

FTA

FEDERAL TRANSIT ADMINISTRATION

TrAMS Basics: Changes from Team & Navigation

April 26, 2016



U.S. Department of Transportation
Federal Transit Administration

Section Topics

- Changes from TEAM
- Getting into TrAMS
- Navigating TrAMS
- Navigating Records

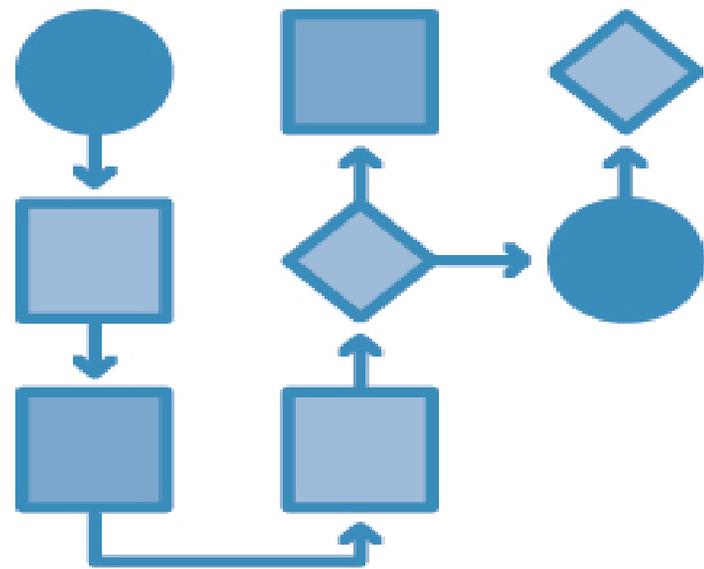
CHANGES FROM TEAM

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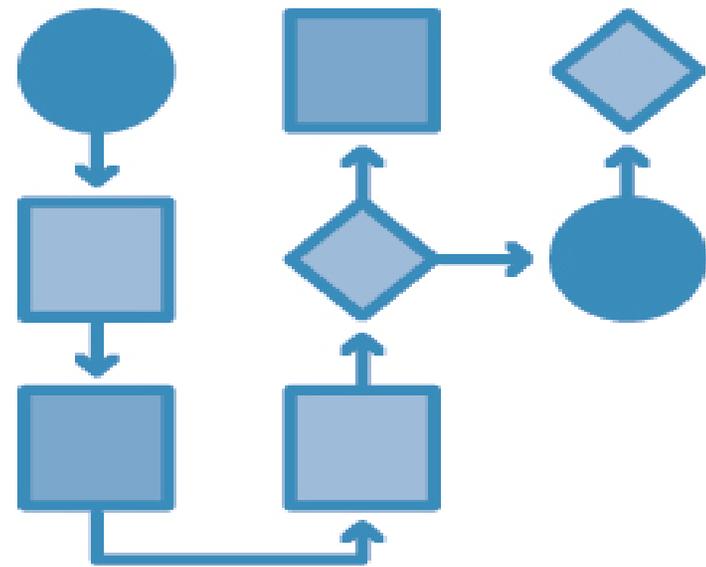
Workflow & User Role Orientation

- A *Workflow* is a sequence of actions.
- A specific *User* (or *Role Group*) is responsible for completing each action.
- The *User Role* identifies who can do what actions.



Workflow & User Role Orientation

The system workflow identifies which User Role takes the next action in the sequence and uses “Notifications” or “Tasks” to let the user know something must be completed.



Workflow Notifications & Tasks

- **Notifications** are emails to identify an action that must be completed.
- **Tasks** are actions, listed in the Task Tab in TrAMS.
- Tasks and notifications go to **User Groups**; every user in a given user group will receive the task. Users will need to coordinate to determine who should “claim” the task.

TEAM to TrAMS Recipient Roles

	TEAM/Functions	TrAMS/Roles & Functions
<i>New</i>	N/A	User Manager
<i>New</i>	N/A	Developer
Same	Submit	Submitter**
Same	Civil Rights/DBE Reporting	Civil Rights
Same	Execute	Official**
Same	Certify as Official	Official**
Same	Certify as Lawyer	Attorney**
Same	Certify for Both	Requires Official & Attorney Roles**
<i>New</i>	N/A	FFR Reporter
<i>New</i>	N/A	MPR Reporter
		<i>** Requires a PIN</i>

FTA User Roles

Two key FTA User Roles to be aware of are:

1. Pre-Award Manager: This is the person who works with the recipient from application development to award.
2. Post-Award Manager: This is the person who works with the recipient after the Award.

EMAILS!

TrAMS generates a large number of emails, especially if a user belongs to multiple user groups.

Consider using rules to manage your incoming TrAMS emails.

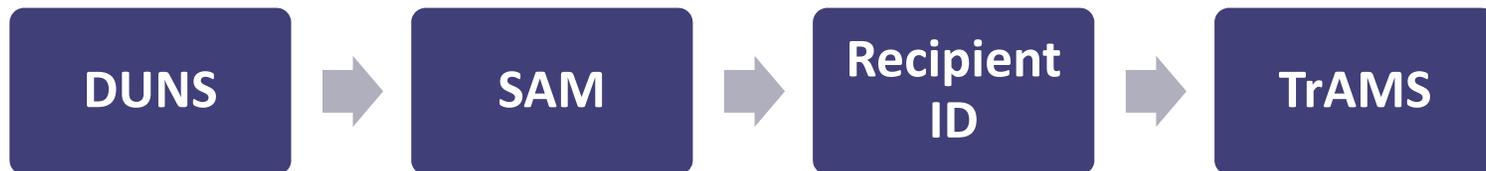


GETTING INTO TRAMS

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Maintaining TrAMS Accounts: Recipient Organization



- TrAMS draws Recipient Organization information from SAM (System for Award Management)
 - Recipient must make any required adjustments to Recipient Name, Address, etc. in SAM
 - Changes will be reflected in TrAMS

Maintaining TrAMS Accounts: Users

- All prior Active TEAM users (as of 11/30/2015) were migrated to TrAMS.
- All prior active TEAM users with a valid email address received an email notice on February 16, 2016, with instructions to set up a new password.
- Users should have access to the same roles functions as they did in TEAM.
- NOTE: Each user must have a unique email address.

User

- May set/update password
- May set/update PIN (if roles requiring PIN have been assigned by User Manager)

User Manager

- May add users for organization
- May deactivate users for organization
- May assign/change roles (including PIN functions*) for given users

*When assigning roles that require a PIN (i.e., Submitter, Official, Attorney), the User Manager will be prompted to upload “Justification Documents.” This is the **Designation of Signature Authority Resolution**. A sample resolution may be found here:

https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/Delegation_of_Authority_Sample_Resolution.pdf

Regional Local Security Manger

- May add User Manager permissions* to an account
- May provide basic assistance to User Manager

*To add the User Manager permissions to an account, the LSM must receive a **User Manager Designation form**. A sample form may be found here: <https://www.transit.dot.gov/funding/grantee-resources/teamtrams/user-manager-template-word>

Region 4 Local Security Manager:

Richelle Gosman

richelle.gosman@dot.gov

(404) 865-5478

FTA TrAMS HelpDesk

- May provide assistance where grantee training materials or regional contact (PreAward Manager/PostAward Manager) are unable to help
- May troubleshoot system errors
 - Helpful to include screenshots of error, where applicable
- Please contact as a last option

HelpDesk Contact Information:

FTA.TrAMS.Help@DOT.GOV

(877) 561-7466

How to Log In & Create Password

- New users receive an auto-generated email from TrAMS to set up your password.
- If this message does not appear in the general inbox, be sure to check your spam/junk email box.

Password Basics

- Your User Name is your business email (jane.doe123@Transit567.com)
- Your User Name is case sensitive – lowercase only!
- Your password requirements are as follows:
 - Min. Password Length: 12 Characters
 - 1 Alphabetic Character
 - 1 Numeric Character
 - 1 Symbol: ! " # \$ % & ' () * + , - . / : ; < = > ? @ [\] ^ _ ` { | } ~

Reset Password

- Navigate to the TrAMS landing page
- DO NOT enter information in the Username field or Password field. Select the blue “Reset Your Password” link in the bottom left corner; it is a hyperlink to the next step.

The image shows a screenshot of the Federal Transit Administration (FTA) login page. The page header includes the U.S. Department of Transportation logo and the text "U.S. Department of Transportation Federal Transit Administration". Below the header are two input fields: "Username" and "Password". There is a checkbox labeled "Remember me on this computer". At the bottom left, there is a blue hyperlink labeled "Reset Your Password". At the bottom right, there is a green button labeled "Sign In".

Annotations:

- A box labeled "Select 'Reset your Password Link'" has an arrow pointing to the "Reset Your Password" link.
- A box labeled "Leave Blank" has two arrows pointing to the "Username" and "Password" input fields.

Set Up Password

- The “Reset Your Password” link will take you a screen where you can enter your Username – this is your business email address. You must use lowercase for your email address.

Request Password Reset

Please enter your username.

* Username Mike.MBTA@gmail.com

Request Password Reset Cancel

*Required

- For new users, your Username will be provided in the email.
- Your Username is case sensitive and must be lowercase.
- Click on “Request Password Reset” button and the system will send you a second email message to set up/ reset your password.

Set Up Password

Click “close” and return to your email to get the link to set your password.

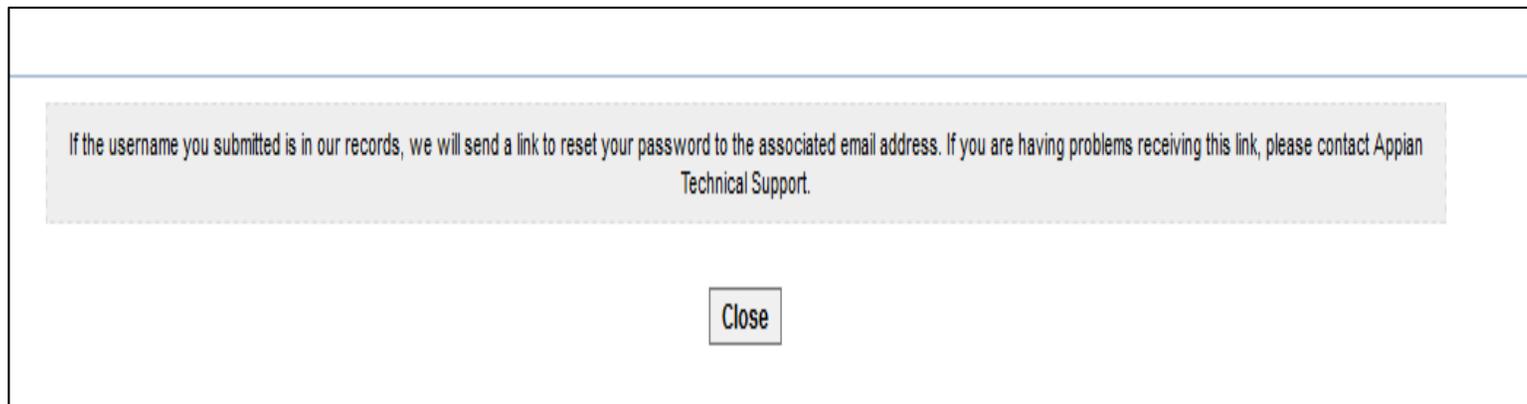


Illustration Only

Set Up Password

Click on the link to be redirected to the password reset form; the link is valid for 15 minutes.

The screenshot shows an email interface. The subject line is "Appian for Federal Transit Administration (TEST) Forgot Password Instructions". The email body contains the following text:

This is an automated response from Appian about your forgot password request.

Please click on the following link or copy and paste in your browser's address bar the enclosed URL to enter your new password.
https://ftauat.appiancloud.com/suite/personalization/resetforgotpassword_popup?token=DWz4tpgvTT852d7CMw8y8dRehklpmFftkaU%2FnCwMsAYy9fg6DcnFipp%2BK4xwl4cYMz9Sq%2BmDd5N%0AxGNOFq2MoA%3D%3D&instanceId=node1

The above URL is only valid for 15 minutes after it has been issued and it is only valid for the user who it was generated for. Once you have entered and confirmed your new password, you will be able to access Appian using this new password.

If you have any questions, please contact your system administrators.

Thank you,
Appian

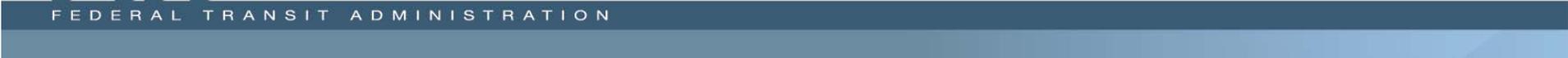
A dark blue callout box with the text "Click the provided link" has an arrow pointing to the URL. A white box with a black border containing the text "Illustration Only" is located in the bottom right corner of the email content area.



NAVIGATING TRAMS

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The Basics: System and Browser

- TrAMS works in multiple browsers; your experience will differ based on browser and version.
- You can also use Tablet or Smart phone.
- Appian has an application you can download, but is not required to access TrAMS.



The Basics: Inside TrAMS

FTA has incorporated into the system:

- ✓ FTA Guidance Information
- ✓ Resource Links to Websites
- ✓ Status Information (progress bars and requirements tables)
- ✓ Error Messages to notify the user when something is missing or an invalid value was entered

The Basics: Inside TrAMS

- “Breadcrumb Trails” help you know where you are in the system and to navigate the system.



The screenshot shows the TrAMS system interface. At the top, there is a navigation bar with tabs for "News", "Tasks (4)", "Records", "Reports", and "Actions". The "Records" tab is currently selected. Below the navigation bar, the breadcrumb trail is displayed as "Records / Applications / Awards", with the "Records" link highlighted in a red box. To the left of the breadcrumb trail is the U.S. Department of Transportation Federal Transit Administration logo. Below the breadcrumb trail, the text "1089-2016-4 | FY 2015 Section 5307 Urbanized Area" is visible. Below this text, the word "Summary" is partially visible.

- Hyperlinks to System Records may also be used to navigate within the system.
- Multiple ways to get to or search for the same information.

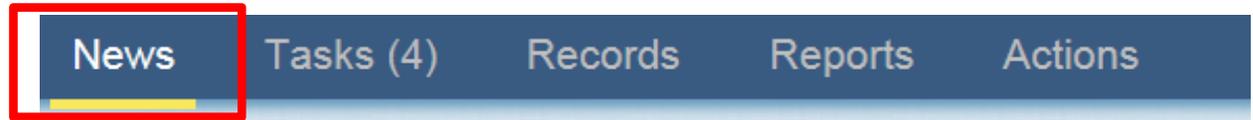
Basic Format & Terminology

Navigation Tabs & Sign Out & User Profile

Sidebar or Left
Navigation
Populates Menus
& Filters

Forms and
Main Menus

News Tabs

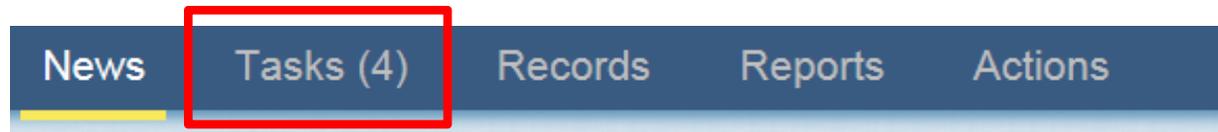


News: This is your Landing Page.

- Here you will receive application and system news (information), and you can collaborate with other TrAMS users through messaging (posts, tasks, kudos). News feeds and messages may be targeted to specific users, groups, or to all users.

Keep in mind all information is FOIA-able. There are limitations on what/when information can be deleted.

Task Tab



- Tasks list the specific work items that have been assigned to the you the user or the user group which you belong. It lists the most current action first, and there is a tool to filter your tasks.
- Here in this example there are four (4) tasks pending in my queue to complete.

Records

News

Tasks (4)

Records

Reports

Actions

The Records can be used to search for and work on records that exists in the system.

1. **Application/Awards** are associated with the recipients' organization
2. **Projects** make up applications and awards
3. **Recipient Organization** make up the recipients' organizational information
4. **Static Reports** are nightly generated reports and archived reports from TEAM
5. **Users** are users that have access to TrAMS within the recipients' organization.

Actions Tab

News

Tasks (4)

Records

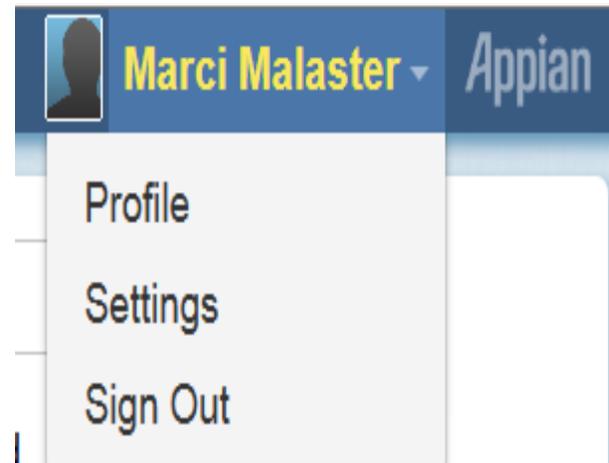
Reports

Actions

1. Manage user records
2. Create new records (create a new application)
3. Perform searches for specific records (search for applications or user information)
4. Create and view Excel reports that compile your organization data in the system (e.g., Application Status Report)

Your User Account & Sign Out

- In the Navigation Bar top right side of the screen you will find a Profile Icon and your User Name.
- Click on your Name/or the drop arrow, either works and the following Menu Options Populate: Profile, Setting, and Sign Out.

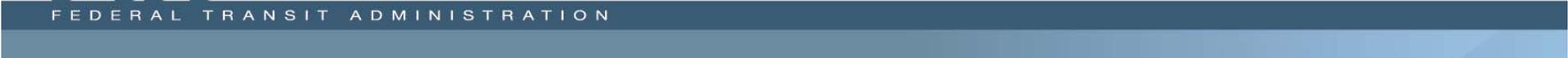




NAVIGATING RECORDS

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Summary Page & Dashboards

- When you select a Record, you will land on the summary page. It provides an overview of the record.
- Records also have dashboards that are summary views of information included in the record. Some dashboard views include links to records.

The screenshot displays the FTA system interface. At the top, there is a navigation bar with tabs for 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. Below this, the 'Records' tab is selected. The main content area is divided into two columns. The left column contains a sidebar with the FTA logo and a 'Summary >' section. A red bracket highlights the 'Summary >' section, which includes links for 'News', 'Related Actions', 'Applications/Awards', 'TrAMS Users', 'Locations', 'Designated Recipient', and 'Suballocations'. The right column shows the 'Records / Recipient Organization' section for 'Transportation, Wisconsin Dept'. Below this, there is a 'TrAMS Profile Information' section with the following details:

Recipient ID	1245
Recipient Acronym	WISCONSIN DOT
Recipient Alias	WISCONSIN DEPT. OF TRANSPORTATION/BUREAU OF TRANSIT
Recipient Cost Center	78500
Is State DOT?	Yes
Recipient OST Type	State Agency
Is Designated Recipient?	Yes

In your Organizational Profile you have dashboards to display users, your locations or congressional districts, etc...

Sidebar Menu and Filters

The sidebar, or left navigation, changes depending on the tab and action you are taking. In the first example it populates a menu, and the second filters to narrow down a list.

News Tasks (2) Records Reports Actions

U.S. Department of Transportation
Federal Transit Administration

Records / Recipient Organization
Transportation, Wisconsin Dep

TrAMS Profile Information

Recipient ID
1245

Recipient Acronym
WISCONSIN DOT

Recipient Alias
WISCONSIN DEPT. OF TRANSPORTATION/BUREAU OF TRANSIT

Recipient Cost Center
78500

Is State DOT?
Yes

Recipient OST Type
State Agency

Is Designated Recipient?
Yes

Summary ▶
News
Related Actions
Applications/Awards
TrAMS Users
Locations
Designated Recipient
Suballocations

News Tasks (1) Records Reports

U.S. Department of Transportation
Federal Transit Administration

Appli

Search Applications / Award

All ▶

Pre-Award Status

- In-Progress
- In-Progress / Returned to Grantee
- Transmitted / Ready for FTA Review

More...

Post-Award Status

- Active (Executed)
- Deobligation Required
- Active / Budget Revision In-Progress

More...

Search Functionality

You will have different views if you work with one organization versus multiple organizations. Actions Tab > Search Applications/Awards for one organization view is below, there is no field for recipient ID since this user only belongs to one organization – TrAMS has already associated the user to the organization .

Records Reports **Actions** Rebecca RTA Appian

Application | Search Applications
Enter one or more of the following search criteria to find an existing application.

Application Search Criteria

Fiscal Year	Any	Application Name	
	Select obligation fiscal year for application		Enter all or part of an application name
Federal Award ID Number (FAIN)		Application State	
	Enter federal award ID number		Enter state abbreviation for application
Section Code		Application Status	Any
	Enter two-digit section code for application funding source		Select application status

Search Cancel

Search Functionality

In this view of Action Tab > Search for Applications/Awards, the user is associated with multiple organizations, so a Recipient field appears; you must enter an ID for TrAMS to identify which organizational information you want to view.

Records Reports **Actions** Brother Masterson - Appiar

Application | Search Applications
Enter one or more of the following search criteria to find an existing application.

Recipient Search Criteria

Recipient ID
Enter four-digit recipient ID

Recipient Name
Enter all or part of a recipient's legal business name

Application Search Criteria

Fiscal Year
Select obligation fiscal year for application

Federal Award ID Number (FAIN)
Enter federal award ID number

Section Code
Enter two-digit section code for application funding source

Application Name
Enter all or part of an application name

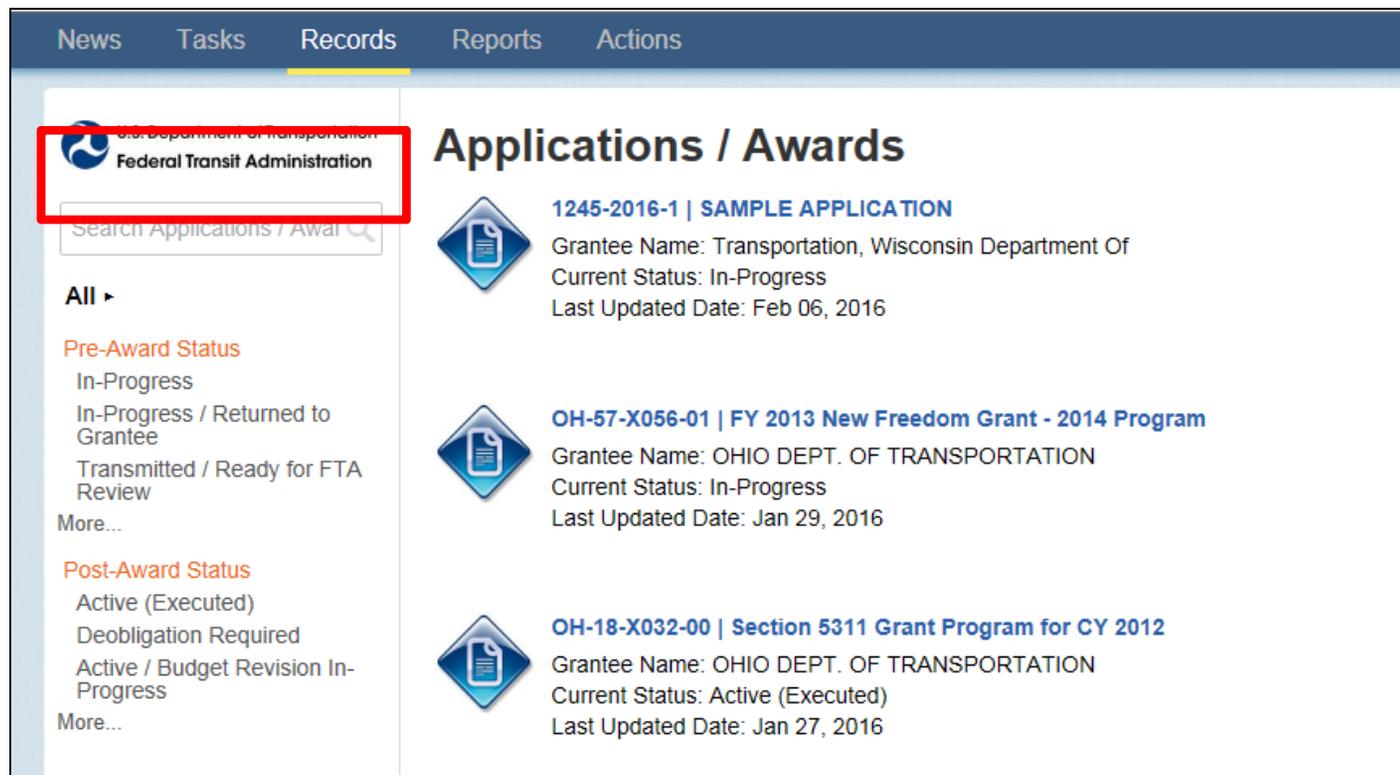
Application State
Enter state abbreviation for application

Application Status
Select application status

Use Dashes & Hit Enter!

In TrAMS search fields, you must include the dash.

Also note that the magnifying glass is simply an icon, *use the **Enter** function on your keyboard to initiate a search.*



News Tasks **Records** Reports Actions

 **Federal Transit Administration**

Search Applications / Awards

All ▶

Pre-Award Status

- In-Progress
- In-Progress / Returned to Grantee
- Transmitted / Ready for FTA Review
- More...

Post-Award Status

- Active (Executed)
- Deobligation Required
- Active / Budget Revision In-Progress
- More...

Applications / Awards

 **1245-2016-1 | SAMPLE APPLICATION**
Grantee Name: Transportation, Wisconsin Department Of
Current Status: In-Progress
Last Updated Date: Feb 06, 2016

 **OH-57-X056-01 | FY 2013 New Freedom Grant - 2014 Program**
Grantee Name: OHIO DEPT. OF TRANSPORTATION
Current Status: In-Progress
Last Updated Date: Jan 29, 2016

 **OH-18-X032-00 | Section 5311 Grant Program for CY 2012**
Grantee Name: OHIO DEPT. OF TRANSPORTATION
Current Status: Active (Executed)
Last Updated Date: Jan 27, 2016

I'm "Working"

Around the middle of the screen at the top, you will see the words "Working" or Actions Successfully Completed.

"Working" means it is completing the action you just took. Wait for the working to stop before you move onto another action.

The screenshot shows a web application interface for the U.S. Department of Transportation Federal Transit Administration. The top navigation bar includes 'News', 'Tasks (1)', 'Records', 'Reports', and 'Actions'. A yellow star is placed over the 'Actions' tab. The user profile 'Marci Malaster' is visible in the top right. The main content area displays a notification feed with three entries:

- Brother Masterson** Application 1245-2016-1 - SAMPLE APPLICATION has been created. Saturday, 7:06 PM
- Charlie CTA** Application 1182-2016-1 - Test Application for FAIN-Reservation Webinar has been created. Friday, 6:21 PM
- Charlie CTA** Application 1182-2016-1 - Test Application for FAIN-Reservation Webinar has been transmitted to FTA Pre-Award Manager for Initial Review and Initial Concurrence Review Routing. Friday, 6:30 PM
- Charlie CTA** Application IL-2016-001-00 - Test Application for FAIN-Reservation Webinar has been submitted to the David Schneider for Final Concurrence review routing. Friday, 6:39 PM

The interface also includes a search bar for news, a 'Click here to post...' button, and a 'Add your comment here...' input field.

Tables/Grids: You can sort on any column. Look for the down arrow!

Recipient Information				
Recipient ID 1910	Recipient Name Madison, City Of			
Recipient DUNS 076147909	Acronym MADISON			
Applications				
FAIN	Application Name	Last Updated By	Last Updated Date ↓	Status
WI-95-X052-00	FY15 Surface Transportation Program		Sep 22, 2015	Active (Executed)
WI-04-0059-01	CLOSE OUT AMENDMENT		Aug 04, 2015	Closed
WI-39-0001-01	CLOSE OUT AMENDMENT		Jul 21, 2015	Closed
WI-16-X005-01	FY13 -14 Section 5310 Enhanced Mobility		Jun 05, 2015	Active (Executed)
WI-79-1001-00	Forward Madison UrbanFootprint		May 29, 2015	Active (Executed)
WI-04-0059-00	SGR for Vehicle Rep, Farebox & Shelters		Feb 20, 2015	Closed
WI-90-X765-00	FY2014 Sct 5307 PM, Bus, Misc. Cap., Plg		Jan 21, 2015	Active (Executed)

Other FAQs

Browser Back Button: the internet browser back button may work in certain sections within TrAMS, but it often will not. This is because TrAMS uses workflows which have a sequence of steps. The browser will not know your last step. Where it makes sense, a Back Button was added to go back one step/screen.

Numerical Fields: Where dollar fields populate, you are not required to type in the \$ or commas. After entering information click outside the field for the system to auto format the field.

TrAMS Navigational Buttons

- **There is no “Save” Button.** Each module is intended to take you through a shorter sequence of steps and then save as you move to the next step of a workflow or to complete a workflow.
- **Green Buttons** is generally the typical path to save and/or move forward in a workflow.
- **Cancel Button** generally means you do not want to complete an action.
- **Close Button** generally means you are done, and you leave the page/screen.

Need Help?

FTA TrAMS Webinars

(presentation files & recordings)

<https://www.transit.dot.gov/funding/grantee-resources/teamtrams/trams-training>

Help Desk:

(877) 561-7466

FTA.TrAMS.Help@DOT.GOV

For General Questions, contact your FTA representative or Local Security Manager.

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Federal Transit
Administration
www.fta.dot.gov

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