



User Reference Guide

ENTITY MANAGEMENT Create and Maintain Person Module 2

Table of Contents

COURSE OVERVIEW.....	3
COURSE DESCRIPTION.....	3
1 CREATE AND MAINTAIN PERSON.....	3
1.1 SEARCH FOR AN INDIVIDUAL OR USER.....	3
1.1.1 Key Points.....	3
1.1.2 Steps to search for an Individual or User	4
1.2 CREATE PERSON IN WELLSTAR	5
1.2.1 Key Points.....	5
1.2.2 Steps to create a Person	6
1.3 MODIFY INDIVIDUAL OR USER.....	10
1.3.1 Key Points.....	10
1.3.2 Option One: Steps to modify Person information	11
1.3.3 Option two: Steps to modify Person information	13
1.4 MAKE INDIVIDUAL OR USER INACTIVE	16
1.4.1 Key Points.....	16
1.4.2 Steps to Make Individual or User Inactive.....	17

COURSE OVERVIEW

Course Description

This process includes creating and maintaining people in WellSTAR. This includes Individuals and Users. An agent can also be designated using this process. Changes to the Security Assignments are not covered in this User Guide, but can be found in the WellSTAR for Administrators User guide.

1 CREATE AND MAINTAIN PERSON

This process will be used for creating, modifying and making Individuals or Users inactive. This process will be used to create People on behalf of the Organizations. This process is not used to create an Internal User. All Internal User accounts must be set up through the service desk. Instructions for adding a person as an Internal User are detailed in the WellSTAR For Administrators User guide.

Lesson Objectives:

- Search for a Person
- Create Person
- Modify Person
- Make person inactive

1.1 Search for an Individual or User

1.1.1 Key Points

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

Create and Maintain Person

Entities Help

Organizations **People** Workgroups


Step 1 Step 2

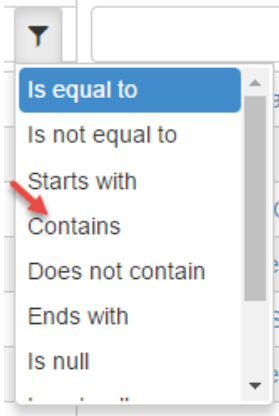
Advanced Filtering Actions Search

Name ↑	Primary Phone	WellSTAR User	Role(s)	Status Step 3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active
Aasia Newsome		Y		Active
Agent Form Test Test	(916) 666-6666	Y	Engineer	Active
Aj Ajduah		Y		Active
Ajay Bhat		Y		Active
Albus Dumbledore	(267) 578-1248	Y	Contact	Active
Amanda Parks		Y		Active
Anna Hinh		Y		Active
Annie Richardson		Y		Active

1 2 3 4 5 6 20 items per page Viewing 1 - 20 from 112 results

1.1.2 Steps to search for an Individual or User

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

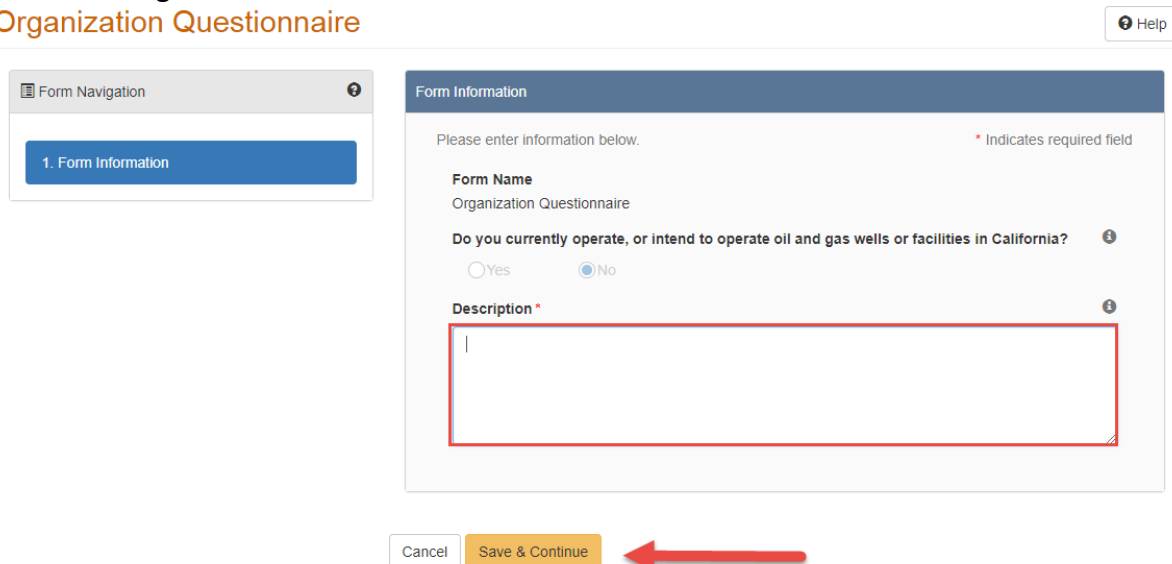
<ul style="list-style-type: none">i. Is equal to: exact matchii. Is not equal: exclude exact matchiii. Starts with: exact match of beginning stringiv. Contains: exact match in any portion of search results (preferred)v. Does not contain: exclude exact match in any portion of search resultsvi. Ends with: exact match of end of stringvii. Is nullviii. Is not nullix. Is emptyx. Is not empty	
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1.2 Create Person in WellSTAR

1.2.1 Key Points

- A person is either an Individual (someone without WellSTAR access, but for whom there is contact information in the System), or a User (someone with access to WellSTAR and some level of Security Assignment).
- A Person is added through the Organization Questionnaire Section 3. People.
- This process will rarely need to be completed by DOGGR staff as Organizations can add people to their Organization through the Organization Questionnaire.
- This process can be used to associate a person who already existing in WellSTAR to an Organization.

Organization Questionnaire



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?

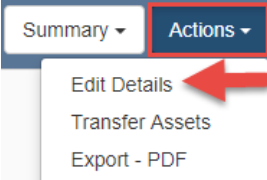
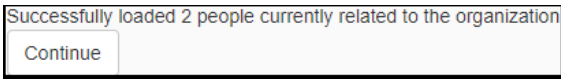
Yes No

Description *

Cancel Save & Continue

Create and Maintain Person

1.2.2 Steps to create a Person

Step	Action	Required Fields
1.	Verify the Individual or User does not already exist by searching (see the Search lesson at the beginning of this user guide).	
2.	Look up the Organization the Person is to be added to. If the Organization does not exist create it using the steps outlined in the Create and Maintain Organization User Guide.	
3.	From the Operator detail page select the Actions button and Choose Edit Details . 	
4.	Section 1. Form Information , Create a Description .	Description
5.	Select Save and Continue .	
6.	Select section 3. People . The total number of people included in the Organization will be displayed. 	
7.	Select Continue .	

Organization Questionnaire - ABA Energy Corporation (A0150)

Help

Form ID: 533

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
A Irani	N	N	N	Action
Melissa Irani	N	N	N	Action
A. Irani	N	N	N	Action
A. Irani	N	N	N	Action

Back Next Save

Create and Maintain Person

Step	Action	Required Fields
8.	The People associated to this organization will be displayed in the People window. Click the Add Person button in the top right of the Person Window.	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 717

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

Person Info

* Indicates required field

Person Already Exists in WellSTAR
 Person Does Not Exist in WellSTAR

First Name *
Middle Name
Last Name *

Addresses ▶

Phone Numbers ▶

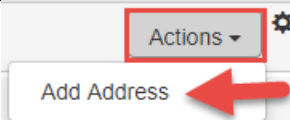
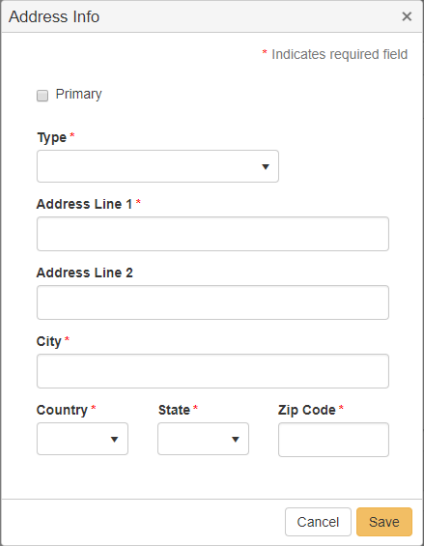
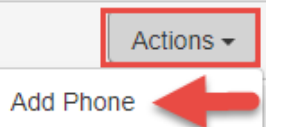
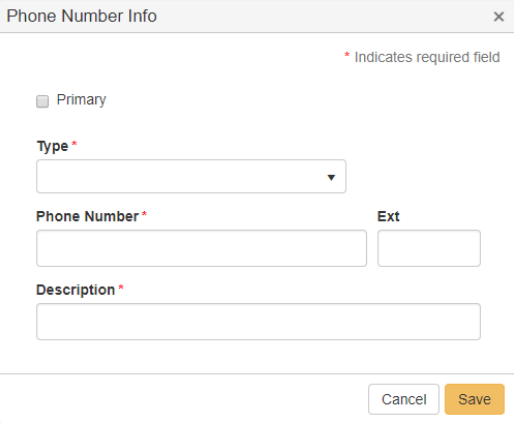
Email

Relationship Types *
Relationship Attributes
 WellSTAR User
 Admin

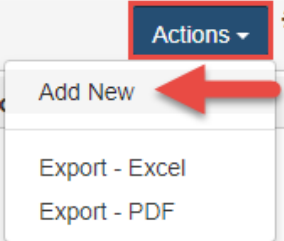
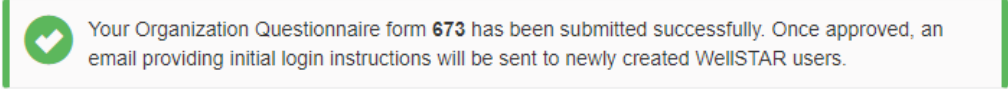
Role(s)

9.	<p>To create a new Person, change the radio dial to Person Does Not Exist in WellSTAR.</p> <p> <input type="radio"/> Person Already Exists in WellSTAR <input checked="" type="radio"/> Person Does Not Exist in WellSTAR </p> <p>Note: To add a person who already exists in WellSTAR, select the Person Already Exists in WellSTAR option and use the Find person box to search for the person.</p>	
10.	Enter the Person information.	First Name, Last Name,

Create and Maintain Person

	<p>Note: An email address must be entered for new Users. When the User is created WellSTAR will send an email to the new User with instructions on how to access the WellSTAR system.</p>	<p>If User: Email</p>
<p>11.</p>	<p>Add an Address by expanding the Addresses section using the arrow symbol ▼ and then using the Actions button to select Add Address.</p>	
<p>12.</p>	<p>Add the Address information.</p>	<p>Type, Address Line 1, City, Country, State, Zip Code</p> 
<p>13.</p>	<p>Select Save. Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.</p>	
<p>14.</p>	<p>Add a Phone Number by expanding the Phone Numbers section using the arrow symbol ▼ and then using the Actions button to select Add Phone Number</p>	
<p>15.</p>	<p>Add the phone contact information.</p>	<p>Type, Phone Number, Description</p> 
<p>16.</p>	<p>Select Save. Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>	

Create and Maintain Person

17.	Assign the new person a Relationship Type: Contact, Employee, Lease Contact, Production Contact, or Subcontractor.	
18.	If the new Person is a User, use the Relationship Attributes check boxes to select WellSTAR User . The new person may be given more than one Relationship Attributes by checking the box for more than one selection.	
19.	When data entry is complete click the Save button.	
20.	Navigate to section 5. Form Submit To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the Actions button to select Add New .	
21.	Select the form to be associated.	
22.	Select Save	
23.	To add a comment: Use the text box below the comments summary box.	
24.	Type your comment.	
25.	Check your content, spelling, and grammar.	
26.	Select Add 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.	
27.	Check the “I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete” box. Your name will appear in the submitter 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 create the Organization.	Acknowledgment
28.	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.	
29.	6: Confirmation: view the confirmation to ensure the submission was successful. 	
30.	WellSTAR system sends email to new User Email Text: Welcome to WellSTAR. A request was received to create a WellSTAR login for you. Please use following username and password when logging into the system. You will then be prompted to change your password.	

Create and Maintain Person

	URL: www.WellSTAR.com Username: {username} Password: {tempPassword} If you did not make this request please contact the WellSTAR Administrator at (916) 555-1212.	
--	--	--

1.3 Modify Individual or User

1.3.1 Key Points

- There are two ways to edit a Person in WellSTAR. A Person can be looked up and edited directly from their Profile page (Option One) or can be edited as part of the Organization (Option Two). A Person's relationship with that Organization can only be changed through Option Two.
- External Users can have their organization admin make changes to their profile, so this process will be used rarely by DOGGR Staff.
- Modifying Person information for all user, other than the Agent, page does not trigger the review process. If the Agent's information is updated, an internal review task is triggered.

Create and Maintain Person

1.3.2 Option One: Steps to modify Person information

Note: you cannot associate or disassociate a person from an Organization or alter their relationship with that Organization through this process. To alter Organization related Person information proceed to Option Two below in this user guide.

Person Detail Edit Help

Jeanette McCracken Actions ▾

First Name *	Middle Name	Last Name *
<input type="text" value="Jeanette"/>	<input type="text"/>	<input type="text" value="McCracken"/>
Email	Status	WellSTAR User
<input type="text" value="Jeanette.mccracken@conservation.ca.gov"/>	<input type="text" value="Active"/>	<input type="text" value="Yes"/>

Associated Addresses Add Address ▶

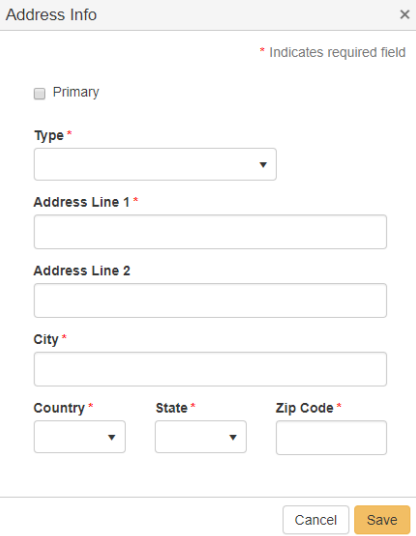
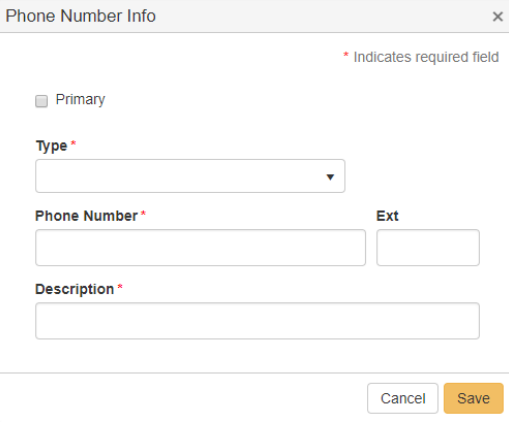

Associated Phone Numbers Add Phone Number ▶

Associated Roles Add Role ▶

Associated Organizations ▶

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	
2.	Select a record to modify by clicking on the Name .	
3.	Use the Actions button to select Edit Details .	
4.	Edit any of the heading information by clicking the box of the field to be edited.	
5.	Add an Address by selecting the Add Address button.	

Create and Maintain Person

6.	Add the Address information.		Type, Address line 1, City, Country, State, Zip Code
7.	<p>Select Save.</p> <p>Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.</p>		
8.	Add a phone number by selecting the Add Phone Number button.		
9.	Add the phone number information		Type, Phone Number, Description
10.	<p>Select Save.</p> <p>Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>		
11.	Add an associated role by selecting the Add Role button.		
12.	Add the Role information.		Role

Create and Maintain Person

13.	Select Save . Note: A person may have many roles. These roles are not related to the Security Assignments for the WellSTAR system.	
14.	Select Save on the Person Detail Edit page to save and exit editing.	

1.3.3 Option two: Steps to modify Person information

Note: Through this process the relationship between a person and an Organization can be updated.

Organization Questionnaire - ABA Energy Corporation (A0150)

Help

Form ID: 534

Form Navigation

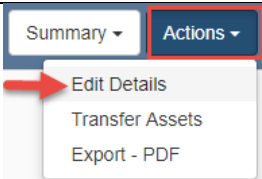
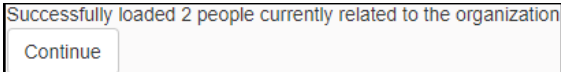
1. Form Information
2. Organization ✓
3. People ←
4. Upload Documents
5. Form Submit
6. Confirmation
7. Review Comments
8. Reviewer Fields
9. Review

People

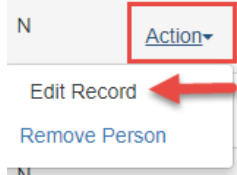
Enter Person information related to the Organization below. * Indicates required field

People * Add Person ▾

Name	WellSTAR User	Admin	Agent	Actions
A Irani	N	N	N	Action ▾ ←
Melissa Irani	N	N		<div style="border: 1px solid red; padding: 2px; display: inline-block;">Edit Record</div> Remove Person
A. Irani	N	N	N	Action ▾
A. Irani	N	N	N	Action ▾

Step	Action	Required Fields
1.	Search for the Organization associated with the Person to be edited.	
2.	Select the Organization record by clicking on the Name .	
3.	Use the Actions button to select Edit Details . 	
4.	Open section 3. People The total number of people included in the Organization will be displayed. Select Continue below this statement. 	

Create and Maintain Person

5.	<p>The People associated to this organization will be displayed in the People window. Click the Action link right of the name of the person to be edited. From the actions menu, you may Edit Record or Remove Person. Note: Removing a person does not delete them from WellSTAR, it sets their association to this Organization to Inactive.</p>	
6.	<p>Select Edit Record.</p> 	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 717

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

Person Info

* Indicates required field

Person Already Exists in WellSTAR
 Person Does Not Exist in WellSTAR

First Name *
Middle Name
Last Name *

Addresses ▶

Phone Numbers ▶

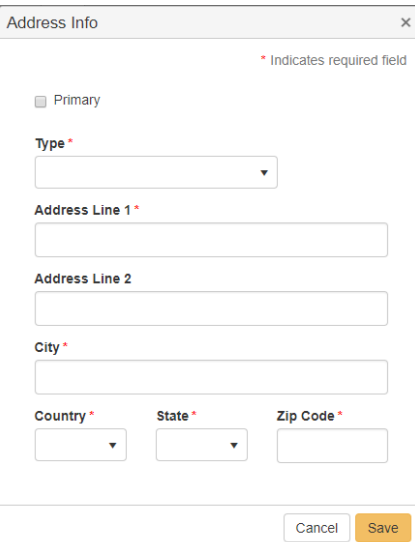
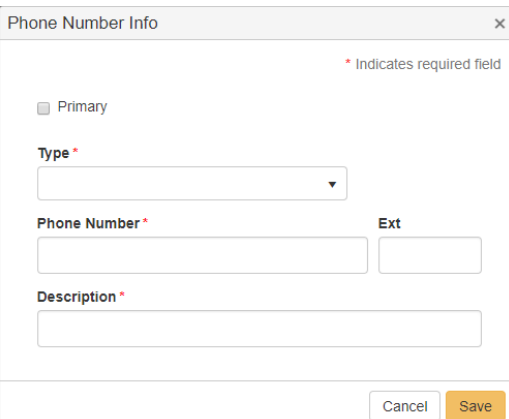
Email

Relationship Types *
Relationship Attributes
 WellSTAR User
 Admin

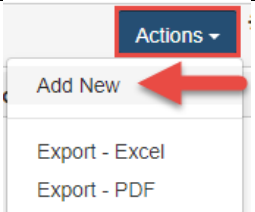
Role(s)

7.	<p>Edit any of the heading information by clicking the box of the field to be edited.</p>	
8.	<p>Add an Address by selecting the Add Address button.</p>	

Create and Maintain Person

<p>9.</p>	<p>Add the Address information.</p>		<p>Type, Address line 1, City, Country, State, Zip Code</p>
<p>10.</p>	<p>Select Save. Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.</p>		
<p>11.</p>	<p>Add a phone number by selecting the Add Phone Number button.</p>		
<p>12.</p>	<p>Add the phone number information.</p>		<p>Type, Phone Number, Description</p>
<p>13.</p>	<p>Select Save. Note: Multiple phone numbers can be added to the Person, but only one can be marked as primary.</p>		
<p>14.</p>	<p>To associate a relationship type, click in the Relationship Type box and select from the drop-down menu.</p>		
<p>15.</p>	<p>Change Relationship Attributes as needed by checking or unchecking the boxes. Note: This includes making a person the Agent of the Organization.</p>		
<p>16.</p>	<p>To associate a role, click in the Roles box and select from the drop-down menu.</p>		
<p>17.</p>	<p>Select Save on the 3. People Section of the form.</p>		

Create and Maintain Person

18.	<p>Navigate to section 5.Form Submit To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the Actions button to select Add New.</p>		
19.	Select the form to be associated.		
20.	Select Save		
21.	To add a comment: Use the text box below the comments summary box.		
22.	Type your comment.		
23.	Check your content, spelling, and grammar.		
24.	<p>Select Add 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>		
25.	<p>Check the “I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete” box. Your name will appear in the submitter 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 create the Organization.</p>		Acknowledgement
26.	<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>		
27.	6: Confirmation: view the confirmation to ensure the submission was successful.		

1.4 Make Individual or User Inactive

1.4.1 Key Points

- When made inactive, Individuals and Users are still associated to the Organization in the system, but are not active. No information is deleted.
- WellSTAR shows all DOGGR data, not just data for your District.

1.4.2 Steps to Make Individual or User Inactive

Home | Entities | Ariel Pruitt

Person Detail

Help

Ariel Pruitt Summary Actions

User Information
Ariel Pruitt

Phone

Email
Ariel.pruitt@conservation.ca.gov

Status
Active

WellSTAR User
Yes

Associated Addresses

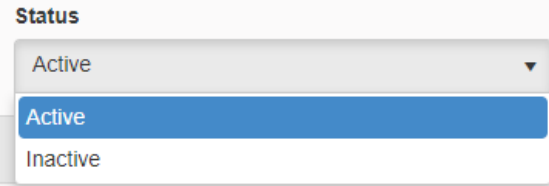
Associated Phone Numbers

Associated Roles

Associated Organizations

Associated Workgroups

Comments

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	
2.	Select a Person to become inactive by clicking on the Name .	
3.	Use the Actions button to select Edit Details .	
4.	Set the Status to Inactive . 	
5.	Click the Save button to save changes and close out of editing.	