NorthSTAR User Manual
Organization Questionnaire

Table of Contents

NorthSTAR Basic Functionality

This section reviews basic functionality of all forms and tools available in NorthSTAR. Each manual includes this information to encourage proper understanding of all basic functions.
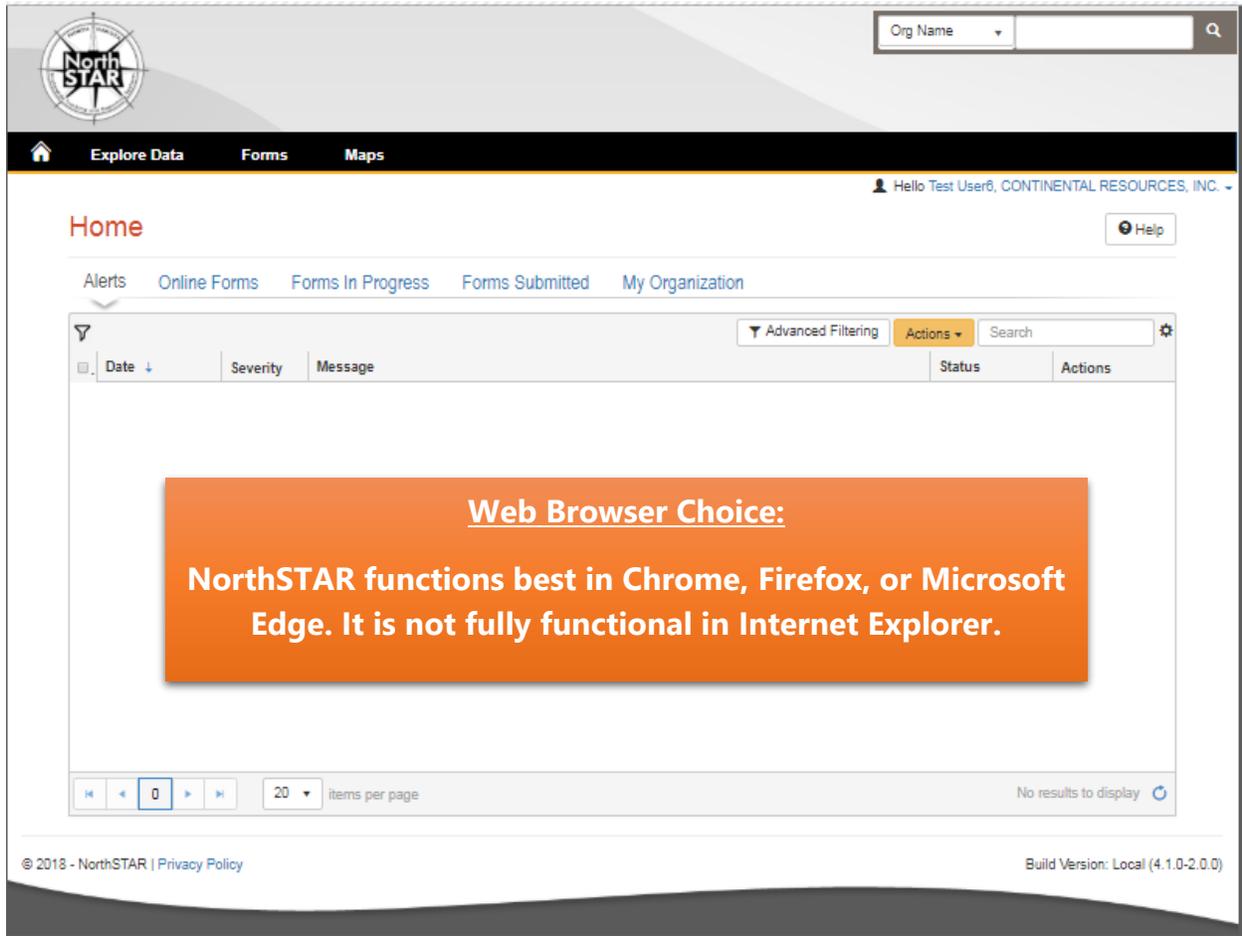
Figure 1: NorthSTAR Homepage

Tour of Home Screen Navigation – Once logged in; every operator will see the home screen (Figure 1) when logged into NorthSTAR:

> **Search** - A quick search bar is available on your homepage in the upper right-hand corner. This search will apply to which ever selection was made in the dropdown menu to include: Organization Name, API, File Number, Bond Number, Last Name or First Name.

> **Home** – Selecting the home image resets your browser window to the homepage; which will always open to Alerts.

Explore Data – Allows you to view data and information that you have entered or submitted through NorthSTAR. You can only view information under the organization that you are logged into.

Forms – Selecting "Forms" and then "Online Forms" will populate a grid listing all forms that you have security permissions to submit.

Maps – This will navigate over to the North Dakota Oil and Gas Division's GIS Map Server.

Alerts – Alerts will show here for any actions that have been taken related to a form you have submitted or someone in your workgroup has submitted noting that the form has been approved, declined, or returned to you with edits needed.

Online Forms – This will show a listing of all forms that are available for you to submit based on your security permissions.

Forms in Progress – This page will show all forms in progress under your organization that you have security permissions to view. Forms in this section are still available to edit or duplicate as they have not been submitted to the ND Oil and Gas Division yet. Note that forms in progress may have a default filter set to only view "Drafts" – Should you be looking for a form with a status of "Returned" or "Declined" you will need to clear/reset the filter to see all forms.

Forms Submitted – This page will show all forms that have been submitted to the ND Oil and Gas Division for review or decision. Forms in this section will not be available to edit or duplicate unless you request it to be returned. Check the advanced filters to ensure no default filter has been set in place if you are unable to find a specific form. You will only be able to view forms that you or your workgroup have submitted.

My Organization – This page will take you to the Organization Detail page for the organization you are currently logged in under. If you submit data for multiple entities you will need to log out, and log in again selecting the organization that you plan to submit data for.

User Profile – The User Profile line displays the current user logged in and the corresponding company associated with the user.

Required Information – Will be denoted by a red asterisk (*****). The applicant is encouraged however to complete as many fields as possible. If there are sections you believe should be required or are unsure of what to enter contact the North Dakota Oil and Gas Division (701-328-8020). **Fields listed in orange in this user manual are required.**

Greyed Out Fields/Dropdown Not Functioning – Fields that are greyed out or where the dropdown does not function are for portions of the form that the North Dakota Oil and Gas Division staff will populate once the form is submitted. In the case of Transfers, it is because another entity will need to log in and populate that information.

Figure 2: *Image of Greyed out fields outlined in yellow.*

Error Messages – You will receive an error message at the top of the page if information was missed or entered incorrectly. These messages are hyperlinked and will take you directly to the portion of the page once clicked. You may also receive an error message in the form of a red letter "**X**" next to the step you have completed under "Form Navigation". This indicates information was entered incorrectly or information is missing from this section. Go back and correct the information to clear the error. You will not be able to submit the form until all mandatory sections and fields are completed adequately.

Completed Sections - When all fields and sections have been completed adequately, a green check mark " ✔ " will appear by each section under the "Form Navigation" banner. This will indicate that you may submit the application. Note that you *must* click the "Submit" button in order to properly complete a form.

Information Tool Tip – As shown in Figure 3 on the right, clicking on a tool tip will provide you with more information, entry tips, or other guidance on what is required for the selected field.
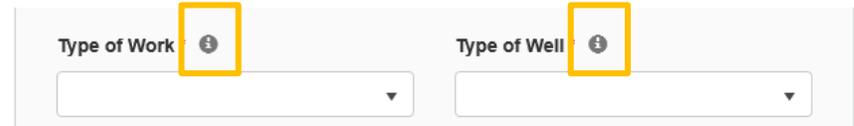
Figure 3: *Information tool tip outlined in yellow.*

Picker Grids – Some forms require that you select wells from a grid and associate them with the form as shown in Figure 4 on the right. You can do this by searching for the well in the top grid (Step 1.). Select the wells you would like to include (Step 2.). Use the down arrow to drop selected wells into the form (Step 3.). Reverse these steps if you have selected the incorrect well to remove the well from the form.

Advanced Filtering – The advanced filtering feature (Figure 4 - Step 1.) will show up in many locations in NorthSTAR such as forms in progress, finding wells, filtering wellbore information and anywhere else there is a table with the advanced filtering option. *TIP: Always open and select "Advanced Filtering" to see if any filters have been set as a default - specifically when viewing "Forms in Progress" or "Forms Submitted".* Once open, any column can be filtered by typing all or portions of text into the filter box. Select the filter

icon " ▼ "to choose whether you would like the filter to be: equal to, not equal to, starts with, contains, does not contain, ends with, is null, it not null, is empty, is not empty, has no value, or has value.
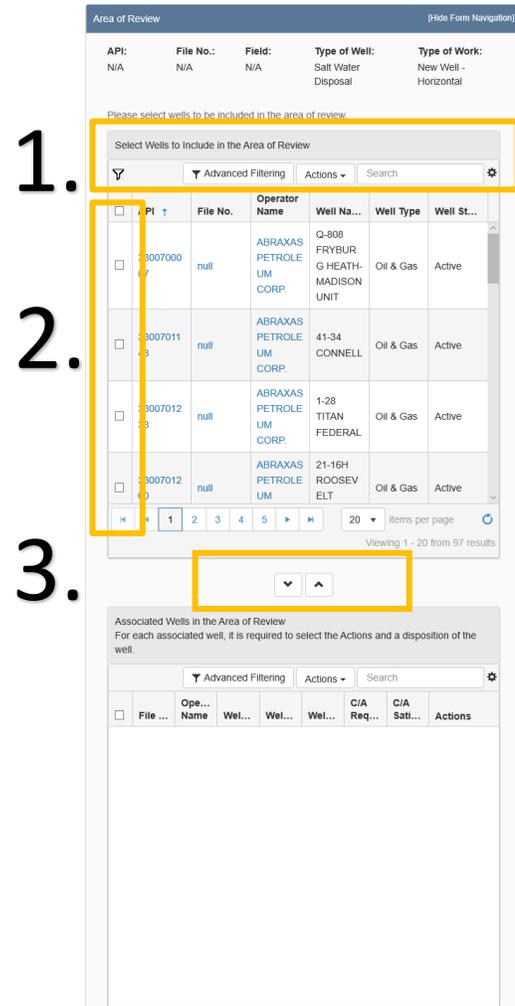
Figure 4: *Picker Grid Guide showing advanced filtering (1), selection of wells (2), and selection arrows (3).*

Gear Icon - The gear icon is located at the top of each grid. This icon allows the user to select/deselect the visible columns in the specific grid as shown in Figure 5. *TIP: The table text does not shrink to fit, the more columns chosen the more difficult it may be to read. If needed, use the export function to see the full information details of all the columns.*
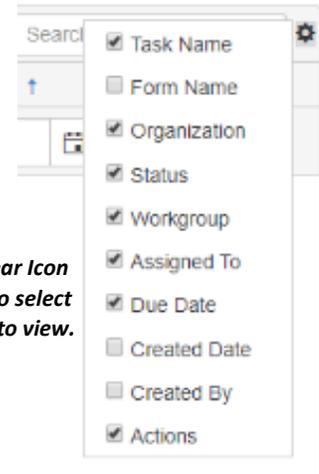
Figure 5: Gear Icon showing how to select more columns to view.

Grid Action – The "Actions" dropdown menu is located on the top of each grid (Figure 6 - Step 1). Actions selected will affect all information in the grid below. Typical actions available would be; edit, add a person, export to excel, export to pdf, and many other options depending on the grid. If exporting to excel or pdf: all information possible will be exported and you will need to re-filter the information once in excel.
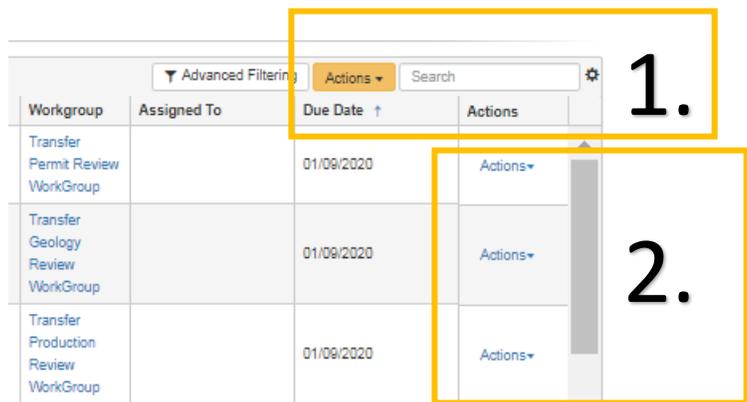
Figure 6: Sample of what Grid Action vs Row Action looks like.

Row Action – Row actions allow the user to modify information in a specific row without impacting the entire grid. Once you have added a line of information into the grid and need to edit or take action, select "Actions" next to the desired row as shown above in Figure 6 (Step 2).

Accordion Screen Function – If you see a small arrow on any heading bar (Figure 7) this will allow you to open and close sections of the form to streamline the visible information. Click the arrow to open or close the section.
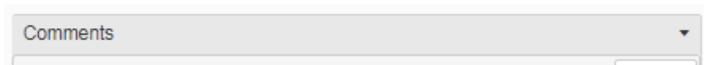
Figure 7: Image of Accordion Screen Function

Column Sort - Each colum in a grid can be sorted in alphabetical order, A-Z or Z-A, or can be sorted in ascending to descending order by clicking on the column header.

Organization Questionnaire: Global Fields and Functions

This section outlines the individual steps as you fill out an Organization Questionnaire.

Security Permissions

Access to submit an Organization Questionnaire is only available to those with the below security permissions.

- **NorthSTAR Admin** – Ability to Create, Read, Update, and Delete
- **Entity Manager** – Ability to Create, Read, Update, and Delete
- **Entity Submitter** – Ability to Create, Read, Update
- **Entity Read Only** – Ability to Read

The NorthSTAR Admin is the only person who can view or edit security permissions.
To view Security Permissions:

- *Click on My Organization*
- *Click on Associated People*
- *Click on the hyperlinked name of the person you would like to review*
- *Click on Summary*
- *Click on Security*
- *Check permissions that apply and click Save*

TIP: Users with security permissions for a specific NorthSTAR form will be able to - at a minimum - read all forms in progress or submitted of that specific form type if they are affiliated with the Organization the form is being submitted under.

Step 1: Form Information

The Form Information page is used to indicate if operations are in North Dakota and to provide a brief description of the organization.

Fields and Functions:
Form Name: Will default to the form you have selected in NorthSTAR.
Do you currently operate, or intent to operate oil and gas wells or facilities in North Dakota?
Description: Please include pertinent details related to the change you are making to your organization here. (Ex: Adding people, Requesting name change, …)

Form Information	[Hide Form Navigation]
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 North Dakota?

◯ Yes   ⦿ No

Description *

Step 2: Organization

The Organization Information page is used to designate contact details for the Organization being added or edited.

<u>**Fields and Functions:**</u>

Type of Organization: Select from the drop-down menu the legal type of your organization.
Name: Enter the name of your company here that matches the paper Form 2: Organization Report that would be submitted along with this form.
Short Name: If you abbreviate your company you may enter it here.
Web Address
Role(s): Organization Role(s) and Person Role(s) are not the same as security permissions and do not impact what type of information you can submit in NorthSTAR. This section is a tagging mechanism you can utilize for quick sorting.
Organization Addresses: To enter an address, open the address bar, select Actions – Add Address. Enter all required fields as noted by the red asterisk.
Organization Phone Numbers: To enter a phone number, open the phone number bar, select Actions – Add Phone Number. Enter all required fields as noted by the red asterisk.
Organization Email Addresses: To enter an email address, open the address bar, select Actions – Add Email Address. Enter all required fields as noted by the red asterisk.
Associated Organizations: To link another organization from NorthSTAR with your organization, open the Associated Organization bar, select Actions – Add Associated Organization. Select the Relationship type from the option below and choose the organization:
- Contractor
- SubContractor
- Merged with
- Subsidiary

Organization   [Hide Form Navigation]

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

Type of Organization *

Unknown ▼

Name *

CONTINENTAL RESOURCES, INC.

Short Name

CONTINENTAL RESOURCES

Web Address

Role(s)

Pipeline Operator ✕ Gas Gatherer ✕ Oil Marketer ✕ Gas Marketer ✕ Permittee ✕

Lease Operator ✕ Permit Agent ✕ Injection Operator ✕ Oil Field Excavator ✕

Organization Addresses ▼

Actions ▾ ⚙

Type	Address	Primary	Actions
Mailing Address	PO BOX 268870, OKLAHOMA CITY, OK 73126, USA	Y	Actions▾

Organization Phone Numbers ▶

Organization Email Addresses ▶

Associated Organizations ▶

Step 3: People

The People page is used to give more information about the people currently related to the organization or to add additional people to your organization account.

There are two sections, the first will display the successfully loaded amount of people currently related to the organization. Click "continue".

People	[Hide Form Navigation]
Successfully loaded 16 people currently related to the organization.	
Continue	
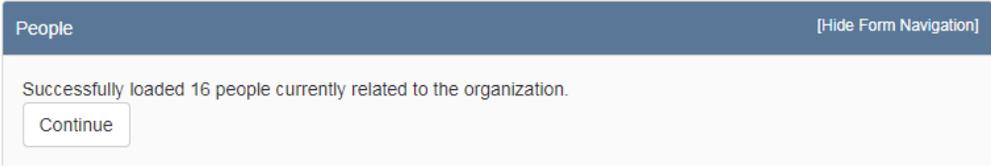
The second section will display the Name, RBDMS User status, Admin status, and available actions for each user. To add a person, select "Actions" then "Add Person" from the pull-down button at the top of the section. If no one needs to be added, select "Next" at the bottom of the page to continue.

People			[Hide Form Navigation]

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

People *

			Actions ▾
Name	**RBDMS User**	**Admin**	**Actions**
ExtOp3 APDManager	Y	Y	Actions▾
ExtOp3 APDReadOnly	Y	Y	Actions▾
ExtOp3 APDSubmitter	Y	Y	Actions▾
Shannon Harrison	Y	Y	Actions▾
Machelle Lynn	Y	Y	Actions▾
ExtOp3 NorthSTARAdmin	Y	Y	Actions▾
Linda Price	Y	Y	Actions▾
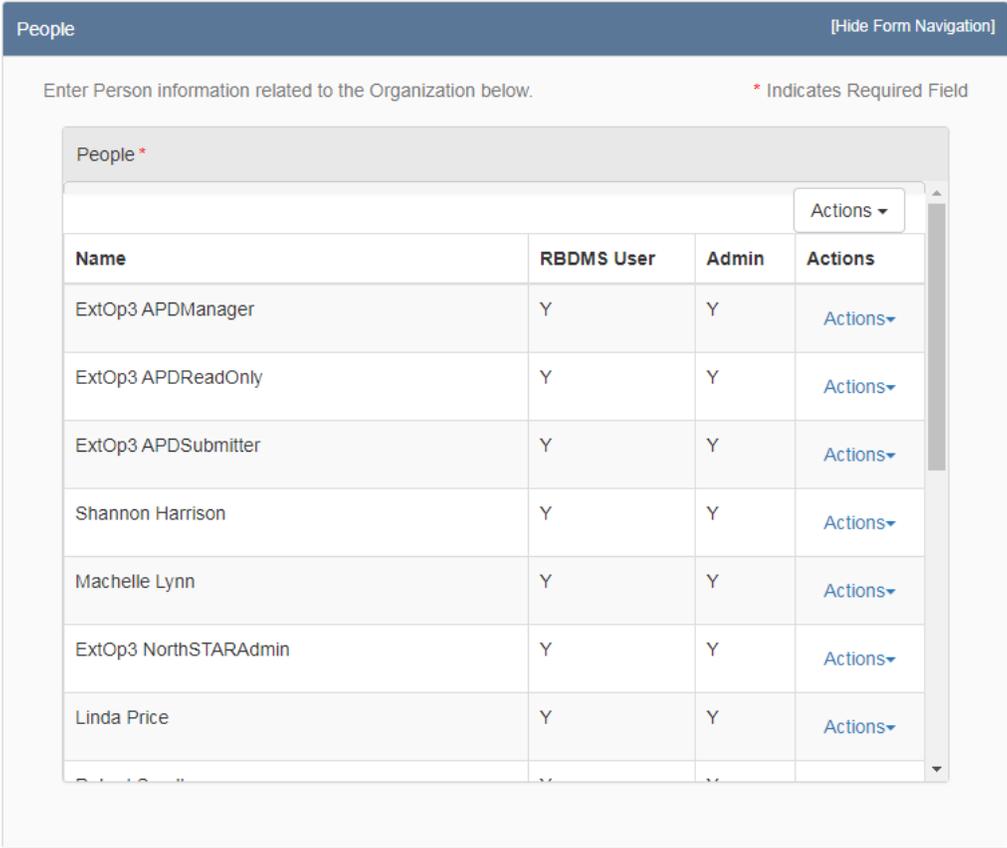
If the person to add already exists in NorthSTAR, select their name from the pull-down menu "Find Person" and select their relationship types and attributes. Click "Save" when finished to add.

RBDMS User – Creates their account in NorthSTAR.
Admin – Sets them up at a NorthSTAR Administrator. If you do not want them to be set up as an administrator but need to select other security permissions, see below.

The NorthSTAR Admin is the only person who can view or edit security permissions.
To view Security Permissions:
- *Click on My Organization*
- *Click on Associated People*
- *Click on the hyperlinked name of the person you would like to review*
- *Click on Summary*
- *Click on Security*
- *Check permissions that apply and click Save*

If the person to add does not exist in NorthSTAR, select the corresponding radio button, as seen below, and fill in the applicable informational fields. Click "Save" when finished to add. After reviewing the list, select "Next" at the bottom of the page to continue.

TIP: Do not forget to open the Addresses and Phone Numbers fields and complete all required information when adding a new user!

Person Info   [Hide Form Navigation]

* Indicates Required Field

○ **Person Already Exists in NorthSTAR**   ◉ **Person Does Not Exist in NorthSTAR**

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

Addresses   ▶

Phone Numbers   ▶

Email

Relationship Types *   **Relationship Attributes**

Select Relationship Types...   ☐ RBDMS User   ☐ Admin

Role(s)

Select Roles...

Cancel   Save

Step 4: Document Upload

Used to upload documents applicable to the work being done, documents to support a request for waiver, etc.
Document Types Accepted: PDFs, TIFFs, JPEGs, GIFs, PNGs, etc.
We prefer no .zip files and all documents are submitted in .pdf format.

Attaching a New Document:
 **As a general guideline separate documents and upload them individually for easer navigation post submittal.
1. At the top of the grid, click the "Actions" button and select "Add New".
2. Click the circle by the "Upload New Document" statement for new attachments.
3. Choose to either have the attachments marked "Internal Only" or "Request Confidentiality" or both by clicking the box next to either statement.
4. **Type:** From the pull-down menu, you may choose from an assortment of document types listed below:
   - Bankruptcy Document
   - Contact Questionnaire
   - Designation of Agent
   - Emergency Contact Form
   - Generic Correspondence
   - Name Change or Merger Document
   - Organization Questionnaire
5. **Relevant Date:** Input the date of the submittal of the application.
6. **Description:** Input any additional description for the attachment.
7. **Filename** (Attaches the document):
   - First, click the "Browse" in order to navigate to the desired attachment.
   - Next, click the desired attachment inside the pop-up window.
   - Then, click the "Open" button.
   - Wait for the attachment to download.
   - Lastly, click the "Upload" button in the "Document Upload" pop-up window.
8. Once all attachments have been uploaded, click "Save" at the bottom of the page.

Attaching a document Existing in NorthSTAR
1. Click the circle by the "Associate Existing NorthSTAR Document" in order to utilize attachments that have been stored in NorthSTAR.
2. **Document ID:** From the pull-down menu, choose the appropriate attachment to upload.
3. Click "Upload".
4. Once all attachments have been uploaded, click "Save" at the bottom of the page.

Document Upload ✕

* Indicates Required Field

◉ Upload New Document   ○ Associate Existing NorthSTAR
                                  Document

☐ Internal Only   ☐ Request Confidentiality

Category

| Well | ▾ |

Type *

| | ▾ |

Relevant Date *   ❓

| | 📅 |

Description *

| |

Filename *   ❓

| Browse |
| 🗎 |

Cancel   Upload

Document Upload ✕

* Indicates Required Field

○ Upload New Document   ◉ Associate Existing NorthSTAR
                                  Document

Document ID *

| | ▾ |

Cancel   Upload

Document Upload   [Hide Form Navigation]

API:	File No.:	Field:	Type of Well:	Type of Work:
N/A	N/A	N/A	Oil & Gas	New Well - Horizontal

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 Date ↓	Uploaded By	Type	Description	Filename	Actions
11/08/2019	ExtOp1 APDManager	Gas Capture Plan	GCP	GCP.pdf	Actions▾
11/08/2019	ExtOp1 APDManager	Well Completion or Plugging Snapshot	Shoe Detail	Shoe Detail.pdf	Actions▾
11/08/2019	ExtOp1 APDManager	Completion Schematic	Completion Schematic	Shoe Schematic.pdf	Actions▾
11/08/2019	ExtOp1 APDManager	Plats 1) - Well loc plat	Well Location Plat	Well Plot.pdf	Actions▾
11/08/2019	ExtOp1 APDManager	Plats 3) - Cut & Fill Schematic	Spoil Balance and Xsections	Spoil Balance and Xsections.pdf	Actions▾
11/08/2019	ExtOp1 APDManager	Plats 4) - Topo Maps	Location Maps	Location Maps.pdf	Actions▾

Comments   ▼

[   ] [Add]

[Back] [Next] Save

Step 5: Form Submit

*This section is to add comments, enter submitter information, and to preview the submission summary. To add comments, type in the textbox to the left of the yellow "Add" button at the bottom of the comments section. All comments will be display in the space above the textbox. To export comments in Excel or PDF format, select the desired option from the "Actions" pull-down menu on the right side. The comments section can be collapsed by selecting the arrow to the right of the header. Select the check box to fill in the Submitter name. **Submitter Title** must be typed in. Select "Preview Submission Summary" to review all information entered from previous pages. Edit the information if needed then select "Submit" to continue.*

Step 6: Confirmation

*Once submitted you will be taken to the "Confirmation" page which will indicate the for was successfully submitted or will indicate an error if there was a problem with the submission. Your form will be assigned a number that will be shown in **BOLD** text, as seen below.*

Step 7: Review Comments

This information is to be completed by internal Oil & Gas Division Staff.

Step 8: Reviewer Fields

This information is to be completed by internal Oil & Gas Division Staff.

Step 9: Review

This information is to be completed by internal Oil & Gas Division Staff.