



## User Reference Guide

Document Upload Form  
General Navigation

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Document Upload

## **COURSE OVERVIEW**

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### **Course Description**

Upload a document to an organization, well, facility, project or pipeline.

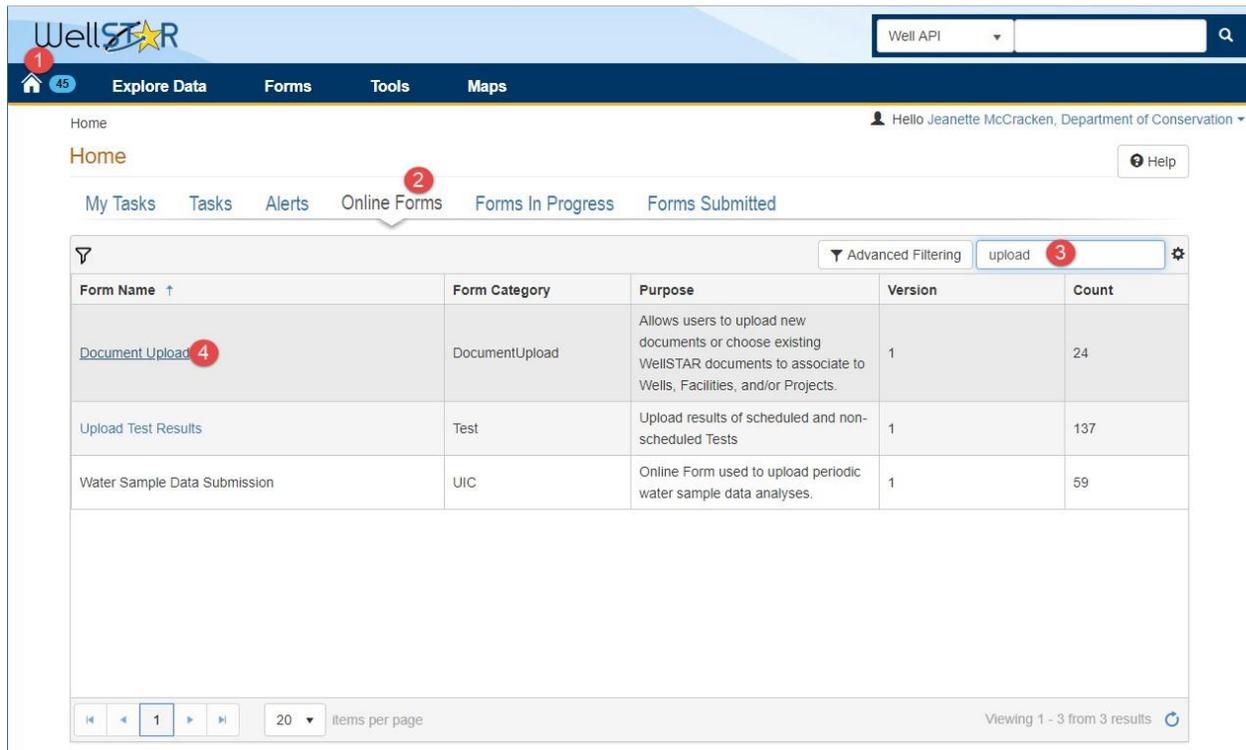
# 1 UPLOAD A DOCUMENT

A document can be uploaded to an Organization, Well, Facility, Project, or Pipeline.

Lesson Objectives:

- Upload a document to an organization
- Upload a document to a Well, Facility, Project, or Pipeline
- Review an Uploaded Document submission

## 1.1 Upload a document to an organization



Step	Action	Required Fields
1.	Access the home screen.	
2.	Click <b>Online Forms</b> .	
3.	Search for <b>Document Upload</b> .	
4.	Click the Blue <b>Document Upload</b> hyperlink.	

# Document Upload

WellSTAR

Well API

45 Explore Data Forms Tools Maps

Online Forms | Document Upload Hello Jeanette McCracken, Department of Conservation

## Document Upload

Help

Form Navigation

1. Form Information

Form Information [Hide Form Navigation]

This form is intended to associate documents to wells, facilities or projects. It is not intended for plans, monthly/quarterly reports or permits. \* Indicates Required Field

**Form Name**  
Document Upload

**Organization \***  
Chevron U.S.A. Inc. (C5640) - Bakersfield, CA 1

**Description \*** 2  
Upload Indemnity Agreement 2019

Cancel Save & Continue 3

Step	Action	Required Fields
1.	Choose the <b>Organization</b> .	Organization
2.	Enter a <b>Description</b> .	Description
3.	Click <b>Save and Continue</b> .	

## Document Upload

1. Form Information
<b>2. Operator Information</b>
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts. \* Indicates Required Field

**1** **Organization Name** **Type of Organization**  
 Chevron U.S.A. Inc. (C5640) Corporation

**Organization Primary Address**  
 9525 Camino Media  
 Bakersfield, CA 93311

**Organization Primary Phone Number** **Ext**  
 (661) 412-6082

**Contacts**

**2**

Name ↑	Phone Number	Email	Role	Actions
Jeanette McCracken	(916) 322-9768	Jeanette.McCracken@conservation.ca.govx	Submitter	
Mr. Nadim Hosn	(661) 654-7469	nhos@chevron.comx	Agent	

**3**

Step	Action	Required Fields
1.	Review organization information.	
2.	Add a contact if desired.	
3.	Click <b>Next</b> .	

# Document Upload

## Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Document Upload [Hide Form Navigation]

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

Category **1**

Well

Uploaded Documents

Advanced Filtering Actions **2** Search

Upload... Upload... Type Descri... File **3** Add New  
Export - Excel  
Export - PDF

Back Next Save

Step	Action	Required Fields
1.	Choose a category. This should relate to the document being uploaded.	Category
2.	Click <b>Actions</b> .	
3.	Click <b>Add New</b> .	

## Document Upload

The screenshot shows a 'Document Upload' window with the following elements:

- 1** Radio buttons for 'Upload New Document' (selected) and 'Associate Existing WellSTAR Document'.
- Checkboxes for 'Internal Only' and 'Confidentiality Requested'.
- A 'Category' dropdown menu currently showing 'Facility'.
- 2** A 'Type' dropdown menu.
- 3** A 'Relevant Date' field with a calendar icon.
- 4** A 'Description' text area with a note: 'All comments are discoverable records, open to public review.'
- 5** A 'Filename' field with a 'Browse' button highlighted in red.
- 8** 'Cancel' and 'Upload' buttons at the bottom right.

Step	Action	Required Fields
1.	To associate a new document: Leave the <b>Upload New Document</b> radio option selected.	
2.	Choose a <b>Type</b> of document.	Type
3.	Select a <b>Relevant Date</b> .	Relevant Date
4.	Enter a <b>Description</b> . This description will be attached to the document for the life of the document.	Description
5.	Click <b>Browse</b> .	
6.	Navigate to your document.	
7.	Select the document.	
8.	Click <b>Upload</b> .	

## Document Upload

The screenshot shows a 'Document Upload' window with a close button (X) in the top right corner. A legend indicates that an asterisk (\*) denotes a required field. Two radio buttons are present: 'Upload New Document' (unselected) and 'Associate Existing WellSTAR Document' (selected, marked with a red '1'). Below this is a 'Document ID \*' field with a search icon (marked with a red '2') and a search button (marked with a red '3'). A dropdown menu is open, listing document IDs and titles: 10073 - Designation of Agent, 10203 - Well Summary Form Snapshot, 10204 - Well Summary Form Snapshot, 10205 - Well Summary Generic Correspondence, and 10232 - Well Summary Form Snapshot. At the bottom right, there are 'Cancel' and 'Upload' buttons. Below the buttons is a table with columns 'Filename' and 'Docum...'. The 'Upload' button is highlighted in yellow.

Step	Action	Required Fields
1.	To associate an existing Document: <b>Select Associate Existing WellSTAR Document</b> radio option.	
2.	Find the document using the WellSTAR <b>Document ID</b> .	
3.	Click <b>Upload</b> .	

# Document Upload

## Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

### Document Upload [Hide Form Navigation]

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

**Category \***

Well

Uploaded Documents

Advanced Filtering
Actions

⚙

Upload...	Upload...	Type	Descri...	Filename	Docum...	Docum...	Actions
05/01/2019	Jeanette McCracken	CEQA Document	CEQA Indemnity Agreement 2019	01900347_DATA_5-16-2008.pdf		pdf	Actions

Back
Next
1
Save

Step	Action	Required Fields
1.	Click <b>Next</b> .	
2.	Scroll to the bottom of <b>4. Document Association</b> without selecting any Wells, Facilities, or Projects and click <b>Next</b> . Note: The document will be associated to the organization if not Well, Facility, or Project is selected.	

# Document Upload

Form ID: 6220

Form Navigation

- 1. Form Information
- 2. Operator Information ✓
- 3. Document Upload ✓
- 4. Document Association ✓
- 5. Form Submit**
- 6. Confirmation
- 7. Review Comments
- 8. Review

Form Submit [Hide Form Navigation]

Associate related online form submissions to this submission by entering the Form ID or Form Description.

### Online Form Association

Actions <sup>1</sup>

Form ID	Form Category	Title	Description	Actions
---------	---------------	-------	-------------	---------

### Comments

Actions

0 items per page No results to display

Add <sup>2</sup>

*All comments are discoverable records, open to public review.*

### Acknowledgement

**Submitter**  
Internal User Jeanette McCracken

**Date Received**  
05/01/2019

<sup>3</sup>  I hereby certify all statements made in this form are, to the best of my knowledge, true, correct, and complete. \*

### Form Submit Preview

Click the button below to preview your submission summary.

Preview Submission Summary

Back Submit <sup>4</sup> Save

## Document Upload

Step	Action	Required Fields
1.	Another form may be associated.	
2.	A Comment may be added.	
3.	Check the acknowledgment box.	acknowledgment box
4.	Click Submit.	

### 1.1.1 Key Points:

- This method will associate the document to the organization selected.
- This document will be accessible through the organization documents page after approval.

## 1.2 Upload a document to a Facility, Well, Project (UIC or UGS), or Pipeline.

The screenshot shows the WellSTAR web application interface. At the top, there is a navigation bar with 'Forms' highlighted. Below the navigation bar, the user is logged in as 'Hello Jeanette McCracken, Department of Conservation'. The main content area shows a 'Home' section with a 'Help' button. Below this, there are tabs for 'My Tasks', 'Tasks', 'Alerts', 'Online Forms', 'Forms In Progress', and 'Forms Submitted'. The 'Online Forms' tab is selected. A table of forms is displayed with columns for 'Form Name', 'Form Category', 'Purpose', 'Version', and 'Count'. The 'Document Upload' form is highlighted with a red circle and a blue hyperlink. Red callout numbers 1 through 4 indicate the steps: 1. Home icon, 2. Online Forms tab, 3. Search filter 'upload', and 4. Document Upload hyperlink.

Form Name ↑	Form Category	Purpose	Version	Count
<a href="#">Document Upload</a>	DocumentUpload	Allows users to upload new documents or choose existing WellSTAR documents to associate to Wells, Facilities, and/or Projects.	1	24
Upload Test Results	Test	Upload results of scheduled and non-scheduled Tests	1	137
Water Sample Data Submission	UIC	Online Form used to upload periodic water sample data analyses.	1	59

Step	Action	Required Fields
1.	Access the home screen.	
2.	Click <b>Online Forms</b> .	
3.	Search for <b>Document Upload</b> .	
4.	Click the Blue <b>Document Upload</b> hyperlink.	

# Document Upload

WellSTAR

Well API

45 Explore Data Forms Tools Maps

Online Forms | Document Upload Hello Jeanette McCracken, Department of Conservation

## Document Upload

Help

Form Navigation

1. Form Information

Form Information [Hide Form Navigation]

This form is intended to associate documents to wells, facilities or projects. It is not intended for plans, monthly/quarterly reports or permits. \* Indicates Required Field

**Form Name**  
Document Upload

**Organization \***  
Chevron U.S.A. Inc. (C5640) - Bakersfield, CA 1

**Description \*** 2  
Upload Indemnity Agreement 2019

Cancel Save & Continue 3

Step	Action	Required Fields
1.	Choose the <b>Organization</b> .	Organization
2.	Enter a <b>Description</b> .	Description
3.	Click <b>Save and Continue</b> .	

# Document Upload

1. Form Information
<b>2. Operator Information</b>
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Please confirm the correct Organization has been selected, and designate contact(s) with their correct role. By default, the Organization's Agent and the form submitter are selected as contacts. \* Indicates Required Field

**1** **Organization Name** **Type of Organization**  
 Chevron U.S.A. Inc. (C5640) Corporation

**Organization Primary Address**  
 9525 Camino Media  
 Bakersfield, CA 93311

**Organization Primary Phone Number** **Ext**  
 (661) 412-6082

**Contacts**

**2**

Name ↑	Phone Number	Email	Role	Actions
Jeanette McCracken	(916) 322-9768	Jeanette.McCracken@conservation.ca.govx	Submitter	
Mr. Nadim Hosn	(661) 654-7469	nhos@chevron.comx	Agent	

**3**

Step	Action	Required Fields
1.	Review organization information.	
2.	Add a contact if desired.	
3.	Click <b>Next</b> .	

# Document Upload

## Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Document Upload [Hide Form Navigation]

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

Category **1**

Well

Uploaded Documents

Advanced Filtering Actions **2** Search

Upload... Upload... Type Descri... File **3** Add New  
Export - Excel  
Export - PDF

Back Next Save

Step	Action	Required Fields
1.	Choose a category. This should relate to the document being uploaded.	Category
2.	Click <b>Actions</b> .	
3.	Click <b>Add New</b> .	

## Document Upload

The screenshot shows a 'Document Upload' window with the following elements:

- 1** Radio button for 'Upload New Document' (selected).
- Radio button for 'Associate Existing WellSTAR Document'.
- Checkboxes for 'Internal Only' and 'Confidentiality Requested'.
- 'Category' dropdown menu with 'Facility' selected.
- 2** 'Type' dropdown menu (required field).
- 3** 'Relevant Date' date picker (required field).
- 4** 'Description' text area (required field). Below it is the text: 'All comments are discoverable records, open to public review.'
- 5** 'Browse' button in the 'Filename' section (required field).
- File selection area with a document icon and mouse cursor.
- 8** 'Upload' button at the bottom right.

Step	Action	Required Fields
1.	Leave the <b>Upload New Document</b> radio option selected.	
2.	Choose a <b>Type</b> of document.	Type
3.	Select a <b>Relevant Date</b> .	Relevant Date
4.	Enter a <b>Description</b> . This description will be attached to the document for the life of the document.	Description
5.	Click <b>Browse</b> .	
6.	Navigate to your document.	
7.	Select the document.	
8.	Click <b>Upload</b> .	

## Document Upload

\* Indicates Required Field

Upload New Document

Associate Existing WellSTAR Document

Document ID \*

10073 - Designation of Agent

10203 - Well Summary Form Snapshot

10204 - Well Summary Form Snapshot

10205 - Well Summary Generic Correspondence

10232 - Well Summary Form Snapshot

Cancel Upload

Filename	Docum...

Step	Action	Required Fields
1.	To associate an existing Document: <b>Select Associate Existing WellSTAR Document</b> radio option.	
2.	Find the document using the WellSTAR <b>Document ID</b> .	
3.	Click <b>Upload</b> .	

# Document Upload

## Document Upload - Chevron U.S.A. Inc. (C5640)

Help

Form ID: 6220

Form Navigation

1. Form Information
2. Operator Information ✓
3. Document Upload
4. Document Association
5. Form Submit
6. Confirmation
7. Review Comments
8. Review

Document Upload [Hide Form Navigation]

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

**Category \***

Well ▼

**Uploaded Documents**

Advanced Filtering Actions ▼  ⚙

Upload...	Upload...	Type	Descri...	Filename	Docum...	Docum...	Actions
05/01/2019	Jeanette McCracken	CEQA Document	CEQA Indemnity Agreement 2019	01900347_DATA_5-16-2008.pdf		pdf	Actions▼

Back Next <sup>1</sup> Save

Step	Action	Required Fields
1.	Click <b>Next</b> .	

## Document Upload

Select Project

Advanced Filtering
Actions

Search 1

⚙️

<input type="checkbox"/>	Project ID ↑	Type	Field	County	Status
<input type="checkbox"/>	05406001	Water Disposal	Beverly Hills	Los Angeles	Terminated
<input type="checkbox"/>	12200004	Water Disposal	Casmalia	Santa Barbara	Terminated
<input type="checkbox"/>	12806007	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<span style="color: red; font-weight: bold;">2</span> <input type="checkbox"/>	12815017	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12815019	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821018	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821019	Water Disposal	Cat Canyon	Santa Barbara	Canceled
<input type="checkbox"/>	12821020	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821021	Water Disposal	Cat Canyon	Santa Barbara	Terminated
<input type="checkbox"/>	12821022	Water Disposal	Cat Canyon	Santa Barbara	Terminated

⏪
⏩
1
2
3
4
5
6
7
8
9
10
...
▶
⏭

10

items per page
Viewing 1 - 10 from 177 results
🔄

3
▼
▲

Associated Project

Advanced Filtering
Actions

Search

⚙️

<input type="checkbox"/>	Project ID	Type	Field	County	Status
<input type="checkbox"/>	12815017	Water Disposal	Cat Canyon	Santa Barbara	Terminated

Step	Action	Required Fields
1.	Search for the Well, Facility, Project, or Pipeline the document should be associated to.	

## Document Upload

2.	Click the box next to the selected subject.	
3.	Use the down arrow to move the subject into the associated lower grid.	
4.	Click <b>Next</b> .	

# Document Upload

Form ID: 6220

Form Navigation

- 1. Form Information
- 2. Operator Information ✓
- 3. Document Upload ✓
- 4. Document Association ✓
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Review

### Form Submit

[Hide Form Navigation]

Associate related online form submissions to this submission by entering the Form ID or Form Description.

#### Online Form Association

Actions <sup>1</sup>

Form ID	Form Category	Title	Description	Actions
---------	---------------	-------	-------------	---------

#### Comments

Actions

0 items per page No results to display

Add <sup>2</sup>

*All comments are discoverable records, open to public review.*

#### Acknowledgement

**Submitter**

Internal User Jeanette McCracken

**Date Received**

05/01/2019

<sup>3</sup>  I hereby certify all statements made in this form are, to the best of my knowledge, true, correct, and complete. \*

#### Form Submit Preview

Click the button below to preview your submission summary.

Preview Submission Summary

Back Submit <sup>4</sup> Save

## Document Upload

Step	Action	Required Fields
5.	Another form may be associated.	
6.	A Comment may be added.	
7.	Check the acknowledgment box.	acknowledgment box
8.	Click Submit.	

### 1.2.1 Key Points

- The document will be stored on the documents grid for each subject specified in 4. Document Association.
- If a subject is selected on 4. Document Association the document will not additionally be stored on the Organization documents page.

### 1.3 Review Document Upload

The screenshot displays the WellSTAR web application interface. At the top, there is a navigation bar with the WellSTAR logo, a search bar for 'Well API', and menu items for 'Home', 'Explore Data', 'Forms', 'Tools', and 'Maps'. Below the navigation bar, the user is identified as 'Hello Jeanette McCracken, Department of Conservation'. The main content area shows a 'Home' section with a 'Help' button and a 'My Tasks' tab selected. Under 'My Tasks', there is a table of tasks. The table has columns for 'Task Name', 'Organization', 'Status', 'Workgroup', 'Assigned To', 'Due Date', and 'Actions'. The tasks listed are 'Review Organization Information' for 'Badger Creek Ltd.', 'Angus Petroleum Corporation', and an unnamed organization, all with a status of 'Not Started'. The 'Workgroup' column contains links for 'Entity Information', 'Change', and 'Review'. At the bottom of the table, there is a pagination control showing '20 items per page' and 'Viewing 1 - 20 from 47 results'.

Step	Action	Required Fields
------	--------	-----------------

## Document Upload

1.	Navigate to the <b>My Tasks</b> page and select the blue <b>Review Document Upload Submission</b> task. The task name will be slightly different for each review group.	
----	---	--

The screenshot shows the 'Task Detail' page for a task named 'Review Document Upload Submission'. The page is divided into two main sections: a left sidebar with task details and a right main area with a form and comments.

**Task Detail (Left Sidebar):**

- Task Type:** System Generated
- Task Name:** Review Document Upload Submission
- Description:** Review Document Upload Submission. *All comments are discoverable records, open to public review.*
- Organization:** Andrew L. Newkirk
- Status:** Not Started
- Workgroup:** Well Document Review Workgroup
- Assigned To:** (Empty dropdown)
- Due Date:** (Empty date picker)
- Created Date:** 05/02/2019
- Created By:** Jeanette McCracken
- Buttons: Close, Edit (highlighted with a red circle '1')

**Main Area (Right):**

- Form:** Document Upload (highlighted with a red circle '6')
- Comments:** (Empty list with 'Actions' dropdown)
- Task History:**

Date ↓	Description
05/02/2019 08:40:01 AM	Jeanette McCracken created the task.

Step	Action	Required Fields
1.	Click the <b>Edit</b> button. 	
2.	Set the <b>Assigned To</b> box to your name by using the dropdown list.  Note: Only people who are part of the appropriate workgroup will appear on the list.	Assigned To

## Document Upload

3.	<p>The <b>Status</b> will automatically change to <b>In Progress</b>.</p> <p><b>Status</b>*</p> <p>In Progress</p> <p>Note: Claiming the task and verifying that it is documented as <b>In Progress</b> will ensure that multiple people do not perform the same task at one time.</p>	
4.	Set a <b>Due Date</b> .	Due Date
5.	<p>Click <b>Save</b>.</p> <p>Cancel Save</p>	
6.	Select the blue Form hyperlink to review the form.	

### Document Upload - Andrew L. Newkirk (N1223)

Help

Form ID: 6222

Form Navigation

- 1. Form Information
- 2. Operator Information ✓
- 3. Document Upload ✓
- 4. Document Association ✓
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 3 8. Review

Review [Hide Form Navigation]

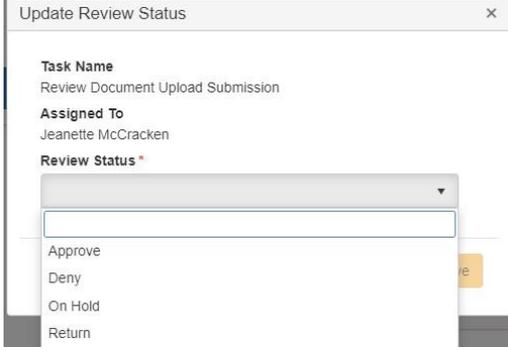
Task Name	Workgro...	Assigne...	Created	Last Up...	Review ...	Actions
Review	Well					
Document Upload Submission	Document Review Workgroup	Jeanette McCracken	05/02/2019 08:40 AM	05/02/2019 08:43 AM		<a href="#">Actions</a> <ul style="list-style-type: none"> <li>Update Review Status</li> <li>Create Sub Task</li> </ul>

10 items per page Viewing 1 - 1 from 1 results

Back Close

Step	Action	Required Fields
1.	Review information in the form.	

## Document Upload

2.	<p>Check if a document has been marked confidential or internal only. If either box is checked, verify each selection is appropriate for that document.</p> <p>Note: Confidentiality of documents is determined by statute and regulations. Contact your supervisor for more information.</p>	
3.	Navigate to <b>8. Review</b> .	
4.	Click the Action button in row with the task.	
5.	Click <b>Update Review Status</b> .	
6.	<p>Update the review status.</p>	

### 1.3.1 Key Points

- A document is not accepted into WellSTAR until the review is completed.