RAIL ACCESS USER GUIDE

VERSION 2.5

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CONTENTS

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INTRODUCTION

Welcome to the Metro Network Access Planning App (NAPA) user guide.

This guide provides step-by-step instructions for submitting and reviewing work event requests and work group requests within NAPA.

You will see this icon throughout this document. It indicates important information, additional insight, or a tip to improve workflow.

WHAT IS NAPA?

NAPA is the system Metro has adopted to manage all requests for access to the Metro rail network for construction, maintenance, and other activities related to working on rail corridors.

Key features

NAPA offers the following key features to make your daily workflows easier and more effective:

- ✓ One central location for all access requests and associated plans
- ✓ Visibility of all process flows and request statuses
- ✓ Standardization of forms and version control
- ✓ Automated record keeping and log tracking
- ✓ Mobile- and tablet-friendly, with email alert functionality
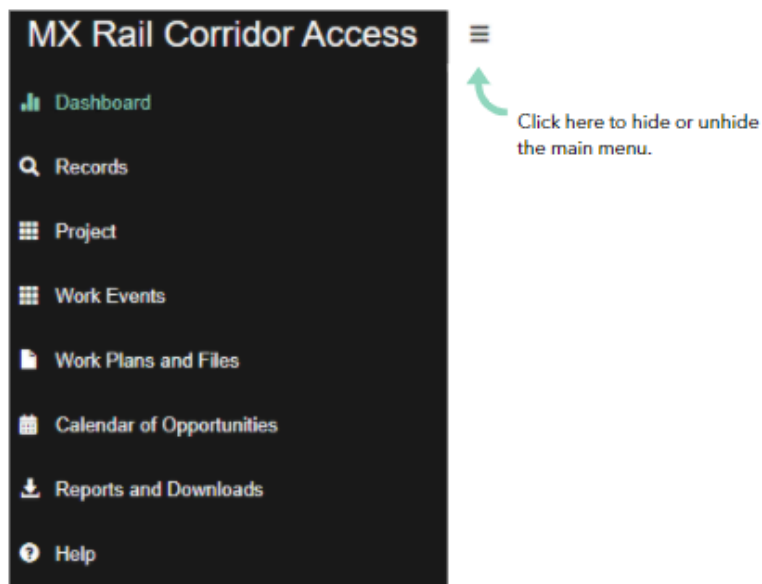
Table 1: NAPA users and tasks

Who uses it…	And why?
Contractors and external third parties	To submit requests for access to rail corridors along with associated work plans and information
Metro Project Delivery Teams (PDTs)	To track contractor access and facilitate accurate and complete requests for access
Metro Rail Corridor Access and Control (RCAC)	To review and approve (or deny) access requests, assign flagging, and ensure the safety of the rail corridors

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NAVIGATING THE TOOL

MAIN MENU

Your main menu is on the left-hand side of the application. Use it to access the screens described below. Certain screens and tasks may not be applicable to all roles.

Figure 1: Main menu

① DASHBOARD
See the status of your work blocks, work block calendar, portfolio budget, and more.

② RECORDS
See current database records and log history related to your projects. Permitted users can approve requests and add metadata.

③ PROJECT
Create, view, or modify project-level information, including key contact information and task numbers.

④ WORK EVENTS
Manage your work event requests, work blocks, and work groups.

⑤ WORK PLANS AND FILES
Upload work plans, contingency plans, and other files associated with a project and work event.

⑥ CALENDAR OF OPPORTUNITIES
See the Rules of the Route - dates, times, locations, and other opportunities for accessing the rail corridor.

⑦ REPORTS AND DOWNLOADS
Download management reports by date, database table reports, or reference documents.

⑧ HELP
Application details and support information.

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USING THE DASHBOARD

The Dashboard page is your default homepage. Use it to get a convenient overview of your:

- Calendar of upcoming work blocks
- Portfolio budget (if applicable)
- Work event reports

Filtering the dashboard

Users can only view their assigned projects. For most NAPA users, this will be a single project.

You can filter your dashboard view using the *Data Filters* section by project (if applicable), major categories of access, start date, corridor, and request status.

As you type in any of the fields, the list will automatically narrow until your selection appears.

Figure 2: Filtering your dashboard by request status

The dashboard will filter all sections to display information relevant only to your selected parameters.

ACCESS REQUEST WORKFLOW

In NAPA, users request access by submitting a *Work Event Booking Request*. Each booking request is associated with a new or existing work event.

- A *work event* is the entire scope of work that includes associated work blocks, work groups, and plans.

- A *work block* defines any work being done for a continuous period. For example, working from 0900 to 1700 on Monday and Tuesday would be two work blocks, while working from Friday 2200 to Monday 0400 would be one work block.

- A *work group* defines separate groups of people and associated machinery working during each individual work block.

- A *work plan* describes the activities and work methods to be executed by the work groups.

    - A *contingency plan* is used for complex work that risks exceeding the approved work block and impacting service.

There can be multiple work blocks, work groups, and work plans associated with one work event. Contractors should group similar work blocks into a single Work Event Request to ensure the entire work event is expediently reviewed and approved.

Figure 3: A single work event can include work blocks, work groups, and work plans.
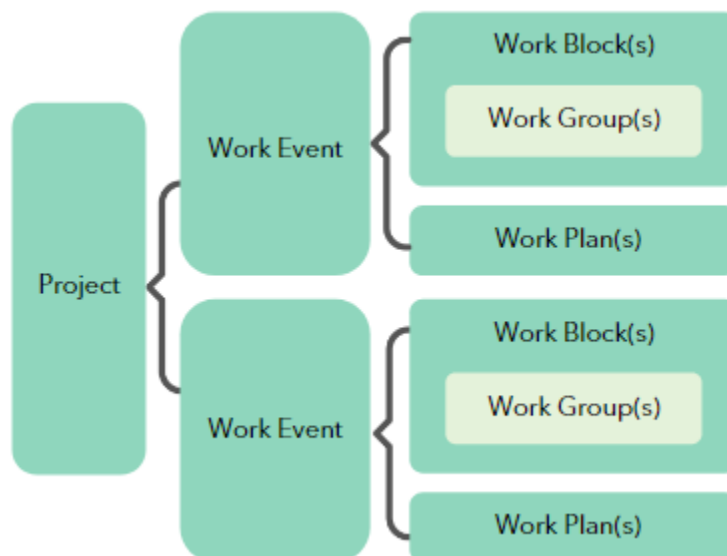
If a contractor wants to perform work on the rail corridor, they need to complete a Work Event Booking Request associated with a specific project to request access and receive approval from Metro.

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The Metro Project Delivery Team (PDT) then reviews the contractor's request.

- If all required information is complete and the request aligns with project goals, the RCAC will review and respond to the request.
- If there is information missing, the PDT follows up with the contractor until the PDT considers the request ready to submit.

If approved, RCAC will assign protection to the work groups as needed.

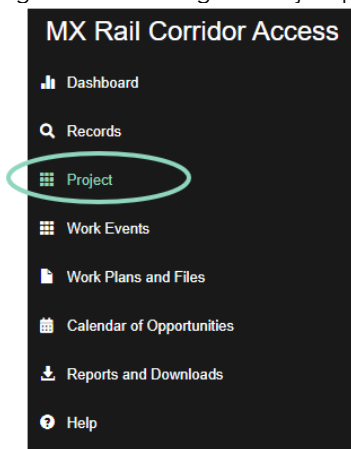The balance of this guide explains how to use NAPA for the tasks associated with this access request workflow.

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PROJECT INFORMATION

All contractors and external third parties are associated with a *project*. Only Metro users can create, modify, or delete project information on the Project page.

Figure 4: Accessing the Project page from the main menu

The Project page includes fields containing contractor contact information.

It is the contractor's responsibility to review this information and ensure these fields are up to date.

If the contractor finds that any fields in the Project page are incorrect or require updating, the contractor must contact the PDT to correct or update the information.

Figure 5: Contractor contact information fields

CREATING WORK EVENT REQUESTS

Before creating a new work event, do a quick check:

✓ Have there been any changes, or do there need to be any changes, to the Contractor Contact Information on the Project page? If so, update the information first.

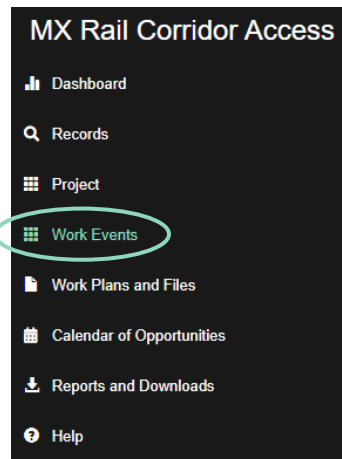### STEP 1: CREATING A WORK EVENT BOOKING REQUEST

To create a new work event, you must first submit a work event booking request to Metro. This work event booking request will apply to all work blocks and work groups in the work event.

The work event booking request gives Metro an understanding of the type of work you are proposing and any associated risks or special requirements. Consequently, once you have submitted the request, you cannot change it (although you can edit associated work blocks and work groups).

To submit a work event booking request:

1. From the main menu, click **Work Events**.

Figure 6: Accessing the Work Events page from the main menu

2. Under *Step 1: Work Event Booking Request*, select the associated project from the dropdown list.

3. Select **New** to create a new work event.

4. Name your work event in a way that summarizes the work in a few words (for example, Light Platform Repair).

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5. Enter a value in *Estimated Access Cost*. This cost applies to the entire work event.

Many fields have a (?) icon that you can click for more information about how to complete the field.

For example, if you click the (?) icon in the *Estimated Access Cost* field, it provides a link to Access Prices to help you estimate cost.

6. Indicate the appropriate *Category of Access, Subcategory of Access*, *Corridors*, *Subdivisions*, and *Start Date* related to this event.

   – For more information about existing scheduled closures and blackout dates, click **Go to Calendar**.

   – Once you have reviewed the calendar, click **Work Events** to return to your work event booking request.

7. Answer **Yes** or **No** to each risk assessment question and complete any free text fields that may apply.

   – If you answer yes to any of the questions, an alert in red will appear stating, "NOTE: A Contingency Plan IS required for this work event." You will have the opportunity to assign a contingency plan once you have submitted the request.

8. Click **Submit Work Event Booking Request**. A Work Event Record is created and the *Step 1: Work Event Booking Request* section will update to select your new work event as an existing event.

If the need for a contingency plan is indicated, it's helpful (although not required) to add it to the project before moving on to Step 2: Adding Work Blocks and Work Groups.

See Uploading work plans and files for more information.

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STEP 2: ADDING WORK BLOCKS AND WORK GROUPS

Once you have submitted your work event booking request, you can add your work blocks and work groups.

Adding work blocks

To add a work block:

1. From the **Work Events** page, select your project and existing work event. (If you just submitted your work event booking request, this happens automatically.)

2. Under *Step 2: Work Blocks and Work Groups*, click **New**.

Figure 7: Creating a new work block
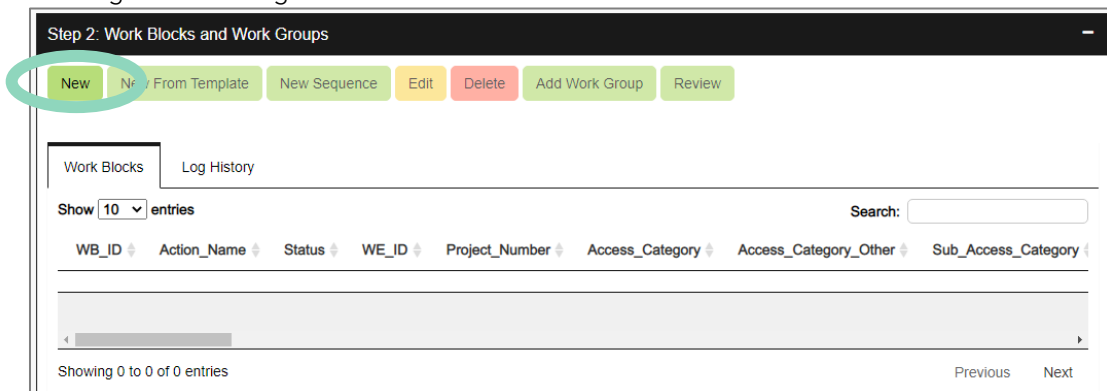
3. Complete all required information in the *New Work Block* window.

   – For *Step 1: Work Block Information*, you must provide basic information about the proposed work (for example, site mileage, access gates, start/end time, etc.).

     o Populate *Work Block Name* with the activity title in the Construction Schedule.

     o The Task Number will automatically pull the task number from the Construction Schedule.

     o A single work block must be continuous. (For example, to work from 2300 – 0200 on Monday and Tuesday, you need two work blocks.) If more than one work block is needed, you will have the option to replicate the work block after saving.

   – For *Step 2: Track Segments*, the checkmarks indicate the sections of track that will be out of service or not passable during this work block. This section automatically populates based on your site start mile and site end mile indicated in the *Work Block Information* section, but you can check or uncheck the segments as appropriate.

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- *Step 3: Contingency Plan* will indicate if you need a contingency plan.

  o If you do not need a contingency plan, click **Save**.

  o If you need a contingency plan and you have already added it to the project, select it from the dropdown list and click **Save**.

  o If you need a contingency plan but you haven't added it to the project yet, click **Save**. Once you have uploaded the plan (see Uploading work plans and files for more information), you can edit this work block and assign it.

Replicating work blocks

Once you have created your work block, you can also replicate it as many times as you need to. This is especially convenient for work events spanning multiple days where you have planned similar or identical work.

To replicate a work block:

1. Click on the work block so it's highlighted.

2. Click **New Sequence**.

3. Enter the number of days you want to repeat the Work Block.

4. Click **Save**.

Creating new work blocks from existing work blocks

You can also pull up existing instances of work blocks within the same work event and use them as templates to create new work blocks.

To do so, highlight the work block and click **New From Template**.

Figure 8: Multiple actions become clickable when you highlight a work block
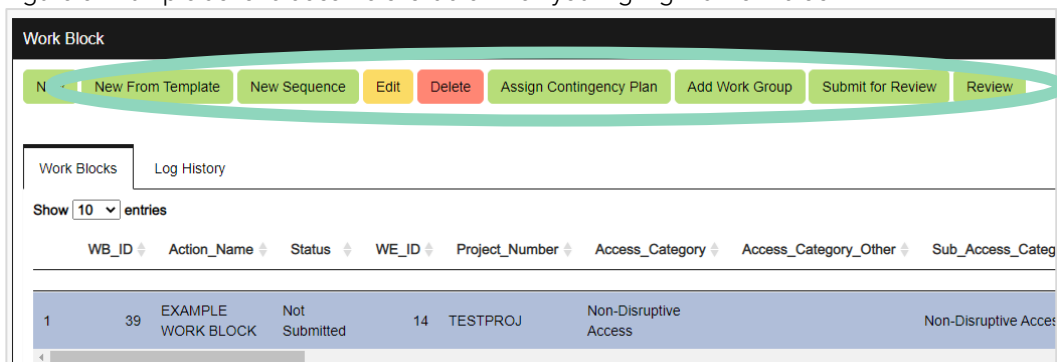
Once you have created a work block, you need to add a work group and any required plans before you can submit your application for access.

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Adding work groups

To add a work group to a work block or to multiple work blocks:

1. Click all work blocks to which you want to assign the same work group so that they are all highlighted at once.

2. Click **Add Work Group**.

Figure 9: Adding a work group to a highlighted work block
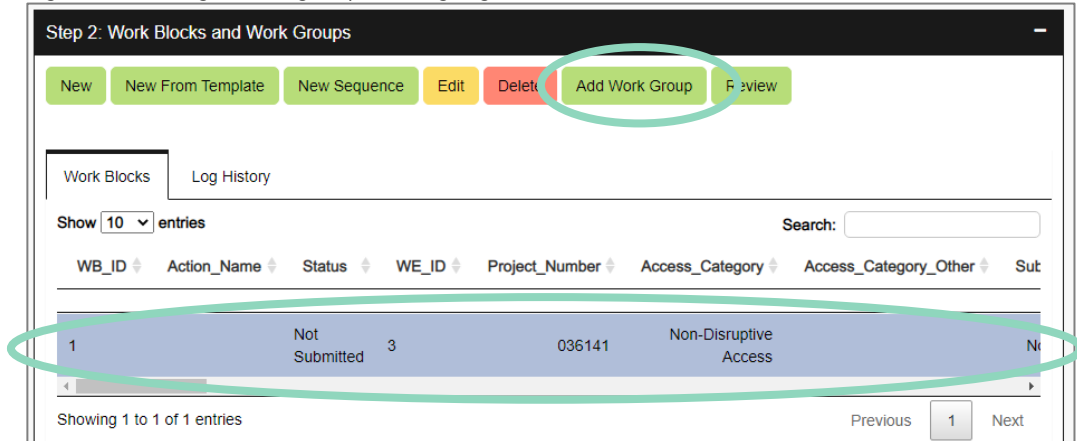
3. Complete all required information in the *Work Group Information* section.

   – If you plan to manage flagging yourself, click **Yes** in the *Self Flagging?* Field and select your contractor from a dropdown list in the *Flagging Contractor* field.

   – If you don't plan on managing flagging yourself, click **No** in the *Self Flagging?* field and indicate your proposed number of flagmen.

4. Any work plans associated with the project will appear in the *Available Work Plans* section.

   – If you have already added the appropriate work plan to the project, select it from the **Assigned Work Plan** dropdown list and click **Save**.

   – If you need a work plan but you haven't added it to the project yet, click **Save**. Once you have uploaded the plan (see Uploading work plans and files), you can edit this work group and assign it.

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As you add work groups to work blocks, they will appear further down the page in the *Work Groups* section. From *Work Groups*, you can edit and delete work groups.

Figure 10: Selecting a Work Group

STEP 3: SUBMITTING YOUR APPLICATION FOR ACCESS

Once you have submitted your work event booking request and added all relevant work blocks, work groups, and supporting documentation, you can submit your application for access. To do so:

1. Go to the **Work Events** tab and select your project and work event (if it's not already open).

2. Scroll down to *Step 3: Submit Application for Access*, and click **Submit Application for Access**.

Monitoring status of requests

Once you have submitted a request, the status will change to "Submitted". Following review, Metro will update the status to one of the following:

- In review
- Approved
- Conflicted
- Rejected
- Cancelled

The Work Blocks section on your dashboard is an easy way to see the status of all your work blocks.

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MODIFYING WORK BLOCKS AND WORK GROUPS

You can modify your saved work blocks and work groups as needed (for example, to assign a contingency plan, change dates, etc.).

To modify saved work blocks or work groups:

1. From the main menu, click **Work Events**.

2. Under *Step 1: Work Event Booking Request*, select the associated project and select **Existing** work event, then select the work event.

3. Scroll down to *Step 2: Work Blocks and Work Groups*.

4. Select either the work block or work group you want to modify and click **Edit**.

5. Make any necessary changes. In the section *Save Action*, select the appropriate reason for change from the dropdown list. If your reason isn't listed, select **Other** and enter it into the freeform text field that appears.
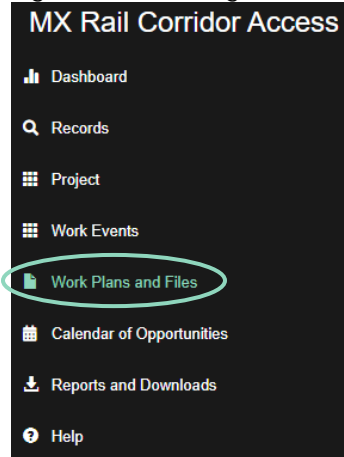
6. Click **Save**.

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UPLOADING WORK PLANS AND FILES

To upload a new work plan, contingency plan, or any other file associated with a project:
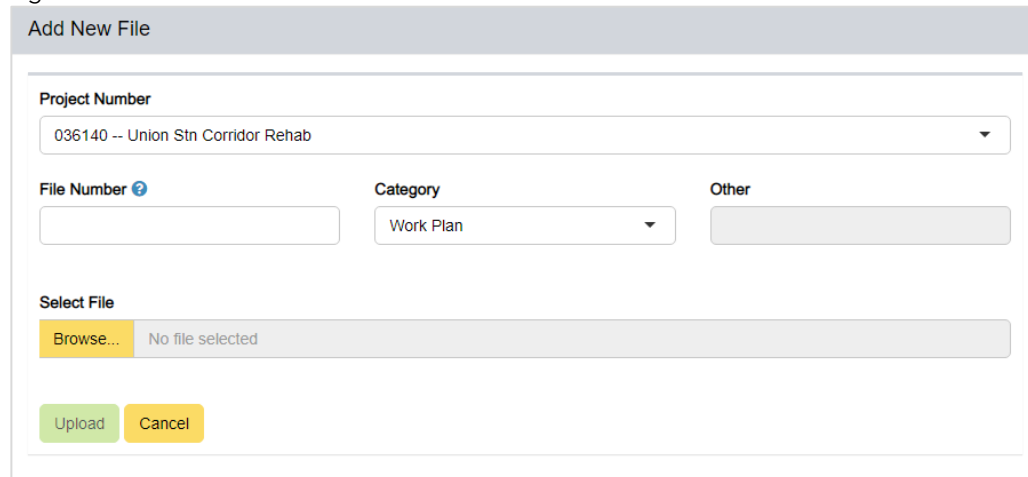
1. From the main menu, click **Work Plans and Files**. (All existing work plans associated with your projects will display in a list.)

Figure 11: Accessing the Work Plans and Files page from the main menu

2. Click **Add New File**.

Figure 12: Add New File window

3. Populate the *Project Number* and *Category* fields.

   – *File Number* is an optional field that you can use if you want to tag the file with a specific reference code or number (for example, workplan number).

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–   If you select **Other** in the *Category* field, the *Other* field will unlock. Populate it with a brief file description (for example, "reference document").

4. Click **Browse** and navigate to your file.

5. Click **Open**.

6. When the upload is complete, click **Upload**.

Different files can have the same name when you upload them, because NAPA assigns a unique File ID to each uploaded file.

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APPENDIX A – FOR METRO USERS ONLY

This section relates to NAPA functionality that is only applicable to Metro users, and should be deleted when sharing this manual with contractors or external third parties.

The following tasks are included in this section:

- Analyzing work event requests
- Updating work event request status
- Assigning protection to a work group
- Creating projects
- Modifying projects
- Downloading reports
- Managing users and user permissions

ANALYZING WORK EVENT REQUESTS

Project Delivery Teams must be able to review newly submitted work event requests by date and by corridor, most commonly on a week-by-week basis. NAPA makes it easy to extract and analyze work event requests in Excel.

Extracting work event tables

To extract submitted work event requests into Excel:

1. From the main menu, click **Dashboard**.

2. Under *Data Filters*, select:

   - Date range: Typically one week, Monday to Sunday
   - Corridor(s)
   - Status: **Submitted**

Figure 13: Filtering by week, corridor, and status

3. Scroll down to *Work Event Report (Non-USRC Work Blocks)*

4. Click **Download Work Event Table (Excel).**

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Figure 14: Downloading work event tables to Excel

You can now analyze your selected data using the downloaded extract.

Working with work event tables and NAPA

As you review your spreadsheet, focus on the following columns. Look for conflicts between events and negative operational impacts.

- Subdivision
- Controlled location
- Date and time
- Tracks
- Activity
- Operational Impact

The colour columns (White, Yellow, and Red) also serve as an excellent mechanism to gauge impact.

- White: No impact on revenue (tracks not closed)
- Yellow: Some revenue impact (tracks closed during off-peak hours)
- Red: High revenue impact (tracks closed during peak hours)

When you're working with work event tables in Excel, it helps to have dual monitors so you can make your changes in NAPA as you go!

As you analyze the data in Excel, you can make your changes live in NAPA.

- To make changes to the submitted requests, highlight the work block under *Work Event Report* and click **Edit Work Block**. Don't forget to indicate the reason for change when you save your edits.
- To edit RCAC fields, highlight the work block under *Work Event Report* and click **RCAC**.

- To change the status of a work event request (from Submitted to Approved, Conflicted, Rejected, etc.), highlight the work block under *Work Event Report* and click **Review Work Block**.

UPDATING WORK EVENT REQUEST STATUS

Although you can do this directly from the dashboard per the previous section, there is another way to update the status of a work event request:

1. From the main menu, click **Work Events**.

2. Under *Step 1: Work Event Booking Request*, select the associated project and existing work event.

3. Scroll down to *Step 2: Work Blocks and Work Groups*.

4. Using the filters below the column names, find and click the work block(s) you want to update.

5. Click **Review**.

6. Select the appropriate status from the dropdown box, add comments if needed, and click **Submit**.

The Work Blocks section on your dashboard is an easy way to see the status of all your work blocks.

ASSIGNING PROTECTION TO A WORK GROUP

To assign protection to a work group:

1. From the main menu, click **Work Events**.

2. Under *Step 1: Work Event Booking Request*, select the associated project and existing work event.

3. Scroll down to *Step 2: Work Blocks and Work Groups*.

4. Using the filters below the column names, find and click the appropriate work group(s).

5. Click **Assign Protection**.

6. Complete the fields in the *Protection Information* window, add comments if needed, and click **Save**.

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CREATING PROJECTS

To create a new project:

1. From the main menu, click **Project**.

2. Under *Step 1: New or Existing Project*, select **New** from the dropdown list.

3. Complete all required information in *Step 2: Enter or Update Project and Contact Information*, then click **Create New Project**.

Before you can create a new project in NAPA, you must have a project number from the Metro Oracle Database.

Adding task numbers to projects

Task numbers are used to bill work events against specific budgets and contracts. Once your project is created, you can assign task numbers to the project from the same page.

To add a task number to a project:

1. Under *Step 3: Enter or Update Task Numbers Associated with the Project*, click **Add Task Number to Project**.

2. In the *Search* field, start typing the task number. As you type, the list will automatically narrow until your task number appears.

Figure 15: Searching for a task number

3. Click the task and click **Add Selected Task Number to Project**.

4. If your task number is not in the system, click **Create New Task Number and Add to Project**. Complete all required information, then submit.

5. Repeat until all task numbers have been added.

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MODIFYING PROJECTS

To modify an existing project:

1. From the main menu, click **Project**.

2. Under *Step 1: New or Existing Project*, select **Existing** and find your project in the dropdown list.

3. Update any fields necessary in *Step 2: Enter or Update Project and Contact Information*.

4. Click **Update Project Information**.

DOWNLOADING REPORTS

From the main menu, click **Reports and Downloads** to access multiple reports you can download to Excel.

Click on any of the report names to automatically download to your computer.

Available reports include:

Table 2: Current downloadable reports

Report name	Customizable by date range	Full database table export
Work Event Requests	x	
Weekly Access Report	x	
Flagging Report	x	
Work Blocks		x
Work Blocks Log		x
Work Groups		x
Work Groups Log		x
Work Event Non-USRC Track Sections		x
Work Event Non-USRC Track Section Log		x
Work Event USRC Track Sections		x
Work Event USRC Track Section Log		x
NAPA Activity Report	x	

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MANAGING USERS AND USER PERMISSIONS

From the main menu, certain Metro users will have one extra option: *Admin*.
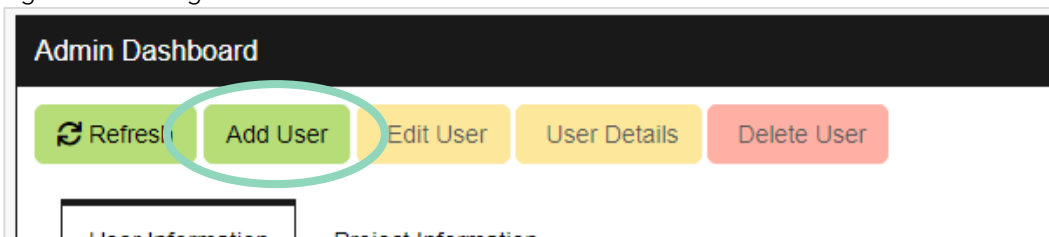
Figure 16: Accessing the Admin page from the main menu
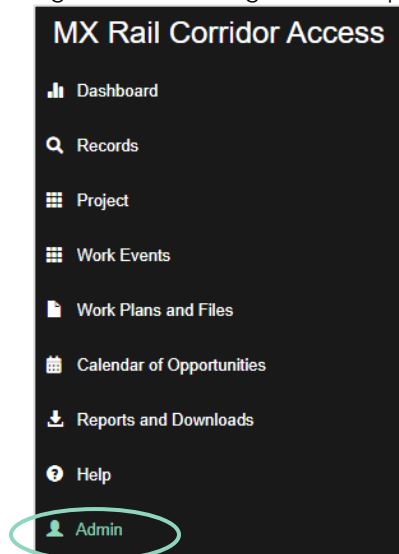
You can use this page to add or delete NAPA users, edit user permissions, and see information about individual NAPA user sessions.

Adding and deleting users

To add a new user:

1. From the *Admin Dashboard*, click **Add User**.

Figure 17: Adding a new user to NAPA

2. Input the user's work email address as the User ID.

3. Select the appropriate User Role (Admin, USRC, RCAC, or Project Dev).

4. Select the user's company.

If the company is not yet in NAPA:

1. Click **Add Company**.
2. Enter the company name.
3. Click **Submit**.

5. Click **Save User**.

To delete a user:

1. From the *Admin Dashboard*, find and click on the user.

2. Click **Delete User**. You will have a chance to review the details before confirming deletion.

Managing user permissions

To add user permissions to projects:

1. From the *Admin Dashboard*, find and click on the user.

2. Click **Edit User**.

3. Click **Add Permission**.

4. Select the Project Number.

5. Select the Access Type (Editor or Review).

6. Click **Save**.

You can also edit or remove user permissions by following steps 1 and 2, then clicking **Edit Permission** or **Remove Permission** accordingly.

Figure 18: Managing user permissions within a project

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