

FTA

FEDERAL TRANSIT ADMINISTRATION

TrAMS and NTD User Access Update for FTA Recipients

Tuesday November 14, 2017

Thursday November 16, 2017



U.S. Department of Transportation
Federal Transit Administration

Topics to be Covered

- User Information
- Manage Security Questions & Answers
- Manage PIN
- Create New User / Create Multiple Users
- Manage User Roles for an existing user
- Deactivate & Reactive Users
- Unlock users who are locked for 60+ days of inactivity
- Generate User Details Report
- System Record Features

User Access and Resources on the FTA Website

NTD information can be found at <https://www.transit.dot.gov/ntd>

TrAMS information can be found at: <http://www.transit.dot.gov/TrAMS>

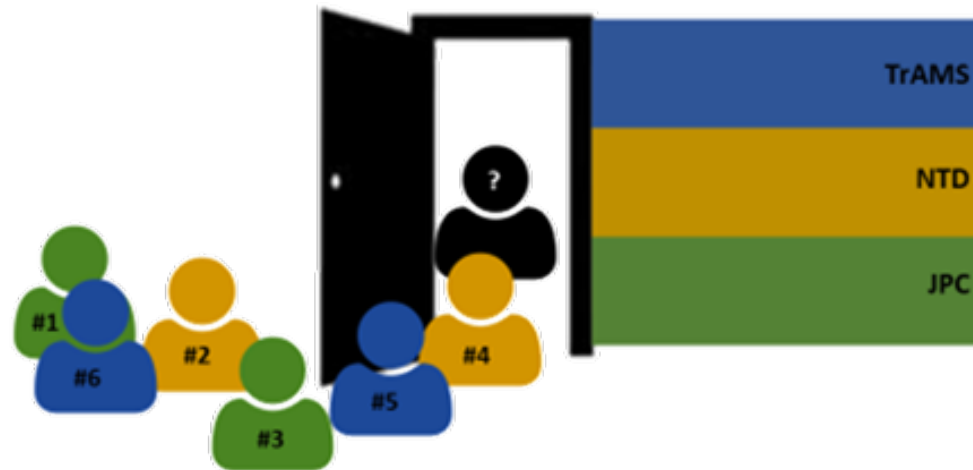
- A list of FTA Local Security Managers (LSM) in each FTA region and headquarters office.
- A handbook for recipient User Managers
- Instructions for how to request a User Manager for your organization.
- Delegation of authority templates for the User Manager and additional TrAMS roles.
- The TrAMS User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

Additional Resources

- Slide deck and recordings for past trainings at <http://www.fta.dot.gov/TrAMS>
- Additional guidance documents and tip sheets on recent changes.
- Contact your FTA regional office for more information on any specific trainings they have planned for FY 18.
- For technical problems, contact the TrAMS help desk at fta.trams.help@dot.gov or 1-877-561-7466
- NTD help desk is NTDHelp@dot.gov or 1-888-252-0936

What is FACES?

- FTA Access Control Entry System (FACES)
 - FACES is the “front door” that you have been walking through to access TrAMS and NTD
 - Your User Record is a part of FACES
 - Provides **user authentication** and **management** across all FTA systems
 - Ensures a consistent experience for all TrAMS and NTD users



FACES Highlights

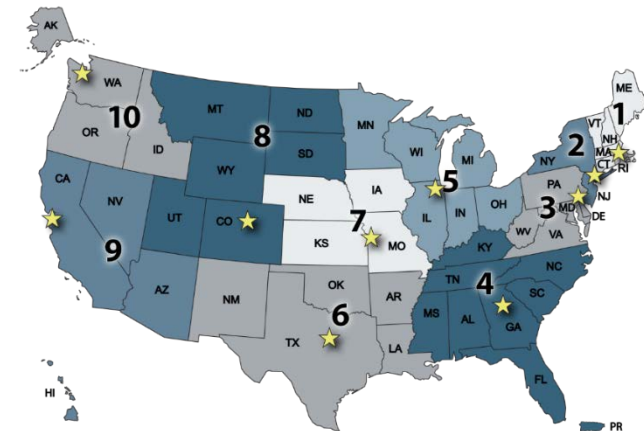
- Most roles and business rules have NOT changed!
- Behind the scenes changes to make the system more robust
- Streamlined, Standardized, and More Flexible User Management
- New Audit trails (know who did what, when, and with what authority)
- Enhanced communication of user changes
- Additional Layers of Security (satisfy DOT policy requirements)
- More self-management options and fewer calls to the Help Desk!

New Terms!

Key Terminology

Overview

User Type	Role Category	TrAMS Roles (examples)	NTD Role (Examples)
FTA	Global Users	GSM Help Desk	GSM FTA Signers/Viewers
	FTA Staff	LSM Pre-Award Mgr.	LSM
	Validation Team		Validation Analyst
Organization	Recipient	User Manager Submitter	
	Reporter		User Manager Editor
External	Contractors	Contractor	Contractor
	Auditors	TrAMS Auditor	NTD Auditor



Cost Center – The 10 FTA Regional Offices and 10 HQ Offices that work with local transit officials in developing and processing grant applications

New User Roles

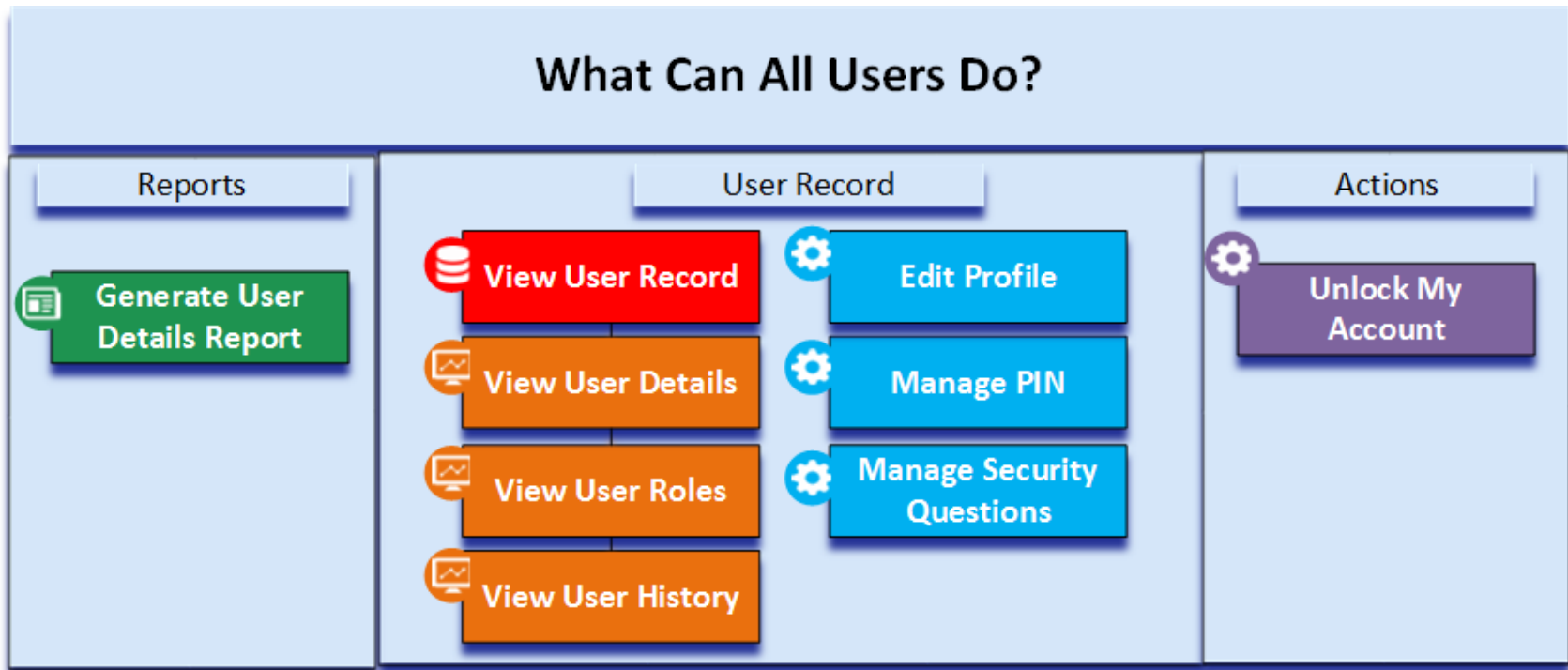
Overview

- FTA Roles**
 - ✓ Global Security Manager (GSM)
Equivalent to having the LSM role in all Cost Centers (aka the "Super LSM")
 - ✓ Global Viewer
Equivalent to have the Read Only role in all Cost Centers
 - ✓ User Manager Supervisor (NTD)
Validation team member – creates Reporter UMs

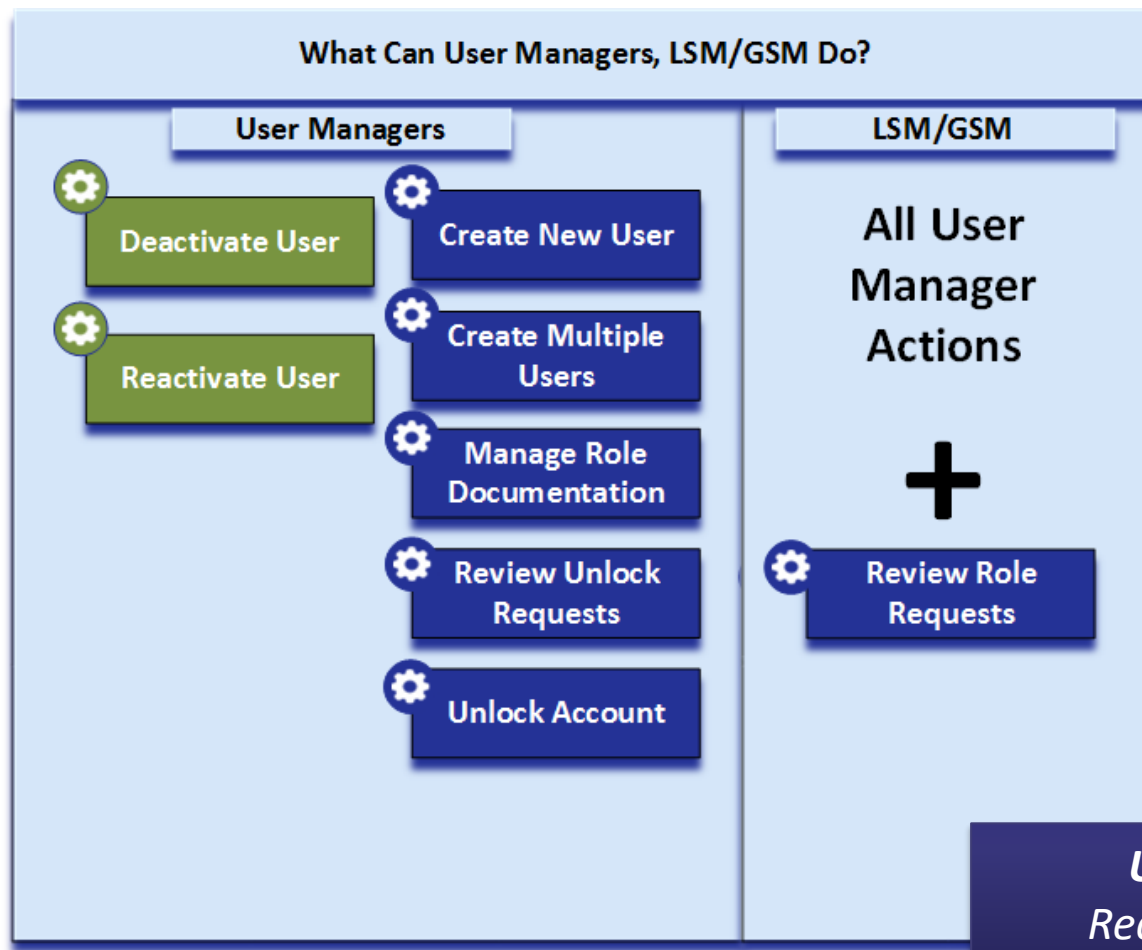
- Recipient Roles**
 - ✓ JPC Procurement Officer (TrAMS)
only available to active FTA recipient organizations

- External Roles**
 - ✓ FTA Contractor
 - ✓ Auditor
 - ✓ DOL User Manager (TrAMS)

FACES Capabilities



FACES Capabilities



Dashboard: User Details

Records / Users

TrAMS, Jane (jane.trams@fake.transit.com)

Summary **User Details** User Roles History News Related Actions

Account Information

User Type Organization	Status Active
Created On 10/16/2017	Last Login Date 10/20/2017
Username jane.trams@fake.transit.com	Title Tester
First Name Jane	Honorific Dr.
Middle Name	Company Name
Last Name TrAMS	System TrAMS


Contact Information

Email acs.uat.1@gmail.com	Fax Number
Phone Number (123) 123-1234	Phone Ext
Address 1 101 Maple St	Zip Code 12345
Address 2	Zip Ext
City Washington	PO Box
State DC	

Key Changes

- ✓ Organizations and Roles moved to a new dashboard
- ✓ New fields: User Type, Status, Last Login Date, Systems

Dashboard: User Roles (New!)

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

Records / Users
TrAMS, Jane (jane.trams@fake.transit.com)

Summary User Details **User Roles** History News Related Actions

Roles

Role	Role Category	System	Cost Center	Organization	Document	Status
JPC Procurement Officer	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved
Official	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	Test Document 2	Requested

User Managers for Jane TrAMS

User's Managers	System	Cost Center	Organization
User Manager DEDOT	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)
User Manager WMATA	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)
Jon A. Strickland	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)

Key Features

- ✓ Users roles & organizations with links to documentation
- ✓ User's managers with links to profile

Dashboard: History (New!)

News
Tasks (22)
Records
Reports
Actions

Role History

Role	Role Category	System	Organization	Status	Comments	Change By	↓	Date
Submitter	Recipient	TrAMS	1740 - Salem Area Mass Transit District (SAMTD)	Approved	approved	david.schneider@dot.gov		11/7/2017
Official	Recipient	TrAMS	1740 - Salem Area Mass Transit District (SAMTD)	Deleted		brian.woodall@cherriots.org		11/5/2017
Submitter	Recipient	TrAMS	1740 - Salem Area Mass Transit District (SAMTD)	Requested		brian.woodall@cherriots.org		11/4/2017
Official	Recipient	TrAMS	1740 - Salem Area Mass Transit District (SAMTD)	Approved		david.schneider@dot.gov		11/3/2017
Attorney	Recipient	TrAMS	1740 - Salem Area Mass Transit District (SAMTD)	Approved		david.schneider@dot.gov		11/3/2017

5 items

Account History

Action Type	Reason	Comments	Change By	↓	Date
Created	N/A	N/A	david.schneider@dot.gov		11/3/2017

Profile History

Type	Old Values	New Values	Change By	↓	Date
User Security	[Question1 :] [Answer1 :] [Question2 :] [Answer2 :] [Question3 :] [Answer3 :] [Security Question Reset Attempt :] [Answer Attempt Date :] [PIN Reset Attempt :] [PIN Attempt Date :]	[Question1 : 17] [Answer1 :] [Question2 : 24] [Answer2 :] [Question3 : 31] [Answer3 :] [Security Question Reset Attempt : 0] [Answer Attempt Date : 11/8/2017 10:22 AM EST] [PIN Reset	Adrienne Cook		11/8/2017
User Address	[Address 1 :] [City :] [State :] [Zip Code :]				11/3/2017

Key Features

- ✓ Visible to user and their managers
- ✓ Shows role and profile changes
- ✓ Shows account changes

Related Actions: Self-Management



Edit Profile

Edit Profile



Manage Security Questions

Set or update account security questions



Manage PIN

Set or update security PIN

Related Action: Edit Profile

- What's the same?**
- ✓ Edit Profile is a related action
 - ✓ Users can self-manage their profile
 - ✓ User cannot edit their email address
 - ✓ User managers can manage their colleague's profiles
 - ✓ No username changes

- What's changed?**
- ✓ A user's managers (UM, LSM, GSM) can edit the user's email address



Related Action: Manage Security Questions

What's the same?

- ✓ Manage Security Questions is a profile related action
- ✓ Users can manage their own security Q&As
- ✓ Users select 3 distinct security questions and input 3 distinct answers



Manage Security Questions

Set or update account security questions

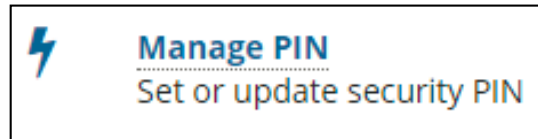
What's changed?

- ✓ Existing security questions must be correctly answered to choose new security Q&As
- ✓ Answers are case insensitive
- ✓ Answers must be at least 3 characters
- ✓ Maximum of 3 failed reset attempts per day
- ✓ Users notified when maximum reset attempts reached
- ✓ Users notified when security questions are successfully reset

**Your existing security
Q&A's will work in new
FACES.**

Related Action: Manage PIN

- What's the same?**
- ✓ Manage PIN is a profile related action
 - ✓ Users can manage their own PINs
 - ✓ PINs are 4-digits (e.g. 1234)
 - ✓ Users can reset their PINs using their existing PINS



- What's changed?**
- ✓ Only users with PIN roles can access the Manage PIN related action
 - ✓ Users can reset their PINs using security questions
 - ✓ Maximum of 3 failed resets per day
 - ✓ Users notified when maximum reset attempts reached
 - ✓ Users and their immediate managers notified when PIN is successfully reset

All PINs will need to be setup in new FACES.

Action: Create New User

What's the same?

- ✓ Usernames must be emails
- ✓ User profile information is collected
- ✓ User roles are added
- ✓ Some roles require justification documents



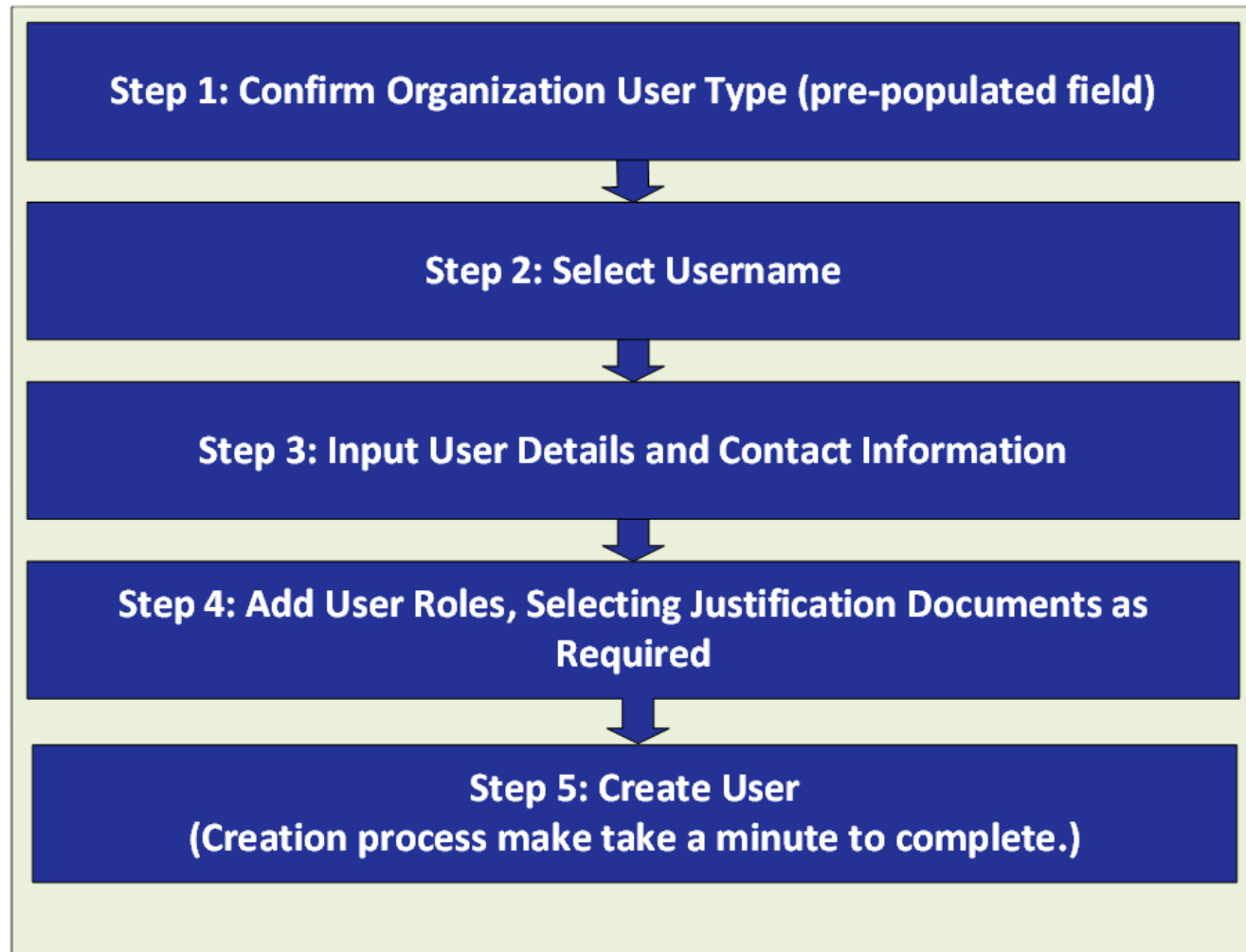
Create New User ☆

Create or Activate a New System User

What's changed?

- ✓ FTA Users have enhanced capabilities

Action: Create New User



Action: Create New User

News Tasks (24) Records Reports **Actions**

Appian

Create User

User Type *

FTA Staff

Organization User (e.g. Recipient, Reporter)

External User

CANCEL NEXT

Step 1:
'Organization
User' User
Type is
prepopulated

Key Changes

- ✓ **Organization UM** - can only create other organization users within their organization
- ✓ **FTA Supervisors** can only activate FTA Users within their cost center
- ✓ **LSM** - can only activate FTA users, create Organization and Contractor Users
- ✓ **GSM** - can activate/create users of any type

Action: Create New User

Step 2:
Input
Username


Create User

Username

The username must be an email address.

Action: Create New User

News
Tasks (24)
Records
Reports
Actions


Appian

Create User

Basic Information

<p>Username * john.trams@fake.transit.com</p> <p>First Name * <input type="text" value="John"/></p> <p>Middle Name <input type="text"/></p> <p>Last Name * <input type="text" value="TrAMS"/></p>	<p>Title * <input type="text" value="Analyst"/></p> <p>Honorific * <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="Mr."/></p> <p>Company Name <input type="text"/></p> <p>Department <input type="text"/></p> <p>System <input type="text"/></p>
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Contact Information

<p>Email * john.trams@fake.transit.com</p> <p>Phone Number * <input type="text" value="(123) 123-1234"/></p>	<p>Fax Number <input type="text"/></p> <p>Phone Ext <input type="text"/></p>
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Step 3:
Input user
details and
contact
information

Action: Create New User

Step 4:
Select user
roles

News
Tasks (24)
Records
Reports
Actions

 Appian

Manage Roles

User Information

Full Name Mr. John TrAMS	Username john.trams@fake.transit.com
Title Analyst	Status No Record
User Type Organization	

ADD
DELETE
DOCUMENTATION

User Roles

<input type="checkbox"/>	Role	↑ Role Category	System	Cost Center	Organization	Document	Status
No Data Available							


Add Role

System <input type="text" value="TrAMS"/>	Cost Center <input type="text" value="78300 - Region 3"/>
Role Category <input type="text" value="Recipient"/>	Organization <input type="text" value="1398 - WMATA (WMATA) ✕"/>

Available Roles & Requirements

<input type="checkbox"/>	Role Name	↑ Approval	Document	PIN
<input type="checkbox"/>	Attorney	Yes	Yes	Yes

Create New User

News Tasks (22) **Records** Reports Actions 

Official Recipient TrAMS 3 (WMATA) 2 Approved

Add Role

System: TrAMS Cost Center: 78300 - Region 3
 Role Category: Recipient Organization: 1398 - WMATA (WMATA) x

Available Roles & Requirements

<input type="checkbox"/>	Role Name	Approval	Document	PIN
<input type="checkbox"/>	Attorney	Yes	Yes	Yes
<input type="checkbox"/>	Civil Rights	No	No	No
<input type="checkbox"/>	Developer	No	No	No
<input type="checkbox"/>	FFR Reporter	No	No	No
<input type="checkbox"/>	Submitter			Yes
<input type="checkbox"/>	User Manager			No

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Key Experience Changes

- ✓ Read-only can no longer be assigned in conjunction with other roles
- ✓ Only one role can be added at a time per "Add" button click
- ✓ Only roles for one org or Cost Center shown at a time

Create New User

The screenshot shows a web application interface for creating a new user. At the top, there are navigation tabs: News, Tasks (22), Records (selected), Reports, and Actions. A user profile icon and the name 'Appian' are visible in the top right corner.

Below the navigation, there is a table listing roles and their associated documents. The table has columns for checkboxes, role names, recipient types, TrAMS systems, document IDs, agency names, document counts, and approval status.

	Role	Recipient	TrAMS	Document ID	Agency	Count	Approval
<input type="checkbox"/>	Officer				(WMATA)	3	
<input type="checkbox"/>	MPR Reporter	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved
<input type="checkbox"/>	Official	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	Test Document 2	Approved

Below the table, there is a section titled 'Add Justification Document'. Underneath, it says 'Available Documents' and provides instructions: 'Select one of the available role justification documents. Additional documents may be uploaded via the 'Manage Role Documentation' button.'

A table lists available documents with columns for checkboxes, document names, descriptions, uploaded dates, and uploaded by users.

<input type="checkbox"/>	Document Name	Description	Uploaded Date	Uploaded By
<input type="checkbox"/>	ACS-85 Justification Document	This is a sample Justification Document uploaded or use with the role.	9/19/2017 4:54 PM EDT	echeng
<input type="checkbox"/>	Sample Upload from new Add Document section	This document is used as a sample only.	9/13/2017 12:06 PM EDT	echeng
<input type="checkbox"/>	ACS-68 User Guide	Test: ACS-68 User Guide	9/11/2017 3:33 PM EDT	rnelvoy
<input type="checkbox"/>	ACS-95 User Guide	Test Document	9/11/2017 8:27 AM EDT	mschmitt
<input type="checkbox"/>	Test Document 2	Test documentation	9/8/2017 3:36 PM EDT	mschmitt

At the bottom left of the interface, there is a button labeled 'UPLOAD NEW DOCUMENT' and a section for 'Role Comments' with a text input field.

Key Experience Changes

- ✓ Documentation uploads/adds completed on same form
- ✓ Can reuse justification documents
- ✓ Comments can be added to each role

Action: Create New User

Step 5:
Click Create

The screenshot shows the 'Manage Roles' page in Appian. The navigation bar includes 'News', 'Tasks (24)', 'Records', 'Reports', and 'Actions' (which is highlighted). A user profile icon and the 'Appian' logo are in the top right. The main content area is titled 'Manage Roles' and contains a 'User Information' section with the following details:


- Full Name:** Mr. John TrAMS
- Title:** Analyst
- User Type:** Organization
- Username:** john.trams@fake.transit.com
- Status:** No Record

Below the user information are three buttons: 'ADD', 'DELETE' (highlighted with a red border), and 'DOCUMENTATION'. Underneath is a 'User Roles' section with a table:

<input type="checkbox"/>	Role	↑ Role Category	System	Cost Center	Organization	Document	Status
<input type="checkbox"/>	Civil Rights	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved

At the bottom of the page, there are three buttons: 'BACK', 'VIEW HISTORY', and 'CREATE' (highlighted in dark blue).


Action: Create New User

News Tasks (24) Records Reports **Actions**  Appian

User Creation In Progress

The user's data is being processed. It may take a few minutes for all changes to appear on the user's record. Click the 'Refresh' button after a minute to confirm that the user has been created. Click the 'Close' button to go back to the Actions tab.

[CLOSE](#) [REFRESH](#)

News Tasks (24) Records Reports **Actions**  Appian

User Successfully Created

Login instructions have been sent to this user via email.

Username john.trams@fake.transit.com	Title Analyst
First Name John	Honorific Mr.
Middle Name	Company Name
Last Name TrAMS	System TrAMS

[Click here to access the user's record.](#)

[CLOSE](#)

Action: Create Multiple Users



Create Multiple Users ☆


Upload Information for Multiple New Users

What's the same? ✓ User data for multiple users can be bulk imported

- What's changed?**
- ✓ Template is now an Excel file (not .cvs)
 - ✓ Additional validations are in place
 - ✓ Error messages are clearer
 - ✓ User records not active until roles are added

Why does this action exist? ✓ This action is useful for adding a suite of new users (e.g. a new Recipient organization)

Action: Create Multiple Users

News Tasks (24) Records Reports **Actions** 

Create Multiple Users

New user information (names, addresses, phone numbers) can be uploaded for multiple users at a time. Once user information is uploaded, new users must be activated using the "Create New User" action on the Actions tab. User roles will be added at that time.


Download Template

Template

Click the link to download the template. Add data for each new user. For "User Type", enter "Organization" for TrAMS Recipient or NTD Reporter users; enter "DOL" for DOL Users; enter "Auditor" for FTA Auditors; enter "Contractor" for FTA Contractors. The template must be saved with an ".xlsx" extension.

[\(+ show instructions\)](#)

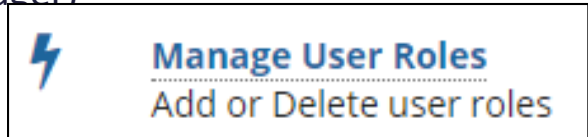
Upload User Data *



Upload your completed ".xlsx" file here.

Related Action: Manage User Roles

- What's the same?**
- ✓ Manage Roles is a profile related action
 - ✓ UMs, Supervisors, LSMs manage colleague's roles
 - ✓ Supporting documentation must be uploaded for elevated roles (e.g. Submitter, Attorney, Official, User Manager)
 - ✓ Role change notifications sent to user



- What's changed?**
- ✓ New look and feel
 - ✓ Concept of "Role Category" introduced
 - ✓ Roles now have statuses (Requested, Approved)
 - ✓ User Manager and JPC roles listed in Recipient role list (no longer added via related actions)
 - ✓ Read-Only and actives roles not allowed in same organization
 - ✓ Users and their account managers are notified of role changes
 - ✓ Role changes result in audit entries on History page
 - ✓ ***No user can manage their own roles***
 - ✓ If all of a user's roles are removed, the user's account will be deactivated

Related Action: Manage User Roles

The screenshot displays the 'Manage Roles' page for a user named Dr. Jane TrAMS. The page includes navigation tabs (News, Tasks (22), Records, Reports, Actions) and a user profile section with fields for Full Name, Username, Title, User Type, and Status. Below this is a table of assigned roles with columns for checkboxes, Role, Role Category, System, Cost Center, Organization, Document, and Status. A callout box at the bottom highlights two key experience changes: a formatting change and the introduction of a role category concept.

Manage Roles

User Information

Full Name Dr. Jane TrAMS Username jane.trams@fake.transit.com
 Title Tester Status Active
 User Type Organization

ADD DELETE DOCUMENTATION

User Roles

<input type="checkbox"/>	Role	Role Category	System	Cost Center	Organization	Document	Status
<input type="checkbox"/>	JPC Procurement Officer	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved
<input type="checkbox"/>	MPR Reporter	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved
<input type="checkbox"/>	Official	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	Test Document 2	Approved

CANCEL VIEW HISTORY SUBMIT

Key Experience Changes

- ✓ Formatting change
- ✓ Concept of role category introduced

Action: Manage Roles Documentation

Manage Role Documentation

System: *Select a System* | Cost Center: 79000 - Region 10 | Organization: *Select an Organization*

ADD DELETE

<input type="checkbox"/>	Document Name	Description	Cost Center	Organization	Uploaded Date	Uploaded By
<input type="checkbox"/>	justification document	description here....	79000 - Region 10	1740 - Salem Area Mass Transit District (SAMTD)	10/31/2017	brian.woodall@cherriots.org
<input type="checkbox"/>	LOGO	LOGO	79000 - Region 10	1740 - Salem Area Mass Transit District (SAMTD)	10/18/2017	brian.woodall@cherriots.org
<input type="checkbox"/>	Map	Map	79000 - Region 10	1740 - Salem Area Mass Transit District (SAMTD)	10/18/2017	brian.woodall@cherriots.org
<input type="checkbox"/>	Role justificatipn	test	79000 - Region 10	1740 - Salem Area Mass Transit District (SAMTD)	10/26/2017	david.schneider@dot.gov
<input type="checkbox"/>	Sample	Sample Doc	79000 - Region 10	1740 - Salem Area Mass Transit District (SAMTD)	10/25/2017	brian.woodall@cherriots.org

< 1 - 5 of 7 >

CLOSE

Key Experience Changes

- ✓ Manage Roles Documentation is an Action
- ✓ Can reuse justification documents

Related Action: Deactivate User

- What's the same?**
- ✓ Deactivate User is a profile related action
 - ✓ UMs, LSMs can access for users within purview
 - ✓ Deactivated users cannot log in to the system

- What's changed?**
- ✓ New look and feel
 - ✓ Form shows roles within management purview
 - ✓ Form shows user's active tasks
 - ✓ Deactivation requires a comment (appears on History page)
 - ✓ UMs, LSMs, GSMs can only deactivate users whose roles are all within authority
 - ✓ All of a user's roles are deleted
 - ✓ Affected users and his/her user managers receive email notification at time of deactivation
 - ✓ Deactivated user records are visible to the user's former UMs, LSMs, GSMs



Related Action: Deactivate User

News
Tasks (22)
Records
Reports
Actions

Deactivate User

User Information

Full Name Ms. Jane TrAMS	Username wmata.mprreporter@fake.com
Title Analyst	Status Active
User Type Organization	

User's Roles In Your Organizations

Role	System	Cost Center	Organization
JPC Procurement Officer	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)
MPR Reporter	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)

User's Tasks In Your Organizations

Tasks

Set Security Q&As

Deactivation

Comments*

This is a sample deactivation.

CANCEL


MANAGE ROLES

DEACTIVATE

Key Experience Changes

- ✓ Form shows user's roles and tasks
- ✓ Comment is required (visible on History)
- ✓ Error if additional roles not in purview
- ✓ Link to Manage Roles

Related Action: Deactivate User (History)

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

Summary User Details User Roles **History** News Related Actions

Role History

Role	Role Category	Cost Center	Status	Comments	Change By	Date
MPR Reporter	Recipient	Region 3	Deleted	Deleted during deactivation.	mpitluck	10/17/2017 1:14 PM EDT
JPC Procurement Officer	Recipient	Region 3	Deleted	Deleted during deactivation.	mpitluck	10/17/2017 1:14 PM EDT
JPC Procurement Officer	Recipient	Region 3	Approved		mpitluck	10/10/2017 12:47 PM EDT
MPR Reporter	Recipient	Region 3	Approved		wmata.usermanager@fake.com	8/21/2017 5:16 PM EDT


Account History

Action Type	Reason	Comments	Change By	Date
Deactivation	Ad Hoc Deactivation	This is a sample deactivation.	mpitluck	10/17/2017 1:13 PM EDT
Created	New User	New User	wmata.usermanager@fake.com	8/20/2017 8:00 PM EDT

Profile History

Type	Old Values	New Values	Change By	Date
------	------------	------------	-----------	------

Related Action: Reactivate User

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

Records > Users

TrAMS, Jane (wmata.mprreporter@fake.com)

Summary User Details User Roles History News **Related Actions**

Reactivate User

User Information

Full Name Ms. Jane TrAMS **Username** wmata.mprreporter@fake.com
Title Analyst **Status** Deactivated
User Type Organization

Deactivation History

Reason	Date	Change By	Comments
Ad Hoc Deactivation	10/17/2017 1:13 PM EDT	mpitluck	This is a sample deactivation.

Reactivation

Comments

Key Experience Changes

- ✓ Form shows deactivation history
- ✓ Optional comment

Related Action: Unlock User (Updated!)



Unlock User

Unlock a User that has submitted an Unlock Request

- | | |
|------------------------------------|--|
| How does it work? | <ul style="list-style-type: none">✓ A locked user submits an unlock request.✓ Once the request is submitted, a new profile related action appears, Unlock User✓ Related action remains visible as long as user is locked (even if request is rejected)✓ Unlocking a user from this related action deletes existing lockout requests |
| Why was this feature added? | <ul style="list-style-type: none">✓ Provide alternate unlock method if unlock request is mistakenly rejected |

Lockout: Locked User's View

The screenshot shows a web application interface with a dark teal header. The header contains navigation tabs: News, Tasks, Records (highlighted with a yellow underline), Reports, and Actions. On the right side of the header is a user profile icon and the name 'Appian'. Below the header, the page title is 'Records / Users' followed by 'TrAMS, Jane (jane.trams@fake.transit.com)'. A secondary navigation bar includes 'Summary', 'User Details' (highlighted with a blue box), 'User Roles', 'History', 'News', and 'Related Actions'. A prominent pink error message box states: 'Your account is locked, you do not have approval to view this screen.'

The screenshot shows the 'Actions' page of the same application. The header is identical to the previous screenshot, but the 'Actions' tab is highlighted with a yellow underline. The main content area is divided into two sections. The left section features the U.S. Department of Transportation Federal Transit Administration logo and the text 'All >' and 'Starred ☆'. The right section contains a yellow lightning bolt icon, the text 'Unlock Account ☆', and a sub-link 'Unlock Account or Submit Unlock Request'.

Action: Unlock My Account (New!)




Unlock Account ☆

Unlock Account or Submit Unlock Request

- How does it work?**
- ✓ Provides to options to unlock account: Security Questions or Submit an Unlock Request
 - ✓ Unlock requests go to immediate user managers
 - ✓ Unlock request comments can be added
 - ✓ Only one request can be sent per lockout
 - ✓ Maximum 3 security question attempts per day
 - ✓ A successful security question attempt will unlock the account and cancel any unlock requests

Action: Unlock My Account

News Tasks Records Reports **Actions**

 Appian

Unlock Account

Please select an available option to unlock account.

Options *

- Send a request to unlock your account
- Answer security questions

Comment

This is a sample request. Please unlock my account.

Action: Review Unlock Requests (New!)



Review Unlock Requests ☆

Approve or Reject Unlock Requests

How does it work?


- ✓ Unlock requests trigger email notifications to the appropriate UMs, LSMs, or GSMs
- ✓ Notification contain link to this action
- ✓ Review can approve or reject the request
- ✓ Approvals unlock the account, rejections only notify the user
- ✓ Users and their managers are notified via email of the decision

Why the changes?

- ✓ UMs, LSMs can see all active requests at once
- ✓ LSMs and GSMs can step in if needed (e.g. when a UM is on vacation)
- ✓ Declutters task list

Action: Review Unlock Requests (New!)

News
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Appian

Review Unlock Request

Click the name of a locked user to view the user's unlock request.


Locked User	Username	Request On	Lock Date	Lock Reason
Jane TrAMS	jane.trams@fake.transit.com	10/17/2017 9:40 PM EDT	10/17/2017 9:29 PM EDT	Inactivity Lock
Rajiv Nelvoy	rnelvoy	8/3/2017 10:09 AM EDT	7/7/2017 9:28 AM EDT	ACS_CostCenter

CLOSE

- Key Features**

 - ✓ Lockout information provided
 - ✓ Click user's name to review the request

Action: Review Unlock Requests (New!)

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Review Unlock Request

You may 'Approve' or 'Reject' the request using the corresponding buttons. The user will be notified of your decision via email.

User Information

Full Name Dr. Jane TrAMS **Username** jane.trams@fake.transit.com
Title Tester **Status** Active (Locked)
User Type Organization

Roles

Role	Role Category	System	Cost Center	Organization	Document	Status
Official	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	Test Document 2	Approved
MPR Reporter	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved
JPC Procurement Officer	Recipient	TrAMS	78300 - Region 3	1398 - WMATA (WMATA)	N/A	Approved

Request Comments

This is a sample request. Please unlock my account.


Reviewer Comments

Key Features

- ✓ User's name and roles are visible
- ✓ Request comments provided
- ✓ Reviewer can enter feedback

Comments entered will be visible on the user's profile in the 'History' dashboard.

Report: User Details Report (New!)



User Details Report
View user login details, roles, and other data.

- How does it work?**

 - ✓ Report contains user account details and roles information
 - ✓ Dynamic form allows users to apply filters
 - ✓ Recipient users can only see users in their organization(s)

Why the changes?

 - ✓ Streamlines reports
 - ✓ Provides better security of information

Report: User Details Report (New!)

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User Details Report

Report Filter Criteria

System

Role Category

Cost Center

Organization Name/ID

Role

Display individual Roles in Grid

User

Name

Status

Active

Locked

Deactivated

CLEAR FILTER(S)

Users

Username	Name (Last, First)	System	Cost Center	Organization	Role	Last Login Date	Status
adrienne.cook@fake.com	Cook, Adrienne (Ms.)	TrAMS TrAMS	TRO-10 TRO-10	1740 - SAMTD 1740 - SAMTD	Attorney Submitter		Active
allan.pollock@cherriots.org	Pollock, Allan (Mr.)	TrAMS TrAMS	TRO-10 TRO-10	1740 - SAMTD 1740 - SAMTD	Official Submitter	10/20/2017 2:41 PM GMT+00:00	Locked
andrea.jayavelu@fake.com	Jayavelu, Andrea (Dr.)	TrAMS	TRO-10	1740 - SAMTD	Read Only	10/25/2017 2:59 PM GMT+00:00	Active
bfetherston@fetherstonedmonds.com	Fetherston Jr, Ben (Mr.)	TrAMS	TRO-10	1740 - SAMTD	Attorney	10/18/2017 2:21 PM GMT+00:00	Active
brian.woodall@cherriots.org	Woodall, Brian (Mr.)	TrAMS	TRO-10	1740 - SAMTD	User Manager	10/20/2017 3:07 PM GMT+00:00	Active

Report: User Details Report (New!)

Generated Excel Report

User Details Report for jane.trams@fake.transit.com at 2017-10-18 00.15.33 EDT.xlsx

Report Overview Tab

System	TriAD Platform - FACES Report
Report Title	User Access Report
Report Date	10/18/2017 12:15 AM EDT
Filters Applied	System: TrAMS Role Category: TrAMS Recipient User Cost Center: 78300 - Region 3 Organization: 1398 - WMATA (WMATA) Role: Civil Rights User: N/A Name: N/A Status: N/A
Report Tabs	Users: This tab contains user account and contact data for users meeting the search criteria. There is one row per user. Roles: This tab contains role data for each user on the Users tab. There is one row for each role currently assigned to a user.


User Tab

Username	Name	Title	User Type	Email	Office Phone	Street Address	City
abel.ayala@dot.gov	Ayala, Abel	Program Management Specialist	FTA	Abel.Ayala@dot.gov	(817) 978-0560	819 Taylor Street Room 8A36	Fort Worth
abhishek.koirala@dot.gov	Koirala, Abhishek (Mr.)	Student Trainee	FTA	abhishek.koirala@dot.gov	206-220-7510	915 Second Avenue, Suite 3142	Seattle
adam.stephenson@dot.gov	Stephenson, Adam	Program Analyst	FTA	adam.stephenson@dot.gov	213-202-3957	650 Capitol Mall, Suite 4-100	Sacramento
alexandria.burns@dot.gov	Burns, Alexandria						
andres.ramirez@dot.gov	Ramirez, Andres						
angelica.salgado@dot.gov	Salgado, Angelica						
ann.dolecki@dot.gov	Dolecki, Ann						
annemarie.resnick@dot.gov	Resnick, AnneMaria (Ms.)						

Roles Tab

Username	Role	Role Category	System	Cost Center
abel.ayala@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 6
abhishek.koirala@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 10
adam.stephenson@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 9
alexandria.burns@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 5
andres.ramirez@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 4
angelica.salgado@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 5
ann.dolecki@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 3
annemarie.resnick@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 3
arianna.valle@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 9
athena.medero@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 5
audrey.bredehoft@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 9
bernardo.bustamante@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 9
betty.jackson@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 3
betty.jackson@dot.gov	Post-Award Manager	FTA Staff	TrAMS	Region 9




System Record Features

 **Systems**
View Software Release Information and FAQs

News Tasks (24) **Records** Reports Actions


Systems

SEARCH

-  **FACES**
FTA Access Control and Entry System
-  **NTD**
National Transit Database
-  **TrAMS**
Transit Award Management System


System Record Features

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Records / Systems

TrAMS



Summary
News
Related Actions

System Details

Name TrAMS	Current Version 1.1.1
Description Transit Award Management System	Release Date Feb 28, 2016

Help Contacts

Description	How To Access
TrAMS Help Desk	1-877-561-7466 (local: 240-471-4462) or by email at FTA.TrAMS.Help@dot.gov
For additional help, reach out to your Regional Grant Manager for Assistance	List of Regional Grant Managers

Releases

System	Version	Description	Release Date ↓
TrAMS	1.1.1	Initial USA Spending	2/28/2016 12:00 AM EST



Federal Transit
Administration
www.fta.dot.gov