National Transit Database
User Management and Monthly Reporting
New Reporting System ("NTD 2.0")

- Monthly ridership will be first operational module
  - Reporting starts in October for reporting September 2014 data
    - NTD will transfer already reported data in old system to NTD 2.0
- Annual reporting planned to start December 2014 for RY 2014 reporting
  - More details will be provided at annual reporting launch
- No change in data requirements
  - Same requirements in NTD 2.0 as current system
Our Agenda

Steps for Starting Monthly Reporting

1. Local system “user manager” creates user accounts

2. Systems now in FY 2015 do “report kickoff”
   - No action needed from reporters now in FY 2014

3. All systems start monthly reporting
Local System User Manager (LSUM)

• LSUM at each reporting agency approves (certifies) new users of FTA systems
  – NTD 2.0
  – TRAMS (updated TEAM)

• FTA requires each agency to identify a LSUM to FTA for “authentication”
  – TEAM users upload designation letter in TEAM
  – Non-TEAM users send letter to FTA NTD project manager in Washington DC
LSUM NTD Startup Tasks

• Create LSUM password
• Approve and enter local users into NTD 2.0
LSUM Receives Email Instructions

Hello Doug Harvey

A new user account has been created for you on the FTA Appian Environment.

You may log on at: https://ftauat.appiancloud.com

Your Username is:  doug.harvey@trimet.org

Please visit the above URL and click the 'Forgot Password' link, this will bring you to a prompt to create your password.

Thank You
LSUM Starts Password Process

Enter Username (all lower case letters)

Click on I agree to accept government warning

Click on Forget Password to start process to set password
Request Password Reset

Enter user name (email address)

Click on Request Password Reset
Dear Doug Harvey,

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=Wd308fXlh%2B%2F66dZI4mANE7DW5yNLDGJ%2Bq29YEMNEvi9KcmpBAqqu5oLbHR3DmUdpYwvQpWYukR%0AziPIBLE0bw%3D%3D

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
Set Password

Enter user name (email address)

Enter and reenter password

Click on Reset Password
Password Features (All Users)

- Same as current NTD reporting system
  - Federal requirements for length and complexity
    - Password length
      - Must be 12 characters and not more than 20 characters
    - Complexity
      - 3 out of 4 – Lower case, Upper case, Numbers, Special Characters
  - Password History
    - Password must be different from 10 previous passwords and must be different from any password used in the last 6 months
  - Password expiration period is 60 days
LSUM Logs In to Create Users

Click on I agree to accept government warning

Enter Username and Password

Click on Sign In

Enter username:

doug.harvey@trimet.org

Password:

***************

Forgot Password

Sign In
News Page is the Home Page

Click on Records to enter users
Records Page

Click on My NTD Reporter Profile(s)
My NTD Reporter Profile(s)

00008 - Tri-County Metropolitan Transportation District of Oregon

Validation Analyst: Mark Brown

Click on reporting agency name
Reporter Profile

00008 - Tri-County Metropolitan Transportation District of Oregon

NTD Validation Analyst
Name: Matt Bonzek
E-Mail: matt.bonzek.crt@dot.gov
Phone: 434-299-8803

Basic Information
Reporter Name: Tri-County Metropolitan Transportation District of Oregon
Acronym: TriMet
Address: 1800 SW 1st Avenue, Suite 300
Portland, Oregon 97201-5354
DUNS Number: 007909096
FRA Recipient ID: 1726
Website: Click here to visit http://www.trimet.org/

Active Modes
<table>
<thead>
<tr>
<th>Mode</th>
<th>Type of Service</th>
<th>Commitment Date</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus</td>
<td>Directly Operated</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
</tr>
<tr>
<td>Commuter Rail</td>
<td>Purchased Transportation</td>
<td>7/1/2008</td>
<td>7/1/2008</td>
</tr>
<tr>
<td>Demand Response</td>
<td>Purchased Transportation</td>
<td>7/1/1982</td>
<td>7/1/1982</td>
</tr>
<tr>
<td>Demand Response - Taxi</td>
<td>Purchased Transportation</td>
<td>7/1/2009</td>
<td>7/1/2009</td>
</tr>
<tr>
<td>Hybrid Rail</td>
<td>Purchased Transportation</td>
<td>7/1/2010</td>
<td>7/1/2010</td>
</tr>
</tbody>
</table>

Click on Related Actions
Click on View & Manage Reporter Users (P-30)
View & Manage Users (P-30)

Click on Add User
Add New System User

Add user information (name, email, address)

Click Next when completed
Select Reporter Role

00008 - Tri-County Metropolitan Transportation District of Oregon > View & Manage Reporter Users (P-30) > Add New System User

Please confirm all the details you have entered for this user.

Add New User Progress

Add New User  Assign NTD Role  Confirm New User

User Information

Username (Email)
Tow.Blake@TriMet.org

Name
Tow Blake

Primary Organization
Tri-County Metropolitan Transportation District of Oregon (NTD Id: 03008)

NTD Role *
-- Select a Role --
Select a Role for this User

Click Next when completed
## Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEO</td>
<td>Data entry, submit report, submit the CEO certification, all reporting areas</td>
</tr>
<tr>
<td>NTD Contact Person</td>
<td>Data entry, submit report, all reporting areas</td>
</tr>
<tr>
<td>Editor</td>
<td>Data entry, view forms</td>
</tr>
<tr>
<td>Viewer</td>
<td>View forms</td>
</tr>
</tbody>
</table>
Review and Submit User

- After submission, instructions are emailed to user to set up password
  - Identical process used for LSUM password
CEO and NTD Contact Required

• LSUM should create CEO and NTD users
  – Required for report “kick-off”
LSUM Sign Out

Click on username and click *Sign Out*
NTD Contact Startup Tasks

• Perform “report kickoff”
  – Systems now in FY 2015 must do kickoff
  – No action needed from reporters now in FY 2014

• Start monthly reporting
  – Enter September data
  – Enter August data if not done in September
What is a Kickoff?

• Confirmation of current “profile” information at beginning of fiscal year
  – Profile information = Old B-10/B-20 data

• Actions
  – Confirm reporter contact information is accurate.
  – Confirm mode information is accurate.
  – Confirm declared reporter type for previous FY is still accurate (e.g., small systems waiver)
  – Declare reporter type for new fiscal year
Why is Kickoff Done?

• Create annual reporting forms for prior year (e.g., FY 2014)

• Create monthly reporting forms for current year (e.g., FY 2015)
NTD Contact Logins to NTD 2.0

Enter your User Name and Password

Click on Sign In
Kickoff Starts on News Page

- Click on Tasks to start FY 2015
How to Start Report Kickoff

Click on Task
Accept Kickoff Task

1. Click Accept

2. Click Proceed
Manage Reporter Users

- Only user manager can add new users
- Individual users can edit own profile

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Role</th>
<th>Phone Number</th>
<th>E-Mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harvey</td>
<td>Doug</td>
<td>Viewer</td>
<td></td>
<td><a href="mailto:doug.harvey@trimet.org">doug.harvey@trimet.org</a></td>
</tr>
<tr>
<td>Blake</td>
<td>Toe</td>
<td>CEO</td>
<td></td>
<td><a href="mailto:toe.blake@trimet.org">toe.blake@trimet.org</a></td>
</tr>
<tr>
<td>Ferguson</td>
<td>John</td>
<td>NTD Contact</td>
<td></td>
<td><a href="mailto:john.ferguson@trimet.org">john.ferguson@trimet.org</a></td>
</tr>
</tbody>
</table>

Click continue to go to next confirmation
### Manage Modes

**U.S. Department of Transportation**

**Federal Transit Administration**

**Save Changes**

---

**00008 - Tri-County Metropolitan Transportation District of Oregon > View & Manage Reporter Modes (P-20)**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Type Of Service</th>
<th>Commitment Date</th>
<th>Start Date</th>
<th>End Date</th>
<th>FG/HIB</th>
<th>Seasonal Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demand Response</td>
<td>Directly Operated</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
<td>6/30/1999</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Light Rail</td>
<td>Directly Operated</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Bus</td>
<td>Directly Operated</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Street Car Rail</td>
<td>Directly Operated</td>
<td>7/1/2010</td>
<td>7/1/2010</td>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Commuter Rail</td>
<td>Purchased Transportation</td>
<td>7/1/2008</td>
<td>7/1/2008</td>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Demand Response</td>
<td>Purchased Transportation</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Bus</td>
<td>Purchased Transportation</td>
<td>7/1/1992</td>
<td>7/1/1992</td>
<td>6/30/1995</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>Demand Response - Taxi</td>
<td>Purchased Transportation</td>
<td>7/1/2009</td>
<td>7/1/2009</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Street Car Rail</td>
<td>Purchased Transportation</td>
<td>7/1/2012</td>
<td>7/1/2012</td>
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<td>Y</td>
<td>N</td>
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<tr>
<td>Hybrid Rail</td>
<td>Purchased Transportation</td>
<td>7/1/2010</td>
<td>7/1/2010</td>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

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- Click to add mode
- Click to edit/delete selected mode/TOS

- Add, edit, or end mode/TOS as needed
Add Mode Screen

- Mode drop down menu
- TOS selection = directly operated or P.T.
- Commitment date = capital funds first expended
- Start date = first day of revenue service
End date = Last day of revenue service

Modes are ended, not deleted
Proceed to Reporter Type Confirmation

Click continue to go to next confirmation
Previous Reporter Type Confirmation

- Reporter type determines your required forms
- Click yes to go through questionnaire
  - Questions appear
  - Strongly suggested for first-time NTD 2.0 users
## Previous Reporter Type Confirmation

Please answer the following questions to confirm the reporter type for the 2014 fiscal year.

### Existing Reporter Type

<table>
<thead>
<tr>
<th>Current</th>
<th>Full Reporter: Operating</th>
</tr>
</thead>
</table>

*Change Type?*

- [ ] Yes
- [ ] No

Select "Yes" if you would like to indicate a different reporter type.

### Questionnaire

- **5307 Beneficiary?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you were a beneficiary of 5307 Urbanized Area formula funds (including direct funds, indirect funds through someone else, and use of assets purchased with these funds).

- **Reporting Under Another NTDID?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if any of your agency service is being reported under another NTDID.

- **Operating Public Transit Service?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you were operating public transportation service.

- **Building Modes?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you were building one or more new transportation modes.

- **Fixed Guideway Bus?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you operate bus service over fixed guideway.

- **High Intensity Bus?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you operate high-intensity bus service.

- **Less Than 31 VOMS?**
  - [ ] Yes
  - [ ] No
  
  Select "Yes" if you operate less than 31 total annual maximum vehicles.

### Resulting Reporter Type

| Reporter Type | Full Reporter: Operating |
Reporter Type Questionnaire

- 5307 beneficiary?
- Reporting under another NTD ID?
- Operating public transit service?
- Building new modes?
- Fixed guideway or high intensity bus or both?
- Operating less than 31 VOMS?
Complete Kickoff

Click submit to complete kickoff

Report Year Kickoff Completed

Thank you for completing your Report Kickoff.
Ridership Activity Form (MR-20)

- Collected by mode and TOS
- Provides FTA with monthly trends in passenger usage and service levels
- Submit data by the end of the month for the previous month
  - For example, September data are submitted by the last day of October
MR-20 Data Items

• Report:
  – Unlinked passenger trips (UPT)
  – Actual vehicle revenue miles (VRM) and vehicle revenue hours (VRH)
    • Car miles/hours for rail modes
  – Vehicles operated in maximum service (VOMS)
• Total data reported must be consistent with annual total in S-10
Access MR-20 Report Package

• Go to News tab
• Look under [Analyst email] Report Year 2015 (Original Submission) is now available
  – Will show Report Year 2014 for systems still their RY 2014
• Click left box to go to Summary Screen
Report Package Summary Screen

- Click **Related Actions** to go to report packages screen

![Report Package Summary Screen](image-url)
Report Packages Screen

- Click **Monthly Ridership forms**

Click to access individual mode/TOS forms
Individual MR Forms by Mode/TOS

- Check box for specific mode/TOS
- Then click **View Form**

1. Click to mode/TOS forms
2. Click View Form
MR-20 Data Entry Form

- Data Entry Options
  - Submit
  - Save (can still be changed prior to submission)
- Submission dates/submitter name automatically generated by system
Print Document

- Creates HMTL file (copy of form) for downloading
- Can either:
  - View file in browser
  - Print file
### 00008 - Tri-County Metropolitan Transportation District of Oregon > RY 2015 Report Package > 2015 LR-DO Monthly Ridership Form for Tri-County Metropolitan Transportation District of Oregon

<table>
<thead>
<tr>
<th>Form</th>
<th>UPT</th>
<th>VRM</th>
<th>VRH</th>
<th>VOMS</th>
<th>First Submission</th>
<th>Last Submission</th>
<th>Submitted By</th>
<th>Open Issues</th>
<th>Open Issues w/ Expl</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-July</td>
<td>3,470,400</td>
<td>660,999</td>
<td>45,259</td>
<td>104</td>
<td>8/11/2014</td>
<td>8/11/2014</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Open</td>
</tr>
<tr>
<td>2014-August</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014-September</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[View Printable Version of Form - [as of 10/2/2014 5:43 PM EDT]](link)

Click to download HTML copy
### Issue Checks

- Checks run when data saved
- Count shown in *Open Issues*

<table>
<thead>
<tr>
<th>Form</th>
<th>UPT</th>
<th>VRM</th>
<th>VRH</th>
<th>VOMS</th>
<th>First Submission</th>
<th>Last Submission</th>
<th>Submitted By</th>
<th>Open Issues</th>
<th>Open Issues w/ Expire</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-July</td>
<td>11,487,289</td>
<td>3,390,849</td>
<td>330,796</td>
<td>1,290</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>0</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

[Click to save]
Addressing Issue Checks

1. Click on **Details**

2. Click on **View Issues**

- **Click on Details**
  - **Percentage Changes** displays

- **Click on View Issues**
View Validation Issues

1. Select issue
2. Click on View

- Select issue
- Click on View to address issue
Address Single Issue

1. Provide explanation
2. Click on save
National Transit Database Offices

• **NTD Operations Center**
  – Charlottesville, Virginia
  – Monday to Friday: 0800 – 1900 Eastern
  – (888) 252-0936
  – NTDHelp@dot.gov

• **NTD Program Office**
  – Washington, DC
  – Keith Gates, Program Manager
  – (202) 366-1794
  – keith.gates@dot.gov

*Me, email works best*

*NTD Help Desk*
Additional Training

• NTD Website training page:
  http://www.ntdprogram.gov/ntdprogram/seminars.htm

• National Transit Institute, NTD courses:
  http://www.ntionline.com/courses/courseinfo.php?id=7

• NTD Website presentations page:
  http://www.ntdprogram.gov/ntdprogram/announcements.htm