# Revision History

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<th>Author</th>
<th>Description of Version</th>
<th>Date</th>
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<td>1.0</td>
<td>Lynn Anslow</td>
<td>Initial Partial Draft</td>
<td>10/01/2007</td>
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<td>1.1</td>
<td>Helga Schoeman</td>
<td>Completed sections: 1.1-2.5, 4.1-4.1.2, 4.1.4-4.1.5, 7.1-7.7 Drafted sections: 3.1-3.5 and 4.1.3</td>
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</table>
# Table of Contents

## 1. Introduction
- 1.1 WebOPSS Functions
- 1.2 About this User Guide
  - 1.2.1 Field Guide User Capabilities

## 2. Using WebOPSS
- 2.1 WebOPSS System Requirements
- 2.2 Accessing WebOPSS
- 2.3 Screen Navigation and Common Practices
  - 2.3.1 Standard Web Navigation
  - 2.3.2 The WebOPSS Environment
  - 2.3.3 Hyperlinks
  - 2.3.4 Breadcrumbs
  - 2.3.5 Button Meanings
  - 2.3.6 Using the Search Filter
  - 2.3.7 Context-Sensitive Help (CSH)
- 2.4 System Timeout
- 2.5 Maximizing the Workspace
- 2.6 Logging Out
- 2.7 WebOPSS Technical Support

## 3. Inbox
- 3.1 WebOPSS Home Tasks
- 3.2 Summary
- 3.3 Tasks
- 3.4 Messages
- 3.5 Discussions
- 3.6 Drafts

## 4. Data Management
- 4.1 Operators
  - 4.1.1 Maintain Operators
  - 4.1.2 My Operators
- 4.2 Operator Data
  - 4.2.1 Addresses
  - 4.2.2 Airworthiness Directive Notification (AD Notification)
  - 4.2.3 Aircraft
  - 4.2.4 Airports
  - 4.2.5 Authorized Areas
  - 4.2.6 Territories
  - 4.2.7 Deviations
  - 4.2.8 DBAs
  - 4.2.9 Exemptions
  - 4.2.10 Insurance
1. Introduction

WebOPSS (Web-based Operations Safety System) is the next generation of application automation used by the Flight Standards Service (AFS) to collect data on operator activities, disseminate FAA policy to the operator and inspector communities, and generate and manage Authorizing Documents on behalf of the operator. The system is also a repository containing some of the most up-to-date data about the airline industry.

1.1 WebOPSS Functions

The WebOPSS system has four primary functions:

- To generate regulatory and policy templates used to create operator-specific Authorizing Documents
- To generate and manage operator-specific Authorizing Documents
- To aid in the collection of non-regulatory, operator-specific data
- To provide a reporting capability on data and metadata elements contained within the system.

1.2 About this User Guide

This WebOPSS Field User Guide provides information on the use of each application function within the Web Enabled Business Operations Safety System (WebOPSS) that a Certificate Holding District Office (CHDO) needs to use in order to fulfill the functions listed in “1.1 WebOPSS Functions” section. The processes in this guide are directed primarily towards field users, Aviation Safety Inspectors (ASI), Aviation Safety Assistants (ASA), and Aviation Safety Technicians (AST). For more specific administrative functions, System administrators, AFS SMEs, and AFS HQ Administrators will want to refer to the WebOPSS HQ User Guide.

For the purpose of this document, the following terminology will be used:

- **User**: this term will be used to identify any person accessing the WebOPSS system. Users are made up of all FAA Field, ASI, ASA, AST, and Administration individuals.
- **Designator**: this term will be used to identify Certificate Holders/operators.
- **Authorizing Documents**: this term will be used in reference to OpSpecs, MSpecs, TSpecs, LOAs, and Waivers. (For more information on Authorizing Documents, see Chapter “5 Authorizing Documents Management” on page 103.)

While it is not necessary to read this guide from beginning to end, it has been structured to introduce simple concepts and building block processes early and proceed to more complex procedures. Therefore, it may be helpful to read the introduction and scan preceding sections before attempting the operations of later sections.
1.2.1 Field Guide User Capabilities

WebOPSS is designed as a roles-based system, meaning that a variety of standard Roles exist that have certain Permissions associated with each of them. Though the name of the specific roles available are not relevant for the purpose of this document, there are generic actions associated with the different user levels in the system:

- **Field users**: have a wide range of capabilities in WebOPSS. They essentially have full access to all CHDO functionality, but cannot Issue Authorizing Documents or change Inspectors.
- **ASI users**: have full access to all CHDO functionality.
- **ASA and AST users**: have a similar range of capabilities as the Field user, but cannot sign or issue Authorizing Documents.

2. Using WebOPSS

This section describes the system requirements for running WebOPSS, login and logout procedures, and an introduction to the interface.

2.1 WebOPSS System Requirements

WebOPSS is a Web application completely compatible with Internet Explorer Version 7 or higher. While WebOPSS may operate to some extent with other versions of Internet Explorer and other browsers, it is only guaranteed to work with Internet Explorer Version 7. The following is the minimum recommended system configuration for a workstation running WebOPSS in an Internet Explorer Version 7 browser:

- PC with 1.5 gigahertz or higher processor clock speed recommended; 1 GHz minimum required (single or dual processor system); Intel Pentium/Celeron family, or AMD K6/Athlon/Duron family, or compatible processor recommended
- 128 megabytes (MB) of RAM or higher recommended (64 MB minimum supported; may limit performance and some features)
- 1.5 gigabytes (GB) of available hard disk space
- Super VGA (800 x 600) or higher-resolution video adapter and monitor
- Keyboard and Microsoft Mouse or compatible pointing device

2.2 Accessing WebOPSS

WebOPSS is a web application, meaning all capabilities are available through a web browser. While most of the capabilities of the system will work on any browser, the system is only tested for compatibility with Internet Explorer.

To access WebOPSS, you will need either an active FAA domain account or a WebOPSS account. To request a WebOPSS account, contact the WebOPSS Technical Support at AFS-WebOPSS@faa.gov.
To Access WebOPSS:
1. In the Internet Explorer address bar, type “http://webopss.avs.faa.gov” and press Enter on the computer keyboard. The FAA Log in screen appears:

![Figure 2.1: FAA Log In](image)

2. In the **User Name** text box, type in the user name provided by the WebOPSS administrator.
3. In the **Password** text box, type in the password provided by the WebOPSS administrator.
4. Click **Log In**. The WebOPSS home page appears:
2.3 Screen Navigation and Common Practices

2.3.1 Standard Web Navigation

WebOPSS is a web-based application, meaning that it is accessed via the internet. This allows for users to access the system wherever they are, provided they have internet access. To open WebOPSS, users must first open their web browser, a software program designed to allow people to access the internet; Internet Explorer, Netscape Navigator, or Firefox are some examples of popular internet browsers. Once the browser is opened, in a screen called a “window,” users can access WebOPSS by typing the appropriate URL. The URL is the specific address of a web page and is entered in the address bar of the browser—in the figure below, the URL is “http://www.faa.gov/.”
2.3.2 The WebOPSS Environment

Once you have logged into the system, the WebOPSS home page appears:

![WebOPSS Layout](image)

While the contents of this page may vary depending on the privileges the user has been granted in the system, upon first presentation, the same three general areas appear. These areas are:

1. **The Header**: this area contains the FAA logo.
2. **The Left Navigation**: this area contains all the menu options to initiate the various WebOPSS operations.
3. **The Content Area**: this area changes the controls displayed depending on the operation selected and displays the breadcrumb path (the **WebOPSS Home** link in the figure above) and a link to context-sensitive Help topics.

2.3.3 Hyperlinks

Hyperlinks (also called simply “links”) are commonly used throughout the WebOPSS system. Hyperlinks are blue, underlined words or phrases that serve as a navigation element to another section of the WebOPSS system. By clicking on the hyperlink, users quickly access other relevant areas of the system. Once used, the hyperlink color changes from blue to brown to help users identify which links have been previously-accessed. However, hyperlinks have unlimited reference usage and can be used at any time they are present.

For example, by clicking on the **Help** hyperlink, users are instantly able to access context-sensitive information relating to the area of WebOPSS that is being currently accessed:
2.3.4 Breadcrumbs

The WebOPSS breadcrumb consists of hyperlinks that appear horizontally across the top of the content area below the header. This provides links back to each previous topic or subtopic page that the user navigated through in order to get to the current page. Breadcrumbs are a handy “shortcut” that users can use to get back to previously-visited pages:

![Breadcrumb Path](image)

2.3.5 Button Meanings

Users will encounter many action buttons throughout the WebOPSS system. While some buttons are area-specific depending on where the user is in the system, there are several common buttons that they will encounter:

- **Add**: this option allows the user to add a new item to a page/table.
- **Edit**: this option allows the user to edit, or change, an existing item or data in a page/table.
- **Delete**: this option allows users to permanently remove an existing item or data in a page/table.
- **Export**: this option allows users to access a table’s contents in a non-web-related manner, such as in a spreadsheet using Microsoft Excel or in a document using Microsoft Word. Once accessed, the data can be printed or saved to a specific location on the user’s local computer.
- **Back**: this option allows users to return to the previous screen viewed or the main “home” page for the selected area.
- **Save**: this option allows users to save any data that has been entered or modified in a form or table.

In addition to action buttons, users also encounter a number of user interface widgets that require user input. There are several common interface items in WebOPSS:

- **Radio Buttons**: these appear as small, round circles next to a text option. These are designed so that users may only select one option out of the list available:
• **Check Boxes**: these appear as small, square boxes next to a text option. These are designed so that users may select several options out of the list available:

![Check Boxes](image)

**Figure 2.8: Check Boxes**

• **Dropdown Lists**: these appear as rectangular boxes with an arrow at one end. When users click the arrow, the dropdown menu extends to display the options available:

![Dropdown List](image)

**Figure 2.9: Dropdown List**

• **Regular Text Fields**: these appear as rectangular boxes of varying sizes that users can enter editable text into. When users click inside the box, a blinking cursor appears and text can be entered:

![Text Field](image)

**Figure 2.10: Text Field**

**NOTE**: Red asterisks behind any text field in WebOPSS indicates that the field is a required field (as shown in the figure above). Required fields must have data entered in them before the user is allowed to Save or move on to another page.

### 2.3.6 Using the Search Filter

One of the common actions that WebOPSS users will encounter is searching for an item. In most of the WebOPSS search filters throughout the system, users can not only enter specific information to search for, but can also select a button at the top of most table columns to select the search parameters.
To Select the Search Criteria:

1. Click the button at the top of the table column (usually either 'Equal' or 'Not Equal'). The search criteria drop-down list appears:

   ![Figure 2.11: Select Search Criteria](image)

   **Figure 2.11: Select Search Criteria**

2. Select one of the following search criteria:
   - **Equals (==)**: this means that the filter will search for all entries containing only the search text.
   - **Starts With (**): this means that the filter will search for all entries that start with the search text.
   - **Ends With (**): this means that the filter will search for all entries that end with the search text.
   - **Contains (**): this means that the filter will search for all entries that contain all or part of the search text.

To Enter Search Text:

1. Double-click in the blank area to the right of the search criteria button, once the desired search criteria is selected:
2. Enter the search text in any of the search fields above a column, and press **Enter** on the computer keyboard. The search results appear in the table below the search field.

**HINT:** While viewing table information, the first click on any column heading displays the records in ascending (0-9, A-Z) order and the second click on any column heading reverses the order (Z-A, 9-0).

### 2.3.7 Context-Sensitive Help (CSH)

To provide users with immediate help while using WebOPSS, context-sensitive help is provided. Using CSH allows users to get immediate help without having to take the time to hunt through a 100+ page manual to find the applicable information. No matter where users are in the system, the **Help** hyperlink always exists in the upper right corner of the content area:

By clicking on the **Help** hyperlink, users are instantly able to access context-sensitive information relating to the area of WebOPSS that is being currently accessed:
For example, if users are working in the Operator—Address area of WebOPSS and wish for instant information on how to add an Address, they can click the CSH Help link and the CSH opens to the Operator—Address information without any other navigation required by the users.

2.4 System Timeout

The current WebOPSS timeout setting is approximately 90 minutes. If a user is inactive within WebOPSS for a period of time, the first thing to do prior to resuming work is refresh (F5). This will prevent the loss of any data prior to the next action, which will trigger a Timeout message. It is recommended that users save their work at regular intervals, prior to any periods of inactivity and prior to stepping away from their workstation.

2.5 Maximizing the Workspace

You can maximize the content area by minimizing the header and left navigation. Though this will hide both of these, they may be redisplayed at any time. Once hidden, they will remain so for the remainder of the session or until the user chooses otherwise.

To Hide the Left Navigation:

- To hide the left navigation, click the arrow icon ( ) at the top of the left navigation area.
To Display the Left Navigation:
- To display the left navigation, click the arrow icon (↑) at the top left corner of the page.

2.6 Logging Out
To logout, click the Logout tab in the left navigation area.

2.7 WebOPSS Technical Support
If you have questions or require assistance with WebOPSS, technical support is available. For phone help, call (877) 287-6731. To email WebOPSS Technical Support, contact AFS-WebOPSS@faa.gov.

3. Inbox
The WebOPSS system introduces the concept of an Inbox similar to the physical inbox that sits on one’s work desk. The WebOPSS Inbox stores and lists all notifications that a user has been sent in the form of discussions, messages, and tasks assigned to the user. It also stores the user’s draft proposals prior to submission. Notifications in the WebOPSS Inbox system can also include system-wide messages to inform the user community of an upcoming system upgrade, policy change, or any other general FAA information.

The new features used to enhance two-way communication between the program office, field, and industry users are:
- Summary (will contain Discussions, proposal Drafts, Messages, and Tasks)
- Tasks
- Messages
- Discussions (or Forums)
- Drafts
3.1 WebOPSS Home Tasks

Upon login, the WebOPSS Home page will display any available new task information, including all tasks and messages received, with icons indicating the different status of the item (i.e., the icon for a completed task will be different from that of a new message):

The list that may appear immediately upon login contains the same information that can be accessed by clicking on Summary from the navigation bar (see below). This information will remain accessible at any time during the user’s WebOPSS session by clicking on the Home link in the breadcrumb path.

There are five icons that may appear in the tables for user Summary, Tasks, and Messages:

- 💌: the plain envelope icon indicates a Message that has already been read.
- 💌✨: the envelope with a star icon indicates a new Message.
- 📋: the clipboard with a star icon indicates a new Task.
- 📋: the plain clipboard icon indicates a Task that has already been viewed but not completed.
- 📋✅: the clipboard with a checkmark icon indicates a completed Task.

3.2 Summary

Different screens will display depending on the type of item the user wishes to view. For more information, refer to the corresponding sections below.
To View a Summary of Messages and Tasks:

1. In the left navigation area, under *Inbox*, click **Summary**. The Summary page appears:

   ![Figure 3.2: Summary Table]

<table>
<thead>
<tr>
<th>From/Assigned By</th>
<th>Subject: Exported documents are ready for download</th>
<th>Sent/Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>developer, developer</td>
<td>6/6/2008 2:45:02 PM</td>
<td></td>
</tr>
<tr>
<td>Test (Actual), Test</td>
<td>6/5/2008 2:02:33 PM</td>
<td></td>
</tr>
<tr>
<td>developer, developer</td>
<td>3/5/2008 11:59:57 AM</td>
<td></td>
</tr>
</tbody>
</table>

   Total: 5

2. To view a particular message, click the text of the desired message in either the **Subject** column or the **From/Assigned By** column.

3. To view additional details for a Task, click on the row of the task. Task details appear to the right of the Summary table:

   ![Figure 3.3: Task Details]

   **Subject:** Accept/Reject new authorizing document
   "This paragraph is designed to test the text processing character limitation of a segment with the WEBOPSS Infrastructure. It will test wrap around capability, word containment, logic, functionality. This paragraph contains 250 number of characters."

   **Priority:** Normal
   **Status:** Complete
   **Assigned:** Logan, Cindy
   **By:**
   **Date:** 07/25/2008
   **Due Date:**
NOTE: Task details can also be viewed from the WebOPSS Home page summary table.

3.3 Tasks

Workflow is the implementation, by the system, of the business rules established by the HQ user. WebOPSS supports workflow around new policy and authorizing document processes. Automated workflow can generate tasks for system users, improving the integration of inter- and intra-organizational communication and tasking.

To Accept or Reject a Received Task:
1. In the left navigation area, under Inbox, click Tasks. The Task Management page appears:

<table>
<thead>
<tr>
<th>Subject</th>
<th>Due Date</th>
<th>Assigned By</th>
<th>Created Date</th>
</tr>
</thead>
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<tr>
<td>Accept/Reject new authorizing document: This paragraph is designed to test the text processing character limitation of a segment with the WEBOPSS infrastructure. It will test wrap around capability, word containment, logic, functionality. This paragraph contains 250 number of characters.</td>
<td>-</td>
<td>Logan, Cindy</td>
<td>4/22/2008 2:55:46 PM</td>
</tr>
<tr>
<td>Accept/Reject new authorizing document: This paragraph is designed to test the text processing character limitation of a segment with the WEBOPSS infrastructure. It will test wrap around capability, word containment, logic, functionality. This paragraph contains 250 number of characters.</td>
<td>-</td>
<td>Logan, Cindy</td>
<td>4/22/2008 2:37:09 PM</td>
</tr>
<tr>
<td>Accept/Reject new authorizing document: This is a test......</td>
<td>-</td>
<td>Logan, Cindy</td>
<td>3/6/2008 1:20:10 PM</td>
</tr>
<tr>
<td>Accept/Reject new authorizing document: This is a test.</td>
<td>-</td>
<td>Logan, Cindy</td>
<td>2/4/2008 1:40:19 PM</td>
</tr>
<tr>
<td>Accept/Reject new authorizing document:</td>
<td>-</td>
<td>Ingle, Steven</td>
<td>12/18/2007 3:15:11 PM</td>
</tr>
</tbody>
</table>

Figure 3.4: Task Management Table

2. Click the text of the Subject of the desired task.
3. If the task has been completed, the Poll screen will appear displaying the voting results:

Poll

As a member of the working group, should we approve this Proposal?

| Yes | 1 |
| No | 0 |

Figure 3.5: Poll Results for a Completed Task
4. If the task has not been completed (i.e., it is a new or previously-viewed task), the Poll screen will appear displaying the option to vote on the task:

![Poll Screen Image]

Figure 3.6: Vote on a New or Previously-viewed Task

5. To vote on the task, do the following:
   a. Select Yes or No.
   b. If desired, enter any comments in the Comments text field.

   **NOTE:** Comments are mandatory for a negative response.

6. Click Vote. The Poll results are displayed with options to either go Back, to change the vote, or Continue to the rest of the Task workflow.

7. To view the Task Workflow, click Continue. The Command Control screen appears:
To Add a Task:
1. In the left navigation area, under Inbox, click Tasks. The Task Management page appears.
3. To autopopulate the recipient’s name, click To. The Directory/Address Book form appears:
NOTE: There are two tabs available for search in this window.

4. Do one of the following:
   - Use the Internal tab to select the recipient if the recipient is an internal member of the FAA.
   - Use the Email tab to enter the recipient’s email address if there is an external address for the recipient.

HINT: The Directory/Address Book automatically defaults to show the Internal tab upon initial access.

5. If using the Internal tab, select the recipient and click To, Cc, or Bcc, as desired.
6. If using the Email tab, enter the recipient email and click To, Cc, or Bcc, as desired.
7. Click OK. The recipient will appear in the list of recipients.
8. Enter the topic of the message in the Subject text box.
9. Enter the body of the message in the large text box.
10. Click Assign.
3.4 Messages

This folder contains typical email messages. Users can add and send a message or view received messages.

To View Received Messages:
1. In the left navigation area, under Inbox, click Messages. The Messages page appears:

![Messages Table]

Figure 3.9: Messages Table

2. To view a particular message, click the text of the desired message in either the Subject column or the From column.

To Add and Send a Message:
1. In the left navigation area, under Inbox, click Messages. The Messages page appears.
2. To add and send a message, click New. The New Message form appears:
3. To autopopulate the recipient’s name, click To. The New Message screen changes and a Directory/Address Book table appears:
NOTE: There are two tabs available for search in this window.

4. Do one of the following:
   • Use the Internal tab to select the recipient if the recipient is an internal member of
     the FAA.
   • Use the Email tab to enter the recipient’s email address if there is an external
     address for the recipient.

HINT: The Directory/Address Book automatically defaults to show the Internal tab upon
initial access.

5. If using the Internal tab, select the recipient and click To, Cc, or Bcc, as desired.
6. If using the Email tab, enter the recipient email and click To, Cc, or Bcc, as desired.
7. Click OK. The recipient will appear in the list of recipients.
8. Enter the topic of the message in the Subject text box.
9. Enter the body of the message in the large text box.
10. Click Send.
3.5 Discussions

One of the main collaborative tools in WebOPSS is its forums. The forums provide a web-based discussion area for associated FAA documents. In the WebOPSS forums, users can submit topics for discussions, or “threads,” and communicate with other users using publicly visible messages, or “posts.” Posts can consist of text messages, online polls that allow other users to vote on any desired issue, or a combination of both. The WebOPSS forum supports the following functionality:

- Threaded discussions
- Thread-level group association and security
- Post editor including inline formatting, quoting, image & link support, and integrated spell-check
- Integrated polling
- Workflow integration

The main form displays all the root threads representing the main WebOPSS categories/topics. Only applicable topics, as determined by the user’s security and group membership, are displayed. The topic names offer a drill-down to the respective thread. The topics are highlighted to indicate new/unread posts.

The basic thread display shows the initial posts and subsequent responses in date order. Responses are entered by selecting a post and clicking the Reply or Quote button which in turn displays the Posting screen.

To Add a New Thread:
1. In the left navigation area, under Inbox, click Discussions. The Forums table appears:
2. To view a particular topic, click the text of the desired **Topic**. The various threads for that topic are displayed.
3. Click **New Thread**. The Discussions page opens:
4. Enter the thread **Subject** in the text field.
5. Enter the thread message in the **Body** text field.
6. If desired, to create a poll associated with the thread do the following:
   a. Click on the “**Poll**” header. The Poll form appears:
   
   ![Poll Form](image)

   Figure 3.14: Create a Thread Poll

   b. Enter the question in the **Question** text field.
   c. Enter the desired answer options in each **Option** text field.
   d. If desired, check the “**Can Change Votes**” box.

   **HINT:** The “**Can Change Votes**” box allows users to change their votes after they have placed them. If the box is left unchecked (default), the users’ votes will be final once they are submitted.

   e. Enter the maximum number of votes to allow in the **Maximum Votes** text field.
7. Click **Save**. The new thread is displayed:
8. If a poll was added, the poll appears above the new thread:

**Figure 3.16: New Poll**

**HINT:** To return to the last Topic table, click the Back button. To return to the Forums page, use the breadcrumb at the top of the page or the navigation path on the left.

**To Edit a Thread:**

**NOTE:** A thread can only be edited by the thread author. The Edit button will not be enabled for all other users.

1. In the left navigation area, under Inbox, click Discussions. The Forums table appears.
2. Under the Subject column, click the text of the desired thread title. The thread post appears along with any posted replies (signified by indented and darkened boxes).
3. Click Edit. The Discussions page appears.
4. Make the appropriate changes.
5. Click Save.

**To Vote on a Thread Poll:**

1. In the left navigation area, under Inbox, click Discussions. The Forums table appears.
2. Click the text of the desired Topic. The various threads for that topic are displayed.
3. Under the Subject column, click the text of the desired poll title. The thread poll appears:
4. Select the desired answer.
5. Click **Vote**. The Poll results appear listing all of the poll replies, to date.
6. If desired, click **Change Vote** to change the vote tallied.

**NOTE:** The **Change Vote** button will only be available if the poll was created with the option “Can Change Votes.”

**To Drill-down and Respond to a Particular Thread:**

1. In the left navigation area, under **Inbox**, click **Discussions**. The Forums table appears.
2. To view a particular topic, click the text of the desired **Topic**. The various threads for that topic are displayed.
3. Under the **Subject** column, click the text of the desired thread title. The thread post appears along with any posted replies (signified by indented and darkened boxes):

**HINT:** Both **Reply** and **Quote** can be used to respond to a thread. **Reply** allows the user to simply respond with personal input. **Quote** references a direct quote from the previous post without the user having to retype it.
5. Enter the thread **Subject** in the text field.
6. Enter the thread message in the **Body** text field.
7. Click **Save**. The new reply is displayed.

**To Subscribe/Unsubscribe from a Thread:**
1. In the left navigation area, under **Inbox**, click **Discussions**. The Forums table appears.
2. Click the text of the desired **Topic** to subscribe to/unsubscribe from. The various threads for that topic are displayed.
3. Under the **Subject** column, click the text of the desired thread title. The thread post appears along with any posted replies (signified by indented and darkened boxes).
4. Click the **Subscribe** or **Unsubscribe** button:

![Figure 3.19: Subscribe/Unsubscribe to a Thread](image)

**HINT:** The button will change from “Subscribe” to “Unsubscribe” depending on the user’s subscription status. If the user has not previously subscribed to the thread, the **Subscribe** button appears. If the user has already subscribed to that thread, the **Unsubscribe** button appears.

### 3.6 Drafts

Any authorized user is able to submit a proposal via the WebOPSS system. At any time, a user can save a draft of the proposal being worked on; this saved draft then becomes stored under **Drafts** in the particular user’s Inbox.

**To Create a Proposal Draft:**
1. In the left navigation area, under **Inbox**, click **Drafts**. The Drafts page appears:
2. Click the text of the desired proposal draft under the **Type** column. The Submit Proposal page appears.

For more information on how to create a new proposal, see “6.1 Template Proposals” on page 136.

### 4. Data Management

#### 4.1 Operators

Users with the appropriate roles and permissions can manage operator data. This information is accessed through the **Maintain** and **My Operators** subheadings.

##### 4.1.1 Maintain Operators

Within WebOPSS, users will go to the **Operators > Maintain** area to view a certificate for any operator assigned to their offices. Non-field users will be shown a list of all the operators associated with their assigned regional offices. However, for field users the system displays the operators assigned to the login user.

The **Maintain Operators** area in WebOPSS is where the bulk of operator management will probably take place. It is the area for more common tasks, such as adding and editing operators and related information. Additionally, authorized users can also deleting test operators within the authorized user’s CHDO and view the historical information of operators from the database.
To Add an Operator:
1. In the left navigation area, CHDO > Operators, click Maintain. The Operator—Maintain table appears:

![Maintain Operators Table](image)

**Figure 4.1: Maintain Operators Table**

2. Click Add. The Add Operator wizard appears:

![Add Operator—General Data](image)

**Figure 4.2: Add Operator—General Data**

3. In the Name text box, insert the name of the new operator.
4. Select the **Type** of user from the drop-down menu.

5. Select the operator’s **Certificate Status** from the drop-down menu.

6. In the **Effective Date** field, click in the text field to choose a date from the calendar that appears.

7. Select the operator’s **Office Code** from the drop-down menu.

8. Click **Next**. The **Designator Code** section appears:

9. Select the **CFR** from the drop-down menu.

10. In the **First three characters of the Designator Code** text field, enter the appropriate information. The letters will appear in the **Designator Code** section on the last field as they are typed.

11. Select the **Last character of the Designator Code** from the drop-down menu. This letter will also appear at the end of the **Designator Code** on the last field.

12. Click **Next**. The **Certificate Number** section appears.

13. Enter the **Last four characters of Certificate Number** in the text field. These numbers will appear in the **Certificate Number** field below as they are typed.

14. Click **Finish**. The Edit Operator screen appears:
15. Click **Save** to return to the Operator—Maintain table.

**To Open an Operator:**
1. In the left navigation area, under **CHDO > Operators**, click **Maintain**. The Operator—Maintain table appears.
2. Select the desired row.
3. Click **Open**. The Authorizing Documents screen appears under the selected operator.

**HINT:** For more information on authorizing documents, see “5 Authorizing Documents Management” chapter on page 103.
To Edit Operator Information:
1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Maintain table appears.
2. Select an operator from the operator list.
3. Click Edit. The Edit Operator form appears.
4. Modify the operator properties as needed.

**NOTE:** The information in the “Designator Code” section cannot be changed.

5. When finished, click Save to return to the Operator—Maintain table.

To Merge Operators:

**NOTE:** When users merge operators, selected data from each is assimilated from one "Source" operator to a different "Destination" operator. Merge functionality is permission-based, so if a user does not have permission for this action, the Merge button will not be available.

Because merge functionality can be complex and may have some data-specific actions, example scenarios are presented for each data row (e.g., Addresses, Aircraft, DBAs, etc.) below.

1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Data table appears.
2. Select an operator from the operator list.

**HINT:** The selected operator will be used as the Source Designator. If users do not first select an operator from the operator list and instead simply click Merge, they will have to input a valid designator code in the Source Designator text field. If an operator is selected from the operator list first, the Source Designator CFR and Name data will preload on the Merge Operators page, which indicates that a valid operator was entered.

3. Click Merge. The Merge Operators page appears:
4. Enter the **Destination Designator** code in the text field.

**HINT**: Only two different operators that have the same CFR can merge data.

5. As desired, do any of the following to select the desired **Source** or **Destination** radio buttons next to the appropriate data row:
NOTE: Only one radio button per row can be selected at a time. The Do Not Merge option is chosen for all data rows by default. When users select Do Not Merge for a data row, the system does not change that data for either the source or the destination—that data stays the same as it was before the merge.

Whether users merge by selecting Source or by selecting Destination, the functionality of the merge action will always happen from source to destination. No changes will ever occur for the source data; only the destination data will change.

If the Source radio button is selected to merge, and there is data in the Source that does not exist under the Destination operator, then the Source data will be copied over to Destination. If Destination has data that does not exist under Source, then nothing happens to the Destination data. If a conflict exists, then the Source information will overwrite the Destination information.

If the Destination radio button is selected, and an element in it (e.g., an Address Type under the “Addresses” data row) exists under Source but does not exist under Destination, then the Source data is copied over to Destination. If the Destination has an element that does not exist under Source then nothing happens to the Destination element. If a conflict exists for an element (e.g., for “Addresses,” the Address Type “Primary” exists for both Source and Destination, but the Primary Address is different for both), then the Destination address is not overwritten by the Source address.

• Select an option for Addresses.
**HINT**: The basic functionality of the Addresses merger is that if Source and Destination addresses have the same **Address Type**, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

**Example Scenario:**
The Source has Primary (Different than Destination), Within US, and Training. The Destination has Primary and Agent for Service.

**If Source were selected:**
After the merge, Destination will have the following: Primary (copied over from Source), Within the US (copied over from Source), Training (copied over from Source), and Agent for Service (left over from Destination and is not deleted).

**If Destination were selected:**
After the merge, Destination will have the following: Primary (not copied over from Source), Within the US (copied over from Source), Training (copied over from Source), and Agent for Service (left over from Destination and is not deleted).

- Select an option for **Airworthiness Directive Notifications**.
**HINT**: The basic functionality of the AD Notification merger is that if Source and Destination have the same *International/Domestic* addresses, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same. If Courtesy Copy (Cc) for Source and Destination have the same *Person/Organization Name*, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

For the AD Notification Addresses functionality, if Source and Destination have the same *Primary Address*, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same. Likewise, if the Source and Destination *Alternate Addresses* are the same, the Source data will overwrite the Destination data.

**Example Scenario:**
The user attempts to merge the AD Notification addresses of two operators that have different Courtesy Copy (Cc) Person/Organization name listed. The Source has Jeremy, Stephen, and Cindy. The Destination has Jeremy and Brittany.

**If Source were selected:**
After the merge, Destination will have the following: Jeremy (*not* copied over from Source), Stephen (copied over from Source), Cindy (copied over from Source), and Brittany (left over from Destination and is not deleted).

- Select an option for *Aircraft*. 
**HINT:** The basic functionality of the Aircraft merger is that if Source and Destination aircraft have the same **Registration Number**, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

**Example Scenario:**

**If Source were selected:**
Since the registration numbers are the same, the Source Aircraft will overwrite the Destination aircraft. One way to test that Destination aircraft was overwritten is to set both aircrafts with different Type Sec 119, Aircraft Seats, Kind of Operation, etc.

**If Destination were selected:**
The Source aircraft is not copied over to Destination; the Destination data remains the same.

- Select an option for **Airports**.
**HINT**: The basic functionality of the Airports merger is that if Source and Destination airports have the same **Assigned Airports**, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

**Example Scenario:**
The user attempts to merge the Assigned Airports lists of two operators. The Source has Acapulco (with different Airport Authorizations, Provisional Airports, and Runway Categories than Destination), Kansas City International, and Johannesburg International. The Destination has Acapulco and St. Croix/Henry E. Rohlsen. (The Available Airports list will always be the same, regardless of the Source or Destination operator.)

**If Source were selected:**
After the merge, Destination will have the following: Acapulco (copied over from Source), Kansas City International (copied over from Source), Johannesburg International (copied over from Source), and St. Croix/Henry E. Rohlsen (left over from Destination and is not deleted).

**If Destination were selected:**
After the merge, Destination will have the following: Acapulco (not copied over from Source), Kansas City International (copied over from Source), Johannesburg International (copied over from Source), and St. Croix/Henry E. Rohlsen (left over from Destination and is not deleted).

- Select an option for **Authorized Areas**.

**HINT**: The basic functionality of the Authorized Areas merger is that if Source and Destination authorized areas have the same **Area**, **Notes**, and **Reference Documents**, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

Select an option for **Deviations**.
HINT: The basic functionality of the Deviations merger is that if Source and Destination deviations have the same Deviation Authorities and Deviation Froms, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

Example Scenario:
The user attempts to merge the Assigned Deviations lists of two operators. The Source has Deviation Authority “119.67(e)” / Deviation From “119.67(a)(1),” Deviation Authority “119.3” / Deviation From “119.21(a)(1),” and Deviation Authority “121.339(a)” / Deviation From “121.339(c).” The Destination has Deviation Authority “119.67(e)” / Deviation From “119.67(a)(1) and Deviation Authority “121.310(f)(3)(iv)” / Deviation From “121.310(f)(3)(iii).” (The Available Deviations list will always be the same, regardless of the Source or Destination operator.)

If Source were selected:
After the merge, Destination will have the following: Deviation Authority “119.67(e)” / Deviation From “119.67(a)(1)” (copied over from Source), Deviation Authority “119.3” / Deviation From “119.21(a)(1)” (copied over from Source), Deviation Authority “121.339(a)” / Deviation From “121.339(c)” (copied over from Source), and Deviation Authority “121.310(f)(3)(iv)” / Deviation From “121.310(f)(3)(iii)” (left over from Destination and is not deleted).

If Destination were selected:
After the merge, Destination will have the following: Deviation Authority “119.67(e)” / Deviation From “119.67(a)(1)” (not copied over from Source), Deviation Authority “119.3” / Deviation From “119.21(a)(1)” (copied over from Source), Deviation Authority “121.339(a)” / Deviation From “121.339(c)” (copied over from Source), and Deviation Authority “121.310(f)(3)(iv)” / Deviation From “121.310(f)(3)(iii)” (left over from Destination and is not deleted).

- Select an option for Exemptions.
**HINT:** The basic functionality of the Exemptions merger is that if Source and Destination exemptions have the same *Exemption Number* assigned, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

**Example Scenario:**
The user attempts to merge the Assigned Exemptions lists of two operators. The Source has Exemption Numbers 5318, 396, and 444. The Destination has Exemption Numbers 5318 and 7020.” (The Available Exemptions list will always be the same, regardless of the Source or Destination operator.)

**If Source were selected:**
After the merge, Destination will have the following: Exemption No. 5318 (copied over from Source, including Remarks), Exemption No. 396 (copied over from Source), Exemption No. 444 (copied over from Source), and Exemption No. 7020 (left over from Destination and is not deleted).

**If Destination were selected:**
After the merge, Destination will have the following: Exemption No. 5318 (not copied over from Source), Exemption No. 396 (copied over from Source), Exemption No. 444 (copied over from Source), and Exemption No. 7020 (left over from Destination and is not deleted).

- Select an option for **Personnel**.
**HINT:** The basic functionality of the Personnel merger is that if Source and Destination airports have the same Agent of Service, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

For personnel that are not Agents of Service, if Source and Destination have personnel with same First Name, Last Name, and FAA Recognized Title, but have different Authorization to Sign Part(s) [X], then the Source personnel will overwrite Destination designator.

**Example Scenario:**
The Source has Jeremy Smith (Agent for Service, Authorized to sign Parts A, C, and D), Robin Akers (Chief Pilot, Authorized to sign for Part Z), and Todd Richards (Dr. of Safety, Authorized to sign for Parts A, B, C, and E). The Destination has Jeremy Smith (Agent for Service, Authorized to sign Parts B, C, and E) and Cindy Beech (Chief Pilot, Authorized to sign for Parts D and T).

**If Source were selected:**
After the merge, Destination will have the following: Jeremy Smith (copied over from Source), Robin Akers (copied over from Source), Todd Richards (copied over from Source), and Cindy Beech (left over from Destination and is not deleted).

**If Destination were selected:**
After the merge, Destination will have the following: Jeremy Smith (not copied over from Source), Robin Akers (copied over from Source), Todd Richards (copied over from Source), and Cindy Beech (left over from Destination and is not deleted).

- Select an option for DBAs.
**HINT:** The basic functionality of the DBAs merger is that if Source and Destination DBAs have the same **Name**, then Source data will overwrite Destination data when Source is selected; likewise, when Destination is selected, the Destination data will remain the same.

**Example Scenario:**
The Source has Delta, Anthony, and Northwest Airlines. The Destination has Delta and Virgin America.

**If Source were selected:**
After the merge, Destination will have the following: Delta *(not copied over from Source)*, Anthony *(copied over from Source)*, Northwest Airlines *(copied over from Source)*, and Virgin America *(left over from Destination and is not deleted).*

For the DBA merger only, the system only has one field to check. As a result, because a **Destination** radio button would be redundant in this case, it has been disabled.

- Select an option for **Authorizing Documents**.
**HINT:** The basic functionality of the Authorizing Documents merger is that a number of factors must be identical between Source and Destination for an authorizing documents merge: **Total Documents, Part/Para, Status, Type, Available Rev., Workspace Rev., Issued Rev., Title, Always Authorized, Control and Expiration Dates**, and **Last Modified By**. All “Draft” and “Draft in Processes” documents are copied over from Source to Destination; Industry Signed, FAA Signed, and Ind. & FAA Signed docs are not copied over to Destination. All Source compliance date documents are copied over to Destination.

**Example Scenario:**
The user attempts to merge the authorizing documents of two operators. The Source has A001 Copy 31, A001 Copy 32, and A001 Copy 33. The Destination has A001 documents up to Copy 41.

**If Source were selected:**
After the merge, the Destination will have the following: A001 Copy 29 (from Source) will become Copy 42 (the highest Destination Copy number + 1), A001 Copy 30 (from Source) will become Copy 43, and A001 Copy 31 (from Source) will become Copy 44.

Merging Authorizing Documents for Source first clears the **Workspace** and then copies over the Source documents; this means that Source data always overwrites Destination data. As a result, the **Destination** radio button has been disabled.

---

6. Click **Save**. A confirmation box appears.
7. Click **Yes**. Once the merge has successfully completed, a confirmation message, titled “Merge Operator Data,” will appear under the **Inbox > Messages** path in the left navigation area.

**To Delete an Operator:**
1. In the left navigation area, under **CHDO > Operators**, click **Maintain**. The Operator—Data table appears.
2. Select an operator from the operator list.
3. If deleting a test operator, do the following:
   
   **HINT:** It may help to first search for “test” under the **Type** column to find all test operators.
   
   a. Select the row of the desired test operator.
   b. Click **Delete**. A confirmation box appears.
4. If deleting a real operator, do the following:
**HINT:** It may help to first search for “real” under the **Type** column to find all real operators.

a. Select the row of the desired real operator.
b. Click **Delete**. A confirmation box appears:

![Figure 4.6: Delete a Real Operator](image)

5. Click **Yes**. The operator is removed from the Operator—Data table.

---

**NOTE:** The checkbox next to “**Don’t preserve issued and archived authorizing documents**” allows the user to perform either a “hard delete” or “soft delete.”

A hard delete is performed when the box is checked. With a hard delete, **1) all users and inspectors are disassociated from the operator (though no logins will be deleted), 2) the designator can be reused for a new operator, and 3) the operator is removed from all CHDO Operator and Inspector/ASA Maintenance pages, and 4) all documents and operator data are permanently removed from the system. Hard deletes are most commonly used in cases where an operator was created by mistake.**

A soft delete is performed when the box is not checked. With a soft delete, **1) all users and inspectors are disassociated from the operator (though no logins will be deleted), 2) the designator can be reused for a new operator, and 3) the operator is removed from all CHDO Operator and Inspector/ASA Maintenance pages, 4) the operator’s certificate status is changed to “Deleted,” 5) all of the operator’s Issued documents are moved to Archive and will be accessible via reporting tools, and 6) all of the operator’s data is permanently removed from the system. Soft deletes are most commonly used when an operator is no longer in business for a given period.**
To View Operator History:

1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Maintain table appears.
2. Select the desired operator from the operator list.
3. Click History. The History table appears:

4. To export operator historical data, do the following:
   a. Click Export Grid. The File Download box appears.
   b. To open a Microsoft Excel file containing all of the operator history data, click Open.
   c. To choose a file location on a local computer in order to open the Excel file containing all of the operator history data later, click Save.
5. Click Back to return to the Operator–Maintain table.

To Export Operator Data:

1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Maintain table appears.
2. Click Export Grid. The File Download box appears.
3. To open a Microsoft Excel file containing all of the operator history data, click Open.
4. To choose a file location on a local computer to open the Excel file containing all of the operator history data later, click Save.
To Add to My Operators:

**HINT:** For more information on My Operators, see “4.1.2 My Operators” section below.

1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Maintain table appears.
2. Select the desired row.
3. Click **Add to My Operators**. A confirmation message appears at the top of the Operator—Maintain screen:

![Figure 4.8: Add to My Operators](image)

To View an Operator’s Principle Inspectors:

1. In the left navigation area, under CHDO > Operators, click Maintain. The Operator—Maintain table appears.
2. Select the desired row.
3. Click **Inspectors**. The Principal Inspectors page appears:
**HINT:** The Principal Inspectors page is designed in an invisible table format with “rows” and “columns:” each “row” shows the type of inspector available for the selected operator. The two “columns,” indicate whether or not an inspector is assigned to the listed inspector types. If no inspector is currently assigned, the **Maintain Inspectors** button appears, in the first “column,” next to the unassigned inspector types. If an inspector is currently assigned, the inspector’s name and inspector code is listed and the **Reassign** button appears, in the second “column,” next to the assigned inspector type.

4. To assign a new inspector, click **Maintain Inspectors** next to the desired inspector type. The Inspectors page appears.
5. To reassign an existing inspector, click **Reassign** next to the desired inspector name. The Reassign Inspectors page appears.
6. Follow the directions listed under **To Reassign an Inspector** in the “4.3 Inspectors” chapter on page 99.
4.1.2 My Operators

WebOPSS supports the ability to help users easily gain access the operators they view most. The Operators > My Operators area displays the a user’s “Operator Top 50,” meaning that the 50 most recently accessed operators are displayed.

**NOTE:** Users can view operators here, but cannot edit their information—all operator information displayed is “Read Only.”

**To Open an Operator:**
1. In the left navigation area, under CHDO > Operators, click My Operators. The My Operators table appears:

![Figure 4.10: My Operators](image)

2. Select the desired row.
3. Click Open. The Authorizing Documents screen appears under the selected operator.

**HINT:** For more information on authorizing documents, see Chapter “5 Authorizing Documents Management” on page 103.

**To View My Operator History:**
1. In the left navigation area, under CHDO > Operators, click My Operators. The My Operators table appears.
2. Select the desired operator from the operator list.
3. Click History. The History table appears:
4. To export operator historical data, do the following:
   a. Click Export Grid. The File Download box appears.
   b. To open a Microsoft Excel file containing all of the operator history data, click Open.
   c. To choose a file location on a local computer in order to open the Excel file containing all of the operator history data later, click Save.

5. Click Back to return to the My Operators table.

To Remove an Operator from My Operators:
1. In the left navigation area, under CHDO > Operators, click My Operators. The My Operators table appears.
2. Select the desired operator from the operator list.
3. Click Remove From List. The operator is removed from the My Operators table.

To View an Operator’s Principle Inspectors:
7. In the left navigation area, under CHDO > Operators, click My Operators. The My Operators table appears.
8. Select the desired row.
9. Click Inspectors. The Principal Inspectors page appears:
**HINT:** The Principal Inspectors page is designed in an invisible table format with “rows” and “columns:” each “row” shows the type of inspector available for the selected operator. The two “columns,” indicate whether or not an inspector is assigned to the listed inspector types. If no inspector is currently assigned, the **Maintain Inspectors** button appears, in the first “column,” next to the unassigned inspector types. If an inspector is currently assigned, the inspector’s name and inspector code is listed and the **Reassign** button appears, in the second “column,” next to the assigned inspector type.

10. To assign a new inspector, click **Maintain Inspectors** next to the desired inspector type. The Inspectors page appears.
11. To reassign an existing inspector, click **Reassign** next to the desired inspector name. The Reassign Inspectors page appears.
12. Follow the directions listed under “**To Reassign an Inspector**” in the “4.3 Inspectors” chapter on page 99.
4.2 Operator Data

One of the purposes of WebOPSS is the storage and organization of operator data. While users can access and modify much of this information, some of the actions are permission-based and not available to all users. The information on the CHDO level includes addresses, aircraft, airports, authorized areas, deviations, exemptions, insurance, personnel, and DBAs. Prior to editing any data pertinent to an operator, the user needs to identify with which Operator they wish to work. An operator must be selected before a user can access operator data. Once an operator is selected, WebOPSS will display attributes for that operator (for example, Address, Aircraft, Airport) until the operator is changed. At any time, users can change the desired operator by clicking on the Change Operator hyperlink.

**NOTE:** If a user signs on as a particular operator, all CHDO information viewed will be specific to the selected operator, until either the Log In session times out—after which the user will be prompted to reselect the operator—or the user chooses to change the operator (to change operators, see “To Change an Operator” section below).

**To Select an Operator:**

1. In the left navigation area, under CHDO > Operators > Maintain Operator Data, click one of the following:
   - Addresses
   - Airworthiness Directive Notification
   - Aircraft
   - Airports
   - Authorized Areas
   - Deviations
   - Exemptions
   - Insurance
   - Personnel
   - DBAs
2. The Select an Operator table appears:
3. Select the search parameters and enter the search text in any of the search fields above the columns.
4. Click Enter.
5. Select the row of the desired operator.
6. Click Select. The page to manage the attribute (for example, Address, Aircraft, Airport) of the selected Operator appears.

To Change an Operator:
1. In the Content area, on the same line which displays the current operator, click on the Change Operator hyperlink:

   ![Change Operator Hyperlink](image)

2. Follow steps listed in “To Select an Operator” section above.

   **NOTE:** Once an operator is selected, WebOPSS will display attributes for that operator (for example, Address, Aircraft, Airport) until the operator is changed.

### 4.2.1 Addresses

Anyone who has the permission to add, edit, or delete an operator’s address may do so.
To Add an Operator Address:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Addresses. The Operator—Addresses page appears:

![Image of Operator Addresses](image)

Figure 4.15: Operator Addresses

2. Click Add. The Add Address form appears:

![Image of Add Address](image)

Figure 4.16: Add Operator Address

3. Enter the appropriate address information.
4. Click **Save**. The Operator Addresses table changes to reflect the addition.

**To Edit an Operator Address:**

**NOTE:** When the screen appears, the **Edit**, **Delete**, and **Copy** buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Addresses**. The Operator—Addresses page appears.
2. Select the row of the desired operator address.
3. Click **Edit**. The Edit Address form appears.
4. Enter the desired address information.
5. Click **Save**. The Operator—Addresses table appears with a list of all addresses in the database for the selected operator.

**To Delete an Operator Address:**

**NOTE:** When the screen appears, the **Edit**, **Delete**, and **Copy** buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Addresses**. The Operator—Addresses page appears.
2. Select the row of the desired operator address.
3. Click **Delete**. A confirmation window appears.
4. Click **Yes**. The address is removed from the Operator—Addresses table.

**To Copy an Operator Address:**

**NOTE:** When the screen appears, the **Edit**, **Delete**, and **Copy** buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Addresses**. The Operator—Addresses page appears.
2. Select the row of the desired operator address.
3. Click **Copy**. The screen will update itself to automatically open the copied address.
4. Select the new **Address Type**.
5. Click **Save**. The Operator-Addresses table changes to reflect the addition.

**4.2.2 Airworthiness Directive Notification (AD Notification)**

WebOPSS supports the ability to add, edit, or delete airworthiness directive notifications. Users may also add and modify AD notification addresses associated with the notifications.
To Add an AD Notification:

1. In the left navigation area, under CHDO > Maintain Operator Data, click Airworthiness Directive Notification. The AD Notification page appears:

![Airworthiness Directive Notification](image1)

2. Click Add. The Add Airworthiness Directive Notification form appears:

![Add Airworthiness Directive Notification](image2)
3. Select the circle indicating that the party is either the “Responsible Party” or a “Courtesy Copy.”
4. Enter the name and contact information for the Responsible Party.

**HINT:** The Person/Organization text field allows up to 65 characters.

5. If the user is located outside the United States or its holdings (for example, Puerto Rico), check the International box.
6. Enter the address information.
7. Click Save. The AD Notification table changes to reflect the addition.

**To Edit an AD Notification:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airworthiness Directive Notification. The AD Notification page appears.
2. Select the row of the desired AD Notification.

**NOTE:** When the screen appears, the Edit and Delete buttons are grayed out (inaccessible). They will become accessible once a row in the table is selected.

4. Make the appropriate changes.
5. Click Save. The AD Notification table appears with a list of all AD Notifications in the database for the selected operator.

**To Delete an AD Notification:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airworthiness Directive Notification. The AD Notification page appears.
2. Select the row of the desired AD Notification.

**NOTE:** When the screen appears, the Edit and Delete buttons are grayed out (inaccessible). They will become accessible once a row in the table is selected.

3. Click Delete. A confirmation box appears.
4. Click Yes. The notification is removed from the AD Notification table.

**To Add an AD Notification Address:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airworthiness Directive Notification. The AD Notification page appears.
2. Click Notification Addresses. The AD Notification Addresses table appears:
3. Click **Add**. The AD Notification Addresses table will change to display dropdown menus and text boxes:

![Figure 4.19: AD Notification Addresses](image)

4. Select or enter the desired information.
5. Click **Save**. The AD Notification Addresses table changes to reflect the addition.
6. To return to the AD Notification table, click **Back**.

**To Edit an AD Notification Address:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Airworthiness Directive Notification**. The AD Notification page appears.
2. Click **Notification Addresses**. The AD Notification Addresses table appears.
3. Select the row of the desired address.
4. Click **Edit**.
5. Enter the desired text in the appropriate text fields.
6. Click **Save**. The changes appear on the AD Notification Addresses table.
7. To return to the AD Notification table, click **Back**.
To Delete an AD Notification Address:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airworthiness Directive Notification. The AD Notification page appears.
2. Click Notification Addresses. The AD Notification Addresses table appears.
3. Select the row of the desired address.
4. Click Delete. A confirmation window appears.
5. Click Yes. The address is removed from the AD Notification Addresses table.
6. To return to the AD Notification table, click Back.

4.2.3 Aircraft

WebOPSS supports the ability to add, edit, delete, or export an operator’s aircraft information.

To Add an Aircraft for an Operator:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Aircraft. The Operator—Aircraft page appears:

![Operator - Aircraft](image)

Figure 4.21: Operator—Aircraft

2. Click Add. The Add Aircraft wizard appears:
3. Select the Manufacturer from the drop-down list.

**NOTE:** When the screen appears, all but one of the drop-down menus is grayed out (inaccessible). The rest of them will become accessible as valid options are selected.

4. Select the Model/Series from the drop-down list.
5. Enter the Registration Number in the text field.
6. If desired, uncheck the In Service box.

**NOTE:** The In Service box is checked by default, assuming the new aircraft is currently in use.

7. Click Next. The General form of the Add Aircraft wizard appears:
8. If desired, enter the **Nose Number** in the text field.
9. Enter the **Serial Number** in the text field.

**NOTE:** The CFR dropdown menu will default to the operator’s CFR and will be grayed out (inaccessible) for change.

10. Select the **Type Section 119** from the drop-down list.
11. Select the **Kind of Operation** from the drop-down list.
12. Select the **Configuration** from the drop-down list.

**NOTE:** When an operator selects “All Cargo” configuration, the text fields to the seat (Certificated, Demonstrated, and Installed Seats) fields on the next page may be grayed out (inaccessible). If accessible, users can enter “N/A.”

13. Under Aircraft Passenger Seats, enter the **Certificated Seats** in the text field.
**HINT: Certificated Seats** indicates the maximum number of seats as listed on the aircraft Type Certificate, not the supplemental Type Certificate; in other words, what an airplane is certified for. It is required for all air operators (i.e., 91, 91K, 121, 135, 125, 125M, 129, 129.14, 133, 137), and must be entered as any numerical value ranging 0-9,999—0 is the default value, and “N/A” is not allowed. No other seat numbers can be higher than Certificated Seats.

14. Enter the **Demonstrated Seats** in the text field.

**HINT: Demonstrated Seats** indicates the maximum number of seats demonstrated in emergency evacuation. It is only applicable to and required for Part 121, 121/135, 125 and 125M operators—for all other operators, this field will be disabled (grayed out) and defaulted to “N/A.” Demonstrated Seat values may be entered as “N/A” for Part 125 & 125M if they also have a deviation from the demonstration requirement. Additionally, if Installed/Approved Seats has selected “Cargo Only,” then Demonstrated is “N/A.” In all other cases, the Demonstrated Seat value should be entered as any numerical value ranging 0-9,999, though 0 is the default value. It can be higher than the number of Installed Seats but cannot be higher than Certificated Seats.

15. Enter the **Installed Seats** in the text field.

**HINT: Installed Seats** indicates the actual number of seats installed or approved for installation in the aircraft. It is required for 121, 125, 125M, 135, 91K operators. Installed Seat values can be entered as any numerical value ranging 0-9,999, though 0 is the default value. Installed Seats can be higher than Demonstrated Seats (if applicable) but cannot be higher than Certificated Seats.

16. Click **Next**. The Detail form of the Add Aircraft wizard appears:
17. Select the **Noise Stage** from the drop-down list.
18. Select the **Class of Operation** from the drop-down list.
19. Select the **En Route Type** from the drop-down list.
20. As needed, do any of the following:
   a. Select the **Condition** from the drop-down list.
   b. Enter the number of flight attendants in the **Flight Attendants** text field.
   c. Select the **Civil Reserve Air Fleet (CRAF)** check box.
   d. Further define the type of CRAF by selecting the **Medical** check box.
   e. Further define the type of CRAF by selecting the **Floor** check box.
   f. Further define the type of CRAF by selecting the **Door** check box.
21. Click **Next**. The Authorizations form of the Add Aircraft wizard appears:
22. In the **Authorizations** list, click on the row of the desired authorization(s) to assign to the aircraft.

**HINT:** To select multiple authorizations, use **Ctrl** and click on each one.

23. Click on the right arrow icon (>) when all authorizations have been selected. The selected authorizations appear in the right window.

24. Click **Next**. The Remarks form of the Add Aircraft wizard appears:
25. Enter any necessary **Remarks** in the text field.
26. Click **Finish**. The Operator—Aircraft table changes to reflect the addition.

**To Edit an Aircraft for an Operator:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Aircraft**. The Operator—Aircraft page appears.
2. Select the row of the desired operator aircraft.
3. Click **Edit**. The Edit Aircraft form appears:
Edit Aircraft

Record saved. Review and make changes as necessary.

Office Code: SO27 Designator: DALA Name: Delta Airlines, Inc. CFR: 121

AIRCRAFT INFORMATION

Manufacturer: Aerostar
Model/Serial: AERSTR-S46-06
Registration Number: 122453
In Service: check box

GENERAL

Note Number: 
Serial Number: h2545
CPR: 121
Type Section 119: 100
Kind of Operation: Commuter
Configuration: Restricted Category - 137

AIRCRAFT PASSENGER SEATS

Certificated Seats: 
Demonstrated Seats: 
Installed Seats: 

DETAIL

Noise Stage: bhark noise
Class of Operation: Air11
En Route Type: N/A
Condition: N/A
Flight Attendants: 

AUTHORIZATIONS

AAAP: Air Ambulance
Air Tour
CAMP

REMARKS

From Date Comment
user, test 11/12/2009 02:09 PM Tested a nov12
Whale, Hilton 11/12/2009 02:09 PM Tested a nov12

Figure 4.27: Edit Aircraft
4. Make the desired changes.
5. Click **Save**. The Operator—Aircraft screen appears with a list of all aircraft in the database for the operator.

**To Bulk Edit Aircraft:**
1. In the left navigation area, under **CHDO > Manage Operator Data**, click **Aircraft**. The Operator—Aircraft page appears.
2. Select the rows of the desired operator aircraft by holding down **Ctl** and clicking the desired rows.

   **HINT:** If no rows are specifically selected by the user, the system will assume all available aircraft are intended for bulk edit.

3. Click **Bulk Edit**. A confirmation box appears:

![Figure 4.28: Bulk Edit Confirmation Box](image)

4. Click **Yes**. The Edit Aircraft page appears:
Edit Aircraft

Office Code: S027  Designator: DALA  Name: Delta Air Lines, Inc.  CFR: 121

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Model/Series</th>
<th>Registration Number</th>
<th>Engine Type</th>
<th>In Service</th>
<th>Weight Type</th>
<th>Nose Number</th>
<th>Serial Number</th>
<th>CFR</th>
<th>Type Section 119</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boeing</td>
<td>B-737-732</td>
<td>N904DQ</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>3604</td>
<td>26683</td>
<td>121</td>
<td>119.21(a)(1) - Domes</td>
</tr>
<tr>
<td>Boeing</td>
<td>B-737-832</td>
<td>N9759D</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>3799</td>
<td>22295</td>
<td>121</td>
<td>119.21(a)(1) - Domes</td>
</tr>
<tr>
<td>Boeing</td>
<td>B-737-832</td>
<td>N980DA</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>3710</td>
<td>30256</td>
<td>121</td>
<td>119.21(a)(1) - Domes</td>
</tr>
</tbody>
</table>

Total number of aircraft selected: 3

- **AIRCRAFT INFORMATION**
  - In Service: ☐ Yes  ☐ No

- **GENERAL**
  - Type Section 119: 
  - Kind of Operation: 
  - Configuration: 

- **AIRCRAFT PASSENGER SEATS**
  - Certificated Seats: 
  - Demonstrated Seats: 
  - Installed Seats: 

- **DETAIL**
  - Noise Stage: 
  - Class of Operation: 
  - En Route Type: 
  - Condition: 
  - Flight Attendants: 
  - CRAF: Yes  ☐ No
  - Medical: ☐ ☐
  - Floor: ☐ ☐
  - Door: ☐ ☐

- **AUTHORIZATIONS**

- **REMARKS**

Figure 4.29: Bulk Edit Aircraft
5. Make the desired changes.

**NOTE:** The Manufacturer, Model/Series, Registration, Nose Number, Serial Number, and CFR fields are not editable during a bulk edit. When editing aircraft with different CFR, users will not be able to modify **Type Section 119, Kind of Operation, and Authorization**.

6. Under “Detail,” do one of the following, if applicable:

**HINT:** To select a radio button option, click the circle next to the desired option; a green dot in the circle indicates selected options. To deselect an option, click the circle again for the green dot disappears.

- If no CRAF are to be applied, click the “No” option next to CRAF.

  **HINT:** Clicking the “No” option next to CRAF selects the “No” option for all CRAF options.

- If CRAF are to be applied, select “Yes” for the desired options:

  ![Figure 4.30: Default CRAF Selection](image)

  **HINT:** Clicking “Yes” for any of the CRAF options selects the “Yes” option next to CRAF by default.

7. Under “Authorizations,” select the radio button for the desired authorization.

  **HINT:** If users leave any authorization blank (i.e., do not select either “Add” or “Remove”), no change is made to the aircraft for that authorization.

8. Click **Save**. A confirmation box appears.
9. Click **Yes**. The changes appear in the Operator—Aircraft table.

**To Delete an Operator Aircraft:**
1. In the left navigation area, under **CHDO > Manage Operator Data**, click **Aircraft**. The Operator—Aircraft page appears.
2. Select the row of the desired operator aircraft.
3. Click **Delete**. A confirmation box appears.

**NOTE:** If the deleted aircraft is the last MMS for a particular operator, the confirmation message that appears notifies the user that the MMS has Other Airport Data associated with it; if the user confirms deletion of the aircraft, the system not only deletes the aircraft, but also the authorization, runway, and any other associated data.

4. Click **Yes**. The aircraft is removed from the Operator—Aircraft table.

**To Copy an Operator Aircraft:**
1. In the left navigation area, under **CHDO > Manage Operator Data**, click **Aircraft**. The Operator—Aircraft page appears.
2. Select the row of the desired operator aircraft.
3. Do one of the following:
   - Click **Edit** to open the Edit Aircraft page, and then click **Copy** at the bottom of the form. The Copy Aircraft screen appears containing the copied aircraft information.
   - Click **Copy**. The Copy Aircraft screen appears containing the copied aircraft information.
4. Select the new **Registration Number**.

**HINT:** The registration number must be unique per operator.

5. Select the new **Serial Number**.

**HINT:** The serial number must be unique per operator by Make/Model/Series.

6. If desired, modify any other data in the appropriate fields.
7. Click **Save**. The Operator—Aircraft table changes to reflect the addition.

**To Export an Operator’s Aircraft Data:**
1. In the left navigation area, under **CHDO > Manage Operator Data**, click **Aircraft**. The Operator—Aircraft page appears.
2. Click **Export**. The File Download box appears.
3. Do one of the following:
   - Click **Open** to open a Microsoft Excel file containing all of the Aircraft list data.
   - Click **Save**. The user can save a file location on a local computer, then open the Excel file containing all of the Aircraft list data.
4.2.4 Airports

WebOPSS supports the ability for any authorized WebOPSS user to add, edit, delete, or export an operator’s airport information. When manipulating airport information, the user will see two lists: the Available Airport list and the Assigned Airport list. To assign an airport to an operator, select it, and use the arrows between the lists to move it back or forth. The user must select an airport from the Assigned Airport list to add, edit, or delete Other Airport Data.

To Add Additional Airport Data:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airports. The Operator—Airports page appears:

![Operator - Airports](image)

2. Select an operator airport from the Assigned Airports list.
3. Click Other Airport Data. The Other Airport Data page appears:
4. Click **Category and Runway**. A Category and Runway Data table appears:

![Category and Runway Data Table]

**Figure 4.33: Other Airport Data—Category and Runway Data**

**NOTE:** At least one aircraft provision must be selected on the Other Airport Data page. Otherwise the Add, Edit, and Delete buttons will appear grayed out (inaccessible).

5. Click **Add**. The Category and Runway Data table changes and aircraft options appear:
6. Click the desired aircraft in the Make/Model/Series column.
7. Select the Runway from the drop-down menu.
8. Select the Runway Category from the drop-down menu.
9. If desired, enter any Special Limitations in the text box.
10. Click Save. The Category and Runway Data table changes to reflect the addition.

To Edit Airport Aircraft:
1. In the left navigation area, under CHDO > Manage Operator Data, click Airports. The Operator—Airport page appears.
2. Select an operator airport from the Assigned Airports list.
3. Click Other Airport Data. The Other Airport Data page appears.
4. Check or uncheck the appropriate boxes to assign provisions to the desired aircraft.
5. Click Save. The changes appear on the Other Airport Data page.

HINT: Users can modify the provisions for multiple aircraft before clicking Save.

To Edit Additional Airport Data:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airports. The Operator—Airport screen appears.
2. Select an operator airport from the Assigned Airports list.
3. Click Other Airport Data. The Other Airport Data page appears.
4. Click Category and Runway. A Category and Runway Data table appears.
5. Select the data row to be edited.
6. Click Edit. The Category and Runway Data table changes and aircraft options appear.
7. Make the appropriate changes.
8. Click Save. The changes appear on the Category and Runway Data table.
To Delete Additional Airport Data:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Airports. The Operator—Airport screen appears.
2. Select an operator airport from the Assigned Airport list.
3. Click Other Airport Data. The Other Airport Data page appears.
4. Click Category and Runway. A Category and Runway Data table appears.
5. Select the data row to be deleted.
6. Click Delete. A confirmation box appears.
7. Click Yes. The airport data is removed from the Category and Runway Data table.

4.2.5 Authorized Areas

Below is a high-level graphic depicting the authorized area process.

![Authorized Area Process Diagram](image-url)
Authorized areas are comprised of reference documents and geographic locations which Headquarters compile into a general grouping that is an authorized area. The Certificate Holder then assigns and modifies the general authorized area specifically to describe its qualities in that area. WebOPSS supports the ability for any authorized user to assign or remove authorized areas and to add or delete reference documents in an operator’s list of authorized areas.

To assign an authorized area to an operator, select it from the Available Authorized Areas list and click the down arrow ( ) between the lists to move it to the Assigned Authorized Areas list. Any authorized WebOPSS user can also specify whether a territory should be included or excluded in a group, identify territories which they are allowed to fly over, select tracking categories and add, edit, delete, assign notes.

WebOPSS also allows Reference Documents to be attached to each authorized area. Whenever the user selects an authorized area from either the Available Authorized Areas or Assigned Authorized Areas lists, a list of Reference Documents associated with that authorized area appears at the bottom of the screen.

**To Add/Remove Territories:**
See “4.2.6 Territories” section on page 79.

**To Add Territory Notes:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Authorized Areas. The Operators—Authorized Areas page appears:
2. Select an authorized area from the **Assigned Authorized Areas** table.

**HINT:** If the desired authorized area is not in the **Assigned Authorized Areas** table, users may have to search for and select the desired area in the **Available Authorized Areas** table, and then click the down arrow (⬇️) to move the desired area to the **Assigned Authorized Areas** table.

3. Click **Add/Remove Territories**. The Assign Territories page appears:
NOTE: In the Notes and Reference Documents table at the bottom of the page, the default display is the Notes tab. The Reference Documents tab must be manually opened.
4. Click **Add**. The Notes and Reference Documents table changes and a notes text area appears:

![Add Authorized Area Note](image)

5. Enter the desired **Note** information in the text field.

   **NOTE:** The system automatically adds the correct **Note Number** to any new note.

6. Click **Save**. The Notes table changes to reflect the addition.

**To Edit Notes:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Authorized Areas**. The Operators—Authorized Areas page appears.
2. Select an authorized area from the **Assigned Authorized Areas** list.
3. Click **Add/Remove Territories**. The Assign Territories page appears.
4. Select the desired note in the Notes and Reference Documents table at the bottom of the page.
5. Click **Edit**. The Notes and Reference Documents table changes and the notes text area appears.
6. Make the appropriate changes.
7. Click **Save**. The changes appear on the Notes table.

**To Delete Notes:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Authorized Areas**. The Operators—Authorized Areas page appears.
2. Select an authorized area from the **Assigned Authorized Areas** table.
3. Click **Add/Remove Territories**. The Assign Territories page appears.
4. Select the desired note in the **Notes** table at the bottom of the page.

**NOTE:** Only notes that are not assigned to any territory can be deleted. However, users must remember that the Notes table will show all notes entered for all the assigned territories; i.e. though note #11 may not be assigned to the “Japan” authorized area, it will appear in the “Japan” Note table with a “No” under the “Assigned” column. Before deleting a note, users must verify, on the Operators—Authorized Areas page under the “Notes” column in the **Assigned Authorized Areas** table, that the desired note to be deleted is not listed for any other Assigned authorized area.

5. Click **Delete**. A confirmation window appears.
6. Click **Yes**. The note is removed from the Notes table.

**To Assign Notes:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click **Authorized Areas**. The Operators—Authorized Areas page appears.
2. Select an authorized area from the **Assigned Authorized Areas** table.
3. Click **Add/Remove Territories**. The Assign Territories page appears.
4. Select the desired note in the Notes and Reference Documents table at the bottom of the page.
5. Click **Assign**. The Notes table changes to display “Yes” in the “Assigned” column for the selected note.

**To Add Reference Documents (pertaining to a selected Authorized Area):**
1. In the left navigation area, under CHDO > Maintain Operator Data, click **Authorized Areas**. The Operators—Authorized Areas page appears.
2. Select an authorized area from the **Assigned Authorized Areas** table.
3. Click **Add/Remove Territories**. The Assign Territories page appears.
4. Open the **Reference Documents** tab in the table at the bottom of the page:
5. Click Add. The Add Reference Documents form appears:

![Add Reference Documents](image)

6. Select the **CFR** from the drop-down menu.

   **NOTE:** When the screen appears, all but one of the drop-down menus is grayed out (inaccessible). The rest of them will become accessible as valid options are selected.

7. Select the **Part** from the drop-down menu.
8. Select the **Para** from the drop-down menu.
9. Click **Add**. The new Reference Document is automatically saved and the screen resets to allow for another to be added.
10. To view the Reference Document just created, do one of the following:

- Click **Authorized Areas** in the breadcrumb path at the top of the screen, then select the same authorized area selected in Step 2 above.
- Click **Back**, then select the same authorized area selected in Step 2 above.
- Follow steps listed in “To Add Reference Documents (pertaining to a selected Authorized Area)” section above.

**To Delete Reference Documents:**

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Authorized Areas**. The Operators—Authorized Areas screen appears.
2. Select an authorized area from the **Assigned Authorized Areas** list.
3. Click **Add/Remove Territories**. The Assign Territories page appears.
4. Open the **Reference Documents** tab in the table at the bottom of the page.
5. Click **Delete**. A confirmation box appears.
6. Click **Yes**. The reference document is removed from the Reference Documents table.
7. **NOTE:** Some reference documents may not be deletable if the “Deletable” box is not checked by HQ. For more information on HQ Authorized Areas, see the **WebOPSS HQ User Guide**.

4.2.6 **Territories**

The Certificate Holder may assign and modify the general authorized area to more specifically describe its qualities in that area. Any authorized WebOPSS user can:

- Specify whether a territory should be included or excluded in a group
- Identify territories that are allowable to fly over
- Select tracking categories
- Add, edit, delete, or assign notes

When manipulating operator territories, the user will see two lists: **Available Authorized Areas** and **Assigned Authorized Areas**. If there are no Assigned authorized areas, the user must select a deviation from Available Authorized Areas before being able to find and modify it under Assigned Authorized Areas. To assign an authorized area to an operator, select it from the **Available Authorized Areas** table and click the down arrow (▼) between the lists to move it to the **Assigned Authorized Areas** table.

**To Assign Territories:**

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Authorized Areas**. The Operators—Authorized Areas page appears:
2. Select an authorized area from the **Assigned Authorized Areas** table.

3. Click **Add/Remove Territories**. The Assign Territories page appears:
4. Under **Nav Type** on the right side of the map, do one of the following:
   - If the map is at the desired position for territory selection, leave the default selection of **“Select”** as is.
**HINT:** The “Select” option allows users to select a country/ocean on the map.

- To move the direction of the map view, click on the circle next to “PAN,” then click and drag the map to the desired position:

![Figure 4.43: Map Functionality](image)

5. Use the **Detail Level** buttons (+/-) below the directional arrows to increase or decrease the detail of the map image.

6. To identify the territory types, do any of the following:
   a. To include a country, click **Include** and click on a country:
b. To exclude a country, click **Exclude** and click on a country:
c. To designate overflight for a country, click **Overflight** and click on a country:

![Authorized Areas Map]

*Figure 4.46: Overflight a Country*

**NOTE:** The **Overflight** option indicates those countries for whom it is only acceptable to fly over but not stop on.

d. Select either **Include**, **Exclude**, or **Overflight**, and enter the name of the desired country/ocean in the text field below the map:
e. Select either **Include**, **Exclude**, or **Overflight**, and click and drag over the countries to be selected:
7. The map screen updates to show the highlighted country, and the country appears under the corresponding tab on the table below the map.

8. Under the Tracking Categories, do any of the following:
   a. Select either IFR/VFR or VFR Only.

   **HINT:** Selecting IFR/VFR includes both instrument flight rules and visual flight rules. VFR Only indicates that the area is only authorized for the visual flight rules.

   b. Check Turbo Jet and/or Prop.

**To Edit Territories:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Authorized Areas. The Operators—Authorized Areas screen appears.
2. Select an authorized area from the Assigned Authorized Areas list.
3. Click Add/Remove Territories. The Assign Territories page appears.
4. In the Territory table under the map, select the desired territory type tab:
5. Click the **Edit** hyperlink. The Territories table changes and a text box appears under the “**Economic Authority**” column:

![Territory Table](image)

**Figure 4.49: Territory Table**

6. Make the appropriate updates to the **Economic Authority**.
7. Click **Update** hyperlink. The changes appear in the Territories table.

### 4.2.7 Deviations

Operator Deviations are authorizations that allow for a change to, or “deviation” from, existing procedures or standards. Within WebOPSS, they identify the deviation authority, the procedure being changed, and a description of the change itself. WebOPSS supports the ability for any authorized user to assign and edit an operator’s list of deviations.
When manipulating operator deviations, the user will see two lists: the Available Deviation List and the Assigned Deviation List. If there are no Assigned Deviations, the user must select a deviation from Available Deviations before being able to find and modify it under Assigned Deviations. To assign an deviation to an operator, select it from the Available Deviation List and click the down arrow (▼) between the lists to move it to the Assigned Deviation List.

To Edit a Deviation:

1. In the left navigation area, under CHDO > Maintain Operator Data, click Deviations. The Operators—Deviations page appears:

![Figure 4.51: Operator—Deviations](image)

2. Select the desired deviation from the Assigned Deviations List.
3. Click Edit. The Conditions and Limitations box appears.
4. Enter the desired conditions and limitations that apply.
5. Click OK. The Assigned Deviations List changes to reflect the addition.

**To Export an Assigned Deviation:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click Deviations. The Operators—Deviations page appears.
2. Select the desired deviation from the Available Deviation List.
3. Click Export. The File Download box appears.
4. Do one of the following:
   - To open a Microsoft Excel file containing all of the operator history data, click Open.
   - To choose a file location on a local computer in order to open the Excel file containing all of the operator history data later, click Save.

### 4.2.8 DBAs

The WebOPSS system organizes DBA information and allows for authorized users to manipulate the data by adding, editing, and deleting information.

**To Add a DBA:**
1. In the left navigation area, under CHDO > Maintain Operator Data, click DBAs. The Operators—DBAs page appears:
2. Click Add. The Operator—DBAs table changes and a text box appears:
3. Enter the name of the new DBA.
4. Click **Save**. The Operators—DBAs table changes to reflect the addition.

**To Edit an Existing DBA:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **DBAs**. The Operators—DBAs page appears.
2. Select the desired DBA.
3. Click **Edit**. The Operator—DBAs table changes and an editable text box appears.
4. Modify the DBA as needed.
5. Click **Save**. The changes appear on the Operators—DBAs table.

**To Delete a DBA File:**
1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **DBAs**. The Operators—DBAs page appears.
2. Select the desired DBA.
3. Click **Delete**. A confirmation box appears.
4. Click **Yes**. The DBA is removed from the Operators—DBAs table.

4.2.9 Exemptions

Authorized users manage exemption assignments to a specific operator. If an operator is affected by a regulation in **Title 14 of the Code of Federal Regulations (14 CFR)**, they may petition for an exemption from any rule issued by FAA under its statutory authority.
When manipulating operator exemptions, the user will see two lists: the **Available Exemptions** list and the **Assigned Exemptions** list. If there are no Assigned Exemptions, the user must select an exemption from Available Exemptions before being able to find and modify it under Assigned Exemptions. To assign an exemption to an operator, select it from the **Available Exemptions** list and click the down arrow (▼) between the lists to move it to the **Assigned Exemptions** list.

On the Operator Exemptions screen, there are two Search areas:

- The first is located at the top of the screen. This area allows the user to search for both Available and Assigned Exemptions, though not simultaneously.
- The second area is above each of the Exemption lists. Each of the table filters searches through only the exemptions in that list. (For more information on how to use this search filter, see “2.3.6 Using the Search Filter” on page 7.)

**To Search Using the Search Filter at the Top of the Screen:**

1. In the left navigation area, under CHDO > **Maintain Operator Data**, click **Exemptions**. The Operator—Exemptions page appears:
2. Next to “Search Area,” click the circle indicating whether the desired exemption is in the Available or Assigned Exemptions lists.

3. For the Expiration Date, do one of the following:
   - If the exemption has an expiration date, uncheck either No Expiration Date or Never Expires.

**NOTE:** The No Expiration Date and Never Expires checkboxes appear checked by default.
• If the exemption Expires before, on, or after a certain date, use the drop-down to
  indicate the condition, and then click in the empty text field below to choose a date
  from the calendar that appears.

4. Enter the Description in the text field. The search field is not case-sensitive.
5. Click Search. The exemption searched for should appear in its respective list.

To Add an Exemption Remark:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Exemptions. The
   Operator—Exemptions page appears.
2. Select the desired exemption from the Assigned Exemptions table.
3. Click Add Remark. The Exemption Remark window appears.

   HINT: The Exemptions Remark text field allows up to 4,000 characters.

4. Enter the desired remark text in the text field.
5. Click Save. The Assigned Exemptions table changes to reflect the addition.

To Edit an Exemption Remark:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Exemptions. The
   Operator—Exemptions page appears:
2. Select the desired exemption from the Assigned Exemptions table.

   NOTE: When the Operator—Exemptions page first opens, there is only the Add and Delete
   Remark buttons. The Edit Remark button will replace the Add Remark button when an
   exemption is selected from the Assigned Exemptions table that contains the remark text.

3. Click Edit Remark. The Exemption Remark window appears.
4. Enter the desired remark text in the text field.
5. Click Save. The changes appear in the Assigned Exemptions table.

To Delete an Exemption Remark:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Exemptions. The
   Operator—Exemptions page appears.
2. Select the desired exemption from the Assigned Exemptions table.

   NOTE: When the Operator—Exemptions page first opens, the Delete Remark button is
   grayed out (inaccessible). It will become accessible when an exemption is selected from the
   Assigned Exemption list that contains Remark text.

3. Click Delete Remark. The remark is removed from the Assigned Exemptions table.
4.2.10 Insurance

WebOPSS supports the ability to organize insurance information in a table that an authorized user may view, but not manipulate. The user is able to see the particulars of each insurance policy and whether or not any aircraft are associated with that policy.

To View the Insurance List:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Insurance. The Insurance Data table appears:

![Operator — Insurance Table]

**HINT:** The Insurance policies listed are based on most recent Status updates, so the historical data of each policy is not shown (i.e. when the policy is “Pending Review” or “Terminated,” etc.) Such information may appear—though not always—in the “Status Comments” section of the popup window seen when users click on the policy link.

2. Click on the desired hyperlink in the “Policy Number” column to view any aircraft associated with that policy as well as any policy status comments. The Associated Aircraft window appears displaying the aircraft information.

4.2.11 Personnel

WebOPSS supports the ability to add, edit, and delete Operator Personnel.

To Add Operator Personnel:
1. In the left navigation area, under CHDO > Maintain Operator Data, click Personnel. The Operator—Personnel page appears:
2. Click Add. The Add Personnel table appears:
Figure 4.57: Adding Personnel
3. Enter the **First Name** in the text field.
4. If desired, enter the **Middle Name** or middle initial in the text field.
5. Enter the **Last Name** in the text field.
6. If desired, enter a **Suffix** in the text field.
7. Select an **FAA Recognized Position Title** from the drop-down menu.
8. If desired, enter the **Equivalent Position Title** in the text field.
9. If applicable, under the “Personnel Type” section select the boxes next to **Management Personnel, Other Designated Persons**, and/or **Agent for Service**.
10. If applicable, under the “Authorized to Sign the Following Parts” section, select the boxes next to the appropriate Part letters.
11. Click **Save**. The Operator—Personnel page changes to reflect the new addition.

**To Edit Operator Personnel:**

**NOTE:** When the screen appears, the “**Edit,**” “**Delete,**” and “**Copy**” buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Personnel**. The Operator—Personnel page appears.
2. Select the row of the desired personnel.
3. Click **Edit**. The Edit Personnel form appears.
4. Make the necessary changes to the operator personnel.
5. Click **Save**. The changes appear on the Operator—Personnel table.

**To Delete Operator Personnel:**

**NOTE:** When the screen appears, the “**Edit,**” “**Delete,**” and “**Copy**” buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Personnel**. The Operator—Personnel page appears.
2. Select the row of the desired personnel.
3. Click **Delete**. A confirmation box appears.
4. Click **Yes**. The personnel name is removed from the Operator—Personnel table.

**To Copy Operator Personnel:**

**NOTE:** When the screen appears, the “**Edit,**” “**Delete,**” and “**Copy**” buttons will appear grayed out (inaccessible). They will become accessible once a row in the table is selected.

1. In the left navigation area, under **CHDO > Maintain Operator Data**, click **Personnel**. The Operator—Personnel page appears.
2. Select the row of the desired personnel.
3. Click **Copy**. The Copy Personnel page appears.
4. Enter the new personnel name into the First, Middle, and Last Name text fields.
5. Click Save. The Operator-Personnel table changes to reflect the addition.

4.3 Inspectors

While WebOPSS roles are assigned at the office level, any user with permission can edit the Inspector information. For example, managers may edit the Inspector information of those inspectors assigned to their office. The sections that appear within the Edit User form will vary according to the roles-based security permissions designated to each user. To see more detailed information on assigning roles or for an explanation of the level of access and permissions available for a particular role see WebOPSS HQ User Guide.

To Edit an Inspector:
1. In the left navigation area, under CHDO, click Maintain Inspectors. The Inspectors page appears:

![Inspectors Table]

Figure 4.58: Inspectors

2. Do one of the following:
   - Select the row of the desired Inspector, then click Edit. The Edit User form appears.
   - Click the hyperlink in the “Inspector Name” column. The Edit User form appears:
Figure 4.59: Edit User (top half)
3. Make the appropriate changes.
4. Click **Save**. The changes appear in the Inspectors table.

**To Delete an Inspector:**
1. In the left navigation area, under **CHDO**, click **Maintain Inspectors**. The Inspectors page appears.
2. Select the row of the desired Inspector.
3. Click **Delete**. A confirmation box appears.
4. Click **Yes**. The Inspector is removed from the Inspectors table.
To Reassign an Inspector:
1. In the left navigation area, under CHDO, click Maintain Inspectors. The Inspectors page appears.
2. Select the row of the desired Inspector.
3. Click Reassign. The Reassign Inspector form appears:

![Figure 4.61: Reassigning an Inspector](image)

4. Select a designator in the Assigned Operators table.
5. Select a designator in the Available Replacements table.
6. Click Replace. A confirmation box appears.
7. Click Yes. The selected Assigned Operator has been removed from the Inspectors table.

**NOTE:** Reassigning inspectors does not delete the operator, but instead reassigns operators from one inspector to another.
5. Authorizing Documents Management

Below is a high-level graphic depicting the authorizing document process.

The documents created and issued by the FAA through WebOPSS are collectively referred to as “Authorizing Documents.” These documents include but are not limited to the following:

- **Operations Specifications (OpSpec)**, which are used to issue specific operations allowed to operators.
- **Management Specifications (MSpec)**, which are issued to Program Managers who conduct fractional ownership operations under 14 CFR 0 91 K (14CFR 091K).
- **Letters of Authorization (LOA)**, which are used to issue certain authorizations to 14CFR 091 operations.
- **Letters of Deviation Authority (LODA)**, which are statements of conformance and limitations that applicants for deviations must give the FAA, as specified in 14 CFR § 21.605(a)(1).
• **Waivers**, which constitute relief from the specific regulations stated, to the degree and for the period of time specified in the certificate (Waivers do not waive any state law or local ordinance).

Authorizing Documents are a collection of signed, legal documents used to administer Safety Standards and define the Provisions and Limitations within which an Air Operator or Agency may conduct business operations. An authorizing document is considered a legal contractual agreement between the FAA and the Industry customer.

While the authorizing documents have different names and serve different purposes, the process of their creation is generally the same:

1. The system displays the available templates. (For more information, see “Templates” in the WebOPSS HQ User Guide.)
2. A user (whether from the FAA or Industry) selects a template.
3. The user specifies the data necessary to complete the document.
4. The user digitally signs the document.
5. WebOPSS validates the specifications and routes the document to the appropriate FAA personnel for approval.
6. If necessary, the FAA user returns the document for further clarification. Otherwise, the FAA user digitally signs the document.
7. The FAA user activates the document.
8. WebOPSS notifies the originator that the document has been signed/activated.

### 5.1 Authorizing Documents

The Authorizing Documents section allows the user to manage the document that were created in the Template Library (for more information on the Template Library, see the WebOPSS HQ User Guide). The Authorizing Documents page has four tabs from which the user can access and modify authorizing document information:

- Available
- Workspace
- Issued
- Archived

**NOTE:** In the Authorizing Documents section, the default display is the **Issued** Tab. The other three tabs must be manually opened.

Both the **Available** and **Issued** tabs offer Control icons that indicate whether or not the document may have certain limiting conditions that might restrict it from being moved or issued:

- **Stop (regor):** This icon appears in the “Control” column when a mandatory document revision in Available does not match up to the Issued revision. In other words, a new
mandatory version of this document has been created since the older version was processed to Issued. This icon is only seen in Issued.

- **Go ( ):** This icon appears in the “Control” column when the Available and Issued revisions match. When seen under Available, this means that the template can be safely moved to Workspace. When seen in Issued, this means that the most current version of the document exists in that tab.

- **Yield ( ):** This icon appears in the “Control” column when a non-mandatory document revision in Available does not match up to the Issued revision. In other words, a new non-mandatory version of this template has been created since the older version was processed to Issued. This icon is only seen in Issued.

- **Expires ( ):** This icon appears in the “Control” column when a document has an expiration date. By hovering the mouse over this icon, in both Available and Issued, users can see the specific expiration date.

- **Decommissioned ( ):** This icon appears in the “Control” column when a document has been decommissioned. This icon is only seen in Issued.

While some of the document tabs offer functions specific to the types of document displayed in each, there are five functions, explained below, that are common to all of the tabs.

**To View a Document:**
1. In the left navigation under CHDO, click **Maintain Authorizing Documents**. The Authorizing Documents page appears:
2. Do one of the following to open a document:
   - Under any tab, select the row of the desired document and click View. A separate window opens displaying the document information.
   - Under the Available, Issued, or Archived tabs, click on the hyperlink of the desired document in the “Title” column. A separate window opens displaying the document information.

   **NOTE**: There is only a Close Window button in the document window because from this View, none of the documents are editable. Once the template is moved to Workspace, the document will become editable, and the status will be “Draft.”
To Review a Document:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents page appears.
2. Click Review. The Paragraph Review window appears:

![Paragraph Review Window]

Figure 5.3: Paragraph Review Window
3. To export the paragraph review list, do the following:
   a. Click **Export Paragraph List to Excel**.
   b. Click **Open** to open a Microsoft Excel document of the paragraph review list.
   c. Click **Save**. The user can select a file location on a local computer, then open the Excel document of the paragraph review list.

4. To print the paragraph review list, do the following:
   a. Click **Print Missing Paragraph List**.
   b. Select the desired printer/print options.
   c. Click **Print**.

5. To update the Authorizing Document Workspace with the missing paragraphs, click **Apply Missing Paragraphs**. A confirmation window appears.

6. Click **OK**.

**To Export/Print a Document(s):**
1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents page appears.
2. If a specific document is desired, open the appropriate tab and select the desired document row.

   **NOTE:** Users can only print up to 20 documents at a time. This may limit the document selections chosen if the user’s intention is to print them.

3. Under any of the tabs, click **Export/Print**. The Export/Print Options window appears:
NOTE: If users click Export/Print without selecting a specific document, the options will apply to all of the documents in the current tab table.

4. To export, select the circle next to “Export.”
5. To print, select the circle next to “Print.”

NOTE: The selectable options in the window will be grayed out (inaccessible) until either “Export” or “Print” is selected.

6. Select one of the following export/print options:
   - **Selected Paragraph(s):** This option displays only the document text and table contents for a single selected document.
   - **Table of Contents only:** This option displays only the table of contents for multiple documents. When this option is selected, users can select which Parts to view the table of contents (TOC) for.

**HINT:** Multiple TOC Part checkboxes can be selected for either “Table of Contents only” or “All.”
• **All**: This option displays both the TOC and text/table contents for multiple paragraphs. When this option is selected, users can select which Parts to view the full contents for.

7. Click **Continue**.
8. If the “Export” option was selected, the export options are displayed in PDF format.
9. If the “Print” option was selected, the Print Documents window appears:

![Print Documents](image)

**Figure 5.5: Printing Documents**

10. Click **Send to Printer** to print the documents.

**NOTE:** The **Send to Printer** button will be grayed out (inaccessible) until all of the documents in the queue list “Ready” in the “**Status**” column.

**To Compare Documents:**
1. In the left navigation under CHDO, click **Maintain Authorizing Documents**. The Authorizing Documents page appears.
2. Under any tab, select the row of the desired document.
3. Click **Compare**. The Compare Wizard appears:
4. Select the different HQ Versions from the drop-down menus on each document field.

**HINT:** If the same HQ Version is selected for both document fields, the system will display the same version in each field.

5. Click **Compare**. The different versions of the documents appear in the document fields.

**To View Document History:**
1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents page appears.
2. Under any tab, select the row of the desired document.
3. Click **History**. The History window appears:
To View Paragraph Guidance:
See “5.2 Guidance” section on page 132.

To View Paragraph Impacts:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents page appears.
2. Under any tab, select the row of the desired document.
3. Click Impacts. The Impacts window appears:

   ![Figure 5.8: Paragraph Impacts](image)

To Resolve Non-Compliant Insurance:

**NOTE:** If an operator contains any insurance that is in a non-compliant state, users will see a blinking notification at the top of the Authorizing Document page, above the operator information, regardless of which tab is selected.
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents page appears.
2. Click on the blinking Insurance in a Non-Compliant State link:

![Image of Authorizing Documents]

Figure 5.9: Non-Compliant Insurance Link

3. A separate window appears displaying the Operator—Insurance page.

**HINT:** Inspector users are directed to this page so that they can view cancelled policies, associated aircraft, and policy comments.

### 5.1.1 Available

The table in the Available tab lists all documents that have a status of available for the CFR of the selected operator, displayed in descending order by Part and Para. While all four tabs list the document version under the Revision (Rev) columns for each respective tab, the Available list also displays whether or not the document exists in the Workspace or Issued tabs, and if it does, which version exists there.

**To Move a Document to Workspace:**

**NOTE:** The system will not move a document with the same version to Workspace if that same version already exists.

1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents page appears.
2. Open the **Available** tab:
3. Select the row of the desired document.

**HINT:** Users can select multiple documents by holding down Ctrl and clicking the desired rows.

4. Click **Move to Workspace**.
5. If the move was immediately successful, do the following:
   a. A confirmation IE window appears:

   ![Figure 5.11: Move to Workspace Confirmation](image)

   **Figure 5.11: Move to Workspace Confirmation**

   b. Click **OK**. The **Workspace** tab automatically opens.

   **HINT:** Users may be asked to make the document Always Authorized on the A004. Authorizing a document in this way should be done as applicable.

6. If the document was not moved to the Workspace, the Replace Duplicate window opens:
NOTE: This message will not appear when users attempt to move documents with an invalid status to the Workspace (i.e. Archived old or decommissioned revisions).

7. Click Yes. A confirmation window appears.
8. Click OK. The Workspace tab automatically opens.

NOTE: All documents are listed with a default “Draft” status after being moved to the Workspace tab.

5.1.2 Workspace

When a template is moved to Workspace, the template does not relocate within the system; instead, it is “copied” to the Workspace area, and is now considered a “document.” The original template still resides in the Available tab of the Paragraphs page. Under the Workspace tab, a user can also view whether or not a document also exists under the Active tab, and if it does, which revision exists there.

Workspace Document Stages

There are several stages that a document must go through during processing. The “Status” column in the Workspace lists where each document stands in this process:

- Draft: This reflects a document that has been moved to the Workspace, but not yet edited.
- Draft: In Process: This reflects a document that has been edited/reviewed and the changes made have been saved.
- FAA Signed: This reflects that a document has been signed by an FAA Inspector.
- Industry Signed: This reflects that a document has been signed by an industry user.
- FAA & Industry Signed: This reflects that a template has been signed by both an FAA Inspector and an industry user when both were present at the same time in the same location. Unlike other templates with “…Signed” statuses, this designation
allows for two signatures and will show two signature blocks on the printed document.

**HINT:** Documents with status listings of “Draft in Process” or “…Signed” can be redrafted.

**Workspace Functionality**

Because WebOPSS allows for more versatile data entry, when users are in the process of editing a document they will come across a variety of different functionality. This new functionality usually takes the form of icons or buttons that allow users new options to either add data to the document or gain further information about what action is required:

- **Help text** icons (支线任务) exist to provide extra information to the user to mention what information is required in a specific table column or what action is required by the user for a data entry control (such as text boxes, labels, etc.); the icons always appear directly next to the item they provide help for. Hovering the mouse over the icon displays the message “Click for help,” and clicking on the icon opens a popup window containing the actual help text:

  ![Help Text Icon](image)

  **Figure 5.13: Help Text**

- **Adding table rows** is done using the green plus button (+Add) at the bottom of tables. Once users click on the green plus button, a new row is added:
Deleting table rows or changing the sort order is done using the page peeling image. When the user first opens the document to edit, the sort order settings are not visible. By hovering the mouse over the peeling page icon, users can select **Delete Row** (though the system will always keep at least one row), **Sort Ascending/Descending** (which sorts the table based on the set sort order), **Show/Hide Sort Order** (which hides/displays dropdowns in each header column that allow the user to see or modify the column sort order for the table). The system will ensure that two columns do not have the same sort order. When the user changes the sort order, the system will always maintain a sequential sort order by incrementing or decrementing the sort order for the conflicting columns as necessary:
• **Combo boxes** are data entry controls that look like simple dropdown menus, but actually provide the functionality of both a text field and a dropdown. Users should use the help text to identify these, since the help text verbiage will mention that users should “Enter…, or select…”; as an example, a help entry might read “Enter approved methods for obtaining and disseminating weather data. If EWINS is authorized, select N/A.” To enter text in a combo box, users simply click in the text area and begin typing; to select an option, users should click the down arrow and select the desired option (often “N/A”):
**Text (AJAX)** are data entry controls that look like simple text boxes, but actually provide the functionality of both a regular text field and a text-search function. This is used most often with lists of aircraft/runways. Users should use the help text to identify these, since the help text verbiage will mention that users should “Begin typing the first few letters…, then select…or enter value”; as an example, a help entry might read “Begin typing the first few letters of the Airport (ICAO), then select. If selection is not available, enter value.” To enter text in a Text (AJAX), users simply click in the text area and begin typing; to search for options, users should click in the text area and type the first 3 letters of their desired option, and any matching selections will appear in a dropdown menu:
Links to **Data Forms** pages are indicated by the green plus with page icon ( ) at the bottom of tables. Data Forms pages allow users to access other areas of WebOPSS that contain operator data within the context of the document being edited and without leaving the Authorizing Documents section. Data Forms links only appear at the bottom of tables that pre-fill with operator data; in other words, a link to a Data Forms page will not appear at the bottom of a table in which all the columns must be completed by the user, such as with text fields and dropdowns. Users will only access the Data Forms page in a document if they need to add, edit, or remove the data from a pre-filled table. To do so, users simply click on the Data Forms icon and make the necessary changes on the Data Forms page. Once the new data is entered, users can click **Refresh and Close** for the new data to be displayed in the document:
Labels are indicated by the pencil icon ( MouseButton ). These data entry controls are data that automatically display when there is data entered, but show nothing when there is no data to enter. Most of the help text verbiage for labels will mention that users should “LOAD from database...”; as an example, a help entry might read “Agent for Service - LOAD name and address from database.” To change a label’s data, users click on the pencil icon, and will be taken to a Data Forms page to enter the correct information.
Once the new data is entered, users can click **Refresh and Close** for the new data to be displayed in the document:

![Label Control](image)

**Figure 5.19: Label Control**

**To Edit a Document:**
1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents page appears.
2. Open the **Workspace** tab:

![Authorizing Documents—Workspace Tab](image)

**Figure 5.20: Authorizing Documents—Workspace Tab**
3. Select the row of the desired document.
4. Click **Edit**. A separate window opens displaying the document information.
5. If desired, click **From Active**.

**NOTE**: The **From Active** button will only appear for documents that already have a version that has been previously Issued. Clicking **From Active** brings over the data stored in the Issued document to the current open window (for ex., a table with several rows of aircraft information that have dropdown options in each).

6. Make the necessary changes to the document.
7. Click either **Save and Apply** or **Apply**.

**HINT**: There are two ways to save changes to the document once it has been edited. Clicking **Save and Apply** will save the information and close the window containing the document information. Clicking **Apply** will save the information but keep the window open for further changes.

8. If **Save and Apply** is clicked, do the following:
   a. A pop-up window appears to verify a successful action.
   b. Click **OK**.
9. If **Apply** is clicked, do the following:
   a. Make the necessary edits to the rest of the document.
   b. Close the window by clicking either **Close Window** at the bottom of the screen or the red X at the upper right corner of the window (🗙).

**HINT**: There is no need to reselect the recently changed document, since it remains selected after the document information window is closed. Also, the document status is changed from “Draft” to “Draft: In process.” However, this will only be visible once the browser is refreshed either by clicking the browser refresh button (🗹) or selecting F5.

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**To Sign a Document:**
1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents table appears.
2. Open the **Workspace** tab.
3. Select the row of the desired document.
4. Click **Sign**.

**NOTE**: Depending on the role of the current user, different options may appear on the Sign Executed Document page.

5. If the current user is an Inspector, the Sign Executed Document screen appears:
6. If the current user is a field user, the Sign Executed Document screen appears:
NOTE: A signed authorizing document is referred to as an “executed” authorizing document.

7. If the current user is an Inspector, under the “Signers” section, select either the circle for **FAA** for an FAA Signature, or **FAA & Industry** if both parties are present at the same time and location to sign the document.

8. Under the “Signer Type” section, do one of the following:
   - If **FAA** was selected under the “Signers” section, the dropdown list is grayed out (inaccessible) and **FAA Inspector** is selected by default.
• If FAA & Industry was selected under the “Signers” section, select either FAA Inspector or Certificate Holder from the dropdown list.

**NOTE:** Since the FAA and Industry option was selected, the document can display two signatures for the one authorizing document. If the current user is signing this type of authorizing document as an Inspector, the user should select the FAA Inspector option. If the current user is signing as the Certificate Holder, the user should select the Certificate Holder option.

• If the current user is a Field User, the dropdown list is grayed out (inaccessible) and the current certificate holder is selected by default.

9. If the current user is an Inspector and if desired, check the Move to ‘Issued’ after signing box.
10. If desired, change the New Amendment # in the text field.
11. Under the “Origin” section, select either Issued by FAA or Certificate Holder applies for these Operations.
12. If desired, enter support information in the Support Information Reference text field.

**HINT:** Support information can be entered by either party.

13. If desired, select the Acceptor from the dropdown list.
14. If the current user is an Inspector, select the Issuer from the dropdown list.
15. If desired, click in the Effective Date text field to choose a date from the calendar that appears.
16. If desired, click in the Approved Date text field to choose a date from the calendar that appears.
17. To Upload .pfx or .p12 Digital Certificate File, click Browse.
18. Find and select the digital certificate file.

**NOTE:** Users must supply a valid digital certificate. Invalid certificates are considered to be those which have expired since the date of issuance or which have been revoked (e.g. the user issued the certificate has since left the company). If users are unable to successfully sign with a digital certificate, go to Tools > Getting Help in the left navigation bar for Digital Certificate Support.

19. Click Open.
20. Enter the Private Key Password field.
21. Select an Acceptor from the drop-down menu.

**HINT:** Selecting acceptor name means that the current user is signing on behalf of the selected user.

22. Click Sign.
To Preview a Document:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents page appears.
2. Open the Workspace tab.
3. Select the row of the desired document.
4. Click Preview. A separate window opens displaying the document information in PDF format.
5. Close the document information window by either clicking the Close Window button at the bottom of the screen or the red X at the upper right corner of the window ( ).

To Issue a Document:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents table appears.
2. Open the Workspace tab.
3. Select the row of the desired document.

**HINT:** The selected document must meet two criteria before being Issued: 1) it must be authorized in the active A004, and 2) it must have a status of either “FAA Signed,” “Industry Signed,” or “FAA & Industry Signed.”

4. Click Issue. A confirmation box appears.
5. Click Yes. A pop-up window appears to verify a successful action.

To Reload a Document:

**HINT:** Clicking Reload while a document is highlighted clears all of the editable data from the template and sets it back to its original state before changes were made. This is similar to deleting a document from the Workspace tab, then moving the same document from the Available tab to the Workspace tab again. Additionally, the document status is changed from “Draft: In process” to “Draft.”

1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents screen appears.
2. Open the Workspace tab.
3. Select the row of the desired document.
4. Click the Reload button. A pop-up window appears to verify a successful action.
5. Click OK.
To Synchronize the Workspace:

**HINT:** Synchronizing the Workspace is, essentially, a gathering of document from across all areas of the Authorizing Documents page. By default, this action will move all of the “Always Authorized” document in Available to Workspace. Depending on what synchronizing options users select, document from other tabs can be moved to the Workspace for any necessary editing.

1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents table appears.
2. Open the **Workspace** tab.
3. Click **Synchronize**. The Populate Workspace window appears:

   ![Figure 5.23: Populate Workspace](image)

   **NOTE:** By default, the “**Populate the workspace grid with all of the always authorized paragraphs?**” box is always checked.

4. If desired, do the following:
   a. Check the box next to **“Do you want to synchronize with your Active A004?”**
      **HINT:** If this option is selected, all of the documents listed as “Always Authorized” in the Issued A004 template are moved to the Workspace.
   b. Check the box next to **“If applicable, do you want to replace documents with new non-mandatory authorizing documents?”**
      **HINT:** If this option is selected, any document in the **Workspace** tab that is a revision or non-mandatory will be over-written by the newer Non-Mandatory version from the **Available** tab.

5. Click **Continue**. If the box in 4b (above) was checked: if document in the **Workspace** tab is a revision or non-mandatory, that version will be over-written by the newer Non-Mandatory version from the **Available** tab.
To Delete a Document:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents table appears.
2. Open the Workspace tab.
3. Select the row of the desired document.
4. Click Delete. A pop-up window appears to verify a successful action.
5. Click OK. The document has been removed from the workspace.

5.1.3 Issued
The table in the Issued tab lists all active documents. When a document is activated in the Workspace tab, the version number is altered to display the newest version, and the old version of the document is moved to the Archive tab.

**NOTE:** When users export a document from this tab, the Effective Date appears when users export the TOC only.

**Issued Document Stages**
The “Status” column here contains different statuses than in the Workspace, though the meanings are the same in both:

<table>
<thead>
<tr>
<th>Workspace Status</th>
<th>Issued Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Industry Signed”</td>
<td>---N/A---</td>
<td>---N/A---</td>
</tr>
<tr>
<td>“FAA Signed”</td>
<td>“Active—FAA”</td>
<td>This reflects that a document has been signed by an FAA Inspector.</td>
</tr>
<tr>
<td>“FAA &amp; Ind. Signed”</td>
<td>“Active—FAA &amp; Ind.”</td>
<td>This reflects that a template has been signed by both an FAA Inspector and an industry user when both were present at the same time in the same location. This designation allows for two signatures and will show two signature blocks on the printed document.</td>
</tr>
</tbody>
</table>

To Archive a Document:

**NOTE:** Archiving a document is a role-based permission. For some industry users without the appropriate permission, the Archive button may be hidden; inspectors and select field users should have access.

1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents table appears.
2. Open the Issued tab:
3. Select the row of the desired document.
4. Click **Archive**. A confirmation window opens to verify the action.
5. Click **OK**. A pop-up window appears to verify a successful action.

**To Move a Copy of a Document back to the Workspace:**
1. In the left navigation under **CHDO**, click **Maintain Authorizing Documents**. The Authorizing Documents table appears.
2. Open the **Issued** tab.
3. Select the row of the desired document.
4. Click **Move Copy to Workspace**.
5. If the document cannot be copied, a window appears indicating why:

   ![Figure 5.25: Move to Workspace Confirmation](image)

   **Windows Internet Explorer**

   Successfully moved to Workspace:
   - None

   Unable to move to Workspace:
   - A002 already exists in your workspace

   **OK**

**HINT:** The document may also be unable to be moved to Workspace if it was decommissioned.
6. Click **OK**.
7. If the document can be copied, a confirmation window appears:

![Copy to Workspace Options](image1)

**Figure 5.26: Copy to Workspace Options**

8. Do one of the following:
   - Click **OK** to copy the old version of the document if it has not expired.
   - Click **Cancel** to copy the latest version of the document.
9. If the document was not moved to the Workspace, the **Replace Duplicate** window opens:

![Replace Workspace Copy](image2)

**Figure 5.27: Replace Workspace Copy**

10. Click **Yes**. A confirmation window appears.
11. Click **OK**. The **Workspace** tab automatically opens.

**NOTE:** All document are listed with a default “Draft” status after being moved to the **Workspace** tab.
5.1.4 Archived

The table in Archived lists all archived documents. Archived documents are the older versions of a document for which a new version has been created. When a document is activated in the Workspace, the version number is altered to display the newest version, and the old version of the document is moved to Archived.

5.2 Guidance

Below is a high-level graphic depicting the guidance process.
WebOPSS allows guidance to be associated with each proposal or authorizing document template. Guidance, which falls under the FAA domain, serves as a reference when creating proposals and authorizing documents. When working with available templates and authorizing documents, guidance is available for each document. Guidance may be any file type as well as a hyperlinked document.

To View Paragraph Guidance:
1. In the left navigation under CHDO, click Maintain Authorizing Documents. The Authorizing Documents form appears:

![Figure 5.29: Authorizing Documents](image)

2. Select the row of the desired document.
3. Click Guidance. The Guidance window appears with Guidance documents associated with that document:
4. Under the “Media Type” column, click the File hyperlink to view the document. The File Dialog box appears.
5. Do one of the following:
   - Click Open to open a Microsoft Word document of the Guidance attachment.
   - Click Save. The user can select a file location on a local computer, then open the Word document of the Guidance attached to that document.

6. Proposal Submissions

Below is a high-level graphic depicting the proposal submission process.
The WebOPSS system allows any authorized user to create, modify, submit, and withdraw proposals. However, a proposal can only be approved for consideration by a Flight Standards Service (AFS) subject matter expert (SME). While the user is busy drafting a proposal, any saved draft is stored under Drafts in the particular user’s Inbox (for more information on drafts, see “3.6 Drafts” on page 26).
6.1 Template Proposals

To Submit a Proposal:

1. In the left navigation, under CHDO, click Template Proposals. The Submit Proposal wizard appears:

   ![Submit Proposal Wizard](image)

   **Figure 6.2: Submit Proposal Wizard**

2. Under the “Information” section, enter the Subject in the text field.

   **HINT:** At any time during the proposal submission process, the user may save the proposal as a draft by clicking the Save as Draft button.

3. If desired, select the Proposal Type from the drop-down menu.
4. If desired, select the Type of Change from the drop-down menu.

   **NOTE:** When the screen appears, all but one of the drop-down menus under CFR is grayed out (inaccessible). The rest of them will become accessible as valid options are selected.

6. Click Next.
7. Enter the proposal information in the Summary of Proposed Changes text field.
8. Click Next.
9. Enter any Comments in the Statement text field.
10. Click Next. The Attachments form appears:
11. If desired, do any of the following:
   a. Enter the **Title**, **Description**, and/or any applicable **Keywords** in the appropriate fields.
   b. To upload a file, click the **Browse** button.
   c. Click **Upload** to upload the information to the proposal submission.

12. Click **Next**. The Submit Proposal guidance table appears:
13. To associate existing guidance to the proposal, select the desired item from the **Available Guidance** table.

**HINT:** Guidance files provide reference or background information that is useful in proposal development.

14. Click the down arrow (↓) below the top table. The item appears in the **Associated Guidance** table.

15. Click **Submit**. Depending on the business rules defined for Workflow, the proposal will appear as a task in someone’s Inbox.

### 7. User Management

WebOPSS allows for authorized users to manage the information of operators within their range of influence. For example, on the field level, authorized managers can view only the operators who report to them. However, any user can edit their own Basic User Account information within the system.
7.1 Users

WebOPSS supports two types of user designation: Active Directory Users and External users. Active Directory users are created and managed on the Headquarters level. (For more information about Active Directory users, see the WebOPSS HQ User Guide.) This guide will deal primarily with external users, which are those users who are accessing WebOPSS over the internet. These are typically industry users, but may be FAA users without access to the FAA domain.

7.1.1 Searching for Users

In most of the WebOPSS search filters throughout the system, users can not only enter specific information to search for, but can also select a button at the top of most table columns to select the search parameters.

To Select the Search Criteria:

1. Click the button at the top of the table column (usually either = or ). The search criteria drop-down list appears:

![Select Search Criteria](image)

![Figure 7.1: Select Search Criteria](image)

2. Select one of the following search criteria:
   - **Equals** ( = ) : this means that the filter will search for all entries containing only the search text.
   - **Starts With** ( ) : this means that the filter will search for all entries that start with the search text.
• **Ends With ( )**: this means that the filter will search for all entries that end with the search text.
• **Contains ( )**: this means that the filter will search for all entries that contain all or part of the search text.

**To Enter Search Text:**
1. Double-click in the blank area to the right of the search criteria button, once the desired search criteria is selected:

![Figure 7.2: Enter Search Criteria](image)

2. Enter the search text in any of the search fields above a column, and press **Enter** on the computer keyboard. The search results appear in the table below the search field.

**HINT**: While viewing user information, the first click on any column heading displays the records in ascending (0-9, A-Z) order and the second click on any column heading reverses the order (Z-A, 9-0).

### 7.2 Editing User Account Information

All users can edit the Personal and Contact information in their own Basic User Account. However, only authorized users can change a user’s security role or Active/Inactive Status. The sections that appear within the Edit User form will vary according to the roles-based security permissions designated by headquarters staff to each user. To see more detailed information on modifying user accounts or for an explanation of the level of access and permissions available for a particular role see *WebOPSS HQ User Guide*.

**To Edit a User Account:**
1. In the left navigation area, under **CHDO**, click **Users**. The Security—Users table appears:
2. Do one of the following:
   - Click the hyperlink of the desired user in the **Name** column. The Edit User form appears.
   - Select the row of the desired user, and click **Edit**. The Edit User form appears:

![Security - Users Table](image-url)

**Figure 7.3: Security—Users**
Figure 7.4: Edit User (top half)
3. Make the desired changes.

8. Reports

WebOPSS supports the ability for any authorized user to generate a system report based on unique selection parameters.
8.1 Standard Reports

**NOTE:** Standard reports display a set of canned reports.

To View a Standard Report:
1. In the left navigation area, under **Tools**, click **Reports**.
2. Click **Standard**. The Report Server page appears:

![Report Server](image)

3. Click the appropriate name for the desired report option. The Report option page appears:

![Reports - Insurance Viewer](image)

4. Enter the search parameters for the desired report.
5. In the figure above, the Insurance Viewer is shown. To fill out the search parameters for this viewer, for example, the user would do the following:
   a. Select the **Operator Type** from the drop-down menu:
Figure 8.3: Reports—dropdown menu selections

NOTE: The dropdown menu selections are checkboxes. Once the user selects the desired option(s), all of the selections will appear in the dropdown menu text.

b. Select the Certificate Status from the drop-down menu.
c. Enter the Insurance Operator Name in the text field.
d. Select the CFR from the dropdown list.
e. Enter the Designator and the Operator Name in the text fields.
f. Select a Region and/or Office from the dropdown menus.

6. Click View Report. The desired report table appears below the search area:
7. To export the report, do the following:
   a. Select the file type from the drop-down menu directly under the search area:
b. Click **Export**. The File Dialog box appears.
c. To open the report in the selected file type, click **Open**.
d. To select a file location on a local computer in order to open the report later, click **Save**.

### 8.2 Custom Reports

Custom reports display a set of customizable reports. Because they are set at an HQ level, access to them is permission-based, and they are only available to authorized users. For more information on HQ Custom reports, see the *WebOPSS HQ User Guide*.

### 9. Tools

WebOPSS offers various help aids for users that support the following functions:

- **Getting Help**: offers FAA Point of Contact, direction for User Guide help, and Digital Certificate Support contact.
- **About**: offers information about the current WebOPSS build and lists the current user’s username and role.
- **FAQ**: offers Frequently Asked Questions and their answers.
- **WebOPSS Transition CBT**: offers interactive computer based training on basic WebOPSS functions in the transition from OPSS to WebOPSS.
- **CHDO User Manual**: generates a PDF version of this document.
- **Feedback**: offers the opportunity for user feedback.
- **Digital Certificates**: allows users to request a digital certificate (used to sign authorizing documents) and edit the personal information for users with existing certificates.
• **Release notes**: generates a Word document containing the latest build release notes.

To Start WebOPSS Transition CBT:
1. In the left navigation area, under **Tools**, click **WebOPSS Transition CBT**. The eLMS Notice appears:

![Figure 9.1: WebOPSS CBT eLMS Notice](image)

2. Click **Click here to continue**. The CBT Lesson Menu appears:
3. Click on the link for the desired lesson. The lesson will appear in a new IE window:
4. Follow on-screen instruction to proceed.

To View FAQs:
1. In the left navigation area, under Tools, click FAQ. The Frequently Asked Questions page appears:
2. To return to the WebOPSS Home page, click Back.

To View CHDO User Manual:
1. In the left navigation area, under Tools, click CHDO—User Manual. A window appears displaying this Field User Guide as a PDF file.
2. To navigate the PDF, do one of the following:
   - Go to the Table of Contents page and click on the desired topic.
   - Click the page icon in the left navigation bar ( ) to go to a desired page.
   - Click the binoculars icon in the left navigation bar ( ) to search for desired terms.

To View HQ User Manual:
1. In the left navigation area, under Tools, click HQ—User Manual. A window appears displaying the HQ User Guide as a PDF file.
2. To navigate the PDF, do one of the following:
   - Go to the Table of Contents page and click on the desired topic.
   - Click the page icon in the left navigation bar ( ) to go to a desired page.
   - Click the binoculars icon in the left navigation bar ( ) to search for desired terms.

To Offer Feedback:
1. In the left navigation area, under Tools, click Feedback. The Help—Feedback form appears:
2. Enter the desired Feedback in the text field.
3. Click Submit. A confirmation message is displayed on the Feedback page.

To Manage Digital Certificates:
1. In the left navigation area, under Tools, click Digital Certificates. The Digital Certificates page appears:
2. To request a digital certificate, do the following:
   a. Click **Submit Request**.
   b. A notification box appears.
   c. Click **OK**.
   d. A confirmation box appears.
   e. Click **OK**. The Digital Certificates page changes to reflect the request submission.

3. To edit an existing digital certificate data, do the following:
   a. Click **Edit Personal Info**. The Edit User page appears:
Figure 9.7: Edit User Page
b. Make the desired changes.
c. Click Save. The user is returned to the Security Users page.

To View Release Notes:
1. In the left navigation area, under Tools, click Release Notes. The File Download box appears.
2. Do one of the following:
   - Click Open to open a Microsoft Word file containing all of the Release note data.
   - Click Save. The user can save a file location on a local computer, then open the Word file containing all of the Release Note data.

For any questions regarding the information contained in this WebOPSS Field User Guide, please contact the WebOPSS Technical Support at (877) 287-6731 or email AFS-WebOPSS@faa.gov.