



# User Reference Guide

## ENTITY MANAGEMENT Create and Maintain Person Module 2

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## **COURSE OVERVIEW**

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### **Course Description**

This process includes creating and maintaining people in WellSTAR. This includes Individuals and Users. An agent can also be designated using this process. Changes to the Security Assignments are not covered in this User Guide, but can be found in the WellSTAR for Administrators User guide.

## **1 CREATE AND MAINTAIN PERSON**

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This process will be used for creating, modifying and making Individuals or Users inactive. This process will be used to create People on behalf of the Organizations. This process is not used to create an Internal User. All Internal User accounts must be set up through the service desk. Instructions for adding a person as an Internal User are detailed in the WellSTAR For Administrators User guide.

Lesson Objectives:

- Search for a Person
- Create Person
- Modify Person
- Make person inactive

### **1.1 Search for an Individual or User**

#### **1.1.1 Key Points**

- Always conduct a search in WellSTAR before adding or modifying any Person, Organization, etc.
- WellSTAR shows all CalGEM data, not just data for one District.

## Create and Maintain Person

**Entities** Help

Organizations **People** Workgroups

Step 1 → Step 2 →

Advanced Filtering Actions Search

Name ↑	Primary Phone	WellSTAR User	Role(s)	Status Step 3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active
Aasia Newsome		Y		Active
Agent Form Test Test	(916) 666-6666	Y	Engineer	Active
Aj Ajiduah		Y		Active
Ajay Bhat		Y		Active
Albus Dumbledore	(267) 578-1248	Y	Contact	Active
Amanda Parks		Y		Active
Anna Hinh		Y		Active
Annie Richardson		Y		Active

1 2 3 4 5 6 20 items per page Viewing 1 - 20 from 112 results

### 1.1.2 Steps to search for an Individual or User

Step	Action	Required Fields
1.	From the home page click on <b>Explore Data</b> and select <b>Entities</b> . Then ensure that the <b>People</b> tab is selected. Note: when the page loads the <b>Organizations</b> tab will be selected by default.	
2.	Click <b>Advanced Filtering</b>	
3.	Delete <b>Active</b> from the <b>Status</b> search criteria. This step ensures that all People will be returned in the search results regardless of status. This is very important to prevent duplicates of People that already exist.	
4.	A. When <b>Advanced Filtering</b> 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"><li>i. <b>Is equal to:</b> exact match</li><li>ii. <b>Is not equal:</b> exclude exact match</li><li>iii. <b>Starts with:</b> exact match of beginning string</li><li>iv. <b>Contains:</b> exact match in any portion of search results (preferred)</li><li>v. <b>Does not contain:</b> exclude exact match in any portion of search results</li><li>vi. <b>Ends with:</b> exact match of end of string</li><li>vii. <b>Is null</b></li><li>viii. <b>Is not null</b></li><li>ix. <b>Is empty</b></li><li>x. <b>Is not empty</b></li></ul>	
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## 1.2 Create Person in WellSTAR

### 1.2.1 Key Points

- A person is either an Individual (someone without WellSTAR access, but for whom there is contact information in the System), or a User (someone with access to WellSTAR and some level of Security Assignment).
- A Person is added through the Organization Questionnaire Section 3. People.
- This process will rarely need to be completed by CalGEM staff as Organizations can add people to their Organization through the Organization Questionnaire.
- This process can be used to associate a person who already existing in WellSTAR to an Organization.

### 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?**

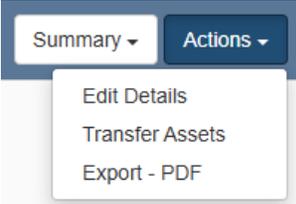
Yes  No

**Description \***

Cancel Save & Continue ←

## Create and Maintain Person

### 1.2.2 Steps to create a Person

Step	Action	Required Fields
1.	Verify the Individual or User does not already exist by searching (see the Search lesson at the beginning of this user guide).	
2.	Look up the Organization the Person is to be added to. If the Organization does not exist create it using the steps outlined in the Create and Maintain Organization User Guide.	
3.	From the Operator detail page select the <b>Actions</b> button and Choose <b>Edit Details</b> . 	
4.	Section <b>1. Form Information</b> , Create a <b>Description</b> .	Description
5.	Select <b>Save and Continue</b> .	
6.	Select section <b>3. People</b> . The total number of people included in the Organization will be displayed.	
7.	Select <b>Continue</b> .	

### Organization Questionnaire - 1062 McGaw APG LLC (11669)

Help

Form ID: 645641

Form Navigation

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

People [Hide Form Navigation]

Enter Person information related to the Organization below. \* Indicates Required Field

Name	WellSTAR User	Admin	
Clark Neuhoff	Y	Y	Y <span style="float: right;">Actions</span>
Ed Coltuneac	Y	Y	N <span style="float: right;">Actions</span>
Eric Witten	Y	Y	N <span style="float: right;">Actions</span>

Actions   
Add Person

Back Next Save

## Create and Maintain Person

Step	Action	Required Fields
8.	The People associated to this organization will be displayed in the <b>People</b> window. Click the <b>Actions</b> button in the top right and select <b>Add Person</b> .	

### Organization Questionnaire - 1062 McGaw APG LLC (11669)

Help

Form ID: 645641

Form Navigation

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

Person Info [Hide Form Navigation]

\* Indicates Required Field

Person Already Exists in WellSTAR
  Person Does Not Exist in WellSTAR

**First Name \*** 
**Middle Name** 
**Last Name \***

Addresses ▶

Phone Numbers ▶

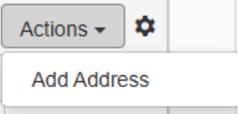
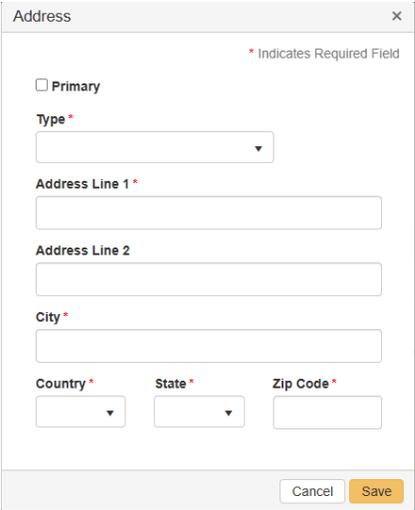
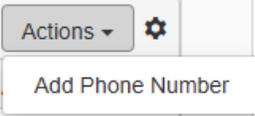
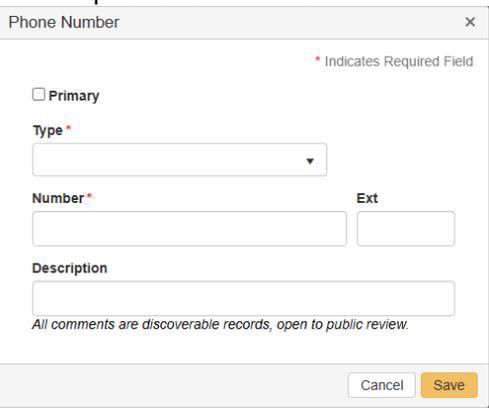
**Email \***

**Relationship Types \*** 
**Relationship Attributes**
 WellSTAR User
  Admin
  Agent

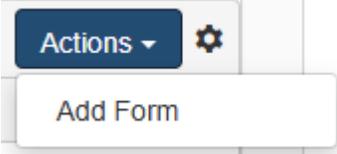
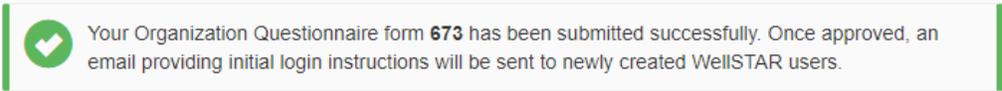
**Role(s)**

9.	<p>To create a new Person, change the radio dial to <b>Person Does Not Exist in WellSTAR</b>.</p> <p> <input type="radio"/> Person Already Exists in WellSTAR                             <input checked="" type="radio"/> Person Does Not Exist in WellSTAR                         </p> <p>Note: To add a person who already exists in WellSTAR, select the <b>Person Already Exists in WellSTAR</b> option and use the <b>Find person</b> box to search for the person.</p>	
10.	Enter the Person information.	First Name, Last Name,

Create and Maintain Person

	Note: An email address must be entered for new Users. When the User is created WellSTAR will send an email to the new User with instructions on how to access the WellSTAR system.	If User: Email
11.	Add an Address by expanding the <b>Addresses</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Address</b> . 	
12.	Add the Address information. 	Type, Address Line 1, City, Country, State, Zip Code
13.	Select <b>Save</b> . Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.	
14.	Add a Phone Number by expanding the <b>Phone Numbers</b> section using the arrow symbol ▼ and then using the <b>Actions</b> button to select <b>Add Phone Number</b> . 	
15.	Add the phone contact information. 	Type, Phone Number, Description
16.	Select <b>Save</b> . Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.	

Create and Maintain Person

17.	Assign the new person a <b>Relationship Type: Contact, Employee, Lease Contact, Production Contact, or Subcontractor.</b>	
18.	If the new Person is a User, use the <b>Relationship Attributes</b> check boxes to select <b>WellSTAR User</b> . The new person may be given more than one <b>Relationship Attributes</b> by checking the box for more than one selection.	
19.	When data entry is complete click the <b>Save</b> button.	
20.	Navigate to section <b>5.Form Submit</b> . To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the <b>Actions</b> button to select <b>Add Form</b> .  	
21.	Select the form to be associated.	
22.	Select <b>Save</b>	
23.	To add a comment: Use the text box below the comments summary box.	
24.	Type your comment.	
25.	Check your content, spelling, and grammar.	
26.	Select <b>Add</b> 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.	
27.	Check the <b>“I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete”</b> box. Your name will appear in the <b>submitter</b> 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 create the Organization.	Acknowledg ement
28.	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.	
29.	<b>6: Confirmation:</b> view the confirmation to ensure the submission was successful.  	
30.	WellSTAR system sends email to new User Email Text: Welcome to WellSTAR. A request was received to create a WellSTAR login for you. Please use following username and password when logging into the system. You will then be prompted to change your password.	

## Create and Maintain Person

	URL: <a href="http://www.WellSTAR.com">www.WellSTAR.com</a> Username: {username} Password: {tempPassword} If you did not make this request please contact the WellSTAR Administrator at (916) 555-1212.	
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## **1.3 Modify Individual or User**

### **1.3.1 Key Points**

- There are two ways to edit a Person in WellSTAR. A Person can be looked up and edited directly from their Profile page (Option One) or can be edited as part of the Organization (Option Two). A Person's relationship with that Organization can only be changed through Option Two.
- External Users can have their organization admin make changes to their profile, so this process will be used rarely by CalGEM Staff.
- Modifying Person information for all user, other than the Agent, page does not trigger the review process. If the Agent's information is updated, an internal review task is triggered.

## Create and Maintain Person

### 1.3.2 Option One: Steps to modify Person Information

Note: you cannot associate or disassociate a person from an Organization or alter their relationship with that Organization through this process. To alter Organization related Person information proceed to Option Two below in this user guide.

#### Person Detail Edit

The screenshot shows a web form titled "Person Detail Edit" for a user named "Jeanette McCracken". The form has a blue header bar with the name and an "Actions" button. Below the header, there are several input fields and dropdown menus:

- First Name \***: Text input containing "Jeanette".
- Middle Name**: Empty text input.
- Last Name \***: Text input containing "McCracken".
- Email**: Text input containing "Jeanette.mccracken@conservation.ca.gov".
- Status**: Dropdown menu with "Active" selected.
- WellSTAR User**: Dropdown menu with "Yes" selected.

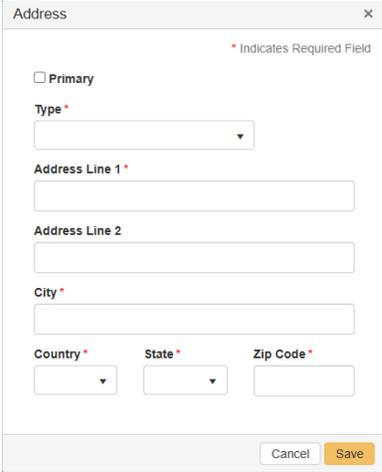
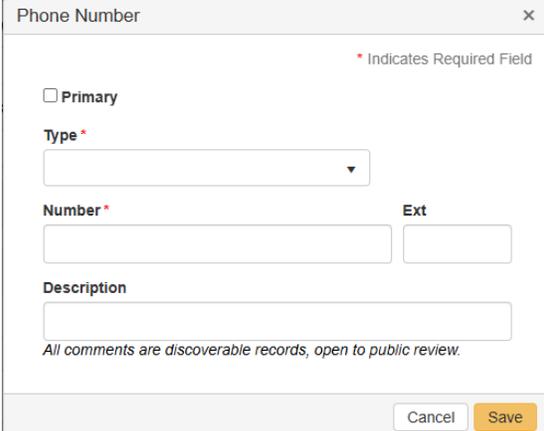
Below these fields are four expandable sections, each with an "Add" button:

- Associated Addresses**: Add Address
- Associated Phone Numbers**: Add Phone Number
- Associated Roles**: Add Role
- Associated Organizations**: Add Organization

At the bottom of the form are "Cancel" and "Save" buttons.

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	
2.	Select a record to modify by clicking on the <b>Name</b> .	
3.	Use the <b>Actions</b> button to select <b>Edit Details</b> .	
4.	Edit any of the heading information by clicking the box of the field to be edited.	
5.	Add an Address by selecting the <b>Add Address</b> button.	

Create and Maintain Person

<p>6.</p>	<p>Add the Address information.</p> 	<p>Type, Address line 1, City, Country, State, Zip Code</p>
<p>7.</p>	<p>Select <b>Save</b>. Note: Multiple addresses can be added to the Person’s profile, but only one can be marked as primary.</p>	
<p>8.</p>	<p>Add a phone number by selecting the <b>Add Phone Number</b> button.</p>	
<p>9.</p>	<p>Add the phone number information.</p> 	<p>Type, Phone Number, Description</p>
<p>10.</p>	<p>Select <b>Save</b>. Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>	
<p>11.</p>	<p>Add an associated role by selecting the <b>Add Role</b> button.</p>	
<p>12.</p>	<p>Add the Role information.</p> 	<p>Role</p>

## Create and Maintain Person

13.	Select <b>Save</b> . Note: A person may have many roles. These roles are not related to the Security Assignments for the WellSTAR system.	
14.	Select <b>Save</b> on the <b>Person Detail Edit</b> page to save and exit editing.	

### 1.3.3 Option two: Steps to modify Person Information

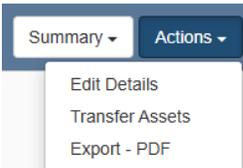
Note: Through this process the relationship between a person and an Organization can be updated.

## Organization Questionnaire - ABA Energy Corporation (A0150)

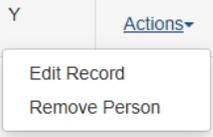
Help

Form ID: 534

The screenshot shows the 'Form Navigation' panel on the left with '3. People' selected and highlighted in blue. A red arrow points to this selection. The main content area is titled 'People' and contains a table of person records. The table has columns for 'Name', 'WellSTAR User', 'Admin', 'Agent', and 'Actions'. The first row is 'A Irani'. A red arrow points to the 'Actions' dropdown for this row, which is open, showing options: 'Edit Record' (highlighted with a red box), 'Remove Person', and 'Action'. A legend indicates that an asterisk (\*) denotes a required field.

Step	Action	Required Fields
1.	Search for the Organization associated with the Person to be edited.	
2.	Select the Organization record by clicking on the <b>Name</b> .	
3.	Use the <b>Actions</b> button to select <b>Edit Details</b> . 	
4.	Open section <b>3. People</b> The total number of people included in the Organization will be displayed. Select <b>Continue</b> below this statement. 	

## Create and Maintain Person

5.	<p>The People associated to this organization will be displayed in the <b>People</b> window. Click the <b>Action</b> link right of the name of the person to be edited. From the actions menu, you may <b>Edit Record</b> or <b>Remove Person</b>.</p> <p>Note: Removing a person does not delete them from WellSTAR, it sets their association to this Organization to Inactive.</p>	
6.	<p>Select <b>Edit Record</b>.</p> 	

### Organization Questionnaire - Abalabi (10745)

[Help](#)

Form ID: 717

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

Person Info

\* Indicates required field

Person Already Exists in WellSTAR
  Person Does Not Exist in WellSTAR

First Name \* 
 Middle Name 
 Last Name \*

Addresses

Phone Numbers

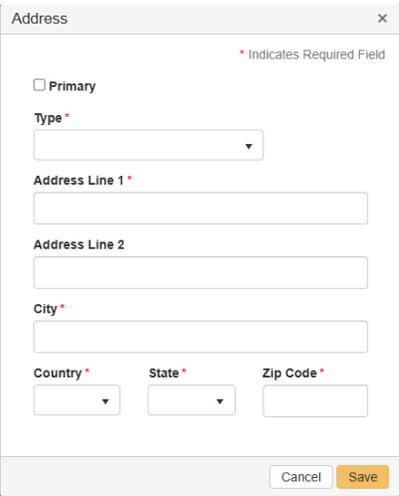
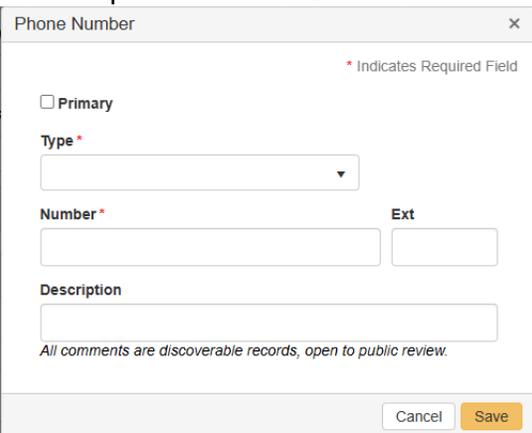
Email

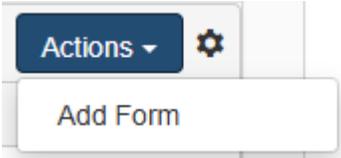
Relationship Types \* 
 Relationship Attributes  WellSTAR User  Admin

Role(s)

7.	<p>Edit any of the heading information by clicking the box of the field to be edited.</p>	
8.	<p>Add an Address by expanding the Add Address section, clicking Actions, and selecting <b>Add Address</b>.</p>	

## Create and Maintain Person

9.	<p><b>Add the Address information.</b></p> 	Type, Address line 1, City, Country, State, Zip Code
10.	<p><b>Select <b>Save</b>.</b></p> <p>Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.</p>	
11.	<p>Add a phone number by expanding the Phone Numbers section, clicking <b>Actions</b>, and selecting <b>Add Phone Number</b>.</p>	
12.	<p><b>Add the phone number information.</b></p> 	Type, Phone Number, Description
13.	<p><b>Select <b>Save</b>.</b></p> <p>Note: Multiple phone numbers can be added to the Person, but only one can be marked as primary.</p>	
14.	<p>To associate a relationship type, click in the <b>Relationship Type</b> box and select from the drop-down menu.</p>	
15.	<p>Change <b>Relationship Attributes</b> as needed by checking or unchecking the boxes.</p> <p>Note: This includes making a person the Agent of the Organization.</p>	
16.	<p>To associate a role, click in the <b>Roles</b> box and select from the drop-down menu.</p>	
17.	<p>Select <b>Save</b> on the <b>3. People Section</b> of the form.</p>	

18.	<p>Navigate to section <b>5.Form Submit</b>. To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the <b>Actions</b> button to select <b>Add New</b>.</p> 	
19.	Select the form to be associated.	
20.	Select <b>Save</b>	
21.	To add a comment: Use the text box below the comments summary box.	
22.	Type your comment.	
23.	Check your content, spelling, and grammar.	
24.	<p>Select <b>Add</b></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>	
25.	<p>Check the <b>“I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete”</b> box. Your name will appear in the <b>submitter</b> 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
26.	<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>	
27.	<b>6: Confirmation:</b> view the confirmation to ensure the submission was successful.	

## 1.4 Make Individual or User Inactive

### 1.4.1 Key Points

- When made inactive, Individuals and Users are still associated to the Organization in the system, but are not active. No information is deleted.
- WellSTAR shows all CalGEM data, not just data for one District.

## Create and Maintain Person

### 1.4.2 Steps to Make Individual or User Inactive

Home | Entities | Ariel Pruitt

#### Person Detail

Help

Ariel Pruitt

Summary Actions

**User Information**  
Ariel Pruitt

**Phone**

**Email**  
Ariel.pruitt@conservation.ca.gov

**Status**  
Active

**WellSTAR User**  
Yes

Associated Addresses

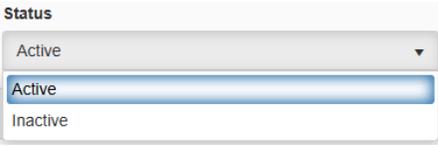
Associated Phone Numbers

Associated Roles

Associated Organizations

Associated Workgroups

Comments

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	
2.	Select a Person to become inactive by clicking on the <b>Name</b> .	
3.	Use the <b>Actions</b> button to select <b>Edit Details</b> .	
4.	Set the <b>Status</b> to <b>Inactive</b> . 	
5.	Click the <b>Save</b> button to save changes and close out of editing.	