

FTA

FEDERAL TRANSIT ADMINISTRATION

TrAMS User Roles and User Management

Training Webinar for FTA Recipients

February 16 and 18, 2016



U.S. Department of Transportation
Federal Transit Administration

Session Overview

- Discuss TrAMS user roles and responsibilities
- Demonstrate how to find out what roles you and your colleagues have been assigned.
- What to do if you have not yet received access to TrAMS.
- How to select a User Manager
- User Manager Functions:
 - Adding a new user
 - Modifying an existing user's roles
 - Deactivating users
 - Reactivating users

Please be advised information is subject to change and enhancements may be incorporated in the future. Please refer to the FTA TrAMS website for guidance, updates and corrections to related to TrAMS.

Thank you for your understanding and cooperation.
www.fta.dot/TrAMS

User Access and User Role Resources on the FTA Website

<http://www.fta.dot.gov/TrAMS> includes:

- A list of FTA Local Security Managers (LSM) in each FTA region and headquarters office.
- A handbook for recipient User Managers
- Instructions for how to request a User Manager for your organization.
- Delegation of authority templates for the User Manager and additional TrAMS roles.
- The TrAMS User Manual

Some Context: FTA Grantee User Access in TEAM

Transportation Electronic Award Management System (TEAM) Grantee / Recipient User Access Request

Check Applicable Box:	<input type="checkbox"/> New User With Pin	<input type="checkbox"/> Modify User	<input type="checkbox"/> Username
	<input type="checkbox"/> New User Without Pin	<input type="checkbox"/> Delete User	<input type="checkbox"/> Name Change Request

Warning: The information contained in this form is protected under Public Law 93-576, Privacy Act.

USER INFORMATION

First Name*	MI	Last Name*	Gender (Optional) M F P O
Office Phone*		FAX Number	
Organization Name*	Recipient ID	Email Address*	
Mailing Address (Street Number, City, State and ZIP Code)*		User's Authorizing Signature (see instructions)	
		Printed Name of above	
		Date	

This information is required to establish or modify your TEAM user account. By completing this form, you authorize FTA that information provided is true and complete to the best of your knowledge. Credit information will be grounds for refusal to establish a new user account or the basis for deletion of an existing TEAM account.

APPLICATION ACCESS (Check all that apply):

<input type="checkbox"/> Production	<input type="checkbox"/> Recipient PIN Functions	<input type="checkbox"/> Designated Recipient ID(s) (Indicate Below)
<input type="checkbox"/> Quality Assurance	<input type="checkbox"/> Submit Application	
<input type="checkbox"/> Both Production and QA	<input type="checkbox"/> Execute Awards	
<input type="checkbox"/> Recipient Access Type	<input type="checkbox"/> Certify as Lawyer	
<input type="checkbox"/> Invoicing Only	<input type="checkbox"/> Certify as Official	
<input type="checkbox"/> Ability/Update	<input type="checkbox"/> Certify as Both Lawyer and Official	
<input type="checkbox"/> Civil Rights (No PIN Needed)	<input type="checkbox"/> Provide Supplemental Agreement	
<input type="checkbox"/> MBE Reporting		<input type="checkbox"/> Metropolitan Planning Organization (MPO) ID

(PIN Functions require Designation of Signature Authority on Organization/Agency Letterhead. See Instructions).

ACKNOWLEDGMENT OF RULES OF CONDUCT FOR SYSTEM USE

As a TEAM user, I understand that I am personally responsible for the use and misuse of my TEAM login ID and password. I understand that by requesting TEAM access and accepting/using such access that I must comply with the following:

- When downloading sensitive information, I will ensure that the information has the same level of protection as FTA applications.
- I will not permit anyone to use my TEAM access information (i.e. user ID, password or other authentication). My password (or other authentication) will be kept private, not stored in a place that is accessible by anyone other than myself (i.e. family members, friends, etc.). If stored, the password will not be in text format.
- I will follow standard password procedures and change my password every sixty (60) days. My passwords will be at least twelve (12) alphanumeric characters and contain at least three of the following: one (1) capital letter, one (1) lower case letter, one (1) number and one (1) special character.
- I will report any security problems and anomalies in system performance to the appropriate FTA Office.
- I will notify the appropriate FTA Office to eliminate my TEAM access in the event of job transfer, termination, or if TEAM access is no longer required.
- I understand that if I am not using FTA-supplied equipment and FTA suffers a security breach or compromise that is my fault, I may be required to allow access to my equipment by authorized representative of the Federal Government to determine the causes and to take corrective action(s).
- I will lock my workstation when I leave the vicinity and not leave the application open and vulnerable to intrusion by a third party.
- I agree to and will comply with all of these conditions and understand that failure to do so will result in permanent removal of my TEAM access, and may result in other disciplinary or legal action. By signing my name in the space below, I hereby acknowledge this agreement, and certify that I understand the preceding terms and provisions and that I accept the responsibility of adhering to the same.

Signature: _____ Date: _____ Printed Name: _____

FTA AUTHORIZATION

FTA Functional Approval	FTA Operational Approval
Signature of Authorizing FTA Official: _____	Signature of Authorizing FTA Official: _____
Printed Name: _____	Printed Name: _____
Title / Office: _____	Title / Office: _____
	Date Processed: _____ User ID: _____

TEAM RECIPIENT User Access Request Form
Revised: 4/2014

FTA User Access in TEAM

View/Modify User (Kathi Williams) - Internet Explorer

Modify User

General Info Security Info **FTA/Recipient Info** Roles/Privileges

Cost Centers:

Primary	Auxiliary
78900	

Recipient IDs:

Primary	Auxiliary
7016	6674
6235	
6674	

View/Modify User (Kathi Williams) - Internet Explorer

Modify User

General Info Security Info **FTA/Recipient Info** Roles/Privileges

Database: **Production**

User's Role: Recipient FTA Other

<input checked="" type="checkbox"/> Recipient Functions	<input type="checkbox"/> FTA Functions
<input checked="" type="checkbox"/> Submit	<input type="checkbox"/> Award
<input checked="" type="checkbox"/> Execute	<input type="checkbox"/> Deobligate
<input type="checkbox"/> Certify as Lawyer	<input type="checkbox"/> Approve Budget Revision
<input checked="" type="checkbox"/> Certify as Official	<input type="checkbox"/> Maintain All Projects
<input type="checkbox"/> Certify as Both	<input type="checkbox"/> FPC Transfer
<input type="checkbox"/> Supplemental Agreement	<input type="checkbox"/> Legal Concurrence
<input type="checkbox"/> Help Desk	<input type="checkbox"/> Accounting
<input type="checkbox"/> Local Security Manager	<input type="checkbox"/> Maintain Funds Control
<input checked="" type="checkbox"/> Civil Rights	<input type="checkbox"/> Approve Advice
<input checked="" type="checkbox"/> DBE Reporting	<input type="checkbox"/> Approve Operating Budget
<input type="checkbox"/> Department of Labor	
<input type="checkbox"/> Auditor	
<input type="checkbox"/> Earmark Administration	
<input type="checkbox"/> Earmark HQ Mgr	
<input type="checkbox"/> Earmark Financial Mgr	

Changes/Similarities between TEAM and TrAMS

Changes

- No more paper user access forms.
- Less manual data entry for FTA staff.
- Greater ability for recipient staff to grant access to TrAMS to their colleagues, assign and modify roles, and deactivate colleagues without having to contact FTA.

Similarities

- Some roles (user manager, official, attorney, submitter) still require a delegation of authority letter and FTA approval prior to being assigned in TrAMS.
- FTA local security managers can still set up recipient staff and modify roles if necessary.

TrAMS User Roles & Tasks

- Role Assignment determines what actions you take in the system and the tasks that will be assigned to you.
 - A person with the Official role will receive a task to Execute a Grant Agreement;
 - A person with the FFR reporter role will receive tasks to submit Federal Financial Reports.
- Users may have multiple roles.
- Your TEAM roles were migrated into TrAMS
- FTA has created some new user roles/functions that did not exist in TEAM
- Certain recipient roles require supporting documentation (Official, Attorney, and Submitter).

Recipient User Roles

TEAM Recipient/Grantee "Functions" seen on TEAM Request Form	<u>Equivalent TrAMS Recipient User Group/Role</u>	<u>LSM Review PIN Required</u>
NA	User Manager	NA
NA	Developer	NA
Submit	Submitter	Yes
Civil Rights/DBE Reporting	Civil Rights	NA
Execute	Official	Yes
Certify as Official	Official	Yes
Certify as Lawyer	Attorney	Yes
Certify as Both	Assign Both Attorney and Official	Yes
NA	FFR Reporter	NA
NA	MPR Reporter	NA

The Recipient User Manager

- Can add and remove roles to their own account.
- Can give TrAMS access to their colleagues.
- Can add and remove roles for their colleagues
- Can give the User Manager role to their colleagues (supporting documentation is required)
- Can deactivate their colleagues from TrAMS.
- Can update recipient points of contact information
- Will be required to reauthorize their users on an annual basis.
- An individual can be a User Manager for both TrAMS and the NTD.
- If you were identified as the User Manager in TEAM, FTA has assigned you the User Manager role in TrAMS.
- FTA will be reaching out to recipients who have not yet identified a user manager to ask them to do so.

Read Only

- Allows users to search information about their organization, it's grant awards and grant applications.
- Allows users to download attachments to the organizational profile or grants.
- Allows users to run data reports in order to query information.
- Read-only users cannot take action to create or develop applications, submit reports, receive tasks, etc.

The Developer

- The Developer can create and edit all parts of an application and its associated projects.
- The Developer cannot transmit applications for FTA initial review or formally submit applications for FTA final review (unless the developer also has the Submitter role).
- The Developer can also create, modify and submit budget revisions to active grants.
- All active TEAM users as of November 30, 2015 who were migrated into TrAMS were assigned the Developer role by default.
- The User Manager can provide a new TrAMS user the developer role without a delegation of authority letter or LSM approval.
- User Managers can also remove the developer role from users who do not need it.

The Submitter

- The submitter can create and edit all parts of an application and its associated projects.
- The submitter can transmit a draft application for FTA initial review.
- The submitter can formally submit an application for final FTA review (requires a PIN).
- The submitter can also create, modify and submit budget revisions to active grants.
- An individual with the “submit” role in TEAM was provided the “submitter” role in TrAMS.
- If you did not have the “submit” role in TEAM, adding the submitter role requires a delegation of authority letter and FTA LSM approval.

The Official

- This role is typically provided to the recipient's CEO or equivalent, or a designee.
- The Official will execute the recipient's annual certifications and assurances (a PIN is required).
- The Official will execute grant agreements once the grant is awarded by FTA.
- Anyone with the "official" role in TEAM was provided the "official" role in TrAMS.
- If you did not have the "official" role in TEAM, adding the submitter role requires a delegation of authority letter and FTA LSM approval.

The Attorney

- This role is typically assigned to the agency's Chief Counsel or equivalent.
- The Attorney will execute the recipient's annual certifications and assurances (a PIN is required).
- Individuals who had the ability in TEAM to PIN C&A's for the official and the attorney can do so in TrAMS.
- Anyone with the "attorney" role in TEAM was provided the "official" role in TrAMS.
- If you did not have the "attorney" role in TEAM, adding the submitter role requires a delegation of authority letter and FTA LSM approval.

Civil Rights

- Individuals in the Civil Rights (CR) role are responsible for:
- Developing and submitting Civil Rights program information to FTA.
- Developing and submitting triennial DBE goals and methodology (if applicable).
- Developing and submitting DBE goal reports.
- Individuals with the civil rights and DBE reporter role will be given the Civil Rights role in TrAMS.
- The User Manager can provide a new TrAMS user the civil rights role without a delegation of authority letter or LSM approval.

The FFR Reporter

- The FFR reporter is responsible for submitting monthly, quarterly, or annual FFRs.
- FFR reporters will receive a task and auto-notification the first day of the reporting period (i.e. April 1 for grants being reported on quarterly) for each grant/cooperative agreement that needs to be reported on.
- All active TEAM users as of November 30, 2015 who were migrated into TrAMS were assigned the FFR Reporter role by default.
- The User Manager can provide a new TrAMS user the FFR Reporter role without a delegation of authority letter or LSM approval.
- User Managers can also remove the FFR Reporter from users who do not need it.

The MPR Reporter

- The MPR reporter is responsible for submitting monthly, quarterly, or annual MPRs.
- MPR reporters will receive a task and auto-notification the first day of the reporting period (i.e. April 1 for grants being reported on quarterly) for each grant/cooperative agreement that needs to be reported on.
- All active TEAM users as of November 30, 2015 who were migrated into TrAMS were assigned the MPR Reporter role by default.
- The User Manager can provide a new TrAMS user the MPR Reporter role without a delegation of authority letter or LSM approval.
- User Managers can also remove the MPR Reporter from users who do not need it.

FTA User Roles

- Supervisor
- Local Security Manager
- Read Only
- Intake Manager
- Pre-Award Manager
- Post-Award Manager
- Initial Reviewer
- Environmental Reviewer
- Technical Reviewer
- Civil Rights Reviewer
- Director
- Director of Operations
- Reservationist
- Legal Counsel
- Administrator
- Budget Director (HQ)
- Budget Analyst (HQ)
- Vendor Setup (HQ)
- Discretionary Administrator (HQ)
- DBE Reviewer (HQ)
- TCA Recorder (HQ)

The Local Security Manager (LSM)

Within their program office, LSMS can:

- Can activate/deactivate FTA Users
- Can Assign and Approve FTA User Roles
- Create New Recipient System Users
- Add Recipient Users to Recipient Organizations
- Activate/Deactivate Recipient Users
- Assign and/or approve Recipient User Roles submitted by the User Manager
- Assign/Revoke Recipient User Managers Rights
- Recertify Recipient Users and User Managers

The LSM/UM Relationship

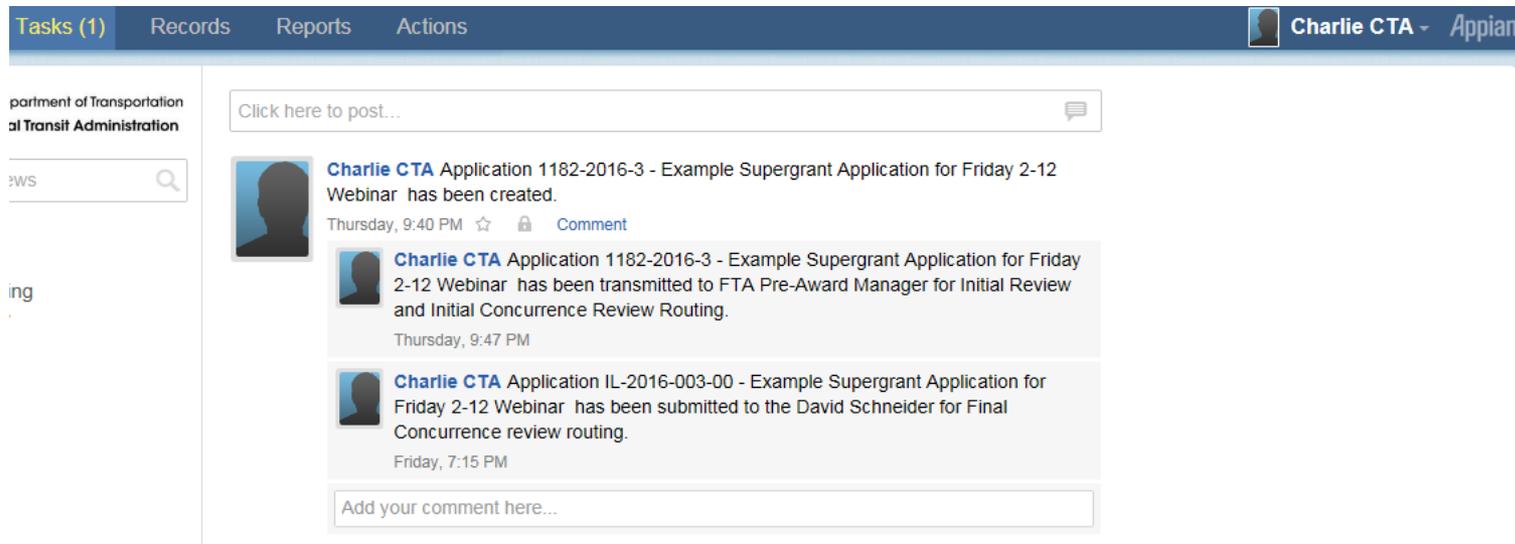
- The User Manager (UM) is responsible for adding new users and managing users on behalf of their organization.
- The LSM may assist, but may not act as a UM on behalf of an organization, except in certain circumstances (initial set up for a new organization).
- The LSM is responsible for reviewing and approving role assignment requests which require a PIN function that the UM has initiated electronically via TrAMS.

Gaining Access to TrAMS

- All active TEAM users received an email from FTA.TrAMS.Help@dot.gov with instructions on how to log on.
- An “active” TEAM user was a user whose last log-in was on or after October 1, 2013.
- We emailed the instructions to your TEAM email address.
- If you did not receive the instructions to log into TrAMS
 - The email might be in your SPAM folder.
 - You might not have been a TEAM user.
 - Your TEAM account might not have been active.
 - The TEAM email on file for you may be out of date.
- Contact your organization’s user manager. If you don’t have one, contact your FTA LSM.
- Your user manager or LSM can create a new account for you in TrAMS if necessary.

Taking a look at your roles (Step 1 of 3)

- From the News page, click on your name and click “profile.”



The screenshot shows a user profile page for 'Charlie CTA' in a system interface. The top navigation bar includes 'Tasks (1)', 'Records', 'Reports', and 'Actions'. The user's name 'Charlie CTA' and the company 'Appian' are visible in the top right. The main content area displays a list of news items:

- Charlie CTA** Application 1182-2016-3 - Example Supergrant Application for Friday 2-12 Webinar has been created.
Thursday, 9:40 PM ☆ 🔒 Comment
- Charlie CTA** Application 1182-2016-3 - Example Supergrant Application for Friday 2-12 Webinar has been transmitted to FTA Pre-Award Manager for Initial Review and Initial Concurrence Review Routing.
Thursday, 9:47 PM
- Charlie CTA** Application IL-2016-003-00 - Example Supergrant Application for Friday 2-12 Webinar has been submitted to the David Schneider for Final Concurrence review routing.
Friday, 7:15 PM

At the bottom of the news list is a text input field labeled 'Add your comment here...'. On the left side of the page, there is a sidebar with a search bar and some partially visible text: 'partment of Transportation al Transit Administration', 'ews', and 'ing'.

Taking a look at your roles (Step 2 of 3)

- Click on “User Details”

The screenshot shows a user profile page for Charlie CTA. The top navigation bar includes 'News', 'Tasks (1)', 'Records', 'Reports', and 'Actions'. The user's name 'Charlie CTA' and the system 'Appian' are displayed in the top right. The left sidebar shows the 'U.S. Department of Transportation Federal Transit Administration' logo and a 'Summary' section with links for 'News', 'Related Actions', and 'User Details'. The main content area shows the breadcrumb 'Records / Users / CTA, Charlie' and the user's name 'CTA, Charlie'. Below this is a profile card with a placeholder for a profile picture, the name 'Charlie CTA', email 'charlie.cta720@gmail.com', and phone number '202-493-0175 (Office)'. At the bottom of the card are statistics for 'Followers', 'Following', and 'Kudos', all showing '0'. An 'Add blur' button is visible on the right side of the card. Below the card is a section for 'Latest News'.

Taking a look at your roles (Step 3 of 3)

TrAMS will display your contact information and roles you have been assigned.

The screenshot shows the TrAMS user profile for Charlie CTA. The page has a navigation bar with 'News', 'Tasks (1)', 'Records', 'Reports', and 'Actions'. The user's name 'Charlie CTA' and the provider 'Appian' are shown in the top right. A sidebar on the left contains 'Summary', 'News', 'Related Actions', and 'User Details >'. The main content area is titled 'CTA, Charlie' and is divided into three sections: 'User Information', 'Organizations', and 'Roles'.

User Information

Username (Email)	charlie.cta720@gmail.com	Work Phone	202-493-0175
Honorific	Mr	Status	Active
Full Name	Charlie C CTA		
Email	charlie.cta720@gmail.com		
Created On	2/3/2016		
Last Certified On	2/3/2016		

Organizations

Organization	Application	User Manager
Chicago Transit Authority	TrAMS	No

Roles

Role Names
Developer, Chicago Transit Authority
Submitter, Chicago Transit Authority
Official, Chicago Transit Authority

Taking a look at the roles of your colleagues (Step 1 of 4)

- From the “Records” tab, select the “Recipient Organizations” link.



The screenshot shows a web application interface for the U.S. Department of Transportation Federal Transit Administration. The top navigation bar includes tabs for 'News', 'Tasks (1)', 'Records' (which is highlighted), 'Reports', and 'Actions'. On the right side of the navigation bar, there is a user profile for 'Charlie CTA' and the name 'Appian'. Below the navigation bar, the main content area is titled 'Records' and contains a list of five categories, each with a folder icon and a description:

- Applications / Awards**: List of All Applications / Awards for Your Organization
- Projects**: List of All Projects for Your Organization
- Recipient Organization**: View Profile Information for Your Organization
- Static Reports**: List of TrAMS Excel Reports and Archived Reports from TEAM
- Users**: Directory of users

On the left side of the main content area, there is a sidebar with the FTA logo and the text 'U.S. Department of Transportation Federal Transit Administration' and 'All >'.

Taking a look at the roles of your colleagues (Step 2 of 4)

- Select the organization you work for (or have access to).

Tasks (1) Records Reports Actions Charlie CTA - Appian

Department of Transportation
Federal Transit Administration

Recipient Organization

Ch Chicago Transit Authority | CTA
Recipient ID: 1182
TrAMS Status: Active
SAM Status: ACTIVE

Taking a look at the roles of your colleagues (Step 3 of 4)

- Click the “TrAMS Users” link on the left hand side of the recipient profile home page.

News Tasks (1) **Records** Reports Actions

Charlie CTA - Appian

U.S. Department of Transportation
Federal Transit Administration

Records / Recipient Organization
Chicago Transit Authority | CTA Follow

TrAMS Profile Information

Recipient ID 1182	TrAMS Status Active
Recipient Acronym CTA	Geographic Location Code 170311670
Recipient Alias CHICAGO TRANSIT AUTHORITY	NTD Code 5066
Recipient Cost Center 78500	Is MPO? No
Is State DOT? No	Recipient ID of MPO 0
Recipient OST Type Transit Authority	Is DBE? Yes
Is Designated Recipient? Yes	Assistance? Yes

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

Taking a look at the roles of your colleagues (Step 4 of 4)

- TrAMS Will Display a grid of your organization's users in a grid, along with the roles they have been given and the Recipient IDs they are associated with.

The screenshot shows the TrAMS interface for the Chicago Transit Authority (CTA) recipient organization. The page is titled "Records / Recipient Organization" and "Chicago Transit Authority | CTA". It includes a "Follow" button and a "Recipient Information" section with the following details:

- Recipient ID: 1182
- Recipient Name: Chicago Transit Authority
- Recipient DUNS: 005532205
- Acronym: CTA

Below the recipient information is a "Users" section containing a table of users:

First Name	Last Name	Email	Phone	User Roles
Mirka	Juszczuk	mjuszczuk@transitchicago.com	312.681.3557	MPR Reporter, 1182 FFR Reporter, 1182
Maria	Bruno	mbruno@transitchicago.com	312.681.3556	MPR Reporter, 1182 FFR Reporter, 1182
Upen	Joshi	ujoshi@dminc.com	5645123659	Developer, 1182 Submitter, 1182 Official, 1182 MPR Reporter, 1182 FFR Reporter, 1182
Alison	Multi-Test	alison_test2@yahoo.com	202-555-1234	Developer, 1101 Developer, 1182 Developer, 1369 Developer, 1547 Developer, 6603

What if you see a TrAMS user that you do not recognize?

- The person may work for another organization (such as a State DOT or MPO) that had access to your organization in TEAM or was granted access to your organization in TrAMS.
- The person may work for an FTA contractor, such as our Project Management Oversight or Triennial Review contractors.
- FTA contractors have been granted read-only access to TrAMS.
- Recipient user managers must not deactivate or modify the roles of an FTA contractor.
- If you have questions about a user and their roles in TrAMS, contact your FTA LSM.

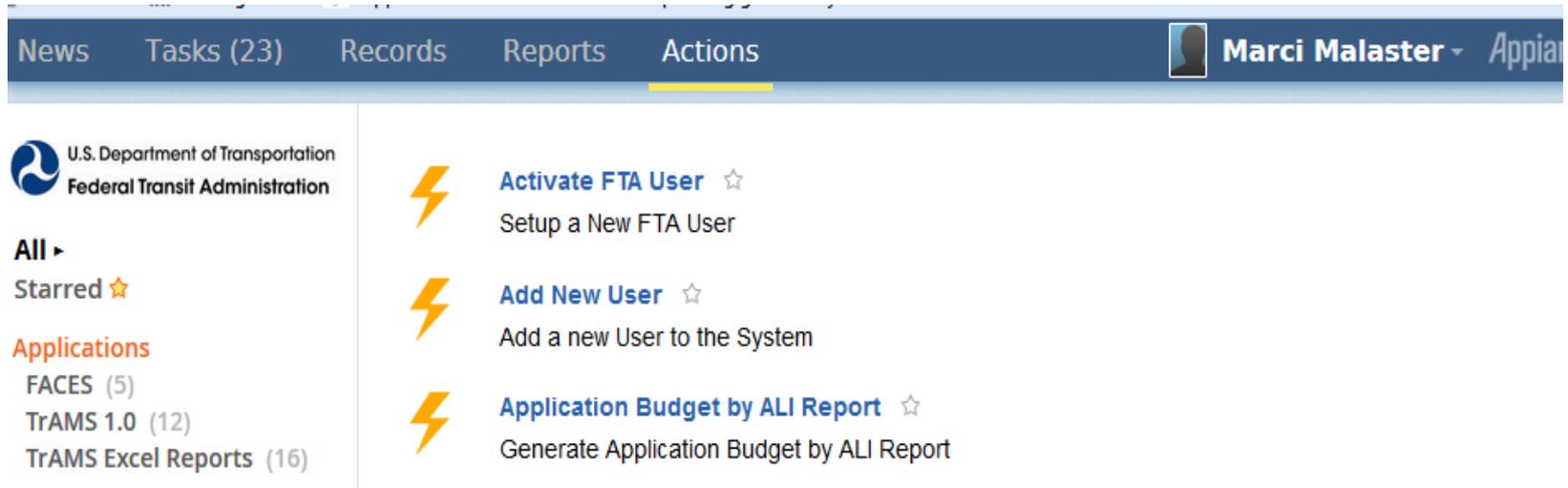
Setting up a User Manager for your Organization

- If your organization does not yet have a TrAMS user manager:
- 1. Go to <http://www.fta.dot.gov/TrAMS>.
- 2. Download the user manager instructions and delegation of authority letter.
- 3. Identify who will be the User Manager(s) for your organization (preferably an existing TrAMS user).
- 4. Have your CEO list these individuals in the delegation of authority letter and sign the letter.
- 5. Email or fax the letter to your FTA LSM.
- 6. Your FTA LSM will set up the individual as a user manager in TrAMS.

User Manager Responsibilities

Adding a New User (Step 1 of 3)

From the “Actions” Tab, click the “Add New User” link.



The screenshot shows the top navigation bar of the FTA system with tabs for News, Tasks (23), Records, Reports, and Actions. The Actions tab is selected and highlighted. In the top right corner, the user profile for Marci Malaster is visible. Below the navigation bar, the left sidebar displays the U.S. Department of Transportation Federal Transit Administration logo and a list of application categories: All, Starred, Applications (including FACES, TrAMS 1.0, and TrAMS Excel Reports). The main content area shows three action items, each with a yellow lightning bolt icon and a star icon: 'Activate FTA User' (Setup a New FTA User), 'Add New User' (Add a new User to the System), and 'Application Budget by ALI Report' (Generate Application Budget by ALI Report).

News Tasks (23) Records Reports **Actions**

 **Marci Malaster** - Appia

 U.S. Department of Transportation
Federal Transit Administration

All ▶
Starred ★
Applications
FACES (5)
TrAMS 1.0 (12)
TrAMS Excel Reports (16)

-  **Activate FTA User** ☆
Setup a New FTA User
-  **Add New User** ☆
Add a new User to the System
-  **Application Budget by ALI Report** ☆
Generate Application Budget by ALI Report

Adding a New Recipient User (Step 2 of 3)

Complete the New User Form; all required fields have an asterisk *

1. User Name: This is the individual's business email address, it must be lower case.
2. Email: This will automatically populate once you enter the business email address, it will be the same information.
3. Honorific: This is generally, Mr., Ms. Miss, Dr., etc....

Tasks (2) Records Reports Actions Charlie CTA Appian

Personal Administration

To add a new system user please complete all required fields below and click the "Next" button at the bottom of the form. If you do not want the user to be notified of the newly created account, uncheck the box for the "Notify User Upon Account Creation?" question.

yes

Add New User Progress

Add New User Confirm New User

User Information

Username (Email) *
christopher.cta@fake.com

Address 1

Address 2

Honorific *
Mr

PO Box

First Name *
Chris

City

Middle Name
C

State
Select a State

Last Name *
CTA

Zip Code

Title *
User

Zip Code Extension

Email *
christopher.cta@fake.com

Primary Organization
Chicago Transit Authority

Work Phone *
202-333-3333

Adding a New User (3 of 3)

Select the roles that the user will be assigned in TrAMS. You can also provide comments for the FTA LSM.

The screenshot shows the 'Update Grantee User Account' page in TrAMS. The page header includes navigation tabs (News, Tasks (2), Records, Reports, Actions) and a user profile for Charlie CTA. The main content area is titled 'christopher.cta@fake.com | Update Grantee User Account' and contains three sections: 'User Profile Information', 'Current Roles', and 'Select Roles To Add'. The 'User Profile Information' section displays fields for Username, Title, First Name, Last Name, Email, Address, City, State, Zip Code, and Work Phone. The 'Current Roles' and 'Select Roles To Remove' sections both indicate that there are no available roles. The 'Select Roles To Add' section is a table with four rows, each with a checkbox and a role name.

<input type="checkbox"/>	Role Names
<input type="checkbox"/>	Developer, Chicago Transit Authority
<input type="checkbox"/>	Submitter, Chicago Transit Authority
<input type="checkbox"/>	Attorney, Chicago Transit Authority

Adding a New User (3 of 3)

- If you are requesting the user be granted the user manager, official, attorney, or submitter role, TrAMS will prompt you to upload the delegation of authority letter.

The screenshot shows a web application interface for the U.S. Department of Transportation Federal Transit Administration. The top navigation bar includes 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. The user is logged in as 'Charlie CTA' using 'Appian'. The main content area is titled 'christopher.cta@fake.com | Update Grantee User Account - User Role Justification Documents'. Below the title, there is a sub-header 'Roles' and a text input field containing 'Submitter, Chicago Transit Authority'. A section titled 'Upload User Role Justification Documents *' contains a file upload field with a 'Browse...' button. At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons.

Modifying an Existing Users' TrAMS Roles

Step 1 of 6: Search and Select Users

Use the **Records** Tab and select the **Users** option from the menu.

- For User Managers they will only see users in their organization



Step 2 of 6: Identify and Select a User

The first 100 names will populate; so to narrow the search, you can use the Status filters to select active or inactive users or Enter a name in the search bar and enter to search for a specific name. Click on the [user name hyperlink](#) to access their profile.



The screenshot displays the 'Records' tab of a system interface for the U.S. Department of Transportation Federal Transit Administration. A search bar contains the text 'karisa'. Below the search bar, there are filter options for 'All' and 'Status' (Active, Inactive). A red arrow points from the search bar to the search results. The search results show a single entry for 'Loy, Karisa' with the location 'Washington, DC' and the email address 'karisa.loy.ctr@dot.gov'. The 'Users' section is titled 'Showing search results for karisa'.

Users	
Showing search results for karisa	
	Loy, Karisa Washington, DC karisa.loy.ctr@dot.gov

Step 3 of 6: Modifying User Roles

LSMs and User Manager for individuals in their organization can use the option for “User Details” in the sidebar menu to view current role assignments and which organizations they are associated.

The screenshot displays the FTA User Manager interface. At the top, there are navigation tabs: News, Tasks (25), Records (highlighted), Reports, and Actions. The main content area is divided into two columns. The left column is a sidebar menu with the following items: U.S. Department of Transportation Federal Transit Administration logo, Summary >, News, Related Actions, and User Details (highlighted with a red box). The right column shows the user profile for Matt Long, including a profile picture, name, email (mallen.long@gmail.com), phone number (336-977-0425 Office), and buttons for Follow and Give Kudos. Below the profile, there are statistics for Followers (0), Following (0), and Kudos (0). At the bottom of the right column, there is a section for Latest News.

Step 4 of 6: Modifying User Roles

- To Modify (Add or Delete) User Roles, Select Related Actions from the sidebar menu.
- Select “Update User Roles” from the main menu.
- This option is the same for FTA and UMs.

The screenshot displays the user management interface for the U.S. Department of Transportation Federal Transit Administration. The top navigation bar includes 'News', 'Tasks (25)', 'Records' (highlighted), 'Reports', and 'Actions'. The left sidebar contains a 'Related Actions' menu with options for 'Summary', 'News', 'Related Actions', and 'User Details'. The main content area shows the user profile for 'Long, Matt' with a 'Follow' button. Below the profile, there are four action items, each with a lightning bolt icon: 'Edit User Profile' (Edit Profile Information for this User), 'Deactivate User' (Deactivate this User from the System), 'Assign User Manager Privileges' (Assign User Management Privileges to this User), and 'Update User Roles' (Process to update user roles). The 'Update User Roles' option is highlighted with a red rectangular box.

Step 5 of 6: You can now select the box to remove or add roles, then select the submit button.

ation
tion

mallen.long@gmail.com | Update Grantee User Account

User Profile Information

Username	mallen.long@gmail.com	Address	
Title	Lord	City	
First Name	Matt	State	New Hampshire
Last Name	Long	Zip Code	
Email	mallen.long@gmail.com	Work Phone	336-977-0425

Current Roles

Role Names
Submitter, Red Lake Band Of Chippewa Indians
Attorney, Red Lake Band Of Chippewa Indians

Select Roles To Remove

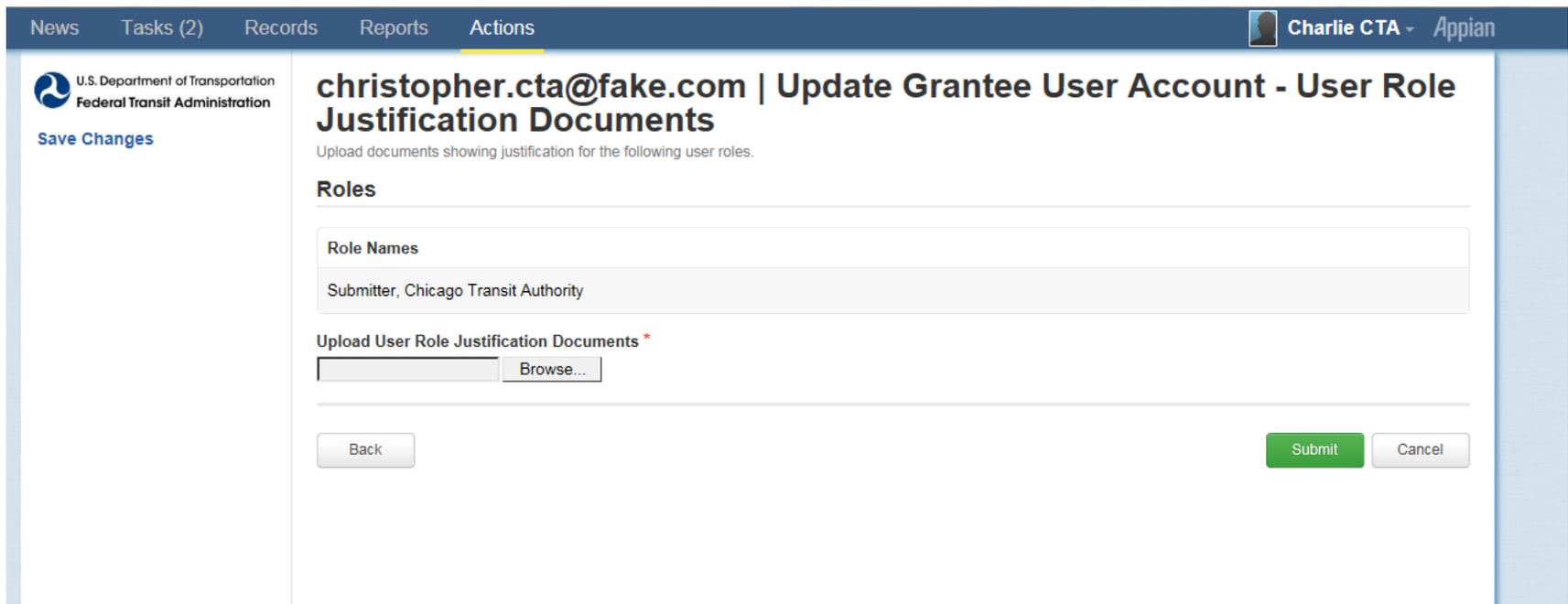
<input type="checkbox"/>	Role Names
<input type="checkbox"/>	Submitter, Red Lake Band Of Chippewa Indians
<input type="checkbox"/>	Attorney, Red Lake Band Of Chippewa Indians

Select Roles To Add

<input type="checkbox"/>	Role Names
<input type="checkbox"/>	Developer, Red Lake Band Of Chippewa Indians
<input type="checkbox"/>	Official, Red Lake Band Of Chippewa Indians
<input type="checkbox"/>	MPR Reporter, Red Lake Band Of Chippewa Indians

Step 6 of 6: Submit

- If you are requesting the user be granted the user manager, official, attorney, or submitter role, TrAMS will prompt you to upload the delegation of authority letter.



The screenshot shows a web application interface for the Federal Transit Administration. The top navigation bar includes 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. The user is logged in as 'Charlie CTA' using 'Appian'. The main heading is 'christopher.cta@fake.com | Update Grantee User Account - User Role Justification Documents'. Below the heading, there is a sub-heading 'Roles' and a text area containing 'Submitter, Chicago Transit Authority'. A section titled 'Upload User Role Justification Documents *' features a file input field and a 'Browse...' button. At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons.

LSM Review of User Role Assignment (Step 1 of 3)

- All UM actions to assign recipient roles that require a PIN will be transmitted to the LSM to review and confirm the assignment.
- The LSM will receive an email and Task notification.

News Tasks (3) Records Reports Actions Matthew Long - Appian

U.S. Department of Transportation
Federal Transit Administration

Click here to send a task...

Assigned to Me ▾
Sent by Me
Starred ☆

Status
Open ×

Deadline
Overdue
Today
Within 7 days

TrAMS FTA Region 5 - Local Security Manager (LSM)
Review Role Change Request For marisol.simon@dot.gov (made by brian.downey@dot.gov)
A moment ago ☆

TrAMS FTA Office of Budget and Policy - Local Security Manager (LSM), TrAMS FTA Office of Program Management - Local Security Manager (LSM), TrAMS FTA Region 1 - Local Security Manager (LSM), 2 others...
Review Role Change Request For marci.malaster@dot.gov (made by marci.malaster@dot.gov)
Aug 16, 2015 ☆

TrAMS FTA Office of Budget and Policy - Local Security Manager (LSM), TrAMS FTA Office of Chief Counsel - Local Security Manager (LSM), TrAMS FTA Office of Congressional Affairs - Local Security Manager (LSM), 4 others...
Review Role Change Request For matthew.daniel (made by matthew.daniel)
May 28, 2015 ☆

Newest ▾

LSM Review of FTA User Role Assignment (Step 2 of 3)

- Note that Tasks go to the LSM group for a cost center, coordination may be required.
- You must “Accept” the task to review the requested roles changes. “Go Back” will return the task to the queue.

The screenshot displays the FTA LSM interface. At the top, there is a navigation bar with tabs for News, Tasks (3), Records, Reports, and Actions. The user's name, Matthew Long, and the Appian logo are visible in the top right corner. The main content area is titled "marisol.simon@dot.gov | Review Role Change Request". A blue banner at the top of the content area states "You must accept this task before completing it" and includes "Accept" and "Go Back" buttons. Below the banner, the user profile information is displayed in a table format. The current roles are listed in a table below the profile information.

User Profile Information	
Username	marisol.simon@dot.gov
Title	Regional Administrator
First Name	Marisol
Last Name	Simon
Email	marisol.simon@dot.gov
Address	
City	Chicago
State	IL
Zip Code	60606
Work Phone	(312) 353-2790

Current Roles
Role Names
Supervisor, Region 5
Administrator, Region 5

LSM Approves User Roles Updates (Step 3 of 3)

News Tasks (3) Records Reports Actions Matthew Long - Appian

U.S. Department of Transportation
Federal Transit Administration

You have accepted this task. Return task to all assignees.

marisol.simon@dot.gov | Review Role Change Request

User Profile Information

Username	marisol.simon@dot.gov	Address	
Title	Regional Administrator	City	Chicago
First Name	Marisol	State	IL
Last Name	Simon	Zip Code	60606
Email	marisol.simon@dot.gov	Work Phone	(312) 353-2790

Current Roles

Role Names
Supervisor, Region 5
Administrator, Region 5

Roles To Be Removed

There are no available roles

Roles To Be Added

Role Names
Director, Region 5

Requestor Profile Information

Username	brian.downey@dot.gov	Address	
Title	None	City	
First Name	Brian	State	
Last Name	Downey	Zip Code	
Email	brian.downey@dot.gov	Work Phone	

Requestor Comments

Comments

Comments For Supervisor

Comments

Approve Reject

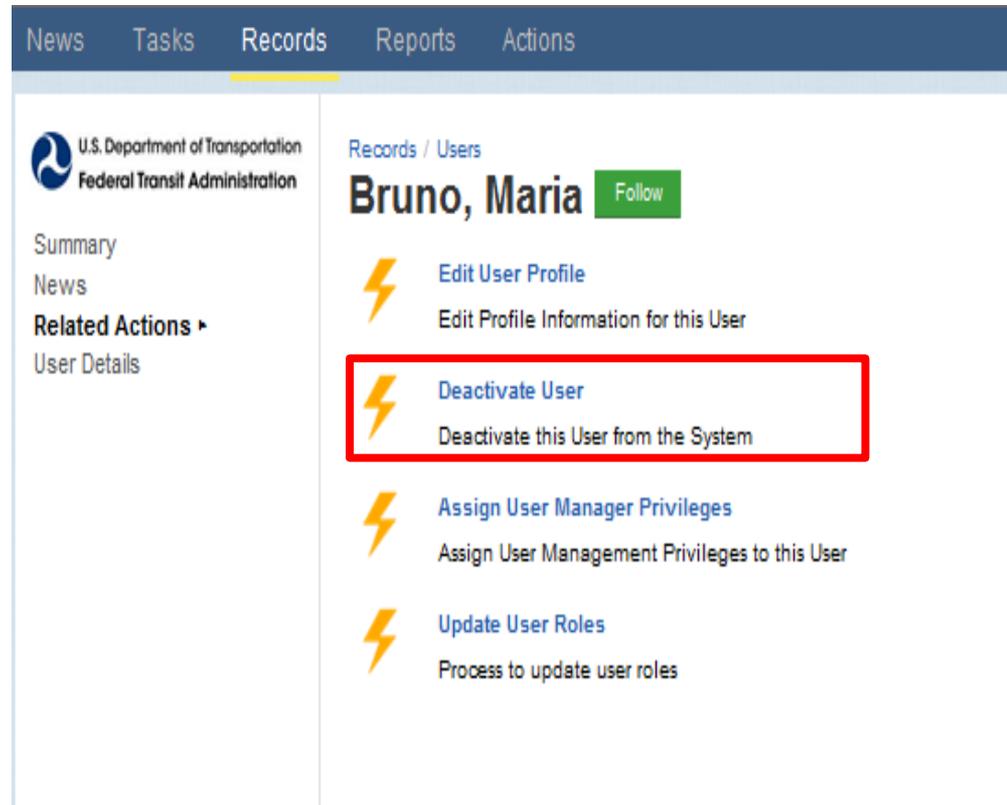
- Review the “Roles to be Added.” If you have any comments, type them into the “Comments” box.
- Click the “Accept” button to approve the change, if not, click “Reject” to return the request to the Supervisor or UM for review and resubmission. The comments are in the email (they do not “stick” to the user role module)

Reactivate / Deactivate Recipient Users

- Deactivating also removes them from NTD, if the user also works on NTD, simply remove the related TrAMS Roles. Do not deactivate the user

Deactivating Users in TrAMS (Step 1 of 2)

- To Deactivate a user; search for and select the User under the Records Tab.
- If the user is currently active, a “Deactivate User” selection will appear in their Related Actions. Select option.



The screenshot displays the TrAMS interface with the 'Records' tab selected. The left sidebar shows the 'U.S. Department of Transportation Federal Transit Administration' logo and navigation options: 'Summary', 'News', 'Related Actions', and 'User Details'. The main content area shows the user profile for 'Bruno, Maria' with a 'Follow' button. Below the profile, there are four action items, each with a lightning bolt icon: 'Edit User Profile' (Edit Profile Information for this User), 'Deactivate User' (Deactivate this User from the System), 'Assign User Manager Privileges' (Assign User Management Privileges to this User), and 'Update User Roles' (Process to update user roles). The 'Deactivate User' option is highlighted with a red rectangular border.

You may see a similar related action under the Actions Tab; however it currently does not provide a type ahead function (like the activate feature) to narrow down search. Until the search field is implemented use the Users Profile to deactivate Users.

Deactivating Users in TrAMS (Step 2 of 2)

- TrAMS will bring up a confirmation screen. Select “Submit” to deactivate the user. Once deactivated, the user will not have logon access to the system without being reactivated..

News Tasks (27) **Records** Reports Actions

Marci Malaster Appian

U.S. Department of Transportation
Federal Transit Administration

Summary
News
Related Actions ▶
User Details

Deactivate Users Confirmation

Please confirm the selected users to deactivate

Active Users

Username	First Name	Last Name
Rahman.Williams2015@dot.gov	Rahman	Williams

Submit Cancel

Reactivating a User (Step 1 of 2)

- Reactivating a user will restore their access to TrAMS.
- You can only reactivate on the user profile.
- The Related Actions “reactive user” option will populate if user was previously deactivated. Select Reactivate User.
- Note the prior user roles will be reinstated, review and modify as necessary.



The screenshot shows the TrAMS user profile interface. At the top, there is a navigation bar with tabs for News, Tasks (26), Records, Reports, and Actions. The user's name, Marci Malaster, is displayed in the top right corner. The main content area is divided into two columns. The left column contains the U.S. Department of Transportation Federal Transit Administration logo, a Summary section, and a Related Actions dropdown. The right column displays the user's name, Williams, Rahman, and a list of actions. A red box highlights the 'Reactivate User' option, which includes a lightning bolt icon and the text 'Reactivate this User in the System'.

Reactivating a User (Step 2 of 2)

- The following screen will populate, to confirm you want to reactivate the user click on the “Submit” button.

News Tasks (1) Records Reports Actions Karisa Loy Appian

U.S. Department of Transportation
Federal Transit Administration

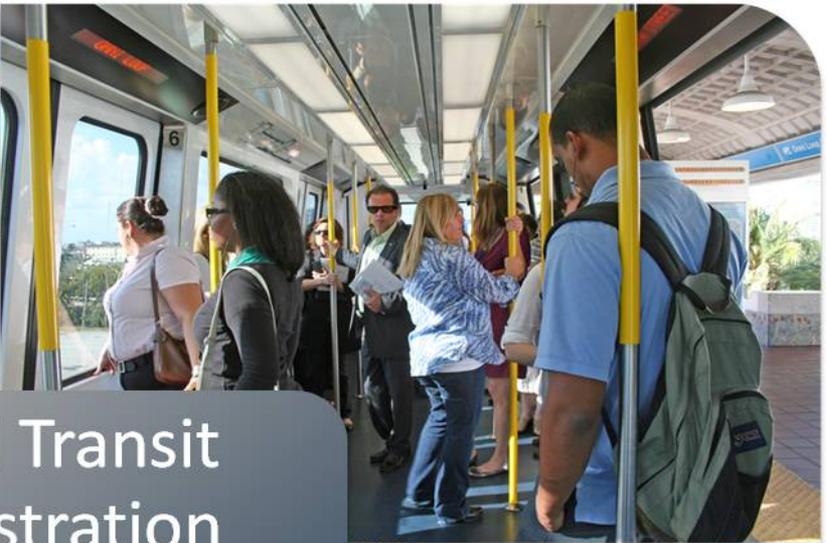
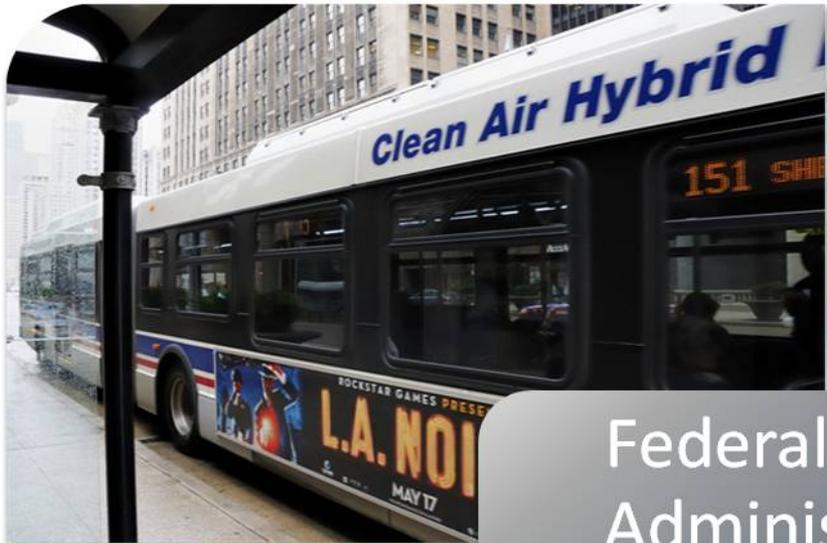
Reactivate User Confirmation

Please confirm the selected user to reactivate

Deactivated Users

Username	First Name	Last Name	Organization
mbruno@transitchicago.com	Maria	Bruno	Chicago Transit Authority

Submit Cancel



Federal Transit
Administration
www.fta.dot.gov



FTA

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