**NorthSTAR Training – General Functionality Key Points**

**Internal Log-In**

**Task Name: Login and Basic Home Page Navigation**

(Training Module 1, Power Point NorthSTAR Basic Function slide file)

|  |  |
| --- | --- |
| **Command** | Description |
| ***Navigate to Log-in page and proceed to Home Page*** | |
| Navigates to NorthSTAR homepage URL | NorthSTAR homepage is displayed with Login area  Slide 1.1 |
| New Users Register for new account. “Click on Register New Organization” | Register new organization page displayed  Slide 1.2/1.3 |
| External User logs into NorthSTAR homepage with proper credentials | Home screen is displayed  Slide 1.4 |
|  | |
| ***Home Page*** | |
| ***Purpose:***  This page is used to view a list of Tasks, Alerts, Online Forms, Forms In Progress, and Forms Submitted for a User in the RBDMS system.  The Home page has multiple sections. View access to these sections is controlled by a tab menu that defaults to the My Tasks tab. Each of these sections is described in more detail below. | |
| Search criteria is entered into upper right search box and drop-down type is selected | Returns records to data grid based on search criteria |
|  | |
| ***Home Menu Items*** | |
| ***Item*** | ***Description*** |
| My Tasks link | This link displays the My Tasks table. Training slide 1.13 |
| Tasks Link | Displays the tasks table |
| Alerts Link | This link displays the Alerts table. |
| Online Forms Link | This link displays the Online Forms table. The link is hidden if the User does not have the Internal All Forms Submitter or All Forms Reviewer security assignment. |
| Forms in Progress Link | This link displays the Forms In Progress table. The link is hidden if the User does not have the Internal All Forms Submitter, All Forms Completeness Reviewer, or All Forms Reviewer security assignment. |
| Forms Submitted Link | This link displays the Forms Submitted table. The link is hidden if the User does not have the Internal All Forms Submitter, All Forms Completeness Reviewer, or All Forms Reviewer security assignment. |
|  | |
| ***Table Commands – Available above each Table*** | |
| ***Command*** | ***Description*** |
| Advanced Filtering | Toggles visibility of a filter row above the columns. Enter text and select a filter option to view a subset of the data in a table. |
| Actions | Performs the action listed for the table. Each section has distinct actions available as described below in more detail. |
| Search | Searches the data in the table. Each table allows distinct search options described below in more detail. |
| Gear Icon | Displays all the columns available for a table. Columns can be hidden or shown. Columns that are Initially hidden can be made visible. |
|  | |
| ***My Tasks and Tasks*** | |
| The following commands are available for these tables:   * **Actions (Add Task)** - Displays the Create Task page in Edit Mode. * **Actions (Export - Excel)** - Generates an Excel export of the table. * **Actions (Export - PDF)** - Generates a PDF export of the table. * **Search** - Searches the table on the Task Name and Organization columns.   The table below describes the fields in the My Tasks & Tasks tables.   * The My Tasks table is filtered to display tasks assigned to the User and unassigned tasks for any workgroup they are an active member. Completed tasks are filtered out and the table is sorted by Due Date, ascending. * The Tasks table displays tasks that are assigned to all the Users and workgroups. The table is filtered to exclude completed tasks and is sorted by Due Date, ascending. | |
| Task Name | Name of the task. |
| Form Name | Name of the form associated with the task. This column is initially hidden. Selecting the link displays the Form details in Read mode in a new browser tab. |
| Organization | Name of the organization. Selecting the link displays the Organization Detail page in Read mode. |
| Status | Status of the task. |
| Workgroup | Workgroup the task is assigned to. This is a link if the logged in User is currently part of the workgroup. Selecting this link displays the Workgroup Detail page. |
| Assigned to | Person the task is assigned to. Selecting this link displays the Person Detail page. |
| Due Date | For a manual task, the creator of the task and an Internal User with sufficient privileges can update the due date. For a task generated by the system, an Internal User with sufficient privileges can change the due date. |
| Created Date | Date the task was created. This column is initially hidden. |
| Created By | User who created this task. This column is initially hidden. |
| Actions (Re-assign Task) | Displays a Re-Assign Task dialog with fields Assigned To and Comments in edit mode.  Select Cancel to cancel and close the dialog. Select Save to reassign the task to the new User selected in the Assigned To field.  This action menu item will only be visible when the task is In Progress and it is only available to the assigned User or agency manager. |
| Actions (Claim Task) | This action assigns the task to the current User. However, the task stays assigned to the workgroup where it was created by the system. |
| Actions (Unclaim Task) | This action un-assigns the task from the current User. Another User from the same workgroup can now claim the task. The task stays assigned to the workgroup where it was created by the system.  This action menu item will only be visible when the task is already claimed by a User. It is only available to the assigned User or agency manager. |
|  | |
| ***Alerts*** | |
| This table displays the alerts created for the logged in User. The following commands are available for this table:   * Actions (Mark Viewed) - Updates the status to Viewed for the alerts selected. * Actions (Delete) - Updates the status to Deleted for the alerts selected. A warning message is displayed confirming the delete. Select No to cancel and close the dialog. Select Yes to delete the alert. * Actions (Export - Excel) - Generates an Excel export of the table. * Actions (Export - PDF) - Generates a PDF export of the table. * Search - Searches the table on the Message and Status columns.   The table below describes the fields in the Alerts table. The Status filter is set to display alerts with a status of New. The table is initially sorted by Date in descending order. | |
| Select Checkboxes | Select the checkbox in the column heading to check all checkboxes or select multiple checkboxes in the table. Select the Action - Mark Viewed or Delete at the top of the table to change the status for all the alerts selected. The checkbox does not need to be selected if using the row actions commands. |
| Date | Date that the alert was generated. |
| Severity | Severity of the alert. The severities are Critical, Minor, and Informational. The count of new alerts is displayed on the Home button. (See the help for RBDMS Main Console for more details.) |
| Message | A description of the alert. |
| Status | Status of the alert can be New, Viewed, or Deleted. |
| Actions(Marked Viewed) | Updates the status to Viewed for the alert on that row. |
| Actions(Delete) | Updates the status to Deleted for the alert on that row. Displays a confirmation dialog. Select No to cancel and close the dialog. Select Yes to change the status of the alert. |
|  | |
| ***Online Forms*** | |
| This table displays all the active and inactive forms. Users can create a new instance of an active form. The following commands are available for this table:   * Search - Searches the table on the Form Name and Purpose columns.   The table below describes the fields in the Online Forms table. The table is initially sorted on Form Name in ascending order, then by Status with active forms listed above inactive forms. | |
| ***Column Name*** | ***Description*** |
| Form Name | Name of the form. Selecting the link opens a new window with a new instance of the form in Edit mode. Only forms with a status of active have a link. |
| Form Category | Category of the form. |
| Purpose | Purpose of the form. |
| Version | Current active version of the form. |
| Count | Displays a count of instances of the form for all organizations that are currently “In Progress” or “Submitted” and have not been Approved or Rejected. This is not a historical count of submissions. |
|  | |
| ***Forms In Progress*** | |
| This table displays all forms with a Status of Draft, Returned, or Deleted. The following commands are available for this table:   * Search - Searches the table on the Form Name, Organization, and Description columns.   The table below describes the fields in the Forms In Progress table. The table is initially sorted by Form Name. | |
| ***Column Name*** | ***Description*** |
| Form ID | Unique ID of the form. |
| Form Name | Name of the form. Selecting the link opens the partially completed form in Edit mode. |
| Description | The User added description for this instance of the form. |
| Organization | The organization that the form has been created for. Selecting this link displays the Organization Detail page. |
| Last Modified By | User who last modified this form instance. |
| Last Modified Date | Date the form instance was last modified. This column is initially hidden. |
| Form Category | Category of the form. This column is initially hidden. |
| Version | Version of the form. This column is initially hidden. |
| Created By | Version of the form. This column is initially hidden. |
| Created Date | Date the form instance was created. This column is initially hidden. |
| Date Received | Date the form instance was received. This column is initially hidden. |
| Actions (Edit Form) | Opens the form in Edit mode which has not been submitted. |
| Actions (Create Form Duplicate) | Creates a duplicate instance of the selected online form in Draft status. Description for the duplicate instance = <Original form Description> (Duplicate). |
|  | |
| ***Forms Submitted*** | |
| This table displays all forms with a status of Submitted, Approved, or Denied and the associated tasks for each form. The following commands are available for this table:   * Actions (Export - Excel) - Generates an Excel export of the table. * Actions (Export - PDF) - Generates a PDF export of the table. * Search - Searches the table on the Form ID, Form Name, and Description columns.   The table below describes the fields in the Forms Submitted table. The table initially displays forms with a removable filter on status of Submitted and is sorted by Form ID. | |
| ***Column Name*** | ***Description*** |
| Expander | Select the expander to view or hide the nested table of associated tasks for the submitted form. |
| Form ID | Unique ID of the form. |
| Form Name | Name of the form. Selecting the link opens the form in Read mode. |
| Description | The User added description for this instance of the form. |
| Organization | The organization that the form has been created for. Selecting this link displays the Organization Detail page. |
| Status | Status of the Form. |
| Last Modified by | User who last modified this form instance. This column is initially hidden. |
| Last Modified Date | Date the form instance was last modified. This column is initially hidden. |
| Form Category | Category of the form. This column is initially hidden. |
| Version | Version of the form. This column is initially hidden. |
| Created By | User who created this form instance. This column is initially hidden. |
| Created Date | Date the form instance was created. This column is initially hidden. |
| Date Received | Date the form instance was received. This column is initially hidden. |
| Actions (withdraw form) | Updates the form status to Withdrawn for that row. |
|  | |
| ***Associated Tasks Table*** | |
| The table below describes the fields in the Associated Tasks table. The table displays the tasks that are associated with the Form Submitted. The task table is initially sorted by ascending Due Date. | |
| ***Field*** | ***Description*** |
| Task name | Name of the Task. |
| Form Name | Name of the form associated with the task. This column is initially hidden. |
| Organization | Name of the organization. Selecting the link displays the Organization Detail in view only mode. |
| Status | Status of the task. |
| Workgroup | Workgroup the task is assigned to. This is a link if the logged in User is currently part of the workgroup. Selecting this link displays the Workgroup Detail page. |
| Assigned to | Person the task is assigned to. Selecting this link displays the Person Detail page. |
| Due Date | For a manual task, the creator of the task and an Internal User with the appropriate security assignment can update the due date. For a task generated by the system, an Internal User with the appropriate security assignment can change the due date. |
| Created Date | Date the task was created. This column is initially hidden. |
| Created By | User who created this form instance. This column is initially hidden. |
| Actions(re-assign task) | Displays a Re-Assign Task dialog with fields Assigned To and Comments in Edit mode.  Select Cancel to cancel and close the dialog. Select Save to reassign the task to the new User selected in the Assigned To field.  This action menu item will only be visible when the task is In Progress and it is only available to the assigned User or agency manager |
| Actions (Claim Task) | This action assigns the task to the current User. However, the task stays assigned to the workgroup where it was created by the system. |
| Actions (Unclaim Task) | This action un-assigns the task from the current User. Another User from the same workgroup can now claim the task. The task stays assigned to the workgroup where it was created by the system.  This action menu item will only be visible when the task is already claimed by a User. It is only available to the assigned User or agency manager. |

**External Log-In**

**Task Name: Login and Basic Home Page Navigation**

(Training Module 2, Power Point NorthSTAR Basic Function slide file)

|  |  |
| --- | --- |
| ***Home Page*** | |
| Purpose  This page is used to view a list of Alerts, Online Forms, Forms In Progress, and Forms Submitted for a User in the RBDMS system.  The Home page has multiple sections. View access to these sections is controlled by a tab menu that defaults to the Alerts tab. Each of these sections is described in more detail below. | |
| ***Home Menu Items*** | ***Short Description*** |
| Alerts link | This link displays the Alerts table. |
| Online Forms link | This link displays the Online Forms table. The link is hidden if the User does not have the Organization All Forms Submitter security assignment. |
| Forms In Progress link | This link displays the Forms In Progress table. The link is hidden if the User does not have the Organization All Forms Submitter security assignment. |
| Forms Submitted link | This link displays the Forms Submitted table. The link is hidden if the User does not have the Organization All Forms Submitter security assignment. |
| My Organization link | This link displays the Organization Detail page with the User’s organization. |

|  |  |
| --- | --- |
| ***Table Commands*** | |
| The table below describes the commands above each table on this page and actions taken by the system if the User clicks/selects the command.. | |
| ***Command*** | ***Description*** |
| Advanced Filtering | Toggles visibility of a filter row above the columns. Enter text and select a filter option to view a subset of the data in a table. |
| Actions | Performs the action listed for the table. Each section has distinct actions available as described below in more detail. |
| Search | Searches the data in the table. Each table allows distinct search options described below in more detail. |
| Gear Icon | Displays all the columns available for a table. Columns can be hidden or shown. Columns that are Initially hidden can be made visible. |

|  |  |
| --- | --- |
| ***Alerts*** | |
| This table displays the alerts created for the logged in User. The following commands are available for this table:   * Actions (Mark Viewed) - Updates the status to Viewed for the alerts selected. * Actions (Delete) - Updates the status to Deleted for the alerts selected. A warning message is displayed confirming the delete. Select No to cancel and close the dialog. Select Yes to delete the alert. * Actions (Export - Excel) - Generates an Excel export of the table. * Actions (Export - PDF) - Generates a PDF export of the table. * Search - Searches the table on the Message and Status columns.   The table below describes the fields in the Alerts table. The Status filter is set to display alerts with a status of New. The table is initially sorted by Date in descending order. | |
| ***Column Name*** | ***Description*** |
| Select Checkboxes | Select the checkbox in the column heading to check all checkboxes or select multiple checkboxes in the table. Select the Action - Mark Viewed or Delete at the top of the table to change the status for all the alerts selected. |
| Date | Date that the alert was generated. |
| Severity | Severity of the alert. The severities are Critical, Minor, and Informational. The count of new alerts is displayed on the Home button. (See the help for RBDMS Main Console for more details.) |
| Message | A description of the alert. |
| Status | Status of the alert can be New, Viewed, or Deleted. |
| Actions (Mark Viewed) | Updates the status to Viewed for the alert on that row. |
| Actions (Delete) | Updates the status to Deleted for the alert for that row. Displays a confirmation dialog. Select No to cancel and close the dialog. Select Yes to delete the alert. |

|  |  |
| --- | --- |
| ***Online Forms*** | |
| This table displays all the active and inactive forms. Users can create a new instance of an active form. The following commands are available for this table:   * Search - Searches the table on the Form Name and Purpose columns.   The table below describes the fields in the Online Forms table. This table is sorted by form name with all active forms listed above any inactive forms. Forms which are no longer active will not have any links. The table is initially sorted on Form Name in ascending order. | |
| ***Column Name*** | ***Description*** |
| Form Name | Name of the form. Selecting the link opens a new window with a new instance of the form in Edit mode. |
| Form Category | Severity of the alert. The severities are Critical, Minor, and Informational. The count of new alerts is displayed on the Home button. (See the help for RBDMS Main Console for more details.) |
| Purpose | A description of the alert. |
| Version | Status of the alert can be New, Viewed, or Deleted. |
| Count | Updates the status to Viewed for the alert on that row. |

|  |  |
| --- | --- |
| ***Forms in Progress*** | |
| This table displays all forms with a Status of Draft, Returned, or Deleted for the User’s organization. The following commands are available for this table:   * Search - Searches the table on the Form Name and Description columns.   The table below describes the fields in the Forms In Progress table. The table is initially sorted by Form Name. | |
| ***Column Name*** | ***Description*** |
| Form ID | Unique ID of the form. |
| Form Name | Name of the form. Selecting the link opens the partially completed form in Edit mode. |
| Description | The User added description for this instance of the form. |
| Status | Status of the form. |
| Last Modified By | User who last modified this form instance. |
| Last Modified Date | Date the form instance was last modified. This column is initially hidden. |
| Form Category | Category of the form. This column is initially hidden. |
| Version | Version of the form. This column is initially hidden. |
| Created By | User who created this form instance. This column is initially hidden. |
| Created Date | Date the form instance was created. This column is initially hidden. |
| Date received | Date the form instance was received. This column is initially hidden. |
| Actions (Edit Form) | Opens the form in Edit mode which is not submitted and partially completed. |
| Actions (Delete) | Updates the form status to Deleted for that row. |
| Actions (Create form Duplicate) | Creates a duplicate instance of the selected online form in Draft status. Description for the duplicate instance = <Original form Description> (Duplicate). |

|  |  |
| --- | --- |
| ***Forms Submitted*** | |
| This table displays all the forms with a status of Submitted, Approved, or Denied for the User’s organization. The following commands are available for this table:   * Actions (Export - Excel) - Generates an Excel export of the table. * Actions (Export - PDF) - Generates a PDF export of the table. * Search - Searches the table on the Form ID, Form Name, and Description columns.   The table below describes the fields in the Forms Submitted table. The table initially displays forms with a status of Submitted with a removable filter and is sorted by Form ID. | |
| ***Column Name*** | ***Description*** |
| Form ID | Unique ID of the form. |
| Form Name | Name of the form. Selecting the link opens the form in Read mode. |
| Description | The User added description for this instance of the form. |
| Status | Status of the form. |
| Last Modified By | User who last modified this form instance. |
| Last Modified Date | Date the form instance was last modified. This column is initially hidden. |
| Form Category | Category of the form. This column is initially hidden. |
| Version | Version of the form. This column is initially hidden. |
| Created By | User who created this form instance. This column is initially hidden. |
| Created Date | Date the form instance was created. This column is initially hidden. |
| Date received | Date the form instance was received. This column is initially hidden. |
| Actions (View Online Form) | Opens the form in Read mode that is completed and submitted. |

**NorthSTAR Training – Bonding Key Points**

**Task Name: Issue Bond**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Navigates to NorthSTAR homepage URL | NorthSTAR homepage is displayed with Login area  Training slide |
| User clicks on Online Forms  Training Slide | Form Choices open  Training slide |
| Bond Information | Form Opens  Training slide |
| Operator Information | Information Form Opens |
| Bond Information | Bond information opens |
| Instrument information | Bond form is displayed |
| Action- add instrument | Help for current page is displayed |
| Transaction | Transaction data is displayed |
| Well / facility info | Form opens |
| Upload document | Form opens |
| Form submit | Form opens |
| Acknowledgement- check I certify box |  |
| Confirmation | Display opens |

**Task Name: Approve Bond**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
|  | Training slide |
| Navigate to and review Form 2 data  Training Slide | Form 2 is displayed  Training slide |

**Task Name: Review Bond Detail**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Login to NorthSTAR | NorthSTAR homepage is displayed  Training slide |
| User clicks on explore data  Training Slide | Drop down is displayed  Training slide |
| User selects bonds | A list of bonds is displayed  Training slide |
| Select bond number | Opens bond detail |
| Bond detail | Bond Info |

**Task Name: Modify bond data**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Select bond | Bond opens  Training slide |
| Click on Form Info  Training Slide | Form Info opens  Training slide |
| Bond Info | Training slide |
| Instrument info | Page opens |
| select | Opens view |
| Click on actions | Select action |
| Add or modify information |  |

**Task Name: Approved - Modify bond data**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Select bond | Bond opens  Training slide |
| Click on Form Info  Training Slide | Form Info opens  Training slide |

**Task Name: Flag Bond Concern**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Select bond | Bond opens  Training slide |
| Add description  Training Slide | Form Info opens  Training slide |
| Select next |  |
| Select from Instrument info |  |
| Add description | Make any necessary notes |

**Task Name: Internal – Release Bond**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Explore data bond | Bond opens  Training slide |
| Action  Training Slide | Training slide |
| Release bond request | Form opens |
| Upload Document |  |
| Action | Add new |
| Add Comments |  |
| Certify |  |
| Submit | Confirmation is returned |

**Task Name: Approve – Release Bond**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
|  |
|  |  |

**Task Name: External User Submission Submit Bond - Individual Indemnity**

(Training Module 3, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| User logs into NorthSTAR with proper credentials | Landing screen is displayed |
| User accesses Bond Management screen from the Explore Data menu | Bond Management screen is displayed |
| User selects “Add New Bond” from Actions list |  |
| User Selects individual bond, enters a description and continues | Bond form is displayed |
| User completes individual indemnity bond form. | 1. NorthSTAR displays confirmation message that the form has been submitted successfully and the form is under review by the Division. 2. NorthSTAR creates tasks for District Offices and HQ. |

**NorthSTAR Training – Entity Key Points**

**Task Name: External Register New Organization**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| External user opens web browser, navigates to NorthSTAR login page | NorthSTAR login page displayed |
| Select Register New Organization | Register New Organization form displayed |
| Complete form, do not check accept Privacy Notice box, Recaptcha, Click Continue |  |
| Complete form, check accept Privacy Notice box, Recaptcha, Click:Continue |  |

**Task Name: Internal Register New Organization**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Internal user opens web browser, navigates to NorthSTAR login page | NorthSTAR login page displayed |
| Navigate to online Forms | Displays list of forms |
| Select Organization Questionnaire (scroll list or search) | Displays Organization Questionnaire Form (step 1) |
| Complete form Click: Save & Continue | Displays Organization Questionnaire Form  (step 2, steps 1-9 available on form navigation window) |
| Complete Step 2 on Form |  |
| Click Gray "Org Addresses" bar, Click Actions, Click Add Address, Complete Address form Click Save | Address Popup window displayed, Org form information updates after save |
| Click Gray "Org Phone Numbers" bar, Click Actions, Click Add Phone Number, Complete Phone Number form Click Save | Phone Numbers Popup window displayed, Org form information updates after save |
| Click Gray "Org Email Addresses" bar, Click Actions, Click Add Email Address, Complete Email Address form Click Save | Email Address Popup window displayed, Org form information updates after save |
| Click Gray "Org Associated Organizations" bar, Click Actions, Click Add Associated Organization, Complete Associated Organizations form Click Save | Associated Organization Popup window displayed, Org form information updates after save |
| Click Next | Displays Organization Questionnaire Form (step 3) |
| Click: Actions, Click Add Person | Displays Person Info form |
| Click Peron does not exist | Person Info From changes to input new person |
| Complete person info form, Click Save | Newly created person should appear in people list box |
| Click: Actions, Click Add Person | Displays Person Info form |
| Leave person Already Exists in RBDMS button, Select a person in the system Click Save | Displays Successfully loaded existing person message |
| Click: Continue | Displays people list box now includes new person and existing contact just added |
| Click: Next | Displays Document Upload form |
| Click Actions, Click Add New | Document Upload Popup window displayed |
| Complete form, Click Browse, use file explorer to navigate to and select a file Click Open | Selected file displays on Document Upload Popup |
| Click: Upload | Uploaded Document now displays in Uploaded Documents list |
| Click: Next | Displays Form Submit page |
| Click: I hear by certify statement, Click: Preview Submission Summary | Displays Summary forms with option to Edit |
| Click: Submit | Displays Confirmation form has been submitted |
| Click: Close | Return to Home landing page |
| Click: Tasks | Displays Task List page |
| Navigate to Task Name |  |

**Task Name: Login Page Actions**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Internal Login-Landing | Brings user to Home Page |
| External Login-Landing | Brings user to Home Page |
| External Login-Set PW |  |
| External Login-Change PW |  |

**Task Name: Create External Entity and Modify Entity**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| External (NorthSTAR-admin) Create Entity | Explore data, Entities |
| New entity login (change PW) |  |
| External(entity-admin) Create Entity |  |
| Deactivate Entity/User |  |
| Deactivate Entity/User login attempt |  |
| External create already existing entity |  |

**Task Name: Create Internal Entity and Modify Entity**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Internal (entity admin) Create External User |  |
| Internal Approve -External NorthSTAR Admin |  |
| Internal (entity admin) Approve -External created/modified |  |
| Internal (entity admin) Modify External User |  |
| Internal Deactivate External Entity/User  Deactivate Entity/User login attempt |  |

**Task Name: Modify Admin**

(Training Module 2, Power Point NorthSTAR Bonding slide file)

|  |  |
| --- | --- |
| ***User Action*** | ***NorthStar Response*** |
| Modify internal Admin |  |
| Modify External admin |  |