



Exploration Archives 4.5

Contracts

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Talus Technologies
Suite #2325, 330-5th Ave SW,
Calgary, AB, T2P 0L4
+1 403.283.8559

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1.0 Contracts

The **Contract** module is available for managing, editing and viewing details of contract-related documentation.

For a fluid workflow, contracts link to the Data Request process, business associates, media, seismic and files.

To open items in the **Contract** module:

1. Click **search** next to **Contract** in the Navigation panel. There are 2 types of searches available:

» **Contract Search:** Allows you to configure search fields and fetch a specified number of records to add or populate the Contract Properties Grid.

Search File Records

Page 1

File ID

Description

File Location

Processed By

Processed Date

File Server

Digital Format

Created By

Changed By

File Category

File Sub Category

Title

Original File Name

Catalog ID

INTERMEDIATE

ATTRIBUTES

Clear

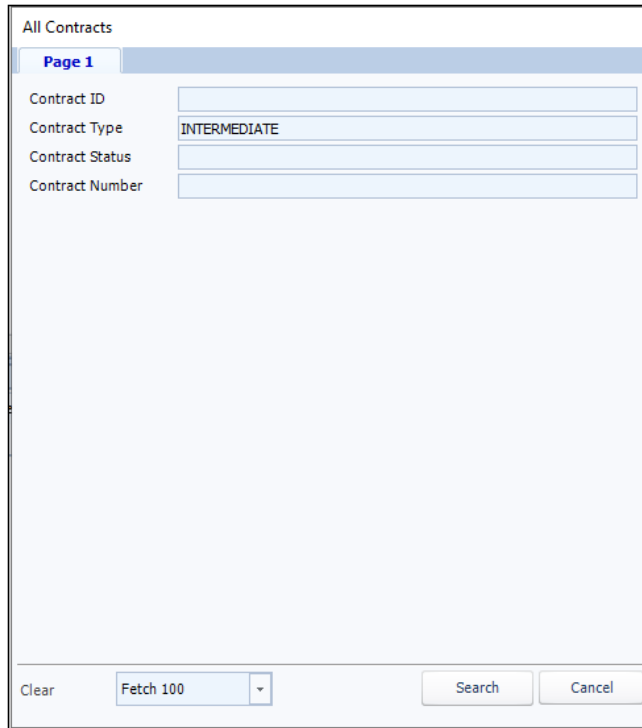
<Fetch All>

Search

Cancel

» **All Contracts:** Lets you search by Contract ID, Contract Type, Contract Status, or Contract

Number.



All Contracts

Page 1

Contract ID

Contract Type INTERMEDIATE

Contract Status

Contract Number

Clear Fetch 100 Search Cancel

2. Enter your filter values and click **Search**. The results open in the **Contract** module.

The **Contract Properties** grid displays the information for each item.

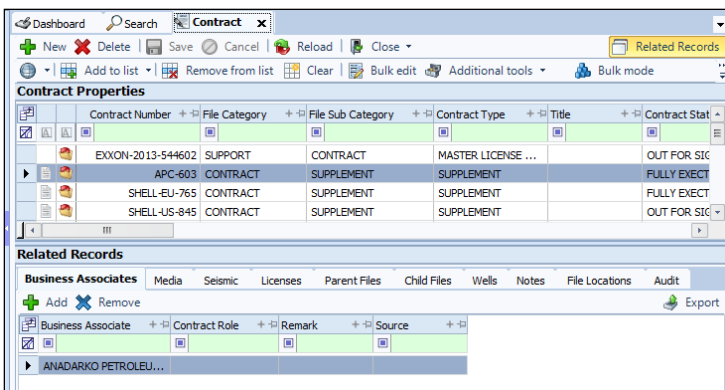
New in this version:

This release, we have added new attributes to the Contract Properties grid:

- » Commercial Type
- » Derivation Owner Type
- » Export Grant Effective/Termination Dates
- » Expiry Retention Type/Duration

To view the **Related Records** for an item, click on a row in the **Contract Properties** grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Contract Properties** grid and the associated information for all selected items display in the **Related Records** tabs.



The **Contract** module is available for managing, editing and viewing details of contract-related documentation.

For a fluid workflow, contracts link to the Data Request process, business associates, media, seismic and files.

To open items in the **Contract** module:

1. Click **search** next to **Contract** in the Navigation panel. There are 2 types of searches available:
 - » **Contract Search:** Allows you to configure search fields and fetch a specified number of records to add or populate the Contract Properties Grid.

The screenshot shows the 'Search File Records' dialog box. It has a 'Page 1' tab. The dialog contains a list of search fields on the left and corresponding input fields on the right. The fields are: File ID, Description, File Location, Processed By, Processed Date, File Server, Digital Format, Created By, Changed By, File Category, File Sub Category, Title, Original File Name, and Catalog ID. The 'File Sub Category' field is currently set to 'ATTRIBUTES'. At the bottom, there are buttons for 'Clear', '<Fetch All>', 'Search', and 'Cancel'.

- » **All Contracts:** Lets you search by Contract ID, Contract Type, Contract Status, or Contract Number.

All Contracts

Page 1

Contract ID

Contract Type
INTERMEDIATE

Contract Status

Contract Number

Clear
Fetch 100
Search
Cancel

2. Enter your filter values and click **Search**.

The results open in the **Contract** module. The **Contract Properties** grid displays the information for each item. To view the **Related Records** for an item, click on a row in the **Contract Properties** grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Contract Properties** grid and the associated information for all selected items display in the **Related Records** tabs.

Dashboard
Search
Contract
New
Delete
Save
Cancel
Reload
Close
Related Records
Add to list
Remove from list
Clear
Bulk edit
Additional tools
Bulk mode

Contract Properties

	Contract Number	File Category	File Sub Category	Contract Type	Title	Contract Stat
	EXXON-2013-544602	SUPPORT	CONTRACT	MASTER LICENSE ...		OUT FOR SIC
	APC-603	CONTRACT	SUPPLEMENT	SUPPLEMENT		FULLY EXECT
	SHELL-EU-765	CONTRACT	SUPPLEMENT	SUPPLEMENT		FULLY EXECT
	SHELL-US-845	CONTRACT	SUPPLEMENT	SUPPLEMENT		OUT FOR SIC

Related Records

Business Associates
Media
Seismic
Licenses
Parent Files
Child Files
Wells
Notes
File Locations
Audit
Add
Remove
Export

Business Associate	Contract Role	Remark	Source
ANADARKO PETROLEU...			

2.0 Add a contract

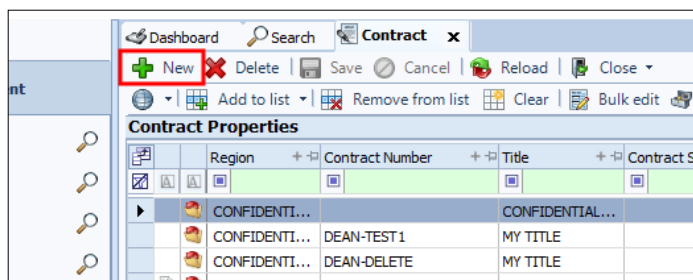
Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

**Note:**

Before adding the contract, you must have at least one seismic record ready to link to the contract.

To add a new contract in the Contract Module:

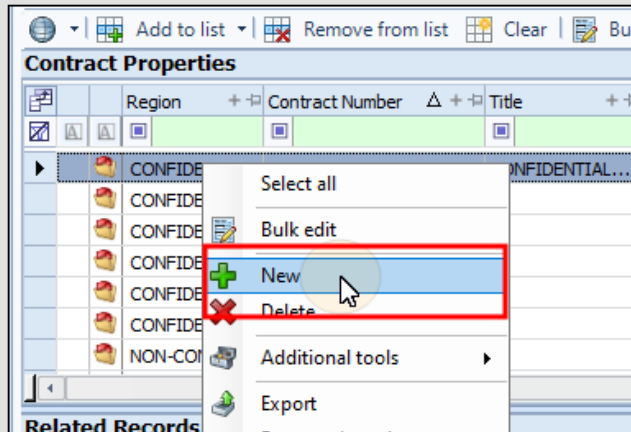
1. In the toolbar, click **New**.



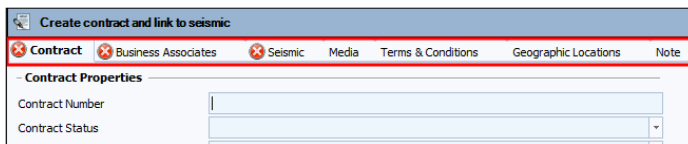


Tip:

Alternatively, you can right-click a row in the Contact Properties grid to open the context menu then click **New**.



2. The **Create contract and link to seismic** window opens with several tabs available for entering associated information.



Each tab has a specific function

- » **Contract:** you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
 - » **Business Associates:** See: "Assign or add a business associate" on page 14
 - » **Seismic:** See: "Linking seismic to a new contract" on page 16
 - » **Media:** See: "Add the contract media " on page 30
 - » **Terms and Conditions:** This tab allows you to attach Terms and Conditions to the contract. See: "Add Terms and Conditions" on page 24
 - » **Geographic Locations:** You can add different Geographic Locations . See: "Add Geographic Locations" on page 26
 - » **Note:** See: "Add a note with a contract" on page 29
3. Once you complete the form, click **Save**. The window will close and the new contract will be added to the grid.



Note:

A Contract ID will be generated for the new contract. An administrator can configure the Contract ID to have a custom prefix added to it.

Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

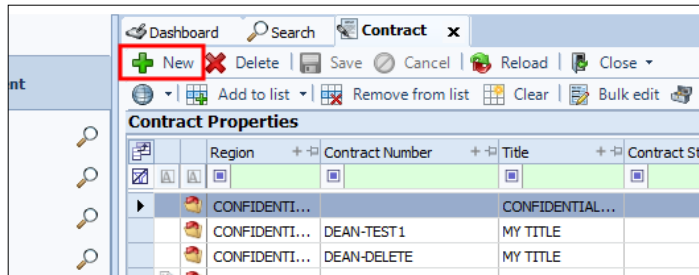


Note:

Before adding the contract, you must have at least one seismic record or Business Associate ready to link to the contract.

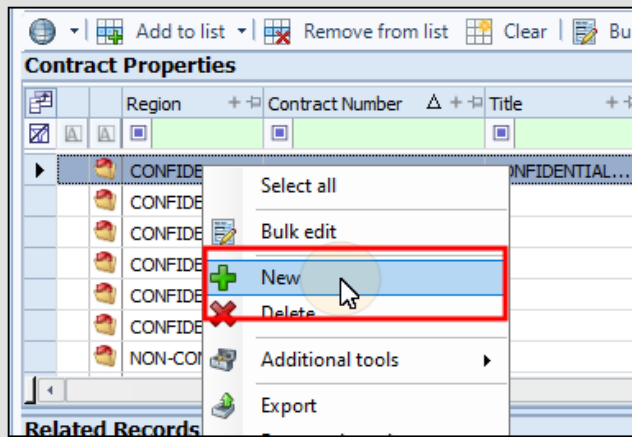
To add a new contract in the Contract Module:

1. In the toolbar, click **New**.

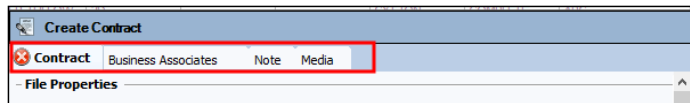


**Tip:**

Alternatively, you can right-click a row in the Contact Properties grid to open the context menu then click **New**.



2. The **Create contract** window opens with several tabs available for entering associated information.



Each tab has a specific function

- » **Contract:** you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
- » **Business Associates:** See: "Assign or add a business associate" on page 14
- » **Note:** See: "Add a note with a contract" on page 29
- » **Media:** See: "Add the contract media " on page 30

3.0 Assign or add a business associate

When creating and "Add a contract" on page 9, Business Associates can be attached.



Note:

At least one Business Associate or Seismic Record is required when creating a contract.

There are 2 actions you can take when adding a Business Associate:

» Add an existing Business Associate

To assign an existing Business Associate in the **Create contract and link to seismic** window:

1. Click the **Business Associates** tab.
2. Click **Add Existing**. An empty row appears in the grid.

Create contract and link to seismic					
Contract	Business Associates	Seismic	Media	Terms & Conditions	Geogr
+ Add existing + Add - Delete					
Business Associate	Contract Role	REMARK...	Source		

3. In the **Business Associate** column, select the business associate from the drop-down.
4. From the drop-select the **Contract Role**.
5. Fill in any other information as needed.

» Add a NEW Business Associate

To assign a new Business Associate in the **Create contract and link to seismic** window:

1. Click the **Business Associates** tab.
2. Click **Add**.

Create contract and link to seismic					
Contract	Business Associates	Seismic	Media	Terms & Conditions	Geogr
+ Add existing + Add - Delete					
Business Associate	Contract Role	REMARK...	Source		

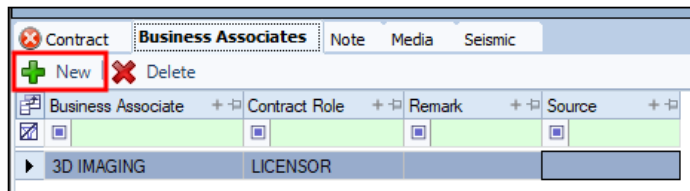
3. In the Create Business Associate window, fill in the fields then click **Save**.

Once you have added a Business Associate, continue on to another tab in the **Create contract and link to seismic** window.

During the process of [Adding a contract](#), you can assign a business associate to the contract.

To assign a business associate from the **Create contract and link to seismic** window:

1. Click the **Business Associates** tab.
2. Click **New**.



Contract Business Associates Note Media Seismic			
+ New - Delete			
Business Associate	Contract Role	Remark	Source
3D IMAGING	LICENSOR		

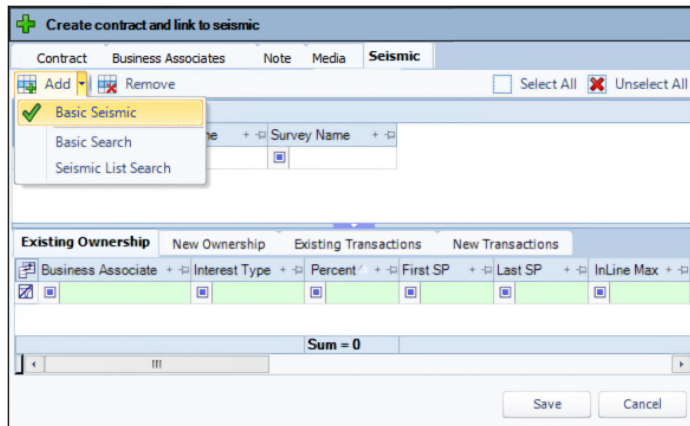
3. In the **Business Associate** column, select the business associate from the drop-down.
4. From the drop-select the **Contract Role**.
5. Enter a **Remark** and **Source**.
6. Continue to another tab.

4.0 Linking seismic to a new contract

When you "Add a contract" on page 9, you must link at least one seismic record.

To link seismic to a contract:

1. In the **Create contract and link to seismic** window, click the Seismic tab.
2. Click the down arrow next to **Add**, and select a search option.



3. In the search window, enter the search criteria and click **Search**. The results display in the upper panel with the associated detail.
4. View the results to identify the seismic to link. Use the lower tabs to view the ownership and transaction information.

102144491	2D	AL222_D-5	ALABAMA
Existing Ownership New Ownership Existing Transactions New Transactions			
Business Associate	Interest Type	Percent	First SP Last SP InLine Max
3D IMAGING	OPERATOR	20.00	

5. In the **Link** column, check the seismic to link to the contract.

Link	Seismic ID	Seismic Type	Line Name	Survey Name
☒	100621290	2D	C44_83-18	CN832D1001
☒	100621291	2D	C44_83-19	CN832D1001
☒	100621292	2D	C44_83-19R	CN832D1001
☒	100621293	2D	C44_83-2	CN832D1001
☒	100621294	2D	C44_83-21	CN832D1001
☒	100621295	2D	C44_83-21R	CN832D1001

6. To add information under the **Business Associates**, **Notes** or **Media** tabs, click the associated tab and continue with the relevant steps.

Or click **Save** and add the information later via the context menu.

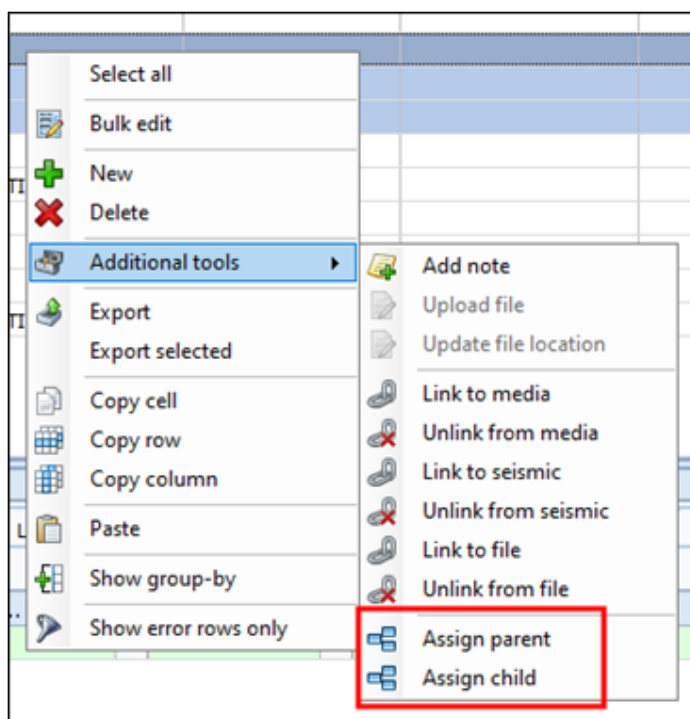
5.0 Assign a parent or child Contract

Select Version of EA Desktop:

The **Contract** module accommodates various project requirements with the ability to represent contract relationships. The relationship identifies a contract that is generated from another contract. The association between a parent and child contract is defined by your company workflow.

To assign a parent or child to one or more Contracts:

1. Select the target Contracts in the **Contract Properties** grid.
2. Right-click and select **Additional Tools>Assign Parent** or **Assign Child**.



3. In the new window, search for the Contract to assign as parent or child and click to select.
4. Click **Save**.

The assigned parent or child contract displays in the associated tab of **Related Records**.

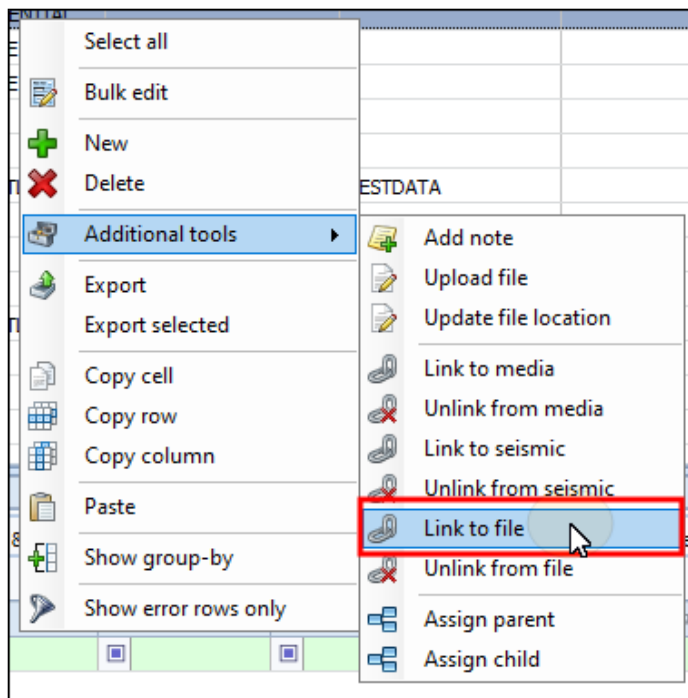


6.0 Link a File

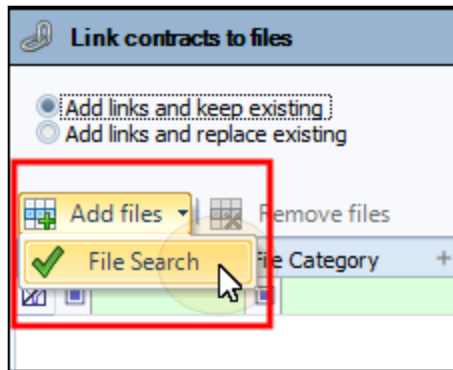
In the **Contract** module, use the **Contract Properties** grid to assign a parent file. When complete, the assigned files display in the **Files** tab of the **Related Records** panel.

To assign a File to one or more items:

1. Use one of the following methods to select the item(s) in the **Contract Properties** Panel:
 - » Click to select a single row.
 - » To select multiple consecutive rows, click and drag in the leader column in the grid.
 - » To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Select **Additional tools>Link to File**.



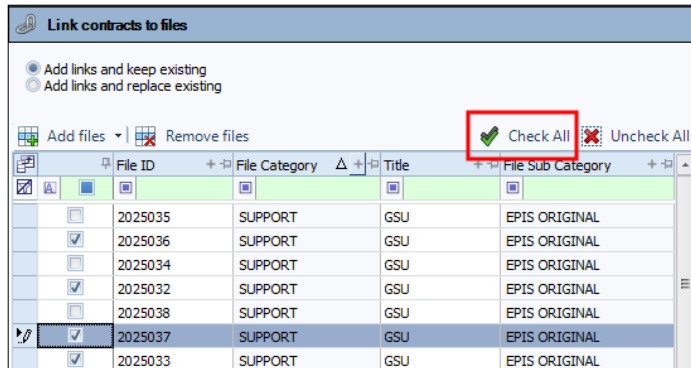
4. In the Link contracts to files window select File Search from the Add Files drop-down.



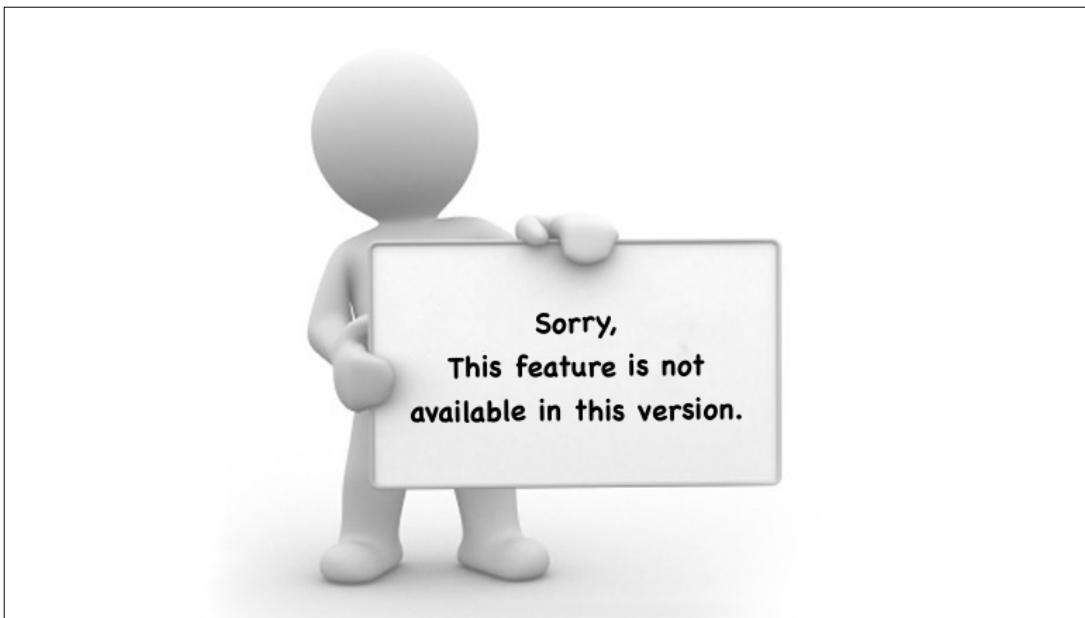
5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link contracts to files window.
6. From the results, select the check box next to the files to be linked.

**Tip:**

You can also select **Check All** to select all the files in the grid.



7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**. The selected files will link and appear under the Files tab in the **Related Records** panel.



7.0 Add Terms and Conditions

You can attach Terms and Conditions to a contract while it is being created, or to an existing contract from the related records tab.



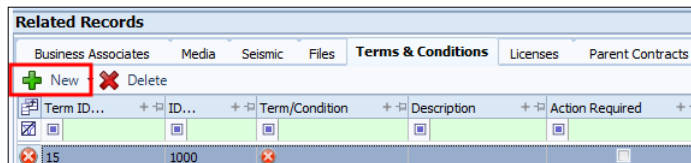
Note:

No matter where you attach them, the procedure is the same.

To add Terms and Conditions to a contract you can use one of 2 methods

7.1 Enter Terms and Conditions Manually

1. Select the **Terms and Conditions** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Click **New**. A Blank row will appear in the Grid.

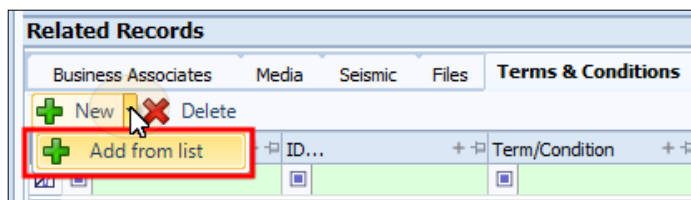


The TermID and ID are automatically generated.

3. For the Term/Condition field you can:
 - » Select a predefined Term from the drop-down OR
 - » Manually Enter a Term if it isn't on the list.
4. If the Term requires an Action to be taken, select the checkbox, then you can select the user to assign the action to in the Action Assigned User column.
5. Fill in the other columns as required.
6. In the toolbar, click **Save**.

7.2 Select Terms from a list:

1. Select the **Terms and Conditions** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Expand the New button and select **Add from list**.



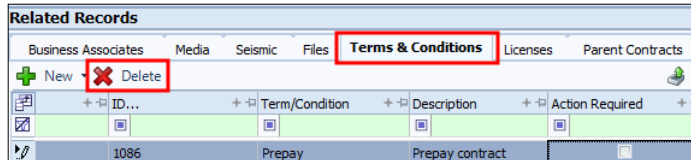
A window with a list of pre-defined terms opens.

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3. You can select either a single term from the list by clicking on the row, or select multiple terms by pressing Ctrl and clicking on the row of each term.
4. Click **OK**
5. The grid will populate with the selected terms. You can make changes as needed.
6. In the toolbar, click **Save**.

To delete Terms from a contract:

1. Select the Terms from the grid.
2. Click **Delete**.



3. From the confirmation dialogue that appears, click **Yes**.



8.0 Add Geographic Locations

Select Version of EA Desktop:

Just as when you "Add Terms and Conditions" on page 24, you can attach the Geographic Locations to a contract while it is being created, or to an existing contract from the related records tab.

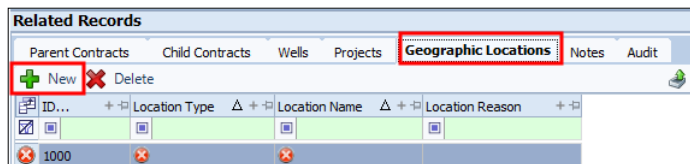


Note:

No matter where you attach them, the procedure is the same.

To add Geographic Locations to a contract:

1. Select the **Geographic Locations** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Click **New**. A Blank row will appear in the Grid.

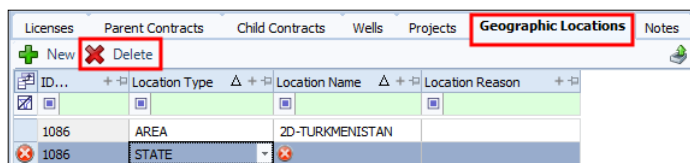


The ID is automatically generated.

3. There are 2 fields that are mandatory:
 - » **Location Type**: Select the contents from this field from the drop-down list.
 - » **Location Name**: Select from a drop-down list.
4. Fill in the other columns as required.
5. In the toolbar, click **Save**.

To delete a geographic location from a contract:

1. Select the Geographic Location or locations from the grid.
2. Click **Delete**.



3. From the confirmation dialogue that appears, click **Yes**.

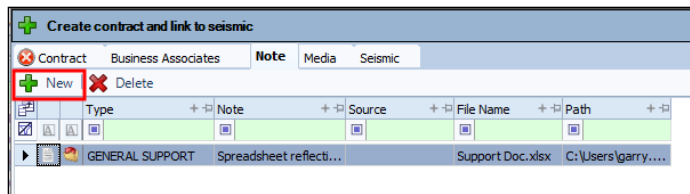


9.0 Add a note with a contract

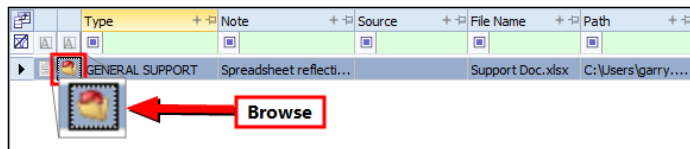
During the process of [Adding a contract](#), you can add a note with the contract.

To add a note from the **Create contract and link to seismic** window:

1. Click the **Notes** tab.
2. Click **New**. A new row adds to the grid for you to enter details.



3. To attach a file as a note, click **Browse** and navigate to the file on your device.



4. Select the file and click **Open**. The **File Name** and **Path** generates in the grid.
5. Select the **Type**.
6. Double-click the field in the **Note** column to manually enter a description.
7. Continue to another tab.

10.0 Add the contract media

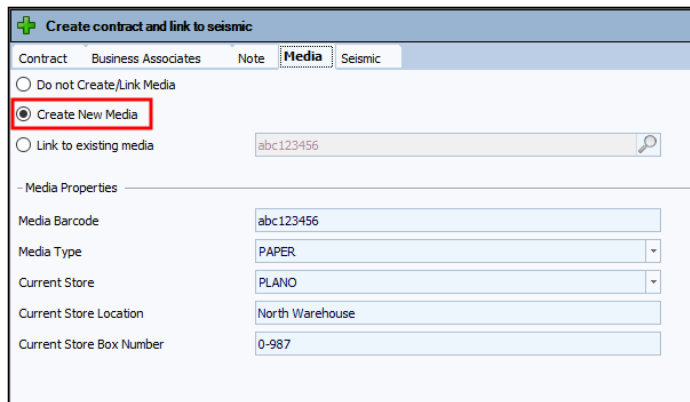
When [Adding a contract](#), you can link the physical contract, with the location, to the record.

The **Media** tab of the **Create contract and link to Seismic** window offers the following actions for media:

- » **Do not Create/Link Media**: add the contract without linking existing media or creating a new media.
- » **Create New Media**: create new media that auto-links to the contract.
- » **Link to Existing Media**: select existing media to link to the contract record.

To create and link to a new contract media...

1. With the **Create contract and link to Seismic** window open, click the **Media** tab.
2. Select **Create New Media**.



Create contract and link to seismic

Contract Business Associates Note **Media** Seismic

☐ Do not Create/Link Media

☒ **Create New Media**

☐ Link to existing media

- Media Properties

Media Barcode	abc123456
Media Type	PAPER
Current Store	PLANO
Current Store Location	North Warehouse
Current Store Box Number	0-987

3. Scan the barcode from your media, or enter manually.
4. Select the **Media Type**, **Current Store**, **Current Store Location** and **Current Box Number**, as applicable.
5. If complete, click **Save**. Alternatively, continue with another tab.

To link to existing contract media...

1. With the **Create contract and link to seismic** window open, click the **Media** tab.
2. Select **Link to Existing Media**.
3. Click **search** and select whether to search with the **Basic Media View** or the **Media Search** option.

Create contract and link to seismic

Contract Business Associates Note **Media** Seismic

☐ Do not Create/Link Media

☐ Create New Media

☒ Link to existing media

Media Properties

Media Barcode

Media Type

Current Store

Current Store Location

Current Store Box Number

Basic Media View

Media Search

4. Enter your search criteria.
5. Click **Search**.
6. In the results window, select the target media and click **OK**.

Select Item

Select an item in the grid and click OK to continue.

Media ID	Barcode	Type
3112184	3112184	PAPER
R203218	R203218	PAPER
R203614	R203614	PAPER
31787	\$2131787	PAPER
38803	S23803	PAPER
S23752	S23752	PAPER
S23753	S23753	PAPER
\$2131805	\$2131805	PAPER
S24172	S24172	PAPER

OK Cancel

The window closes and the media displays in the **Media Properties** of the **Create contract and link to seismic** window.

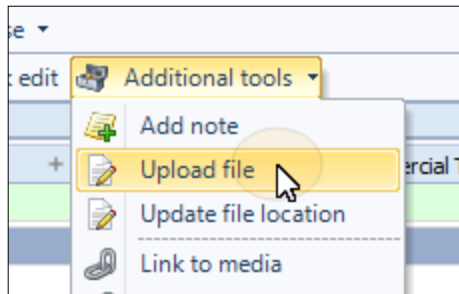
7. If complete, click **Save**. Alternatively, continue with another tab.

11.0 Upload a Contract file

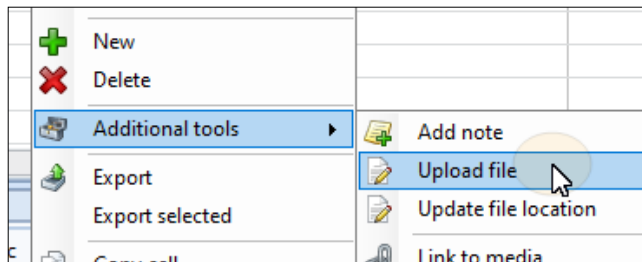
If you have the correct permissions, you can upload a contract file to a selected Contract.

To update the File location of a contract:

1. Select a contract in the Contract Properties grid.
2. You can use one of the following methods to update the file location:
 - » From the Toolbar, select **Additional Tools>Upload File**.



- » Right-click on a contract to open the context menu and select **Additional Tools>Upload File**



3. In the file explorer dialogue navigate and select the file to upload..
4. Click **Open**



12.0 Update a contract File Location

If you have the correct permissions, you can update the File Location and File Server fields of a selected Contract.

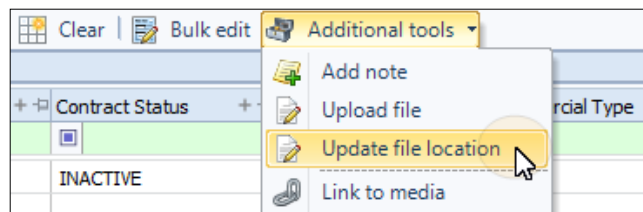


Warning:

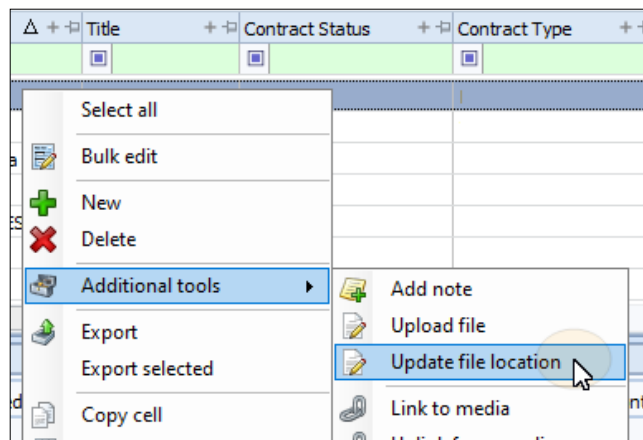
- » When you use this option it will remove the data of any contract file previously in existence.
- » When you update the file location, the file will not be able to be previewed.

To update the File location of a contract:

1. Select a contract in the Contract Properties grid.
2. You can use one of the following methods to update the file location:
 - » From the Toolbar, select **Additional Tools>Update File Location**



- » Right-click on a contract to open the context menu and select **Additional Tools>Update File Location**



3. In the Update File Contract Location dialogue, enter the new File Server and File Location fields.
4. Click **OK**

