

# **TransAM User Guide**

For Federal Transit Administration Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities Programs

Updated and effective as of April 20, 2022



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## ACCOUNT MANAGEMENT

Every Section 5310 subrecipient who receives vehicles needs a TransAM account for asset management. Subrecipients who receive funding for operating, mobility management, or non-vehicle capital projects do not need a TransAM account and will not be provided one.

Each agency will need to identify one staff person to serve in a management role for the TransAM account. DRPT's Human Services Transit Programs Manager can establish TransAM accounts for those agencies that do not have them, and create a user to fill the management role for each account.

Once an agency has an established TransAM account with a manager assigned, the manager is responsible for adding and deleting additional staff.

If any changes to the account are needed, such as changing the address, business name, website, or email address syntax, contact the DRPT Human Services Transit Programs Manager. Beyond these basic account maintenance activities, the subrecipient is solely responsible for account maintenance and vehicle data.

#### **USER MANAGEMENT**

DRPT strongly recommends that each subrecipient have at least two TransAM users. Each user must have a separate account tied to an individual email address. Shared accounts are not permitted.

The staff person assigned the manager role at the subrecipient agency may add, update, and deactivate additional account users. If a new staff person needs to be assigned to the manager role, contact the DRPT Human Services Transit Programs Manager.

To make any changes to TransAM users, log in, click on the person icon at the top right, and then click Users.

To make changes to an existing user, find the user's name on the list and click on their last name to open their profile. At the top left, click on the Actions drop-down menu and choose the appropriate action from the list:

- Update Profile: Change the user's name, email address, title, phone number, time zone, or address.
  - Note: Only business email addresses that follow the account syntax are allowed.
     If the subrecipient agency changes its business emails, contact the DRPT
     Human Services Transit Programs Manager to make this change to the overall
     TransAM account prior to attempting to update a user's profile.
- Update Authorizations: Change the primary and secondary organizations and user role.
  - Agencies may only have access to this option if they manage more than one TransAM account.

- Reset Password: Send an automatic email to the user to allow a password change. The
  user may also initiate this process by following the Forgot Password process on the
  TransAM login screen.
- Deactivate: Immediately deactivates a user. Each time staff turns over, any previous staff should be deactivated.
  - Note: If an agency does not deactivate its users upon turnover and a previous employee logs in and changes data, DRPT will not be able to recover it.

### ADDING A VEHICLE

Every Section 5310 vehicle subrecipient must record all vehicles funded with Section 5310 funding in TransAM. No vehicles purchased with any other funding may be recorded in **TransAM**. This is a state asset management system to be used for the sole purpose of tracking vehicles and other equipment for which DRPT provides oversight. For the Section 5310 program, this includes only those vehicles that are purchased by DRPT and have DRPT listed as the lienholder.

# Agencies have two business days from the date a vehicle is received to record it in TransAM.

Vehicles may be added in one of two ways: manual vehicle addition (recommended for adding one vehicle at a time; can be used for adding multiple vehicles) or bulk vehicle addition (for adding any number of vehicles at one time using an Excel spreadsheet).

#### MANUAL VEHICLE ADDITION

- 1. Once logged into TransAM, click on the bus icon at the top left and then choose Add Asset.
- 2. Under FTA Asset Class, choose Buses (Rubber Tire Vehicles).
  - a. Regardless of the size and type of vehicle received, all Section 5310 vehicles are recorded as Buses (Rubber Tire Vehicles). Do not choose any other option.
- 3. Click Create New Asset.
- **4.** On the asset information screen, complete all required information:
  - a. Organization: The organization name will default to the subrecipient's name. If the subrecipient manages more than one TransAM account, choose the appropriate agency from the drop-down list.
  - b. Service Status: For all new Section 5310 vehicles, the service status should be In Service.
    - i. If a non-new vehicle is taken out of service for repairs or other reasons, it should be listed as Out of Service. A vehicle removed from service to be used as a spare should be listed as Spare.
  - c. Vehicle Identification Number (VIN): The VIN number appearing on the vehicle's VIN plates and titles, as assigned by the manufacturer.
  - d. Asset ID: The agency's identifying number for the vehicle. Do not use symbols in the asset ID.

- e. Class: All Section 5310 vehicles are recorded as Buses (Rubber Tire Vehicles) regardless of size.
- f. Type: Depending on the size of the vehicle, choose the appropriate vehicle type:
  - i. Minibus: 9-passenger raised roof van and 14-, 15-, and 19-passenger body on chassis vehicles with lifts.
  - ii. Minivan: 5-passenger minivan with ramp.
- g. Subtype: Depending on the size of the vehicle, choose the appropriate vehicle type:
  - i. Bus < 30 ft: 14-, 15- and 19-passenger body on chassis vehicles with lifts.
  - ii. Van: 5-passenger minivan with ramp and 9-passenger raised roof van with lift.
- h. Estimated Service Life (ESL) Category: All Section 5310 vehicles choose the Light Duty Small Bus, Cutaways, and Modified Van category regardless of vehicle size.
- i. Cost (Purchase): The final total cost of the vehicle according to the purchase order provided by the state's vendor.
- j. Funding Type: All Section 5310 vehicles are funded by the Enhanced Mobility for Seniors and Individuals with Disabilities (EMSID) program.
- k. Direct Capital Responsibility: All Section 5310 subrecipients have direct capital responsibility and choose Yes.
- I. Percent Capital Responsibility: All Section 5310 subrecipients have 100% capital responsibility for every Section 5310 vehicle.
- m. Ownership Type: All Section 5310 vehicles are granted to a single agency for use. The ownership type is Owned Outright by Private Entity (OOPE).
- n. Purchased New: All Section 5310 vehicles are purchased new.
- o. Purchase Date: Enter the date the vehicle was delivered to the subrecipient agency.
- p. Manufacturer: Refer to the delivery paperwork provided by the vendor with the new vehicle to determine the vehicle manufacturer (Braun, Ford, Driverge, etc.). Do not choose Other. If the manufacturer is not listed, contact the DRPT Human Services Transit Programs Manager for assistance.
- q. Model: The only model option is Other.
- r. Model (Other): Enter the actual vehicle model according to the delivery paperwork.
- s. Year of Manufacture: The year the vehicle was manufactured.
- t. Fuel Type: The type of fuel used to run the vehicle. Do not choose other.
- u. Dual Fuel Type: If Dual Fuel is selected as the Fuel Type, choose the specific Dual Fuel Type from the drop-down list.
- v. Length: Refer to the vehicle manual or conduct a Google search to determine vehicle length. Enter the length in feet.
- w. Length Units: Choose Feet.
- x. Seating Capacity (ambulatory): Enter the vehicle's seated capacity. Do not count wheelchair tie-downs as seats.
- y. Standing Capacity: Enter the standing capacity, if any.
- z. ADA Accessible: All Section 5310 vehicles are ADA accessible.
- aa. In Service Date: Enter the first date on which the vehicle is used to provide transportation services. This date might not correspond with the delivery date.
- bb. Primary Mode: All Section 5310 vehicles are OR Other Vehicles Operated.

- cc. Service Type (Primary Mode): All Section 5310 vehicles are DO Directly Operated. dd. Dedicated Asset: All Section 5310 vehicles are dedicated assets.
- **5.** Click Add Asset & Go to New Record. Verify that all of the information about the vehicle is correct.

#### **BULK VEHICLE ADDITION**

- 1. Once logged into TransAM, click on the bus icon at the top left and then click on Bulk Updates. At the upper left of the Bulk Updates page, click on Create a new Template.
- 2. Under Template Type, choose New Inventory.
- 3. For the FTA Asset Class, choose Buses (Rubber Tire Vehicles).
- 4. Click Create template.
- 5. Download the file (Excel spreadsheet) and open it. Navigate to the Revenue Vehicles tab and enter all information about the vehicle. Refer to the Manual Vehicle Addition section above for instructions about what to enter or choose for each piece of required information.
- 6. Save the file.
- 7. Return to TransAM and click the bus icon at the top left and then click on Bulk Updates. At the upper left, click on Upload a Template.
- 8. Under Spreadsheet Content, choose New Inventory.
- 9. Click Choose File and then locate the completed file that is saved on your computer.
- 10. Click Upload spreadsheet. TransAM will automatically upload all of the information included in the spreadsheet.
- 11. To verify that the information has been uploaded, click on the bus icon at the top left and then click on Revenue Vehicles. Review your asset list for accuracy.

#### **EDITING A VEHICLE**

Whenever a vehicle's information needs to be updated, such as the service status, condition, or mileage, these changes must be recorded in TransAM.

- 1. Once logged into TransAM, click on the bus icon at the top left, hover over Revenue Vehicles, and then choose Buses (Rubber Tire Vehicles) to view your asset list.
- 2. Find the asset to be updated on the list, and click its Asset ID to open the individual vehicle record.
- Use the Actions menu at the upper right of the Revenue Vehicle Profile to Update or Record final disposition.
  - a. Update:
    - i. Condition: Record the current vehicle condition on a 0.0 to 5.0 point scale, with 5.0 being the highest condition rating.
    - Service Status: List the vehicle as being In Service and actively used, Out of Service for repairs or other issues, or Spare for intermittent programmatic use only.
    - iii. Mileage: Record the current vehicle mileage.

- iv. Other items on this list: Subrecipients may choose to record additional information about vehicles using the items in the Update drop-down list. However, DRPT only provides support for Condition, Service Status, and Mileage updates. If your agency chooses to use other features, they could be changed or disabled at any time.
- b. Record final disposition: When a vehicle is being disposed of by sale, scrap, etc., record the disposition in TransAM.
  - Record the date of disposition, disposition type, sales proceeds (if applicable), mileage at disposition, and provide any comments regarding the disposition.
- 4. Use the Edit button in the Profile section of the Revenue Vehicle Profile to edit the vehicle's Identification & Classification, Characteristics, Funding, Procurement & Purchase, Operations, and Registration & Title information.

#### **BULK VEHICLE EDITS**

- 1. Once logged into TransAM, click on the bus icon at the top left and then click on Bulk Updates. At the upper left of the Bulk Updates page, click on Create a new Template.
- 2. Under Template Type, choose Inventory Updates.
- 3. For the FTA Asset Class, choose Buses (Rubber Tire Vehicles).
- Click Create template.
- 5. Download the file (Excel) and open it. Navigate to the Revenue Vehicles tab and enter all information about the vehicle. Refer to the Manual Vehicle Addition section above for instructions about what to enter or choose for each piece of required information.
- 6. Save the file.
- 7. Return to TransAM and click the bus icon at the top left and then click on Bulk Updates. At the upper left, click on Upload a Template.
- 8. Under Spreadsheet Content, choose Inventory Updates.
- 9. Click Choose File to locate the completed file on your computer.
- 10. Click Upload spreadsheet. TransAM will automatically upload all of the information included in the spreadsheet.
- 11. To verify that the information has been uploaded, click on the bus icon at the top left and then click on Revenue Vehicles. Review the Life Cycle Action Date column for the applicable vehicle(s) to ensure the records were updated.

## BIANNUAL MILEAGE, CONDITION, AND SERVICE STATUS REPORTING

Every Section 5310 vehicle subrecipient must provide biannual mileage, condition, and service status updates in TransAM by July 15 and January 15. These updates may be provided by bulk update or manually by following the steps above.

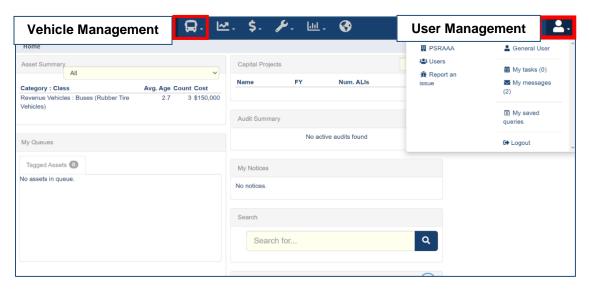
#### PREVENTATIVE MAINTENANCE UPDATES

Subrecipients may choose to update their preventative maintenance records in TransAM, to include oil changes and state inspections. This process may be completed using the bulk

update or manual processes described above. For a bulk update, the template type is Maintenance Updates. Updating maintenance is not a requirement for the Section 5310 program unless specifically stated by your Transit Programs Manager.

#### APPENDIX: TRANSAM USER GUIDE WITH SCREENSHOT INSTRUCTIONS

This section of the user gude provides additional documentation for the above TransAM instructions. This section includes helpful screenshots and additional steps to accomplish the TransAM tasks that are required for Human Service agencies. Once logged in, the user will access the homepage. There, the user can view the main taskbar that has options for all required functions. The below screenshot highlights the two primary functions for Human Service agencies: the user management icon' and the 'edit vehicles icon'.



#### HOW TO UPDATE USER ACCOUNT INFORMATION

This section will focus on user management functions. These tasks include updating user privileges, editing a user's profile, resetting passwords, and deactivating existing accounts.

#### HOW TO CHANGE USER PRIVILEGES: MANAGER

DRPT strongly recommends that each subrecipient have at least two TransAM users. There should be one user who serves as the 'manager' role. The manager is able to add, update, and deactivate additional account users. Users with manager privileges are able to assign roles to new staff and change existing user privileges. If a new user needs to be assigned as the manager then please contact the Human Services Transit Programs Manager. See below steps for updating a user's privileges:



General User

Update General 's profile

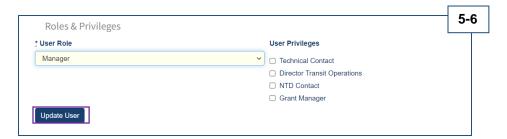
■ Update General 's authorizations

Assign General a task

3-4

Actions -

- 1. The 'manager' can make changes to TransAM users by logging in, accessing the homepage, and clicking on the person icon at the top right.
- 2. A dropdown menu will appear, please click the user's name below the person icon.
- 3. After accessing the 'User Management' Page, click on the 'Actions' settings gear next to the user's name.
- 4. After clicking on "Actions", a dropdown menu will appear. Navigate to "Update User's authorizations".
- 5. Once on the user authorizations page the manager can change the user's role and their privileges.
- 6. Ensure to select "Update User" to save changes before exiting this page.



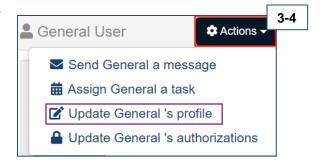
#### HOW TO EDIT USER PROFILE: USERS AND MANAGERS

This section provides detail on how to edit a user's profile. Every user can edit their own profile and managers can edit other user's profiles within their organization.

- 1. Users can make changes to their profile by logging in, accessing the homepage, and clicking on the person icon at the top right.
- 2. A dropdown menu will appear, click the user's name below the person icon.



- After accessing the user management page, click on the 'Actions' settings gear next to the user's name.
- 4. Navigate to 'Update User's profile'.
- Once on the 'Update profile' page a user can update the following: the user's name, email address, title, phone number, time zone, or address.



General User

1-2

Actions

i Assign myself a task

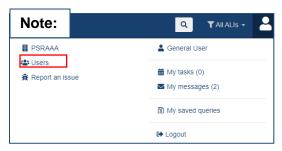
Update my settings

Update my profile

Change my password

Update my profile picture

**Note:** A manager can also update any of their agency's user profiles by accessing 'Users' under the person icon, finding the specific user, and repeating the above steps.



#### HOW TO RESET USER PASSWORD: USERS AND MANAGERS

TransAM allows users to reset their own password. Upon request, TransAM will send an email to the user to allow a password change either at the log-in screen or within the user's profile.

The below steps outline how a user can request a new password when logged in to their account:

- After accessing the user's profile from the TransAM homepage (see previous section), click the "Actions" settings gear next to the user's name.
- A dropdown menu will appear, access 'Change my password' which is the last option on the dropdown menu.
- 3. A new page will appear after clicking 'Change my password', there a user can input their current password and their desired new password.

**Note:** a user can request a new password without logging in by clicking the 'forgot password' option directly below the sign-in box.

#### HOW TO DEACTIVATE USERS: ADMINISTRATORS

A manager can deactivate any of their agency's users. It's important that the manager deletes users that have left the organization immediately. If an agency does not deactivate it's users upon turnover and a previous employee logs in and changes data, DRPT will not be able to recover the lost data. The below steps outline a how to deactivate a user:

1. Access the 'users' page under the person icon on the top right of the home screen.

- 2. On the users table click the specific user you wish to deactivate, once on the specific user's page, click the 'actions' settings gear next to their name.
- 3. A dropdown menu should appear, select "deactivate this user'. If you do not see the option to deactivate the user please send your request to the DRPT Human Services Transit Programs Manager.



#### HOW TO UPDATE VEHICLE INFORMATION

Every Section 5310 vehicle subrecipient must record all vehicles funded with Section 5310 funding in TransAM. No vehicles purchased with any other funding may be recorded in **TransAM**. This is a state asset management system to be used for the sole purpose of tracking vehicles and other equipment for which DRPT provides oversight. For the Section 5310 program, this includes only those vehicles that are purchased by DRPT and have DRPT listed as the lienholder.

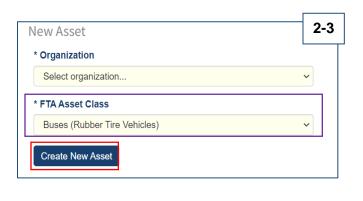
# Agencies have two business days from the date a vehicle is received to record it in TransAM.

Vehicles may be added in one of two ways: 1, manual vehicle addition (recommended for adding one vehicle at a time; can be used for adding multiple vehicles) or 2, bulk vehicle addition (for adding any number of vehicles at one time using an Excel spreadsheet).

# MANUAL VEHICLE ADDITION: RECOMMENDED FOR ADDING ONE VEHICLE AT A TIME

- Once logged into TransAM, click on the bus icon at the top left and then choose Add Asset.
- 2. Under FTA Asset Class, choose Buses (Rubber Tire Vehicles).
  - a. Regardless of the size and type of vehicle received, all Section 5310 vehicles are recorded as Buses (Rubber Tire Vehicles). Do not choose any other option.
- 3. Click Create new Asset.
- 4. On the asset information screen, complete all required information (see next page for a detailed walkthrough of the required fields).







- Organization: The organization name will default to the subrecipient's name. If the subrecipient manages more than one TransAM account, choose the appropriate agency from the drop-down list.
- **2. Service Status:** For all new Section 5310 vehicles, the service status should be In Service.
  - a. If a non-new vehicle is taken out of service for repairs/ other reasons, it should be listed as Out of Service. A vehicle to be used as a spare should be listed as Spare.
- Vehicle Identification Number (VIN): The VIN number appearing on the vehicle's VIN plates and titles, as assigned by the manufacturer.
- **4. Asset ID:** The agency's identifying number for the vehicle. Do not use symbols in the asset ID.
- **5.** Class: All Section 5310 vehicles are recorded as Buses (Rubber Tire Vehicles) regardless of size.
- **6. Type:** Depending on the size of the vehicle, choose the appropriate vehicle type:
  - a. Minibus: 9-passenger raised roof van and 14-, 15-, and 19-passenger body on chassis vehicles with lifts.
  - b. Minivan: 5-passenger minivan with ramp.
- **7. Subtype:** Depending on the size of the vehicle, choose the appropriate vehicle type:
  - a. Bus < 30 ft: 14-, 15- and 19-passenger body on chassis vehicles with lifts.
  - b. Van: 5-passenger minivan with ramp and 9-passenger raised roof van with lift.
- 8. Estimated Service Life (ESL) Category: All Section 5310 vehicles choose the Light Duty Small Bus, Cutaways, and Modified Van category regardless of vehicle size.
- Cost (Purchase): The final total cost of the vehicle according to the purchase order provided by the state's vendor.
- 10. Funding Type: All Section 5310 vehicles are funded by the Enhanced Mobility for Seniors and Individuals with Disabilities program.
- 11. Direct Capital Responsibility: All Section 5310 subrecipients have direct capital responsibility and <u>choose 'Yes'</u>.
- **12. Percent Capital Responsibility**: All Section 5310 subrecipients have 100% capital responsibility for every Section 5310 vehicle.
- **13. Ownership Type:** All Section 5310 vehicles are granted to a single agency for use. The ownership type is Owned Outright by Private Entity (OOPE).
- **14. Purchased New**: All Section 5310 vehicles are purchased new.
- **15. Purchase Date**: Enter the date the vehicle was delivered to the subrecipient agency.



- **16. Manufacturer:** Refer to the delivery paperwork provided by the vendor with the new vehicle to determine the vehicle manufacturer (Braun, Ford, Driverge, etc.). <u>Do not choose "Other"</u>. If the manufacturer is not listed, contact the DRPT Human Services Transit Programs Manager for assistance.
- **17. Model:** The only model option is Other.
- **18. Model (Other):** Enter the actual vehicle model according to the delivery paperwork.
- **19. Year of Manufacture:** The year the vehicle was manufactured.
- **20. Fuel Type:** The type of fuel used to run the vehicle. <u>Do not choose</u> "other".
- **21. Dual Fuel Type:** If Dual Fuel is selected as the Fuel Type, choose the specific Dual Fuel Type from the drop-down list.
- **22. Length:** Refer to the vehicle manual or conduct a Google search to determine vehicle length. Enter the length in feet. Length Units: Choose "Feet".
- **23. Seating Capacity (ambulatory**): Enter the vehicle's seated capacity. Do not count wheelchair tie-downs as seats.
- 24. Standing Capacity: Enter the standing capacity, if any.
- **25. ADA Accessible:** All Section 5310 vehicles are ADA accessible.
- **26. In Service Date:** Enter the first date on which the vehicle is used to provide transportation services. This date might not correspond with the delivery date.
- **27. Primary Mode:** All Section 5310 vehicles are OR Other Vehicles Operated.
- **28. Service Type** (Primary Mode): All Section 5310 vehicles are DO Directly Operated.
- **29. Dedicated Asset:** All Section 5310 vehicles are dedicated assets.
- **30. Click Add Asset & Go to New Record.** Verify that all of the information about the vehicle is correct.

#### BULK VEHICLE UPDATES - FOR ADDING MULTIPLE VEHICLES AT ONE TIME **USING EXCEL 1A**

Revenue Vehicles

Equipment

A Infrastructure

# Facilities

Groups

Q Query

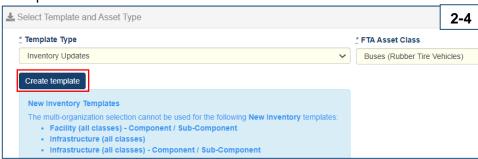
+ Add Asset

Мар

- 1. Once logged into TransAM, click on the bus icon at the top left and then click on Bulk Updates. At the upper left of the Bulk Updates page, click on Create a new Template.
- 2. Under Template Type, choose Inventory Updates.
- 3. For the FTA Asset Class, choose Buses (Rubber Tire Vehicles).
- 4. Click Create template.

5. Download the file (Excel) and open it.

Navigate to the Revenue Vehicles tab and enter all information about the vehicle. Refer to the Manual Vehicle Addition section above for instructions about what to enter or choose



**Bulk Update** 

Mileage

Mileage

Service status

**Bulk Update** 

♣ Create a new Template

for each piece of required information.

- 6. Save the file.
- 7. Return to TransAM and click the bus icon at the top left and then click on Bulk Updates. At the upper left, click on Upload a Template.

♣ Spreadsheet

Spreadsheet Content

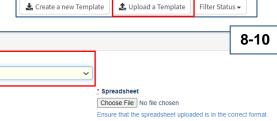
Inventory Updates

Upload spreadsheet

- 8. Under Spreadsheet Content, choose Inventory Updates.
- 9. Click Choose File to locate the completed file on your computer.
- 10. Click Upload

spreadsheet. TransAM will automatically upload all of the information included in the spreadsheet.

11. To verify that the information has been uploaded, click on the bus icon at the top left and then click on Revenue Vehicles. Review the Life Cycle Action Date column for the applicable vehicle(s) to ensure the records were updated.





1B

♣ Upload a Template Filter Status ▼

## BIANNUAL MILEAGE, CONDITION, AND SERVICE STATUS REPORTING

Every Section 5310 vehicle subrecipient must provide biannual mileage, condition, and service status updates in TransAM by July 15 and January 15. These updates may be provided by bulk update or manually.

#### PREVENTATIVE MAINTENANCE UPDATES

Subrecipients may choose to update their preventative maintenance records in TransAM, to include oil changes and state inspections. This process may be completed using the bulk update or manual processes described above. For a bulk update, the template type is Maintenance Updates. Updating maintenance is not a requirement for the Section 5310 program unless specifically stated by your Transit Programs Manager.

