Railroad Commission of Texas State
Tracking and Reporting System (LoneSTAR)

Release 1 Software Design

User Guide

General LoneSTAR

Table of Contents

COURSE OVERVIEW

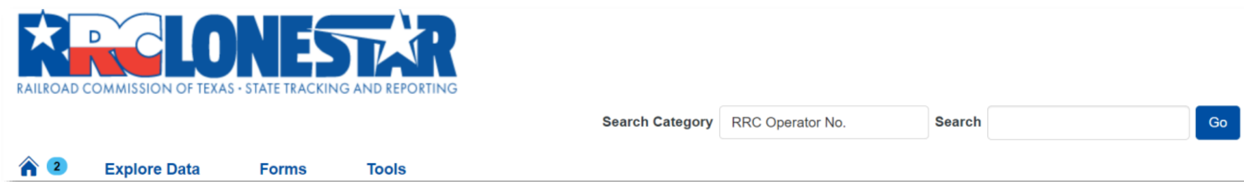
Course Description

This guide can be used to perform general functions in LoneSTAR including adding and modifying Security Assignments, creating and maintaining Workgroups, using functions within the LoneSTAR Main Console, and the Internal Landing Page

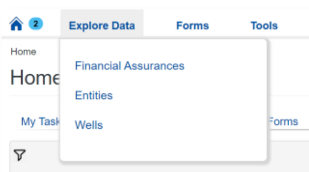
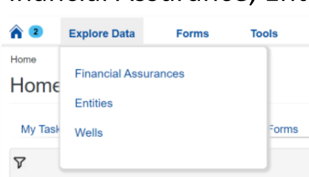
1.1 LoneSTAR Main Console

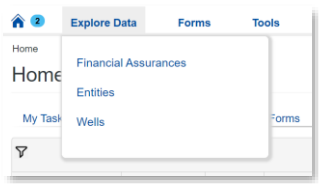
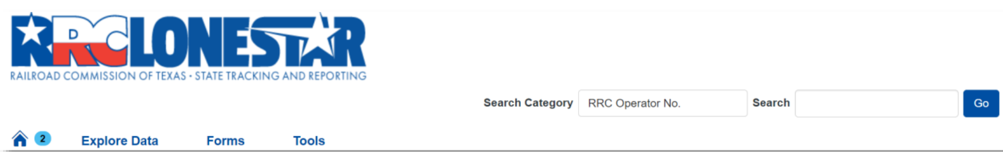
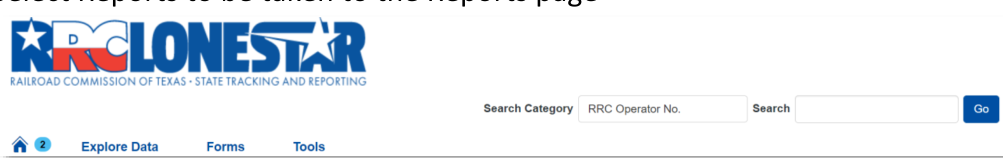
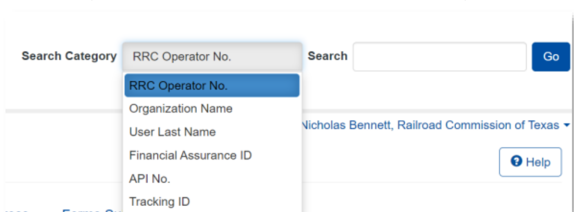
1.1.1 Key Points

- Functions on Main Console persist throughout the system



1.1.2 Steps to Navigate the different capabilities

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. The Internal Landing page is the first page an Internal User is presented with when logging into the system.	
2.	Click the Explore Data dropdown to view the various capabilities. 	
3.	Select Financial Assurance and view the Financial Assurance list page.	
4.	Click the Explore Data dropdown to view the various capabilities, including Financial Assurance, Entities, and Wells. 	

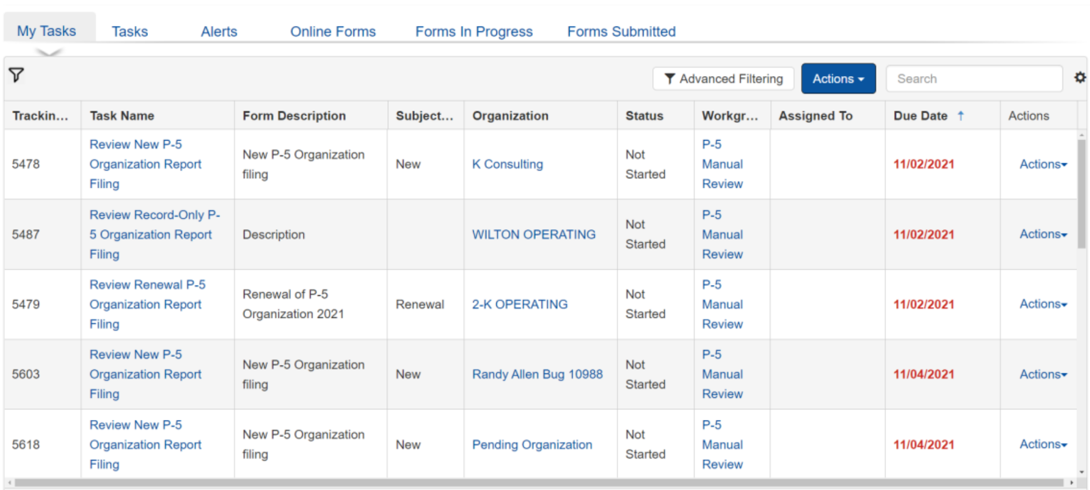
	Note: You do not have to navigate to the Internal Landing page to do this, the LoneSTAR Main Console, represented by the persisting bar at the top of the page, is viewable from any point in the system.	
5.	Select Entities and view the Entities list page	
6.	Click the Explore Data dropdown to view the various capabilities.  Note: You do not have to navigate to the Internal Landing page to do this, the LoneSTAR Main Console is viewable from any point in the system.	
7.	Select Wells and view the Well list page	
8.	Select Forms to be taken to the Online Form list  Note: Online Forms will only display if the User has security permissions allowing them to create a new instance of the form. Note: View Section 1.4 for more information on online forms.	
9.	Select Reports to be taken to the Reports page  Note: View Section 1.13 for more information on generating reports	
10.	Select the dropdown for the Global Search to view the available global search criteria, enter criteria for the search, and then press Go  Note: • Selecting and searching on the various categories will perform a “Contain” search on a column in the resulting grid. See below:	

	○ RRC Operator Number searches on the RRC Operator Number Column. ○ Organization Name searches on the Operator Long Name Column. ○ User Last Name searches on the Last Name Column. ○ Financial Assurance No. searches on the Financial Assurance System ID Column. ○ API searches on the API Number Column of the resulting grid. ○ Well Name searches on the Well Name Column of the resulting grid. • Selecting and searching on the Tracking ID will perform a "Contain" search on the Tracking ID Column of the resulting grid displaying Online forms.	

1.2 Tasks Grids and Creating/Maintaining Tasks

1.2.1 Key Points

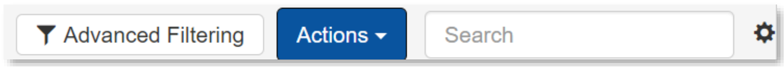
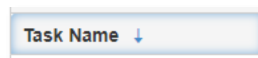
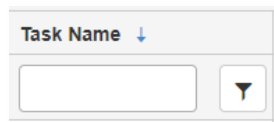
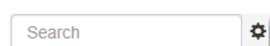
- Learn how to sort, filter, and view Tasks in LoneSTAR.
- Learn how to create and maintain tasks in LoneSTAR.

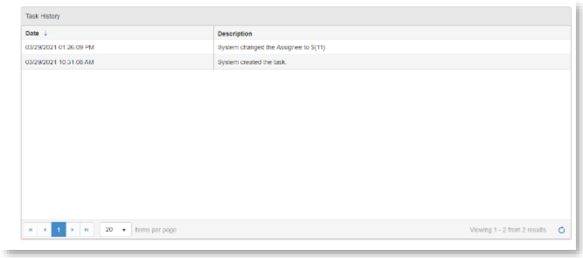
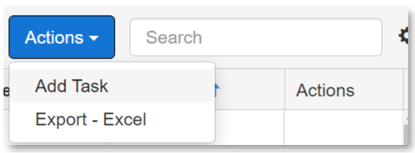
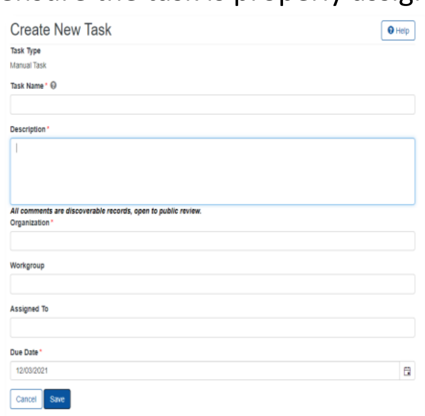


Trackin...	Task Name	Form Description	Subject...	Organization	Status	Workgr...	Assigned To	Due Date	Actions
5478	Review New P-5 Organization Report Filing	New P-5 Organization filing	New	K Consulting	Not Started	P-5 Manual Review		11/02/2021	Actions
5487	Review Record-Only P-5 Organization Report Filing	Description		WILTON OPERATING	Not Started	P-5 Manual Review		11/02/2021	Actions
5479	Review Renewal P-5 Organization Report Filing	Renewal of P-5 Organization 2021	Renewal	2-K OPERATING	Not Started	P-5 Manual Review		11/02/2021	Actions
5603	Review New P-5 Organization Report Filing	New P-5 Organization filing	New	Randy Allen Bug 10988	Not Started	P-5 Manual Review		11/04/2021	Actions
5618	Review New P-5 Organization Report Filing	New P-5 Organization filing	New	Pending Organization	Not Started	P-5 Manual Review		11/04/2021	Actions

1.2.2 Steps to view My Tasks and Tasks

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: • This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page. • My Tasks is default selected. The My Tasks tab shows tasks currently assigned to a workgroup the user is a member of. • The My Tasks grid is initially sorted to display the task with the soonest due date at the top. Tasks with a Due Date in Red indicate the task is	

	overdue and should be reviewed first. Tasks with a Due Date in Green indicate the task is due within 5 days. Tasks with a Due Date in Black indicate the task is due in more than 5 days.	
2.	To search for any task, enter the desired text in the Grid Search textbox and press the Enter key  	
3.	The search will be performed on the “Task Name” and “Organization” columns. Note: If you would like to see the search criteria the search was performed on, you can hover your cursor over the filter icon that appears in the top, left-hand corner of the grid.	
4.	To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.	
5.	If you would like to filter the grid in an order other than the order the grid is initially sorted in, you have a number of options: 1. Clicking the top of any column name will sort the grid based on that column. For example, if you click the Task Name column, it will display an arrow indicating the order in which the grid is now sorted. An up arrow indicates it is sorted alphabetically/numerically (A to Z), a down arrow indicates it is sorted reverse alphabetically/numerically (Z to A).  2. Clicking Advanced Filtering displays the Advanced Filtering row. Entering text in any of these textbox performs a search only on the column in which the textbox is above.  3. Clicking the Gear Icon displays a list of all available columns. Some grids have hidden columns which do not display intially but can be displayed and existing columns can be hidden when they are selected or unselected respectively.  	
6.	To view the details of a particular task, click the Task Name link to be taken to the Task Detail page. Note: Blue text in LoneSTAR indicates it is a link.	
7.	To navigate back to the My Tasks page, click the Home icon again.	
8.	To claim a task (thereby assigning the task to you), click the Actions dropdown in the right-most column and select “Claim Task”. Note: • You may also unclaim a task by performing the same action and selecting “Unclaim Task”.	

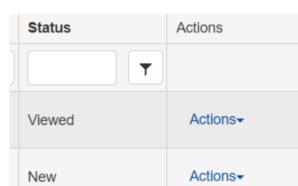
	• Whenever a task is claimed, unclaimed, or reassigned, this will appear in the events grid of the associated Task Detail page. 	
9.	To view the Tasks section, click the Tasks link next to My Tasks. 	
10.	The Tasks grid is largely the same as the My Tasks grid except the Tasks grid displays all Tasks currently in LoneSTAR, not just tasks assigned to a workgroup you are a member in like the My Tasks grid. Note: The Tasks grid can be searched, filtered, and sorted in the same fashion that the My Tasks grid can be. Note: If you are not a member of a workgroup that a task is assigned to, you cannot claim the task.	
11.	To create a new task, use the grid-level actions to select “Add Task”; selecting this action will display the Create New Task page. 	
12.	On this page, the user will be prompted to complete a number of fields to ensure the task is properly assigned. 	Task Name, Description, Organization, Due Date
13.	When the user is finished, they can click either “Cancel” which will discard the task resulting in no new task being created or click “Save” which will create the new task and subsequently causing the task to appear on the Tasks grid. 	

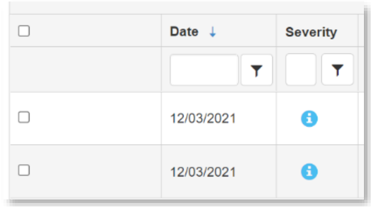
1.3 Alerts

1.3.1 Key Points

- Learn how to view and mark alerts as viewed

1.3.2 Steps to view Alerts

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.	
2.	Select the **Alerts** tab.  	
3.	To search for a particular online form, enter the desired text in the Grid Search textbox and press the Enter key. 	
4.	The search will be performed on the “Message” and “Status” columns. Note: If you would like to see the search criteria the search was performed on, you can hover your cursor over the filter icon that appears in the top, left-hand corner of the grid.	
5.	To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.	
6.	The grid is initially sorted on the Date column, displaying the most recent alerts at the top.	
7.	In order to mark alerts as viewed but not deleted, the user has two options:  1. If the user would like to mark one alert as viewed, they can use the Row-level actions menu to select “Mark Viewed”. 2. If the user would like to mark multiple alerts as viewed, the user can select multiple check boxes or check the top-level	

	checkbox (which selects all currently shown alerts) and then use the Grid-level actions to “Mark Viewed”  Note: • Marking an alert as “viewed” does not delete the alert, it just changes the status of the alert to “Viewed” so it is default filtered out of the grid but can be viewed again by clicking “Advanced Filtering” and clearing out the pre-set filter on the Status column. • Alerts can be marked as “deleted” in the same way as “viewed” but will be permanently removed from the grid.	
8.	The user can view the severity of the alert by viewing the icon in the “Severity” column. Note: • A blue “i” icon indicates it is an informational alert. • A yellow “!” icon indicates it is a warning alert. • A red “X” icon indicates it is a critical alert.	

1.4 Online Forms

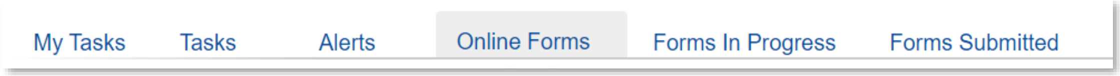
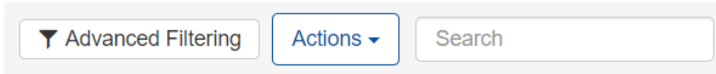
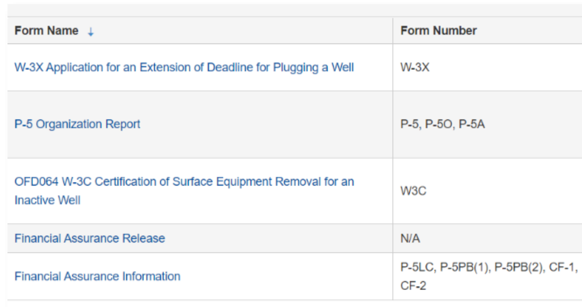
1.4.1 Key Points

- Learn how to view forms that can be submitted.

Form Name	Form Number	Form Rules	Form Category	Purpose
W-3X Application for an Extension of Deadline for Plugging a Well	W-3X	W-3C & W-3X- Rule 3.15	Inactive Well	Request and approve a plugging extension related to one or more wells.
P-5 Organization Report	P-5, P-5O, P-5A	Rule 3.1	P-5	Apply to be a new P-5 organization, renew an existing P-5 organization, or update an existing P-5 organization record.
OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well	W3C	W-3C & W-3X- Rule 3.15	Inactive Well	Certify the removal of surface equipment for inactive wells in order to be compliant with Statewide Rule 15.
Financial Assurance Release	N/A	Rule 3.78	Financial Management	Request the release of financial assurance.
Financial Assurance Information	P-5LC, P-5PB(1), P-5PB(2), CF-1, CF-2	Rule 3.78	Financial Management	Enter information regarding an organization's financial assurance.

1.4.2 Steps to view Online Forms

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.	

<table>
<tr><td>2.</td><td>Select the Online Forms tab

</td><td></td></tr>
<tr><td>3.</td><td>To search for a particular online form, enter the desired text in the Grid Search textbox and press the Enter key.

</td><td></td></tr>
<tr><td>4.</td><td>The search will be performed on the “Form Name” and “Purpose” columns.
Note: If you would like to see the search criteria the search was performed on, you can hover your cursor over the filter icon  that appears in the top, left-hand corner of the grid.</td><td></td></tr>
<tr><td>5.</td><td>To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.</td><td></td></tr>
<tr><td>6.</td><td>Selecting the “Form Name” will launch a new instance of the online form.
Note: Not all forms will always display for every user, online forms will only display to users who have sufficient access to create a new version of the form (See Section 1.9 Updating Security Assignments section of this document).


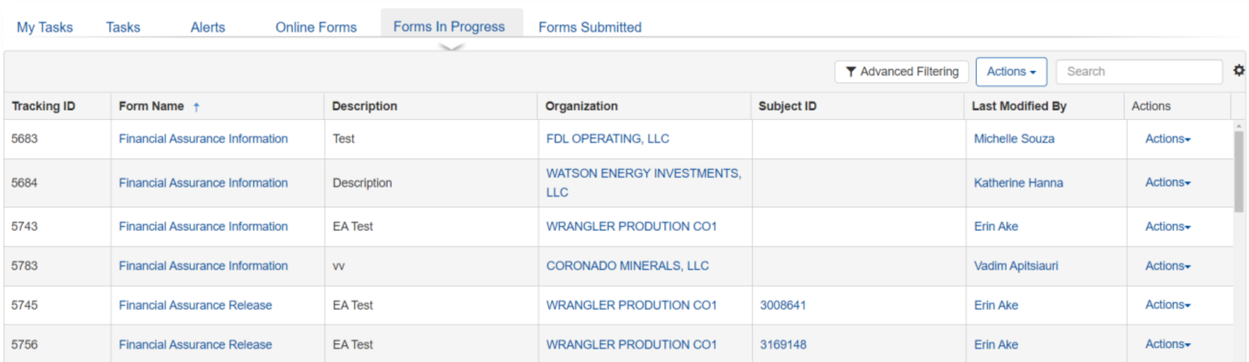
Form Name ↓	Form Number
W-3X Application for an Extension of Deadline for Plugging a Well	W-3X
P-5 Organization Report	P-5, P-5O, P-5A
OFD064 W-3C Certification of Surface Equipment Removal for an Inactive Well	W3C
Financial Assurance Release	N/A
Financial Assurance Information	P-5LC, P-5PB(1), P-5PB(2), CF-1, CF-2
</td><td></td></tr>
<tr><td>7.</td><td>To view the Texas Administrative Code associated to the online form, select the corresponding “Rules” link of the online form.
Note: Selecting this will open a new tab to the Texas Secretary of State website.

</td><td></td></tr>
</table>

1.5 Forms in Progress

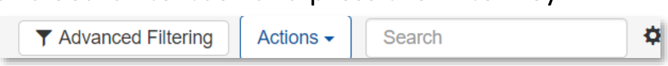
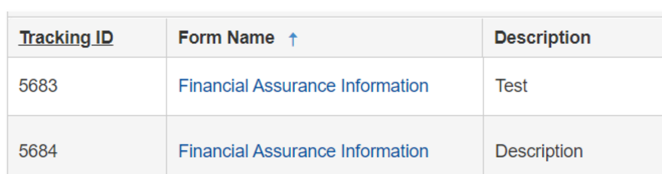
1.5.1 Key Points

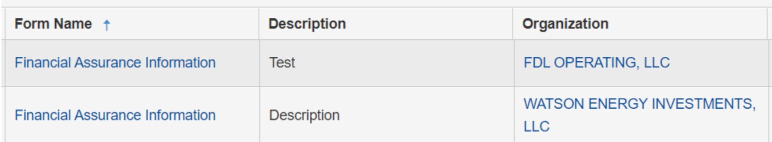
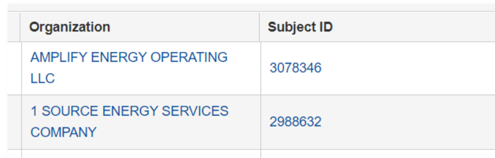
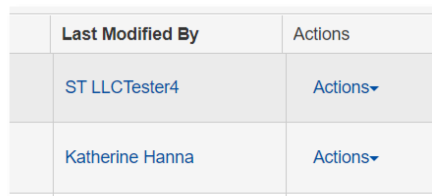
- Learn how to view Forms in Progress
- The Forms in Progress grid displays forms with a status of either “Draft”, “Returned”, or “Deleted” status.
- There is an initial filter on the grid to not initially show forms with a “Deleted” status but this can be removed via Advanced Filtering.



Tracking ID	Form Name ↑	Description	Organization	Subject ID	Last Modified By	Actions
5683	Financial Assurance Information	Test	FDL OPERATING, LLC		Michelle Souza	Actions
5684	Financial Assurance Information	Description	WATSON ENERGY INVESTMENTS, LLC		Katherine Hanna	Actions
5743	Financial Assurance Information	EA Test	WRANGLER PRODUTION CO1		Erin Ake	Actions
5783	Financial Assurance Information	vv	CORONADO MINERALS, LLC		Vadim Apitsiauri	Actions
5745	Financial Assurance Release	EA Test	WRANGLER PRODUTION CO1	3008641	Erin Ake	Actions
5756	Financial Assurance Release	EA Test	WRANGLER PRODUTION CO1	3169148	Erin Ake	Actions

1.5.2 Steps to view Forms in Progress

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.	
2.	Select the **Forms in Progress** tab 	
3.	To search for a particular online form instance in progress, enter the desired text in the Grid Search textbox and press the Enter key. 	
4.	The search will be performed on the "Form Name", "Organization", and "Description" columns. Note: If you would like to see the search criteria the search was performed on, you can hover your cursor over the filter icon that appears in the top, left-hand corner of the grid.	
5.	To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.	
6.	Selecting the "Form Name" will launch the in progress version of the form. Note: Not all forms will always display for every user, online forms will only display to users who have sufficient access to update an existing version of the form (See Section 1.9 Updating Security Assignments section of this document). 	

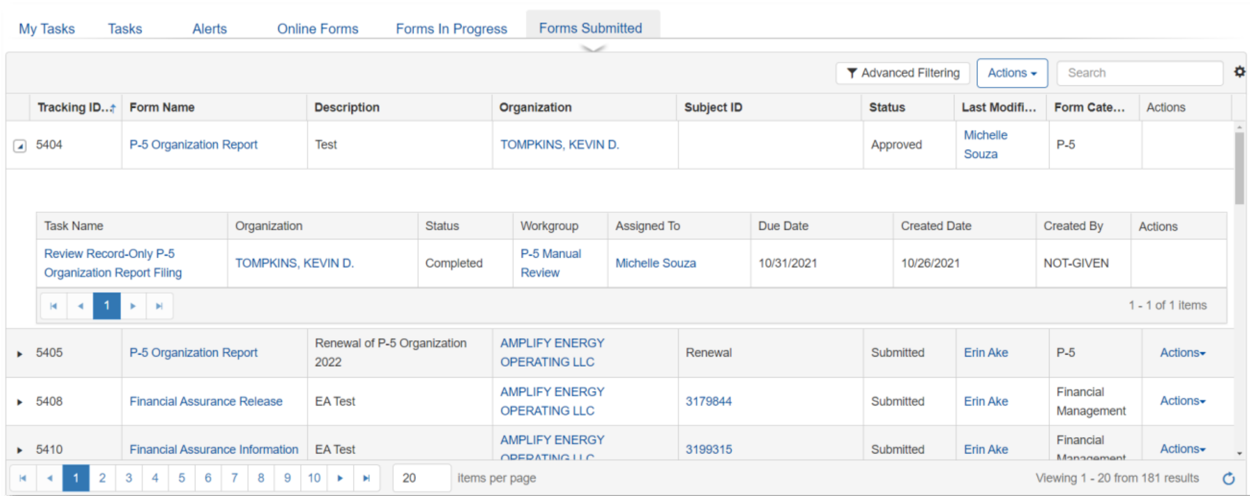
<table>
<tr>
<td>7.</td>
<td>To view the Organization associated to the online form instance, the user can click on the Organization link to be taken to the Organization's detail page.

</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>If the selection is available, selecting the Subject ID will take the user to the associated detail page of the online form. For example, if the user selected the Subject ID for a Financial Assurance Information form in maintain mode, where the data will be prepopulated based on approved data, the user would be taken to the existing Financial Assurance detail page.

</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>Selecting the Row-level actions menu will display the available options:
1. Edit Form – Selecting this will open the form in progress for the user to modify. Note: The user must have "Update" permissions for the online form for the ability to perform this action. (See Section 1.9 Update Security Assignments for more information)


2. Edit Description – Selecting this will open a pop-up to allow the user to modify the description of the online form instance. Note: The user must have "Update" permissions for the online form for the ability to perform this action.
3. Delete – Selecting this will lock the form, not allow any other edits to occur in the form, and mark the form as "Deleted" so it is initially filtered out from the grid. Note: The user must have "Delete" permissions for the online form for the ability to perform this action.
4. Create Form Duplicate – Selecting this will create a duplicate instance of the online form with duplicate data entered into the form matching the original it was created from. Note: The user must have "Create" permissions for the online form for the ability to perform this action.</td>
<td></td>
</tr>
</table>

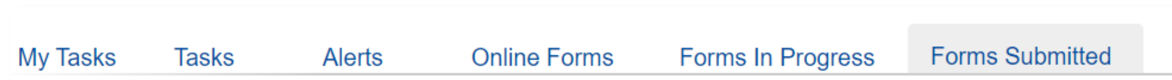
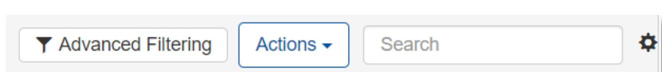
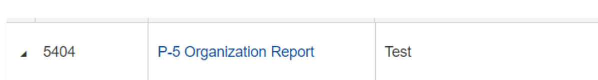
1.6 Forms Submitted

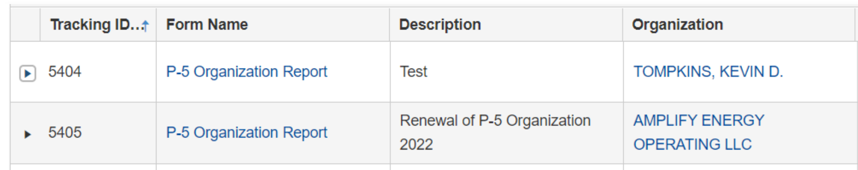
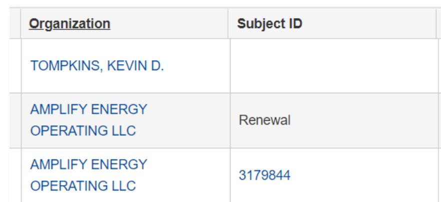
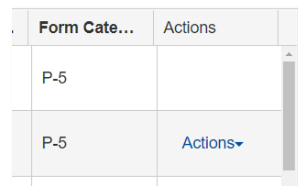
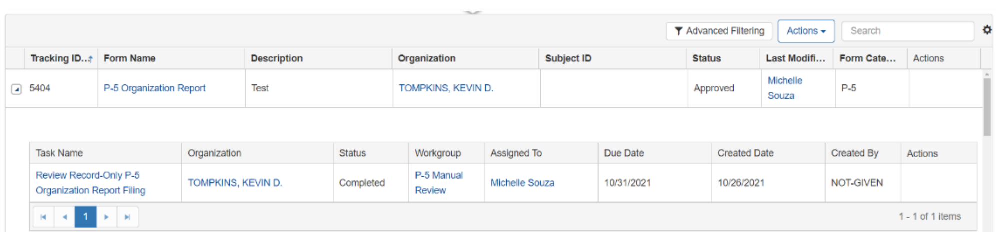
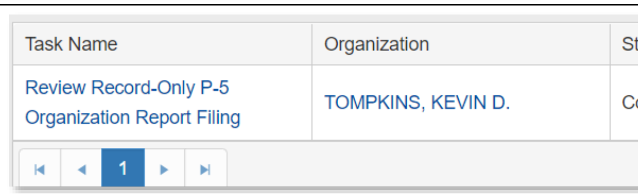
1.6.1 Key Points

- Learn how to view forms that have been submitted by Internal and External Users.
- The Forms in Progress grid displays forms with a status of either "Submitted", "In Progress", "On Hold", "Withdrawn", "Denied", "Approved", and "Accepted".



1.6.2 Steps to view Forms Submitted

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.	
2.	Select the **Forms Submitted** tab  	
3.	To search for a particular online form instance submitted, enter the desired text in the Grid Search textbox and press the Enter key.  	
4.	The search will be performed on the "Form Name", "Organization", and "Description" columns. Note: If you would like to see the search criteria the search was performed on, you can hover your cursor over the filter icon that appears in the top, left-hand corner of the grid.	
5.	To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.	
6.	Selecting the "Form Name" will launch the submitted version of the form. Note: Not all forms will always display for every user, online forms will only display to users  	

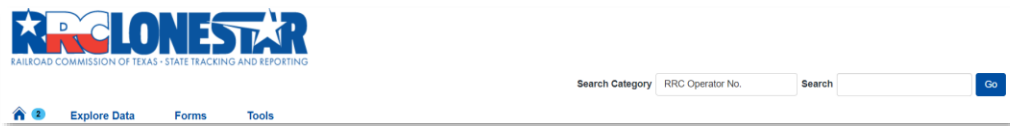
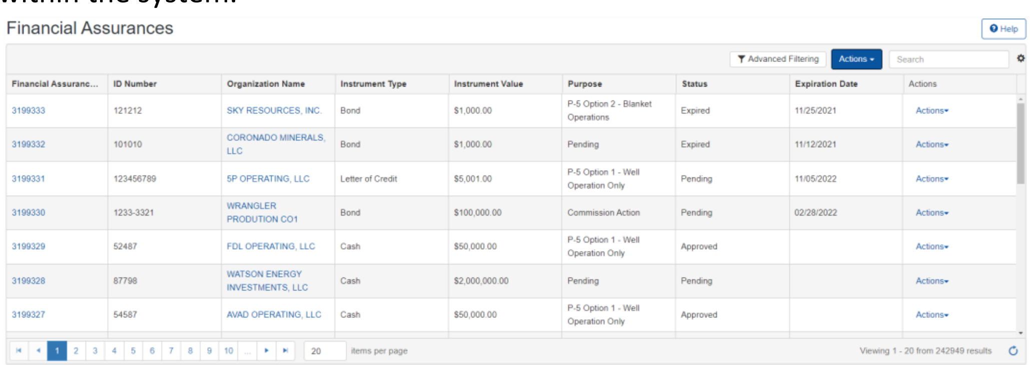
<table>
<tr><td></td><td>who have sufficient access to update an existing version of the form (see Section 1.9 Update Security Assignments section of this document).</td><td></td></tr>
<tr><td>7.</td><td>To view the Organization associated to the online form instance, the user can click on the Organization link to be taken to the Organization's detail page.

</td><td></td></tr>
<tr><td>8.</td><td>If the selection is available, selecting the Subject ID will take the user to the associated detail page of the online form. For example, if the user selected the Subject ID for a Financial Assurance Information form in maintain mode, the user would be taken to the existing Financial Assurance detail page.

</td><td></td></tr>
<tr><td>9.</td><td>Selecting the Row-level actions menu will display the available options:
1. Withdraw Form – Selecting this option will mark the form as "Withdrawn" and it will be moved to the Forms in Progress grid.

</td><td></td></tr>
<tr><td>10.</td><td>To the left of all columns is a small arrow, clicking this arrow will display a sub-grid which shows a list of all tasks associated to the online form submission.

</td><td></td></tr>
<tr><td>11.</td><td>Selecting the Task Name link in the sub-grid will take the user to the Task Detail page of the selected Task.

</td><td></td></tr>
<tr><td>12.</td><td>The workgroup column displays the Workgroup assigned to the particular task in the row and clicking the link will take you to the assigned Workgroup's detail page.</td><td></td></tr>
<tr><td>13.</td><td>The Assigned to column displays the name of the Internal User within the assigned workgroup who has been assigned the task and clicking the link will take you to the assigned Person's detail page.</td><td></td></tr>
</table>

1.7 Navigating List Pages

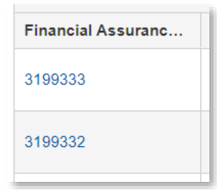
1.7.1 Key Points

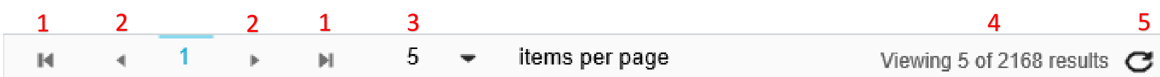
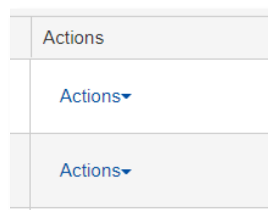
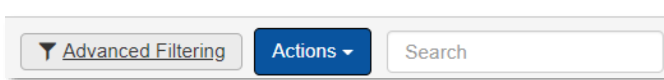
- Learn how to navigate list pages and subsequently launch detail pages.

1.7.2 Steps to navigate list pages

<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>Navigate to the Internal Landing page.
Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.</td><td></td></tr>
<tr><td>2.</td><td>Select Explore Data dropdown from the LoneSTAR main console bar and select any of the available dropdown options to navigate to a list page of the selected capability.

</td><td></td></tr>
<tr><td>3.</td><td>The list page will display populated with records for all Organizations in LoneSTAR. In this example, this list page shows all Financial Assurances associated to all Organizations within the system.

<table>
<tr><th>Financial Assuranc...</th><th>ID Number</th><th>Organization Name</th><th>Instrument Type</th><th>Instrument Value</th><th>Purpose</th><th>Status</th><th>Expiration Date</th><th>Actions</th></tr>
<tr><td>3199333</td><td>121212</td><td>SKY RESOURCES, INC.</td><td>Bond</td><td>$1,000.00</td><td>P-5 Option 2 - Blanket Operations</td><td>Expired</td><td>11/25/2021</td><td>Actions</td></tr>
<tr><td>3199332</td><td>101010</td><td>CORONADO MINERALS, LLC</td><td>Bond</td><td>$1,000.00</td><td>Pending</td><td>Expired</td><td>11/12/2021</td><td>Actions</td></tr>
<tr><td>3199331</td><td>123456789</td><td>5P OPERATING, LLC</td><td>Letter of Credit</td><td>$5,001.00</td><td>P-5 Option 1 - Well Operation Only</td><td>Pending</td><td>11/05/2022</td><td>Actions</td></tr>
<tr><td>3199330</td><td>1233-3321</td><td>WRANGLER PRODUTION CO1</td><td>Bond</td><td>$100,000.00</td><td>Commission Action</td><td>Pending</td><td>02/28/2022</td><td>Actions</td></tr>
<tr><td>3199329</td><td>52487</td><td>FDL OPERATING, LLC</td><td>Cash</td><td>$50,000.00</td><td>P-5 Option 1 - Well Operation Only</td><td>Approved</td><td></td><td>Actions</td></tr>
<tr><td>3199328</td><td>87798</td><td>WATSON ENERGY INVESTMENTS, LLC</td><td>Cash</td><td>$2,000,000.00</td><td>Pending</td><td>Pending</td><td></td><td>Actions</td></tr>
<tr><td>3199327</td><td>54587</td><td>AVAD OPERATING, LLC</td><td>Cash</td><td>$50,000.00</td><td>P-5 Option 1 - Well Operation Only</td><td>Approved</td><td></td><td>Actions</td></tr>
</table>
</td><td></td></tr>
<tr><td>4.</td><td>To search for a particular record, enter the desired text in the Grid Search textbox and press the Enter key. The search will be performed on different columns depending on the list page.
Note: If you would like to see the search


criteria the search was performed on, you can hover your cursor over the filter icon that appears in the top, left-hand corner of the grid.</td><td></td></tr>
<tr><td>5.</td><td>To clear out your search selection, clear your previously typed text from the Grid Search textbox and press the Enter key again; your search criteria will be removed.</td><td></td></tr>
</table>

<table>
<tr><td>6.</td><td>While viewing a list page, there will always be a column that indicates the specific record being displayed. In this example, the Financial Assurance ID serves as this indicator and clicking this link will take the user to the associated detail page of the record. (See Section 1.8 Navigating Detail Pages for more information).

</td><td></td></tr>
<tr><td>7.</td><td>To view the Organization associated to the particular record, the user can click on the Organization link to be taken to the Organization's detail page.

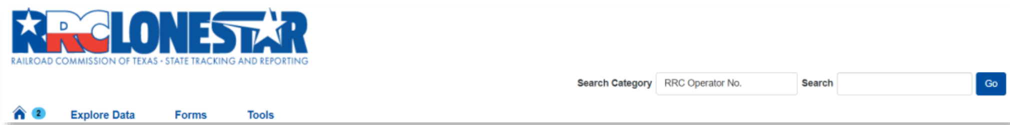
</td><td></td></tr>
<tr><td>8.</td><td>At the bottom of list pages, there are a number of functions:
1. Selecting the arrow with a line icon will take the user to the first or last page of the list page to view additional records.
2. Selecting the arrow will progress the user forward or back one page in the list page to view additional records.
3. The number dropdown allows the user to select how many records they would like to display on each page of the list page.
4. The "Viewing" text tells the user how many records are currently being displayed and how many total records there are for the particular list page.
5. The refresh icon refreshes the results of the list page.

</td><td></td></tr>
<tr><td>9.</td><td>Selecting the Row-level actions menu will display the available options, this will differ between list pages.

</td><td></td></tr>
<tr><td>10.</td><td>Selecting the Grid-level actions menu will display the available options, this will differ between the pages but will always have the option to export the grid to an Excel file.
Note: When exporting a grid, it will download all records from the grid on all pages, not just the currently displayed records.

</td><td></td></tr>
</table>

1.8 Navigating Detail Pages

1.8.1 Key Points

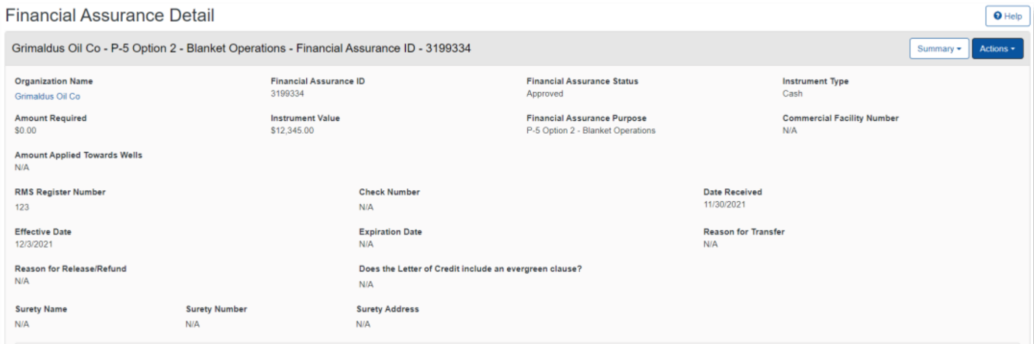
- Learn how to navigate detail pages.

1.8.2 Steps to navigate detail pages

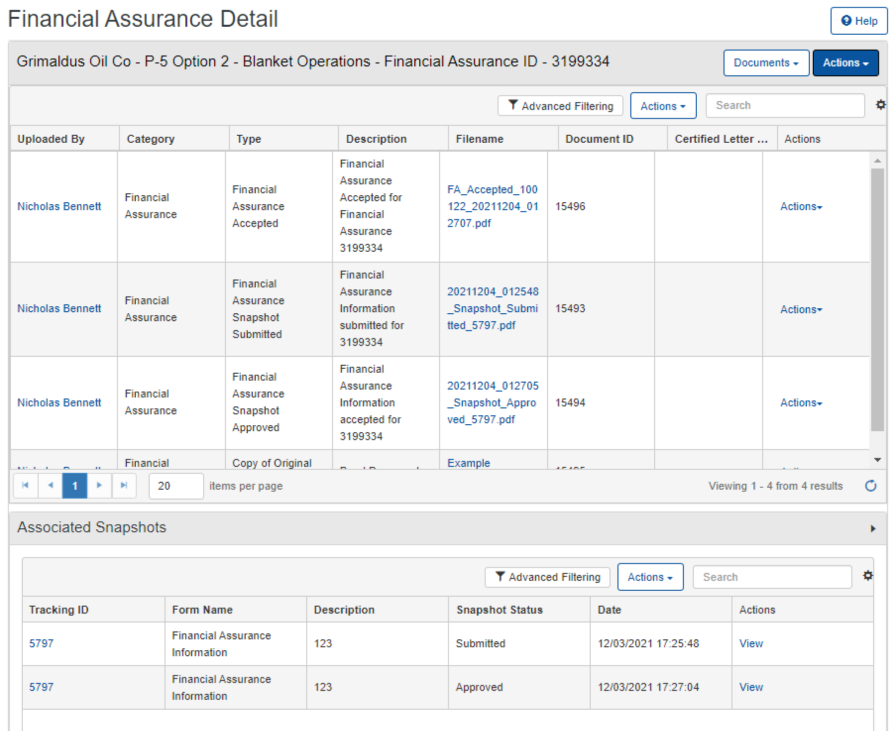
<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>Navigate to the Internal Landing page.
Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.</td><td></td></tr>
<tr><td>2.</td><td>Select Explore Data dropdown from the LoneSTAR main console bar and select any of the available dropdown options to navigate to a list page of the selected capability.

</td><td></td></tr>
<tr><td>3.</td><td>The list page will display populated with records for all Organizations in LoneSTAR. In this example, this list page shows all Financial Assurances associated to all Organizations within the system.

</td><td></td></tr>
<tr><td>4.</td><td>While viewing a list page, there will always be a column that indicates the specific record being displayed. In this example, the Financial Assurance ID serves as this indicator and clicking this link will take the user to the associated detail page of the record.
Note: Clicking the Gear Icon displays a list of all available columns. Some grids have hidden columns which do not display intially but can be displayed and existing columns can be hidden when they are selected or unselected respectively.

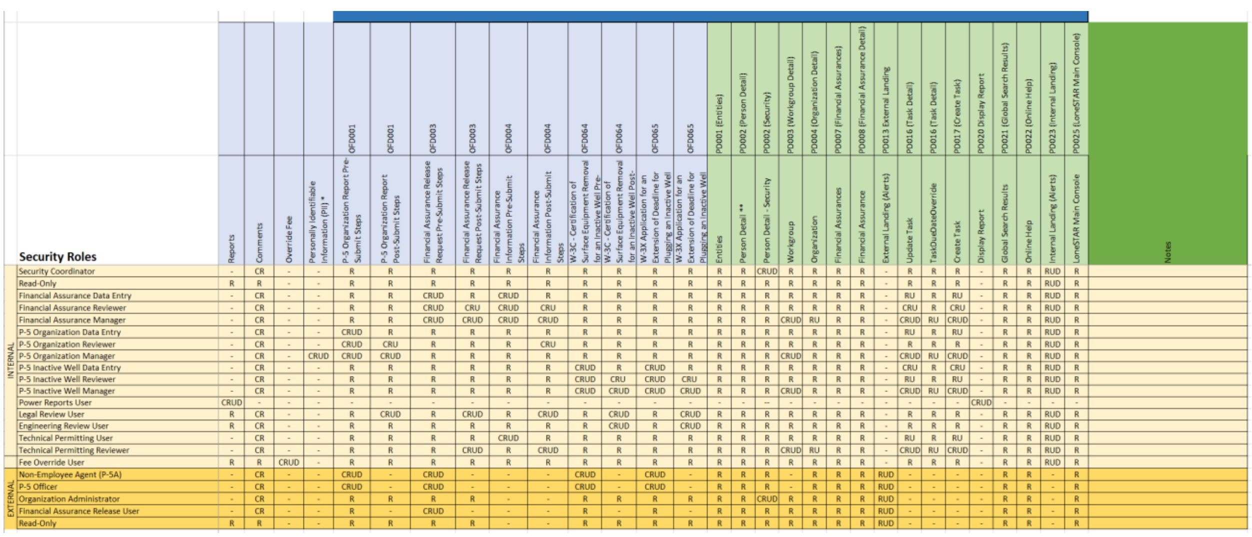
</td><td></td></tr>
</table>

<table>
<tr><td>5.</td><td>The detail page displays all information associated to a record and is broken down into sections and sub-sections.

</td><td></td></tr>
<tr><td>6.</td><td>The user can navigate to various sections of the detail page by clicking the Section Selector on the top bar of the detail page.

</td><td></td></tr>
<tr><td>7.</td><td>Detail pages will have different sections that can be selected but three sections will always be present:
1. Summary Section: This section displays what has determined to be the most pertinent information that should be first displayed to the user upon viewing the detail page.
2. Documents Section: This section displays all documents associated to the record. This can include a number documents including: documents uploaded during the form submission of the record, documents generated as a result of the form submission, snapshots (point-in-time data for the form) associated to the form submission of the record, and all system emails sent to the Organization (these will display only on the Organization detail page).
3. Events Section: This section displays events associated to the online form submission associated to the record. Every detail page will have events defined as to what displays in this section.</td><td></td></tr>
<tr><td>8.</td><td>When on the Documents section, the user has a number of options to view documents and snapshots:
1. Selecting the Uploaded By link will open the Person detail page of the user who uploaded the particular document as part of the form submission.
2. Selecting the filename link will open a copy of the document which was uploaded to the form submission.
3. On the Associated Snapshots grid, selecting the Tracking ID link will open a read-only version of the form submission and display the data as it was entered at the time the snapshot was taken. Note: Snapshots are taken when a form is submitted and when a final determination of the form submission is made.
4. On the Associated Snapshots grid, selecting the View link will display a copy of the snapshot itself which displays the data of the form in an easy-to-read, text format.</td><td></td></tr>
</table>



1.9 Update Security Assignments



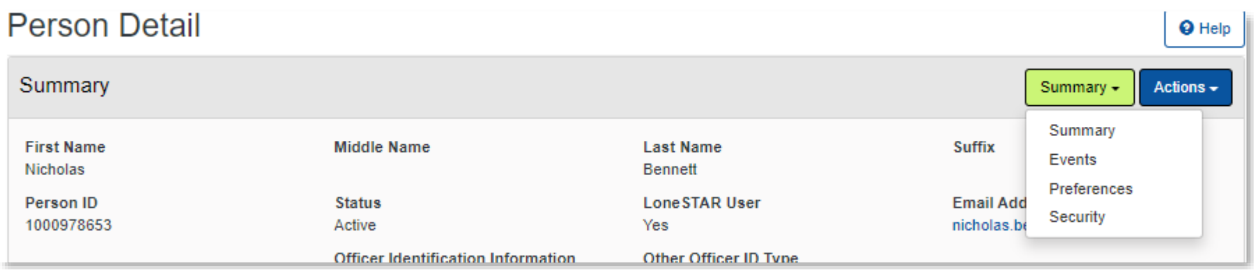
	Security Roles	Reports	Comments	Override Fee	Personally Identifiable Information (PII) *	OFD001 P-5 Organization Report Pre-Submit Steps	OFD001 P-5 Organization Report Post-Submit Steps	OFD003 Financial Assurance Release Request Pre-Submit Steps	OFD003 Financial Assurance Release Request Post-Submit Steps	OFD004 Financial Assurance Information Pre-Submit Steps	OFD004 Financial Assurance Information Post-Submit Steps	OFD064 W-3C - Certification of Surface Equipment Removal for an Inactive Well Pre-	OFD064 W-3C - Certification of Surface Equipment Removal for an Inactive Well Post-	OFD065 W-3X Application for an Extension of Deadline for Plugging an Inactive Well	OFD065 W-3X Application for an Extension of Deadline for Plugging an Inactive Well
INTERNAL	Security Coordinator	-	CR	-	-	R	R	R	R	R	R	R	R	R	R
INTERNAL	Read-Only	R	R	-	-	R	R	R	R	R	R	R	R	R	R
INTERNAL	Financial Assurance Data Entry	-	CR	-	-	R	R	CRUD	R	CRUD	R	R	R	R	R
INTERNAL	Financial Assurance Reviewer	-	CR	-	-	R	R	CRUD	CRU	CRUD	CRU	R	R	R	R
INTERNAL	Financial Assurance Manager	-	CR	-	-	R	R	CRUD	CRUD	CRUD	CRUD	R	R	R	R
INTERNAL	P-5 Organization Data Entry	-	CR	-	-	CRUD	R	R	R	R	R	R	R	R	R
INTERNAL	P-5 Organization Reviewer	-	CR	-	-	CRUD	CRU	R	R	R	CRU	R	R	R	R
INTERNAL	P-5 Organization Manager	-	CR	-	CRUD	CRUD	CRUD	R	R	R	R	R	R	R	R
INTERNAL	P-5 Inactive Well Data Entry	-	CR	-	-	R	R	R	R	R	R	CRUD	R	CRUD	R
INTERNAL	P-5 Inactive Well Reviewer	-	CR	-	-	R	R	R	R	R	R	CRUD	CRU	CRUD	CRU
INTERNAL	P-5 Inactive Well Manager	-	CR	-	-	R	R	R	R	R	R	CRUD	CRUD	CRUD	CRUD
INTERNAL	Power Reports User	CRUD	-	-	-	-	-	-	-	-	-	-	-	-	-
INTERNAL	Legal Review User	R	CR	-	-	R	CRUD	R	CRUD	R	CRUD	R	CRUD	R	CRUD
INTERNAL	Engineering Review User	R	CR	-	-	R	R	R	R	R	R	R	CRUD	R	CRUD
INTERNAL	Technical Permitting User	-	CR	-	-	R	R	R	R	CRUD	R	R	R	R	R
INTERNAL	Technical Permitting Reviewer	-	CR	-	-	R	R	R	CRUD	R	CRUD	R	R	R	R
	Fee Override User	R	R	CRUD	-	R	R	R	R	R	R	R	R	R	R
EXTERNAL	Non-Employee Agent (P-5A)	-	CR	-	-	CRUD	-	CRUD	-	-	-	CRUD	-	CRUD	-
EXTERNAL	P-5 Officer	-	CR	-	-	CRUD	-	CRUD	-	-	-	CRUD	-	CRUD	-
EXTERNAL	Organization Administrator	-	CR	-	-	R	R	R	R	-	-	R	R	R	R
EXTERNAL	Financial Assurance Release User	-	CR	-	-	R	-	CRUD	-	-	-	R	-	R	-
EXTERNAL	Read-Only	R	R	-	-	R	R	R	R	-	-	R	R	R	R

	Security Roles	PD001 (Entities) Entities	PD002 (Person Detail) Person Detail **	PD002 (Security) Person Detail - Security	PD003 (Workgroup Detail) Workgroup	PD004 (Organization Detail) Organization	PD007 (Financial Assurances) Financial Assurances	PD008 (Financial Assurance Detail) Financial Assurance	PD013 External Landing External Landing (Alerts)	PD016 (Task Detail) Update Task	PD016 (Task Detail) TaskDueDateOverride	PD017 (Create Task) Create Task	PD020 Display Report Display Report	PD021 (Global Search Results) Global Search Results	PD022 (Online Help) Online Help	PD023 (Internal Landing) Internal Landing (Alerts)	PD025 (LoneSTAR Main Console) LoneSTAR Main Console	Notes
INTERNAL	Security Coordinator	R	R	CRUD	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
INTERNAL	Read-Only	R	R	R	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
INTERNAL	Financial Assurance Data Entry	R	R	R	R	R	R	R	-	RU	R	RU	-	R	R	RUD	R	
INTERNAL	Financial Assurance Reviewer	R	R	R	R	R	R	R	-	CRU	R	CRU	-	R	R	RUD	R	
INTERNAL	Financial Assurance Manager	R	R	R	CRUD	RU	R	R	-	CRUD	RU	CRUD	-	R	R	RUD	R	
INTERNAL	P-5 Organization Data Entry	R	R	R	R	R	R	R	-	RU	R	RU	-	R	R	RUD	R	
INTERNAL	P-5 Organization Reviewer	R	R	R	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
INTERNAL	P-5 Organization Manager	R	R	R	CRUD	R	R	R	-	CRUD	RU	CRUD	-	R	R	RUD	R	
INTERNAL	P-5 Inactive Well Data Entry	R	R	R	R	R	R	R	-	CRU	R	CRU	-	R	R	RUD	R	
INTERNAL	P-5 Inactive Well Reviewer	R	R	R	R	R	R	R	-	RU	R	RU	-	R	R	RUD	R	
INTERNAL	P-5 Inactive Well Manager	R	R	R	CRUD	R	R	R	-	CRUD	RU	CRUD	-	R	R	RUD	R	
INTERNAL	Power Reports User	-	-	--	-	-	-	-	-	-	-	-	CRUD	-	-	-	-	
INTERNAL	Legal Review User	R	R	R	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
INTERNAL	Engineering Review User	R	R	R	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
INTERNAL	Technical Permitting User	R	R	R	R	R	R	R	-	RU	R	RU	-	R	R	RUD	R	
INTERNAL	Technical Permitting Reviewer	R	R	R	CRUD	RU	R	R	-	CRUD	RU	CRUD	-	R	R	RUD	R	
	Fee Override User	R	R	R	R	R	R	R	-	R	R	R	-	R	R	RUD	R	
EXTERNAL	Non-Employee Agent (P-5A)	R	R	R	-	R	R	R	RUD	-	-	-	-	R	R	-	R	
EXTERNAL	P-5 Officer	R	R	R	-	R	R	R	RUD	-	-	-	-	R	R	-	R	
EXTERNAL	Organization Administrator	R	R	CRUD	R	R	R	R	RUD	-	-	-	-	R	R	-	R	
EXTERNAL	Financial Assurance Release User	R	R	R	R	R	R	R	RUD	-	-	-	-	R	R	-	R	
EXTERNAL	Read-Only	R	R	R	R	R	R	R	RUD	-	-	-	-	R	R	-	R	

1.9.1 Key Points

- CRUD stands for Create, Read, Update, Delete.

- A User can have more than one Security Assignment assigned to them.
- Only a Security Coordinator, an assigned Security Assignment, can manage Security Assignments.
- The grid above shows all available Security Assignments and the access rights the User will have if given that Assignment.
- Internal Users have many more Security Assignments available to them than an External User.
- For Online Forms Pre-Submit Steps:
  - C = Ability to create a new form instance
  - R = Ability to view a form instance
  - U = Ability to Update a form instance in Draft Status
  - D = Ability to Delete a form instance in Draft Status



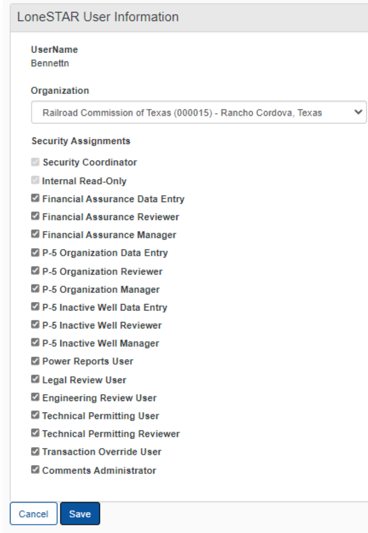
1.9.2 Steps to Modify Security Assignments

Step	Action	Required Fields
1.	From the home page select **Explore Data** and select **Entities**. Then ensure that the **People** tab is selected. Note: When the page loads the **Organizations** tab will be selected by default.	
2.	Search for the Internal User who needs updated Security Assignments.	
3.	Select a record to modify by clicking on the **Name**.	
4.	Use the view button to change from **Summary** to **Security.**	

<table>
<tr>
<td>5.</td>
<td>

Check or uncheck the boxes for the **Security Assignments** you wish to add or remove.

Note: Refer to the Assignment descriptions shown in the table above or the quick reference guide associated with this lesson for additional information about the security assignments.



</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>

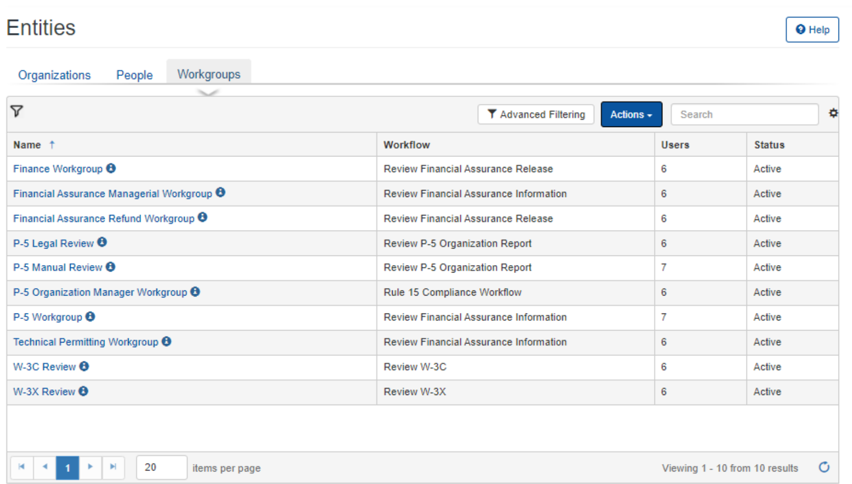
Select **Save**.
Note: When Saved, LoneSTAR will return the screen to the **Person Detail Summary** page. The new security assignments will not take effect until the user logs out and then logs in again.

</td>
<td></td>
</tr>
</table>

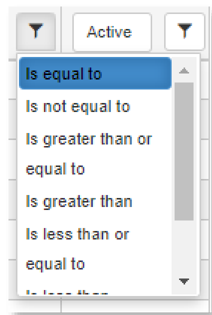
1.10 Search for a Workgroup

1.10.1 Key Points

- Always conduct a search in LoneSTAR before adding or modifying any Workgroup, Person, Organization, etc. to ensure you are not creating duplicate information.



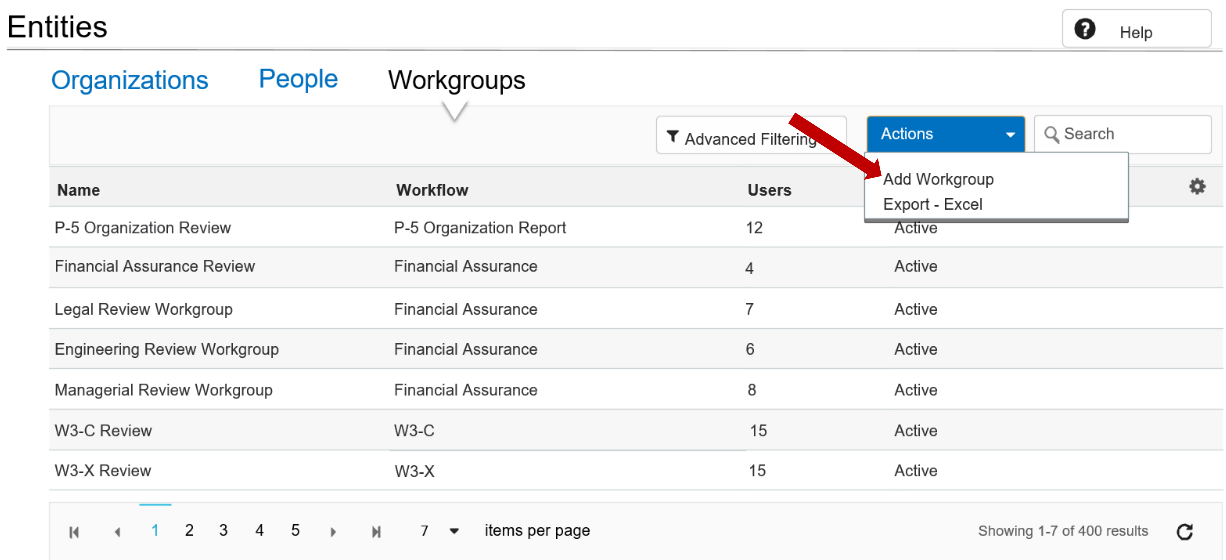
1.10.2 Steps to Search for a Workgroup

Step	Action	Required Fields
1.	From the home page select **Explore Data** and select **Entities**. Then ensure that the **Workgroup** tab is selected. Note: when the page loads the **Organizations** tab will be selected by default.	
2.	Click **Advanced Filtering**	
3.	Delete **Active** from the **Status** search criteria. This step ensures that all Workgroups will be returned in the search results regardless of status. This is very important to prevent duplicates of Workgroups that already exist.	
4.	A. When Advanced Filtering is enabled, enter the search criteria in the appropriate search field. B. Click the filter icon  and select the appropriate search condition:  i. Is equal to: exact match ii. Is not equal: exclude exact match iii. Starts with: exact match of beginning string iv. Contains: exact match in any portion of seach results (preferred) v. Does not contain: exclude exact match in any portion of seach results vi. Ends with: exact match of end of string vii. Is null viii. Is not null ix. Is empty x. Is not empty	

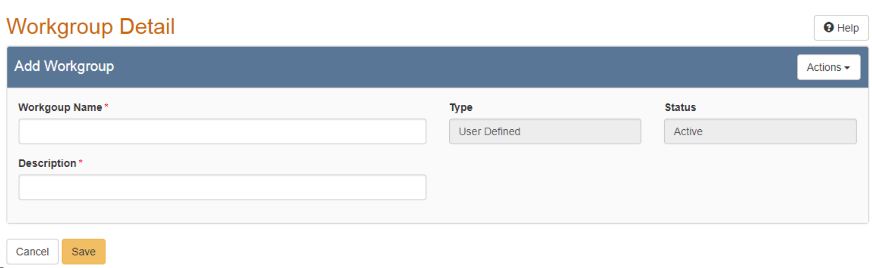
1.11 Creating a Workgroup

1.11.1 Key Points

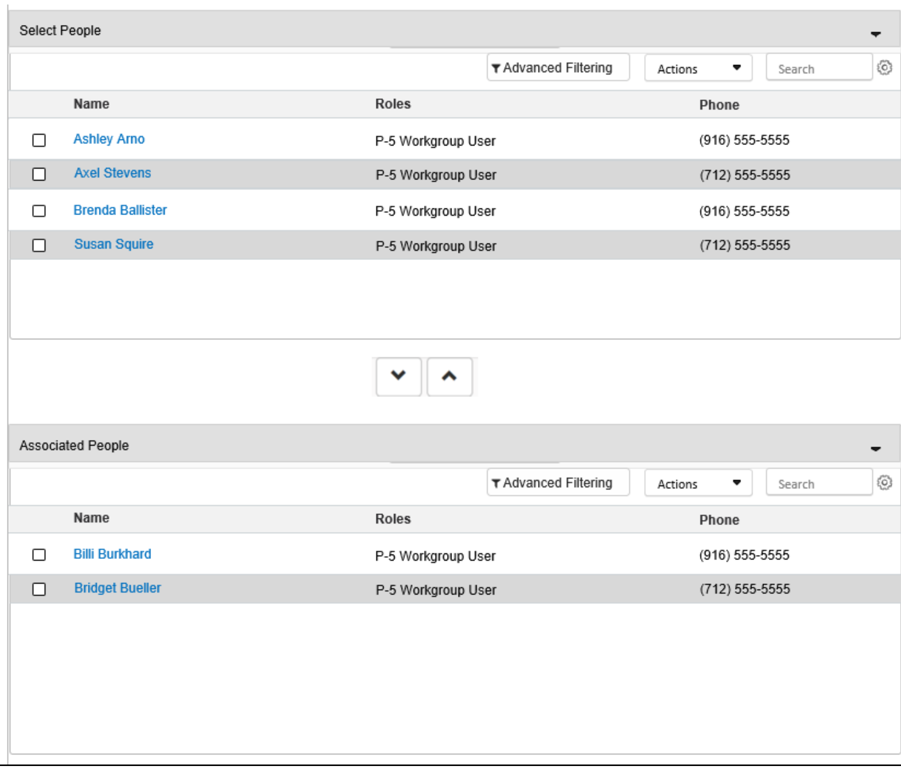
- Only Internal Manager Users (this encompasses any user with “Manager” and Technical Permitting Reviewers can create and modify Workgroups.
- Internal Users can be assigned tasks within a Workgroup.
- The two Workgroup types are System Defined and User Defined. All Workgroups created in LoneSTAR by Internal Manager Users and Technical Permitting Reviewers are User Defined and do not have workflows built into their design.
- System Defined Workgroups cannot be created, but they can have Internal Users added and removed from them.



1.11.2 Steps to Create a Workgroup

Step	Action	Required Fields
1.	From the home page hover over **Explore Data** and select **Entities**. Then ensure that the **Workgroup** tab is selected. Note: when the page loads the **Organizations** tab will be selected by default.	
2.	After you have searched as shown in 3.1.2 and verified that the Workgroup does not already exist, use the **Actions** button to select **Add Workgroup**.  	
3.	Uniquely name the Workgroup. Note: This Workgroup will be User Defined and the Status cannot be changed from Active while the group is being created. Note: Ensure that you have searched LoneSTAR beforehand as shown in 3.1.2 to prevent duplicates of Workgroup names.	Workgroup Name, Description
4.	Enter a description	
5.	Select **Save**.	

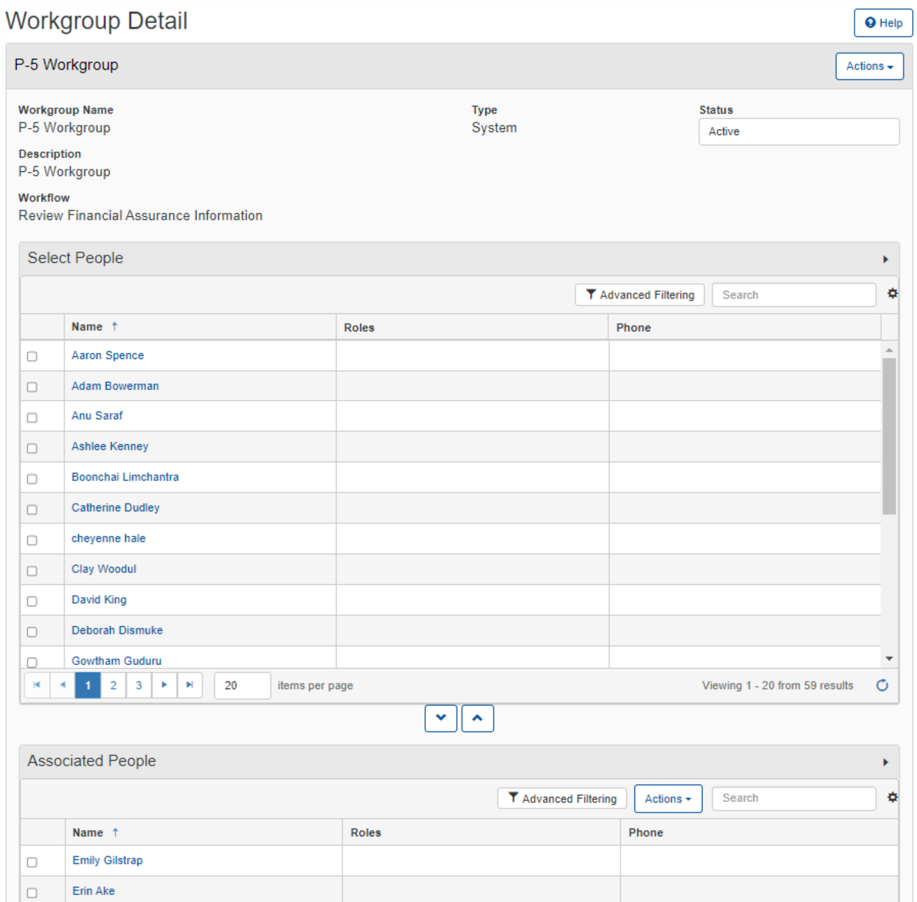
<table>
<tr><td>6.</td><td>Search for a User to add to the Workgroup through the Select People window. (advanced filtering may be used to find an Internal User).
Click the box next to the Internal User’s Name. Then use the Down arrow to move them to the Associated People window. For more information about adding and removing Users See Section 1.12 Modify a Workgroup of this user guide.


Note:
Only Internal Users can be added to Workgroups.
No Users are added or removed from the workgroup until the page is saved.</td><td></td></tr>
<tr><td>7.</td><td>Save changes.</td><td></td></tr>
<tr><td>8.</td><td>Search for a User to add to the Workgroup through the Select People window. (advanced filtering may be used to find an Internal User).
Note: No Users are added or removed from the workgroup until the page is saved.

</td><td></td></tr>
<tr><td>9.</td><td>Click the box next to the Internal User’s Name.</td><td></td></tr>
<tr><td>10.</td><td>Use the Down arrow to move them to the Associated People window.
Note: For more information about adding and removing Users see the next section of this user guide.
</td><td></td></tr>
<tr><td>11.</td><td>Select Save. The selected users are now associated to the workgroup.</td><td></td></tr>
</table>

1.12 Modify a Workgroup

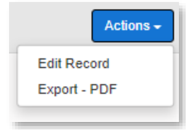
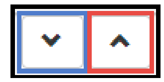
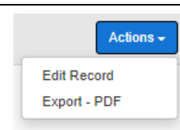
1.12.1 Key Points

- An Admin or Internal Manager may look up and edit Workgroup information.
- Only Internal Users can be members of a Workgroup(s).



1.12.2 Steps to Modify a Workgroup

Step	Action	Required Fields
1.	From the home page hover over **Explore Data** and select **Entities**. Then ensure that the **Workgroup** tab is selected. Note: when the page loads the **Organizations** tab will be selected by default.	
2.	Search for the Workgroup to be updated.	
3.	Select a record to modify by clicking on the **Name**.	

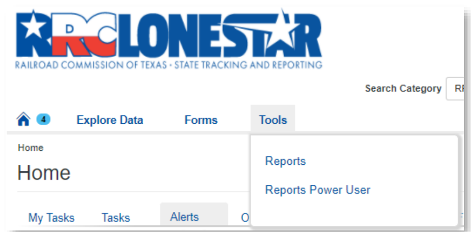
4.	Use the **Actions** button to select **Edit Record.** 	
5.	Change Workgroup header information as needed.	Workgroup Name, Description
6.	Add or remove Users by selecting the box next to their names and using the arrows to either move them to or remove them from the **Associated People** Window.  Note: No Users are added or removed from the workgroup until the page is saved.	
7.	Select **Save**.	
8.	If the user would like to make the workgroup inactive; from the home page hover over **Explore Data** and select **Entities**. Then ensure that the **Workgroup** tab is selected. Note: when the page loads the **Organizations** tab will be selected by default.	
9.	Search for the Workgroup to be made inactive.	
10	Select a record to modify by clicking on the **Name**.	
11	Use the **Actions** button to select **Edit Record** 	
12	Remove staff from the Workgroup by checking the boxes next to their names and using the up arrow to remove them from the **Associated People** Window.  Note: No Users are added or removed from the workgroup until the page is saved.	
13	Use **Status** drop down menu to select **Inactive** Note: No tasks or Users can be associated to the Workgroup, or LoneSTAR validation will prevent the status change.	No active tasks, No Users
14	Select **Save**.	

1.13 Reports

1.13.1 Key Points

- Learn how to generate reports in LoneSTAR.
- Not all users can generate reports, they need to have necessary permissions to perform this action. See Section 1.9 Update Security Assignments for more information on how to grant additional security assignments.

1.13.2 Steps to generate reports

Step	Action	Required Fields
1.	Navigate to the **Internal Landing** page. Note: This is your LoneSTAR home page, so pressing the Home icon will take you to the My Tasks page.	
2.	Select the Reports page from the Tools dropdown on the LoneSTAR main console. 	
3.	The user will be presented with the possible reports that can be generated: 1. P-5 Status Application: This report produces a list of applications (P-5 Organization Report; Financial Assurance Release; Financial Assurance Information; Certification of Surface Equipment Removal for an Inactive Well; Application for an Extension of Deadline for Plugging an Inactive Well) by application status to best assist the P-5 team in managing workload and performance metrics. 2. Pending Review Applications: Summary statistics on the volume of forms entering manual review, the reasons forms are sent to manual review, and the average time needed to conduct manual review. 3. Organization Application Status: This report produces a list of P-5 Organization Reports that have been submitted. 4. Summary Analysis – P5 Records: This report displays a list of the number of Operators by Organization (P-5) Status for insight on Operators' status across the state. 5. Financial Assurance Summary: The report lists the number and dollar amount of all Financial Assurance for active operators and Financial Assurance by Financial Assurance status as well as the amount refunded, if applicable.	
4.	When choosing to generate a report, the user who is running the report is presented with a number of parameters. The parameters selected will determine what the generated report displays. Note: Some reports will have values pre-populated to assist the user in generating this report but these can always be overridden.	
5.	When the parameters are selected and the user generates the report, LoneSTAR will download the report in an Excel file.	

6.	The Excel file will be split up into easily readable sections depending on the report. In this example, the report is broken down into months to display the data.	

Summary Analysis – P5 Records	
Summary Analysis – P5 Records	
Generation Date:	1/20/2020
Fiscal Year	2019
September	
Number of New P-5's Approved (adds)	25
Number of P-5 Renewals Approved (changes)	54
Number of P-5 Record Only Updates Approved (change	67
Number of deleted records (deletions)	11
Total	157
October	
Number of New P-5's Approved (adds)	25
Number of P-5 Renewals Approved (changes)	54
Number of P-5 Record Only Updates Approved (change	67
Number of deleted records (deletions)	11
November	
Number of New P-5's Approved (adds)	25
Number of P-5 Renewals Approved (changes)	54
Number of P-5 Record Only Updates Approved (change	67
Number of deleted records (deletions)	11
December	
Number of New P-5's Approved (adds)	25
Number of P-5 Renewals Approved (changes)	54
Number of P-5 Record Only Updates Approved (change	67
Number of deleted records (deletions)	11

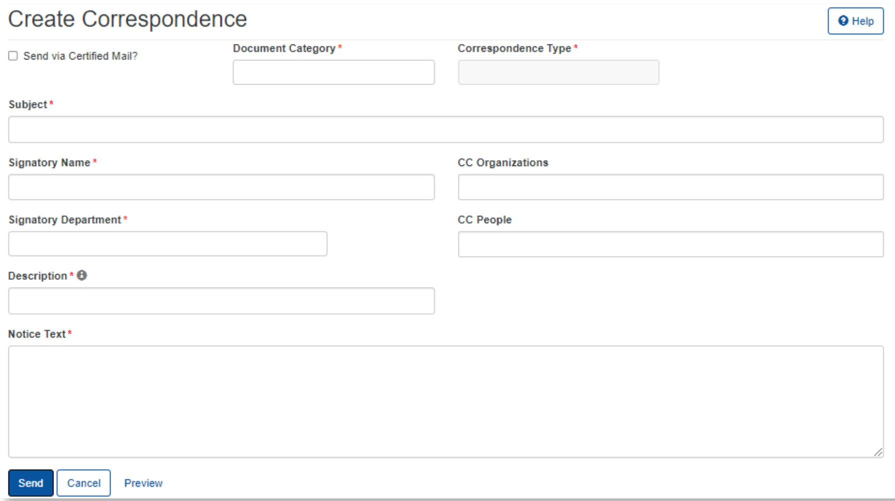
1.14 Generate Correspondence

1.14.1 Key Points

- Learn how to generate correspondence to an Operator in LoneSTAR

1.14.2 Steps to generate reports

Step	Action	Required Fields
1.	There are a number of ways to generate correspondence to an Operator in LoneSTAR. 1. As previously mentioned in this guide, a user can navigate to an Organization's detail page. On this page, the user can navigate to the Documents Section. On this section, if the user selects the Page-level actions, they can choose to generate correspondence if they have sufficient permissions to do so. (See Section 1.8 Navigating Detail Pages for more information) 2. Some online form instances allow the user to generate correspondence as part of the online form submission. These forms have a step called "Create Correspondence" which allows the user to accomplish this.	

2.	Regardless of the method used to generate correspondence, the user will be presented with a number of fields to complete in order to generate the correspondence. Note: In this example, the user is given the option if they would like to “Create Correspondence” and if they are “Ready to Send?”. These options are only available for the user if they are generating correspondence within an online form submission.  	Subject, Signatory Name, Signatory Department.
3.	If the user would like to select pre-defined text snippets into the “Correspondence Text” section, they can select the “Insert Snippet” button which will allow the user to select the pre-defined text to be entered. Note: The user can select multiple snippets for a single correspondence and the text that is inserted can and should be edited before being sent to ensure the snippet is pertinent to the correspondence being sent.	
4.	If the user would like to select additional Organizations to receive the correspondence, they can choose to add them via the “CC Organization” multiselect.	
5.	If the user would like to select additional People to receive the correspondence, they can choose to add them via the “CC People” multiselect.	
6.	If this correspondence was generated via the Organization’s detail page, the user will click the “Send” button when they are ready for the correspondence to be sent. If this correspondence was generated via the online form step, if the user selects the “Ready to Send?” checkbox, the correspondence will be sent when a determination is made on the form submission, for example, Approve or Deny. Note: For the online form step method, if the user completed all required fields and enters text in the correspondence but does not select the “Ready to Send?” checkbox, the correspondence will not be sent.	

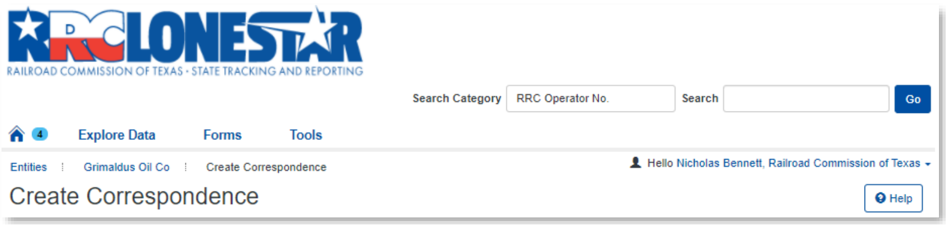
1.15 Navigating Online Help

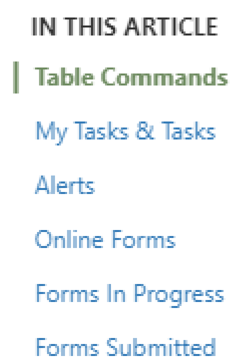
1.15.1 Key Points

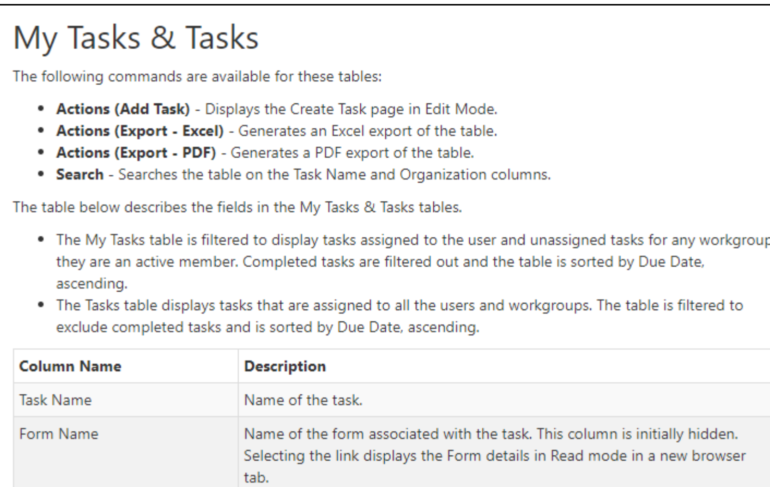
- Learn how to navigate the online help system.

1.15.2 Steps to generate reports

<table>
<tr><th>Step</th><th>Action</th><th>Required Fields</th></tr>
<tr><td>1.</td><td>At any point in LoneSTAR, the user can choose to launch online help via the LoneSTAR main console.


</td><td></td></tr>
<tr><td>2.</td><td>When selecting the Online Help button, LoneSTAR will automatically launch the online help in the context of the page the user is currently on.</td><td></td></tr>
<tr><td>3.</td><td>When the online help is displayed, the user may select any of the links on the right side of the page to be taken to the various sections/steps of the page/form the user is currently in context of. The highlighted portion shows the section the user is currently viewing.


</td><td></td></tr>
<tr><td>4.</td><td>The body text of the online help page describes all data elements and actions which are present on the section.



My Tasks & 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.

Column Name	Description
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.
</td><td></td></tr>
<tr><td>5.</td><td>The left-hand side of the page shows the various capabilites within LoneSTAR and allows the user to navigate to other sections that the user is not currently in context of.</td><td></td></tr>
</table>