TransAM

Administrative User

User Guide

prepared for

Southern California Association of Governments (SCAG)

prepared by

Cambridge Systematics, Inc.

Updated as of Release 2.7.0

user guide

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date

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1.0 Welcome!

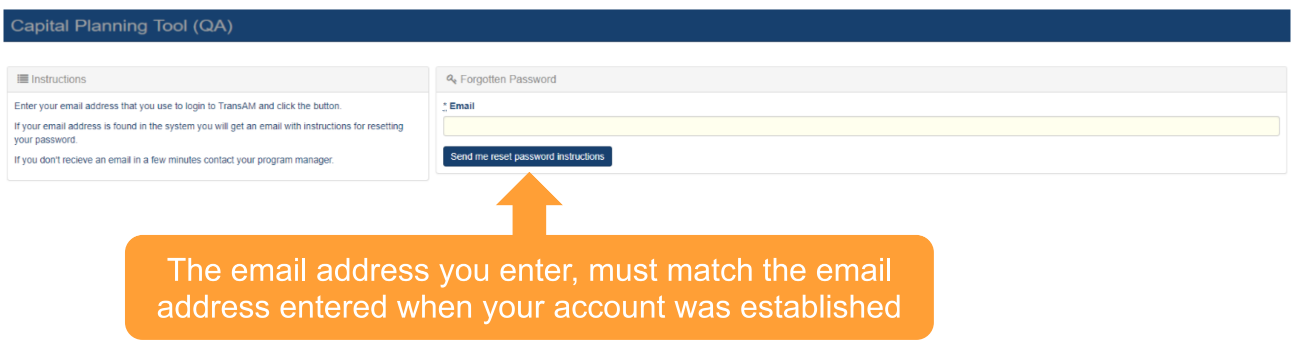
TransAM is an asset management system designed to support the needs of State DOTs, Planning Agencies, and Transit Agencies. The system manages assets of all types, including revenue vehicles, equipment, facilities, and infrastructure. The system stores crucial information about every asset category and 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.

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

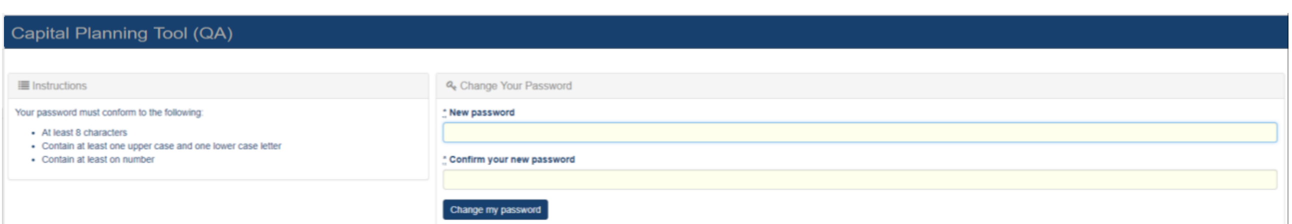
If this is your first time logging in, you should receive an email following the creation of your user account, with a link instructing you to reset your password. Click the link in the email and you will be directed to enter your email address in order to reset your password; enter your email address 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



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

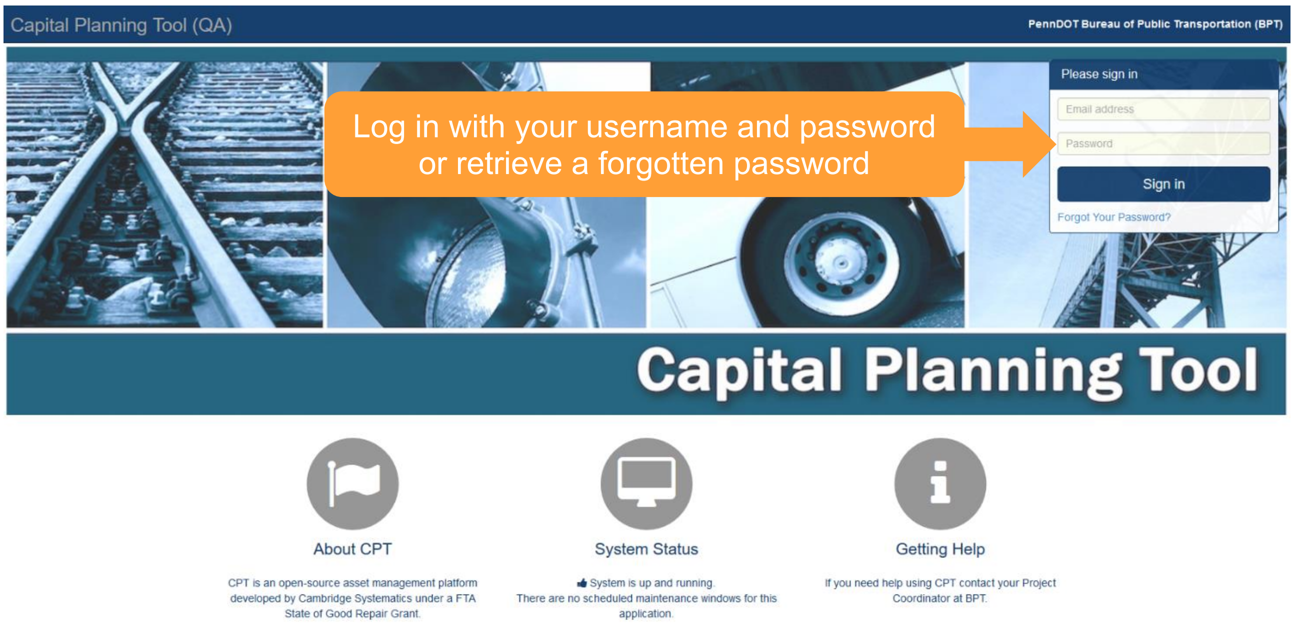


1.2 Ongoing Site Access

The system can be accessed via the following URL: https://transam-scag.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



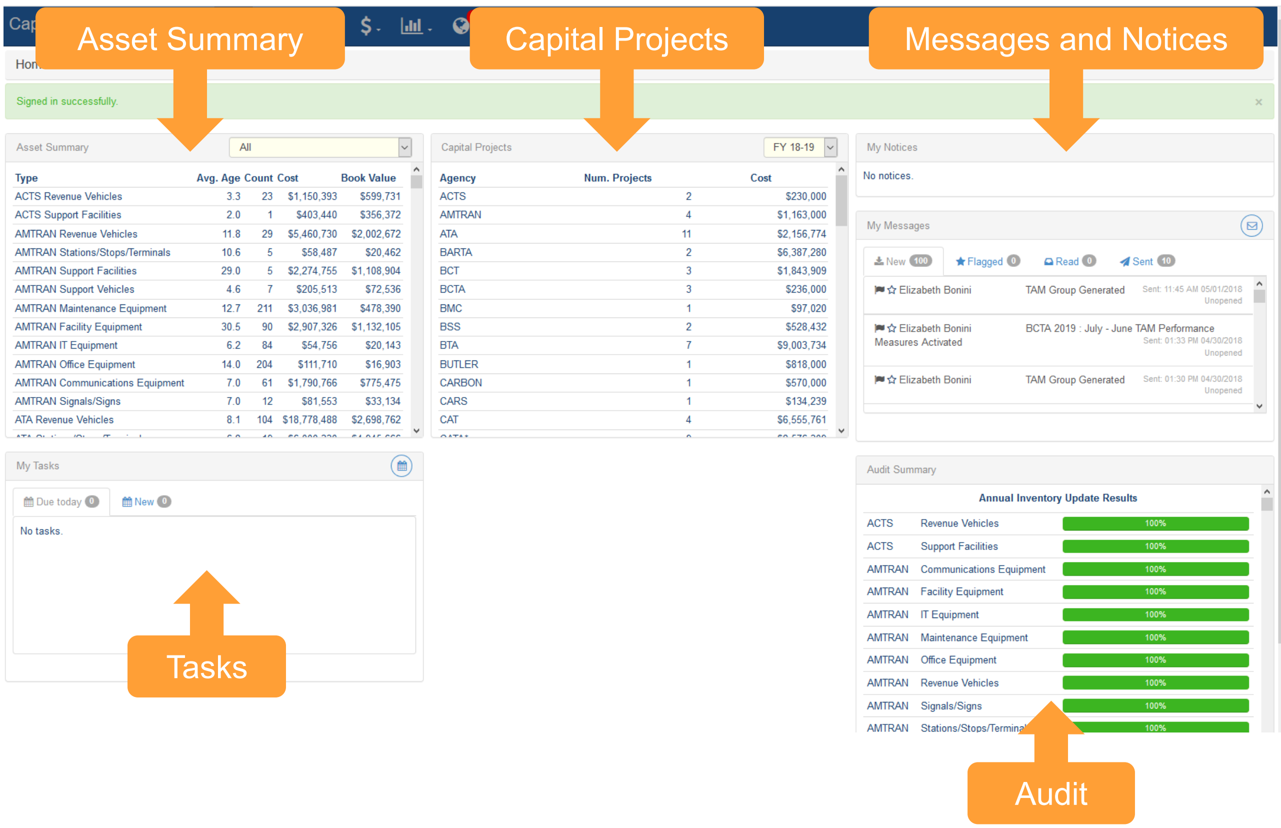
2.0 Dashboard

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.

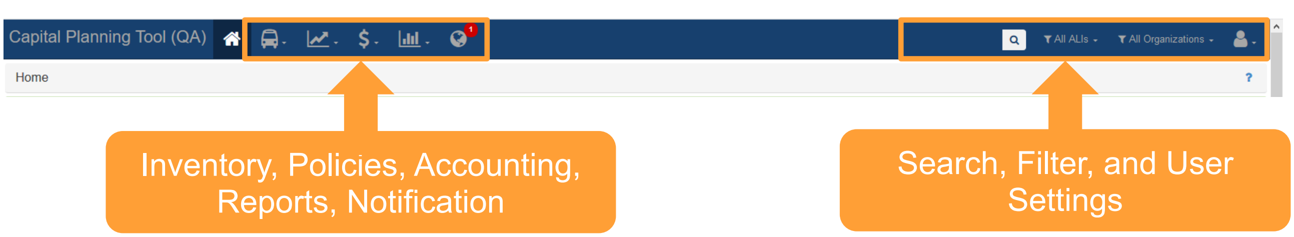
Figure 4 Dashboard Elements



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

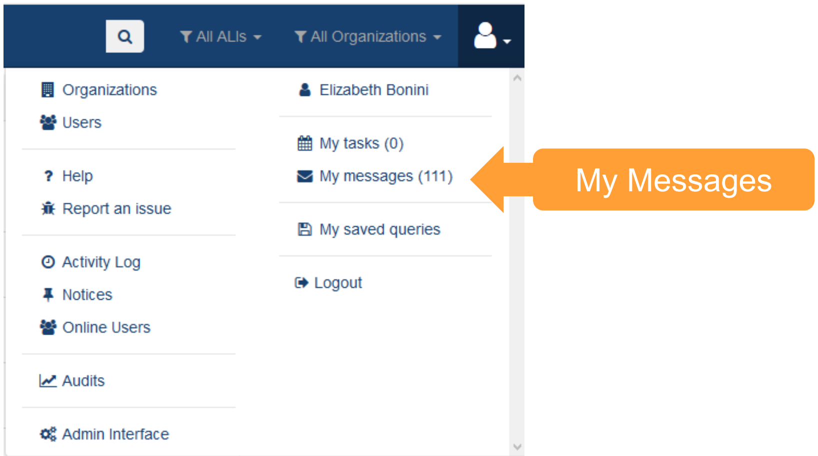
Throughout the site, there are various opportunities to filter data. When you see the following icon it means you can pare down displayed data with a filter.

Figure 9 Filter Icon

3.3 Messages

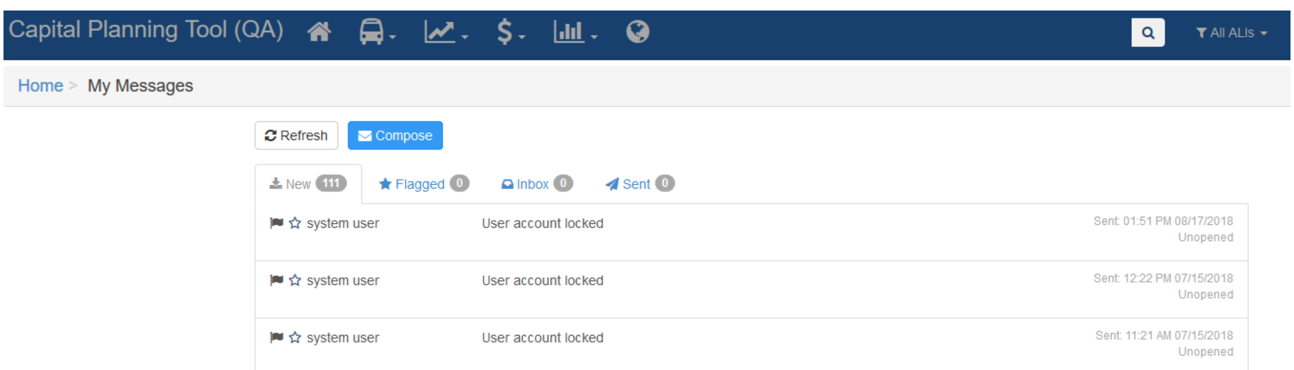
You can access Messages through the User Profile drop down menu.

Figure 10 User Profile *Messages*



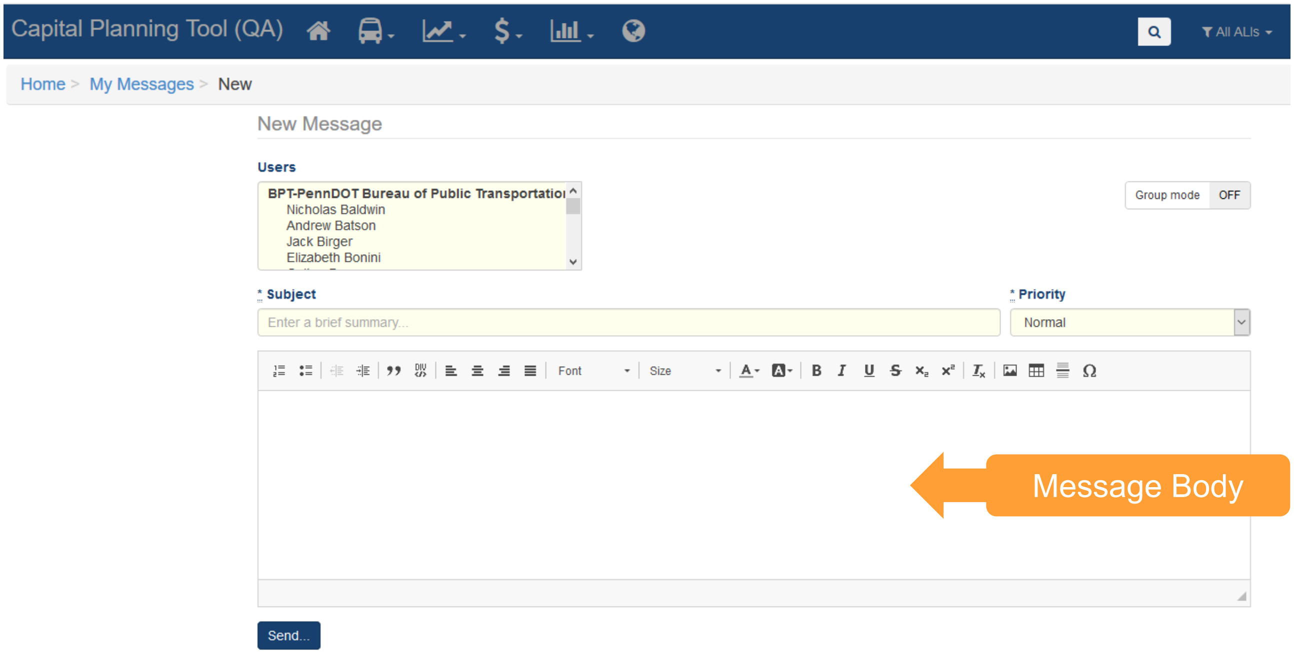
Users are able to send and receive messages to one or more users through the interface.

Figure 11 Messages



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.

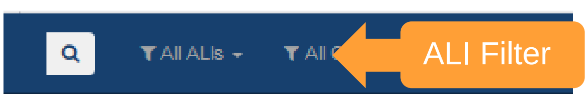
Figure 12 Message Interface



3.4 Activity Line Item (ALI) Filter

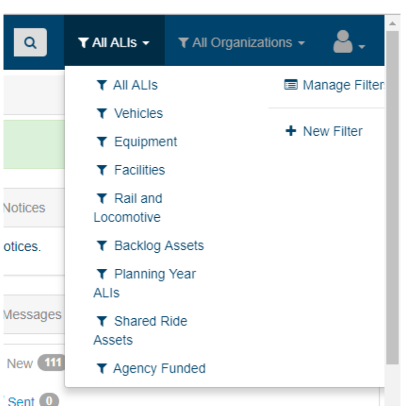
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

Figure 13 ALI Filter



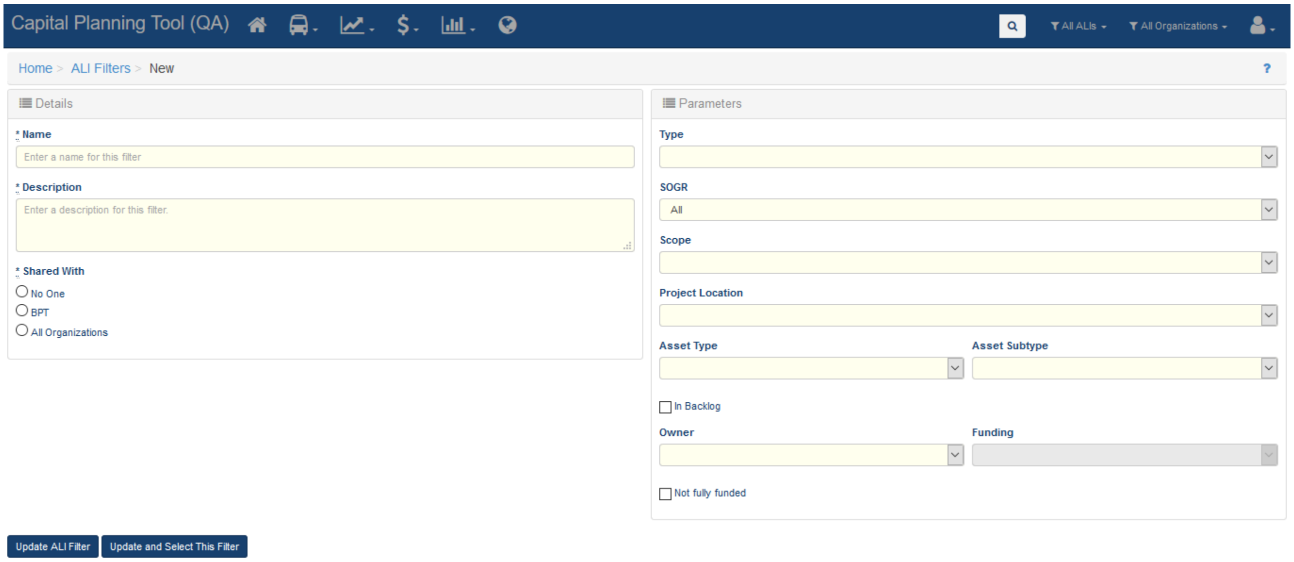
You can filter with prepopulated selections or create your own filters.

Figure 14 ALI Filters



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

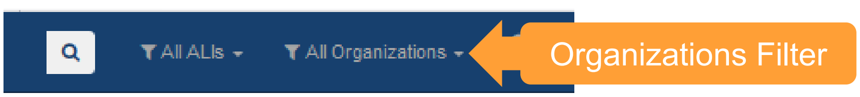
Figure 15 New ALI Filter



3.5 Organizations Filter

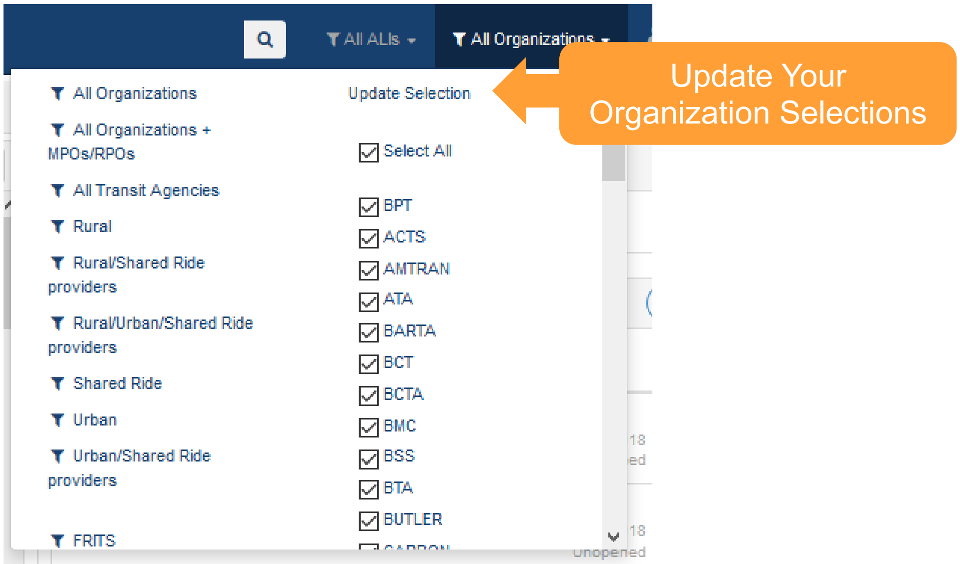
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

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

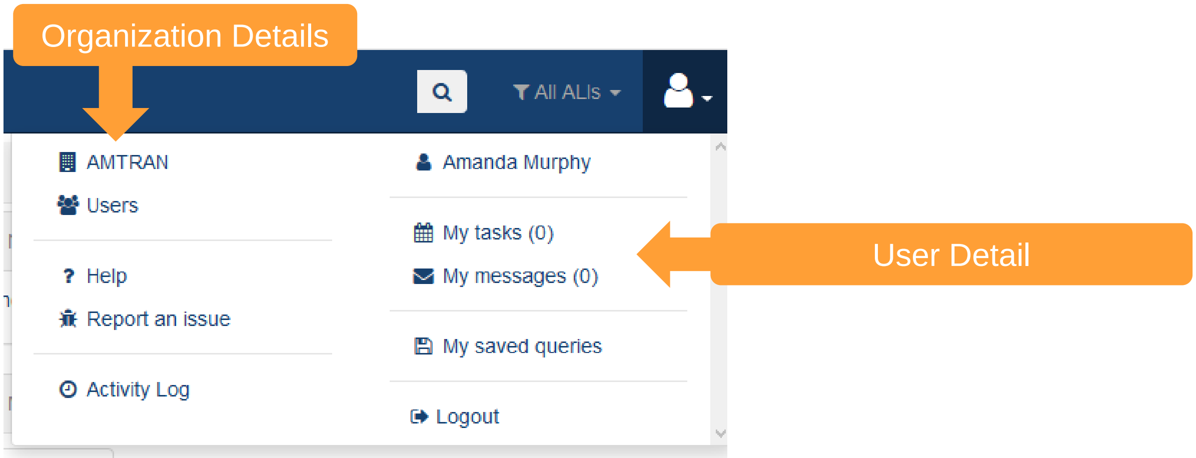
3.7 User and Organization Options

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

Figure 19 User Menu

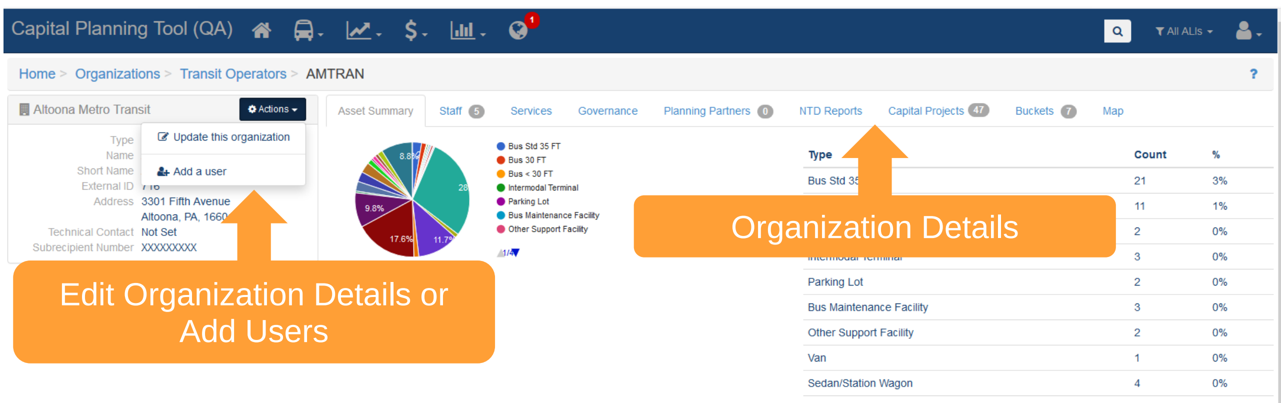
From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

Figure 20 User Menu Dropdown



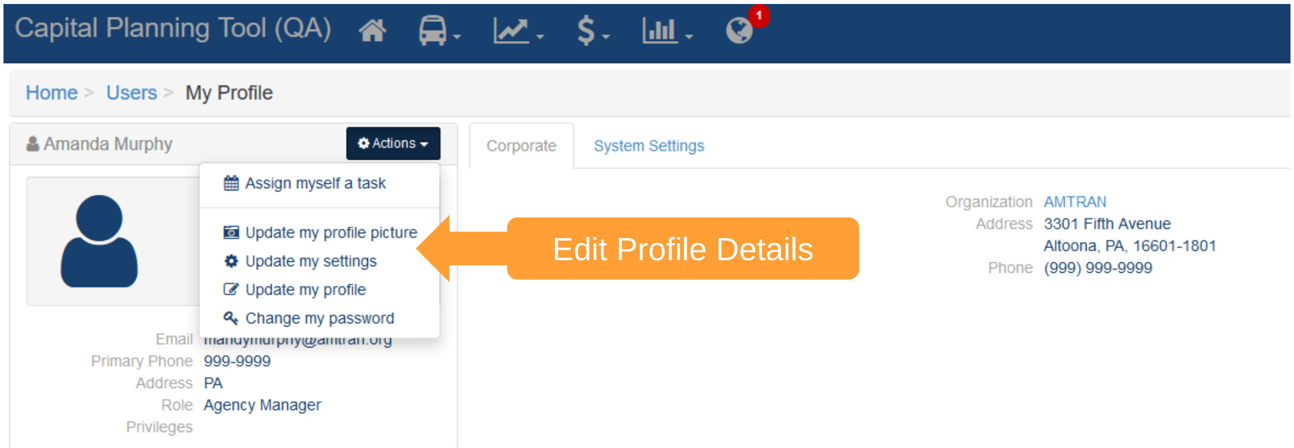
Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

Figure 21 Organization Details



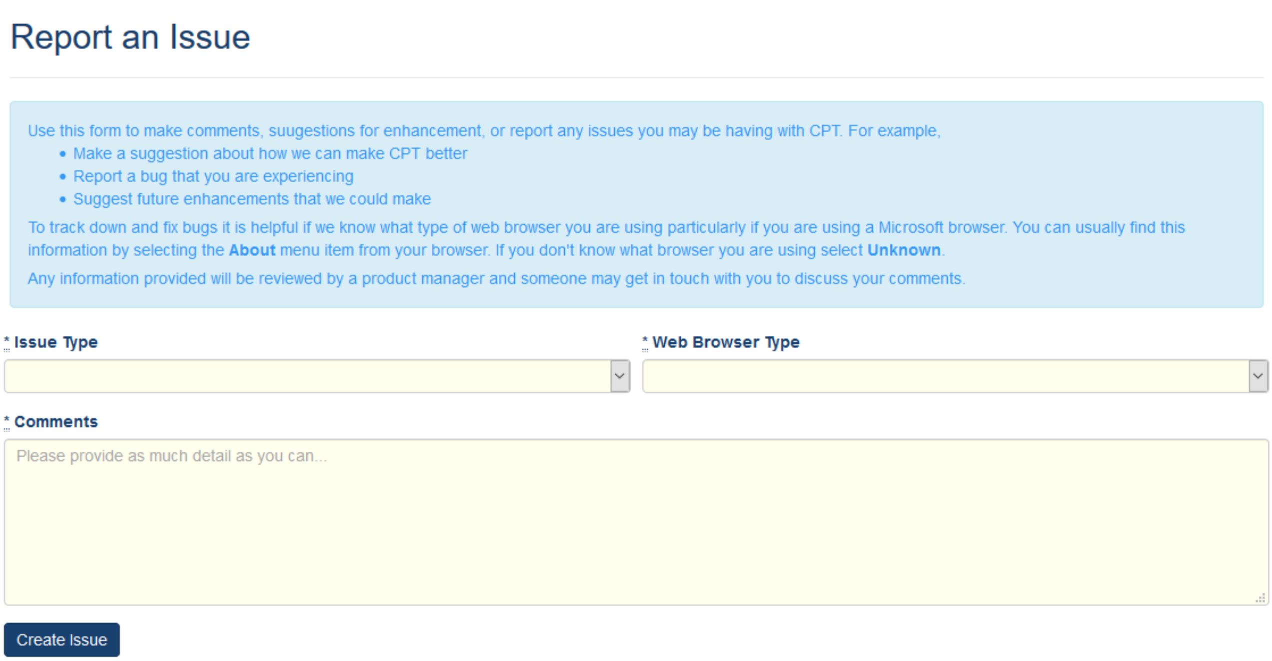
If you click your own name, you can see details about your profile and edit them. You also can assign yourself a task to complete.

Figure 22 Profile Details



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.

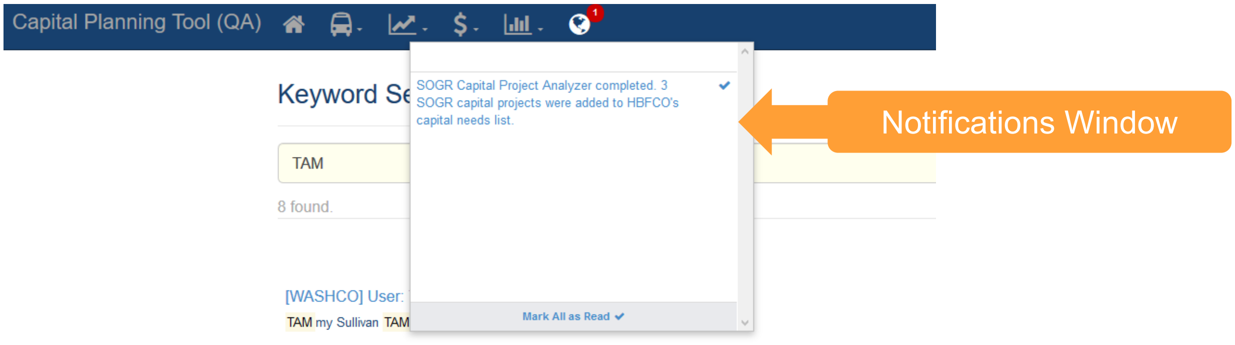
Figure 23 Report an Issue



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.

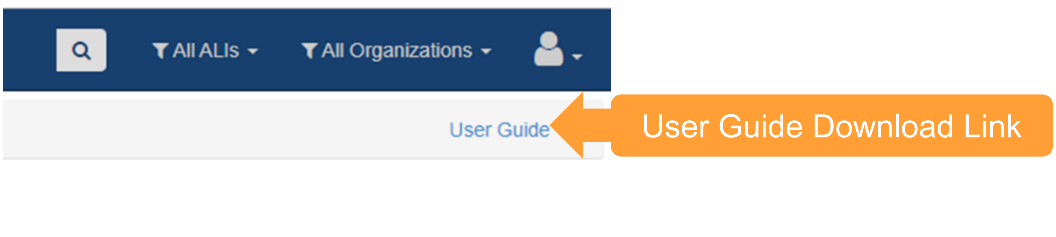
Figure 24 Notification Drawer



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

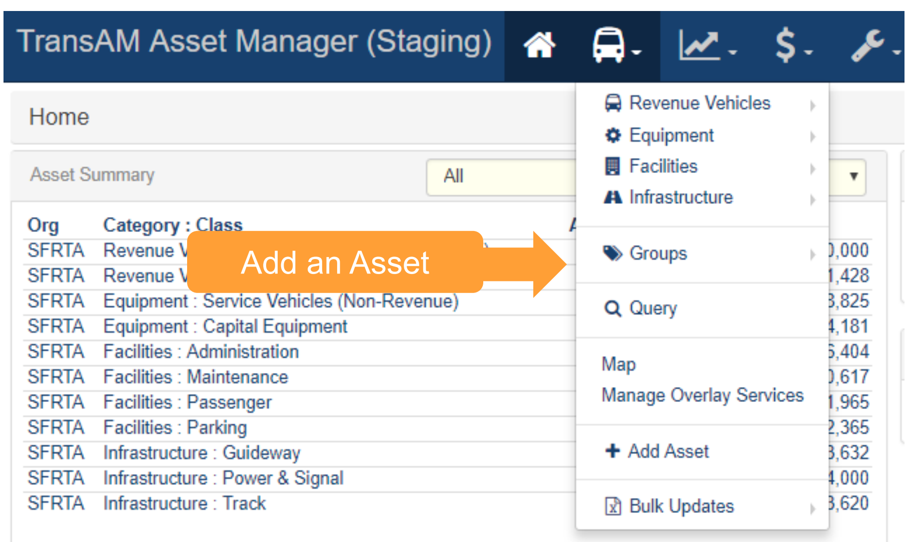
Management of organization assets is carried out through the Asset Inventory dropdown menu. It contains a variety of tools and functions that streamline asset management.

Figure 26 Asset Inventory Dropdown

4.1 Add an Asset

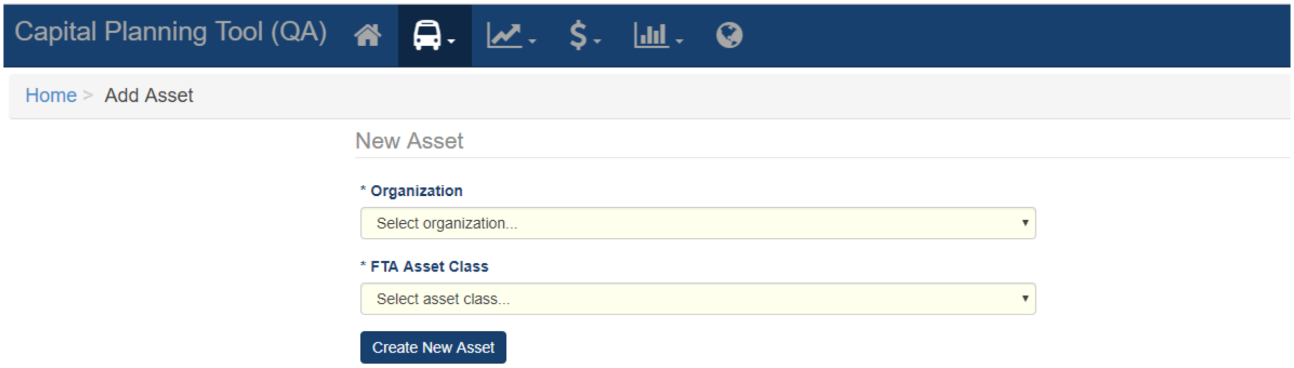
Adding new assets to the asset inventory is simple. First select “Add Asset” from the Asset Inventory dropdown.

Figure 27 Adding an Asset



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

Figure 28 Select the Organization and Asset Class



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

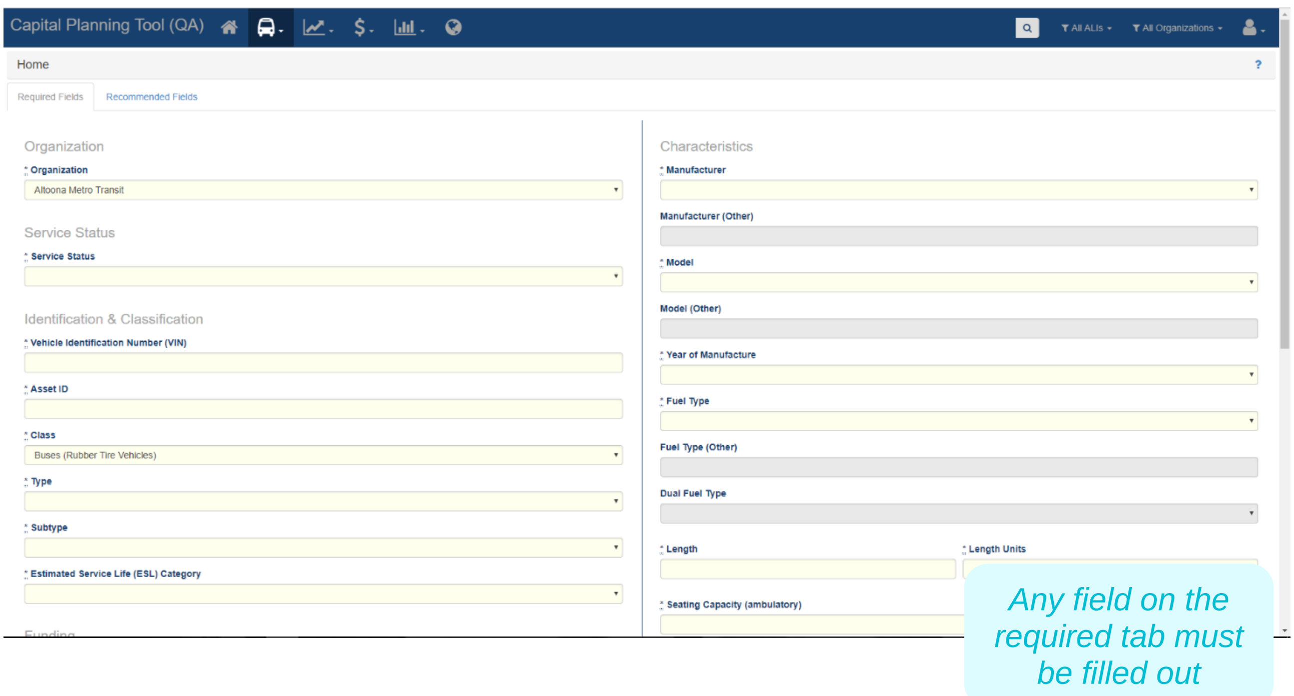
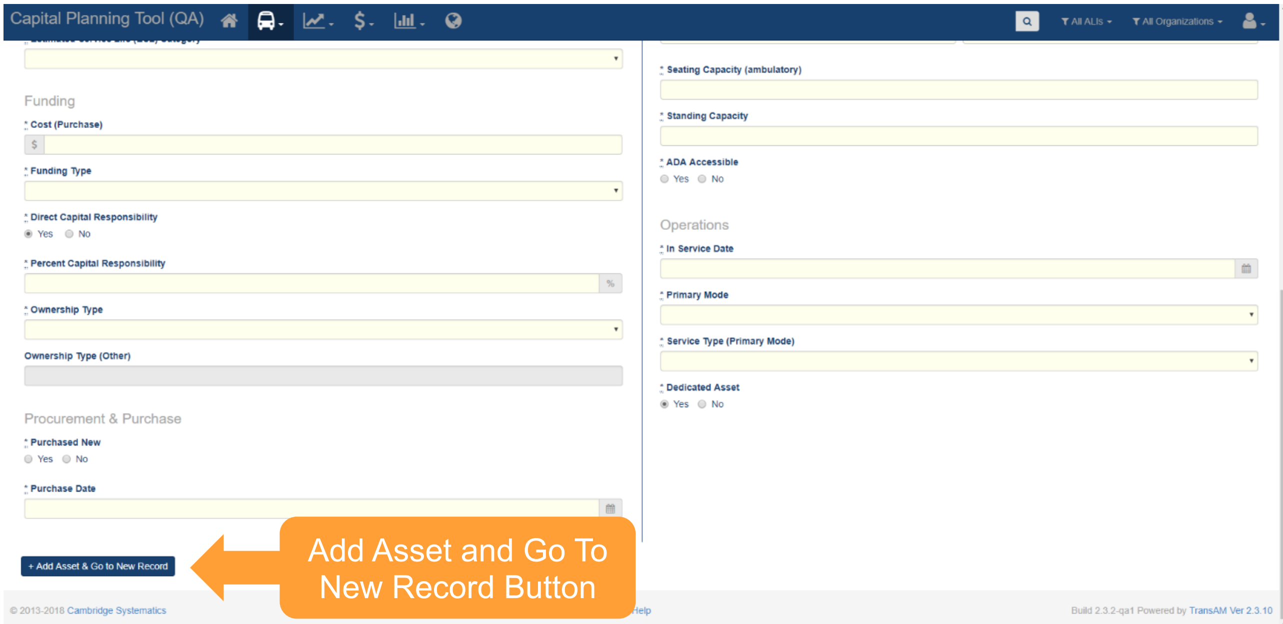


Figure 30 Add the Asset and Go To The New Record

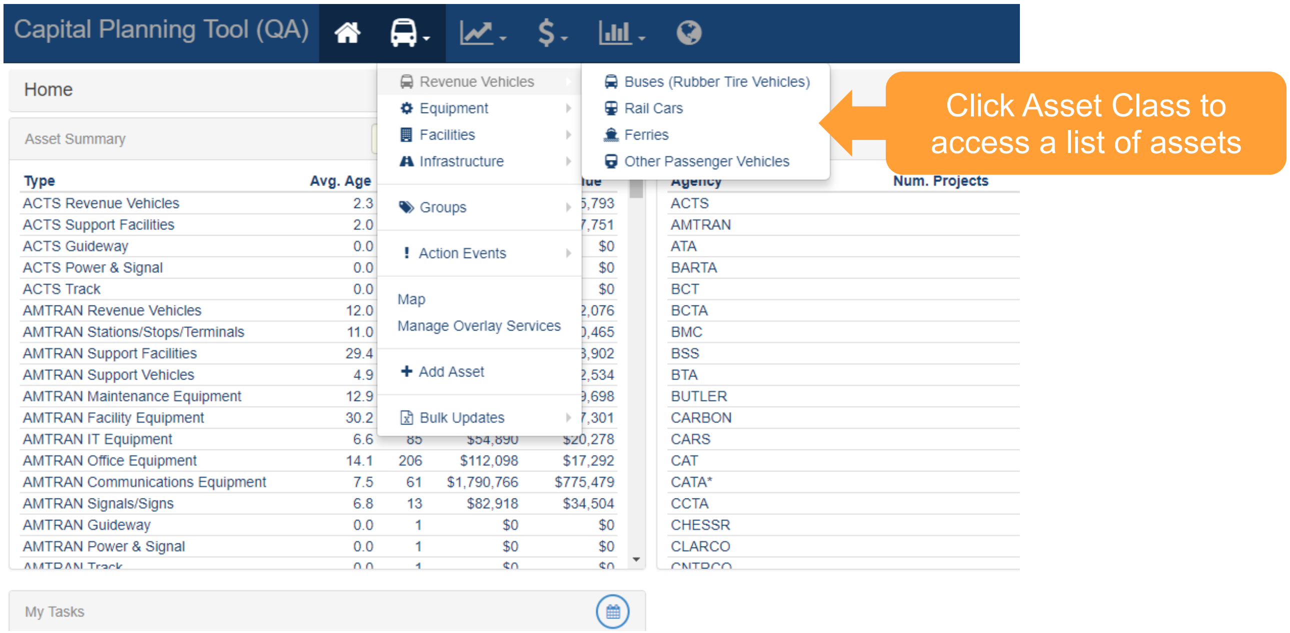


4.2 Accessing Existing Assets

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.

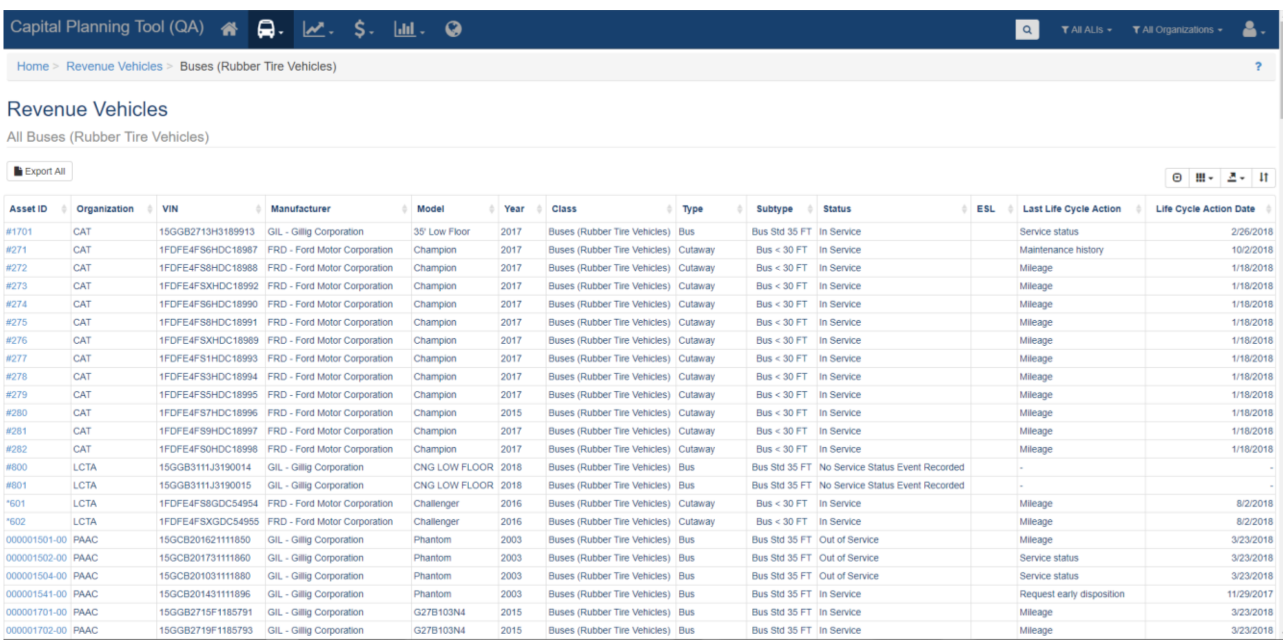
Clicking on an asset class will drill down on the assets an organization possesses within that particular category and class.

Figure 31 Existing Assets



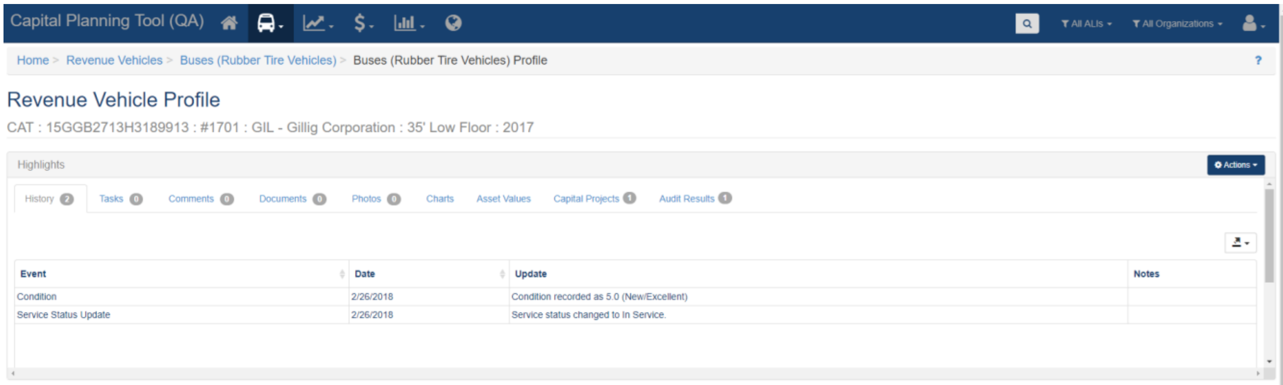
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 32 Existing Asset Interface



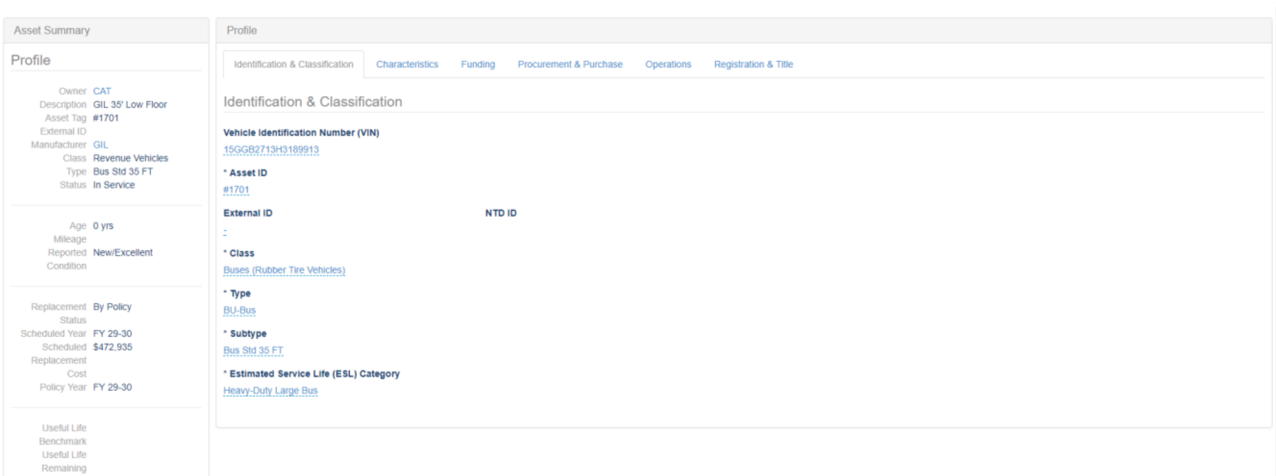
When you access the specific asset record, users can view the highlights section. The highlights sections contains asset summary information such as: a history log, location information, asset charts, asset value information, associated capital projects, and audit results. In addition, tasks, comments,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

Figure 33 Asset Record: Highlights



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

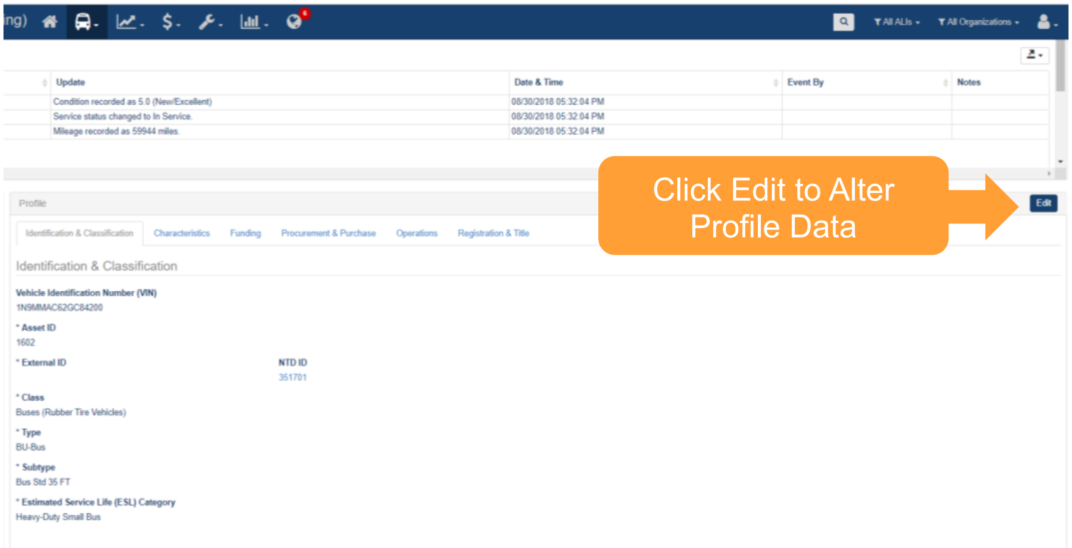
Figure 34 Asset Record: Profile and Summary



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



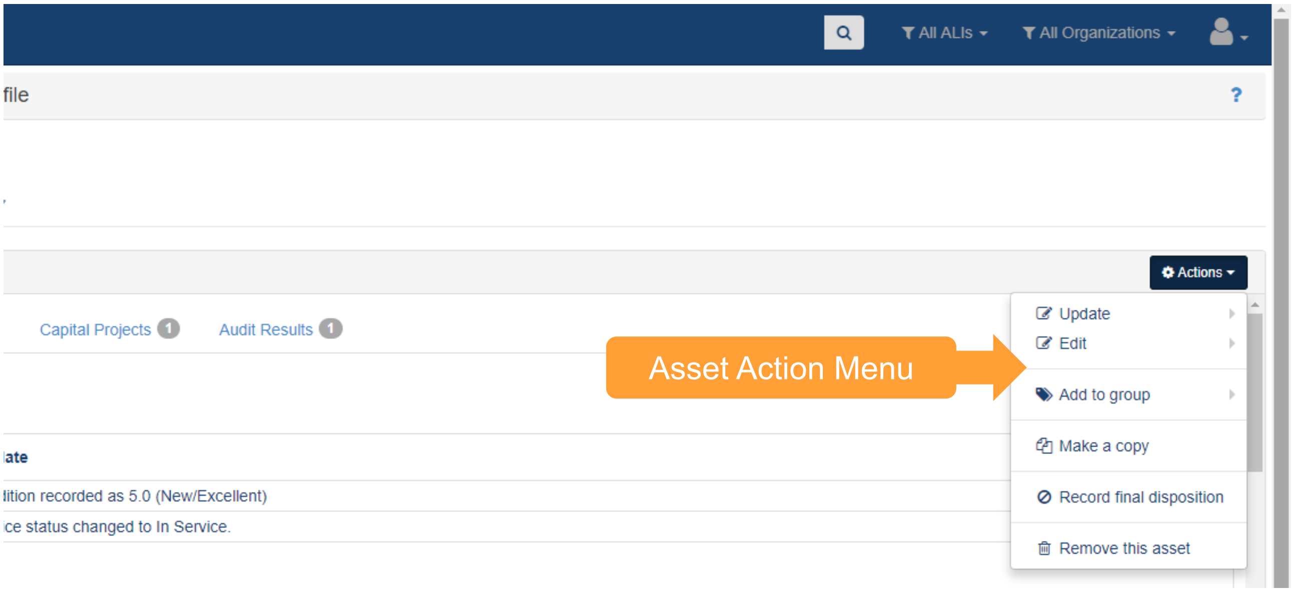
4.4 Updating Existing Asset Lifecycle Data

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

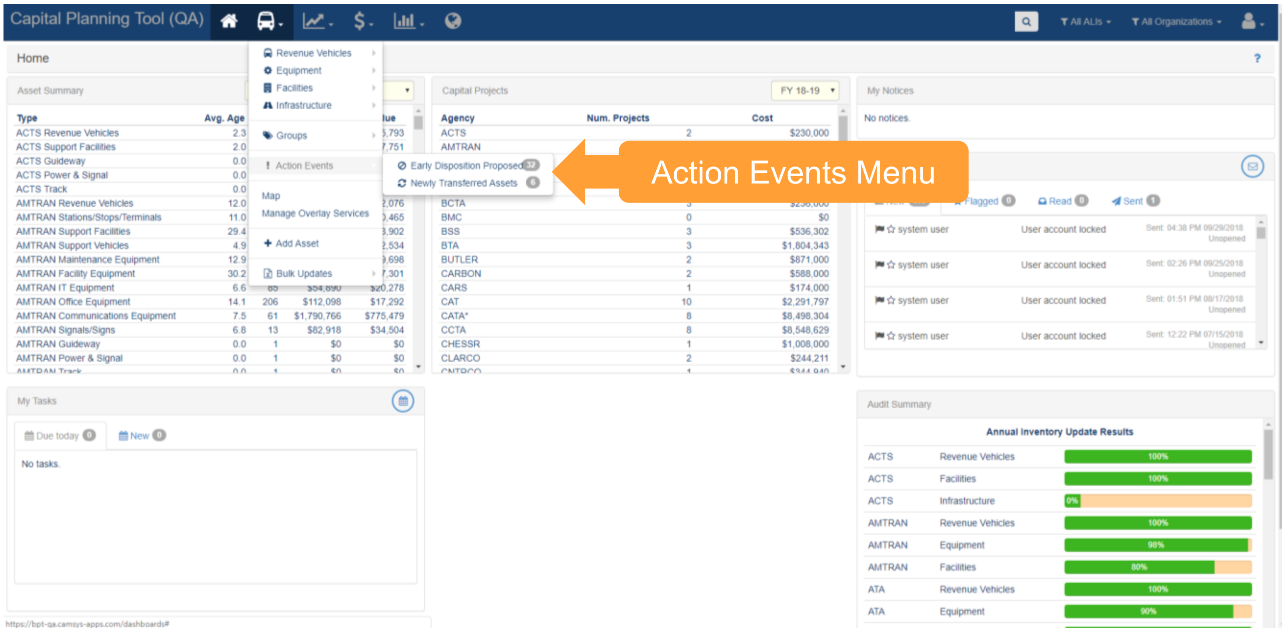


4.5 Action Events (Disposition and Transfer Review)

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)

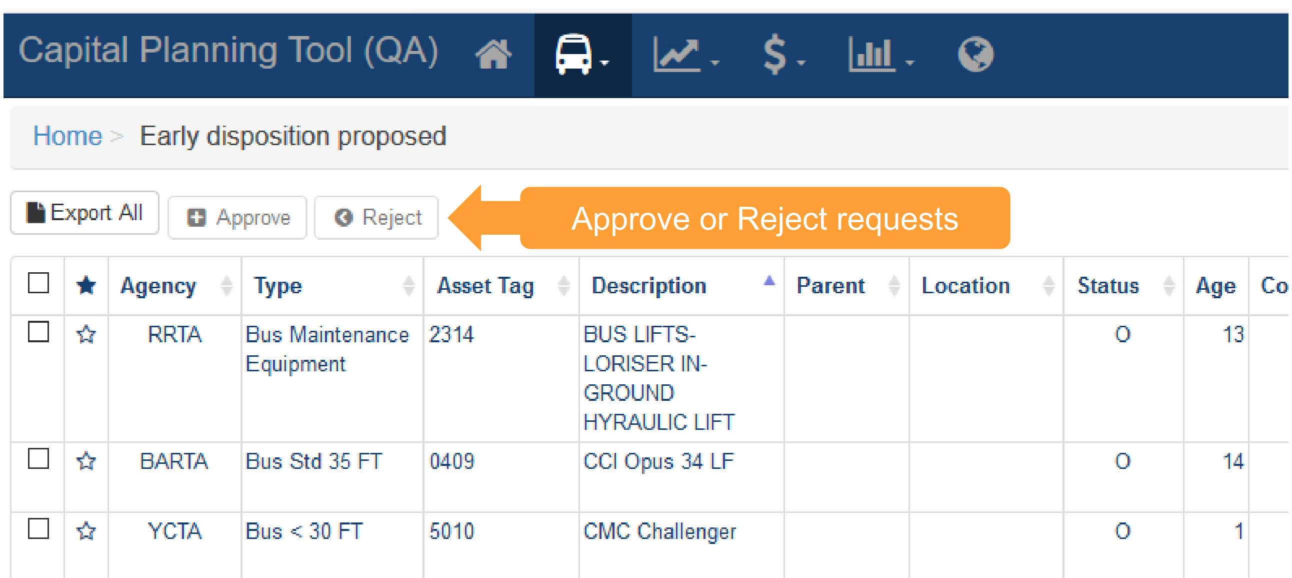


An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

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.

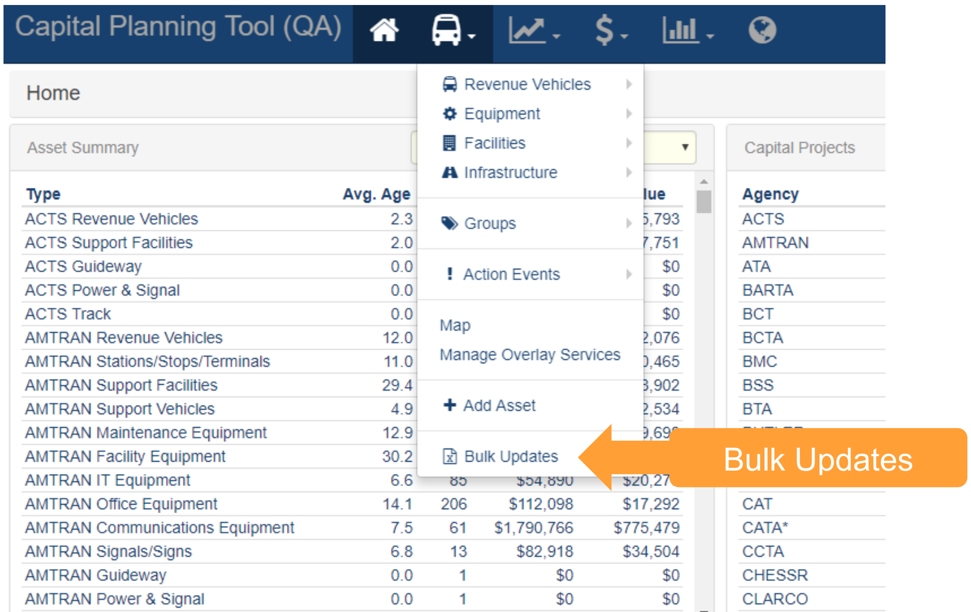
Figure 38 Early Disposition Requests



4.6 Adding or Updating Assets by Bulk Update

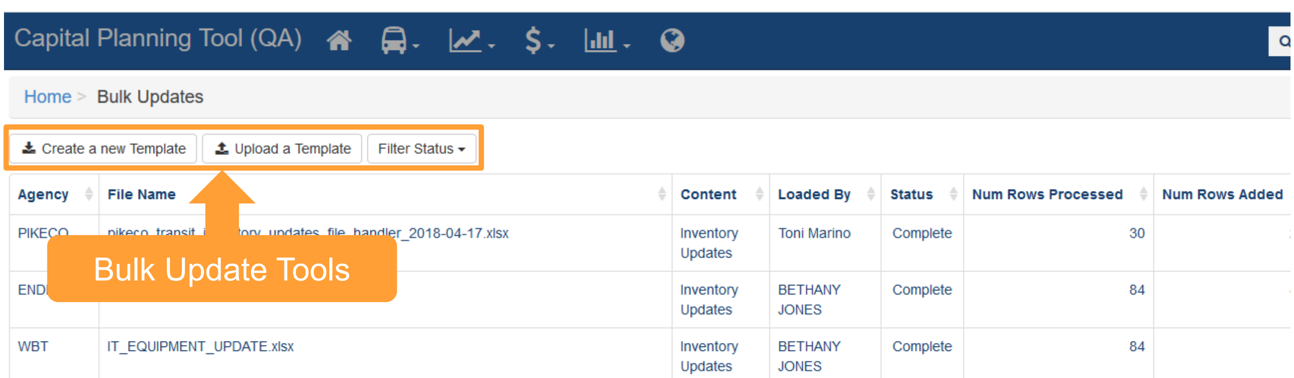
Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be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

Figure 39 Bulk Updates



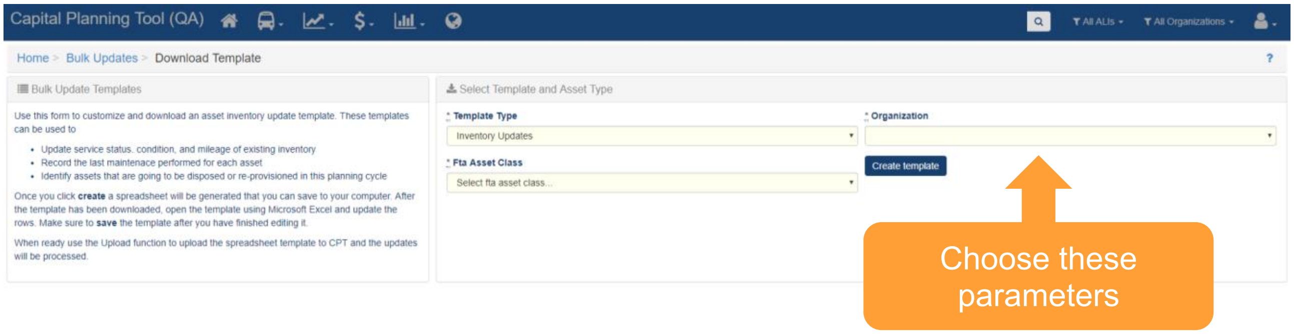
Selecting "Bulk Updates" allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

Figure 40 Bulk Update Tools



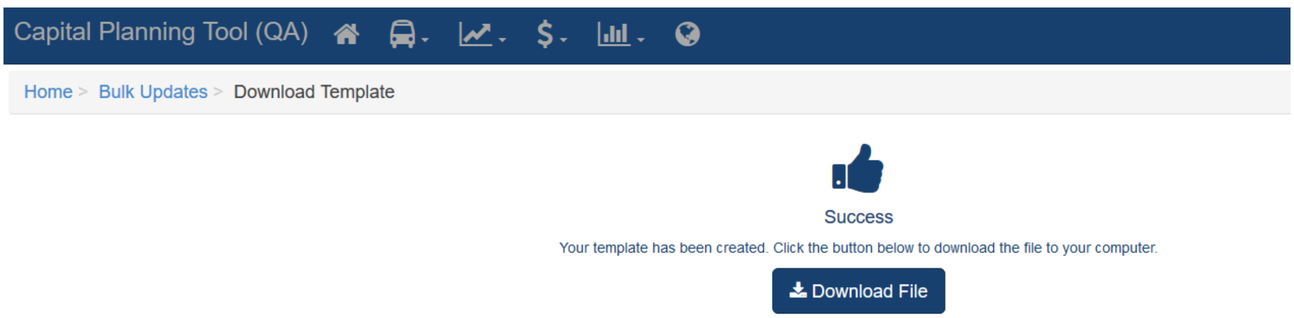
The first step to a bulk update is Creating a Template. Click "Create a new Template", then select your Template Type, Organization, and Asset Class, then select "Create Template."

Figure 41 Bulk Update Details



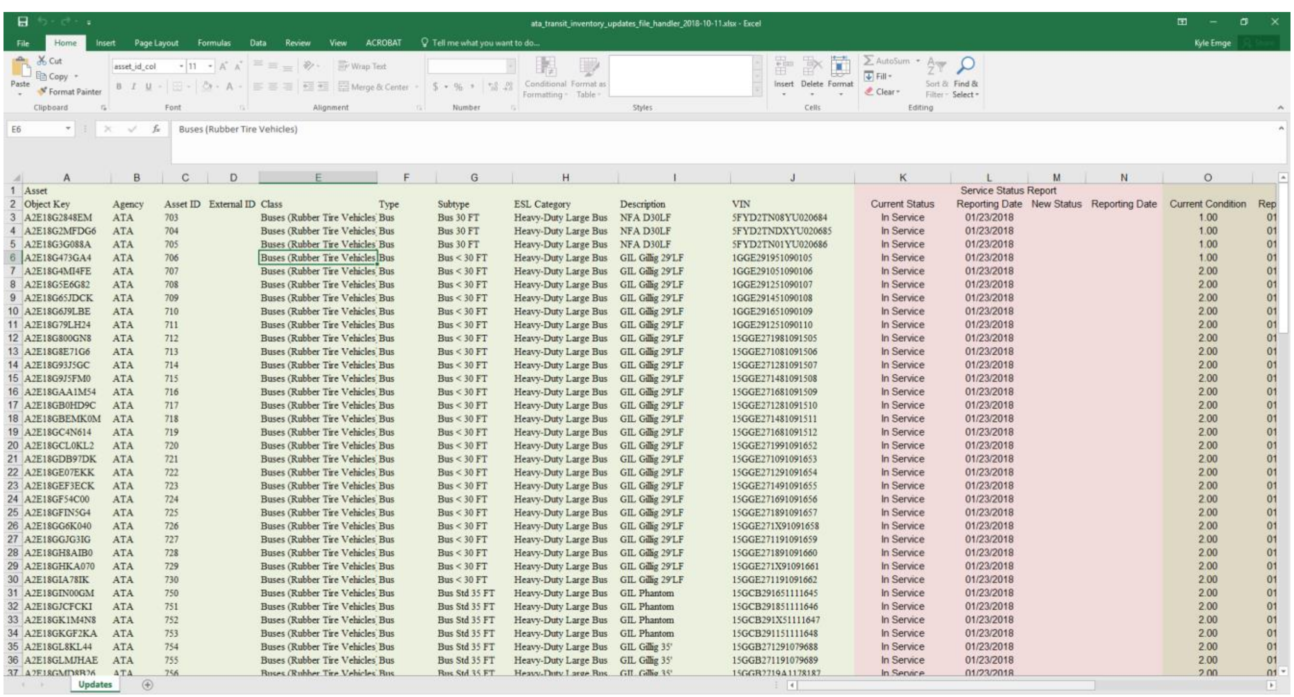
Select “Download File” and save the resulting spreadsheet on your computer.

Figure 42 Bulk Update Spreadsheet Download



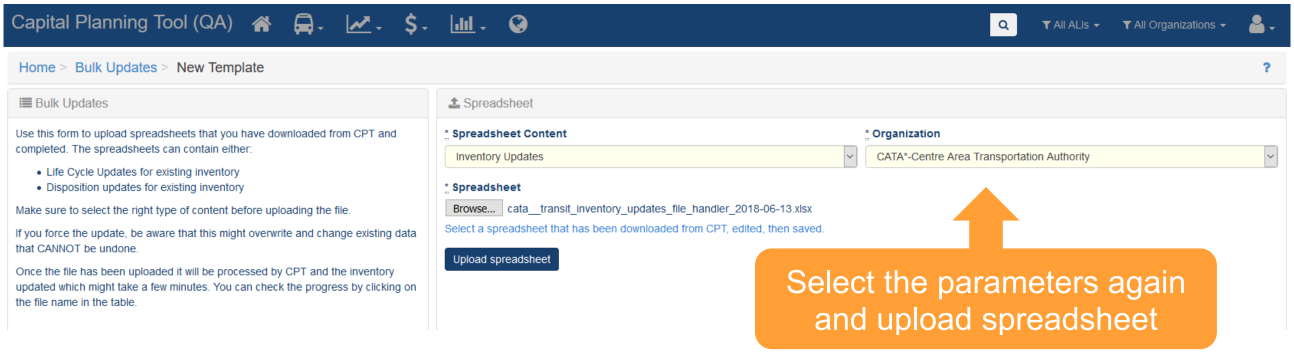
Edit the resulting spreadsheet and make sure you save your changes.

Figure 43 Bulk Update Spreadsheet



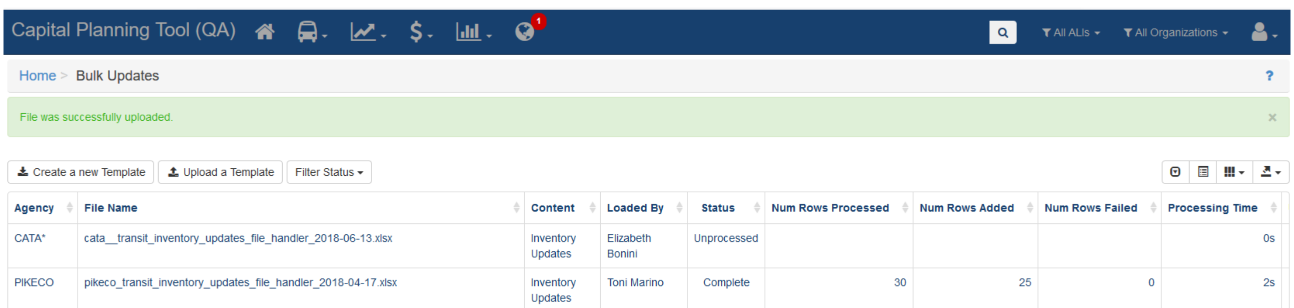
Head back to the Bulk Updates page and at the top select “Upload a Template.” Select the parameters on the right that were used to create the template and then click browse and find your edited spreadsheet. Then click Upload spreadsheet.

Figure 44 Bulk Update Upload



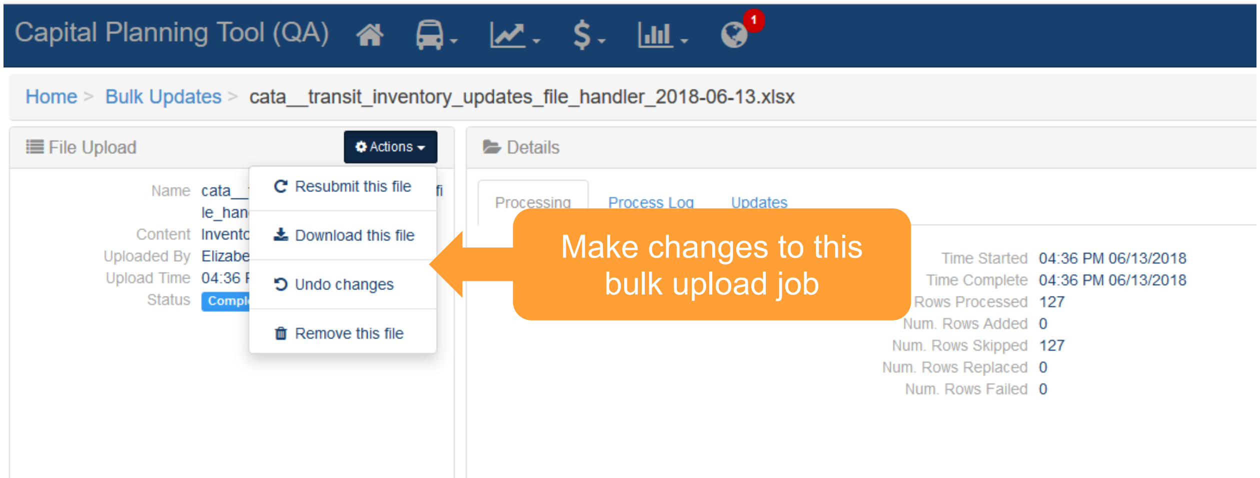
If your file uploads successfully, the main Bulk Update screen should reappear with a “File was successfully uploaded banner” and you should see the most recent update appear at the top of the bulk update history. The system will perform the updates and a new notification will appear in your notification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

Figure 45 Bulk Upload Processing



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.

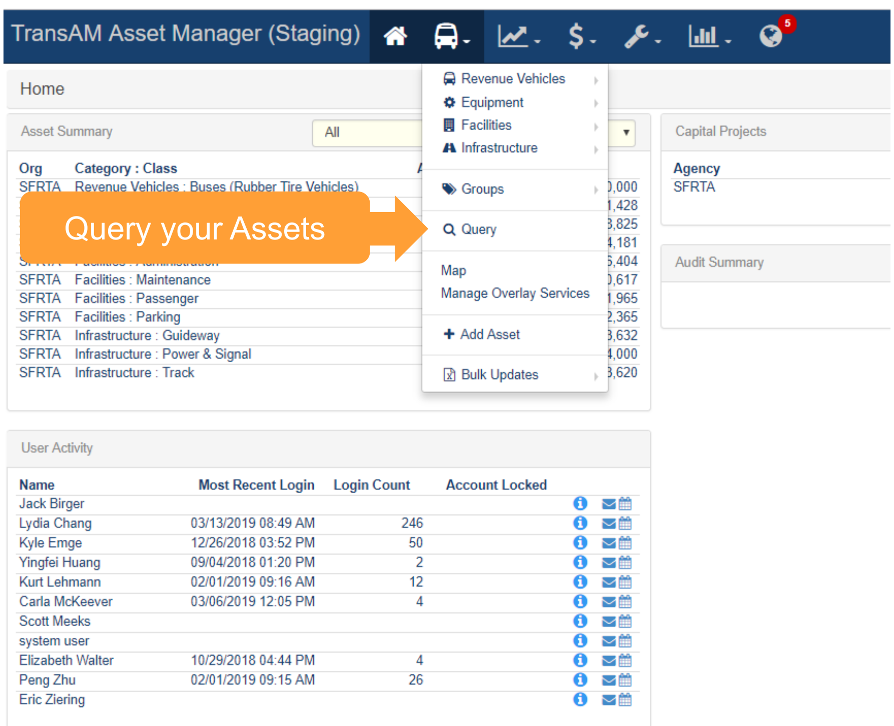
Figure 46 Bulk Update Edit



4.7 Query

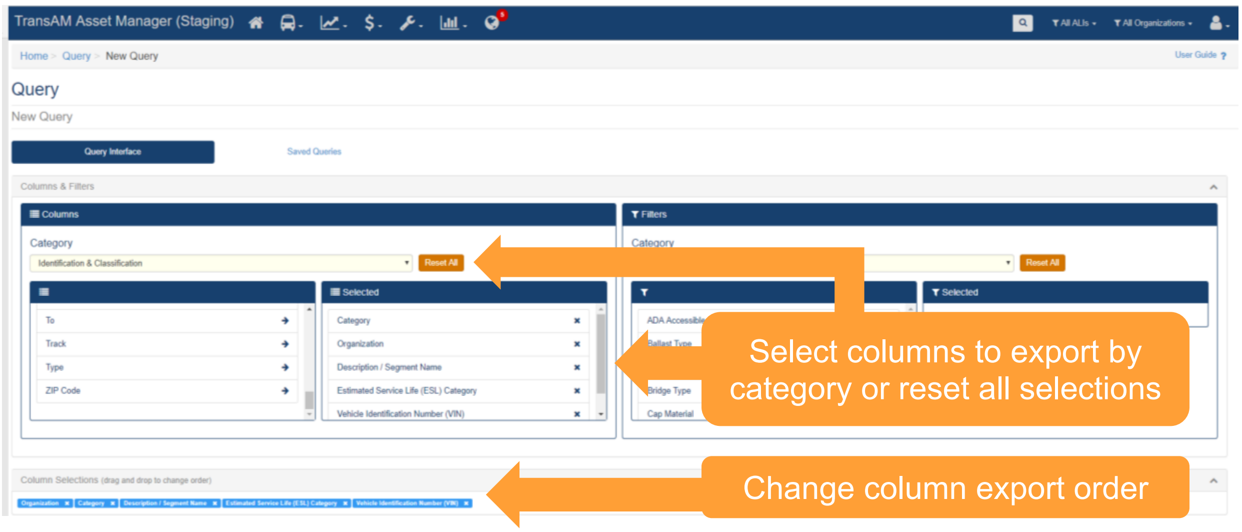
The system has the ability to query the database of all assets for those matching specific search criteria and provides the ability for users to build, save, and share custom data exports.

Figure 47 Asset Query



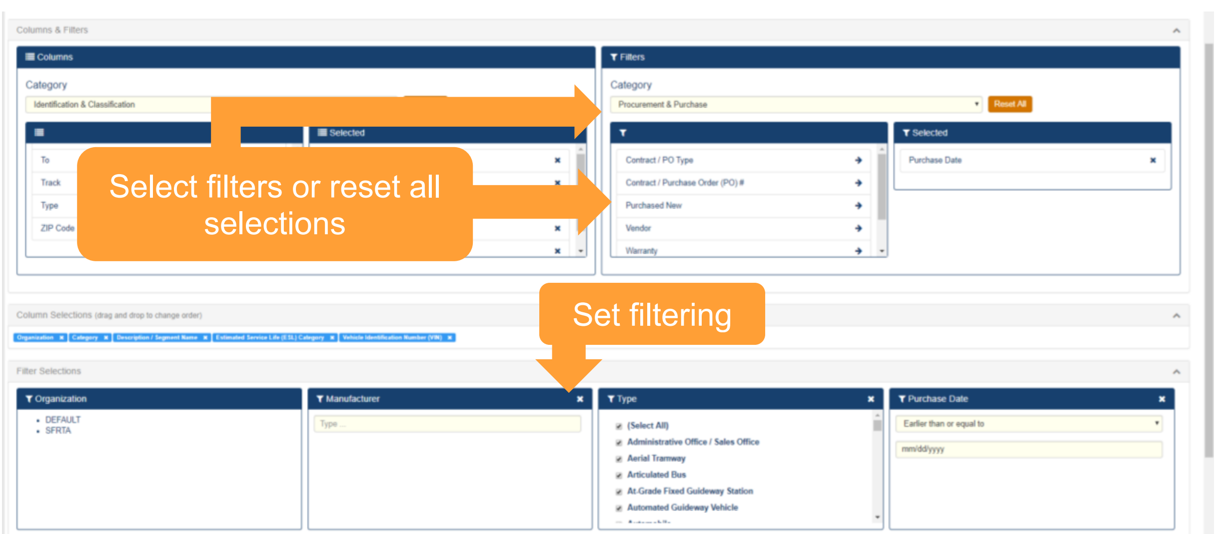
From the Query screen, users can select each data field you want to export from a variety of attributes within the Columns panel. All data fields belong to a specific category. Select a category to refresh the data fields available for selection. Users can select each individual column that you want 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



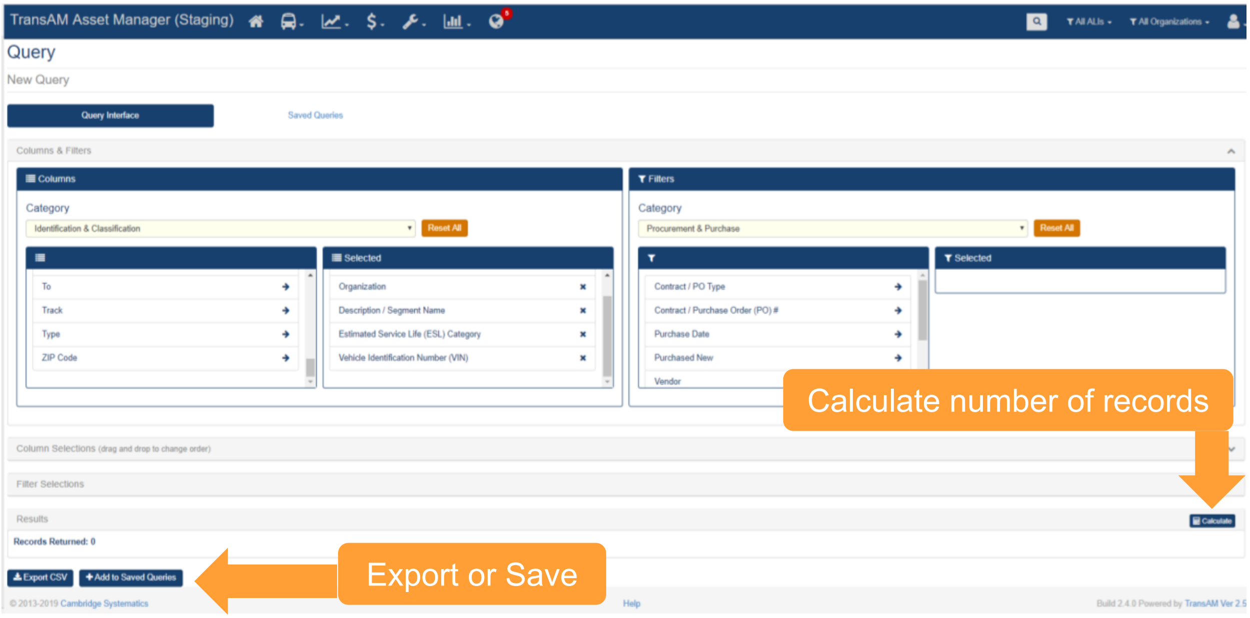
From the Query screen, you can also select what data to filter. Filtering functionality works in a similar manner as column selection. Select each individual data field that you want to filter, by moving fields to the Selected box by clicking on the arrow in each field and remove selected fields by clicking 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.

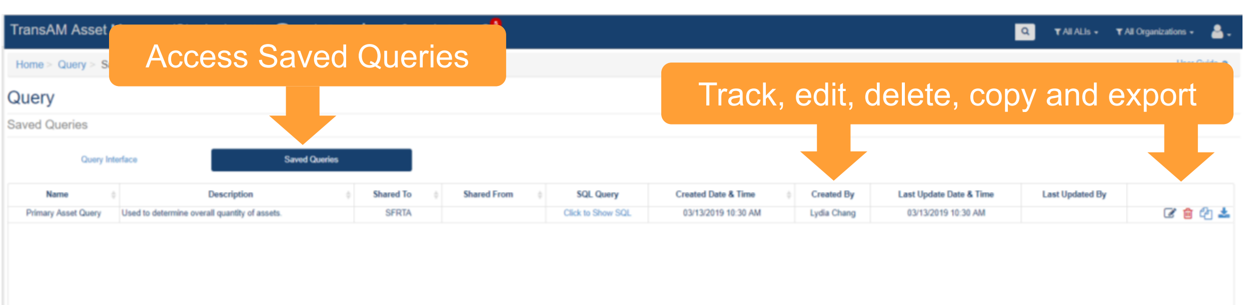
Figure 50 Calculate, Export or Save



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.

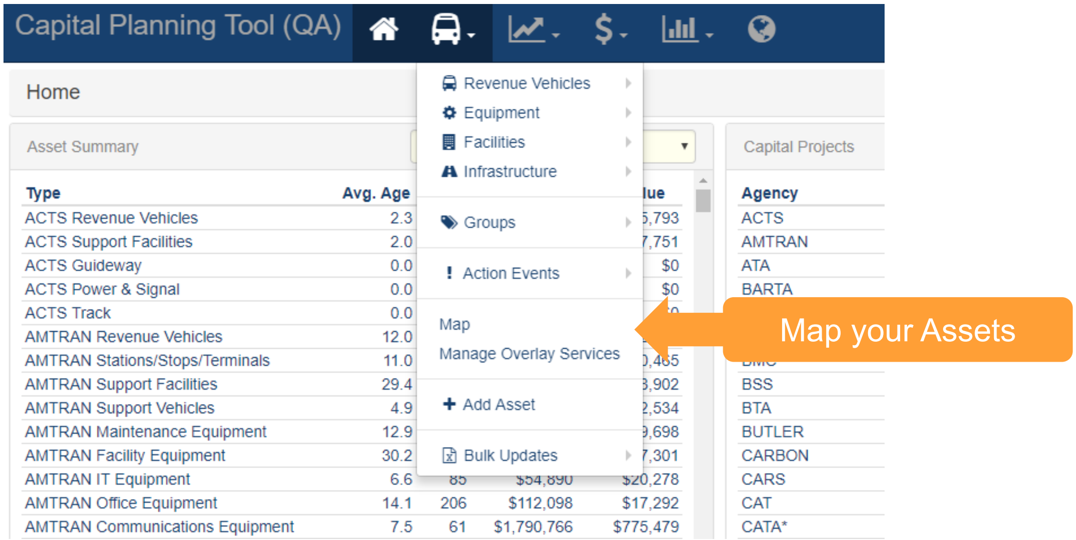
Figure 51 Saved Queries



4.8 Map

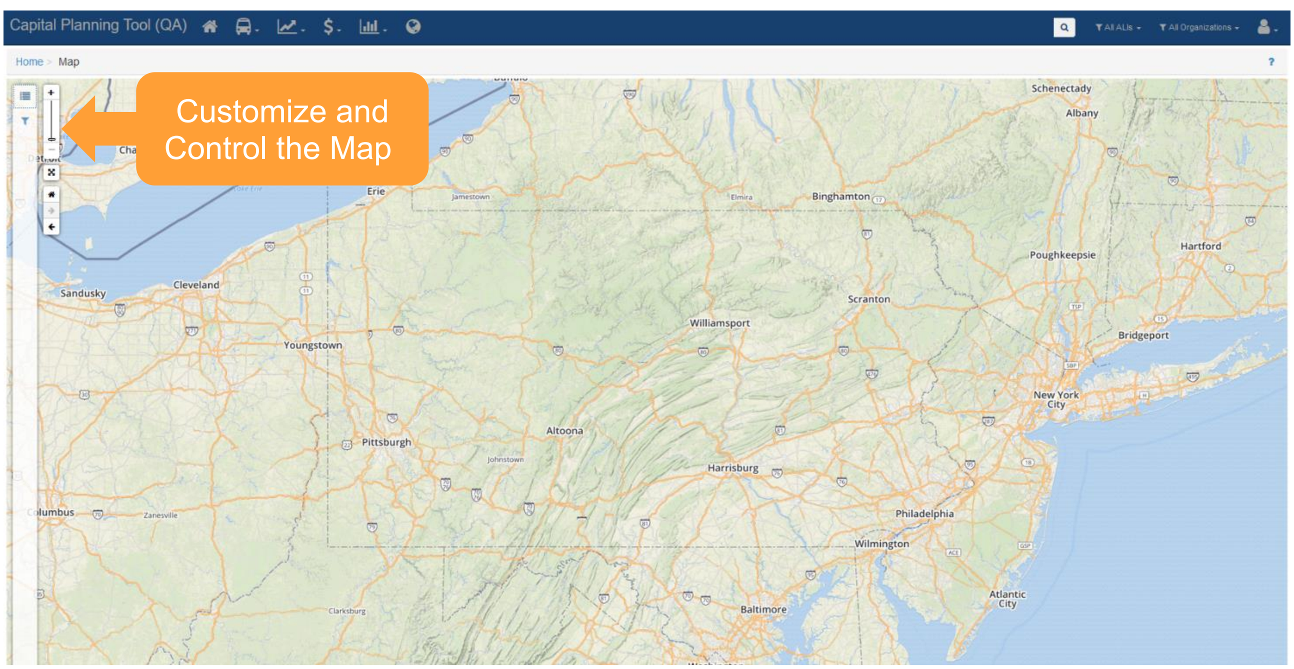
The system provides the ability to overlay asset locations on a map.

Figure 52 Asset Map



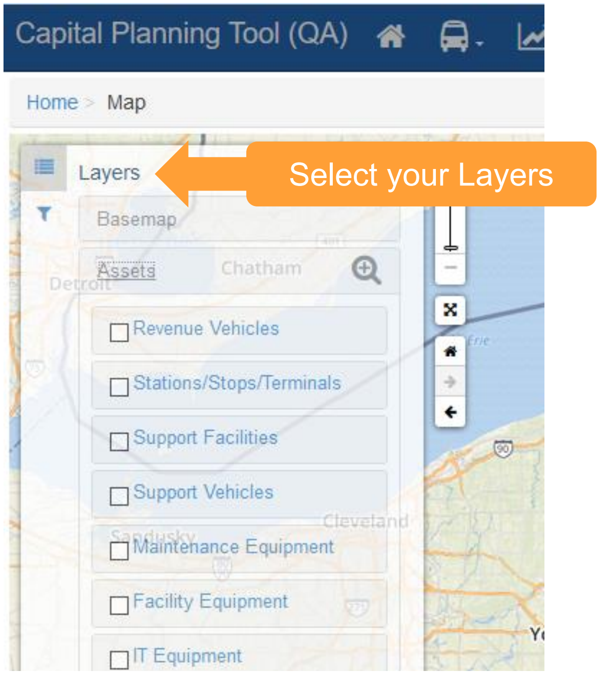
The map has several key features. You can customize the map from the two icons in the bar on the left of the map.

Figure 53 Map Customization



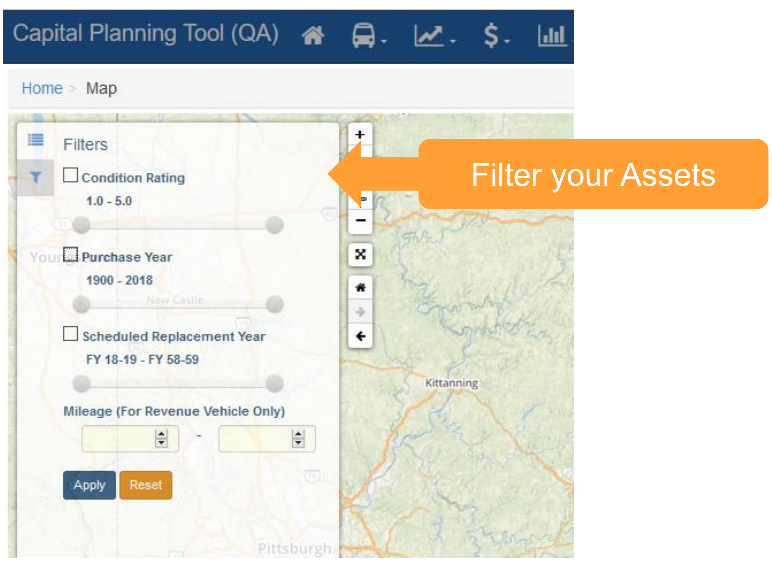
Clicking the top icon allows you to select which layers to display on the map. You can select a default map, the Esri streets map, the Esri Satellite map, or the Esri topographic map as your basemap. Clicking assets will allow you to specify which asset types you wish to display on the map.

Figure 54 Map Layers



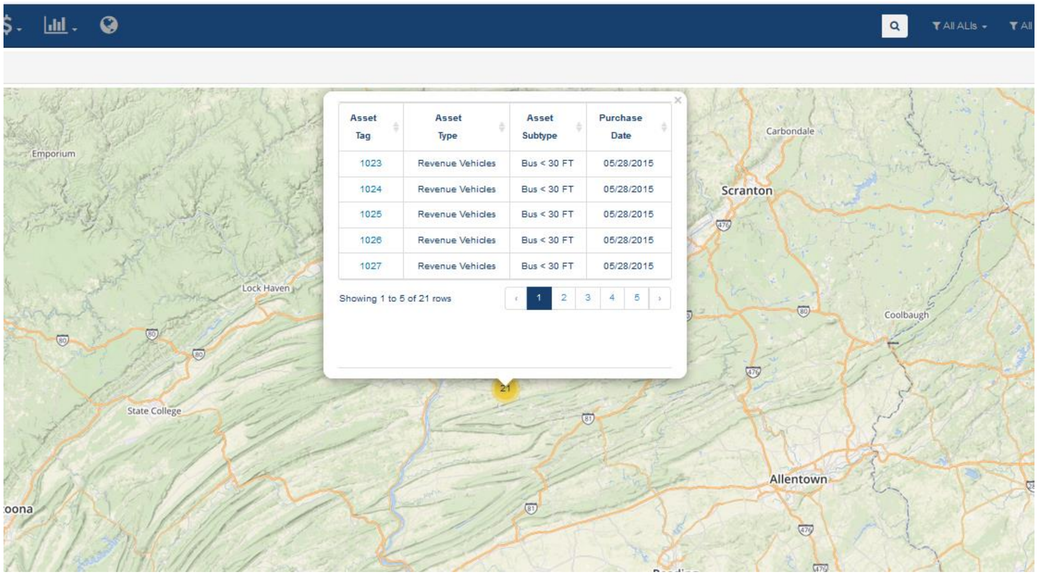
Clicking the filter icon will allow you to pare down the assets that are displayed on the map.

Figure 55 Map Filter



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

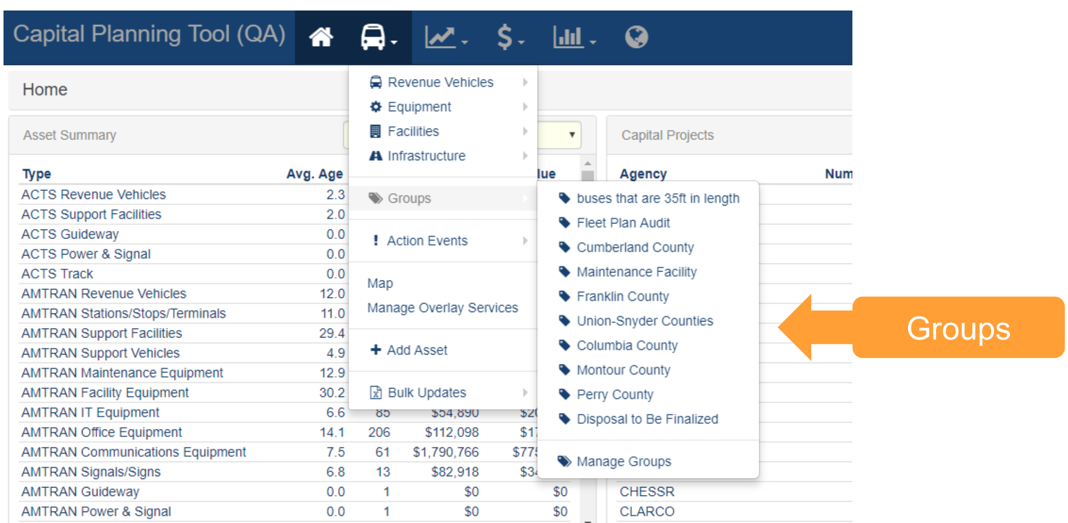
Figure 56 Map Asset Details



4.9 Groups

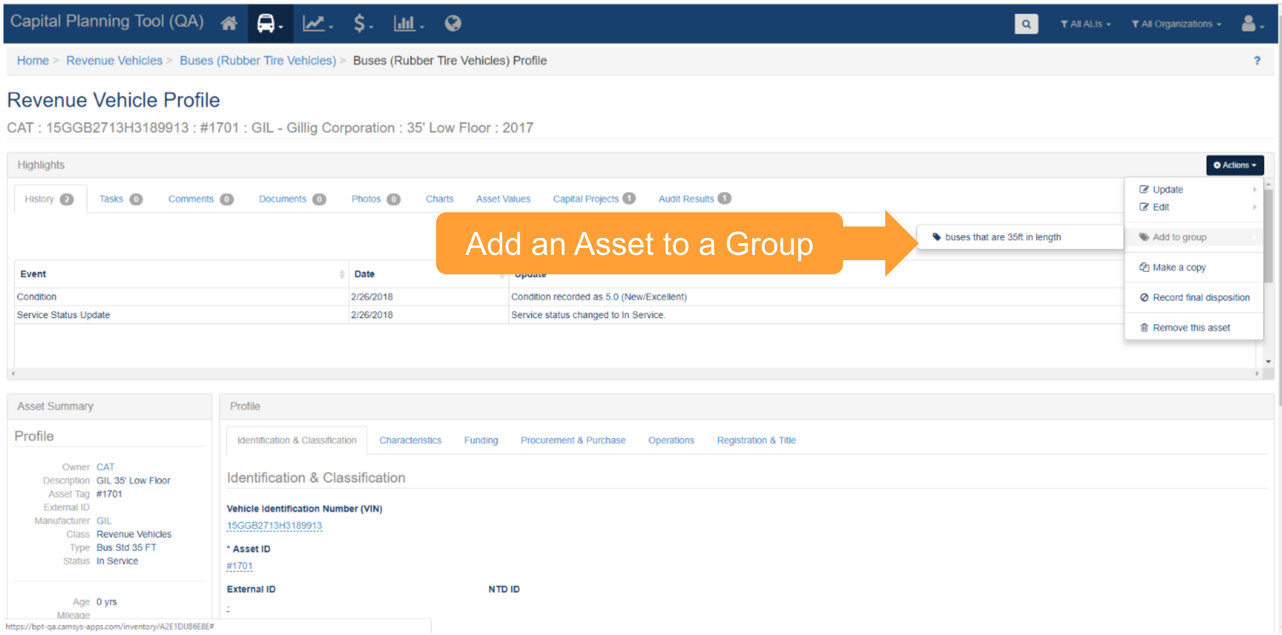
Agencies can create an on-the-fly collection of assets called groups so that they can quickly recall commonly viewed assets all at once. They can be accessed from the Asset Inventory Menu.

Figure 57 Asset Groups



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

Figure 58 Adding an Asset to a Group



5.0 Maintenance

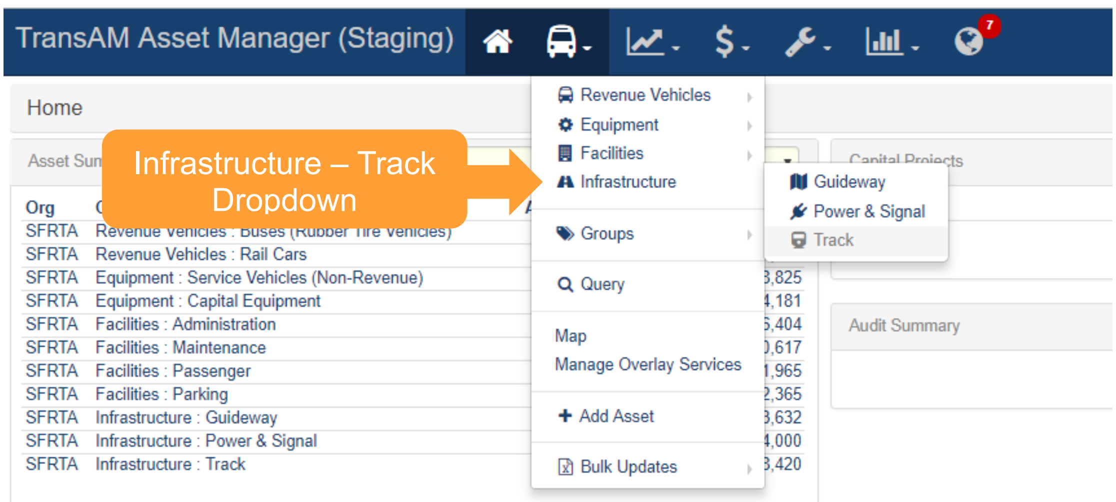
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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.

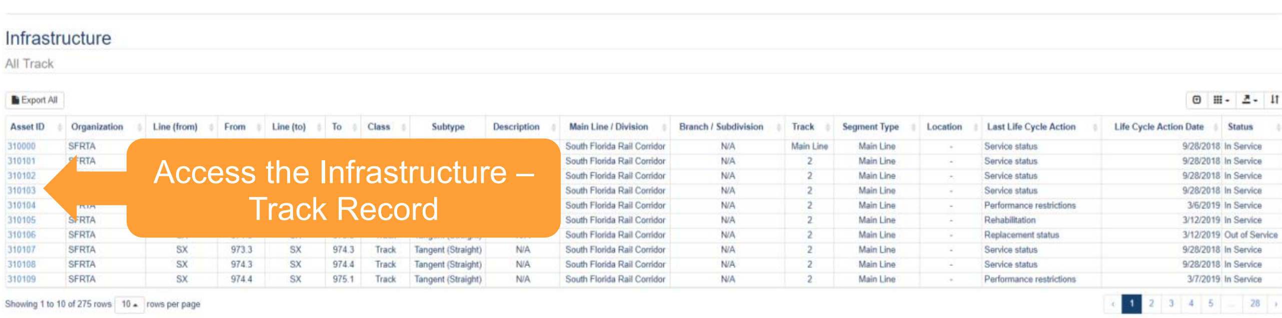
Performance Restrictions can be reported within an individual Infrastructure – Track asset profile, which can be accessed from the Asset Inventory dropdown

Figure 59 Asset Inventory Dropdown : Infrastructure - Track



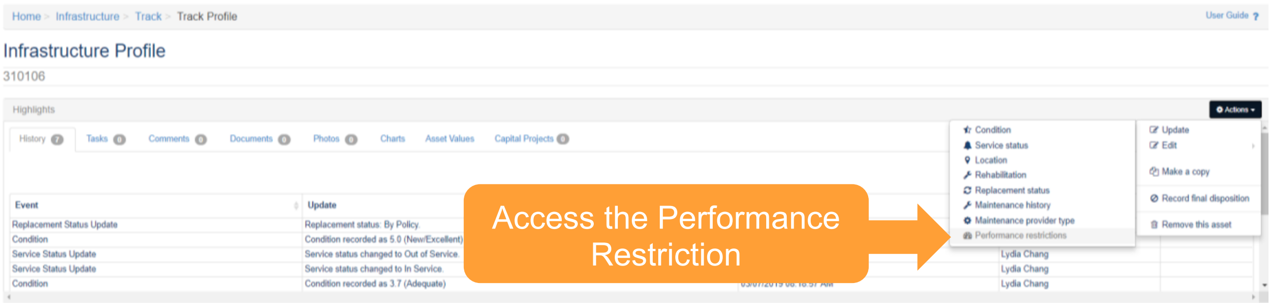
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 60 Existing Asset Interface : Infrastructure - Track



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

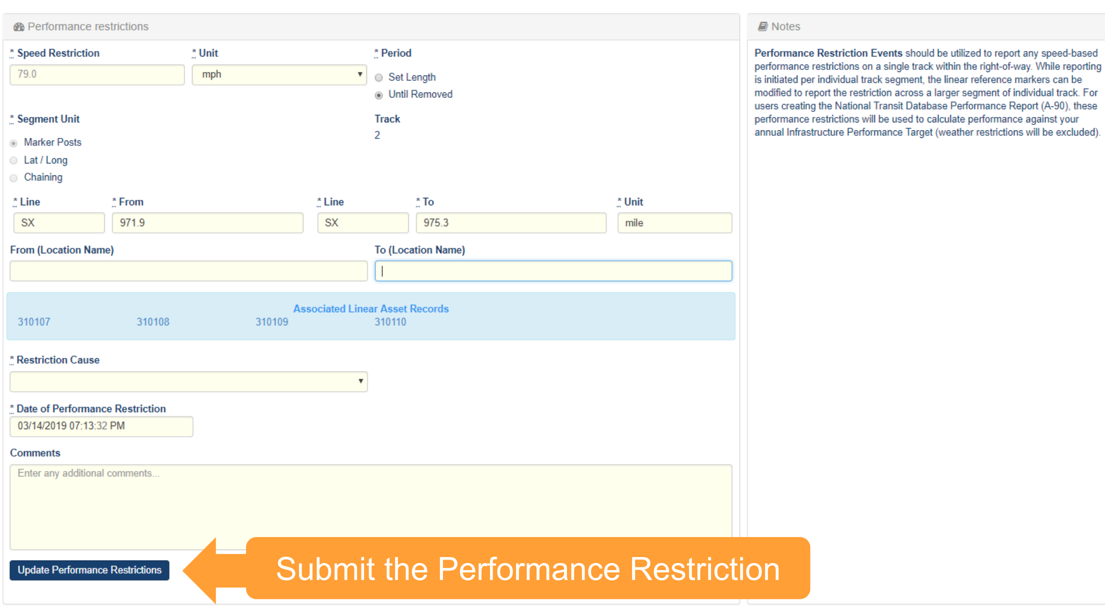
Figure 61 Lifecycle Action Menu



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.

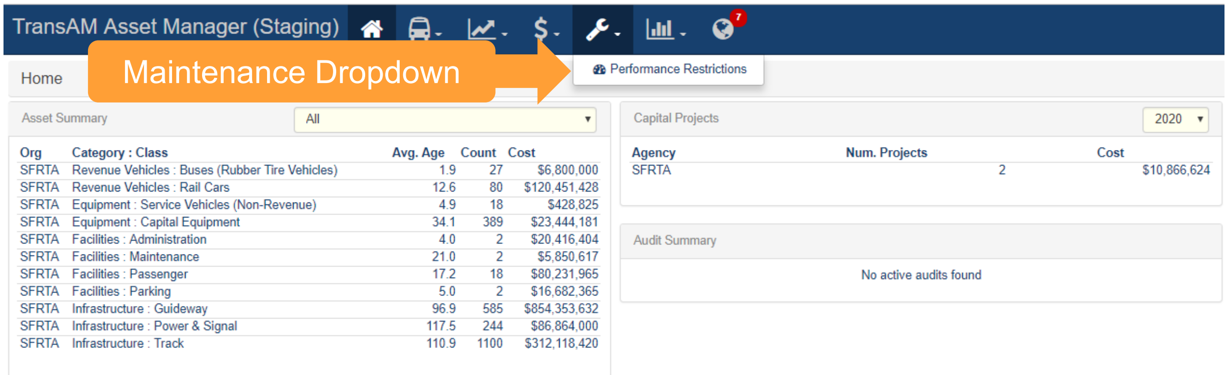
Users can also adjust the linear “From” and “To” marker post values (which were auto-populated from the track record), in order to modify the length of the restriction segment. Modifying the restriction length means the track restriction can be reported for more than one segment of track, even though 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



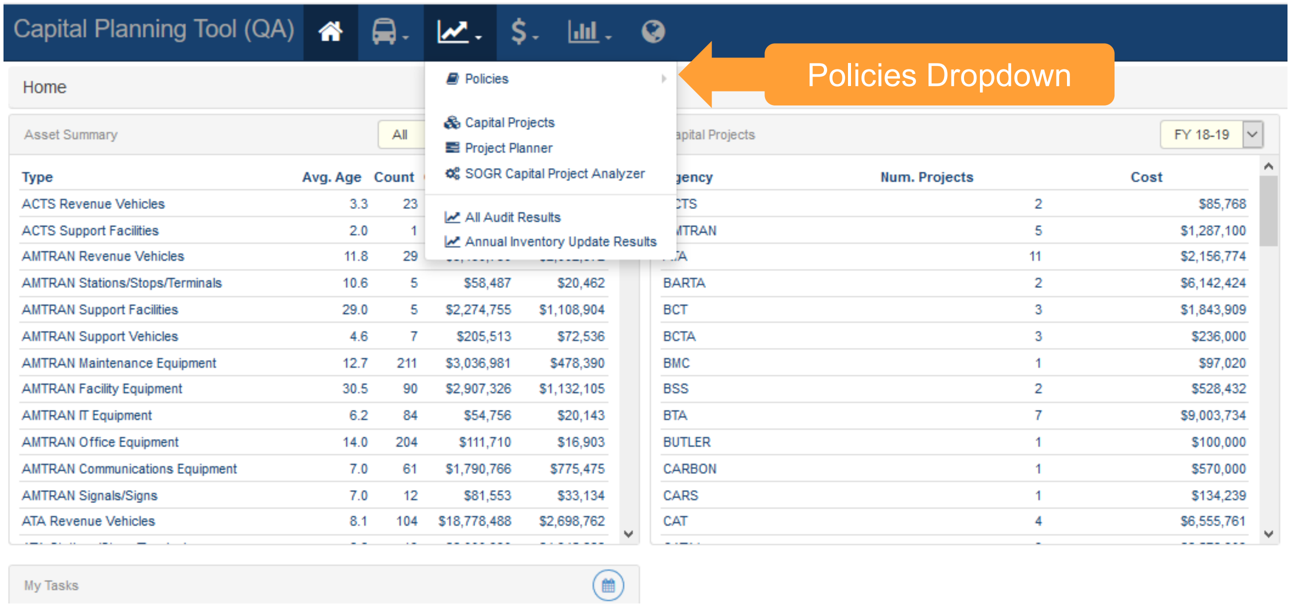
All restrictions in an “Active” status appear by default in the management section. Events can be filtered to “All” or “Expired” to view historical restrictions, by status. Filtering can also be achieved by searching for events that were active within a specified period of time. If a restriction is no 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

6.0 Policies

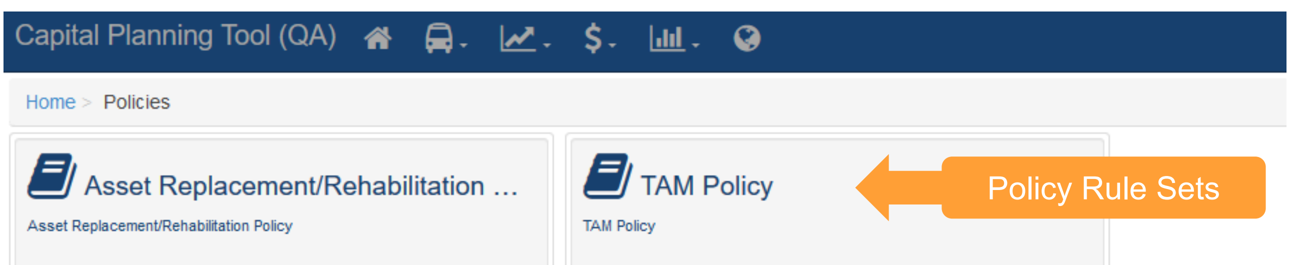
A Policy is a set of parameters that establishes rules related to assets saved within the system. While an organization can create and modify multiple policies, each organization can only have one current policy at a time. The policy is applied to an organization's inventory on an asset by asset basis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

Figure 65 Policies Dropdown



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.

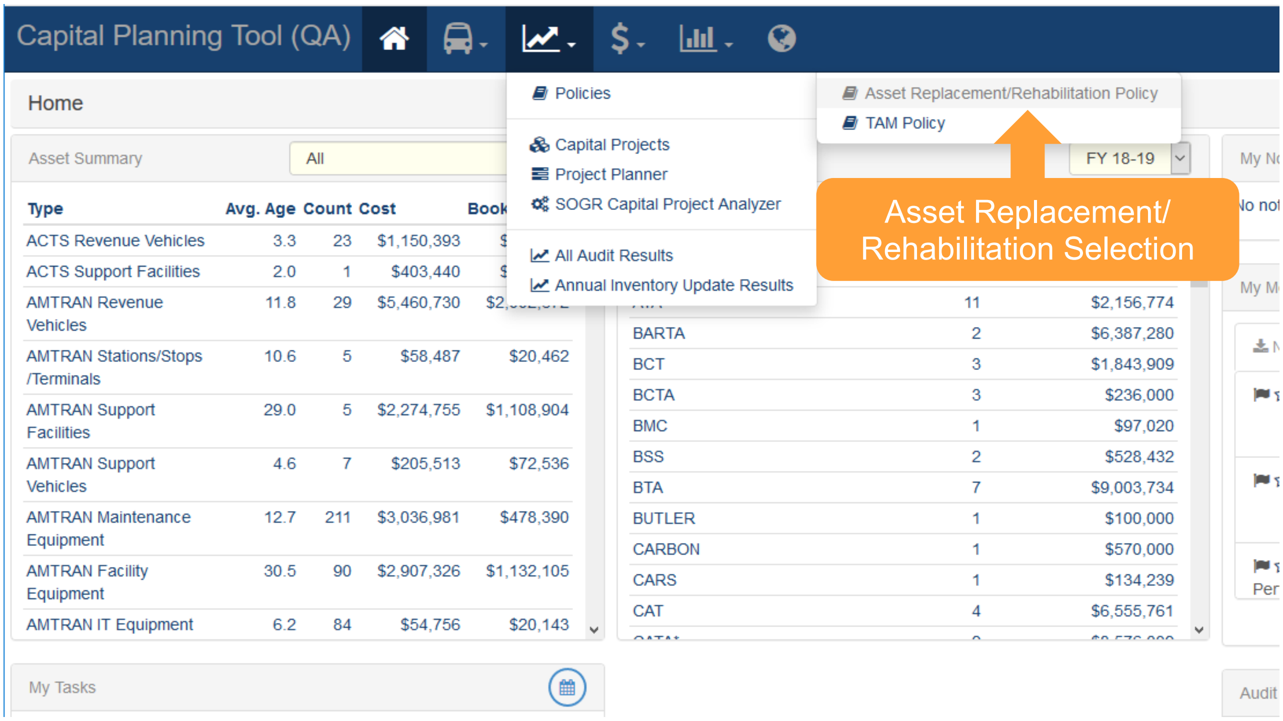
Figure 66 Policy Rule Sets



6.1 Asset Replacement/Rehabilitation Policy

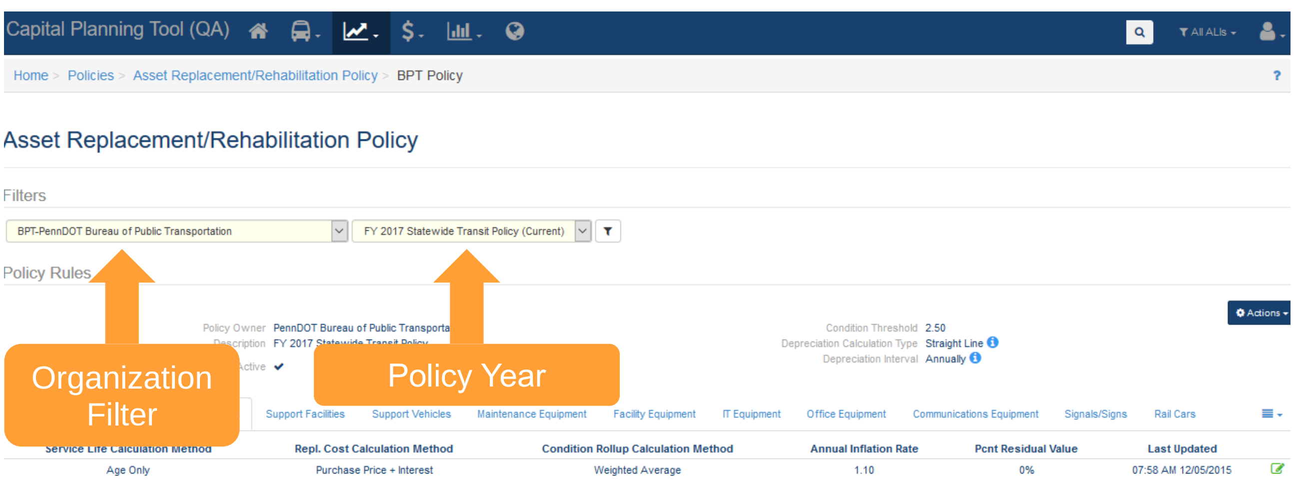
Asset Replacement and Rehabilitation Polices can be chosen under the Policies submenu. The SOGR Capital Project Analyzer, Capital Projects, and Project Planner tools apply this policy to determine the estimated service life, replacement cost, and depreciation of an asset. Asset Replacement/Rehabilitation 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



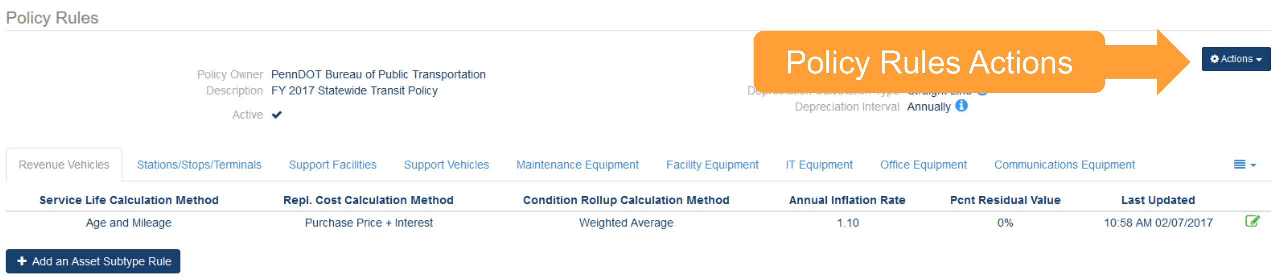
Use the organization filter dropdown to choose the correct organization. You will then need to select the policy year that you wish to work with. Pressing the Filter Button will display the policy rules for the organization and policy year that you have chosen.

Figure 68 Asset Replacement/Rehabilitation Policy Filters



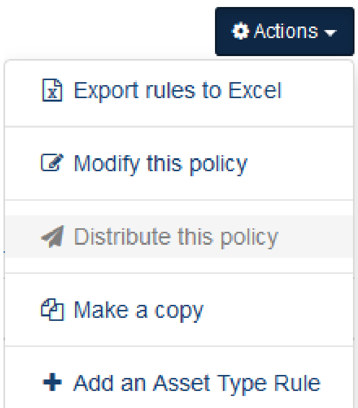
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 69 Policy Rules



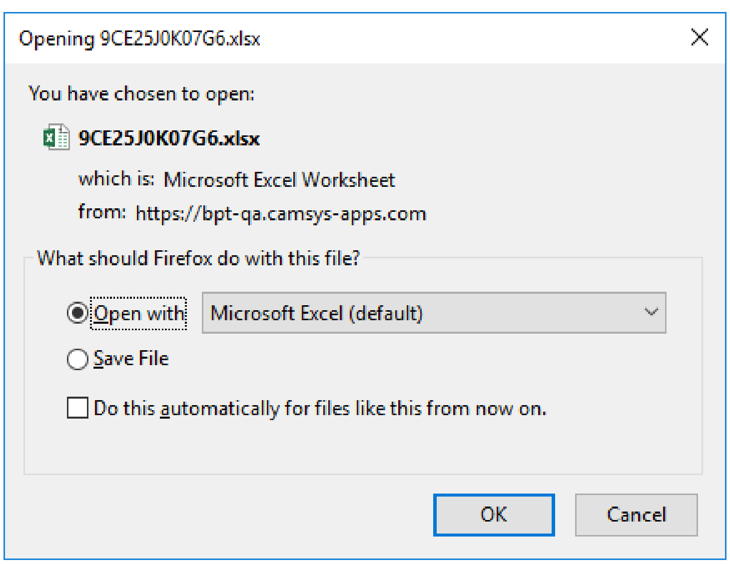
The Actions button will display a list of options as shown.

Figure 70 Policy Rules Actions Dropdown



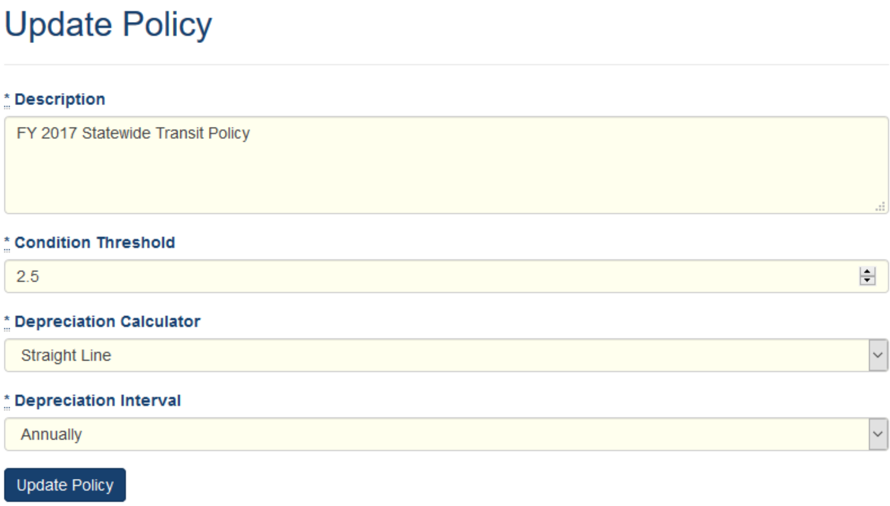
Export rules to Excel opens a dialog box to save the Policy Rule as an Excel spreadsheet file.

Figure 71 Export rules to Excel (Windows dialog box)



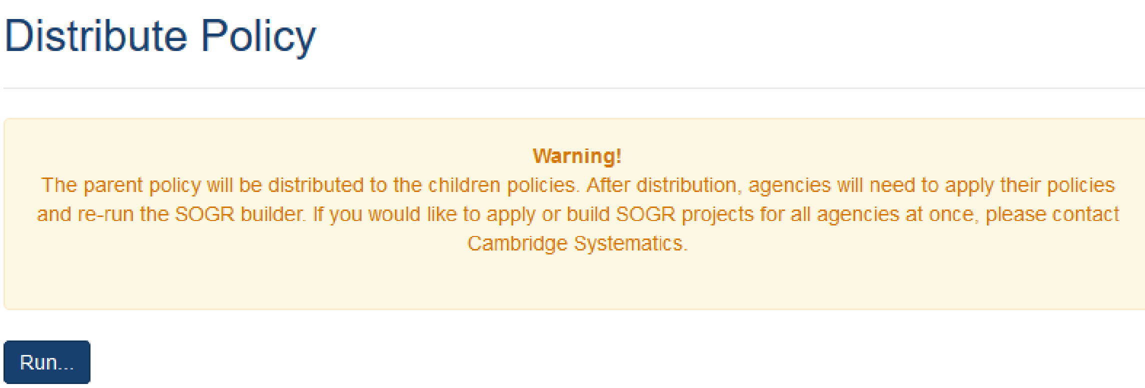
Modify this Policy will open a dialog box that displays the editable fields at the organization level. When you are done making edits, click "Update Policy" button to apply changes.

Figure 72 Modify (Update) Organization Policy Dialog



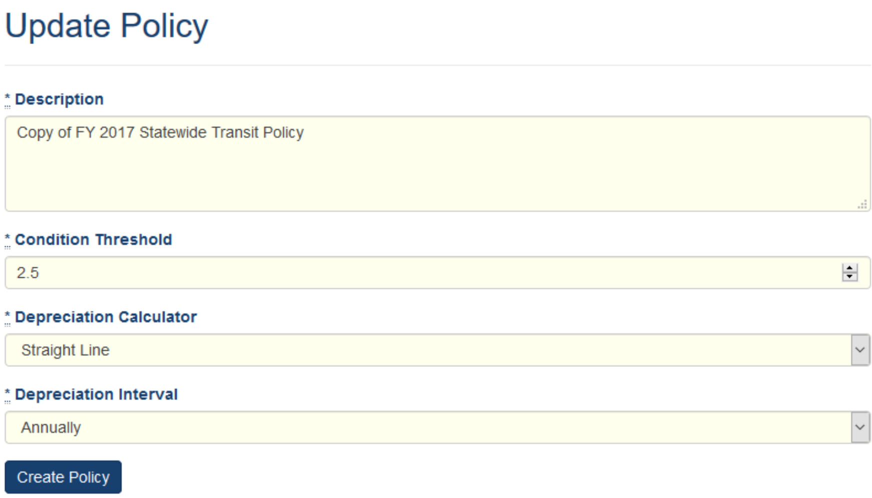
If you are content with a parent policy and wish to distribute the policy rules through to one or more child organizations, select “Distribute this Policy.” A warning will display, as shown, to inform you that child organizations will need to choose whether to apply this policy.

Figure 73 Distribute Policy



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.

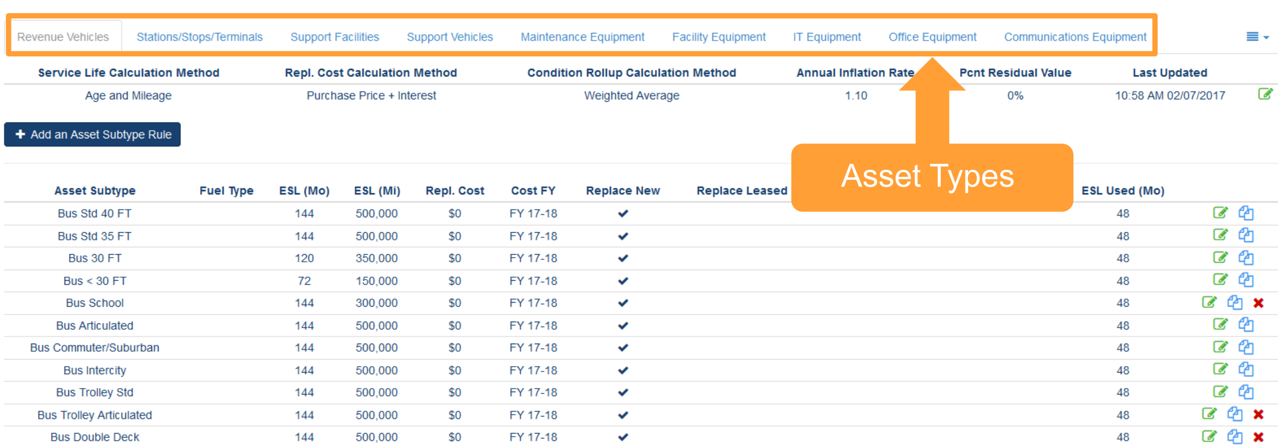
Figure 74 Copy Organization Policy Dialog



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

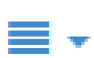


Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pcnt Residual Value	Last Updated
Age and Mileage	Purchase Price + Interest	Weighted Average	1.10	0%	10:58 AM 02/07/2017

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

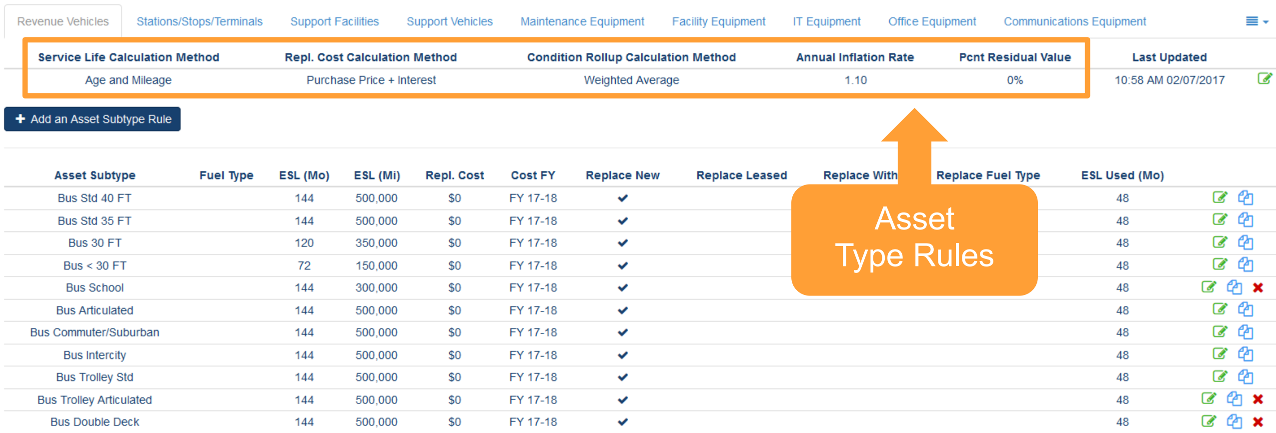
If there are too many asset types to fit in the tabs, you will see the dropdown icon, as depicted below.

Figure 76 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 77 Asset Type Rules

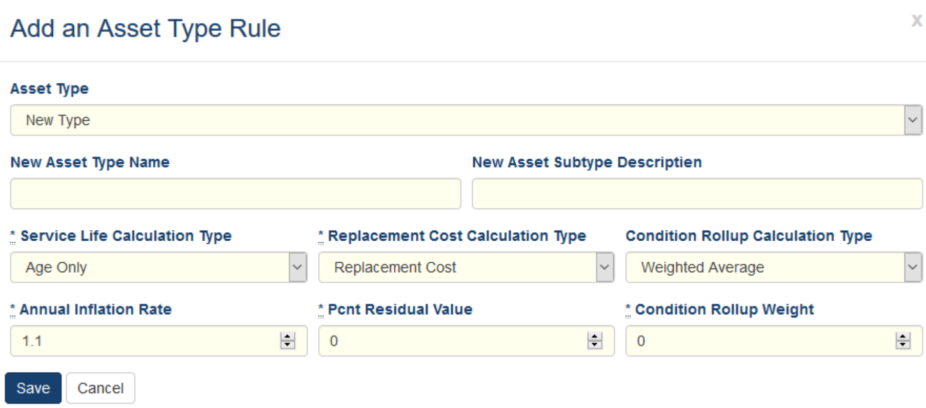


Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pcnt Residual Value	Last Updated
Age and Mileage	Purchase Price + Interest	Weighted Average	1.10	0%	10:58 AM 02/07/2017

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

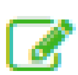
You can add an Asset Type Rule by selecting the option in the Actions dropdown. Selecting that option will display the following dialog box.

Figure 78 Add an Asset Type Rule Dialog Box



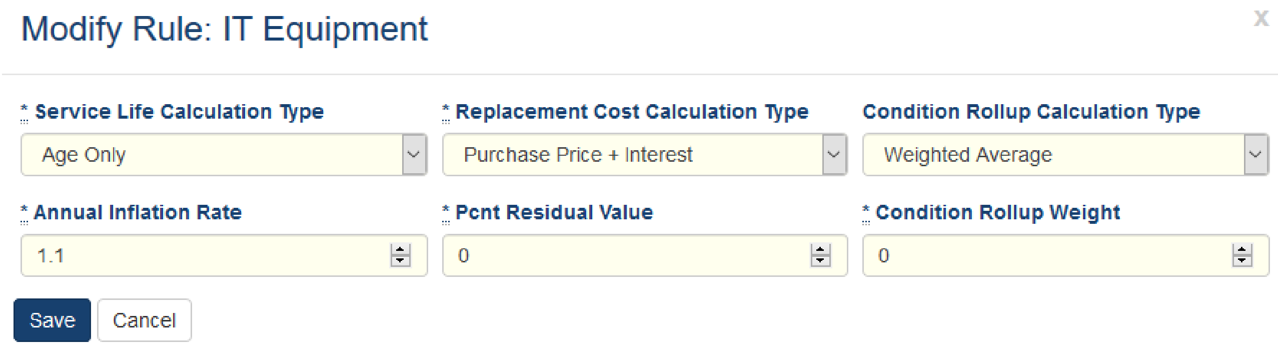
You can edit the Asset Type Rule for a specific asset, by clicking on the edit icon as depicted below.

Figure 79 Edit Icon



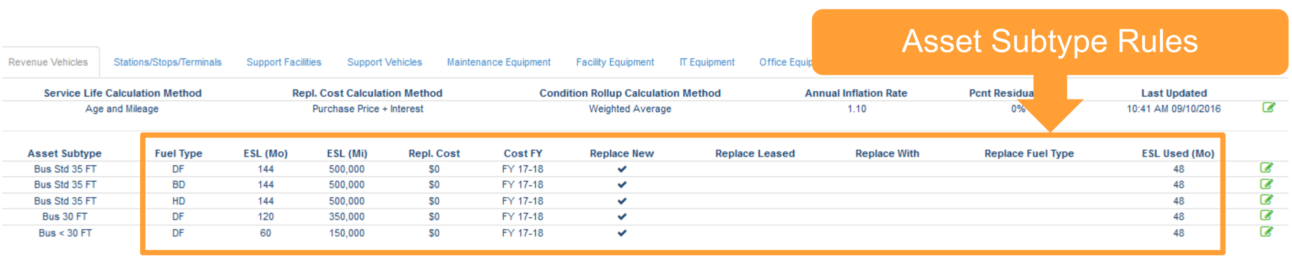
Clicking edit on an “Asset Type Rule” will display a dialog box, allowing you to modify the Asset Policy Rule.

Figure 80 Modify Asset Policy Rule



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

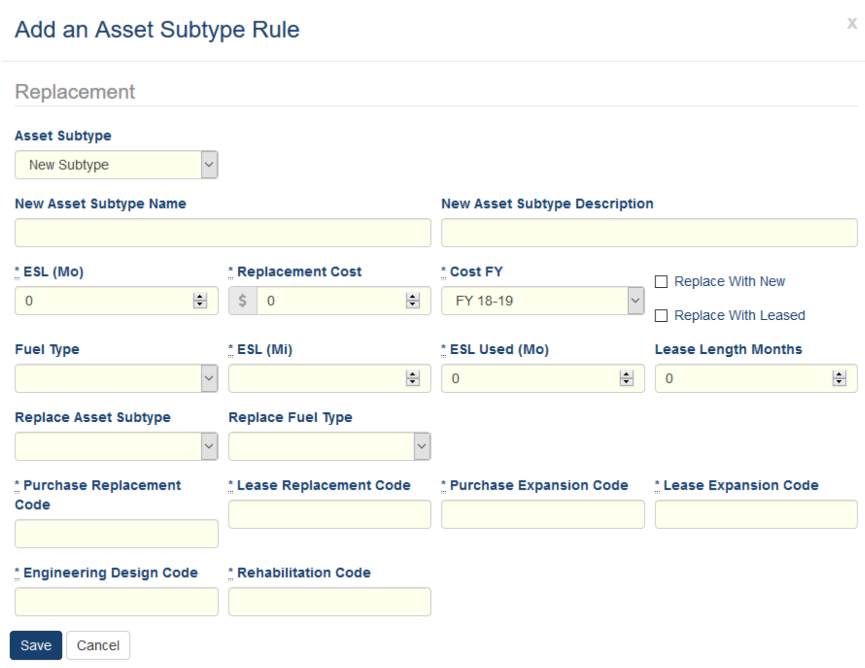


If you click the add an “Asset Subtype Rule” button, you will be able to create a new entry.

Figure 82 Add an Asset Subtype Rule Icon

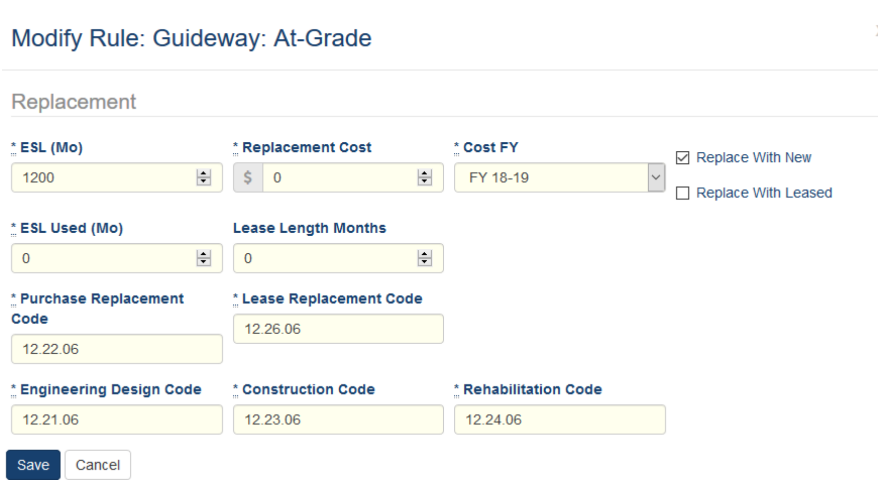
Select or fill out each text box in the Add an Asset Subtype dialog box to create a new rule. Click the “Save” button when you are satisfied with your entries.

Figure 83 Add an Asset Subtype Rule Dialog



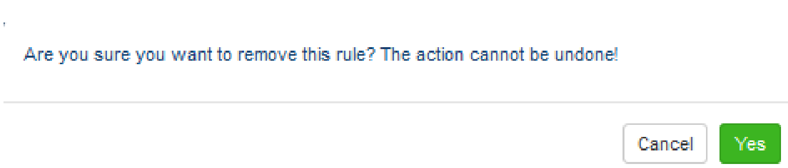
Clicking the Edit icon will bring up a dialog box to modify an Asset Subtype Rule.

Figure 84 Modify Asset Subtype Rule



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!

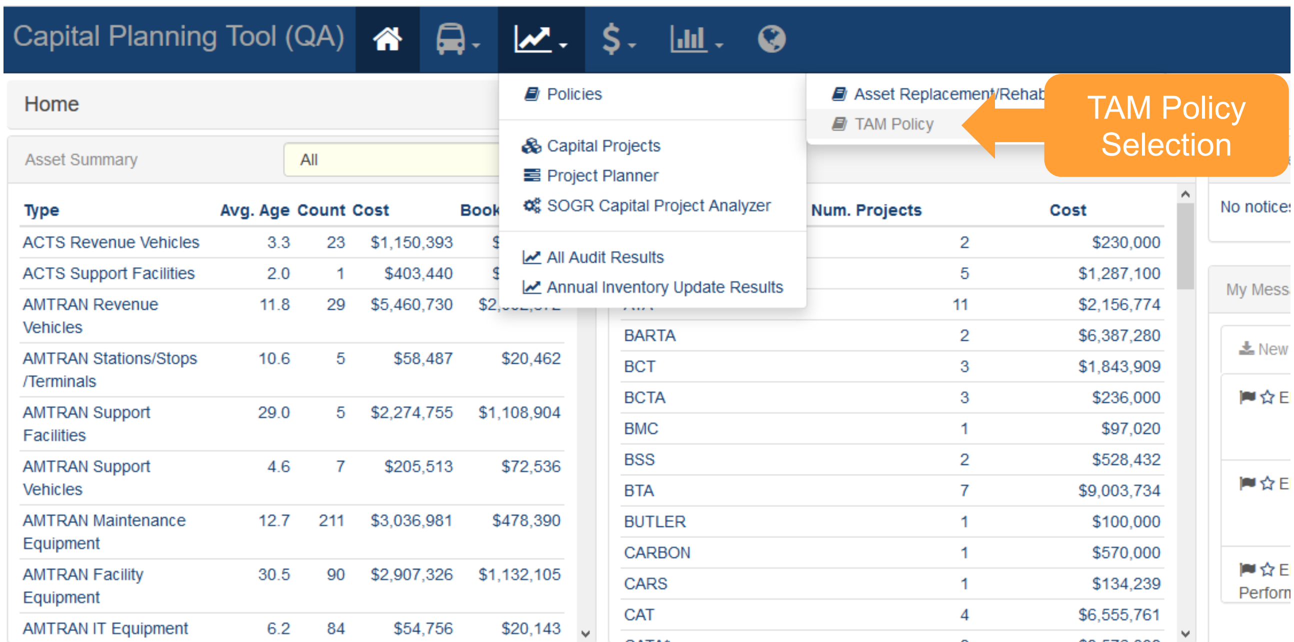
Figure 85 Remove Asset Subtype Rule



6.2 TAM Policy

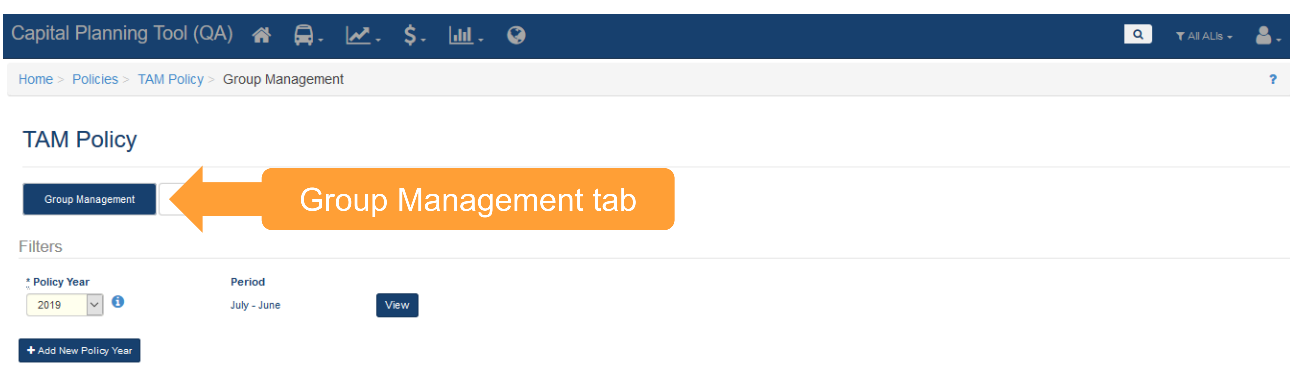
TAM Policies are used to set Useful Life Benchmark (ULB), Transit Economic Requirements Model (TERM), and Performance Measure Percent targets for asset categories on an annual basis. The TAM Policy will be used to conduct performance calculations for the NTD A-90 report. Ideally, TAM Policies should 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



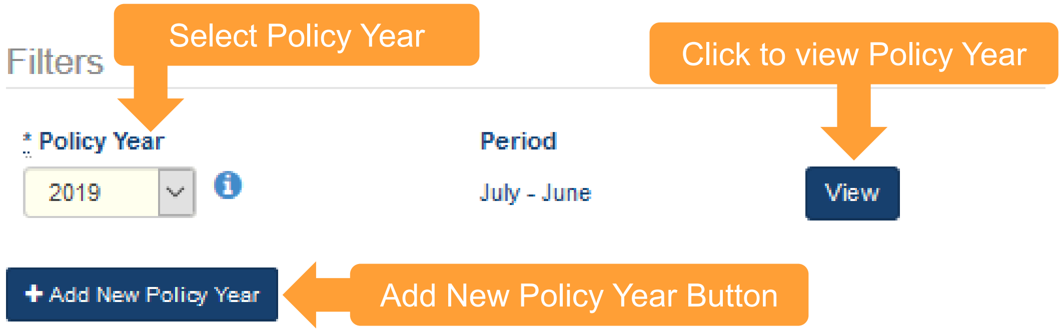
The first step in the creation of a TAM Policy, is to Add a New Policy Year, followed by creating groups. These initial steps can only be completed on the Group Management tab, which is only accessible by users with the TAM Group Manager or Admin permission.

Figure 87 TAM Policy Group Management



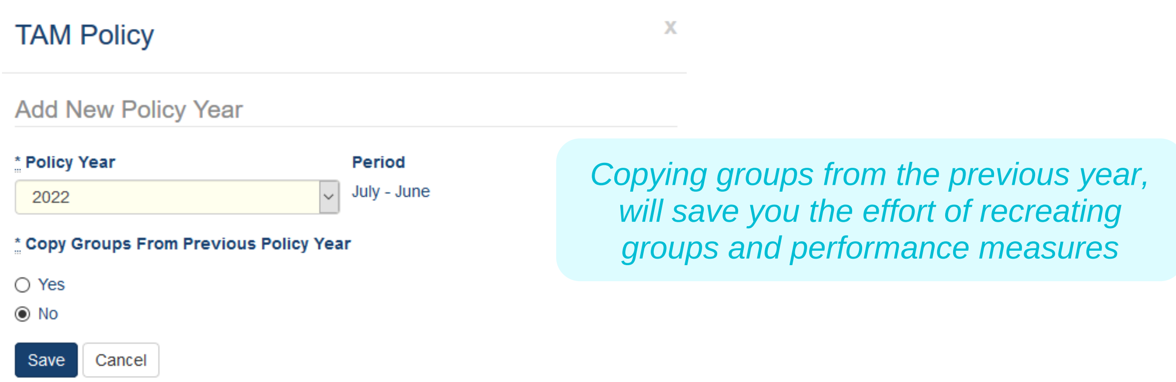
Select a Policy Year that you wish to view and click the “View” button. If a Policy Year does not exist or you need to create a policy for a new year, click the “Add New Policy Year” button and select the TAM Policy year you wish to create. The Period will populate based on individual client reporting 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



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.

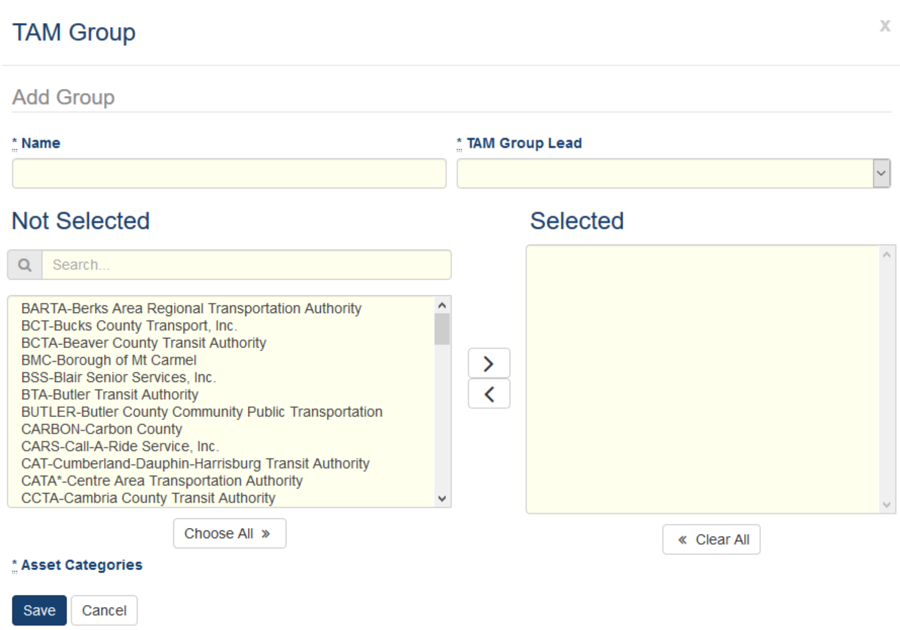
Figure 90 Group Management Period and Year

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

Figure 91 Add Group Button

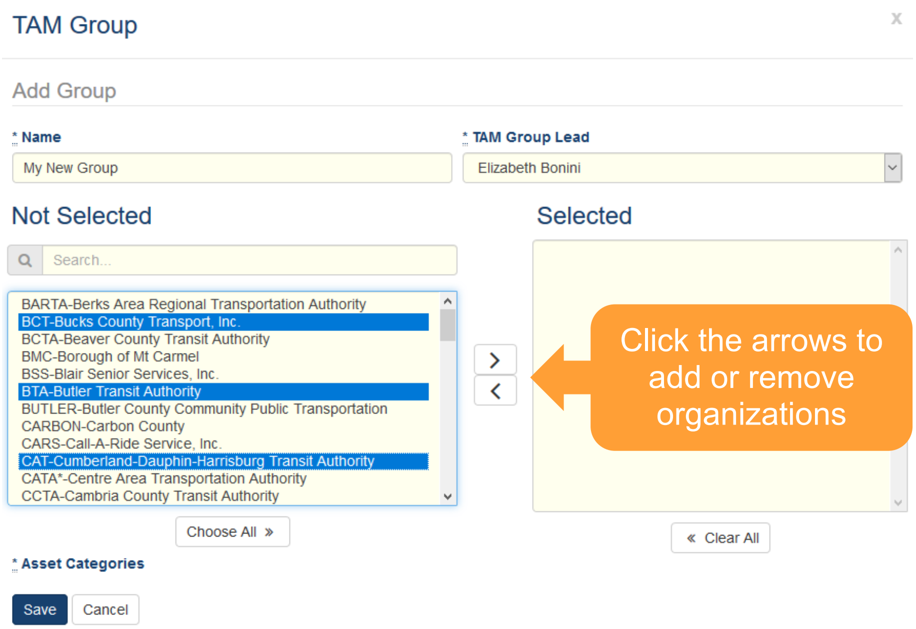
In order to create a new TAM Policy Group, you will name the group in Name and select the user that will be the TAM Group Lead. Next, select the applicable organizations to associate with the new TAM Group.

Figure 92 Add TAM Group Dialog



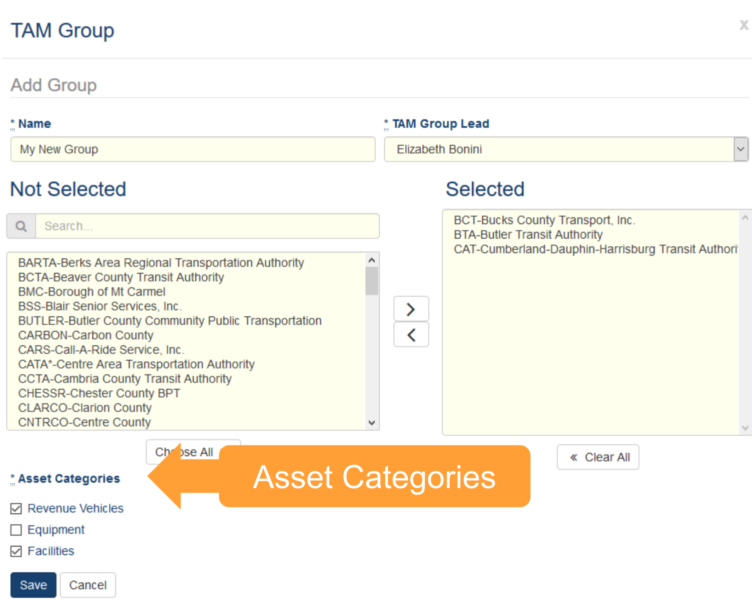
One you have made the proper selections, you will need to move the selected organizations to Selected by clicking on the arrows.

Figure 93 Add TAM Group Dialog
With Selections



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

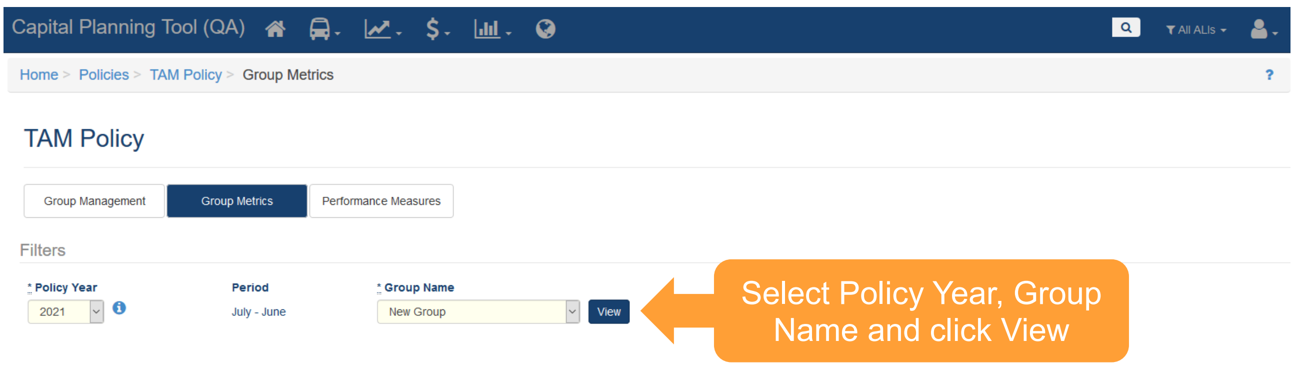


Once the new group is created, the Status is set to Inactive. You have the option to edit, delete or Generate that Group. Click “Generate” when you are ready to proceed and you will notice that the group Status will change to In Development. Clicking the “Generate” button adds the group to the Group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

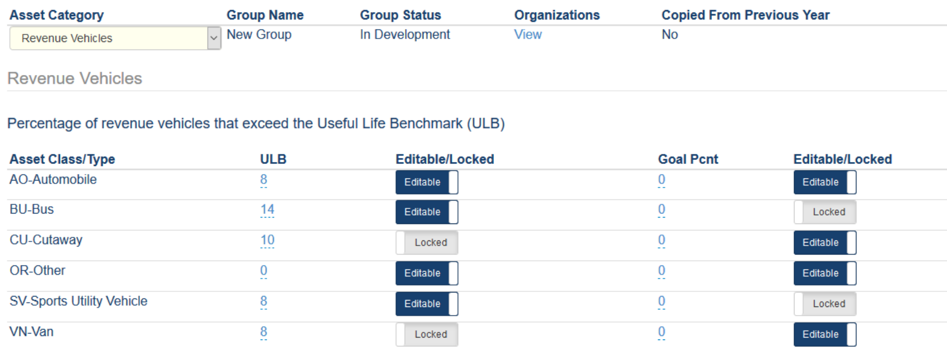
Newly created and previously existing TAM Groups will appear in the Group Metrics tab of TAM Policy. Select the Policy Year and Group Name you wish to work with from the selection menu and click the “View” button.

Figure 96 TAM Policy Group Metrics



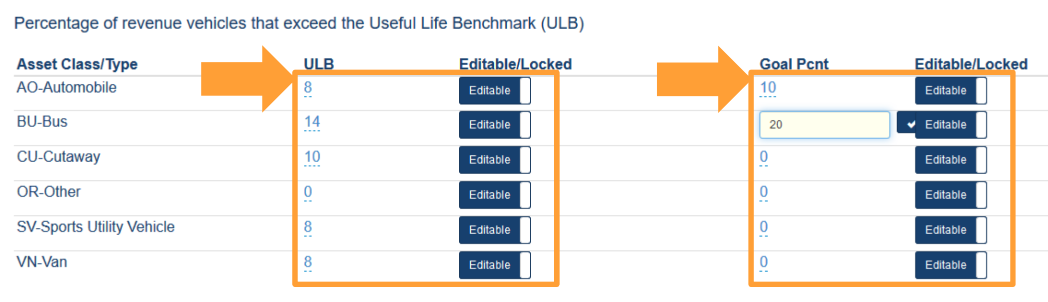
Metrics can be set for each asset category, by selecting the category you wish to edit in the Asset Category dropdown. Assets can be set to locked or editable. Locked assets cannot be changed in the Performance Measures tab for each organization within that group. If you leave any asset as editable,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

Figure 97 Editable and Locked Assets



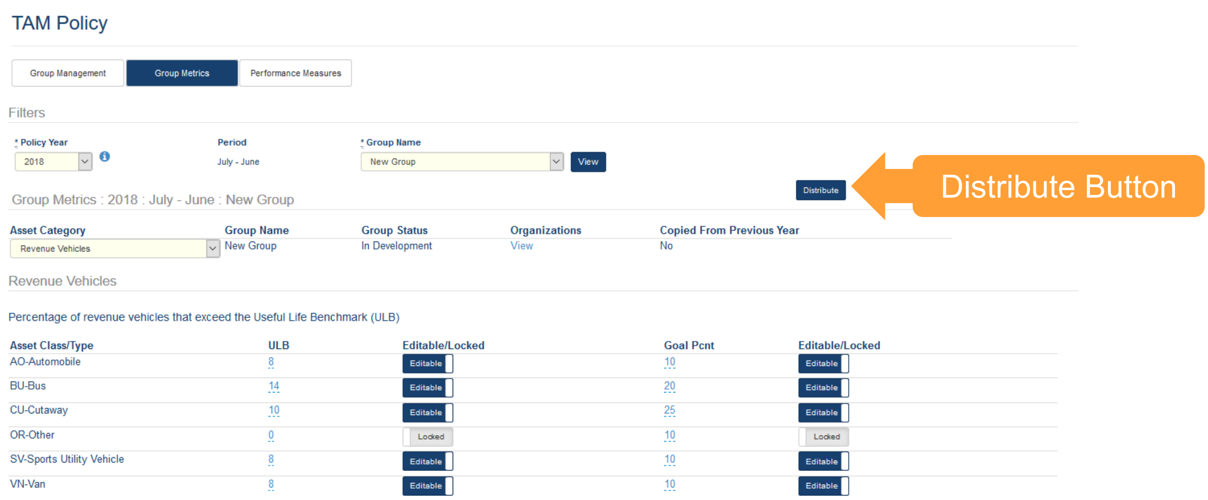
The TAM Policy Group Lead should edit Useful Life Benchmark (ULB), Goal Percent (Goal Pcnt), or other applicable asset metrics as necessary. Fields can be edited by clicking directly on the value in the field, and clicking the checkmark box. Editable/Locked toggles automatically save any changes made.

Figure 98 Asset Type Percentage Settings



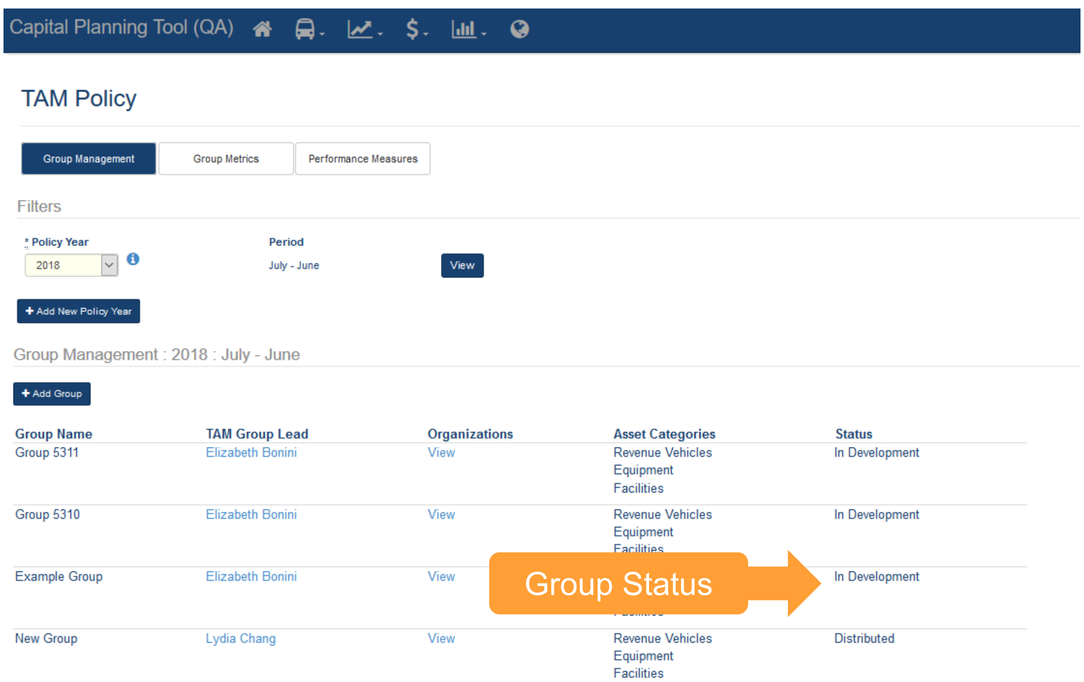
Once completed, click the “Distribute” button to push the group metrics over to the Performance Measures tab for each organization within the group. Each group within a Policy Year can be distributed on an individual basis. If all the Editable/Locked toggles were in a state of “Locked” for every asset 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



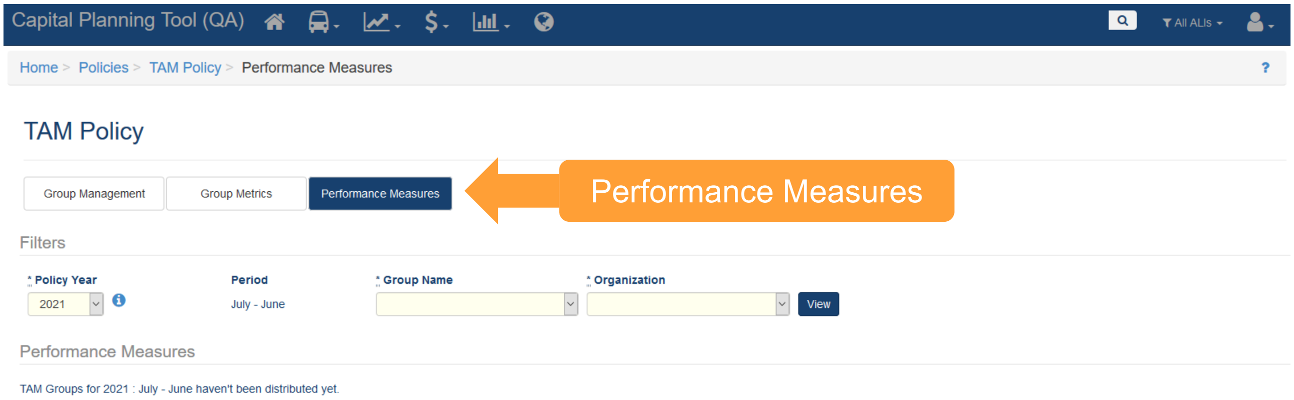
Notice that the group that has been distributed shows Status: Distributed.

Figure 100 Distributed TAM Policy



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

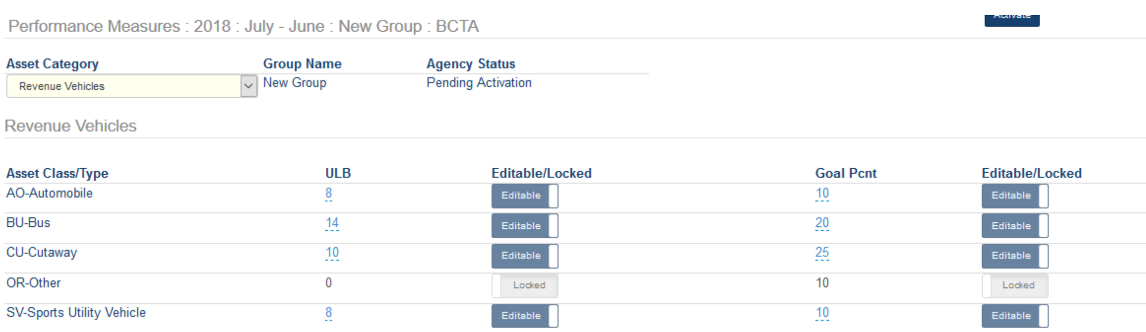


To view an organizations Performance Measures, select the correct Policy Year, Group Name, and Organization and click the "View" button.

Figure 102 Policy Year Filters

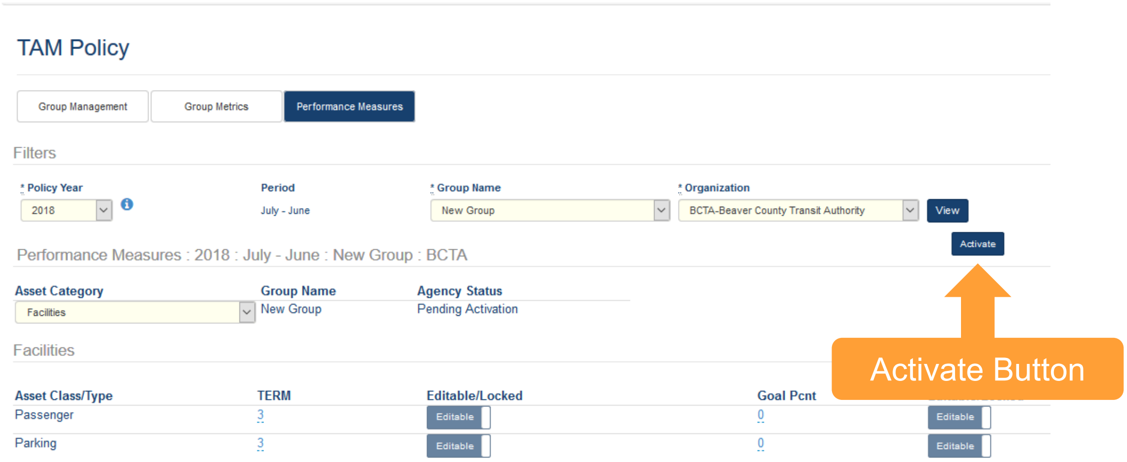
You can select the Asset Category that you wish to view by selecting from the Asset Category dropdown. You can adjust each ULB, TERM value (for Facilities only) or Goal Percent (Goal Pcnt) based on your organization's need. Any Asset Class/Type that is Locked will not be editable.

Figure 103 Asset Type Percentage Settings



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 Perfomance Measures



7.0 Projects

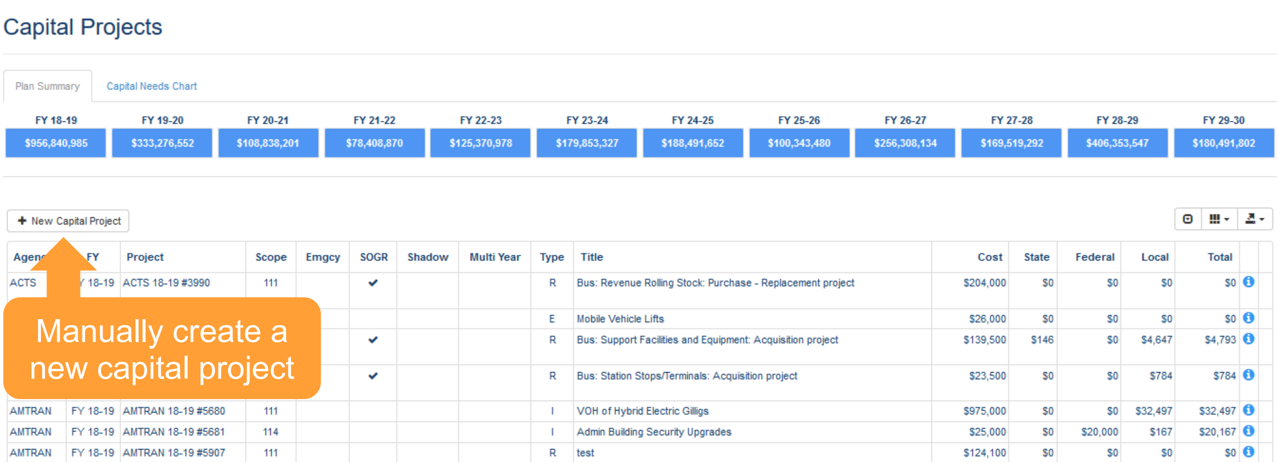
An organization creates a capital project when they want to replace their assets or expand their inventory. Each capital project is composed of one or more building blocks, referred to as Activity Line Items (ALI), and is associated with one or more fiscal years. To frame it differently, ALIs should 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.

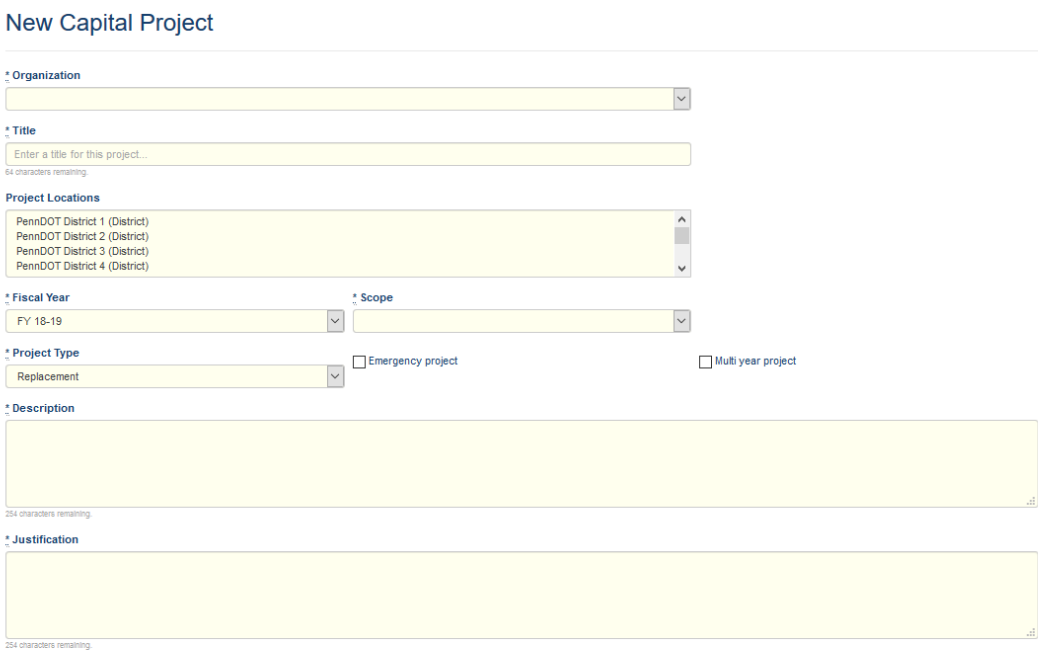
The SOGR projects will automatically be generated by running the State of Good Repair Project Analyzer, which is covered in the project planning section, so we'll quickly review how to create a new capital project manually.

Figure 105 Capital Projects Table



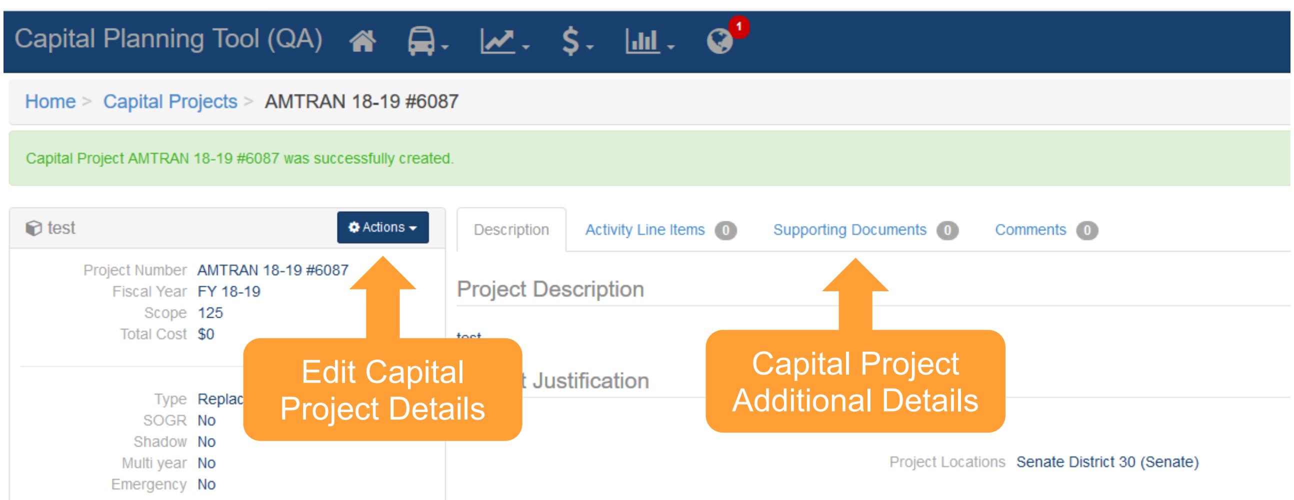
Clicking new capital project will bring you to the new project interface.

Figure 106 New Capital Project



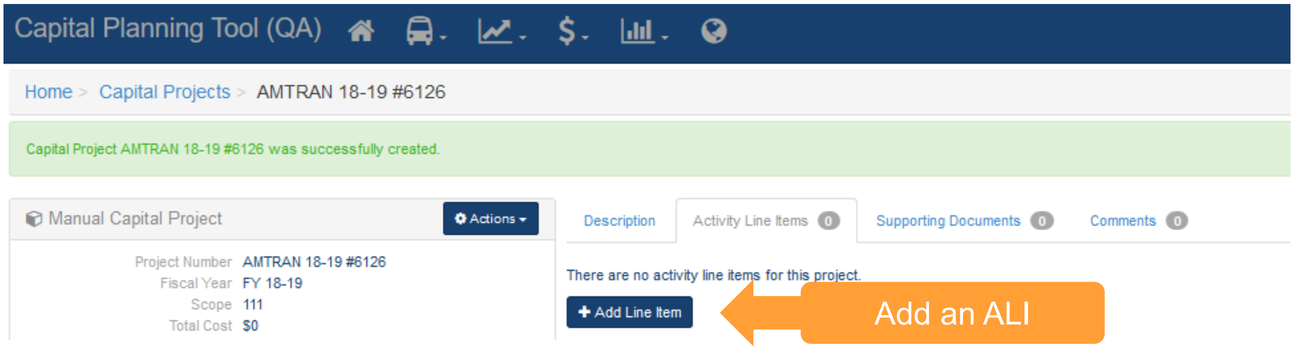
Filling in the required information will bring you to the capital projects detail screen, where you can see detailed information about a capital project and add ALIs and other details.

Figure 107 Capital Project Details



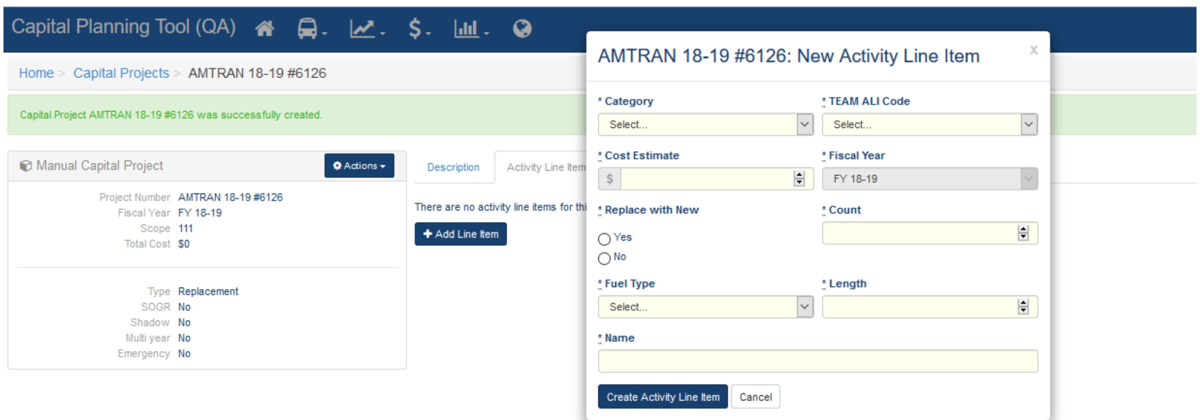
For manually created capital projects, you can add ALIs from the capital project details screen. Click the “Activity Line Items” tab in the additional details, then click the “Add Line Item” button.

Figure 108 Add an ALI



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

Figure 109 Add an ALI Details



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

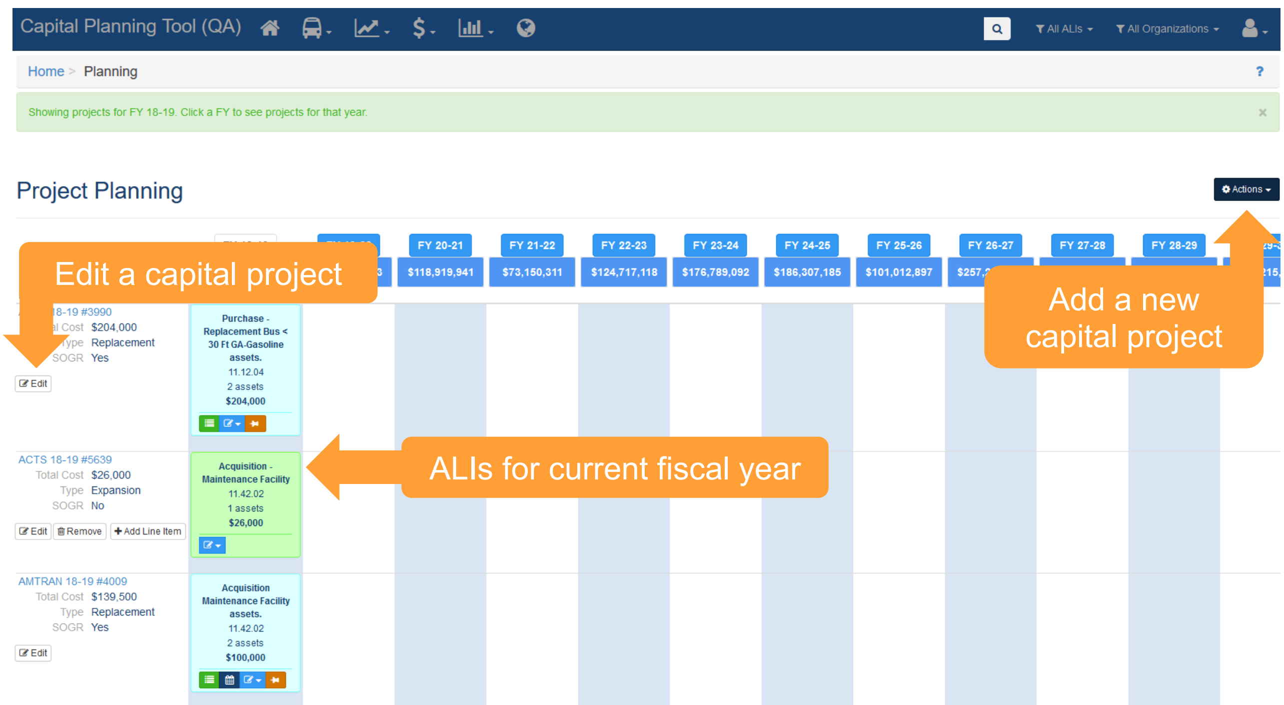
8.1 Project Planner

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.

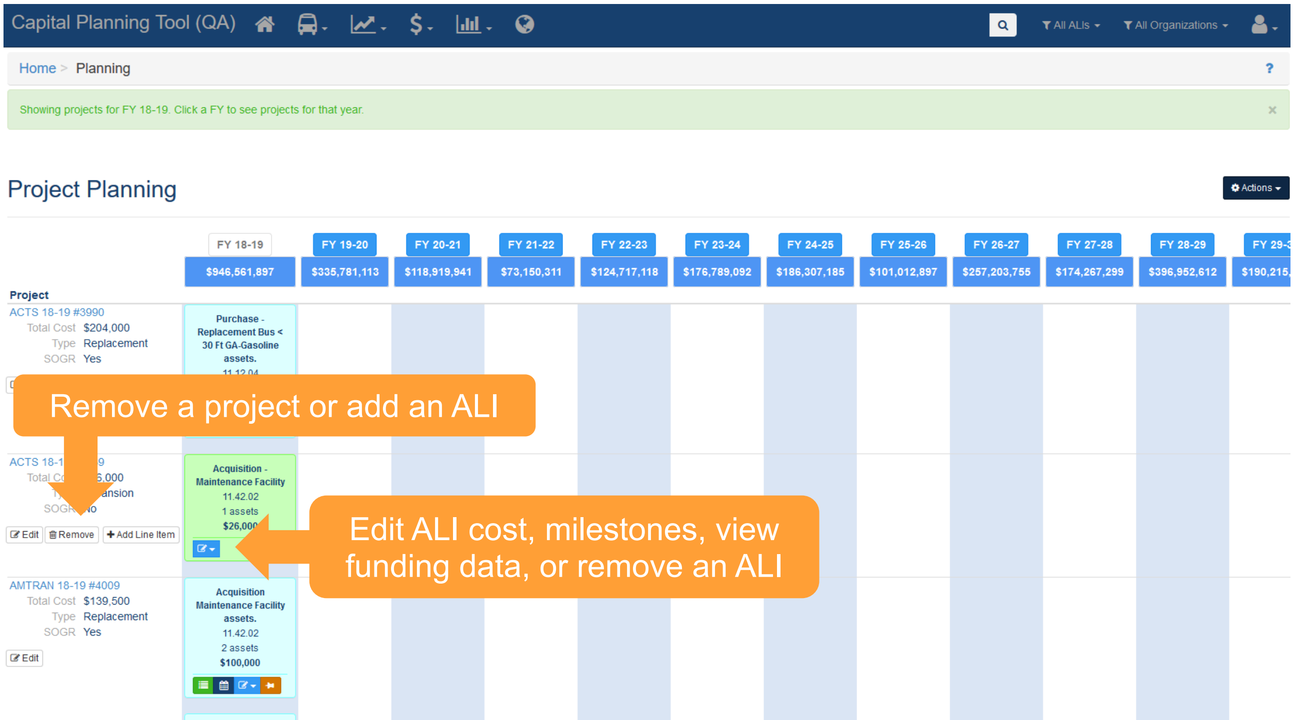
Figure 110 Project Planner Interface



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

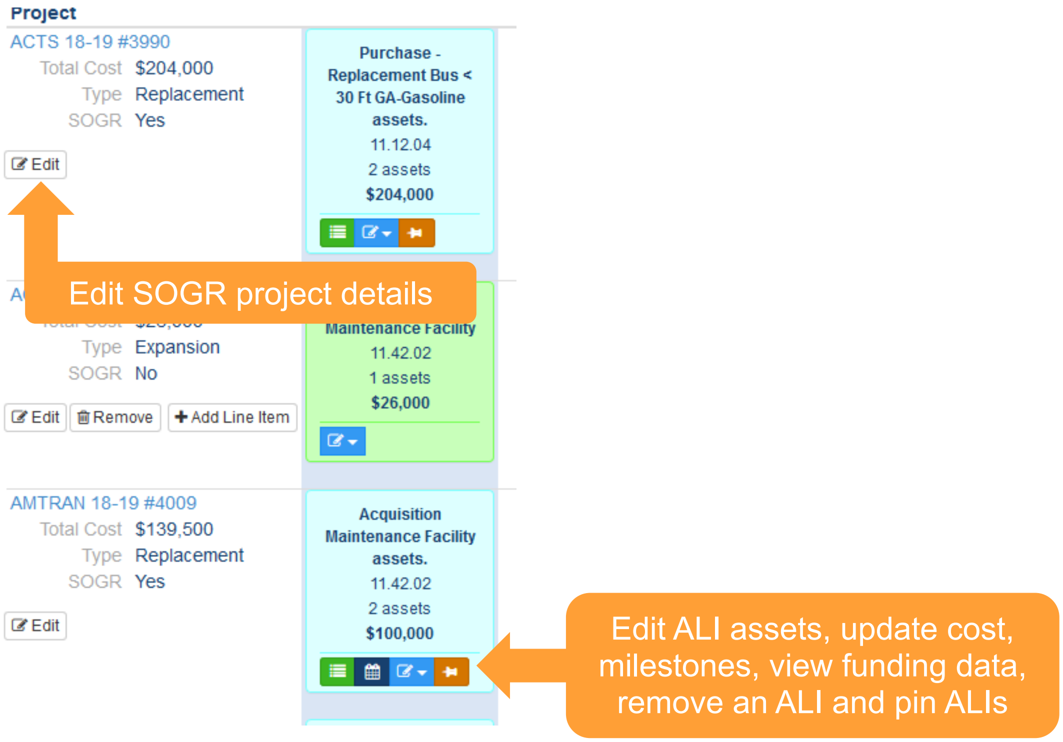
Manually created capital projects can be removed completely and can have additional ALIs added. These actions can be completed by clicking on the "Remove" button or the Add Line Item button on the left-hand side of the planner. ALI details can be viewed or edited by clicking on the icons within each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

Figure 111 Edit Manually Created Capital Projects



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.

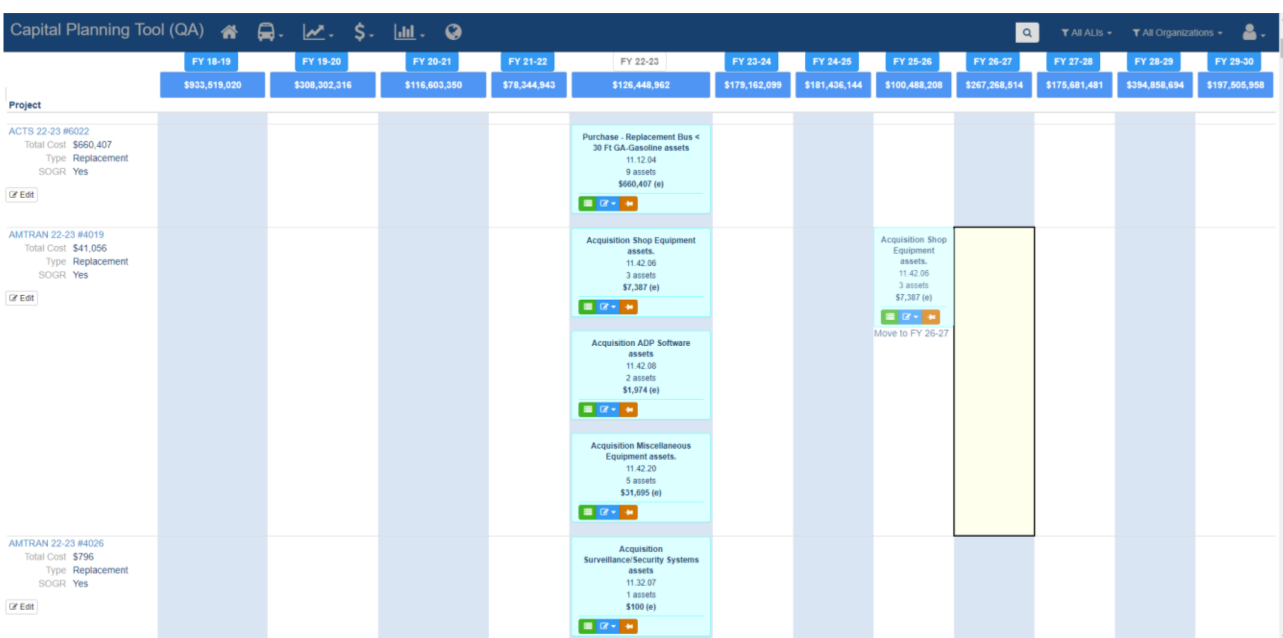
Figure 112 Edit SOGR Capital Projects



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

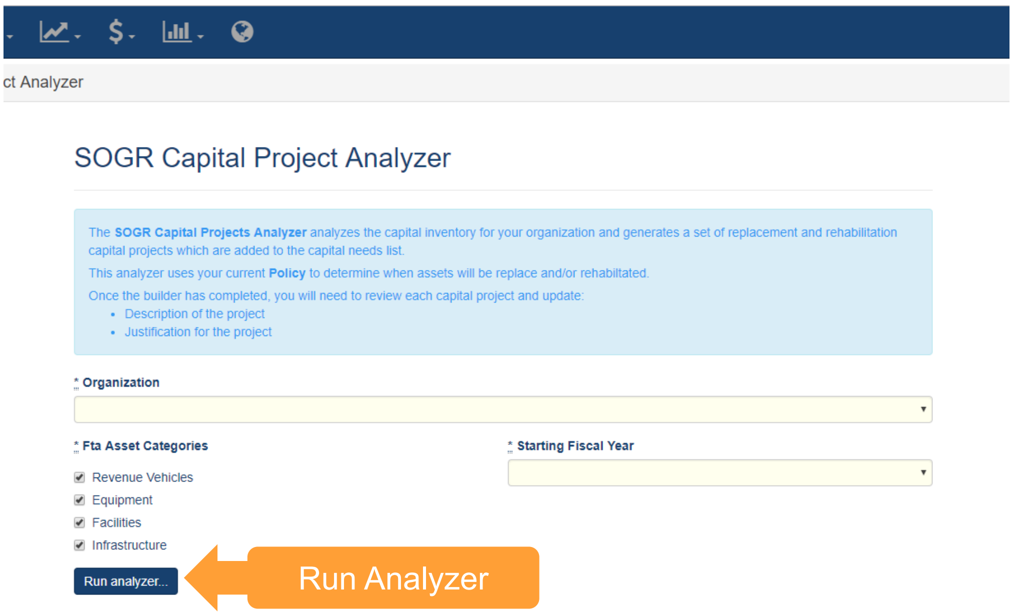
Move ALIs to Different Years



8.2 State of Good Repair (SOGR) Capital Project Analyzer

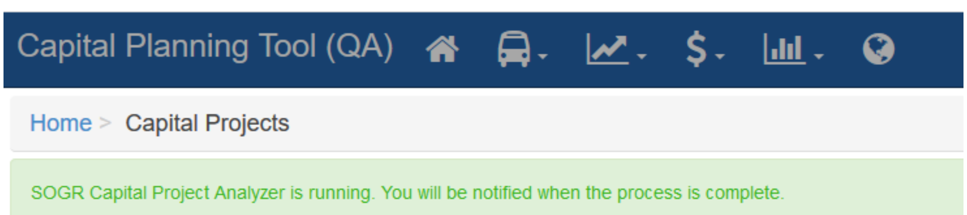
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates 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

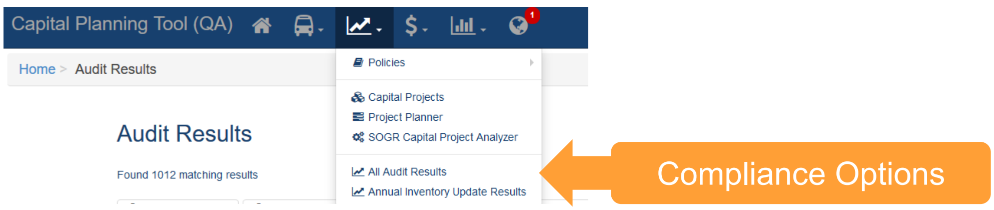


9.0 Compliance

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.

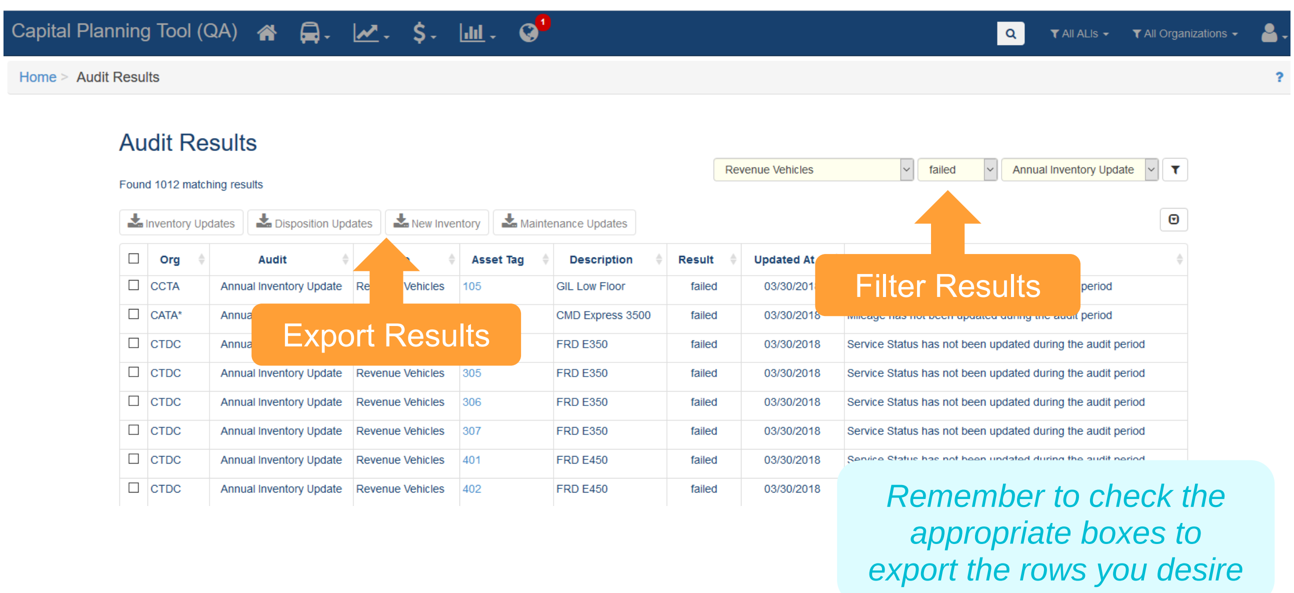
Clicking "All Audit Results" or "Annual Inventory Update Results" will bring you to an overview of the audit process.

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



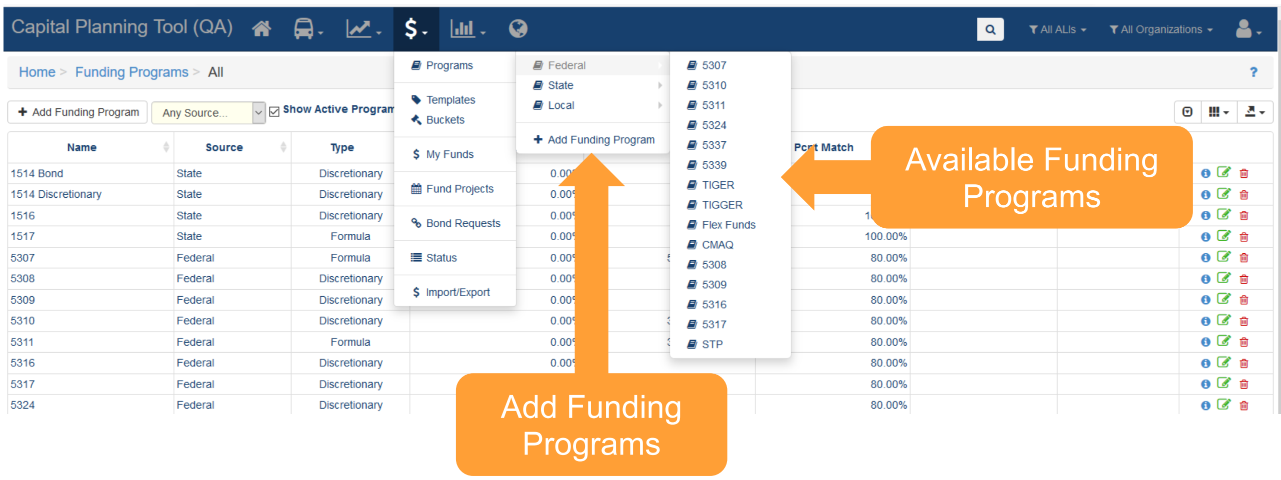
10.0 Funding

Organizations can establish and manage different types of Federal, State, and Local Programs.

10.1 Programs

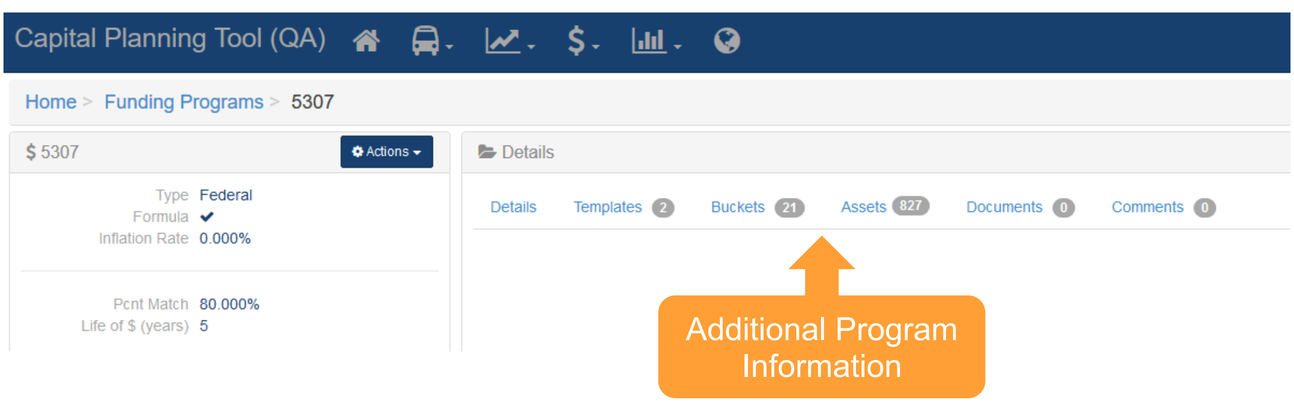
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

Figure 118 Available Funding Programs



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.

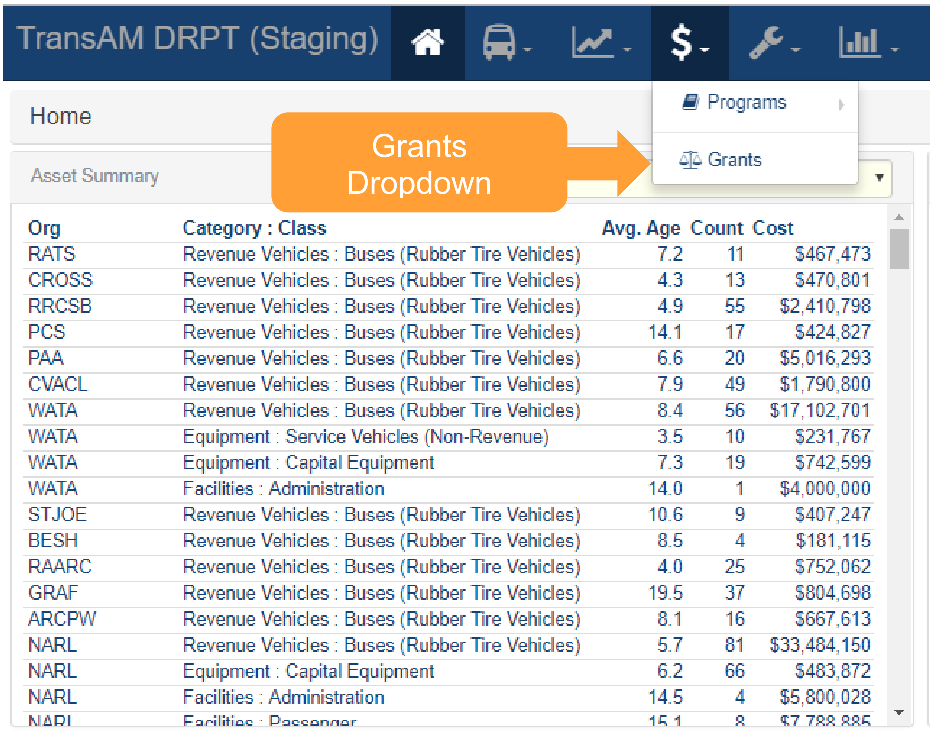
Figure 119 Funding Program Details



10.2 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, an 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.

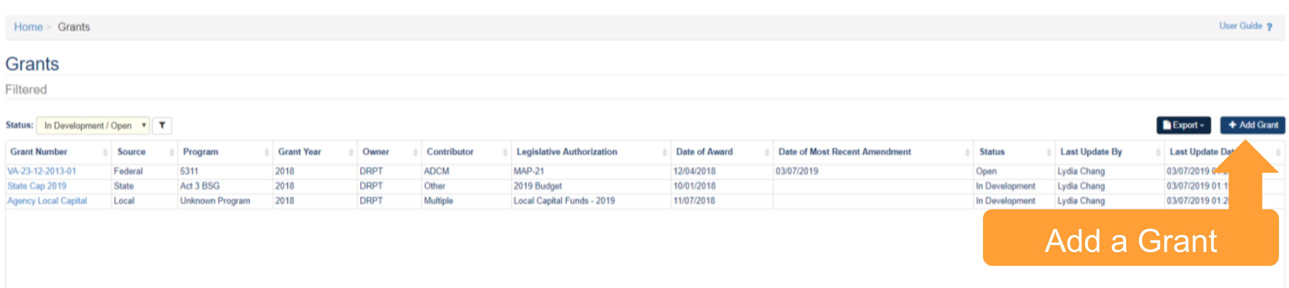
Figure 120 Grants Dropdown



Org	Category : Class	Avg. Age	Count	Cost
RATS	Revenue Vehicles : Buses (Rubber Tire Vehicles)	7.2	11	$467,473
CROSS	Revenue Vehicles : Buses (Rubber Tire Vehicles)	4.3	13	$470,801
RRCSB	Revenue Vehicles : Buses (Rubber Tire Vehicles)	4.9	55	$2,410,798
PCS	Revenue Vehicles : Buses (Rubber Tire Vehicles)	14.1	17	$424,827
PAA	Revenue Vehicles : Buses (Rubber Tire Vehicles)	6.6	20	$5,016,293
CVACL	Revenue Vehicles : Buses (Rubber Tire Vehicles)	7.9	49	$1,790,800
WATA	Revenue Vehicles : Buses (Rubber Tire Vehicles)	8.4	56	$17,102,701
WATA	Equipment : Service Vehicles (Non-Revenue)	3.5	10	$231,767
WATA	Equipment : Capital Equipment	7.3	19	$742,599
WATA	Facilities : Administration	14.0	1	$4,000,000
STJOE	Revenue Vehicles : Buses (Rubber Tire Vehicles)	10.6	9	$407,247
BESH	Revenue Vehicles : Buses (Rubber Tire Vehicles)	8.5	4	$181,115
RAARC	Revenue Vehicles : Buses (Rubber Tire Vehicles)	4.0	25	$752,062
GRAF	Revenue Vehicles : Buses (Rubber Tire Vehicles)	19.5	37	$804,698
ARCPW	Revenue Vehicles : Buses (Rubber Tire Vehicles)	8.1	16	$667,613
NARL	Revenue Vehicles : Buses (Rubber Tire Vehicles)	5.7	81	$33,484,150
NARL	Equipment : Capital Equipment	6.2	66	$483,872
NARL	Facilities : Administration	14.5	4	$5,800,028
NARL	Facilities : Passenger	15.1	8	$7,788,885

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

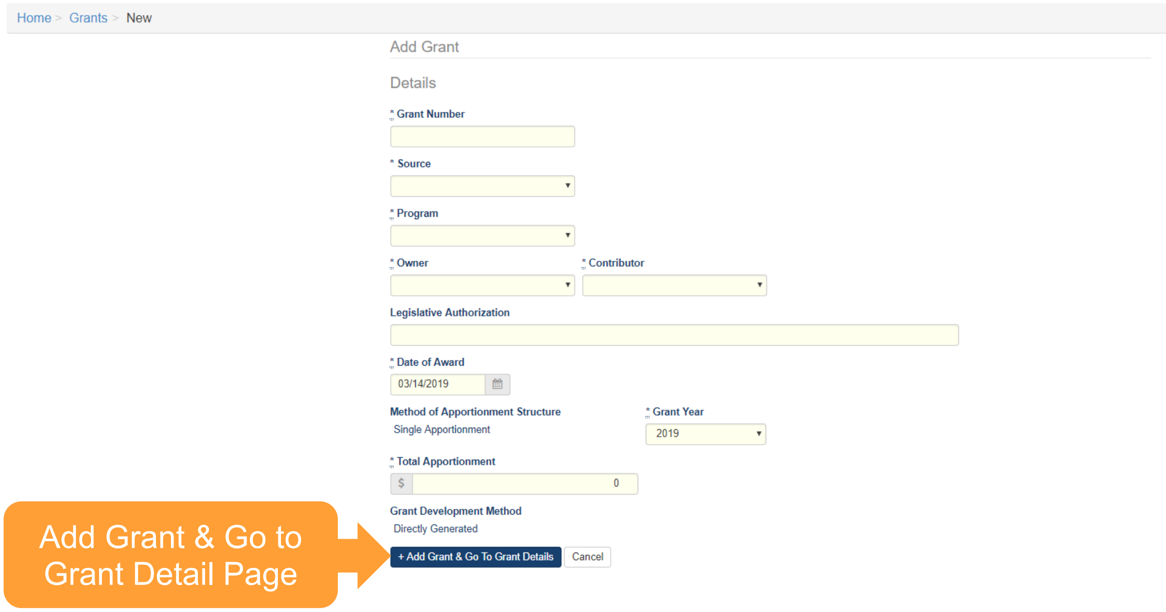
Figure 121 Adding a Grant



Grant Number	Source	Program	Grant Year	Owner	Contributor	Legislative Authorization	Date of Award	Date of Most Recent Amendment	Status	Last Update By	Last Update Dat
VA-23-12-2013-01	Federal	5311	2018	DRPT	ADCM	MAP-21	12/04/2018	03/07/2019	Open	Lydia Chang	03/07/2019
State Cap 2019	State	Act 3 BSG	2018	DRPT	Other	2019 Budget	10/01/2018		In Development	Lydia Chang	03/07/2019 01:1
Agency Local Capital	Local	Unknown Program	2018	DRPT	Multiple	Local Capital Funds - 2019	11/07/2018		In Development	Lydia Chang	03/07/2019 01:2

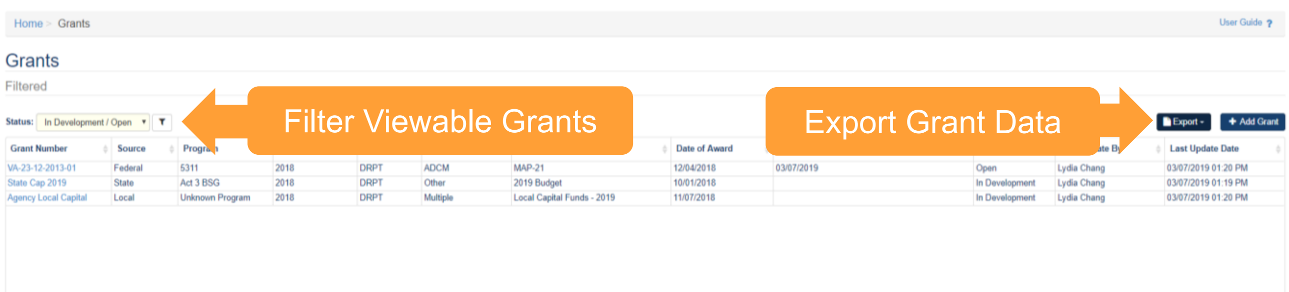
You'll then be directed to fill out all required fields, as depicted on the details tab. Once you add the grant, you will be directed to the grant details page.

Figure 122 Adding Required Details (New Grants)



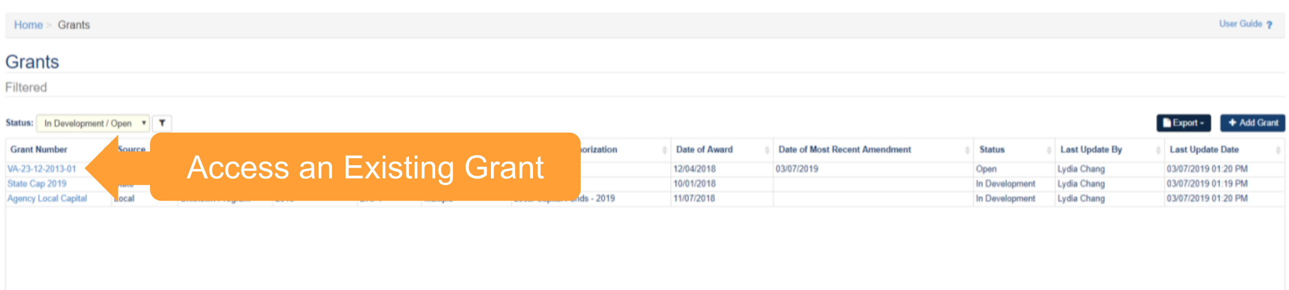
In order to view a complete list of grants, select the Grant option on the Funding dropdown menu, where you will be redirected to the grant table. The grant table is automatically filtered for viewing of grants in both "In Development" and "Open" status. A customized grant export can be exported in multiple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

Figure 123 Grants Table



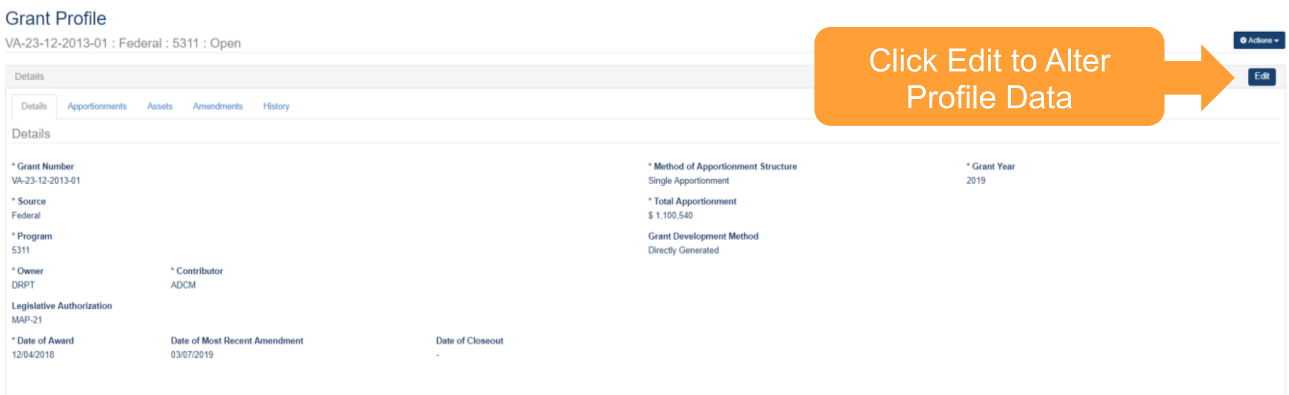
Clicking on the Grant Number text within the row of a grant record, will provide detailed information about that specific grant.

Figure 124 Accessing an Existing Grant



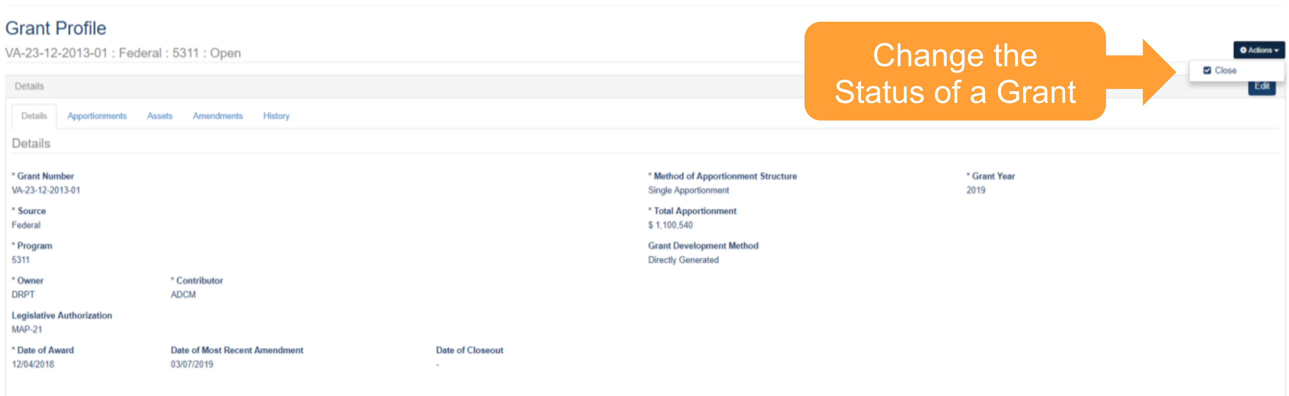
Editing grant profile data allows users to modify core attributes that are not expected to change, but corrections may be necessary from time to time. Profile data can be modified by clicking on the edit button, editing the data, and clicking the "Save" button. Clicking the "Cancel" button will result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

Figure 125 Editing or Updating an Existing Grant



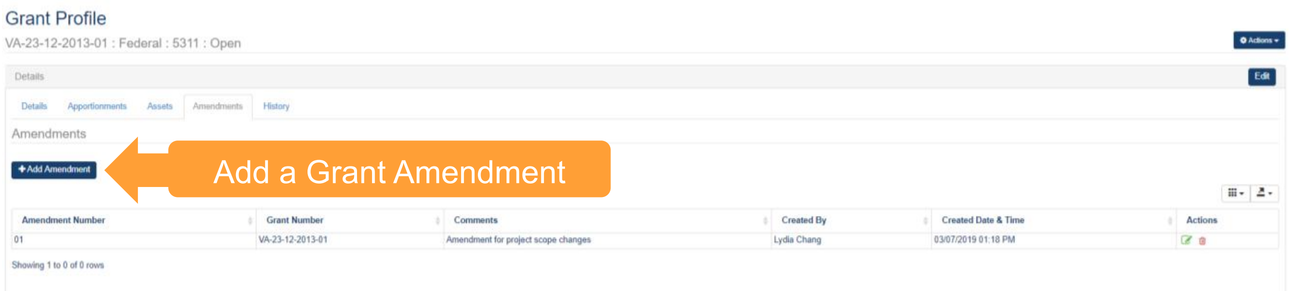
All grants have a three-stage lifecycle: In Development, Open, and Closed. When a grant is first created, it starts in the "In Development" status. Grants in the In Development Status are for those grants that are still being edited and are not ready for use. Once a grant is "Published", it moves to 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 126 Managing the Lifecycle of a Grant



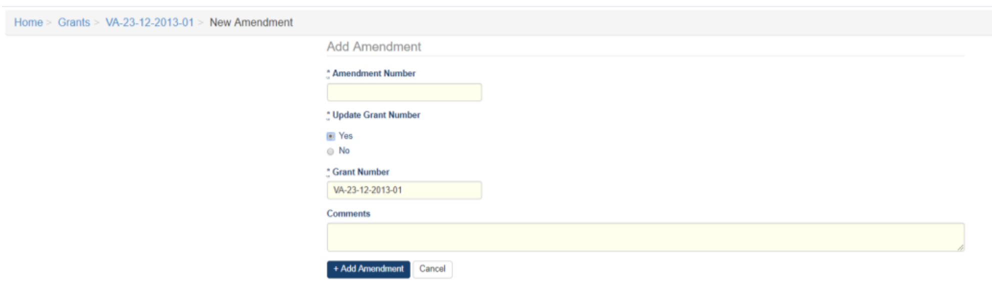
Grant amendments can be managed by accessing the Amendments tab within a grant profile. Existing amendments can be exported, viewed edited, or deleted from the Amendments table. New amendments can be added by selecting the "Add Amendment" button.

Figure 127 Managing Grant Amendments



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.

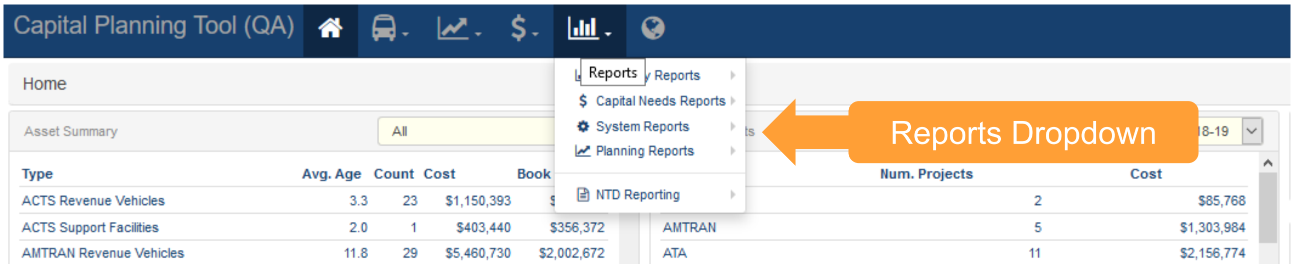
Figure 128 Adding Required Details (Grant Amendments)



11.0 Reports

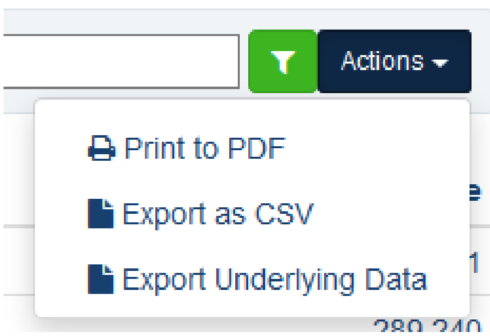
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 129 Reports Dropdown



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 130 Report Exports

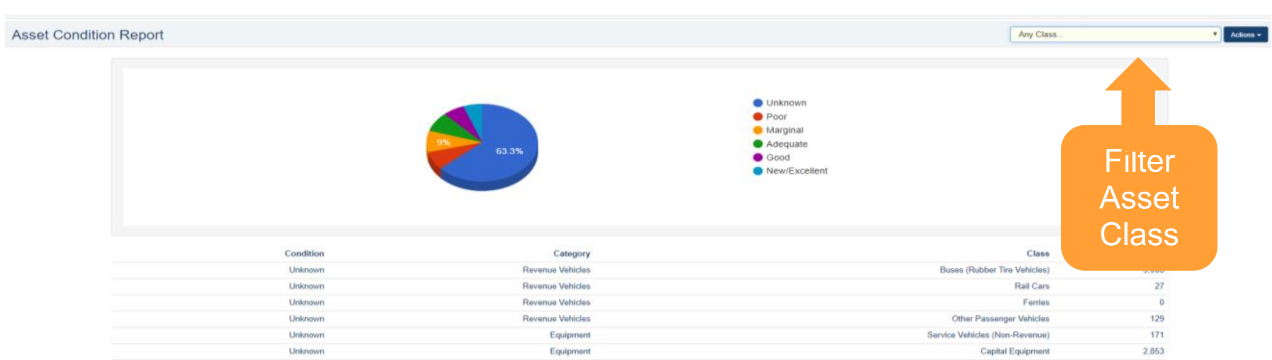


11.1 Inventory Reports

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

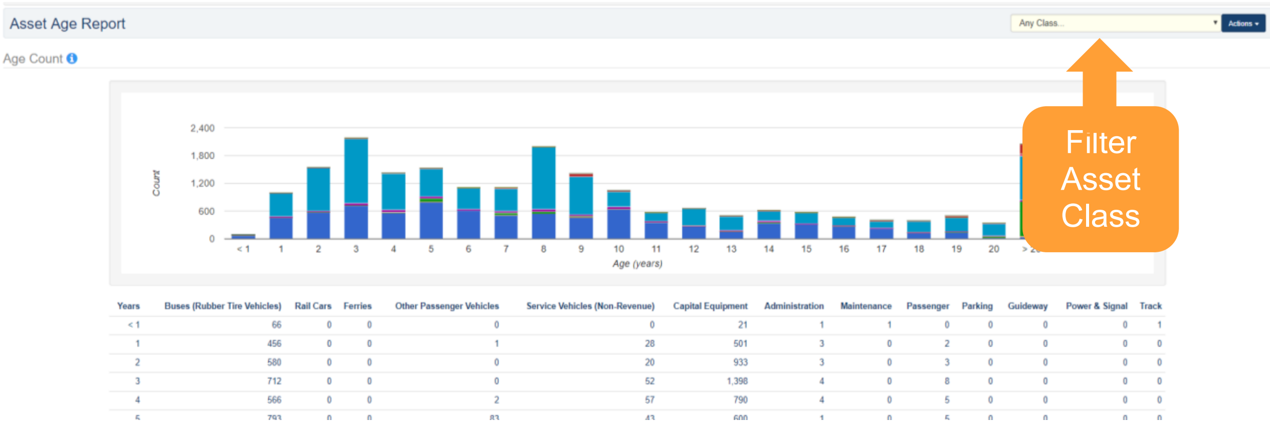
Asset Condition Report—The Asset Condition Report displays the count of assets of different types for a range of asset condition ratings (excellent, good, adequate, etc.). The report can filter data by Asset Class.

Figure 131 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 132 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.

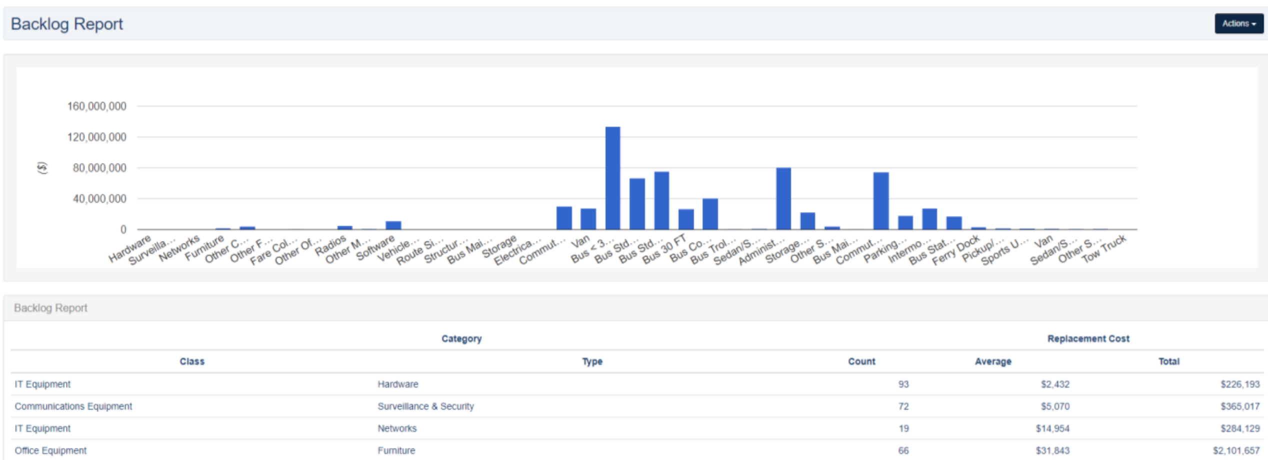
Figure 133 Asset Funding Source Report

11.2 Capital Needs Reports

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

The Backlog Report is a list of all system assets associated with individual organizations. The report entails summary data of assets by Subtype, including total count, average replacement cost, and total replacement cost.

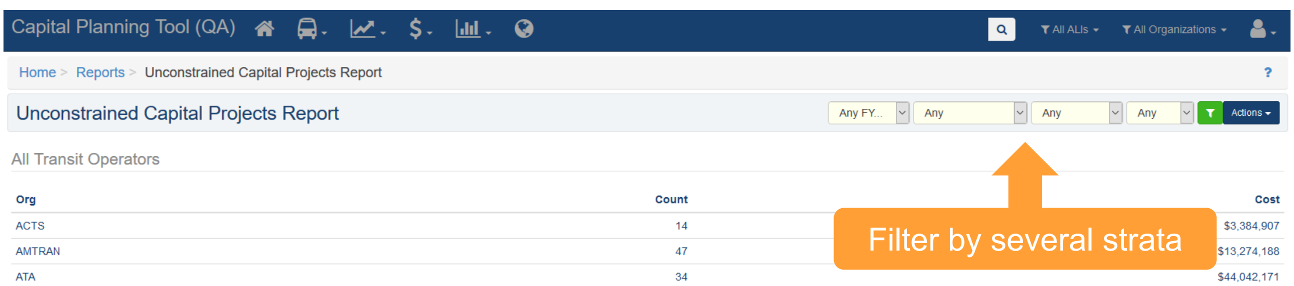
Figure 134 Backlog Report



Category		Count	Replacement Cost	
Class	Type	Count	Average	Total
IT Equipment	Hardware	93	$2,432	$226,193
Communications Equipment	Surveillance & Security	72	$5,070	$365,017
IT Equipment	Networks	19	$14,954	$284,129
Office Equipment	Furniture	66	$31,843	$2,101,657

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 135 Unconstrained Capital Projects Report



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

11.3 System Reports

System reports keep track of system-related functional metrics.

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

Figure 136 Issues Report


Capital Planning Tool (QA)
All ALIs
All Organizations
Home > Reports > Issues Report
Issues Report
Actions

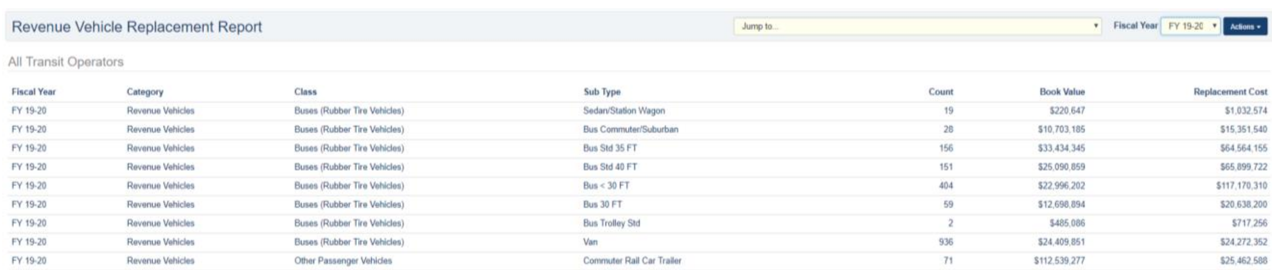
ORGANIZATION	TYPE	DATE/TIME	COMMENTS	BROWSER TYPE	FIRST NAME	LAST NAME	PHONE	ISSUE_STATUS	RESOLUTION_COMMENTS
BPT	Bug	2015-06-10 19:20:41 UTC	When exporting vehicle information from the asset inventory to Excel, fields that have a symbol or check mark are blank in excel. For example, I selected 40ft 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 "Ooops...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 it 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 Glisson of SCTA is attempting to add assets and getting the "Ooops 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 137 Revenue Vehicle Replacement Report


Revenue Vehicle Replacement Report
Jump to...
Fiscal Year FY 19-20
Actions
All Transit Operators

Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	$220,647	$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	$485,086	$717,256
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	936	$24,409,851	$24,272,352
FY 19-20	Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	71	$112,539,277	$25,462,588

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 138 State of Good Repair Report

State of Good Repair Report

Jump to...

Actions

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	$31,357,436
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	$167,850,515	$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	$7,860,493	$11,975,480
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 139 Disposition Report

Disposition Report

Jump to...

Fiscal Year FY 18-19

Actions

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	$3,138,453	$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 140 Asset Service Life Summary Report

Capital Planning Tool (QA)

All ALIs

All Organizations 3/64

Home > Reports > Asset Service Life Summary Report

?

Asset Service Life Summary Report

Asset Type Revenue Vehicles

Months Past ESL Min 1

Months Past ESL Max

Actions

Organization	Subtype	Quantity	# Past ESL (Mo.)	Pcnt	# Past ESL (Mi.)	Pcnt	# Past TERM Thres	Pcnt
All (Filtered) Organizations	Bus < 30 FT	123	55	45%	29	24%		63%
All (Filtered) Organizations	Bus 30 FT	9	6	67%	9	100%		
All (Filtered) Organizations	Bus Commuter/Suburban	14	0	0%	0	0%		

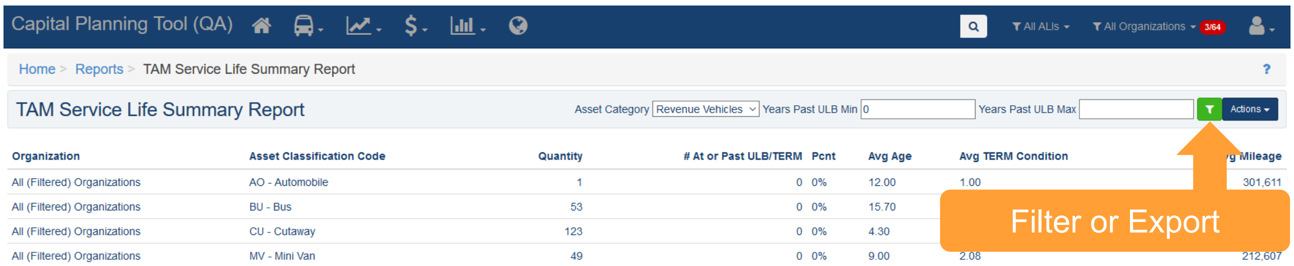
Filter or Export

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 141 TAM Service Life Summary Report



12.0 Specialized Reports

12.1 Asset Fleet Builder

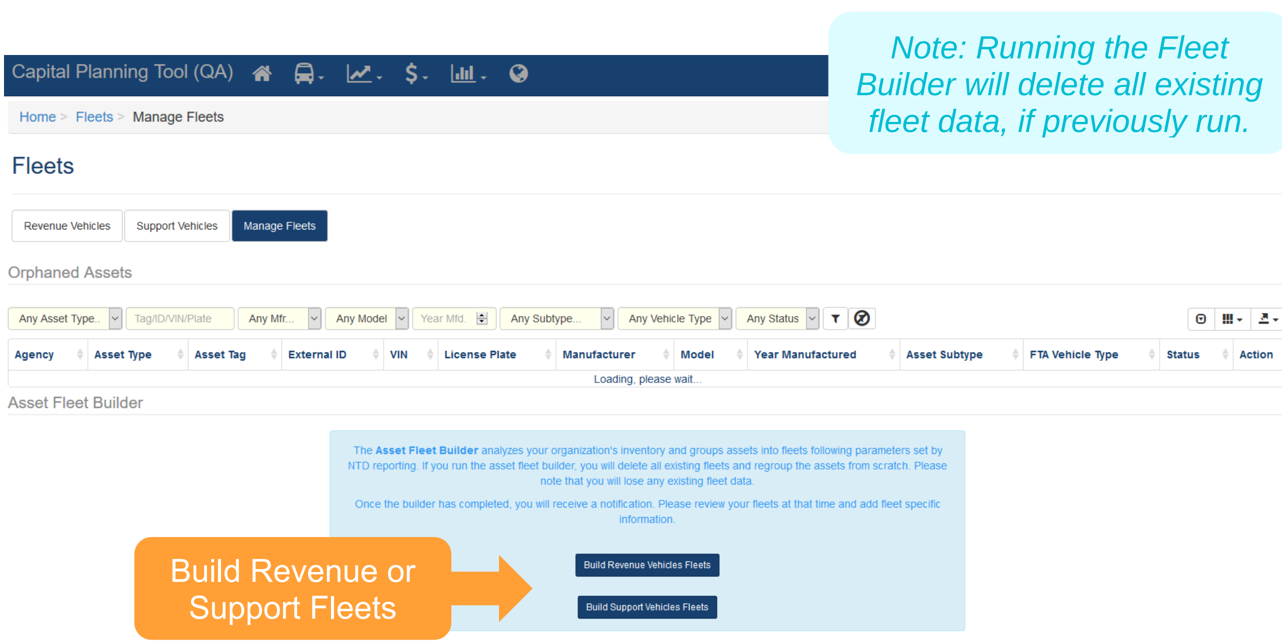
A fleet is a number of vehicles that share the same characteristics. Organizing vehicles into fleets is advantageous because it summarizes rolling stock inventories at a higher level.

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.

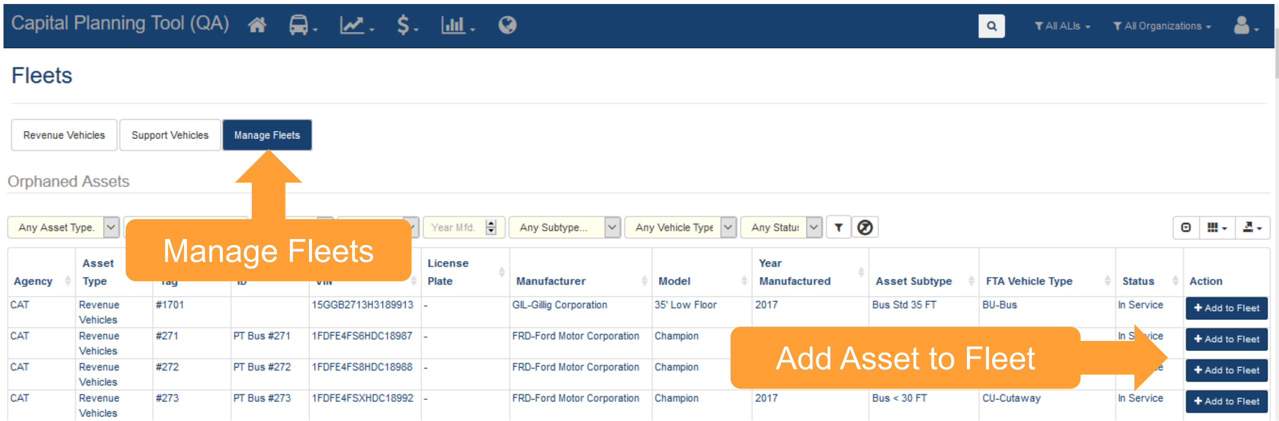
You should only use the builder tool the first time you create a fleet, otherwise you will delete existing fleets.

Figure 142 Asset Fleet Builder



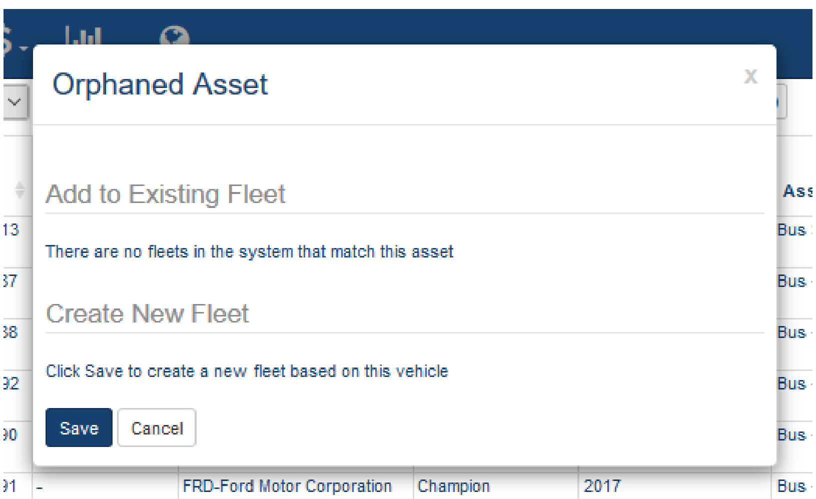
When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 143 Asset Fleet Builder—Orphaned Assets



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 144 Adding an Orphaned Asset to a Fleet



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 145 Adding a New Fleet

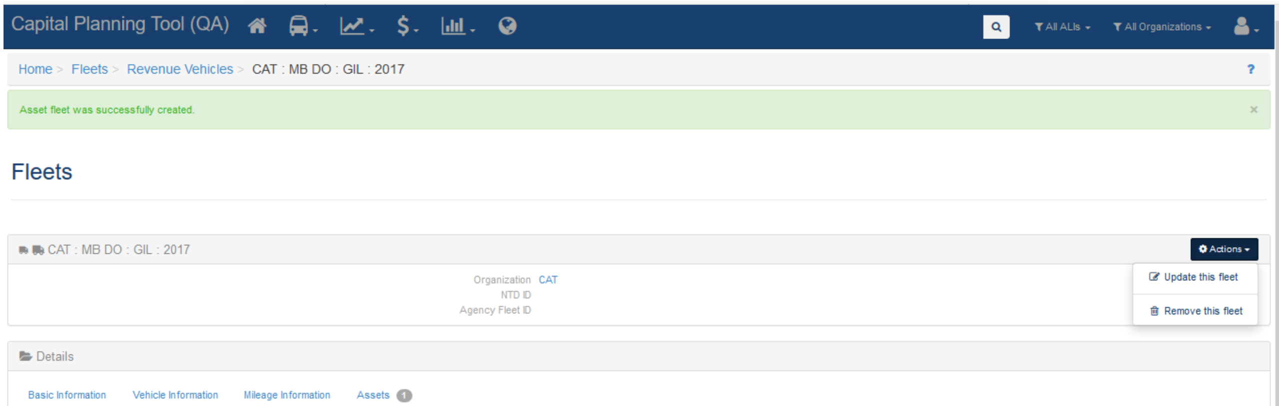


Figure 146 Update Asset Fleet Details

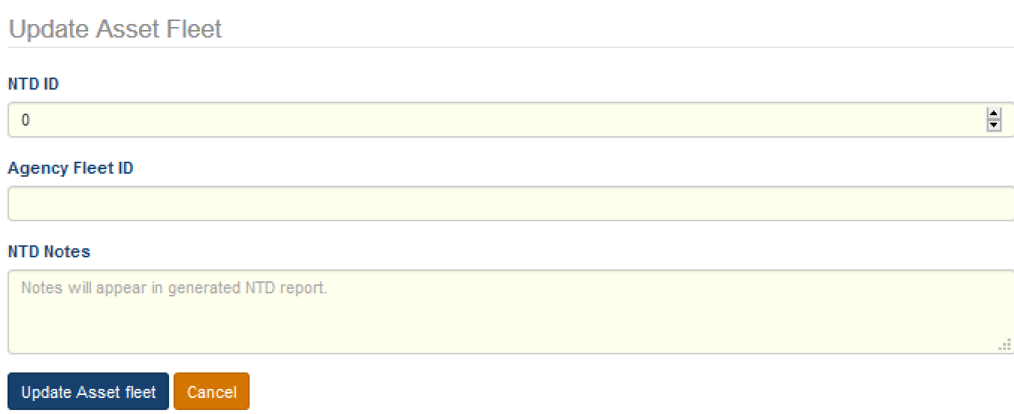


Figure 147 Update Odometer Readings

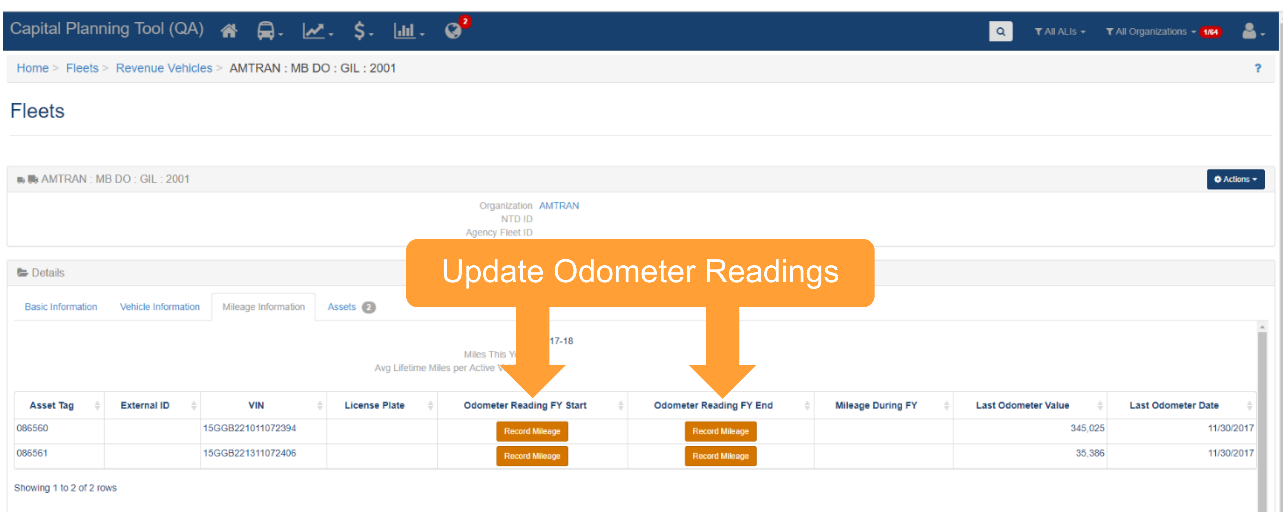
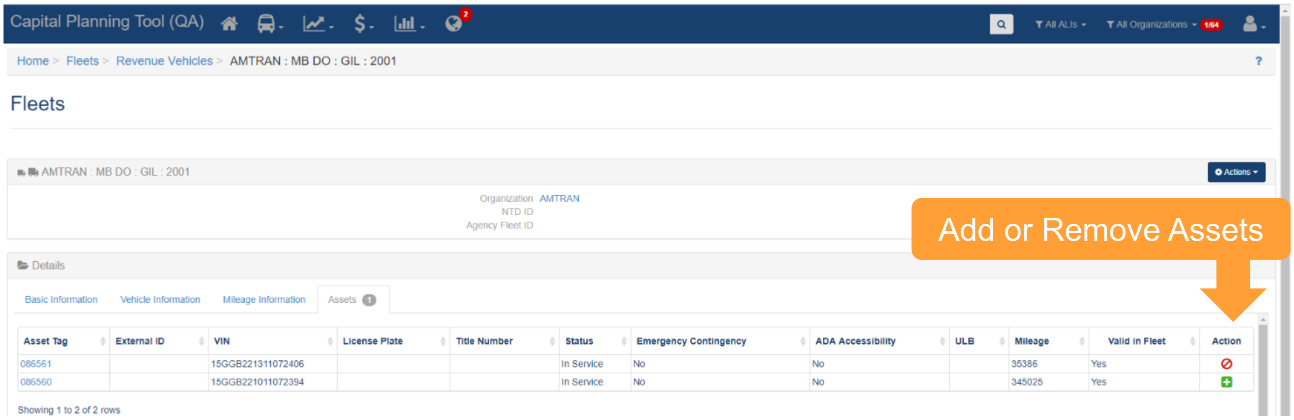


Figure 148 Remove or Add Assets from within a Fleet



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:

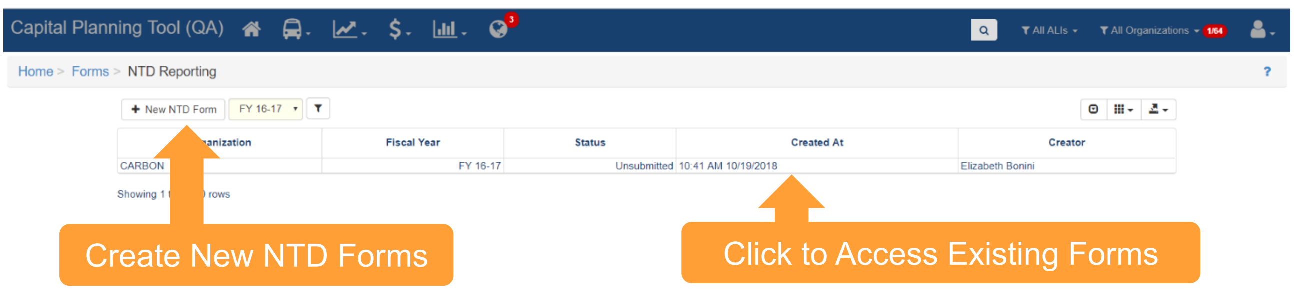
- Facilities (A-15) — Pulls asset data for primary facilities.
- Infrastructure (A-20) — Pulls asset data for infrastructure assets, and produces a separate report for each Primary Mode/Type of Service unique combination.
- Revenue Vehicles (A-30) — Pulls asset data for revenue vehicles, which are included 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 149 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 150 Table of Previously Generated NTD Reports



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 151 Create New Reporting Year Forms

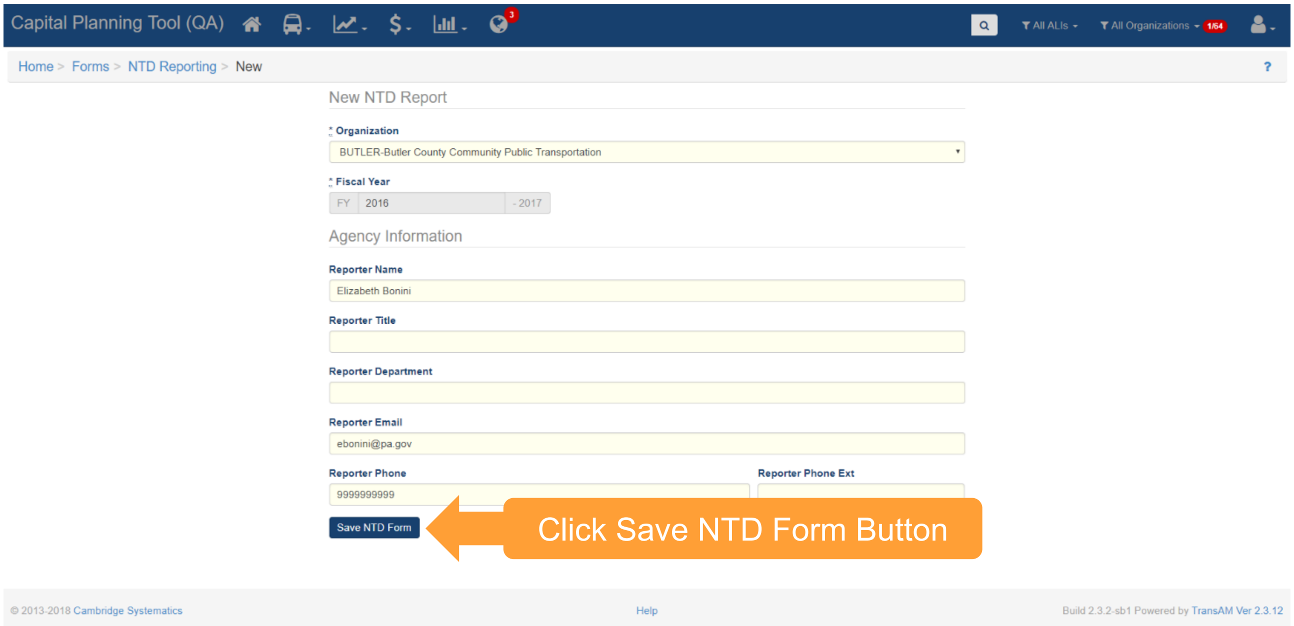
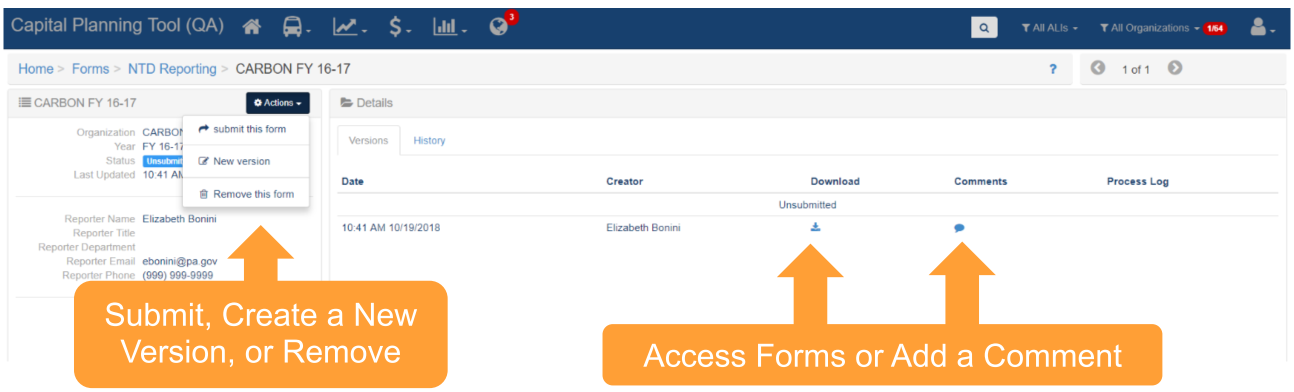
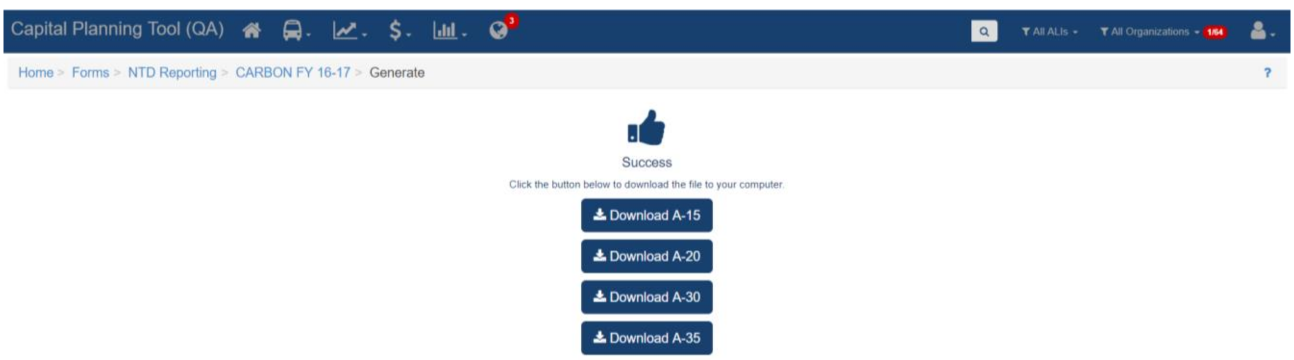


Figure 152 NTD Report Details and Data



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 153 Download each NTD Form



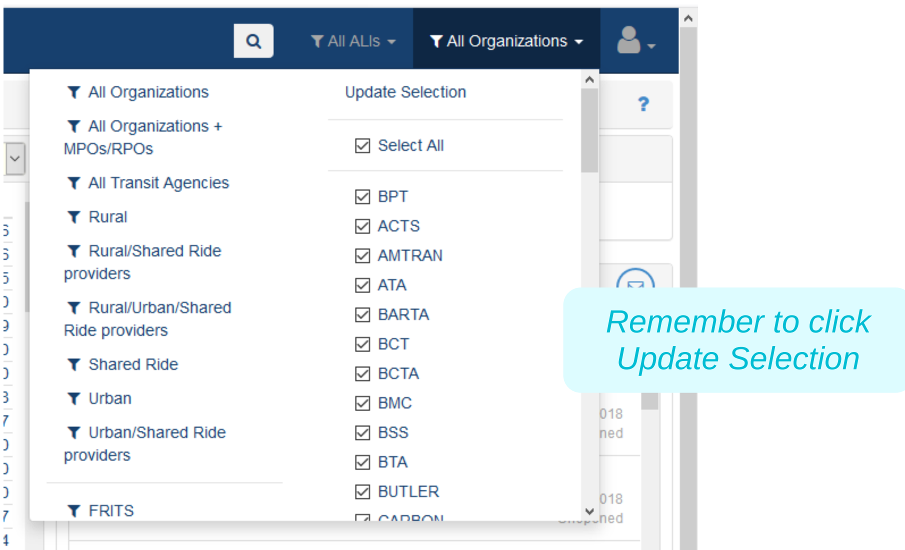
13.0 Admin Tools

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

Figure 154 Admin User and Organization Options

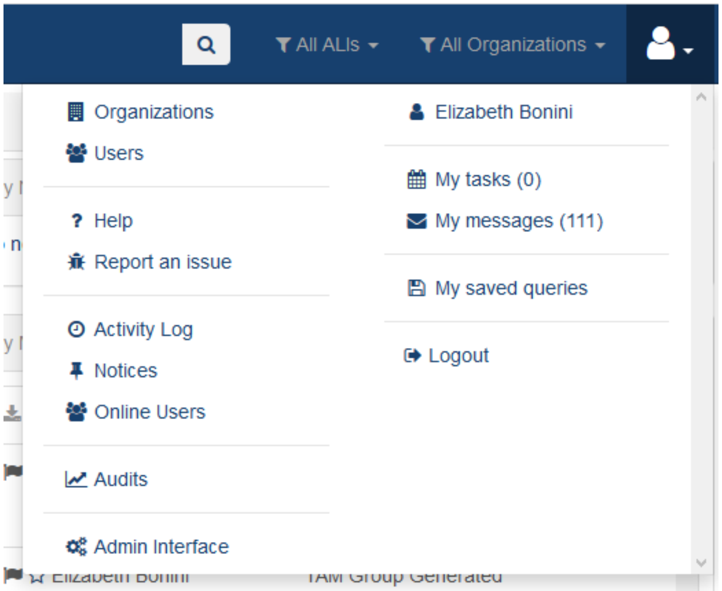
Clicking "All Organizations" provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

Figure 155 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.

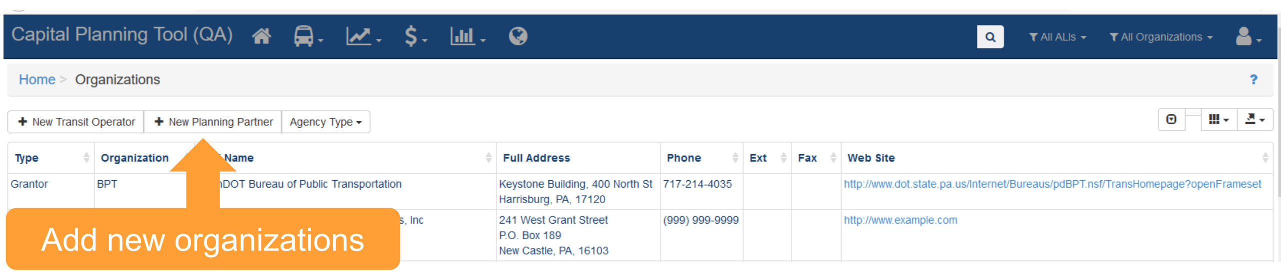
Figure 156 Admin User Options



13.1 Organizations

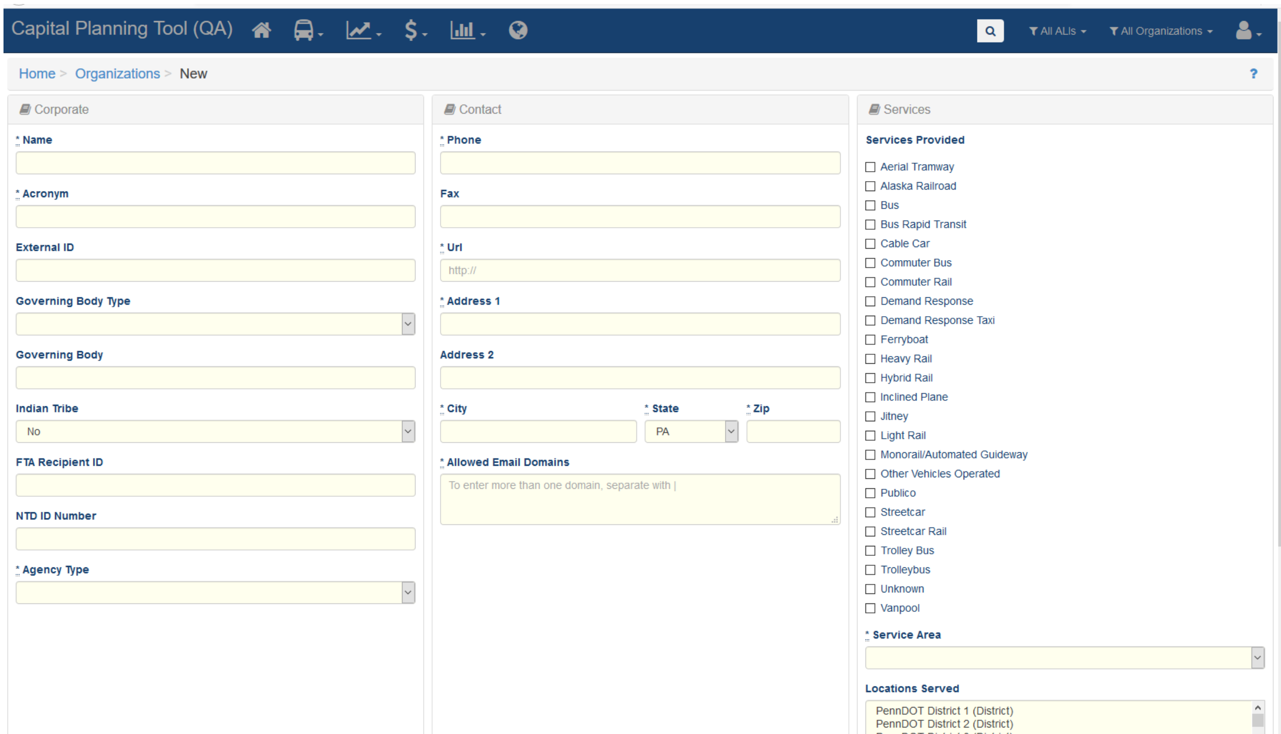
The organizations page provides an overview of each organization, its type, and an interface for adding new agencies.

Figure 157 Admin Organizations



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

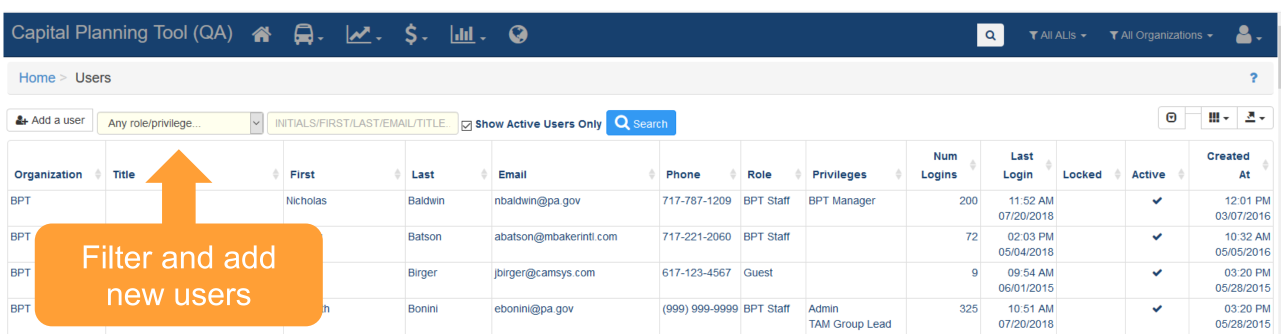
Figure 158 Add an Organization



13.2 Users

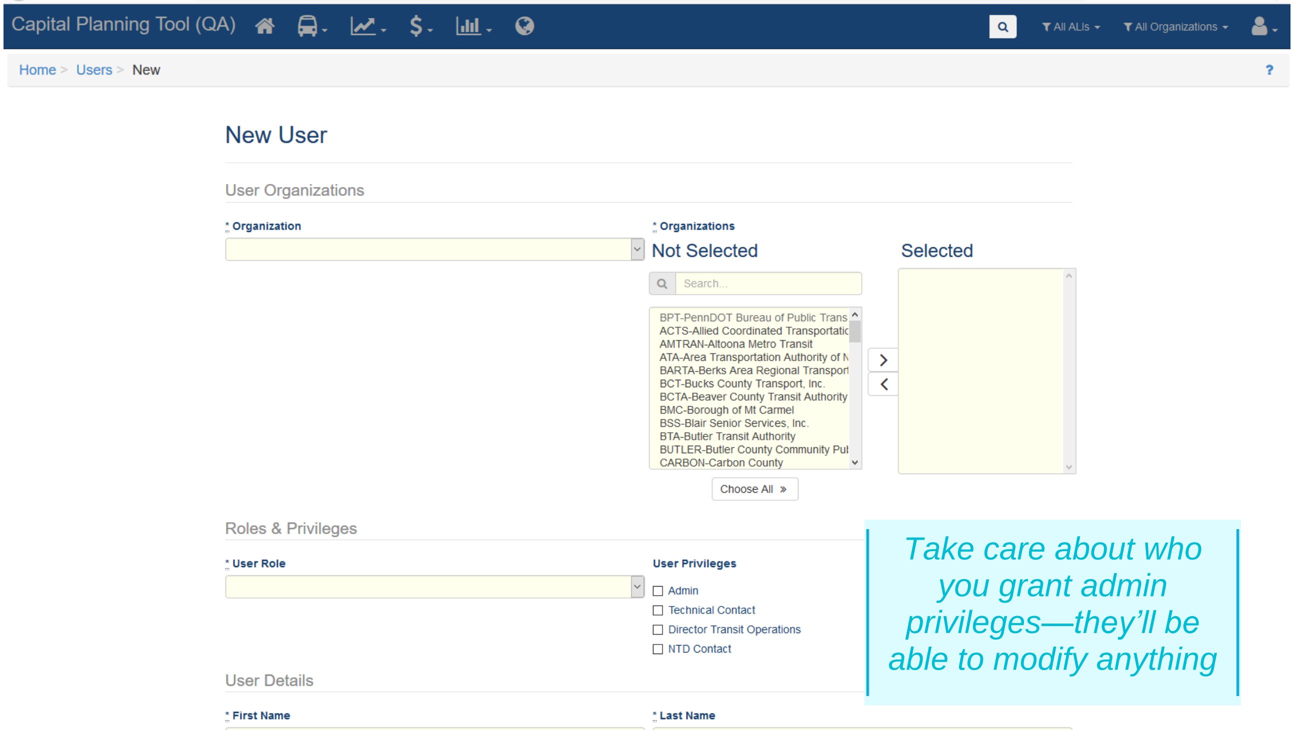
The users page also has some additional functionality. It provides an overview of all users in the system, and provides the ability to add new users or filter user data.

Figure 159 Admin Users



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 160 Add a User

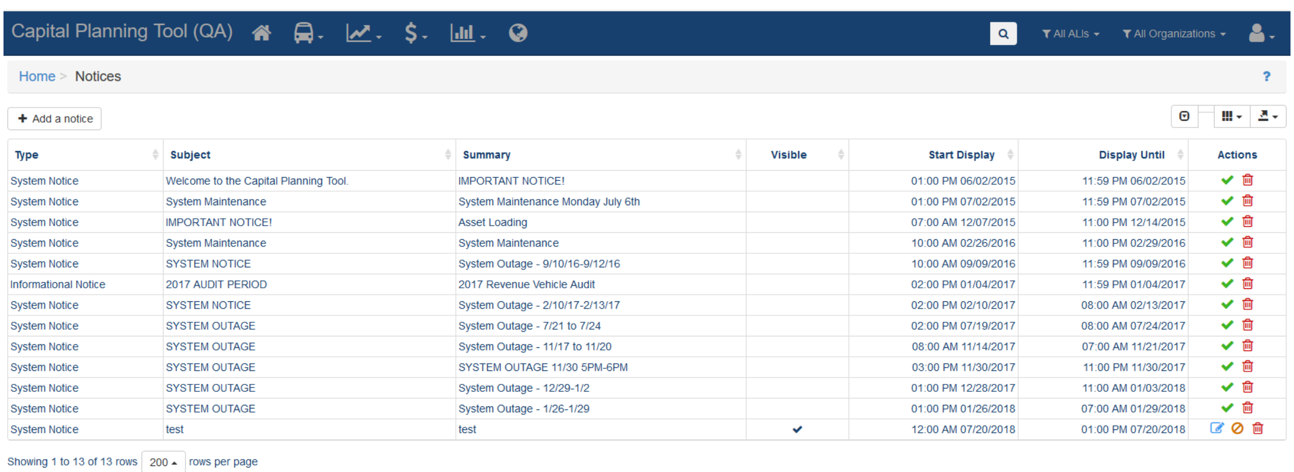


Take care about who you grant admin privileges—they'll be able to modify anything

13.3 Notices

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

Figure 161 Notices

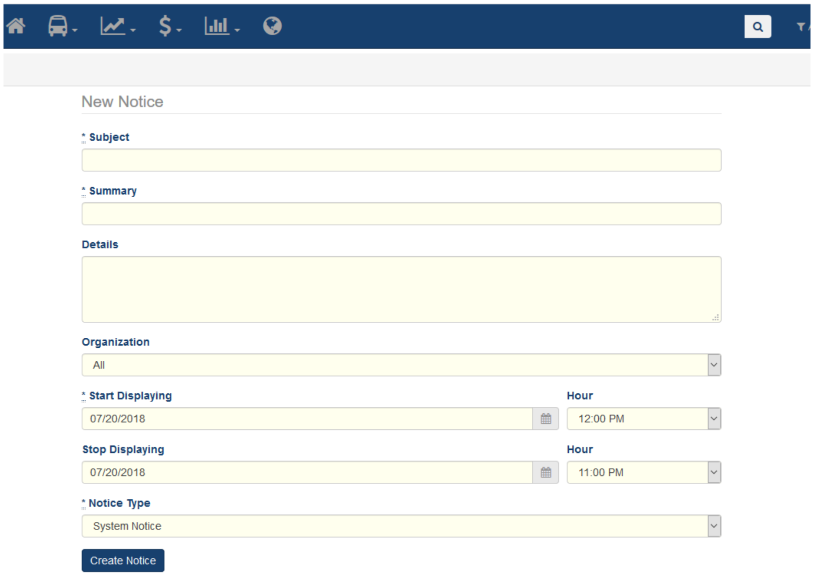


Type	Subject	Summary	Visible	Start Display	Display Until	Actions
System Notice	Welcome to the Capital Planning Tool.	IMPORTANT NOTICE!		01:00 PM 06/02/2015	11:59 PM 06/02/2015	
System Notice	System Maintenance	System Maintenance Monday July 6th		01:00 PM 07/02/2015	11:59 PM 07/02/2015	
System Notice	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

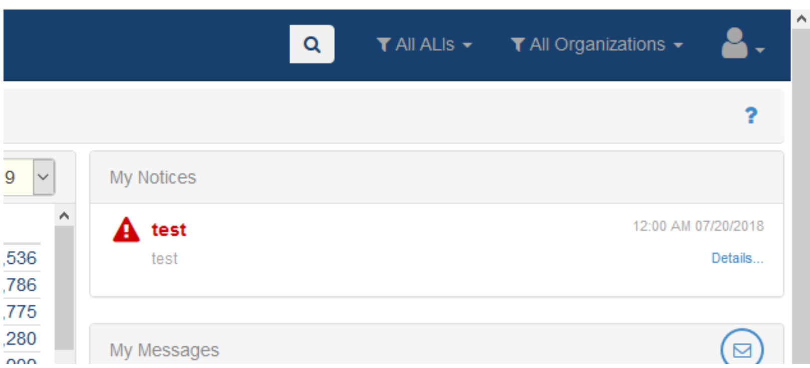
Click Add a notice to create a new one. You can specify temporal and organization parameters.

Figure 162 Add a Notice



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

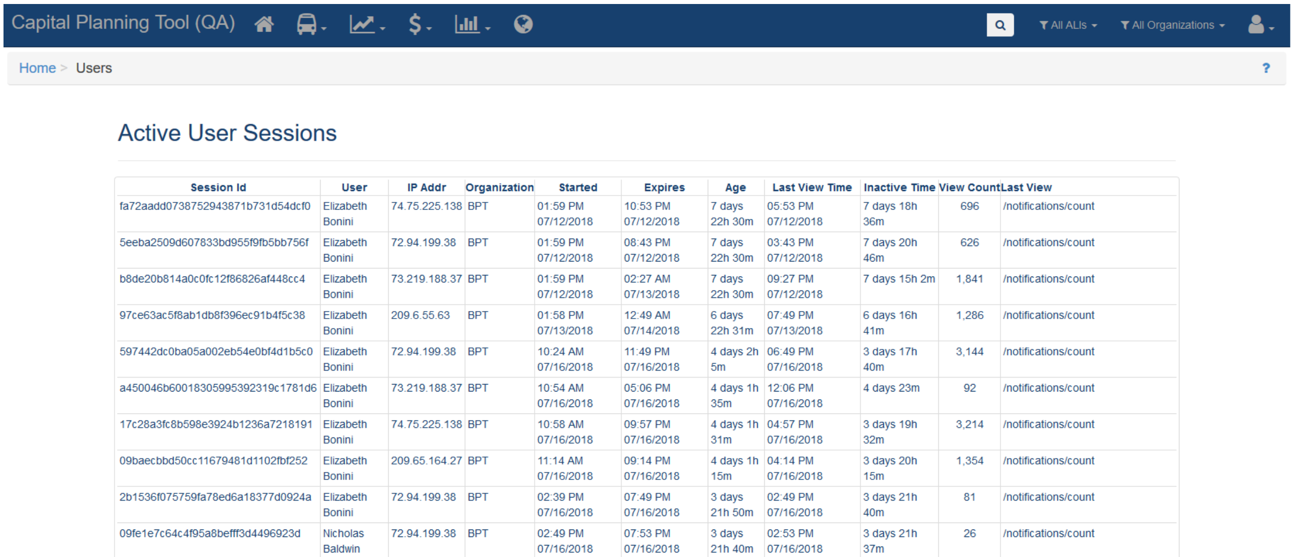
Figure 163 Notice on the Dashboard



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 164 Active Users



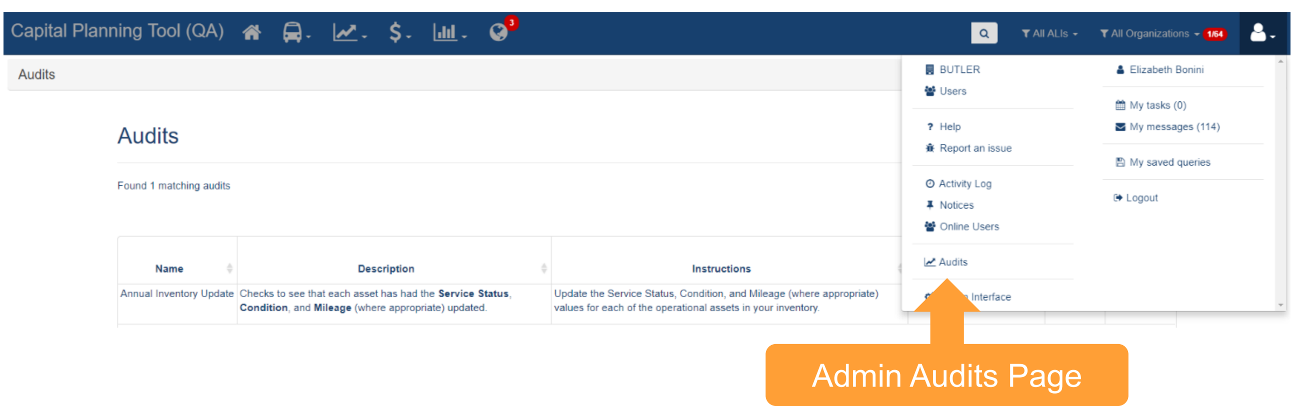
Session Id	User	IP Addr	Organization	Started	Expires	Age	Last View Time	Inactive Time	View Count	Last View
fa72aadd0738752943871b731d54dcf0	Elizabeth Bonini	74.75.225.138	BPT	01:59 PM 07/12/2018	10:53 PM 07/12/2018	7 days 22h 30m	05:53 PM 07/12/2018	7 days 18h 36m	696	/notifications/count
5eeba2509d607833bd955f9fb5bb756f	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
09baecbbd50cc11679481d1102fbf252	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 15m	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.

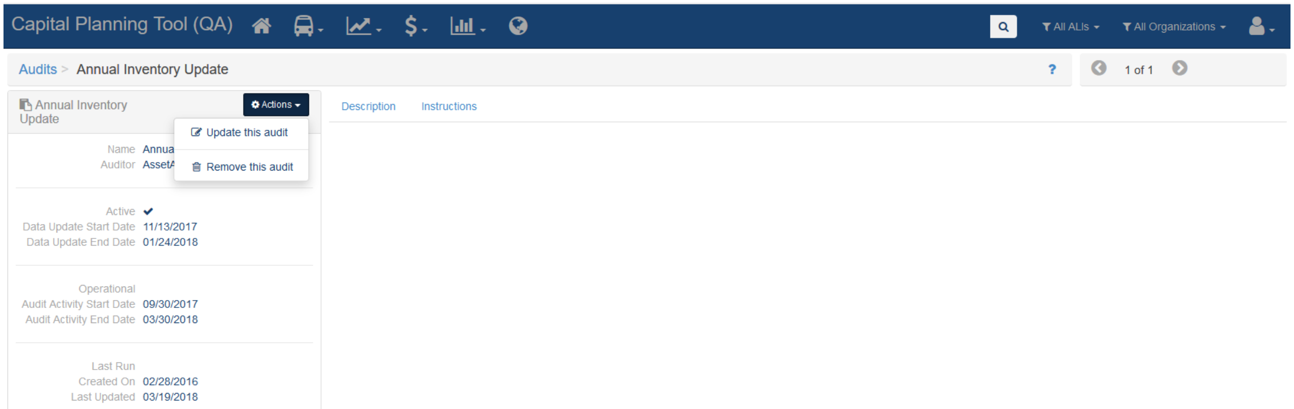
The admin audits page summarizes all available Audits and can be accessed through the Audits link within the User Menu.

Figure 165 Admin Audits Page



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 166 Admin Audits Details Page

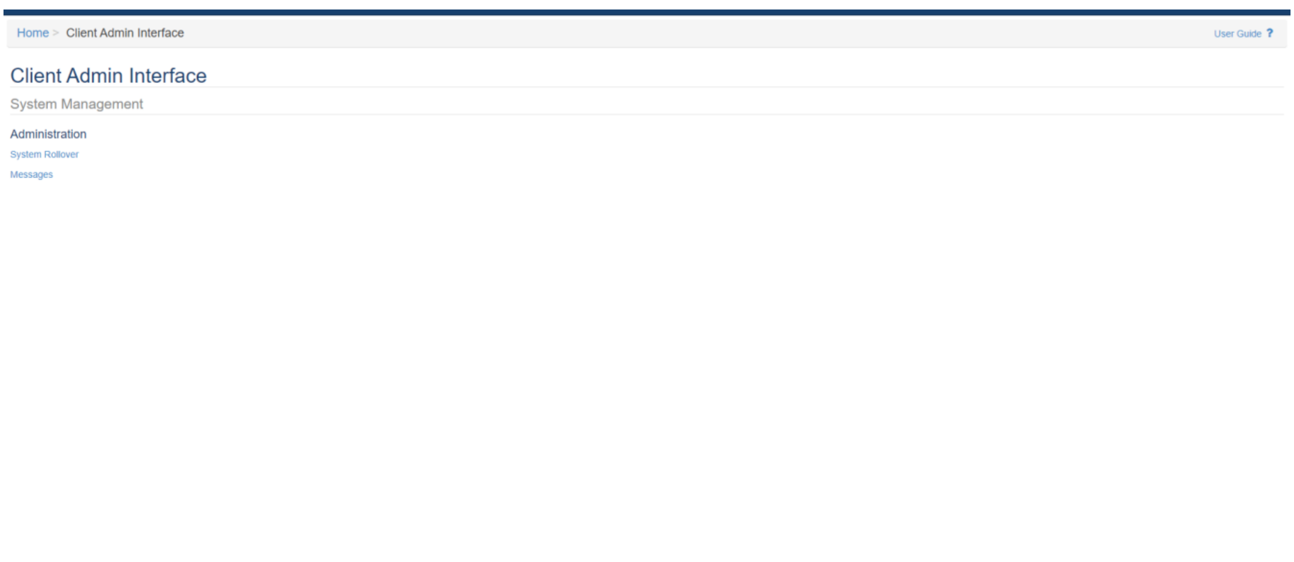


13.6 Client Admin Interface

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 167 Client Admin Interface



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 168 System Admin Interface