



Federal Aviation  
Administration

# Advanced Techniques in WebCM





# Advanced Techniques in WebCM Training Guide

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# Login

## Topics:

- *Login shortcut - <Tab><Enter>*
- *Security question*

## Documents:

- *WebCM Login*
- *Forgot Password*
- *Personal Information*

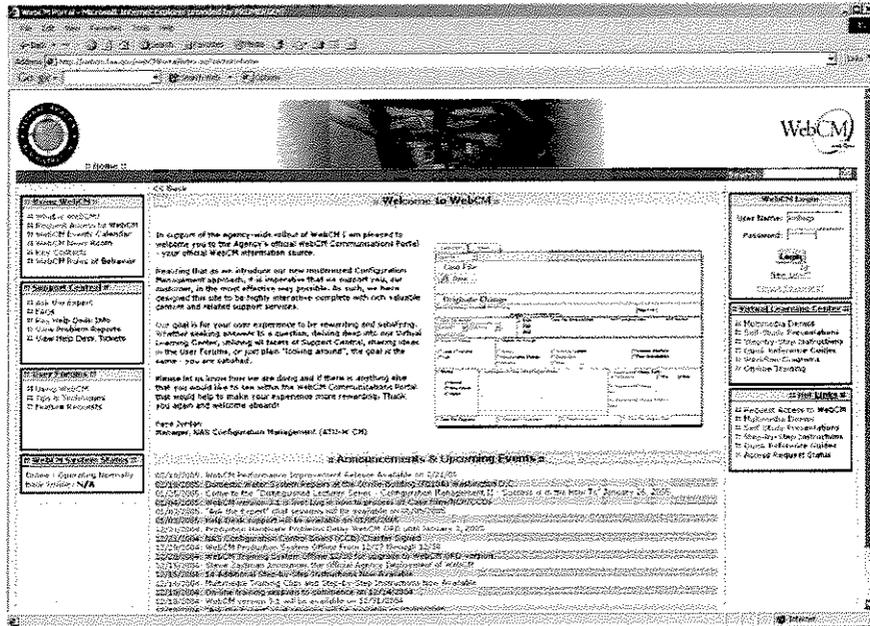


# Step-by-Step Instructions WebCM Login

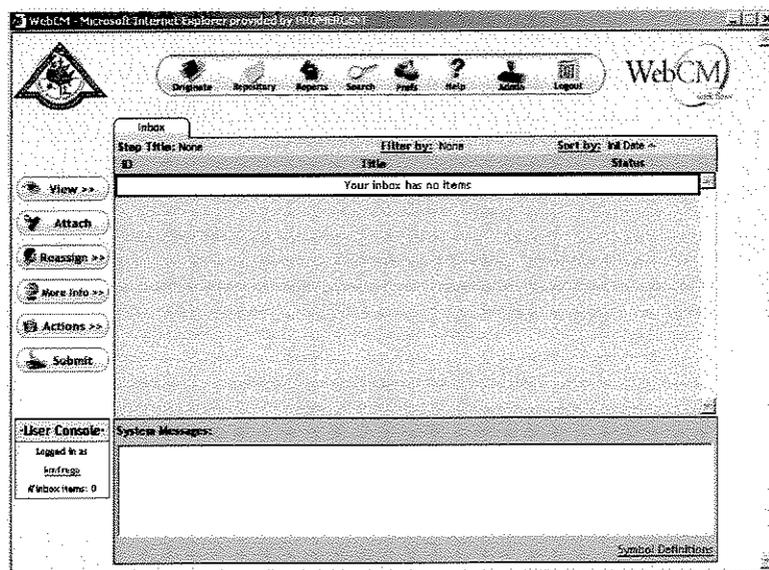


Valid WebCM users may access the WebCM application through the WebCM Portal at <http://webcm.faa.gov>. Complete the following steps to log into the WebCM application:

- (1) Within the WebCM Login portlet, enter your User Name.
- (2) Enter your Password.
- (3) Click the "Login" button.

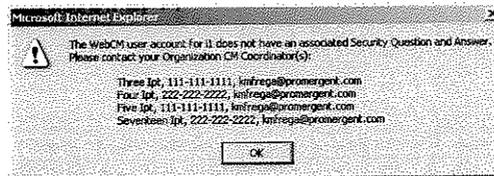


You will be presented with your WebCM Inbox.

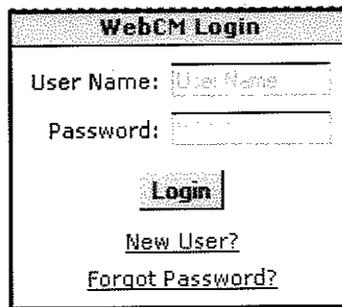


If you have forgotten your password or your account has been locked by attempting to login unsuccessfully three consecutive times, request a new password via the WebCM Portal.

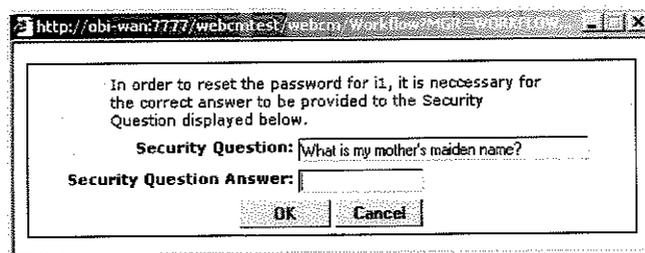
Please know that if you have no Security Question defined the system will not allow you to request a reset of your password electronically. If you have no security question defined, the system will prompt you to contact your organizational CM Coordinator for further assistance.



The contact information including phone number and e-mail address is available for each organizational CM Coordinator.



- (1) From the WebCM Login portlet, enter your User Name.
- (2) Click the "Forgot Password?" link.



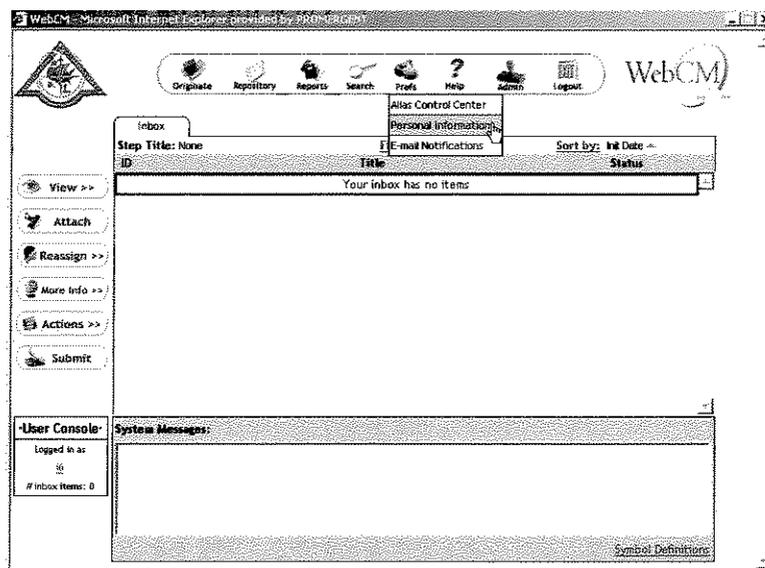
- (3) Provide your Security Question Answer.
- (4) Click the "OK" button.

A temporary password will be sent to the e-mail address in the profile of your user account. The next time you log into the WebCM application, you must reset your password to something memorable by you.

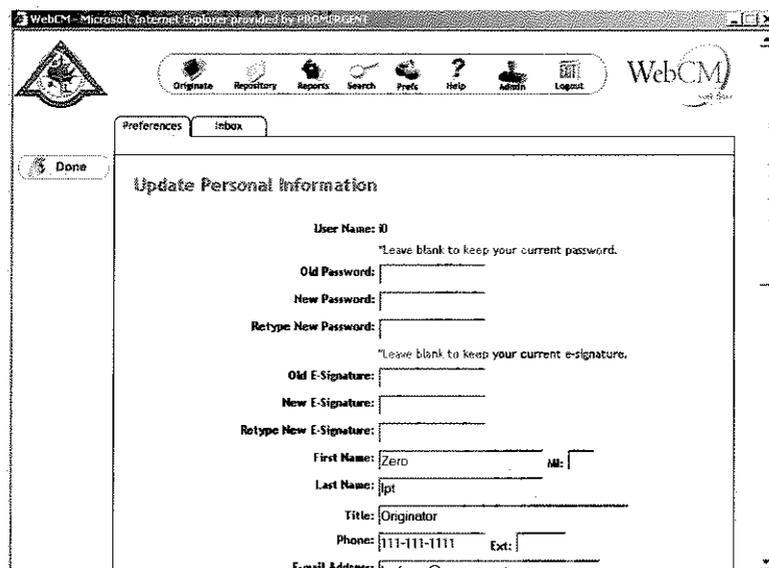
Know that answering your security question incorrectly three consecutive times will cause your account to lock. If this occurs, please contact one of your organizational CM Coordinators for assistance. If your organization is configured to unlock automatically after a defined number of minutes, you may attempt to answer your security question correctly after that amount of time has passed.

You may view or modify your personal information at any time via the User Console or from the Navigation Bar. To do so, complete the following steps:

- (1) From the Navigation Bar, click the "Prefs" button.
- (2) Select the "Personal Information" option.



The Update Personal Information page contains all of your user WebCM user account details.



- (3) Update your information as needed. Know that a WebCM administrator must update any organizational changes.
- (4) Click the "Done" button. You will return to your Inbox.

# Inbox

## Topics:

- *Refreshing the Inbox*
- *User Console*
- *Finding work items - <Ctrl/F>*
- *Printing the Inbox*
- *Sort workaround for the Actions problem*
- *Verify review sent to correct organization*

## Documents:

- *Inbox Overview*
  - *Discussion – Overview of WebCM Inbox*
- *Sort By*
- *Filter By*
- *Quick Details*

# Inbox Overview

## Discussion - Overview of WebCM Inbox



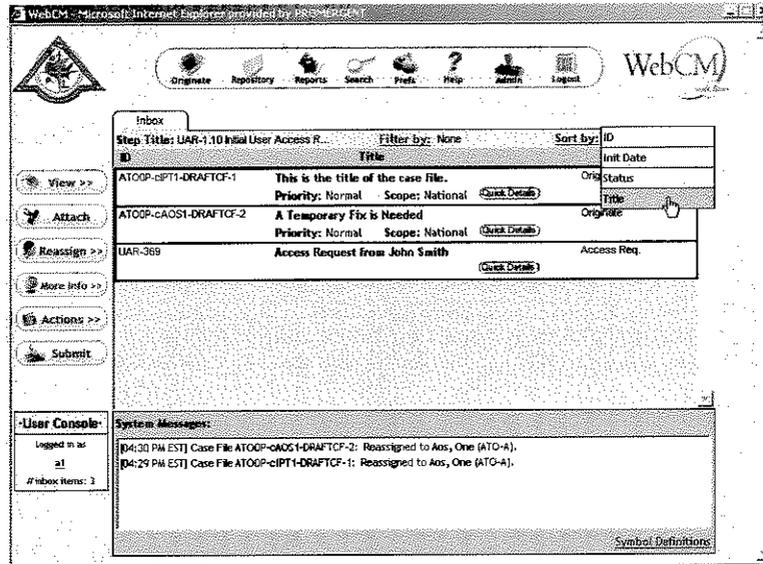
The screenshot shows the WebCM inbox interface with several labeled components:

- Tab Bar:** Located at the top left, containing buttons for 'Inbox', 'More Info', 'Reassign', 'My Work Items', and 'Alerts'.
- Inbox Task Buttons:** A vertical bar on the left side of the inbox table containing buttons for 'View >>', 'Attach', 'Reassign >>', 'More Info >>', 'Actions >>', and 'Submit'.
- Navigation Bar:** Located at the top right, containing the WebCM logo and a 'Logout' button.
- Inbox Symbols:** A row of icons (envelope, magnifying glass, etc.) located above the inbox table.
- Table:** The central inbox table with columns for 'Title', 'Filter by: None', and 'Status'. It contains three rows of task entries:
 

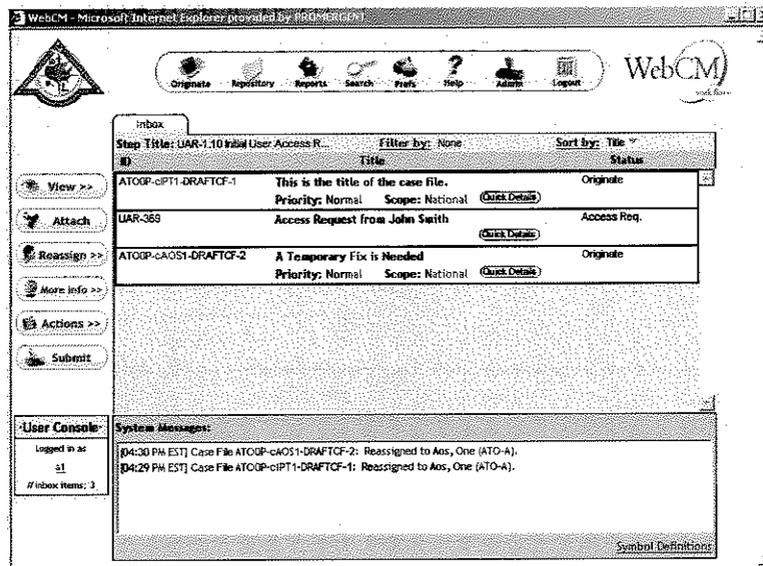
Title	Filter by: None	Status
GL603 DARC 8	Re-label all cables for DARC Priority: Normal Scope: Local	Envelope Dist
MOV B DARC DR4F DF 2613	Replace fixed ground software redware Priority: Normal Scope: Local	Assign
GL603 DARC 8	Upgrade radar system in tower 2 Priority: Normal Scope: Local	Assign
- User Console:** A box at the bottom left showing 'Logged in as: [username]' and 'When logged in: [time]'. It is labeled 'User Console'.
- System Messages Text Box:** A box at the bottom right containing a system message: 'System Messages: [4:15 PM EST: Case File GL603-DARC-8: Attached File pr\_3589.txt]'. It is labeled 'System Messages Text Box'.
- Work Items:** A box at the bottom right containing a list of work items, with one item labeled 'Symbol\_3589.txt'. It is labeled 'Work Items'.
- Quick Details Button:** A button at the bottom right labeled 'Quick Details Button'.

By default, your Inbox sorts ascending by initiation date ("Init Date"). Complete the following steps to sort the items in your Inbox:

- (1) From the Inbox, click the "Sort by" link.
- (2) Select a sort option.



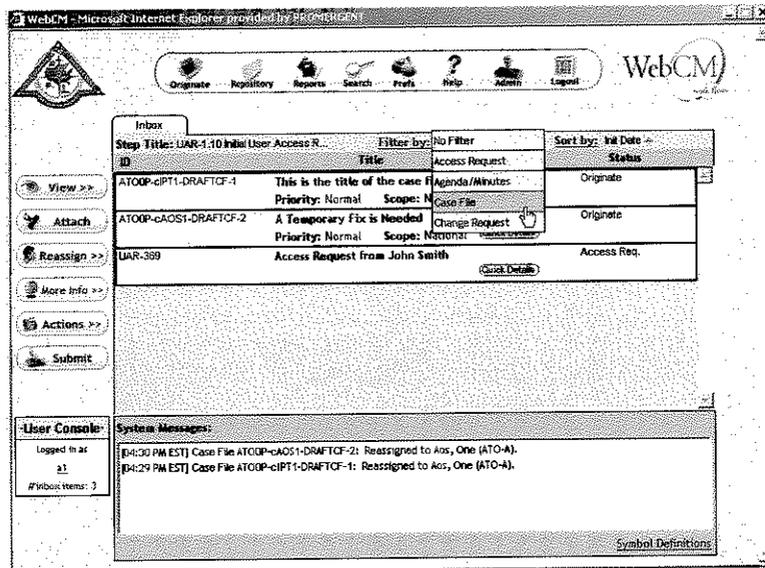
Your Inbox will display only work items based on the selected sort option.



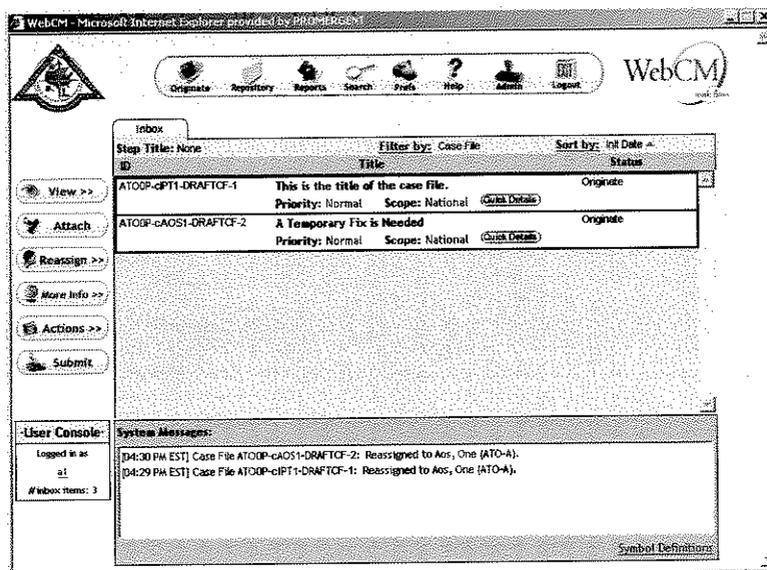
- (3) Click the arrow next to the sort option to sort ascending or descending.

By default, there is no filter on your Inbox and all work items display. Complete the following steps to filter the items in your Inbox:

- (1) From the Inbox, click the "Filter by" link.
- (2) Select a filter option.



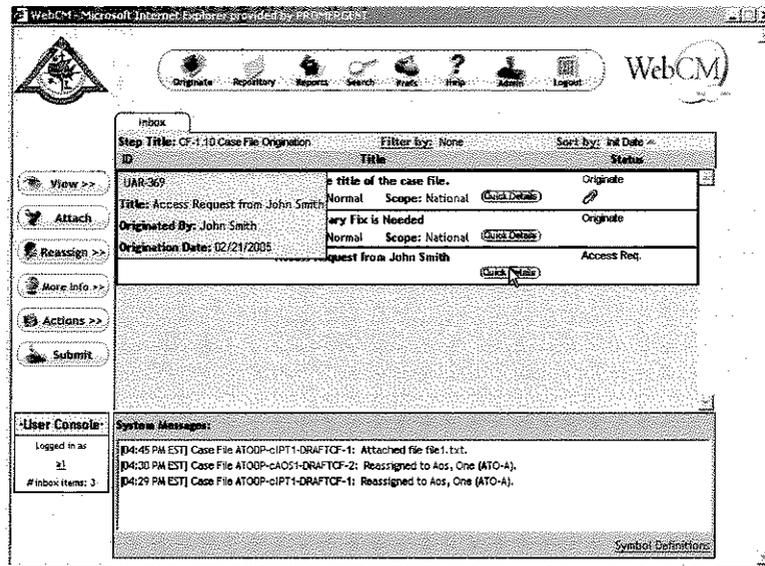
Your Inbox will display only work items based on the selected filter option.



Know that the User Console always displays the total number of items assigned to you regardless of the filter in use.

The Quick Details button displays the summary information of the associated work item.

- (1) View the brief summary information of an item in your Inbox by moving the mouse over the "Quick Details" button.



# Origination

## Topics:

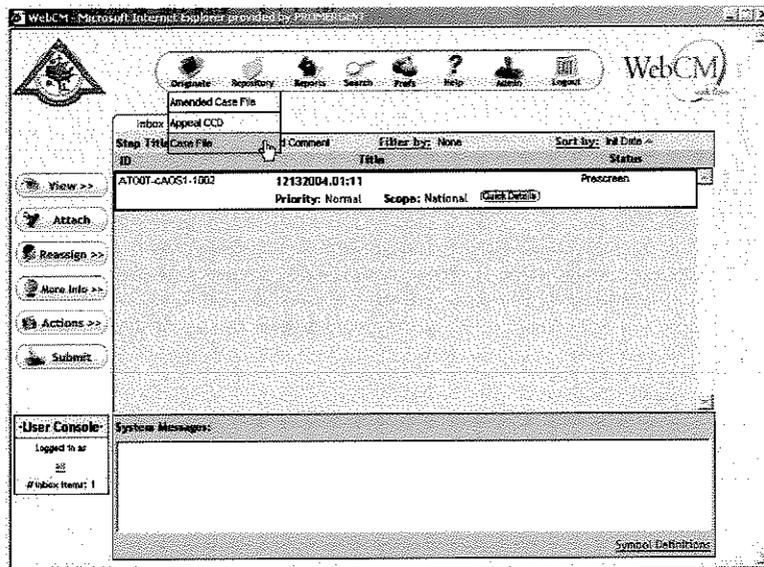
- *Entering text in MS Word first – can use spell-check, but must avoid special characters*
- *CNSRM – use Recall to get case file number to add to form*

## Documents:

- *Originate Case File*
- *Inbox Overview*
  - *Discussion – My Work Items Tab*

The Case File/NCP prepared with FAA Form 1800-2 is used to propose changes to or establish baselines of NAS systems/subsystems and their associated documentation. Complete the following detailed steps to originate a Case File:

- (1) Click the "Originate" button.
- (2) Select the "Case File" option.



For Case File origination, only blocks 1 through 22 on page one apply. Page two of form 1800-2 is read-only. As the system collects information throughout the Case File/NCP/CCD workflow, the system records and populates the information in the appropriate blocks on page two of the FAA form.

CASE FILE/NAS CHANGE PROPOSAL				
(PLEASE TYPE OR PRINT NEATLY)				Page 1 of 2
1. Case File Number	2. FOR	Case File Received Date	NCP Issuance Date	NCP Number
ATOOT-002	NA1			
3. Scope of Change*				
<input type="checkbox"/> Local	<input type="checkbox"/> National	<input type="checkbox"/> Safety	<input type="checkbox"/> Technical Upgrade	<input type="checkbox"/> Systems Interface
<input type="checkbox"/> Test		<input type="checkbox"/> Requirements Change	<input type="checkbox"/> Design Error	<input type="checkbox"/> Parts Unavailability
		<input type="checkbox"/> Baseline	<input type="checkbox"/> Other	
5. Priority*				
<input type="checkbox"/> Normal				
<input type="checkbox"/> Time-Critical				
6. Justification of Time Critical/Urgent Priority				
7. Supplemental Change Form*				
<input type="checkbox"/> ECR/ECP <input type="checkbox"/> TES <input checked="" type="checkbox"/> N/A				
7a. Supplemental Change No. _____				

### (3) Block 1, Case File Number:

While the default value of the organization displayed in block 1 is the one in which you belong, you are able to select from a list of all organizations in the system. Additionally, you may select from a list of all CIs in the system.

- The first 5 alphanumeric characters identify originating organization (e.g., AL462; STLAF; ZLAAT; TR230, etc.)
- The center group is a maximum of five characters and represents the acronym for the subsystem the case file is affecting (for baselined systems this acronym is found in NAS-MD-001 otherwise this will correspond to the Facility, Service and Equipment Profile (FSEP) acronym for the subsystem, (e.g., CD, AFSS, EARTS, etc.).
- The last group of three digits denotes consecutive number assigned by the system based on the originator's organization for the specific subsystem identified in the center group (e.g., 001, 002, ....., 999)
  - Note: Numbers are assigned consecutively for the life of the system and do not start over again at the beginning of the calendar year.
- A capital letter added at the end of a case file number denotes an amendment to that case file (e.g. A, B, C, etc.)

### Block 2, For CM Use:

Once the Case File is processed up to and through Control Desk Evaluation, the system automatically populates the Case File Received Date, NCP Issuance Date, and the NCP Number.

### (4) Block 3, Scope of Change:

Block 3 is required during Case File origination.

- A Local Case File applies to one or more identified sites, as indicated in block 17, and is dependent upon the change proposed. Approval of Local Case Files may be either at the Headquarters or at the Regional Configuration Control Board level.
- A Test Case File applies to one or more identified sites and is approved at the Headquarters Configuration Control Board Level for a limited duration specified in the CCD.
- A National Case File is applicable to all items of a type specified and is approved at the Headquarters Configuration Control Board level.

### (5) Block 4, Reason for Change:

Block 4 is required during Case File origination.

- Safety - correction of a deficiency that is required primarily to eliminate an unsafe condition
- Technical Upgrade - a proposal to incorporate advanced technology into an existing system, piece of equipment, etc, either hardware or software
- Systems Interface - a proposal dealing with system hardware and/or software and documents that are considered the "go between" enabling different systems to interact. This includes communications, power, etc.
- Requirements Change - a proposal to add a new requirement or change an existing requirement to a system, piece of equipment, etc.

- Design Error - a condition caused directly by human engineering error or design shortcomings. (Do not confuse with obsolete, antiquated or non-designed items or fixes.)
- Parts Unavailability - a proposal to incorporate a new component/part into an existing system, piece of equipment, or to replace a part no longer being manufactured.
- Baselineing - documenting a specific configuration including hardware, software, firmware, test equipment, power and facility space. This includes the documentation to define the configuration of specifications, plans, drawings, manuals, etc.
- Other - a change that does not fit into any of the previous categories. If "Other" is selected, provide an explanation.

**(6) Block 5, Priority:**

Select the appropriate priority and provide justification as necessary in block 6:

- Normal is the classification for Case Files that do not meet criteria of urgent or time-critical.
- Time Critical is the classification restricted to changes requiring expedited processing (for example, need CCD by certain date to support schedule of other projects). A reason and required date must be specified in block 6.
- Urgent is the classification for changes that will prevent a prolonged outage or catastrophic failure to operational systems or correct unsafe conditions (usually to document a fix already made for safety reasons). Include explanation under justification in block 6.

**(7) Block 6, Justification of Time Critical/Urgent Priority:**

If block 5 is marked Time-Critical or Urgent priority, justification must be provided.

**(8) Block 7, Supplementation Change Form:**

Block 7 is used to identify initiating change documentation such as Engineering Change Requests (ECR), Engineering Change Proposals (ECP), and Technical Employee Suggestions (TES). A copy of the change form used to initiate the Case File must be attached. If not applicable, select "N/A" in this block.

- 7a: if either "ECR/ECP" or "TES" is selected then the corresponding change number must be supplied.
- 7b: enter the date of initiation of either the ECR/ECP or TES change

The system automatically populates Block 8, Case File Originator, Block 9, Originator's Organization, and Block 10, Telephone Number with your user information.

**(9) Block 11, Case File Initiation Date:**

The current date is the default value. To select a different date, click the block and select a new date from the calendar.

**(10) Block 12, Type of Document Affected:**

The system automatically populates block 12 and is dependent on the selections made in block 13.

- CPFS - is the acronym for Computer Program Functional Specification
- SPEC - is the acronym for Specification
- MTBK - is the acronym for Maintenance Technical Handbook

- TI - is the acronym for Technical Instruction Book
- DWG- is the acronym for Drawing
- IRD/ICD - is the acronym for Interface Requirements Document /Interface Control Document.

**(11) Block 13, Baseline Document Number(s):**

The document number of each baseline document must be provided. Case Files to change a configuration item cannot be processed without identified documentation.

**(12) Block 14, CI Subsystem Designator:**

Block 14 is required during Case File origination.

- During the operational support phase it is intended to capture the specific model of the designated subsystem. Examples are ARSR-4, ASDE-3, and ASR-9. The Case File number should only reflect the generic identifier. Examples are ARSR, ASDE, and ASR. If a specific model is not applicable, use the subsystem designator identified in the center of the Case File number.
- During the acquisition phase, the FAA project is the CI designator acronym (for example, FBWTG).
- For changes that apply to the top level NAS documents, the CI designator "NAS" is used, as well as the specific subsystem designators affected (for example, ITWS, WAAS, and WARP).
- The designator "BLD" is used for changes affecting ARTCC- as built facility drawings. "ACF" is used for changes affecting both the standard and site-specific end state facility space drawings.

**(13) Block 15, FA Type:**

The FA Type Number should be provided from NAS-MD-001; otherwise, "N/A" should be used.

**(14) Block 16, CI Component Designator:**

When this kind of equipment or software module is affected by a proposed change, its CI designator should be cited in this block on the Case File exactly as it appears in NAS-MD-001.

**(15) Block 17, Facility Identifier (FACID):**

Block 17 is for Local and Test Case Files pertaining to hardware facilities. (Format: ABBBBBCCCC) This is an eleven-character field (for example, WPARSR\_BAM\_) with the first two characters "WP" representing the Region, the next five characters "ARSR\_" representing the Facility and the last four characters "BAM\_" representing the Location per the FSEP. Each character has a place and if there is no character for a given place, then an underscore "\_" is the proper character. Enter "N/A" for National Case Files.

**(16) Block 18, Facility Code (FACCODE):**

Block 18 is for Local and Test Case Files pertaining to hardware facilities. This is a five-digit code that breaks the facility down to its lowest unit as per FAA Order 1375.4. For example, ASDE-2 would be entered 45512. Enter "N/A" for National Case Files.

(17) Block 19, Cost Center Code:

The Cost Center Code is a five character alphanumeric code indicating the cost center against which change implementation is to be charged. This should be provided for Local and Test Case Files (for example, 12345).

(18) Block 20, System Software Version:

When making a change to software, the specific software version of the software being proposed for change is to be provided (for example, Version 4.2).

(19) Block 21, Title:

Indicate the subject of the change, being as descriptive as possible. For waivers to installation and siting criteria, include location and runway if applicable.

(20) Block 22, Description:

You must complete information pertaining to items (a), (b), (d), (e), and (f). Provide information pertaining to items (c), (g), and (h) as necessary.

- (a) **identification of problem** - provide complete information identifying the nature of problem, length of time it has existed, and so on.
- (b) **proposed change** - identify proposed solution(s) to the problem in as much detail as possible
- (c) **interface impact** - identify any known interface impacts involved with the proposed change
- (d) **cost estimate** - supply the estimated cost and the basis of estimate
- (e) **funding source** - identify the organization providing funding for change, if known
- (f) **benefits/risks** - state the benefits of this change or the impact of not making the change
- (g) **schedule** - provide a schedule for the change to be implemented whenever possible
- (h) **other** - identify the logistics and quality impacts in as much detail as possible. Additionally, this block shall also identify by title and number all companion Case Files/NCPs associated with this change.

(21) Worksheet 1:

Upon completion of page one, select "Worksheet 1" from the drop-down menu. You will be presented with page one of the Case File/NCP Worksheets. The system will populate the Case File Number and NCP Number blocks. Complete the rest of the worksheet as necessary.

**(22) Worksheet 2:**

Select “Worksheet 2” from the drop-down menu to include all relevant information on page two of the Case File/NCP Worksheets.

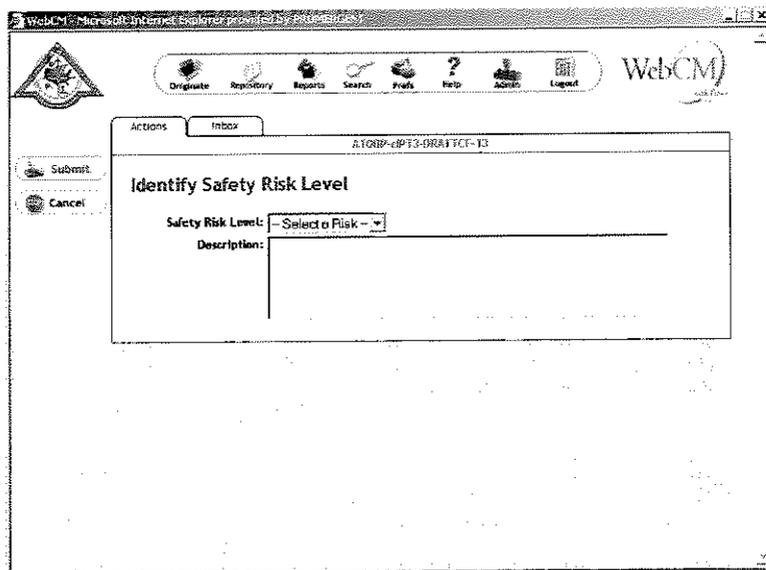
(23) Click the “Done” button to save changes and return to your Inbox.

The Case File will remain in your Inbox in the draft phase (“DRAFTCF”) until it is submitted to the next step in its associated workflow.

Once you have submitted the Case File to the next step in its workflow, the “DRAFTCF” text will be removed (i.e., the Case File is no longer a draft) and the system generates the real Case File number based on the combination of the CI and the organization specified in block 1 of the Case File.

**For Organizations Participating in the SRM Process**

During Case File origination, if the organization selected in block 1, Case File Number, on page one of the Case File forms is configured to implement the SRM process, upon submittal, the system will require you to recommend a safety risk level.



- (24) On the Safety Risk Level page, select a Safety Risk Level.
- (25) Enter a Description as applicable.
- (26) Click the "Submit" button for further processing.

# Inbox Overview

## Discussion - My Work Items Tab



My Work Items		Process Step		Recall	Withdraw	Reopen
ID	Title					
<a href="#">G5M01-SMO-24</a>	Upgrade radar system in tower 2	CF-2.20		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">G5M01-SMO-23</a>	Relabel all cables for DMRC	CF-2.20		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">G5M01-SMO-21</a>	SMO1 CF1	CF-2.30.6		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">G5M01-SMO-22</a>	Design and implement multi-point grounding system	CF-2.100.2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Displays all work items that you can currently withdraw, recall or reopen.
- The My Work Items tab will only be visible if you have one or more work items that are eligible to withdrawn, recalled or reopened.

# Inbox Overview



## Discussion - My Work Items Tab

- From the My Work Items page, you can perform the following tasks:
- Withdraw a work item -
  - The ability to delete work items in WebCM is very limited. It depends on the type of work item, and the rules that have been defined for that work item. However, WebCM does provide the capability to withdraw work items.
  - A work item that has been withdrawn is removed from further workflow processing. However, the work item record will remain in the system for information purposes. This is different than a work item that has been deleted, which is completely removed from the system. Once deleted, the work item cannot be referenced in any way, and it is as if the work item never existed.

# Inbox Overview

## Discussion - My Work Items Tab



- Withdraw a work item (continued) -
  - Note that you can only withdraw those work items that you originated yourself. In addition, your system administrator has the ability to define which workflow steps are eligible for withdrawal and which steps are not.
  
- Recall a work item -
  - When first submitted, many work items go to a designated supervisor for approval. While waiting in the supervisor's Inbox, it is not unusual for new information to become available that must be added to the work item. For this reason, WebCM provides the capability to recall work items.
  - A work item that is recalled is moved from the supervisor's Inbox to the Inbox of its originator so that it can be modified.
  - Note that the recall function is not applicable to all work items.

# Printing

## Topics:

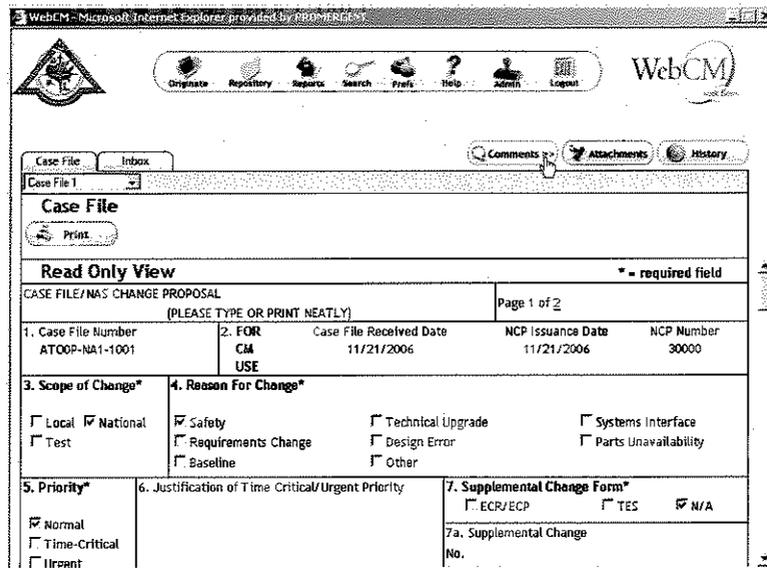
- *Setting margins – 0.25”*

## Documents:

- *Print Case File*

You are able to select one or more pages of the Case File/NCP/CCD forms for printing. To print a Case File/NCP/CCD, complete the following steps:

- (1) From your Inbox, select the work item.
- (2) Click the "View" button.
- (3) Select the "Selected Item" option.

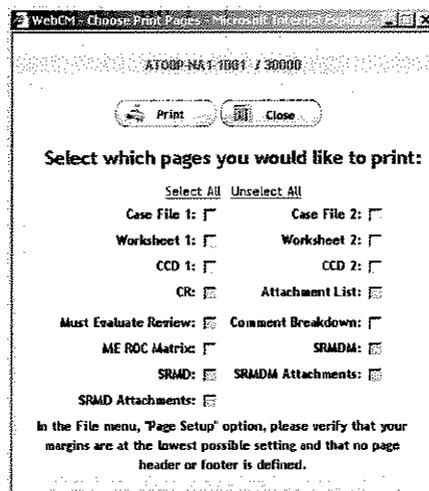


The screenshot shows a web browser window displaying the 'Case File' form in 'Read Only View' mode. The form contains the following sections:

- Case File:** Includes a 'Print' button.
- Read Only View:** A header indicating the form is read-only.
- CASE FILE/NAS CHANGE PROPOSAL:** A sub-header with a note '(PLEASE TYPE OR PRINT NEATLY)' and 'Page 1 of 2'.
- 1. Case File Number:** ATOOP-NA1-1001
- 2. FOR CM USE:** Case File Received Date: 11/21/2006, NCP Issuance Date: 11/21/2006, NCP Number: 30000
- 3. Scope of Change\*:**
  - Local  National
  - Test
- 4. Reason For Change\*:**
  - Safety
  - Requirements Change
  - Baseline
  - Technical Upgrade
  - Design Error
  - Other
  - Systems Interface
  - Parts Unavailability
- 5. Priority\*:**
  - Normal
  - Time-Critical
  - Urgent
- 6. Justification of Time Critical/Urgent Priority:** (Empty field)
- 7. Supplemental Change Form\*:**
  - ECR/ECP  YES  N/A
- 7a. Supplemental Change No.:** (Empty field)

When viewing a Case File in read-only mode a "Print" button is available.

- (4) Click the "Print" button.

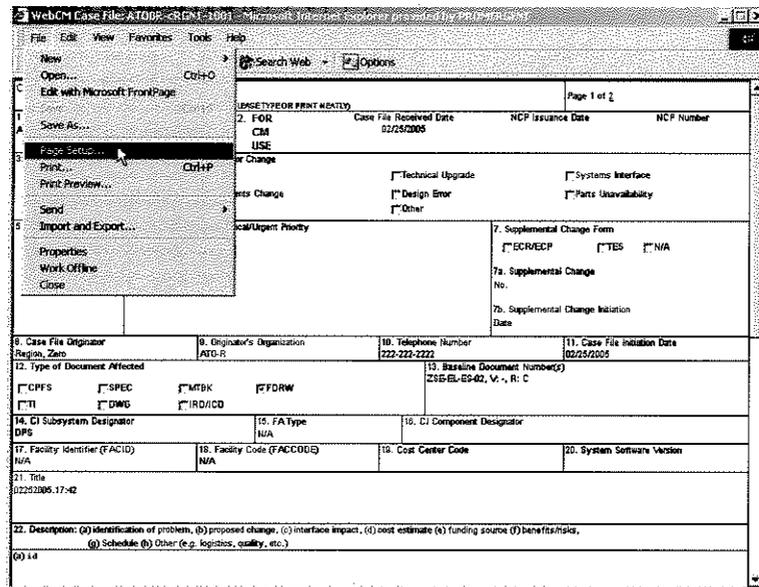


The screenshot shows a 'Choose Print Pages' dialog box with the following content:

- Header: ATOOP-NA1-1001 / 30000
- Buttons: Print, Close
- Section: **Select which pages you would like to print:**
- Options:
  - Select All Unselect All
  - Case File 1:  Case File 2:
  - Worksheet 1:  Worksheet 2:
  - CCD 1:  CCD 2:
  - CR:  Attachment List:
  - Must Evaluate Review:  Comment Breakdown:
  - ME ROC Matrix:  SRMDM:
  - SRMD:  SRMDM Attachments:
  - SRMD Attachments:
- Footnote: In the File menu, 'Page Setup' option, please verify that your margins are at the lowest possible setting and that no page header or footer is defined.

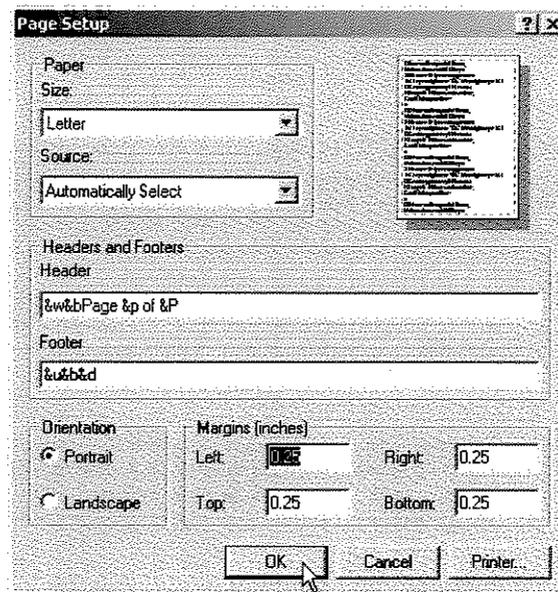
- (5) Select the checkbox of each page you want to print.
- (6) Click the "Print" button.

Notice that any block on the Case File/NCP/CCD forms that contains information that exceeds the block size, thus requiring a scroll bar when viewing, will display “see attached” in the block and all information for that block displays on the Addendums page of the form.



The screenshot shows a web browser window displaying the 'WebCM Case File: ATODP-CDU-12001' form. The 'File' menu is open, and the 'Page Setup...' option is highlighted. The form contains various fields for case information, including 'Case File Received Date' (02/25/2005), 'NCP Issuance Date', 'NCP Number', and 'Case File Initiation Date' (02/25/2005). There are also checkboxes for document types like 'CPFS', 'SPEC', 'MTBK', 'FDRW', 'TI', 'DWG', and 'IRD/CD'. A 'Description' field at the bottom contains a legend for codes (a) through (g).

- (7) From the Internet Explorer browser window, choose “File”.
- (8) Select the “Page Setup” option.



The screenshot shows the 'Page Setup' dialog box. The 'Paper' section is set to 'Letter' and 'Automatically Select'. The 'Orientation' is set to 'Portrait'. The 'Margins (inches)' section shows: Left: 0.25, Right: 0.25, Top: 0.25, Bottom: 0.25. The 'OK' button is highlighted with a mouse cursor.

- (9) On the Page Setup page, in the Margins section, set all margins to zero. Upon navigating to the next margin setting, the browser will automatically detect the true lowest possible setting.
- (10) Click the “OK” button.



## Step-by-Step Instructions Print Case File



- 
- (11) From the Internet Explorer browser window, choose "File".
  - (12) Select the "Print" option.

At this point, you will need to select the printer, indicate the number of copies needed, etc. to complete printing.

# Viewing Comments

## Topics:

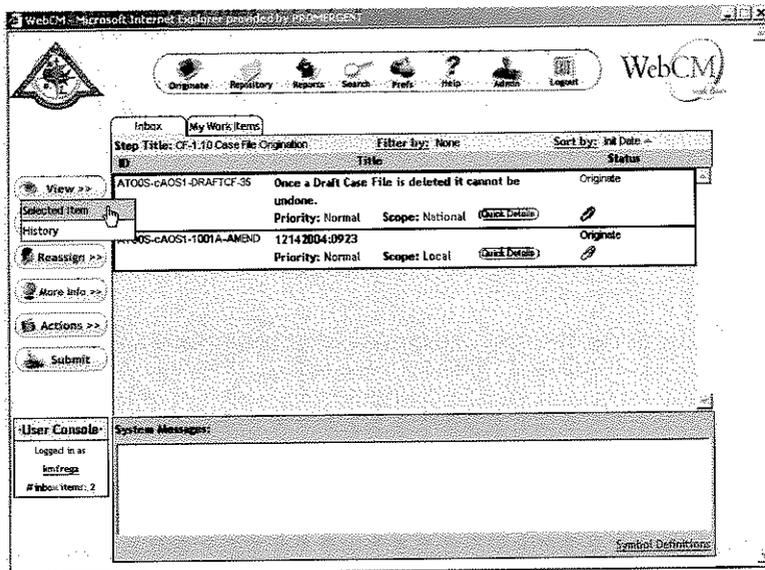
- *How to use filter criteria*
- *Displays included and excluded comments*
- *How to find comments entered by a manager while signing a review*
- *Finding information – <Ctrl/F>*

## Documents:

- *View Review Comments*

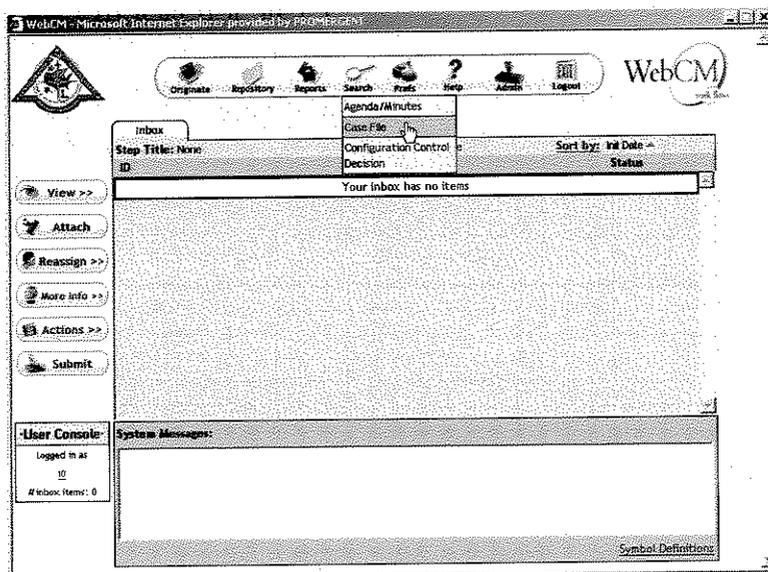
To view review comments of a work item complete the following steps:

- (1) From your Inbox, select the work item.
- (2) Click the "View" button.
- (3) Select the "Selected Item" option.



OR - If the work item is not in your Inbox,

- (4) From the Navigation Bar, click the "Search" button.
- (5) Select the "Case File" option.



- (6) Click the ID of the Case File.

From the read-only view of the work item.

- Click the “Comments” button.

Case File				
Case File 1				
Case File				
Read Only View				
CASE FILE/NAS CHANGE PROPOSAL				
(PLEASE TYPE OR PRINT NEATLY)			Page 1 of 2	
1. Case File Number ATOOP-NA1-1001	2. FOR CM USE	Case File Received Date 11/21/2006	NCP Issuance Date 11/21/2006	NCP Number 30000
3. Scope of Change*		4. Reason For Change*		
<input type="checkbox"/> Local <input checked="" type="checkbox"/> National <input type="checkbox"/> Test		<input checked="" type="checkbox"/> Safety <input type="checkbox"/> Technical Upgrade <input type="checkbox"/> Systems Interface <input type="checkbox"/> Requirements Change <input type="checkbox"/> Design Error <input type="checkbox"/> Parts Unavailability <input type="checkbox"/> Baseline <input type="checkbox"/> Other		
5. Priority*	6. Justification of Time Critical/Urgent Priority		7. Supplemental Change Form*	
<input checked="" type="checkbox"/> Normal <input type="checkbox"/> Time-Critical <input type="checkbox"/> Urgent			<input type="checkbox"/> ECR/ECP <input type="checkbox"/> TES <input checked="" type="checkbox"/> N/A	
			7a. Supplemental Change No.	

You will be presented with the Review Comments page.

From the Review Comments page, you may view and print in progress review comments submitted by any user for any of the review cycles.

- To view all available review comments (by any user), click the “Done” button. To view specific comments, enter the criteria in the available field or fields and click the “Done” button.

The review comments display in the bottom frame of the Review Comments window. To print the comments for the criteria entered, click the “Print” button.

# Viewing History

## Topics:

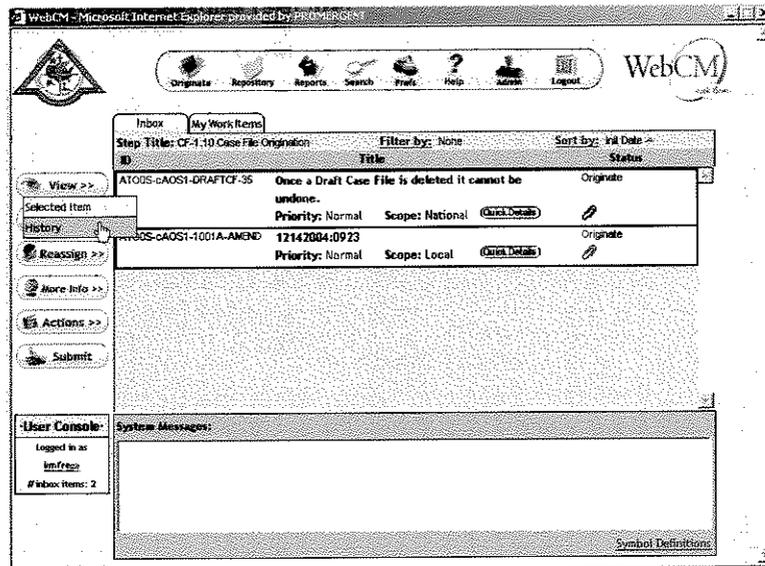
- *How to use filter criteria*
- *Finding information – <Ctrl/F>*
- *How to bring up the “old history” format*
- *When to use manual history*

## Documents:

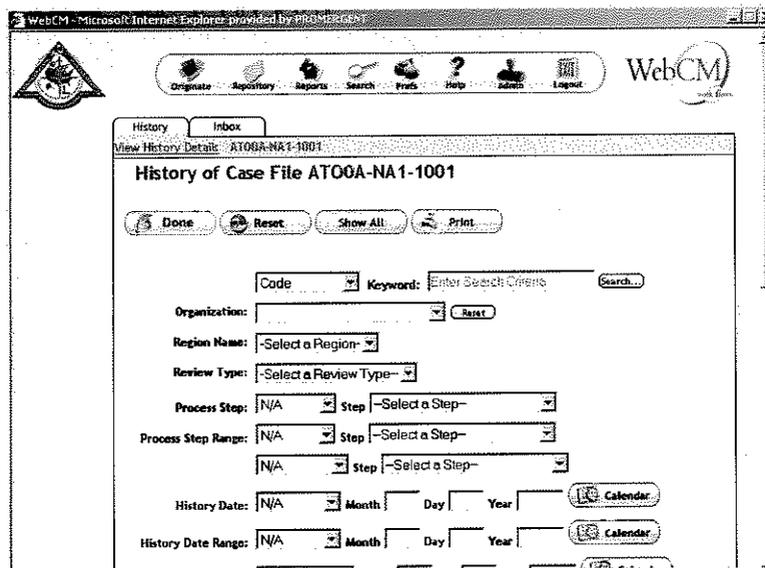
- *View History*
- *Create Manual History Item*

To view the history of a work item beginning from origination and up to its current status complete the following steps:

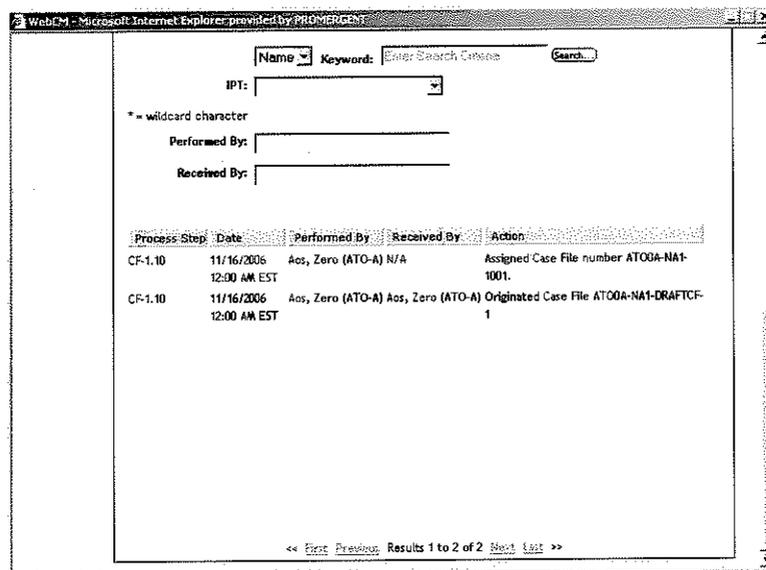
- (1) From your Inbox, select the work item.
- (2) Click the "View" button.
- (3) Select the "History" option.



The "History of Case File" page displays to allow you to "Show All" history records or to search for specific history records.



- (4) To show all history records for the work item, click the “Show All” button. To search for specific history records, enter the criteria in the desired fields and click the “Done” button. All search results display in the bottom frame of the page.



The screenshot shows a search interface with the following fields:

- Name:
- Keyword:
- IPI:
- \* = wildcard character
- Performed By:
- Received By:

Below the search fields is a table of history records:

Process Step	Date	Performed By	Received By	Action
CF-1.10	11/16/2006 12:00 AM EST	Aos, Zero (ATO-A)	N/A	Assigned Case File number ATOOA-NAI-1001.
CF-1.10	11/16/2006 12:00 AM EST	Aos, Zero (ATO-A)	Aos, Zero (ATO-A)	Originated Case File ATOOA-NAI-DRAFTCF-1

Navigation links at the bottom: << First Previous Results 1 to 2 of 2 Next Last >>

The history records are displayed in groups of 25. To navigate to the next or previous page click the “Next” or “Previous” links respectively.

Clicking the “Last” link will navigate to the oldest group of 25 records. For example, if the records displaying are a result of clicking the “Show All” button, clicking the “Last” link will navigate to the first 25 history entries ever recorded for the work item.

Clicking the “First” link will navigate to the most recent group of 25 records. For example, if the records displaying are a result of clicking the “Show All” button, clicking the “First” link will navigate to the newest 25 history entries recorded for the work item.

- (5) To view the details of the history including extended process information, click the “View History Details” link.  
 (6) Click the “Inbox” tab to return to the Inbox.

Complete the following steps to view the history of a Case File/NCP/CCD from the read-only view:

- (7) From your Inbox, select the work item.  
 (8) Click the “View” button.  
 (9) Click the “Selected Item” button.  
 (10) In the Read Only View, click the “History” button.

WebCM - Microsoft Internet Explorer provided by 192.168.1.1

Case File | Inbox | Comments | Attachments | History

Case File 1

Print

**Read Only View**

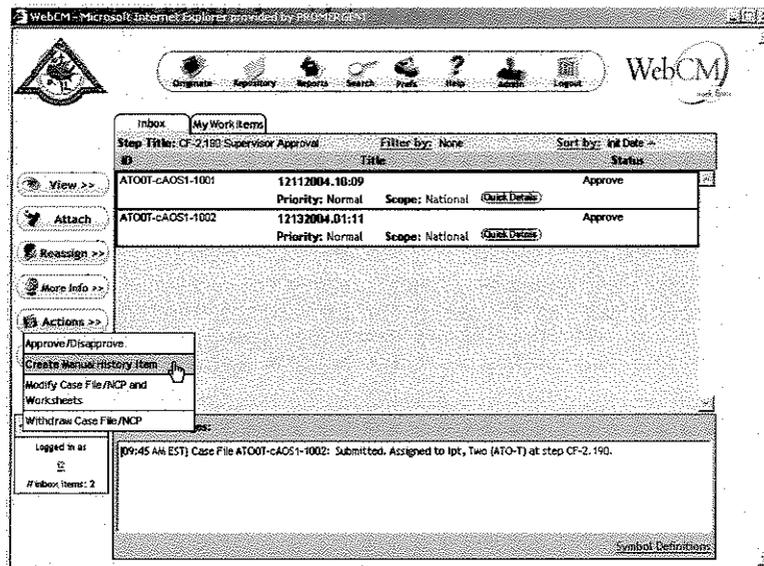
CASE FILE/AS CHANGE PROPOSAL Page 1 of 2

PLEASE PRINT MONTHLY

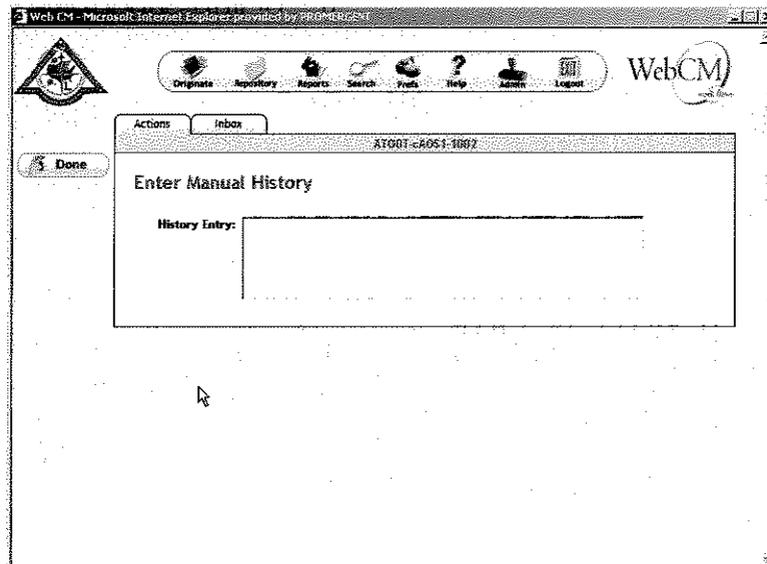
1. Case File Number ATOSS-CAOS1-1001A-AMEND		2. FOR CM USE	Case File Received Date	NCP Issuance Date	NCP Number
3. Scope of Change <input checked="" type="checkbox"/> Local <input type="checkbox"/> National <input type="checkbox"/> Test		4. Reason For Change <input checked="" type="checkbox"/> Safety <input type="checkbox"/> Department's Change <input type="checkbox"/> Baseline		<input type="checkbox"/> Technical Upgrade <input type="checkbox"/> Design Error <input type="checkbox"/> Other	
5. Priority <input checked="" type="checkbox"/> Normal <input type="checkbox"/> Time-Critical <input type="checkbox"/> Urgent		6. Justification of Time Critical/Urgent Priority		7. Supplemental Change Form <input type="checkbox"/> ECR/ECF <input checked="" type="checkbox"/> N/A	
8. Case File Originator Fraga, Mateo		9. Originator's Organization ORD-SM01		10. Telephone Number 315-414-8855	
				11. Case File Issuance Date 12/14/2004	

At any step in the process, you have the ability to create a manual history entry. History entries entered manually display in the history of the work item and will always be available for reference. Complete the following steps to create a manual history entry for a particular work item:

- (1) From your Inbox, select the work item.
- (2) Click the "Actions" button.
- (3) Select the "Create Manual History Item" option.



- (4) On the Enter Manual History page, enter your "History Entry".



- (5) Click the "Done" button to save changes and return to your Inbox. When returned to your Inbox, notice the manual entry displays in the system messages.

# Aliasing

## Topics:

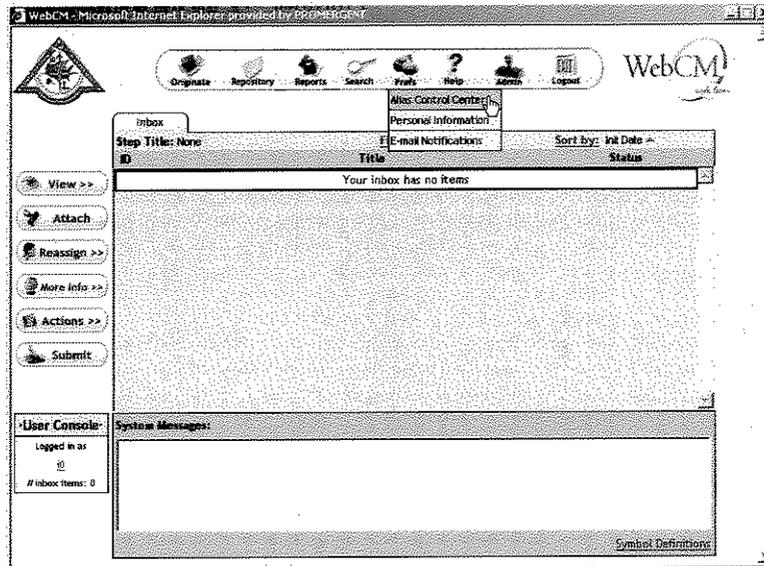
- *Why use aliasing?*
- *How to set up and use aliasing*
- *Can you alias to an alias?*

## Documents:

- *Quick Alias*
- *Assume User to Alias*
- *Stop Aliasing*

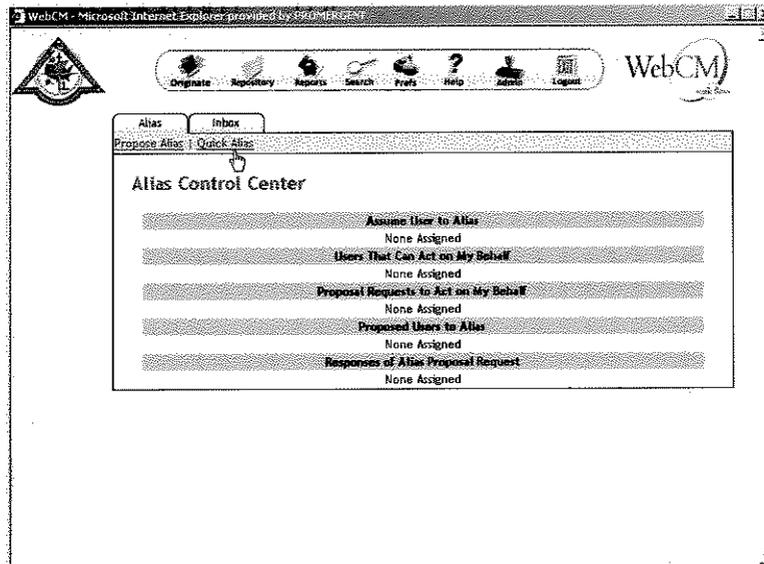
At any time, you may grant alias privileges to another WebCM user to access your Inbox. To do so, complete the following steps:

- (1) From the Navigation Bar, click the "Prefs" button.
- (2) Select the "Alias Control Center" option.

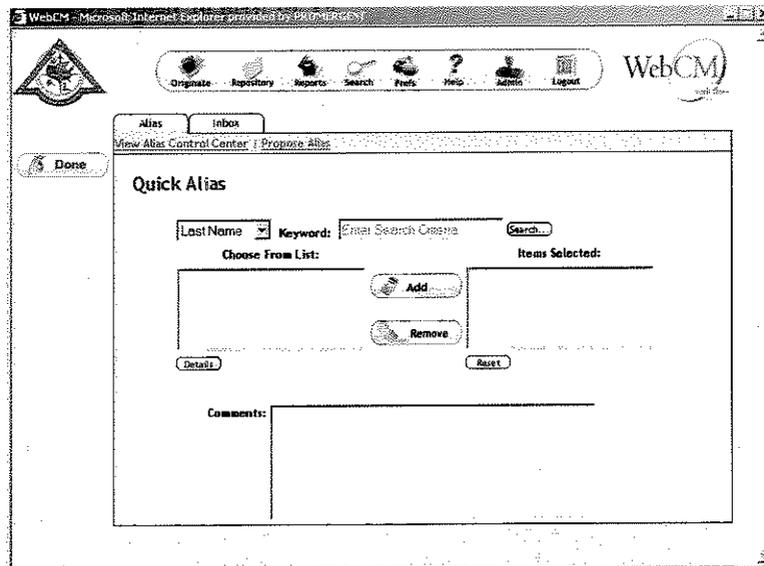


The Alias Control Center page displays all aliasing information and statuses.

- (3) Click the "Quick Alias" link.

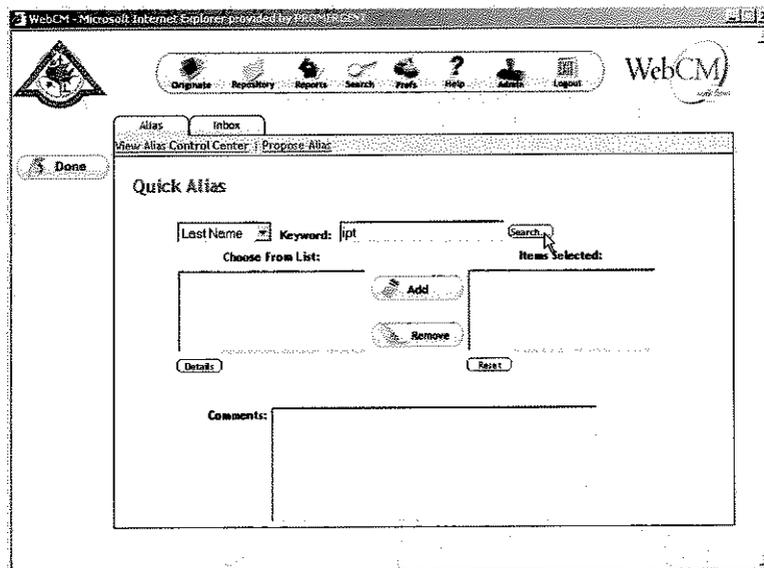


The Quick Alias page allows you to select one more WebCM users to grant privileges to access your Inbox.



To search for users:

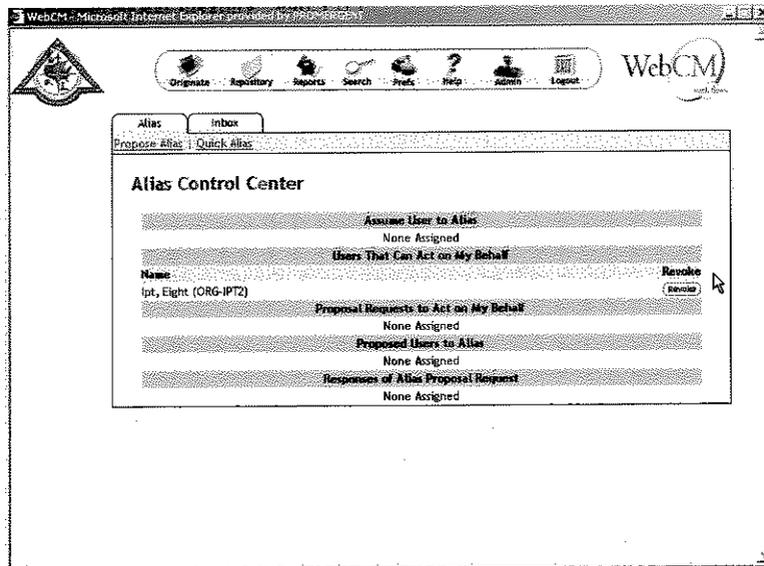
- (4) Select an option in the drop-down menu.
- (5) Enter your search criteria in the "Keyword" field.
- (6) Click the "Search" button.



Clicking the "Search" button with no value in the "Keyword" field will prompt you to confirm that you wish to return all objects in the system.

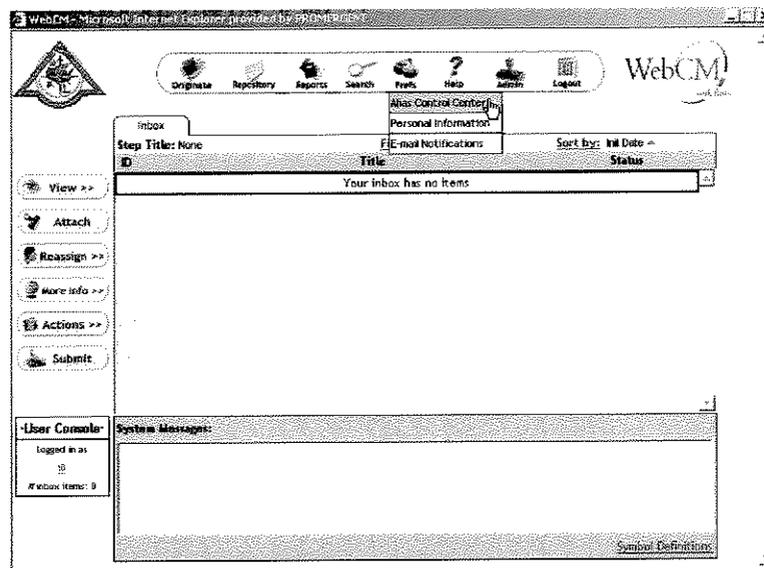
- (7) Select at least one user from the "Choose From List".
- (8) Enter Comments.
- (9) Click the "Done" button.

You will return to the Alias Control Center page. All selected users display in the “Users that Can Act on My Behalf” section. They will remain in this section until you revoke their privileges to access your Inbox.

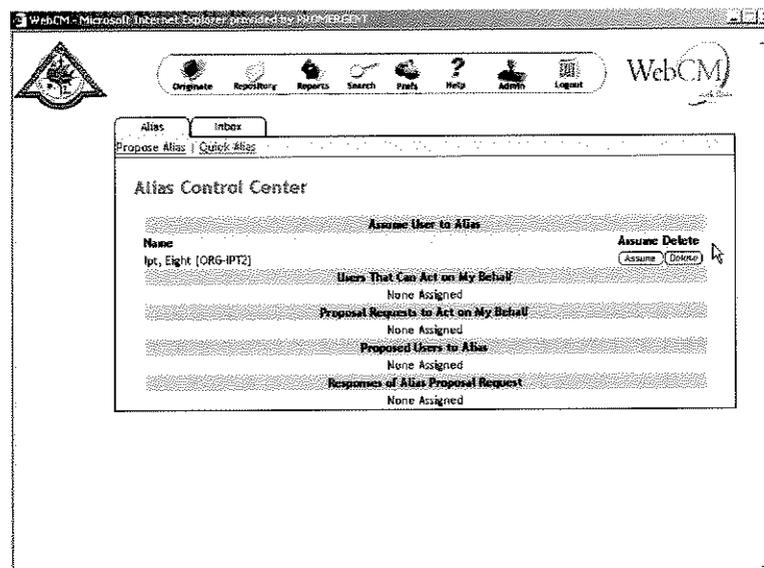


All users in which you have privileges to access their WebCM Inbox are available to you via the Alias Control Center. Complete the following steps to access another user's WebCM Inbox:

- (1) From the Navigation Bar, click the "Prefs" button.
- (2) Select the "Alias Control Center" option.

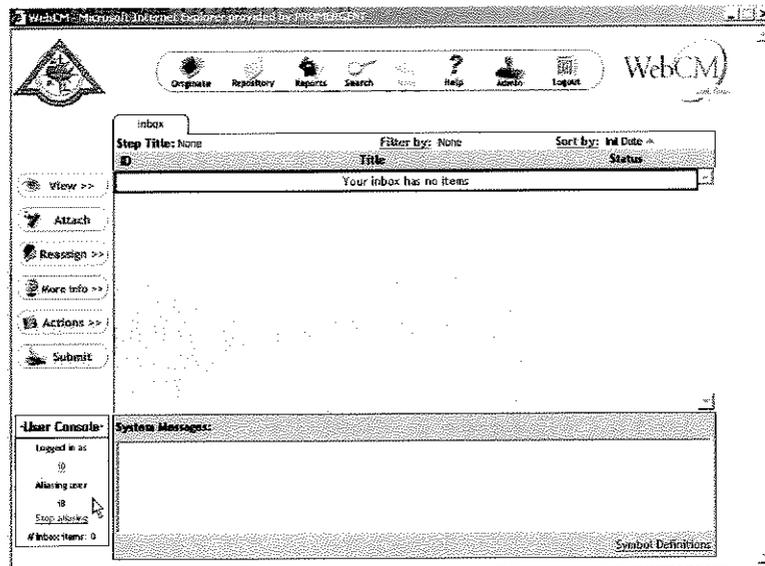


On the Alias Control Center page, all users in which you have the ability to access their Inbox display in the "Assume User to Alias" section.



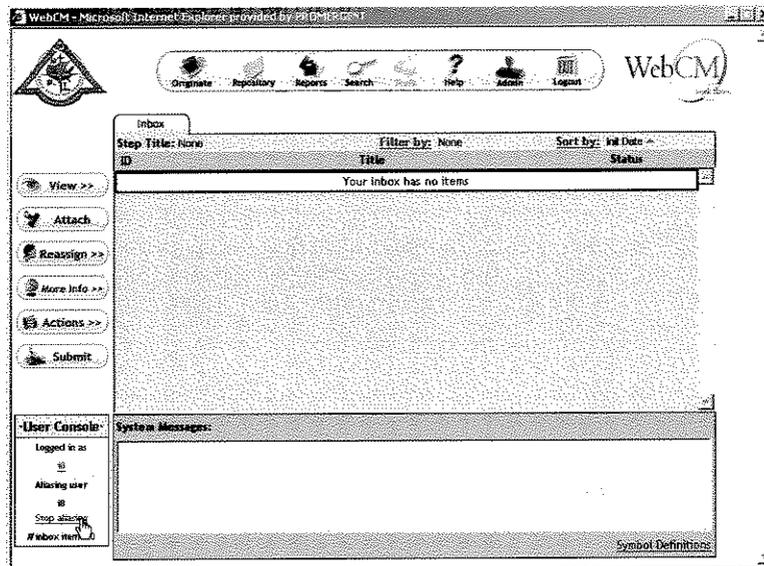
- (3) To access another user's Inbox, click the "Assume" button.

Immediately, you are presented with the associated user's Inbox. Notice the User Console displays the user you are aliasing and the "Prefs" button in the Navigation Bar is inactive.



You may stop aliasing another user at any time. To do so, complete the following steps:

- (1) From the Inbox, within the User Console, click the "Stop Aliasing" link.



Immediately, you will return to your own Inbox.

# Reassignment

## Topics:

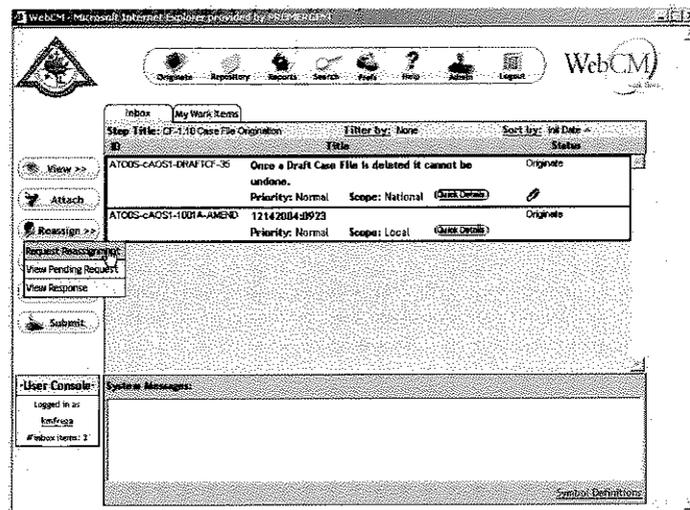
- *Two step process*
- *When to use Reassign – user vs. organization, specific role issue*
- *Cannot reassign ME organization review to another organization*

## Documents:

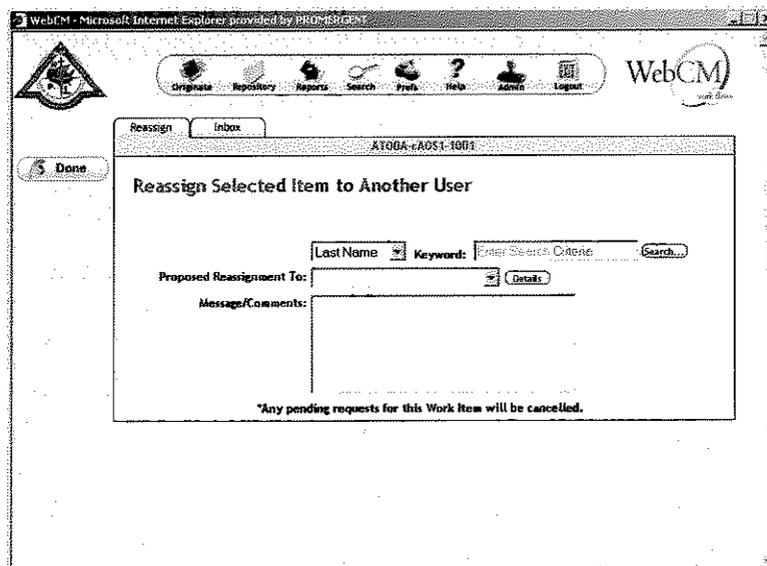
- *Request Reassignment*
- *Respond to Reassignment Request*
- *View a Reassignment Request Response*

You have the ability to submit a request to assign the current work item to another user. Complete the following steps to request reassignment of a work item:

- (1) From your Inbox, select the work item.
- (2) Click the “Reassign” button.
- (3) Select the “Request Reassignment” option.



From the Reassign Selected Item to Another User page, all users of the same role as you are available for selection. Remember that this is dependent on the status of the work item. Additionally, during the review process, only users playing the same role within the applicable organization are available for selection. For example, if you have a work item assigned to you as a CM Coordinator for organization “X”, the system will allow you to reassign only to those users that are also a CM Coordinator for organization “X”.

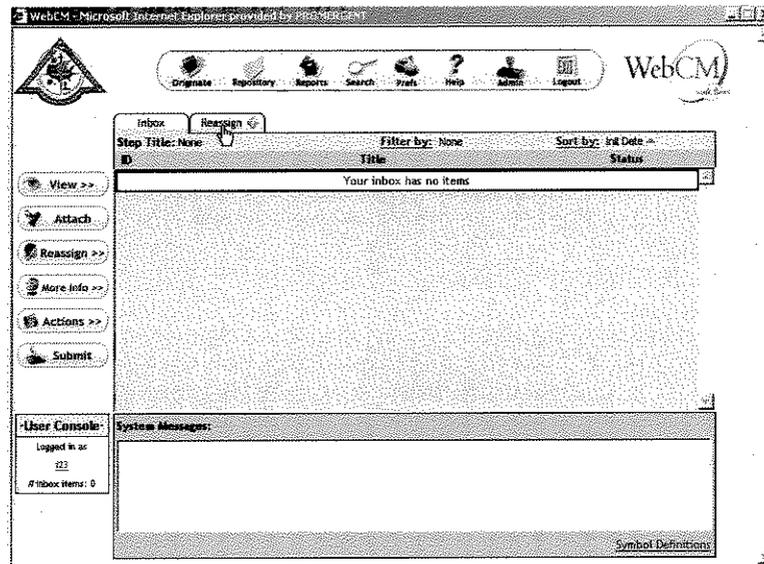


- (4) Select a user to Propose Reassignment To via the Keyword search function.
- (5) Enter a Message/Comments.
- (6) Click the "Done" button to save changes, process the request, and return to the Inbox. The system will send an e-mail to notify the selected user of the request.

Note that if you have a pending request, selecting another user will cancel the original request.

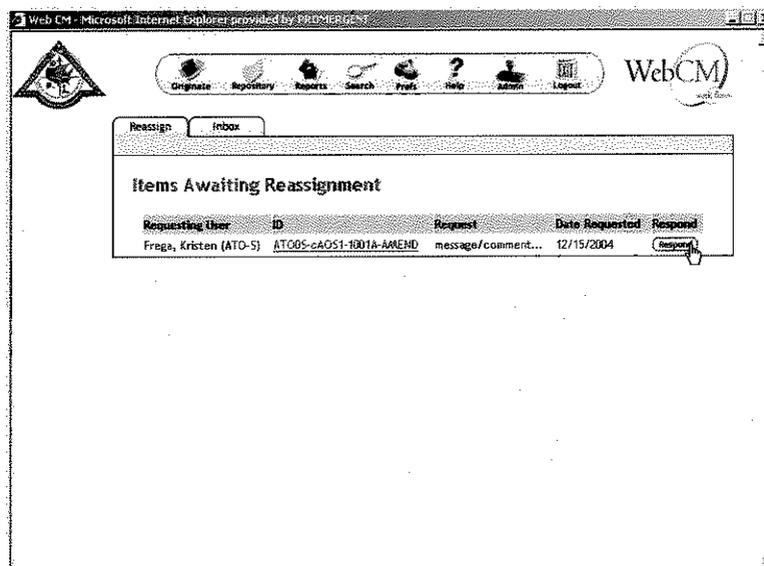
When a user requests reassignment of a work item to you, you will receive an e-mail to notify you of the request. Additionally, in your Inbox, there will be a "Reassign" tab to indicate the request. Complete the following steps to provide your response to the reassignment request from another user:

- (1) From your Inbox, click the "Reassign" tab.

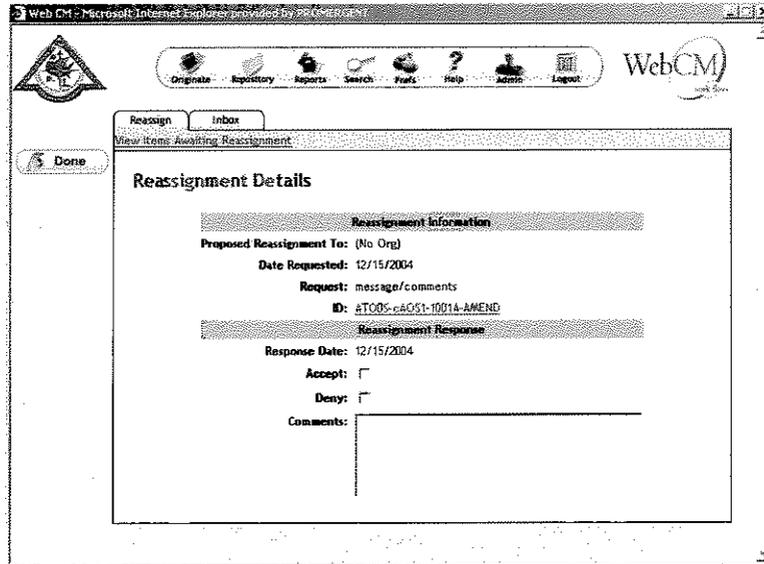


The Items Awaiting Reassignment displays all reassignment requests made to you. If needed, you may click the ID link to view the work item to which the request applies.

- (2) Click the "Respond" button.



The Reassignment Details page displays the request information including the requesting user and the reason for the request. If you need to return to the Items Awaiting Reassignment page, click the “View Items Awaiting Reassignment” link.



The screenshot shows a web browser window titled "Web CM: Microsoft Internet Explorer provided by PROMERGEN". The browser's address bar shows "http://www.promergent.com". The page content includes a navigation bar with icons for Originate, Repository, Reports, Search, Tools, Help, Admin, and Logout. Below the navigation bar, there are tabs for "Reassign" and "Inbox". A link "View Items Awaiting Reassignment" is visible. The main content area is titled "Reassignment Details" and contains the following information:

- Reassignment Information:**
  - Proposed Reassignment To: (No Org)
  - Date Requested: 12/15/2004
  - Request: message/comments
  - ID: ATCOS cACST-1001A-AMEND
- Reassignment Response:**
  - Response Date: 12/15/2004
  - Accept:
  - Deny:
  - Comments:

To accept to the request:

- (3) Select the “Accept” checkbox.
- (4) Click the “Done” button to save changes. The work item will now be available to you in your Inbox.  
If you had only one request, clicking the “Done” button will return you to your Inbox.  
If you have additional requests, clicking the “Done” button will return you to the Items Awaiting Reassignment page.

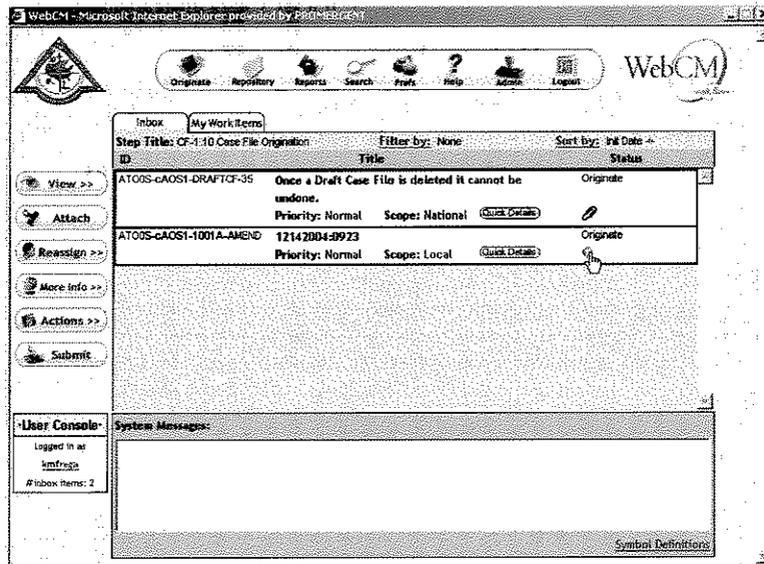
To deny the request:

- (5) Select the “Deny” checkbox.
- (6) Enter Comments.
- (7) Click the “Done” button to save changes and return to your Inbox.  
If you had only one request, clicking the “Done” button will return you to your Inbox.  
If you have additional requests, clicking the “Done” button will return you to the Items Awaiting Reassignment page.

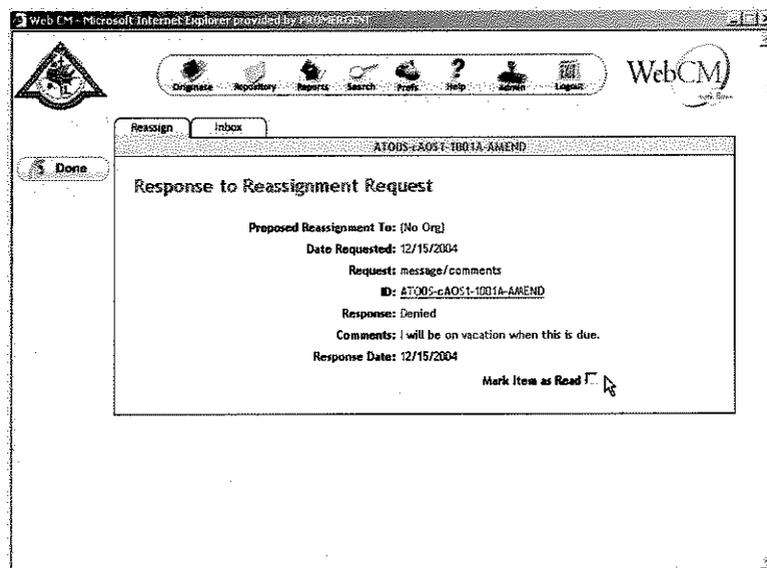
After responding, the request will no longer display and the system will send an e-mail to the requesting user to notify him/her of the response.

Once you have received a response to your request for reassignment, you will receive an e-mail to notify you of the response. Additionally, the work item will be marked with the "View Response of Reassignment Request" symbol. Complete the following steps to view the response to your request for reassignment:

- (1) From your Inbox, click the "View Response of Reassignment Request" symbol.

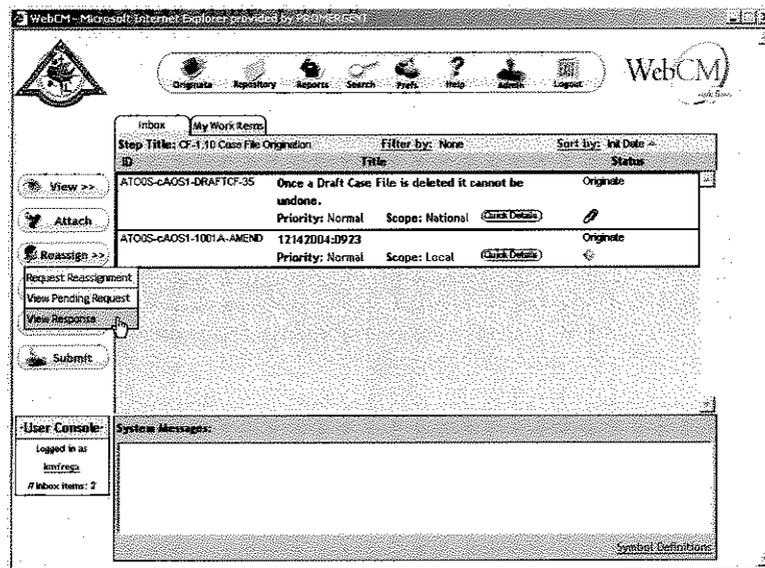


The Response to Reassignment Request page contains the detailed information regarding the response to your request for reassignment. Note that you will only receive a response for your reassignment request if the user denies the request.



- (2) To acknowledge the response and then be allowed to submit the work item for further processing, you must select the "Mark Item as Read" checkbox and then click the "Done" button to save changes. To leave the response unread, just click the "Done" button to return to the Inbox.

Also note, that from your Inbox, you may also view the response by selecting the work item, clicking the "Reassign" button and selecting the "View Response" option.



# Review Management

## Topics:

- *Return to Control Desk action for CCB CM Lead*
- *When do you use Submit?*
- *Why won't the Include box stay checked?*
- *Scrolling without the bar*
- *What do I do if I send a review to the wrong organization?*
- *How do I get a case file/NCP back to the originator to replace an attachment?*
- *Manager review dispositions*
  - *Approve*
  - *Disapprove (beware!)*
  - *Defer*
- *HQ CMO Review – intended for the originator's CMO, has option for rework*

## Documents:

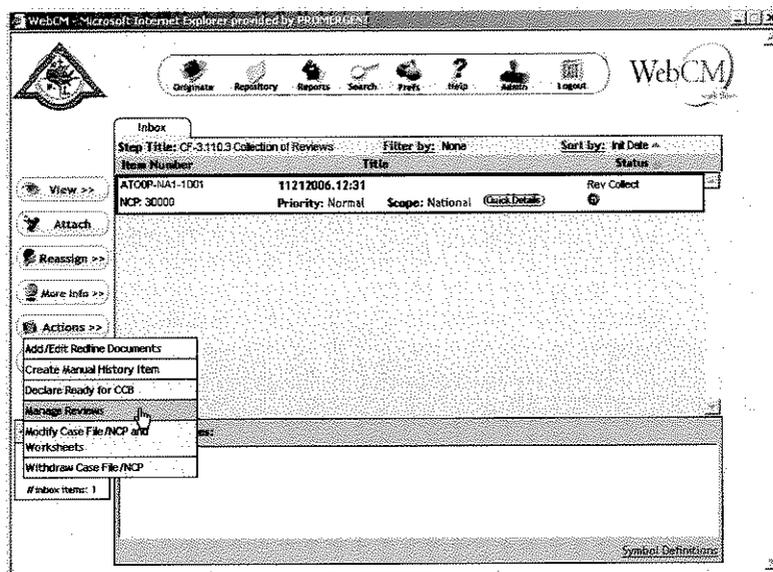
- *Manage Reviews*
- *Attach and View Files*
- *Approve/Disapprove*

WebCM users belonging to one or more of the following roles within WebCM have the ability to manage at least one review type (e.g., Facility/SMO Review, Regional Review, Must Evaluate Review, etc.):

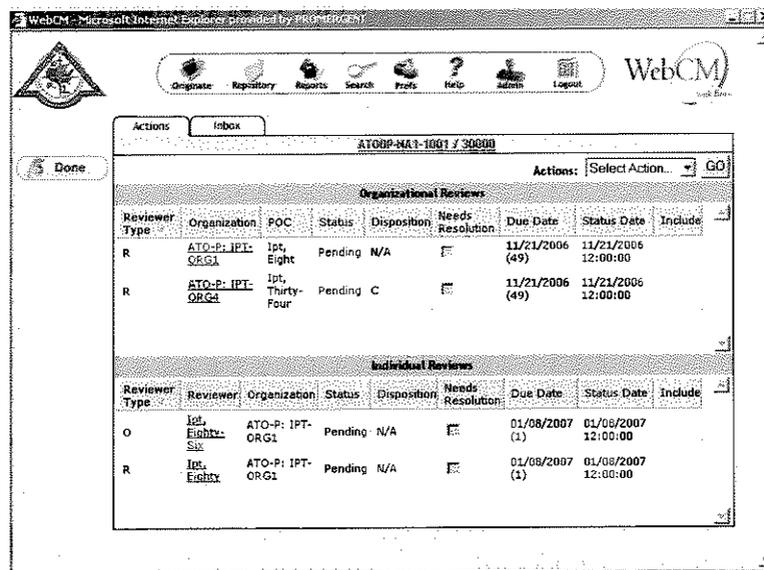
- AOS CM Coordinator
- CCB CM Lead
- Facility/SMO CM Coordinator
- Organizational CM Coordinator
- Organizational Safety Manager
- Regional CM Coordinator
- Safety Specialist

Complete the following steps to manage (or coordinate) a review:

- (1) From the Inbox, select the work item.
- (2) Click the “Actions” button.
- (3) Select the “Manage Reviews” option.



From the Manage Reviews page, you may view the status of all reviewers and perform actions for one or more reviewers. Additionally, you may view the details of the case file including attachments and the history log.



The screenshot shows a web browser window with the URL `WebCM - Microsoft Internet Explorer`. The page title is `ATOP-NAI-1001 / 30000`. There are navigation buttons for `Home`, `Organize`, `Repository`, `Reports`, `Search`, `Print`, `Help`, `Admin`, and `Logout`. The main content area is titled `Organizational Reviews` and `Individual Reviews`. The `Organizational Reviews` section contains two rows of data:

Reviewer Type	Organization	POC	Status	Disposition	Needs Resolution	Due Date	Status Date	Include
R	ATO-P: IPT-ORG1	Ipt. Eight	Pending	N/A	<input type="checkbox"/>	11/21/2006 (49)	11/21/2006 12:00:00	<input type="checkbox"/>
R	ATO-P: IPT-ORG1	Ipt. Thirty-Four	Pending	C	<input type="checkbox"/>	11/21/2006 (49)	11/21/2006 12:00:00	<input type="checkbox"/>

The `Individual Reviews` section contains two rows of data:

Reviewer Type	Reviewer	Organization	Status	Disposition	Needs Resolution	Due Date	Status Date	Include
O	Ipt. Eighty-Six	ATO-P: IPT-ORG1	Pending	N/A	<input type="checkbox"/>	01/08/2007 (1)	01/08/2007 12:00:00	<input type="checkbox"/>
R	Ipt. Eighty	ATO-P: IPT-ORG1	Pending	N/A	<input type="checkbox"/>	01/08/2007 (1)	01/08/2007 12:00:00	<input type="checkbox"/>

The Manage Reviews page lists all WebCM users distributed to for review. During review distribution, a reviewer must be categorized as an “Organizational Review” or an “Individual Reviewer”. Each reviewer then displays in their respective sections on the Manage Reviews page.

The “Review Type” column displays either the letter “R” or the letter “O” where “R” stands for Required and “O” stands for Optional. Meaning that in addition to identifying a category for each reviewer during distribution, a reviewer must be identified as a required or optional reviewer.

In the “Organizational Reviews” section:

- The “Organization” column lists the organization that is assigned to review the work item. Upon clicking the name of the organization, the Review Details page opens presenting the details of the review being conducted by the organization (e.g., the organizational disposition and sub-level reviewers).
- The “POC” column lists the point-of-contact for the organization conducting the sub-level review.

In the “Individual Reviews” section:

- The “Reviewer” column lists the individual person that is assigned to review the work item. Upon clicking the name of the reviewer, the Review Details page opens presenting the details of the review being conducted by the individual (e.g., review disposition and comments).
- The “Organization” column lists the organization to which the individual reviewer belongs.

The “Status” column displays the specific status for each reviewer. The possible values are as follows:

- Pending = the reviewer has not yet submitted comments
- Responded = the reviewer has submitted comments
- ROC = the comments have been assigned for resolution
- Approve ROC = the original reviewer has been assigned to accept/reject the resolution
- ROC Complete = the original reviewer has accepted the resolution of comments
- Auto-Submitted = the review was auto-submitted before the comment cycle was complete

The “Disposition” column displays the position that each reviewer is taking regarding the work item. The possible values are as follows:

- N/A = Not Applicable; “N/A” displays for a reviewer with the Status of “Pending”
- C = Concur
- NC = Non-Concur
- CwC = Concur with Comment
- NR = No Response; “NR” displays for a reviewer that was auto-submitted by the review coordinator

The “Needs Resolution” column displays whether or not the reviewer has asked for their review comments to be resolved. While the Status of the reviewer is “Pending” or “Auto-Submitted” the checkbox remains read-only. Once the reviewer responds, if the reviewer does indeed want resolution, upon receipt of their comments the “Needs Resolution” checkbox will be selected. However, the review coordinator has the ability to override the selection while the Status of the reviewer is “Responded”. The checkbox returns to being read-only for the Status of “ROC”, “Approve ROC”, and “ROC Complete”.

The “Due Date” column displays the date chosen by the review coordinator during review distribution for the reviewer to return their comments. A number shown in parenthesis and in red text denotes the number of days the comments are late.

The “Status Date” column displays the date of which the last action was taken for that reviewer. For example, if a reviewer responded yesterday, yesterday’s date displays as the Status Date. If the review coordinator then sends the comments for resolution today, the “Status Date” column updates to today’s date.

Once a reviewer submits their response, the “Include” column displays a selected checkbox. Only review comments that are specifically marked to be included are available on the change package forms. The review coordinate may include or exclude a reviewer’s comments at any time.

The “Actions” drop-down menu provides options for the reviewer coordinator to perform on one or more reviewers. To invoke an action click the “Go” button. The available actions are as follows:

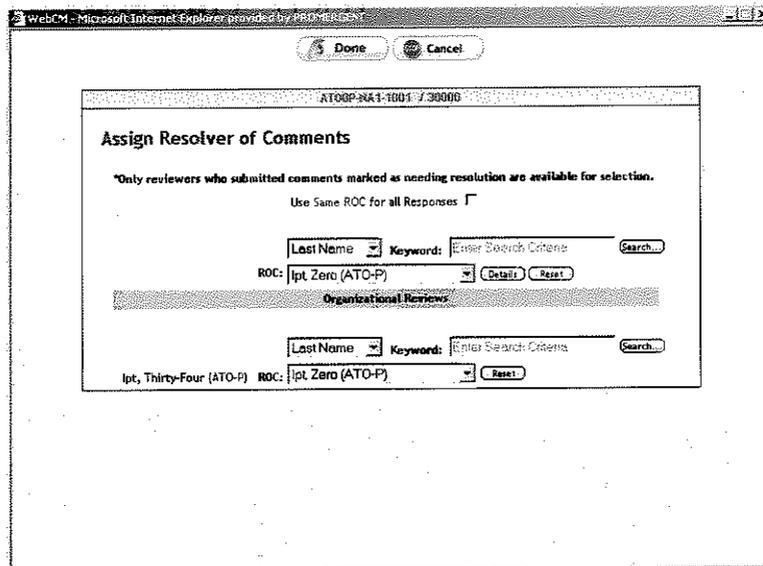
### Add Reviewers

- (1) Enter a Review Due Date: the due date assigned applies only to the new reviewers being added.
- (2) Additional individual/organizations can be selected to review the work item as long as they have not already been selected. The new reviewers will be listed in their respective sections (“Organizational Reviews” or “Individual Reviews”) on the Manage Reviews page.
- (3) Click the “Add Reviewers” button to immediately send a copy of the work item to the selected users for review and return to the Manage Reviews page.

## Alter Due Date

- (1) Select the “Alter Due Date” checkbox for the reviewers of which you want to change the review due date. Only reviewers with the Status of Pending, ROC, or Approve ROC are available for selection.
- (2) Enter a New Due Date.
- (3) Click the “Done” button. The new due date displays in the “Due Date” column on the Manage Reviews page.

### Assign ROC



- (1) Select the “Needs Resolution” checkbox for at least one responded reviewer.
- (2) From the “Actions” menu, select the “Assign ROC” option and click the “Go” button.
- (3) On the Assign Resolver of Comments page, you may select the “Use Same ROC for all Responses” checkbox to send all review comments (marked as needing resolution) to the same person for resolution. Otherwise, you must select a user separately for each review comments.
- (4) Click the “Done” button to immediately send the review comments for resolution and return to the Manage Reviews page. This action cannot be reversed. For each review comments sent for resolution, the “Status” column on the Manage Reviews page updates to the value “ROC”.

### Auto-Submit

Auto-Submit: Microsoft Internet Explorer provided by PROMERGENT

Done Cancel

ATCOP-NA-1-1001 / 38000

### Auto-Submit

\*Only reviewers with the Status of Pending, ROC, or Approve ROC are available for selection.

Organizational Reviews									
Reviewer Type	Organization	POC	Status	Disposition	Needs Resolution	Due Date	Status Date	Auto Submit	
R	ATO-P: IPT-ORG1	lot, Eight	Pending	N/A	No	11/21/2006	11/21/2006 12:00:00	<input type="checkbox"/>	

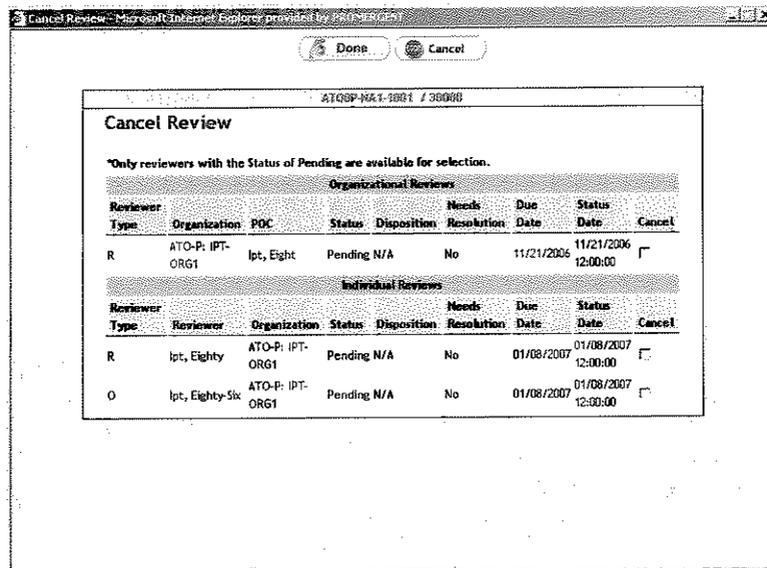
  

Individual Reviews									
Reviewer Type	Reviewer	Organization	Status	Disposition	Needs Resolution	Due Date	Status Date	Auto Submit	
R	lot, Eighty	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>	
O	lot, Eighty-Six	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>	

Only reviewers with the Status of Pending, ROC, or Approve ROC are available for selection. Auto-submitting a reviewer will remove the work item from their inbox. This action cannot be reversed. Once a reviewer is auto-submitted they will never be available to review the work item during the same review. Complete the following steps to auto-submit one or more reviewers:

- (1) On the Auto-Submit page, select the "Auto-Submit" checkbox for the reviewer(s) that no longer need to review the work item.
- (2) Click the "Done" button to immediately remove the work item from their inbox and return to the Manage Reviews page where the Status value is updated to "Auto-Submit" and the Disposition value is updated to "NR".

Cancel



**Cancel Review**

\*Only reviewers with the Status of Pending are available for selection.

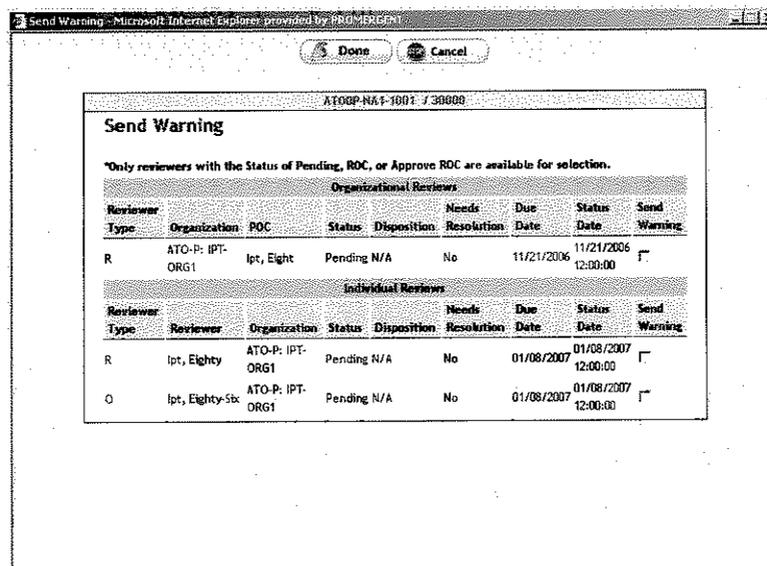
Organizational Reviews								
Reviewer Type	Organization	POC	Status	Disposition	Needs Resolution	Due Date	Status Date	Cancel
R	ATO-P: IPT-ORG1	Ipt, Eight	Pending	N/A	No	11/21/2006	11/21/2006 12:00:00	<input type="checkbox"/>

Individual Reviews								
Reviewer Type	Reviewer	Organization	Status	Disposition	Needs Resolution	Due Date	Status Date	Cancel
R	Ipt, Eighty	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>
O	Ipt, Eighty-Six	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>

Canceling a reviewer will remove the work item from their Inbox. If a reviewer is cancelled, the reviewer may be re-distributed to at any time via the “Add Reviewers” action. Only reviewers with the Status of “Pending” are available for selection. Complete the following steps to cancel one or more reviewers:

- (1) On the Cancel Review page, select the “Cancel” checkbox for the reviewer(s) you wish to revoke.
- (2) Click the “Done” button to remove the work item from the selected reviewer(s) and return to the Manage Reviews page where the reviewer(s) will no longer be listed.

## Send Warning



**Send Warning**

\*Only reviewers with the Status of Pending, RDC, or Approve RDC are available for selection.

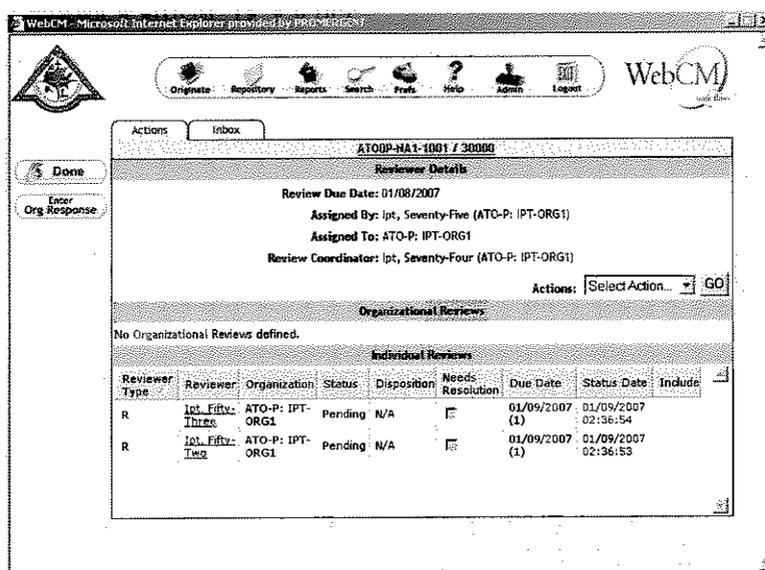
Organizational Reviews								
Reviewer Type	Organization	POC	Status	Disposition	Needs Resolution	Due Date	Status Date	Send Warning
R	ATO-P: IPT-ORG1	Ipt, Eight	Pending	N/A	No	11/21/2006	11/21/2006 12:00:00	<input type="checkbox"/>

Individual Reviews								
Reviewer Type	Reviewer	Organization	Status	Disposition	Needs Resolution	Due Date	Status Date	Send Warning
R	Ipt, Eighty	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>
O	Ipt, Eighty-Six	ATO-P: IPT-ORG1	Pending	N/A	No	01/08/2007	01/08/2007 12:00:00	<input type="checkbox"/>

Sending a warning to a reviewer will request the system to automatically send an e-mail notification to the reviewer to remind them of the review and the review due date. Only reviewers with the Status of Pending, ROC, or Approve ROC are available for selection. Complete the following steps to send a warning to one or more reviewers:

- (1) On the Send Warning page, select the “Send Warning” checkbox for the desired reviewer(s).
- (2) Click the “Done” button to immediately send an auto-generated e-mail notification from the system and return to the Manage Reviews page. The reviewer(s) Status and Disposition remain the same.

### Organizational Reviewer



The screenshot shows the 'Organizational Reviewer' page in a Microsoft Internet Explorer browser. The page title is 'ATOOP-NA1-1001 / 30000'. The 'Reviewer Details' section shows: Review Due Date: 01/08/2007, Assigned By: lpt, Seventy-Five (ATO-P: IPT-ORG1), Assigned To: ATO-P: IPT-ORG1, and Review Coordinator: lpt, Seventy-Four (ATO-P: IPT-ORG1). Below this, the 'Organizational Reviews' section states 'No Organizational Reviews defined.' The 'Individual Reviews' section contains a table with the following data:

Reviewer Type	Reviewer	Organization	Status	Disposition	Needs Resolution	Due Date	Status Date	Include
R	lpt, Fifty-Three	ATO-P: IPT-ORG1	Pending	N/A	<input type="checkbox"/>	01/09/2007 (1)	01/09/2007 02:36:54	<input type="checkbox"/>
R	lpt, Fifty-Two	ATO-P: IPT-ORG1	Pending	N/A	<input type="checkbox"/>	01/09/2007 (1)	01/09/2007 02:36:53	<input type="checkbox"/>

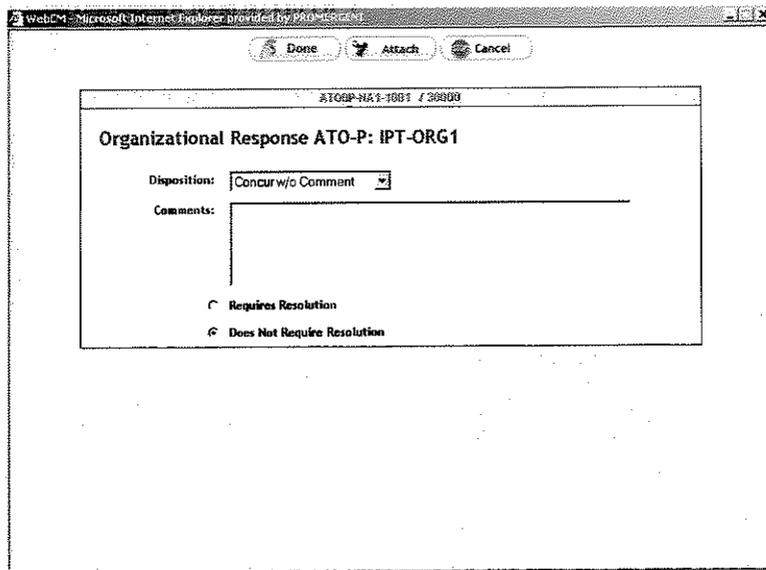
When receiving a work item as a point of contact for an organizational review, the Manage Reviews page contains the following information:

- Review Due Date - the due date assigned by the review coordinator upon distribution to the organization
- Assigned By - the name and organization that distributed for review
- Assigned To - the ATO Affiliation/Organizational Code and the name of the organization conducting the review
- Review Coordinator - the name and organization currently coordinating the review. Meaning that when the organization completes their review, submittal will return the comments to the current review coordinator.

### Enter Org Response

Entering a response for the organization conducting the review is required prior to submitting for manager(s) approval. Complete the following steps to enter an organizational response:

- (1) On the Manage Reviews page, click the “Enter Org Response” button.



The screenshot shows a web browser window with the following content:

- Browser title: WebCM - Microsoft Internet Explorer provided by PROMERGEN
- Buttons: Done, Attach, Cancel
- Form title: Organizational Response ATO-P: IPT-ORG1
- Disposition: Concur w/o Comment (dropdown menu)
- Comments: (text area)
- Requires Resolution:  (unselected)
- Does Not Require Resolution:  (selected)

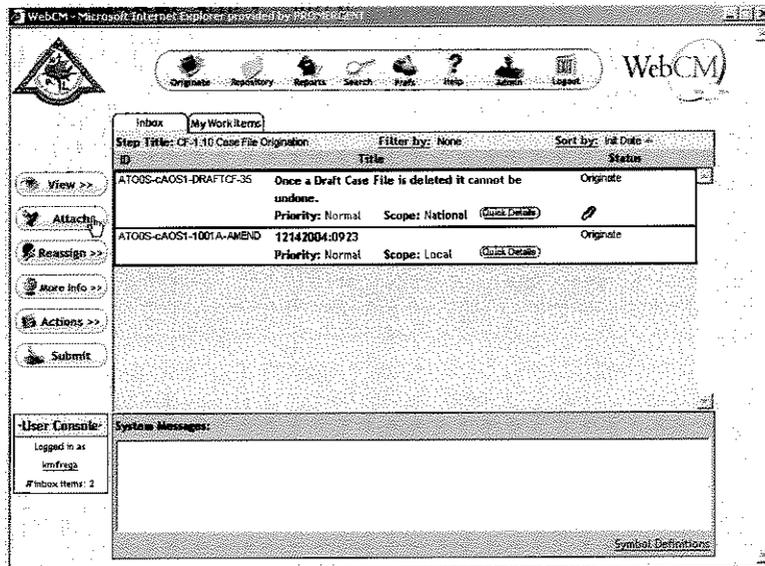
- (2) On the Organizational Response page, select a Disposition.  
 (3) Enter Comments as applicable. If the Disposition is:  
 a. “Concur w/o Comment”, Comments are not required  
 b. “Concur w/ Comment”, Comments are required  
 c. “Non-Concur w/ Comment”, Comments are required  
 (4) Select whether or not the comments need resolution.  
 (5) Attach one or more files to the work item via the “Attach” button.  
 (6) Click the “Done” button to save changes and return to the Manage Reviews page.

Review comments submitted by an organization will be viewed by the manager(s) for approval or disapproval before the work item is further processed.

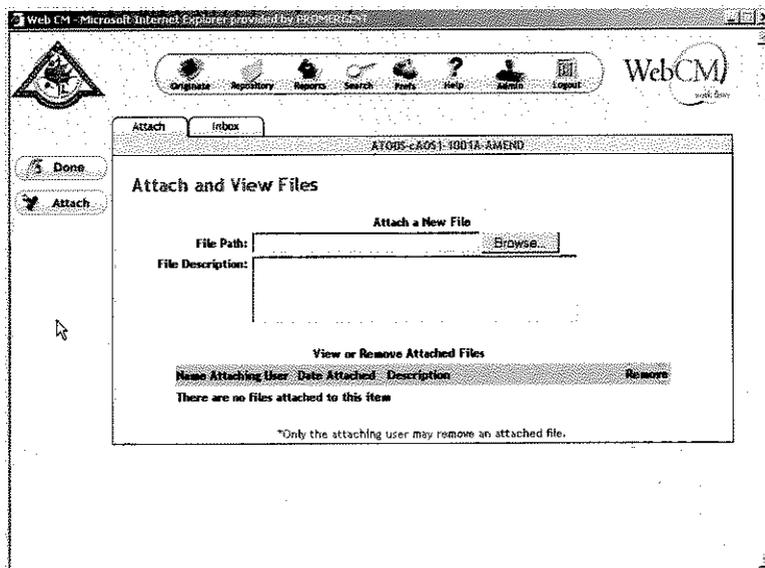
You have the ability to attach any number of files to any work item as well as view any existing attachments.

Complete steps (1) through (9) to attach and view files from the Inbox.  
 Complete steps (10) through (15) to view files from the read-only Case File/NCP/CCD view.

- (1) From your Inbox, select the work item.
- (2) Click the "Attach" button.



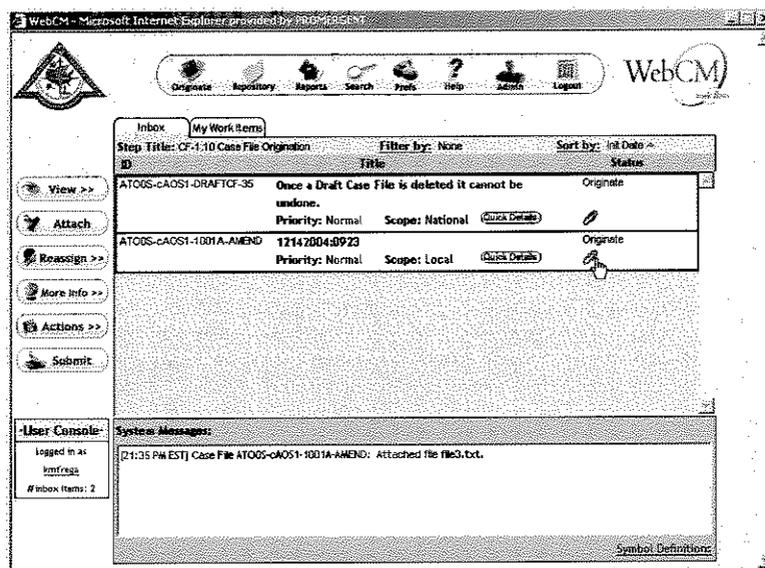
You will be presented with the Attach and View Files page where you can view all existing files and attach additional files.



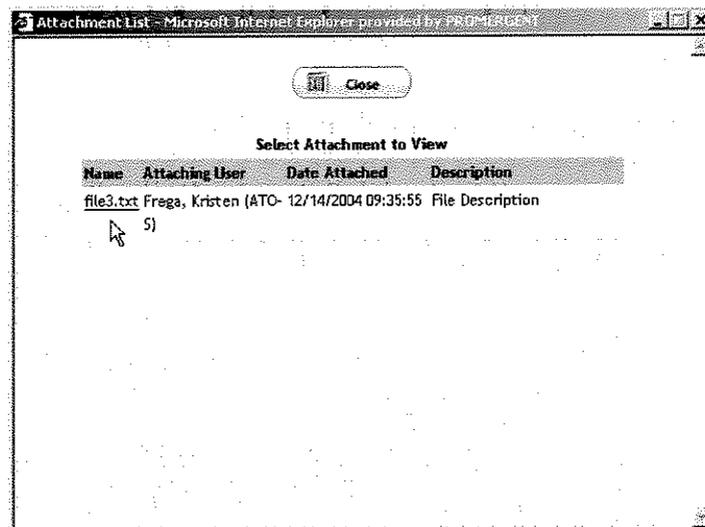
- (3) Click the "Browse" button to locate the file.
- (4) Enter a File Description.
- (5) Click the "Attach" button to attach the file to the work item and remain on the page to attach additional files.
- (6) Click the "Done" button to attach the file to the work item, save changes, and return to your Inbox.

When returned to your Inbox, notice the "View Attachments" symbol displaying on the work item. This symbol will only appear if there are existing attachments on the work item.

- (7) From the Inbox, to view existing attachments, click the "View Attachments" symbol.



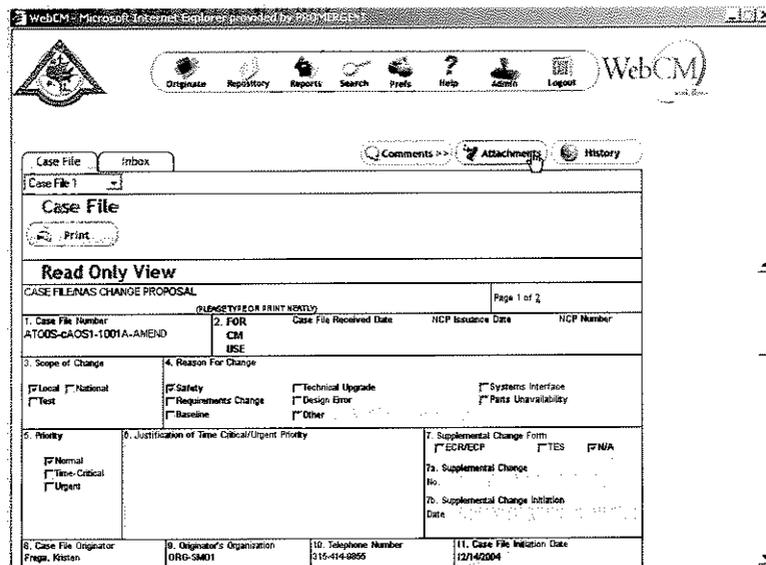
Note that you may also click the "Attach" button at any time to view all existing attachments.



- (8) Click the file name to view the attachment(s).
- (9) Click the "Close" button to return to the Inbox.

To view attachments from the read-only Case File/NCP/CCD view, complete the following steps:

- (10) From the Inbox, select the Case File/NCP/CCD.
- (11) Click the "View" button.
- (12) Select the "Selected Item" option. The read-only view of the Case File/NCP/CCD forms will display.
- (13) From the Read-Only View, click the "Attachments" button.



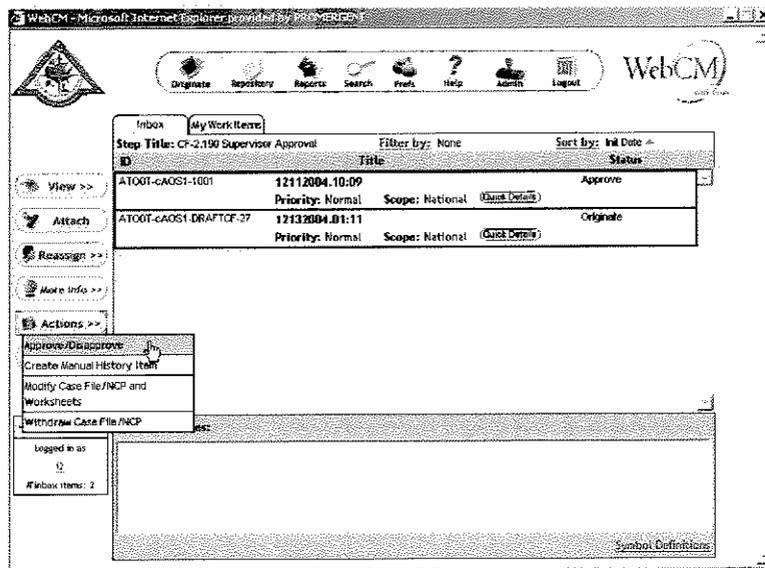
CASE FILE AS CHANGE PROPOSAL			
(PLEASE TYPE OR PRINT NEATLY)			
1. Case File Number ATOOS-CAOSI-1001A-AMEND	2. FOR CM	Case File Received Date	NCP Issuance Date
3. Scope of Change <input type="checkbox"/> Local <input type="checkbox"/> National <input type="checkbox"/> Test		4. Reason For Change <input type="checkbox"/> Safety <input type="checkbox"/> Requirements Change <input type="checkbox"/> Baseline <input type="checkbox"/> Technical Upgrade <input type="checkbox"/> Design Error <input type="checkbox"/> Other	
5. Priority <input type="checkbox"/> Normal <input type="checkbox"/> Time-Critical <input type="checkbox"/> Urgent	6. Justification of Time Critical/Urgent Priority		7. Supplemental Change Form <input type="checkbox"/> ECR/ECPP <input type="checkbox"/> YES <input type="checkbox"/> N/A
8. Case File Originator Prega, Kistan	9. Originator's Organization ORG-SMD1	10. Telephone Number 315-414-8855	11. Case File Initiation Date 12/14/2004

The list of attachments will open in a pop-up window for your viewing.

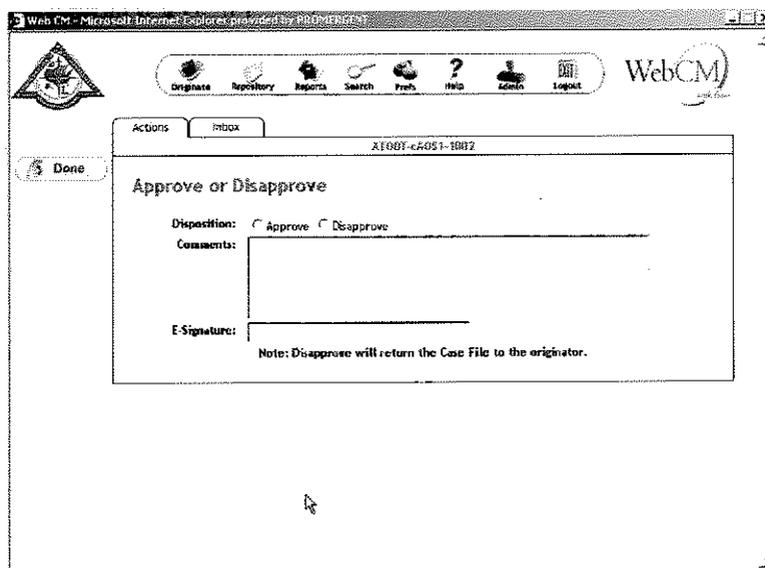
- (14) Click the file name to view the attachment.
- (15) Click the "Close" button to return to the Read Only View of the Case File/NCP/CCD forms.

To approve a work item for further processing or to disapprove a work item and either return it to a previous step in the workflow or close it, you must complete the "Approve/Disapprove" action. To so, complete the following steps:

- (1) From your Inbox, select the work item.
- (2) Click the "Actions" button.
- (3) Select the "Approve/Disapprove" option.



On the Approve or Disapprove page, you are required to select a Disposition. If you are disapproving the work item, Comments are required. Comments are optional for approval. You are also required to enter your E-Signature.



- (4) Select a "Disposition".
- (5) Enter "Comments" if applicable.
- (6) Enter your "E-Signature".
- (7) Click the "Done" button to save changes and return to your Inbox.
- (8) From the Inbox, click the "Submit" button to forward the work item for further processing.

## **More Info**

### **Topics:**

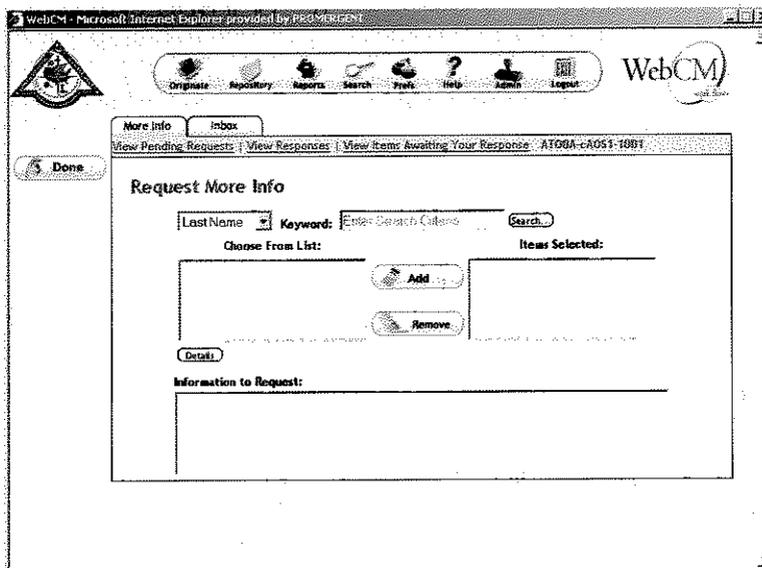
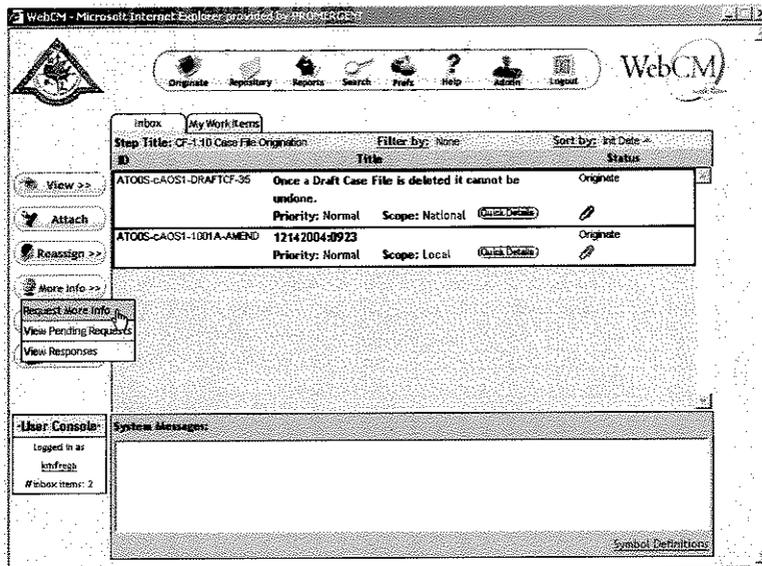
- *How to use More Info – puts item on “hold”, must mark response as “Read”*
- *Use for draft review*
- *Use to send informational review comments to originator*
- *Use when multiple comments elevated for ROC*

### **Documents:**

- *Request More Info*
- *Respond to a More Info Request*
- *View a More Info Request Response*

You have the ability to direct a request for more information regarding a particular work item to one or more users. To do so, complete the following steps:

- (1) From your Inbox, select the work item.
- (2) Click the "More Info" button.
- (3) Select the "Request More Info" option.

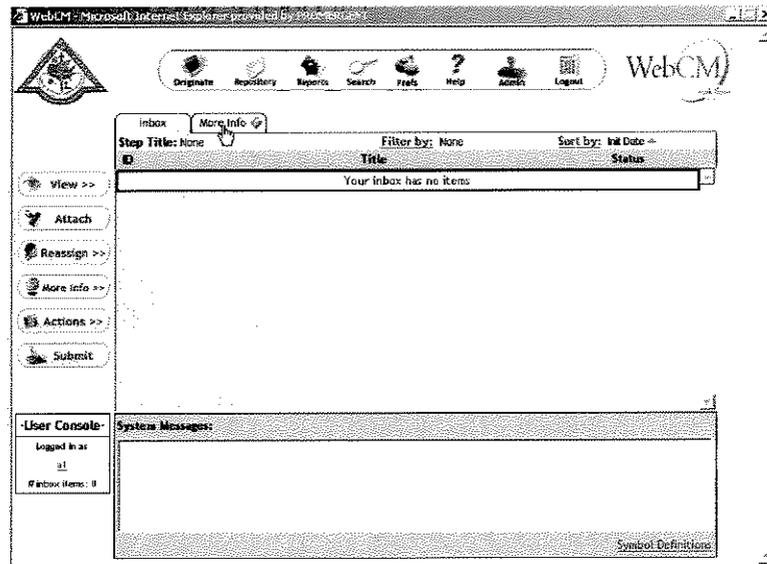


- (4) On the Request More Info page, select at least one user in which you need additional information.
- (5) Enter the Information to Request.

- 
- (6) Click the "Done" button to save changes and process the request. Each selected user will receive an e-mail to notify him or her of the request. You will be presented with the list of all pending requests you have for the selected work item.
  - (7) Click the "Inbox" tab to return to your Inbox.

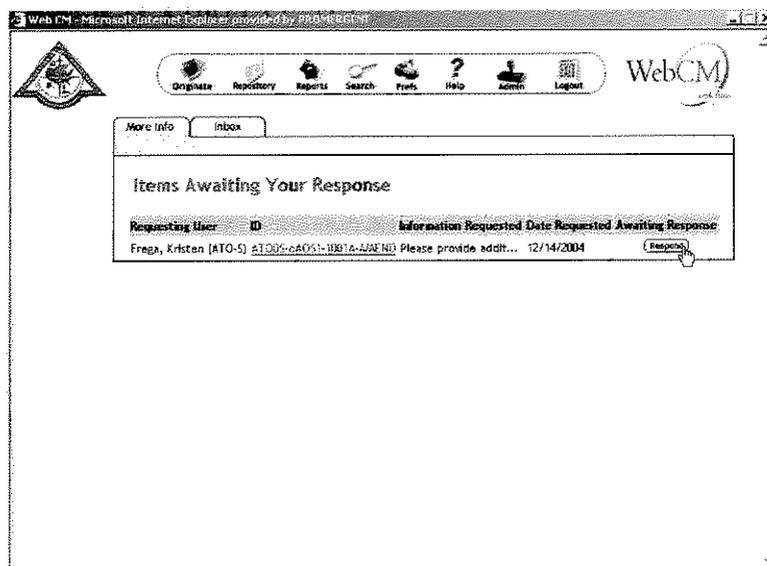
When a user requests additional information from you regarding a particular work item you will receive an e-mail to notify you of the request. Additionally, in your Inbox, there will be a "More Info" tab to indicate the request. Complete the following steps to provide your response to the more information request from another user:

- (1) From your Inbox, click the "More Info" tab.

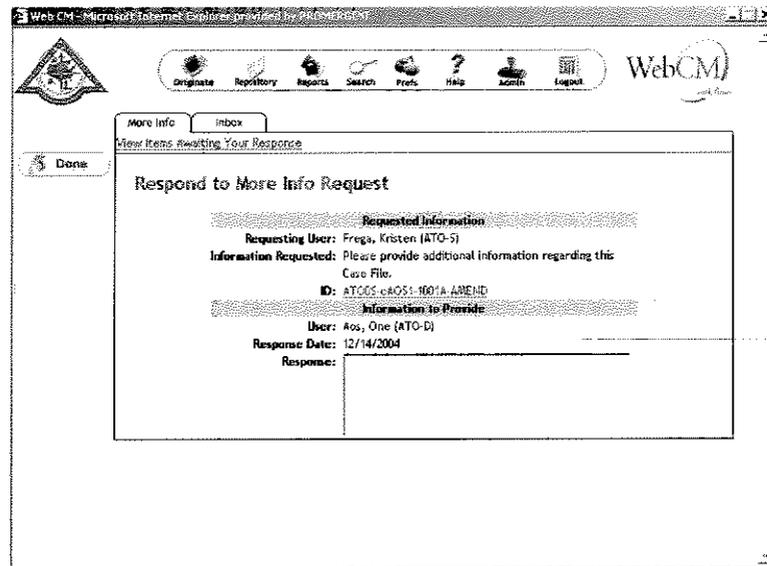


The Items Awaiting Your Response page lists all requests made to you. If needed, you may click the ID link to view the work item to which the request applies.

- (2) Click the "Respond" button.



The Respond to More Info Request page displays the details of the request including the information needed and the requesting user. If you need to return to the Items Awaiting Your Response page, click the "View Items Awaiting Your Response" link.



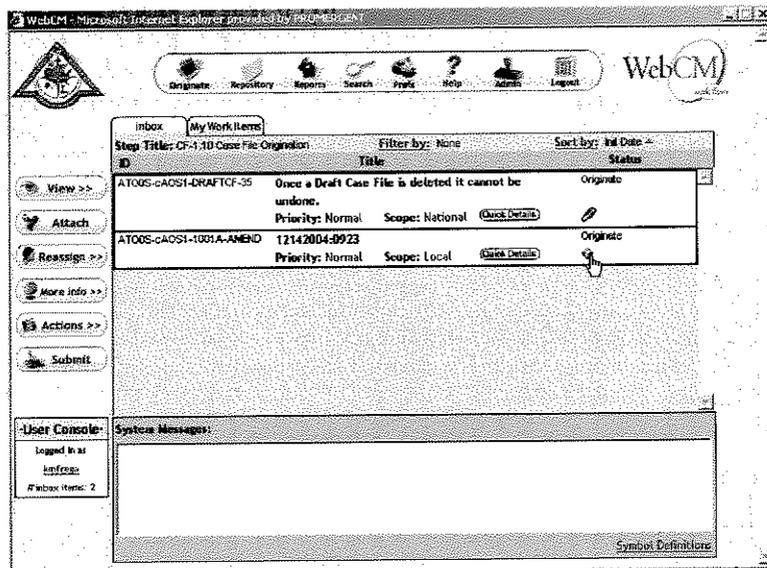
To provide more information:

- (3) Enter a detailed Response.
- (4) Click the "Done" button to save changes.  
If you had only one request, clicking the "Done" button will return you to your Inbox.  
If you have additional requests, clicking the "Done" button will return you to the Items Awaiting Your Response page.

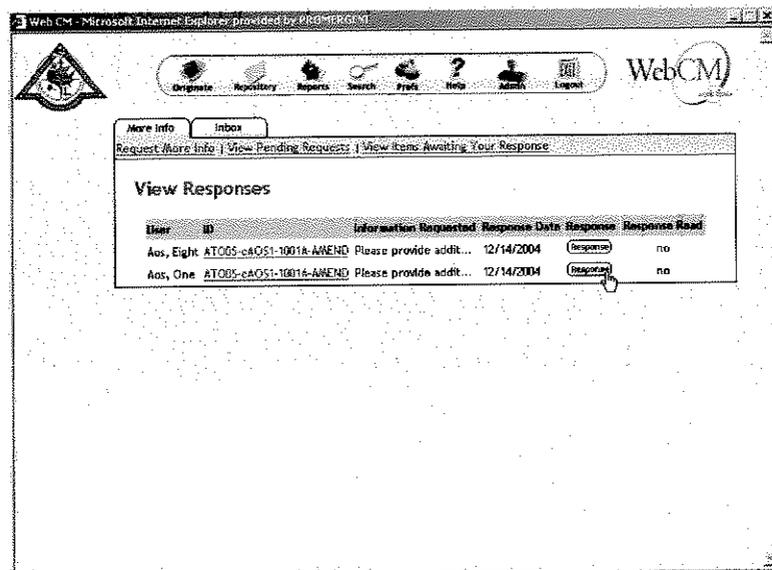
After responding, the request will no longer display and the system will send an e-mail to the requesting user to notify him/her of the response.

Once you have received a response to your request for more information, you will receive an e-mail to notify you of the response. Additionally, the work item will be marked with the "View Response to More Info Request" symbol. Complete the following steps to view the response to your request for more information:

- (1) From your Inbox, click the "View Response to More Info Request" symbol.

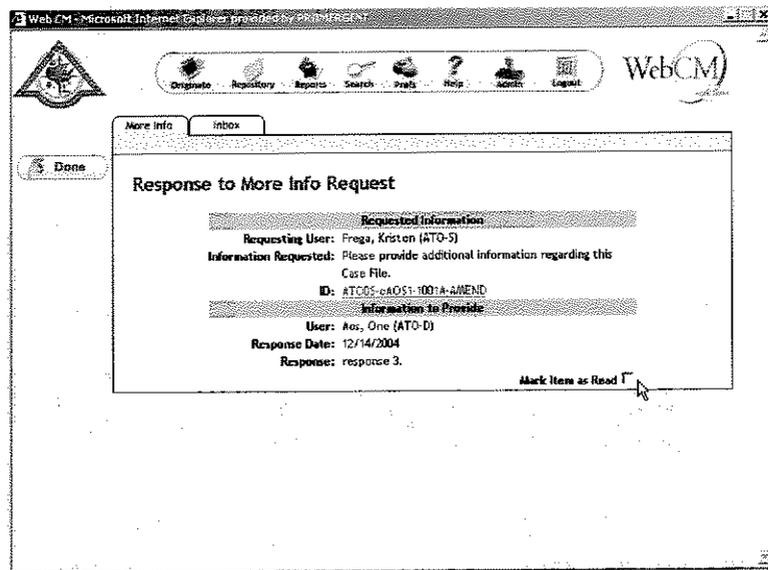


The View Responses page lists all responses that you have received regarding your request.



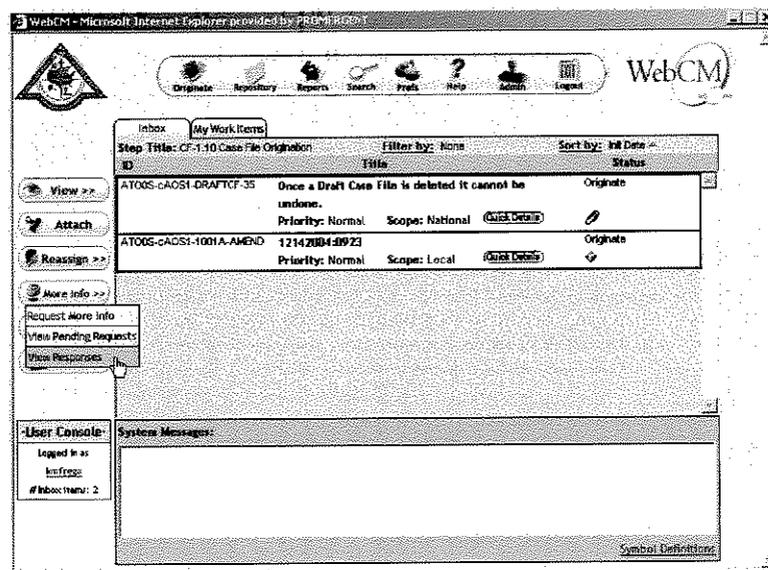
- (2) Click the "Response" button for the desired user.

The Response to More Info Request page displays the details of the response provided.



- (3) To acknowledge the response and then be allowed to submit the work item for further processing, you must select the “Mark Item as Read” checkbox and then click the “Done” button to save changes. To leave the response unread, just click the “Done” button to return to the View Responses page.

Also note, that from your Inbox, you may also view the response by selecting the work item, clicking the “More Info” button and selecting the “View Responses” option.



# User Maintenance

## Topics:

- ***Personnel controls***
  - *New accounts*
  - *Reactivating accounts*
  - *Retiring accounts*
  - *Security privilege modification*
- ***WebCM User Access Form – box 1***
- ***Roles by User report***

## Documents:

- ***Web Configuration Management (WEBCM) Rules of Behavior***
- ***WebCM User Access Form***
- ***Reports***

**APPENDIX A**



**Federal Aviation  
Administration**

**Web Configuration Management  
(WEBCM)**

**Rules of Behavior**

**May 31, 2007**

## **Rules of behavior are rules by which all FAA Personnel must abide when accessing WebCM**

They clearly delineate the responsibility and behavior expected of all individuals accessing the system. The rules also state consequences of behavior inconsistent with the rules, or actual non-compliance. Adherence to the guidelines protects the user and the FAA from Viruses, and Unauthorized personnel attempting to infiltrate the FAA's network system. Failure to comply with these Rules of Behavior could result in disciplinary action against the non-compliant user and have adverse consequences to the FAA as a whole.

## **Policies and Procedures**

The rules are not to be used in place of existing policy, rather they are intended to enhance and further define the specific rules each user must follow when accessing WebCM. The rules are consistent with the policy and procedures described in the Following directives:

- Public Law 100-235, "Computer Security Act of 1987"
- Office of Management and Budget (OMB) Circular A-130, "Management of Federal Information Resources," Appendix III, "Security of Federal Automated Information Resources" updated in 1996
- FAA Order 1600.1D, "Personnel Security Program"
- FAA Order 1600.6, "Physical Security Management Program"
- FAA Order 1600.66, "Telecommunications and Information Systems Security Policy"
- FAA Order 1370.82, "Information systems Security Program"
- FAA Order 1370.92, "Password and Pin Management"
- FAA Order 1370.81A, "Electronic Mail"
- FAA Order 1370.79A, "Internet Use Policy"

## **Comply With Your Access Privileges**

Access to WebCM is given to you by the CM administrator and approved by ATO CM.

- Access to specific functions and data within WebCM is on a need-to-know basis.
- All those who are contractor support for the FAA requesting access to WebCM must
- Have an approved FAA 85P.
- Limiting user access only to data and system functions they need to do their job is
- Called least privilege access.
- Only the system and network administrators have global access to WebCM data,
- Functions, and to the raw data files.
- If your responsibilities change and you and your manager determine that the
- nature of your access to WebCM should change, you must notify the WebCM system
- administrator and ATO CM through the mechanism built for submitting requests for
- New accounts or updating existing accounts.
- Attempts to access any part of WebCM to which you have not been granted access,
- Could cause result in loss your WebCM access entirely.

## **Follow Approved Password Procedures**

Access to WebCM is password protected.

- Your password must be:
  - at least eight characters long
  - a combination of alphanumeric and special characters, including @#\$\$%\*!.
- You must change your password at least every 180 days.
- You cannot use the same or a recently used password when you change your password within the last five change cycles.
- When choosing a password:
- avoid using your name, birth date, social security number, or any string of characters that could be associated with you personally (e.g., a hobby).
- You should also avoid words commonly found in the dictionary.
- Special characters should not be used in an obvious fashion, e.g., “thru&thru”. Ideally, your password should appear as a random string of characters.

## **Do Not Disclose Your Password To Anyone!**

- Regardless of reason, do not share your password with anyone.
- Sharing your password with another person allows that person to utilize WebCM using your User Name.
- You are responsible and held accountable for all transactions associated with your User Name.
- If you believe your password has been compromised, inform the WebCM Help Desk or ATO CM and change your password immediately.

## **Memorize Your Password**

- Do not write your password or User Name on anything (i.e. a Rolodex); they can be easily found and used.
- Any documentation containing your initial logon password should be shredded and discarded.
- Don't assume that you have a “secret” place to keep written passwords; it's not.
- If you forget your password, either use the "Forgot Password?" functionality from the WebCM Communications Portal or call the WebCM Help Desk.
- If your password is compromised, tell your CM administrator immediately and change your password. Tell the administrator the circumstances under which the password was compromised. This will help you and the administrator prevent the compromise from happening again and may prevent damage to WebCM.

## **Never Leave WebCM Active On An Unattended Workstation**

- When you leave your workstation, no matter how briefly, logoff the system or lock it.
- This prevents unauthorized access both to WebCM and any data on your machine.
- Logging off will also clear memory in your workstation, and drop connections to the WebCM LAN that could be compromised.
- Consider installing a screen saver with password access
- set to no more than five minutes.

## **Participate In Required Security Training**

- These rules of behavior serve as the initial orientation about information systems security and the LAN. The Office of Information Security (AIS) sponsors the Security Awareness Virtual Initiative (SAVI), a web-based tool that resides on the FAA Intranet. Users can download and complete the awareness activities on their workstations or via an Internet browser. All federal employees and contractors on an annual basis must complete this training.
- Such courses will keep you up to date about new threats to FAA data, or changes to FAA systems such as WebCM that have been implemented to protect FAA data and networks, and about which you should be familiar to properly do your job.
- Failure to attend refresher training may cause you to lose access to WebCM.

## **Behave In A Manner That Justifies Trust And Confidence**

- Although WebCM does not contain classified data, you must still exercise the proper precautions with this information to ensure the continual safe and efficient operations of the NAS.
- Casually downloading information from the internet to your computer is strongly cautioned against. This kind of activity could:
  - Cause your workstation configuration to become unstable; and
  - Introduce viruses, Trojans, and other hacker tools.
- Behavior that compromises NAS data integrity, security, or availability will result in the loss of access to WebCM.

## **Understand our Individual Security Responsibilities**

- You should be familiar with, and practice, these rules of behavior.
- You should know who to report actual or suspected violations to, and what constitutes suspicious activity.
- You should also know how to keep up to date with FAA security directives and WebCM security implementations.

## **Do Not Connect Any Unauthorized Piece Of Hardware To The Workstation Used To Access WebCM**

- Doing so may enable unauthorized access to WebCM (e.g., through a modem).
- Scan all disks or CDs with Anti-virus software before inserting into your Workstation
- Disks or CDs from unidentified sources may be infected with a virus that could be transmitted to the FAA Network. If you do not have Anti-virus software on your machine, contact your LAN administrator.

## **Protect WebCM Data**

- You are responsible for any WebCM data you print, transmit, or record.
- Do not leave printed WebCM data available for pickup. Print it and retrieve it quickly, or at least make sure it is printed in an access-controlled room and is protected from unauthorized disclosure.
- Information left unattended in your office should be locked in a desk drawer, or your office that is kept locked.
- If the report is being delivered or sent to another person, make sure it is wrapped in such a way that information will not be lost or disclosed.
- Other forms of data transmission (e.g., tapes and removable drives) must also be safeguarded. Mark any such removable devices as “For Office Use Only.”
- Do not leave it out where it could be stolen

## **Do Not Provide WebCM Data To Unidentified People Over The Phone**

- People may try to gain unauthorized access to the WebCM system or data by posing as security officials or FAA employees. They may even pretend to know you by mentioning your name.
- Remember, though—your name is easy to find through phone books, from passersby, or from stolen e-mail lists. Just because somebody calls you by name over the phone does not mean they really DO know you and should be given access to WebCM data.
- Don’t be intimidated by somebody you do not recognize, or threatened by some form of punishment because “I’m too busy and I want it now!”
- Ask a caller you do not recognize for their full name, position, office, and phone number, and tell them that you will get back to them shortly. Then verify their identify and access authorization.
- Do not discuss WebCM data or the WebCM security rules with anyone but authorized WebCM users

## **Report Incidents**

- As a trusted user of WebCM it is your responsibility to report anything unusual
- to the WebCM Administrator through the WebCM Help Desk at
  - 1-866-66WEBBCM.
- When you believe there has been an attempt to break into WebCM or any suspicious activity like unauthorized access to WebCM, please report the incident to the WebCM Administrator through the WebCM Help Desk at
  - 1-866-66WEBBCM.
- Make note of when and where the possible incident occurred. And keep note of the location, and be prepared to describe how you detected the incident.
- Computer Security Incident Response (CSIRC) contact info: 1-866-580-1852 or e-mail [9-AWA-CSIRC@faa.gov](mailto:9-AWA-CSIRC@faa.gov)
- FAA IT Service Center contact info: 1-202-385-8020 or e-mail [9-AWA-ATO-IT-HelpDesk@faa.gov](mailto:9-AWA-ATO-IT-HelpDesk@faa.gov)

## **WebCM Security Certification and Authorization Package (SCAP)**

### **Personnel Controls**

- For an FAA employee or contractor to participate in the NAS configuration management, the user will require access to the WebCM system. The required procedures for maintaining user accounts must comply with security requirements.
- The following describes the processes by which a user will obtain a WebCM account and the user account management process.

### **This process provides for the following WebCM user account options:**

- New Account
- Reactivate Account (inactive account)
- Retired Account
- Re-certification of Accounts Requiring CM Administration Privileges
- Security Privileges Modification

## **New Account:**

1. The preferred mechanism to obtain access to WebCM is for the user to complete an on-line request form available on the WebCM Communications Portal, <http://webcm.faa.gov>. Clicking "Request Access to WebCM" will provide the user with an electronic form to complete and submit into an electronic workflow process.
2. The appropriate FAA Management electronically approves and forwards the request form via the workflow to the appropriate CM Coordinator/Lead for that organization who will complete the user account setup and configuration.
3. Once the WebCM user account has been configured, the user will be notified via e-mail and provided with their temporary password.
4. If for any reason the electronic process cannot be utilized, the WebCM Help Desk should be contacted at 1-866-66WEBCEM.
5. If a user's organization does not exist in WebCM, then the user must request access using the WebCM User Access Form, which is available via the WebCM web page, <http://webcm.faa.gov>.
6. The user submits the form to FAA Management for approval and then forwards the approved form to the appropriate CM Administrator.
7. If the user does not have a CM Administrator, then the FAA Management request should be forwarded to the WebCM Help Desk at FAX # 315.414.9856 or <http://webcm.faa.gov>.
8. Upon creation of the account, an e-mail notification will be sent to the requesting user, applicable FAA Manager, and to ATO CM for auditing purposes.
9. The WebCM User Access Form will be archived to provide an audit trail for ATO CM.

## **Reactivate Account (inactive account)**

If a user's WebCM account has been previously deactivated and the user wishes to have the account reactivated, then the user must request reactivation using the WebCM User Access Form, which is available via the WebCM Communications Portal, <http://webcm.faa.gov>.

The user submits the form to FAA Management for approval and then forwards the approved form to the appropriate CM Administrator.

If the user does not have a CM Administrator, then the FAA Management request should be forwarded to the WebCM Help Desk at FAX # 315.414.9856 or <http://webcm.faa.gov>.

Upon reactivation of the account, an e-mail notification will be sent to the requesting user, applicable FAA Manager, and to ATO CM for auditing purposes.

The WebCM User Access Form will be archived to provide an audit trail for ATO CM.

## **Retire Account**

- When a user retires or no longer requires access to WebCM, FAA Management will initiate a change request, via the WebCM User Access Form, to the appropriate CM Administrator for that organization.
- Also, WebCM reports are run biannually and identify users who have not logged into WebCM in a year. The CM Administrator contacts the user and the user's supervisor via e-mail regarding status.
- If the user has retired or no longer requires access to WebCM, a CM Administrator will:
  - Verify that the user's inbox is empty;
  - If the WebCM inbox contains Case file/NCP/CCDs, investigate and reassign the work to the appropriate personnel; and
  - Submit a change request to the user's supervisor for account change approval.
- The CM Administrator will deactivate the user account. The CM Administrator will provide a copy of the completed change request to FAA Management and ATO CM for auditing purposes.
- In the absence of a CM Administrator, the FAA Management will forward the request form to the WebCM Help Desk. The WebCM Help Desk will deactivate the user account and will forward the completed change request to FAA Management and ATO CM for auditing purposes.
- The change request will be archived and provide a user account audit trail.

## **Re-certification of accounts requiring CM Administration privileges**

- ATO CM requires yearly account re-certification of users having WebCM CM Administrator privileges.
- ATO CM will notify FAA Management of each user and request recertification approval.
- FAA Management will reconfirm certification to ATO CM.
- Or, FAA Management will initiate either the security privilege modification or retire account process.

## **Security Privilege Modification**

- If a user's WebCM account requires changes to the security privileges, then the user
- must request modification using the WebCM User Access Form, which is available via the WebCM Communications Portal, <http://webcm.faa.gov>.
- Note that a user may not be assigned WebCM CM Administration security privileges without first attending an ATO CM approved training course.
- The user submits the form to FAA Management for approval and then forwards the approved form to the WebCM Help Desk at FAX # 315.414.9856 or <http://webcm.faa.gov>.
- Upon modification of the security privileges of the account, an e-mail notification will be sent to the requesting user, applicable FAA Manager, and to ATO CM for auditing purposes.
- The WebCM User Access Form will be archived to provide an audit trail for ATO CM.

## WebCM User Access Form

- To obtain access to WebCM, the users will complete a request form via the ATO-W WebCM web page (<http://acm.faa.gov/webcm/>) and forward to their FAA Management.
- FAA Management approves, signs, and forwards to the appropriate CM Administrator.
- The CM Administrator will activate the user account and e-mail, under separate cover, the user's login password and e-signature password to the user. The CM Administrator will then forward the completed action to ATO CM for auditing purposes and copy the requesting FAA Management.
- If the user does not have a CM Administrator or if they have not been through WebCM training, then the FAA Management request will be forwarded to the CM Automation Help Desk at FAX # 202-548-5501 or <http://acm.faa.gov/cmautomation>.
- The CM Automation Help Desk will contact ATO-W, Winfred Battle, for approval of user accounts.
- Upon creating an account, notification e-mail will be sent to the new user, the FAA Manager, and ATO CM for auditing purposes.
- The WebCM User Access Form will be archived and provide an audit trail for ATO CM.

1. Check One:  New  Reactivate  Retire  Re-certify  Modify

(See Instructions on Page 2)  FAA Applicant  Contractor Applicant  Current WebCM User Name \_\_\_\_\_

**Applicant Identification**

2. Name \_\_\_\_\_ 3. FAA Routing Symbol (e.g. AJW-27) \_\_\_\_\_

4. Org. Name \_\_\_\_\_ 5. Title \_\_\_\_\_

6. Telephone No. ( ) \_\_\_\_\_ (Ext.) \_\_\_\_\_ 7. E-mail \_\_\_\_\_

8. Mailing Address and Room No. \_\_\_\_\_

---

9. \_\_\_\_\_  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**Contract Information (Required if applicant is not an FAA employee)**

10. Contract Number \_\_\_\_\_ 11. Contract Name \_\_\_\_\_

12. Company \_\_\_\_\_ 13. Contract Expiration Date \_\_\_\_\_

**FAA Organization Manager's signature – Please sign on line number 16.**

**Access Request and Authorization**

14. **WebCM**

WebCM Admin.  Regional Admin.  IPT Admin.  AOS Admin.  CM Admin.  General User  Training

15. \_\_\_\_\_  
CM Administrator \_\_\_\_\_ Date \_\_\_\_\_

I certify and approve this applicant's request. In accordance with OMB Circular A-130, the Applicant has been instructed not to misuse government ADP resources, to protect the confidentiality of log-in/sign-on passwords, and to report compromises of such passwords. I agree to ensure effective implementation and application of the provisions outlined in OMB Circular A-130 and to immediately notify the FAA PM Systems Coordinator if the applicant's employment status changes or if the employee has no further need for the items requested above.

**Authorization To Expend Resources:**

16. Name \_\_\_\_\_ (Print) \_\_\_\_\_ (Signature) \_\_\_\_\_ Date \_\_\_\_\_

17. Routing Symbol \_\_\_\_\_ 18. Telephone No. Area Code ( ) \_\_\_\_\_

**To Be Completed by ATO-W CM Headquarters**

19. Winfred Battle \_\_\_\_\_  
FAA Coordinator \_\_\_\_\_ Date \_\_\_\_\_

## Instructions

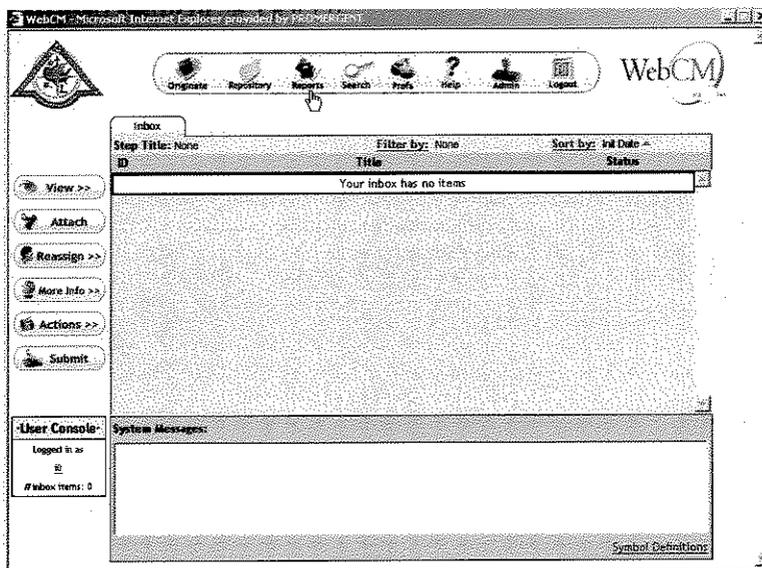
- |   |   |
|---|---|
| 1. New, Reactivate, Retire, Re-certify, Modify and Current WebCM User Name<br>FAA or Contractor Applicant | Check appropriate box New, Reactivate, Retire, Re-certify, and Modify. If request for Reactivate, Retire, Re-certify, or Modify, Enter Current WebCM User Name<br>Check appropriate box for FAA Applicant or Contractor Applicant |
| 2. Name   | Applicant's printed name  |
| 3. FAA Routing Symbol   | Applicant's FAA routing symbol (contractors must supply organization they are supporting)   |
| 4. Org. Name  | Applicant's organization name   |
| 5. Title  | Applicant's job title   |
| 6. Telephone No.  | Applicant's area code and phone number  |
| 7. E-mail   | Applicant's work e-mail address   |
| 8. Mailing Address/Room No.   | Applicant's mailing address including room number   |
| 9. Signature and Date   | Applicant's signature and date signed   |
| 10. Contract Number   | FAA contract no. (not required if applicant is FAA)   |
| 11. Contract Name   | FAA contract name or acronym (not required if applicant is FAA)   |
| 12. Company   | Name of company (not required if applicant is FAA)  |
| 13. Contract Expiration Date  | Date current contract expires (not required if applicant is FAA)  |
| 14. WebCM   | Enter required level of access for applicant (AOS Admin, General User, etc.)<br>Check corresponding box if Training required  |
| 15. CM Administrator  | A signature of authorization and date is required from the CM Administrator upon completion of user setup.  |
| 16. Name  | Printed name and signature of FAA Manager and date signed   |
| 17. Routing Symbol  | Routing Symbol of FAA Manager   |
| 18. Telephone No.   | Telephone area code and number of FAA Manager   |

## To Be Completed by ATO-W CM Headquarters

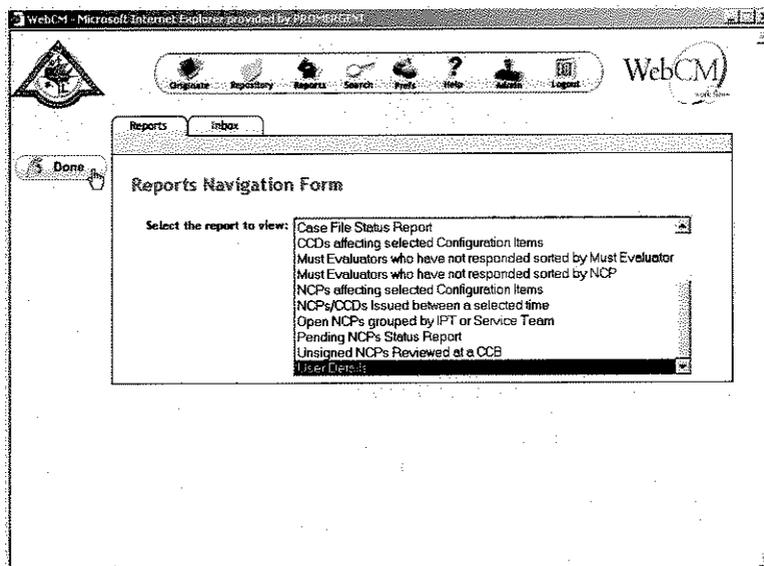
- |                                 |   |
|---------------------------------|---|
| 19. FAA ATO-W CM Representative | FAA ATO-W CM Representative and date received |
|---------------------------------|---|

There are a number of pre-configured reports that are ready for you to run at your convenience. To generate a report, complete the following steps:

- (1) From the Navigation Bar, click the "Reports" button.



The Reports Navigation Form contains all reports available to you.



- (2) Select a report.
- (3) Click the "Done" button.

# Help Desk Ticket

## Topics:

- *When do I create a help desk ticket?*
- *How do I create an enhancement request?*
- *What happened to problem reports?*
- *Tracking help desk tickets and problem reports*

## Documents:

# Creating a Help Desk Ticket

## 1. Select *Create a Help Desk Ticket* from the WebCM home page

The screenshot shows the WebCM Portal home page. The browser window title is "WebCM Portal - Microsoft Internet Explorer". The address bar contains "http://webcm.faa.gov/webCMPortal/index.jsp". The page layout includes a header with the FAA logo and "WebCM work flows" branding. A central "Welcome to WebCM" section features a "Create a Help Desk Ticket" link highlighted with a red arrow. To the left, there are sections for "Using WebCM", "Support Central", and "User Forums". To the right, there are sections for "WebCM Login", "WebCM System Status", and "Virtual Learning Center". The "WebCM Login" section shows a "User Name" field with "ddunlap" and a "Password" field. The "WebCM System Status" section shows "Online - Operating Normally". The "Virtual Learning Center" section lists various resources like "Multimedia Demos", "Self-Study Presentations", "Step-by-Step Instructions", "Quick Reference Guides", "Workflow Diagrams", and "On-line Training".

## 2. User Authentication

- 2.1. Enter WebCM user name and password.
- 2.2. Press *Submit*.

https://webcm.amc.faa.gov - R...

**Authentication Required**

In order to process your request we need to validate that you are a valid WebCM user.

Please enter your WebCM User Name and Password below.

WebCM User Name:

Password:

D Internet

### 3. Complete Help Desk Ticket Form

- 3.1. **E-mail Address:** Automatically populated. Note, you cannot submit a help desk ticket with multiple e-mail addresses.
- 3.2. **Subject:** Brief description of issue (required).
- 3.3. **Message/Problem Description:** Describe in detail the problem you are having or the enhancement that you are recommending for WebCM (required).
- 3.4. **Work Item ID:** The case file, NCP, or CCD number of the work item that you are having a problem with in WebCM (optional).
- 3.5. **User's Inbox (username):** The WebCM user name that is having the problem (required). Recommend using "N/A" for enhancement requests.
- 3.6. **Repeatable?:** Select Yes if you can identify the steps to reproduce the problem in WebCM (optional).
- 3.7. **Steps to Repeat:** If Yes selected for Repeatable, enter the steps taken to reproduce the problem.

Please provide as much detail as possible when describing the problem that you are encountering. This will facilitate the investigation of the issue and any actions that may be required.

**WebCM Version:** 3.5-b19-20061120  
**Date:** 9/7/2007  
**Name:** Denise Dunlap  
**Organization:** ATO-W: Enterprise Configuration Mgmt  
**Phone Number:** 202-548-5524  
**E-mail Address:** denise.dunlap@baesystems.com  
**Subject:** Example Help Desk Ticket

**Message/Problem Description:** Describe in detail the problem or enhancement request.

**Work Item ID:** [NCP or case file number]  
**User's Inbox (username):** ddunlap  
**Repeatable?** Yes  No   
**Steps to Repeat:**

**Process Step Problem Occurred At:** -None Selected-  
**Problem Area:**

- 3.8. **Process Step Problem Occurred At:** Select the workflow step where the problem occurred or for the enhancement request (optional if Problem Area used).
- 3.9. **Problem Area (if not at a specific Process Step):** Enter general category of problem if not applicable to a specific workflow step (optional if Process Step selected).
- 3.10. **Suggested Priority:** Select the recommended priority:
  - 3.10.1. 1 – High: Critical, No Work-around Available
  - 3.10.2. 2 – Medium: Work-around Available, Intermittent
  - 3.10.3. 3 – Low: Minor, Work-around Available with Little or No Impact (default)
  - 3.10.4. 4 – Feature Request, Enhancement
- 3.11. **File Path:** Use the *Browse* button to attach additional documentation, if desired (optional). Can only attach one document.
- 3.12. **File Description:** Enter description of attached document (only required if document attached).
- 3.13. Press *Done* when all required fields are completed to submit the help desk ticket to Promergent. You will receive an automated e-mail confirmation in approximately 10 minutes. If you do not receive the automated e-mail, contact Promergent at 866-66-WEBBCM to verify that the help desk ticket was received.

https://webcm.amc.faa.gov - E-mail WebCM Help Desk - Microsoft Internet Explorer

**Work Item ID:** [NCP or case file number]

**User's Inbox (username):** ddunlap

**Repeatable?** Yes  No

**Steps to Repeat:**

**Process Step Problem Occurred At:** CF-2.200: HQ CMD Review

**Problem Area:** (if not at a specific Process Step)

**Suggested Priority:** 3 - Low: Minor; Work-around Available with Little or No Impact

- 1 - High: Critical, No Work-around Available
- 2 - Medium: Work-around Available, Intermittent
- 3 - Low: Minor; Work-around Available with Little or No Impact
- 4 - Feature Request, Enhancement

**File Path:** Browse...

**File Description:**

\* Use this form to attach a file to your Help Desk Ticket. Please put multiple files into a zip file attachment.

Done Cancel

Done Internet

# Workflow Diagrams

## Topics:

- *Five primary workflows*
- *Workflow legend*
- *Decoding workflow step numbers*
  - *Workflow step prefix numbers*
  - *Review workflow suffix numbers*

## Documents:

- *WebCM Workflow Diagrams*
- *WebCM Case File/NCP/CCD Workflow*

## Workflow Legend

The “Workflow Legend” of the WebCM Case File/NCP/CCD Workflow Charts provides the textual definition of the basic flowchart shapes illustrating the path of a Case File/NCP/CCD undergoing processing via the WebCM application.



### User Decision

This symbol represents a decision or switching type of function made manually by the WebCM user.



### Automated Decision

This symbol represents a decision or switching type of function made only by the WebCM system.



### Process

This symbol represents any kind of processing function encompassing a series of workflow steps.



### Individual Step

This symbol represents a specific workflow step.



### Outgoing Off-Page Reference

This symbol indicates a cross-reference to another page of the flow chart.



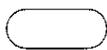
### Incoming Off-Page Reference

This symbol indicates a cross-reference from another page of the flow chart.



### On-Page Reference

This symbol indicates a cross-reference within the same page of the flow chart.



### Terminator

This symbol indicates the end of the workflow.

## A. Regional Workflow

Chart “A. Regional Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which a Case File/NCP/CCD of regional origin follows.

The regional path begins with the process of Case File Origination (1.0).

### A.1 - Regional Organization Supervisor Approval

Immediately following the process of origination, the user must forward the Case File to the supervisor of the organization of which the Case File is originated against. This organization is indicated in block 1, Case File Number, on page one of FAA form 1800-2. Meaning, submittal from the Case File origination workflow step to workflow step A.1 sends the Case File to the organization supervisor of the organization selected in block 1 of FAA form 1800-2.

- D-A.1a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-A.1b - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the regional path for further processing.
- D-A.1c - SRM Process: Upon approval at decision step D-A.1b, the system automatically detects if the organization originated against is configured to participate in the SRM process.
  - If the organization is not, the item forwards to workflow step A.2 only.
  - If the organization is, the item forwards to both workflow step A.2 and for Safety Review (20.0).

### A.2 - Facility/SMO Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-A.2a - Facility/SMO Review: The key purpose of this workflow step is for the user to decide to send the item for Facility/SMO Review (2.0) or for Regional Review (4.0).
  - Sending the item for Facility/SMO Review allows the item to undergo a Regional Review immediately afterwards.
  - Sending the item directly for Regional Review skips the Facility/SMO Review, however, the CM Coordinator who initially receives the item for Regional Review can override this decision; thus, send it back for Facility/SMO Review.

### D-A.1d - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for A.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-A.2d.

### D-A.2b - Distributed Review

The routing options available depend on the feedback received during the Regional Review.

- If the regional review coordinator distributed for review and received a response from one or more reviewers, the only routing option following completion of the Regional Review is to determine if the Case File needs to undergo the Inter-Regional Review.

- If the regional review coordinator distributed for review but did not receive a response from at least one reviewer, the system determines the path based on the safety risk level as illustrated in decision step D-A.2c.

#### D-A.2c - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for A.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-A.2d.

#### D-A.2d - Regional CI Only

The system presents routing options based on CI association.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### A.3 - Inter-Regional Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-A.3a - Safety Risk
  - The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for A.4 - Waiver to Installation Siting Criteria.
  - If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-A.3b.
- D-A.3b - Regional CI Only
  - If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to National Control Desk Evaluation Path or for Inter-Regional Review (6.0).
  - If the CI originated against is not regional only, the system presents the user with the following four routing options: Inter-Regional Review (6.0), Prescreen Review (8.0), A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### D-A.3c - Regional CI Only

Upon completion of the Inter-Regional Review, the system presents routing options based on CI ownership.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### A.4 - Waiver to Installation/Siting Criteria

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for

selection. There are no required actions at this workflow step. The only available routing option is to send the Case File along the National Control Desk Evaluation Path.

**A. Regional Control Desk Evaluation Path**

Continuing the Case File along the regional path sends the Case File/NCP/CCD from Regional Control Desk Evaluation (10.1) through the process of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

**A. National Control Desk Evaluation Path**

The National Control Desk Evaluation path begins with the process of National Control Desk Evaluation (10.0).

- If the final disposition of the Prescreen Review is “New Requirement”, upon entering the process of National Control Desk Evaluation process, the user has the option to challenge closure of the Case File. Challenging closure of a new requirement returns the Case File for Prescreen Review.

The only routing option upon completion and approval during National Control Desk Evaluation is for Must Evaluation Review (11.0).

- Upon initially entering the NCP into Must Evaluation Review, the user has the option of returning the NCP for National Control Desk Evaluation.

Immediately following Must Evaluation Review, the NCP is forwarded through the processes of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

## B. HQ/IPT Workflow

Chart “B. HQ/IPT Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which a Case File/NCP/CCD of HQ/IPT origin follows.

The HQ/IPT path begins with the process of Case File Origination (1.0).

### B.1 - HQ/IPT Organization Supervisor Approval

Immediately following the process of origination, the user must forward the Case File to the supervisor of the organization of which the Case File is originated against. This organization is indicated in block 1, Case File Number, on page one of FAA form 1800-2. Meaning, submittal from the Case File origination workflow step to workflow step B.1 sends the Case File to the organization supervisor of the organization selected in block 1 of FAA form 1800-2.

- D-B.1a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-B.1b - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the HQ/IPT path for further processing.
- D-B.1c - SRM Process: Upon approval at decision step D-B.1b, the system automatically detects if the organization originated against is configured to participate in the SRM process.
  - If the organization is not, the item forwards to workflow step B.2 only.
  - If the organization is, the item forwards to both workflow step B.2 and for Safety Review (20.0).

### B.2 - HQ CMO Review

Upon submittal to this workflow step, the user must choose one CM Lead at the IPT level to receive the item. All active CM Leads of the IPT associated to the organization originated against are available for selection.

- D-B.2a - Send for Rework
  - Sending the item for rework will return the item to the originator at workflow step B.3 - Rework Case File.
  - If the user does not choose to send the item for rework, they must withdraw, disapprove, or approve the item.
- D-B.2b - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-B.2c - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the HQ/IPT path for further processing.
- D-B.2d - Prescreen Review
  - If the item is sent for Prescreen Review, the item forwards to process of the Prescreen Review (8.0).

### B.3 - Rework Case File

Upon receiving the work item for rework, the user has the option to provide rework comments or withdraw the item.

- D-B.3a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.

- If the user does not choose to withdraw the Case File, they must enter rework comments and return the item to the IPT CM Lead at workflow step B.2 - HQ CMO Review.

#### **National Control Desk Evaluation Path**

Continuing the Case File along the national path sends the Case File/NCP/CCD from Prescreen Review (8.0) through to the process of National Control Desk Evaluation (10.0).

- If the final disposition of the Prescreen Review is “New Requirement”, upon entering the process of National Control Desk Evaluation process, the user has the option to challenge closure of the Case File. Challenging closure of a new requirement returns the Case File for Prescreen Review.

The only routing option upon completion and approval during National Control Desk Evaluation is for Must Evaluation Review (11.0).

- Upon initially entering the NCP into Must Evaluation Review, the user has the option of returning the NCP for National Control Desk Evaluation.

Immediately following Must Evaluation Review, the NCP is forwarded through the processes of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

## C. Field/Site Workflow

Chart “C. Field/Site Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which a Case File/NCP/CCD of field/site origin follows.

The field/site path begins with the process of Case File Origination (1.0).

### C.1 - Regional Organization Supervisor Approval

Immediately following the process of origination, the user must forward the Case File to the supervisor of the organization of which the Case File is originated against. This organization is indicated in block 1, Case File Number, on page one of FAA form 1800-2. Meaning, submittal from the Case File origination workflow step to workflow step C.1 sends the Case File to the organization supervisor of the organization selected in block 1 of FAA form 1800-2.

- D-C.1a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-C.1b - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the field/site path for further processing.
- D-C.1c - SRM Process: Upon approval at decision step D-C.1b, the system automatically detects if the organization originated against is configured to participate in the SRM process.
  - If the organization is not, the item forwards to workflow step C.2 only.
  - If the organization is, the item forwards to both workflow step C.2 and for Safety Review (20.0).

### C.2 - Facility/SMO Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-C.2a - Facility/SMO Review: The key purpose of this workflow step is for the user to decide to send the item for Facility/SMO Review (2.0) or for Regional Review (4.0).
  - Sending the item for Facility/SMO Review allows the item to undergo a Regional Review immediately afterwards.
  - Sending the item directly for Regional Review skips the Facility/SMO Review, however, the CM Coordinator who initially receives the item for Regional Review can override this decision; thus, send it back for Facility/SMO Review.

### D-C.1d - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for C.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-C.2d.

### D-C.2b - Distributed Review

The routing options available depend on the feedback received during the Regional Review.

- If the regional review coordinator distributed for review and received a response from one or more reviewers, the only routing option following completion of the Regional Review is to determine if the Case File needs to undergo the Inter-Regional Review.

- If the regional review coordinator distributed for review but did not receive a response from at least one reviewer, the system determines the path based on the safety risk level as illustrated in decision step D-C.2c.

#### D-C.2c - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for C.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-C.2d.

#### D-C.2d - Regional CI Only

The system presents routing options based on CI association.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### C.3 - Inter-Regional Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-C.3a - Safety Risk
  - The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for C.4 - Waiver to Installation Siting Criteria.
  - If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-C.3b.
- D-D.3b - Regional CI Only
  - If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to National Control Desk Evaluation Path or for Inter-Regional Review (6.0).
  - If the CI originated against is not regional only, the system presents the user with the following four routing options: Inter-Regional Review (6.0), Prescreen Review (8.0), A.4 - Waiver to installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### D-D.3c - Regional CI Only

Upon completion of the Inter-Regional Review, the system presents routing options based on CI ownership.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### C.4 - Waiver to Installation/Siting Criteria

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for

selection. There are no required actions at this workflow step. The only available routing option is to send the Case File along the National Control Desk Evaluation Path.

#### **C. Regional Control Desk Evaluation Path**

Continuing the Case File along the regional path sends the Case File/NCP/CCD from Regional Control Desk Evaluation (10.1) through the process of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

#### **C. National Control Desk Evaluation Path**

The National Control Desk Evaluation path begins with the process of National Control Desk Evaluation (10.0).

- If the final disposition of the Prescreen Review is “New Requirement”, upon entering the process of National Control Desk Evaluation process, the user has the option to challenge closure of the Case File. Challenging closure of a new requirement returns the Case File for Prescreen Review.

The only routing option upon completion and approval during National Control Desk Evaluation is for Must Evaluation Review (11.0).

- Upon initially entering the NCP into Must Evaluation Review, the user has the option of returning the NCP for National Control Desk Evaluation.

Immediately following Must Evaluation Review, the NCP is forwarded through the processes of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

## D. SMO Workflow

Chart “D. SMO Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which a Case File/NCP/CCD of SMO origin follows.

The SMO path begins with the process of Case File Origination (1.0).

### D.1 - Regional Organization Supervisor Approval

Immediately following the process of origination, the user must forward the Case File to the supervisor of the organization of which the Case File is originated against. This organization is indicated in block 1, Case File Number, on page one of FAA form 1800-2. Meaning, submittal from the Case File origination workflow step to workflow step D.1 sends the Case File to the organization supervisor of the organization selected in block 1 of FAA form 1800-2.

- D-D.1a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-D.1b - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the SMO path for further processing.
- D-D.1c - SRM Process: Upon approval at decision step D-D.1b, the system automatically detects if the organization originated against is configured to participate in the SRM process.
  - If the organization is not, the item forwards to workflow step D.2 only.
  - If the organization is, the item forwards to both workflow step D.2 and for Safety Review (20.0).

### D.2 - Facility/SMO Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-D.2a - Facility/SMO Review: The key purpose of this workflow step is for the user to decide to send the item for Facility/SMO Review (2.0) or for Regional Review (4.0).
  - Sending the item for Facility/SMO Review allows the item to undergo a Regional Review immediately afterwards.
  - Sending the item directly for Regional Review skips the Facility/SMO Review, however, the CM Coordinator who initially receives the item for Regional Review can override this decision; thus, send it back for Facility/SMO Review.

### D-D.1d - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for D.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-D.2d.

### D-D.2b - Distributed Review

The routing options available depend on the feedback received during the Regional Review.

- If the regional review coordinator distributed for review and received a response from one or more reviewers, the only routing option following completion of the Regional Review is to determine if the Case File needs to undergo the Inter-Regional Review.

- If the regional review coordinator distributed for review but did not receive a response from at least one reviewer, the system determines the path based on the safety risk level as illustrated in decision step D-D.2c.

#### D-D.2c - Safety Risk

The system presents routing options based on the final disposition of the safety review.

- The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for D.4 - Waiver to Installation Siting Criteria.
- If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-D.2d.

#### D-D.2d - Regional CI Only

The system presents routing options based on CI association.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### D.3 - Inter-Regional Review Needed

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for selection.

- D-D.3a - Safety Risk
  - The system presents the user with two routing options when the outcome of the safety review for the proposed change is of low, medium, or high safety risk level. The user has the option to send the Case File for Prescreen Review (8.0) or for D.4 - Waiver to Installation Siting Criteria.
  - If the outcome of the safety review for the proposed change is that of no safety risk, the system then routes the Case File based on CI ownership as illustrated in decision step D-D.3b.
- D-D.3b - Regional CI Only
  - If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to National Control Desk Evaluation Path or for Inter-Regional Review (6.0).
  - If the CI originated against is not regional only, the system presents the user with the following four routing options: Inter-Regional Review (6.0), Prescreen Review (8.0), A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### D-D.3c - Regional CI Only

Upon completion of the Inter-Regional Review, the system presents routing options based on CI ownership.

- If the CI originated against (indicated in block 1, Case File Number, on page one of FAA form 1800-2) is regional only, the routing options presented to the user is to the Regional Control Desk Evaluation Path or to the National Control Desk Evaluation Path.
- If the CI originated against is not regional only, the system presents the user with three, mutually exclusive, routing options. The user may send the case file for Prescreen Review (8.0), for A.4 - Waiver to Installation Siting Criteria, or to the Regional Control Desk Evaluation Path.

#### D.4 - Waiver to Installation/Siting Criteria

Upon submittal to this workflow step, the user must choose one CM Coordinator at the regional level to receive the item. All active CM Coordinators of the region associated to the organization originated against are available for

selection. There are no required actions at this workflow step. The only available routing option is to send the Case File along the National Control Desk Evaluation Path.

#### **D. Regional Control Desk Evaluation Path**

Continuing the Case File along the regional path sends the Case File/NCP/CCD from Regional Control Desk Evaluation (10.1) through the process of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

#### **D. National Control Desk Evaluation Path**

The National Control Desk Evaluation path begins with the process of National Control Desk Evaluation (10.0).

- If the final disposition of the Prescreen Review is “New Requirement”, upon entering the process of National Control Desk Evaluation process, the user has the option to challenge closure of the Case File. Challenging closure of a new requirement returns the Case File for Prescreen Review.

The only routing option upon completion and approval during National Control Desk Evaluation is for Must Evaluation Review (11.0).

- Upon initially entering the NCP into Must Evaluation Review, the user has the option of returning the NCP for National Control Desk Evaluation.

Immediately following Must Evaluation Review, the NCP is forwarded through the processes of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

## E. AOS Workflow

Chart “E. AOS Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which a Case File/NCP/CCD of AOS origin follows.

The AOS path begins with the process of Case File Origination (1.0) immediately followed by the process of the AOS Peer Review (14.0).

### E.1 - AOS Organization Supervisor Approval

Immediately following the AOS Peer Review process, the user must forward the case file to the supervisor of the organization of which the Case File is originated against. This organization is indicated in block 1, Case File Number, on page one of FAA form 1800-2. Meaning, submittal from the Case File origination workflow step to workflow step A.1 sends the Case File to the organization supervisor of the organization selected in block 1 of FAA form 1800-2.

- D-E.1a - Withdraw
  - Withdrawing removes the item from all inboxes and ends processing. A withdrawn item remains available for viewing by all WebCM users.
  - If the user does not choose to withdraw the Case File, they must either approve or disapprove the Case File before continuing.
- D-E.1b - Approve
  - Upon disapproval, the item returns to the originator for modification.
  - Upon approval, the item continues along the regional path for further processing.
- D-E.1c - SRM Process: Upon approval at decision step D-E.1b, the system automatically detects if the organization originated against is configured to participate in the SRM process.
  - If the organization is not, the item forwards to workflow step E.2 only.
  - If the organization is, the item forwards to both workflow step E.2 and for Safety Review (20.0).

### E.2 - AOS CM Coordinator Review

Upon submittal to this workflow step, the user must choose one AOS CM Coordinator to receive the item. All active AOS CM Coordinators for the organization of which the Case File is originated against are available for selection.

- D-E.2 - Send for Rework
  - Sending the item for rework will send the item to the selected user at workflow step E.3 - Rework Case File.
  - If the user does not choose to send the item for rework, the item continues along the AOS path for further processing.

### E.3 - Rework Case File

Upon receiving the work item for rework, the user must provide rework comments and return the item to the AOS CM Coordinator at workflow step E.2 - AOS CM Coordinator Review.

### National Control Desk Evaluation Path

Continuing the Case File along the national path sends the Case File/NCP/CCD from AOS CM Coordinator Review through to the process of National Control Desk Evaluation (10.0). The only routing option upon completion and approval during National Control Desk Evaluation is for Must Evaluation Review (11.0).

- Upon initially entering the NCP into Must Evaluation Review, the user has the option of returning the NCP for National Control Desk Evaluation.

Immediately following Must Evaluation Review, the NCP is forwarded through the processes of Prepare and Conduct CCB (13.0) followed by CCD Distribution and Implementation (16.0) and through to closure.

## F. Agenda Workflow

Chart “F. Agenda Workflow” of the WebCM Case File/NCP/CCD Workflow Charts illustrates the high-level path of which an agenda follows.

### F.1 - Agenda Origination

The CCB CM Lead or the Board Secretariat is responsible for creating an electronic agenda for the desired work item(s) for their CCB. Once complete, the agenda work item displays in the inbox of the creator with the option to further process the agenda or cancel.

- D-F.1 - Cancel
  - Canceling the work item will remove all work items associated to the agenda and end the workflow for the agenda.
  - Choosing not to cancel the agenda will submit the agenda for further processing at workflow step F.2 - Notify Attendees.

### F.2 - Notify Attendees

Upon submittal to this workflow step, the user must choose the Board Secretariat of the associated CCB to receive the work item. The Board Secretariat has the option to further process the agenda or cancel.

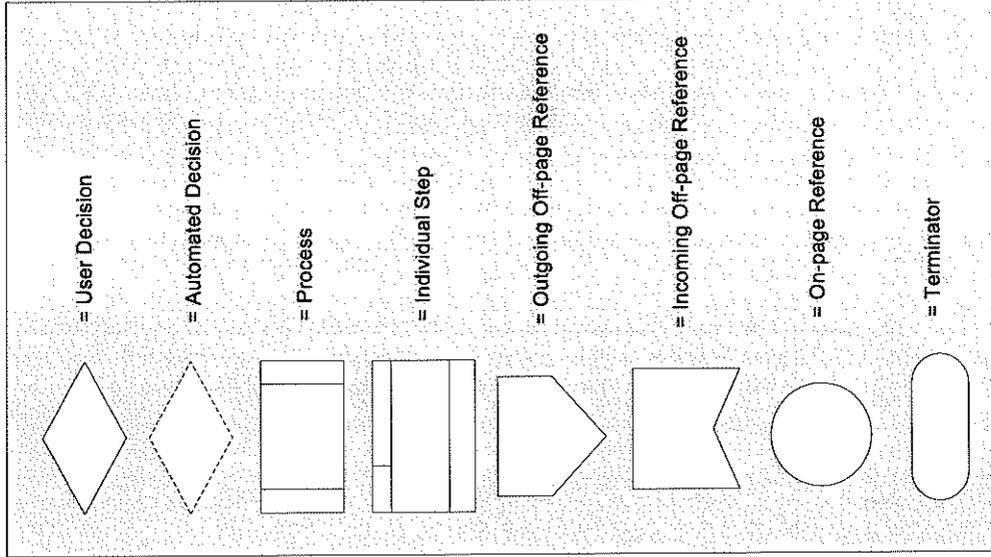
- D-F.2 - Cancel
  - Canceling the work item will remove all work items associated to the agenda and end the workflow for the agenda.
  - Choosing not to cancel the agenda requires the Board Secretariat to notify the attendee(s) before allowing submittal to workflow step F.3 - Prepare for CCB Meeting for further processing.

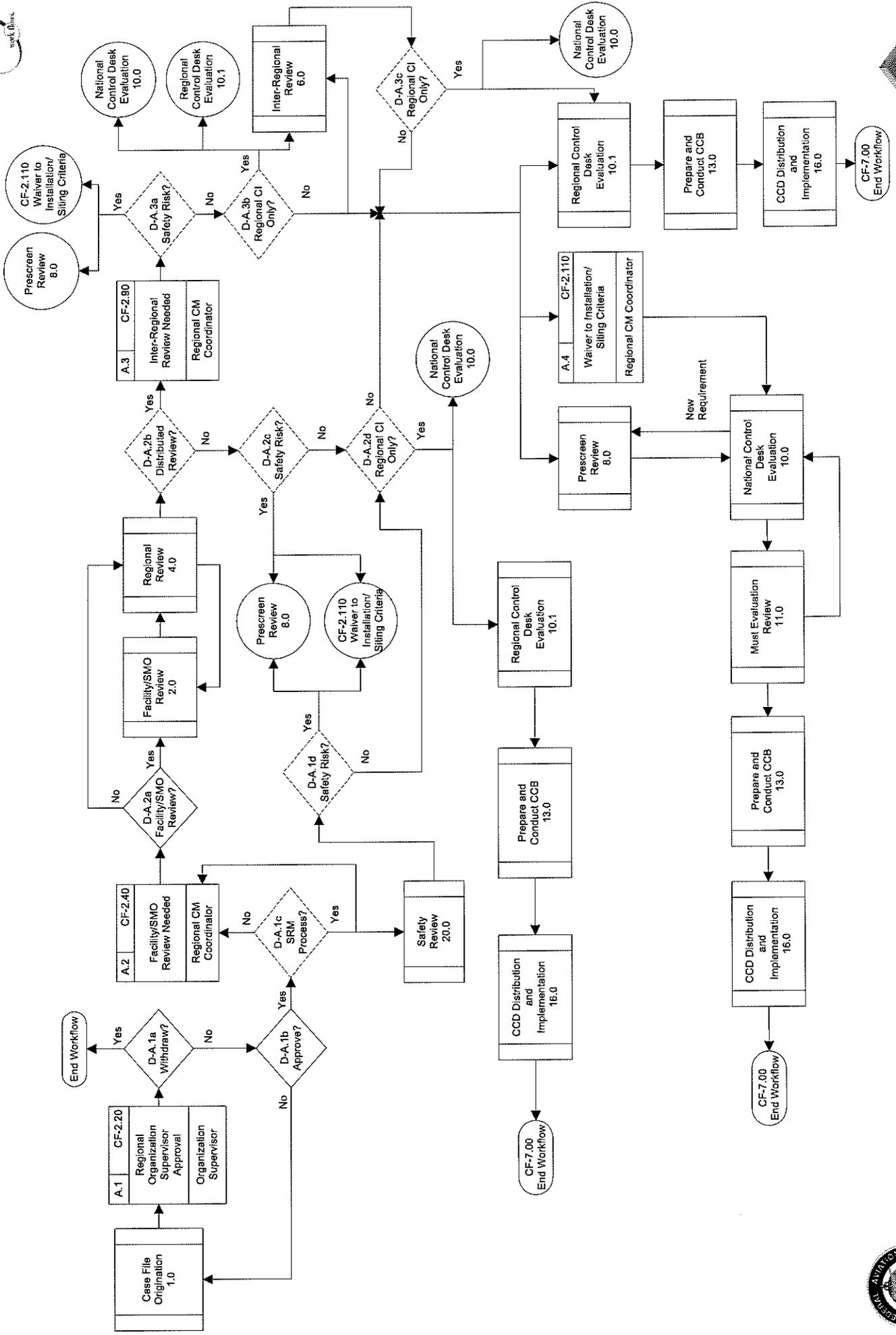
### F.3 - Prepare for CCB Meeting

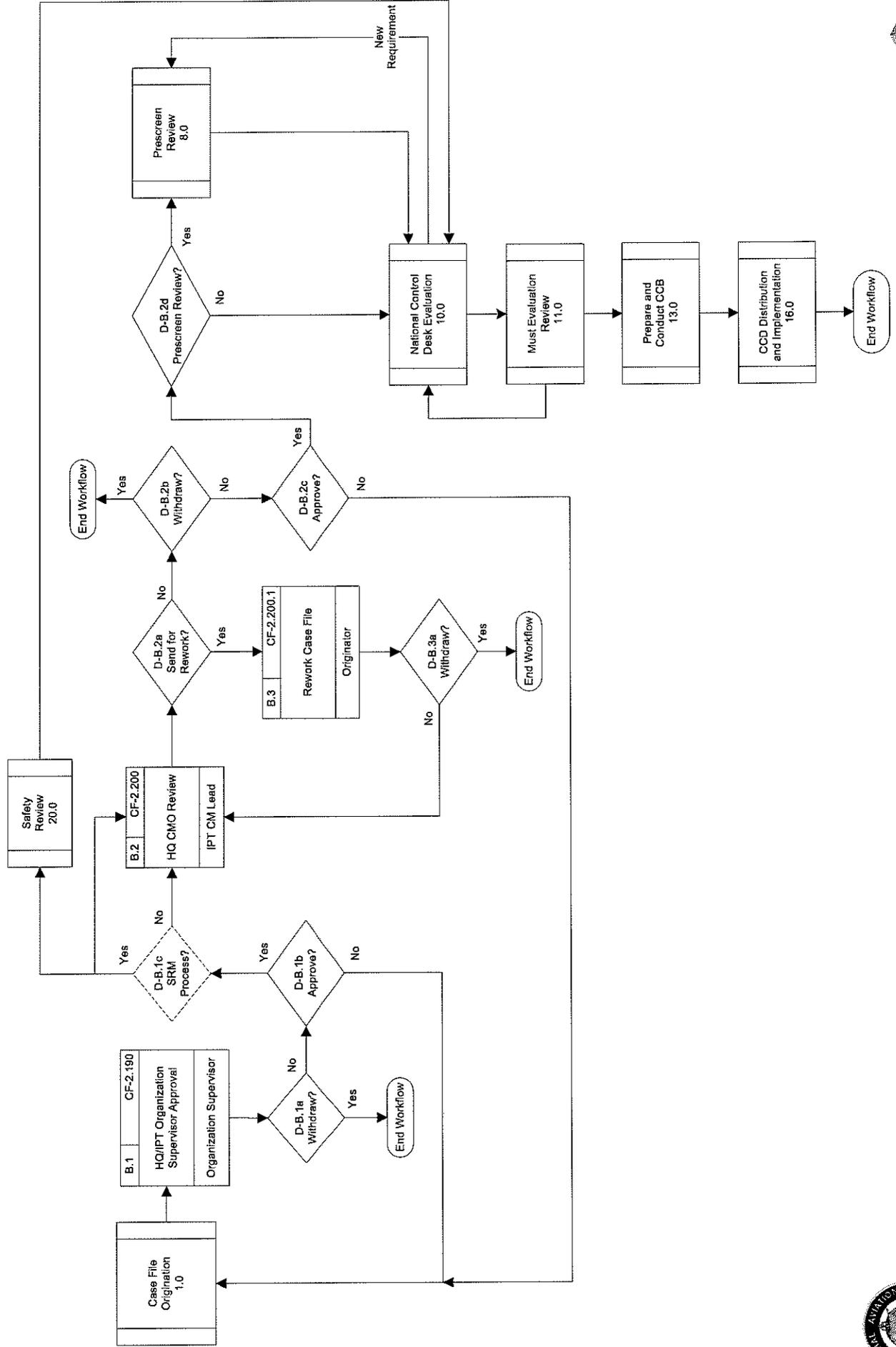
Upon submittal to this workflow step, the user must choose the CCB CM Lead or Board Secretariat of the associated CCB to receive the work item. This workflow step allows for planning of the CCB meeting. Items can be removed from or added to and re-ordered on the agenda. Once the planning phase is complete, the agenda must be submitted to workflow step F-4 - CCB Meeting for further processing. Upon submittal from this workflow step, the system automatically submits NCPs included on the agenda for formal adjudication from workflow step 13.1, Draft CCD Actions, to 13.2, Adjudicate.

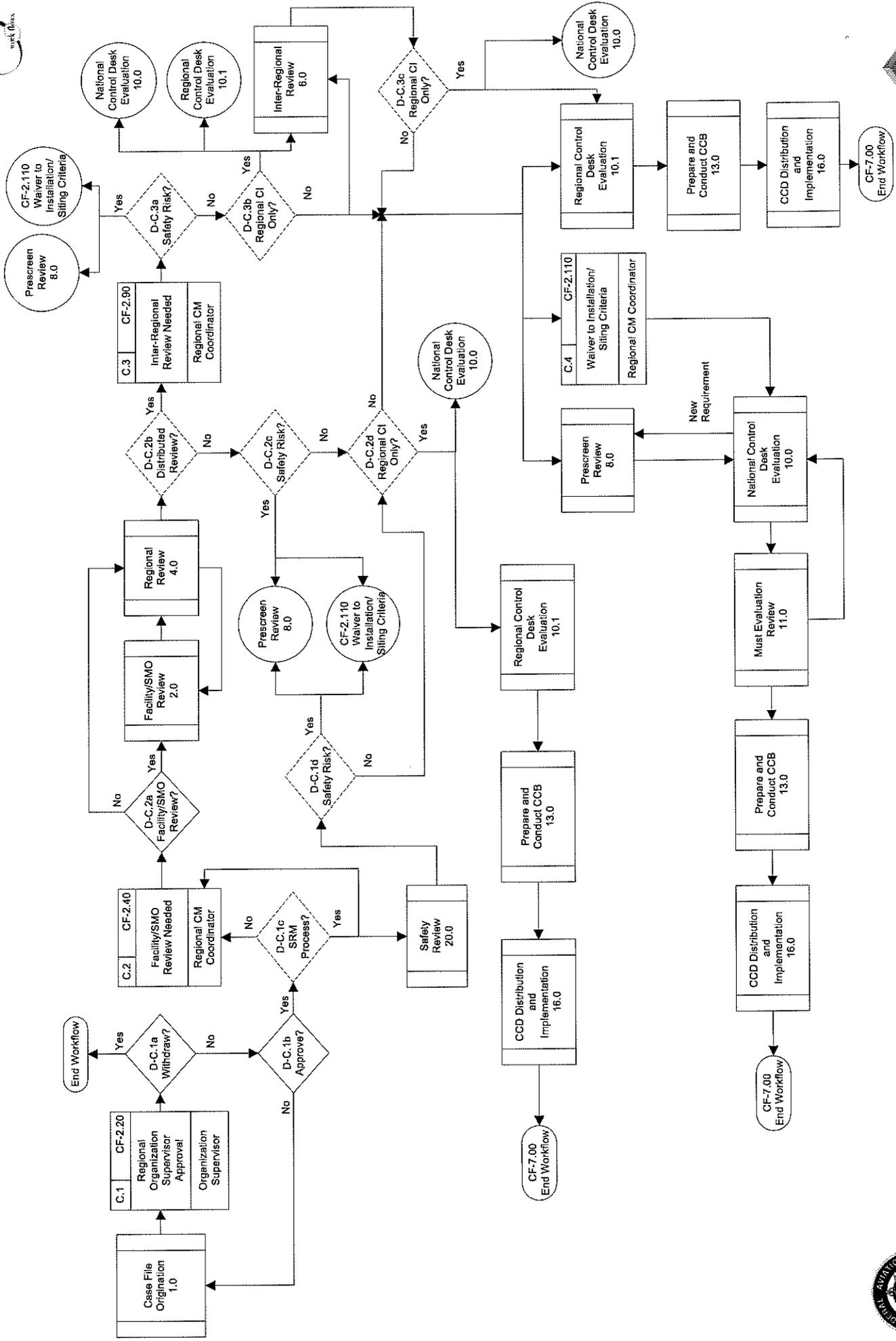
### F.4 - CCB Meeting

During or after the CCB meeting, the Board Secretariat or the CCB CM Lead may enter comments pertaining to the meeting and the associated work items. Upon submittal from this workflow step the agenda is closed.

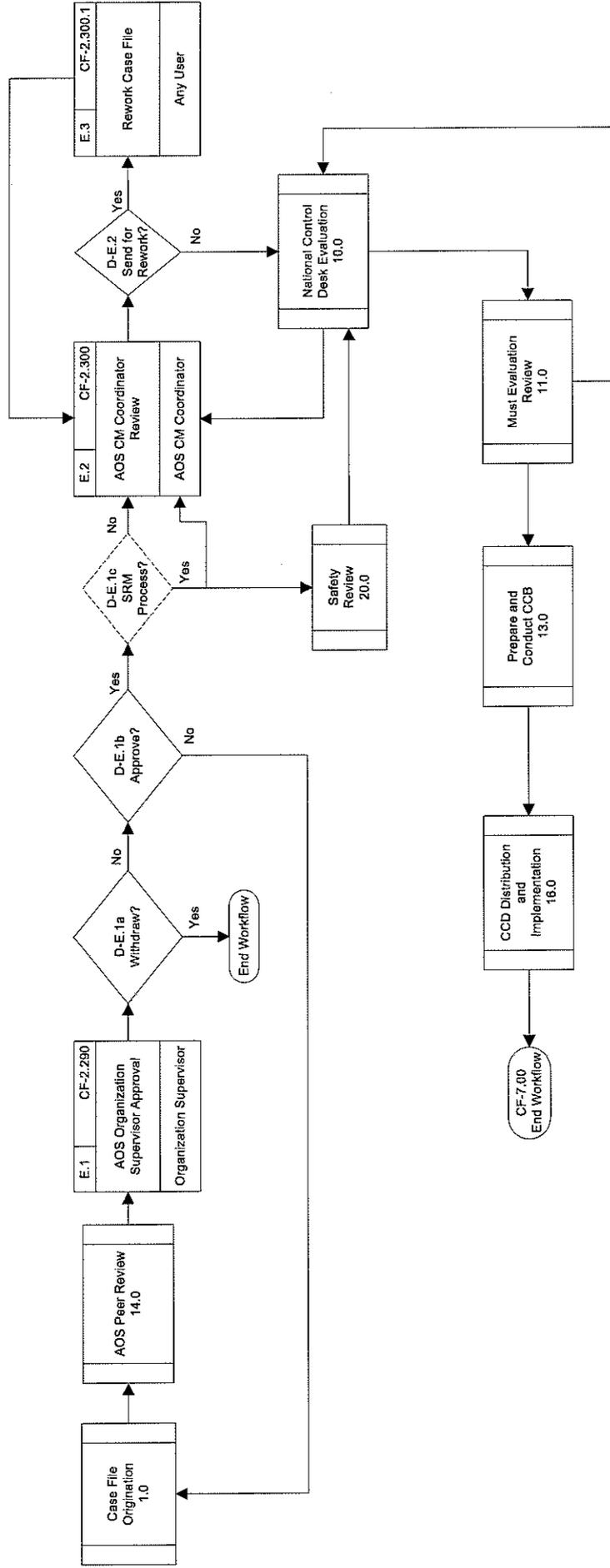


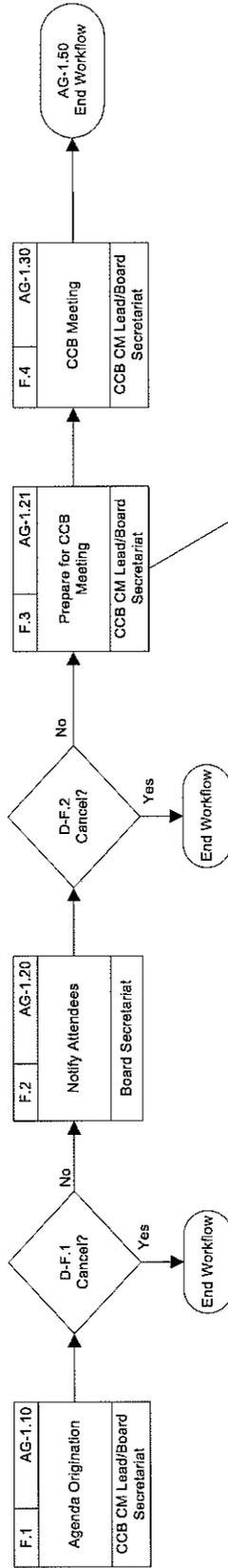


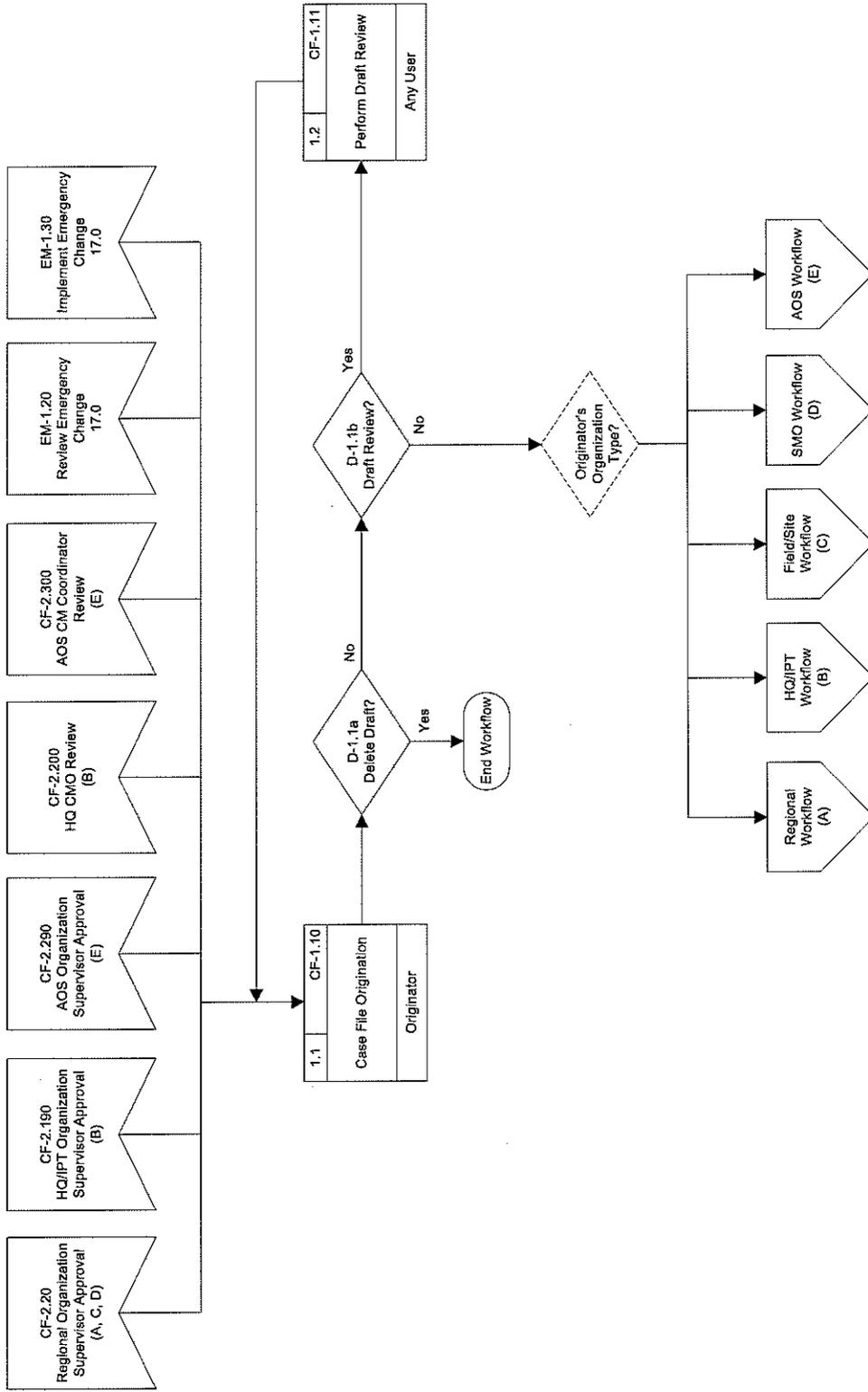


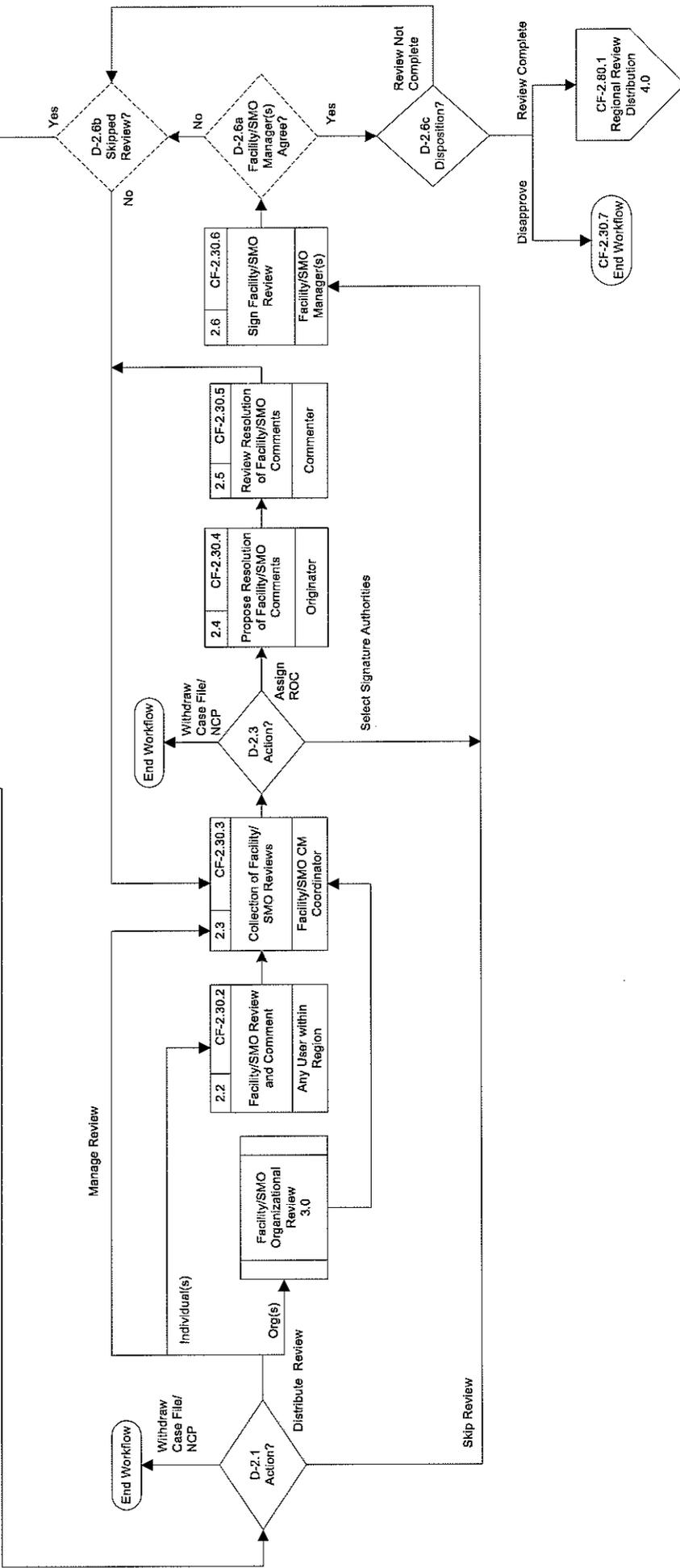
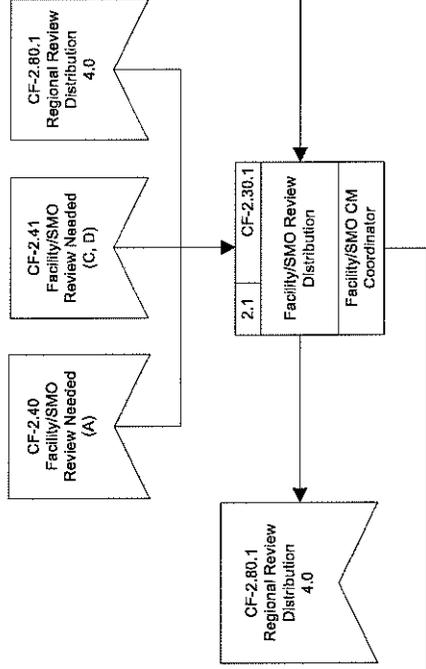


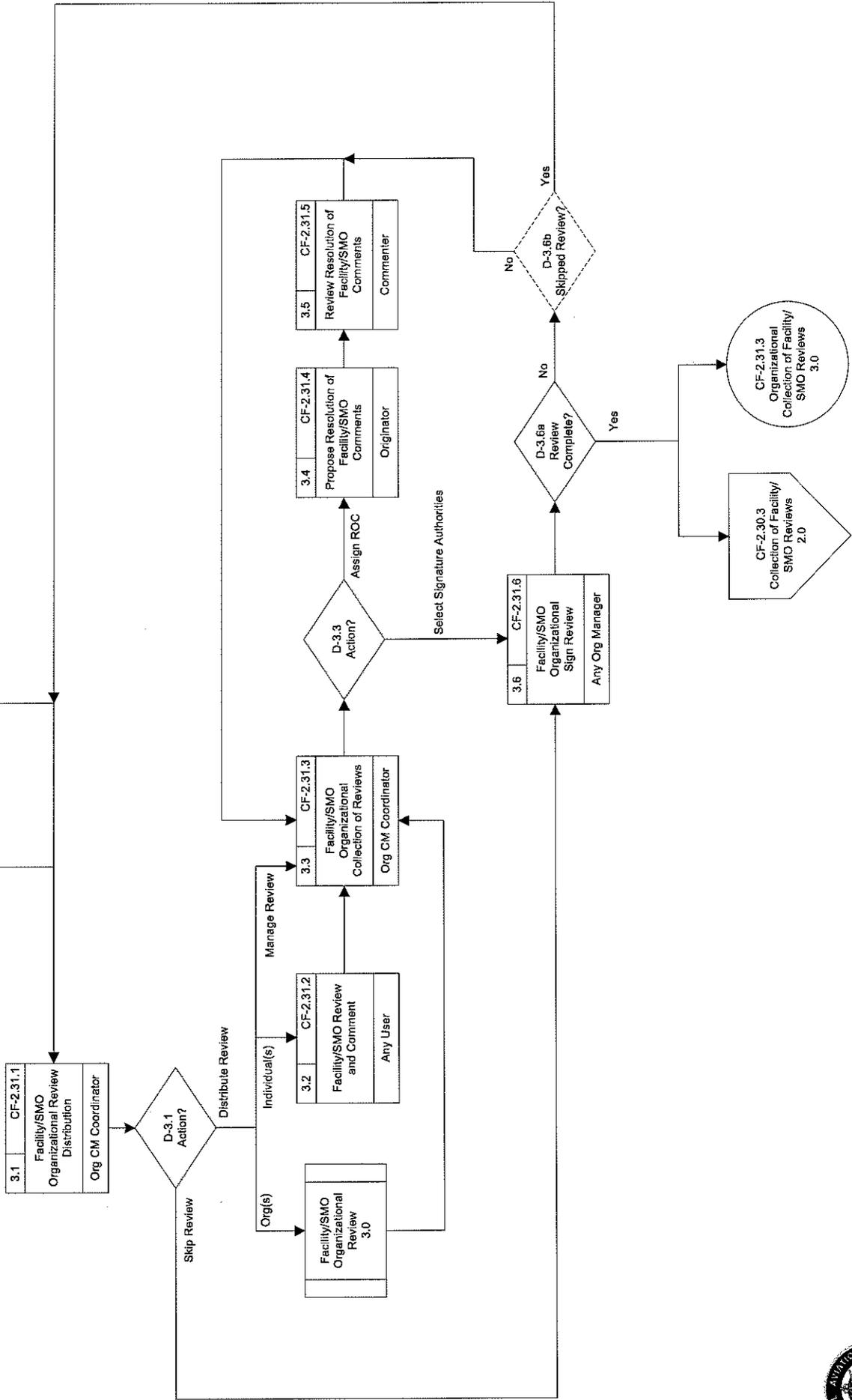
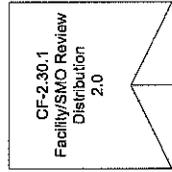


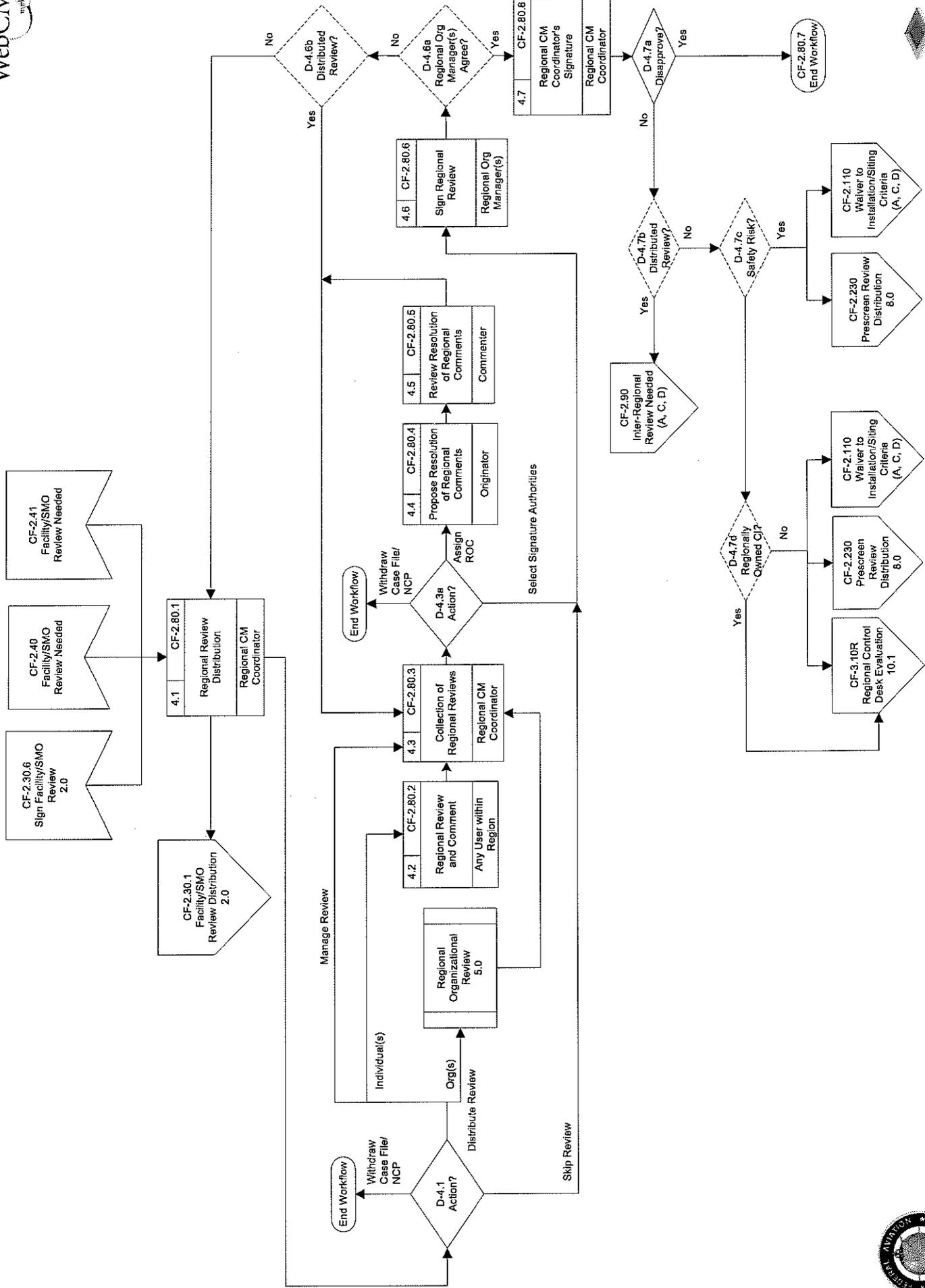






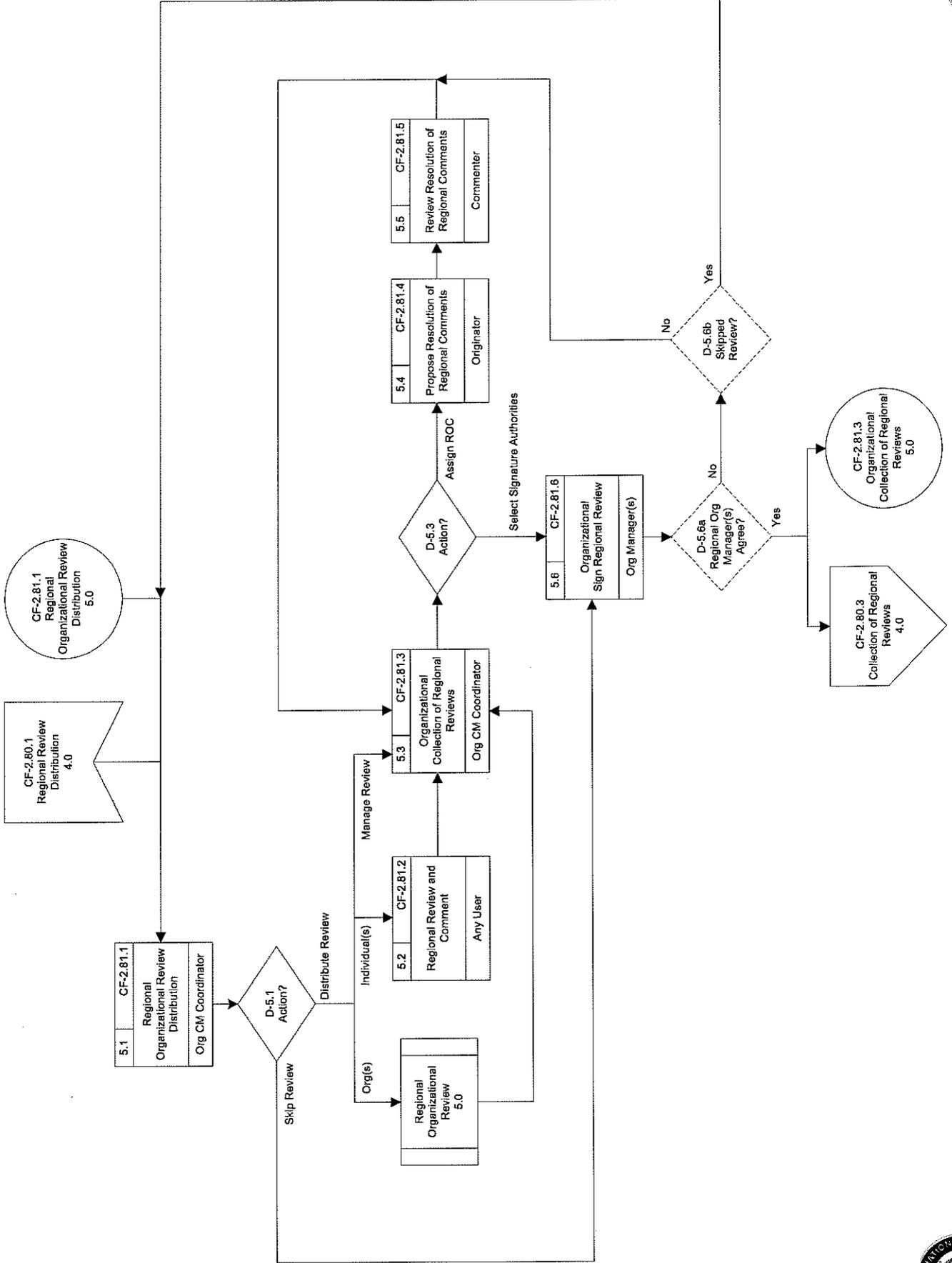


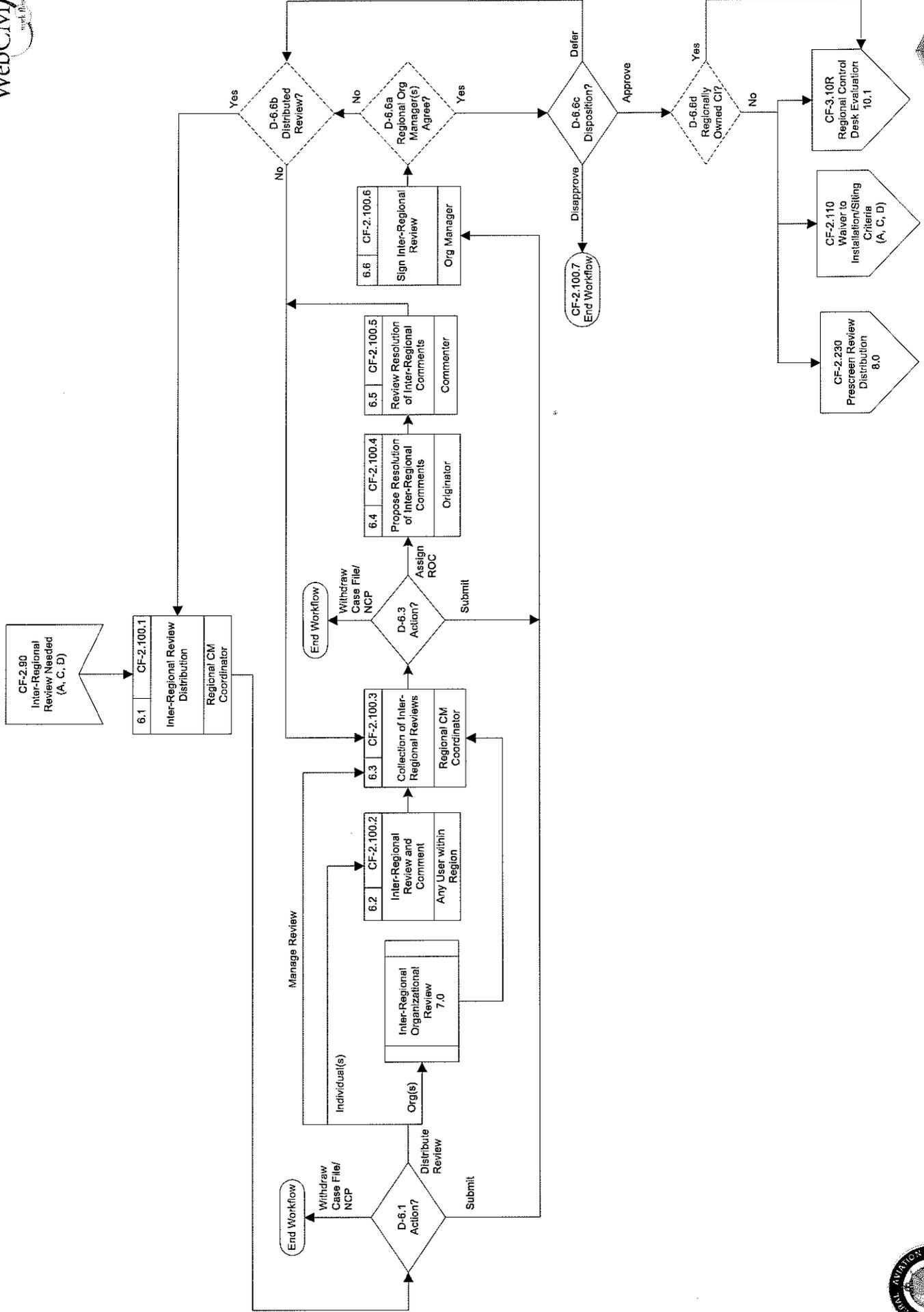


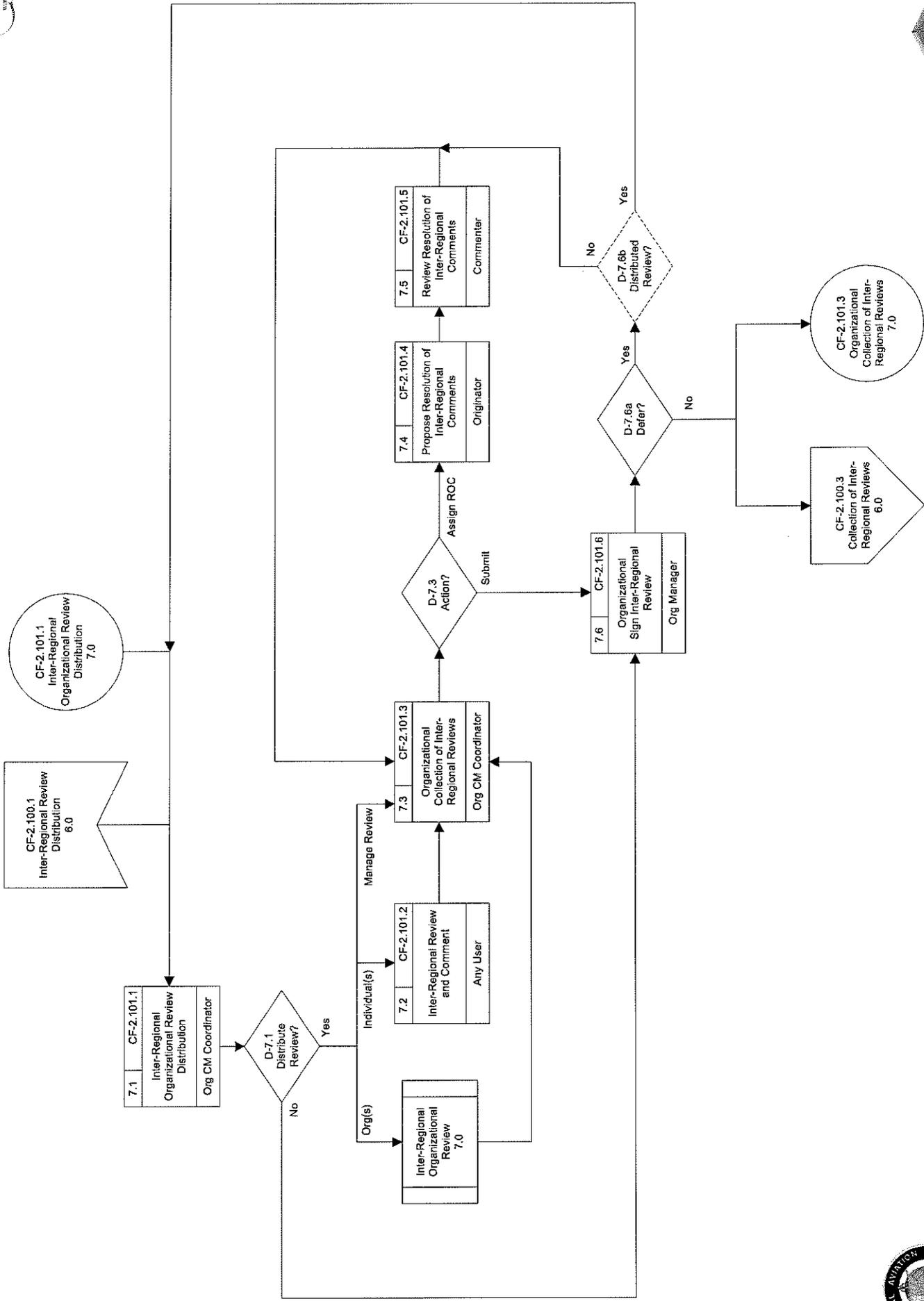


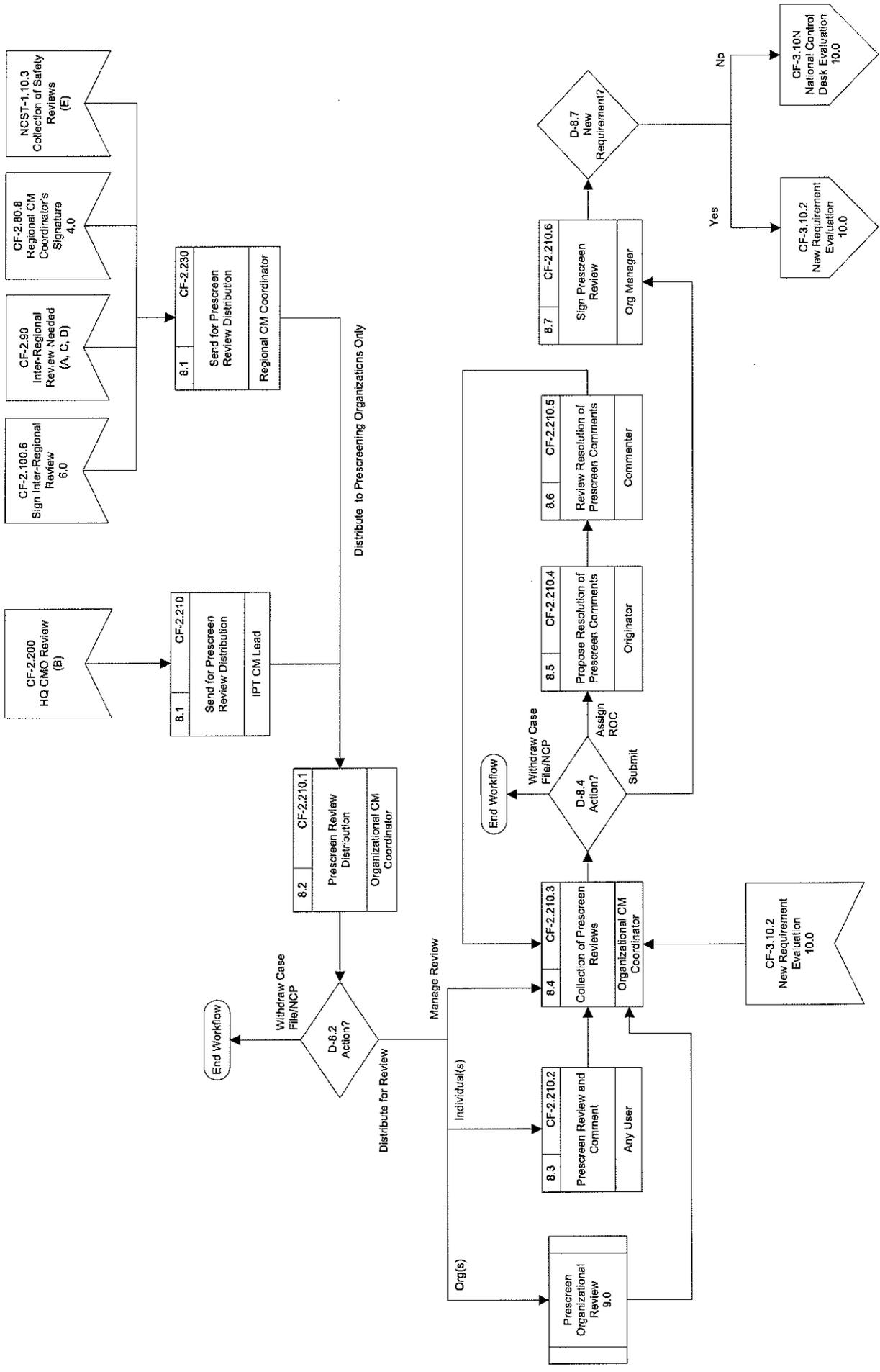
4.0 Regional Review

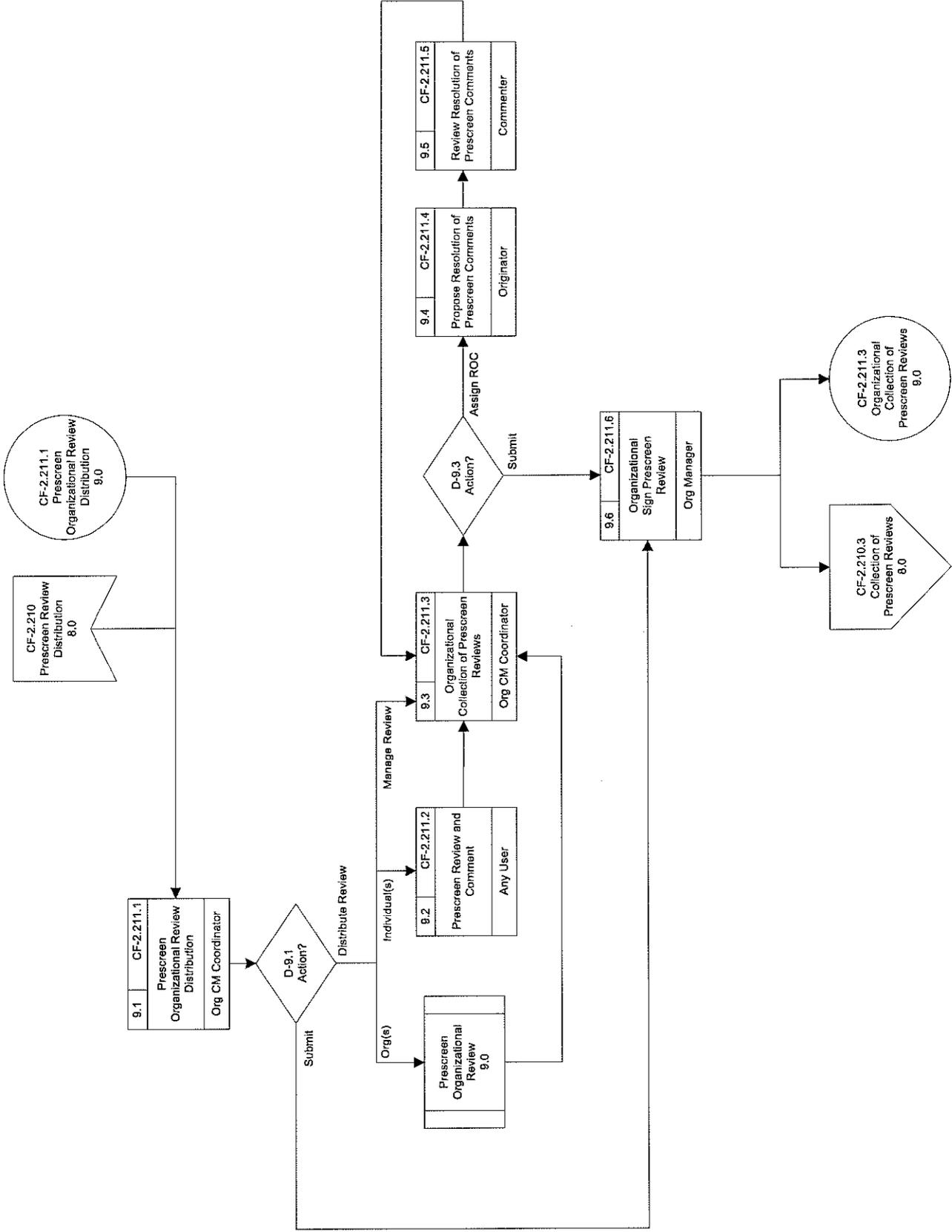


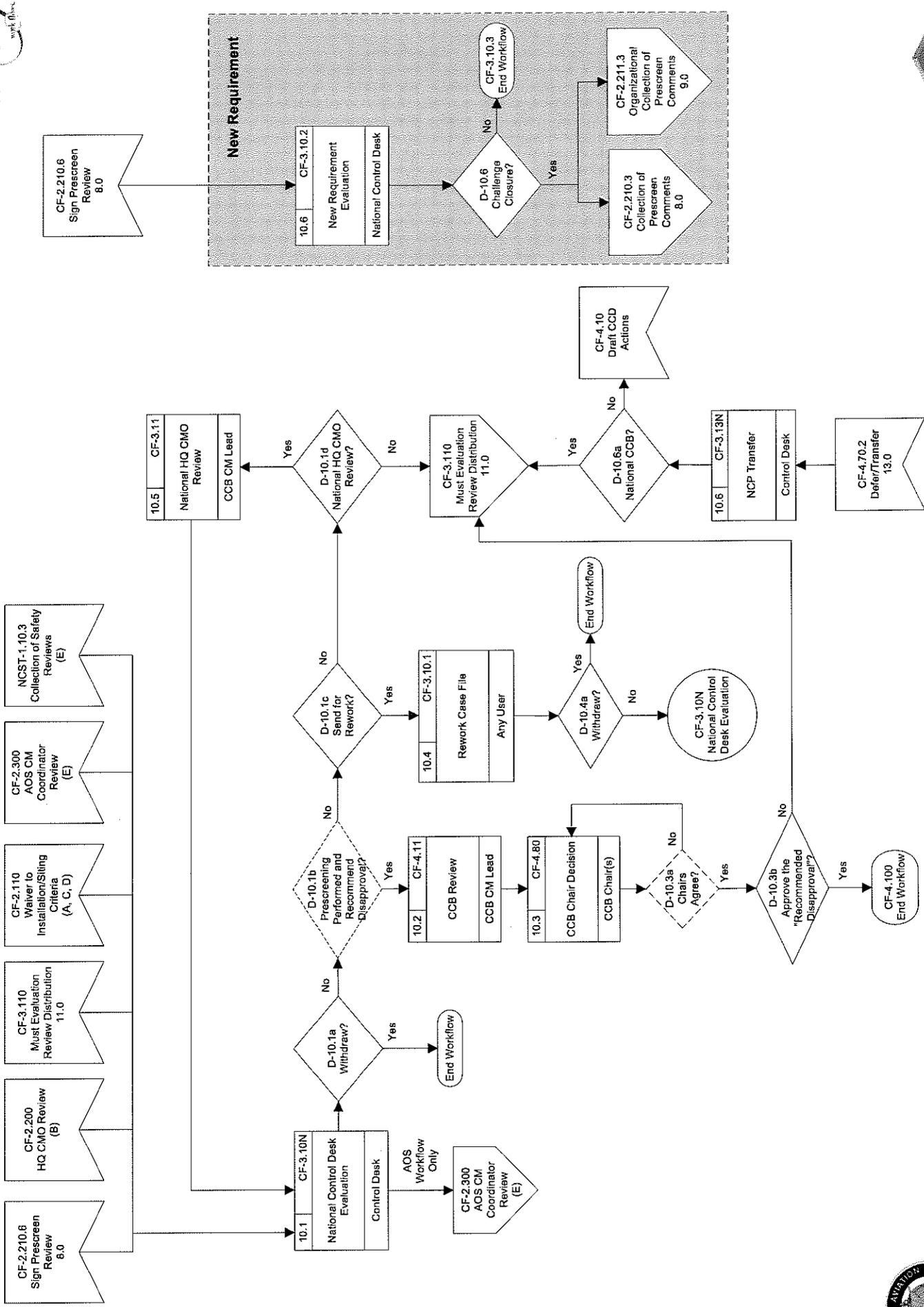


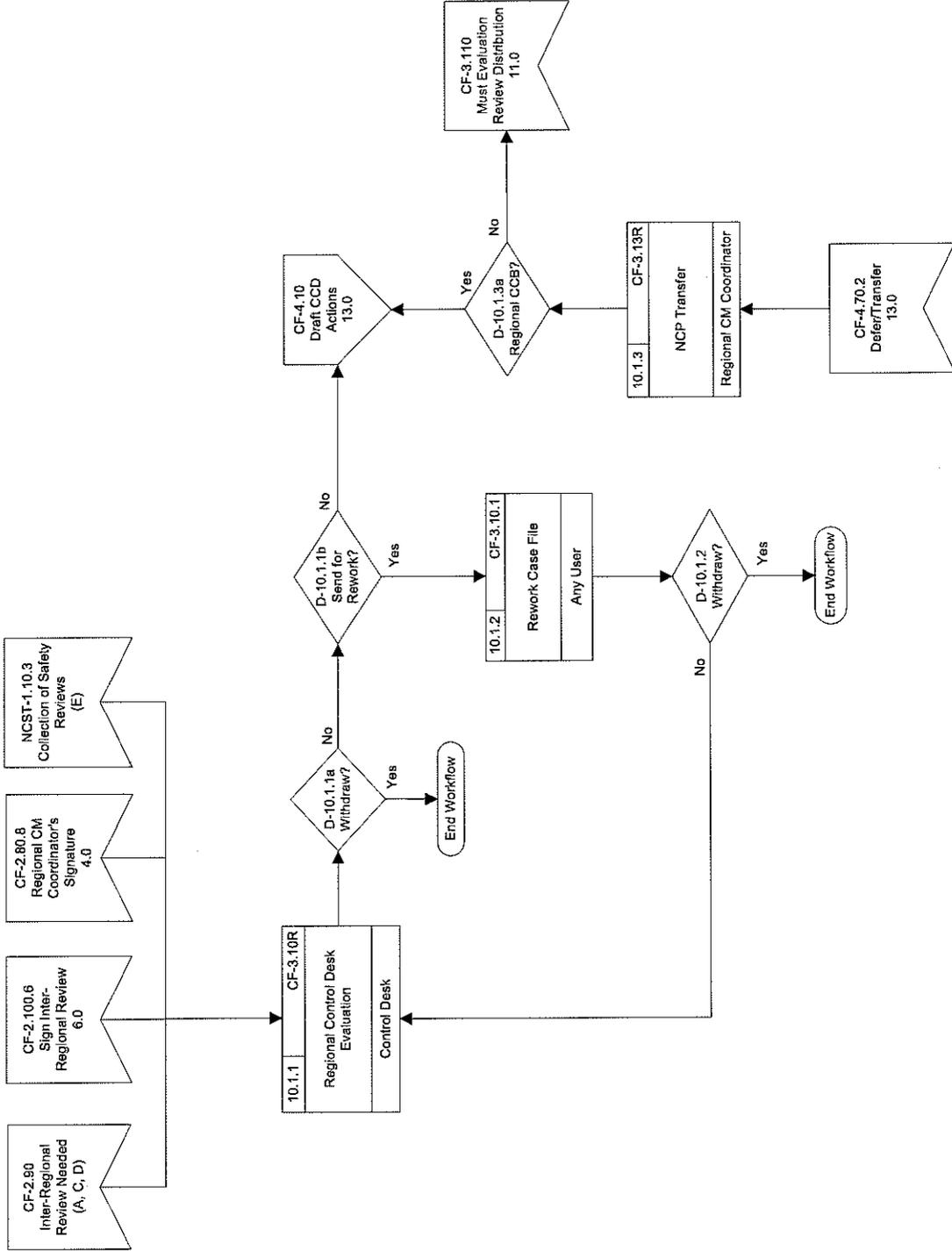


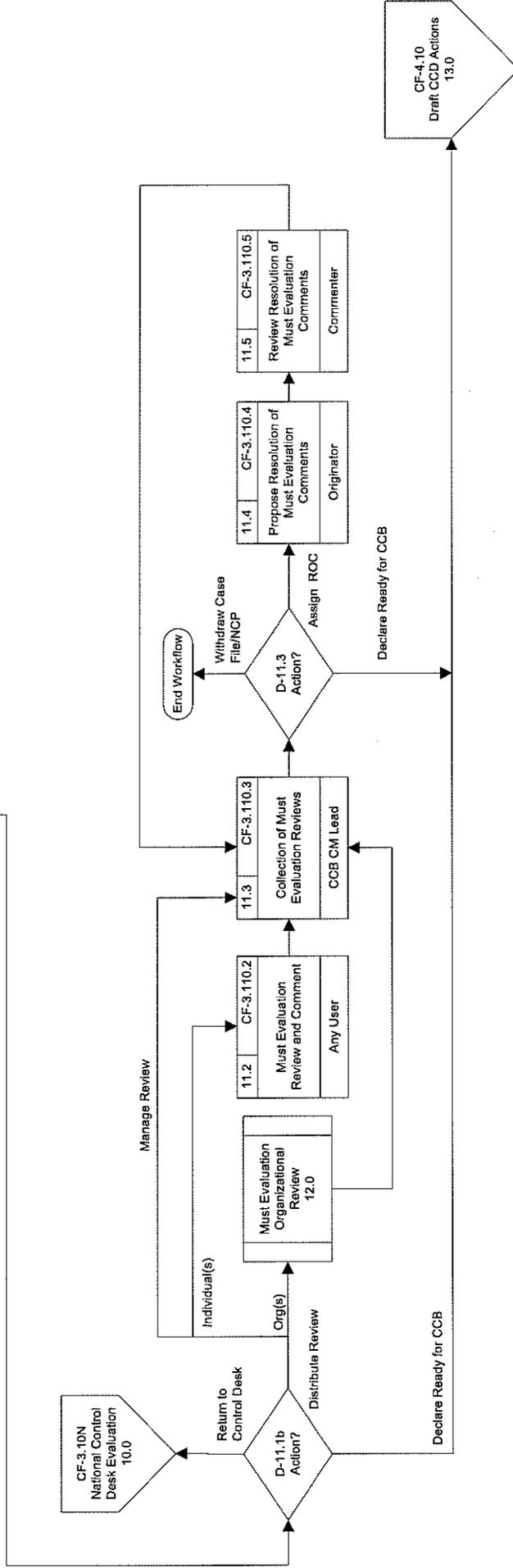
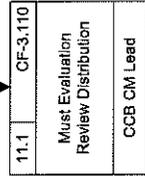
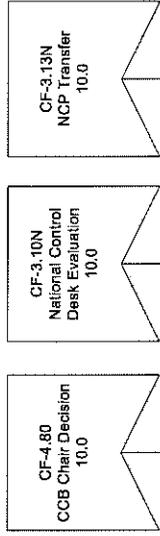


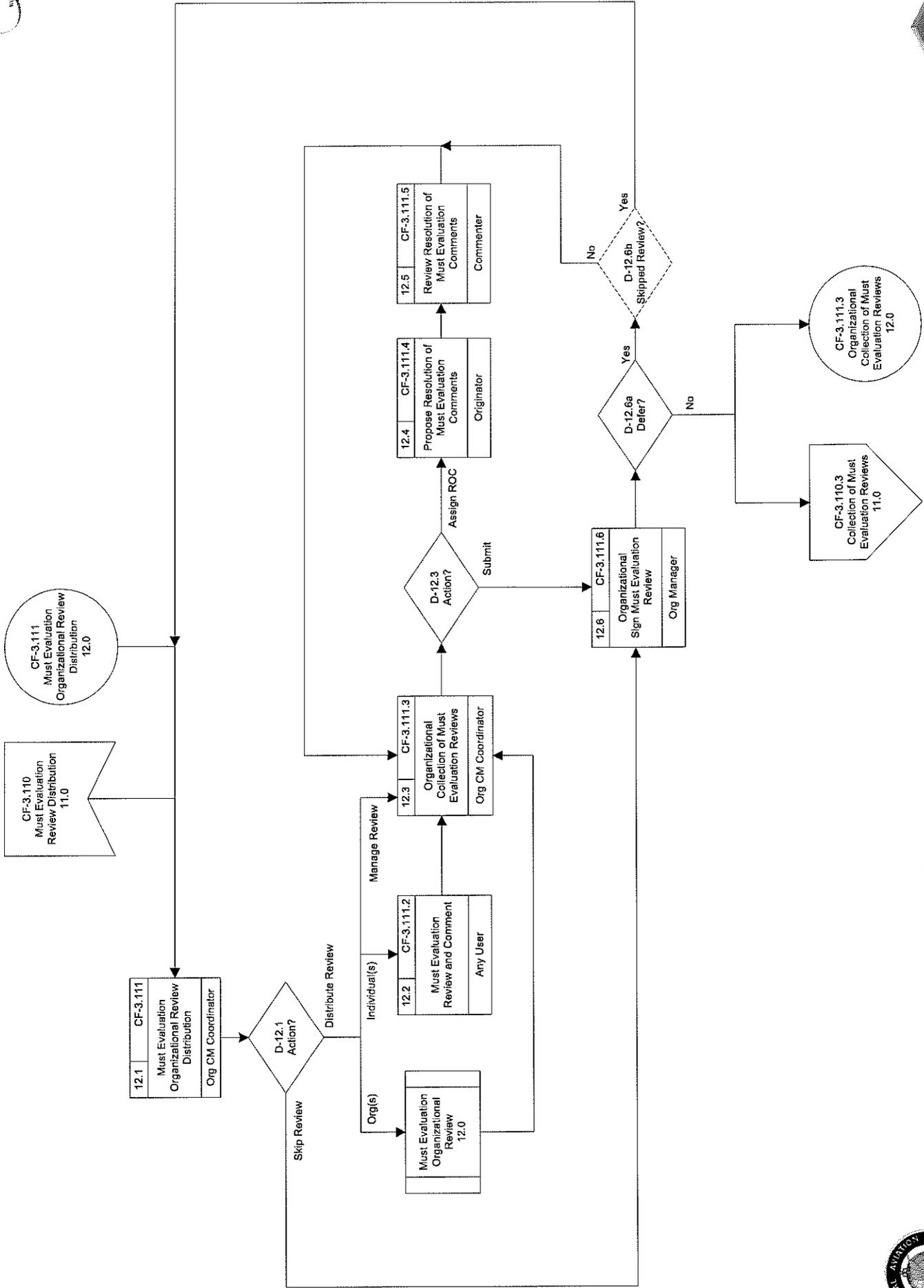


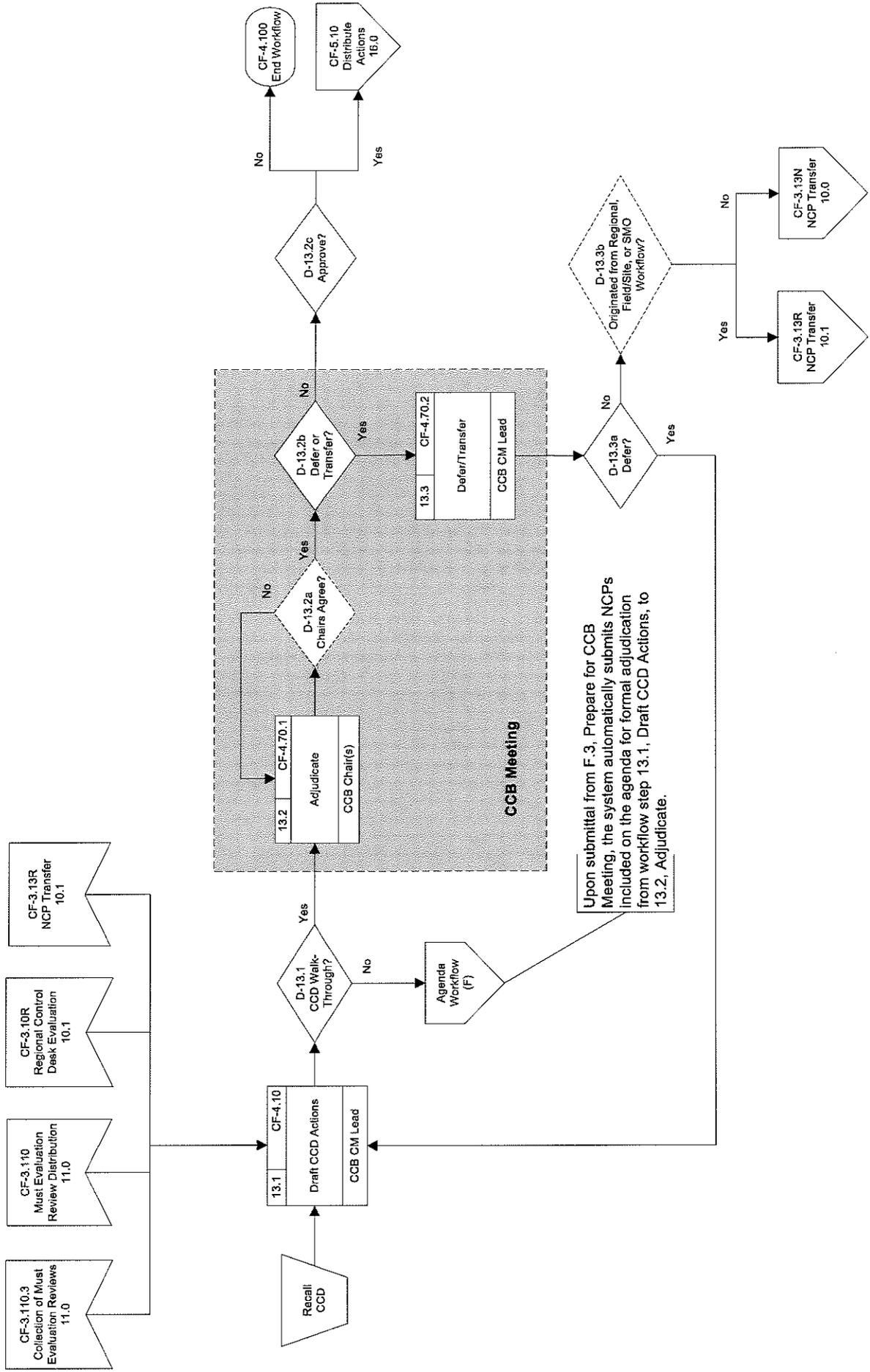


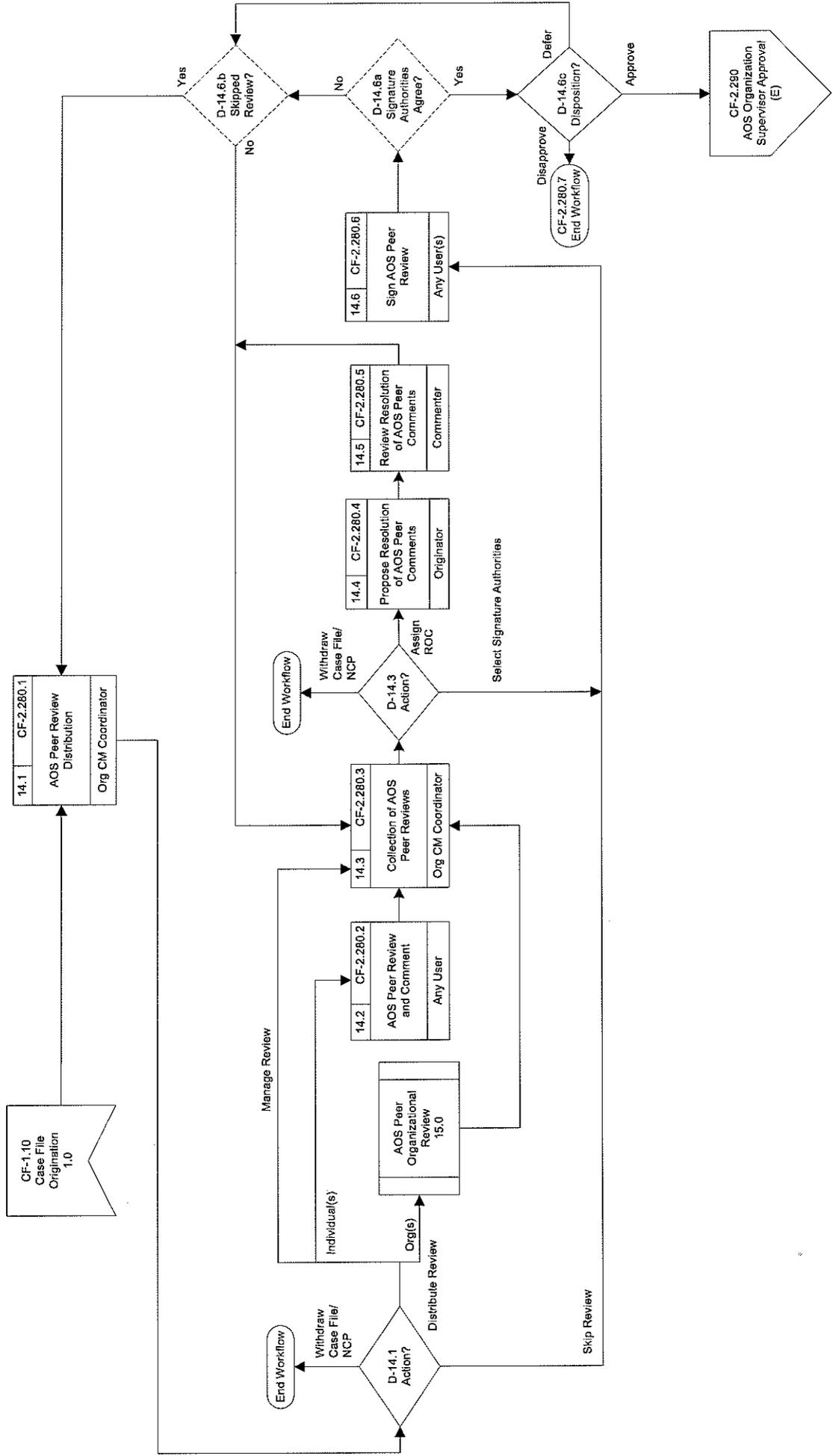


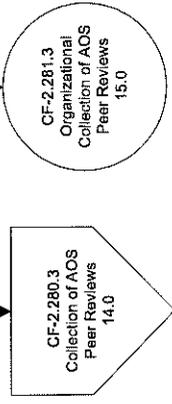
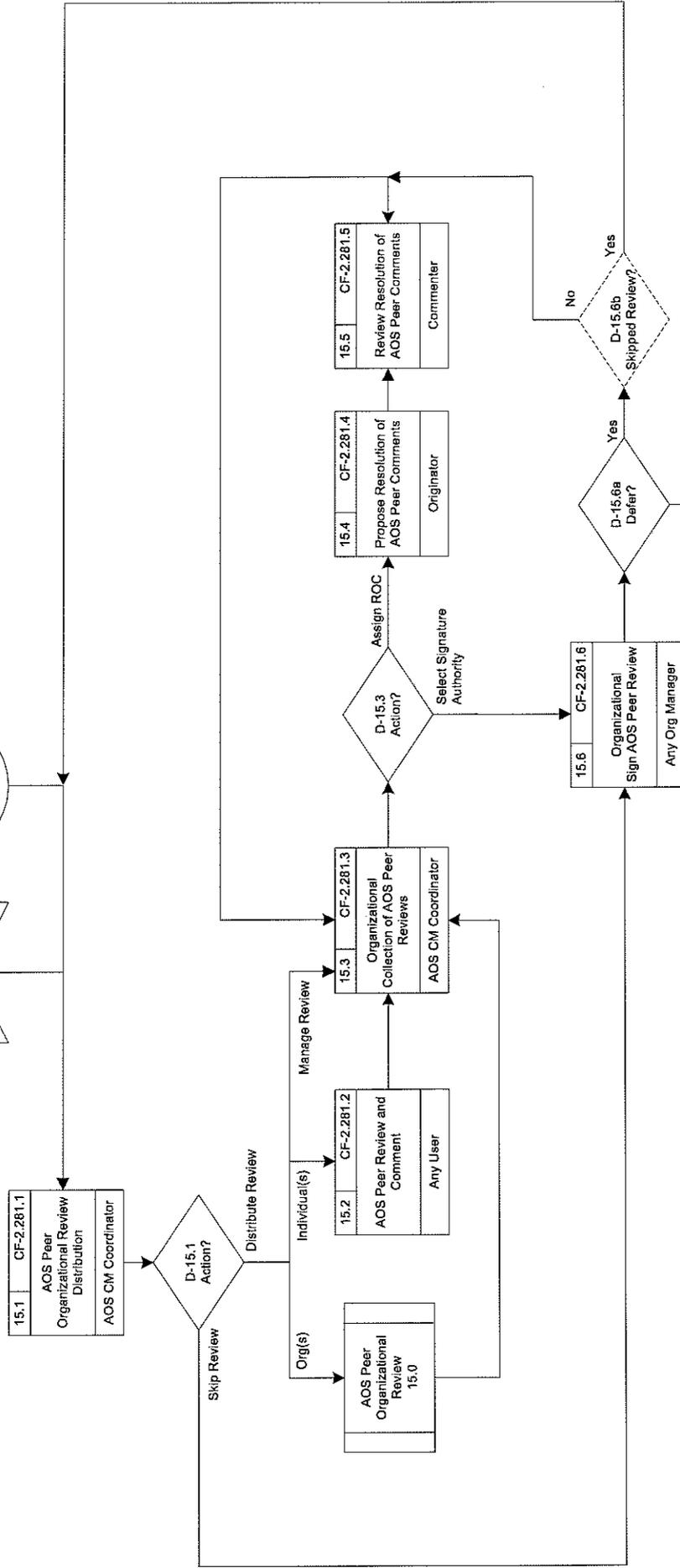
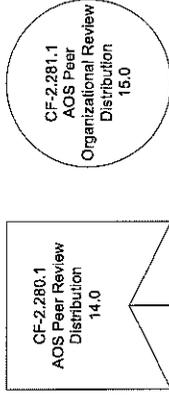


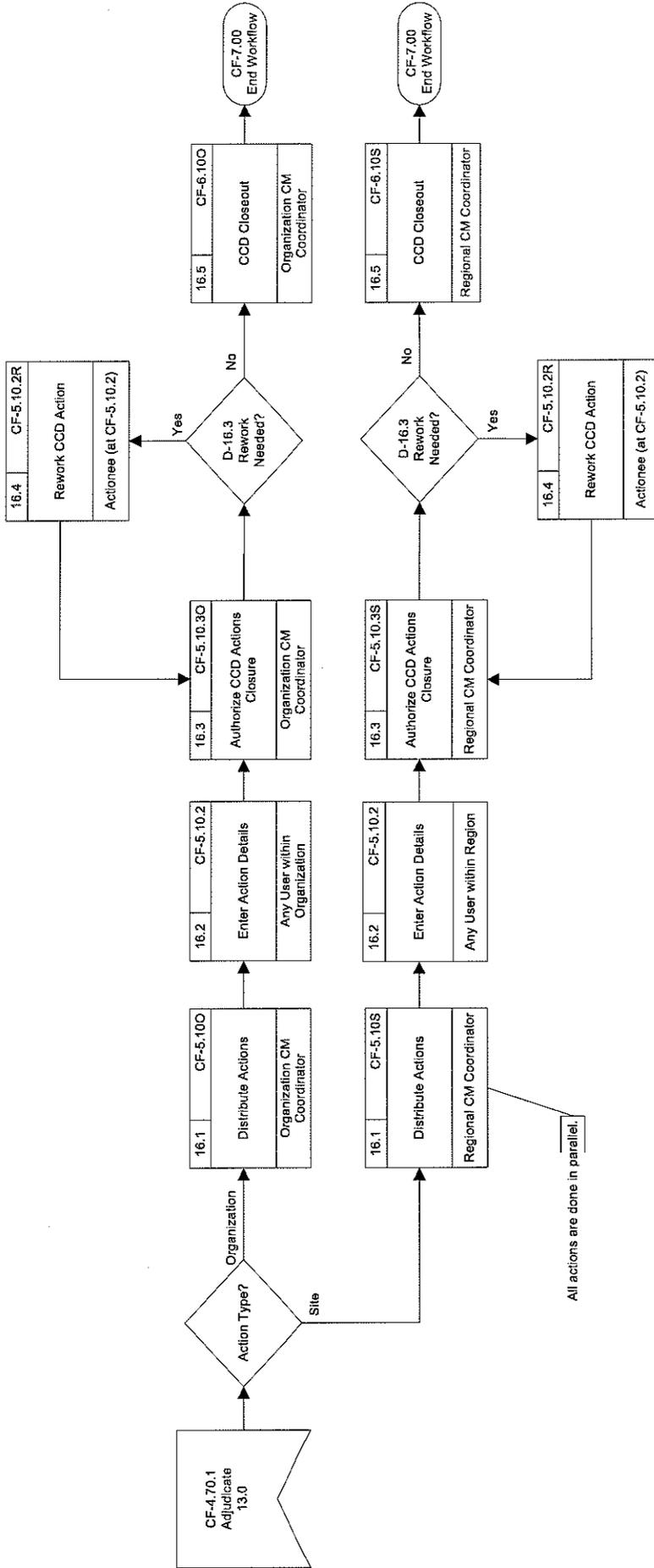






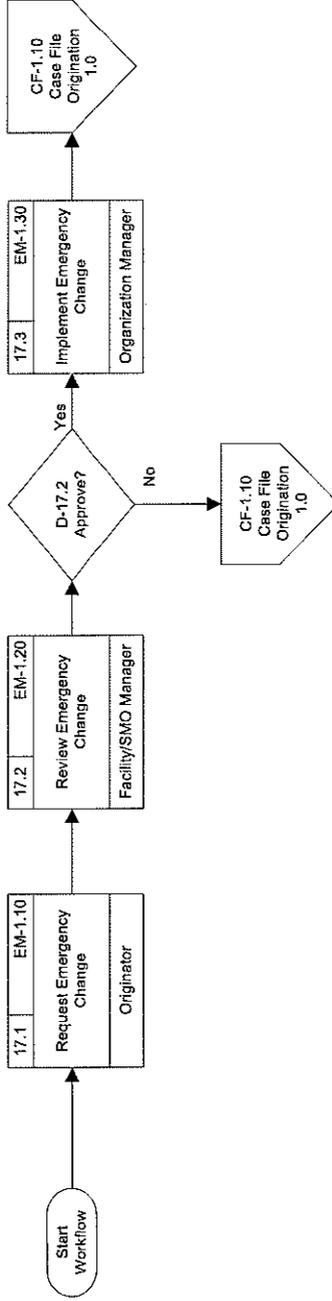


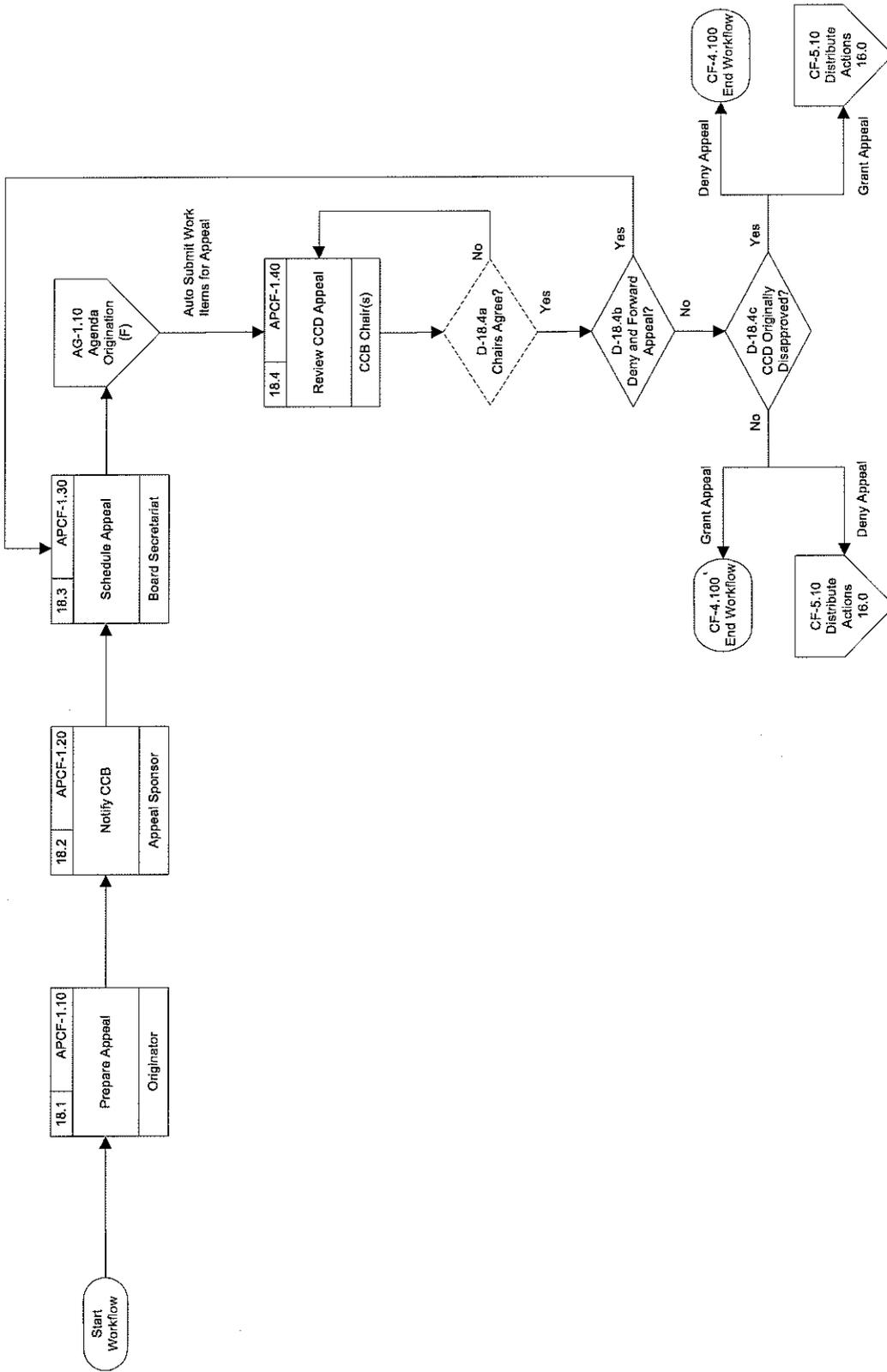


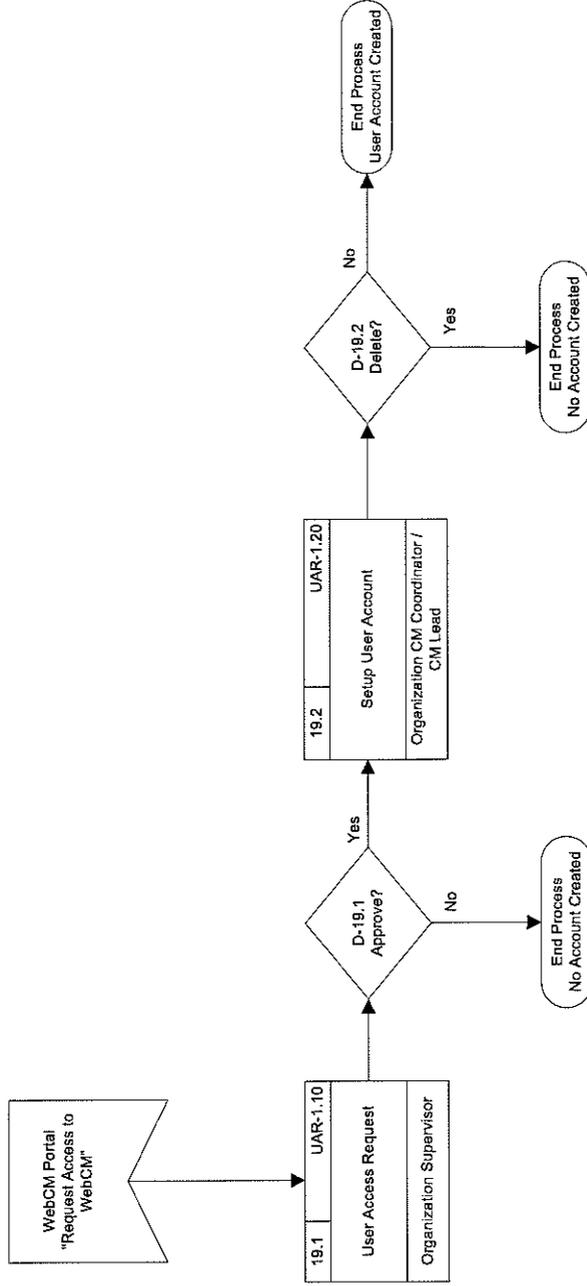


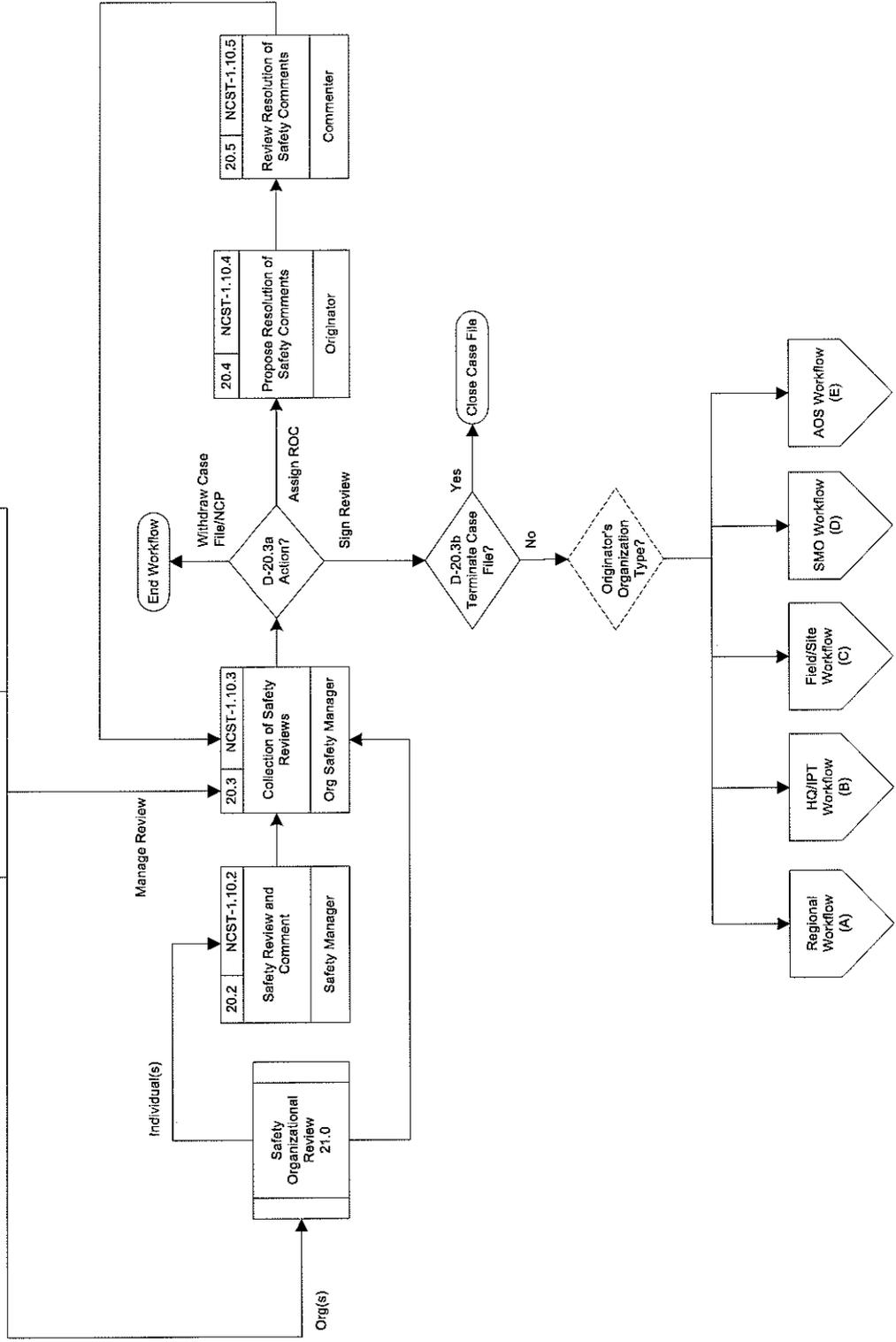
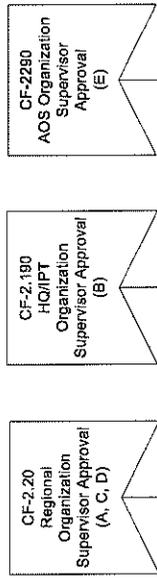
All actions are done in parallel.

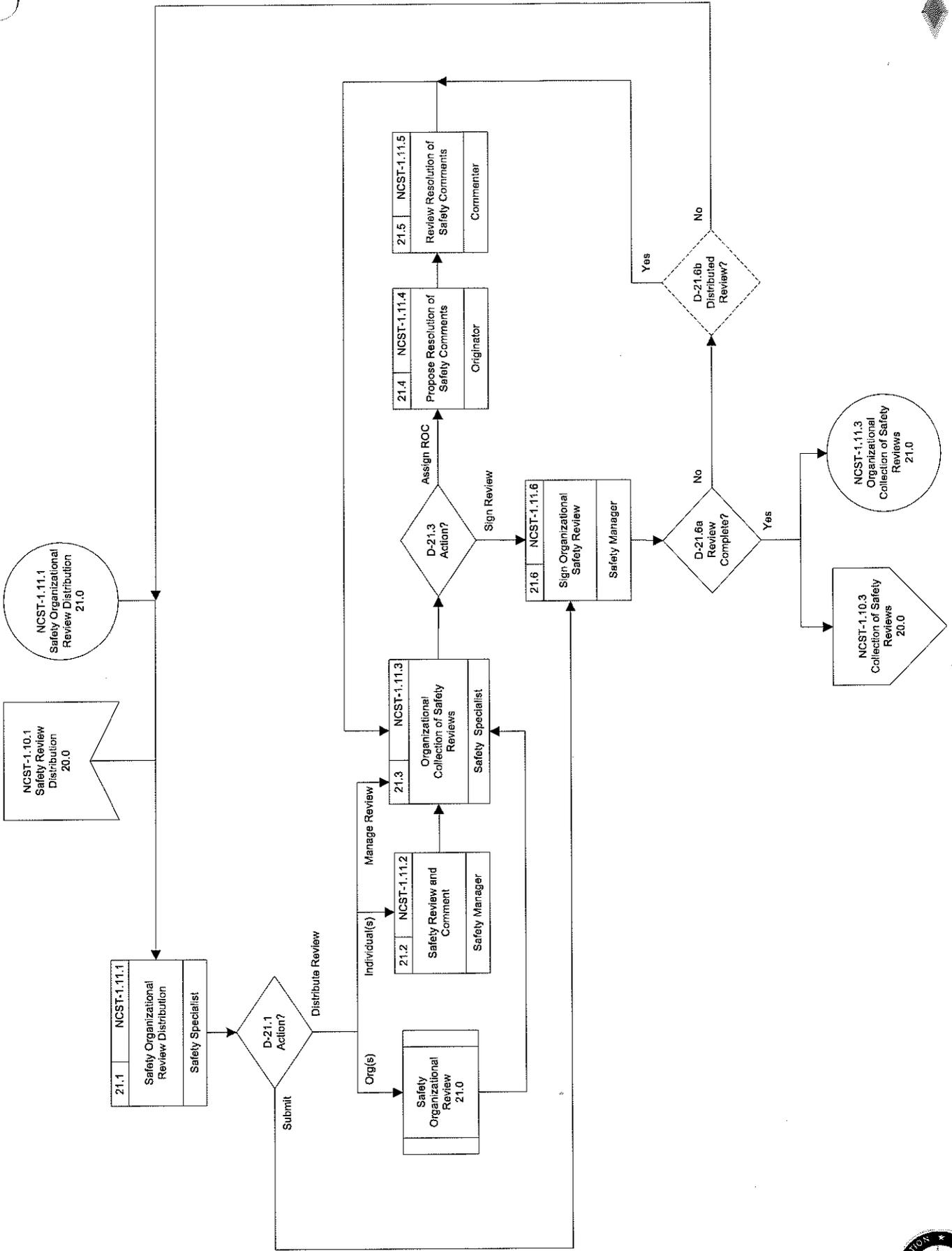












21. Safety Org Review

