



# User Reference Guide

## ENTITY MANAGEMENT Create and Maintain Organization Module 1

## **Table of Contents**

<b>COURSE OVERVIEW.....</b>	<b>3</b>
COURSE DESCRIPTION.....	3
PROCESS FLOW .....	3
<b>1 ORGANIZATION MANAGEMENT .....</b>	<b>3</b>
1.1 SEARCH ORGANIZATION .....	3
1.1.1 Key Points.....	3
1.1.2 Steps to Search for duplicates.....	4
1.2 CREATE ORGANIZATION (INCLUDING OPERATORS) .....	5
1.2.1 Key Points.....	5
1.2.2 Steps to Create an Organization .....	6
1.3 MAINTAIN AN ORGANIZATION (MODIFY ORGANIZATION OR OPERATOR) .....	13
1.3.1 Key Points.....	13
1.3.2 Steps to Modify (maintain) an Organization or Operator.....	14
1.4 MAINTAIN AN ORGANIZATION (MAKE ORGANIZATION OR OPERATOR INACTIVE) .....	15
1.4.1 Key Points.....	15
1.4.2 Steps to make an Organization inactive .....	16

## **COURSE OVERVIEW**

---

### **Course Description**

In this course you will learn how to create and maintain an Organization in the WellSTAR system as well as review Organization data submittals. The request to create or maintain an Organization can be initiated by email, service request, business process, etc. Maintaining an Organization can include modifying or making the Organization inactive.

### **Process Flow**

## **1 ORGANIZATION MANAGEMENT**

---

This process will be used for creating an Organization in the WellSTAR system. An Operator is a type of Organization.

Lesson objectives:

- Search for Organization (for duplication)
- Create Organization
- Modify an Organization
- Make an Organization Inactive
- Review an external data submittal

### **1.1 Search Organization**

#### **1.1.1 Key Points**

- Always conduct a search in WellSTAR before adding or modifying any Organization, Agent, User, etc.
- WellSTAR shows all DOGGR data, not just data for your District.

## Create and Maintain Organization

### Entities

Step 1

Step 2


Organizations People Workgroups

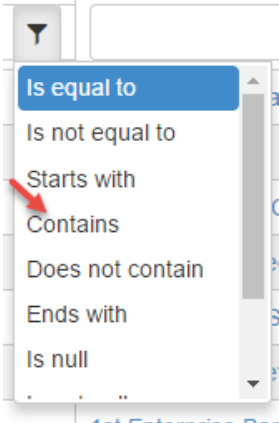
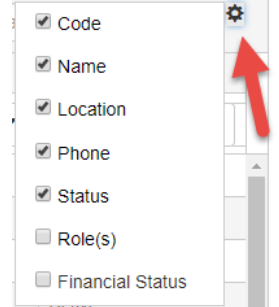
Advanced Filtering Actions Search

Code	Name ↑	Location	Phone	Status	Step 3
				Active	
A0150	ABA Energy Corporation	Sacramento, CA		Active	
10745	abalabi Energy Inc			Active	
A0450	Addison Oil & Gas, LLC		(713) 447-2171	Active	
10796	Agent Check	Sacramento, CA	(621) 621-6211	Active	
A0780	Alanmar Energy	Camarillo, CA		Active	
10787	Alloy Oil Company	Kern, CA	(661) 655-2149	Active	
10731	Alpha Petroleum	Sacramento, CA	(916) 555-3456	Active	
A2490	Ample Resources, Inc.	Los Angeles, CA		Active	

20 items per page Viewing 1 - 20 from 94 results

### 1.1.2 Steps to Search for duplicates

Step	Action	Required Fields
1.	From the home page hover over <b>Explore Data</b> and select <b>Entities</b> . Then ensure the <b>Organizations</b> tab is selected. Note: when the page loads the <b>Organizations</b> tab will be selected by default.	
2.	Click <b>Advanced Filtering</b>	
3.	Delete <b>Active</b> from the <b>Status</b> search criteria. This step ensures that all Organizations will be returned in the search results regardless of status. This is very important to prevent duplicates of Organizations that already exist.	
4.	A. When <b>Advanced Filtering</b> is enabled, enter the search criteria in the appropriate search field. B. Click the filter icon  and select the appropriate search condition:	

	<ul style="list-style-type: none"> <li>i. <b>Is equal to:</b> exact match.</li> <li>ii. <b>Is not equal to:</b> exclude exact match.</li> <li>iii. <b>Starts with:</b> exact match of beginning string.</li> <li>iv. <b>Contains:</b> exact match in any portion of search results (preferred).</li> <li>v. <b>Does not contain:</b> exclude exact match in any portion of search results.</li> <li>vi. <b>Ends with:</b> exact match of end of string.</li> <li>vii. <b>Is null</b></li> <li>viii. <b>Is not null</b></li> <li>ix. <b>Is empty</b></li> <li>x. <b>Is not empty</b></li> </ul>		
<p><b>Note:</b></p>	<p>The cog symbol can be expanded by clicking on it to reveal additional fields that can be added to the displayed table and searched.</p>		

## 1.2 Create Organization (including Operators)

### 1.2.1 Key Points

- A new Organization should only be created if the search results confirm there is not a preexisting entry for the Organization.
- Validation will be performed to ensure all required fields are complete.
- WellSTAR shows all DOGGR data, not just data for your district.

# Create and Maintain Organization

## Entities

Help

Organizations People Workgroups

The screenshot shows a table of organizations with columns for Code, Name, Primary Address, and Status. The 'Actions' dropdown menu is open, showing options: Add Organization, Export - Excel, and Export - PDF. A red arrow points to the 'Add Organization' option. The table contains 12 rows of organization data.

Code	Name	Primary Address	Status
A0150	ABA Energy Corporation	Sacramento, CA	Active
10745	abalabi Energy Inc		Active
A0450	Addison Oil & Gas, LLC		Active
10796	Agent Check	Sacramento, CA	Active
A0780	Alanmar Energy	Camarillo, CA	Active
10787	Alloy Oil Company	Kern, CA	Active
10731	Alpha Petroleum	Sacramento, CA	Active
A2490	Ample Resources, Inc.	Los Angeles, CA	Active
A2500	Anacapa Oil Corporation	Yuba City, CA	Active
N1223	Andrew L. Newkirk	Taft, CA	Active

### 1.2.2 Steps to Create an Organization

Step	Action	Required Fields
1.	Verify that the Organization does not already exist by searching (see lesson 1.1, Search Organization step 1).	
2.	Navigate to the Entity Management screen. Note: If you just searched for the Organization, you will already be on this screen	
3.	Use the <b>Actions</b> button to select <b>Add Organization</b> .	

# Create and Maintain Organization

Online Forms | Organization Questionnaire Hello Jeanette McCracken, Department of Conservation ▾

## Organization Questionnaire Help

Form Navigation

1. Form Information

Form Information

Please enter information below. \* Indicates required field

**Form Name**  
Organization Questionnaire

**Do you currently operate, or intend to operate oil and gas wells or facilities in California?**

Yes
  No

**Description \*** Step 5

**Step 6**

Step	Action	Required Fields
4.	Indicate that the Organization is an Operator by choosing the <b>Yes</b> radio dial for <b>Do you currently operate, or intend to operate oil and gas wells or facilities in California?</b> This form will be primarily completed by External Users, so the question uses the term “you”, answer <b>Yes</b> for any new Operator.	
5.	Enter any key identifying information in the <b>Description</b> box. This can be used to find the form in the future if you need to save and return to it later.	Description, California (Y/N)
6.	Click <b>Save and Continue</b> .	

## Organization Questionnaire

Help

Form ID: 706

Form Navigation

- 1. Form Information
- 2. Organization
- 3. People
- 4. Upload Documents
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Reviewer Fields
- 9. Review

### Organization

Enter information related to the Organization below. \* Indicates required field

**Type of Organization \***

**Name \***

**Short Name**

**Web Address**

**Role(s)**

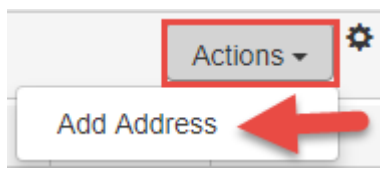
Organization Addresses ▶

Organization Phone Numbers ▶

Organization Email Addresses ▶

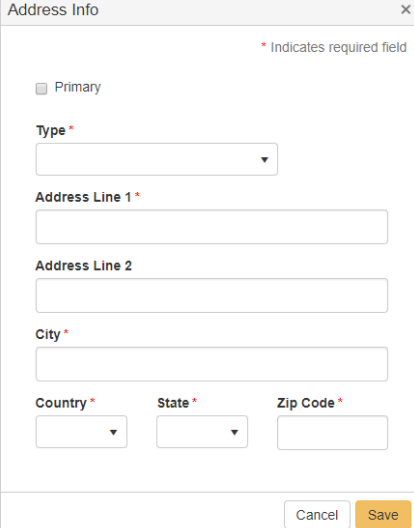
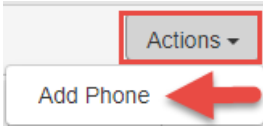
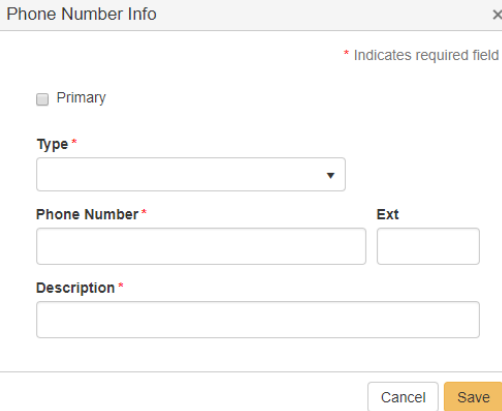
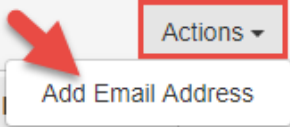
Associated Organizations ▶

Back Next Save

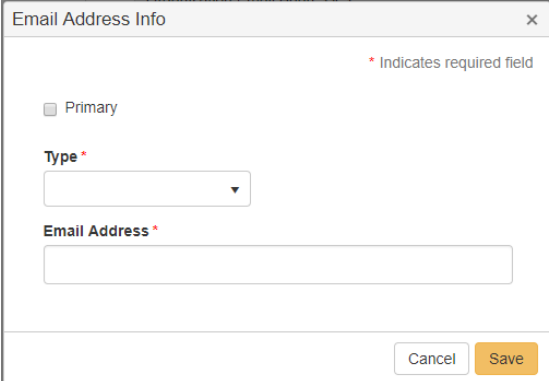
Step	Action	Required Fields
7.	Enter Organization information in <b>2. Organization</b> . Note: The Short Name field will autofill with the Organization name if the name is shorter than 40 characters. The <b>Short Name</b> is used for correspondence, to ensure that the <b>Name</b> does not become truncated when a label is created.	Type of Organization, Name
8.	Add an Address by expanding the <b>Organization Addresses</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Address</b> .	



## Create and Maintain Organization

9.	Add the Address information.		Type, Address Line 1, City, Country, State, Zip Code
10.	<p>Select <b>Save</b>.</p> <p>Note: Multiple addresses can be added to the Organization, but only one can be marked as primary.</p>		
11.	<p>Add a Phone Number by expanding the <b>Organization Phone Numbers</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Phone Number</b>.</p>		
12.	Add the <b>Phone Number Info</b> .		Type, Phone Number, Description
13.	<p>Select <b>Save</b>.</p> <p>Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>		
14.	<p>Add an Email Address by expanding the <b>Organization Email Addresses</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Email Address</b>.</p>		

## Create and Maintain Organization

15.	Add the <b>Email Address Info.</b>		Type, Email Address
16.	Select <b>Save</b> . Note: Multiple email addresses can be added to the Organization, but only one can be marked as primary.		
17.	Associate an existing Organization by expanding the <b>Associated Organizations</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Associated Organization</b> .		
18.	Use the Organization drop down to look up if an Organization exists in WellSTAR.		
19.	Choose a <b>Relationship Type</b> .	<ul style="list-style-type: none"> <li>Contractor</li> <li>SubContractor</li> <li>Merged With</li> <li>Subsidiary</li> </ul>	
20.	Select <b>Save</b> .		
21.	When data entry is complete for section <b>2. Organization</b> , select the <b>Save</b> button.		
22.	Select <b>Next</b> .		

### Organization Questionnaire

Form ID: 706
Help

**Form Navigation**

- 1. Form Information
- 2. Organization ✓
- 3. People
- 4. Upload Documents
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Reviewer Fields
- 9. Review

**People**

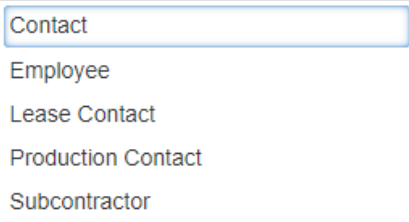
Enter Person information related to the Organization below. \* Indicates required field

People Add Person ▼

Name	WellSTAR User	Admin	Agent	Actions
Jenny Redd	Y	Y	N	Action ▼

Back
Next
Save

## Create and Maintain Organization

Step	Action	Required Fields
23.	<b>3: People:</b> To associate a person who already exists in WellSTAR: Click the <b>Add Person</b> button.	
24.	Click the <b>Person Already Exists in WellSTAR</b> button.	<b>Exists in WellSTAR:</b> Find Person, relationship type.
25.	Use the <b>Find Person</b> box to search for a person in the WellSTAR system.	
26.	Select a <b>Relationship Type</b> from the drop-down list. 	
27.	Set their <b>Relationship Attributes</b> . Note: Do not make a User an Admin for an Organization unless the Organization has requested that Relationship Attribute.	
28.	To create a new User associated to this organization view the Create and Maintain Person user guide lesson 1.2 for step by step instructions.	<b>Does not Exist in WellSTAR:</b> First Name, Last Name, Relationship
29.	Select <b>Save</b> .	
30.	Select <b>Next</b> .	

# Create and Maintain Organization

## Organization Questionnaire - Abalabi (10745)

Help

Form ID: 673

Form Navigation

1. Form Information
2. Organization
3. People
4. Upload Documents
5. Form Submit
6. Confirmation
7. Review Comments
8. Reviewer Fields
9. Review

### Upload Documents

Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

Uploaded Documents

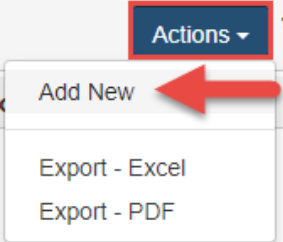
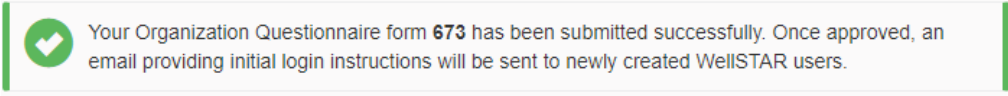
Advanced Filtering **Actions** Search

Upload D...	Uploade...	Type	ne	Size	Actions
<div style="position: relative;"> <div style="position: absolute; top: -20px; left: 50%; transform: translate(-50%, -50%); background: white; border: 1px solid #ccc; padding: 5px;"> <span style="font-size: 1.2em;">▼</span> Add New                             <ul style="list-style-type: none"> <li>Export - Excel</li> <li>Export - PDF</li> </ul> </div> </div>					

Back Next Save

Step	Action	Required Fields
31.	<b>4. Upload Documents:</b> Use the <b>Actions</b> drop down to select <b>Add New</b> .	
32.	Enter the required information.	Type, Relevant Date, Description, File Name.
33.	Navigate to the file to be uploaded.	

## Create and Maintain Organization

	Note: When filing on behalf of the Organization, the original documentation submitted by the Organization via paper mail, email, or other method should be uploaded during this step.	
34.	Select <b>Upload</b> .	
35.	Select <b>Save</b> .	
36.	Select <b>Next</b> .	
37.	<p><b>5. Form Submit</b></p> <p>To associate a form that already exists in the WellSTAR system to this form ( such as a bond information form):</p> <p>Use the <b>Actions</b> button to select <b>Add New</b>.</p>	
38.	Select the form to be associated.	
39.	Select <b>Save</b> .	
40.	To add a comment: Use the text box below the comments summary box.	
41.	Type your comment.	
42.	Check your content, spelling, and grammar.	
43.	<p>Select <b>Add</b></p> <p>Note: The comment will not be saved until you press Add. Comments cannot be edited or removed and are open to be viewed by all with access to WellSTAR. Ensure that your message is correct before selecting Add.</p>	
44.	<p>Check the “<b>I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete</b>” box. Your name will appear in the <b>submitter</b> box. If you do not check the box you cannot submit the form.</p> <p>Note: Your name will be in the submitter box, even when you are submitting on behalf of the Organization. For this reason, you should upload a copy of the email, or hard copy documentation that was sent to you prompting you to create the Organization.</p>	Acknowledgement
45.	<p>Preview your submission.</p> <p>Note: Previewing your submission will help ensure that you are comfortable with your acknowledgement made in the previous step prior to submitting the data.</p>	
46.	<p><b>6. Confirmation:</b> view the confirmation to ensure the submission was successful.</p> 	

### 1.3 Maintain an Organization (modify Organization or Operator)

#### 1.3.1 Key Points

- WellSTAR shows all DOGGR data, not just data for your District.

## Create and Maintain Organization

- All edits to the Organization are done through the Organization Questionnaire.

### Organization Detail

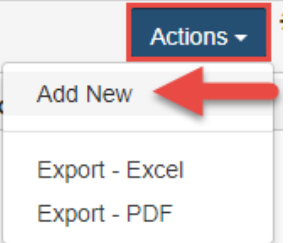
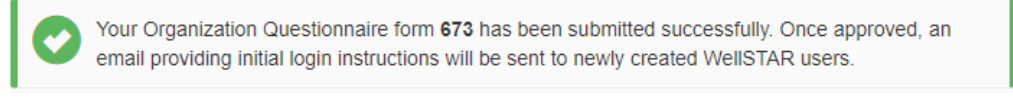
Help

ABA Energy Corporation
Summary ▾ Actions ▾

<b>Short Name</b> ABA Energy Corporation	<b>Code</b> A0150	<b>Status</b> Active
<b>Name</b> ABA Energy Corporation	<b>Organization Type</b> Corporation	<b>Primary Phone</b>
<b>Primary Address</b> 2625 Fair Oaks Boulevard, Suite 10 Sacramento, CA 95864	<b>Web Address</b>	<b>24-Hr Emergency Phone</b>
<b>Agent Address</b>	<b>Agent Name</b>	<b>Agent Email</b>
<b>Financial Status</b>		

### 1.3.2 Steps to Modify (maintain) an Organization or Operator

Step	Action	Required Fields
1.	<p>A. In the <b>Organizations</b> tab use the <b>Search</b> box to enter search criteria.</p> <p>B. Searches can be performed for more than one criteria at a time, or build upon search results by using the <b>Advanced Filtering</b> feature (For additional information on using advanced filtering return to 1.1 step 3 of this document.)</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <span>Advanced Filtering <sup>B</sup></span> <span style="background-color: #f0ad4e; padding: 2px 5px;">Actions ▾</span> <input style="width: 150px;" type="text" value="Search"/> <span style="float: right; color: red;"><sup>A</sup> ⚙</span> </div>	
2.	Select the record to be modified by clicking on the <b>Organization Name</b> .	
3.	Use the <b>Actions</b> button to select <b>Edit Details</b> . The Organization Questionnaire, prepopulated with the existing data will appear.	
4.	Navigate the form tabs on the right side to access the information to be edited.	
5.	Make edits as needed. Note: For section by section instructions for filling out the Organization Questionnaire form, see the Create Organization lesson above.	
6.	Upload supporting documentation if needed. Note: The original documentation submitted by the Organization via paper mail, email, or other method should be uploaded during this step.	
7.	<b>Save</b> edits.	

8.	<p><b>Navigate to 5.Form Submit</b>          To associate a form that already exists in the WellSTAR system to this form ( such as a bond information form):          Use the <b>Actions</b> button to select <b>Add New</b>.</p>		
9.	Select the form to be associated.		
10.	Select <b>Save</b> .		
11.	<p>To add a comment:          Use the text box below the comments summary box.</p>		
12.	Type your comment.		
13.	Check your content, spelling, and grammar.		
14.	<p>Select <b>Add</b>          Note: The comment will not be saved until you press Add. Comments cannot be edited or removed and are open to be viewed by all with access to WellSTAR. Ensure that your message is correct before selecting Add.</p>		
15.	<p>Check the “<b>I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete</b>” box. Your name will appear in the <b>submitter</b> box. If you do not check the box you cannot submit the form.          Note: Your name will be in the submitter box, even when you are submitting on behalf of the Organization. For this reason, you should upload a copy of the email, or hard copy documentation that was sent to you prompting you to modify the Organization</p>		Acknowledgement
16.	<p>Preview your submission.          Note: Previewing your submission will help ensure that you are comfortable with your acknowledgement made in the previous step prior to submitting the data.</p>		
17.	<p><b>6. Confirmation:</b> view the confirmation to ensure the submission was successful.</p> 		

## 1.4 Maintain an Organization (Make Organization or Operator Inactive)

### 1.4.1 Key Points

- An Organization cannot be made **Inactive** if they have any active, idle, or new wells associated to them, or if they have an active bond associated to them.
- An Organization Questionnaire can be generated for this activity; it does not have to be part of a review of a previous Organization Questionnaire form.
- This action does not trigger a review process, as it is part of the review process.

## Create and Maintain Organization

- Organizations cannot edit any of the review sections or fields.

Form ID: 536

**Form Navigation**

1. Form Information
2. Organization ✓
3. People
4. Upload Documents
5. Form Submit
6. Confirmation
7. Review Comments
8. Reviewer Fields ←
9. Review

**Reviewer Fields**

Enter information related to the Organization below. \* Indicates required field

**Organization Status \***

Active
▼
←

**Financial Status \***

▼

Back Next Save

### 1.4.2 Steps to make an Organization inactive

Step	Action	Required Fields
1.	<p>A. In the <b>Organizations</b> tab use the <b>Search</b> box enter search criteria.</p> <p>B. Searches can be performed for more than one criteria at a time, or build upon search results by using the <b>Advanced Filtering</b> feature: (for additional information on using advanced filtering return to 1.1 step 4 of this document.)</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <span style="font-size: 1.2em;">▼</span> <span style="font-weight: bold; color: #0056b3;">Advanced Filtering</span> <span style="font-size: 1.2em; color: red; font-weight: bold;">B</span> <span style="background-color: #0056b3; color: white; padding: 2px 10px; margin-left: 10px;">Actions</span> <span style="border: 1px solid #ccc; padding: 2px 20px; margin-left: 10px;">Search</span> <span style="font-size: 1.2em; color: red; font-weight: bold;">A</span> <span style="font-size: 1.2em;">⚙️</span> </div>	
2.	Select the Organization to be made Inactive.	
3.	Use the <b>Actions</b> button to select <b>Edit Detail</b> .	
4.	In the <b>8. Reviewer Fields</b> Tab change the <b>Organization Status</b> or <b>Financial Status</b> as needed.	
5.	Select <b>Save</b> .	