NorthSTAR User Manual

Transfer

This function of NorthSTAR is not yet live.

As such the information in the attached user manual is subject to change while the function is being built.

The User Manual will no longer hold this disclaimer, or the *DRAFT* watermark once finalized.

Questions contact oilandgasinfo@nd.gov

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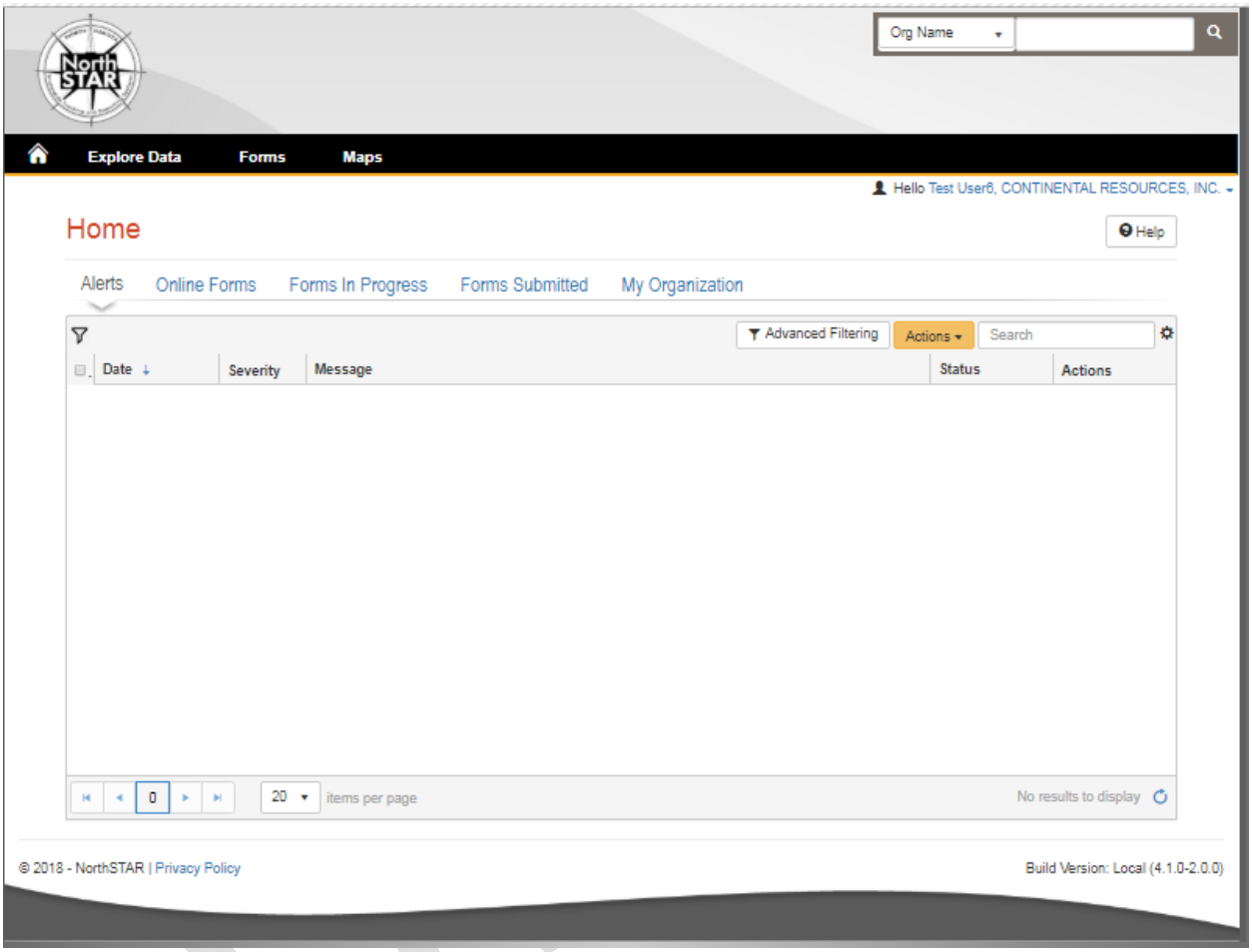
NorthSTAR Basic Functionality

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.



Tour of Home Screen Navigation – Once logged in; every operator will see the below home screen 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 you have made in the drop down 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 – 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 – 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 under your ability to edit or duplicated 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 features 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 you will no longer be able to edit or duplicate unless you request it to be returned to you. 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 is telling you who you are currently logged in under and which company you are working under.

Required Information – Will be denoted by a red asterisk (*). The applicant is encouraged 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.

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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.

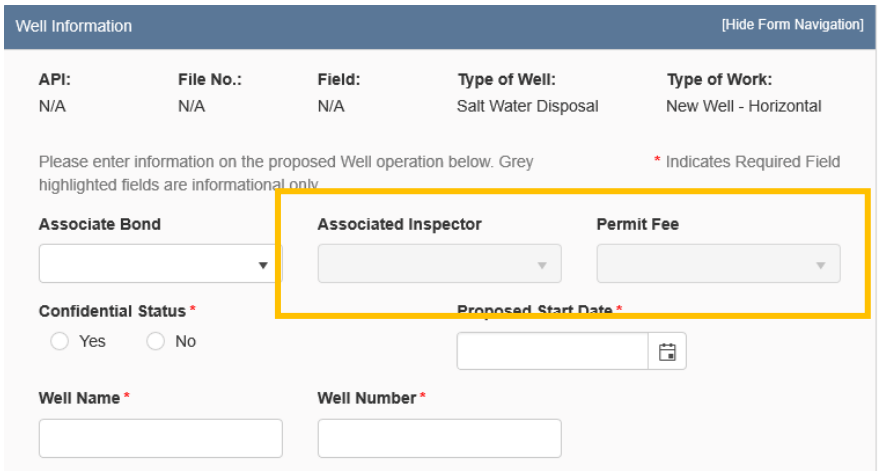

Figure 1: ***Image of Greyed out fields outlined in yellow.***

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 "**X**" next to the step you have completed under "Form Navigation". This can indicate 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 2 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.

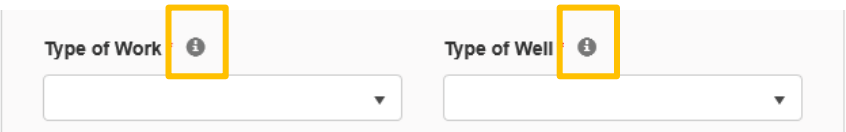

Figure 2: ***Information tool tip outlined in yellow.***

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Picker Grids – Some forms require that you select wells from a grid and associate them with the form as shown in Figure 3 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 as you can see in Figure 3 (Step 1.) to the right 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.

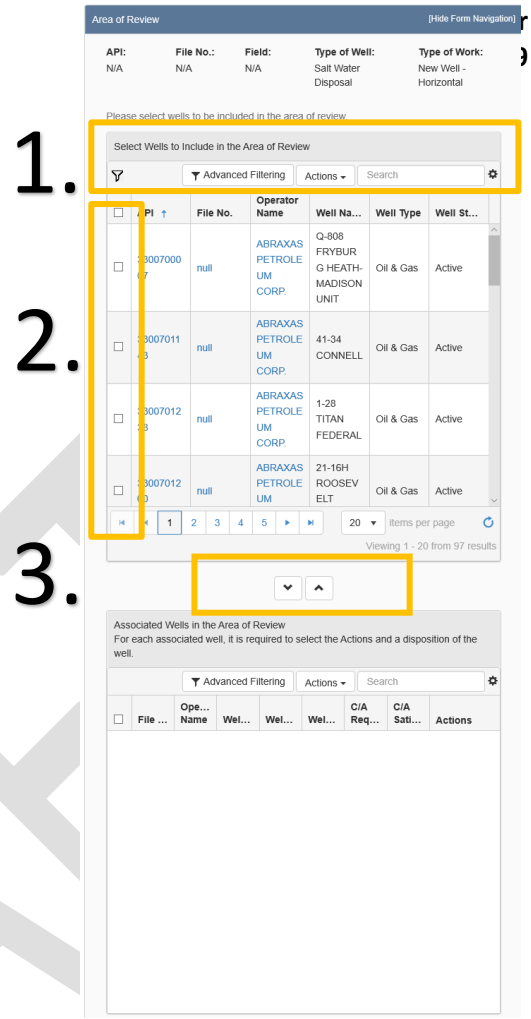

Figure 3: ***Picker Grid Guide showing advanced filtering (1), selection of wells (2), and selection arrows (3).***

Gear Icon - The gear icon located in the top of each grid on the right shown in Figure 3 (Step 1.) in this manual. This icon will show which columns are visible in the table. Open the gear icon and select which columns you would like to view to update as shown in Figure 4.

TIP: The table text does not shrink to fit. The more columns you choose the more difficult it may be to read the information. Use the export function if you would like to see full information details of all columns.

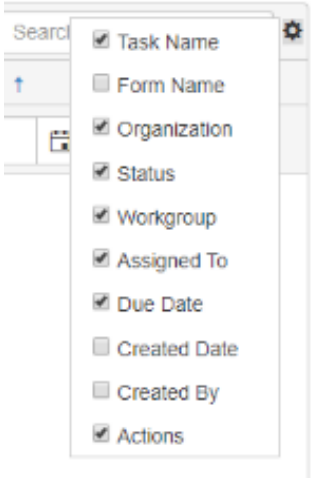

Figure 4: ***Gear Icon showing how to select more columns to view.***

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Grid Action – The "Actions" option in the grid is located on the top of each grid on the right shown in Figure 5 (1.) in this manual. 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.

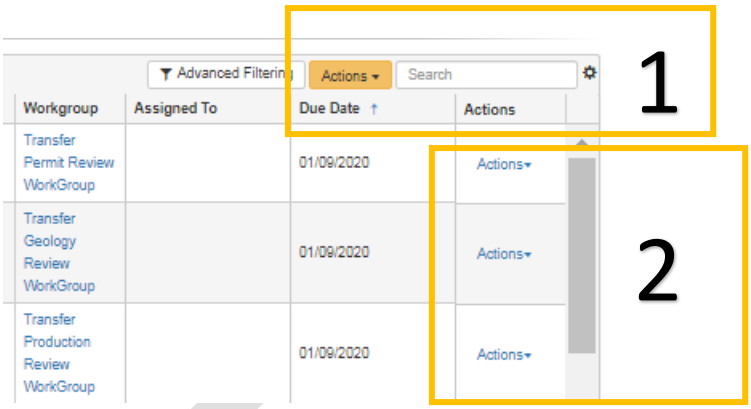

Figure 5: ***Sample of what Grid Action vs Row Action looks like.***

Row Action – Row actions allow for you to modify to edit information in a specific row but not impact the entire grid as shown in Figure 5 (2). Once you have added a line of information in the table or data and need to edit or take action you would select actions next to just the row you are interested in updating.

Accordion Screen Function – If you see a small arrow on any heading bar " this will allow you to open and close sections of the form to streamline the information you are looking at. Click the arrow to open or close this section of data.

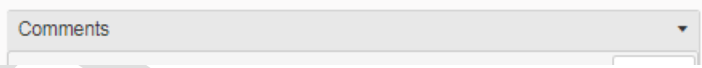

Figure 6: ***Image of Accordion Screen Function***

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

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Transfer: Global Fields and Functions

This section outlines the functions and usage of the pages that are common in all transfers of one asset to another operator. In order to successfully complete a transfer all the below parties will need to submit information into this form: Transferring Organization, Acquiring Organization, and Surety Company.

- *Transferring Organization will complete steps 1,2,3,4, 6, & 7*
- *Acquiring Organization will complete step 5 & 7*
- *Surety Companies will complete step 7*

Hard copies of the Form 15/Transfer Form are still required to complete a transfer.

Visit https://www.dmr.nd.gov/oilgas/rules/fillinforms.asp for a copy of the form needed.

Note: At this time, you can only transfer oil and gas and SWD wells. Pipeline, treating plants, and other facilities will be available to select for transfer at a later NorthSTAR release.

Security Permissions

Access to submit an Application for Permit is only available to those with the below security permissions.

- **NorthSTAR Admin** – Ability to Create, Read, Update, and Delete
- **Well Manager** – Ability to Create, Read, Update, and Delete
- **Well Submitter** – Ability to Create, Read, Update
- **Well 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.

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Step 1: Form Information

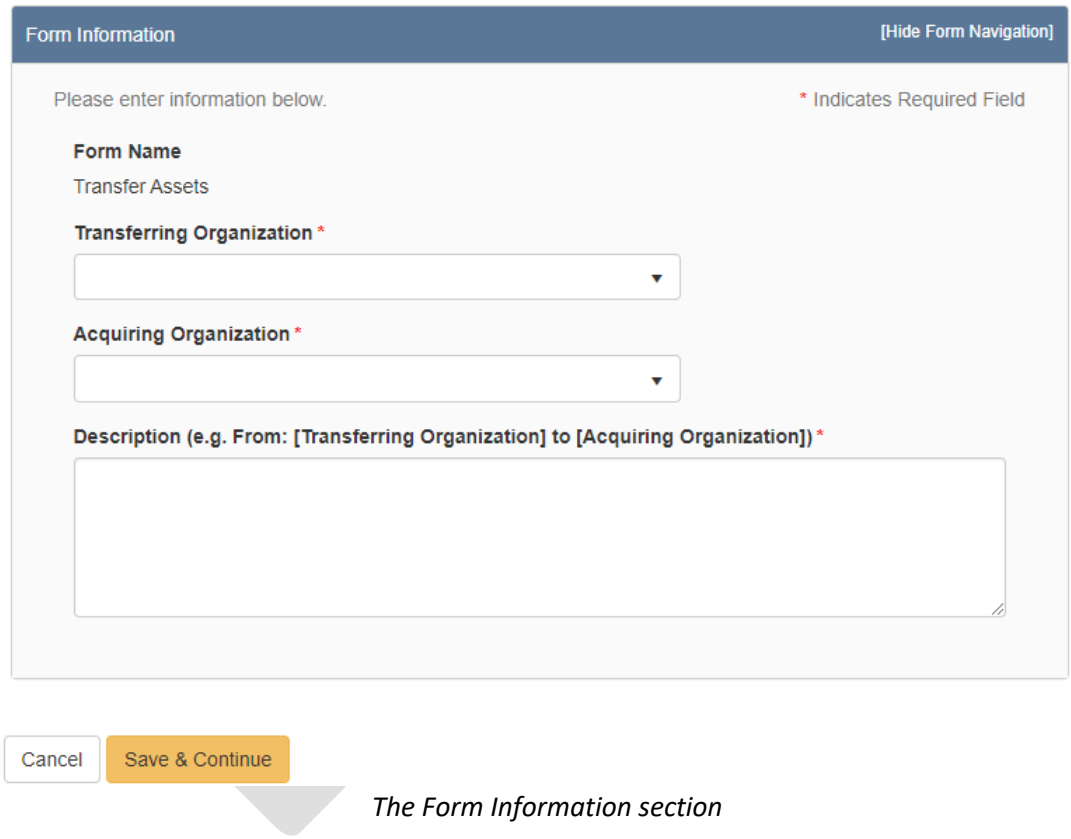
The Form Information page is used to collect transferring organization, acquiring organization, and a brief description of what is being transferred.

Fields and Functions:

Transferring Organization: Select the name of the organization that is submitting the transfer.

Acquiring Organization: Select the name of the organization that is acquiring the assets in the transfer.

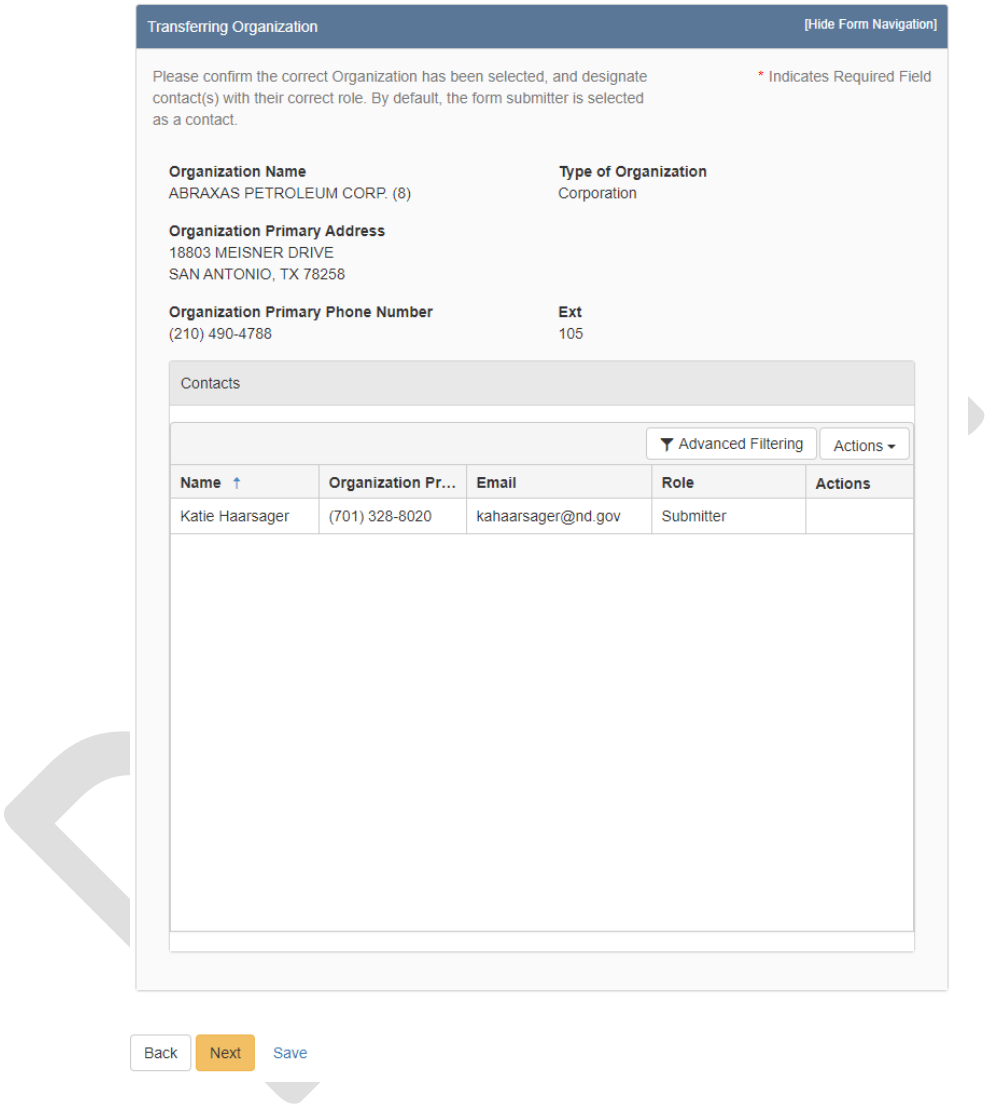
Description: A short description of what the transfer is being submitted for using the format of "From: [Transferring Organization] to [Acquiring Organization]"

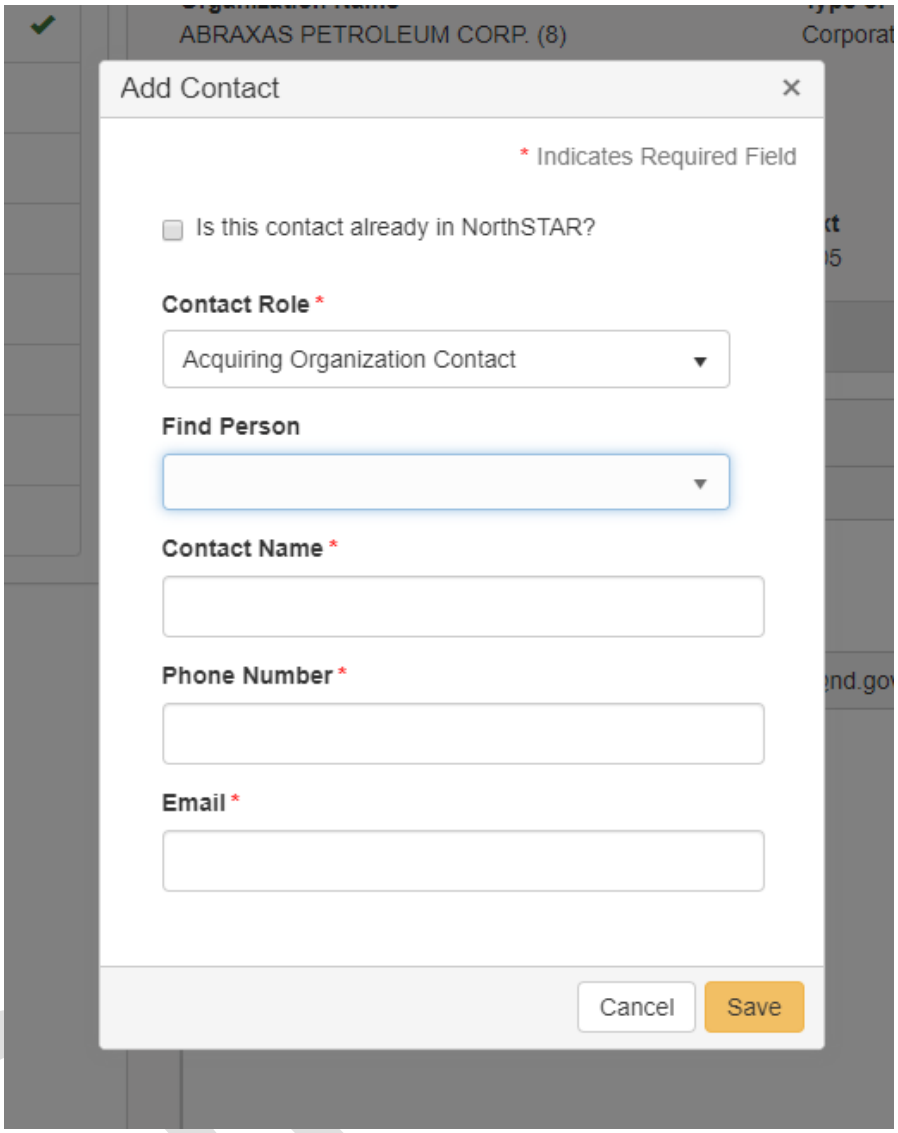


The Form Information section

Step 2: Transferring Organization Information

The Transferring Organization Information grid is used to confirm the contact information of the transferring organization as well as enter in contact information for the point of contact at the acquiring organization.
Select the actions and add contact to enter contact information.





The Transferring Organization Information section and Add Contact page.

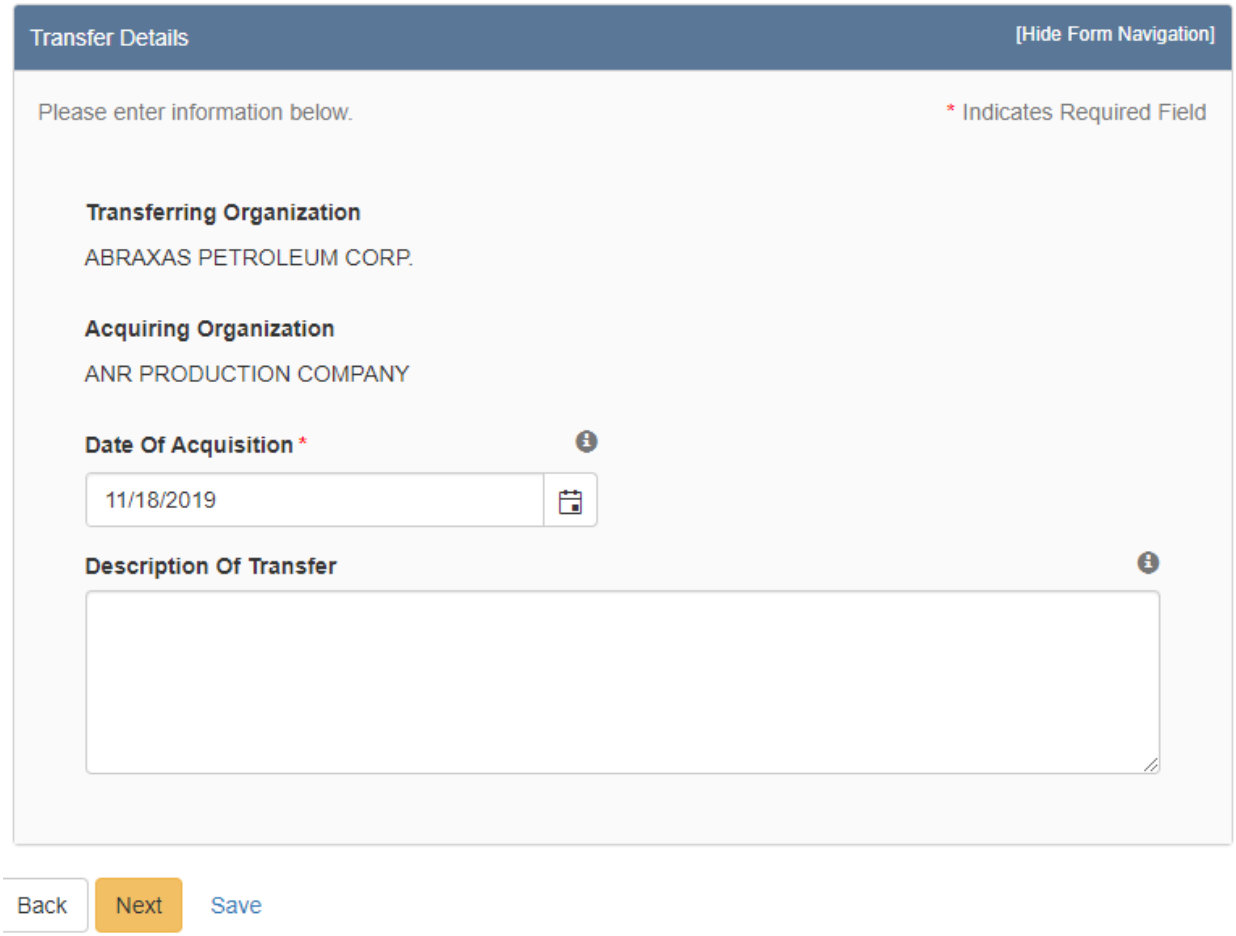
Step 3: Transfer Details

The Transfer Details page is used to provide the date of acquisition from Company A to Company B. Include a description of the transfer such as: number of wells, fields involved, or units impacted.

Fields and Functions:

Date of Acquisition: Effective date of the sale agreement. The date the acquiring organization will control the assets.

Description of Transfer: Description of types of wells, number of wells, and fields or units impacts or other pertinent information.



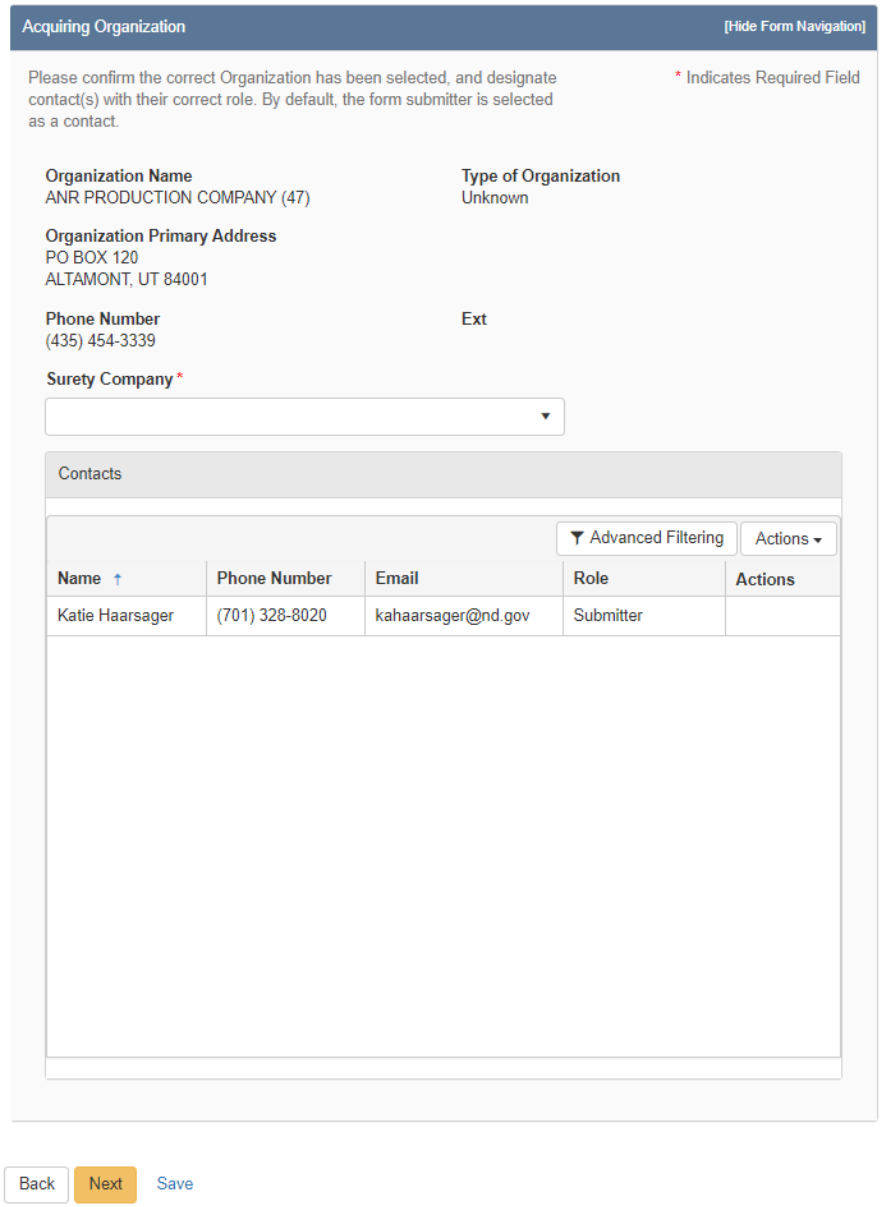
The Transfer Details Section

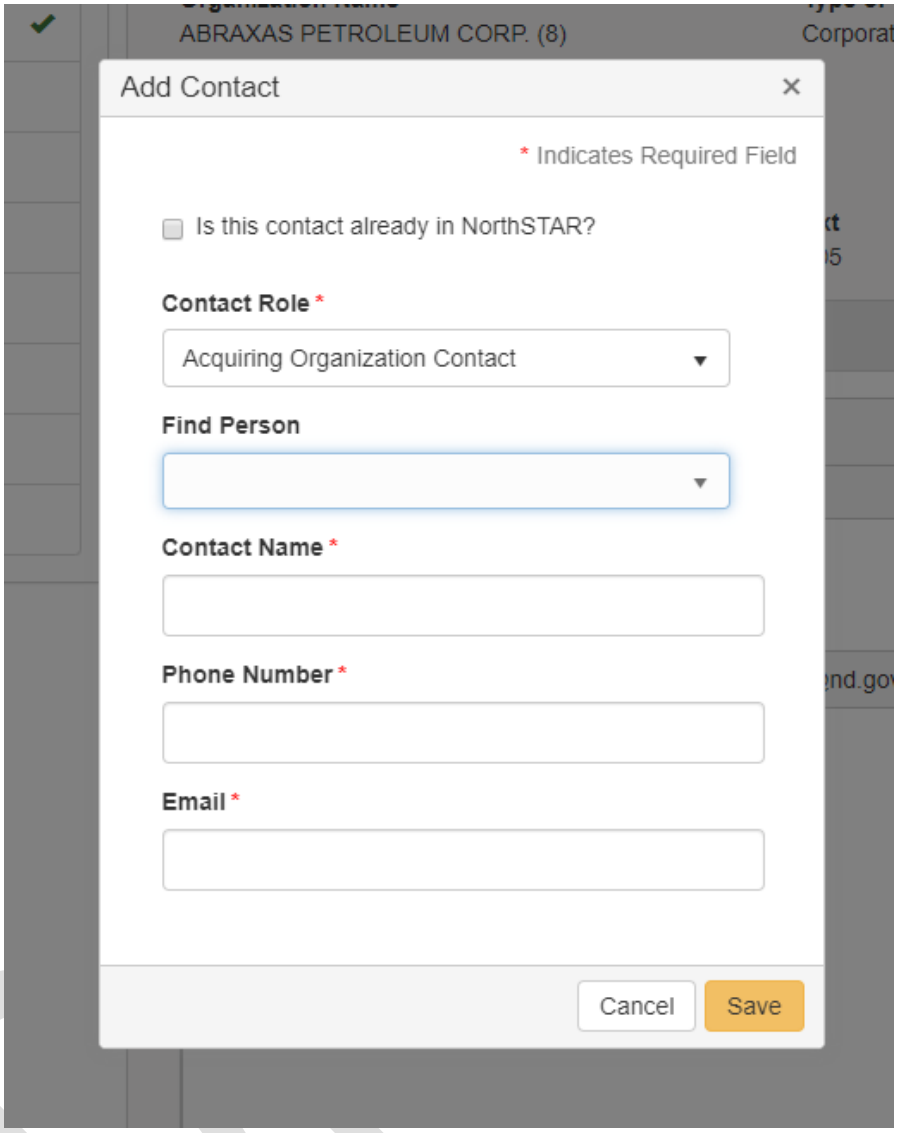
Step 4: Well Association

The well association is where the transferring company can filter through and select and wells to be transferred and associated to the new organization. Once wells are select use the down arrow (shown in the orange box below) to add it to the list of wells to be transferred (associated wells)

Step 5: Acquiring Organization Information

The Acquiring Organization Information grid must be completed by the acquiring organization. This grid is used to enter and confirm the contact information of the surety company.
Select the actions and add contact to enter contact information.





The Transferring Organization Information section and Add Contact page.

Step 6: Document Upload

The transferring organization is required to upload the exhibit of wells transferring to the acquiring organization. Others in the form can also use this section to upload documents applicable to the transfer.
At the top of the grid, click the "Actions" button and select "Add New". Follow the instructions on the input form.

Attaching a New Document:

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.
    - List of Assets to be Transferred
    - Other
    - Scanned Notice of Transfer
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".
9. Once all attachments have been uploaded, click "Save" at the bottom of the page.

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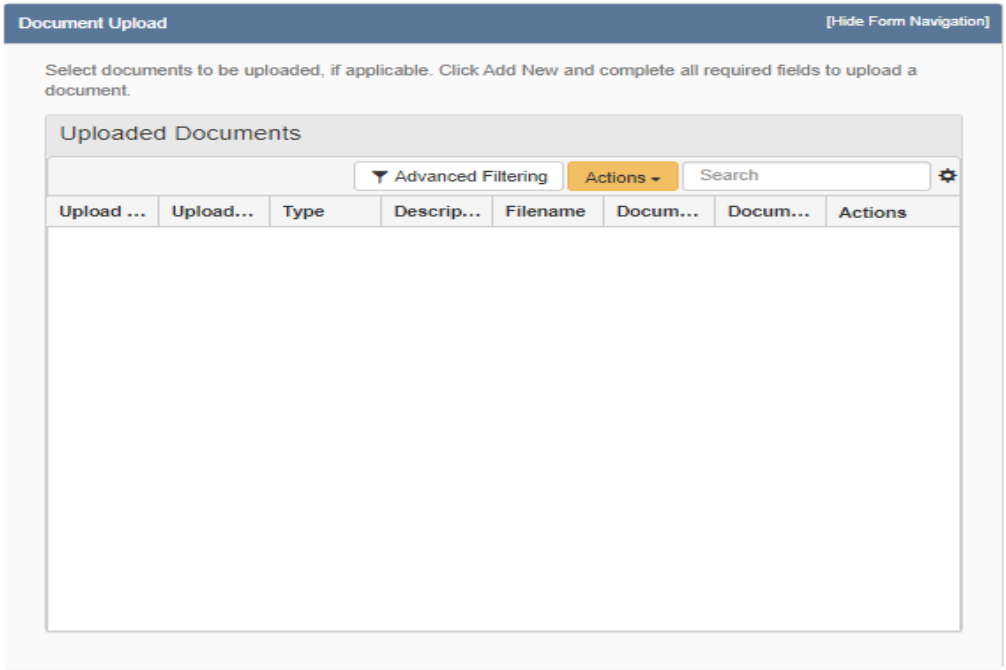

The Document Upload section

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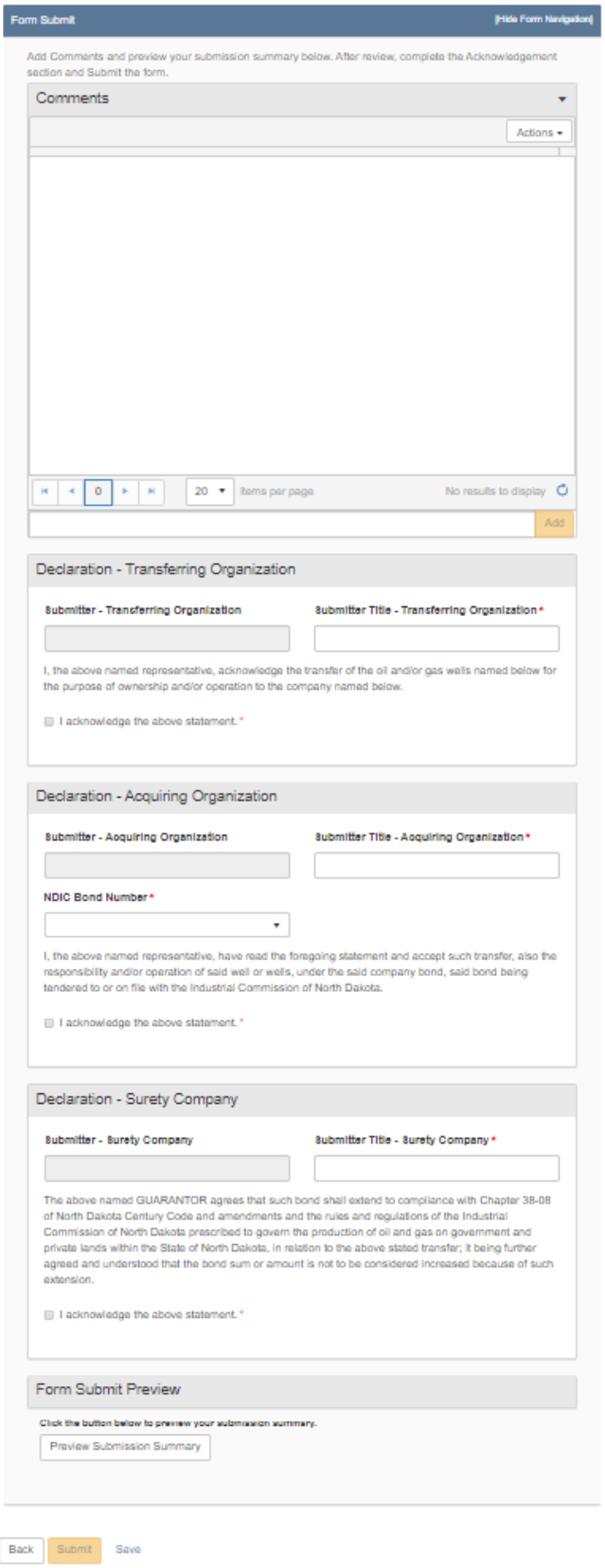
Step 6: Form Submit

Transfer form submittal to the Oil and Gas Division.

<u>Transferring Organization:</u> Click the checkbox next to the statement "I acknowledge the above statement." Under the Declaration – Transferring Organization section.
<u>Acquiring Organization:</u> Enter the NDIC Bond Number & Click the checkbox next to the statement "I acknowledge the above statement." Under the Declaration –Acquiring Organization section.
<u>Surety Company:</u> Click the checkbox next to the statement "I acknowledge the above statement." Under the Declaration – Surety Company section.
Once all parties have completed the steps and checkboxes. The Transferring Organization will be able to log back in and submit the form. Click "Preview Submission Summary" to review the form, and then click "Submit".



he Form Submit Section

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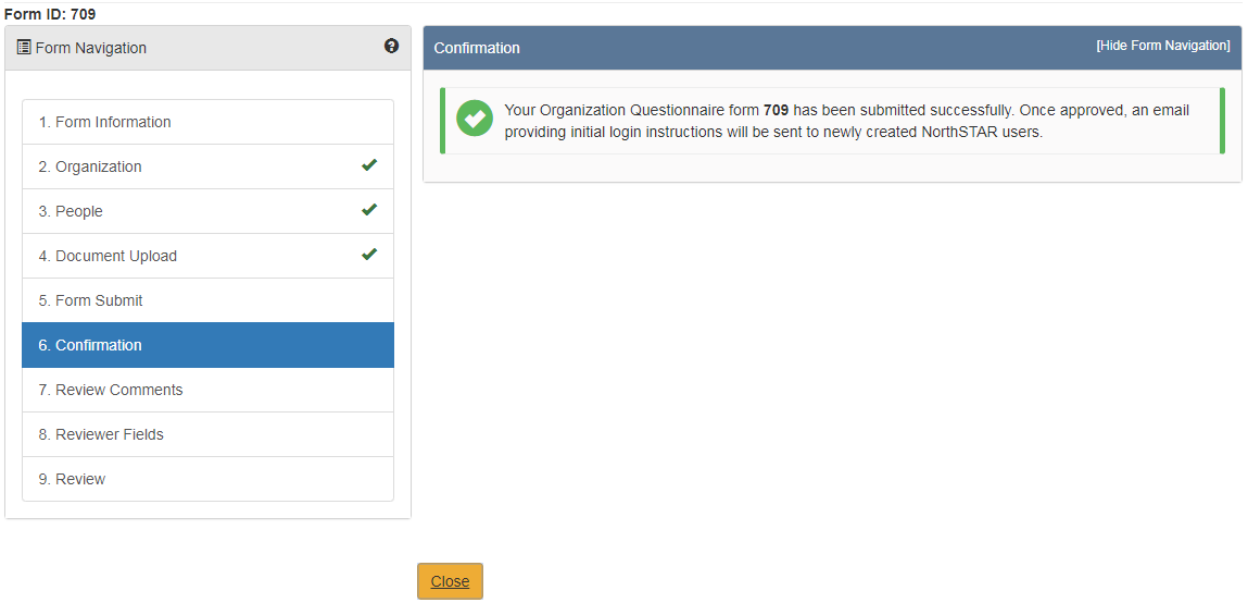
Step 7: Confirmation

*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.*



Step 8: Review Comments

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

Step 8: Review

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

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