

AVS EFORM SERVICE

USER GUIDE



Last Modified:

December 2018

Version 8.0

**DEPARTMENT OF TRANSPORTATION
FEDERAL AVIATION ADMINISTRATION
OFFICE OF REGULATION AND CERTIFICATION**

AVS eForm Service User Guide	Revision: 8.0
	Date: Dec 2018

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REVISION HISTORY		
Rev	Description of Change	Effective Date
1.0	((Web Release v2.0.0) Initial Release. (Document generated by RoboHelp Online Help System and then reformatted to add Title Page with FAA logo, headers and footers, etc. to match other eForms documents.	06/18/2009
2.0	(Web Release v2.0.2) Updated screenshots to show web pages with new template; added eForms Admin link to Form Manager top menu; changed AVS Support Central with AVS National Service Desk	09/28/2009
2.1	Prepared document for pending release of AVS Provisioning Service - - Replaced MyProfile with Default Login in Login Box. Also, changed Save to Worklist and Save Offline buttons in form view.	01/04/2010
3.0	(Web Release v2.1.0) Updated System Requirements and updated screenshots to reflect new versions of Adobe Acrobat/Reader.	02/25/2010
4.0	(Web Release v2.1.1.) Updated document to change Default Login back to My Profile	09/13/2010
4.1	Updated System Requirements.	11/09/2010
5.0	(Web Release v2.1.3) Added NSD contact under 'Before You Begin' section.	10/28/2011
5.1	Misc. Updates: Added link to User Support under Locked Account; added screenshot for Tutorials page under User Support (these changes went out with Release v2.1.3a6 which affected Form 337)	09/24/2011
6.0	(Web Release v2.2) Updated System Requirements and Windows/Adobe screenshots due to Standard Client 3.0 implementation and web template changes.	08/15/2013
7.0	Changes to Helpdesk contact information, updates to User Requirements (Adobe DC, Flash Player and Google Chrome), added new screen shots to reflect changes made in Adobe DC.	1/2018
8.0	Updated screen shots for Windows 10.	12/2018

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1. Before You Begin

Welcome to the FAA eForm Service Help system. This system will guide you through the different aspects of using the electronic forms. It will walk you through Form Manager; provide answers to general questions, cover system access, and much more.

If you have any problems, need assistance with the form, or have requests to make changes or additions, please feel free to contact the helpdesk 24 hours/7days a week.

Phone: 1-844-FAA-MyIT (322-6948)

Email: [Helpdesk](#)

***NOTE:** All updates to forms within the eForm Service are only to bring them into compliance with the existing forms as designed by the form owners. The eForm Service does NOT alter the actual form design or make changes that are not on these existing forms.

2. System Requirements

The following operating system has been tested and certified to work with the eForm Service and subsequent forms. Therefore, we can provide user support only for this environment.

Windows Platforms (Supported)

- Adobe Acrobat DC (or later) or Adobe Reader DC (or later)
- Adobe Flash Player v30.0.0.154 (or later)
- Intel 1.3 GHz processor (or faster)
- Microsoft Windows 7 and Windows 10
- 128MB of RAM (256MB or higher recommended)
- 335MB of available hard disk space
- Microsoft Internet Explorer 11 (32-bit)

Although Adobe Corporation advertises that their Reader product works on other operating systems (see list below), Aviation Safety does not have the resources to support these multiple platforms.

Windows Platforms or Applications (Not Supported)

- Firefox
- Chrome
- Safari

Macintosh

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Linux

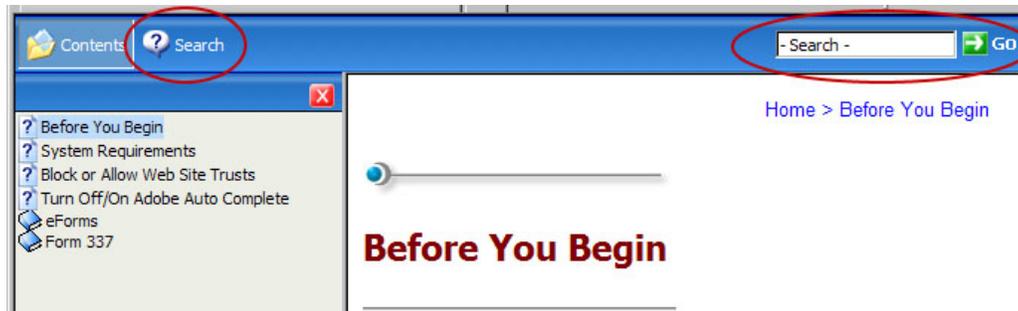
Solaris

-

NOTE: Currently, touchpads such as the iPad, Kindle Fire, Nook or other similar devices have NOT been tested with eForms.

3. Searching for a Help Topic

Use the Search feature in the Help system to easily find a topic. Typing a keyword or set of words (i.e. digital signature) in the Search box will display a list of topics that contain that word. Select the most likely topic that will have the information you need.



4. Block or Allow Web Site Trusts

To manually allow web sites or change a web site from 'blocked' to 'allowed', follow the instructions below.

Manually Allow Web Sites

1. Open Adobe Acrobat or Adobe Reader.
2. Click **Edit > Preferences** on the menu bar at the top of the screen.
3. Select **Trust Manager** in the Categories list.
4. Click the **Change Settings** button under the Resource Access section.
5. Type the web address in the text box.
6. Click the **Allow** button.
7. Click the **OK** button to save and close the Preferences.

IMPORTANT: To use the eForm Service where data searches are involved, it is required to always allow the eformservice.faa.gov web site trust.

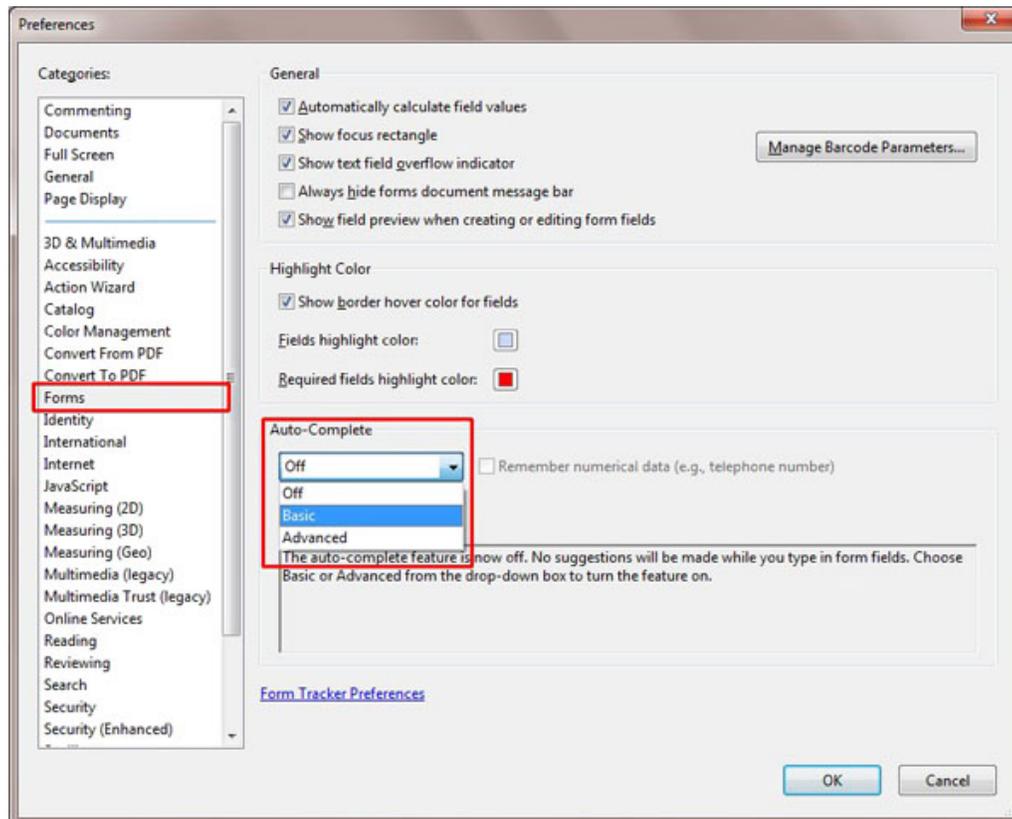
Change Blocked Web Sites to Allowed

1. Open Adobe Acrobat or Adobe Reader.
2. Click **Edit > Preferences** on the menu bar at the top of the screen.
3. Select **Trust Manager** in the Categories list.
4. Click the **Change Settings** button under the Resource Access section.
5. Highlight the web site in the Site listing that you want to unblock.
6. Click the **Delete** button.
7. To allow the web site:
 - The next time you access the web site it will ask you to Allow or Block the web site you are entering. Click the **Allow** button. The web site will add itself to the Allow list in Adobe.
 - If you want to manually add the web site instead of waiting till the next time you visit the web site, follow the above set of instructions on how to manually allow web sites.
8. Click the **OK** button to save and close the Preferences.

5. Turn Off/On Adobe Auto Complete

Turn On Adobe Auto Complete

1. Open Adobe Acrobat or Adobe Reader. (Note: The screenshot below of the Preferences Dialog Box was taken from Adobe Acrobat. Adobe Reader may look slightly different.)
2. Click **Edit > Preferences** on the menu bar at the top of the screen.
3. Select **Forms** in the Categories list.
4. Near bottom of the screen, under Auto-Complete, click on the drop down box and change the settings from 'Off' to 'Basic'.
5. Click the **OK** button to save and close the Preferences.



Turn Off Adobe Auto Complete

1. Open Adobe Acrobat Reader or click AcroRd32.exe to open Adobe Acrobat Reader.
2. Click **Edit > Preferences** on the menu bar at the top of the screen.
3. Select **Forms** in the Categories list.
4. Near bottom of the screen, under Auto-Complete, click on the drop-down box and change the settings from 'Basic' to 'Off'.
5. Click the **OK** button to save and close the Preferences.

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6. User Support

The eForms home page contains the User Support links on the left side of the window.



**Federal Aviation
Administration**

[eForms Home Page](#)

Available Functions:

Home

- » [Login](#)
- [What's New](#)
- [System Requirements](#)
- [User Support](#)
- [Help Topics](#)
- [Tutorials](#)

eForms Applications

- [Form 337 Home Page](#)

eForms Home Page

eForms Service
The Office of Aviation Safety (AVS) provides an electronic Form Service in support of the Government PaperWork Elimination Act (GPEA) and eGOV initiatives. Creating and submitting forms electronically greatly speeds up form processing as opposed to manual paper processing methods.

Registration
The AVS electronic Form Service user interface (Form Manager) is a secure web-based application and, therefore, requires a user account and password within the AVS domain for access. FAA/AVS employees can access the system with their AVS user account and use the available forms within Form Manager based on that account's permissions.

In some cases, (such as the [Electronic Form 337](#)) industry users may need to present their current FAA-issued certifications before access is granted. This may require making an appointment to visit the local field office. See the [Electronic Form 337](#) site for details.



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Web Policies

- [Web Policies & Notices](#)
- [Privacy Policy](#)

Government Sites

- [DOT.gov](#)
- [USA.gov](#)
- [Recovery.gov](#)
- [Regulations.gov](#)
- [Data.gov](#)

Contact Us

- [Contact Info](#)
- [Email](#)
- [Site Feedback](#)

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To contact the helpdesk, click on “**User Support**” on the home page. The following window displays, which contains the phone numbers and an email link to the helpdesk.



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[eForms Home Page](#)

Available Functions:

Home

[» Login](#)

What's New

System Requirements

User Support

Help Topics

Tutorials

eForms User Support

User support is available from the Helpdesk for help with many different aspects of the eForms. The Helpdesk can help with access, passwords, and some level of application support.

Web-based on-line help and tutorials are available from the help and tutorial sections accessed from the main eForms web site.

Aviation Safety User Support is provided for the eForms only for specific Windows platforms.

Please visit the eForms "[System Requirements](#)" page for a listing of computer hardware, software and operating systems supported.

Contact the Helpdesk at:

1-844-FAA-MyIT (1-844-322-6948)

[Email the Helpdesk](#)



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To access the eForm Service Help Topics and the User Guide, click on “**Help Topics**” on the home page. The following window displays, which contains the link to the Help Topics and User Guide.

Federal Aviation Administration [eForms Home Page](#)

Available Functions:

- Home
- » [Login](#)
- What's New
- System Requirements
- User Support
- [Help Topics](#)**
- Tutorials

eForms Home Page

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In some cases, (such as the [Electronic Form 337](#)) industry users may need to present their current FAA-issued certifications before access is granted. This may require making an appointment to visit the local field office. See the [Electronic Form 337](#) site for details.

eForms Applications
→ [Form 337 Home Page](#)

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To access the eForm Service Tutorials, click “**Tutorials**” on the home page to display a menu page with links to several tutorials.



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[eForms Home Page](#)

Available Functions:

- Home
- » Login
- What's New
- System Requirements
- User Support
- Help Topics
- Tutorials**

eForms Applications

- Form 337 Home Page

eForms Tutorials

Getting Started with the Tutorials	Changing the Task Description	
Accessing the eForm System	Creating a New Instance of the Form	
Setting Preferences	Forwarding a Form	
Setting Favorites and Searching Forms	Saving a Form	
Creating Room to See More of the Form	Printing a Form	
Navigating Form Manager	Emailing a Copy of the Form	
Opening and Completing a Form	Claiming a Shared Form	



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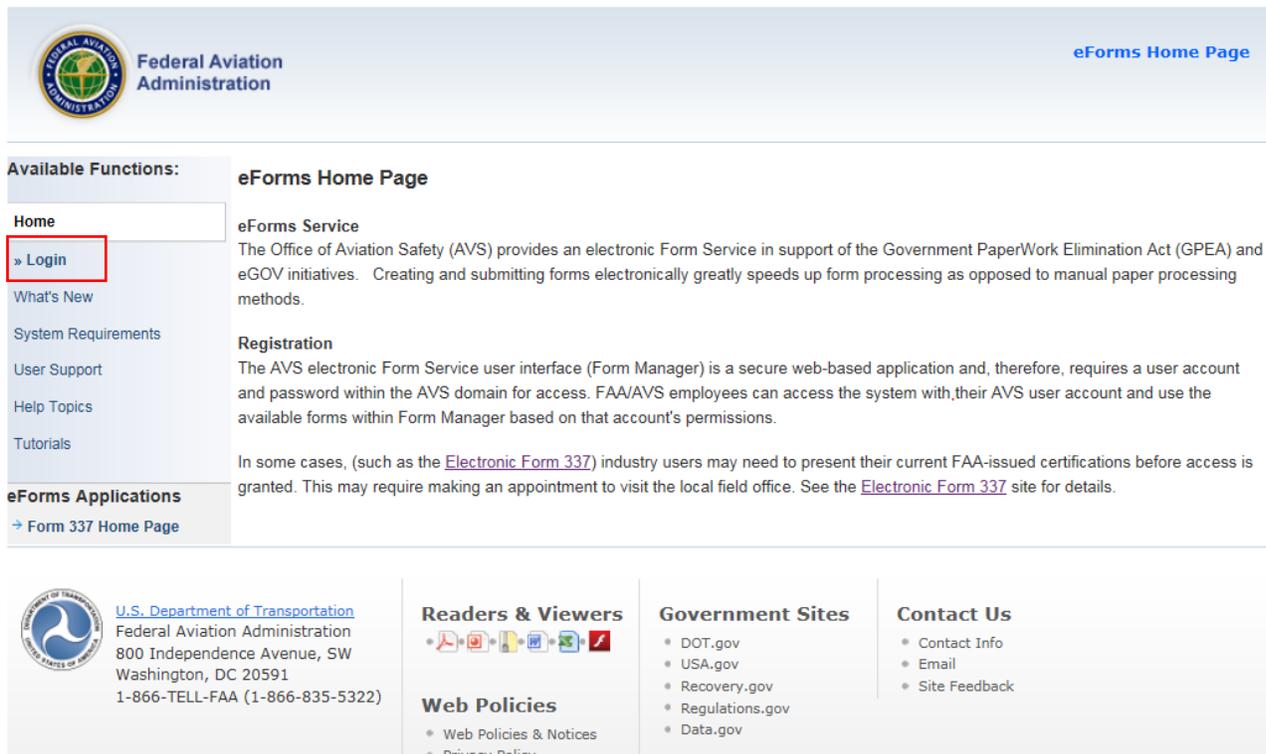
7. eForms

7.1 User Login/Logout

7.1.1 Login

To enter the eForm system, follow the login procedure below.

1. Access the <http://eformservice.faa.gov/eForms.aspx> web site.
2. Click the **Login** link on the left navigation pane.



Available Functions:

- Home
- » **Login**
- What's New
- System Requirements
- User Support
- Help Topics
- Tutorials

eForms Applications

- [Form 337 Home Page](#)

eForms Home Page

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- A "System Use Notice" page appears. To proceed to the eForm login page, click on the **I Agree** button.

Federal Aviation Administration [eForms Home Page](#)

System Use Notice

- You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.
- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
 - You have no reasonable expectation of privacy regarding any communications or information transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search, and seize any communication or information transiting or stored on this information system
 - Any communications or information transiting or stored on this information system may be disclosed or used for any lawful government purpose.

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- Data.gov

Contact Us

- Contact Info
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- Site Feedback

NOTE: After five attempts of entering the wrong login information, the system will log you out as shown below. Close the browser, re-open it, and re-navigate back to the Login page.

Federal Aviation Administration

Available Functions:

- Home
- Login Disabled**
- What's New
- System Requirements
- User Support
- Help Topics
- Tutorials

eForms Applications

- [Form 337 Home Page](#)

Federal Aviation Administration - AVS eForms - Login

***** Logged Out *****

To login again, please close the browser and reopen it.

Use this page to log into the AVS eForm Service using your assigned AVS User ID and Password

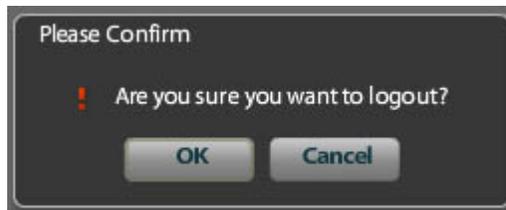
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7.1.2 Logout

1. To log out of the eForm system, click on the **Logout** button on the top menu bar of the Form Manager.



2. A confirmation window will appear, as shown below. Click **OK** to exit the Form Manager.

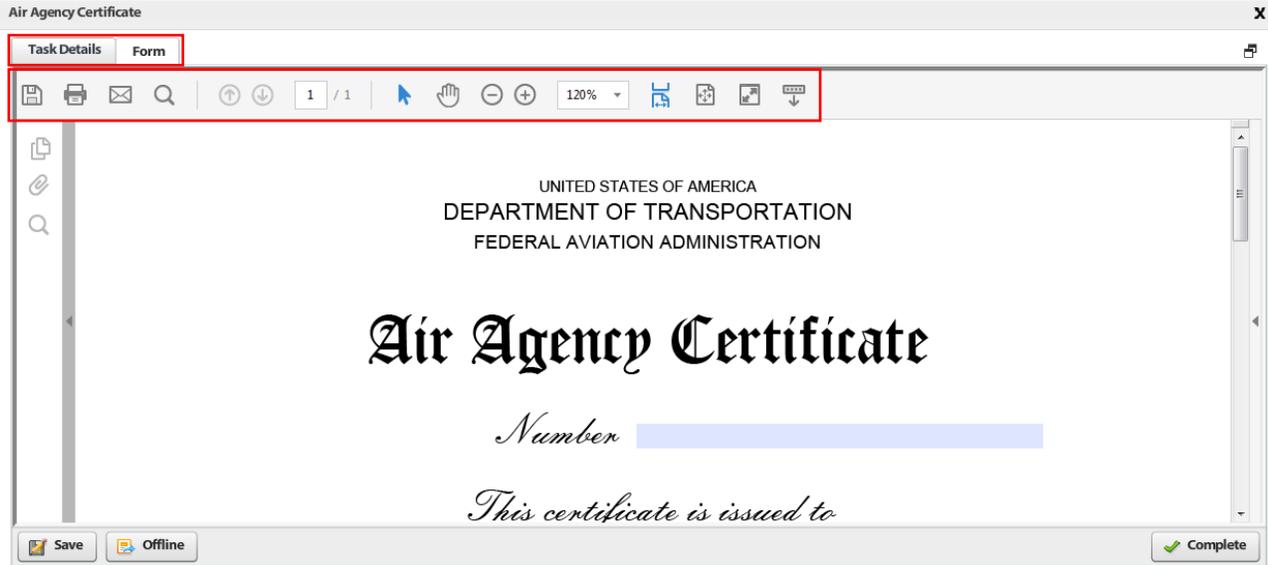


7.2 Display Options

7.2.1 Create More Room to See the Form

To create more room to see the form, you can hide the following toolbars.

- [Form Tabs](#)
- [Form Toolbar](#)



7.2.2 Hide/Show Form Tabs

To increase the visible area of the form, click the Maximize/Minimize button  on the right side of the Form Tabs. Click the button again to reduce the form to its previous size as necessary.



7.2.3 Hide/Show Form Toolbar

NOTE: Depending on the version of Adobe Acrobat or Reader you are using in your web browser, your toolbar views and options may differ from the examples shown here.

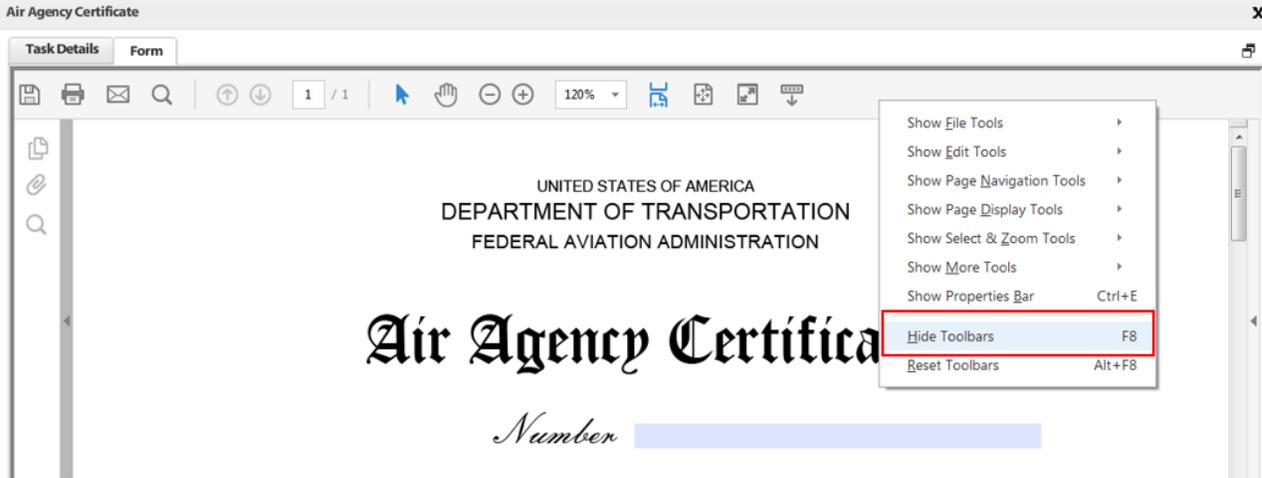
To hide or show the Form toolbar, follow the instructions below.



Hide Form Toolbar

To hide the Form Toolbar, right-click on a blank part of the toolbar and select "Hide Toolbars", or press the **F8** key on the keyboard.

NOTE: You can also right-click anywhere on the toolbar and select Show/Hide Toolbars > Hide Toolbars.



Show Form Toolbar

To display the Form Toolbar, click anywhere on the form and press the **F8** key on the keyboard.

7.3 Navigating Form Manager

7.3.1 Top Menu Bar

The menu bar is located at the very top of the Form Manager screen. It allows you to set your preferences, read system messages, get eForm Service help, and log out. The Menu Bar is shown below:



A brief description of the Top Menu Bar:

Preferences: Change your global preferences for the Form Manager. For more about setting your preferences see the [Setting My Preferences](#) Help topic.

Messages: These are notices of events that occur during your current session. The messages are about two types of events:

- System events, such as login and server errors
- Business process events, such as completion of a task and new tasks arriving in your Worklist

To sort the messages in ascending or descending order, click the Description column heading. Click **Exit Messages** to exit the page.

eForms Admin: This link is available only to internal AVS users who are authorized to perform various functions pertaining to the eForm Service (i.e. reporting, user account requests, etc).

Help: This option provides a link to eForm Service Help Topics and a link that displays system information about the AVS Form Manager.

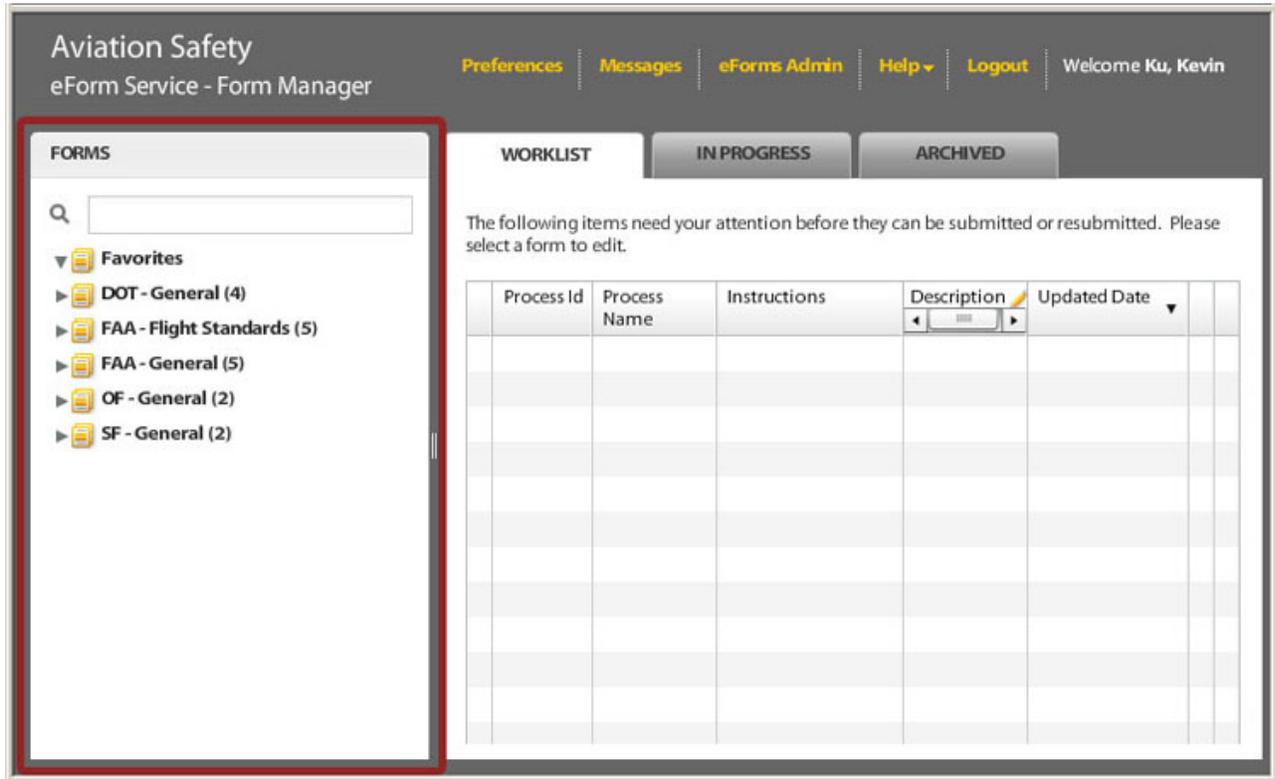
Logout: This option logs you out of the Form Manager. When selected, a confirmation window will appear, as shown below.



7.3.2 Form Directory Panel

Use the form directory panel on the left side of the Form Manager to browse for forms. This panel (see example below) displays forms in different categories and allows for easy organization of the forms.

NOTE: To open a form in any category, make sure to double-click on the form name instead of the star icon next to it. Clicking the star icon adds/removes the form to/from the Favorites category.



Searching for Forms

On top of the Form Directory Panel is a Search box to help you find the forms easily. Type the name of a particular form in the Search field and a list of all forms that match the search criteria will appear. As you type a character, any form that has that character in its name will appear until the search parameter is narrowed to the form you want.

Related Topics:

[Setting Favorites](#)

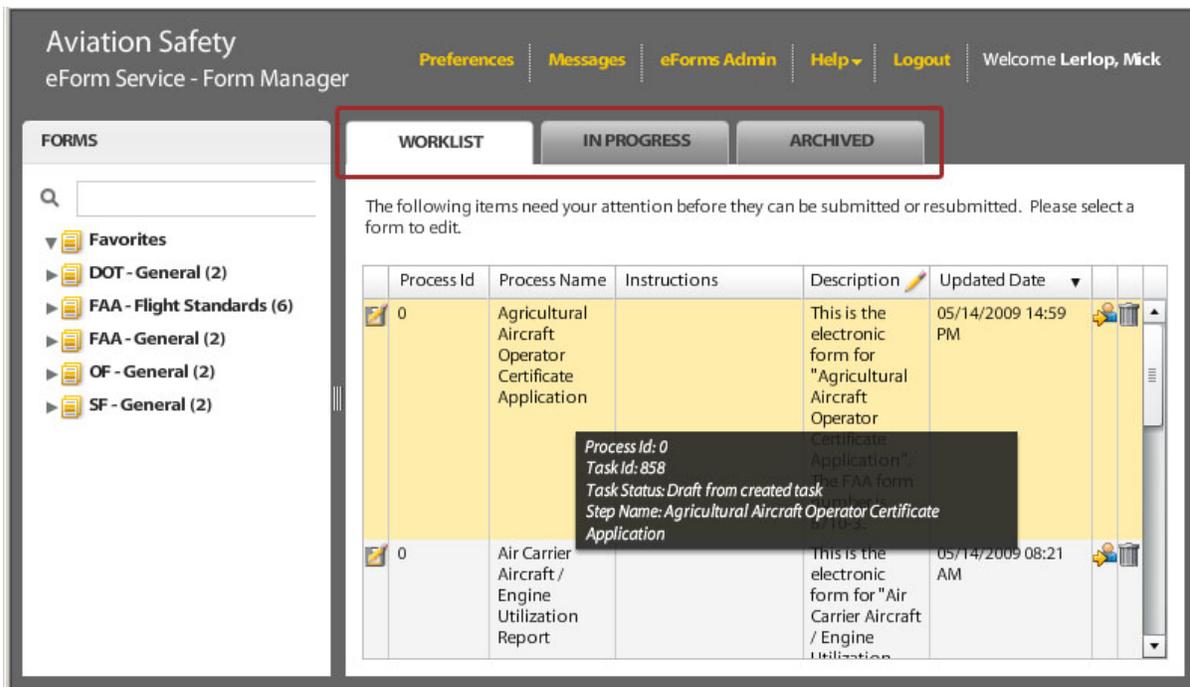
[Searching for a Form](#)

7.3.3 Form Manager Tabs

The Form Manager Tabs consist of the **Worklist** tab, **In Progress** tab, and **Archived** tab. These tabs help organize the forms in the workflow.

To view or process a form, position the mouse pointer over the task, which will also highlight it, and double-click to open the form. You can have only one form open at a time. Placing the mouse pointer over the task will also display a box containing information about that task.

To view the list in ascending or descending order, click on the corresponding column heading (such as by Process ID, Process Name, etc.) to rearrange the view as desired.



Worklist Tab

The Worklist tab (as shown in example above) lists active forms that need to be processed for either approval or rejection (if submitted to you as part of a workflow, i.e. the Form 337) or forms saved as draft and awaiting future editing. See the "[Worklist Overview](#)" Help topic for more details.

In Progress Tab

The In Progress tab lists the workflow forms that have an automated business process (i.e. the Form 337) and are currently in progress and waiting for review, approval, rejection, etc. These forms are read-only. See the "[In Progress Overview](#)" Help topic for more details.

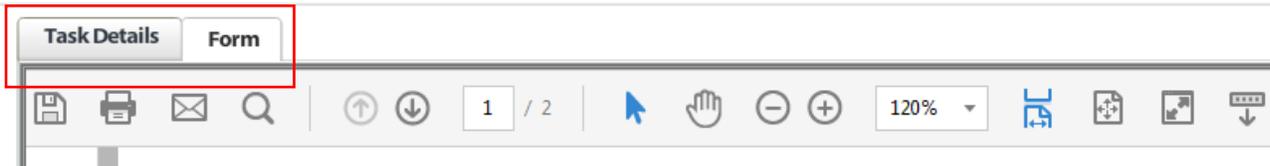
Archived Tab

The Archived Tab lists the completed Workflow forms that you submitted online. These are read-only copies of the form and cannot be edited. EForms without a workflow and are not associated with a tracking number may be edited when you create a new instance of the form. See the "[Archived Overview](#)" and "[Create a New Form](#)" Help topics for more details.

7.3.4 Form Tabs

The Form Tabs for most electronic forms consists of **Task Details** and **Form**. The **Attachments** tab is not available on all forms; this tab will appear only on forms that allow the attachment of files or notes with the form submission.

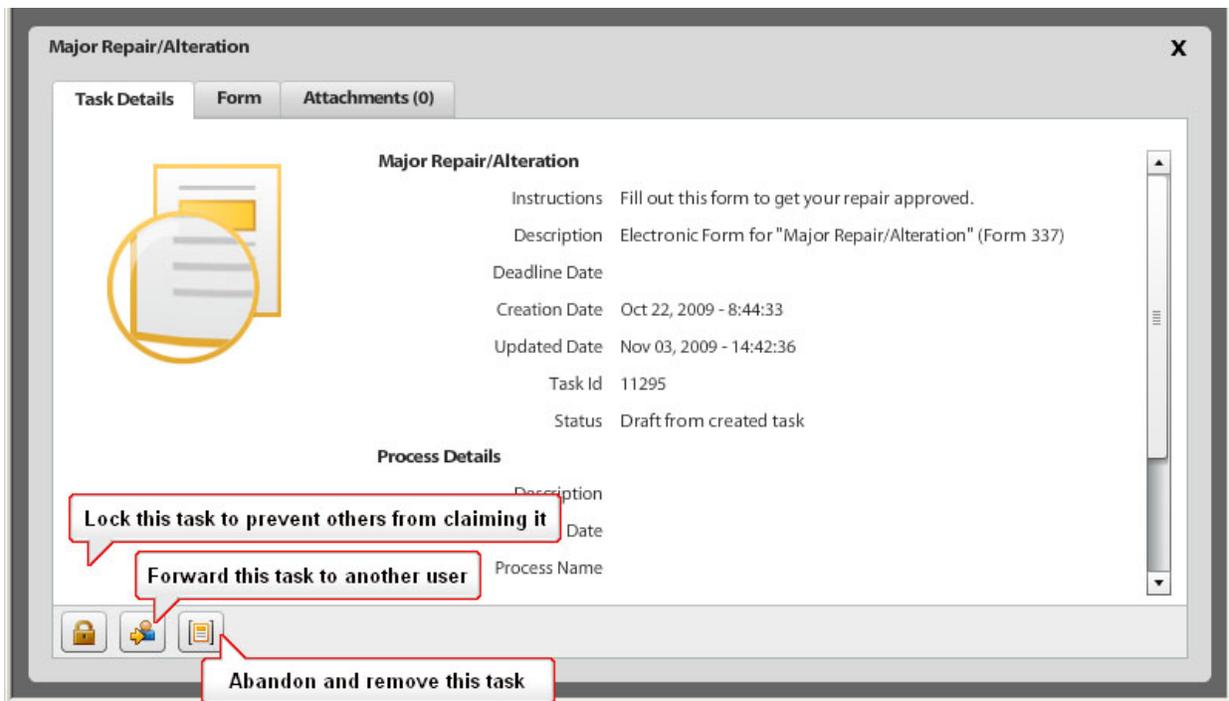
NOTE: Forms that allow the user to forward a task to someone else will also display a **Forwarding** tab on the Form Tabs.



Task Details

The Task Details tab displays general information about the type of task and specific information about the current task and process.

On the bottom of the tab window are icons that allow you to lock/unlock the task, forward the task (if applicable) to another user, or abandon and delete the task from your worklist.

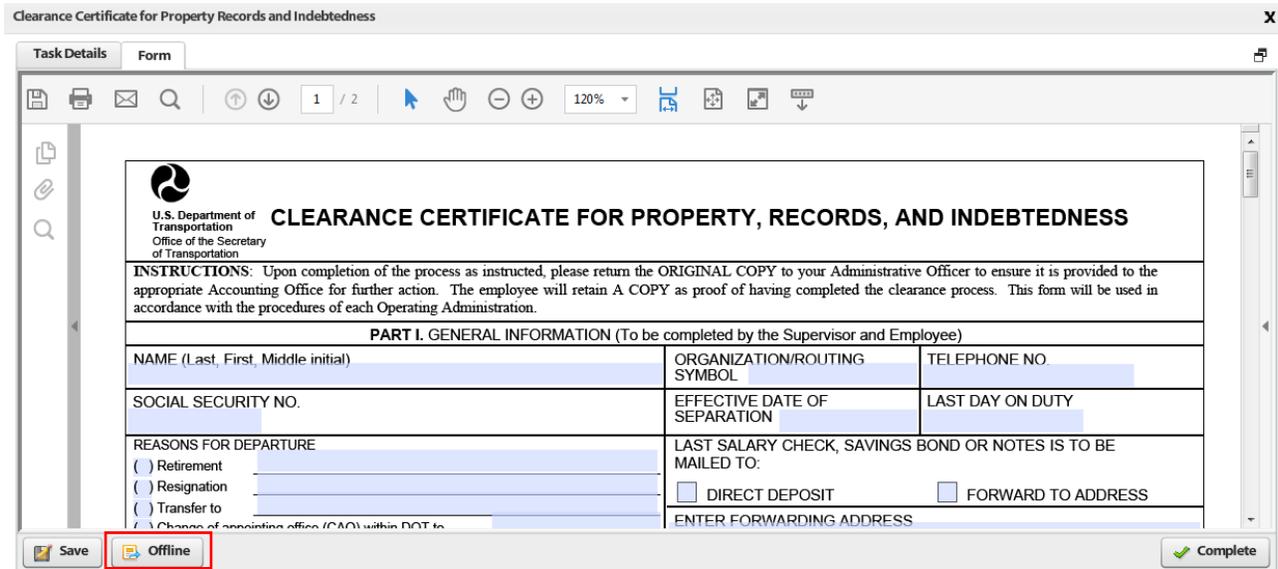


Form

The form displays in .pdf format and process buttons are provided on the bottom of the window.

The **Save to Worklist (Draft)** button  on the lower-left corner allows you to save the form and complete it later. See the "[Saving to Worklist \(Draft\)](#)" Help topic for more details.

The **Take this Form Offline** button  allows you to save a copy of the form on your computer or an external device.



Clearance Certificate for Property Records and Indebtedness

Task Details Form

U.S. Department of Transportation
Office of the Secretary of Transportation

CLEARANCE CERTIFICATE FOR PROPERTY, RECORDS, AND INDEBTEDNESS

INSTRUCTIONS: Upon completion of the process as instructed, please return the ORIGINAL COPY to your Administrative Officer to ensure it is provided to the appropriate Accounting Office for further action. The employee will retain A COPY as proof of having completed the clearance process. This form will be used in accordance with the procedures of each Operating Administration.

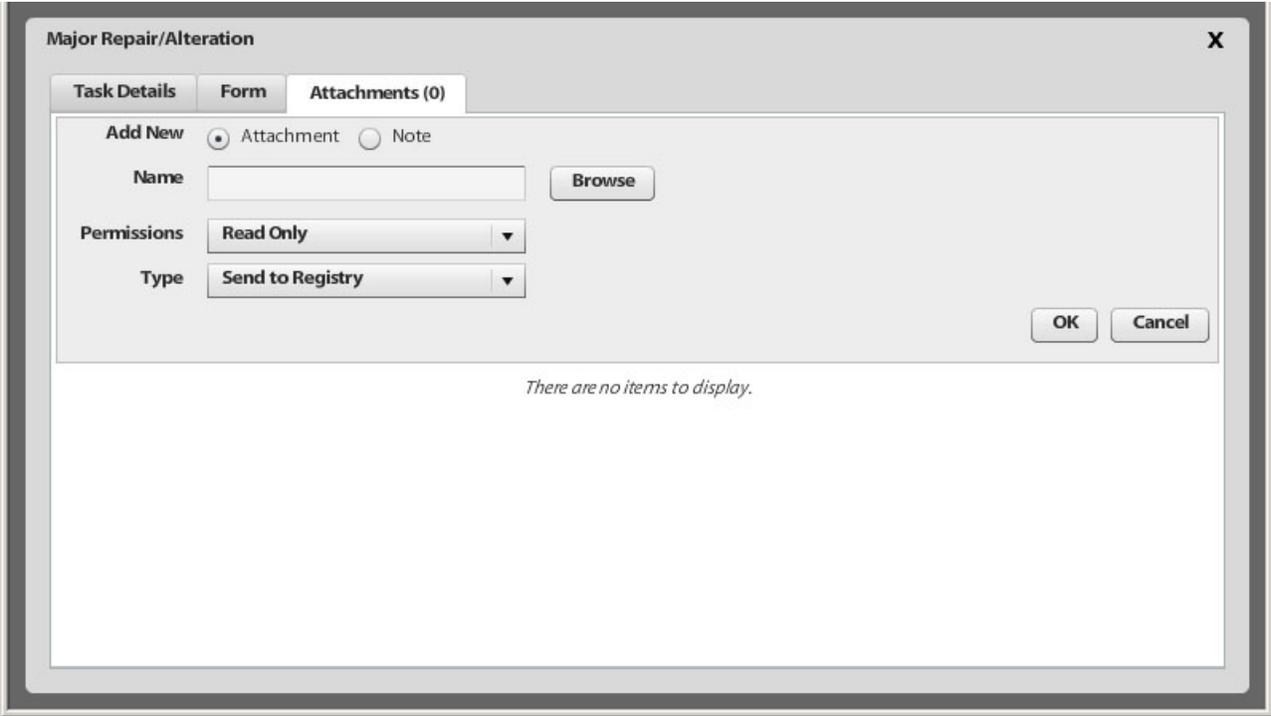
PART I. GENERAL INFORMATION (To be completed by the Supervisor and Employee)

NAME (Last, First, Middle initial)	ORGANIZATION/ROUTING SYMBOL	TELEPHONE NO.
SOCIAL SECURITY NO.	EFFECTIVE DATE OF SEPARATION	LAST DAY ON DUTY
REASONS FOR DEPARTURE <input type="checkbox"/> Retirement <input type="checkbox"/> Resignation <input type="checkbox"/> Transfer to <input type="checkbox"/> Change of appointment office (CAO) within DOT to	LAST SALARY CHECK, SAVINGS BOND OR NOTES IS TO BE MAILED TO: <input type="checkbox"/> DIRECT DEPOSIT <input type="checkbox"/> FORWARD TO ADDRESS	
ENTER FORWARDING ADDRESS		

Save Offline Complete

Attachments

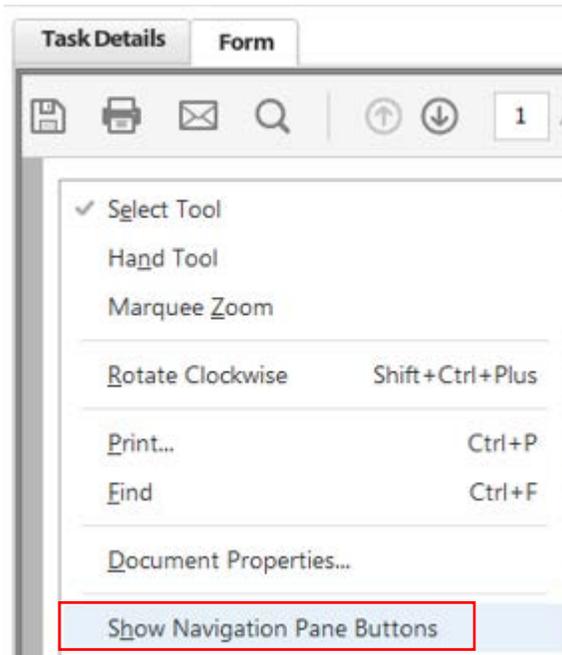
You can add notes and file attachments to a form if the process allows it. Other users who participate in the process can view, update, and delete the notes or attachments if you provide permission. For more details, see the Help Topic for specific forms that have this feature.



The screenshot shows a software window titled "Major Repair/Alteration" with a close button (X) in the top right corner. The window has three tabs: "Task Details", "Form", and "Attachments (0)". The "Attachments (0)" tab is active. Inside this tab, there is a section for "Add New" with two radio buttons: "Attachment" (selected) and "Note". Below this are three input fields: "Name" with a "Browse" button, "Permissions" with a dropdown menu set to "Read Only", and "Type" with a dropdown menu set to "Send to Registry". At the bottom right of this section are "OK" and "Cancel" buttons. Below the input fields, a message reads "There are no items to display."

7.3.5 Form Navigation Pane

The Form Navigation Pane adds more functionality to the electronic Forms. To show or hide the Navigation Pane, right-click on the left side of the window and select “Show Navigation Pane Buttons” or “Hide Navigation Pane Buttons”. By default, only a selected set of these buttons appears on the left side of the work area. Click the buttons to show or hide the views.



7.4 Form Manager Tools

7.4.1 Overview

The LiveCycle Form Manager enables the use of the web browser to find, organize, and process eforms. Use LiveCycle Form Manager to perform the following tasks:

- Open and fill out forms in the web browser
- Find forms quickly and easily
- Reuse forms that were previously completed
- Customize the presentation of forms

With LiveCycle Form Manager (see example below), the user can also initiate online routing and automated processing of .pdf forms within the user's organization.

Aviation Safety
eForm Service - Form Manager

Preferences Messages eForms Admin Help Logout Welcome Ku, Kevin

FORMS

WORKLIST IN PROGRESS ARCHIVED

The following items need your attention before they can be submitted or resubmitted. Please select a form to edit.

Process Id	Process Name	Instructions	Description	Updated Date
0	FAA Employee Suggestion		FAA 3450-17 titled "FAA Employee Suggestion"	11/16/2009 08:32 AM
0	Bird / Other Wildlife Strike Report		This is the electronic form for "Bird / Other Wildlife Strike Report". The FAA form number is 5200-7.	09/17/2009 10:00 AM

7.4.2 Setting Preferences

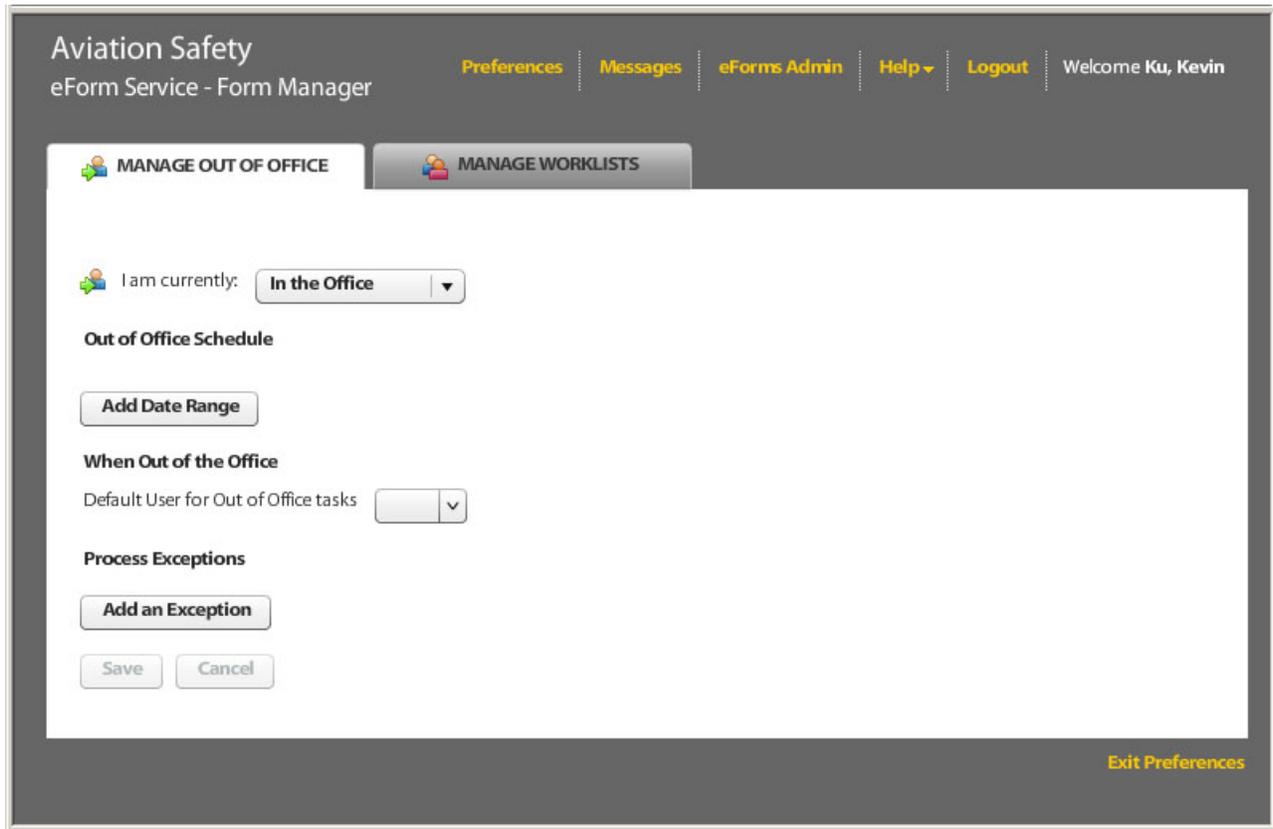
Preferences allows customization of the Form Manager for personal viewing. This feature is divided into two categories:

- Manage Out of Office
- Manage Worklists

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7.4.2.1 Manage Out of Office

Set preferences to control how your tasks are assigned to other people while you are out of the office. In your absence, you allow others to process or complete forms on your behalf (i.e. approve or reject for the Form 337 process). You can also specify exceptions for tasks from specific processes to be sent to another user or remain in your worklist until you return.



To specify when you are out of the office, do one of the following options:

- If you are out of the office for an indefinite time period, select **Out of the Office** but do not add a date range
- To specify a start date and time that you will be out of the office, select **Out of the Office** and click **Add Date Range**

To specify how your tasks will be handled by default, select one of the following options:

- Select **Do not assign** to keep tasks in your worklist until you return
- Select **Find User** to search for a user to assign your tasks. When you select a user, you can also view their out-of-office schedule

To set exceptions to the default, click **Add an Exception** and select a specific form to assign to a specific user as necessary.

Click **Save** when you have finished setting your preferences.

Click **Exit Preferences** on the bottom right corner of the tab window when finished.

7.4.2.2 Manage Worklists

Share my worklists

Selecting **Share my worklists** allows you to provide any number of people with access to your worklist.

NOTE: Only new draft forms or new assigned tasks (i.e. Form 337) can be viewed in a Worklist AFTER an Out of Office or Manage Worklist preference setting has been established.

NOTE: Due to privacy issues, Human Resource/Personnel type forms cannot be shared.

The form disappears from your worklist when the user to whom you have given access opens the form. That user becomes the owner of the form until it is forwarded to another user.

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eForm Service - Form Manager

Preferences Messages eForms Admin Help Logout Welcome Ku, Kevin

MANAGE OUT OF OFFICE MANAGE WORKLISTS

Share my worklist Access another worklist

Name: Find

Name	Email

Share with: Share

Users currently sharing my worklist:

Name

Exit Preferences

To share your worklist, do the following:

1. Select **Share my worklist**.
2. Type the name or partial name of the user in the Name text box.

NOTE: You can enter either the first name or the last name (not both) or the format of (lastname, firstname). User name is not case-sensitive.

3. Click **Find** to list all of the user names that match the search criteria.
4. Select the name of the user and click **Share** or double-click the user name. A list of users who are currently sharing your worklist will appear on the right side of the page.

- To delete the name of users from the list, select the name from the **User Currently Sharing My Worklist** window and click **Remove** on the bottom right of the list window.

Access another worklist

Selecting **Access another worklist** allows you to submit a request to access another worklist and displays a list of worklists in which you have access.

The screenshot shows the 'Aviation Safety eForm Service - Form Manager' interface. At the top, there are navigation links: Preferences, Messages, eForms Admin, Help, Logout, and a welcome message 'Welcome Ku, Kevin'. Below this, there are two main tabs: 'MANAGE OUT OF OFFICE' and 'MANAGE WORKLISTS'. Under 'MANAGE WORKLISTS', there are two radio buttons: 'Share my worklist' and 'Access another worklist'. The 'Access another worklist' option is selected and highlighted with a red box. Below the radio buttons is a 'Name:' text input field with a 'Find' button to its right. Underneath the input field is a table with two columns: 'Name' and 'Email'. Below this table is an 'Access to:' text input field with a 'Request' button to its right. On the right side of the interface, there is a section titled 'Users worklists that I have access to:' with a table that has a 'Name' column. Below this table, there is a note: '*-denotes request is pending'. At the bottom right of the interface, there is a link for 'Exit Preferences'.

To access another worklist, do the following:

- Select **Access another worklist**.
- Type the name or partial name of the user in the **Name** text box whose worklist you want to access.

NOTE: You can enter either the first name or the last name (not both) or the format of (lastname, firstname). User name is not case-sensitive.

- Click **Find** to list all user names that match the search criteria.
- Select the name of the user and click **Request**. A list of users whose worklist you will have access to will appear on the right side of the page.

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- To remove your access to another worklist, select the user name from the **Users Worklist That I have Access To** list and click **Remove** on the bottom right of the list window.

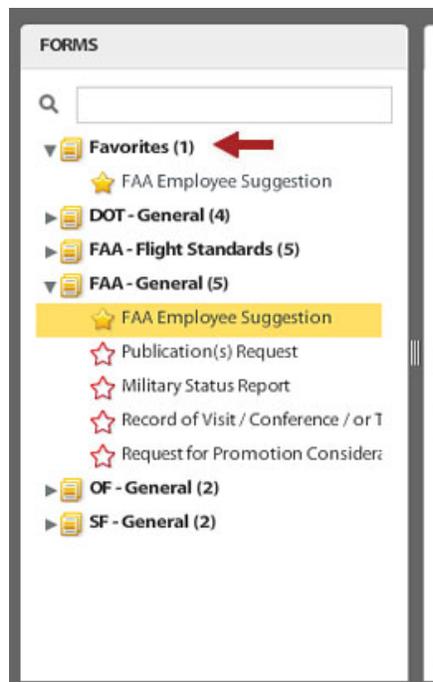
NOTE: You cannot remove your access to another worklist when the request to access the worklist is still pending.

7.5 Form Categories

7.5.1 Setting Favorites

The Favorites category (see example below) is in the Form Directory Panel, located on the left side of the Form Manager window.

By setting favorites, you can group all the forms that are used frequently into a single category so that you can find them quickly.



7.5.1.1 Adding and Removing Forms in the Favorites Category

- Select the category that contains the form.
- Click the hollow star icon ☆ next to the form name. The form is added to your Favorites category, and a solid star ★ appears next to the form to indicate that the form is a favorite.
- To remove a form from the Favorites category, click the star again. The form appears in its original category with a hollow star next to the name.

NOTE: Be sure to click on the star icon; accidentally double-clicking on the form name will open the form.

7.5.2 Worklist

7.5.2.1 Worklist Overview

The **Worklist** tab displays a list of active forms that are still in process. It could include forms that are sent to you as part of an automated workflow and need to be processed for approval or rejection (i.e. a Form 337), or forms that were saved for future editing or completion.

NOTE: To view the list in ascending or descending order (such as by Process ID, Process Name, etc.), click on the corresponding column heading to rearrange the view as desired.

Process Id	Process Name	Instructions	Description	Updated Date
850	Major Repair/Alteration	Ku, Kevin submitted a Form 337 for your approval. (Tracking #: ...)		08/12/2008 15:15 PM
851	Major Repair/Alteration			08/08/2008 14:31 PM
0	Major Repair/Alteration	Fill out this form to get your repair approved.	Form 337	07/24/2008 10:06 AM

Open a Form in the Worklist Tab

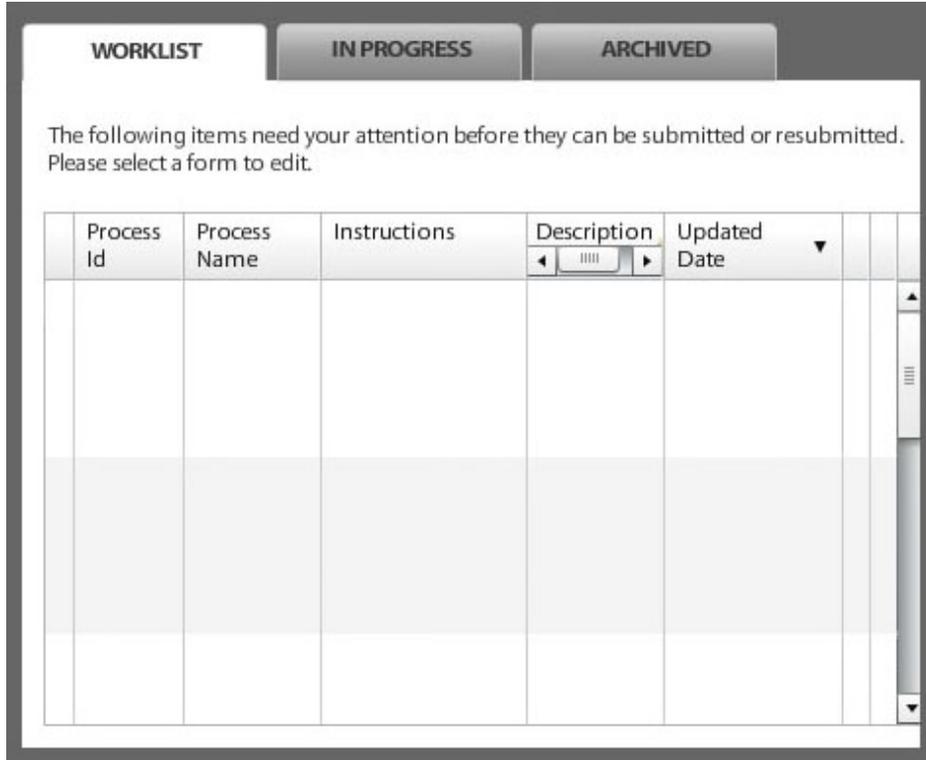
To view or process a form, position the mouse pointer over a task, which will also highlight it, and double-click to open the form. Placing the mouse pointer over the task will also display a box containing information about that task. A .pdf copy of the form will open in the same window. You can have only one form open at a time.

Forward a Form in the Worklist Tab

If the process allows it, you can choose to forward a form to another user by clicking on the Forward icon . Refer to [Forwarding a Task](#) for further details.

7.5.2.2 Worklist Columns

The Worklist page displays all forms that require some action and consists of columns that show the process ID, name, instructions for the task, form/task description, and date the form was last updated.



Process ID: Unique technical (system) ID number that identifies each form upon execution of a process. It is "0" (zero) until the first time the Complete button is clicked in the form user interface.

Process Name: Name of the form or process.

Instructions: Any instructions needed to process the form.

Description: Description of the form/workflow process.

Updated Date: The date the process was last updated.

7.5.2.3 Change Task Description in Worklist

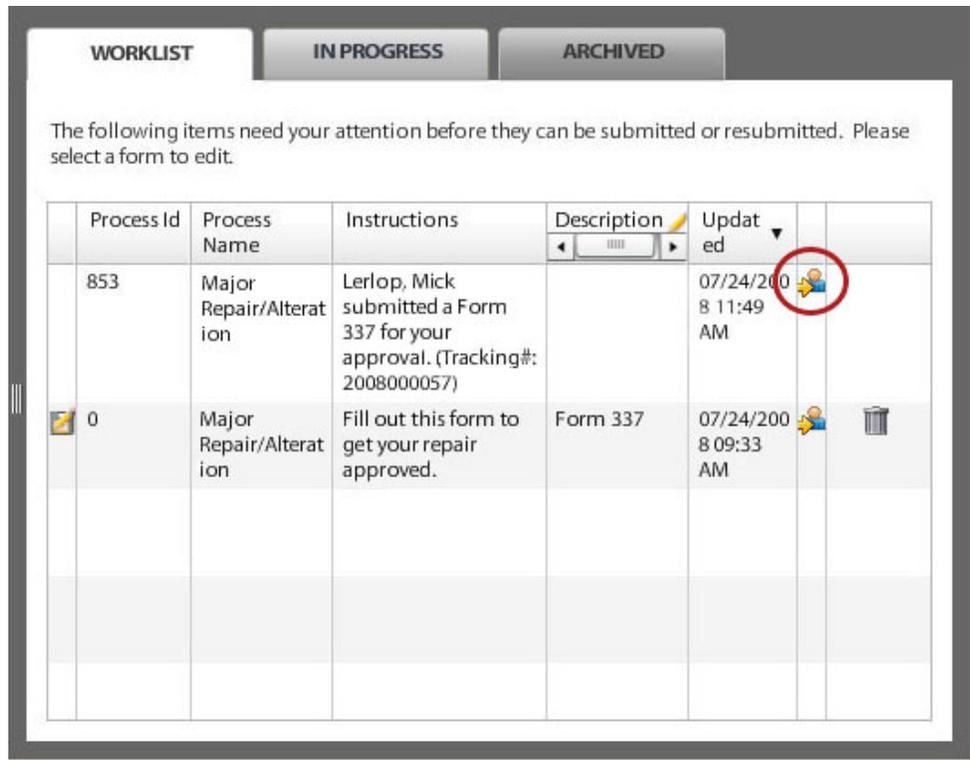
The description for each form or task can be changed (or added) while in **Worklist** view.

NOTE: This description is used for organizing your own Worklist and does not go with the task when it is sent to the next stage of the process. The only exception is when the task is forwarded to another user since the description stays only with forwarded tasks.

Refer to [Changing Task Description in Worklist View](#) Help Topic in the **Working with the Form** category to change the description for a form or task in the Worklist view.

7.5.2.4 Forward a Form

While in the Worklist tab, you can forward a form or task to another user by clicking on the Forward icon  (see example below). Refer to [Forwarding a Form](#) for further details.



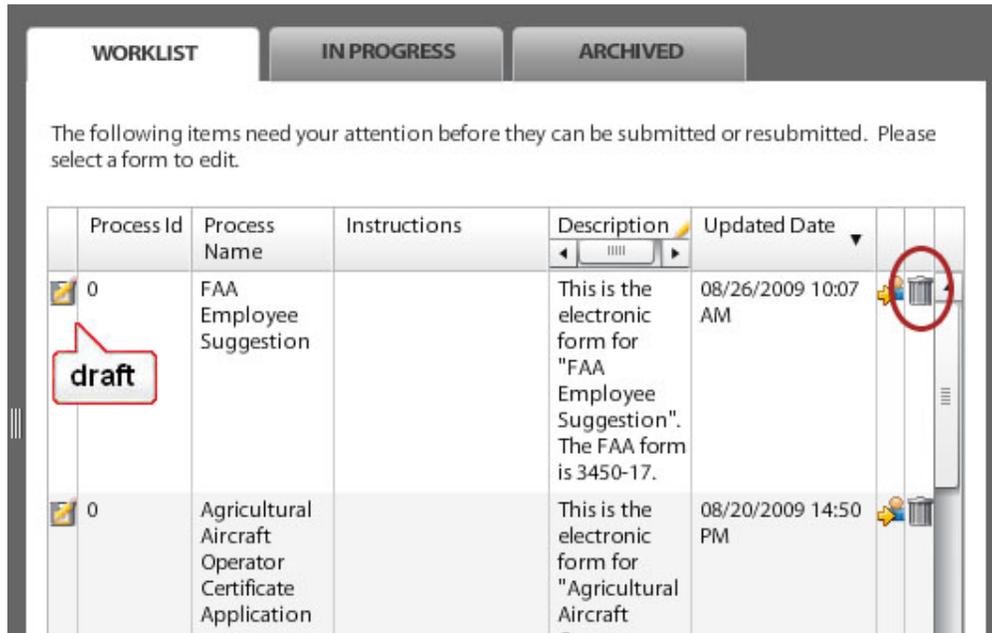
Related Topics:

[Forwarding a Form](#)

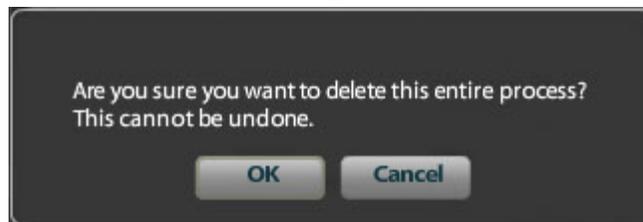
7.5.2.5 Delete a Draft Form

NOTE: Only the author of the form can delete a draft form.

A form that was saved to Draft will appear on the Worklist with a  icon to the left of the form (see example below). To delete the draft form, simply click on the trash icon to the right of the form. Note that this action cannot be undone.



After clicking the trash icon, a confirmation box appears, as shown below. Click **OK** when ready or **Cancel** to return to the Worklist.



7.5.3 In Progress

7.5.3.1 Overview

The **In Progress** tab lists forms that are in progress but not finalized. Each item can be identified by the unique Process ID. Double-clicking on any of the items on the list will display two tabs: **Process Details** and **Audit**

NOTE: Users can view the Audit (History) under the In Progress tab for forms that have an automated business process (i.e. for Form 337).

To view the list in ascending or descending order (such as by Process ID, Tracking No., etc.), click on the corresponding column heading to rearrange the view as desired.

Process ID ▲	Tracking	Proces	Step Name	Assigned To	Updated Date
838		337	Assign to	Lerlop, Mick	07/23/2008 21:38 PM
839		337	Assign to	Lerlop, Mick	07/23/2008 21:44 PM
840		337	337 Component	Lerlop, Mick	07/23/2008 21:48 PM
841		337	Assign to	Lerlop, Mick	07/23/2008 21:51 PM
842		337	Assign to	Lerlop, Mick	07/23/2008 22:03 PM
843		337	Assign to	Lerlop, Mick	07/23/2008 22:07 PM
844		337	Assign to	Lerlop, Mick	07/23/2008 22:11 PM
850	2008000	337	Waiting RTS	Lerlop, Mick	08/12/2008 15:15 PM
851	2008000	337	Waiting RTS	Lerlop, Mick	08/08/2008 14:31 PM
853	2008000	337	Waiting RTS	Ku, Kevin	08/06/2008 13:47 PM

Process Details

On the Process Details tab, you can view basic details about the process instance, including its creation date, status, and other information regarding the task.

Process Details
Audit
X

Process Details

Description The Office of Aviation Safety (AVS) provides an electronic Form Service in support of the Government PaperWork Elimination Act (GPEA) and eGOV initiatives. Creating and submitting forms electronically greatly speeds up form processing as opposed to manual paper processing methods. The electronic FAA Form 337, which is available from this site, provides for the creation, submission and approval of the FAA Major Repair and Alteration in an effort to save time and effort in service to Industry customers and to promote Aviation Safety.

Creation Date Aug 27, 2008 - 9:19:22

Updated Date Aug 27, 2008 - 9:27:38

Process Name 337

Process Id 1802

Process Status Running

Process Variables

trackingNumber 2008001178

Current Pending Tasks

User	Instructions
Mechanic2	Mechanic1 submitted a Form 337 for your approval. (Tracking#: 2008001178)

Audit

On the Audit tab, you can view the tasks that are part of the process instance and the associated form, assignments, and attachments for each task.

Process Details
Audit
X

Select a Task to view the assignments, notes and attachments, and form data associated with it.

Tasks for Process Instance 1802

	Task Id	Instructions	Selected Route	Creation Date	Completion Date
	3508	Mechanic1 submitted a Form 337 for your approval. (Tracking#: 2008001178)		Aug 27, 2008 - 9:19:30	
	3507	Fill out this form to get your repair approved.		Aug 27, 2008 - 9:08:12	Aug 27, 2008 - 9:19:18

Notes and Attachments for Task

Assignments for Task

Form for Task

7.5.4 Archived

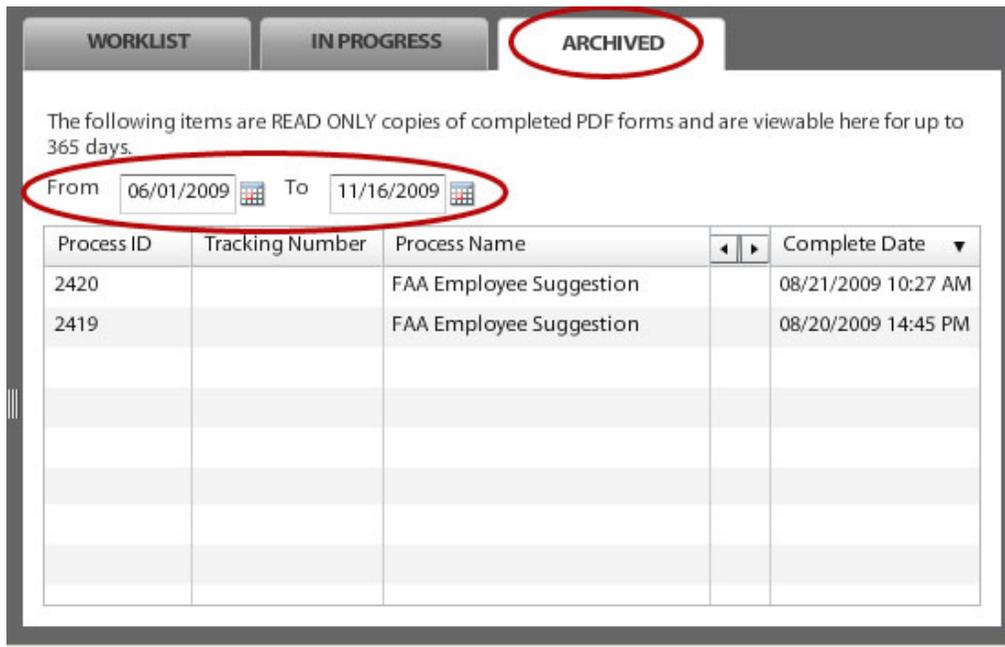
7.5.4.1 Overview

The **Archived** tab displays a list of eforms that you submitted. You can view the Audit (History) for all your completed forms under the Archived tab. **These forms are all read-only.** Archived copies are viewable for 365 days. By default, the page displays forms processed for the last 60 days, but you may click on the calendar icon  to perform a search as early as 365 days from the current date.

An example of the Archived tab is shown below. Double-clicking on any of the items on the list will display two tabs: **Process Details** and **Audit**

Any eForm that has been completed will appear under Archived. Hit the **F5** key to refresh the page as necessary. A Form 337 will appear under Archived only after it has been approved.

NOTE: To view the list in ascending or descending order (such as by Process ID, Task ID, etc.), click on the corresponding column heading to rearrange the view as desired.



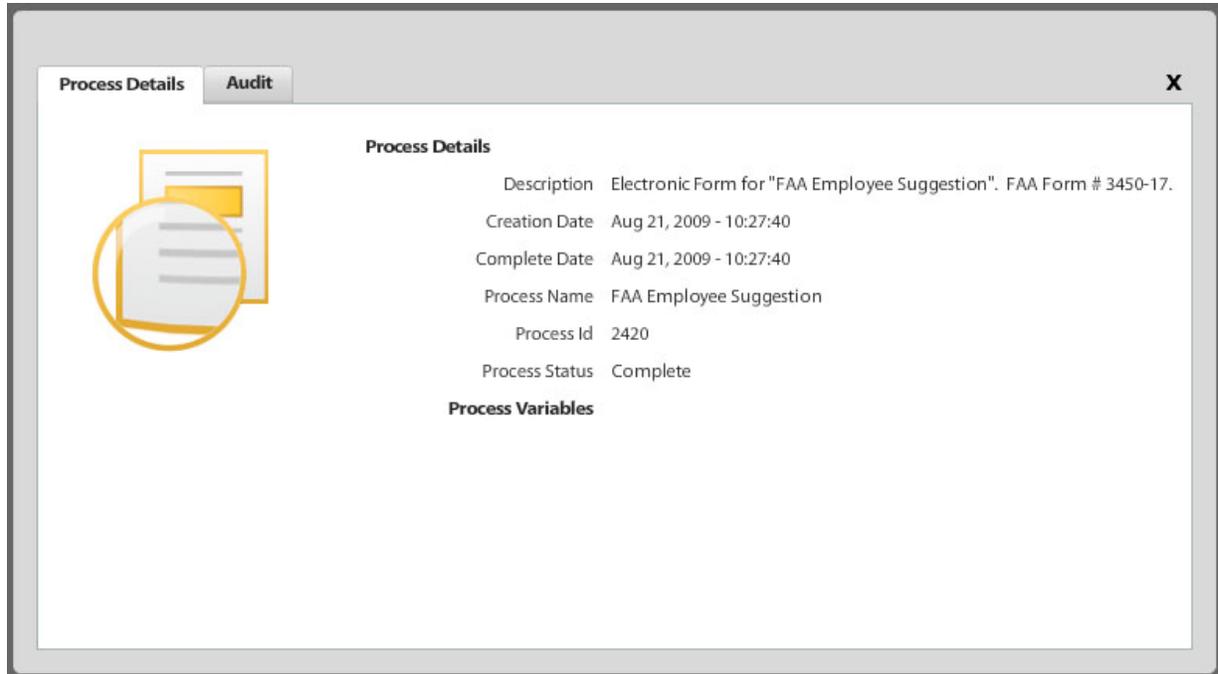
The following items are READ ONLY copies of completed PDF forms and are viewable here for up to 365 days.

From 06/01/2009  To 11/16/2009 

Process ID	Tracking Number	Process Name	Complete Date
2420		FAA Employee Suggestion	08/21/2009 10:27 AM
2419		FAA Employee Suggestion	08/20/2009 14:45 PM

Process Details

On the Process Details tab, you can view basic details about the process instance, including its creation date, status, and other information regarding the task.



Audit

On the Audit tab, you can view the tasks that are part of the process instance and the associated form, assignments, and attachments (if allowed by process) for each task.

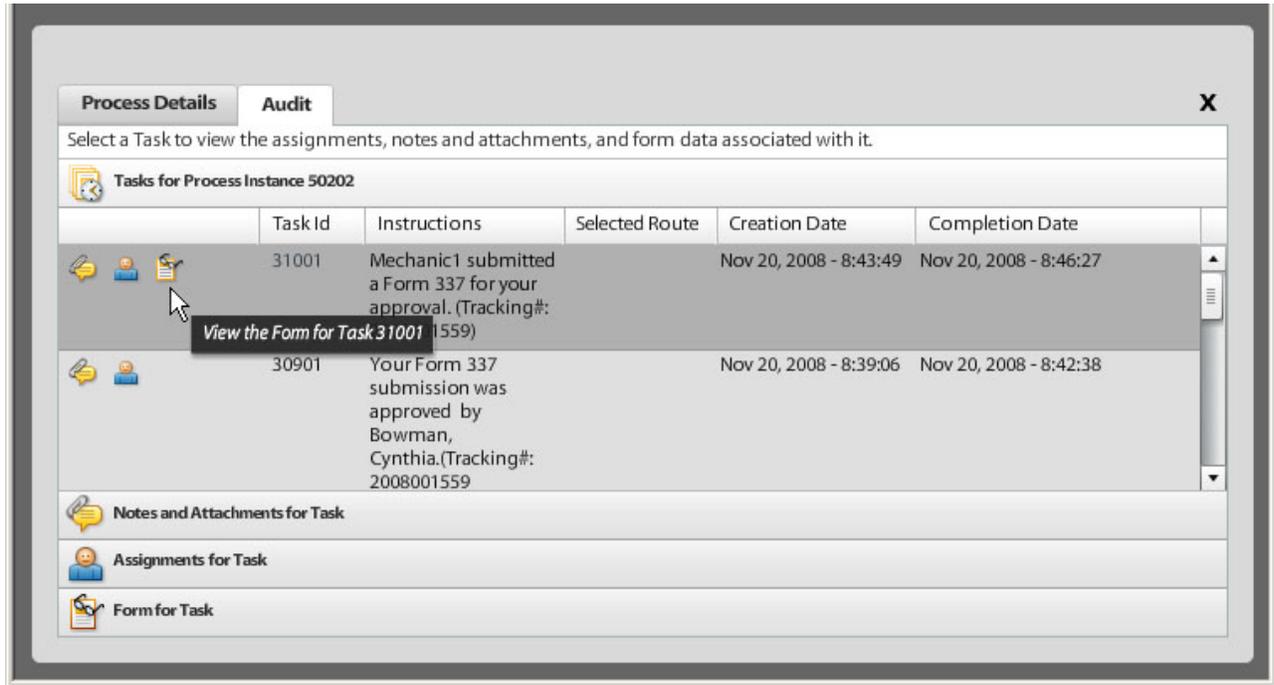
The screenshot displays the 'Audit' tab of a software application. At the top, there are two tabs: 'Process Details' and 'Audit'. Below the tabs is a search bar with the text 'Select a Task to view the assignments, notes and attachments, and form data associated with it.' Below the search bar is a section titled 'Tasks for Process Instance 2420'. This section contains a table with the following data:

Task Id	Instructions	Selected Route	Creation Date	Completion Date
2936			Aug 21, 2009 - 10:22:36	Aug 27, 2009 - 9:10:28

Below the table, there are three sections: 'Notes and Attachments for Task', 'Assignments for Task', and 'Form for Task'. Each section has a corresponding icon (a speech bubble, a person, and a document with a checkmark, respectively).

7.5.4.2 View Archived Form

To view a completed form in the Archived category, go to the Audit tab and click on the View Form icon  to open the form. Note that the form is read-only. You can also view the Assignments and the Notes and Attachments (if allowed by process) for each completed task by clicking and expanding the related icons in the Audit tab. See example below.



7.5.4.3 View Audit Trail

To view the audit trail for a completed form, click on a form in the Archived category and go to the Audit tab to see the workflow history. See example below.

The screenshot shows a software interface with two tabs: 'Process Details' and 'Audit'. The 'Audit' tab is active, displaying 'Selected Task 31001'. Below this, there is a section titled 'Tasks for Process Instance 50202' which contains a table with the following data:

Task Id	Instructions	Selected Route	Creation Date	Completion Date
31001	Mechanic1 submitted a Form 337 for your approval. (Tracking#: 2008001559)		Nov 20, 2008 - 8:43:49	Nov 20, 2008 - 8:46:27
30901	Your Form 337 submission was approved by Bowman, Cynthia.(Tracking#: 2008001559)		Nov 20, 2008 - 8:39:06	Nov 20, 2008 - 8:42:38
30512	Mechanic1 submitted. Approve	Approve	Nov 19, 2008 -	Nov 20, 2008 - 8:36:38

Below the table, there are sections for 'Attachments (1)', 'Assignments for Task 31001', and 'Form for Task 31001'. A red box highlights the table area.

7.5.4.4 Change Task Description in Archived

The description for each form or task can also be changed (or added) while in the **Archived** view, as well as the Worklist view.

NOTE: This description is used for organizing your Archived views and does not go with the task when it is sent to the next stage of the workflow process. The only exception is when the task is forwarded to another user since the description stays only with forwarded tasks.

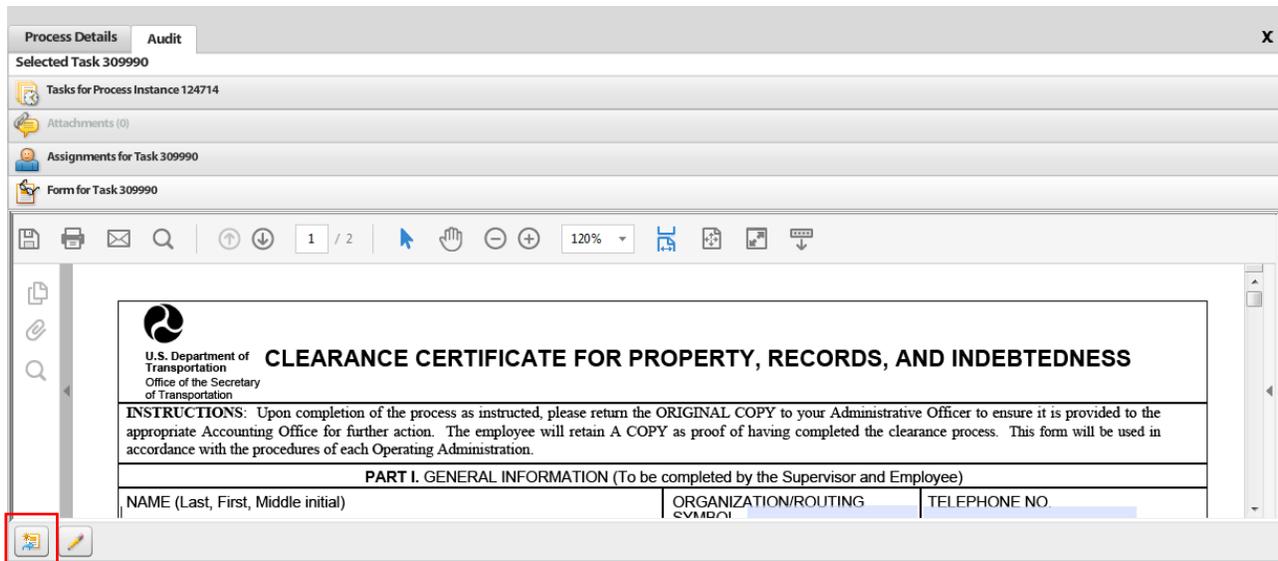
Refer to [Changing Task Description in Archived View](#) Help Topic in the **Working with the Form** category to change the description for a form or task in the Archived view.

7.5.4.5 Create a New Form

In the Archived category, a new instance of the form can be created from an existing form

by clicking the New Form icon  on the bottom left corner of the page. Data entries in the existing form may be retained as needed and all fields are editable.

NOTE: This function is not available for archived forms that were processed using a workflow, such as the Form 337, due to unique tracking numbers associated with the forms.



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7.6 Working with the Form

7.6.1 Form Manager Icons

The Adobe LiveCycle Form Manager will display several different icons that act as buttons to aid in the processing of the eForms. The definitions below will help you recognize the difference between each of the icons used in the eForm Workflow process. The use of these icons is also covered in various Help Topics that include more information about their function in the workflow.



Attachment - Save: This icon of a paperclip with blue down arrow is found under the Attachments tab. Click on this icon to save a file attachment to your computer or an external device. Some electronic forms may not have the Attachment feature.



Attachment - Update: This icon of a paperclip with a blue up arrow is found under the Attachments tab. Click on this icon to upload an updated file attachment to the form. Some electronic forms may not have the Attachment feature.



Audit - View Assignments: This icon is found in the Audit view of a task under the In Progress tab and the Archived tab. Click on this icon to view the assignments for the task.



Audit - View Attachments: This icon is found in the Audit view of a task under the In Progress tab and the Archived tab. Click on this icon to view the attachments for the task.



Audit - View Form: This icon is found in the Audit view of a task under the In Progress tab and the Archived tab. Click on this icon to view the form for the task.



Claim task and make it your own: This icon of an open lock is found under the Task Details tab of a shared task. Click on this icon to claim the task and add it to your own Worklist for future work.



Claim and open task: This icon of an open lock with a blue right arrow is found under the Task Details tab of a shared task. Click on this icon to claim and open the task for immediate attention.



Delete: This trash can icon is found in the Worklist view and the Attachments tab. Click on this icon to delete a task or attachment. Only the initiator of the form or the attachment can perform this function.

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Edit: This pencil icon is found in the Worklist view and in the Audit view of a task under the Archived tab to allow change of the task description.



Favorites - Add: This hollow star is found in the Directory Panel. Click on this icon to add a form in the Favorites category.



Favorites - Remove: This solid star icon is found in the Directory Panel. Click on this icon to remove a form from the Favorites category.



Forwarding: This icon is found in the Worklist view and Task Details tab. Click on this icon to forward a task to another user. In the Forwarding tab, this icon (with green arrow) appears next to the name of the user who will receive the forwarded task.



Lock: This lock icon is found under the Task Details tab. Click on this icon to lock the task and prevent others from claiming it.



Remove Task: This icon is found under the Task Details tab. Click on this icon to abandon the task and remove it from the Worklist view.



Return Task: This icon is found under the Task Details tab and appears for a form that had been forwarded to you. Click on this icon to return the task to the previous user.



Save to Worklist (Draft): This icon is found under the Form tab to allow saving of a draft copy of the form for future editing. The same icon will also appear next to the form on the Worklist view, identifying that form/task as a saved draft.



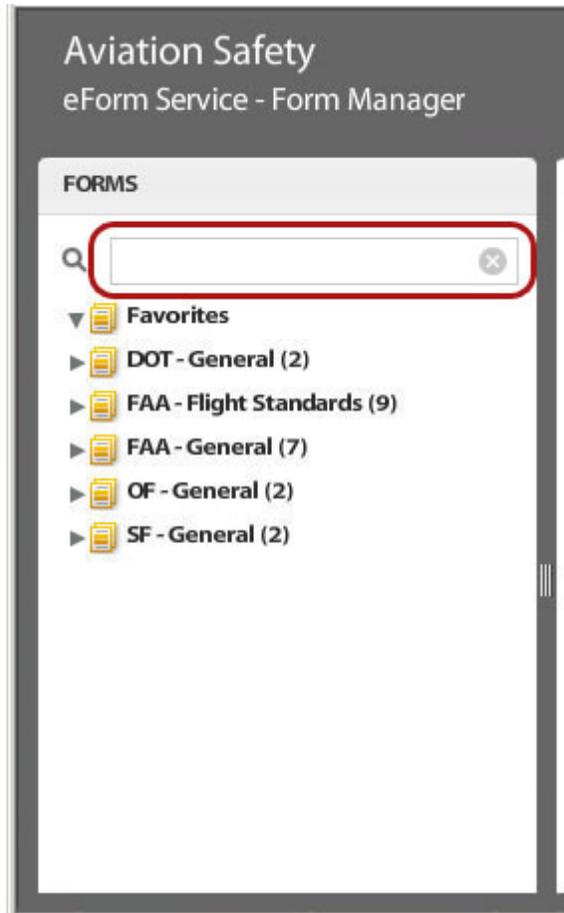
Share(d) Task: In the Worklist view, this icon represents a shared task. In the Task Details tab, click this icon to share the task with another user.



Take Form Offline: This icon is found under the Form tab. Click on this icon to save a copy of the form on the computer or an external device.

7.6.2 Searching for a Form

On top of the Form Directory Panel is a Search box to help you find the forms easily. Type the name of a particular form in the Search field and a list of all forms that match the search criteria will appear. As you type a character, any form that has that character in its name will appear until the search parameter is narrowed to the form you want. Click the "x" button to the right of the box to exit the search.



7.6.3 Opening a Form

You can open a new form from the Form directory Panel on the left side of the window or an existing form from any of the Form Manager tabs on the right side of the window. See example of Form Manager below.

The screenshot shows the AVS eForm Service interface. On the left is the 'FORMS' directory panel, and on the right is the 'WORKLIST' panel. The 'WORKLIST' panel has tabs for 'WORKLIST', 'IN PROGRESS', and 'ARCHIVED'. Below the tabs, a message states: 'The following items need your attention before they can be submitted or resubmitted. Please select a form to edit.' Below this message is a table with the following data:

Process Id	Process Name	Instructions	Description	Updated Date
0	FAA Employee Suggestion		This is the electronic form for "FAA Employee Suggestion". The FAA form is 3450-17.	08/26/2009 10:07 AM
0	Aircraft Operator Certificate Application		This is the electronic form for "Agricultural Aircraft Operator Certificate Application". The FAA form number is 8710-3.	08/20/2009 14:50 PM

A tooltip is displayed over the first row of the table, containing the following text:

```
Process Id: 0
Task Id: 2945
Task Status: Draft from created task
Step Name: FAA Employee Suggestion
```

Opening a New Form

In the Directory Panel on the left side of the window, open a new form in any category by double-clicking on the form name rather than the star icon next to it. Clicking the star icon adds/removes the form to/from the Favorites category.

Opening an Existing Form

Position the mouse pointer on an existing form to highlight it and double-click to open it.

NOTE: Placing the mouse pointer over a task will also display a black box with detailed information about the task (see example above).

7.6.4 Completing a Form

1. To fill out the form, place the mouse cursor in each field or use the tab key to advance to the next field as necessary. When ready, click the **Complete** button on the right bottom corner of the window. The completed form will be saved to the [Archived](#) system.
2. To exit the form, click the **X** button on the top right corner of the page to exit the form view.
3. A dialog box appears to confirm whether or not you want to close the form and alerts you to save any changes made. Click **OK** when ready.



4. The completed form will appear under the **Archived** tab. Hit **F5** key to refresh the screen as necessary.

The following items are READ ONLY copies of completed PDF forms and are viewable here for up to 365 days.

From 04/08/2012 To 06/07/2012

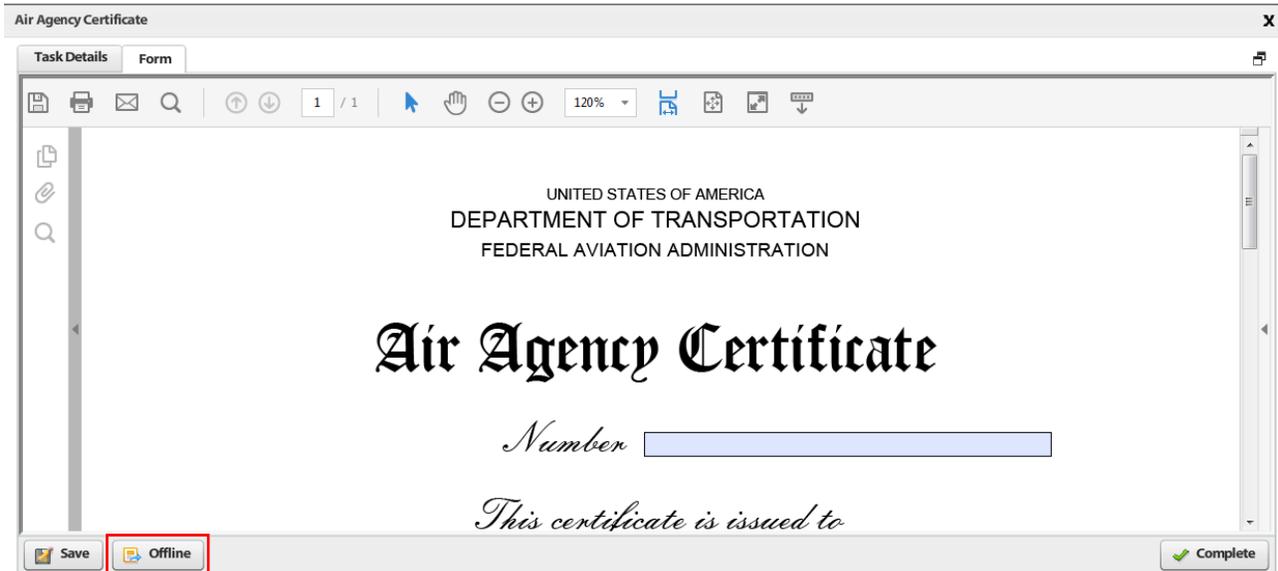
Process ID	Tracking Number	Process Name	Description	Complete Date
9316		Air Agency Certificate	FAA 8000-4 titled "Air Agency Certificate"	06/07/2012 10:43 AM

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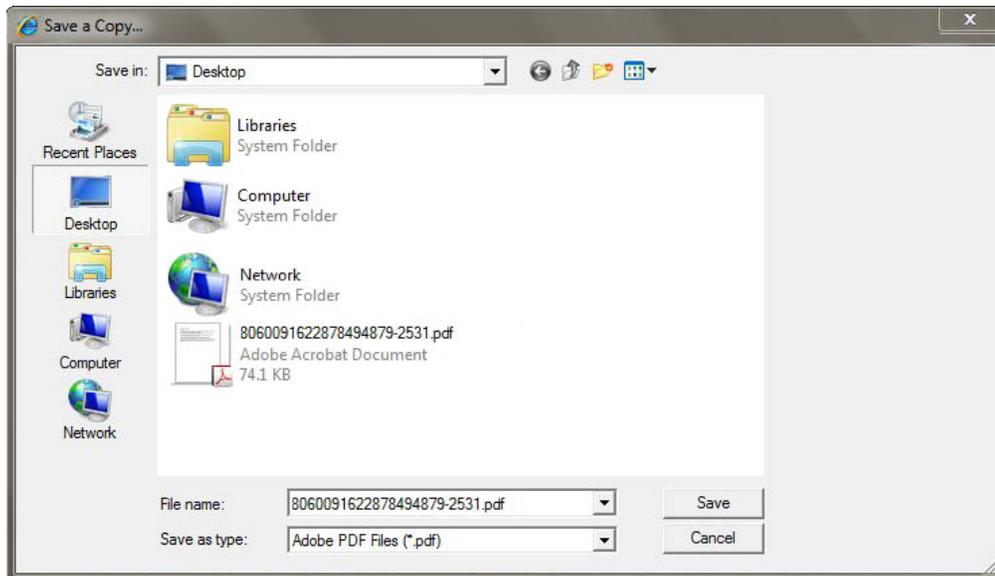
7.6.5 Saving a Form Offline

To save the form to the hard drive or external device, click on the 'Take this form offline' button (as shown below). This takes the form outside of the user interface.

IMPORTANT: Copies of forms saved Offline cannot be uploaded (saved) back to the Form Manager Worklist.



The 'Save a Copy' box appears to allow you to save the form as a .pdf file only. Choose the location to save the file, type in a file name, and click the **Save** button.

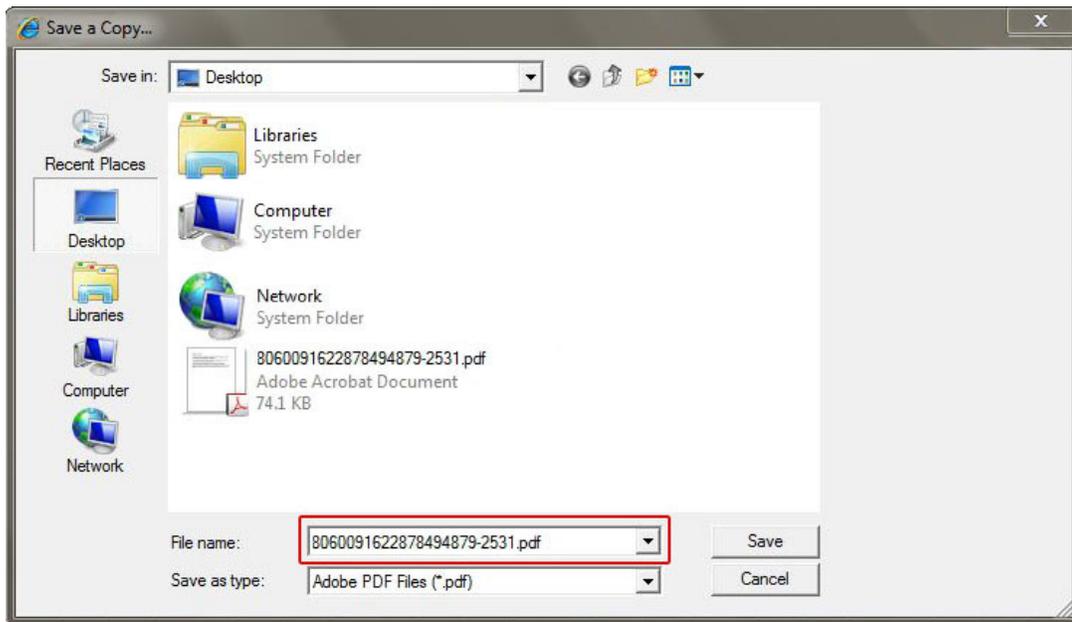


Related Topic:

[Saving a Form to PDF](#)

7.6.6 Saving a Form to PDF

To save the form in .pdf format, click the **Save** icon  on the tool bar above the form. In the **Save a Copy** dialog box, rename the file as necessary and save to a preferred file location.



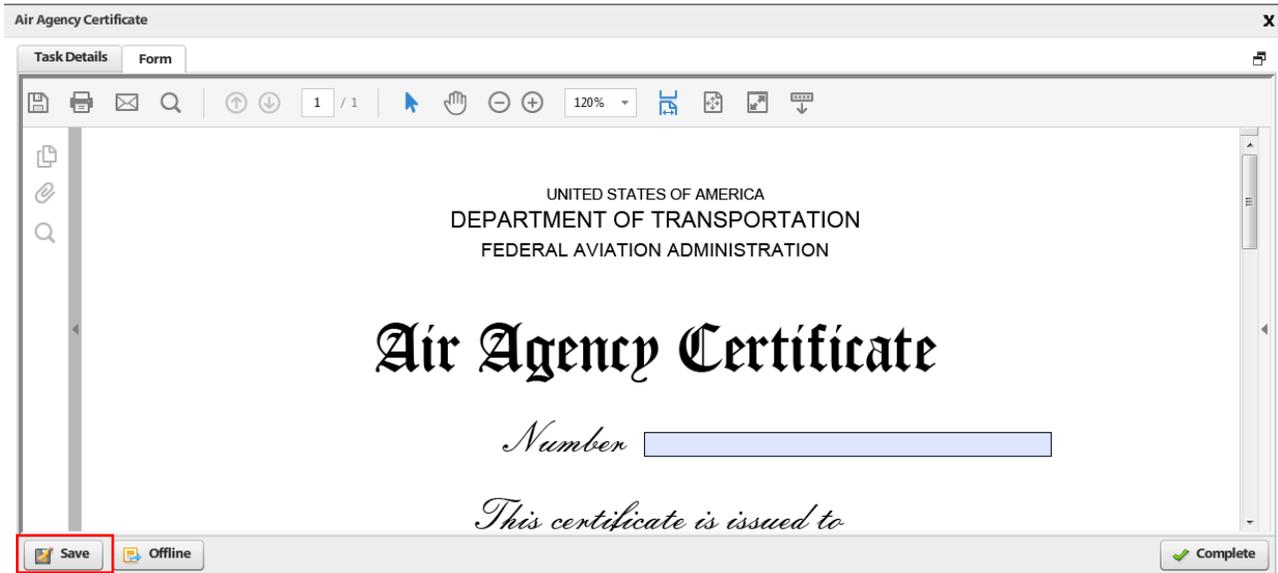
Related Topic:

[Saving a Form Offline](#)

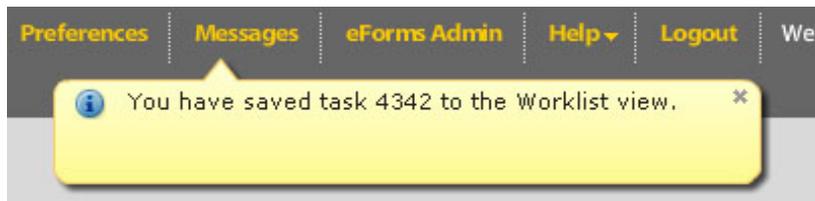
7.6.7 Saving to Worklist (Draft)

If you need to save the form for future editing or completion, you can save a draft copy of a form so that you do not lose your existing work. This does **not** submit the form.

1. With the form tab open, click the **Save to Worklist (Draft)** button on the bottom left corner of the form.



2. A confirmation bubble briefly appears to confirm that that the form has been saved to the Worklist view.



- When you exit the form and go to the Worklist view, the Save to Draft icon appears next to the form (see example below).

WORKLIST
IN PROGRESS
ARCHIVED

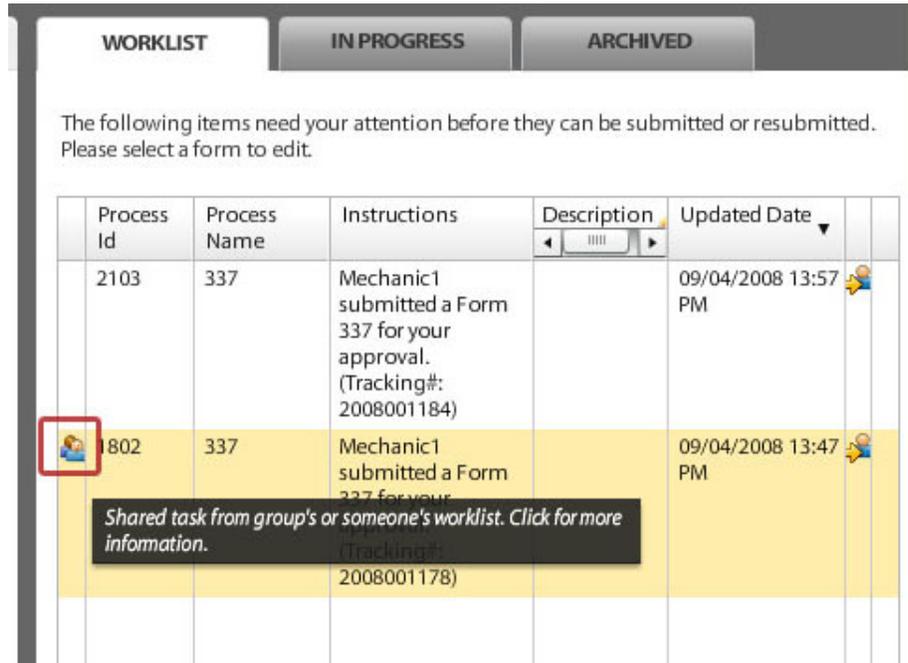
The following items need your attention before they can be submitted or resubmitted. Please select a form to edit.

Process Id	Process Name	Instructions	Description	Updated Date	
0	Major Repair/Alteration	Fill out this form to get your repair approved.	Electronic Form for "Major Repair/Alteration" (Form 337)	04/30/2009 14:01 PM	 

7.6.8 Claiming a Shared Form

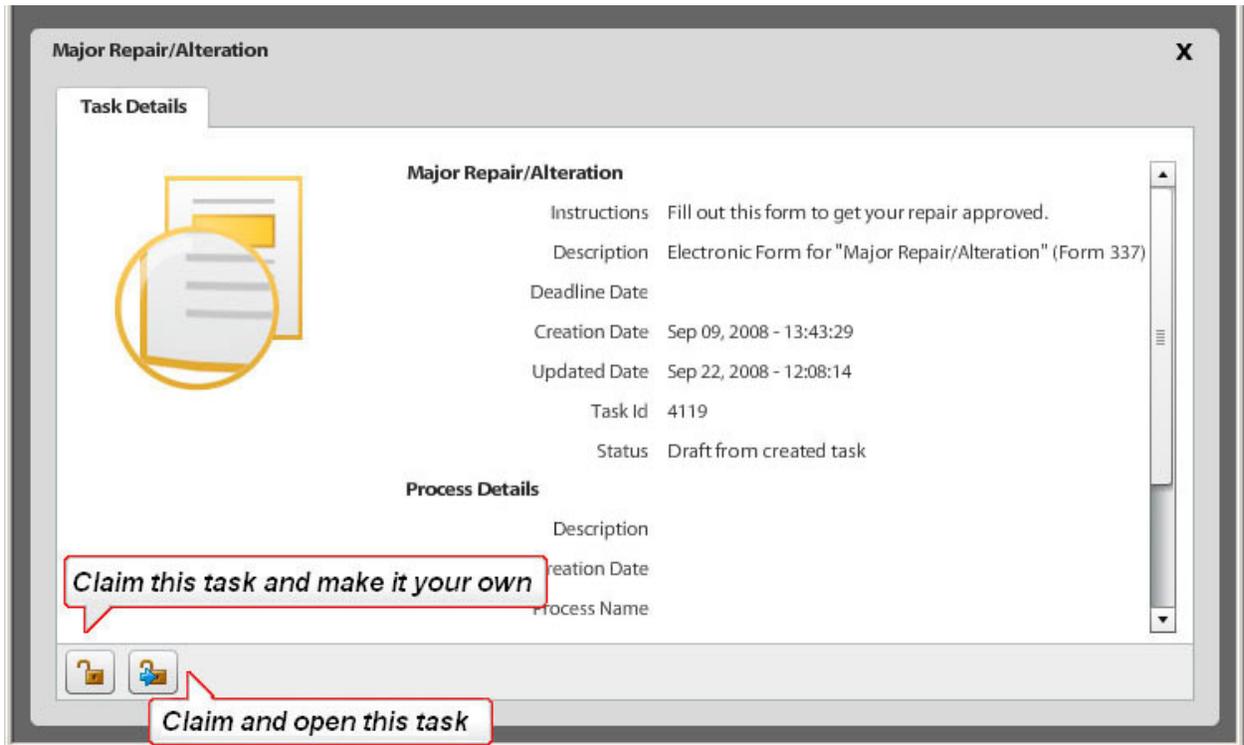
Electronic form users can claim a shared task by performing the steps below. Shared tasks have the  icon to the left of the tasks.

1. Double-click on the shared task in the Worklist view to open it.



2. The Task Details window opens. Click on the left icon  to claim the task and add it to your own Worklist for future work. Click the right icon  to claim and open the task for immediate

attention.



Related Topic:

[Manage Worklists](#)

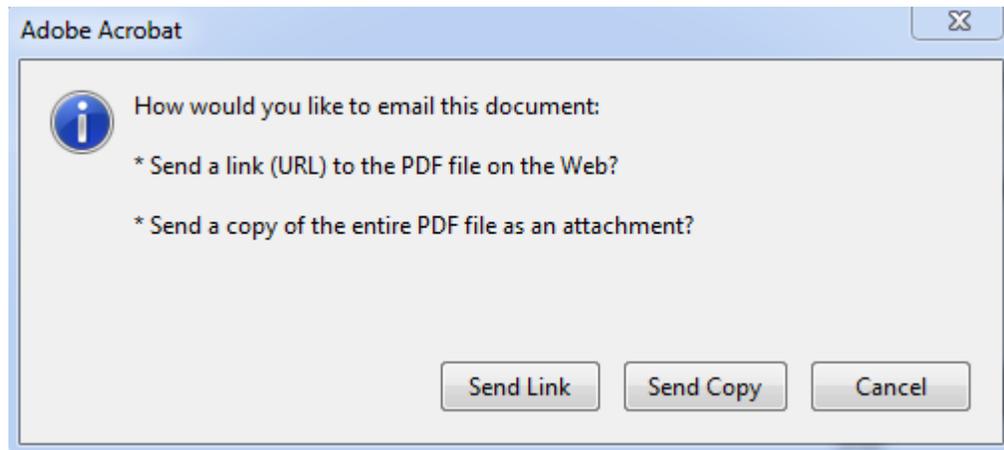
7.6.9 Emailing a Copy of the Form

The preferred way to share a form with another user is by using the [Forwarding](#) option in Form Manager. However, you may use the email option to share the form with users who do not have an FAA account.

1. Click the Email icon on the toolbar above the form.



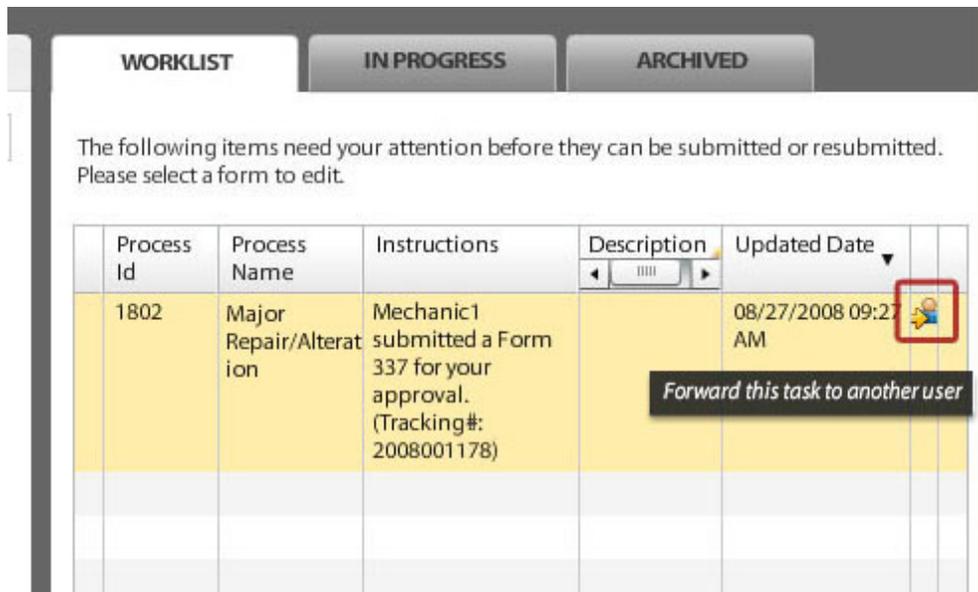
2. A dialog box appears for you to select one of two options to email the document. Click the **Send Copy** button to send a copy of the PDF file, including your changes, as an attachment to your email.



7.6.10 Forwarding a Form

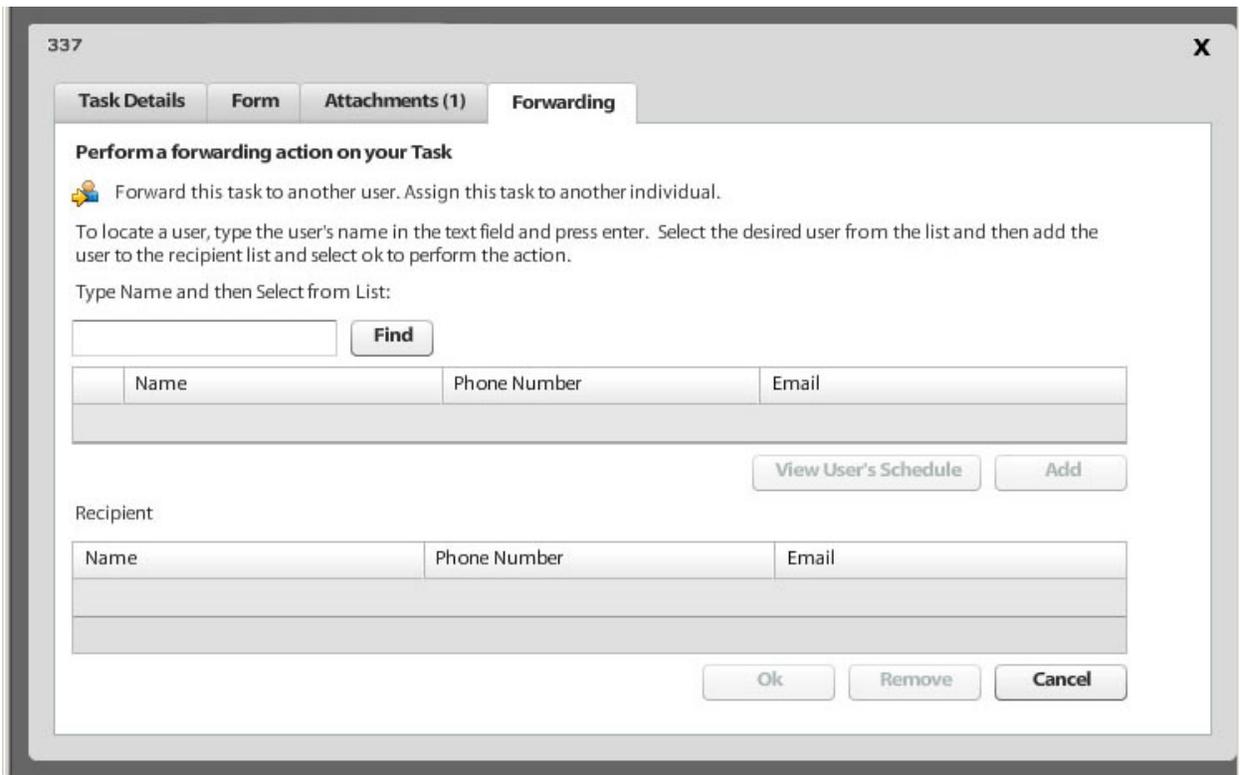
The Forward function can be used to forward a form to another user for review purposes, collaboration, or assistance in completing the form. This does **not** submit the form or route it to the next stage in the workflow process.

Forwarding a form can be done from either the Worklist tab or from the Task Details tab (if applicable), as shown in the examples below.





1. Click the Forwarding icon to open the Forwarding window as shown below.

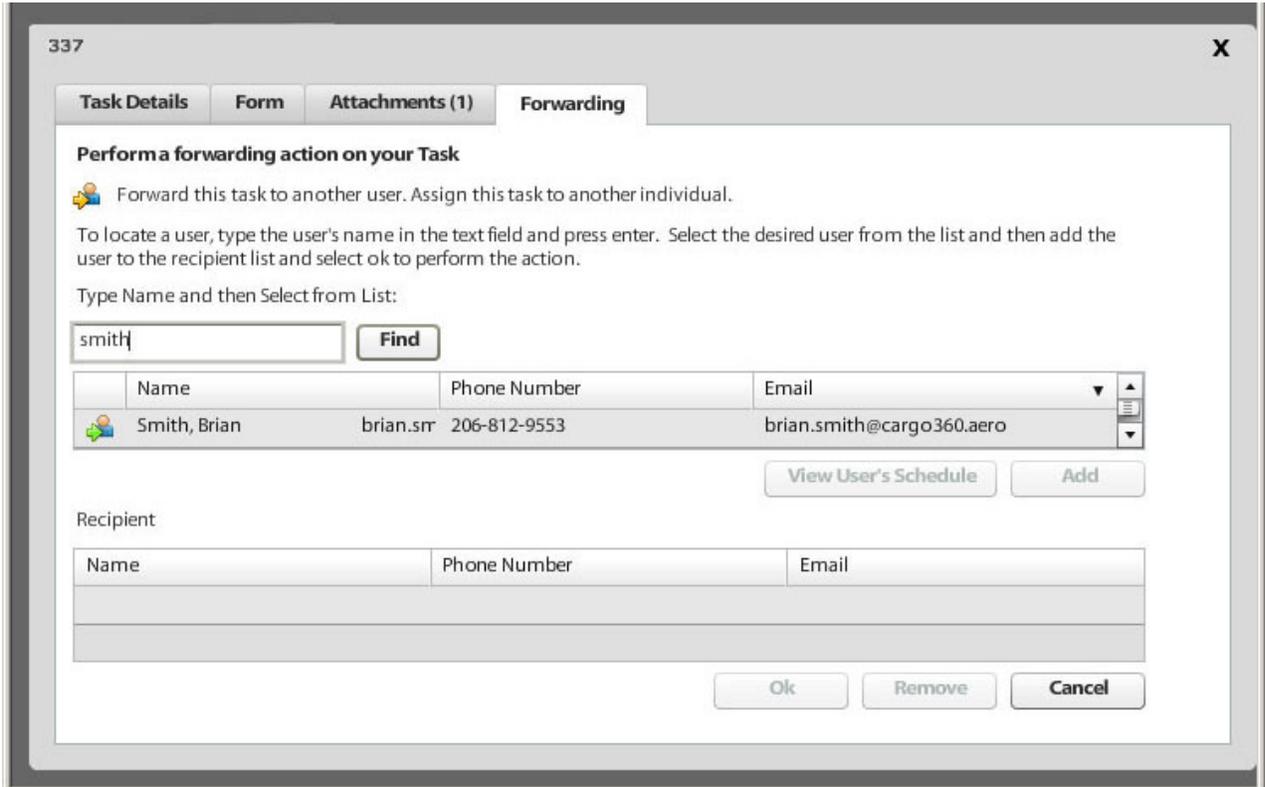


2. To locate a user, type the user's name in the text field and click the **Find** button or press **Enter** on the keyboard.

NOTE: You can enter either the first name or the last name (not both) or the format of

(lastname, firstname). User name is not case-sensitive.

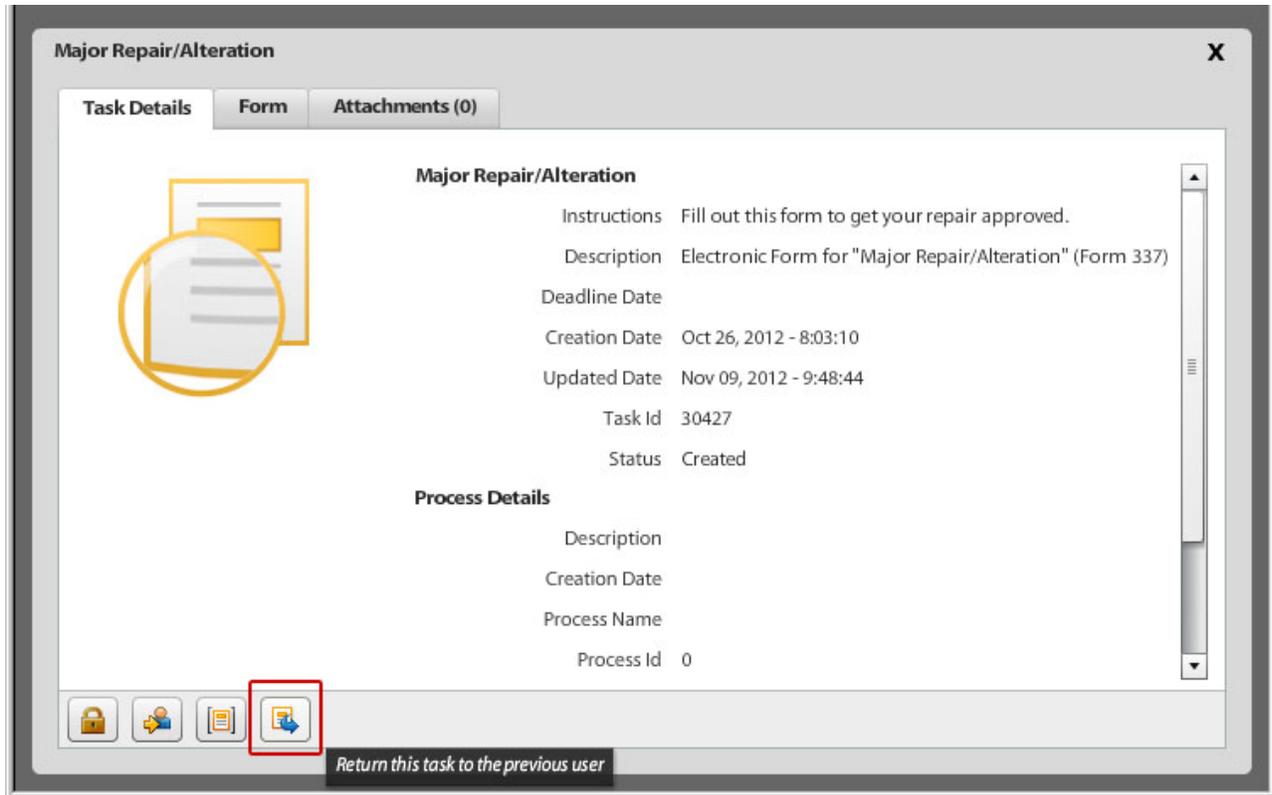
3. Select the desired user from the list (see example below) and click on the Forwarding icon  next to the user name. The result of the search may return more than one name (i.e., for the last name Smith). Scroll down the list and select the appropriate individual.



4. Click the **Add** button to add the user to the Recipient list.
5. Click **OK** to forward the task.

Returning a Forwarded Form

1. To return the forwarded form back to the sender, open the form in the Worklist.
2. On the Task Details tab, click the "Return this task to the previous user" icon on the bottom of the window.



3. The form disappears from your Worklist view and a yellow message bubble appears on the top menu bar to notify you that the form has been added to the previous user's Worklist queue.

7.6.11 Printing a Form

To print a form, click on the Print icon  on the toolbar above the form. Clicking on File > Print from the main top menu bar of the Internet browser will not print the form.



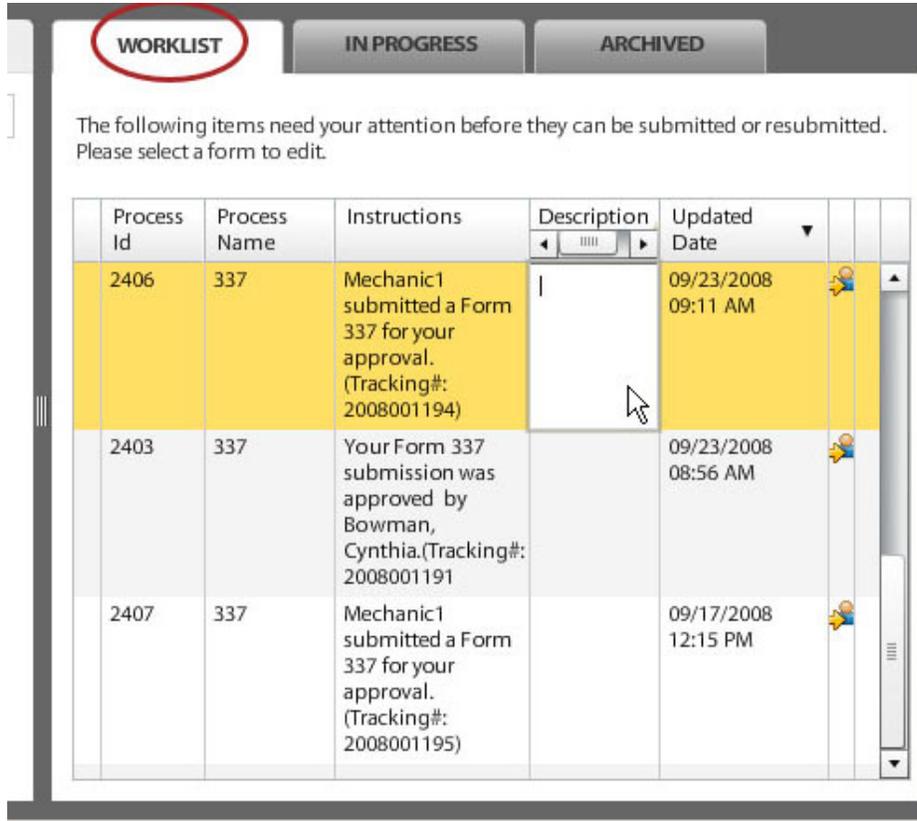
7.6.12 Changing the Description for a Task

The description for each task can be changed (or added) while in **Worklist** view or in **Archived** view. See examples below.

NOTE: This description is used for organizing your own Worklist and Archived views and does not go with the task when it is sent to the next stage of the workflow process. The only exception is when the task is forwarded to another user since the description stays only with forwarded tasks.

Changing Task Description in Worklist View

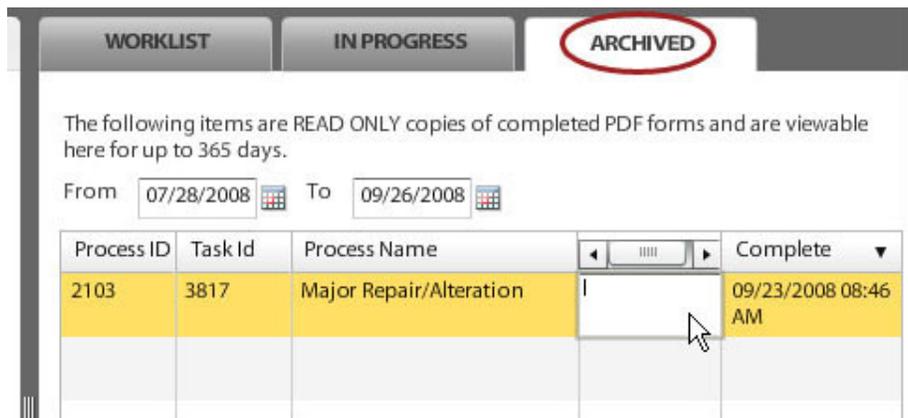
Click inside the Description section of the task and type the description in the text box. Press **Enter** on the keyboard or click outside the text box when finished.



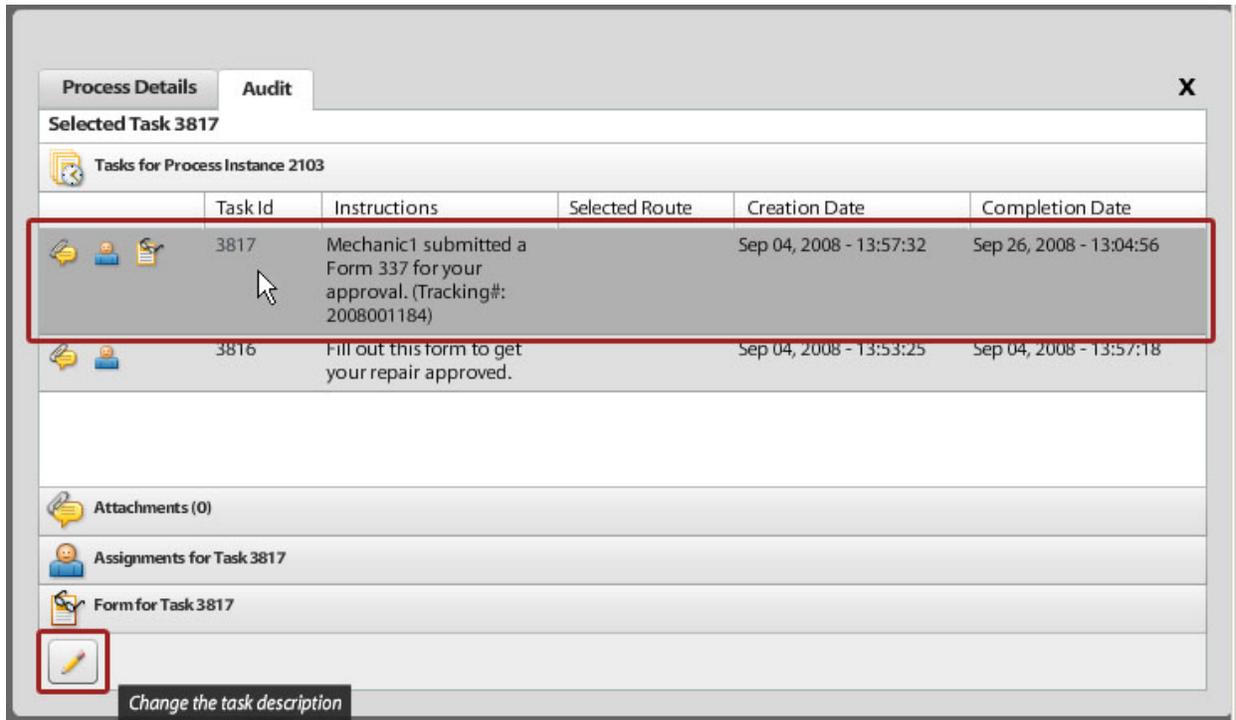
Changing Task Description in Archived View

For the Archived view, there are two ways to change the task description:

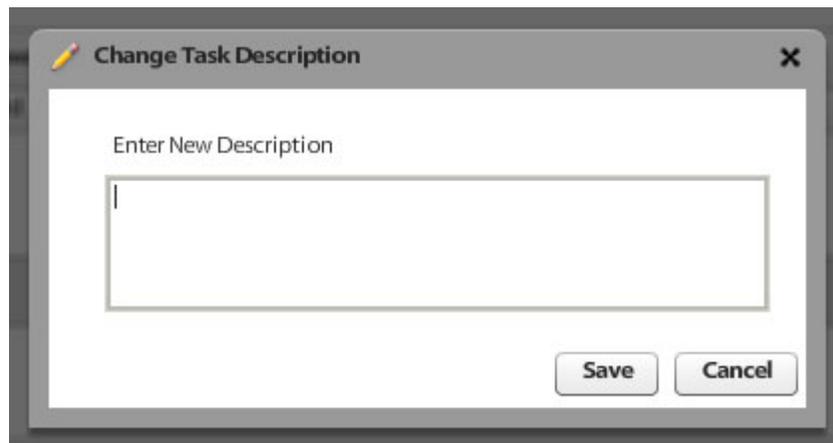
One way is by clicking inside the Description section of the task and typing the description in the text box. Press **Enter** on the keyboard or click outside the text box when finished.



Another way is by double-clicking on the task in the Archived view above to open it and then selecting the Audit tab. Click once on the task and the Edit icon  appears on the left bottom corner of the window, as shown in the example below. The Edit icon is also visible when clicking on the View icon  to open the form.



Click on the Edit icon and the "Change Task Description" window appears for you to enter the description of the task.



Click **Save** when done or **Cancel** to go back to Audit view.

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7.7 Problems Accessing the System

7.7.1 Locked Account

To unlock your account, contact the helpdesk at 1-844-FAA-MyIT (322-6948) or email [helpdesk](#)

Related Topic:

[User Support](#)

END OF DOCUMENT