



User Reference Guide

ENTITY MANAGEMENT Create and Maintain Organization Module 1

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COURSE OVERVIEW

Course Description

In this course you will learn how to create and maintain an Organization in the WellSTAR system as well as review Organization data submittals. The request to create or maintain an Organization can be initiated by email, service request, business process, etc. Maintaining an Organization can include modifying or making the Organization inactive.

Process Flow

1 ORGANIZATION MANAGEMENT

This process will be used for creating an Organization in the WellSTAR system. An Operator is a type of Organization.

Lesson objectives:

- Search for Organization (for duplication)
- Create Organization
- Modify an Organization
- Make an Organization Inactive
- Review an external data submittal

1.1 Search Organization

1.1.1 Key Points

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

Entities

Step 1

Step 2

Help


Organizations **People** Workgroups

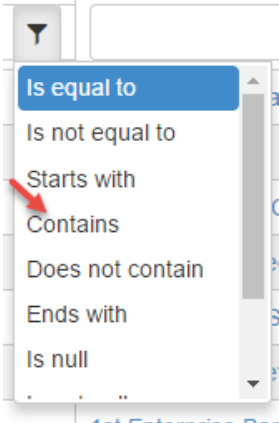
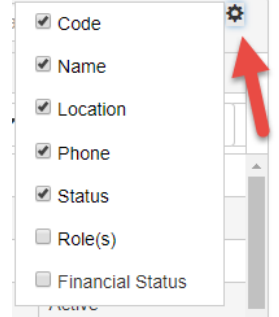
Advanced Filtering Actions Search

Code	Name ↑	Location	Phone	Status	Step 3
				Active	
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	

20 items per page Viewing 1 - 20 from 94 results

1.1.2 Steps to Search for duplicates

Step	Action	Required Fields
1.	From the home page hover over Explore Data and select Entities . Then ensure the Organizations 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 Organizations will be returned in the search results regardless of status. This is very important to prevent duplicates of Organizations 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 match. ii. Is not equal to: exclude exact match. iii. Starts with: exact match of beginning string. iv. Contains: exact match in any portion of search results (preferred). v. Does not contain: exclude exact match in any portion of search results. vi. Ends with: exact match of end of string. vii. Is null viii. Is not null ix. Is empty x. Is not empty 		
<p>Note:</p>	<p>The cog symbol can be expanded by clicking on it to reveal additional fields that can be added to the displayed table and searched.</p>		

1.2 Create Organization (including Operators)

1.2.1 Key Points

- A new Organization should only be created if the search results confirm there is not a preexisting entry for the Organization.
- Validation will be performed to ensure all required fields are complete.
- WellSTAR shows all DOGGR data, not just data for your district.
- A review must be completed after all Organization Questionnaire form submittals, see the review lesson of this user guide for details.

Entities

Help

Organizations People Workgroups

Code	Name ↑	Primary Address		Status
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
A2500	Anacapa Oil Corporation	Yuba City, CA		Active
N1223	Andrew L. Newkirk	Taft, CA		Active

Advanced Filtering Actions

1 2 3 4 5 20 items per page Viewing 1 - 20 from 94 results

1.2.2 Steps to Create an Organization

Step	Action	Required Fields
1.	Verify that the Organization does not already exist by searching (see lesson 1.1, Search Organization step 1).	
2.	Navigate to the Entity Management screen. Note: If you just searched for the Organization, you will already be on this screen	
3.	Use the Actions button to select Add Organization .	

Online Forms | Organization Questionnaire Hello Jeanette McCracken, Department of Conservation ▾

Organization Questionnaire Help

Form Navigation

1. Form Information

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 * Step 5

Cancel
Save & Continue

Step	Action	Required Fields
4.	Indicate that the Organization is an Operator by choosing the Yes radio dial for Do you currently operate, or intend to operate oil and gas wells or facilities in California? This form will be primarily completed by External Users, so the question uses the term “you”, answer Yes for any new Operator.	
5.	Enter any key identifying information in the Description box. This can be used to find the form in the future if you need to save and return to it later.	Description, California (Y/N)
6.	Click Save and Continue .	

Organization Questionnaire

Help

Form ID: 706

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

Organization

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

Type of Organization *

Name *

Short Name

Web Address

Role(s)

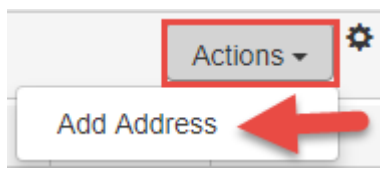
Organization Addresses ▶

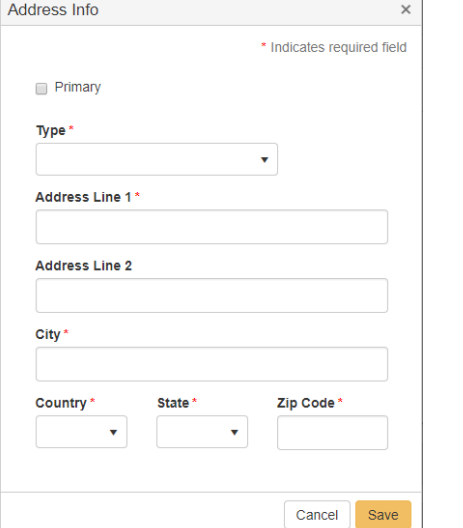
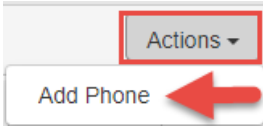
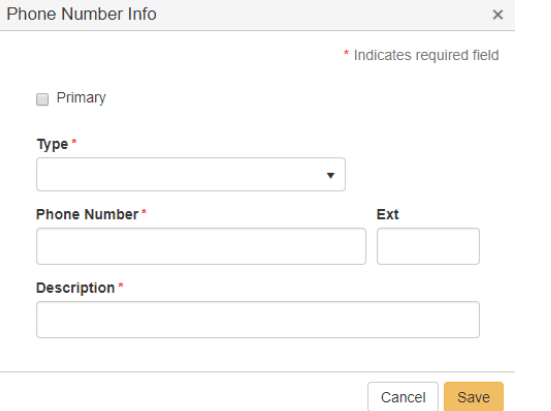
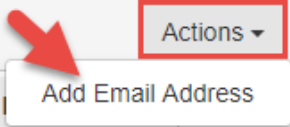
Organization Phone Numbers ▶

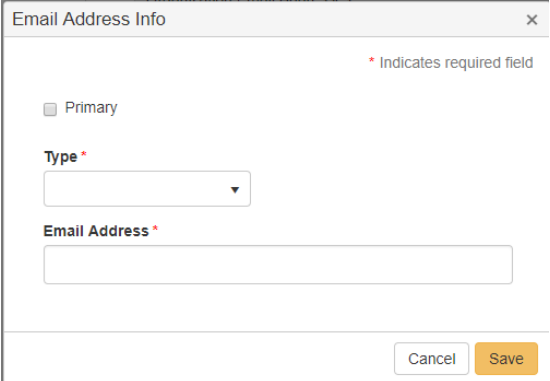
Organization Email Addresses ▶

Associated Organizations ▶

Back Next Save

Step	Action	Required Fields
7.	Enter Organization information in 2. Organization . Note: The Short Name field will autofill with the Organization name if the name is shorter than 40 characters. The Short Name is used for correspondence, to ensure that the Name does not become truncated when a label is created.	Type of Organization, Name
8.	Add an Address by expanding the Organization Addresses section using the arrow symbol ▼ and then using the Actions button to select Add Address .	

9.	Add the Address information.		Type, Address Line 1, City, Country, State, Zip Code
10.	<p>Select Save.</p> <p>Note: Multiple addresses can be added to the Organization, but only one can be marked as primary.</p>		
11.	<p>Add a Phone Number by expanding the Organization Phone Numbers section using the arrow symbol ▼ and then using the Actions button to select Add Phone Number.</p>		
12.	Add the Phone Number Info .		Type, Phone Number, Description
13.	<p>Select Save.</p> <p>Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>		
14.	<p>Add an Email Address by expanding the Organization Email Addresses section using the arrow symbol ▼ and then using the Actions button to select Add Email Address.</p>		

15.	Add the Email Address Info.		Type, Email Address
16.	Select Save. Note: Multiple email addresses can be added to the Organization, but only one can be marked as primary.		
17.	Associate an existing Organization by expanding the Associated Organizations section using the arrow symbol ▼ and then using the Actions button to select Add Associated Organization.		
18.	Use the Organization drop down to look up if an Organization exists in WellSTAR.		
19.	Choose a Relationship Type.	<ul style="list-style-type: none"> Contractor SubContractor Merged With Subsidiary 	
20.	Select Save.		
21.	When data entry is complete for section 2. Organization , select the Save button.		
22.	Select Next.		

Organization Questionnaire

Form ID: 706

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 ▼

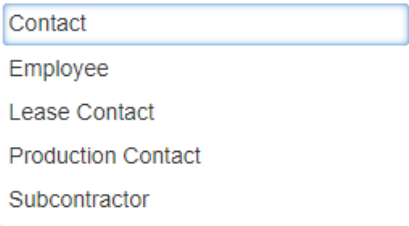
Name	WellSTAR User	Admin	Agent	Actions
Jenny Redd	Y	Y	N	Action▼

Help

Back

Next

Save

Step	Action	Required Fields
23.	3: People: To associate a person who already exists in WellSTAR: Click the Add Person button.	
24.	Click the Person Already Exists in WellSTAR button.	Exists in WellSTAR: Find Person, relationship type.
25.	Use the Find Person box to search for a person in the WellSTAR system.	
26.	Select a Relationship Type from the drop-down list. 	
27.	Set their Relationship Attributes . Note: Do not make a User an Admin for an Organization unless the Organization has requested that Relationship Attribute.	
28.	To create a new User associated to this organization view the Create and Maintain Person user guide lesson 1.2 for step by step instructions.	Does not Exist in WellSTAR: First Name, Last Name, Relationship
29.	Select Save .	
30.	Select Next .	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 673

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

Upload Documents

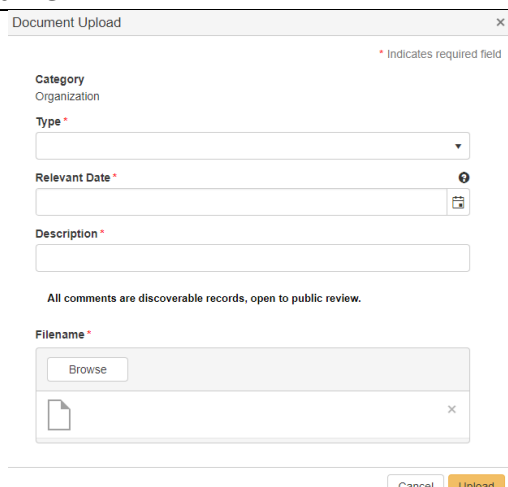
Select documents to be uploaded, if applicable. Click Add New and complete all required fields to upload a document.

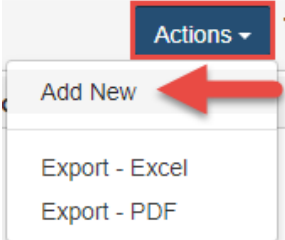
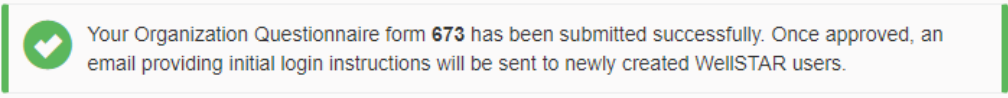
Uploaded Documents

Advanced Filtering **Actions** Search

Upload D...	Uploade...	Type	ne	Size	Actions
<div style="position: relative;"> <div style="position: absolute; top: -20px; left: 50%; transform: translate(-50%, -50%); background: white; border: 1px solid #ccc; padding: 5px;"> Add New Export - Excel Export - PDF </div> </div>					

Back Next Save

Step	Action	Required Fields
31.	4. Upload Documents: Use the Actions drop down to select Add New .	
32.	Enter the required information.	Type, Relevant Date, Description, File Name.
		
33.	Navigate to the file to be uploaded.	

	Note: When filing on behalf of the Organization, the original documentation submitted by the Organization via paper mail, email, or other method should be uploaded during this step.	
34.	Select Upload .	
35.	Select Save .	
36.	Select Next .	
37.	<p>5. Form Submit</p> <p>To associate a form that already exists in the WellSTAR system to this form (such as a bond information form):</p> <p>Use the Actions button to select Add New.</p>	
38.	Select the form to be associated.	
39.	Select Save .	
40.	To add a comment: Use the text box below the comments summary box.	
41.	Type your comment.	
42.	Check your content, spelling, and grammar.	
43.	<p>Select Add</p> <p>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>	
44.	<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.</p> <p>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
45.	<p>Preview your submission.</p> <p>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>	
46.	<p>6. Confirmation: view the confirmation to ensure the submission was successful.</p> 	

1.3 Maintain an Organization (modify Organization or Operator)

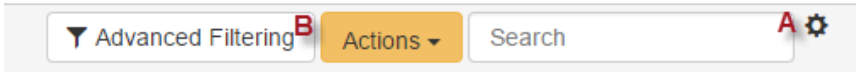
1.3.1 Key Points

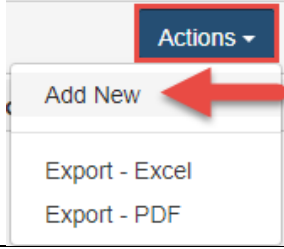
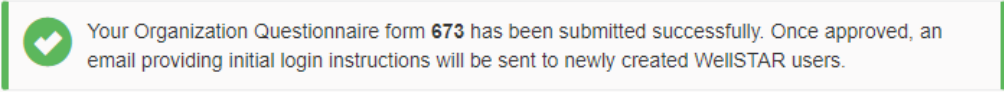
- Editing or removing information associated to an Organization does not delete the entry, rather it sets the old information to Inactive status.
- WellSTAR shows all DOGGR data, not just data for your District.
- All edits to the Organization are done through the Organization Questionnaire.

Organization Detail

The screenshot displays the 'ABA Energy Corporation' detail page. At the top right, there is a 'Help' button and two dropdown menus: 'Summary' and 'Actions'. The 'Actions' dropdown is open, showing three options: 'Edit Details', 'Transfer Assets', and 'Export - PDF'. A red arrow points from the 'Actions' dropdown to the 'Edit Details' option. The main content area is divided into several sections: 'Short Name' (ABA Energy Corporation), 'Code' (A0150), 'Status' (Active), 'Name' (ABA Energy Corporation), 'Organization Type' (Corporation), 'Primary Phone', 'Primary Address' (2625 Fair Oaks Boulevard, Suite 10, Sacramento, CA 95864), 'Web Address', '24-Hr Emergency Phone', 'Agent Address', 'Agent Name', 'Agent Email', and 'Financial Status'.

1.3.2 Steps to Modify (maintain) an Organization or Operator

Step	Action	Required Fields
1.	<p>A. In the Organizations tab use the Search box to enter search criteria.</p> <p>B. Searches can be performed for more than one criteria at a time, or build upon search results by using the Advanced Filtering feature (For additional information on using advanced filtering return to 1.1 step 3 of this document.)</p> 	
2.	Select the record to be modified by clicking on the Organization Name .	
3.	Use the Actions button to select Edit Details . The Organization Questionnaire, prepopulated with the existing data will appear.	
4.	Navigate the form tabs on the right side to access the information to be edited.	
5.	Make edits as needed. Note: For section by section instructions for filling out the Organization Questionnaire form, see the Create Organization lesson above.	
6.	Upload supporting documentation if needed.	

	Note: The original documentation submitted by the Organization via paper mail, email, or other method should be uploaded during this step.	
7.	Save edits.	
8.	<p>Navigate to 5. Form Submit</p> <p>To associate a form that already exists in the WellSTAR system to this form (such as a bond information form):</p> <p>Use the Actions button to select Add New.</p>	
9.	Select the form to be associated.	
10.	Select Save .	
11.	To add a comment: Use the text box below the comments summary box.	
12.	Type your comment.	
13.	Check your content, spelling, and grammar.	
14.	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.	
15.	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 modify the Organization	Acknowledgement
16.	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.	
17.	<p>6. Confirmation: view the confirmation to ensure the submission was successful.</p> 	

1.4 Maintain an Organization (Make Organization or Operator Inactive)

1.4.1 Key Points

- An Organization cannot be made **Inactive** if they have any active, idle, or new wells associated to them, or if they have an active bond associated to them.

Release 2.0 EM02 Create and Maintain Organization

- WellSTAR shows all DOGGR data, not just data for your District.
- An Organization Questionnaire can be generated for this activity; it does not have to be part of a review of a previous Organization Questionnaire form.
- This action does not trigger a review process, as it is part of the review process.
- Organizations cannot edit any of the review sections or fields.

Form ID: 536

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

Reviewer Fields

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

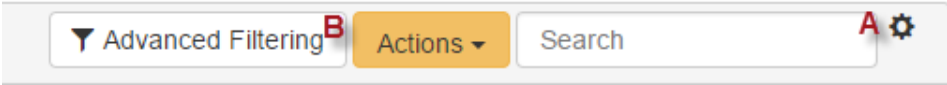
Organization Status *

Active ←

Financial Status *

Back Next Save

1.4.2 Steps to make an Organization inactive

Step	Action	Required Fields
1.	<p>A. In the Organizations tab use the Search box enter search criteria.</p> <p>B. Searches can be performed for more than one criteria at a time, or build upon search results by using the Advanced Filtering feature: (for additional information on using advanced filtering return to 1.1 step 4 of this document.)</p> 	
2.	Select the Organization to be made Inactive.	
3.	Use the Actions button to select Edit Detail .	
4.	In the 8. Reviewer Fields Tab change the Organization Status or Financial Status as needed.	
5.	Select Save .	


1.5 Review Organization Data submissions

1.5.1 Key Points

- All data submitted through the Organization Questionnaire will be reviewed using this process.
- Always assign the task to yourself before working on the task.

The screenshot shows the WellSTAR web application interface. At the top, there is a navigation bar with 'Home', 'Explore Data', 'Forms', 'Tools', and 'Maps'. Below this, a user profile for 'Hello Jeanette McCracken, Department of Conservation' is displayed. The main content area shows a 'MyTasks' section with a list of tasks. The first task, 'Review Organization Information' for 'abalabi Energy Inc', is highlighted with a red box. The task details include 'Status: In Progress', 'Workgroup: Entity Information Change Review', 'Assigned To: Jeanette McCracken', and 'Due Date: 01/31/2018'. The interface also includes a search bar, 'Advanced Filtering' options, and a pagination control showing 'Viewing 1 - 8 from 8 results'.

1.5.2 Steps to Review External Organization Data submissions

Step	Action	Required Fields
1.	Navigate to the My Tasks page. Note: This is your WellSTAR home page, so pressing the Home icon  will take you to the My Tasks page.	
2.	Search for the task, using Advanced Filtering if needed.	
3.	Select the Review Organization Information task to be reviewed.	
4.	Select the Task Name to view the Task Detail page.	

Task Detail

Help

Task Type
System Generated

Task Name
Review Organization Information

Description
Department Review of submitted OFD001 information.

All comments are discoverable records, open to public review.

Organization
Silk Gas Storage

Status
In Progress

Workgroup
Entity Information Change Review

Assigned To
Jeanette McCracken

Due Date
01/31/2018

Created Date
12/04/2017

Created By
jeanTRN mccracken07

Close Edit

Form

OFD001 - Organization Questionnaire

Comments

Actions

0 items per page

All comments are discoverable records, open to public review.

Task History

Date	Description
01/22/2018 10:09:56 AM	Jeanette McCracken changed the Due Date to 1/31/2018 12:00:00 AM.
	Jeanette McCracken changed the Assignee to

Step	Action	Required Fields
5.	Select Edit button.	
6.	Change the Assigned To box to your name Note: the status will automatically change to In Progress.	Status
7.	Select Save .	
8.	Select the blue Form hyperlink to review the form.	

Release 2.0 EM02 Create and Maintain Organization

Form ID: 525

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

Review Comments

Comments Actions ▾

01/22/2018 10:10:26 AM : Jeanette McCracken , Department of Conservation
Sent in VIA email

⏪ ⏩ 1 ⏪ ⏩

20 items per page Viewing 1 - 1 from 1 results ↻

All comments are discoverable records, open to public review.

Back
Next

Step	Action	Required Fields
9.	Review the data submitted by the Organization.	
10.	7. Review Comments To add a comment: Use the text box below the comments summary box.	
11.	Type your comment.	
12.	Check your content, spelling, and grammar.	
13.	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.	

Release 2.0 EM02 Create and Maintain Organization

Form ID: 525

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

Reviewer Fields

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

Organization Status *

Active

Financial Status *

Active

Back Next Save

Step	Action	Required Fields
14.	<p>8. Reviewer Fields</p> <p>Change the Organization Status or Financial Status as needed.</p> <p>Note: This change is not subject to a review, as it is part of the review. Ensure that you need to alter either of these fields before you make any changes to these fields.</p>	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 673

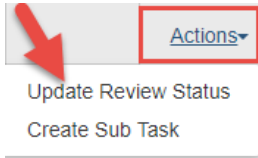
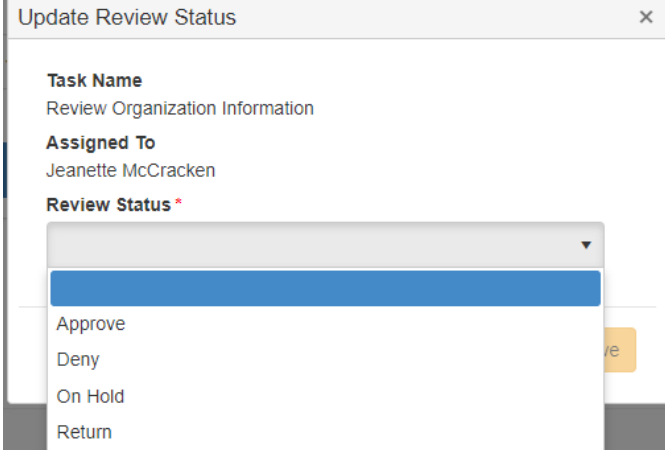
Form Navigation

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

Review						
Task Name	Workgro...	Assigne...	Created	Last Upd...	Review ...	Actions
Review Organization Information	Entity Information Change Review		01/19/2018 11:52 AM	01/19/2018 11:52 AM		Actions

◀ 1 ▶ | 10 items per page | Viewing 1 - 1 from 1 results

Back Close

Step	Action	Required Fields
15.	<p>9. Review</p> <p>Use the Actions blue link to select Update Review Status. Note: If the Actions button is grayed out you must first go Claim the task. If you missed this step you can use the Task Name blue hyperlink to go to the task and claim it. Once claimed, refresh the Section 9. Review page and you will be able to interact with the Actions button for that task.</p>	
16.	<p>Set the Status as appropriate: Approve, Deny, Return, On Hold.</p> <p>Note: The task assigned to you in step 5 of this lesson will automatically be completed once you change the Status of the form from this section. There is no need to return to the original task.</p>	
17.	<p>WellSTAR will notify the Organization about the status of the change, and if the change was approved, WellSTAR will update the data.</p>	