SFMTA

Intelex Program Overview

March 2019

Presented by:

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Agenda

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- Scope
- Project Team
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Introduction

What is Intelex?

- Intelex is a hosted solution that provides a platform for developing forms, workflows, and reporting.
- Intelex specializes in Environment, Health, Safety, and Quality (EHSQ) applications.
- Intelex is used by more than 1,300 clients and 1.6 million users worldwide.
- Intelex replaces TransitSafe as SFMTA's safety database.

Background

What's the business driver?

- Strategic plan to adopt enterprise-wide software solution that provides a common platform to accurately collect, track, analyze, and report the full life cycle of SFMTA Incident information in a timely manner
- Streamline existing safety management processes into one safety management system.
- Agency-wide initiative to go paperless
- Improve information accuracy on records logged and to reduce time to report incidents in the safety management system
- Ability to report and make good business decisions based on information in the safety management system
- To establish, standardize, and improve the business rules, methodology, and overall efficiency of the existing SFMTA Incident process management system.
- Current version of the legacy system TransitSafe is no longer supported
- Regulatory requirements by FTA for SMS and CPUC/NTD for reporting

Scope

- SFMTA deployment of the Intelex solution includes 5 modules
  - ✓ Audits
  - ✓ Hazards
  - ✓ Non-Conformance
  - ✓ Training Management
  - ✓ Incident Management
- 4 of the 5 modules are currently are in LIVE in Production
- Incident Management is scheduled to go live Dec 2019
  - ✓ OrbCAD system integration
  - ✓ DocuSign system integration
  - ✓ Data Warehouse integration

Project Team

Steering Committee

Team Member	Project Role
Melvyn Henry	Executive Sponsor (System Safety)
Lisa Walton	Executive Sponsor (IT)
Art Wong	Project Director

Project Team (IT)

Team Member	Project Role
Cindy Nguyen	Project Manager
Eugene Tom	Technical Lead
Rachele Schainker	Business Systems Analyst
Robert Miller	Data Migration Analyst

Project Team (cont'd)

Project Team (Business Units)

Team Member	Project Role
Michael Kirchanski	SME (System Safety)
Aaron Lampkin	Business Analyst (System Safety)
Oliver Gajda	SME (Transit)
Travis Richards	Business Analyst (Transit)

Additional IT Project Resource Team

Team Member	Project Role
Cheong-Tseng	Data Warehouse Lead
Donovan Corliss	System Integration Developer Lead
Jason Merman	System Integration Developer

Stakeholders

BUSINESS UNITS

- City Attorney's Office (CAO)
- System Safety
- Industrial Safety
- Security
- Transit (Operations & Maintenance)
- Human Resources (Ops Training & Substance Abuse)
- Any SFMTA staff operating an SFMTA vehicle

Systems Overview

Hazards Management	Non-Conformance	Audit Management	Training Management	Incident Management
Anonymous Hazard Form	Non-Conformance Form	Audit Types	Courses	Various Incident Forms
Hazard Investigation	Corrective Actions	Checklists	Training Requirements	Cause Analysis
Corrective Actions		Findings	Sessions	Determination
		Corrective Actions	Training Records	Corrective Actions

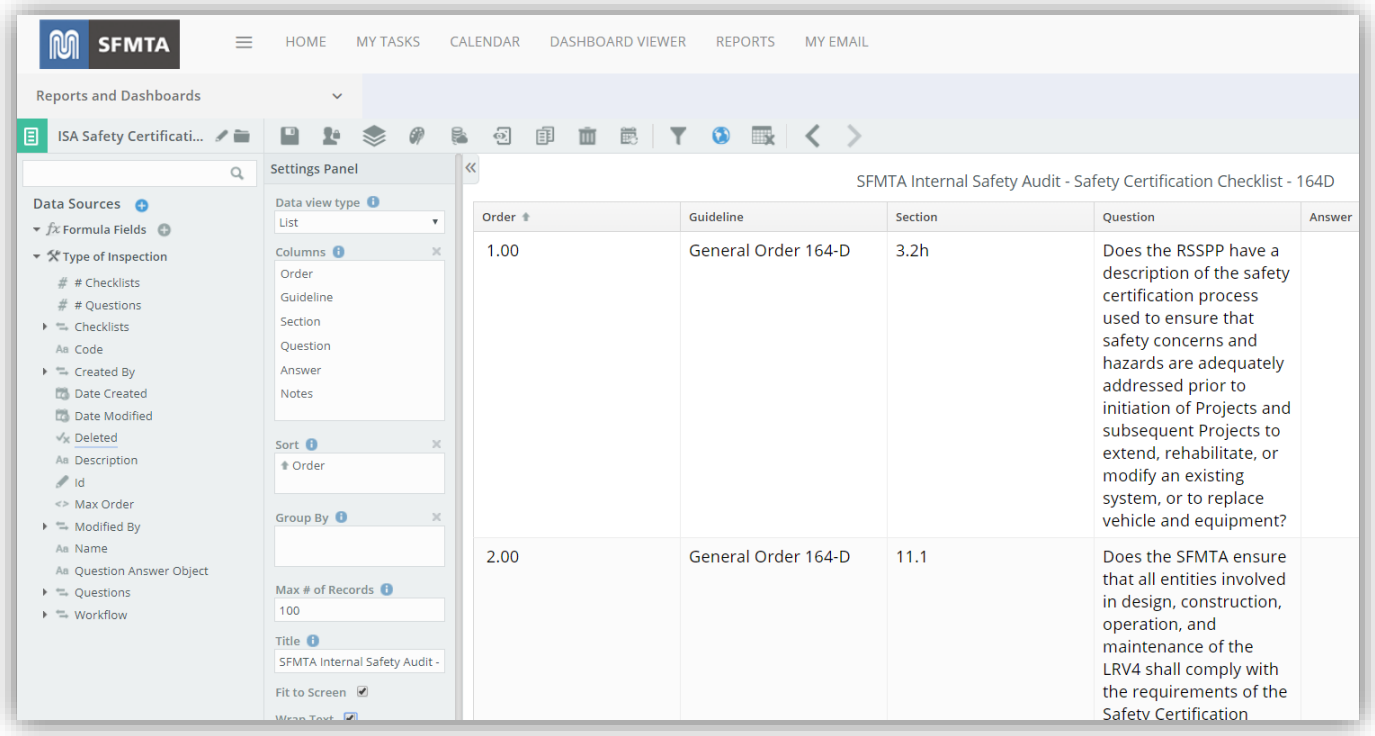
Intelex Platform Features
Workflow Tasks and Notifications
Application Builder
Business Intelligence Tool
Data Import Tool
API Tool

Intelex Features

- **Single Sign-On** – Credentials are passed through so users only need to authenticate once and manage a single password.
- **Scheduled Data Imports** – Data supplied by SFMTA systems can be easily imported by Intelex on a regular basis (e.g. Employees and Vehicles).
- **API Integrations**
  - OrbCAD Objective Data – Basic information for all safety related incidents will help pre-populate incident forms.
  - Collision/Service Interruption Form – Incident form completed in OrbCAD will be made available in Intelex for reference and reports.
  - DocuSign – Incident forms will be digitally signed.
  - Data Warehousing – Data from Intelex will be brought back into SFMTA for more expanded analysis.
- **Application Builder Tool** – Intelex is an extensible framework so we can modify existing forms/workflows and build new ones without vendor assistance.

Intelex Features Cont'd

- **Self-Service** – All SFMTA employees will be able to logon to Intelex and view their own incident and training histories.
- **Reports and Dashboards** – Intelex has a built-in BI tool which will allow analysts to build on-demand reports that can be shared or exported. Intelex also has OData capability for connecting external reporting tools.

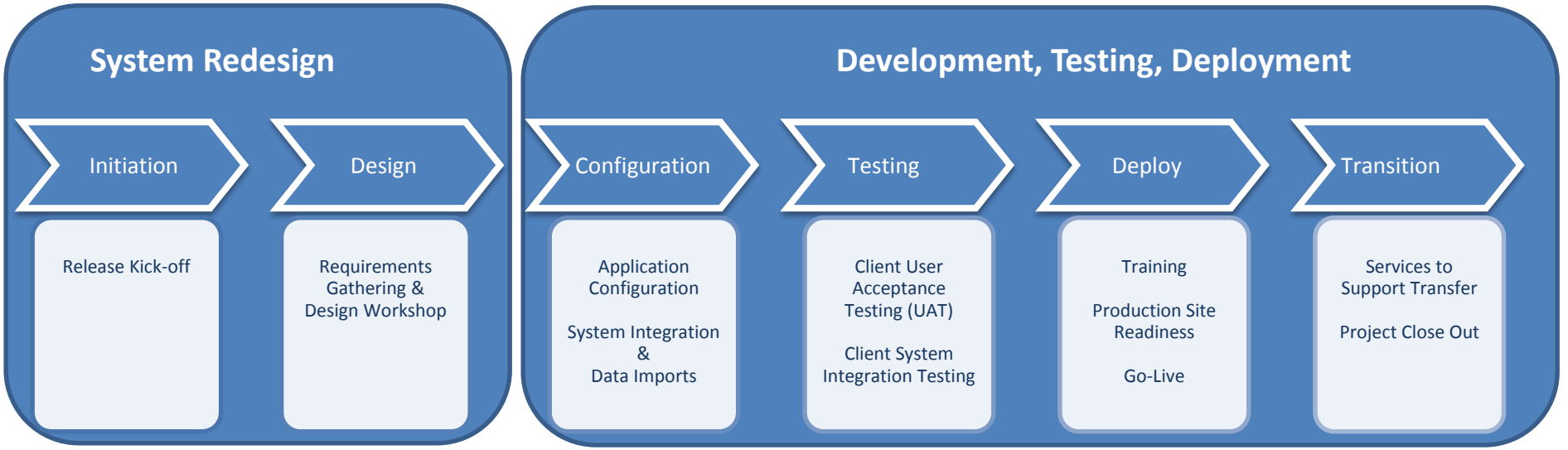


Intelex Improvements

- **Accuracy** – Intelex offers more control to ensure accurate data is entered into forms.
- **Availability** – TransitSafe only works on IE. Intelex works on any browser.
- **Centralization** – Intelex incorporates more Transit units such as Station Agents, Maintenance, and TMC who previously kept separate records.
- **Expansion** – Intelex is not just for Transit.
    - Any SFMTA employee can fill out an incident form if involved in a "non-revenue" accident.
    - Any SFMTA employee can anonymously report a Hazard in Intelex.
    - Any SFMTA trainer can manage training records in Intelex.
- **Extensibility** – TransitSafe is not easily configurable to accommodate changing business requirements. Intelex is more easily changed.
- **Workflow** – Tasks are clearly defined and assigned. Triggers can be set for reminders and escalation. TransitSafe has no workflows.

Delivery Approach

Implementation Methodology



Deployment Schedule

Activity	Feb 2019	Mar 2019	Apr 2019	May 2019	Jun 2019	July2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019	Jan - Dec 2020
Contract Amendment IV Update	ILX & SFMTA											
MAJOR MILESTONE			APPLICATION CONFIGURATION OVERVIEW									
ILX Application Configuration			ILX									
SFMTA OrbCAD & Controller Form Design & Build			SFMTA (IT)									
SFMTA DocuSign Design & Build			SFMTA (IT)									
Develop UAT Test Cases				SFMTA (IT & SME)	SFMTA (IT, SME & Transit)							
MAJOR MILESTONE							FINAL APPLICATION WALKTHROUGH					
System Integration Testing								ILX & SFMTA (IT)				
UAT - Cycle 1 Testing								SFMTA				
UAT - Cycle 2 Retesting									SFMTA (IT, SME, Transit)			
UAT - Cycle 3 Final Review/Sign-off									SFMTA (IT, SME, Transit)			
MAJOR MILESTONE										CODE FREEZE		
TRAINING - Group 1*										SFMTA (IT, SME & Transit)		
Data Imports										SFMTA (IT & SME)		
Go-Live: DEPLOY - **GROUP 1**											SFMTA (All except Operators Division 2 -8)	
Division 2 - 8 (TBD)												SFMTA (Operators 2 -8)
Non-Revenue Vehicles (TBD)												SFMTA (Other Divisions)
Scott (TBD)												SFMTA (Other Divisions)

*GROUP 1 consists of:
- Islais Creek - Operators & Maintenance Supervisors
- Inspectors, Station Agents, Supervisors/Dispatchers
- System Safety, Industrial Safety, Security, HR/Training

Thank you for you time……