
TPM Toolbox User Guide

Final

Spy Pond Partners



U.S. Department of Transportation
Federal Highway Administration

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Assessment Versions

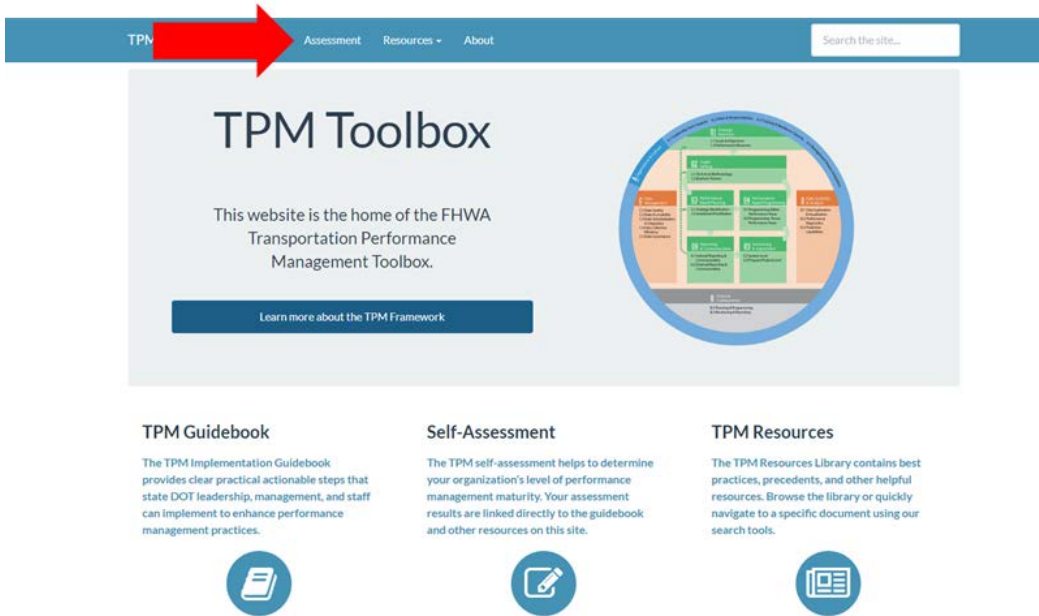


Figure 1: TPM Homepage

To navigate to the assessments Welcome page and select Assessment from the navigation bar.

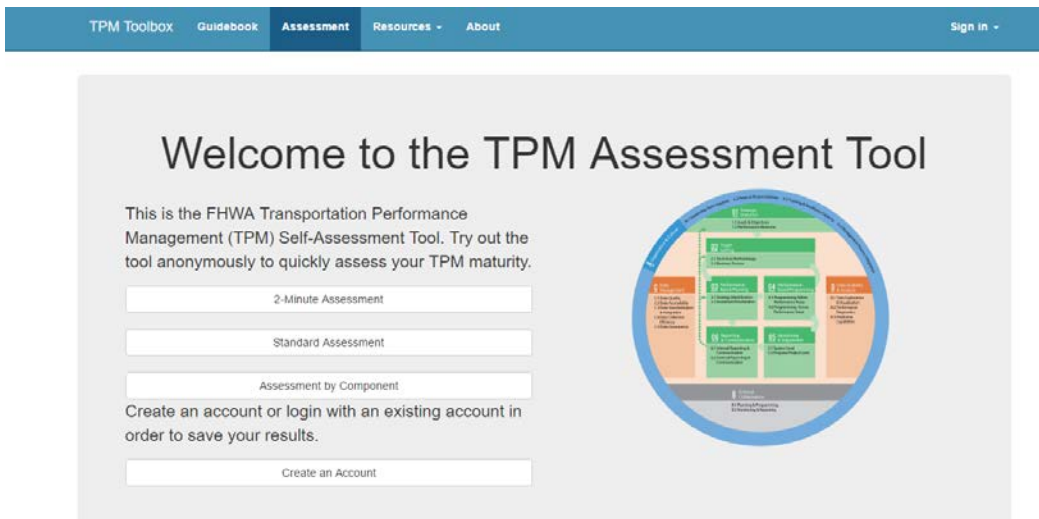


Figure 2: TPM Assessment Front Page

The assessments page displays the different self-assessments available.

2-MINUTE ASSESSMENT

Assesses the 10 components of the TPM Framework; this version does not assess subcomponents. Component maturity level descriptions are presented in matrix form, and users select the description that best matches their agency. **Time estimate: 2 minutes**

1. Select “2-Minute Assessment” from the Assessment homepage.

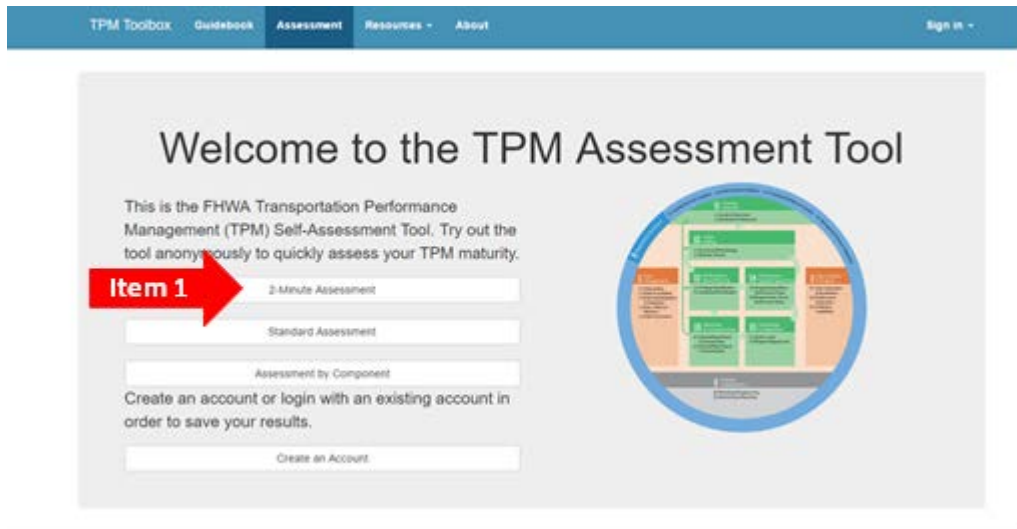


Figure 3: TPM Assessment Front Page

2. Read the instructions on the assessment Welcome page. When ready to start, navigate to the next page of the assessment by clicking “Continue to the Assessment” at the bottom of the page.

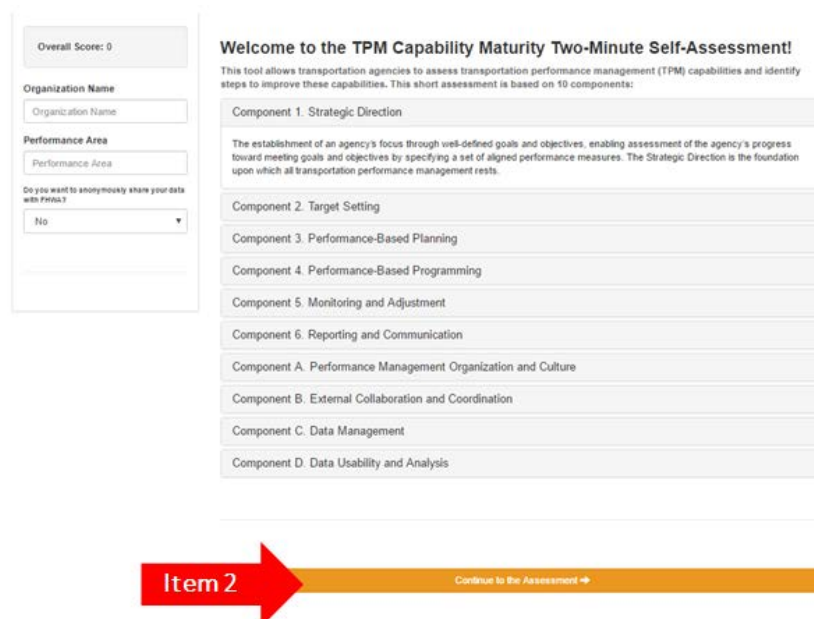


Figure 4: Two-Minute Assessment Welcome Page

- For each number/lettered component listed in the first column, hover your mouse over the maturity to read a longer description of the maturity level. Then click on the maturity level description that best matches your agency (1-5). Continue this process until a level has been selected for all components.

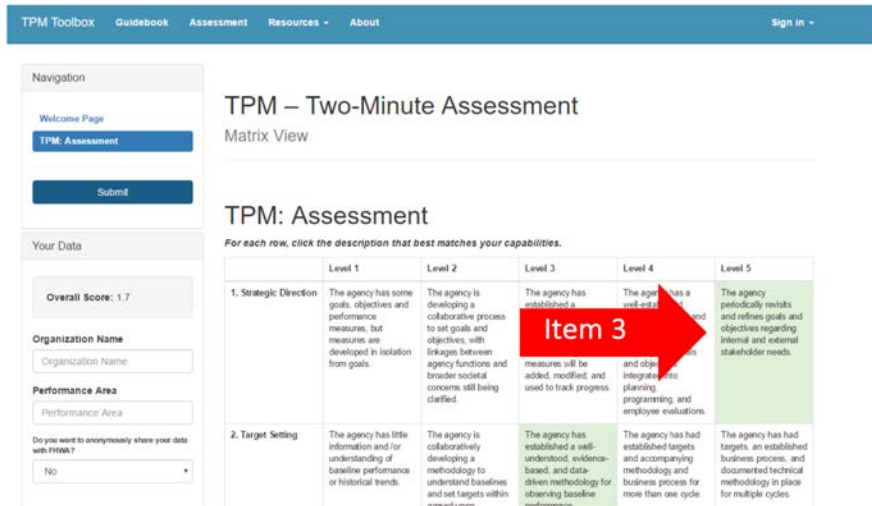


Figure 5: Two-Minute Assessment Matrix

- Decide whether to anonymously share your data with FHWA by selecting Yes or No in the dropdown box in the left side navigation panel. This data will be used to iteratively improve this tool but, as it is anonymous, will not be associated with your organization.

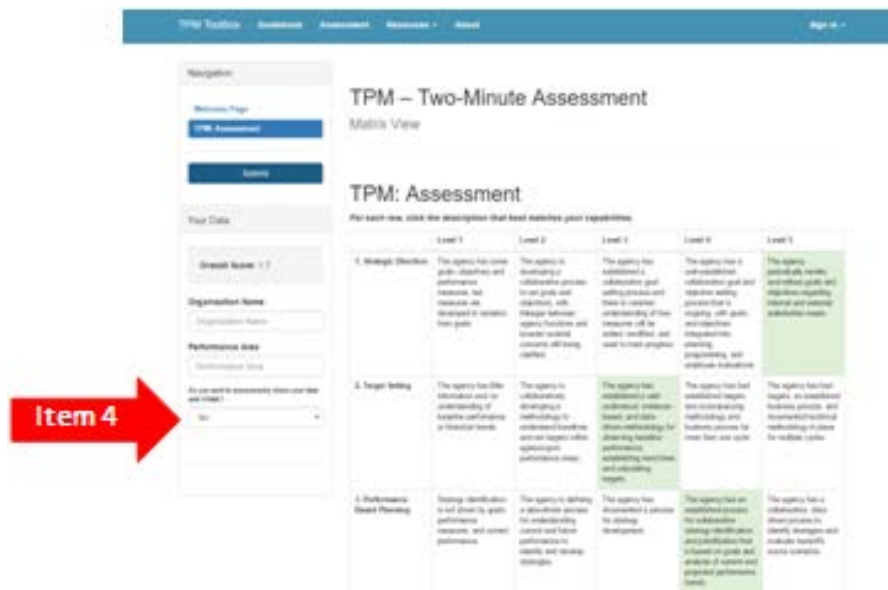


Figure 6: Two-Minute Assessment Matrix – Share Information with FHWA

- Click “Submit” from the left-hand navigation menu.

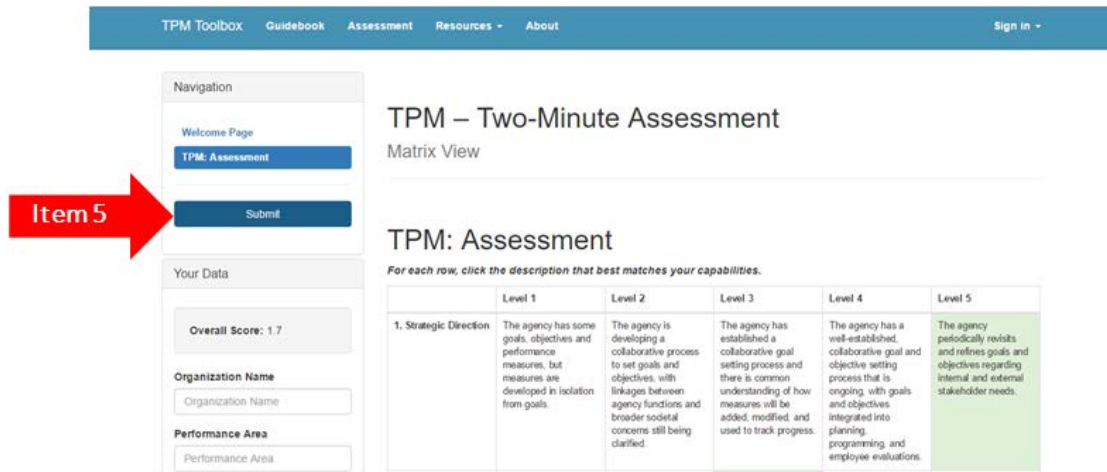


Figure 7: Two-Minute Assessment Matrix - Submit Button

- If you missed a component or components, you will be asked to make a selection before submitting your results.

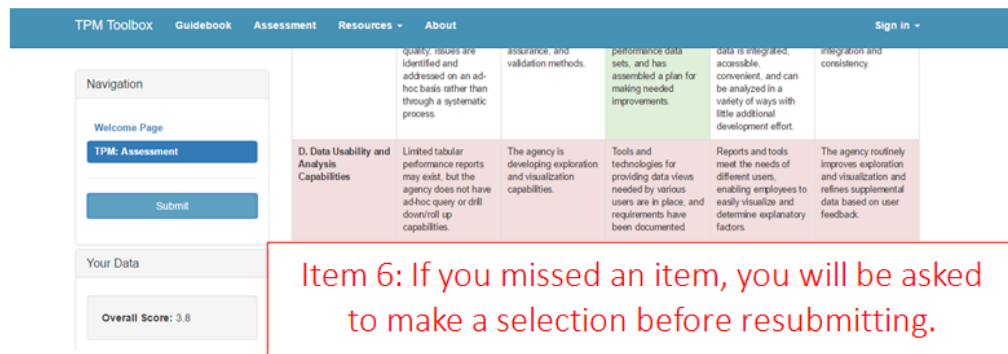


Figure 8: Two-Minute Assessment Matrix - Missed Item

- Review your results. The main chart illustrates the overall maturity level of your organization with respect to transportation performance management.

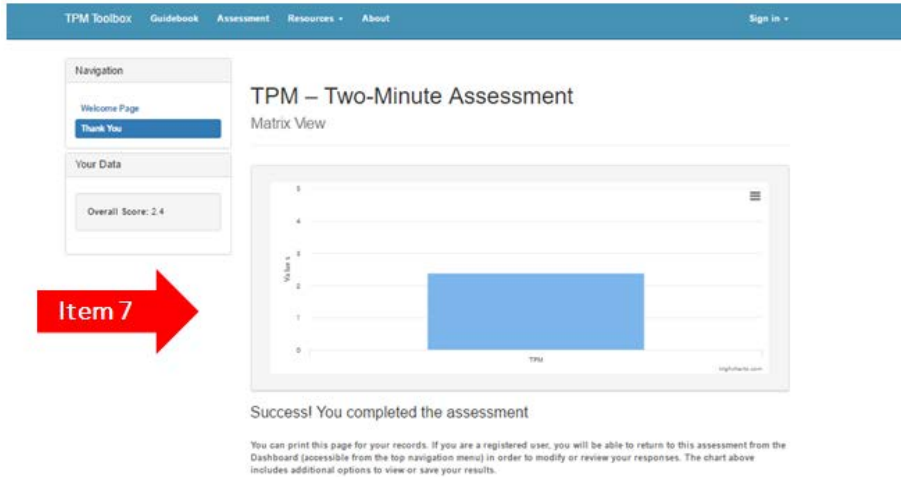


Figure 9: Two- Minute Assessment Results- Result Chart

8. If you would like to print or save this chart, you can do so by clicking on the menu in the top right corner.

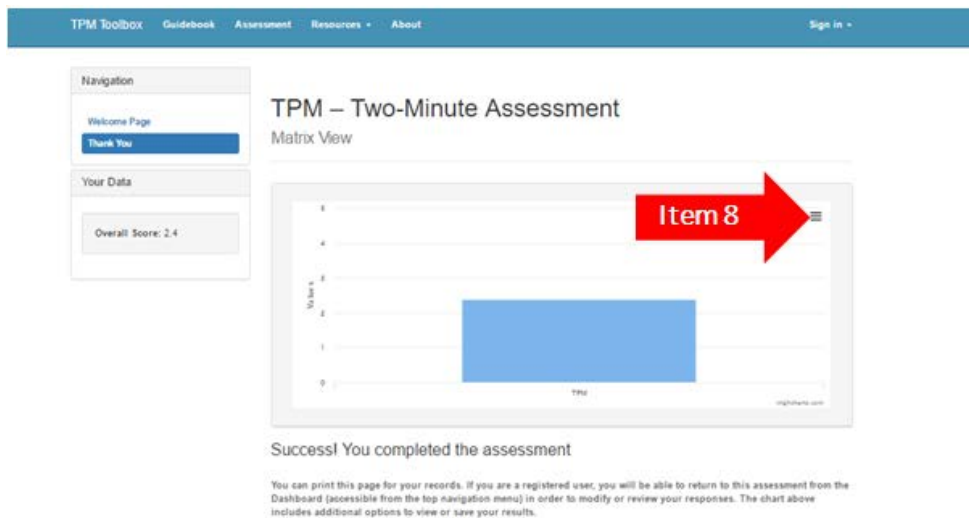


Figure 10: Two-Minute Assessment Results - Image Menu

9. Once you click on the menu, a drop down will give you the option to print the chart or allow you to save it as an image (options to save it as a PNG, JPEG, PDF, or an SVG).

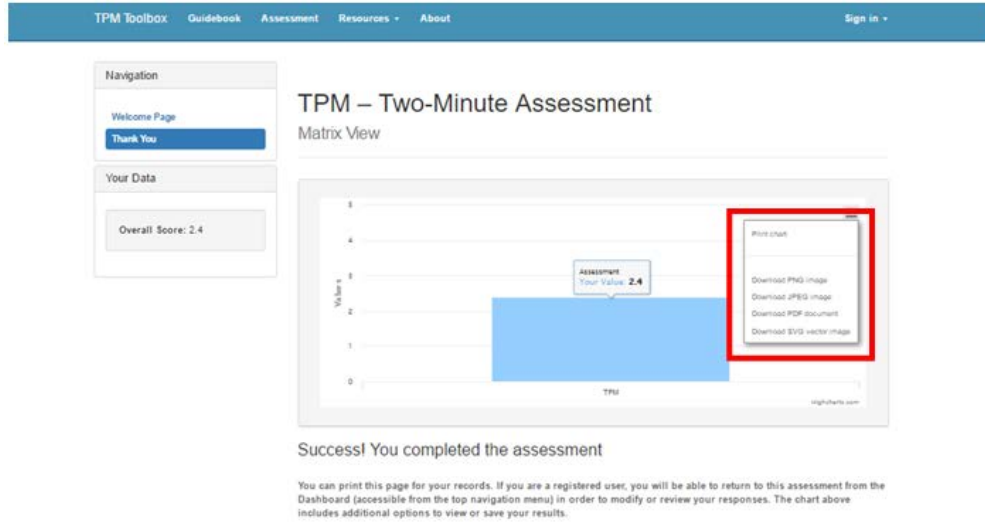


Figure 11: Two- Minute Assessment Results- Printing and Saving Options

10. Below the chart, the first subsection shows what your current assessment level is and what actions your agency needs to take in order to achieve the next level of maturity.

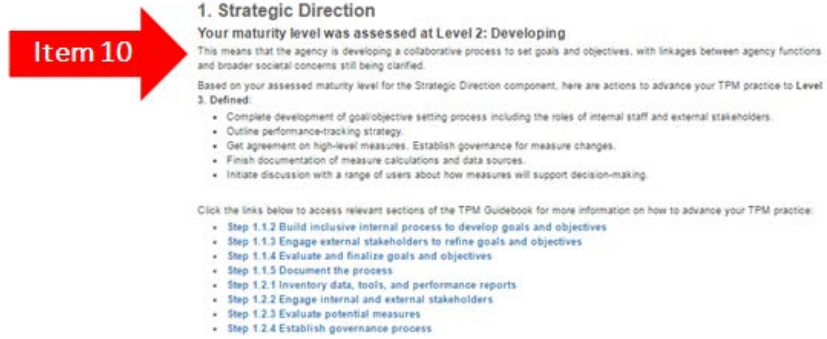


Figure 12: Strategic Direction Results Page- Maturity Level Assessment

11. The next subsection contains links to the different subsections of the TPM Guidebook. The links provided are relevant to your assessed maturity level and provide more detail on implementation steps and examples from other agencies.

1. Strategic Direction

Your maturity level was assessed at Level 2: Developing

This means that the agency is developing a collaborative process to set goals and objectives, with linkages between agency functions and broader societal concerns still being clarified.

Based on your assessed maturity level for the Strategic Direction component, here are actions to advance your TPM practice to Level 3, Defined:

- Complete development of goal/objective setting process including the roles of internal staff and external stakeholders.
- Outline performance-tracking strategy.
- Get agreement on high-level measures. Establish governance for measure changes.
- Finish documentation of measure calculations and data sources.
- Initiate discussion with a range of users about how measures will support decision-making.

Click the links below to access relevant sections of the TPM Guidebook for more information on how to advance your TPM practice:

- [Step 1.1.2 Build inclusive internal process to develop goals and objectives](#)
- [Step 1.1.3 Engage external stakeholders to refine goals and objectives](#)
- [Step 1.1.4 Evaluate and finalize goals and objectives](#)
- [Step 1.1.5 Document the process](#)
- [Step 1.2.1 Inventory data, tools, and performance reports](#)
- [Step 1.2.2 Engage internal and external stakeholders](#)
- [Step 1.2.3 Evaluate potential measures](#)
- [Step 1.2.4 Establish governance process](#)



Figure 13: Strategic Direction Results Page- Relevant Links

12. To print or save the action items and the names of the relevant TPM Guidebook sections, scroll to the bottom of the page and click on “Print this page or save as a PDF”. Select the appropriate print/save settings.

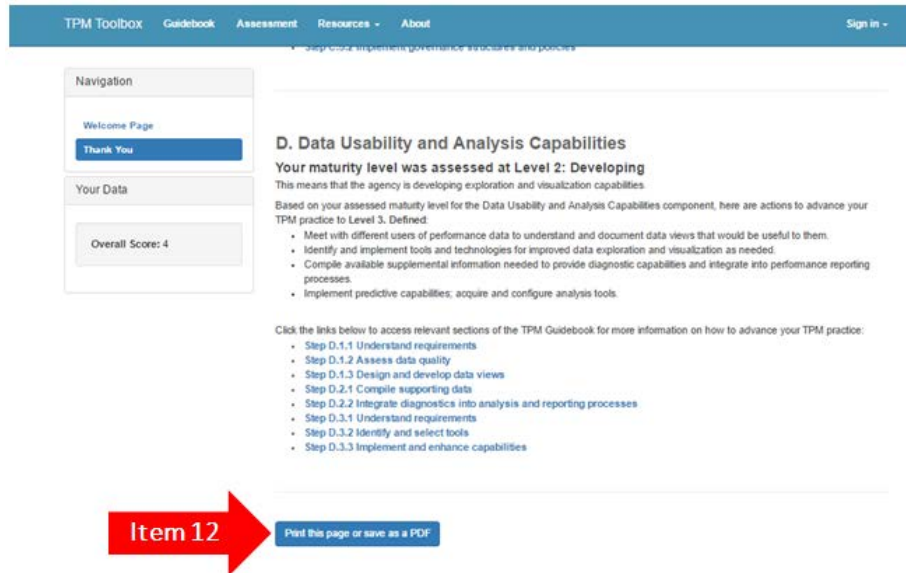


Figure 14: Results Page- Print and Saving as PDF Options

STANDARD ASSESSMENT

Assesses the 26 subcomponents of the TPM Framework; subcomponent maturity level descriptions are presented in discrete parts. **Time estimate: 30 minutes**

1. From the Assessment homepage, select “Standard Assessment”.

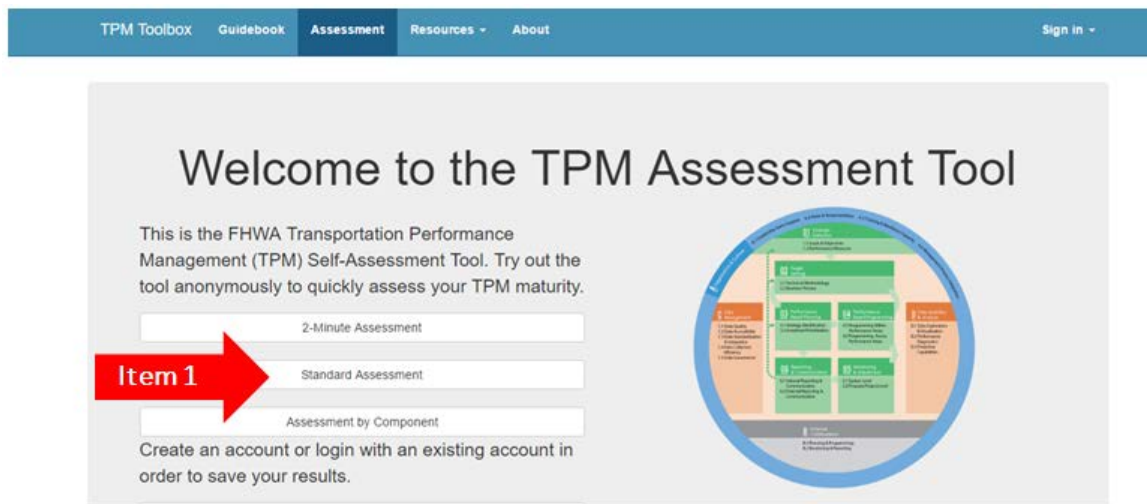


Figure 15: TPM Assessment Front Page- Standard Assessment Option

2. Read the instructions on the assessment Welcome page. When ready to start, navigate to the next page of the assessment by clicking on “Continue to the Assessment” at the bottom of the page or “Next” from the left hand navigational menu.

The screenshot displays the 'TPM – Standard Full Assessment' interface. At the top, a navigation bar includes 'TPM Toolbox', 'Guidebook', 'Assessment', 'Resources', and 'About', along with a 'Sign in' link. A left-hand navigation menu lists sections from 'Welcome Page' to 'Data Usability and Analysis'. The main content area is titled 'TPM – Standard Full Assessment Matrix View' and includes a warning message about logging in. Below this is a 'Welcome to the TPM Standard Maturity Assessment' section, followed by a list of 10 components: Strategic Direction, Target Setting, Performance-Based Planning, Performance-Based Programming, Monitoring and Adjustment, Reporting and Communication, Performance Management Organization and Culture, External Collaboration and Coordination, Data Management, and Data Usability and Analysis. Each component has a brief description and a list of sub-components. At the bottom, there are buttons for 'Previous', 'Next', and 'Submit', with a red arrow pointing to the 'Submit' button labeled 'Item 2'. Another red arrow points to a 'Continue to the Assessment' button at the bottom of the page, also labeled 'Item 2'.

Figure 16: TPM Standard Full Assessment Page- Navigating (Starting and Submitting) Assessment

- Each component has a separate page within the assessment, with respective subcomponents listed on each page. For each subcomponent, read the maturity descriptions under each level for each component area and select the maturity level description that best matches your agency. Continue this process until a level has been selected for each subcomponent area on the page.

The screenshot shows the 'TPM – Standard Full Assessment Matrix View' for '1: Strategic Direction'. A table with 5 columns (Level 1 to Level 5) and 1 row (1.1 Goals and Objectives) is displayed. A red arrow labeled 'Item 3' points to the Level 4 cell. The navigation menu on the left has 'Next' highlighted.

| | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 |
|---------------------------------|--|--|--|---|---|
| 1.1 Goals and Objectives | Agency goals/objectives developed in isolation and without an understanding of agency and regional priorities. Goals/objectives do not provide a clear strategic direction for the agency and are not used in decision-making. | A collaborative process to establish goals/objectives under development. Baseline performance information being used to create context about key issues. Linkages between agency core functions and broader societal concerns being clarified. | The agency has agreed on a process for goal development including roles of internal staff, external stakeholder involvement, and steps to formally adopt goals/objectives. A strategy outlined to support tracking of goal/objective progress. | Collaborative process to define goals/objectives is well established. There is substantive discussion about the relative priority of different goals. There is ongoing coordination of goals/objectives across planning documents. Goals/objectives are integrated into planning, programming and employee performance evaluations. | Goals/objectives periodically refined to better reflect agency's priorities, communicate transportation's role in broader societal concerns, and reflect new challenges and risk factors. Goals/objectives are part of the agency culture. Employees understand how their actions support the achievement of goals. |

Figure 17: Standard Full Assessment Matrix

- When you are finished, move on to the next component area by selecting “Next” from the left-hand menu.

The screenshot shows the same 'TPM – Standard Full Assessment Matrix View' for '1: Strategic Direction'. In this view, the 'Next' button in the navigation menu is highlighted with a red arrow labeled 'Item 4'. The table content is identical to Figure 17.

Figure 18: Standard Full Assessment Matrix- Next Button

- Repeat the process until you have made selections for all 26 subcomponents. Remember to scroll to the bottom of every page as the number of subcomponents varies by component.

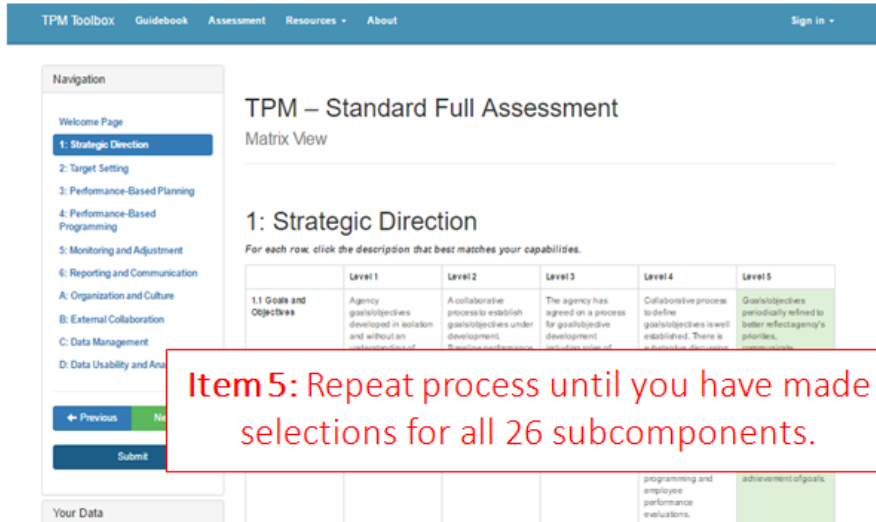


Figure 19: Standard Full Assessment Matrix- Reminder for 26 subcomponents

- Decide whether to anonymously share your data with FHWA by selecting Yes or No in the dropdown box in the left side navigation panel. This data will be used to iteratively improve this tool but, as it is anonymous, will not be associated with your organization.

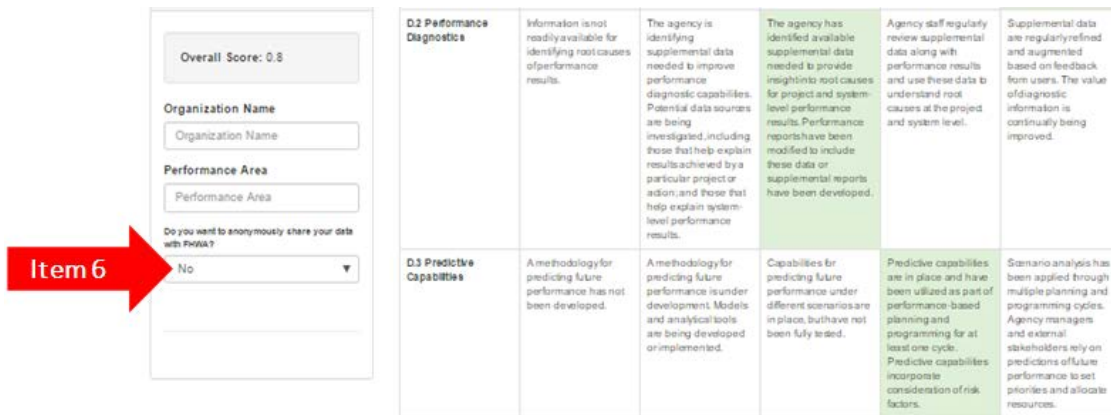


Figure 20: Standard Full Assessment Matrix- Option for Submitting Anonymously

- Once you have filled out the matrix for all 26 subcomponents, click “Submit” from the left-hand navigation menu.

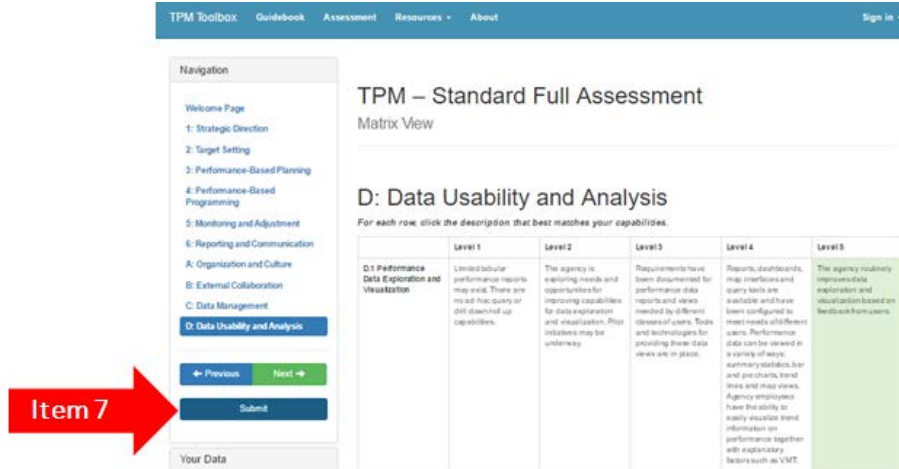


Figure 21: Standard Full Assessment Matrix- Submit Button

8. If you missed a component or components, you will be asked if you would prefer to score the areas that have been answered, or if you would like to go back to finish the assessment.
 - a. If you would like to just score the areas that have been complete, select “Click Here” (a.1). Then select “Submit” from the left-hand navigation menu (a.2). This will automatically give the unanswered areas the lowest maturity level.
 - b. If you would like to complete the assessment, select “Close” (b) and continue to complete the assessment. The areas that went unanswered will be highlighted in red.

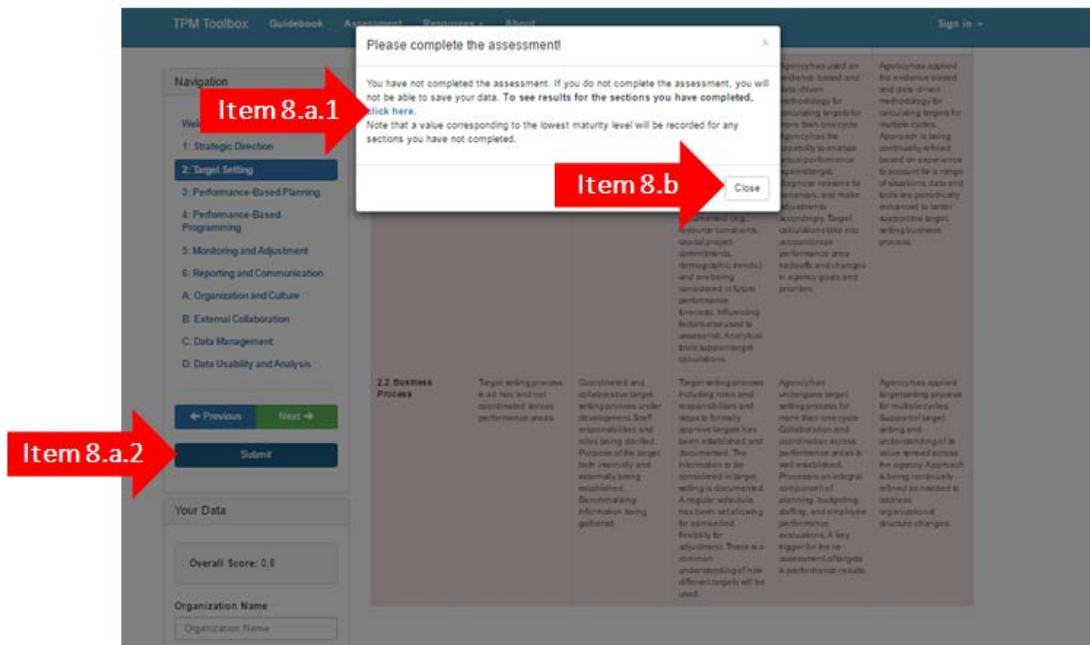


Figure 22: Standard Full Assessment Matrix- Reminder to Complete Assessment before Submitting

- 9. Review your results. The main bar chart illustrates the overall maturity level of your organization with respect to transportation performance management.

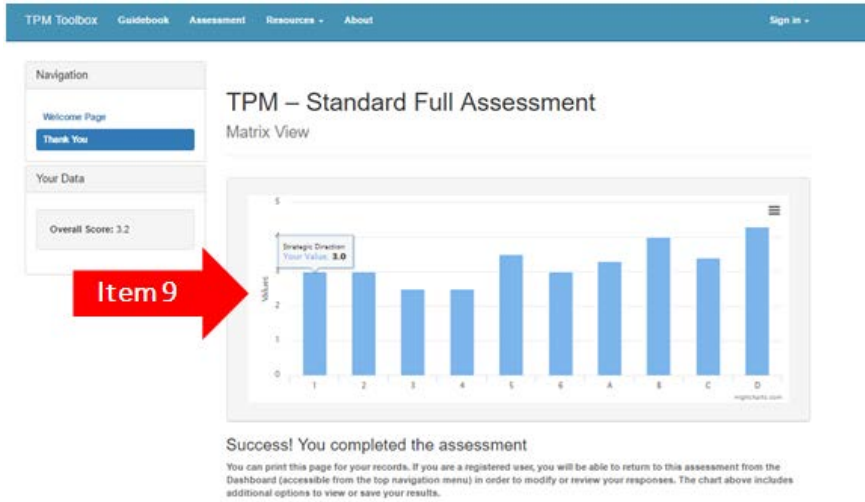


Figure 23: Standard Full Assessment- Results Chart

- 10. If you would like to print or save this chart, you can do so by first clicking on the menu in the top right corner. Once you click this, a dropdown menu will appear and give you the option to print the chart or save the chart as a PNG, JPEN, PDF or an SVG.

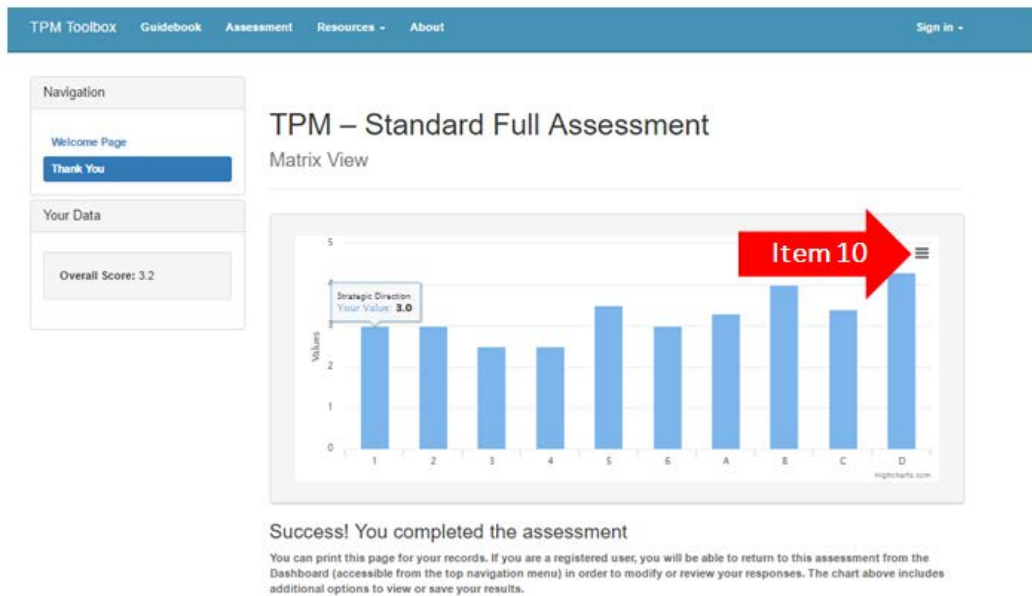


Figure 24: Standard Full Assessment- Menu Options for Results Page

- 11. Below the chart, the first subsection shows what your current assessment level is and what actions your agency needs to take in order to achieve the next level of maturity.

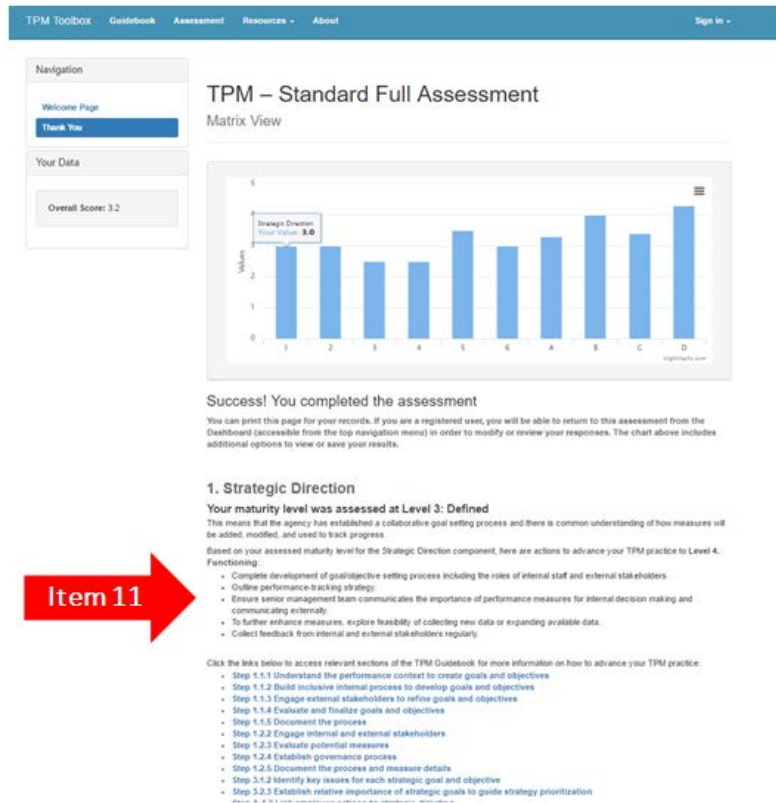


Figure 25: Standard Full Assessment Results Page- Maturity Level Assessment

- The next subsection contains links to the different subsections of the TPM Guidebook. The links provided are relevant to your assessed maturity level and provide more detail on implementation steps and examples from other agencies for how your agency may advance its level of maturity for the particular component area.

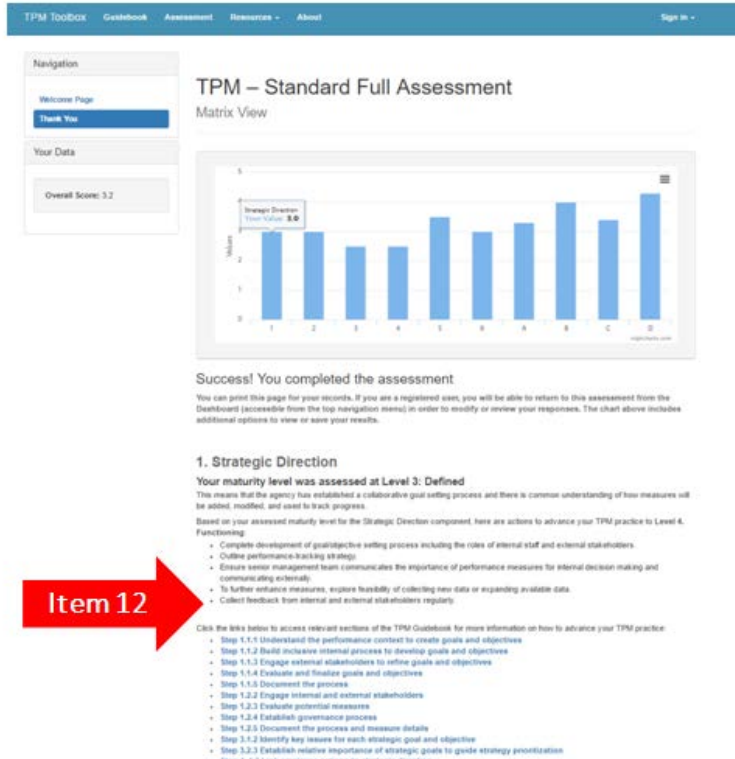


Figure 26: Standard Full Assessment Results Page- Relevant Links

13. To print or save the action items and the names of the relevant TPM Guidebook sections, scroll to the bottom of the page and click on "Print this page or save as a PDF". Select the appropriate print/save settings.

The screenshot shows a web interface for the TPM Toolbox Assessment. At the top is a navigation bar with links for 'TPM Toolbox', 'Guidebook', 'Assessment', 'Resources', and 'About', along with a 'Sign in' button. On the left side, there is a 'Navigation' sidebar with a 'Welcome Page' and a 'Thank You' button, and a 'Your Data' section showing an 'Overall Score: 3.2'. The main content area displays the results for 'D. Data Usability and Analysis', stating that the maturity level was assessed at Level 4: Functioning. It includes a list of actions to advance to Level 5, such as meeting with data users and obtaining feedback. A red arrow labeled 'Item 13' points to a 'Print this page or save as a PDF' button.

Figure 27: Standard Full Assessment Results Page- Option to Print or Save as PDF

ASSESSMENT BY COMPONENT

Assesses by individual component area that the user selects. **Time estimate: 1 minute**

1. From the Assessment homepage, select “Assessment by Component”.

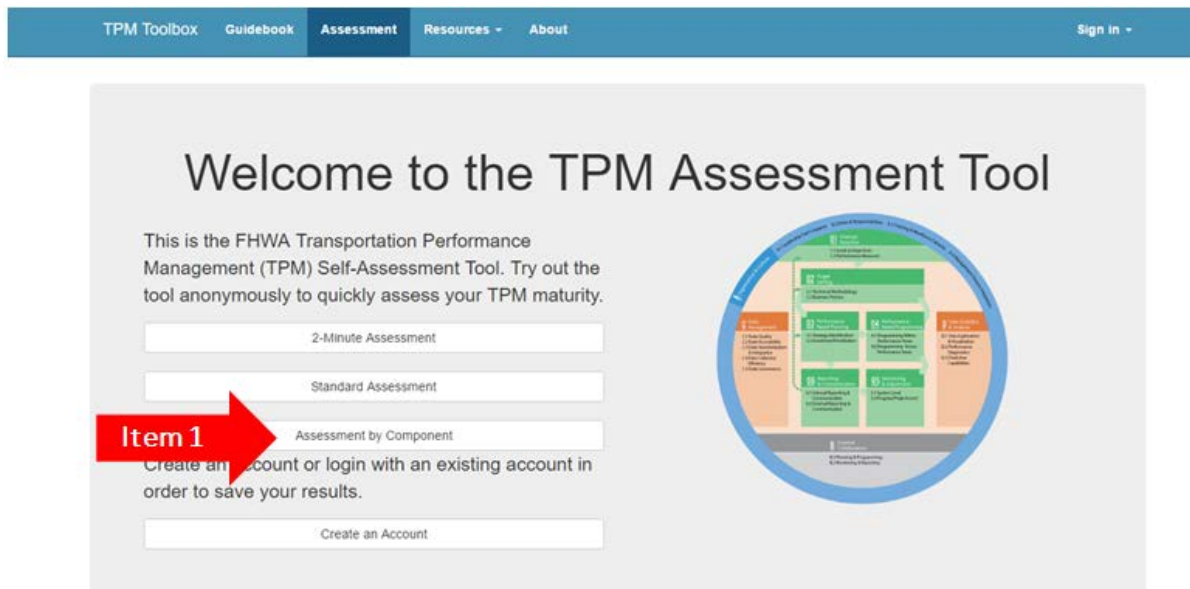


Figure 28: TPM Assessment Front Page- Assessment by Component Option

2. For each component level listed, click on the component name and read the description of the component area. Once you have decided which component level to assess, click on the button at the bottom of the description to continue to that particular assessment.

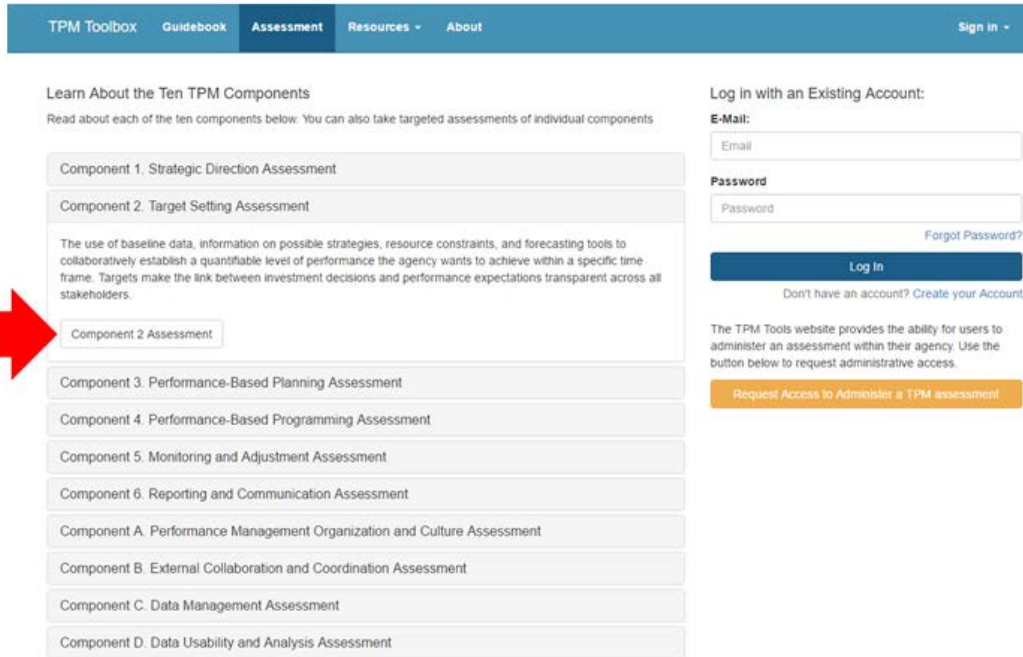


Figure 29: Assessment by Components Page- Component Assessment Button

3. Read the instructions on the Welcome page for the component’s assessment. When ready to start, navigate to the next page of the assessment by clicking on “Continue to the Assessment” at the bottom of the page.

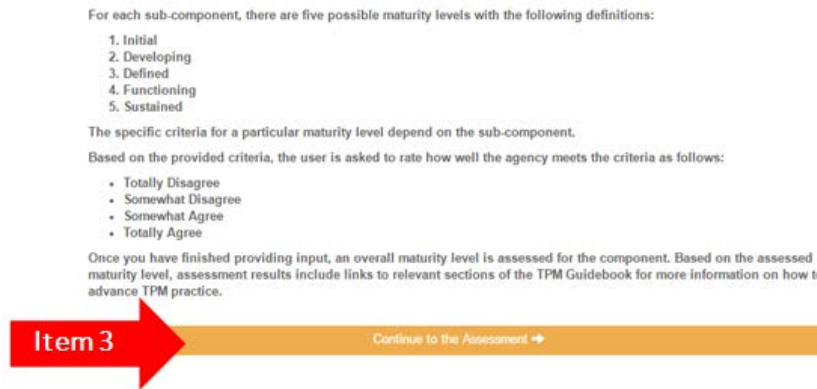


Figure 30: Assessment by Component Page- Continue to the Assessment Button

4. For each component area, read the maturity descriptions under each level for each component area and select the maturity level description that best matches your agency. Continue this process until a level has been selected for all components.

The screenshot shows the 'Component 2. Target Setting' matrix view. On the left is a navigation panel with '2: Target Setting' selected and a 'Submit' button. Below that is a 'Your Data' section with an 'Overall Score: 4.0', 'Organization Name' field, 'Performance Area' field, and a dropdown for 'Do you want to anonymously share your data with FHWA?' set to 'No'. The main content area displays the matrix with five levels. A red arrow labeled 'Item 4' points to the Level 4 column description.

| | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 |
|---------------------------|--|--|---|---|---|
| 2.1 Technical Methodology | Targets do not exist, or defined without an understanding of baseline performance, trends, the connection between strategies and results or analysis of what is feasible to achieve. | Evidence-based and data-driven methodology for calculating targets under development. Baseline data being assembled and reviewed. Analysis of historical trends initiated. | Evidence-based and data-driven methodology for calculating targets has been developed and documented. Target parameters defined (format, geography/ scope and time horizon). External and internal influencing factors have been identified and documented (e.g., resource constraints, capital project commitments, demographic trends.) and are being considered in future performance forecasts. Influencing factors also used to assess risk. Analytical tools support target calculations. | Agency has used an evidence-based and data-driven methodology for calculating targets for more than one cycle. Agency has the capability to analyze actual performance against target, diagnose reasons for variances, and make adjustments accordingly. Target calculations take into account cross performance area tradeoffs and changes in agency goals and priorities. | Agency has applied the evidence-based and data-driven methodology for calculating targets for multiple cycles. Approach is being continuously refined based on experience to account for a range of situations; data and tools are periodically enhanced to better support the target setting business process. |

Figure 31: Assessment by Component Matrix

- Decide whether to anonymously share your data with FHWA by selecting Yes or No in the dropdown box in the left side navigation panel. This data will be used to iteratively improve this tool but, as it is anonymous, will not be associated with your organization.

This screenshot is similar to Figure 31 but highlights the 'Do you want to anonymously share your data with FHWA?' dropdown menu. A red arrow labeled 'Item 5' points to the 'No' option.

Figure 32: Assessment by Component Matrix- Option to Submit Anonymously

- Click "Submit" from the left-hand navigational menu.

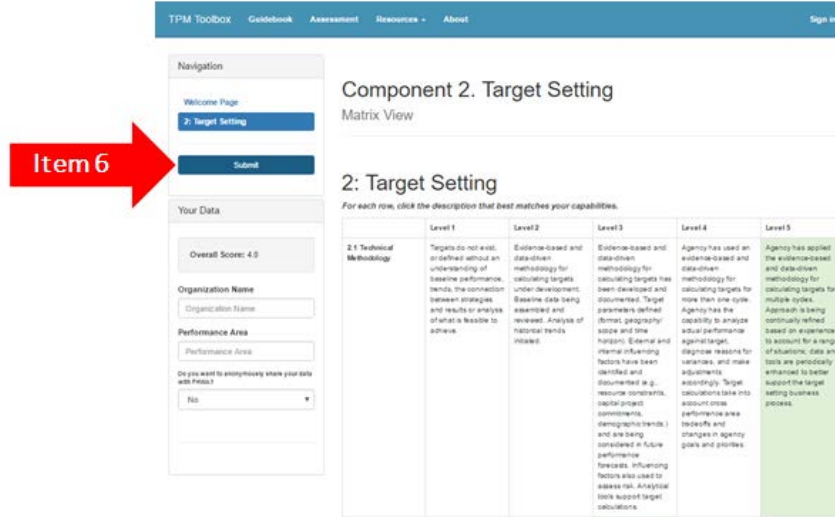


Figure 33: Assessment by Component Matrix- Submit Button

- Review your results. The main chart illustrates the overall maturity level of your organization with respect to transportation performance management.

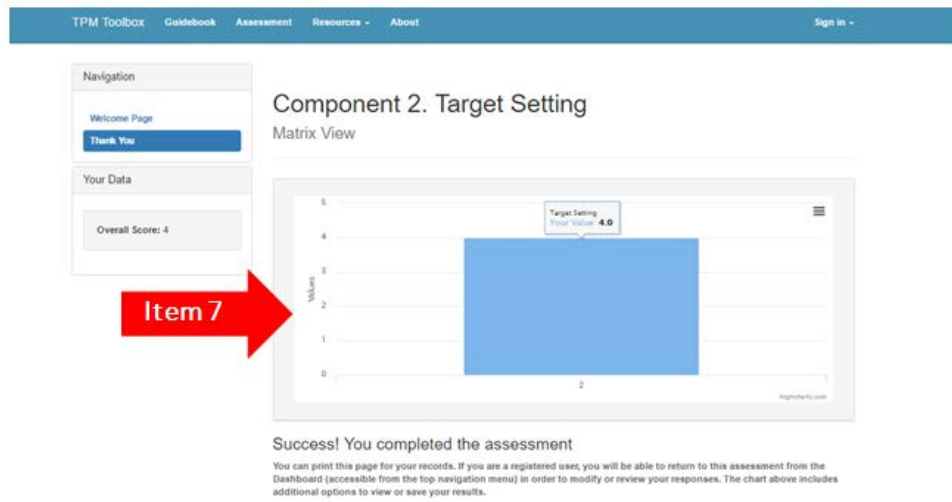


Figure 34: Assessment by Components Result Page- Results Chart

- If you would like to print or save this chart, you can do so by first clicking on the menu in the top right corner. Once you click this, a dropdown menu will appear and give you the option to print the chart or save the chart as a PNG, JPEN, PDF or an SVG.

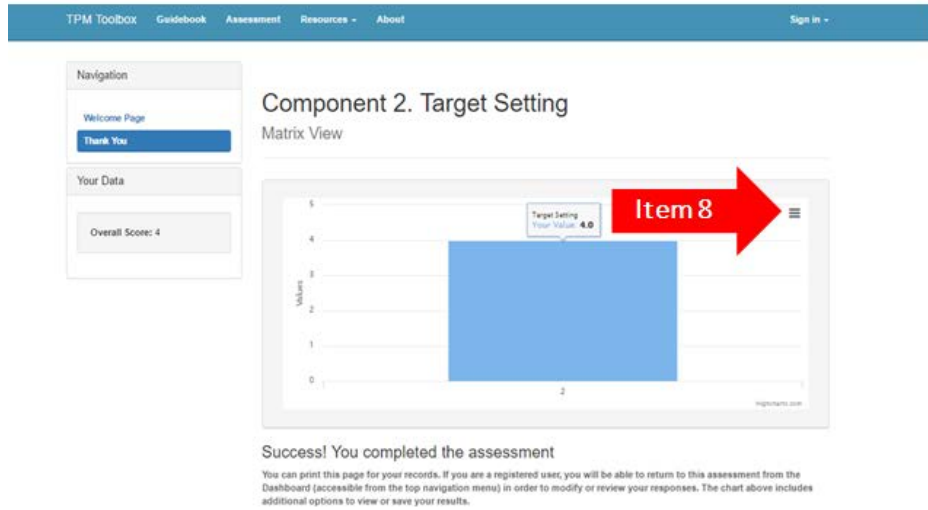


Figure 35: Assessment by Components Results Page- Menu Option

- Below the chart, the first subsection shows what your current assessment level is and what actions your agency needs to take in order to achieve the next level of maturity.

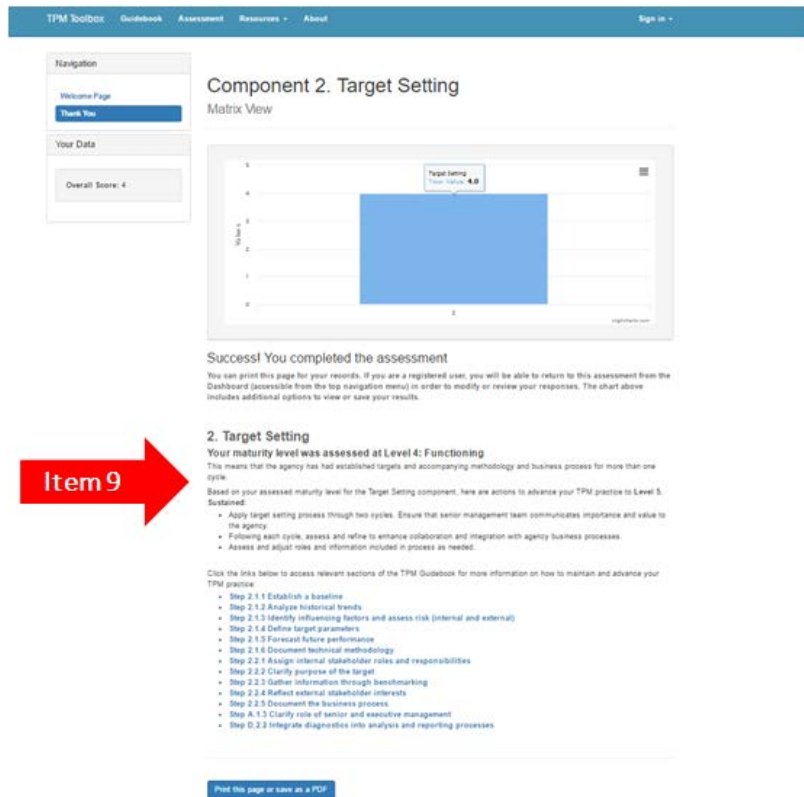


Figure 36: Assessment by Components Results Page- Maturity Level Assessment

- The next subsection contains links to the different subsections of the TPM Guidebook. The links provided are relevant to your assessed maturity level and provide more detail on implementation steps and

examples from other agencies for how your agency may advance its level of maturity for the particular component area.

2. Target Setting
Your maturity level was assessed at Level 4: Functioning
 This means that the agency has had established targets and accompanying methodology and business process for more than one cycle.
 Based on your assessed maturity level for the Target Setting component, here are actions to advance your TPM practice to Level 5, Sustained.

- Apply target setting process through two cycles. Ensure that senior management team communicates importance and value to the agency.
- Following each cycle, assess and refine to enhance collaboration and integration with agency business processes.
- Assess and adjust roles and information included in process as needed.

Click the links below to access relevant sections of the TPM Guidebook for more information on how to maintain and advance your TPM practice:

- Step 2.1.1 Establish a baseline
- Step 2.1.2 Analyze historical trends
- Step 2.1.3 Identify influencing factors and assess risk (internal and external)
- Step 2.1.4 Define target parameters
- Step 2.1.5 Forecast future performance
- Step 2.1.6 Document technical methodology
- Step 2.2.1 Assign internal stakeholder roles and responsibilities
- Step 2.2.2 Clarify purpose of the target
- Step 2.2.3 Gather information through benchmarking
- Step 2.2.4 Reflect external stakeholder interests
- Step 2.2.5 Document the business process
- Step A.1.3 Clarify role of senior and executive management
- Step D.2.2 Integrate diagnostics into analysis and reporting processes

Print this page or save as a PDF

Figure 37: Assessments by Components Results Page- Relevant Links

11. To print or save the action items and the names of the relevant TPM Guidebook sections, scroll to the bottom of the page and click on “Print this page or save as a PDF”. Select the appropriate print/save settings.

TPM Toolbox | Guidebook | Assessment | Resources | About | Sign In

Navigation
 Welcome Page
 Thank You
 Your Data
 Overall Score: 4

Component 2. Target Setting
 Matrix View

Success! You completed the assessment
 You can print this page for your records. If you are a registered user, you will be able to return to this assessment from the Dashboard (accessible from the top navigation menu) in order to modify or review your responses. The chart above includes additional options to view or save your results.

2. Target Setting
Your maturity level was assessed at Level 4: Functioning
 This means that the agency has had established targets and accompanying methodology and business process for more than one cycle.
 Based on your assessed maturity level for the Target Setting component, here are actions to advance your TPM practice to Level 5, Sustained.

- Apply target setting process through two cycles. Ensure that senior management team communicates importance and value to the agency.
- Following each cycle, assess and refine to enhance collaboration and integration with agency business processes.
- Assess and adjust roles and information included in process as needed.

Click the links below to access relevant sections of the TPM Guidebook for more information on how to maintain and advance your TPM practice:

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- Step 2.1.3 Identify influencing factors and assess risk (internal and external)
- Step 2.1.4 Define target parameters
- Step 2.1.5 Forecast future performance
- Step 2.1.6 Document technical methodology
- Step 2.2.1 Assign internal stakeholder roles and responsibilities
- Step 2.2.2 Clarify purpose of the target
- Step 2.2.3 Gather information through benchmarking
- Step 2.2.4 Reflect external stakeholder interests
- Step 2.2.5 Document the business process
- Step A.1.3 Clarify role of senior and executive management
- Step D.2.2 Integrate diagnostics into analysis and reporting processes

Print this page or save as a PDF

Figure 38: Assessments by Components Results Page- Option to Print or Save as PDF

Types of Users

ASSESSMENT USERS

Option 1: No Account Necessary

This option is for users who want to quickly assess their agency. Once their browser window is closed, the assessment results will be erased – users will not be able to view them again unless they re-take the assessment. This option is available for all assessments.

Option 2: Account Required

This option allows users to view their past assessment results. By logging into their account, the information is saved and can be reviewed in the future by logging in again. Users can edit past assessments as well as re-assess their agency and compare to prior assessment results. Results cannot be aggregated by agency; to enable this capability, users must complete assessments sent to them by an administrator (see below).

1. Navigate to <https://www.tpmtools.org/>.
2. Click on the “Resources” dropdown bar and select Assessment from the navigation bar.



Figure 39: TPM Toolbox Homepage- Resources Button

- On the Assessments homepage, select “Create an Account”.

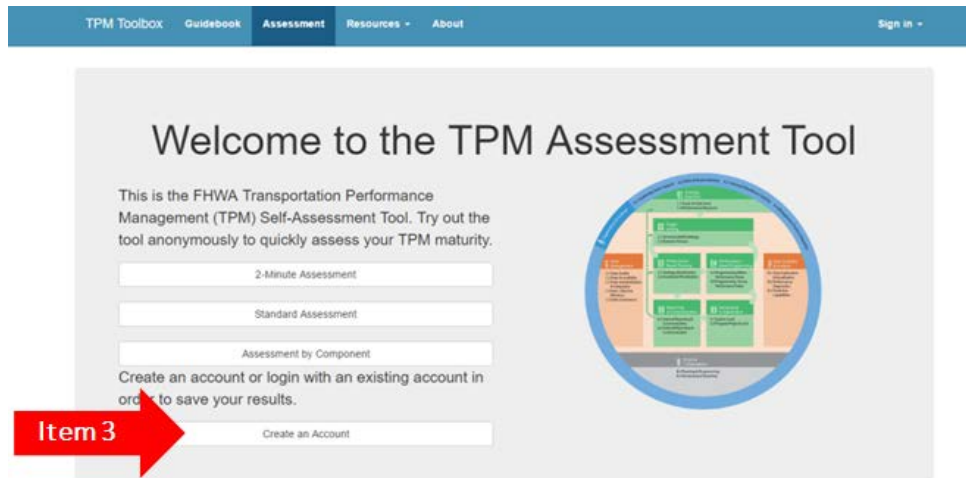


Figure 40: TPM Assessment Front Page- Create an Account Option

- Enter first and last name, organization, and email.

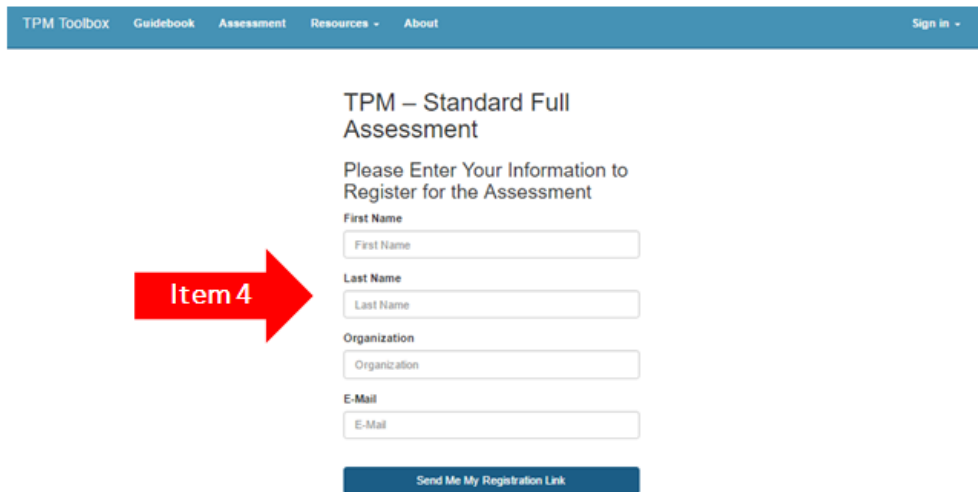


Figure 41: TPM Standard Full Assessment Account Registration

- Click “Send Me My Registration Link”.

TPM Toolbox Guidebook Assessment Resources - About Sign in -

TPM – Standard Full Assessment

Please Enter Your Information to Register for the Assessment

First Name

Last Name

Organization

E-Mail

Item 5 →

Figure 42: TPM Standard Full Assessment Account Registration- Registration Link Button

- Find the email from admin@tpmtools.org. Emails may be marked as spam; check your spam box.

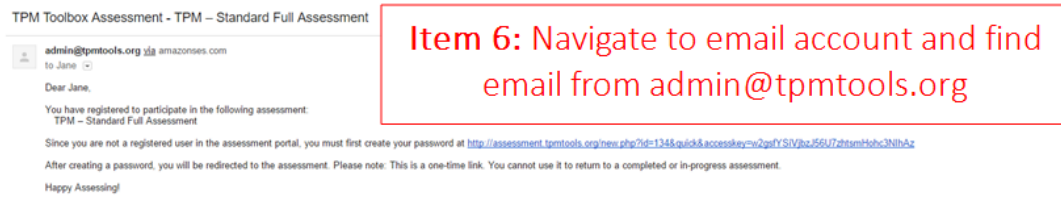


Figure 43: TPM Standard Full Assessment Registration Confirmation Email

- Click the registration link to complete your registration. Note: this is a one-time use link. It cannot be used to return to your account or a particular assessment.

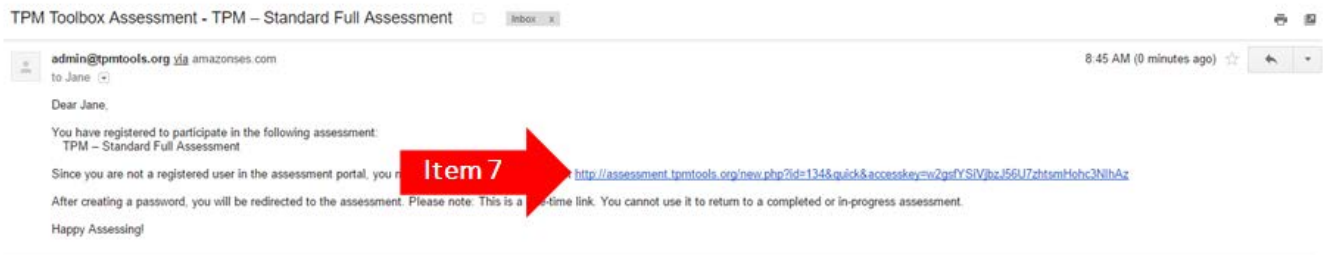


Figure 44: Registration Confirmation Email- Confirmation Link

- The link will bring you back to the TPM Tools website where you will type your account password.

Welcome, Jane

Please Set Your Password

Password

Confirm Password

Submit

Figure 45: TPM Tool Account Sign-in Page

9. Click “Submit” to set your account password.

Welcome, Jane

Please Set Your Password

Password

Confirm Password

Submit

Figure 46: TPM Account Sign In- Submit Button

10. You are automatically redirected to the Standard Assessment homepage. Note the green box at the top of the screen which states that you are now logged-in and registered for the assessment. When you complete the assessment, your results will be saved in your profile.

TPM Toolbox Guidebook Assessment Resources - About Dashboard ema.c.yamamoto@gmail.com - Log Out

Navigation

Welcome Page

1: Strategic Direction

2: Target Sett

3: Performance-Based Planning

4: Performance-Based Programming

5: Monitoring and Adjustment

6: Reporting and Communication

A: Organization and Culture

B: External Collaboration

C: Data Management

D: Data Usability and Analysis

TPM – Standard Full Assessment

You are logged-in and registered for this assessment. Congratulations! You must complete the assessment in order to save your results.

Welcome to the TPM Standard Maturity Assessment.

This tool allows transportation agencies to assess their TPM capabilities and identify areas where they can take steps to improve these capabilities. The assessment is based on 10 components:

Component 1. Strategic Direction

The establishment of an agency's focus through well-defined goals and objectives, enabling assessment of the agency's progress toward meeting goals and objectives by specifying a set of aligned performance measures. The Strategic Direction is the foundation

Figure 47: TPM Standard Assessment Homepage- redirected after logging in

11. To log out of your account, click your email address from the top navigational menu. Click “Log Out”.



Figure 48: TPM Standard Assessment Homepage- Log out Button

12. At any time, you can visit the Dashboard by clicking “Dashboard” on the top navigational menu.

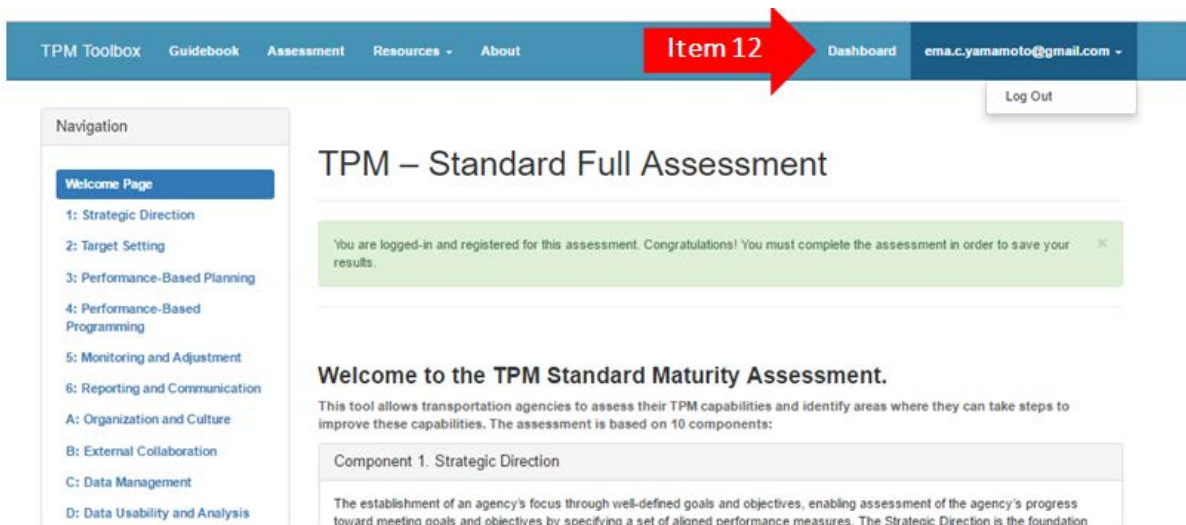


Figure 49: TPM Standard Full Assessment- Dashboard Button

13. Assessment versions you have registered for are listed. To take an assessment you are registered for click on the assessment.

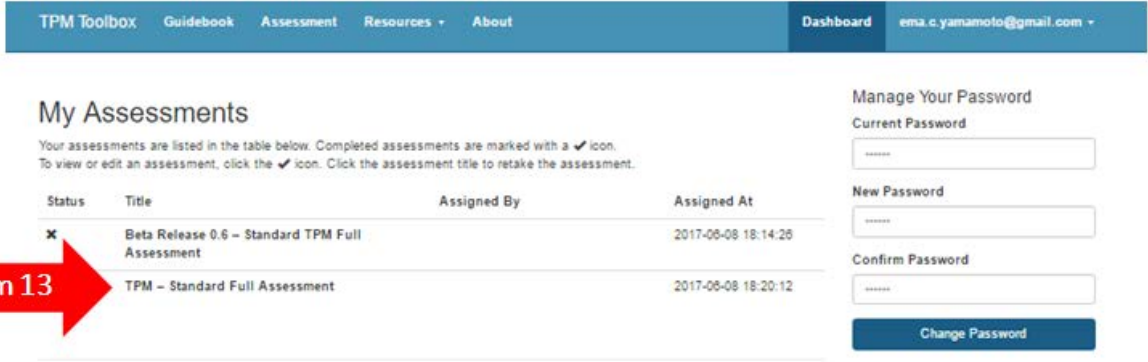


Figure 50: Registered Assessments Page

- To the left of the assessment names are symbols which show the status of the assessment. A check mark indicates that the assessment has been completed at least once. An “X” means that the assessment has not been completed. Click on the check mark to see the results of your past assessment.



Figure 51: Registered Assessments Page- Complete/ Incomplete Assessment

- When you click on the check mark, a dialogue box will show your past submissions for that particular assessment and the date/time they were submitted.

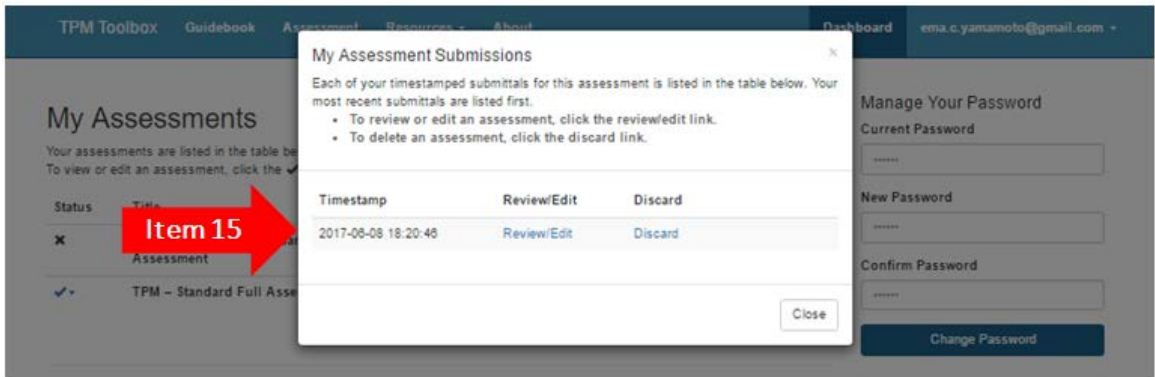


Figure 52: Registered Assessments Page- Date/ Timestamp of Submission

16. Selecting Review/Edit allows you to see your responses for each component/subcomponent. If you change the responses as they appear and click submit, a new submission is recorded in your Dashboard. To select review/edit a particular submission, click on “Review/Edit” of the corresponding submission date/time.

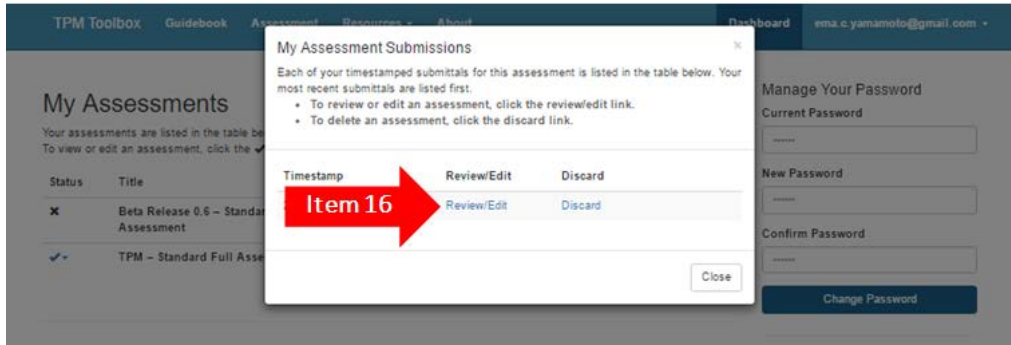


Figure 53: Registered Assessment- Options to Review/ Edit Submitted Assessments

17. To discard a submission, click “Discard” next to the particular submission. Careful – this action cannot be undone.

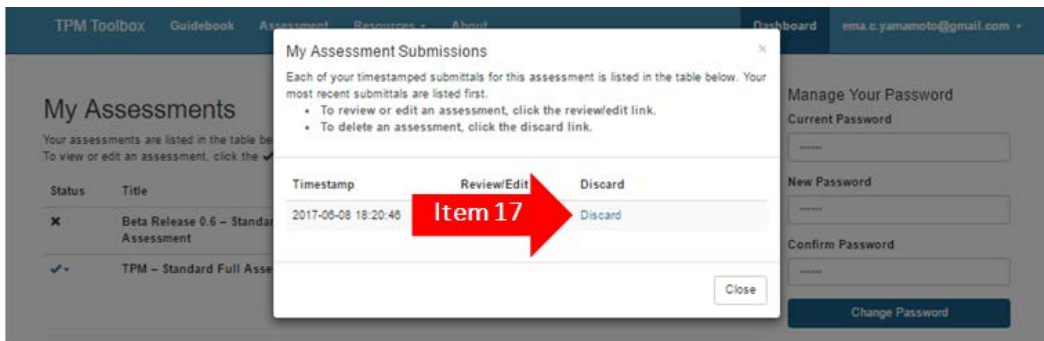


Figure 54: Registered Assessment- Option to Discard Submitted Assessment

18. From the Dashboard, you can change your password at any time using the form on the right side of the Dashboard page. Enter the current and new password and click “Change Password”.

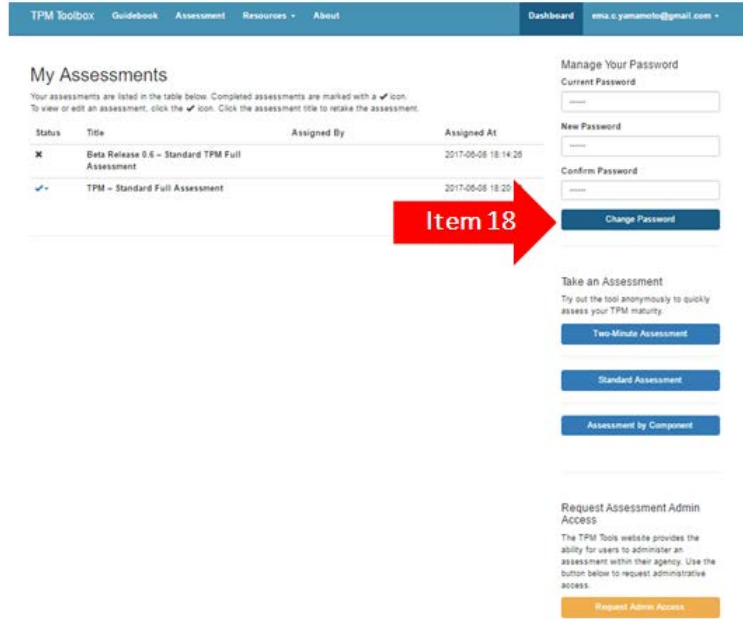


Figure 55: Assessment Dashboard Page- Change Password Button

- To take an assessment anonymously, you can select any of the three assessments from the right-hand menu. When you take any of these assessments, you will not be registered for the assessment and will not be able to access the results once you are finished.

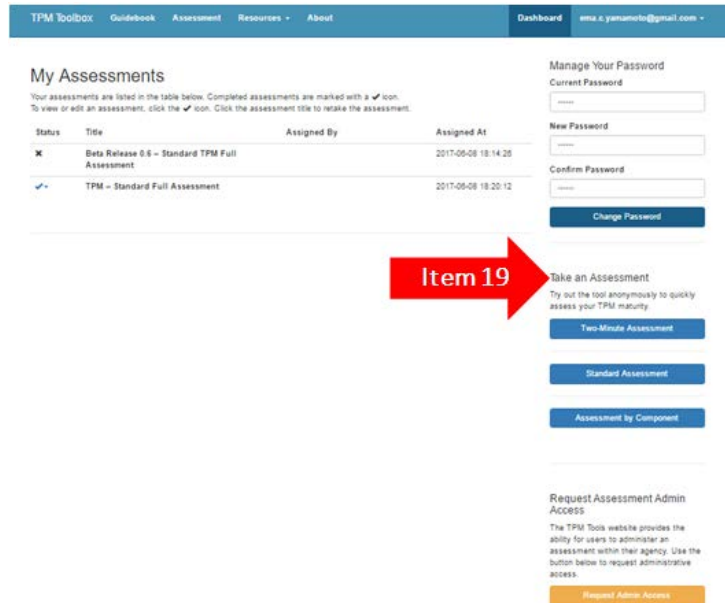


Figure 56: Assessment Dashboard Page- Buttons to Take Assessments Anonymously

ASSESSMENT ADMINISTRATORS

Administrators can request users within their agency to take an assessment, and results from various individuals can be aggregated for comparison purposes. Users must request approval from FHWA via the website. The requirement for approval is to ensure that TPM Tools Administrators can be aware of any new and additional assessments being implemented.

1. In order to become an Assessment Administrator, you must first have an account. Follow the instructions as specified under [Option 2: Account Required](#) to create an account and become familiar with the interface.
2. Request to be upgraded to an Assessment Administrator by navigating to the Dashboard page by selecting Dashboard from the upper right-hand corner. Then select Administer a TPM assessment from the right-hand menu.

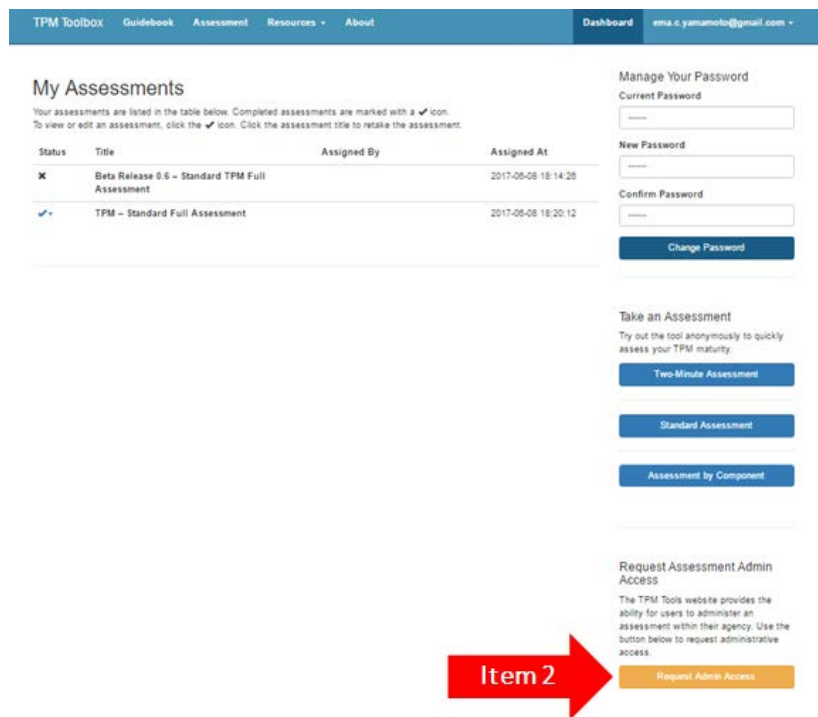


Figure 57: Assessments Dashboard Page- Request for Admin Access Button

3. Once you have requested to become an administrator, the following dialogue box will pop-up. Select "Request Assessment Admin Access". This will automatically notify the site administrator of your request. The site administrator will be in touch with you.

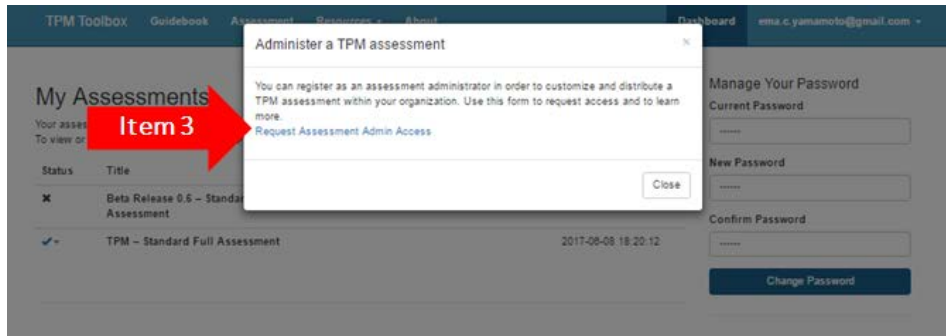


Figure 58: Option to Request Admin Access Option

4. Once approved, administrators will see additional menu options under the Actions dropdown on the assessment landing page. From the dashboard, click the assessment name. Then click “Actions” from the left-hand menu.

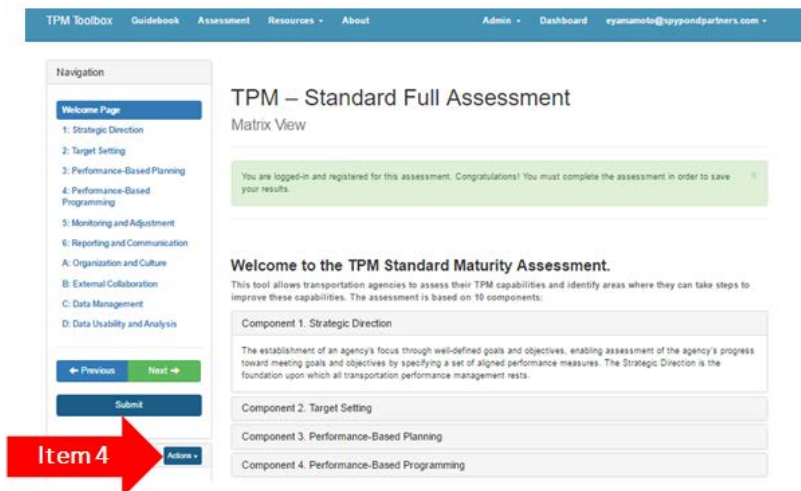


Figure 59: Standard Full Assessment Welcome Page- Actions Button

5. Once you have clicked “Actions”, the following additional options will appear:
 - a. Add/Manage Participants
 - b. Summary Report
 - c. Consensus Exercise
 - d. Fill Random
 - e. Make Public

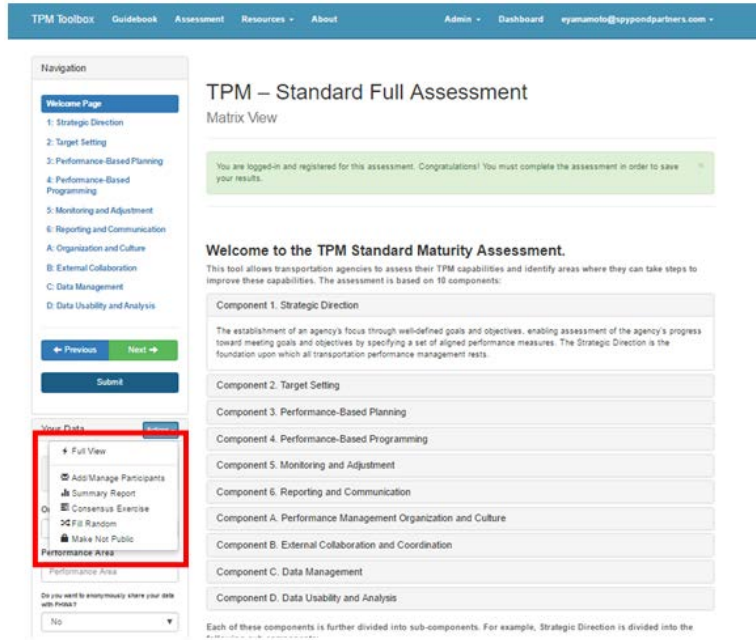


Figure 60: Standard Full Assessment Welcome Page- Options Under Action Button

- 6. Add/Manage Participants: allows you to invite and delete users.
 - a. Click “Add/Manage Participants”

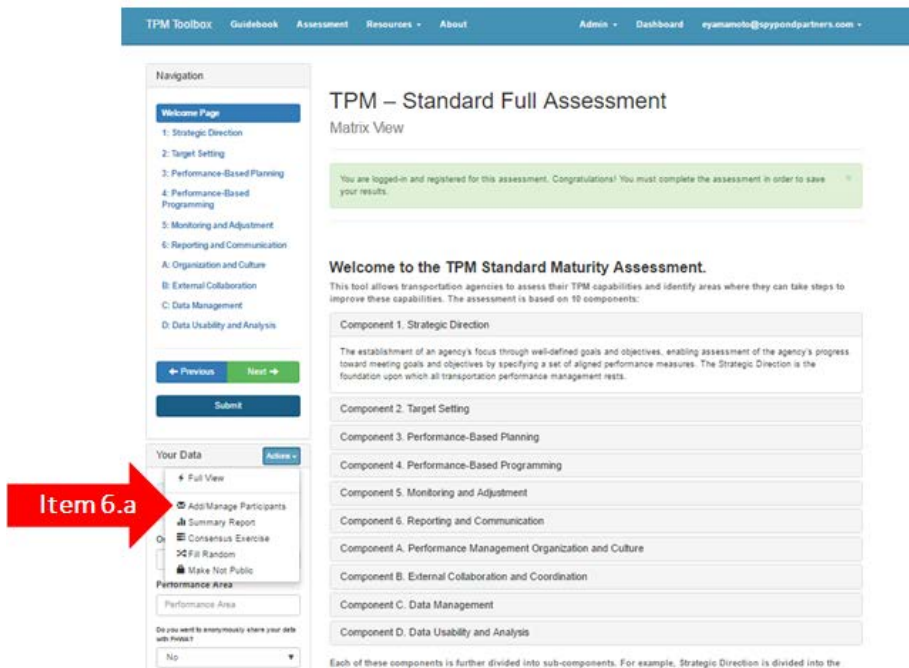


Figure 61: Standard Full Assessment Welcome Page- Add/ Manage Participants Option

- b. Fill in the boxes for First and Last Name and Email address of individuals you want to take the assessment.

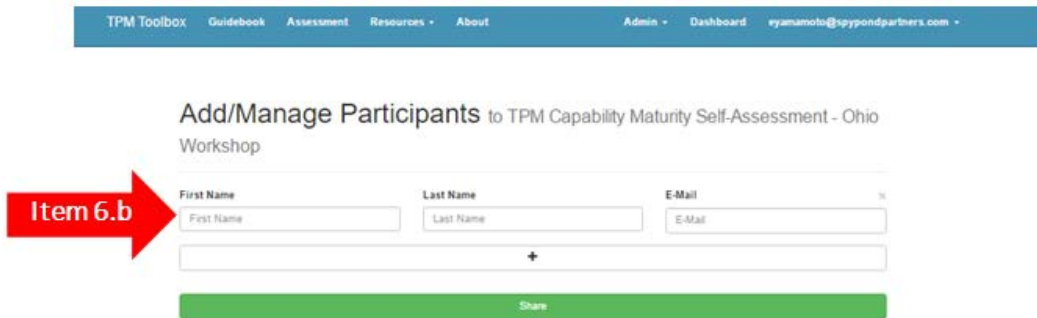


Figure 62: Add/ Manage Participants Page- Submitting Names

- c. To add more boxes, click the “+” button. Delete any lines of unused forms by clicking the small “x” to the right of the Email label.



Figure 63: Add/ Manage Participants Page- Add More Participants Button

- d. Once you have added all the participants that you would like, click “Share”. Confirm when prompted. An invitation will be sent to all the emails listed, addressed to their first name.

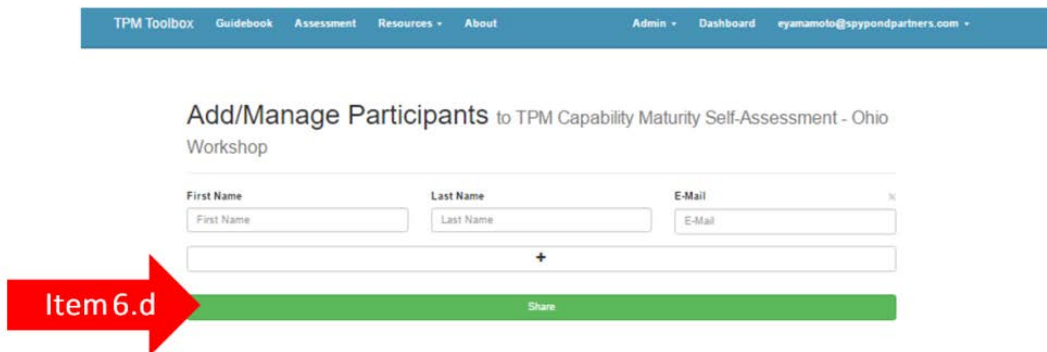


Figure 64: Add/ Manage Participants Page- Share Button

- i. If the individual already has an account, they will be asked to join the assessment you created.
 - ii. If they do not have an account, they will go through the steps described in [Option 2: Account Required](#) to create an account.
7. Back to the “Actions” menu, the next function is “Summary Report”. The “Summary Report” allows you to view results of the assessment across users.
- a. Click “Summary Report”.

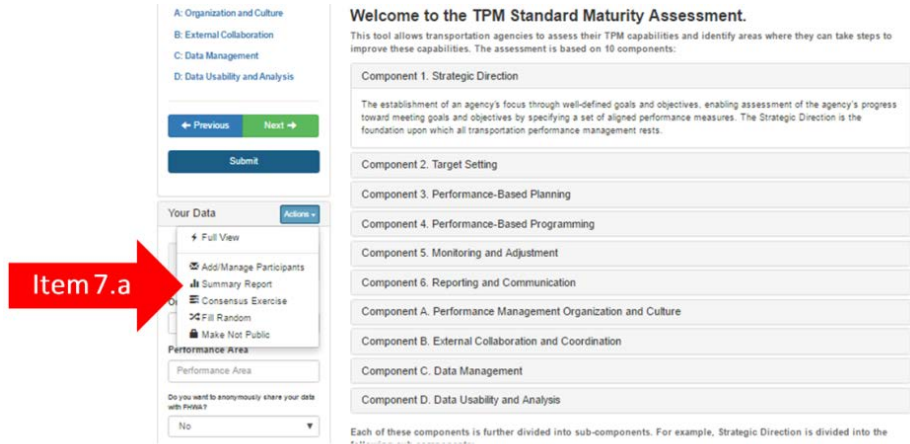


Figure 65: Standard Maturity Assessment Page- Summary Report Button

- b. Hover over the bar chart to show the range and median are shown for each component area.

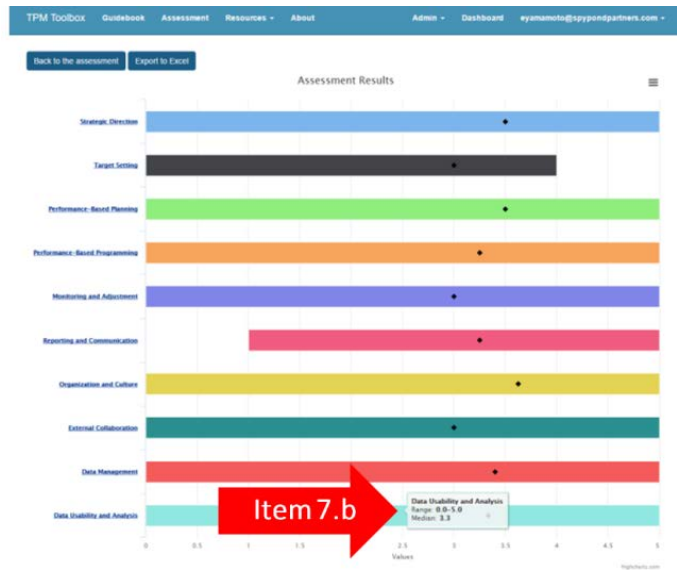


Figure 66: Summary Report Page- Range and Median Reports

- c. To print or save the current chart view at any time, click the menu button in the top right corner of the page.

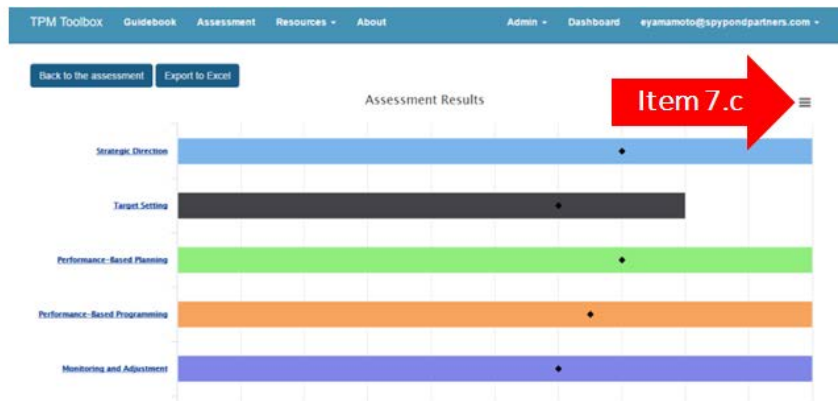


Figure 67: Summary Report Page- Menu Button

- d. Select from the image options to save the chart as an image, or select "Print Chart" to print the chart.

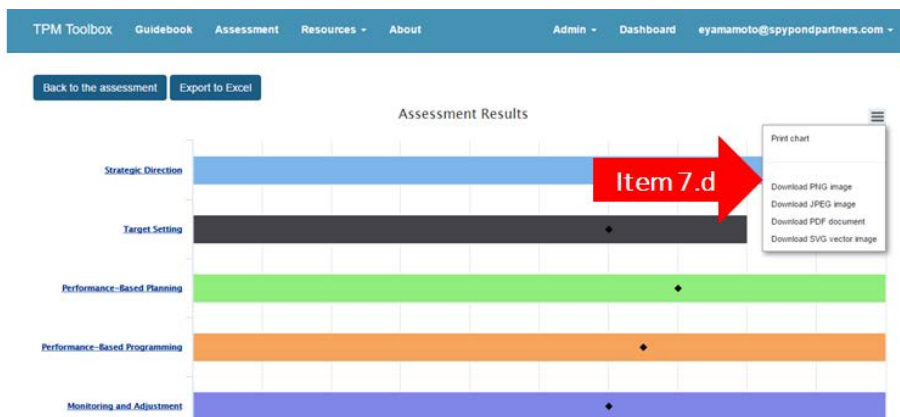


Figure 68: Summary Report Page- Option to Print Chart

- e. To export the data to Excel, click "Export to Excel" and save the file.

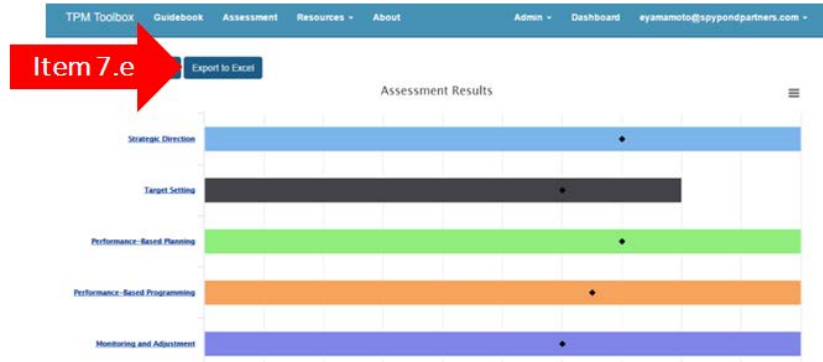


Figure 69: Summary Report Page- Export to Excel Option

- f. Navigate back to the assessment landing page by clicking the blue “Back” button at the top left.



Figure 70: Summary Report Page- Back Button

- g. For long assessments, drill down further by clicking the component names to view subcomponent results.

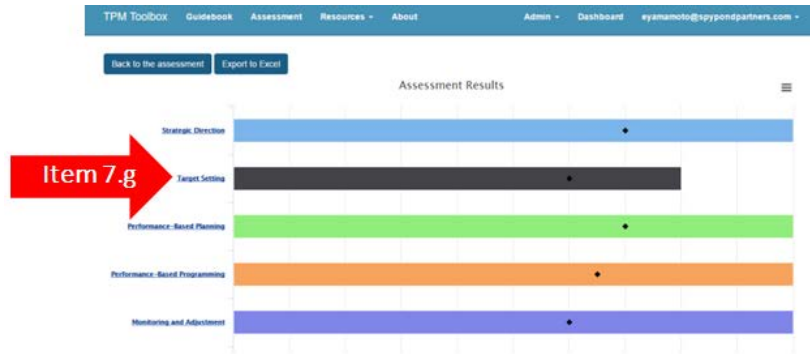


Figure 71: Summary Report Page- Option for Longer Assessment

- h. This chart has the results for the subcomponents of the selected component. This chart has many of the functions of the previous chart, including identifying the range and median of the subcomponent area, the ability to print and save the chart, and the ability to export the data to Excel.



Figure 72: Summary Report Page- Subcomponent Results

- i. Navigate back to the previous chart by clicking “Back to the aggregated data” button in the right-hand corner.

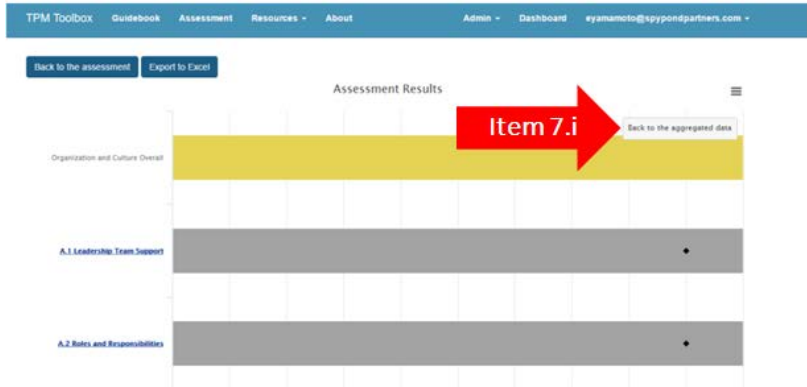


Figure 73: Summary Report Page- Going Back to Previous Chart

- j. To view individual registered user’s responses, click on the subcomponent area.

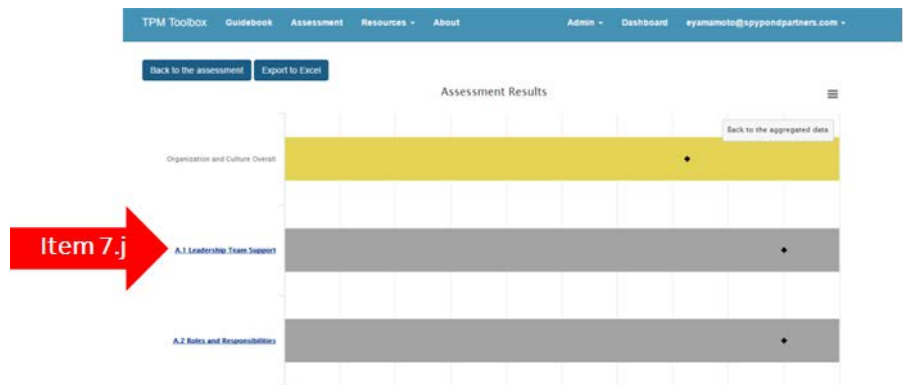


Figure 74: Summary Report Page- Individual Registered User’s Response

- 8. Back to the “Actions” menu, the next function is “Consensus Exercise”. This allows you to facilitate a discussion among gathered staff who have taken the assessment on their own. This tool serves as a way to come to a single assessed value for each component/subcomponent as an agency.
 - a. Click “Consensus Exercise”.

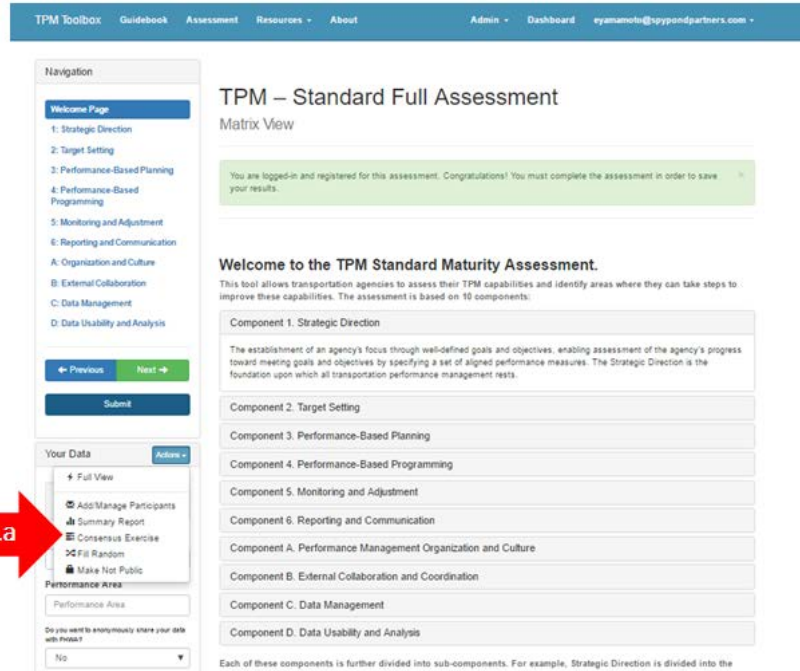


Figure 75: Standard Full Assessment Welcome Page- Consensus Exercise Button

- b. For the 2-minute assessment, slider bars are shown for the ten components, all on one page. For the standard full assessment (displayed here), each component is located on its own page, with slider bars for each subcomponent.

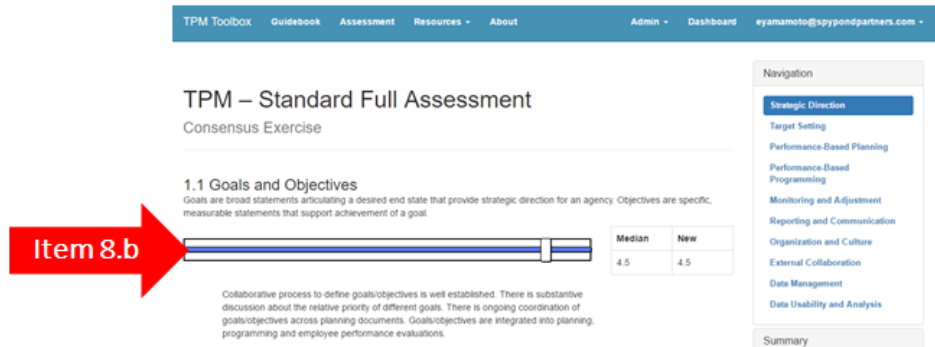


Figure 76: Standard Full Assessment Slide Bars

- c. Next to the slider bars, the median value of all respondents is shown. The new value to the right will display the value according to the placement of the slider bar.

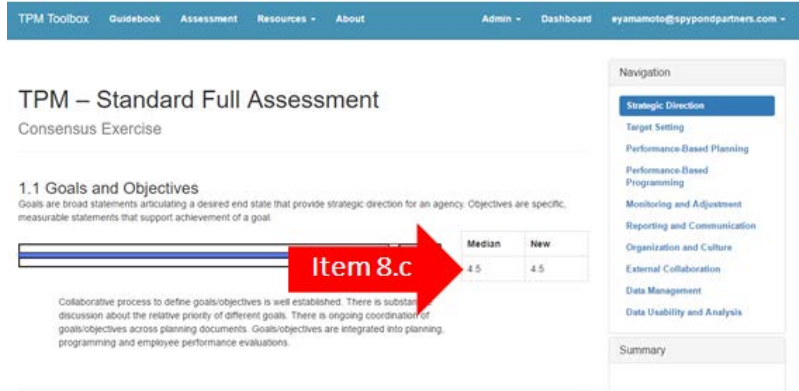


Figure 77: Standard Full Assessment- Median Value of Respondents

- d. The text under the slider bars will change as the slider is moved. The text is the maturity level description for the level (1-5) the slider is currently on.

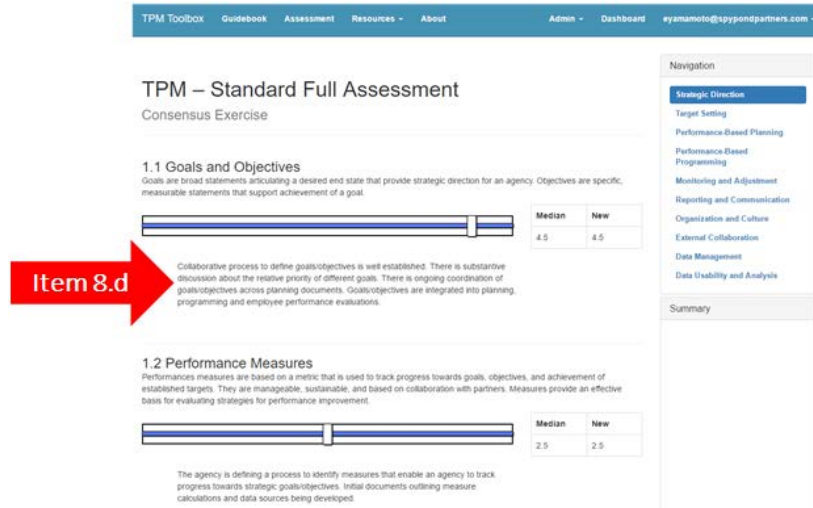


Figure 78: Standard Full Assessment- Maturity Level Descriptions

- e. The facilitator should move the sliders and bring the group to a consensus on a particular maturity level for each component/subcomponent based on the median and discussion among the group.

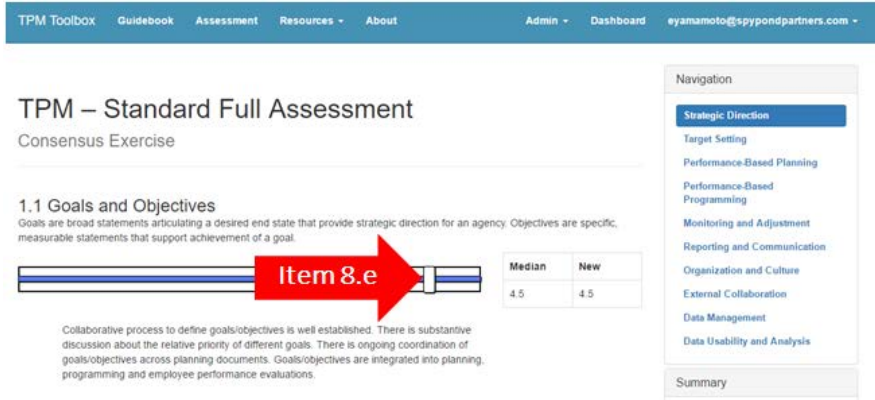


Figure 79: Standard Full Assessment- Sliders to Reveal Maturity Level

- f. For the standard full assessment displayed, click “Previous” and “Next” from the right-hand menu to move between components.

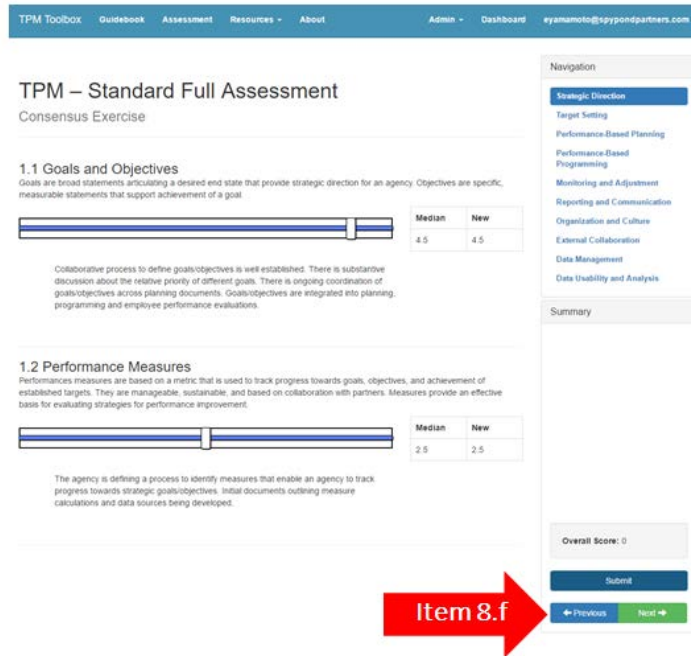


Figure 80: Standard Full Assessment- Options to Move between Components

- g. When finished, click “Submit”.

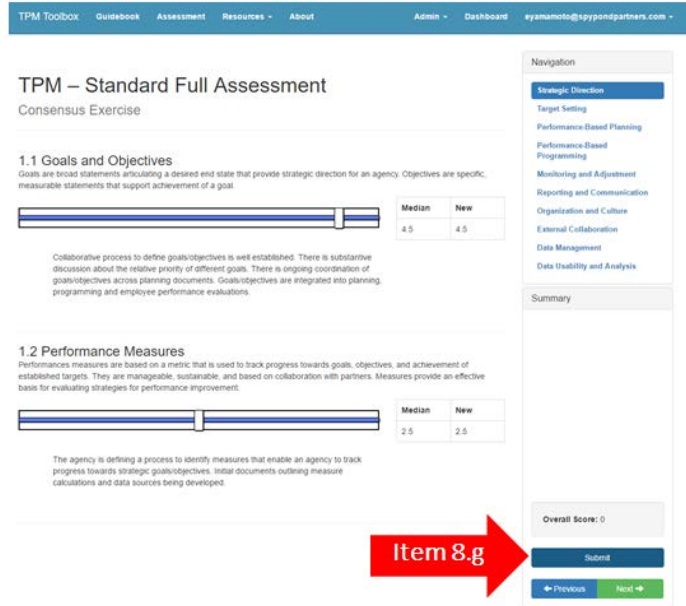


Figure 81: Standard Full Assessment- Submit Button

- h. You will receive confirmation that the results have been submitted by the green dialogue box at the top of the screen.

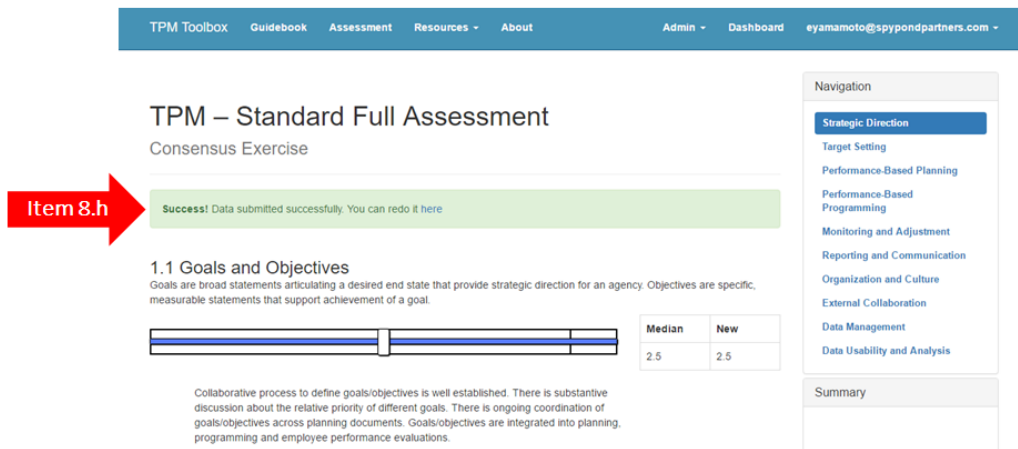


Figure 82: Standard Full Assessment- Confirmation of Submission

- 9. Back to the “Actions” menu, the next function is “Fill Random”. This allows you to fill random answers to complete the survey.
 - a. By clicking “Fill Random”, all component areas have a random answer assigned.
 - b. Edit by navigating through the assessment, or click “Submit” to review the survey results.

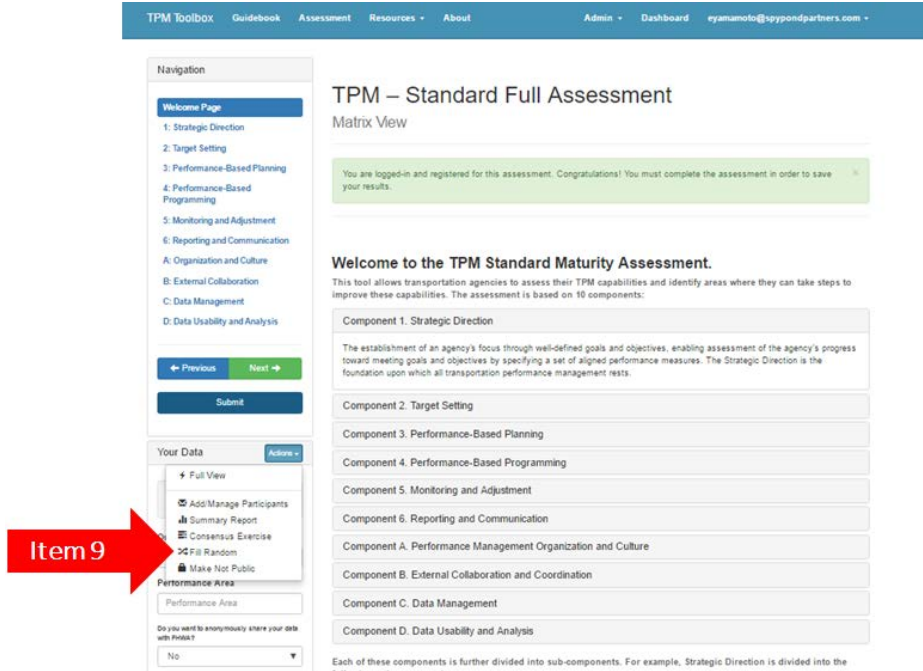


Figure 83: Standard Full Assessment Welcome Page- Fill Random Button

10. Back to the “Actions” menu, the next function is “Make Public/Not Public”. This allows you to disable the requirement that a user be logged into an account in order to view and/or complete a given assessment.
 - a. Click “Make Public/Not Public”.

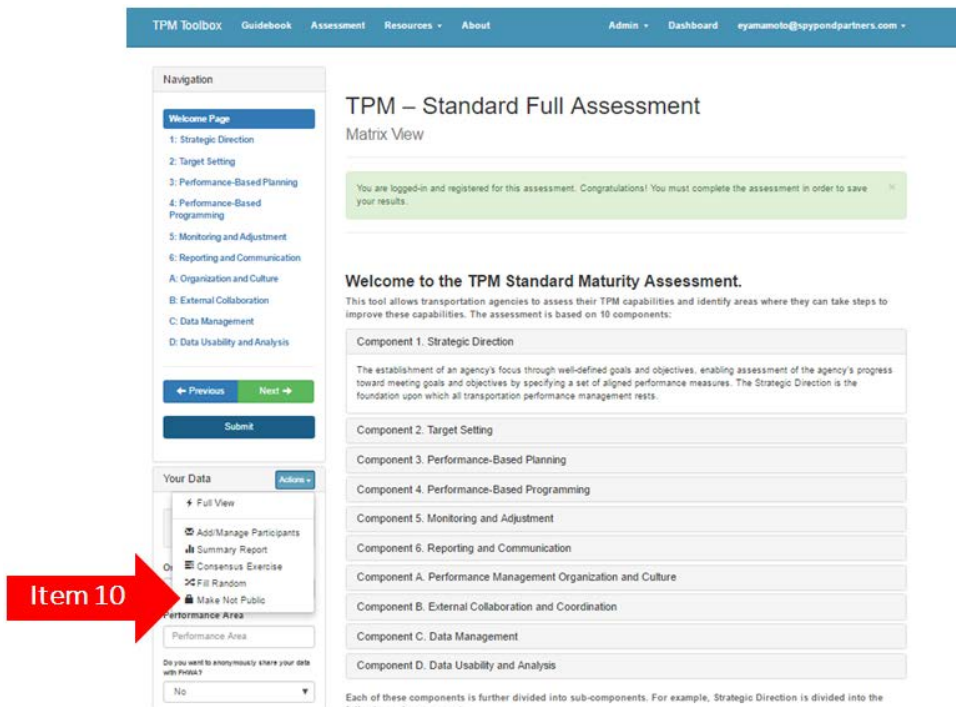


Figure 84: Standard Full Assessment Welcome Page- Make Not Public Button

- i. By toggling to Make Public, the assessment can be taken by anyone with the URL. That being said, results are unable to be saved unless a user has registered and logged in.
- ii. By toggling to Make Not Public, the assessment is only available to those who have been assigned to the assessment by the administrator. In addition, even if a user has the URL, they will be unable to access the assessment unless they are logged in.