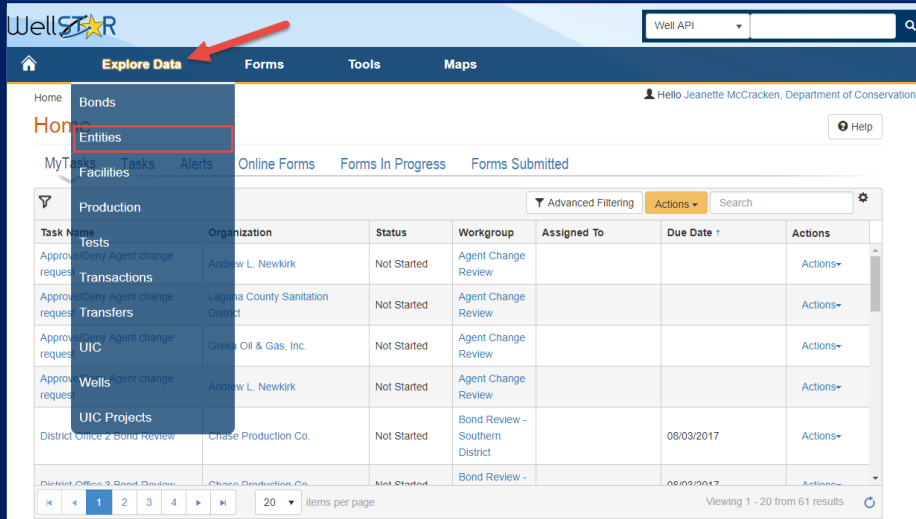


# Entity Management

## Quick Reference Guide



### WellSTAR Home Screen



### Tips

#### Search WellSTAR:

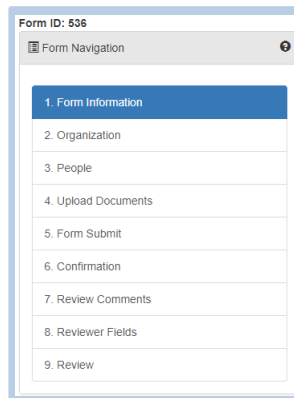
WellSTAR often has more than one way to perform the same action, especially searching. A User can search for an entity:

- 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) In the advanced filtering from the Entities page.

**TIP:** Always search before creating new Entities.

#### Create an Organization

- From the **Explore Data** tab, select **Entities**.
- Search the **Organization** tab to prevent duplicates.
- Use the **Actions** button to **Add Organization**.
- Use the **Form Navigation** to enter all information.



#### 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**.

#### 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 can 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.**

# Entity Management

## Quick Reference Guide



### 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.

**Entities** Step 1 Step 2 Help

Organizations **People** Workgroups

Advanced Filtering Actions Search

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	

20 items per page Viewing 1 - 20 from 94 results

### 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:** 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

### Review Externally Submitted Entity Data

- From **My Tasks** page, select a **Review Organization** information task.
- Use the **Actions** button to **Claim** the task. Form ID: 536
- Once in the task use the **Edit** button to enter edit mode and set the **Assigned To** box to your name.
- Enter a **Due Date**.
- Click the blue form link in the top right.
- Review the data. Add any comments to section **7. Review Comments**.
- Use section **8. Reviewer Fields** to change the **Organization Status** or **Financial Status** as needed.
- Use the form section **9. Review tab** select the task claimed previously and set the **Status** as appropriate: **Approve**, **Deny**, **Return**, **On Hold**.
- Once approved the task **Status** will automatically be updated to **Complete**.

Form ID: 536

Form Navigation

- Form Information
- Organization
- People
- Upload Documents
- Form Submit
- Confirmation
- Review Comments
- Reviewer Fields
- Review

### 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.

