

# Facility Management

## Quick Reference Guide



### Start New or Edit an Existing Facility:

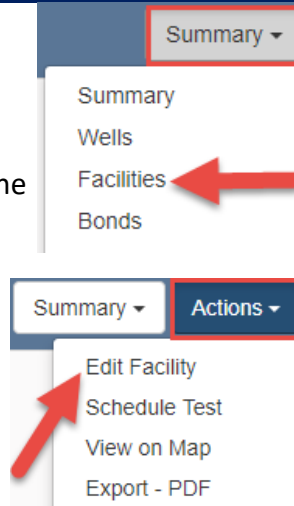
1. Hover over **Explore Data** and select **Entities**.
2. Search for the Operator of the facility in the **Organizations** tab.
3. Select the Operator.
4. From the **Organization Detail** page change the view from **Summary** to **Facilities**.

#### Create a new facility:

5. Use the **Action** button to select **Create New Facility**.

#### Edit an existing facility:

6. Search for the existing facility.
7. Click the blue facility **ID** to be taken to the Facility Details page.
8. Use the **Actions** button to select **Edit Facility**.



### Types of Facilities

1. **Setting:** May contain tanks and or vessels.
2. **Sump**
3. **Pipeline:** contains at least one segment. Pipeline segments have at least two nodes one for start and one for end location, unless the segment is a standalone plant. Other nodes may be added along the segment..
4. **Facility Group**
  - A facility designed to connect multiple facilities through the **Facility Association** section of the Facility Information Form.

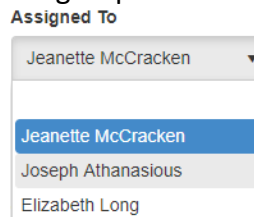
### Review Data Submittals

1. From **My Tasks** select the blue **Review Facility Submission** task.

Northern District Review Facility Submission

**NOTE** The task name will be different for each review group.

2. Click the **Edit** button.
3. Set the **Assigned To** box to your name from the drop down list.
4. **Status** will automatically change to **In Progress**.



5. Click **Save**.
6. Select the blue **Form** hyperlink to view the form.

Form  
OFD007 - Facility Management

7. Review the data submittal.
8. If needed add comments to Section **13. Review comments**.
9. In Section **14. Review** select the task claimed in step 1. (the name of the task will match the name from step 1).
10. Set the **Status** of the review to **Approve, Deny, Return, or On Hold**.
11. Return to **Task Detail** page. (It should still be open in a separate tab, but if not find it on the **My Tasks** page by searching for tasks assigned to you.
12. Click the **Edit** button.
13. Change **Status** to **Completed**.
14. Click **Save**.

**NOTE** Sections below **Component Association** have 2 different section numbers depending on the facility type. The instructions above assume a setting facility type.

### Facility Plans:

- Plans are uploaded via the Plan Submission form.
- When approved Plans can be viewed in the document section of the Facility Detail page.
- Well Stimulation and Underground Gas storage use the Plan Submission form as well.
- Facility management plan Types: Lease Restoration Plan, Pipeline Management Plan, and Spill contingency plan.

## Facility Information Form section guide:

Form Section	Key Information
<b>1. Form Information</b>	<ul style="list-style-type: none"> <li>•Facility Type (Setting, Sump, Pipeline, Group)</li> <li>•Description (a short description of the form, i.e. facility name and Operator).</li> </ul>
<b>2. Operator Information</b>	<ul style="list-style-type: none"> <li>•Will be pre-populated if the form was opened from the Operators Detail page.</li> <li>•Adding a contact here makes that contact the contact for this form, but does not add them as a contact for the company.</li> </ul>
<b>3. Facility Attributes</b>	<ul style="list-style-type: none"> <li>•Facility Contact (select from Organization's staff only)</li> <li>•Location Information: Facility Name, Field, PLSS, etc.</li> <li>•Location Attributes: Purpose, Offshore? Urban? Fresh water? Environmentally Sensitive?</li> <li>•Facility Information: changes for each of the four facility types. Build Date, Status, containment, etc.</li> <li>•Equipment: Add equipment for this facility.</li> </ul>
<b>4. Lease Association</b>	<ul style="list-style-type: none"> <li>•Associate or remove lease from the facility. Only one lease per Facility</li> </ul>
<b>5. Component Association</b>	<ul style="list-style-type: none"> <li>•Setting: Add a tank or vessel.</li> <li>•Pipeline: add a segment and nodes within that segment.</li> </ul>
<b>6. Facility Association</b> Key section for Facility Group facility type	<ul style="list-style-type: none"> <li>•Associate or remove association of one facility to another.</li> <li>•A facility group can be used to associate many individual facilities without associating each one individually.</li> </ul>
<b>7. Bond Association</b>	<ul style="list-style-type: none"> <li>•Lists all the bonds Associated with this Operator. Can be linked to facility.</li> </ul>
<b>8. Plan Association</b>	<ul style="list-style-type: none"> <li>•Lists all plans associated with this Operator.</li> <li>•Must be uploaded through the Plan Submission form.</li> </ul>
<b>9. Well Association</b>	<ul style="list-style-type: none"> <li>•Lists wells associated with this Operator. Can be linked to facility. Is used by the system to determine leases served.</li> </ul>
<b>10. Document Upload</b>	<ul style="list-style-type: none"> <li>•Facility plans should <b>not</b> be uploaded here. Use Plan Submit form. Any other documents can be uploaded here.</li> </ul>
<b>11. Form Submit</b>	<ul style="list-style-type: none"> <li>•Associate other forms, add comments, check acknowledgment.</li> </ul>
<b>12. Confirmation</b>	<ul style="list-style-type: none"> <li>•Confirmation that submittal was successful (or not).</li> </ul>
<b>13. Review Comments</b> Only Internal Users	<ul style="list-style-type: none"> <li>•Add comments about the review.</li> </ul>
<b>14. Review</b> Only Internal Users	<ul style="list-style-type: none"> <li>•Set review status: Approved, Denied, Returned, On Hold</li> </ul>