## Introduction

The OGA does not impose the confidentiality arrangements that companies must abide by; instead PEARS allows each company to control access to its own data and casework, by extending access rights to such individuals as it thinks fit. Each individual will have his or her own password-protected account; this is an important part of PEARS’ security.

Licensees organise account-holders into **teams** to deal with their Portal casework. There are two levels of team: a Top-Level Team, which is a standing team that manages the company’s casework, and which includes one or more Case Managers (among others); and specific Casework Teams, each of which is a temporary team created to deal with a specific case by a Case Manager from the Top-Level Team. A licensee assigns an account-holder to a team, and so grants access to a certain amount of information, by allocating one or more **roles** within that team to the account-holder.

The first step for any user who wants to use PEARS is to get a Portal account.

## Teams

The **Top-Level Team** is a standing team that can oversee a company’s[[1]](#footnote-1) dealings in the Portal.

* The Top-Level Team **Access Manager** allocates the other roles within the Top-Level Team, and is responsible for keeping these roles up to date. For example when an account-holder leaves the company it is the Access Manager’s responsibility to remove that person’ rights to access the company’s data and casework.
* **Application Case Managers** deal with assignments, apportionments of rights, operatorships, licence administrator changes, surrenders and relinquishments.
* **Data Check Managers** deal with any discrepancies between OGA’s records and actual documentation.
* **Licensee Review Managers** deal with corrections requested by Data Check Managers at other parties to the same licence.
* **Viewers** can see all of a company’s data and casework.
* **Licensing Contacts** will be the contact point for licensing news and advice from the OGA.

Each **Application Case Manager** can create a specific **Application Case**, and create the team that will deal with it by assigning roles to account-holders; similarly for **Data Check Managers** and **Data Check Cases**.

## Roles

The **Access Manager** controls membership of the company’s permanent Top-Level Team and allocates roles within it. It is the Access Manager’s responsibility to manage access to his company’s information, and he is free to do so in whatever way best suits the company’s internal arrangements; so more than one person can be allocated the same role, and one person can be allocated several different roles.

For example, within a team processing an Assignment, one person might be allocated the role of Application Editor, so that this person can assemble the application but not submit it to the OGA, while another person might be allocated the role of Application Submitter so that this person cannot edit the case but can submit it to the OGA. Alternatively, a single person might be allocated both roles, so that this person can both assemble and submit the case; or two people might each be allocated the role of Application Editor, so that a cartographer can input coordinates and a paralegal can input the commercial aspects.

The Case Manager roles exist at both levels; since they have a permanent status of being able to create cases at any time they are members of the Top-Level Team; and every time they create a team to handle a case they automatically become the first member of the team that will handle it.

Only one member of a Case Team can have ‘ownership’ of a case at any one time. Once a team member has finished with a case, the last part of his job is to reassign it to the next team member in the chain. However, the Case Manager can reallocate the case if necessary (for example if the current owner is absent).

Any role can be allocated to any account-holder, even those who don’t work for the company allocating the role. This degree of freedom is necessary so that companies can pass casework to external contractors, such as law firms. Each company is responsible for the way that it allocates its own roles.

## Top-level team

This is a standing team at the top level of the company, whose members control access to the company’s data and casework.

* Top-Level Team **Access Manager**
	+ Adds and removes members of the Top-Level Team (**Application Manager, Data Check Manager, Viewer and Licensing Contact**) and has overall responsibility for ensuring that access rights and privileges remain correct and up to date.
* **Application Manager**
	+ Creates a new **Application Case** (assignments, apportionments of rights, operatorships, licence administrator changes, surrenders and relinquishments), specifies the licence(s) affected by each application and creates the team that will handle it (the **Application Case Team**).
	+ Can take an application from one team member and give it to another if necessary (for example, if the person dealing with a case is absent unexpectedly).
* **Data Check Manager**
	+ When an Application Manager creates a new case, PEARS will check to see if all those records that are implicated have already been verified by a Data Check Case. If not, PEARS will notify all the company’s Data Check Managers that it has created a Data Check. One of them will have to take ownership of it to verify the implicated data.
	+ Initiates an ad hoc data check or licence correction and adds licence (one licence per case).
	+ Sets up the team that will process the ad hoc data check or licence correction (**Data Check Team**).
	+ Sets up the team that will process a data amendment case submitted by another party to the licence (**Licence Review Team**).
	+ Can reassign data cases should ‘ownership’ need changing.
* **Viewer**
	+ Can view all the company’s data and casework but cannot edit or process a case. (To give an account-holder read-only access to a specific case only, use the Viewer role within the Case Team.)
* **Licensing Contact**
	+ Contact that will receive licensing advice, consultations and news from the OGA.

## Application Case Team

This team is initially managed by the Top-Level Team **Application Manager** to process an assignment or relinquishment application. Day to day management of an application can be delegated by designating an **Access Manager** to the **Application Case Team**.

* **Application Case Team Access Manager**
	+ Cannot set up the team but can allocate roles, add or remove team members, at any time.
* **Application Editor**
	+ Tailors and edits the Application.
	+ Takes Ownership /Releases ownership of an application.
* **Application Submitter**
	+ Submits the Application to the OGA.
* **Application Executor**
	+ Submits the notification of execution to the OGA (not for licence terminations or standard surrenders of acreage, because OGA’s acknowledgement records execution).
* **Application Contact**
	+ Point of contact for the OGA for the application (recipient of OGA consent and relinquishment schedules and notification of execution.
* **Application Viewer**
	+ Has read-only access for the Case

## Data Check Team

The OGA bases its decisions largely on its own records and Data Check Cases are necessary to ensure they match the paperwork held by licensees. PEARS allows licensees to check and verify or correct OGA’s records of their licences by means of a **Data Check Case**.

A Data Check Case is processed by a **Data Check Team**. This team is created by one of the **Data Check Managers** in the Top-Level Team to process a specific data check.

When an Application Manager creates a new case, PEARS will check to see if all of OGA’s records that are implicated have already been verified by a Data Check Case. If not, it will create a Data Check Case and notify all the Data Check Managers at that company; one of them will have to take ownership of it to verify or correct OGA’s records. We recommend Data Checks should be done in good time, without waiting until an Application Case is waiting; OGA does not accept any responsibility if it’s left till the last minute and that causes delay that could have been avoided.

When considering whether or not a Data Check is necessary to process an Application Case, PEARS will treat each subarea separately. For example, a change to a beneficial interests and/or the operatorship on a single subarea has no effect on other subareas within the same licence so only the records relating to that subarea will have to be checked; however, licensee changes affect the whole licence and therefore all subareas, so all the Licence data will have to be checked for a licence assignment.

Each Data Check Case relates to a single licence and there will be a separate **Data Check Team** for each Data Check Case, so if data needs to be checked for an Application Case involving five licences it will need five Data Check Teams to process it. Obviously, though, the same team members can be assigned to each team and this can be done easily by using the copy/paste buttons. Day-to-day management of a data check case can be delegated by designating an **Access Manager** to the **Data Check Team**

* **Data Check Team Access Manager**
	+ Cannot set up the team but can allocate roles, add or remove team members, at any time.
* **Data Checker**
	+ Takes ownership of the case and processes the data check.
* **Data Check Submitter**
	+ Submits the Data Check Case. If proposing a change to OGA’s records, it will be submitted to a Licensee Review Team at each licence partner for review before OGA considers it; otherwise it will be submitted to the OGA as confirmation of the accuracy of OGA’s
	+ records and merely copied to Licensee Review Teams at partners for information.
	+ Can pass the data check back to the Data Checker/Viewer for further amendment
* **Data Check Contact**
	+ Receives notification from OGA of approval or rejection of a data check.
* **Viewer**
	+ Has read-only access.

## Licensee Review Team

This team carries out a review of any proposed change to OGA’s records submitted by a Data Check Team at another company on a licence.

PEARS will automatically create a case for each party to the licence and notify all its Data Check Managers; one of whom will take ownership and create a team to process it. OR PEARS will notify all the Data Check Managers at each partner to the licence and one of them will have to create a case to process it.

Day-to-day management of a licence change case can be delegated by designating an **Access Manager** to the **Licence Review Team.**

* **Licence Review Team Access Manager**
	+ Cannot set up the team but can allocate roles, add or remove team members, at any time.
* **Licensee Reviewer**
	+ Can view the new position as a result of any amendments made to the licence by the organisation that submitted the data check.
	+ For each amendment may select an option to dispute the position and will be required to upload documentation showing why the position is disputed.
1. Generally, the Portal treats the Company Group as the basic corporate unit. For example, when one company proposes that OGA should amend its records about a licence, PEARS will automatically notify all the company groups that have one or more subsidiaries on that licence, rather than sending one notification per subsidiary. Where this guidance refers to a company, it should generally be understood to mean a company group. [↑](#footnote-ref-1)