System Tips and Tools: Using NTD 2.0

This guide will provide you with useful tips to help navigate the website. Should you have any further questions, please contact your analyst or the NTD Help Desk at (888) 252-0936 or NTDHelp@dot.gov.

Viewing the NTD System

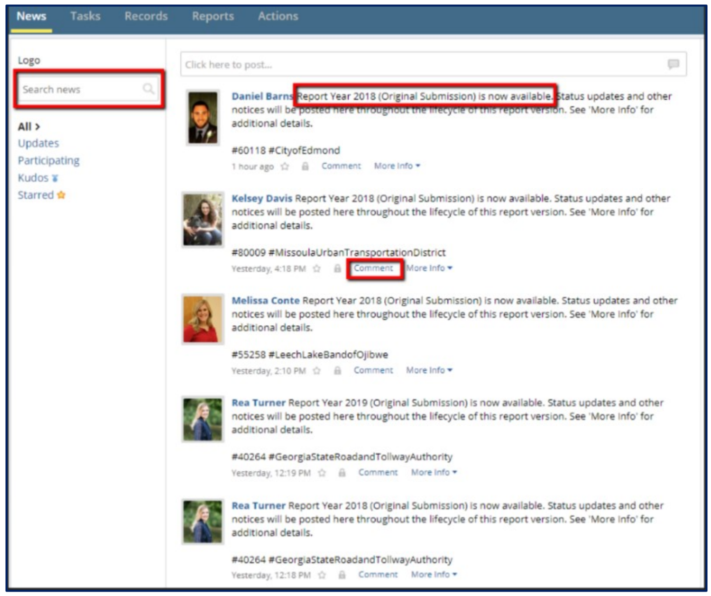
News Feed

The system displays the **Newsfeed** when you log on.

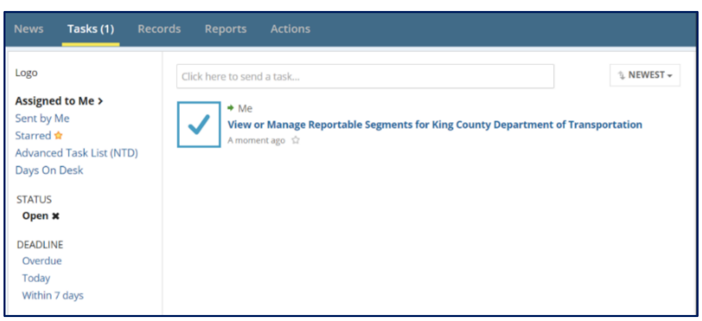
The Newsfeed:

- Shows status information (e.g., revision dates), and;
- Allows users to comment or search for report items.

Note: The system does not notify analysts when you comment on the Newsfeed.



Tasks



Actions that you need to perform (e.g., viewing returned reports, completing the Report Year Kickoff, etc.) display as tasks under the **Tasks** menu.

If you view a form without clicking 'close', the system creates a task.

Note: Incomplete items, such as a partial report submission, appear as a task.

Records

The **Records** menu provides you with access to your transit agency's information, such as its NTD Reporter Profile or NTD Report Packages.

NTD Reporter Profiles contain basic information that does not typically change from year to year (e.g., contact information, user roles, modes of service, and fixed guideway segment details).

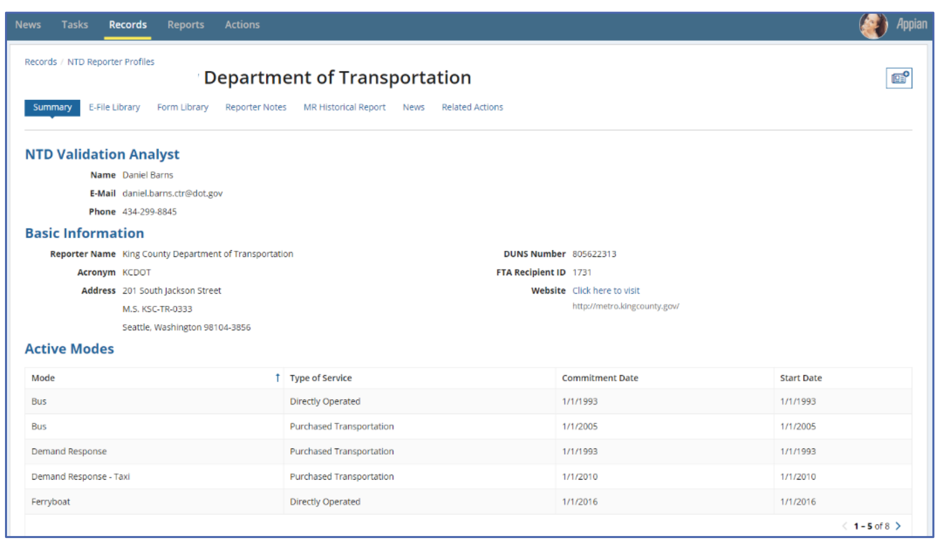
NTD Report Packages houses all annual and monthly reports under the respective fiscal year.

Note: If you are having trouble navigating to editable forms, use the 'Related Actions' button on the left-hand side of the webpage.

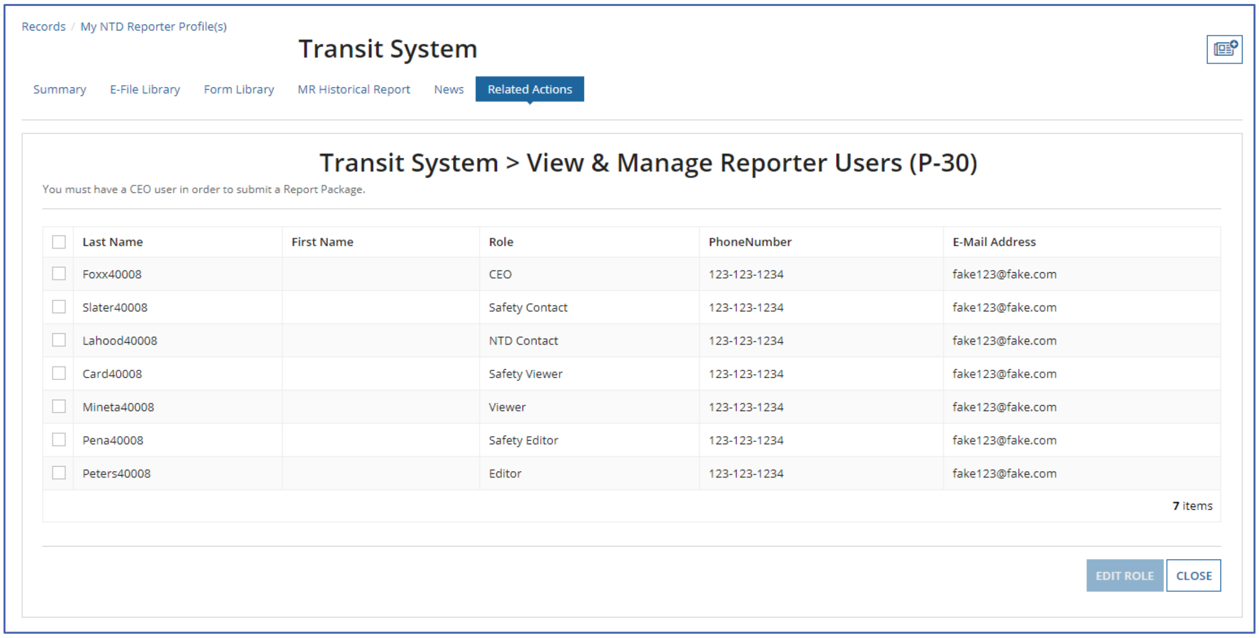
Reporter Profile

The NTD Reporter Profile contains information for your transit agency that does not typically change on an annual basis.

To view and edit your profile forms, click 'Related Actions' from the summary profile page.



Viewing and Editing Agency Contacts



Records / My NTD Reporter Profile(s)

Transit System

Summary E-File Library Form Library MR Historical Report News Related Actions

Transit System > View & Manage Reporter Users (P-30)

You must have a CEO user in order to submit a Report Package.

Last Name	First Name	Role	PhoneNumber	E-Mail Address
Foxx40008		CEO	123-123-1234	fake123@fake.com
Slater40008		Safety Contact	123-123-1234	fake123@fake.com
Lahood40008		NTD Contact	123-123-1234	fake123@fake.com
Card40008		Safety Viewer	123-123-1234	fake123@fake.com
Mineta40008		Viewer	123-123-1234	fake123@fake.com
Pena40008		Safety Editor	123-123-1234	fake123@fake.com
Peters40008		Editor	123-123-1234	fake123@fake.com

7 items

EDIT ROLE CLOSE

You may view your users under the P-30 form.

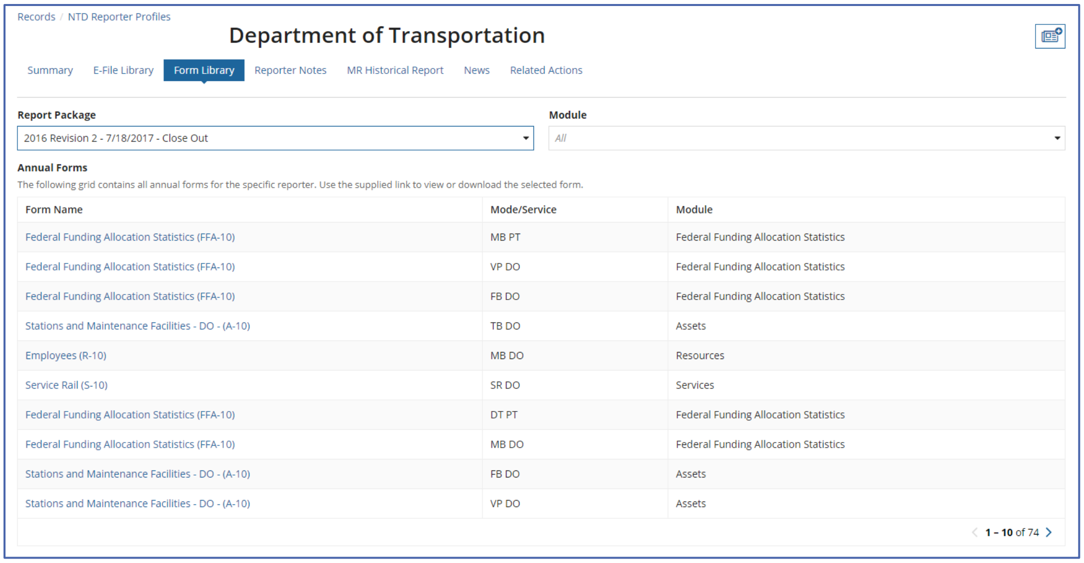
User Managers are the only users that may add new agency contacts to the system via the Actions Tab > Add New User.

User Managers, CEOs, or NTD Contacts may update users' roles—this capability is under Records > Users > User's Name > Related Actions.

Note: If you need to change the User Manager for your transit agency, contact your analyst to set up someone else with these privileges.

Viewing Prior Report Data

You can view prior year data in the Form Library, which is located under **NTD Reporter Profiles.**



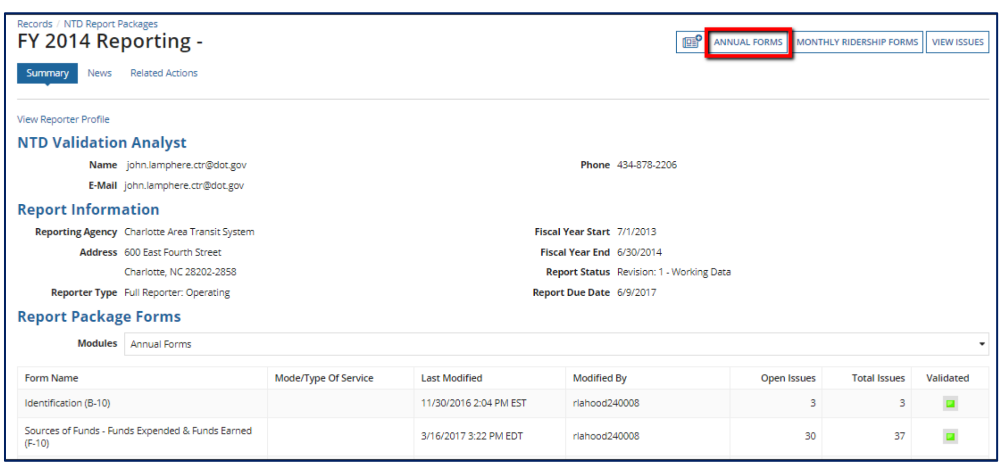
Select the report package version from the drop-down menu at the top of the page. From there, click the form you want to view. The system generates an HTML version of forms filed in Next Gen (i.e., anything after Report Year 2013). Forms from the Legacy system, or NTD 1.0, generate in PDF format.

Note: To view your agency's closeout letter or other agency correspondence use the E-File Library under your **NTD Reporter Profile.**

Data Entry in the NTD System

Report Package

To view annual report forms, click 'Annual Forms' on the right-hand side of the report package landing page, then select the form you wish you view.



In-System Validation

Overview

In the Report Year 2019, FTA will continue the use of the in-system validation feature that allows transit agencies to review and address validation issues within the NTD 2.0 system. By using this internal process to validate data, you can reduce the overall time dedicated to submitting and revising your reports by:

- Reviewing and filtering a comprehensive list of all data validation items prior to completing the Original Submission;
- Preemptively resolving issues by revising incorrect data or missing fields; or
- Proactively providing explanations regarding annual data fluctuations to the NTD analyst, when applicable.

Beginning the Internal Validation Process

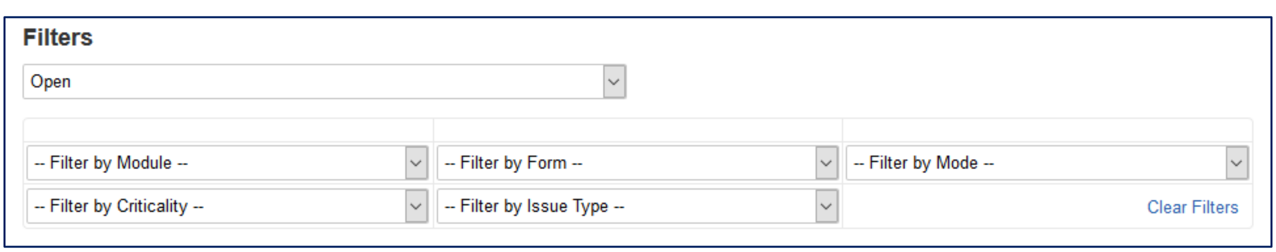
You should continue to enter and save data into the annual report package as you have done in prior report years. At the bottom of each report form, you will see two key features: the “Save and Validate” and “View Issues” buttons.

Save and Validate

If you want to enter partial data into a report form and revisit at a later time, select the “Save” button. When the form is complete and ready for review, the “Save and Validate” button applies the rules of validation to all data entered in the form. Select this option <u>every time</u> you revise or enter new data.

Viewing Issues

After hitting the “Save and Validate” button, select “View Issues.” The resulting page displays all validation issues and allows you to respond accordingly, either by revising the data or providing explanations. After addressing all validation items, you will be able to submit the report for review based on your user role.



You additionally have the option to filter all validation items depending on the Module (asset, financial, etc.), Criticality (important versus critical), Form (any form in the report package), Issue Type (system-generated or manually created by the analyst), or Mode.

To review an issue, you will click on the row with the issue in it once, it will highlight in blue and the validation issues details will appear below it.

Please note that critical issues generally require a change in data to close the issue.

Validation Issue Types

Similar to previous NTD report years, all validation issues can be considered “Open” or “Closed.” However, the internal validation system allows for a more specific subset of issue status types, including “Open with Explanation,” “Open and Escalated,” “Closed with Data Revision,” “Closed with Exception.”

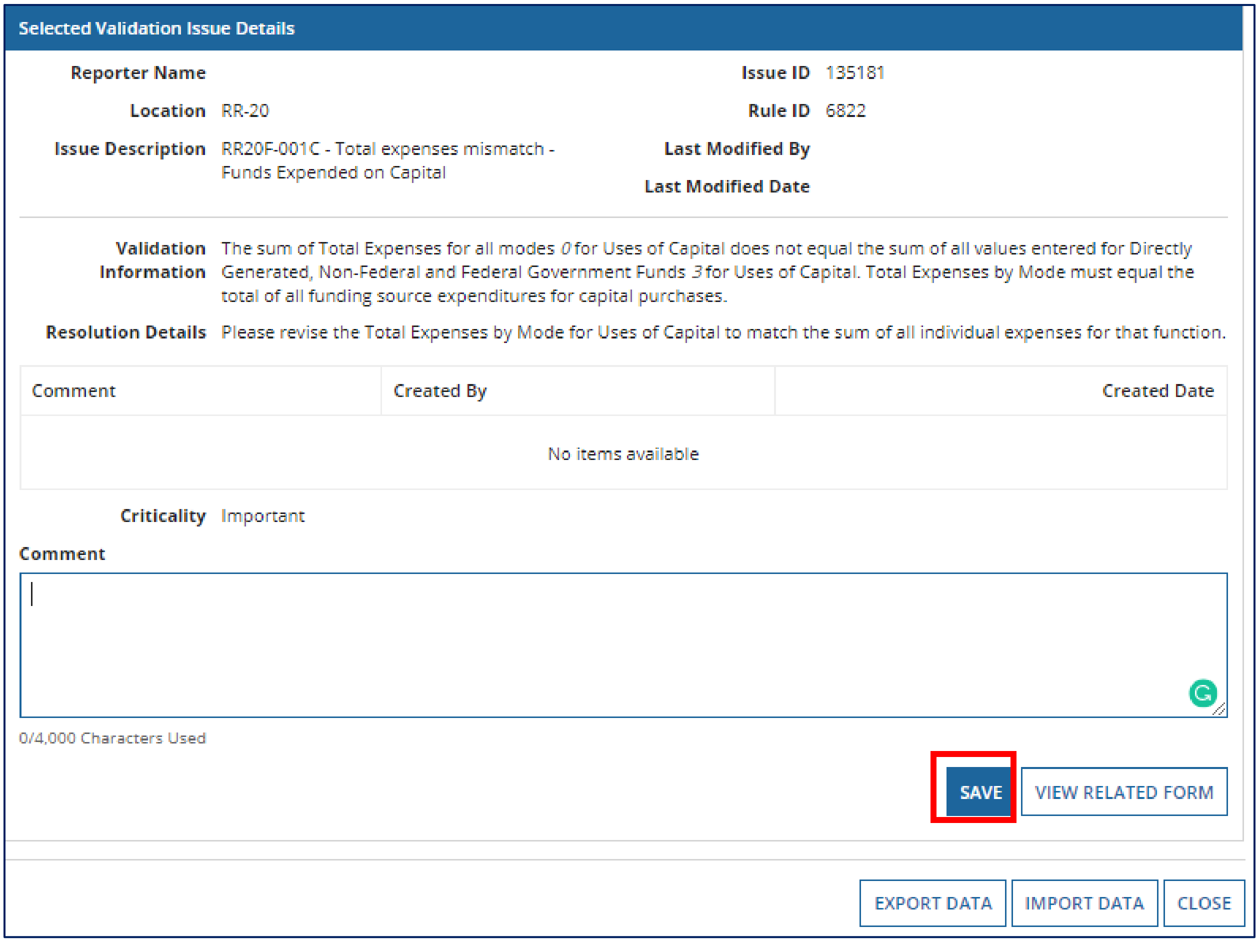
Common Open Issue Types

- Open
    - Validation checks that fire upon saving data are considered “Open.” Any validation checks that the analyst returns for further revision are also considered “Open.” All open validation items must be addressed and resolved before the report year closeout.

Issues

ID	Location	Description	Criticality	Status	Last Modified By	Last Modified Date
135181	RR-20	RR20F-001C - Total expenses mismatch - Funds Expended on Capital	Important	Open		

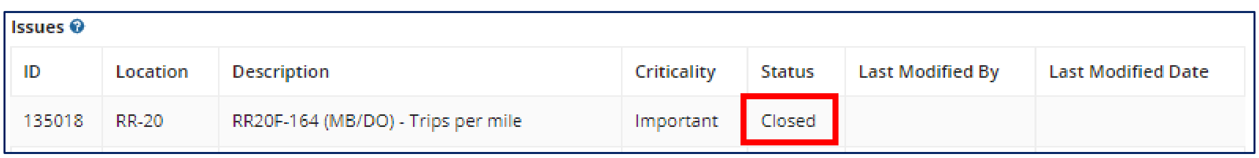
- Open with Explanation
    - Certain validation issues do not require a change in the data itself. You may provide explanations for data that is correct but requires further clarification. Analysts review these comments and close issues accordingly with each report submission. While the explanation is pending analyst approval, the issue is regarded as “Open with Explanation.”



Closed Issue Types

Closed

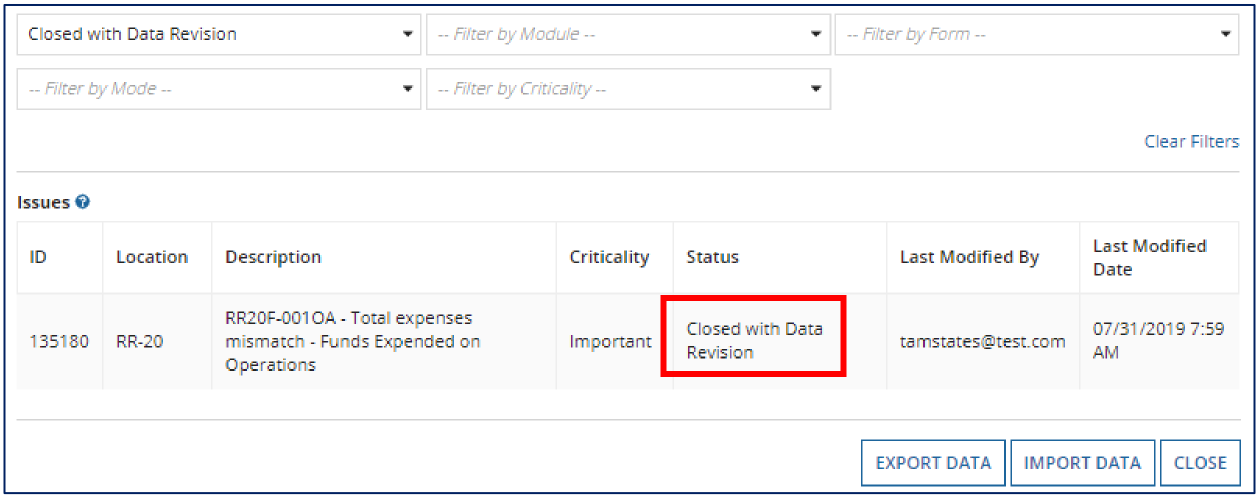
- An issue which the NTD analyst manually accepts, thereby "closes," after reviewing the agency's official response.


Issues

ID	Location	Description	Criticality	Status	Last Modified By	Last Modified Date
135018	RR-20	RR20F-164 (MB/DO) - Trips per mile	Important	Closed		

Closed with Data Revision

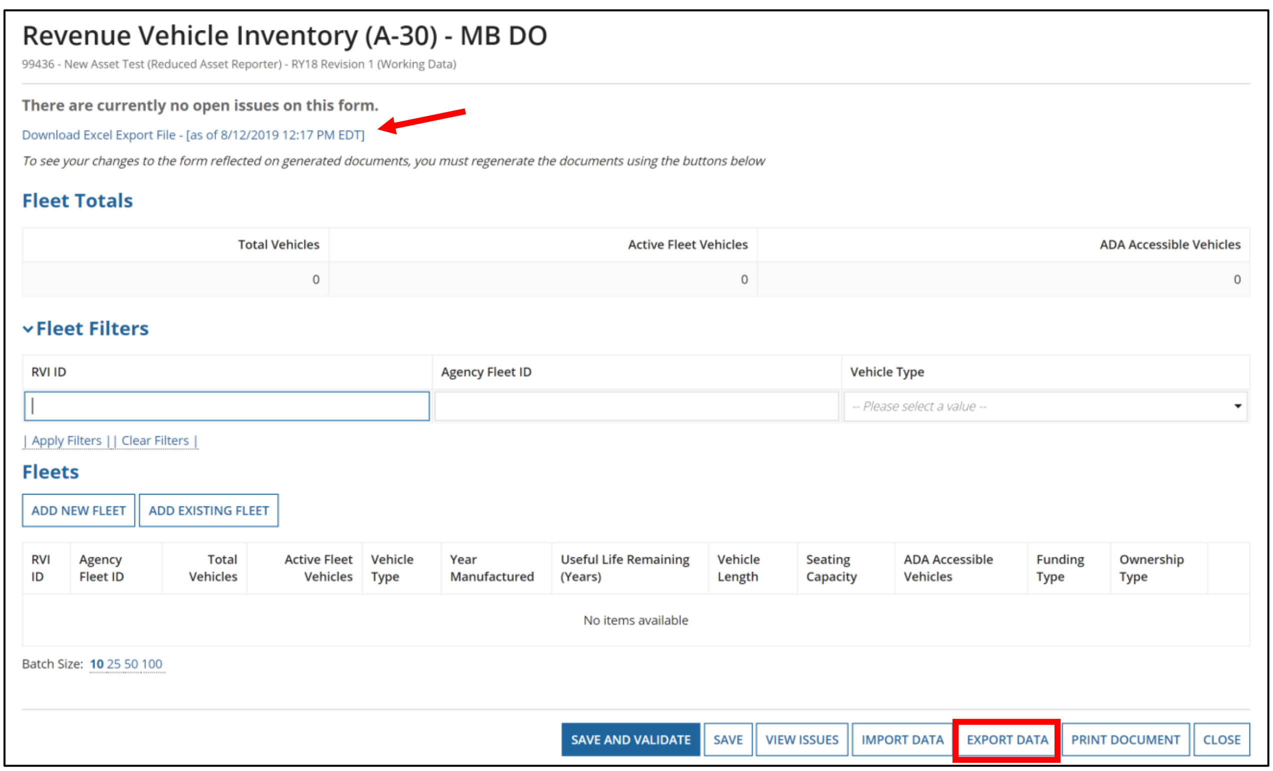
- Some validation checks fire as a result of a data entry error. In these instances, navigate back to the appropriate form and revise the incorrect values. After making this change, reselect the "Save and Validate" button. If the error is correctly addressed, this item would be newly listed as "Closed with Data Revision" on the "View Issues" page. This status is automatically updated and does not require analyst approval.



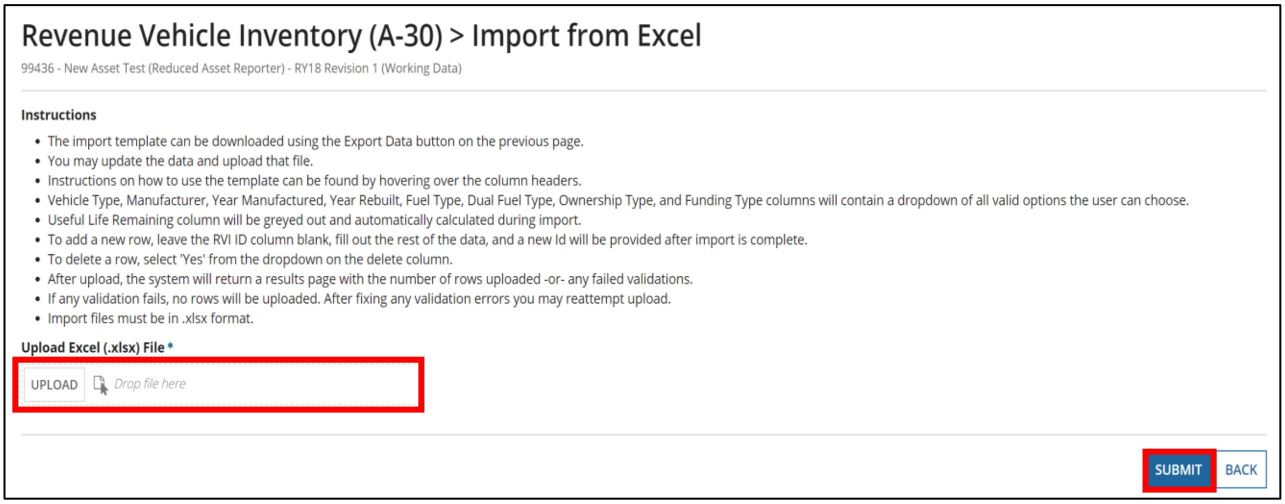
Import and Export Functions

The NTD 2.0 System includes functionality that allows for importing or exporting data for most annual forms in addition to validation issues. These buttons are located near the regular Save and Close buttons at the bottom of each form.

To export data from a form, navigate to an annual report form, scroll to bottom and click “Export Data.” A downloadable excel version of the form will populate. Click on the file to open it and begin entering data into the export template.



Once the sheet is downloaded, begin entering data or editing existing data in the form. The sheet is protected and will not allow tabs to be hidden/deleted/altered. When the form is completed, save the file. Then, navigate back to the form and click “Import Data.”



Click Upload and select the Excel document from your saved files, then click “Submit.” Click the “Refresh” button until the system accepts the file. If there were any errors with the upload, the system will present an error message. Resolve any errors in the document and re-upload the file as applicable. Once accepted, click back and verify that all changes were updated and click on “Save and Validate”.

The import and export functionality can be used to respond to validation. To respond to validation in excel format, navigate to the validation issues dashboard either on the individual form or from the package summary page and follow the same steps as above to export the excel sheet.

Respond to validation issues directly in the excel sheet, save the file, and then use the import data button to add your responses in the reporting system. Be sure to review the validation issues in the system after import to ensure that all issues have been responded to.

Submitting the Annual Report

Submission Blockers

Once the report is complete and ready for submission, the agency would navigate to Records > NTD Report Packages > 2019 Annual Report > Related Actions > Submit Annual Report Package. All outstanding issues will appear on the following page if they were not addressed during initial data entry. The three types of submission blockers are:

Forms not Validated – All forms must be validated prior to submission.

Open Issues – Remaining validation items that are not accompanied by either data revision or an official agency explanation.

Incomplete Required Field Forms – Forms containing blank fields that require a value. If an agency has no data to report in a particular field, such as Reportable Events, you must save the field with zeros rather than null values.

Note: For non-State reporters, saving the CEO Certification (D-10) Form does not submit your report package. Please make sure the Data from Other Forms and Annual Total columns on the FFA-10 Form(s) match before you submit your report.

Unlocking Users

If a user has not logged into the system for 60 days, their account automatically locks. The user will still be able to log into the system, but that user will not see any of the usual options under the different tabs.

To unlock their account, a user can answer security questions or request the agency's User Manager to unlock them.

Answer Security Questions

A user can only unlock themselves by answering security questions if they have set up security questions. To answer security questions, they should click Actions > Answer Security Questions. The system will prompt them to answer the questions previously established, and the user's access to the system will be restored once the correct answers are submitted.

Request Unlock

If a user has not set up the security questions, or they cannot remember the answers to the security questions, they should request an unlock. To do this, the user should click Actions > Request Unlock. The system will ask them to confirm their username (email address), and then they click Submit. The request will appear as a Task for the User Manager(s) established for that agency. The User Manager can click to view the task, and then unlock the user.

Note: If a User Manager is locked out and must submit a request to be unlocked, that request is sent to the agency's other User Manager, or directly to FTA if there is not a second User Manager on the agency's profile.