter type may be left blank; however, if there is more than one activity type with that number, the search results will display all agreement types matching that number.

Activity Type Code Table - Click on Activity Type Code Table for a complete listing of all activity type codes. This option provides you with a drop down list of all of the activity types.

7.2.2 Search By Client ID

Insert the 7 digit Land Status Automated System (LSAS) Client Id and the 3-digit Client Address Id. i.e.8029377-001

8029377 is the 7 digit client Id for Company A
001 is the 3-digit client address Id for Company A

[...] Find Client**:** If you do not know the Client Id, click this icon. This takes you to the Find Client screen, which provides search functionality for client name or client Id.

7.2.3 Search By Land

You may search for agreements within a specified location by identifying
- Meridian (M),
- Range (Rge),
- Township (Twp),
- Section (Sec), and
- Quarter Sections (QS), or, within a range of land keys.

All fields, *except* for the QS field are mandatory.

You **MUST** enter a land description in both the **From** and **To** fields.

Note: Searching by lands will take longer than searching by either of the previous search options especially if you choose to search a large area.

You may search across multiple ranges or multiple townships or multiple sections, but you may **NOT** search across multiple Meridians.

The Search by Land key searches from the North West co-ordinate to the South East co-ordinate of the land keys provided and searches within the squared off boundaries of these land keys.

7.2.4 Use Input File:

If you have utilized your in-house system to create a listing of activities to be assigned, you may import your file into the Search screen.

You may insert up to 1000 activities.
The imported file must be in a pre-defined format, as per the following criteria:
- a header line of "TYPE,NUMBER" without the quotations
- 3-letter activity type, a comma, and activity number for the remaining lines

Here's an example:
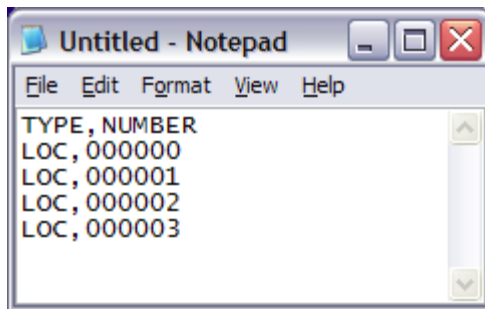
Note: Saving your file in a text format using Notepad will create the proper file format.

Browse - Use the button to locate and insert your file from your stored location.

Submit - Click on to insert your query into the Search by Activity option

Search - Opens activities found based on the search criteria entered

Reset - Clears screen of all entered information

Close - Closes screen

7.3 Find Client

The Find Client screen allows the user to find a client either by specifying a name or client id. Click the drop down menu to change from Client ID to Client Name.

The results will only display clients that are ACTIVE and the client type is SURFACE or BOTH.

Find Client

ClientName ⌄	share all	Find			
Client ID	Client Name		ETS Acct	Address	
004-9024 001	SHARE ALL FARMS LTD.		Yes	SECRETARY TREASURER PO BOX 38 MARWAYNE AB T0B 2X0	Select

[Select Blank]   [Close]

Client ID - Displays a list of client id's that match your selection criteria.

Client Name - Displays the corresponding client's name in LSAS. (4 characters min)

Select Blank - Returns to previous screen without a selection

ETS Account - YES or NO indicates if the client has an ETS account. If the client you select does NOT have an ETS account, he cannot access ETS. Contact that specific client to obtain an ETS Account. (*See ETS Account Set Up/Change Form*).

Close - Closes screen

Address - Displays the Official Service Address according to the Records of the Dept. for each client.

Select - Click here to select the client involved in the transfer. This action will populate the Client ID into the initial Search Activities screen.

Note: Only agreements for the client selected here will be displayed on the search agreement screen. If a client has multiple client ids, it is important that you select the entire client Ids to ensure an accurate search is obtained.

7.4   Activities Found

Activities Found screen displays all the activities found in ascending Activity Type and Activity Number order.

Any Activity that is not valid for the electronic Assignment will be shown as Invalid Activity at the top of the screen under a warning heading. At the bottom of the screen it will display the number of activities found based on the search criteria entered.

Clicking on the + will display the participant name and whether or not that participant holds an ETS account.

Clicking on the - will hide participant details.

Clicking in Activity Number will display details about that disposition

Pending - This field indicates if there is an assignment pending for the activity displayed.

An Assignor's undivided interest is locked once the assignment is in Pending status

Land - Meridian, Range, Township of the assignment will be displayed.

Activities - Putting a check mark in the activities header will select all the activities listed in the Activities Found screen.

OK - Clicking on OK button will populate the activities in the Assignment Request screen.

CANCEL - Clicking on the CANCEL button will take you back to the Search Activities screen.

8 CREATE ASSIGNMENT REQUEST

Left Arrow Button – User can navigate to previous tab by clicking on this button. (If on first tab will take you to last tab)

Right Arrow Button – User can navigate to next tab by clicking on this button. (If on last tab will take you to first tab)

Close Button – A pop up will display with the message "Any unsaved changes will be lost. Are you sure you want to close the current assignment request?"
- o OK Button - Continue closing the screen and move control to ETS Home screen.
- o Cancel Button - Cancel closing the screen and return to assignment request screen.

Save Button - The assignment request will be saved to ETS.
- o First Time Save – Assignment will be assigned a request number. The request number will be displayed on the header caption of the assignment request screen after the words Assignment Request. Example: Assignment Request 4993.
- o Successful Save – Message will display "Data saved successfully"
  - ▪ OK button - Closes dialog window.

EA0257   **Logout**

Alberta ENERGY

- ETS Home
  - Contacts
  - Request Status
  - Assignments
    - Full
    - Work in Progress
  - Account
  - Encryption
  - Help Documentation

SysTrust

KPMG

Assignment Request 310289

Assignment Rules
View Assignment Document

Activity	Assignor/ Assignee	Service Address	Email	Status / Warnings

Activity	Service Address	Land	Qtr(s)	
+ MSL 051984	004-9024 001 SHARE ALL FARMS LTD.	6-09-065	1	Delete
+ MSL 052002	004-9024 001 SHARE ALL FARMS LTD.	4-02-049	1	Delete
+ MSL 052003	004-9024 001 SHARE ALL FARMS LTD.	6-09-065	1	Delete
+ MSL 052005	004-9024 001 SHARE ALL FARMS LTD.	4-08-063	1	Delete
+ MSL 052074	004-9024 001 SHARE ALL FARMS LTD.	6-08-064	1	Delete

5 Activities Selected

Search

◄   Submit   Save   Delete   Close   ►

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8.1 Activity Tab

This tab displays the activities that are being assigned. The activities displayed are the ones selected from the previous **Activities Found** screen.

The user can delete or add new activity(s) to include in this assignment request.

Search - will open the **Search Activities** screen, to add another activity to the Assignment screen.

Delete -will delete the activity displayed on that line.

IMPORTANT!
An Assignment Request Number will be assigned by ETS when an assignment is first saved. Make sure you note this number, as you will use it to access the Request through the Work In Progress (WIP) screen.

8.2   Assignor/Assignee Tab

Identifies who the assignor is for the activities and who the assignee will be. Assignees may
be removed from the tab while the assignment is at work in progress.

- Initially the assignee grid will be empty

- If the client has not been set up on ETS the assignment will not be able to be
  submitted

Add Assignee - Opens Find Client screen so that a new lessee may be selected.

EA0257   **Logout**

Assignment Request 310289

Assignment Rules

Client Errors
Activity MSL 051984 New Service Address must be entered.
Activity MSL 052002 New Service Address must be entered.
Activity MSL 052003 New Service Address must be entered.
Activity MSL 052005 New Service Address must be entered.
Activity MSL 052074 New Service Address must be entered.
Page 1

View Assignment Document

Activity	Assignor/ Assignee	Service Address	Email	Status / Warnings

	Activity	Service Address	Land	Qtr(s)	
+	MSL 051984	004-9024 001 SHARE ALL FARMS LTD.	6-09-065	1	Delete
+	MSL 052002	004-9024 001 SHARE ALL FARMS LTD.	4-02-049	1	Delete
+	MSL 052003	004-9024 001 SHARE ALL FARMS LTD.	6-09-065	1	Delete
+	MSL 052005	004-9024 001 SHARE ALL FARMS LTD.	4-08-063	1	Delete
+	MSL 052074	004-9024 001 SHARE ALL FARMS LTD.	6-08-064	1	Delete

5 Activities Selected

Search

◄   Submit   Save   Delete   Close   ►

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8.3   Service Address Tab

The purpose of the Service Address Tab is to assign a New Service Address for all activities in the Assignment Request.

- Message at top of screen will say "NOTE: NEW SERVICE ADDRESS WILL BE RESPONSIBLE TO PAY ASSIGNMENT FEE INDICATED." This message is meant to make the creator aware that they indicate as New Service of Address will be required to pay the Fee.

- Displayed at the bottom of the screen will be the total quarters and fees for assignment. See screen for placement.

- The New Service Address can only be changed to the Assignee indicated on the Assignor/Assignee tab.

- When the request is saved or validated it will check that the New Service Address is the assignee.

- [...] - Choose client for New Service Address.

- **Clear** - Clears Change Service Address field.

8.4 Status / Warning Tab

The purpose of tab is to:

- Display information on who created assignment request.
- Validate the assignment and display errors and warnings.
- Link to Assignment Document.
- If assignment request is rejected client is able to copy assignment to new request.

When the request has been validated the View Assignments Document link will display. See Reports for a description of this document. Clicking on this button will open the PDF file in a new browser window. From this window user will be able to save or print the Assignment.

8.5 Email Tab

This tab will allow the users to specify an email address where they want the concurrence email to go. If an email address is not specified then an email message will be sent to all clients with the concurrence role who are part of this assignment.

Assignment Request 310289

Assignment Rules
View Assignment Document

Activity	Assignor/ Assignee	Service Address	Email	Status / Warnings

* Only fill in Email address if other than default

Client	Email Address
804-3982 001 101047838 SASKATCHEWAN LTD.	
004-9024 001 SHARE ALL FARMS LTD.	

◄   [Submit]   [Save]   [Delete]   [Close]   ►

Client - Displays the Client Id and Client Name of all the clients that are part of the Assignment Request.

Email Address - Optional Field Creator may specify a specific individual that they would like the concurrence email to go to for a specific company.

9   WORK IN PROGRESS

Work in Progress is accessible from the ETS menu under Assignments. This screen will allow the user to preview, open or concur to any assignment request. The access that they have will depend on the roles that have been assigned to them.

If a client types in an assignment number the rest of the selection criteria is ignored. Any field in the selection criteria can be left blank to return a result set that ignores that field.

Type - Defaults to Full Assignment.

Request Number - If request number is known it may be entered.

Start Date - Defaults to today's date minus number of days specified in user Account Preferences screen and can be changed.

End Date - Defaults to today's date and can be changed.

Status (Search Criteria) - Defaults to Blank which would return all status or from drop down can choose a status. Internal and External Clients status list will be different. Refer to WIP tab for a list of status and who can see status.

Account - This drop down includes all client accounts that are assigned Assignment Request permissions and that are managed by the logged on system site administrator account (this field does not show except for administrators and internal users). This field helps in filtering out the returned result set by assignment requests.

Find Button - After filling in parameters, the client clicks on Find and the corresponding results will be displayed.

Close - Closes screen and returns client back to ETS Home Page.

 # (Request Number) "Arrow"- Request Number Clicking on arrow will reorder the results in ascending or descending order.

"Magnifying Glass"- Provides details for the request. See Assignment Request Detail for more information.

Form - FAssign will be the form type for Full Assignments and will be displayed here.
Client can click on this field to re-open the request.
This link is disabled when the request is set to concurrence

Comment - Creators comments that were added to the request.

Status - Displays the status of the request.
If the status is Concurrence the accounts that have been set up for concurrence can click on this field and the Concur Assignment Request screen will open.
Clicking on status in column heading will sort the results by status.

Available Documents - Displays PDF and XML version of the Original Assignment Request.
XML will not be created until the status is complete.
Displays PDF and XML version of final document to client when an assignment is approved.
Clicking any of these links opens the corresponding Original file.

Initiator - Company that initiated the request.

10 ASSIGNMENT REQUEST DETAIL

This screen will allow the users to view details about an assignment.

Initiated By - Displays company name that initiated the request

Created By - ETS Account that created the request

Request Number - Number assigned to request

Creation Date - Date request was created

Status - Status of the Assignment Request See Status/Warnings Tab for a description on all status

Validation Date - Not used

Registration Number - Number Assigned to Request. The numbering will be restarted every year since the first two digits of the 7 unique digit is the yy of the current year

Submitted Date - Date Assignment was received by the Department

Completion Date - Date Assignment Request was completed

Assignment Type - Displays the type of Assignment. (Defaults to Full Assignment)

Comment - Comment creator entered for request

Department Remarks - Remarks that DTSB entered

Client - Client Id and Name of company that is required to concur on Assignment Request

Concur - Displays whether the client has concurred to the request

Remarks - Any remarks that a client may have entered when concurring to the Assignment Request

11 CONCURRENCE

This screen will allow the users to review and Concur the request. Any remarks can be added if the user wishes to do so. Concurrence dropdown will be available only to the company whose name is listed beside it. It will not be accessible to internal users since for external requests they are not seen till they reach pending status and for internal requests concurrence is done automatically by the system. The Concurrence screen is accessible from the WIP when the status of a request is concurrence. Click on the status field and the Concur Assignment Request screen will open

Client - Lists all companies that are required to concur to Assignment Request.
Client Id and Company Name

Concur - Defaults to Blank. Client with the concur role can choose YES or NO

Remarks – Optional Client can enter a remark

View Assignment Document - Link to Original Assignment Document PDF. Allows the concurred to view before changing whether they concur to request or not

Submit - Submits client response. After client submits response they will be unable to change concur.

Close - Closes screen

12 MEMORANDUM OF REGISTRATION

This document will be created by ETS in the PDF and XML formats

MEMORANDUM OF REGISTRATION

Registration Number: 0301523   Registration Date: November 9, 2005

The assignment of the Surface Disposition(s) indicated as per assignment request below has been approved and registered in the department's records effective the registration date. As of this date, the assignee will be responsible for complying with all the terms and conditions of the assigned disposition(s).

Assignment Request

Initiated by: 804 7899 001 – DEVON CANADA
Request Number: 00123456
Creation Date: Oct 31, 2005 12:00:00
Registration Number: 0301523
Registration Date: Nov 9, 2005
Assignment Type: Full

The new Service Address will be responsible for paying Assignment Fee

Old Service Address	New Service Address
804 7899 001 – Devon Canada	800 1327 001 - Shell
Suite 2000, 400, 3 Ave SW	400, 4 Ave SW
Calgary Alberta, T2P 4H2	Calgary Alberta T2P 2H5

DISCLAIMER

This document is not to be modified in any way. Any errors or omissions must be forwarded to the Department immediately.

The original of this document is filed at the offices of Sustainable Resource Development, Land Dispositions Branch, 9915 – 108 Street, Edmonton, Alberta. The original will be used as the authority should any discrepancies arise in content of subsequent copies of the original.

Disposition	Assignor	Assignee	Qtr(s)	Fee
LOC 12345	Devon Canada	Shell	4	$ 40.00
LOC 12346	Devon Canada /Amoco	Shell	4	$ 40.00
LOC 12347	Devon Canada	Shell	4	$ 40.00
TOTAL			**12**	**$120.00**

13 CLIENT ROLES (SITE ADMINISTRATOR ONLY)

For details please see ETS Administration.

14 WORKFLOW

The workflow will be controlled by the Site Administrator assigning roles and request statuses set by the users

Creating an Assignment - When an assignment is created and saved into the database, a Request Number will be generated and the status of the assignment will be set to WIP (Work in Progress) and only visible to the **CREATOR** role. Once the **CREATOR** is satisfied with and validated the assignment, the status can then be changed to REVIEWER **APPROVAL**. The **REVIEWER** can then access the assignment.

Submitting an Assignment - The **REVIEWER** will review the assignment and change the status to **CONCURRENCE**. As soon as the status is changed to **CONCURRENCE**; ETS will automatically send e-mail to external concurred indicating the Request Number of the Assignment and Concurrence is required. Interest will be locked at this point.

Concurring Assignment - The user with the **CONCURRER** role will be able to **CONCUR** to the assignment request. The **CONCUR** field will default to blank and the **CONCURRER** will have the option to select "YES" or "NO" and add a remark if necessary. If the assignment is set to "NO" at this point, the assignment status will automatically be set to "CLIENT REJECT" and no further processing can be done on this assignment. Assignment can be copied by the creator at this time.

CONCUR is set to "YES" by all parties involved in the assignment, the status will then changed to **"PENDING"**.

Validating Assignment - The assignment request can be validated at anytime the assignment is in "Work in Process" (WIP). Errors and Warnings (if any) will be tagged to the request that must be resolved before proceeding further. Assignment request must be validated when the status is changed from "Work in Progress" to **"REVIEWER APPROVAL"** and **"CONCURRENCE"**. Validation also occurs when the assignment is received by the Department. **"VALIDATION STATUS"** in this case is only visible to the Department. External Clients will see Status of **"PENDING"**.

15 ELECTRONIC ASSIGNMENT BUSINESS RULES

- Activities can only be assigned to another O&G company/individual who holds the subsurface rights to work the minerals.

- Only one (1) Assignor and (1) Assignee per Assignment Request

- Assignment of an LOC to a non-specified holder (FMA) cannot be submitted electronically and must be submitted using conventional paper process.

- An assignment having activities with only a Plan Block Lot (PBL) legal description cannot be submitted electronically and must be submitted using conventional paper process.

- Only Full Assignments Requests can be submitted electronically.

- Only 1000 activities can be listed per Assignment Request.

- Activities at the application or application for amendment status are non-assignable.

- Assignment fee will be included on the CARS monthly statement. Those clients not on monthly statement system will receive a separate invoice for each activity of the assignment.

- When an Assignment Request is submitted to the department for manual processing the lessee of the activity being assigned will be the Assignor.

- The Assignee must be registered and in good standing with Alberta Government Services, Corporate Registry.

- The Assignee cannot be indebted to the Crown.