

Entity Management Quick Reference Guide



WellSTAR Home Screen

Task Name	Organization	Status	Workgroup	Assigned To	Due Date	Actions
Approv... Daily Agent change request	Andrew L. Newkirk	Not Started	Agent Change Review			Actions-
Approv... Daily Agent change request	Laguna County Sanitation District	Not Started	Agent Change Review			Actions-
Approv... Daily Agent change request	Greco Oil & Gas, Inc.	Not Started	Agent Change Review			Actions-
Approv... Daily Agent change request	Andrew L. Newkirk	Not Started	Agent Change Review			Actions-
District Office 2 Bond Review	Chase Production Co.	Not Started	Bond Review - Southern District		08/03/2017	Actions-
District Office 2 Bond Review	Chase Production Co.	Not Started	Bond Review -		08/03/2017	Actions-

Tips

Search WellSTAR:

WellSTAR often has more than one way to perform the same action, especially searching. A User can search for an entity:

- 1) In the top search bar, set to the topic you wish to search.
- 2) In the basic search bar from the Entities page.
- 3) Using the advanced filtering functionality from the Entities page.

TIP: Always search before creating new Entities.

Comments:

Comments are public and cannot be changed once saved. Always proof read before saving!

Event Log:

An event log can be viewed from the Entity Details page by changing the view from Summary to Events.

Validation:

WellSTAR only performs specific predefined validations, many possible errors may not be caught by validation. Therefore, all entries should be double checked before they are saved to prevent data errors.

WellSTAR Facts:

- 1) Unique Organization codes are generated by WellSTAR.
- 2) Search results may be exported from WellSTAR as either Excel file or PDF by using the Actions button.
- 3) WellSTAR shows all DOGGR data, not just data for your District.

Create an Organization

- From the **Explore Data** tab, select **Entities**.
- Search the **Organization** tab to prevent duplicates.
- Use the **Actions** button to **Add Organization**.
- Enter information for each section as needed.

Organization may be edited

- Use the **Actions** button to select **Edit Detail**.
- Use the **Form Navigation** to edit data.

Make an Organization Inactive

- Set **Status** to **Inactive** from the form section **8. Reviewer fields**.



An Organization can be made inactive only if there are no active bonds or active wells associated with that Organization.

Create a Person

- From the **Explore Data** tab, select **Entities**.
- Search the **People** tab to prevent duplicates.
- Look up the Organization to which the person will be associated.
- Select the Organization and use the **Actions** button to **Edit Details**.
- Use the **Form Navigation** to access form section **3. People**.
- Click **Continue**, then select the **Add Person** button.
- Indicate that the **Person Does not Exist in WellSTAR**.
- Enter information and **Save**.

People may be edited: Option one

- Access Person Detail page, and use the **Actions** button to select **Edit**.
- User **Status** can only be edited from the User's Person Detail page.

People may be edited: Option two

- Access Organization Questionnaire by selecting **Actions** from the Organization's Detail Page and selecting **Edit Record**.
- Locate the person record on section **3. People**.
- People can only be removed from an organization through form section **3. People**.

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Search Tip:

By default WellSTAR filters organization and people searches for active entities. To search for entities with a non-active status use advanced filtering.

Code	Name ↑	Location	Phone	Status	Step 3
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	

Trouble shooting: Security Assignments

Check Security Assignments first when having difficulties performing actions in WellSTAR. The Security Assignment limits what actions a User can perform. A change to Security Assignments can be requested through the Service Desk.

Workgroups

Workgroups are Internal User only, meaning that External Users cannot create, view, or be part of a Workgroup. Workgroups are used to help with workflow for Internal processes. The WellSTAR system can generate tasks and assign them to the appropriate Workgroup.

Upload Documents:

When a document is submitted to request an entity change made on behalf of an Organization, be sure to upload the original document submitted by the Organization (section 4. Upload Documents).

Task Generation: WellSTAR generates a review task if the information changed in the Organization Questionnaire requires review. Changes to the Agent information always require a review and approval by internal DOGGR staff.

Online Help

Click the Help icon to access online help for each page.



WellSTAR Advanced Filtering

Advanced filtering: Commonly used functions

- When Advanced Filtering is enabled, enter the search criteria in the appropriate search field.
- Click the filter icon and select the appropriate search condition:
 - Is equal to:** exact match
 - Is not equal to:** exclude exact match
 - Starts with:** exact match of beginning string
 - Contains:** exact match in any portion of search results (preferred)
 - Does not contain:** exclude exact match in any portion of search results
 - Ends with:** exact match of end of string

