

Release Notes for R1.0 8/31/2017

Release 1 capabilities being implemented are:

- Bond Management
- Entity Management
- Administrative and general

This document will provide descriptions of each capability and the functionality being implemented within each capability.

The purpose of release notes is to address any known defects and associated workarounds for release 1 implementation on 8/31/2017.

Bond Management

There are three major processes in the Division's current Bond Management workflow that occur today; New Bond Received, Bond Release and Bond Verification.

The New Bond Received process describes how a bond would be received and processed by CalGEM, highlighting steps for the District Office, Headquarters (HQ) Bond Coordinator, and CalGEM Webmaster actors. The pre-WellSTAR process utilizes the CalWIMS, Bond Log, and Cash Bond Log tools.

The Bond Release process describes how a bond would be released by CalGEM, highlighting steps for the District, HQ Bond Coordinator, Operator, and Surety/Indemnity Company actors. The pre-WellSTAR process utilizes the CalWIMS, Bond Log, and Cash Bond Log tools.

The Bond Verification process describes how a bond would be released by CalGEM, highlighting steps for the District, HQ Bond Coordinator, Operator, and Surety/Indemnity Company actors. The pre-WellSTAR process utilizes the CalWIMS, Bond Log, and Cash Bond Log tools.

Specific functionality addressed in this area:

1. Create and Maintain Bonds
2. Generate Notifications to Operators
3. Generate Reports and Lists
4. Monitor Bond Status

The following are known defects being implemented and the associated alternate procedures for the Bond Management capability. These defects are being prioritized by the primary CalGEM stakeholders and fixes will be implemented based on the priority set by the business.

Defect	Issue	Alternate Procedure
9750	OFD004 - Bond Information Form - Bond Information step displays incorrectly when the user leaves fields unfilled and clicks Save	Navigate using Back/Next or steps on the Left Navigation panel.
9847	Online Form comments not transferred to the Documents panel when form is approved	Comments continue to appear on the form in the Forms Submitted grid on the landing page. Remove the pre-applied Status filter of 'Submitted' and apply the filter 'Approved' to find the particular form.
9681	Online forms sometimes (infrequently) navigates to landing / home page in the middle of a step	Navigate into online form from Forms In Progress or Forms Submitted tabs (depending on the progress of the form) on the landing / home page. Additionally, use single clicks when navigating in the system.
10236	Clicking buttons multiple times results in multiple submissions of a form	Duplicate instances of the form can be withdrawn. Wait for a response on the browser before next click.
10243	PD025 - IE & Edge Browsers, Forms Link does not navigate to Online forms tab when on the home / landing page	This issue only occurs on the home / landing page. Access the Online Forms from the Online Forms tab on the landing page. The issue does not occur on other pages.

Entity Management

There are two major processes in the Division's current Entity Management workflow that occur today; Operator Change of Information Request and Operator-Agents Information Monthly FTP site update. For details on these As-Is processes see *Entity Management As-Is Business Processes*.

The Operator Change of Information Request process describes how operators would communicate a desire to change their information. The process highlights steps for the Headquarters (HQ) Electronic Data Processing (EDP) Unit, HQ Bond Coordinator, Operators, and District Office actors.

The Operator-Agents Information Monthly File Transfer Protocol (FTP) site update process describes how the CalGEM public site is updated with new information on operators and/or agents. The process highlights steps for the CalGEM Webmaster and HQ Bond Coordinator actors. The pre-WellSTAR process utilizes the Agents Database and the Public Website tools.

Specific functionality addressed in this area:

1. Create Individual or User (Internal and External Users)
2. Create Workgroup

3. Create Organization
4. Modify Entity
5. Modify Role

The following are known defects being implemented and the associated alternate procedures for the Entity Management capability. These defects are being prioritized by the primary CalGEM stakeholders and fixes will be implemented based on the priority set by the business.

Defect	Issue	Alternate Procedure
7002	PD003 - Workgroup Detail - Quick Search on Associated People grid does not show all associated users when the value is cleared	To reset the filters, refresh the page.
9847	Online Form comments not transferred to the Documents panel when form is approved	Comments continue to appear on the form in the Forms Submitted grid on the landing page. Remove the pre-applied Status filter of 'Submitted' and apply the filter 'Approved' to find the particular form.
9681	Online forms sometimes (infrequently) navigates to landing / home page in the middle of a step	Navigate into online form from Forms In Progress or Forms Submitted tabs (depending on the progress of the form) on the landing / home page. Additionally, use single clicks when navigating in the system.
10236	Clicking buttons multiple times results in multiple submissions of a form	Duplicate instances of the form can be withdrawn. Wait for a response on the browser before next click.
10243	PD025 - IE & Edge Browsers, Forms Link does not navigate to Online forms tab when on the home / landing page	This issue only occurs on the home / landing page. Access the Online Forms from the Online Forms tab on the landing page. The issue does not occur on other pages.

WellSTAR Administrative and General

The administrative and general capabilities are specific to WellSTAR and not directly related to a capability.

Specific functionality addressed in this area:

1. Manage Task
2. Upload Document
3. Create Document
4. Generate Notice

5. Generate Report
6. Search WellSTAR
7. Access Online Help
8. Create Comments

The following are known defects being implemented and the associated alternate procedures for administrative and general capabilities. These defects are being prioritized by the primary CalGEM stakeholders and fixes will be implemented based on the priority set by the business.

Defect	Issue	Alternate Procedure
10117	PD016 - Task Detail - Cannot complete past due task	Set the due date to today or a future date.
9631	PD020 Display Report - Clear button missing from Report viewer page	To clear the results, refresh the page using the browser refresh button.
8879	PD023 - Internal Landing / Home Page - Alert bubble next to Home icon does not navigate to the Alerts tab	Manually click the Alerts tab.
10236	Clicking buttons multiple times results in multiple submissions of a form	Duplicate instances of the form can be withdrawn. Wait for a response on the browser before next click.
10243	PD025 - IE & Edge Browsers, Forms Link does not navigate to Online forms tab when on the home / landing page	This issue only occurs on the home / landing page. Access the Online Forms from the Online Forms tab on the landing page. The issue does not occur on other pages.

WellSTAR for Operators

External functionality is being implemented in release 1 for the bond and entity management processes. Operators will now manage bond and entity information in WellSTAR.

Specific functionality addressed in this area:

1. Login External User
2. Create Individual or User
3. Create Organization
4. Modify Entity
5. Modify Role
6. Create Bond
7. Modify Bond

The following are known defects being implemented and the associated alternate procedures for the External Operator capability. These defects are being prioritized by the primary CalGEM stakeholders and fixes will be implemented based on the priority set by the business.

Defect	Issue	Alternate Procedure
9750	OFD004 - Bond Information Form - Bond Information step displays incorrectly when the user leaves fields unfilled and clicks Save	Navigate using Back/Next or steps on the Left Navigation panel.
9847	Online Form comments not transferred to the Documents panel when form is approved	Comments continue to appear on the form in the Forms Submitted grid on the landing page. Remove the pre-applied Status filter of 'Submitted' and apply the filter 'Approved' to find the particular form.
9681	Online forms sometimes (infrequently) navigates to landing / home page in the middle of a step	Navigate into online form from Forms In Progress or Forms Submitted tabs (depending on the progress of the form) on the landing / home page. Additionally, use single clicks when navigating in the system.
8926	PD013 - External Landing / Home Page - Alerts Grid Column Settings Not Taken	To reset the columns selected, refresh the page.
10236	Clicking buttons multiple times results in multiple submissions of a form	Wait for a response on the browser before next click.
10243	PD025 - IE & Edge Browsers, Forms Link does not navigate to Online forms tab when on the home / landing page	This issue only occurs on the home / landing page. Access the Online Forms from the Online Forms tab on the landing page. The issue does not occur on other pages.