



Capital Planning Tool (CPT)

Administrative User

User Guide

prepared for

**Pennsylvania Department of Transportation (PennDOT)—Bureau of
Public Transportation (BPT)**

prepared by

Cambridge Systematics, Inc.

user guide

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1.0 Welcome!

The PennDOT Capital Planning Tool (CPT) is an asset management system designed to support the needs of PennDOT's Bureau of Public Transportation (BPT) and the many transit agencies that operate in the Commonwealth. The system manages assets of all types, including revenue vehicles, equipment, facilities, and infrastructure. The system stores crucial information about every asset category and maintains a complete history of the asset as it ages, including; changes in condition, usage, value/depreciation, and other lifecycle events are, that are recorded and can be reviewed at any time. A variety of reports can be generated on asset condition, value, and capital replacement needs.

CPT is based on TransAM, an open-source asset management platform developed by Cambridge Systematics. TransAM focuses on transit assets and project planning, and is designed to make it easier for State DOTs, Planning Agencies, and Transit Agencies to share and exchange information related to assets, projects, and funding.

1.1 Initial Log In and Password Reset

If this is your first time logging in, you should receive an email following the creation of your user account, with a link instructing you to reset your password. Click the link in the email and you will be directed to enter your email address in order to reset your password; enter your email address and click the “Send me reset password instructions” button. If you are an existing user and you forgot your password, you will be taken to the same screen by clicking on the “Forgot Your Password” link on the login page.

Figure 1 Password Reset Request Screen

The screenshot shows a web form for password reset. On the left, there is a sidebar with instructions: "Enter your email address that you use to login to TransAM and click the button. If your email address is found in the system you will get an email with instructions for resetting your password. If you don't receive an email in a few minutes contact your program manager." On the right, there is a main form area with a search bar labeled "Forgotten Password" and a field labeled "Email". Below the email field is a blue button labeled "Send me reset password instructions". An orange arrow points from the text in the sidebar to the "Email" input field. A callout box with an orange border contains the text: "The email address you enter, must match the email address entered when your account was established".

Once you receive your “Reset Password Instructions” email, click on the “Change my password” link within the email, you will be redirected to the system site in your web browser, and you will be prompted to enter your new password twice. Once you enter your password twice, if it meets the password requirements, you will be automatically logged in.

Figure 2 Set/Reset Password Screen

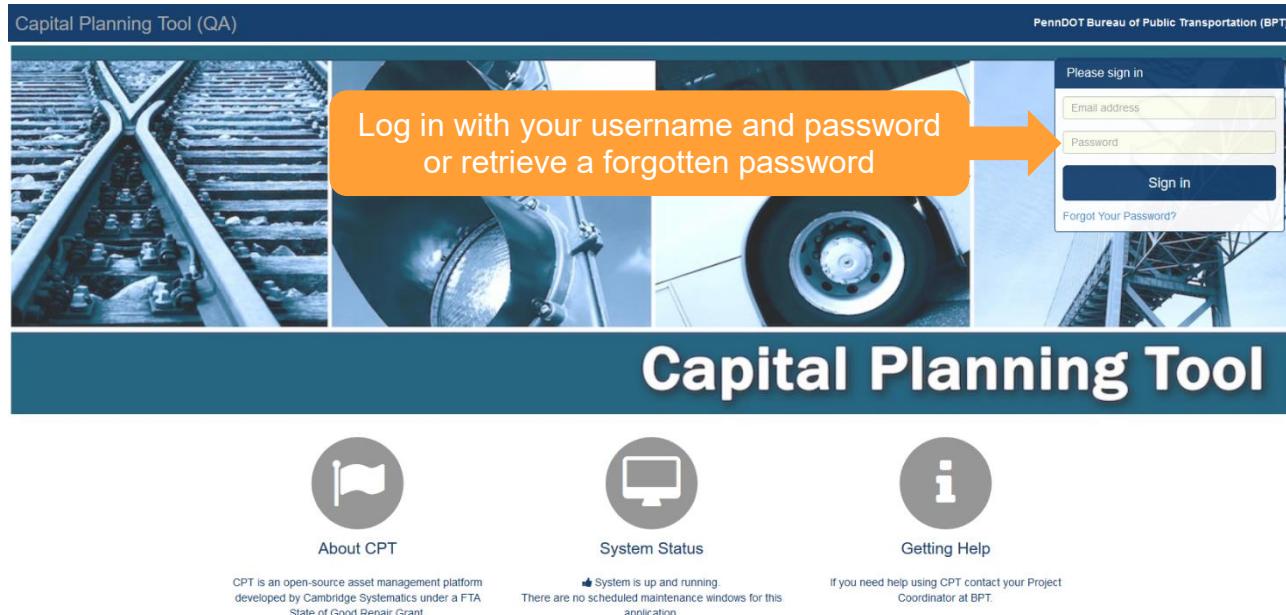
The screenshot shows a web form for changing a password. On the left, there is a sidebar with instructions: "Your password must conform to the following: At least 8 characters, Contain at least one upper case and one lower case letter, Contain at least one number". On the right, there is a main form area with a search bar labeled "Change Your Password" and two input fields labeled "New password" and "Confirm your new password". Below these fields is a blue button labeled "Change my password".

1.2 Ongoing Site Access

The system can be accessed via the following URL: <https://pa-cpt.camsys-apps.com>.

Ongoing access can be obtained by bookmarking the site URL in your web browser and clicking on the link, upon which you'll be greeted with a login screen. Enter your credentials in the appropriate fields to login. You also can request a password reset by pressing the "Forgot Your Password?" button.

Figure 3 Login Screen



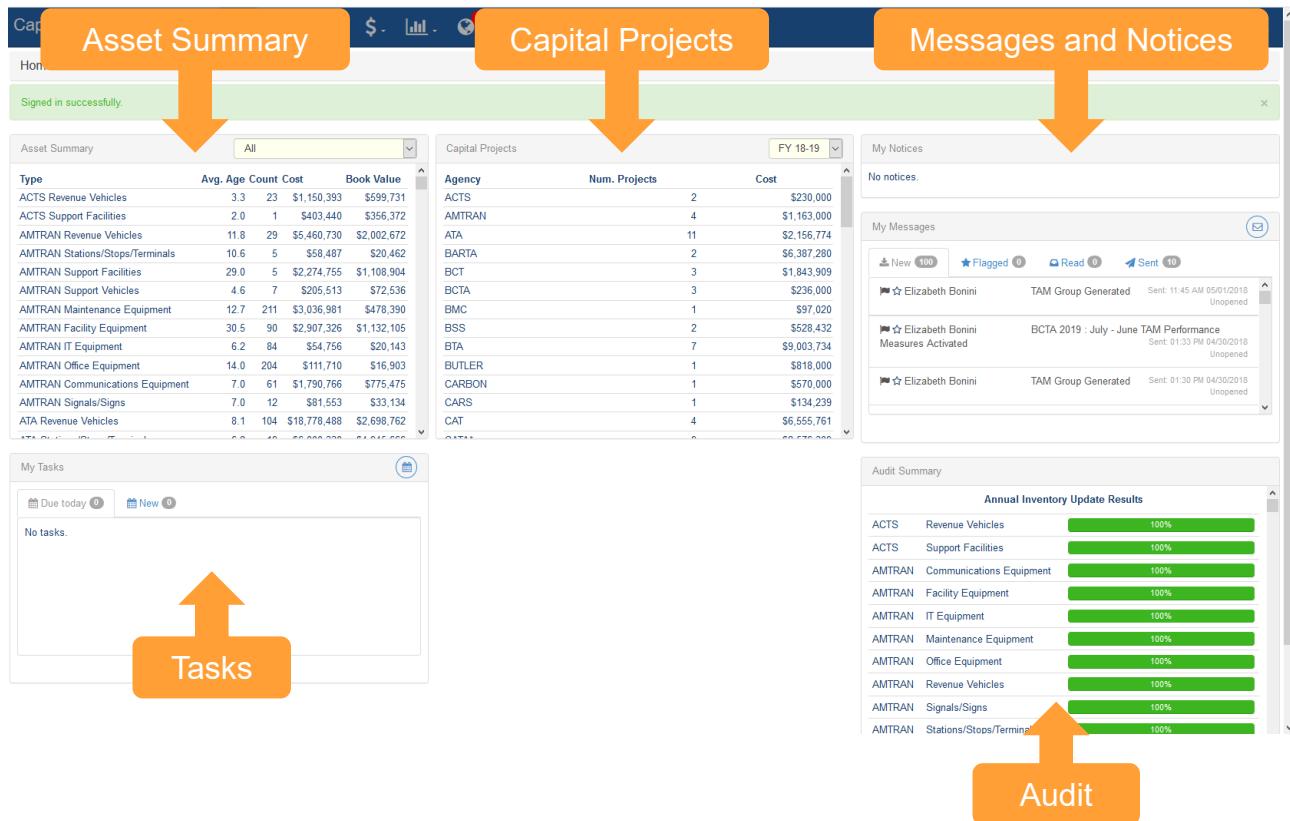
2.0 Dashboard

2.1 Dashboard Elements

Once you're logged in, your first experience will be the dashboard. The dashboard has a variety of elements.

The dashboard widgets highlighted below are: Asset Summary, Capital Projects, My Notices, My Messages, My Tasks, and Audit Summary. These provide a quick glance at the contents within the system.

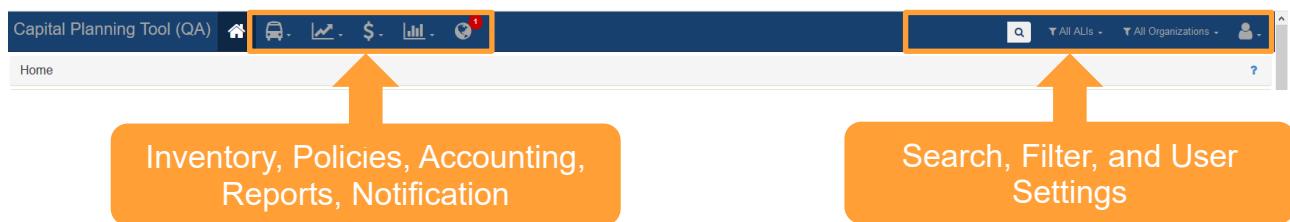
Figure 4 Dashboard Elements



2.2 Header Menu and Controls

The menu icons at the top guide you to the deeper content pages within the system: Inventory, Policies, Accounting, Reports, and Notifications. There also are controls to search, filter Activity Line Items (ALI) or organizations, and user settings.

Figure 5 Header Menu



3.0 General Features and Tools

As you progress through the system, there are some common interface elements that you'll encounter often.

3.1 Table Controls

There are lots of tables inside the system. The tables have common control tools that allow you to manipulate the table contents and export the table.

On header elements, you'll notice two arrows to the right of each column. These controls sort the table ascending or descending based on this column.

Figure 6 Sorting Controls



The Export All button to the top right of the table exports all table elements into an Excel table.

Figure 7 Export Button



There also are a set of tools to the top right of the table. The left button either displays the table with pagination (e.g., the table shows only a configurable number of rows per page), or the entire table.

The center button allows the user to show or hide different columns. Check marks next to the column indicate if a column will be shown and allow the user to toggle the column on or off.

The right button exports the current table view (complete with filters and excluding hidden elements) into a.CSV,.TXT, or an.XLSX (Excel) file format.

Figure 8 Table Tools



3.2 Site Filters

Throughout the site, there are various opportunities to filter data. When you see the following icon it means you can pare down displayed data with a filter.

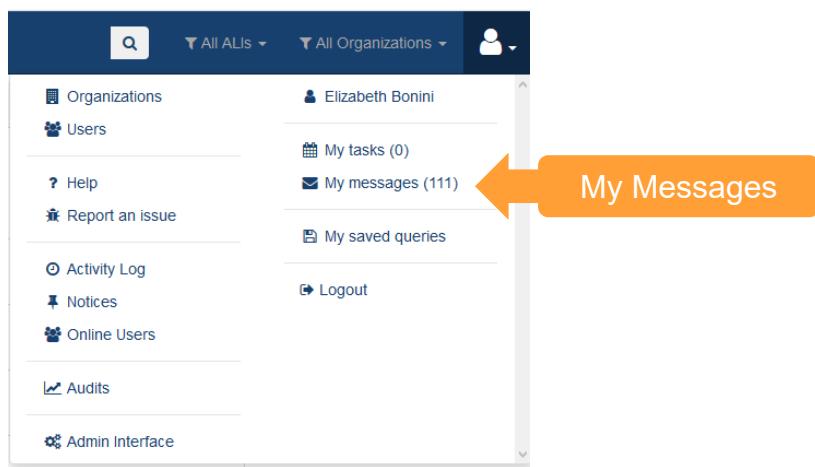
Figure 9 Filter Icon



3.3 Messages

You can access Messages through the User Profile drop down menu.

**Figure 10 User Profile
Messages**



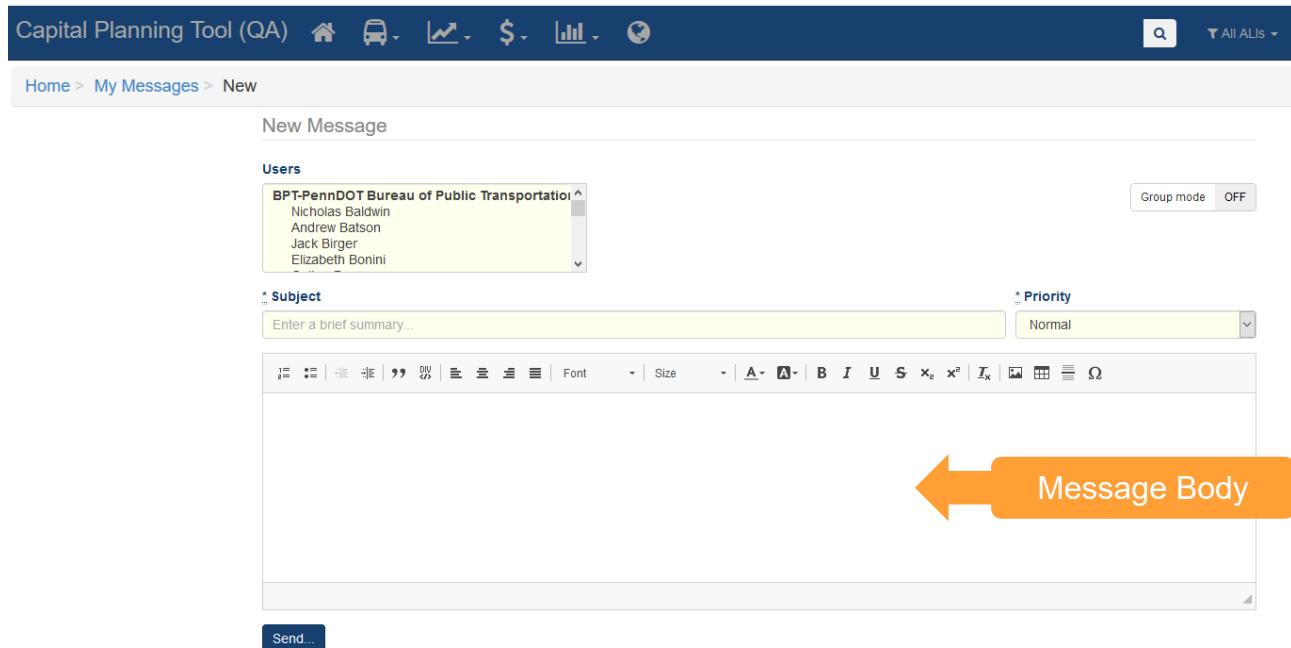
Users are able to send and receive messages to one or more users through the interface.

Figure 11 Messages

The screenshot shows the 'My Messages' page from the Capital Planning Tool (QA). At the top, there's a navigation bar with icons for Home, Bus, Chart, Dollar, Bar, and a search bar. Below that is a breadcrumb trail: 'Home > My Messages'. The main area has a toolbar with 'Refresh' and 'Compose' buttons. Below the toolbar is a summary bar with 'New 111', 'Flagged 0', 'Inbox 0', and 'Sent 0'. The main content area displays three messages from 'system user' to the user, all titled 'User account locked'. The first message was sent at 01:51 PM on 08/17/2018 and is marked as 'Unopened'. The second message was sent at 12:22 PM on 07/15/2018 and is also 'Unopened'. The third message was sent at 11:21 AM on 07/15/2018 and is also 'Unopened'. Each message row includes the recipient, subject, and send date/time.

Recipient	Subject	Sent
system user	User account locked	08/17/2018 Unopened
system user	User account locked	07/15/2018 Unopened
system user	User account locked	07/15/2018 Unopened

Selecting Compose will allow you to create a new message. Recipients options will be a list of users in your organization. You can enter the Subject and choose Low, Normal, or High Priority for the message. Type the intended message into the Message Body and press “Send...” when complete.

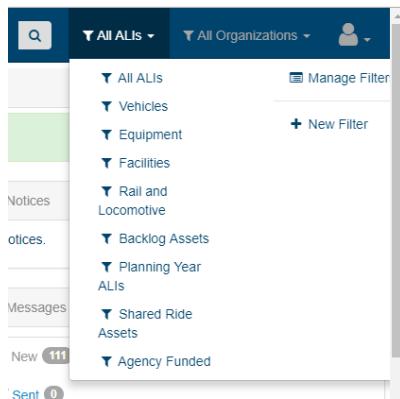
Figure 12 Message Interface

3.4 Activity Line Item (ALI) Filter

The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

Figure 13 ALI Filter

You can filter with prepopulated selections or create your own filters.

Figure 14 ALI Filters

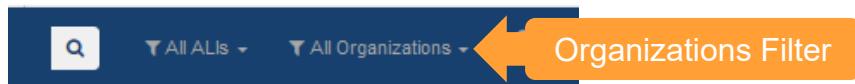
To create a new filter, select "New Filter" and specify the details required.

Figure 15 New ALI Filter

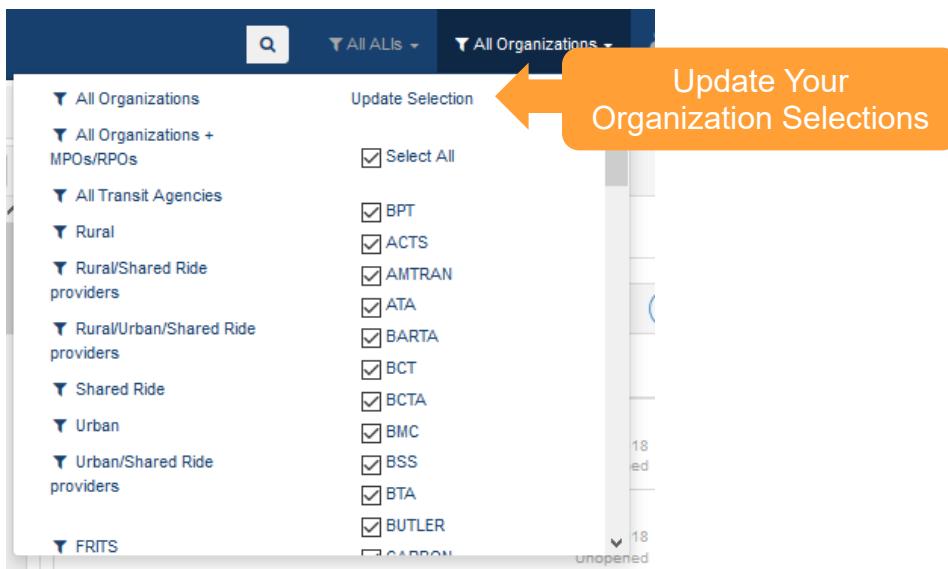
The screenshot shows the 'New ALI Filter' interface. On the left, there's a sidebar with 'Home > ALI Filters > New'. The main area has two columns: 'Details' and 'Parameters'. The 'Details' column contains fields for 'Name' (with placeholder 'Enter a name for this filter'), 'Description' (with placeholder 'Enter a description for this filter'), and 'Shared With' (radio buttons for 'No One', 'BPT', and 'All Organizations'). The 'Parameters' column contains dropdowns for 'Type' (placeholder 'Enter a type for this filter'), 'SOGR' (set to 'All'), 'Scope' (placeholder 'Enter a scope for this filter'), 'Project Location' (placeholder 'Enter a project location for this filter'), 'Asset Type' (placeholder 'Enter an asset type for this filter'), 'Asset Subtype' (placeholder 'Enter an asset subtype for this filter'), 'Owner' (placeholder 'Enter an owner for this filter'), 'Funding' (placeholder 'Enter a funding source for this filter'), and checkboxes for 'In Backlog' and 'Not fully funded'. At the bottom are two buttons: 'Update ALI Filter' and 'Update and Select This Filter'.

3.5 Organizations Filter

If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

Figure 16 Organization Filter

After you select the organizations you desire, make sure to click Update Selection at the top of the dropdown menu.

Figure 17 Organization Filter Selections

3.6 Search

The system includes a sitewide search feature. It can be found in the top center-right of each page. Click the magnifying glass icon and enter keywords to search sitewide for content.

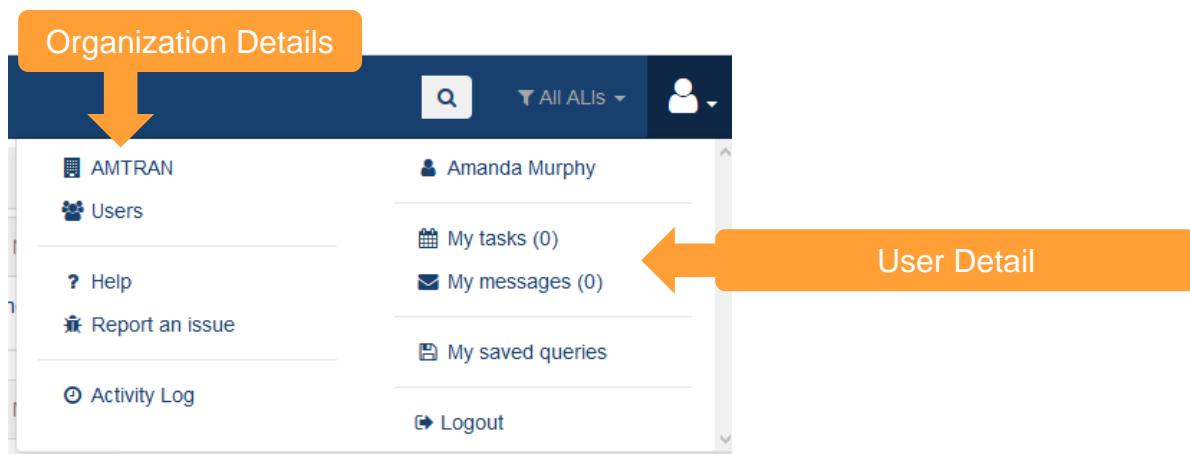
Figure 18 Search Box

3.7 User and Organization Options

Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

Figure 19 User Menu

From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

Figure 20 User Menu Dropdown

Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

Figure 21 Organization Details

Type	Count	%
Bus Std 35 FT	21	3%
Bus 30 FT	11	1%
Bus < 30 FT	2	0%
Intermodal Terminal	3	0%
Parking Lot	2	0%
Bus Maintenance Facility	3	0%
Other Support Facility	2	0%
Van	1	0%
Sedan/Station Wagon	4	0%
Pickup Truck	2	0%

If you click your own name, you can see details about your profile and edit them. You also can assign yourself a task to complete.

Figure 22 Profile Details

Home > Users > My Profile

Amanda Murphy

Actions

- Assign myself a task
- Update my profile picture
- Update my settings
- Update my profile
- Change my password

Corporate System Settings

Organization: AMTRAN
Address: 3301 Fifth Avenue
Altoona, PA, 16601-1801
Phone: (999) 999-9999

Email: amandamurphy@amtran.org
Primary Phone: 999-9999
Address: PA
Role: Agency Manager
Privileges:

You can browse this help document or submit an issue in the Help and Report an issue section. Reporting an issue is easy—just fill out the required information with as much detail as you can provide.

Figure 23 Report an Issue

Report an Issue

Use this form to make comments, suggestions for enhancement, or report any issues you may be having with CPT. For example,

- Make a suggestion about how we can make CPT better
- Report a bug that you are experiencing
- Suggest future enhancements that we could make

To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

Any information provided will be reviewed by a product manager and someone may get in touch with you to discuss your comments.

* Issue Type

* Web Browser Type

* Comments

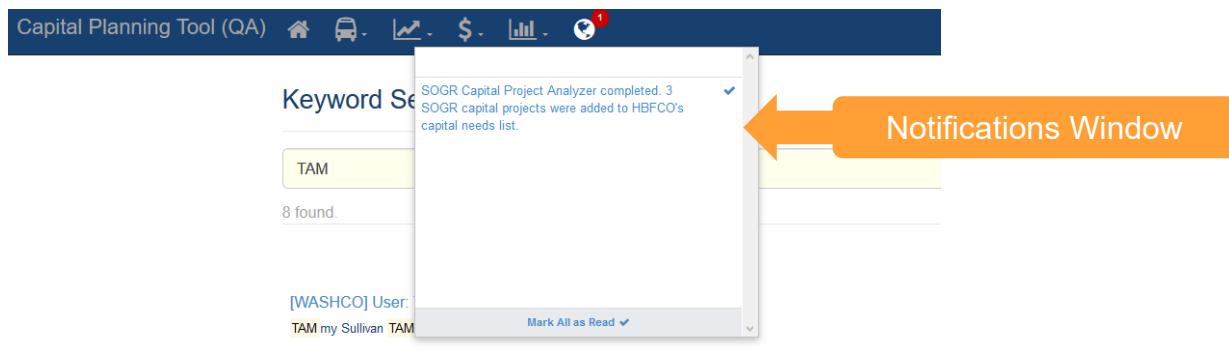
Please provide as much detail as you can...

Create Issue

3.8 Notifications

The notifications dropdown alerts you when there's activity in the system that you should be aware of. The globe at the top of the page will display a number with the count of "unread" notifications since your last check. Clicking on a notification item will take you to the change and mark the notification as read. You also can click individual checkmarks to dismiss individual notifications or "Mark All as Read" to quickly dismiss all notifications.

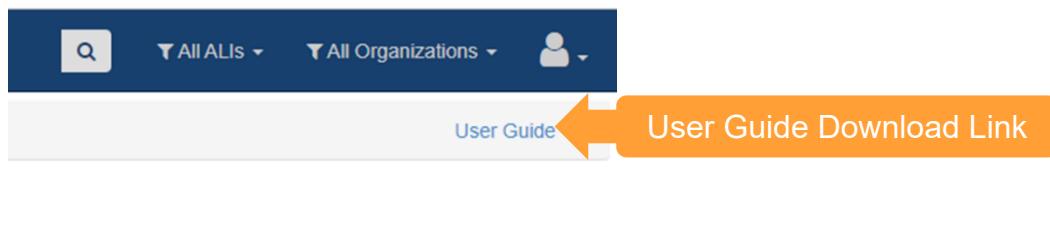
Figure 24 Notification Drawer



3.9 Help

At the top right of each page is a 'User Guide' link. Clicking the user guide icon will automatically download the user guide in .pdf format.

Figure 25 User Guide



4.0 Asset Inventory

Management of organization assets is carried out through the Asset Inventory dropdown menu. It contains a variety of tools and functions that streamline asset management.

Figure 26 Asset Inventory Dropdown

The screenshot shows the Capital Planning Tool (Staging) interface. A large orange callout box highlights the "Asset Inventory Dropdown" menu. This menu is a dropdown list containing several items: Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Query, Map, Manage Overlay Services, Add Asset, and Bulk Updates. To the right of the dropdown, there is a sidebar titled "Capital Project" and another sidebar titled "Agency" which lists various organizations like ACTS, AMTRAN, ATA, BCTA, BARTA, BSS, BMC, BCT, BUTLER, BTA, CARS, CCTA, CARBON, CATA*, CNTRCO, WASH, CLARCO, CTDC, and COITS.

4.1 Add an Asset

Adding new assets to the asset inventory is simple. First select “Add Asset” from the Asset Inventory dropdown.

Figure 27 Adding an Asset

This screenshot is similar to Figure 26, showing the Capital Planning Tool (Staging) interface. An orange callout box highlights the "Add an Asset" button, which is located in the main content area below the Asset Inventory dropdown. The rest of the interface, including the dropdown menu and the sidebar, is identical to Figure 26.

Select an Organization and an Asset Class, then click “Create New Asset.”

Figure 28 Select the Organization and Asset Class

Capital Planning Tool (QA)

Home > Add Asset

New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

You'll then be directed to fill out all required fields, as depicted on the required tab, and the option of filling out any optional fields on the recommended tab.

Figure 29 Adding Asset Required Details

Capital Planning Tool (QA) All Assets

Home

Required Fields Recommended Fields

Organization * Organization Altoona Metro Transit	Characteristics * Manufacturer Manufacturer (Other)
Service Status * Service Status	* Model Model (Other)
Identification & Classification * Vehicle Identification Number (VIN) * Asset ID	* Year of Manufacture Fuel Type Fuel Type (Other)
* Class Buses (Rubber Tire Vehicles)	Dual Fuel Type
* Type	* Length Length Units
* Subtype	* Seating Capacity (ambulatory)
* Estimated Service Life (ESL) Category	

Any field on the required tab must be filled out

Figure 30 Add the Asset and Go To The New Record

The screenshot shows the Capital Planning Tool (CPT) interface. On the left, there is a sidebar with sections like 'Funding', 'Procurement & Purchase', and 'Operations'. On the right, there are input fields for 'Seating Capacity (ambulatory)', 'Standing Capacity', 'ADA Accessible' (with radio buttons for Yes or No), 'In Service Date', 'Primary Mode', 'Service Type (Primary Mode)', and 'Dedicated Asset' (with radio buttons for Yes or No). At the bottom left of the main form area, there is a button labeled '+ Add Asset & Go to New Record'. An orange callout bubble with an arrow points to this button, highlighting it.

4.2 Accessing Existing Assets

Every asset is categorized by category (e.g., Revenue Vehicles, Equipment), class (e.g., Buses (Rubber Tire Vehicles, Rail Cars), type (e.g., BU-Bus, RL-Commuter Rail Locomotive), and a subtype (e.g., Bus Std 40 FT, Bus Articulated) as part of a standardized hierarchy. The asset category, class, type, and subtype relationship is the taxonomy that defines your inventory and dictates the attributes or data fields that exist for assets. The list of available category, class, and type options are standardized across the system, while subtype options and some data fields have been specifically configured for your specific system deployment.

Clicking on an asset class will drill down on the assets an organization possesses within that particular category and class.

Figure 31 Existing Assets

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Asset Summary, Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Map, Manage Overlay Services, Add Asset, Bulk Updates, and Num. Projects. Below the navigation bar is a table titled 'Asset Summary' with columns for Type, Avg. Age, Due, Agency, and Num. Projects. The table lists various asset types like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc., with their respective average ages and counts. A callout bubble with an orange arrow points to the 'Revenue Vehicles' item in the navigation menu, with the text 'Click Asset Class to access a list of assets'.

Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 32 Existing Asset Interface

The screenshot shows the Capital Planning Tool (QA) interface for the 'Revenue Vehicles' asset class. The page title is 'Revenue Vehicles' and the URL is 'Home > Revenue Vehicles > Buses (Rubber Tire Vehicles)'. The main content area displays a table of asset records with columns for Asset ID, Organization, VIN, Manufacturer, Model, Year, Class, Type, Subtype, Status, ESL, Last Life Cycle Action, and Life Cycle Action Date. The table lists numerous entries for Buses (Rubber Tire Vehicles) from various manufacturers like GIL, Ford, and Gillig, with details such as model numbers, years, and service status.

When you access the specific asset record, users can view the highlights section. The highlights sections contains asset summary information such as: a history log, location information, asset charts, asset value information, associated capital projects, and audit results. In addition, tasks, comments, documents, and photos can all be viewed, updated, and edited.

Figure 33 Asset Record: Highlights

Event	Date	Update	Notes
Condition	2/26/2018	Condition recorded as 5.0 (New/Excellent)	
Service Status Update	2/26/2018	Service status changed to In Service.	

In addition to accessing asset highlight information, users can view profile or summary data for that asset.

Figure 34 Asset Record: Profile and Summary

4.3 Editing or Updating Existing Asset Profile Data

Editing asset profile data allows users to modify core attributes that are not expected to change, but corrections may be necessary from time to time. Profile data can be modified by clicking on the edit button, editing the data, and clicking the “Save” button. Clicking the “Cancel” button will result in any changes not being saved.

Figure 35 Editing the Profile of an Existing Asset

The screenshot shows the CPT interface for managing asset profiles. At the top, there's a navigation bar with icons for Home, Back, Forward, and Search, along with dropdown menus for All Assets and All Organizations.

The main area displays a table of recent events:

Date & Time	Event By	Notes
08/30/2018 05:32:04 PM		
08/30/2018 05:32:04 PM		
08/30/2018 05:32:04 PM		

Below this is a detailed view of the asset profile. The 'Identification & Classification' tab is selected. The profile includes the following fields:

- Vehicle Identification Number (VIN):** 1N9WMAC6ZGC84200
- Asset ID:** 1602
- External ID:** NTD ID 351701
- Class:** Buses (Rubber Tire Vehicles)
- Type:** BU-bus
- Subtype:** Bus Std 35 FT
- Estimated Service Life (ESL) Category:** Heavy-Duty Small Bus

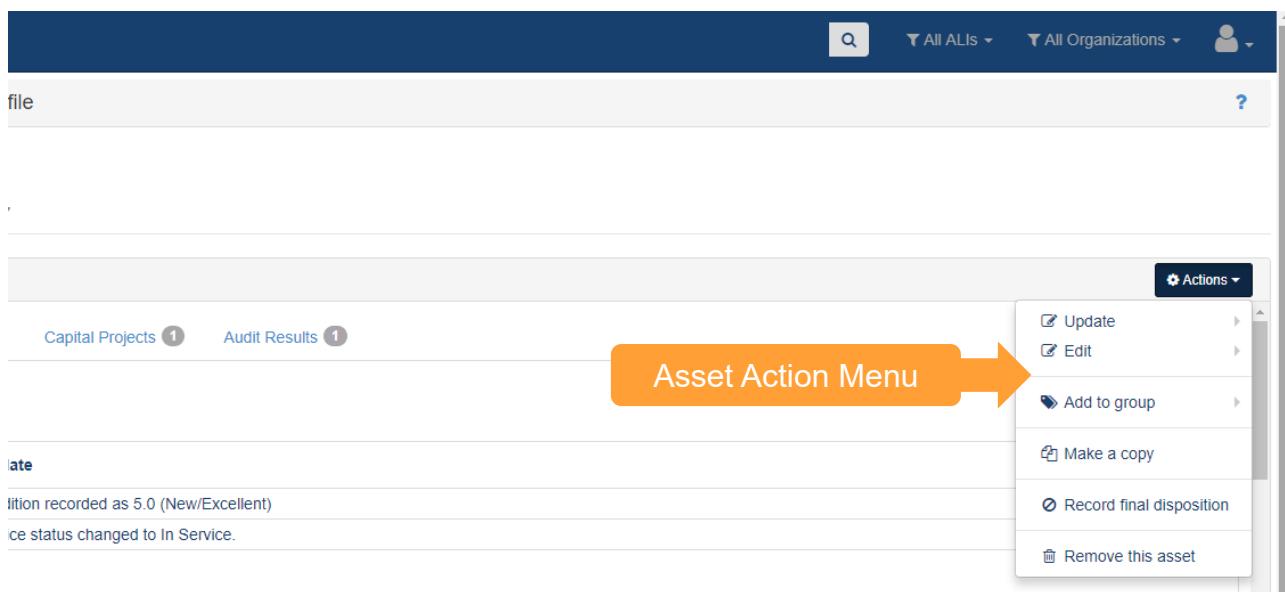
An orange callout bubble with the text "Click Edit to Alter Profile Data" points to the "Edit" button located at the bottom right of the profile section.

4.4 Updating Existing Asset Lifecycle Data

Asset lifecycle-related information can be edited, updated, changed, or deleted from the action menu in the top right of the screen.

Updating an asset will allow changes to attributes that are expected over the lifecycle of an asset. Asset details such as replacement status, mileage, etc. are expected to be updated periodically. Other actions should only need to happen one time during the life of an asset, such as requesting early or final disposition of an asset.

Removing an asset will permanently delete the asset and should be used only when absolutely necessary. This may option may only be available at certain permission levels.

Figure 36 Updating the Lifecycle of an Existing Asset

4.5 Action Events (Disposition and Transfer Review)

During an asset's service life, it is possible that the asset might be sold, reprovisioned, traded in, or transferred. As a result, a special event exists to record relevant information, and review any disposition requests that may be submitted, in order to complete the disposition effort.

Action Events depend on the disposition of an asset to perform certain functions. The available functions will vary depending on individual permissions and organizational policy. Action Events occur when an asset is proposed for an early disposition or an asset is newly transferred. You can submit a request for early disposition from the action menu on an asset.

Figure 37 Asset Action Events (Disposition and Transfer)

The screenshot shows the Capital Planning Tool (CPT) dashboard. In the center, there is a table titled "Capital Projects" with columns "Agency", "Num. Projects", and "Cost". An orange arrow points to a dropdown menu labeled "Action Events" which contains options: "Early Disposition Proposed" and "Newly Transferred Assets". To the right of the table, there is a section titled "My Notices" with a message "No notices." Below the main table, there is a "Audit Summary" section with a chart titled "Annual Inventory Update Results" showing completion percentages for various asset types across different agencies.

An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

Record final disposition will keep a record of an asset's existence when it is no longer in service. This option will essentially archive an asset so that the history exists, but the asset is no longer considered in the pool of operational assets for an organization.

Early disposition requests can be reviewed from the Early Disposition Proposed page. Select the check box next to an asset, then the select the button to Approve or Reject a proposed early disposition.

Figure 38 Early Disposition Requests

The screenshot shows the Capital Planning Tool (CPT) interface with the title "Home > Early disposition proposed". At the top, there are three buttons: "Export All", "Approve", and "Reject". An orange arrow points to the "Approve" and "Reject" buttons. Below these buttons is a table listing early disposition requests. The table has columns: "Select", "Agency", "Type", "Asset Tag", "Description", "Parent", "Location", "Status", "Age", and "Co". The first row shows a request for "RRTA" with "Bus Maintenance Equipment" type, asset tag "2314", description "BUS LIFTS-LORISER IN-GROUND HYDRAULIC LIFT", status "O", age "13", and a checkbox checked. The second row shows a request for "BARTA" with "Bus Std 35 FT" type, asset tag "0409", description "CCI Opus 34 LF", status "O", age "14", and a checkbox checked. The third row shows a request for "YCTA" with "Bus < 30 FT" type, asset tag "5010", description "CMC Challenger", status "O", age "1", and a checkbox checked.

4.6 Adding or Updating Assets by Bulk Update

Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be reprovisioned or disposed in this planning cycle using their favorite spreadsheet software externally.

Figure 39 Bulk Updates

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary'. The main area displays a table of asset data with columns for Type, Avg. Age, and various financial metrics. A vertical navigation bar on the right lists categories like Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Map, Manage Overlay Services, and a prominent '+ Add Asset' button. Below these are sections for 'Bulk Updates' and 'Capital Projects'. An orange callout box highlights the 'Bulk Updates' section, which contains a table with columns for Agency, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. An orange arrow points from the 'Bulk Updates' label to the 'Bulk Updates' section in the sidebar.

Selecting “Bulk Updates” allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

Figure 40 Bulk Update Tools

This screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' and 'Upload a Template', with an orange arrow pointing to the 'Create a new Template' button. Below these are filter options for 'Filter Status'. The main area is a table with columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. It lists several entries, including PIKECO, END, and WBT, each with a corresponding file name and processing details. An orange callout box highlights the 'Create a new Template' button.

The first step to a bulk update is Creating a Template. Click “Create a new Template”, then select your Template Type, Organization, and Asset Class, then select “Create Template.”

Figure 41 Bulk Update Details

Capital Planning Tool (QA) Home Bulk Updates Download Template

Bulk Update Templates

Use this form to customize and download an asset inventory update template. These templates can be used to:

- Update service status, condition, and mileage of existing inventory
- Record the last maintenance performed for each asset
- Identify assets that are going to be disposed or re-provisioned in this planning cycle

Once you click **Create template**, a spreadsheet will be generated that you can save to your computer. After the template has been downloaded, open the template in Microsoft Excel and update the rows. Make sure to **Save** the template after you have finished editing it.

When ready use the **Upload** function to upload the spreadsheet template to CPT and the updates will be processed.

Select Template and Asset Type

Template Type: Inventory Updates

Fta Asset Class: Select fta asset class...

Organization: Organization dropdown

Create template button

Choose these parameters

Select “Download File” and save the resulting spreadsheet on your computer.

Figure 42 Bulk Update Spreadsheet Download

Capital Planning Tool (QA) Home Bulk Updates Download Template

Success

Your template has been created. Click the button below to download the file to your computer.

Download File

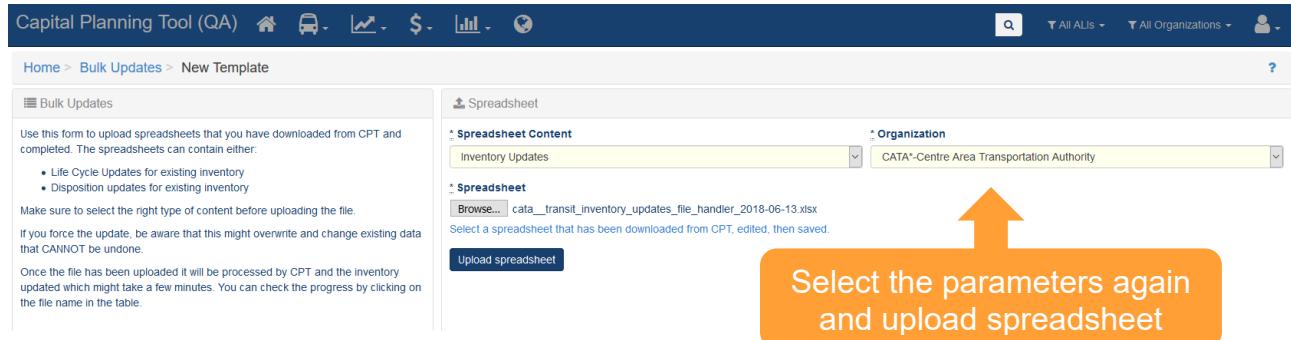
Edit the resulting spreadsheet and make sure you save your changes.

Figure 43 Bulk Update Spreadsheet

Asset	Object Key	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep
3	A2E18C2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN08YYU020684	In Service	01/23/2018			1.00	01
4	A2E18C29FDGK6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN07DXYU020685	In Service	01/23/2018			1.00	01
5	A2E18C3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018			1.00	01
6	A2E18C47GK4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2919151090105	In Service	01/23/2018			1.00	01
7	A2E18C47M4FE	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2919151090106	In Service	01/23/2018			2.00	01
8	A2E18C56GK2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2912151090107	In Service	01/23/2018			2.00	01
9	A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2914151090108	In Service	01/23/2018			2.00	01
10	A2E18C69PBLB	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2916151090109	In Service	01/23/2018			2.00	01
11	A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2912151090110	In Service	01/23/2018			2.00	01
12	A2E18C800038	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271911091506	In Service	01/23/2018			2.00	01
13	A2E18C817GK3	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2711081091506	In Service	01/23/2018			2.00	01
14	A2E18C8915GC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE27121091091507	In Service	01/23/2018			2.00	01
15	A2E18C935F40	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE2711281091508	In Service	01/23/2018			2.00	01
16	A2E18C9AA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE27161091509	In Service	01/23/2018			2.00	01
17	A2E18C9B0HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091510	In Service	01/23/2018			2.00	01
18	A2E18C9E8MK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271481091511	In Service	01/23/2018			2.00	01
19	A2E18C9G4N614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091512	In Service	01/23/2018			2.00	01
20	A2E18C9GL0KL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091652	In Service	01/23/2018			2.00	01
21	A2E18C9DB897DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271091091653	In Service	01/23/2018			2.00	01
22	A2E18CE07EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271291091654	In Service	01/23/2018			2.00	01
23	A2E18GEF3ECK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271491091655	In Service	01/23/2018			2.00	01
24	A2E18GF54C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271691091656	In Service	01/23/2018			2.00	01
25	A2E18GFNSG4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091657	In Service	01/23/2018			2.00	01
26	A2E18GG6KQ40	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091658	In Service	01/23/2018			2.00	01
27	A2E18GGG3JG	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091659	In Service	01/23/2018			2.00	01
28	A2E18GHAB0	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091660	In Service	01/23/2018			2.00	01
29	A2E18GHKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091661	In Service	01/23/2018			2.00	01
30	A2E18GIA78K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091662	In Service	01/23/2018			2.00	01
31	A2E18GIN06GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291651111645	In Service	01/23/2018			2.00	01
32	A2E18GUCFK1	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291851111646	In Service	01/23/2018			2.00	01
33	A2E18GK1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X51111647	In Service	01/23/2018			2.00	01
34	A2E18GL4K4	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291511111648	In Service	01/23/2018			2.00	01
35	A2E18GL48C44	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079888	In Service	01/23/2018			2.00	01
36	A2E18GLUHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079889	In Service	01/23/2018			2.00	01
37	A2E18GMNPNW4	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGR271191A1178187	In Service	01/23/2018			2.00	01

Head back to the Bulk Updates page and at the top select “Upload a Template.” Select the parameters on the right that were used to create the template and then click browse and find your edited spreadsheet. Then click Upload spreadsheet.

Figure 44 Bulk Update Upload



If your file uploads successfully, the main Bulk Update screen should reappear with a “File was successfully uploaded banner” and you should see the most recent update appear at the top of the bulk update history. The system will perform the updates and a new notification will appear in your notification tray once all updates are complete.

Figure 45 Bulk Upload Processing

The screenshot shows the 'Bulk Updates' page after a file has been uploaded successfully. A green banner at the top says 'File was successfully uploaded.' Below is a table titled 'Bulk Updates' with columns: Agency, File Name, Content, Loaded By, Status, Num Rows Processed, Num Rows Added, Num Rows Failed, and Processing Time. Two rows are listed:

Agency	File Name	Content	Loaded By	Status	Num Rows Processed	Num Rows Added	Num Rows Failed	Processing Time
CATA*	cata_transit_inventory_updates_file_handler_2018-06-13.xlsx	Inventory Updates	Elizabeth Bonini	Unprocessed				0s
PIKECO	pikeco_transit_inventory_updates_file_handler_2018-04-17.xlsx	Inventory Updates	Toni Marino	Complete	30	25	0	2s

Each row in the Bulk Update table contains additional information and options if you click that update. Use this interface to identify any issues that might have occurred during the bulk upload process. From the actions menu, you can resubmit the file for processing, download that specific spreadsheet again, revert the changes made by this update, or remove the file used to update from the list.

Figure 46 Bulk Update Edit

Home > Bulk Updates > cata__transit_inventory_updates_file_handler_2018-06-13.xlsx

File Upload

Name: cata__transit_inventory_updates_file_handler_2018-06-13.xlsx
Content: Inventory
Uploaded By: Elizabeth
Upload Time: 04:36 PM 06/13/2018
Status: Complete

Actions

- Resubmit this file
- Download this file
- Undo changes
- Remove this file

Details

Processing Process Log Updates

Time Started: 04:36 PM 06/13/2018
Time Complete: 04:36 PM 06/13/2018
Rows Processed: 127
Num. Rows Added: 0
Num. Rows Skipped: 0
Num. Rows Replaced: 0
Num. Rows Failed: 0

4.7 Query

The system has the ability to query the database of all assets for those matching specific search criteria and provides the ability for users to build, save, and share custom data exports.

Figure 47 Asset Query

TransAM Asset Manager (Staging)

Home

Asset Summary All

Org Category : Class
SFRTA Revenue Vehicles Buses (Rubber Tire Vehicles)

Query your Assets

Revenue Vehicles
Equipment
Facilities
Infrastructure
Groups
Query
Map
Manage Overlay Services
Add Asset
Bulk Updates

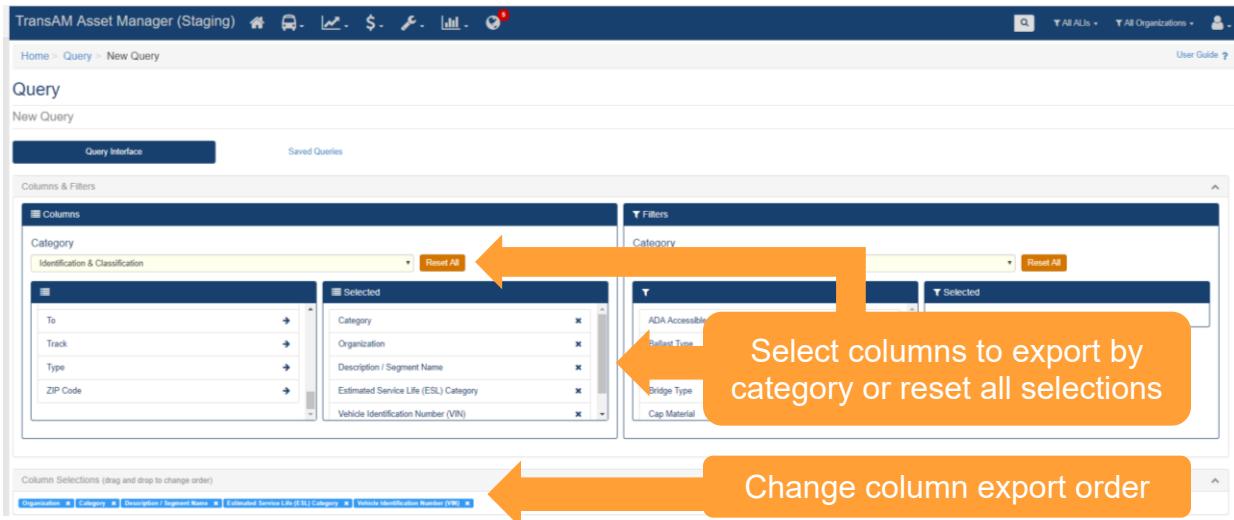
Capital Projects
Agency SFRTA
Audit Summary

Name	Most Recent Login	Login Count	Account Locked
Jack Birger	03/13/2019 08:49 AM	246	✉️
Lydia Chang	12/26/2018 03:52 PM	50	✉️
Kyle Emge	09/04/2018 01:20 PM	2	✉️
Yingfei Huang	02/01/2019 09:16 AM	12	✉️
Carla McKeever	03/06/2019 12:05 PM	4	✉️
Scott Meeks			✉️
system user			✉️
Elizabeth Walter	10/29/2018 04:44 PM	4	✉️
Peng Zhu	02/01/2019 09:15 AM	26	✉️
Eric Ziering			✉️

From the Query screen, users can select each data field you want to export from a variety of attributes within the Columns panel. All data fields belong to a specific category. Select a category to refresh the data fields available for selection. Users can select each individual column that you want to add to the export, by moving fields to the Selected box by clicking on the arrow in each field and remove selected fields by clicking on the

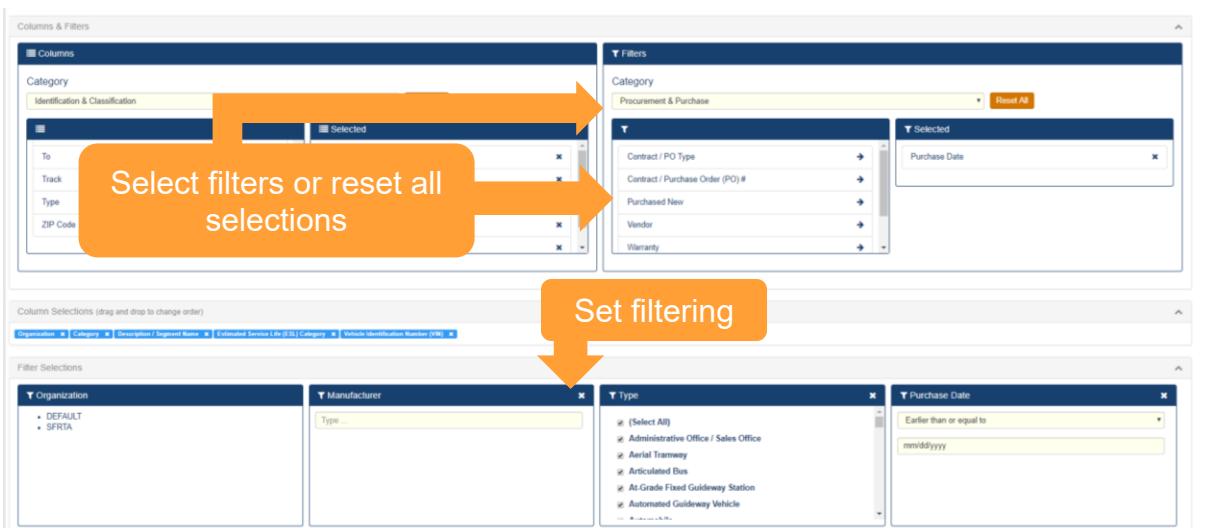
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be removed by clicking ‘Reset All’.

Figure 48 Column Selection



From the Query screen, you can also select what data to filter. Filtering functionality works in a similar manner as column selection. Select each individual data field that you want to filter, by moving fields to the Selected box by clicking on the arrow in each field and remove selected fields by clicking on the “x” of each selected field. Selected filters appear in the Filter Selections panel, where the user can set filtering parameters. The organization data field is always added as default selection, and is non-configurable as it is set by the sitewide organization filter.

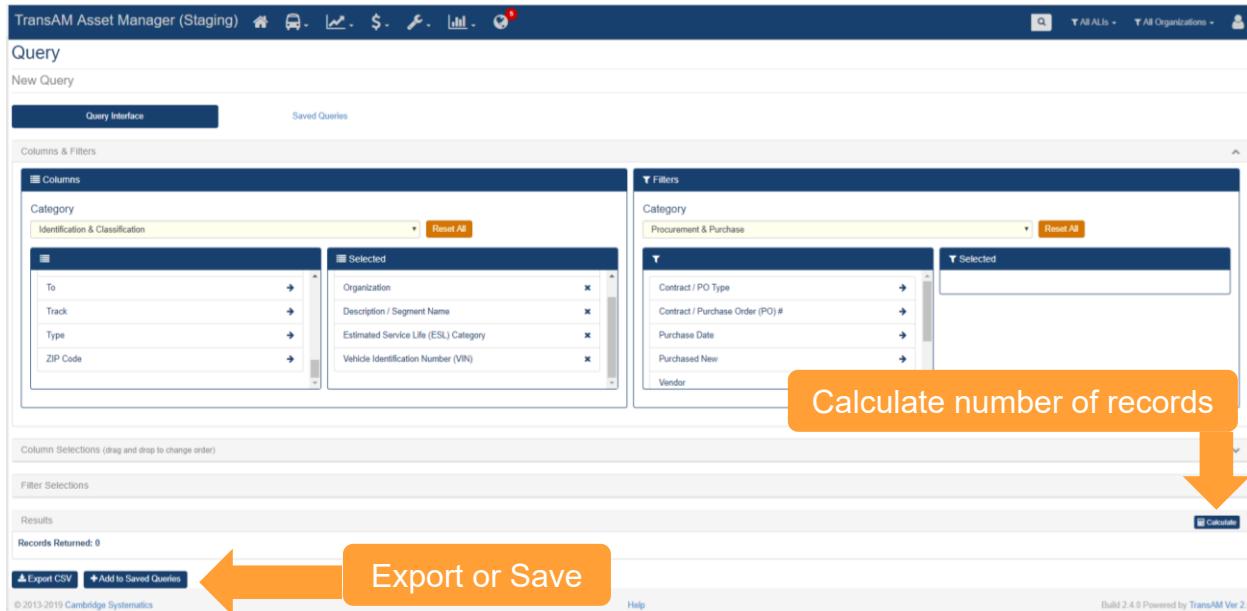
Figure 49 Filter Selection



Once the query is ready to be used, users can click the “Calculate” button in the results section to see how many records will be returned. Clicking the “Calculate” button is not required, but serves as a gauge to see if

the query that has been developed is returning the anticipated number of records. At this point, users can either export or save the query. If a user chooses to save a query, they will have the ability to share the query with users in associated or child organizations, so long as the user has a Manager user role.

Figure 50 Calculate, Export or Save



Saved queries can be accessed by clicking on the Saved Queries button at the top of the screen. All queries save to the profile of the user initiating the save action. If a user has a Manager user role, the user is allowed to share the query with other users within any organization tied to the Manager. Parent organization users with a Manager role can share queries with associated child organizations as well. Shared queries can only be edited by a Manager from the “Shared From” organization. Shared queries from parent organizations cannot be deleted by child organizations, but queries shared by users within the same organization can be deleted from individual user profiles.

Additional query functionality includes the ability to export, edit, and copy queries, as well as copy the SQL statement, and monitor query history, all from within the saved queries section.

Figure 51 Saved Queries

Name	Description	Shared To	Shared From	SQL Query	Created Date & Time	Created By	Last Update Date & Time	Last Updated By	Actions
Primary Asset Query	Used to determine overall quantity of assets.	SFRTA		Click to Show SQL	03/13/2019 10:30 AM	Lydia Chang	03/13/2019 10:30 AM		

4.8 Map

The system provides the ability to overlay asset locations on a map.

Figure 52 Asset Map

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Bus, Line Graph, Dollar Sign, Bar Graph, and a globe. Below the navigation bar is a sidebar titled 'Asset Summary'. The sidebar contains a table with columns 'Type' and 'Avg. Age', listing various assets like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc., along with their average ages. To the right of the sidebar is a vertical list of categories: Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, and Action Events. Further down the sidebar is a 'Map' section with options for 'Manage Overlay Services', '+ Add Asset', 'Bulk Updates', and a summary of asset values. On the far right, there's a list of 'Agency' names. An orange callout bubble with the text 'Map your Assets' points to the 'Map' button in the sidebar.

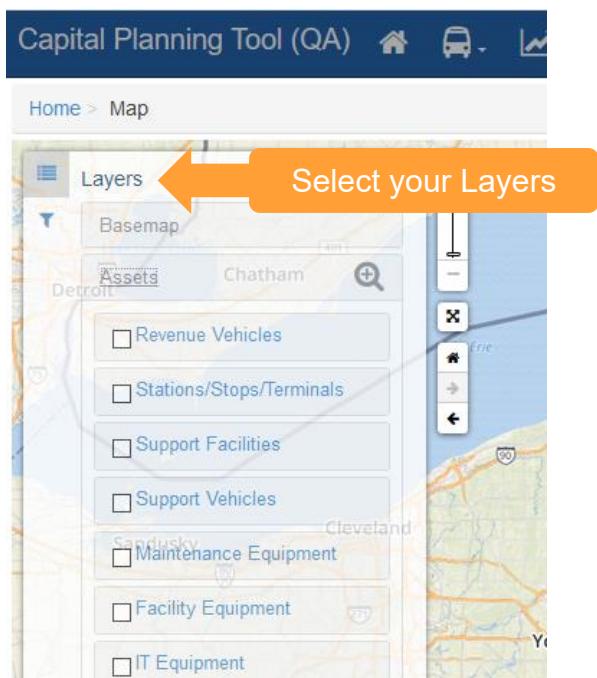
The map has several key features. You can customize the map from the two icons in the bar on the left of the map.

Figure 53 Map Customization

The screenshot shows the Capital Planning Tool (QA) Map customization interface. It features a large map of the Northeastern United States, including states like New York, Pennsylvania, and New Jersey. The map displays a network of roads in orange. A legend in the bottom right corner identifies the road types. On the left side, there's a vertical toolbar with various map control icons. An orange callout bubble with the text 'Customize and Control the Map' points to these icons.

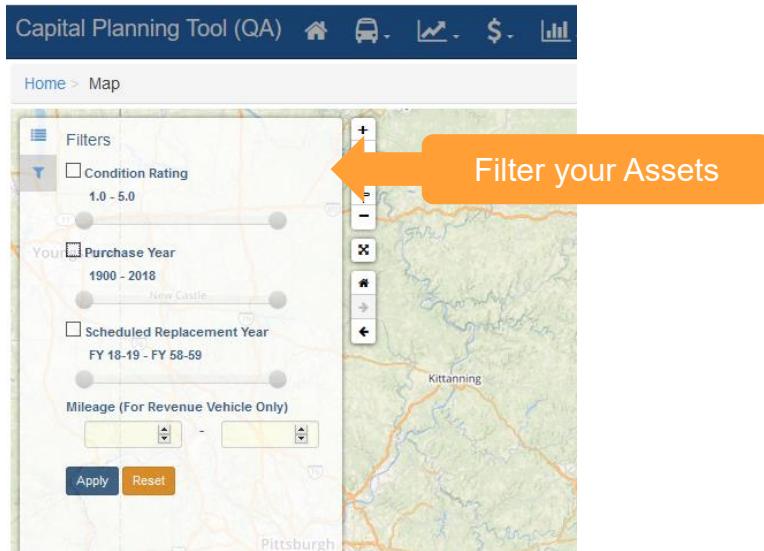
Clicking the top icon allows you to select which layers to display on the map. You can select a default map, the Esri streets map, the Esri Satellite map, or the Esri topographic map as your basemap. Clicking assets will allow you to specify which asset types you wish to display on the map.

Figure 54 Map Layers

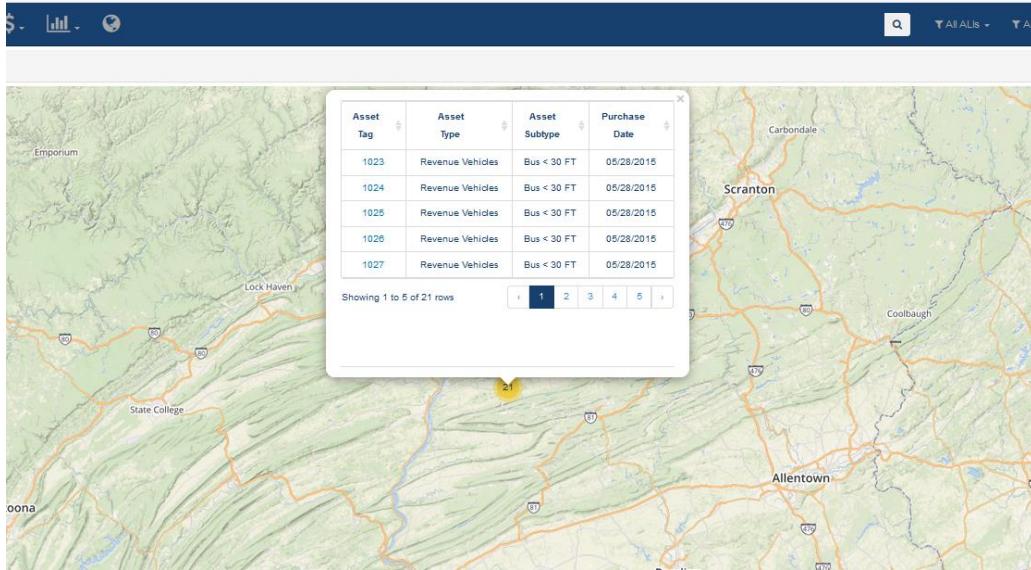


Clicking the filter icon will allow you to pare down the assets that are displayed on the map.

Figure 55 Map Filter



Once assets are displayed on the map, clicking a group of assets will provide summary information.

Figure 56 Map Asset Details

4.9 Groups

Agencies can create an on-the-fly collection of assets called groups so that they can quickly recall commonly viewed assets all at once. They can be accessed from the Asset Inventory Menu.

Figure 57 Asset Groups

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Asset Summary, and various financial and reporting tools. The main content area displays an asset summary table with columns for Type, Avg. Age, and Num. Below the table is a dropdown menu under the 'Agency' heading. The 'Groups' option is highlighted with an orange arrow. Other options in the dropdown include Action Events, Map, Manage Overlay Services, Add Asset, Bulk Updates, and Manage Groups. To the right of the dropdown, there is a list of agency names: buses that are 35ft in length, Fleet Plan Audit, Cumberland County, Maintenance Facility, Franklin County, Union-Snyder Counties, Columbia County, Montour County, Perry County, Disposal to Be Finalized, and Manage Groups.

Individual assets can be added to the group from their details menu.

Figure 58 Adding an Asset to a Group

Capital Planning Tool (QA) Home Buses \$ Audit Results

Home > Revenue Vehicles > Buses (Rubber Tire Vehicles) > Buses (Rubber Tire Vehicles) Profile

Revenue Vehicle Profile

CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017

Highlights

Add an Asset to a Group

Event Date

Condition	2/26/2018	Condition recorded as 5.0 (New/Excellent)
Service Status Update	2/26/2018	Service status changed to In Service.

Actions

- Update
- Edit
- Add to group
- Make a copy
- Record final disposition
- Remove this asset

Asset Summary

Profile

Identification & Classification Characteristics Funding Procurement & Purchase Operations Registration & Title

Identification & Classification

Vehicle Identification Number (VIN)
15GGB2713H3189913

* Asset ID
#1701

External ID
#1701

NTD ID
#1701

Age: 0 yrs
Mileage:

<https://cpt-qc.camsys2apps.com/inventory/AZED1DU88E8E#>

5.0 Maintenance

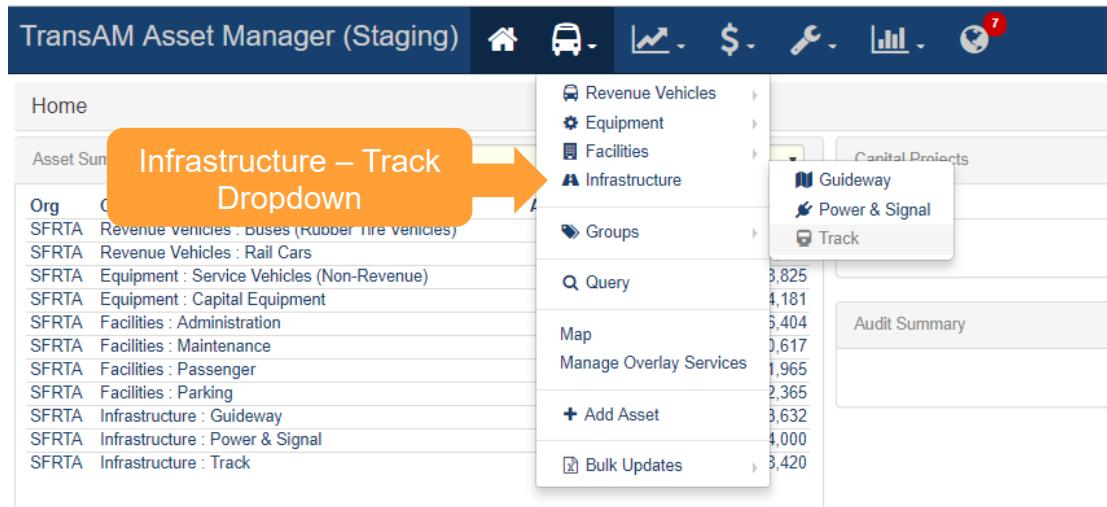
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

5.1 Performance Restrictions

Organizations that have Infrastructure – Track data in the asset inventory, can utilize the Performance Restrictions feature. This feature can be used to monitor daily, track-based speed restrictions or work restrictions on individual track segments. All restrictions must be reported utilizing the same linear reference method used for the Infrastructure – Track asset data.

Performance Restrictions can be reported within an individual Infrastructure – Track asset profile, which can be accessed from the Asset Inventory dropdown

Figure 59 Asset Inventory Dropdown : Infrastructure - Track



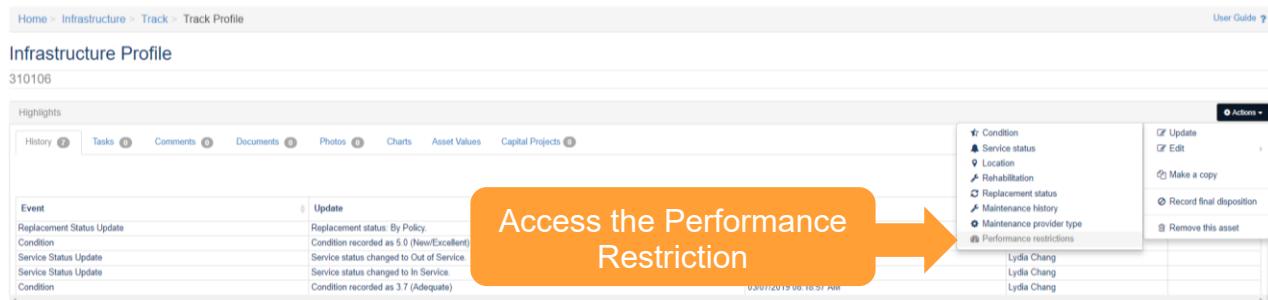
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 60 Existing Asset Interface : Infrastructure - Track

The screenshot shows the 'Infrastructure - Track' asset interface. At the top, there's a search bar with 'All Track' and a 'Export All' button. Below it is a table with columns: Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. An orange callout bubble points to the 'Asset ID' column header, with the text 'Access the Infrastructure – Track Record' inside. The table contains several rows of data, with the first few rows showing 'South Florida Rail Corridor' and various track numbers. At the bottom, there's a page navigation bar showing 'Showing 1 to 10 of 275 rows' and '10 rows per page'.

Performance Restrictions can be reported from the action menu in the top right of the screen.

Figure 61 Lifecycle Action Menu



When accessing the Performance Restriction Lifecycle Event, data associated with the track segment auto-populates the event fields, including the maximum permissible speed, which populates the speed restriction field. As a user, you can edit the speed restriction, and set the period of the restriction. The restriction period can be set to “Until Removed”, which means the restriction will be active until a user manually closes the restriction, or the restriction can be set for a specified period of time, to include hours, days or weeks. If the restriction is set to a specified period of time using “Set Length”, the restriction will automatically closeout upon expiration of the specified time period.

Users can also adjust the linear “From” and “To” marker post values (which were auto-populated from the track record), in order to modify the length of the restriction segment. Modifying the restriction length means the track restriction can be reported for more than one segment of track, even though the event was initiated from a single record. If the “From” or “To” value is extended beyond the “From” and “To” values of the initial reporting segment, all other associated linear segments covered under the new values will appear in the “Associated Linear Asset Records” section. Users can also submit restrictions utilizing on the “From” value, for single location restrictions, such as switch points and all restrictions must have a restriction cause selected.

Figure 62 Performance Restriction Lifecycle Event

Once a Performance restriction is submitted it appears in the Performance Restrictions section, along with all previously submitted restrictions, and can be managed by accessing the Maintenance Dropdown.

Figure 63 Maintenance Dropdown

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Assets, Reports, Budget, Performance, Tools, and Help. Below the navigation bar, a large orange callout bubble points to the 'Performance Restrictions' button in the top right corner of the main content area. The main content area displays three tables: 'Asset Summary' (listing various asset categories like Revenue Vehicles, Equipment, Facilities, etc., with columns for Org, Category : Class, Avg. Age, Count, and Cost), 'Capital Projects' (listing projects by Agency, Num. Projects, and Cost), and 'Audit Summary' (indicating 'No active audits found').

All restrictions in an “Active” status appear by default in the management section. Events can be filtered to “All” or “Expired” to view historical restrictions, by status. Filtering can also be achieved by searching for events that were active within a specified period of time. If a restriction is no longer active, it can be manually closed by clicking the “Closeout” button. If a restriction was closed in error, the user can filter for expired restrictions and reopen the restriction event that was closed in error. All restriction event data can be directly exported from the table.

Figure 64 Performance Restriction Management

The screenshot shows a table titled 'Performance Restrictions' with a heading 'Active Restrictions'. The table has columns for Status (Active), ID, Asset / Segment, Org, Desc / Segment, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. There are 7 rows of data, each representing a different restriction event. The 'Comments' column for each row contains a 'Closeout' button. A small note at the bottom left says 'Showing 1 to 7 of 7 rows'.

Status	Active	ID	Asset / Segment	Org	Desc / Segment	Subtype	Line	From	Line	To	Track	Max Permissible Speed	Unit	Speed Restriction	Restriction Cause	Active Start	Active End	Submitted By	Status	Comments
Active	311107	SFRTA	N/A	Tangent (Straight)	SX	1,024.00	SX	1,024.60	2	79	mph	25	mph	Other	07/05/2017 12:00 AM	Until Removed		Active	<button>Closeout</button>	
Active	310104	SFRTA	N/A	Tangent (Straight)	SX	970.20	SX	970.40	2	30	mph	20	mph	Rail Defect	03/06/2019 09:52 AM	Until Removed	Lydia Chang	Active	<button>Closeout</button>	
Active	311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 10:26 AM	Until Removed	Lydia Chang	Active	<button>Closeout</button>	
Active	311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 11:19 AM	03/19/2019 11:19 PM	Lydia Chang	Active	<button>Closeout</button>	
Multiple	SFRTA	Multiple	Multiple	SX	991.08	SX	992.00	Single	Multiple	Multiple	mph	28	mph	Rail Defect	03/13/2019 02:18 PM	Until Removed	Lydia Chang	Active	<button>Closeout</button>	
Multiple	SFRTA	Multiple	Multiple	SX	964.10	SX	965.00	Single	Multiple	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:19 PM	Until Removed	Lydia Chang	Active	<button>Closeout</button>	
Multiple	SFRTA	Multiple	Multiple	SX	969.10	SX	970.00	Single	Multiple	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:22 PM	Until Removed	Lydia Chang	Active	<button>Closeout</button>	

6.0 Policies

A Policy is a set of parameters that establishes rules related to assets saved within the system. While an organization can create and modify multiple policies, each organization can only have one current policy at a time. The policy is applied to an organization's inventory on an asset by asset basis so that policy rules are reflected on every individual asset.

Figure 65 Policies Dropdown

The screenshot shows the CPT interface with the 'Policies' option highlighted in the main navigation bar. A large orange arrow points from the text 'Policies Dropdown' to the 'Policies' link in the navigation bar. Below the navigation bar, there is a 'Home' section and an 'Asset Summary' table. To the right of the table is a 'Policies' dropdown menu with several options: 'Capital Projects', 'Project Planner', 'SOGR Capital Project Analyzer', 'All Audit Results', and 'Annual Inventory Update Results'. Below the dropdown is a table titled 'Capital Projects' showing data for various organizations like ACTS, AMTRAN, and BARTA. At the bottom left is a 'My Tasks' section.

Clicking “Policies” in the dropdown will display the Policy options that are available. Each individual policy also can be accessed through the submenu navigation options, by hovering over the policies selection in the main navigation dropdown.

Figure 66 Policy Rule Sets

The screenshot shows the CPT interface with the 'Policies' page selected. An orange arrow points from the text 'Policy Rule Sets' to the 'TAM Policy' link in the navigation bar. On the left is a card for 'Asset Replacement/Rehabilitation ...' and on the right is a card for 'TAM Policy'.

6.1 Asset Replacement/Rehabilitation Policy

Asset Replacement and Rehabilitation Policies can be chosen under the Policies submenu. The SOGR Capital Project Analyzer, Capital Projects, and Project Planner tools apply this policy to determine the estimated service life, replacement cost, and depreciation of an asset. Asset Replacement/Rehabilitation Policy Rules here can be set at the State or individual organization level. This type of policy set will persist from year to year, unless edited or removed.

Figure 67 Asset Replacement/Rehabilitation Policy

The screenshot shows the Capital Planning Tool (QA) interface. In the top navigation bar, there is a dropdown menu labeled "Policies". A callout bubble points to the "Asset Replacement/Rehabilitation Policy" option in this menu. An orange arrow points from the text "Asset Replacement/Rehabilitation Selection" to the same callout bubble. The main content area displays a table of asset summary data, and the right side shows a list of organizations with their respective policy values.

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	3.3	23	\$1,150,393	\$1,156,774
ACTS Support Facilities	2.0	1	\$403,440	\$403,440
AMTRAN Revenue Vehicles	11.8	29	\$5,460,730	\$2,000,000
AMTRAN Stations/Stops /Terminals	10.6	5	\$58,487	\$20,462
AMTRAN Support Facilities	29.0	5	\$2,274,755	\$1,108,904
AMTRAN Support Vehicles	4.6	7	\$205,513	\$72,536
AMTRAN Maintenance Equipment	12.7	211	\$3,036,981	\$478,390
AMTRAN Facility Equipment	30.5	90	\$2,907,326	\$1,132,105
AMTRAN IT Equipment	6.2	84	\$54,756	\$20,143

Organization	Count	Value
BARTA	2	\$6,387,280
BCT	3	\$1,843,909
BCTA	3	\$236,000
BMC	1	\$97,020
BSS	2	\$528,432
BTA	7	\$9,003,734
BUTLER	1	\$100,000
CARBON	1	\$570,000
CARS	1	\$134,239
CAT	4	\$6,555,761
DATA	0	\$0,570,000

Use the organization filter dropdown to choose the correct organization. You will then need to select the policy year that you wish to work with. Pressing the Filter Button will display the policy rules for the organization and policy year that you have chosen.

Figure 68 Asset Replacement/Rehabilitation Policy Filters

The screenshot shows the "Asset Replacement/Rehabilitation Policy" filters page. It includes a "Filters" section with dropdowns for "Organization" (set to "BPT-PennDOT Bureau of Public Transportation") and "Policy Year" (set to "FY 2017 Statewide Transit Policy (Current)"). Orange arrows point from the text "Organization Filter" and "Policy Year" to these respective dropdowns. The main content area displays policy rule details for the selected organization and year, including fields like "Policy Owner", "Description", "Condition Threshold", and "Depreciation Interval".

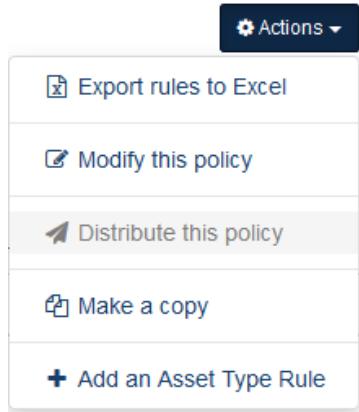
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 69 Policy Rules

The screenshot shows the 'Policy Rules' section of the Capital Planning Tool. It includes fields for 'Policy Owner' (PennDOT Bureau of Public Transportation) and 'Description' (FY 2017 Statewide Transit Policy). A dropdown menu shows 'Active'. On the right, there's a large orange arrow pointing to a 'Policy Rules Actions' button. Below this are tabs for different asset types: Revenue Vehicles, Stations/Stops/Terminals, Support Facilities, Support Vehicles, Maintenance Equipment, Facility Equipment, IT Equipment, Office Equipment, Communications Equipment. Under each tab, there are specific calculation methods listed: Service Life Calculation Method (Age and Mileage), Repl. Cost Calculation Method (Purchase Price + Interest), Condition Rollup Calculation Method (Weighted Average), Annual Inflation Rate (1.10), Pct Residual Value (0%), and Last Updated (10:58 AM 02/07/2017). A 'Depreciation Interval' dropdown is also visible.

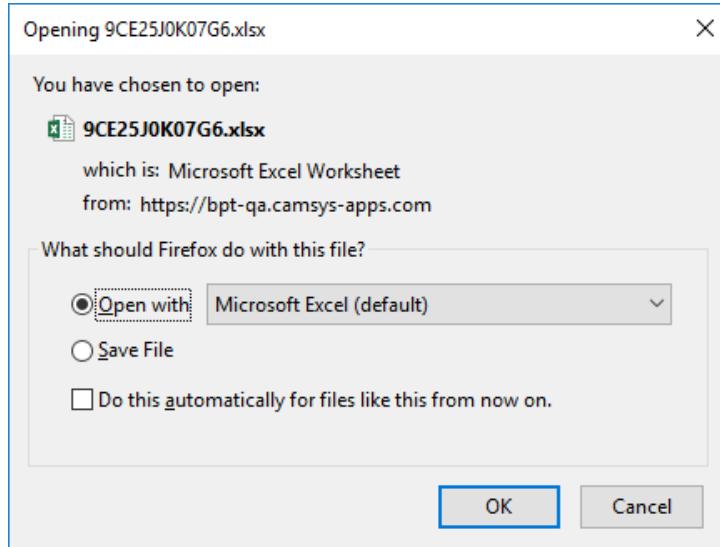
The Actions button will display a list of options as shown.

Figure 70 Policy Rules Actions Dropdown



Export rules to Excel opens a dialog box to save the Policy Rule as an Excel spreadsheet file.

Figure 71 Export rules to Excel (Windows dialog box)



Modify this Policy will open a dialog box that displays the editable fields at the organization level. When you are done making edits, click "Update Policy" button to apply changes.

Figure 72 Modify (Update) Organization Policy Dialog

Update Policy

* Description
FY 2017 Statewide Transit Policy

* Condition Threshold
2.5

* Depreciation Calculator
Straight Line

* Depreciation Interval
Annually

Update Policy

If you are content with a parent policy and wish to distribute the policy rules through to one or more child organizations, select “Distribute this Policy.” A warning will display, as shown, to inform you that child organizations will need to choose whether to apply this policy.

Figure 73 Distribute Policy

Distribute Policy

Warning!

The parent policy will be distributed to the children policies. After distribution, agencies will need to apply their policies and re-run the SOGR builder. If you would like to apply or build SOGR projects for all agencies at once, please contact Cambridge Systematics.

Run...

Users can create new policies by copying an existing policy. Make a Copy displays the same dialog as Update Policy but once saved, a new policy is created based on the copied policy. When copying a policy, you can set the initial organization wide parameters. For example, Depreciation Calculator can be changed from “straight line” to “declining balance.” The new created Policy is named according to the Description text box shown.

Figure 74 Copy Organization Policy Dialog

Update Policy

* **Description**
Copy of FY 2017 Statewide Transit Policy

* **Condition Threshold**
2.5

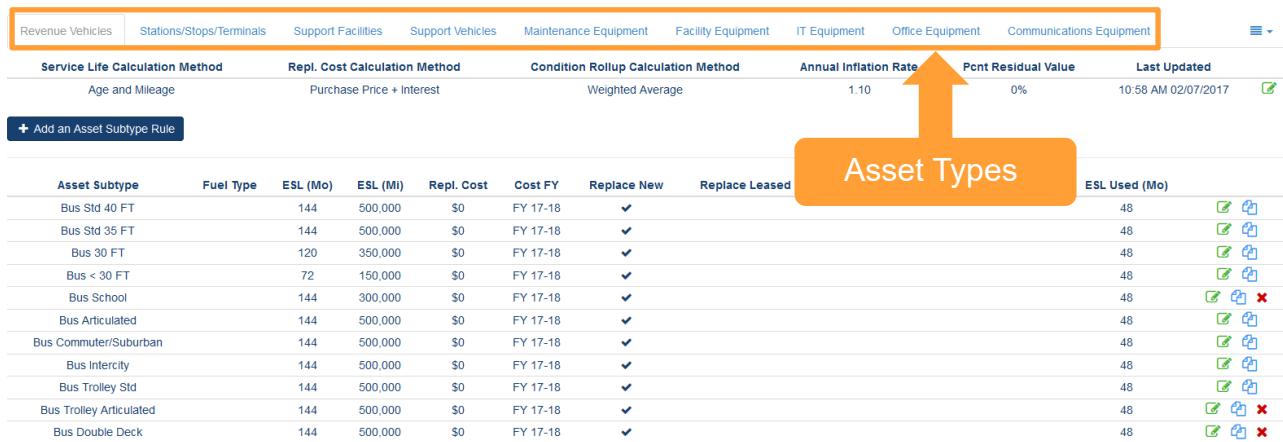
* **Depreciation Calculator**
Straight Line

* **Depreciation Interval**
Annually

Create Policy

Asset types are shown as a series of clickable tabs. Asset subtypes and corresponding asset type rules are listed below each Asset type.

There are a set of rules for each asset type which deal with service life calculation, replacement cost calculation type, condition rollup calculation, annual inflation rate, percent residual value, and condition rollup weight.

Figure 75 Asset Types


The screenshot shows a table of asset subtypes under the 'Asset Types' tab. The table has columns for Asset Subtype, Fuel Type, ESL (Mo), ESL (Mi), Repl. Cost, Cost FY, Replace New, Replace Leased, and ESL Used (Mo). An orange callout points to the 'Asset Types' header, which is highlighted in blue. A large orange arrow points upwards from the table towards the header.

Asset Types								
Asset Subtype	Fuel Type	ESL (Mo)	ESL (Mi)	Repl. Cost	Cost FY	Replace New	Replace Leased	ESL Used (Mo)
Bus Std 40 FT		144	500,000	\$0	FY 17-18	✓		48
Bus Std 35 FT		144	500,000	\$0	FY 17-18	✓		48
Bus 30 FT		120	350,000	\$0	FY 17-18	✓		48
Bus < 30 FT		72	150,000	\$0	FY 17-18	✓		48
Bus School		144	300,000	\$0	FY 17-18	✓		48
Bus Articulated		144	500,000	\$0	FY 17-18	✓		48
Bus Commuter/Suburban		144	500,000	\$0	FY 17-18	✓		48
Bus Intercity		144	500,000	\$0	FY 17-18	✓		48
Bus Trolley Std		144	500,000	\$0	FY 17-18	✓		48
Bus Trolley Articulated		144	500,000	\$0	FY 17-18	✓		48
Bus Double Deck		144	500,000	\$0	FY 17-18	✓		48

If there are too many asset types to fit in the tabs, you will see the dropdown icon, as depicted below.

Figure 76 Additional Assets Dropdown Icon

The Asset Type Rules are listed below the Asset Types.

Figure 77 Asset Type Rules

Revenue Vehicles	Stations/Stops/Terminals	Support Facilities	Support Vehicles	Maintenance Equipment	Facility Equipment	IT Equipment	Office Equipment	Communications Equipment	Last Updated	
Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pcnt Residual Value						
Age and Mileage	Purchase Price + Interest	Weighted Average	1.10	0%					10:58 AM 02/07/2017	
+ Add an Asset Subtype Rule										
Asset Subtype	Fuel Type	ESL (Mo)	ESL (Mi)	Repl. Cost	Cost FY	Replace New	Replace Leased	Replace With	Replace Fuel Type	ESL Used (Mo)
Bus Std 40 FT	144	500,000	\$0	FY 17-18	✓					48
Bus Std 35 FT	144	500,000	\$0	FY 17-18	✓					48
Bus 30 FT	120	350,000	\$0	FY 17-18	✓					48
Bus < 30 FT	72	150,000	\$0	FY 17-18	✓					48
Bus School	144	300,000	\$0	FY 17-18	✓					48
Bus Articulated	144	500,000	\$0	FY 17-18	✓					48
Bus Commuter/Suburban	144	500,000	\$0	FY 17-18	✓					48
Bus Intercity	144	500,000	\$0	FY 17-18	✓					48
Bus Trolley Std	144	500,000	\$0	FY 17-18	✓					48
Bus Trolley Articulated	144	500,000	\$0	FY 17-18	✓					48
Bus Double Deck	144	500,000	\$0	FY 17-18	✓					48

You can add an Asset Type Rule by selecting the option in the Actions dropdown. Selecting that option will display the following dialog box.

Figure 78 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

Asset Type	New Type	
New Asset Type Name	New Asset Subtype Description	
* Service Life Calculation Type	* Replacement Cost Calculation Type	Condition Rollup Calculation Type
Age Only	Replacement Cost	Weighted Average
* Annual Inflation Rate	* Pcnt Residual Value	* Condition Rollup Weight
1.1	0	0
Save	Cancel	

You can edit the Asset Type Rule for a specific asset, by clicking on the edit icon as depicted below.

Figure 79 Edit Icon



Clicking edit on an “Asset Type Rule” will display a dialog box, allowing you to modify the Asset Policy Rule.

Figure 80 Modify Asset Policy Rule**Modify Rule: IT Equipment**

* Service Life Calculation Type * Replacement Cost Calculation Type Condition Rollup Calculation Type

* Annual Inflation Rate * Pct Residual Value * Condition Rollup Weight

The Asset Subtypes that are displayed will correspond to the Asset Type tab. The available Asset Subtype rules are the same as the Subtypes in your inventory. The estimated service life information at the Asset Subtype level describes the asset and its expected lifespan.

Figure 81 Asset Type and Asset Subtype rules

Revenue Vehicles Stations/Stops/Terminals Support Facilities Support Vehicles Maintenance Equipment Facility Equipment IT Equipment Office Equipment

Asset Subtype Rules

Asset Subtype	Fuel Type	ESL (Mo)	ESL (M)	Repl. Cost	Cost FY	Replace New	Replace Leased	Replace With	Replace Fuel Type	ESL Used (Mo)
Bus Std 35 FT	DF	144	500,000	\$0	FY 17-18	✓				48
Bus Std 35 FT	BD	144	500,000	\$0	FY 17-18	✓				48
Bus Std 35 FT	HD	144	500,000	\$0	FY 17-18	✓				48
Bus 30 FT	DF	120	350,000	\$0	FY 17-18	✓				48
Bus < 30 FT	DF	60	150,000	\$0	FY 17-18	✓				48

Service Life Calculation Method Repl. Cost Calculation Method Condition Rollup Calculation Method Annual Inflation Rate Pct Residual Last Updated
Age and Mileage Purchase Price + Interest Weighted Average 1.10 0% 10:41 AM 09/10/2016

If you click the add an “Asset Subtype Rule” button, you will be able to create a new entry.

Figure 82 Add an Asset Subtype Rule Icon

Select or fill out each text box in the Add an Asset Subtype dialog box to create a new rule. Click the “Save” button when you are satisfied with your entries.

Figure 83 Add an Asset Subtype Rule Dialog

Add an Asset Subtype Rule

Replacement

Asset Subtype

New Subtype

New Asset Subtype Name

New Asset Subtype Description

* ESL (Mo) * Replacement Cost * Cost FY
0 \$ 0 FY 18-19 Replace With New
 Replace With Leased

Fuel Type * ESL (Mi) * ESL Used (Mo) Lease Length Months
0 0

Replace Asset Subtype Replace Fuel Type

* Purchase Replacement Code * Lease Replacement Code * Purchase Expansion Code * Lease Expansion Code

* Engineering Design Code * Rehabilitation Code

Save **Cancel**

Clicking the Edit icon will bring up a dialog box to modify an Asset Subtype Rule.

Figure 84 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade

Replacement

* ESL (Mo) * Replacement Cost * Cost FY
1200 \$ 0 FY 18-19 Replace With New
 Replace With Leased

* ESL Used (Mo) Lease Length Months
0 0

* Purchase Replacement Code * Lease Replacement Code
12.22.06 12.26.06

* Engineering Design Code * Construction Code * Rehabilitation Code
12.21.06 12.23.06 12.24.06

Save **Cancel**

You also can choose to delete an asset subtype rule when the icon is displayed. You will be prompted with a dialog box before this action is taken!

Figure 85 Remove Asset Subtype Rule

Are you sure you want to remove this rule? The action cannot be undone!

Cancel **Yes**

6.2 TAM Policy

TAM Policies are used to set Useful Life Benchmark (ULB), Transit Economic Requirements Model (TERM), and Performance Measure Percent targets for asset categories on an annual basis. The TAM Policy will be used to conduct performance calculations for the NTD A-90 report. Ideally, TAM Policies should be set at the beginning of an NTD Reporting year (e.g., July–June, October–September, or January–December). Organizations can be grouped by a common characteristic, and policies can be distributed through the group.

Figure 86 TAM Policy Dropdown Menu Selection

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Dollar Sign, and a globe. Below the navigation bar is a main content area divided into several sections. On the left, there is a table titled "Asset Summary" showing data for various asset types like ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, etc. In the center, there is a section titled "Policies" with links to "Capital Projects", "Project Planner", and "SOGR Capital Project Analyzer". To the right of this is a table titled "Asset Replacement/Rehab" with columns "Num. Projects" and "Cost". An orange callout bubble points to the "TAM Policy" link in the "Policies" section, with the text "TAM Policy Selection" inside. On the far right, there is a sidebar with sections for "No notice:", "My Mess", "New", "E", "Perform", and "E".

The first step in the creation of a TAM Policy, is to Add a New Policy Year, followed by creating groups. These initial steps can only be completed on the Group Management tab, which is only accessible by users with the TAM Group Manager or Admin permission.

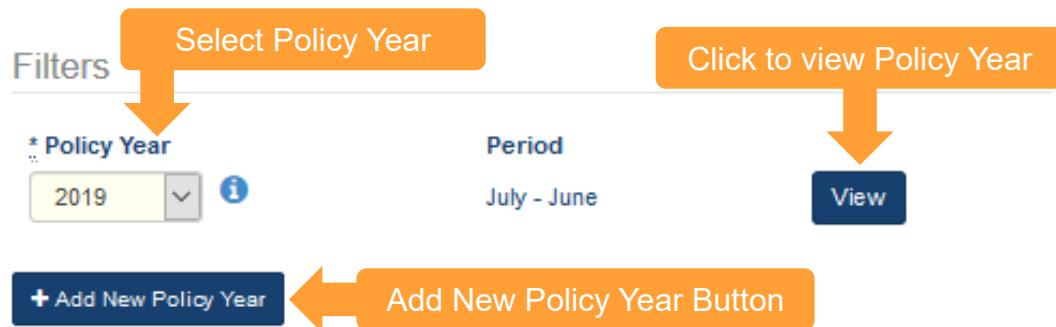
Figure 87 TAM Policy Group Management

The screenshot shows the "Group Management" tab selected under the "TAM Policy" section. At the top, there is a header with a search bar, a "All" button, and a user icon. Below the header, the URL is "Home > Policies > TAM Policy > Group Management". The main content area is titled "TAM Policy" and contains a "Group Management" tab. Below the tab, there is a "Filters" section with a "Policy Year" dropdown set to "2019", a "Period" dropdown set to "July - June", and a "View" button. An orange callout bubble points to the "Group Management" tab, with the text "Group Management tab" inside. At the bottom left, there is a "Add New Policy Year" button.

Select a Policy Year that you wish to view and click the “View” button. If a Policy Year does not exist or you need to create a policy for a new year, click the “Add New Policy Year” button and select the TAM Policy

year you wish to create. The Period will populate based on individual client reporting period, based on initial system configuration. Below the Policy Year Filter, Group Management is performed on the chosen Policy Year.

Figure 88 TAM Policy Year



If you select the “Add New Policy Year” button, a dialog box will appear and the year selection will default to the next available year. If there are no existing Policy Years, the current year will be available. If there is an existing Policy Year, you will have the option to Copy Groups From Previous Policy Year.

Figure 89 Add New TAM Policy Year

The dialog box is titled 'TAM Policy' and has a close button 'X'. It contains a header 'Add New Policy Year'. Below it is a form with fields: '* Policy Year' (set to '2022'), 'Period' (set to 'July - June'), and a checkbox '* Copy Groups From Previous Policy Year' which is checked. There are two radio buttons: 'Yes' (unchecked) and 'No' (checked). At the bottom are 'Save' and 'Cancel' buttons. A callout box with a light blue background and rounded corners contains the text: 'Copying groups from the previous year, will save you the effort of recreating groups and performance measures'.

Once a new year has been created or you filtered for an existing year, the Policy Year that you have chosen will display all available groups below. If you have created a new Policy Year, and did not copy from the previous year, you will need to create new groups.

Figure 90 Group Management Period and Year

Group Management : 2019 : July - June



Group Name	TAM Group Lead	Organizations	Asset Categories	Status
test	Nicholas Baldwin	View	Revenue Vehicles Equipment Facilities	Distributed
Section 5310 TAM	Elizabeth Bonini	View	Revenue Vehicles Equipment Facilities	Distributed
Section 5311	Elizabeth Bonini	View	Revenue Vehicles Equipment Facilities	Distributed

You may click the “Add Group” button to add a new Group for that Policy Year.

Figure 91 Add Group Button

In order to create a new TAM Policy Group, you will name the group in Name and select the user that will be the TAM Group Lead. Next, select the applicable organizations to associate with the new TAM Group.

Figure 92 Add TAM Group Dialog

TAM Group

Add Group

* Name	* TAM Group Lead
<input type="text"/>	<input type="text"/>

Not Selected

Search...

- BARTA-Berks Area Regional Transportation Authority
- BCT-Bucks County Transport, Inc.
- BCTA-Beaver County Transit Authority
- BMC-Borough of Mt Carmel
- BSS-Blair Senior Services, Inc.
- BTA-Butler Transit Authority
- BUTLER-Butler County Community Public Transportation
- CARBON-Carbon County
- CARS-Call-A-Ride Service, Inc.
- CAT-Cumberland-Dauphin-Harrisburg Transit Authority
- CATA*-Centre Area Transportation Authority
- CCTA-Cambria County Transit Authority

Selected

*** Asset Categories**

Once you have made the proper selections, you will need to move the selected organizations to Selected by clicking on the arrows.

Figure 93 Add TAM Group Dialog
With Selections

The screenshot shows the 'Add Group' dialog for a 'TAM Group'. At the top, there are fields for 'Name' (My New Group) and 'TAM Group Lead' (Elizabeth Bonini). Below these are two lists: 'Not Selected' and 'Selected'. The 'Not Selected' list contains a scrollable list of organizations. The 'Selected' list is currently empty. An orange callout bubble with the text 'Click the arrows to add or remove organizations' points to the right-pointing arrow between the two lists.

Name	TAM Group Lead
My New Group	Elizabeth Bonini

Not Selected

Search...
BARTA-Berks Area Regional Transportation Authority
BCT-Bucks County Transport, Inc.
BCTA-Beaver County Transit Authority
BMC-Borough of Mt Carmel
BSS-Blair Senior Services, Inc.
BTA-Butler Transit Authority
BUTLER-Butler County Community Public Transportation
CARBON-Carbon County
CARS-Call-A-Ride Service, Inc.
CAT-Cumberland-Dauphin-Harrisburg Transit Authority
CATA-Centre Area Transportation Authority
CCTA-Cambria County Transit Authority

Selected

Choose All > < Clear All

*** Asset Categories**

Save Cancel

Select the Asset Categories you wish to include in the TAM Policy Group you are creating. Please note, the listed Asset Categories only appear upon selecting organizations and if those organizations have those asset categories saved within their inventory. Click “Save” when Satisfied with your selection.

Figure 94 Add TAM Group
Selections, Asset Categories

The screenshot shows the 'Add Group' dialog for a 'TAM Group'. At the top, there are fields for 'Name' (My New Group) and 'TAM Group Lead' (Elizabeth Bonini). Below these are two lists: 'Not Selected' and 'Selected'. The 'Not Selected' list contains a scrollable list of organizations. The 'Selected' list contains three organizations: BCT-Bucks County Transport, Inc., BTA-Butler Transit Authority, and CAT-Cumberland-Dauphin-Harrisburg Transit Authority. An orange callout bubble with the text 'Asset Categories' points to the checkbox section below the lists.

Name	TAM Group Lead
My New Group	Elizabeth Bonini

Not Selected

Search...
BARTA-Berks Area Regional Transportation Authority
BCTA-Beaver County Transit Authority
BMC-Borough of Mt Carmel
BSS-Blair Senior Services, Inc.
BUTLER-Butler County Community Public Transportation
CARBON-Carbon County
CARS-Call-A-Ride Service, Inc.
CATA-Centre Area Transportation Authority
CCTA-Cambria County Transit Authority
CHESSR-Chester County BPT
CLARCO-Clarion County
CNTRCO-Centre County

Selected

BCT-Bucks County Transport, Inc.
BTA-Butler Transit Authority
CAT-Cumberland-Dauphin-Harrisburg Transit Authority

*** Asset Categories**

Revenue Vehicles
 Equipment
 Facilities

Choose All < Clear All

Save Cancel

Once the new group is created, the Status is set to Inactive. You have the option to edit, delete or Generate that Group. Click “Generate” when you are ready to proceed and you will notice that the group Status will

change to In Development. Clicking the “Generate” button adds the group to the Group Metrics tab, so the assigned TAM Group Lead can start the process of setting performance measures and editing rules for all organizations within the group. The Group Management tab, is only viewable and editable by users with the TAM Group Manager or Admin permission, and TAM Group Leads who can only access groups to which they have been assigned.

Figure 95 TAM Group Mangement Status

Group Management : 2022 : July - June

+ Add Group

Group Name	TAM Group Lead	Organizations	Asset Categories	Status
New Group	Lydia Chang	View	Revenue Vehicles Equipment Facilities	Inactive
5311	Nicholas Baldwin	View	Revenue Vehicles Equipment Facilities	Distributed

Generate

Newly created and previously existing TAM Groups will appear in the Group Metrics tab of TAM Policy. Select the Policy Year and Group Name you wish to work with from the selection menu and click the “View” button.

Figure 96 TAM Policy Group Metrics

Capital Planning Tool (QA) [Home](#) [Policies](#) [TAM Policy](#) [Group Metrics](#) [?](#)

TAM Policy

Group Management **Group Metrics** Performance Measures

Filters

* Policy Year: 2021 [i](#) Period: July - June * Group Name: New Group [View](#)

Select Policy Year, Group Name and click View

Metrics can be set for each asset category, by selecting the category you wish to edit in the Asset Category dropdown. Assets can be set to locked or editable. Locked assets cannot be changed in the Performance Measures tab for each organization within that group. If you leave any asset as editable, then each organization in that group can modify the metrics within the Performance Measures tab.

Figure 97 Editable and Locked Assets

Asset Category	Group Name	Group Status	Organizations	Copied From Previous Year
Revenue Vehicles	New Group	In Development	View	No
Revenue Vehicles				
Percentage of revenue vehicles that exceed the Useful Life Benchmark (ULB)				
Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
BU-Bus	14	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Locked
CU-Cutaway	10	<input checked="" type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable
OR-Other	0	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Locked
VN-Van	8	<input checked="" type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable

The TAM Policy Group Lead should edit Useful Life Benchmark (ULB), Goal Percent (Goal Pcnt), or other applicable asset metrics as necessary. Fields can be edited by clicking directly on the value in the field, and clicking the checkmark box. Editable/Locked toggles automatically save any changes made.

Figure 98 Asset Type Percentage Settings

Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	<input checked="" type="checkbox"/> Editable	10	<input checked="" type="checkbox"/> Editable
BU-Bus	14	<input checked="" type="checkbox"/> Editable	20	<input checked="" type="checkbox"/> Editable
CU-Cutaway	10	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
OR-Other	0	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
VN-Van	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable

Once completed, click the “Distribute” button to push the group metrics over to the Performance Measures tab for each organization within the group. Each group within a Policy Year can be distributed on an individual basis. If all the Editable/Locked toggles were in a state of “Locked” for every asset within each Asset Category for a group, the status for each organization’s Performance Measures will automatically update to Active status. If at least one Editable/Locked toggle is in a state of “Editable,” each organization will need to manually Activate the metrics on the Performance Measures tab.

Figure 99 Distribute TAM Policy

TAM Policy

Group Management Group Metrics Performance Measures

Filters

* Policy Year: 2018 Period: July - June * Group Name: New Group View

Distribute

Group Metrics : 2018 : July - June : New Group

Asset Category	Group Name	Group Status	Organizations	Copied From Previous Year
Revenue Vehicles	New Group	In Development	View	No

Revenue Vehicles

Percentage of revenue vehicles that exceed the Useful Life Benchmark (ULB)

Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	Editable	10	Editable
BU-Bus	14	Editable	20	Editable
CU-Cutaway	10	Editable	25	Editable
OR-Other	0	Locked	10	Locked
SV-Sports Utility Vehicle	8	Editable	10	Editable
VN-Van	8	Editable	10	Editable

Notice that the group that has been distributed shows Status: Distributed.

Figure 100 Distributed TAM Policy

Capital Planning Tool (QA) Home Bus Line Graph \$ Bar Graph Help

TAM Policy

Group Management Group Metrics Performance Measures

Filters

* Policy Year: 2018 Period: July - June View

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

Group Name	TAM Group Lead	Organizations	Asset Categories	Status
Group 5311	Elizabeth Bonini	View	Revenue Vehicles Equipment Facilities	In Development
Group 5310	Elizabeth Bonini	View	Revenue Vehicles Equipment Facilities	In Development
Example Group	Elizabeth Bonini	View	Revenue Vehicles Equipment Facilities	In Development
New Group	Lydia Chang	View	Revenue Vehicles Equipment Facilities	Distributed

Group Status

The Performance Measures tab will detail the Useful Life Benchmark, TERM value, and Goal Percent Values that have been distributed to each organization within the group. Individual organizations users will only be able to view or edit the Performance Measures tab, and only for organizations to which the user belongs.

Figure 101 TAM Policy Performance Measures

TAM Policy

Group Management Group Metrics **Performance Measures**

Performance Measures

Filters

* Policy Year: 2021 Period: July - June * Group Name: * Organization:

Performance Measures

TAM Groups for 2021 : July - June haven't been distributed yet.

To view an organizations Performance Measures, select the correct Policy Year, Group Name, and Organization and click the “View” button.

Figure 102 Policy Year Filters

Filters

* Policy Year: 2018 Period: July - June * Group Name: New Group * Organization: BCTA-Beaver County Transit Authority

Performance Measures : 2018 : July - June : New Group : BCTA

Activate

You can select the Asset Category that you wish to view by selecting from the Asset Category dropdown. You can adjust each ULB, TERM value (for Facilities only) or Goal Percent (Goal Pcnt) based on your organization's need. Any Asset Class/Type that is Locked will not be editable.

Figure 103 Asset Type Percentage Settings

Asset Category	Group Name	Agency Status		
Revenue Vehicles	New Group	Pending Activation		
Revenue Vehicles				
Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	Editable	10	Editable
BU-Bus	14	Editable	20	Editable
CU-Cutaway	10	Editable	25	Editable
OR-Other	0	Locked	10	Locked
SV-Sports Utility Vehicle	8	Editable	10	Editable

Select the “Activate” button when you are satisfied with the Performance Measures shown. If all of the Editable/Locked toggles were in a state of “Locked” for every asset within each Asset Category, you do not need to Activate the Performance Measures, as they changed to an Active status upon distribution to the Performance Measures tab.

Figure 104 Activate Performance Measures

TAM Policy

Group Management	Group Metrics	Performance Measures
Filters * Policy Year: 2018 Period: July - June * Group Name: New Group * Organization: BCTA-Beaver County Transit Authority View Activate		
Performance Measures : 2018 : July - June : New Group : BCTA		
Asset Category: Facilities	Group Name: New Group	Agency Status: Pending Activation
Facilities Asset Class/Type: Passenger TERM: 3 Editable/Locked: Editable Goal Pcnt: 0 Editable Parking TERM: 3 Editable/Locked: Editable Goal Pcnt: 0 Editable		



7.0 Projects

An organization creates a capital project when they want to replace their assets or expand their inventory. Each capital project is composed of one or more building blocks, referred to as Activity Line Items (ALI), and is associated with one or more fiscal years. To frame it differently, ALIs should be considered a funding request for a project and each project can have one or more funding requests in a single year or across multiple years. A Capital Project generally falls into one of two categories:

- Projects that use the Asset Replacement/Rehabilitation policy information to replace existing assets to keep assets in a state of good repair. These are known as State of Good Repair (SOGR) projects.
- Projects that acquire new assets that enable you to provide new or expanded services or accomplish new business functions.

All projects created in the system will be listed in the Capital Projects table.

The SOGR projects will automatically be generated by running the State of Good Repair Project Analyzer, which is covered in the project planning section, so we'll quickly review how to create a new capital project manually.

Figure 105 Capital Projects Table

Capital Projects

Plan Summary		Capital Needs Chart												
		FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30	
		\$956,840,985	\$333,276,552	\$108,838,201	\$78,408,870	\$125,370,978	\$179,853,327	\$188,491,652	\$100,343,480	\$256,308,134	\$169,519,292	\$406,353,547	\$180,491,802	
+ New Capital Project														
Agency	FY	Project	Scope	Emgcy	SOGR	Shadow	Multi Year	Type	Title	Cost	State	Federal	Local	Total
ACTS	18-19	ACTS 18-19 #3990	111	✓				R	Bus: Revenue Rolling Stock: Purchase - Replacement project	\$204,000	\$0	\$0	\$0	\$0 ⓘ
								E	Mobile Vehicle Lifts	\$26,000	\$0	\$0	\$0	\$0 ⓘ
								R	Bus: Support Facilities and Equipment: Acquisition project	\$139,500	\$146	\$0	\$4,647	\$4,793 ⓘ
								R	Bus: Station Stops/Terminals: Acquisition project	\$23,500	\$0	\$0	\$784	\$784 ⓘ
AMTRAN	FY 18-19	AMTRAN 18-19 #5680	111					I	VOH of Hybrid Electric Gilligs	\$975,000	\$0	\$0	\$32,497	\$32,497 ⓘ
AMTRAN	FY 18-19	AMTRAN 18-19 #5681	114					I	Admin Building Security Upgrades	\$25,000	\$0	\$20,000	\$167	\$20,167 ⓘ
AMTRAN	FY 18-19	AMTRAN 18-19 #5907	111					R	test	\$124,100	\$0	\$0	\$0	\$0 ⓘ

Clicking new capital project will bring you to the new project interface.

Figure 106 New Capital Project

New Capital Project

* Organization

* Title
Enter a title for this project...
64 characters remaining

Project Locations
PennDOT District 1 (District)
PennDOT District 2 (District)
PennDOT District 3 (District)
PennDOT District 4 (District)

* Fiscal Year
FY 18-19

* Scope

* Project Type
Replacement

Emergency project
 Multi year project

* Description
254 characters remaining

* Justification
254 characters remaining

Filling in the required information will bring you to the capital projects detail screen, where you can see detailed information about a capital project and add ALIs and other details.

Figure 107 Capital Project Details

Capital Planning Tool (QA)

Home > Capital Projects > AMTRAN 18-19 #6087

Capital Project AMTRAN 18-19 #6087 was successfully created.

Project Number	AMTRAN 18-19 #6087	Actions	Description	Activity Line Items (0)	Supporting Documents (0)	Comments (0)
Fiscal Year	FY 18-19		Project Description			
Scope	125		test			
Total Cost	\$0		test			
Type	Replace		Project Justification			
SOGR	No					
Shadow	No					
Multi year	No					
Emergency	No					

Project Locations: Senate District 30 (Senate)

For manually created capital projects, you can add ALIs from the capital project details screen. Click the “Activity Line Items” tab in the additional details, then click the “Add Line Item” button.

Figure 108 Add an ALI

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Projects, Reports, Budget, and Tools. Below it, a breadcrumb trail shows 'Home > Capital Projects > AMTRAN 18-19 #6126'. A green message box says 'Capital Project AMTRAN 18-19 #6126 was successfully created.' On the left, a 'Manual Capital Project' card displays project details: Project Number AMTRAN 18-19 #6126, Fiscal Year FY 18-19, Scope 111, and Total Cost \$0. To the right, tabs for Description, Activity Line Items (with a count of 0), Supporting Documents (0), and Comments (0) are visible. A large orange arrow points from the text 'From the window that appears, you can specify ALI details.' to the '+ Add Line Item' button, which is highlighted with a yellow rounded rectangle.

From the window that appears, you can specify ALI details.

Figure 109 Add an ALI Details

This screenshot shows the 'AMTRAN 18-19 #6126: New Activity Line Item' dialog box. It contains several input fields: 'Category' (dropdown), 'TEAM ALI Code' (dropdown), 'Cost Estimate' (\$ dropdown), 'Fiscal Year' (FY 18-19 dropdown), 'Replace with New' (radio buttons for Yes or No), 'Count' (dropdown), 'Fuel Type' (dropdown), 'Length' (dropdown), and 'Name' (text input). At the bottom are 'Create Activity Line Item' and 'Cancel' buttons. The background shows the same Capital Planning Tool interface as Figure 108, with the 'Activity Line Items' tab selected and a message about a successful project creation.

Add the required details, then click “Add Activity Line item” to finalize. All manually created projects will automatically appear on the Project Planner.

8.0 Project Planning

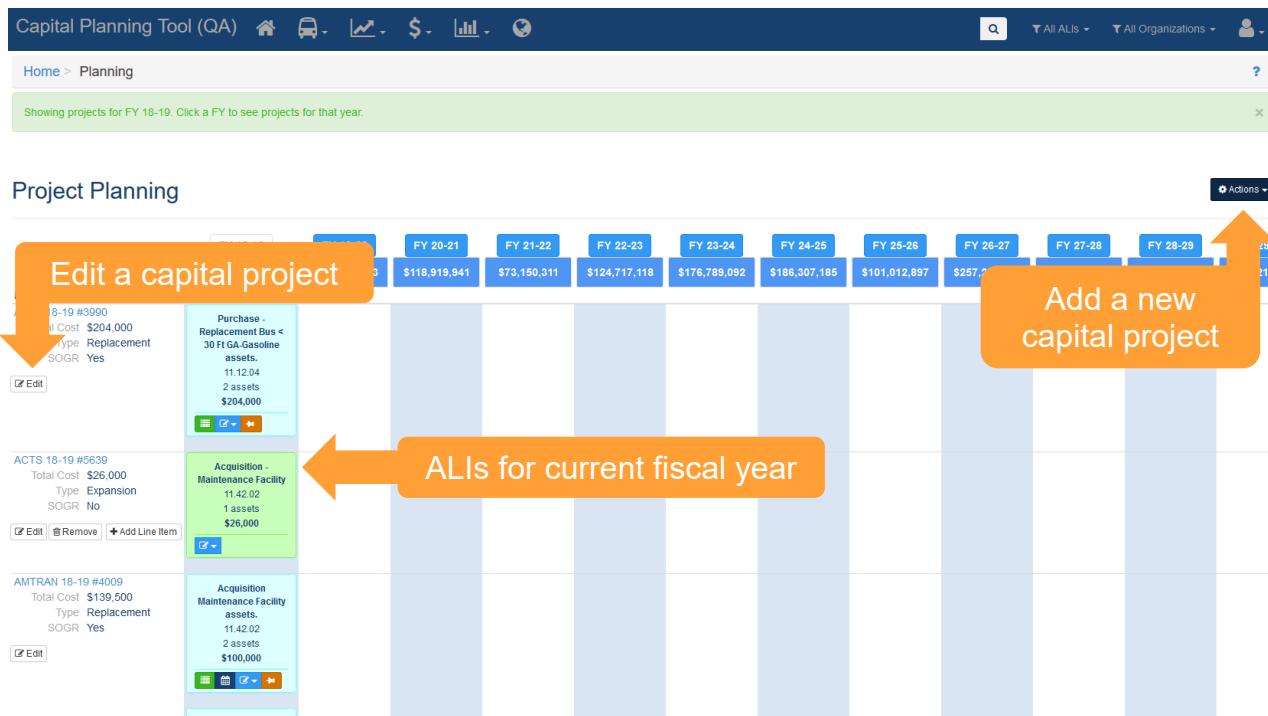
8.1 Project Planner

The project planner is a single interface to perform project and funding request (ALI) prioritization for a multiyear horizon, functioning as a decision support tool. The project planner allows individual organizations to manage their own projects and ALI requests, while parent organizations can view data for all associated child agencies. Users can view and edit projects and ALIs in one view and reallocate assets and ALIs as needed in an interactive table.

Different project types are identified by the color of the ALI. SOGR projects are blue in color, and manually created capital projects are green in color. Shadow projects are projects that are meant to replace an SOGR project that is listed in an earlier year within the timeframe of the project planner (e.g., scheduling replacement of assets that currently are scheduled to be replaced); these ALIs are purple in color.

Users can filter ALIs for different years by clicking at the top of each column to bring the corresponding ALIs for that year to the top of the page. Users also can add a new manual capital project directly from the project planner as well as edit existing projects by clicking on the “Edit” button on the left-hand side of the planner.

Figure 110 Project Planner Interface



Both projects and ALIs within projects can be modified using multiple methods.

Manually created capital projects can be removed completely and can have additional ALIs added. These actions can be completed by clicking on the “Remove” button or the Add Line Item button on the left-hand side of the planner. ALI details can be viewed or edited by clicking on the icons within each ALI that is included as part of a manually created project.

Figure 111 Edit Manually Created Capital Projects

The screenshot shows the Capital Planning Tool (CPT) interface. At the top, there's a navigation bar with icons for Home, Planning, and various filters. Below it, a message says "Showing projects for FY 18-19. Click a FY to see projects for that year." The main area is titled "Project Planning" and features a grid of projects. Each project row has a summary box at the top left and a detailed view box below it. The summary box contains project ID, total cost, type, and SOGR status. The detailed view box shows specific assets and their details. Two callout boxes with arrows point to specific features: one pointing to the "Edit" and "Remove" buttons in the project summary box, and another pointing to the "Edit ALI cost, milestones, view funding data, or remove an ALI" button in the detailed view box.

	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
Project	\$946,561,897	\$335,781,113	\$118,919,941	\$73,150,311	\$124,717,118	\$176,789,092	\$186,307,185	\$101,012,897	\$257,203,755	\$174,267,299	\$396,952,612	\$190,215
ACTS 18-19 #3990 Total Cost: \$204,000 Type: Replacement SOGR: Yes	Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.42.04											
ACTS 18-19 #3999 Total Cost: \$5,000 Type: Expansion SOGR: No	Acquisition - Maintenance Facility 11.42.02 1 assets \$26,000											
AMTRAN 18-19 #4009 Total Cost: \$139,500 Type: Replacement SOGR: Yes	Acquisition - Maintenance Facility assets. 11.42.02 2 assets \$100,000											

SOGR projects and ALIs include buttons and icons providing users the ability to view assets associated with the SOGR projects, remove the assets from the ALI or move the associated assets to a different year, edit cost, update milestones, view funding information and pin an ALI to the project planner. Pinning an ALI allows users to rerun the SOGR Capital Project Analyzer, without altering any of the details of the pinned ALI.

Figure 112 Edit SOGR Capital Projects

Project

ACTS 18-19 #3990
Total Cost \$204,000
Type Replacement
SOGR Yes

Maintenance Facility
11.42.02
1 assets
\$26,000

AMTRAN 18-19 #4009
Total Cost \$139,500
Type Replacement
SOGR Yes

Acquisition Maintenance Facility assets.
11.42.02
2 assets
\$100,000

Edit SOGR project details

Edit ALI assets, update cost, milestones, view funding data, remove an ALI and pin ALIs

All projects in the project planner can be prioritized by moving ALIs to different years within the project planner, which can be achieved by using the drag and drop method. Prioritization of projects also can be achieved by removing or moving assets within an ALI to different years.

Figure 113 Prioritize Projects
Move ALIs to Different Years

Capital Planning Tool (QA)

	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
Project	\$833,519,020	\$308,302,216	\$116,603,350	\$78,344,343	\$126,448,962	\$179,162,099	\$181,436,144	\$100,488,208	\$267,268,514	\$175,681,481	\$394,858,694	\$197,505,958

ACTS 22-23 #6022
Total Cost \$660,407
Type Replacement
SOGR Yes

AMTRAN 22-23 #4019
Total Cost \$41,056
Type Replacement
SOGR Yes

AMTRAN 22-23 #4026
Total Cost \$796
Type Replacement
SOGR Yes

Purchase - Replacement Bus < 30 Ft GA-Gasoline assets.
11.42.04
2 assets
\$660,407 (e)

Acquisition Shop Equipment assets.
11.42.06
3 assets
\$7,387 (e)

Acquisition ADP Software assets
11.42.08
2 assets
\$1,074 (e)

Acquisition Miscellaneous Equipment assets.
11.42.20
5 assets
\$31,695 (e)

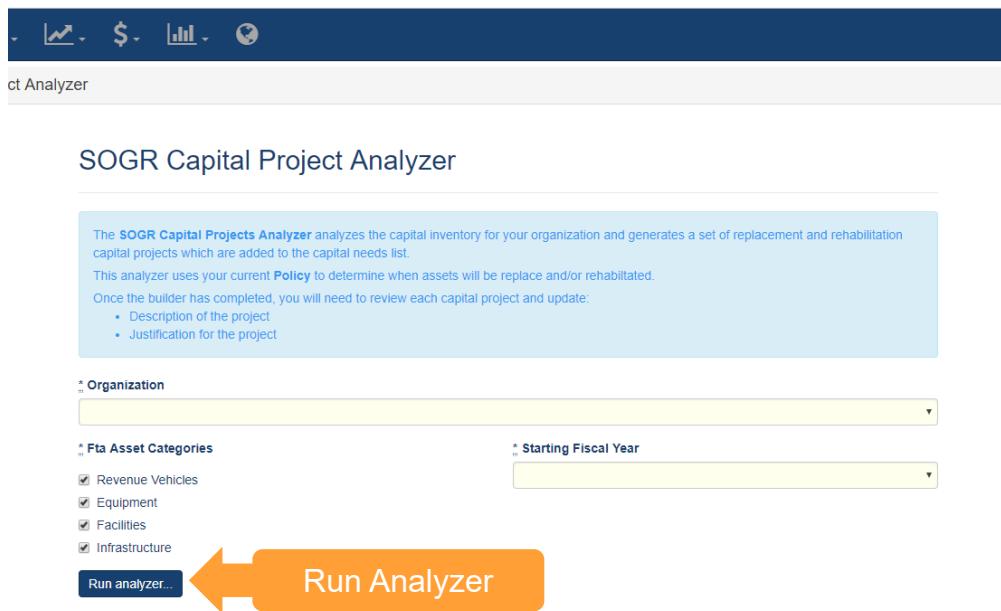
Acquisition Surveillance/Security Systems assets
11.32.07
1 assets
\$100 (e)

Move to FY 26-27

8.2 State of Good Repair (SOGR) Capital Project Analyzer

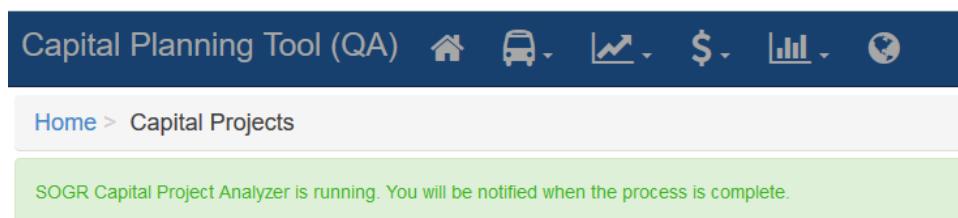
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates a set of replacement capital projects for a 12-year planning horizon. Before you run the analyzer, you can select which organization, what asset categories, and what year should serve as the starting year for project creation.

Figure 114 Running SOGR Capital Project Analyzer



Clicking “Run Analyzer” will begin the SOGR job which will run in the background and you’ll be redirected to the Capital Projects page. The system will provide a notification (in your notifications drawer at the top of the screen) when complete.

Figure 115 SOGR Capital Project Analyzer Processing

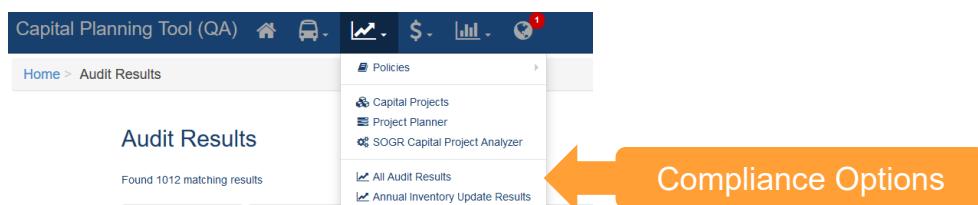


9.0 Compliance

The Audit Feature is used to organize and notify organizations of audit requests to assist with oversight of asset updates that must be conducted on a periodic basis. As an example, you may establish a rule where all assets need to have Service Status, Condition, and Mileage (where appropriate) updated every year. These rules can be setup within the Audit Feature. When the audit is run on, the system will check that each asset has had its Service Status, Condition, and Mileage (where appropriate) updated within a given date range.

Clicking “All Audit Results” or “Annual Inventory Update Results” will bring you to an overview of the audit process.

Figure 116 Compliance Options



From this screen you can filter and export the results of the audit to quickly find the most relevant information. Filters can be applied on the type of asset or pass/fail status.

Figure 117 Audit Results

Org	Audit	Asset Tag	Description	Result	Updated At
CCTA	Annual Inventory Update	Revenue Vehicles 105	GIL Low Floor	failed	03/30/2018
CATA*	Annual Inventory Update	Revenue Vehicles 305	CMD Express 3500	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 306	FRD E350	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 307	FRD E350	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 401	FRD E450	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 402	FRD E450	failed	03/30/2018

Revenue Vehicles failed Annual Inventory Update

Remember to check the appropriate boxes to export the rows you desire

10.0 Funding

Organizations can establish and manage pools of funds, through the creation and management of Programs, Templates, and Buckets. You can allocate these funds to projects (or, more accurately, to ALIs) to develop a long-term funding plan and see where additional funds might be needed.

When working with a parent organization that administers funds (like a State DOT or planning partner), you can collaborate to ensure that Federal, State, and Local funds are used in the best way possible to meet your needs.

There are many types of funds available, including formula and discretionary funds, funds that are only available to certain organizations or for certain purposes, and funds that are controlled or administered by one organization on behalf of another. Funds are generally identified by the name of the funding program and the year in which the funds were, or will be, granted. For each fund, the system tracks the dollar amount that is available, the dollar amount that has been committed to future projects, and the remaining balance.

If you work for an organization, some funds will be made available to you by a parent organization (depending on your system configuration). In addition, you can add local funds to pay for a specific project or group of assets you intend to purchase.

10.1 Programs

Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting the “Add Funding Program” link.

Figure 118 Available Funding Programs

The screenshot shows the CPT interface with the following details:

- Header:** Capital Planning Tool (QA) with navigation icons for Home, Back, Forward, Chart, and Search.
- Left Sidebar:** Home > Funding Programs > All. Includes links for Add Funding Program, Any Source..., Show Active Program, and a search bar.
- Main Content:** A table listing funding programs:

Name	Source	Type	Amount
1514 Bond	State	Discretionary	0.00
1514 Discretionary	State	Discretionary	0.00
1516	State	Discretionary	0.00
1517	State	Formula	0.00
5307	Federal	Formula	0.00
5308	Federal	Discretionary	0.00
5309	Federal	Discretionary	0.00
5310	Federal	Discretionary	0.00
5311	Federal	Formula	0.00
5316	Federal	Discretionary	0.00
5317	Federal	Discretionary	0.00
5324	Federal	Discretionary	0.00
- Top Right:** A dropdown menu titled "Add Funding Program" with options: Programs, Templates, Local, Fund Projects, Bond Requests, Status, Import/Export.
- Right Side:** A "Port Match" table showing port numbers and their status (100.00%, 80.00%, etc.) with green and red checkmarks.
- Bottom Callouts:**
 - An orange arrow points to the "Add Funding Program" button in the top right of the main content area.
 - An orange callout box labeled "Available Funding Programs" points to the "Port Match" table on the right.

Clicking on an individual program will give you specific details about that program, like Templates, Buckets, Assets that were funded by the selected program, as well as other pertinent information such as documents, comments, and program details.

Figure 119 Funding Program Details

The screenshot shows the Capital Planning Tool (CPT) interface. At the top, there's a navigation bar with icons for Home, Programs, Reports, Budgets, and Assets. Below that, a breadcrumb trail shows 'Home > Funding Programs > 5307'. The main content area is divided into two panels. The left panel contains a summary of the program: Type (Federal), Formula (checked), Inflation Rate (0.000%), Pct Match (80.000%), and Life of \$ (years) (5). The right panel is titled 'Details' and includes tabs for Details, Templates (2), Buckets (21), Assets (827), Documents (0), and Comments (0). An orange callout box with the text 'Additional Program Information' has an arrow pointing to the 'Templates' tab.

10.2 Templates

Templates are the governing rules applied to Programs, and are used to create a structure for funding Buckets. Multiple Templates may be created for a single Program. A Template defines which organizations can use a Program, and how they may create Buckets. In addition, the following rules can be managed:

- Contributor: Designation of organization who provides funds for the Bucket.
- Owner: Designation of organization who can allocate funds to ALIs from the Bucket.
- Bucket Parameters: Designation of single year or multiyears of funding for a Bucket, designation of one or more organizations to use the Bucket for a single year, or to allow the creation of multiple Buckets for a single organization for a single year.
- Percent Match: Designation of the percent of funding that can be allocated to a single ALI from the Bucket that will be created (defaults to values set in the associated Program).
- Project Type Use: Designation of types of projects that funding can be allocated to from the Buckets that are created using the template.

Figure 120 Available Templates

Program	Name	Contributor	Transfer	Owner	Capital	Operating	Debt Service	Other	Recurring	Pcnt Match
5310	5310 UZA Apportionment	State		State	✓	✓			✓	80.000%
5310	5310 Rural Use	State		State	✓	✓			✓	80.000%
5311	5311 Rural Apportionment	State		State	✓	✓			✓	80.000%
5311	5311 Appalachian Development	State		State	✓				✓	80.000%
5324	5324 Emergency Relief	State		Agency	✓				✓	80.000%
5337	5337 Fixed Guideway	State		Agency	✓				✓	80.000%
5339	5339 Urban	Agency		Agency	✓				✓	80.000%
5339	5339 Direct	Agency		Agency	✓				✓	80.000%
TIGER	TIGER	State		Agency	✓					80.000%
TIGGER	TIGGER	State		Agency	✓					80.000%
Flex Funds	Flex Funds	State	✓	State	✓					80.000%
CMAQ	CMAQ	Agency		Agency	✓					80.000%
1514 Bond	1514 Bond Funds - SEPTA/PAAC Owned	State		Agency	✓					96.775%
1514 Bond	1514 Bond Funds - Single Agency	State		State	✓					96.775%
1514 Bond	1514 Bond Funds - Pooled Funds	State		State	✓					96.775%
1514 Discretionary	1514 Turnpike - Agency Owned	State		Agency	✓				✓	96.775%
1514 Discretionary	1514 Turnpike - State Owned	State		State	✓				✓	96.775%
1514 Discretionary	1514 Other - Agency Owned	State		Agency	✓				✓	96.775%
1514 Discretionary	1514 Other - State Owned	State		State	✓				✓	96.775%
1514 Discretionary	1514 PTAF Debt Service	State		Agency	✓				✓	96.775%
1516	1516 CTC	State		State	✓				✓	100.000%
1516	1516 Intercity Bus	State		State	✓				✓	50.000%
1516	1516 JARC	State		State	✓				✓	100.000%
1516	1516 New Freedom	State		State	✓				✓	100.000%
1517	1517 Capital Improvements - Urban	State		Agency	✓					100.000%
1517	1517 Capital Improvements - Rural	State		Agency	✓					100.000%
Act 3 ASG	Act 3 ASG - Urban	State		Agency	✓					96.670%

Clicking an individual Template will provide more details about the template. It also can show funding Buckets assigned to that template, as well as organization eligibility.

Figure 121 Template Details

\$ 5310 UZA Apportionment		Actions
Program	5310	
Name	5310 UZA Apportionment	
Contributor	State	
Owner	State	
For	Capital	
Operating		
Recurring	✓	
Pcnt Match	80.000%	
Created On	11/17/2017	
Last Updated	11/17/2017	

Details

- Description
- Eligibility (63)
- Buckets (0)

Agencies

Type	Organization	Full Name	Full Address	Phone	Ext	Fax	Web Site
Transit Operator	ACTS	Allied Coordinated Transportation Services, Inc.	241 West Grant Street P.O. Box 189 New Castle, PA, 16103	(999) 999-9999			http://www.example.com
Transit Operator	AMTRAN	Altoona Metro Transit	3301 Fifth Avenue Altoona, PA, 16601-1801	(999) 999-9999			http://www.example.com
Transit	ATA	Area Transportation Authority of North Central	44 Transportation Center Johnsonburg, PA, 15845	(999) 999-9999			http://www.example.com
			1700 North Eleventh Street Reading, PA, 19604	(999) 999-9999			http://www.example.com
Transit Operator	DOT	Dauphin County Transport, Inc.	P.O. Box 510 Hollidaysburg, PA, 18928	(999) 999-9999			http://www.example.com
Transit	DATA	Dauphin County Transit Authority	200 West Washington Street Harrisburg, PA, 17101	(999) 999-9999			http://www.example.com

10.3 Buckets

Buckets are the most granular elements in the funding process—this is where you'll actually allocate funds to your capital projects via their ALIs. Buckets should be thought of as program-based annual budgets, which have funds available across one or multiple years, and that can be allocated to ALIs according to rules developed within the Templates. The Bucket table displays the name of the associated Program, the name

of the Bucket, ownership/control information, and funding balances of Total funds available, Committed (allocated) value, and the Available (unallocated) balance.

Figure 122 Bucket Overview

FY	Program (Template)	Name	Type	Owner	Restricted To	Total	Committed	Available	Expires	
FY 18-19	5339 (5339 Urban)	5339 Urban-LCTA-FY18/19	Federal	LCTA		\$436,257	\$452,257	\$-16,000	FY 20-21	
FY 18-19	CMAQ (CMAQ)	CMAQ-BTA-FY18/19	Federal	BTA		\$2,300,000	\$0	\$2,300,000		
FY 18-19	CMAQ (CMAQ)	CMAQ-BTA-FY18/19	Federal	BTA		\$3,000,000	\$0	\$3,000,000		
FY 18-19	5339 (5339 Urban)	5339 Urban-SCTA-FY18/19	Federal	SCTA		\$1,300,000	\$0	\$1,300,000	FY 20-21	
FY 18-19	CMAQ (CMAQ)	CMAQ-SCTA-FY18/19	Federal	SCTA		\$1,200,000	\$0	\$1,200,000		
FY 18-19	CMAQ (CMAQ)	CMAQ-LANTA-FY18/19	Federal	LANTA		\$850,000	\$850,000	\$0		
FY 18-19	Local (Local)	Local-SCTA-FY18/19-	Local	SCTA		\$100,000	\$4,095	\$95,905		
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-SCTA-FY18/19	Federal	SCTA		\$7,000,000	\$480,000	\$6,520,000	FY 22-23	
FY 18-19	Local (Local)	Local-BARTA-FY18/19-	Local	BARTA		\$100,000	\$45,612	\$54,388		
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-BARTA-FY18/19	Federal	BARTA		\$3,300,000	\$2,772,910	\$527,090	FY 22-23	
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-RRTA-FY18/19	Federal	RRTA		\$2,800,000	\$2,510,407	\$289,593	FY 22-23	
FY 18-19	Local (Local)	Local-RRTA-FY18/19-	Local	RRTA		\$100,000	\$26,684	\$73,316		
FY 18-19	CMAQ (CMAQ)	CMAQ-BARTA-FY18/19	Federal	BARTA		\$1,200,000	\$1,200,000	\$0		
FY 18-19	5339 (5339 Urban)	5339 Urban-BARTA-FY18/19	Federal	BARTA		\$370,000	\$360,205	\$9,795	FY 20-21	
FY 18-19	5339 (5339 Urban)	5339 Urban-RRTA-FY18/19	Federal	RRTA		\$930,000	\$911,196	\$18,804	FY 20-21	
Total										
Committed										
Available										
Expires										

Clicking on an individual Bucket will bring you details about that Bucket, such as a description, and which ALIs have funding allocated from the associated Bucket.

Figure 123 Bucket Details

\$ Bucket		Actions	
Template	5339 Urban	Description	Funding Line Items
Fiscal Year	FY 18-19		
Owner	LCTA		
Fund Amount	\$436,257		
Funds Committed	\$452,257		
Funds Available	\$-16,000		
Created On	02/14/2018		
Last Updated	06/01/2018		

Agency	ALI	FY	ALI Total	Bucket Allocation
LCTA	Purchase - Replacement - Bus STD 35 Ft - Compressed Natural Gas	FY 18-19	\$532,067	\$452,257

Showing 1 to 1 of 1 rows

Bucket Details

Clicking on an ALI will take you to the Fund Projects interface where you can modify how an ALI is funded.

Figure 124 Fund Projects by ALI

Line Amount	Fund	Pctn	Amount
\$532,067	Federal	85.000%	\$452,257
	State	0.000%	\$0
	Local	0.000%	\$0
	Total Funded:	85.000%	\$452,257

10.4 Grants

Management of Grants is carried out through the Grant selection on the Funding dropdown menu. The Grant module can be used to track Federal, State, and Local grant information, as well as track funding amounts by each grant for asset purchases. Grants can only be viewed and managed by users with the Grant Manager or Admin privilege.

Figure 125 Grants Dropdown

Org	Category : Class	Count	Value
ACTS	Revenue Vehicles : Buses	2.3	2
ACTS	Revenue Vehicles : Ferries	4.0	3
ACTS	Facilities : Administration	0.8	0
ACTS	Infrastructure : Track	0.0	0
AMTRAN	Revenue Vehicles : Buses (Rubber Tire Vehicles)	3.6	3
AMTRAN	Equipment : Service Vehicles (Non-Revenue)	4.3	0
AMTRAN	Equipment : Capital Equipment	14.2	65
AMTRAN	Facilities : Administration	32.6	0
AMTRAN	Facilities : Maintenance	32.3	0
AMTRAN	Facilities : Passenger	11.6	0
ATA	Revenue Vehicles : Buses (Rubber Tire Vehicles)	7.7	11
ATA	Equipment : Service Vehicles (Non-Revenue)	9.7	7
ATA	Equipment : Capital Equipment	64.9	35
ATA	Facilities : Administration	24.7	3
ATA	Facilities : Passenger	6.0	2
BCTA	Revenue Vehicles : Buses (Rubber Tire Vehicles)	1.4	48
BCTA	Equipment : Service Vehicles (Non-Revenue)	8.3	6
BCTA	Equipment : Capital Equipment	9.3	106
BCTA	Facilities : Passenger	22.0	81

Adding new grants is simple. First select “Add Grant” from the grant table.

Figure 126 Adding a Grant

The screenshot shows the 'Grants' section of the CPT. At the top, there's a status filter set to 'In Development / Open'. Below it is a table with columns: Grant Number, Source, Program, Grant Year, Owner, Contributor, Legislative Authorization, Date of Award, Date of Most Recent Amendment, Status, Last Update By, and Last Update Date. The table contains three rows of data. In the bottom right corner of the page, there is a large orange button with the text 'Add a Grant'.

Grant Number	Source	Program	Grant Year	Owner	Contributor	Legislative Authorization	Date of Award	Date of Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Federal	5311	2018	DRPT	ADCM	MAP-21	12/04/2018	03/07/2019	Open	Lydia Chang	03/07/2019 01:11
State Cap 2019	State	Act 3 BSG	2018	DRPT	Other	2019 Budget	10/01/2018		In Development	Lydia Chang	03/07/2019 01:12
Agency Local Capital	Local	Unknown Program	2018	DRPT	Multiple	Local Capital Funds - 2019	11/07/2018		In Development	Lydia Chang	03/07/2019 01:20

You'll then be directed to fill out all required fields, as depicted on the details tab. Once you add the grant, you will be directed to the grant details page.

Figure 127 Adding Required Details (New Grants)

The screenshot shows the 'Add Grant' form. It includes fields for 'Grant Number', 'Source', 'Program', 'Owner', 'Contributor', 'Legislative Authorization', 'Date of Award' (with a calendar icon), 'Method of Apportionment Structure' (set to 'Single Apportionment'), 'Grant Year' (set to '2019'), 'Total Apportionment' (with a dollar sign icon and a value of '0'), 'Grant Development Method' (set to 'Directly Generated'), and two buttons at the bottom: '+ Add Grant & Go To Grant Details' and 'Cancel'. A large orange arrow points from the left towards the 'Add a Grant' button in the top right. Another orange callout bubble on the left says 'Add Grant & Go to Grant Detail Page'.

In order to view a complete list of grants, select the Grant option on the Funding dropdown menu, where you will be redirected to the grant table. The grant table is automatically filtered for viewing of grants in both "In Development" and "Open" status. A customized grant export can be exported in multiple formats by clicking the "Export" button.

Figure 128 Grants Table

Grant Number	Source	Program	Authorization	Date of Award	Date of Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Federal	5311	2018	DRPT	ADCM	MAP-21	Lydia Chang	03/07/2019 01:20 PM
State Cap 2019	State	Act 3 BSG	2018	DRPT	Other	2019 Budget	Lydia Chang	03/07/2019 01:19 PM
Agency Local Capital	Local	Unknown Program	2018	DRPT	Multiple	Local Capital Funds - 2019	Lydia Chang	03/07/2019 01:20 PM

Clicking on the Grant Number text within the row of a grant record, will provide detailed information about that specific grant.

Figure 129 Accessing an Existing Grant

Grant Number	Source	Program	Authorization	Date of Award	Date of Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Federal	5311	2018	DRPT	ADCM	MAP-21	Lydia Chang	03/07/2019 01:20 PM
State Cap 2019	State	Act 3 BSG	2018	DRPT	Other	2019 Budget	Lydia Chang	03/07/2019 01:19 PM
Agency Local Capital	Local	Unknown Program	2018	DRPT	Multiple	Local Capital Funds - 2019	Lydia Chang	03/07/2019 01:20 PM

Editing grant profile data allows users to modify core attributes that are not expected to change, but corrections may be necessary from time to time. Profile data can be modified by clicking on the edit button, editing the data, and clicking the “Save” button. Clicking the “Cancel” button will result in any changes not being saved.

Figure 130 Editing or Updating an Existing Grant

Grant Profile
VA-23-12-2013-01 : Federal : 5311 : Open

Details		Apportionments		Assets		Amendments		History	
* Grant Number	VA-23-12-2013-01	* Method of Apportionment Structure	Single Apportionment	* Grant Year	2019				
* Source	Federal	* Total Apportionment	\$ 1,100,540						
* Program	5311	Grant Development Method	Directly Generated						
* Owner	DRPT	* Contributor		ADCM					
Legislative Authorization		Date of Most Recent Amendment		Date of Closeout					
MAP-21		03/07/2019		-					
* Date of Award		12/04/2018							

All grants have a three-stage lifecycle: In Development, Open, and Closed. When a grant is first created, it starts in the “In Development” status. Grants in the In Development Status are for those grants that are still being edited and are not ready for use. Once a grant is “Published”, it moves to the “Open” status and the grant is ready for use. While in the Open status, individual grants and associated apportionment values will be available as selections within the “Procurement & Purchase” section of each asset profile. When a grant is no longer being used, the grant should be “Closed”. When in a Closed status, the grant is not editable and

is no longer available as a selection within an asset profile. Should a grant be closed in error, users can select the “Reopen” action, returning the grant to an Open status.

Figure 131 Managing the Lifecycle of a Grant

Grant Profile
VA-23-12-2013-01 : Federal : 5311 : Open

Details

Grant Number: VA-23-12-2013-01
Source: Federal
Program: 5311
Owner: DRPT
Legislative Authorization: MAP-21
Date of Award: 12/04/2018

Contributor: ADCM
Date of Most Recent Amendment: 03/07/2019
Date of Closeout: -

Method of Apportionment Structure: Single Apportionment
Total Apportionment: \$ 1,100,540
Grant Development Method: Directly Generated

Grant Year: 2019

Actions: Close, Edit

Grant amendments can be managed by accessing the Amendments tab within a grant profile. Existing amendments can be exported, viewed edited, or deleted from the Amendments table. New amendments can be added by selecting the “Add Amendment” button.

Figure 132 Managing Grant Amendments

Grant Profile
VA-23-12-2013-01 : Federal : 5311 : Open

Details

Amendments

+Add Amendment

Amendment Number	Grant Number	Comments	Created By	Created Date & Time	Actions
01	VA-23-12-2013-01	Amendment for project scope changes	Lydia Chang	03/07/2019 01:18 PM	

Show 1 to 0 of 0 rows

You'll then be directed to fill out all required fields, as depicted on the Add Amendment section. Users are required to add an amendment number, and a comment. Users are not required to update the grant number, but if the grant number is updated the change will be reflected on all viewable grant number values across the system. Once you add the grant amendment, you will be directed to the Amendment details page.

Figure 133 Adding Required Details (Grant Amendments)

Home > Grants > VA-23-12-2013-01 > New Amendment

Add Amendment

* Amendment Number

* Update Grant Number
 Yes
 No

* Grant Number
 VA-23-12-2013-01

Comments

+ Add Amendment Cancel

10.5 My Funds

The My Funds section is a section for organization users to view all Buckets available to their organization(s). Buckets should be thought of as program-based annual budgets, which have funds available across one or multiple years, and that can be allocated to ALIs by organization users.

Figure 134 My Funds

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Programs, Templates, Buckets, and a dollar sign icon. A dropdown menu is open from the dollar sign icon, showing options like Programs, Templates, Buckets, My Funds, Fund Projects, Bond Requests, Status, Import/Export, CARBON, and CARS. An orange callout bubble points to the 'My Funds' option. Below the navigation bar is a table titled 'Asset Summary' with a 'All' filter selected. The table has columns for Type, Avg. Age, Count, Cost, and Book Value. It lists various assets such as ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, etc., with their respective details.

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	2.6	30	\$1,575,635	\$1,024,97
ACTS Support Facilities	2.0	1	\$403,440	\$387,75
AMTRAN Revenue Vehicles	11.4	30	\$5,470,730	\$2,165,63
AMTRAN Stations/Stops /Terminals	10.6	5	\$58,487	\$20,46
AMTRAN Support Facilities	29.4	5	\$2,274,755	\$1,108,90
AMTRAN Support Vehicles	4.6	7	\$205,513	\$82,53
AMTRAN Maintenance Equipment	12.9	211	\$3,036,981	\$478,39
AMTRAN Facility Equipment	30.6	90	\$2,907,326	\$1,109,83
AMTRAN IT Equipment	6.4	84	\$54,756	\$20,144
AMTRAN Office Equipment	14.2	204	\$111,710	\$16,904

Each row in the table represents a unique fund, while each column represents a different fund attribute. Attributes include Fiscal Year, Program, Name, Type, Owner, Total funds available, Committed (allocated) value, Available (unallocated) balance, and Expires (year in which the funds expire).

Figure 135 My Funds Table

The screenshot shows the Capital Planning Tool (QA) interface with the 'My Funds' table. The table has columns for FY, Program, Name, Type, Total, Committed, Available, and Expires. An orange arrow points to the 'Total' column header. The table displays 0 matching records found.

10.6 Create New Funds

Users also can create new Buckets for use by their organization, for any funding sources that may have not been created by a parent organization.

Figure 136 Create New Funds

The screenshot shows the 'My Funds' page in the CPT. At the top left, there is a 'Create Buckets' button. An orange arrow points to this button with the label 'Create New Funds'. Below the button is a table listing two existing funds: '5311 (5311 Rural Apportionment)' for FY 18-19 and '5311 (5311 Rural Apportionment)' for FY 19-20. The table includes columns for FY, Program, name, Type, Total, Committed, Available, Expires, and actions. A note at the bottom says 'Showing 1 to 2 of 2 rows'.

Clicking “Create Buckets” will allow you to add new funds based on existing programs and templates. Creating new Buckets is useful if you need to create a budget for any directly generated revenue or other revenue sources not created by a parent organization. Specify the details of the Bucket, click “Submit” and the bucket will be available for use.

Figure 137 Managing Buckets

The screenshot shows the 'Manage Buckets' form. It includes fields for Program (5337), Template (5337 Fixed Guideway), Owner (CCTA-Cambria County Transit Authority), and date ranges for From FY and To FY. Below these, there is a section for '5337 Fixed Guideway-CCTA-' and a budget field labeled 'Budget (\$)' with a value of '\$1,000,000'. A 'Submit' button is at the bottom. An orange arrow points to the 'Submit' button with the label 'Click Submit When Ready'. Another orange arrow points to the 'Enter Bucket Details' section above the budget field.

10.7 Fund Projects

Organization users can allocate available Buckets to projects by ALI from the Fund Projects screen.

Figure 138 Fund Projects

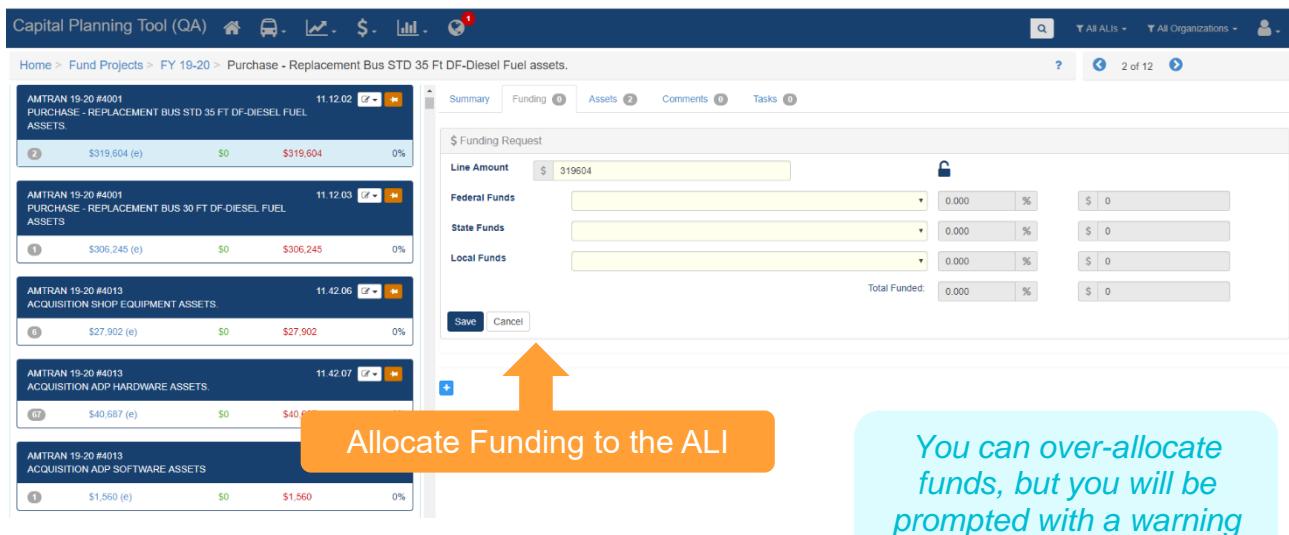
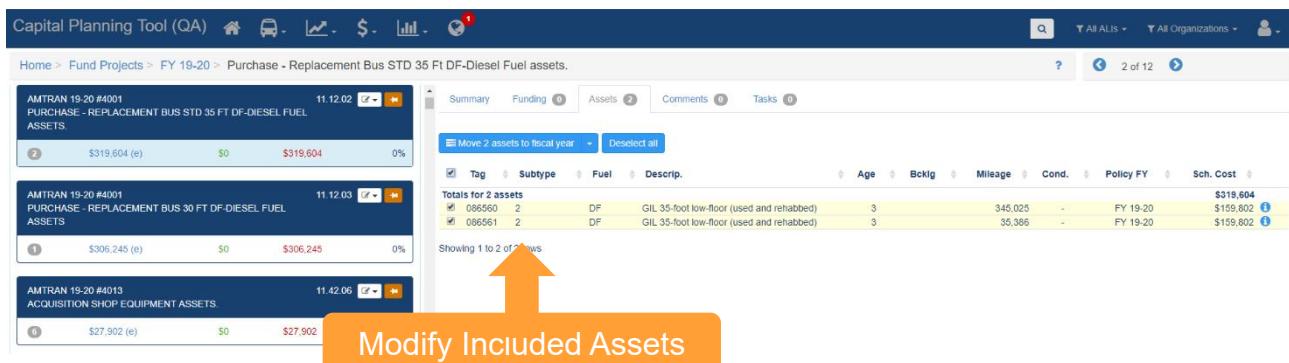
The screenshot shows the Capital Planning Tool (QA) interface. On the left is a table titled "Asset Summary" with columns for Type, Avg. Age, Count, Cost, and Book Value. The table lists various asset types like Revenue Vehicles, Support Facilities, and Maintenance equipment. On the right is a vertical navigation menu under the heading "\$ My Funds". The menu items include Programs, Templates, Buckets, Fund Projects (which is highlighted with an orange arrow), Bond Requests, Status, and Import/Export. Below the menu are two small sections: CARBON and CARS.

The Fund Projects interface has many elements. The headers show committed (allocated) funds for each fiscal year. Users can scroll through the fiscal years displayed in the larger columns by clicking the arrows at the top right of the screen. Three years-worth of projects are displayed at a time, with all the ALIs for the corresponding fiscal year displayed in each column.

Figure 139 Fund Projects Interface

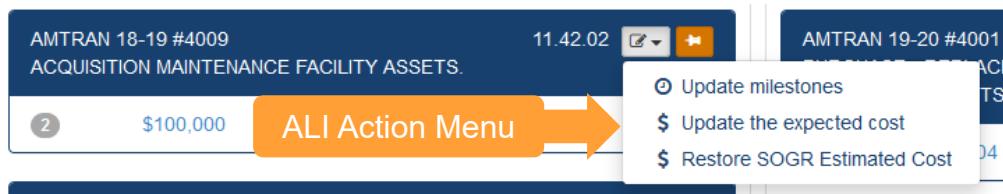
The screenshot shows the Fund Projects interface with three columns of projects: FY 18-19, FY 19-20, and FY 20-21. Each column contains several rows of project details. A red box highlights the first row in the FY 18-19 column with the text "Click an ALI for more details". Another red box highlights the header of the FY 20-21 column with the text "Adjust Displayed Project Years". A warning message "Warning! Please correct overcommitted funds." is visible above the project tables.

Clicking on an individual ALI will bring you to the detailed Fund Project screen for that ALI. On the details page is where users can allocate funding from available Buckets to the ALI, remove or move assets tied to the ALI, add comments, or create tasks.

Figure 140 Allocate Funding to ALIs**Figure 141 Adjust Assets Included in ALI**

Clicking on the actions menu in the main Fund Projects interface on an ALI will allow you to update characteristics of the ALI such as milestones, estimated ALI cost, or revert to the original SOGR estimate if the ALI estimate was modified at any point.

A horizontal pin icon marks ALIs as "preapproved" to ensure these projects are programmed in an organizations capital plan. The functionality involves the parent organization "pinning" an ALI to an agencies capital plan, which prevents that ALI from being further altered in any way. Child organizations are unable to pin their own ALIs.

Figure 142 Fund Projects ALI Actions and Pinning Projects

10.8 Bond Requests

A Bond Request is a request by an organization (transit agency or parent agency) for a bond authorization in a future piece of legislation. To begin using bond requests, navigate to the Bond Request interface.

Figure 143 Bond Requests

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Bus, and Graph. Below it is a sub-navigation bar with icons for Programs, Templates, Buckets, My Funds, Fund Projects, Bond Requests, Status, and Import/Export. A dropdown menu is open over the 'Bond Requests' icon. An orange arrow points from the text 'Bond Requests' to this icon. On the left, there's a table titled 'Asset Summary' with columns for Type, Avg. Age, Count, Cost, and Book Value. The table lists various assets like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc.

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	2.6	30	\$1,575,635	\$1,024,97
ACTS Support Facilities	2.0	1	\$403,440	\$387,75
AMTRAN Revenue Vehicles	11.4	30	\$5,470,730	\$2,165,63
AMTRAN Stations/Stops/Terminals	10.6	5	\$58,487	\$20,46
AMTRAN Support Facilities	29.4	5	\$2,274,755	\$1,108,90
AMTRAN Support Vehicles	4.6	7	\$205,513	\$82,53
AMTRAN Maintenance Equipment	12.9	211	\$3,036,981	\$478,39
AMTRAN Facility Equipment	30.6	90	\$2,907,326	\$1,109,83
AMTRAN IT Equipment	6.4	84	\$54,756	\$20,144
AMTRAN Office Equipment	14.2	204	\$111,710	\$16,904

The bond request screen shows details about a bond request.

Figure 144 Bond Request Interface

The screenshot shows the 'Bond Requests' interface. At the top, there's a header with a search bar, filters for All ALUs and All Organizations, and a user icon. Below the header, the breadcrumb navigation shows 'Home > Bond Requests'. The main area is titled 'Bond Requests' and contains a table with one row. The table has columns for Organization, Created, Title, Amount, Status, Description, Justification, and Action. The single row shows 'AMTRAN' as the organization, 'Invalid date' as the creation date, 'Test Bond' as the title, '\$40,000' as the amount, 'Pending' as the status, and an empty description and justification. The action column has two icons: a green checkmark and a blue pencil.

Organization	Created	Title	Amount	Status	Description	Justification	Action
AMTRAN	Invalid date	Test Bond	\$40,000	Pending			

Showing 1 to 1 of 1 rows

Transit Managers, DOT managers, and Administrators can create new bond requests.

Figure 145 New Bond Request

New Bond Request

* Organization

* Title

* Description

* Justification

* Amount

\$ 0	* Federal Pcnt	Federal Amount
	0	\$ 0

Federal Funds

None	* State Pcnt	State Amount
	96.775	\$ 0

Local Pcnt	Local Amount
3.225	\$ 0

Create Bond request

Once a bond request is submitted, it has four status updates. Pending (sent to DOT for review), rejected (DOT has reviewed and rejected), submitted (submitted to the program office for legislator review), then authorized or not authorized (by legislative review).

If a bond request is authorized, DOT managers can assign the authorized request to a Bucket.

10.9 Review

The Status interface serves as a project review module and tracks the entire work flow for the annual capital project planning process. As the fiscal year progresses, users will mark work complete in the Status page and advance through the work flow. When the year's work has been completed, the data is archived and upon completion of all organization project funding the application will be rolled over into the next planning year.

Figure 146 Review

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a table titled 'Asset Summary' with columns for Type, Avg. Age, Count, Cost, and Book Value. In the center, a dropdown menu is open under 'Status' with options like 'Preparation', 'Unconstrained Plan', 'Funding', 'Constrained Plan', and 'Final Review'. The 'Final Review' option is highlighted with an orange arrow. On the right, there are sections for 'My Notices' (No notices), 'My Messages' (with two entries from Elizabeth Bonini), and a 'Sent' folder.

The Status page is made up of five stages that must be completed in sequential order: Preparation, Unconstrained Plan, Funding, Constrained Plan, and Final Review. Each stage consists of a series of verifications and/or approvals. Once an organization's data has been verified and approved through all five stages, a link to the export will display.

Each stage follows the same general formula—the submittal organization performs some work and the State approves that work. As each action is completed and approved, the next action will unlock.

Figure 147 Review and Status

The screenshot shows the 'FY 18-19 Capital Plans Status' page. At the top, there's a 'Save' button and a 'Select All' checkbox. Below is a table with columns for Preparation (Assets Updated, Updates OK, Funds Verified), Unconstrained Plan (Agency Approval, State Approval), Funding (Funding Complete), Constrained Plan (Agency Approval, State Approval), and Final Review (Approver 1-4, Archive). The 'Organization Details' section at the bottom shows progress for three organizations: ACTS (0%), AMTRAN (13%), and BARTA (68%).

Clicking on an individual organization will give details about the status of the organization's review.

Figure 148 Review and Status Organization Detail

Preparation		Assets Updated	100%
		Updates OK	<input checked="" type="checkbox"/>
		Funds Verified	<input checked="" type="checkbox"/>
		Agency Approval	<input checked="" type="checkbox"/>
		State Approval	<input type="checkbox"/>
Unconstrained Plan		Funding Complete	0%
		Agency Approval	<input type="checkbox"/>
		State Approval	<input type="checkbox"/>
		Approver 1	<input type="checkbox"/>
		Approver 2	<input type="checkbox"/>
		Approver 3	<input type="checkbox"/>
		Approver 4	<input type="checkbox"/>

10.10 Import/Export

Users can import or export project and funding data in a JSON file. These JSON file exports are specifically used to transfer data back and forth between external systems.

Figure 149 Import/Export

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	2.6	30	\$1,575,635	\$1,024,97
ACTS Support Facilities	2.0	1	\$403,440	\$387,75
AMTRAN Revenue Vehicles	11.4	30	\$5,470,730	\$2,165,63
AMTRAN Stations/Stops/Terminals	10.6	5	\$58,487	\$20,46
AMTRAN Support Facilities	29.4	5	\$2,274,755	\$1,108,90
AMTRAN Support Vehicles	4.6	7	\$205,513	\$82,53
AMTRAN Maintenance Equipment	12.9	211	\$3,036,981	\$478,39
AMTRAN Facility Equipment	30.6	90	\$2,907,326	\$1,109,83
AMTRAN IT Equipment	6.4	84	\$54,756	\$20,144
AMTRAN Office Equipment	14.2	204	\$111,710	\$16,904
AMTRAN Communications Equipment	7.0	61	\$1,790,766	\$775,479
AMTRAN Signals/Signs	7.3	12	\$81,553	\$33,139
ATA Revenue Vehicles	8.4	104	\$18,778,488	\$2,698,763

The import/export page shows recent imports and exports. You can click on a recent item to see details about a specific export.

Figure 150 Recent Imports and Exports

Type	Creator	Created At
Import	Kyle Eckert	11/20/2017
Import	Kyle Eckert	11/20/2017
Import	Kyle Eckert	02/05/2018
Import	Kyle Eckert	04/12/2018
Import	Elizabeth Bonini	06/29/2018
Import	Elizabeth Bonini	07/12/2018

Showing 1 to 6 of 6 rows 200 rows per page

Exporting first will
give you the
required formatting

Click “New Export” to download the data either ALI- or Project-level data within a fiscal year range. Include whether or not to include funding or asset data in the export.

Figure 151 New Export

New Export

New Project/Funding Export

Level
 ALI level
 Project level

From: FY 18-19 To: FY 18-19

Include Funding
 Include Assets

Save

Clicking save will bring you to the details page for the export.

Figure 152 Export Details

Capital Planning Tool (QA) Home > Project and Funding Import/Export > Export

dotGrants migration was successfully created.

\$ Project/Funding Export
07/20/2018

Type: Export
Creator: Elizabeth Bonini
Created At: 11:27 AM 07/20/2018
Level: Activity Line item
Description: FY 18-19 for BPT, ACTS, AMTRAN, ATA, BARTA, BCT, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CAR S, CAT, CATA', CCTA, CHESSR, CLARCO, CNTRCO, COLEBT, COLT S, CRATA, CTDC, CUMBCO, DUFAS, EMTA, ENDMTN, FACT, FORE ST, FRNKCO, GREENIE, HBFOO, HPT, ICTA, LANTA, LCTA, MCRCOG, MCRA, MIDCO, MMVTA, MONTCO, MTR, NCATA, PAAC, PART, PERRY, PIKECO, RRTA, SCTA, SEPTA, SOMERS, STEP, STN, STS, SUCCO, TAWC, USTA, VCTO, WASHCO, WAYNCO, WBT, WCTA, YCTA including funding and assets

Actions: Download

Click Download to save the export

You can then open and edit the JSON file in your excel. When you’re ready, click Import and upload the file back into the system.

Figure 153 Import

Capital Planning Tool (QA) Home Project and Funding Import/Export New Import

New Project/Funding Import

* JSON File
Browse... No file selected.

Save

After the import is complete, you'll see details about the uploaded import. If you need that file at a later time, you can return and redownload the file from the import screen.

Figure 154 Import Details

Capital Planning Tool (QA) Home Project and Funding Import/Export Import

\$ Project/Funding Import 07/12/2018

Type Import Creator Elizabeth Bonini Created At 02:53 PM 07/12/2018

Actions Download

Details

Buckets 259 Errors 0

Note that amounts may not match import/export if subsequent changes have been made in CPT.

Create Buckets

FY	Program (Template)	Name	Type	Owner	Restricted To	Total	Committed	Available	Expires	Actions
FY 08-09	1514 Bond (1514 Bond Funds - SEPTA/PAAC Owned)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY08/09-Act 41 of 2008 - 321, 80, (7.4) (vii)	State	PAAC		\$7,200,000	\$0	\$7,200,000		Edit View Delete
FY 06-07	1514 Bond (1514 Bond Funds - SEPTA/PAAC Owned)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY06/07-Act 83 of 2006 - 738, 116, (18) (xii)	State	PAAC		\$4,544,969	\$0	\$4,544,969		Edit View Delete
FY 06-07	1514 Bond (1514 Bond Funds - SEPTA/PAAC Owned)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY06/07-Act 83 of 2006 - 799, 116, (18) (xii)	State	PAAC		\$5,850,000	\$0	\$5,850,000		Edit View Delete

11.0 Reports

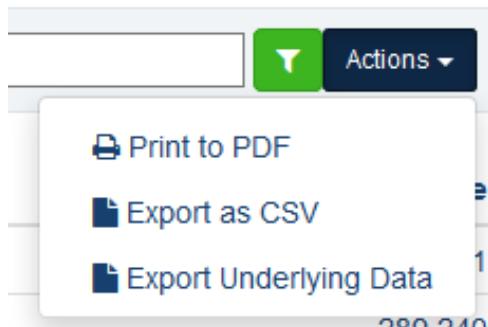
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 155 Reports Dropdown

The screenshot shows the CPT interface with a dark blue header bar. In the top right corner of the main content area, there is a dropdown menu labeled "Reports". This menu has several options: "Reports", "Capital Needs Reports", "System Reports", "Planning Reports", and "NTD Reporting". An orange arrow points from the text "Reports Dropdown" to the "Reports" option in the menu. Below the menu, there is a table titled "Asset Summary" with columns for Type, Avg. Age, Count, Cost, and Book Value. To the right of the table, there is a section titled "Num. Projects" and "Cost" with some data. At the bottom right of the screen, there is a date range selector set to "8-19".

Reports can be exported into multiple file formats for distribution or further analysis. In the top right corner of each report, look for the Actions menu for available download links.

Figure 156 Report Exports

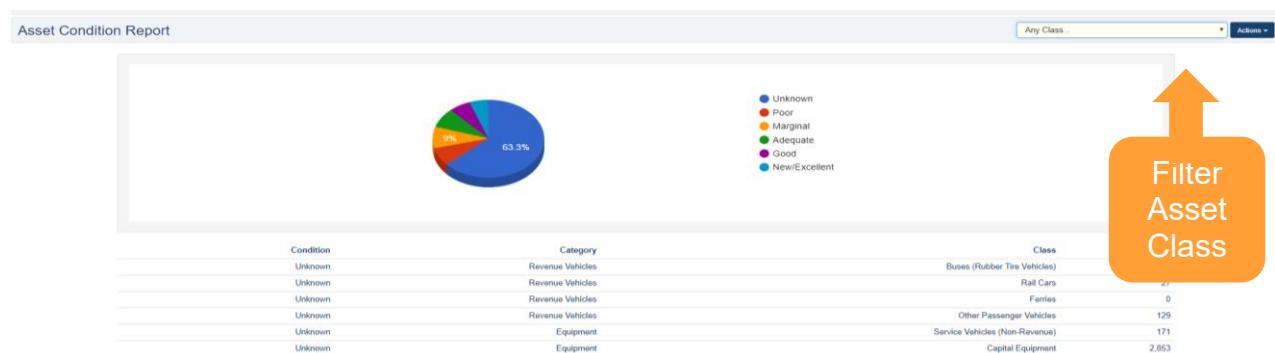


11.1 Inventory Reports

Inventory reports are a rollup of asset inventory data, including age, condition, and funding related calculations.

Asset Condition Report—The Asset Condition Report displays the count of assets of different types for a range of asset condition ratings (excellent, good, adequate, etc.). The report can filter data by Asset Class.

Figure 157 Asset Condition Report



Asset Age Report—The Asset Age Report displays the count of assets of different classes for a range of asset ages (one year old, two years old, etc.). The report can filter data by Asset Class.

Figure 158 Asset Age Report



The Asset Funding Source Report computes for every funding program, organization (agency), year of purchase, the number of assets that were purchased using a particular funding program as well as the cost (purchase amount) associated with that particular funding program. Drill-down functionality allows the user to see the exact lists of assets, and the dollars spent on each asset for that funding source. Multiple filtering options are available, providing the ability to filter by multiple combinations of data:

- Agency, Funding Program.
- Agency, Funding Program, Year of Purchase.
- Funding Program, Agency.
- Funding Program, Agency, Year of Purchase.
- Funding Program, Year of Purchase.
- Funding Program, Year of Purchase, Agency.
- Year of Purchase, Funding Program.
- Year of Purchase, Funding Program, Agency.

Figure 159 Asset Funding Source Report



11.2 Capital Needs Reports

Capital Needs Reports are rollups of information about different projects, ALIs and funding.

The Unconstrained Capital Projects Report is a collection of unconstrained capital projects associated with individual organizations. This report can be filtered by fiscal year, emergency versus nonemergency, multi or single-year, and method of creation.

Figure 160 Unconstrained Capital Projects Report

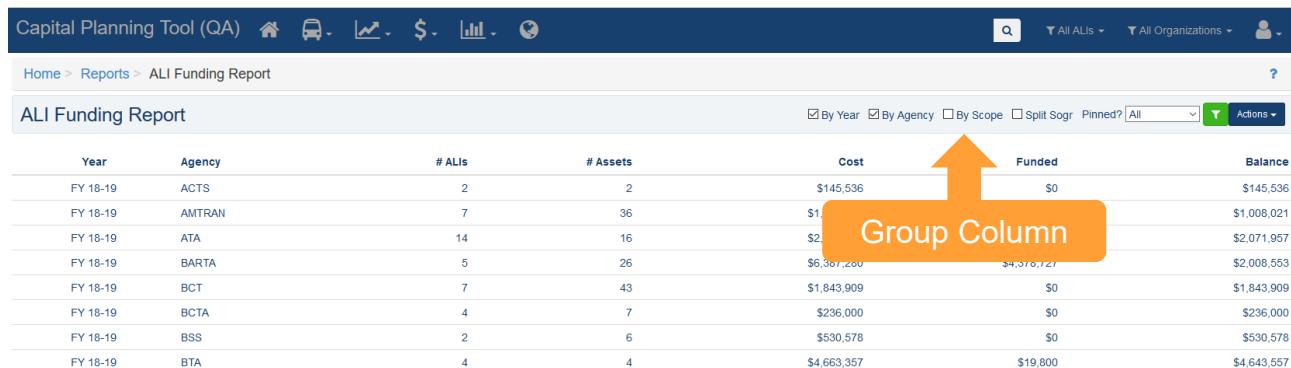
Org	Count	Cost
ACTS	14	\$3,384,907
AMTRAN	47	\$13,274,188
ATA	34	\$44,042,171

The Need versus Funding Statewide Report shows the total project-based needs by fiscal year versus available funding, broken out by funding program.

Figure 161 Need versus Funding Statewide Report

Fiscal Year	Total Needs	Total Federal Funds	Total State Funds	Total Local Funds	Balance/(Shortfall)
FY 18-19	\$946,477,219	\$61,129,001	\$1,373,127,978	\$2,202,000	\$489,981,760
FY 19-20	\$335,781,113	\$10,284,000	\$0	\$0	-\$325,497,113
FY 20-21	\$118,919,941	\$9,343,000	\$0	\$24,975	-\$109,551,966
FY 21-22	\$73,150,311	\$8,383,000	\$0	\$0	-\$64,767,311
FY 22-23	\$124,717,118	\$0	\$0	\$0	-\$124,717,118
FY 23-24	\$176,789,092	\$0	\$0	\$0	-\$176,789,092
FY 24-25	\$186,307,185	\$0	\$0	\$0	-\$186,307,185
FY 25-26	\$101,012,897	\$0	\$0	\$0	-\$101,012,897
FY 26-27	\$257,203,755	\$0	\$0	\$0	-\$257,203,755
FY 27-28	\$174,267,299	\$0	\$0	\$0	-\$174,267,299
FY 28-29	\$396,952,612	\$0	\$0	\$0	-\$396,952,612
FY 29-30	\$190,215,433	\$0	\$0	\$0	-\$190,215,433

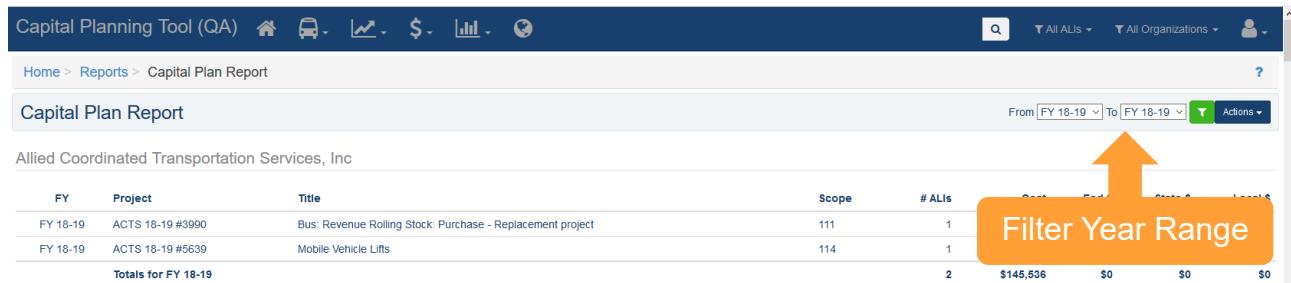
The ALI Funding Report displays a summary of funded ALIs. The user selects the level that they would like to group columns by (By Year, By Organization (agency), By Scope, and Split SOGR), and the system reports on the number of ALIs, number of Assets, ALI Cost, Allocated Funding (Funded), and the Balance for the selected level of grouping.

Figure 162 ALI Funding Report


The screenshot shows a table with columns: Year, Agency, # ALIs, # Assets, Cost, Funded, and Balance. The 'Cost' column is highlighted with a yellow background and has a yellow arrow pointing to it from above. The 'Funded' and 'Balance' columns are also visible.

Year	Agency	# ALIs	# Assets	Cost	Funded	Balance
FY 18-19	ACTS	2	2	\$145,536	\$0	\$145,536
FY 18-19	AMTRAN	7	36	\$1,008,021		
FY 18-19	ATA	14	16	\$2,071,957		
FY 18-19	BARTA	5	26	\$2,008,553		
FY 18-19	BCT	7	43	\$1,843,909	\$0	\$1,843,909
FY 18-19	BCTA	4	7	\$236,000	\$0	\$236,000
FY 18-19	BSS	2	6	\$530,578	\$0	\$530,578
FY 18-19	BTA	4	4	\$4,663,357	\$19,800	\$4,643,557

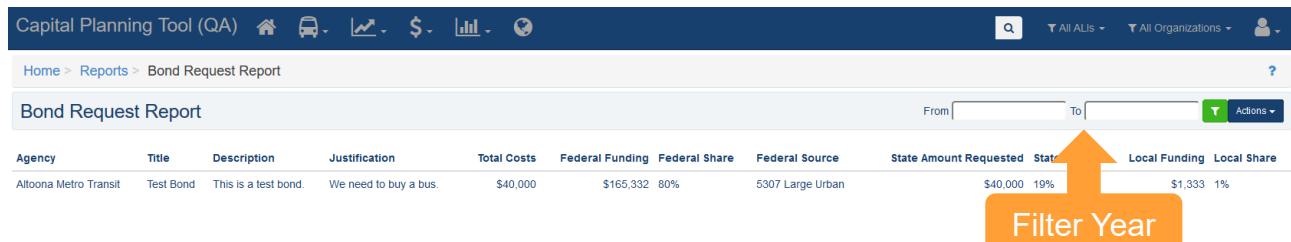
The Capital Plan Report shows funded projects, and ALIs for a filtered range of years, providing a breakdown by Federal, State, and Local funding sources. The report groups data by organization, fiscal year and displays one project per row and one project attribute per column.

Figure 163 Capital Plan Report


The screenshot shows a table with columns: FY, Project, Title, Scope, # ALIs, Cost, Funded, and Balance. The 'Cost' column is highlighted with a yellow background and has a yellow arrow pointing to it from above. The 'Funded' and 'Balance' columns are also visible.

FY	Project	Title	Scope	# ALIs	Cost	Funded	Balance
FY 18-19	ACTS 18-19 #3990	Bus: Revenue Rolling Stock: Purchase - Replacement project	111	1	\$145,536	\$0	\$145,536
FY 18-19	ACTS 18-19 #5639	Mobile Vehicle Lifts	114	1	\$0	\$0	\$0
Totals for FY 18-19						\$145,536	\$0

The Bond Request Report finds and displays all "Pending" and "Submitted" bond requests whose statuses were last updated between a user-defined start and end date.

Figure 164 Bond Request Report


The screenshot shows a table with columns: Agency, Title, Description, Justification, Total Costs, Federal Funding, Federal Share, Federal Source, State Amount Requested, Status, Local Funding, and Local Share. The 'Total Costs' column is highlighted with a yellow background and has a yellow arrow pointing to it from above. The 'Status' and 'Local Share' columns are also visible.

Agency	Title	Description	Justification	Total Costs	Federal Funding	Federal Share	Federal Source	State Amount Requested	Status	Local Funding	Local Share
Altoona Metro Transit	Test Bond	This is a test bond.	We need to buy a bus.	\$40,000	\$165,332	80%	5307 Large Urban	\$40,000	19%	\$1,333	1%

11.3 System Reports

System reports keep track of system-related functional metrics.

The User Login Report keeps track of users, the number of logins made, and the previous login of each user.

Figure 165 User Login Report

Org	First Name	Last Name	Num Logins	Last Login	Acct Locked On
BPT	Aaron	Wolff	276	01:36 PM 06/25/2018	
BPT	Andrew	Batson	72	02:03 AM 05/04/2018	
BPT	Anthony	Stever	163	10:01 AM 05/29/2018	
BPT	April	Fosmore	9	07:49 AM 10/19/2016	
BPT	BPT	User	4	02:11 PM 03/04/2016	
BPT	Colton	Brown	208	02:59 PM 06/20/2018	
BPT	Elizabeth	Bonini	311	03:28 PM 07/17/2018	
BPT	Eric	Ziering	20	11:38 AM 06/01/2015	
BPT	Ernie	Shank	183	03:53 PM 06/20/2018	
RPT	Ian	Netamore	13	09:42 AM 06/15/2018	

The Issues Report keeps a log of reported issues within TransAM and the status of any submitted issues.

Figure 166 Issues Report

ORGANIZATION	TYPE	DATE/TIME	COMMENTS	BROWSER TYPE	FIRST NAME	LAST NAME	PHONE	ISSUE_STATUS	RESOLUTION_COMMENTS
BPT	Bug	2015-06-10 19:20:41 UTC	When exporting vehicle information from the asset inventory to Excel, fields that have a symbol or check mark are blank in excel. For example, I selected 40ft vehicles and selected/deselected columns. When I exported to Excel, the ADA field (which was displayed as check marks in CPT) is blank for each asset.	Microsoft IE 11	Stephen	Panko	9,999,999,999.00	Open	
BPT	Bug	2015-06-12 16:46:05 UTC	On Wednesday June 10th Dana Moyer from STS reached out to me to request help updating the mileages for all of her vehicles. She said the every month they try to update the mileages for all of her vehicles and so I suggested she do a bulk/mass upload to make it easier. However, when we tried to download an inventory template we both were unable to do this (I ran into the "Oops... there was an error" screen* but I'm not sure what Dana got) Shortly after I got off the phone with Dana I logged in to production and I was able to download the template. However, I haven't been able to get a hold of Dana since our discussion on Wednesday to see if it worked for her. I will keep trying to reach out to her to see if she is able to download the template and do the mass upload thereafter.	Google Chrome	Patrick	Sosik	9,999,999,999.00	Open	
BPT	Bug	2015-06-19 11:42:17 UTC	Jeff Gilsson of SCTA is attempting to add assets and getting the "Oops Error 500 Application Error" From Jeff. Yesterday and today for a couple of times, I have been unable to use the CPT to add the information on the two minivans. I logged in...clicked on Add Assets under inventory...clicked on Van Asset Type... clicked on Create New Asset...and received the attached error message."	Microsoft IE 11	Kyle	Eckert	717-772-5614	Open	

11.4 Planning Reports

Planning Reports are reports that analyze asset-based data such as state of good repair, asset status, and metrics related to service life goals and performance.

The Revenue Vehicle Replacement Report finds and displays summary data for all revenue vehicles that are scheduled to be replaced within a specified year.

Figure 167 Revenue Vehicle Replacement Report

Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	\$226,647	\$1,032,574
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	28	\$10,703,185	\$15,351,540
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	156	\$33,434,345	\$64,564,155
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	151	\$25,090,859	\$65,899,722
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	404	\$22,996,202	\$117,170,310
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	59	\$12,698,894	\$20,638,200
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std	2	\$405,086	\$717,256
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	936	\$24,405,851	\$24,272,352
FY 19-20	Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car/Trailer	71	\$112,535,277	\$25,462,598

The State of Good Repair Report finds and displays summary data for all asset subtypes that are scheduled to be replaced across all planning years. The report is the same as the Revenue Vehicle Replacement Report except it is not limited to revenue vehicles and rolls up values across all planning years.

Figure 168 State of Good Repair Report

State of Good Repair Report						
State of Good Repair: All Transit Agencies						
Category	Class	Sub Type	Count	Book Value	Replacement Cost	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Articulated	11	\$6,197,520	\$8,414,445	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	438	\$138,243,902	\$189,321,201	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	27	\$416,191	\$1,476,958	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	161	\$67,597,460	\$92,477,734	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	623	\$208,254,531	\$285,018,765	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	736	\$53,347,885	\$217,175,923	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	154	\$35,377,187	\$55,183,445	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1,204	\$36,625,492	\$1,357,436	
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std	31	\$8,585,473	\$12,003,406	
Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	100	\$167,050,515	\$36,271,696	
Revenue Vehicles	Rail Cars	Light Rail Car	9	\$25,638,417	\$3,887,370	
Revenue Vehicles	Rail Cars	Commuter Locomotive Diesel	20	\$74,188,285	\$65,980,817	
Equipment	Service Vehicles (Non-Revenue)	Pickup/Utility Truck	75	\$436,717	\$2,616,326	
Equipment	Service Vehicles (Non-Revenue)	Sports Utility Vehicle	85	\$693,546	\$2,303,917	
Equipment	Service Vehicles (Non-Revenue)	Van	79	\$729,509	\$2,272,877	
Equipment	Service Vehicles (Non-Revenue)	Sedan/Station Wagon	62	\$437,762	\$1,546,568	
Equipment	Service Vehicles (Non-Revenue)	Other Support Vehicle	31	\$212,606	\$1,610,645	
Equipment	Service Vehicles (Non-Revenue)	Tow Truck	2	\$0	\$344,361	
Equipment	Capital Equipment	Bus Maintenance Equipment	1,033	\$7,060,493	\$11,975,400	
Equipment	Capital Equipment	Other Maintenance Equipment	140	\$11,904,184	\$16,743,863	
Equipment	Capital Equipment	Rail Maintenance Equipment	2	\$73,195	\$1,180,195	
Equipment	Capital Equipment	Other Facilities Equipment	416	\$3,164,904	\$5,017,581	

The Disposition Report finds and displays summary data for all asset subtypes that are scheduled to meet their Estimated Service Life within a particular fiscal year and are ready to be disposed.

Figure 169 Disposition Report

Disposition Report						
All Transit Operators						
Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	9	\$33,138,453	\$4,819,364
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	1	\$265,314	\$426,977
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	3	\$679,554	\$1,037,982
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1	\$29,493	\$25,649
FY 18-19	Equipment	Capital Equipment	Other Facilities Equipment	2	\$143	\$208
FY 18-19	Equipment	Capital Equipment	Other Communications Equipment	1	\$0	\$0
Totals for FY 18-19				17	\$4,112,957	\$6,310,180

The Asset Service Life Summary Report displays all asset categories, listed by subtype, and calculates the quantity and percentage of assets that are past their Estimated Service Life in month, miles, and the quantity and percentage that have fallen below the TERM threshold as set in the Asset Replacement/Rehabilitation Policy. Data can be filtered by Asset Category, and by a minimum and maximum range in months of assets beyond their Estimated Service Life. A drill-down of data is provided on an organization-level basis, while the table, and the underlying data used to make the calculations can be exported as well.

Figure 170 Asset Service Life Summary Report

Asset Service Life Summary Report						
Organization	Subtype	Quantity	# Past ESL (Mo.)	Pcnt	# Past ESL (Mi.)	Pcnt
All (Filtered) Organizations	Bus < 30 FT	123	55	45%	29	24%
All (Filtered) Organizations	Bus 30 FT	9	6	67%	9	100%
All (Filtered) Organizations	Bus Commuter/Suburban	14	0	0%	0	0%

Filter or Export

The TAM Service Life Summary Report displays all asset categories, listed by subtype, and calculates the following:

- Revenue Vehicles and Equipment—Service Vehicles: Quantity and percentage that are past their Useful Life Benchmark in months;
- Facilities (Primary): Quantity and percentage of Facilities (Primary) that have fallen below the TERM Policy value; and
- Infrastructure—Track: Linear asset miles of Infrastructure that have Active Performance Restrictions.

The ULB, and TERM values pull from the most recent year of the TAM Policy for each organization that are either in a Pending Activation or Active status. Data can be filtered by Asset Category, and a drill-down of data is provided on an organization-level basis, while the table, and the underlying data used to make the calculations can be exported as well.

Figure 171 TAM Service Life Summary Report

Organization	Asset Classification Code	Quantity	# At or Past ULB/TERM	Pcnt	Avg Age	Avg TERM Condition	Total Mileage
All (Filtered) Organizations	AO - Automobile	1	0	0%	12.00	1.00	301,611
All (Filtered) Organizations	BU - Bus	53	0	0%	15.70		
All (Filtered) Organizations	CU - Cutaway	123	0	0%	4.30		
All (Filtered) Organizations	MV - Mini Van	49	0	0%	9.00	2.08	212,607

12.0 Specialized Reports

12.1 Asset Fleet Builder

A fleet is a number of vehicles that share the same characteristics. Organizing vehicles into fleets is advantageous because it summarizes rolling stock inventories at a higher level.

The Asset Fleet Builder is a tool specifically designed to assist with the creation of the Revenue Vehicles (A-30), and Service Vehicles (Nonrevenue) (A-35) National Transit Database (NTD) asset reports. Both of these NTD asset forms require data be reported by fleet, and the Asset Fleet Builder provides an interface to auto-create and easily manage both Revenue Vehicle and Service Vehicle (Nonrevenue) fleets.

When building fleets for the first time, you can choose to use the Asset Fleet Builder. The builder analyzes organization inventories and automatically groups assets into fleets based on the unique fleet definitions and sorts those assets into either the Revenue Vehicles or Service Vehicles section. All assets grouped within a fleet will no longer be listed within the Orphaned Assets portion of the Manage Fleets section. When you run the builder, it will function as a background job in the system and notify you once complete in the notifications section. From there, users can review the fleets, add fleet-specific information or manually regroup assets as needed.

You should only use the builder tool the first time you create a fleet, otherwise you will delete existing fleets.

Figure 172 Asset Fleet Builder

Note: Running the Fleet Builder will delete all existing fleet data, if previously run.

The Asset Fleet Builder analyzes your organization's inventory and groups assets into fleets following parameters set by NTD reporting. If you run the asset fleet builder, you will delete all existing fleets and regroup the assets from scratch. Please note that you will lose any existing fleet data.

Once the builder has completed, you will receive a notification. Please review your fleets at that time and add fleet specific information.

Build Revenue or Support Fleets

Build Revenue Vehicles Fleets

Build Support Vehicles Fleets

When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 173 Asset Fleet Builder—Orphaned Assets

The screenshot shows the 'Fleets' section of the Capital Planning Tool. At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is active. Below it, the 'Orphaned Assets' section is displayed with a table. The table has columns for Agency, Asset Type, Tag, ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. There are four rows of data. On the right side of the table, there is a large orange button labeled 'Add Asset to Fleet'. An orange arrow points from this button to another 'Add Asset to Fleet' button located in a modal dialog.

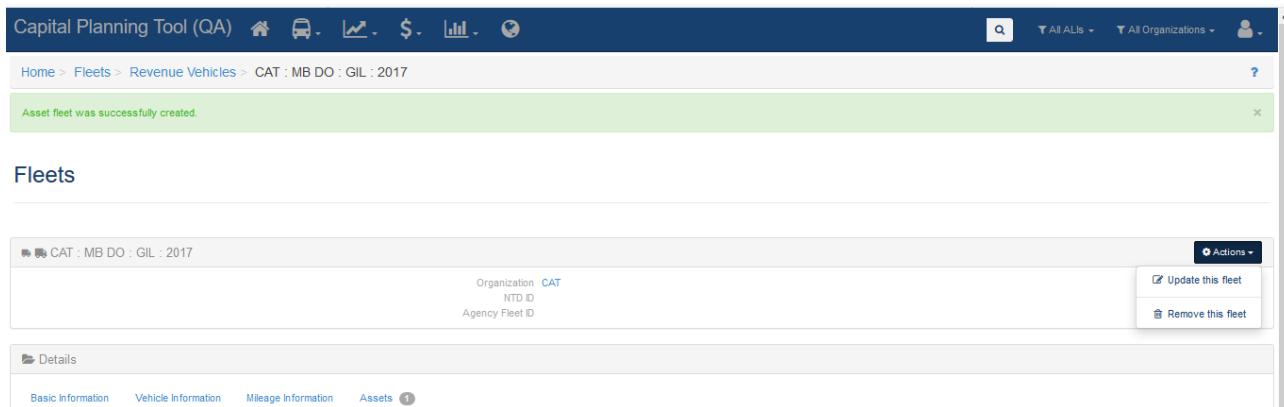
Agency	Asset Type	Tag	ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGGB2713H3188913	-	GIL-Gillig Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#271	PT Bus #271	1FDDE4FS8HDC18987	-	FRD-Ford Motor Corporation	Champion				In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#272	PT Bus #272	1FDDE4FS8HDC18988	-	FRD-Ford Motor Corporation	Champion	2017			In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#273	PT Bus #273	1FDDE4FSXHDC18992	-	FRD-Ford Motor Corporation	Champion				In Service	<button>Add to Fleet</button>

Selecting “Add to Fleet” on the right allows users to add assets to a current fleet or create a new fleet, and will limit options of existing fleets only if all shared characteristics match. Clicking “Save” will either add to an existing fleet, or create a new fleet, depending on what you choose, and allow you to specify details about that fleet.

Figure 174 Adding an Orphaned Asset to a Fleet

The screenshot shows a modal dialog titled 'Orphaned Asset'. It contains two sections: 'Add to Existing Fleet' and 'Create New Fleet'. The 'Add to Existing Fleet' section displays the message 'There are no fleets in the system that match this asset'. The 'Create New Fleet' section displays the message 'Click Save to create a new fleet based on this vehicle'. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

When you add the asset to a new fleet, if you wish to update fleet-specific details, look for the actions button, and click “Update this Fleet” to add details. Users also can remove the fleet completely, at which point all fleet assets will return to the Orphaned Assets portion of the Manage Fleets section. Users also can edit other fleet and asset-specific data such as NTD ID, asset odometer readings, and remove or add assets to the fleet from directly within the fleet.

Figure 175 Adding a New Fleet**Figure 176 Update Asset Fleet Details****Update Asset Fleet****NTD ID**

0

Agency Fleet ID**NTD Notes**

Notes will appear in generated NTD report.

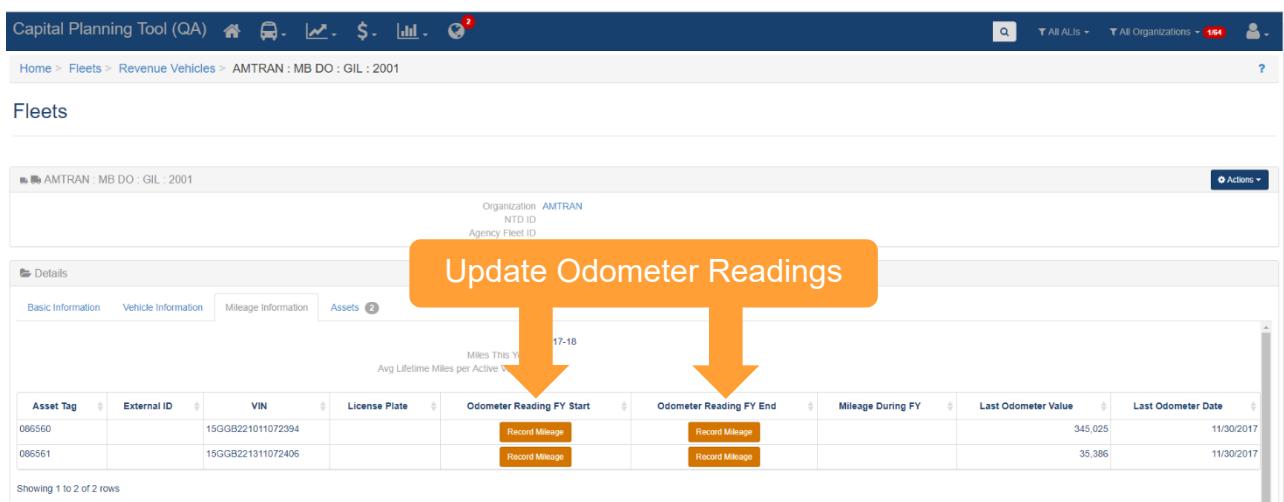
Update Asset fleet**Cancel****Figure 177 Update Odometer Readings**

Figure 178 Remove or Add Assets from within a Fleet

The screenshot shows a web-based application interface for managing fleet assets. At the top, there's a navigation bar with links for Home, Fleets, Revenue Vehicles, and specific filters for AMTRAN, MB DO, GIL, and 2001. Below this is a header for 'Fleets' with a sub-header for 'AMTRAN - MB DO - GIL - 2001'. The main content area displays a table of assets with columns for Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of data are shown: 086561 and 086560. The 'Action' column for each row contains a red minus sign and a green plus sign. An orange callout box with the text 'Add or Remove Assets' has an arrow pointing to the green plus sign in the last row.

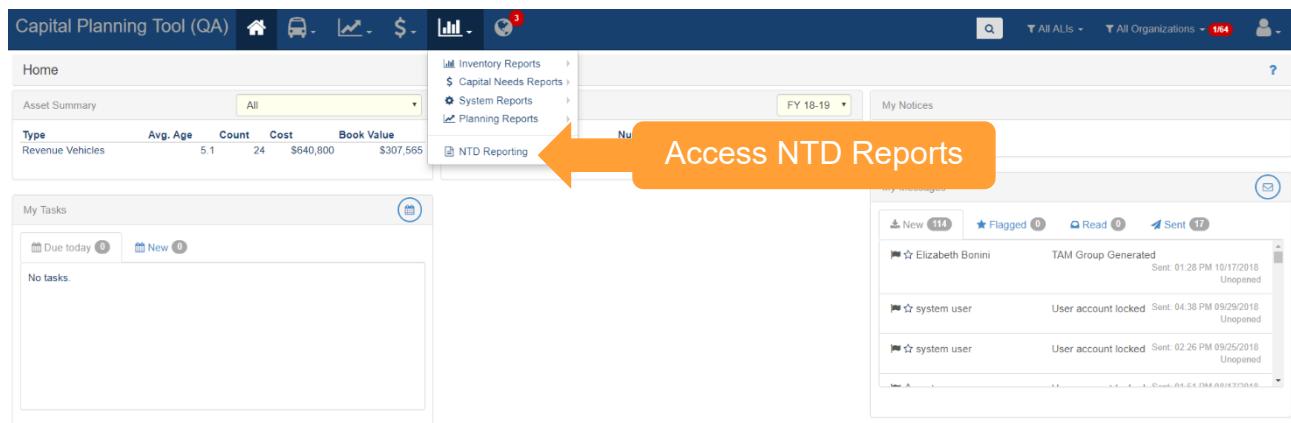
Asset Tag	External ID	VIN	License Plate	Title Number	Status	Emergency Contingency	ADA Accessibility	ULB	Mileage	Valid in Fleet	Action
086561		15GGB221311072406			In Service	No	No		35386	Yes	
086560		15GGB221011072394			In Service	No	No		345026	Yes	

12.2 NTD Asset Reports

The NTD Asset Reports are forms that must be submitted on an annual basis for every organization that receives Federal public transit funding. Required forms differ between organization, based on the category of assets in operation for each organization. The specific forms are as follows:

- Facilities (A-15) — Pulls asset data for primary facilities.
- Infrastructure (A-20) — Pulls asset data for infrastructure assets, and produces a separate report for each Primary Mode/Type of Service unique combination.
- Revenue Vehicles (A-30) — Pulls asset data for revenue vehicles, which are included as part of a fleet.
- Service Vehicles (Non-revenue) (A-35) — Pulls asset data for Service Vehicle (Non-Revenue), which are included as part of a fleet.
- Performance Measure Targets (A-90) — Pulls ULB, TERM value, and goal percentages for the TAM Policy associated with the corresponding NTD Report year, and calculates performance.

Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

Figure 179 Access NTD Reports

Any NTD reports that have been previously generated can be viewed on the initial report table available when clicking on the NTD Reports module. Existing report data can be accessed by clicking on the row for an individual organization upon which point it can be downloaded, submitted for review, have comments added, updated, or removed. New reports can be generated by clicking on the New NTD Form button.

Figure 180 Table of Previously Generated NTD Reports

Organization	Fiscal Year	Status	Created At	Creator
CARBON	FY 16-17	Unsubmitted	10:41 AM 10/19/2018	Elizabeth Bonini

Showing 1 of 1 rows

When you click on the “New NTD Form” button, you will be prompted to select an organization, reporting year, and enter other user-specific information. Upon clicking “Save NTD Form”, you will be directed to the newly created NTD Details and Data page.

Figure 181 Create New Reporting Year Forms

New NTD Report

Organization
BUTLER-Butler County Community Public Transportation

Fiscal Year
FY 2016 - 2017

Agency Information

Reporter Name
Elizabeth Bonini

Reporter Title

Reporter Department

Reporter Email
ebonini@pa.gov

Reporter Phone
9999999999

Reporter Phone Ext

Save NTD Form

Click Save NTD Form Button

Figure 182 NTD Report Details and Data

CARBON FY 16-17

Actions

Organization: CARBON
Year: FY 16-17
Status: Unsubmitted
Last Updated: 10:41 AM

submit this form

New version

Remove this form

Reporter Name: Elizabeth Bonini
Reporter Title: [empty]
Reporter Department: [empty]
Reporter Email: ebonini@pa.gov
Reporter Phone: (999) 999-9999

Date	Creator	Download	Comments	Process Log
10:41 AM 10/19/2018	Elizabeth Bonini	Unsubmitted	[empty]	[empty]

Submit, Create a New Version, or Remove

Access Forms or Add a Comment

When you click on the Download icon, the already generated forms appear and can be downloaded by clicking on the form-specific button. Excel file downloads will initiate upon clicking each form-specific button.

Figure 183 Download each NTD Form

Success

Click the button below to download the file to your computer.

Download A-15

Download A-20

Download A-30

Download A-35

13.0 Admin Tools

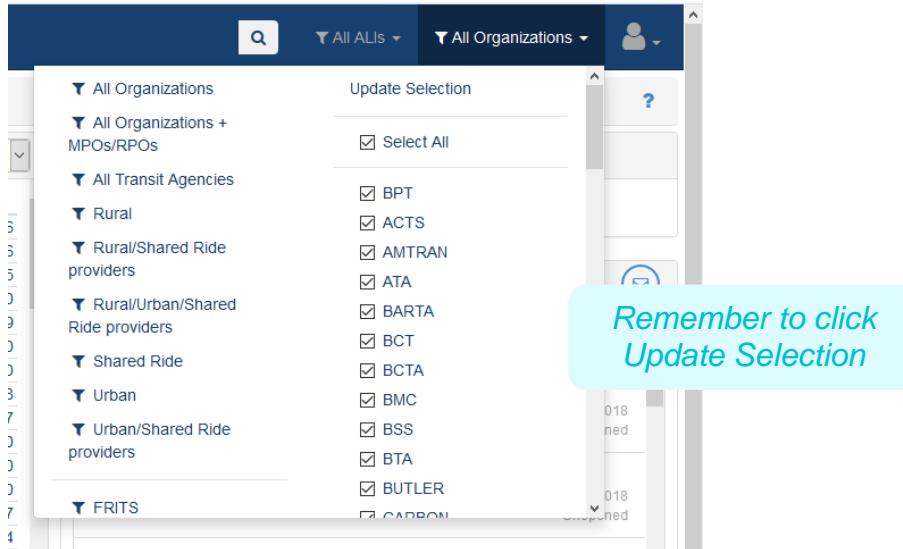
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

Figure 184 Admin User and Organization Options

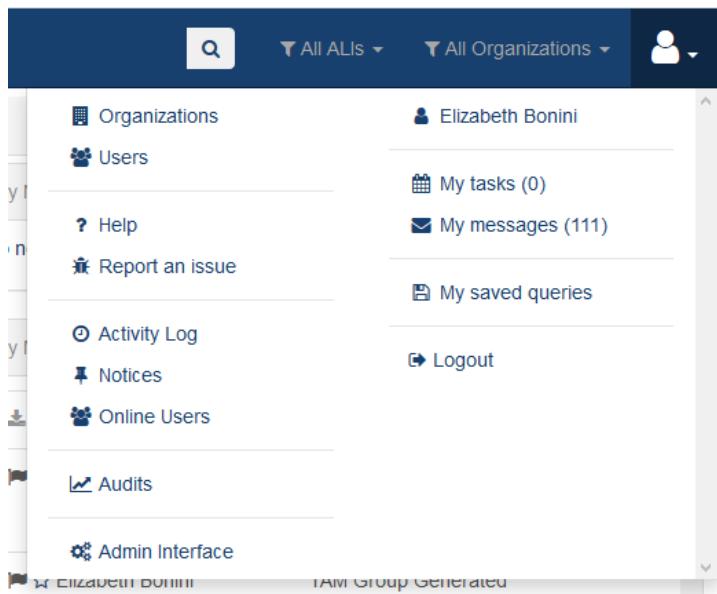


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

Figure 185 Organizations



In your User Options, you’ll also see some common elements with other users (though they have been revamped for admins) and some additional functionality.

Figure 186 Admin User Options

13.1 Organizations

The organizations page provides an overview of each organization, its type, and an interface for adding new agencies.

Figure 187 Admin Organizations

The screenshot shows the Admin Organizations page. At the top, there is a navigation bar with icons for Home, Organizations, and other tools. Below the navigation bar is a breadcrumb trail: 'Home > Organizations'. On the left, there are buttons for '+ New Transit Operator' and '+ New Planning Partner'. A dropdown menu labeled 'Agency Type' is open. An orange callout box with the text 'Add new organizations' points to a large orange button at the bottom left of the table area. The table itself has columns for Type, Organization, Name, Full Address, Phone, Ext, Fax, and Web Site. Two rows of data are visible:

Type	Organization	Name	Full Address	Phone	Ext	Fax	Web Site
Grantor	BPT	PaIDOT Bureau of Public Transportation	Keystone Building, 400 North St Harrisburg, PA, 17120	717-214-4035			http://www.dot.state.pa.us/internet/Bureaus/pdBPT.nsf/TransHomepage?openFrameset
		Transit Systems, Inc.	241 West Grant Street P.O. Box 189 New Castle, PA, 16103	(999) 999-9999			http://www.example.com

Click the buttons at the top to create a new Transit Operator or Planning partner.

Figure 188 Add an Organization

Corporate

* Name
[Text Input]

* Acronym
[Text Input]

External ID
[Text Input]

Governing Body Type
[Select Box]

Governing Body
[Text Input]

Indian Tribe
[Select Box]

FTA Recipient ID
[Text Input]

NTD ID Number
[Text Input]

* Agency Type
[Select Box]

Contact

* Phone
[Text Input]

Fax
[Text Input]

* Url
[Text Input]

* Address 1
[Text Input]

Address 2
[Text Input]

* City * State * Zip
[Text Input] PA [Text Input]

* Allowed Email Domains
To enter more than one domain, separate with |
[Text Input]

Services

Services Provided

- Aerial Tramway
- Alaska Railroad
- Bus
- Bus Rapid Transit
- Cable Car
- Commuter Bus
- Commuter Rail
- Demand Response
- Demand Response Taxi
- Ferryboat
- Heavy Rail
- Hybrid Rail
- Inclined Plane
- Jitney
- Light Rail
- Monorail/Automated Guideway
- Other Vehicles Operated
- Publico
- Streetcar
- Streetcar Rail
- Trolley Bus
- Trolleybus
- Unknown
- Vanpool

* Service Area
[Select Box]

Locations Served

- PennDOT District 1 (District)
- PennDOT District 2 (District)
- PennDOT District 3 (District)

13.2 Users

The users page also has some additional functionality. It provides an overview of all users in the system, and provides the ability to add new users or filter user data.

Figure 189 Admin Users

Home > Users

Add a user Any role/privilege... INITIALS/FIRST/LAST/EMAIL/TITLE Show Active Users Only Search

Organization	Title	First	Last	Email	Phone	Role	Privileges	Num Logins	Last Login	Locked	Active	Created At
BPT		Nicholas	Baldwin	nbalduin@pa.gov	717-787-1209	BPT Staff	BPT Manager	200	11:52 AM 07/20/2018		✓	12:01 PM 03/07/2016
BPT		Batson		abatson@bakerintl.com	717-221-2060	BPT Staff		72	02:03 PM 05/04/2018		✓	10:32 AM 05/05/2016
BPT		Birger		jbirger@camsys.com	617-123-4567	Guest		9	09:54 AM 06/01/2015		✓	03:20 PM 05/28/2015
BPT		Bonini		ebonini@pa.gov	(999) 999-9999	BPT Staff	Admin TAM Group Lead	325	10:51 AM 07/20/2018		✓	03:20 PM 05/28/2015

Click “Add a User” to create an account for a new user. An email requesting the user reset his/her password will be automatically sent upon creation.

Figure 190 Add a User

New User

User Organizations

* Organization: Not Selected

Organizations:

- BPT-PennDOT Bureau of Public Trans.
- ACTS-Allied Coordinated Transportat.
- AMTRAK-Altoona Metro Transit
- ATA-Area Transportation Authority of K
- BARTA-Berks Area Regional Transport
- BCT-Bucks County Transport, Inc.
- BCTA-Beaver County Transit Authority
- BMC-Borough of Mt Carmel
- BSS-Blair Senior Services, Inc.
- BTA-Butler Transit Authority
- BUTLER-Butler County Community Pul
- CARBON-Carbon County

Choose All >

Selected:

Roles & Privileges

* User Role: None

User Privileges:

- Admin
- Technical Contact
- Director Transit Operations
- NTD Contact

User Details

* First Name: None

* Last Name: None

Take care about who you grant admin privileges—they'll be able to modify anything

13.3 Notices

Notices provide information on the dashboard to user-defined sets of other users. The Notices interface manages this process.

Figure 191 Notices

Type	Subject	Summary	Visible	Start Display	Display Until	Actions
System Notice	Welcome to the Capital Planning Tool.	IMPORTANT NOTICE!		01:00 PM 06/02/2015	11:59 PM 06/02/2015	
System Notice	System Maintenance	System Maintenance Monday July 6th		01:00 PM 07/02/2015	11:59 PM 07/02/2015	
System Notice	IMPORTANT NOTICE!	Asset Loading		07:00 AM 12/07/2015	11:00 PM 12/14/2015	
System Notice	System Maintenance	System Maintenance		10:00 AM 02/26/2016	11:00 PM 02/29/2016	
System Notice	SYSTEM NOTICE	System Outage - 9/10/16-9/12/16		10:00 AM 09/09/2016	11:59 PM 09/09/2016	
Informational Notice	2017 AUDIT PERIOD	2017 Revenue Vehicle Audit		02:00 PM 01/04/2017	11:59 PM 01/04/2017	
System Notice	SYSTEM NOTICE	System Outage - 2/10/17-2/13/17		02:00 PM 02/10/2017	08:00 AM 02/13/2017	
System Notice	SYSTEM OUTAGE	System Outage - 7/21 to 7/24		02:00 PM 07/19/2017	08:00 AM 07/24/2017	
System Notice	SYSTEM OUTAGE	System Outage - 11/17 to 11/20		08:00 AM 11/14/2017	07:00 AM 11/21/2017	
System Notice	SYSTEM OUTAGE	SYSTEM OUTAGE 11/30 5PM-6PM		03:00 PM 11/30/2017	11:00 PM 11/30/2017	
System Notice	SYSTEM OUTAGE	System Outage - 12/29-1/2		01:00 PM 12/28/2017	11:00 AM 01/03/2018	
System Notice	SYSTEM OUTAGE	System Outage - 1/26-1/29		01:00 PM 01/26/2018	07:00 AM 01/29/2018	
System Notice	test	test		12:00 AM 07/20/2018	01:00 PM 07/20/2018	

Showing 1 to 13 of 13 rows 200 ▾ rows per page

Click Add a notice to create a new one. You can specify temporal and organization parameters.

Figure 192 Add a Notice

New Notice

* Subject

* Summary

Details

Organization

All

* Start Displaying

07/20/2018 Hour 12:00 PM

Stop Displaying

07/20/2018 Hour 11:00 PM

* Notice Type

System Notice

Create Notice

Once a noticed is created, it will display on the dashboard according to the parameters set.

Figure 193 Notice on the Dashboard

My Notices

A test 12:00 AM 07/20/2018 Details...

My Messages

9 536 786 775 280

13.4 Online Users

Administrators can see active user sessions and details about those logins, by accessing the Users link within the User Menu.

Figure 194 Active Users

Session Id	User	IP Addr	Organization	Started	Expires	Age	Last View Time	Inactive Time	View Count	Last View
fa72aadd0738752943871b731d54dcf0	Elizabeth Bonini	74.75.225.138 BPT		01:59 PM 07/12/2018	10:53 PM 07/12/2018	7 days 22h 30m	05:53 PM 07/12/2018	7 days 18h 36m	696	/notifications/count
5eeba2509d607833bd955f9fb5bb756f	Elizabeth Bonini	72.94.199.38 BPT		01:59 PM 07/12/2018	08:43 PM 07/12/2018	7 days 22h 30m	03:43 PM 07/12/2018	7 days 20h 46m	626	/notifications/count
b8de20b814a0c0fc12f86826af448cc4	Elizabeth Bonini	73.219.188.37 BPT		01:59 PM 07/12/2018	02:27 AM 07/13/2018	7 days 22h 30m	09:27 PM 07/12/2018	7 days 15h 2m	1,841	/notifications/count
97ce63ac5f8ab1db8f396ec91b4f5c38	Elizabeth Bonini	209.6.55.63 BPT		01:58 PM 07/13/2018	12:49 AM 07/14/2018	6 days 22h 31m	07:49 PM 07/13/2018	6 days 16h 41m	1,286	/notifications/count
597442dc0ba05a002eb54e0bf4d1b5c0	Elizabeth Bonini	72.94.199.38 BPT		10:24 AM 07/16/2018	11:49 PM 07/16/2018	4 days 2h 5m	06:49 PM 07/16/2018	3 days 17h 40m	3,144	/notifications/count
a450046b60018305995392319c1781d6	Elizabeth Bonini	73.219.188.37 BPT		10:54 AM 07/16/2018	05:06 PM 07/16/2018	4 days 1h 35m	12:06 PM 07/16/2018	4 days 23m	92	/notifications/count
17c28a3fc8b598e3924b1236a7218191	Elizabeth Bonini	74.75.225.138 BPT		10:58 AM 07/16/2018	09:57 PM 07/16/2018	4 days 1h 31m	04:57 PM 07/16/2018	3 days 19h 32m	3,214	/notifications/count
09baecbb50cc11679481d1102fb252	Elizabeth Bonini	209.65.164.27 BPT		11:14 AM 07/16/2018	09:14 PM 07/16/2018	4 days 1h 15m	04:14 PM 07/16/2018	3 days 20h 40m	1,354	/notifications/count
2b1536f075759fa78ed6a18377d0924a	Elizabeth Bonini	72.94.199.38 BPT		02:39 PM 07/16/2018	07:49 PM 07/16/2018	3 days 21h 50m	02:49 PM 07/16/2018	3 days 21h 40m	81	/notifications/count
09fe1e7c64c4f95a8befff3d4496923d	Nicholas Baldwin	72.94.199.38 BPT		02:49 PM 07/16/2018	07:53 PM 07/16/2018	3 days 21h 40m	02:53 PM 07/16/2018	3 days 21h 37m	26	/notifications/count

13.5 Audits

Administrators can perform audits to assist in monitoring periodically required asset updates. As an example, you may establish a rule where all assets need to have Service Status, Condition, and Mileage (where appropriate) updated every year. These rules can be setup within the Audit Feature. When the audit is run on, the system will check that each asset has had its Service Status, Condition, and Mileage (where appropriate) updated within a given date range.

The admin audits page summarizes all available Audits and can be accessed through the Audits link within the User Menu.

Figure 195 Admin Audits Page

Name	Description	Instructions
Annual Inventory Update	Checks to see that each asset has had the Service Status, Condition, and Mileage (where appropriate) updated.	Update the Service Status, Condition, and Mileage (where appropriate) values for each of the operational assets in your inventory.

Clicking on the audit from the table will bring you to the detail page of that audit, where you can update or remove the audit.

Figure 196 Admin Audits Details Page

Audits > Annual Inventory Update

		Description	Instructions
<input type="checkbox"/> Annual Inventory Update	<input checked="" type="checkbox"/> Update this audit		
Name	Annual Inventory Update	Auditor	AssetA
Active ✓			
Data Update Start Date	11/13/2017	Data Update End Date	01/24/2018
Operational			
Audit Activity Start Date	09/30/2017	Audit Activity End Date	03/30/2018
Last Run			
Created On	02/28/2016	Last Updated	03/19/2018

13.6 Client Admin Interface

The Client Admin Interface is the location where users with the Client Admin privilege have the ability to modify certain client-controlled features, to include areas such as annual system rollover, system generated messages templates, and a message history log.

The functionality within the Client Admin Interface will be expanded over time. As existing features are updated and new modules and features are added, existing functionality within the System Admin Interface will migrate to and new functionality will be added to the Client Admin Interface.

Figure 197 Client Admin Interface

Home > Client Admin Interface

User Guide ?

Client Admin Interface

System Management

Administration

System Rollover

Messages

13.7 System Admin Interface

The System Admin Interface is a graphic representation of some of the databases used within the system. From here, you can adjust the content that is displayed in the various interfaces. For instance, you can adjust what capital project types are displayed in the dropdown when adding a new capital project.

Be very careful when modifying or deleting any of the information in the System Admin Interface, as much of the system functionality resides within the System Admin Interface, and any changes made may cause systemwide data inaccuracies. Always consult your primary Cambridge Systematics (CS) point of contact should you wish to make modifications to the System Admin Interface, or are unsure of how to perform a specific function.

Figure 198 System Admin Interface

