

TransAM

Administrative User

User Guide

prepared for

Orange County Department of Planning (OCDP)

prepared by

Cambridge Systematics, Inc.

user guide

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101 Station Landing, Suite 410
Medford, MA 02155

date

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Table of Contents

1.0	Welcome!	1
1.1	Initial Log In and Password Reset	1
1.2	Ongoing Site Access	2
2.0	Dashboard	3
2.1	Dashboard Elements	3
2.2	Header Menu and Controls	3
3.0	General Features and Tools	5
3.1	Table Controls	5
3.2	Site Filters	5
3.3	Messages	6
3.4	Organizations Filter	7
3.5	Search	8
3.6	User and Organization Options	8
3.7	Notifications	10
3.8	Help	10
4.0	Asset Inventory	13
4.1	Add an Asset	13
4.2	Accessing Existing Assets	15
4.3	Editing or Updating Existing Asset Profile Data	17
4.4	Updating Existing Asset Lifecycle Data	18
4.5	Action Events (Disposition and Transfer Review)	19
4.6	Adding or Updating Assets by Bulk Update	21
4.7	Query	24
4.8	Groups	27
5.0	Maintenance	29
5.1	Performance Restrictions	29
6.0	Policies	33
6.1	Asset Replacement/Rehabilitation Policy	33
6.2	TAM Policy	41
7.0	Funding	51
7.1	Programs	51
7.2	Grants	52

8.0 Reports.....	57
8.1 Inventory Reports.....	57
8.2 Capital Needs Reports.....	59
8.3 System Reports	59
8.4 Planning Reports	60
9.0 Specialized Reports	63
9.1 Asset Fleet Builder.....	63
9.2 NTD Asset Reports.....	66
10.0 Admin Tools.....	69
10.1 Organizations.....	70
10.2 Users	71
10.3 Notices	72
10.4 Online Users	73
10.5 Admin Interface.....	74

List of Figures

Figure 1	Password Reset Request Screen.....	1
Figure 2	Set/Reset Password Screen.....	1
Figure 3	Login Screen.....	2
Figure 4	Dashboard Elements	3
Figure 5	Header Menu	3
Figure 6	Sorting Controls	5
Figure 7	Export Button	5
Figure 8	Table Tools	5
Figure 9	Filter Icon	5
Figure 10	User Profile Messages	6
Figure 11	Messages	6
Figure 12	Message Interface	7
Figure 13	Organization Filter	7
Figure 14	Organization Filter Selections.....	7
Figure 15	Search Box	8
Figure 16	User Menu	8
Figure 17	User Menu Dropdown.....	8
Figure 18	Organization Details	9
Figure 19	Profile Details.....	9
Figure 20	Report an Issue	10
Figure 21	Notification Drawer	10
Figure 22	Help Icon.....	11
Figure 23	Help Content.....	11
Figure 24	Asset Inventory Dropdown	13
Figure 25	Adding an Asset.....	13
Figure 26	Select the Organization and Asset Class	14
Figure 27	Adding Asset Required Details.....	14
Figure 28	Add the Asset and Go To The New Record	15
Figure 29	Existing Assets	16
Figure 30	Existing Asset Interface	16
Figure 31	Asset Record: Highlights	17
Figure 32	Asset Record: Profile and Summary	17
Figure 33	Editing the Profile of an Existing Asset.....	18
Figure 34	Updating the Lifecycle of an Existing Asset	19
Figure 35	Asset Action Events (Disposition and Transfer)	20

Figure 36	Early Disposition Requests.....	20
Figure 37	Bulk Updates	21
Figure 38	Bulk Update Tools	21
Figure 39	Bulk Update Details	22
Figure 40	Bulk Update Spreadsheet Download.....	22
Figure 41	Bulk Update Spreadsheet.....	22
Figure 42	Bulk Update Upload.....	23
Figure 43	Bulk Upload Processing	23
Figure 44	Bulk Update Edit.....	24
Figure 45	Asset Query	24
Figure 46	Column Selection.....	25
Figure 47	Filter Selection	25
Figure 48	Calculate, Export or Save.....	26
Figure 49	Saved Queries	26
Figure 50	Asset Groups	27
Figure 51	Adding an Asset to a Group	27
Figure 52	Asset Inventory Dropdown : Infrastructure - Track.....	29
Figure 53	Existing Asset Interface : Infrastructure - Track	29
Figure 54	Lifecycle Action Menu.....	30
Figure 55	Performance Restriction Lifecycle Event.....	30
Figure 56	Maintenance Dropdown.....	31
Figure 57	Performance Restriction Management.....	31
Figure 58	Policies Dropdown	33
Figure 59	Policy Rule Sets.....	33
Figure 60	Asset Replacement/Rehabilitation Policy	34
Figure 61	Asset Replacement/Rehabilitation Policy Filters	34
Figure 62	Policy Rules	35
Figure 63	Policy Rules Actions Dropdown.....	35
Figure 64	Export rules to Excel (Windows dialog box)	35
Figure 65	Modify (Update) Organization Policy Dialog.....	36
Figure 66	Distribute Policy	36
Figure 67	Copy Organization Policy Dialog	37
Figure 68	Asset Types	37
Figure 69	Additional Assets Dropdown Icon.....	37
Figure 70	Asset Type Rules.....	38
Figure 71	Add an Asset Type Rule Dialog Box	38
Figure 72	Edit Icon.....	38

Figure 73	Modify Asset Policy Rule	39
Figure 74	Asset Type and Asset Subtype rules.....	39
Figure 75	Add an Asset Subtype Rule Icon.....	39
Figure 76	Add an Asset Subtype Rule Dialog	40
Figure 77	Modify Asset Subtype Rule	40
Figure 78	Remove Asset Subtype Rule.....	40
Figure 79	TAM Policy Dropdown Menu Selection	41
Figure 80	TAM Policy Group Management	41
Figure 81	TAM Policy Year	42
Figure 82	Add New TAM Policy Year	42
Figure 83	Group Management Period and Year.....	43
Figure 84	Add Group Button	43
Figure 85	Add TAM Group Dialog	43
Figure 86	Add TAM Group Dialog <i>With Selections</i>	44
Figure 87	Add TAM Group <i>Selections, Asset Categories</i>	44
Figure 88	TAM Group Mangement Status.....	45
Figure 89	TAM Policy Group Metrics.....	45
Figure 90	Editable and Locked Assets	46
Figure 91	Asset Type Percentage Settings	46
Figure 92	Distribute TAM Policy	47
Figure 93	Distributed TAM Policy	47
Figure 94	TAM Policy Performance Measures	48
Figure 95	Policy Year Filters.....	48
Figure 96	Asset Type Percentage Settings	48
Figure 97	Activate Perfomance Measures.....	49
Figure 98	Available Funding Programs	51
Figure 99	Funding Program Details	51
Figure 100	Grants Dropdown.....	52
Figure 101	Adding a Grant.....	52
Figure 102	Adding Required Details (New Grants)	52
Figure 103	Grants Table	53
Figure 104	Accessing an Existing Grant.....	53
Figure 105	Editing or Updating an Existing Grant	54
Figure 106	Managing the Lifecycle of a Grant.....	54
Figure 107	Managing Grant Amendments.....	55
Figure 108	Adding Required Details (Grant Amendments)	55
Figure 109	Reports Dropdown.....	57

Figure 110	Report Exports.....	57
Figure 111	Asset Condition Report.....	57
Figure 112	Asset Age Report.....	58
Figure 113	Asset Funding Source Report	58
Figure 114	Backlog Report	59
Figure 115	User Login Report.....	59
Figure 116	Issues Report.....	60
Figure 117	Revenue Vehicle Replacement Report	60
Figure 118	State of Good Repair Report	61
Figure 119	Disposition Report	61
Figure 120	Asset Service Life Summary Report.....	61
Figure 121	TAM Service Life Summary Report.....	62
Figure 122	Asset Fleet Builder.....	63
Figure 123	Asset Fleet Builder—Orphaned Assets	64
Figure 124	Adding an Orphaned Asset to a Fleet	64
Figure 125	Adding a New Fleet	65
Figure 126	Update Asset Fleet Details.....	65
Figure 127	Update Odometer Readings.....	65
Figure 128	Remove or Add Assets from within a Fleet	66
Figure 129	Access NTD Reports	67
Figure 130	Table of Previously Generated NTD Reports.....	67
Figure 131	Create New Reporting Year Forms	68
Figure 132	NTD Report Details and Data.....	68
Figure 133	Download each NTD Form	68
Figure 134	Admin User and Organization Options	69
Figure 135	Organizations.....	69
Figure 136	Admin User Options.....	70
Figure 137	Admin Organizations	70
Figure 138	Add an Organization	71
Figure 139	Admin Users	71
Figure 140	Add a User	72
Figure 141	Notices	72
Figure 142	Add a Notice	73
Figure 143	Notice on the Dashboard.....	73
Figure 144	Active Users.....	74
Figure 145	Admin Interface.....	74

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

The email address you enter, must match the email address entered when your account was established

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

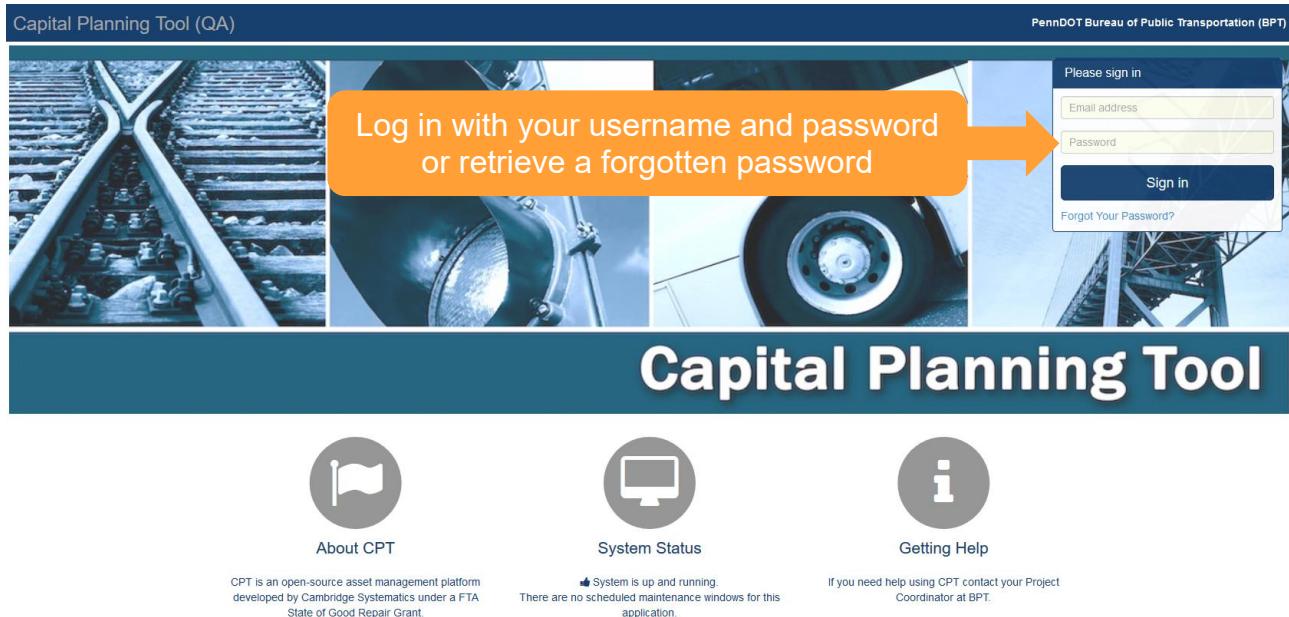
Figure 2 Set/Reset Password Screen

1.2 Ongoing Site Access

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

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

Figure 3 Login Screen



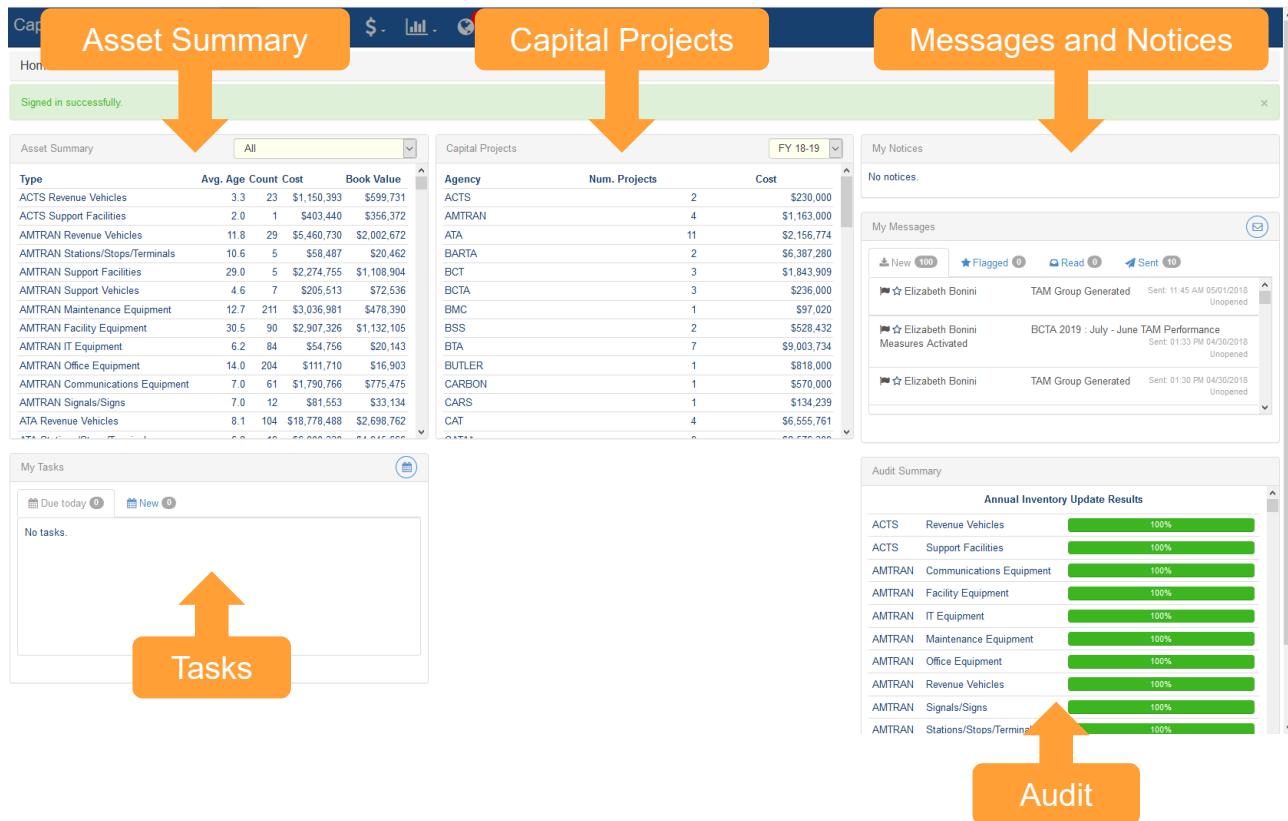
2.0 Dashboard

2.1 Dashboard Elements

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

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

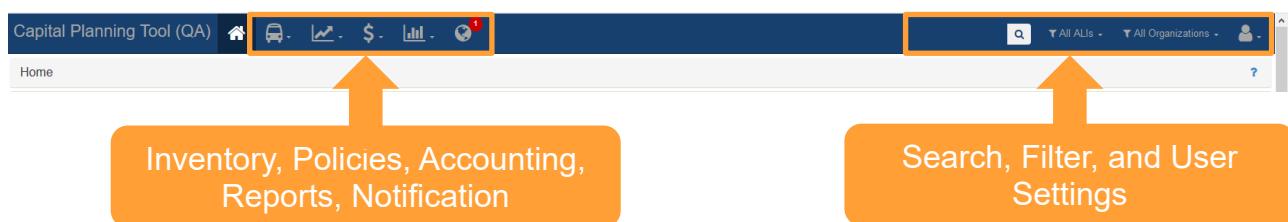
Figure 4 Dashboard Elements



2.2 Header Menu and Controls

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

Figure 5 Header Menu



3.0 General Features and Tools

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

3.1 Table Controls

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

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

Figure 6 Sorting Controls



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

Figure 7 Export Button



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

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

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

Figure 8 Table Tools



3.2 Site Filters

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

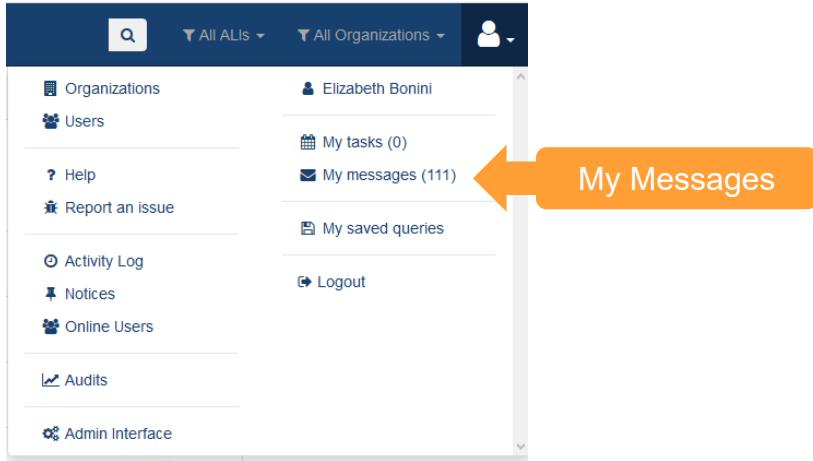
Figure 9 Filter Icon



3.3 Messages

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

**Figure 10 User Profile
Messages**



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

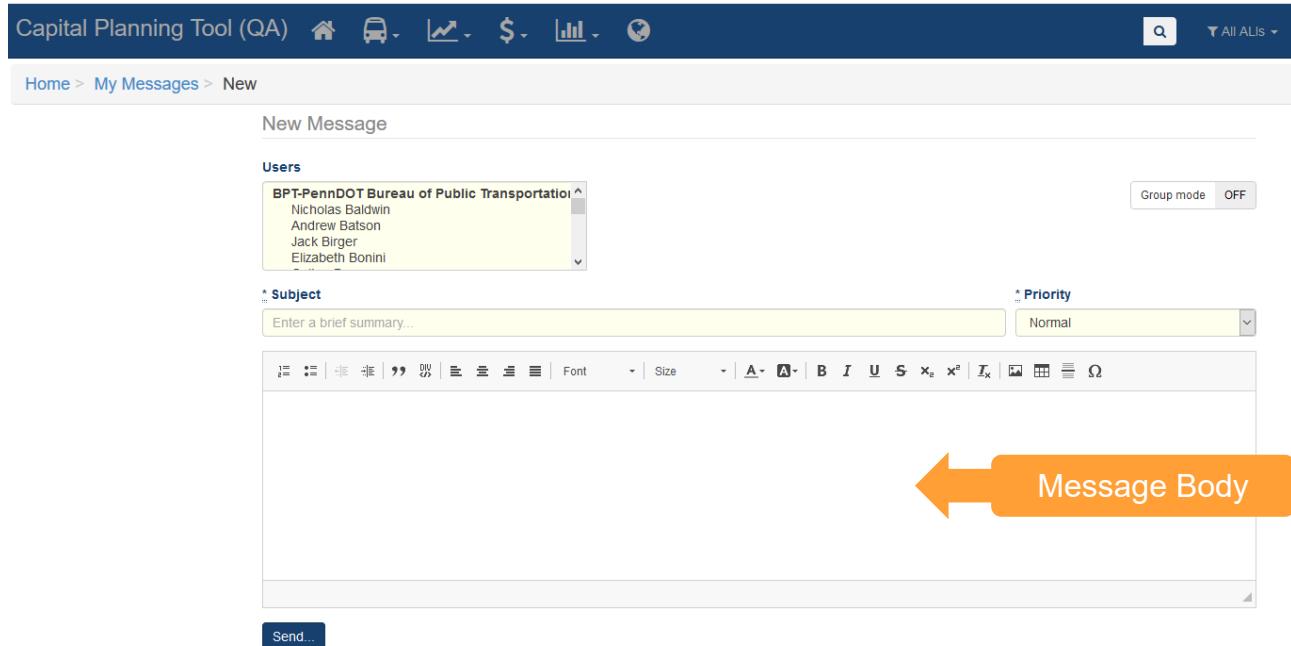
Figure 11 Messages

The screenshot shows the Capital Planning Tool (QA) 'My Messages' page. At the top, there are navigation icons for Home, Bus, Graph, Dollar, Bar, and Mail. Below that is a breadcrumb trail: Home > My Messages. The main area has buttons for Refresh and Compose. It displays a list of messages with columns for recipient, subject, and timestamp. The first message is from 'system user' with subject 'User account locked' sent at 01:51 PM 08/17/2018. The second and third messages are identical, also from 'system user' with subject 'User account locked' sent at 12:22 PM 07/15/2018.

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

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

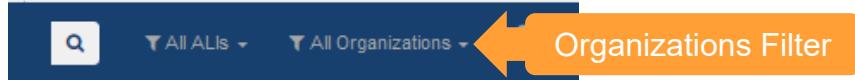
Figure 12 Message Interface



3.4 Organizations Filter

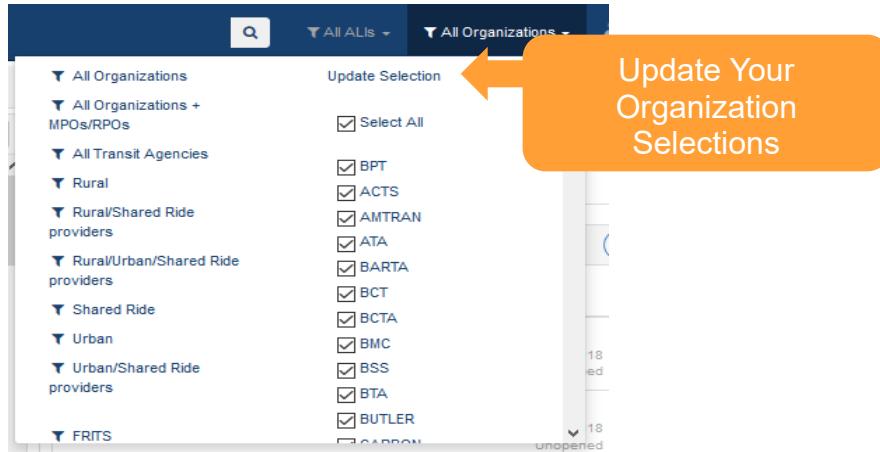
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

Figure 13 Organization Filter



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

Figure 14 Organization Filter Selections



3.5 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 15 Search Box



3.6 User and Organization Options

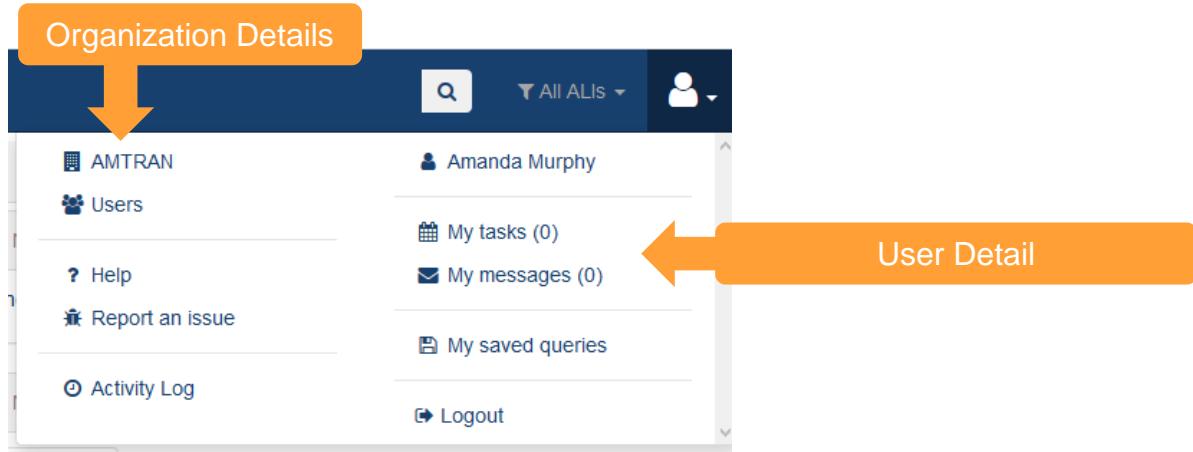
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

Figure 16 User Menu



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

Figure 17 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 18 Organization Details

Capital Planning Tool (QA) Home > Organizations > Transit Operators > AMTRAN

Actions ▾

Type Name: Altona Metro Transit
Short Name: AMTRAN
External ID: 123456789
Address: 3301 Fifth Avenue, Altoona, PA, 16601
Technical Contact: Not Set
Subrecipient Number: XXXXXXXXX

Asset Summary Staff Services Governance Planning Partners NTD Reports Capital Projects Buckets Map

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

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 19 Profile Details

Capital Planning Tool (QA) Home > Users > My Profile

Actions ▾

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

Corporate System Settings

Amanda Murphy

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

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

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 20 Report an Issue

Report an Issue

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

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

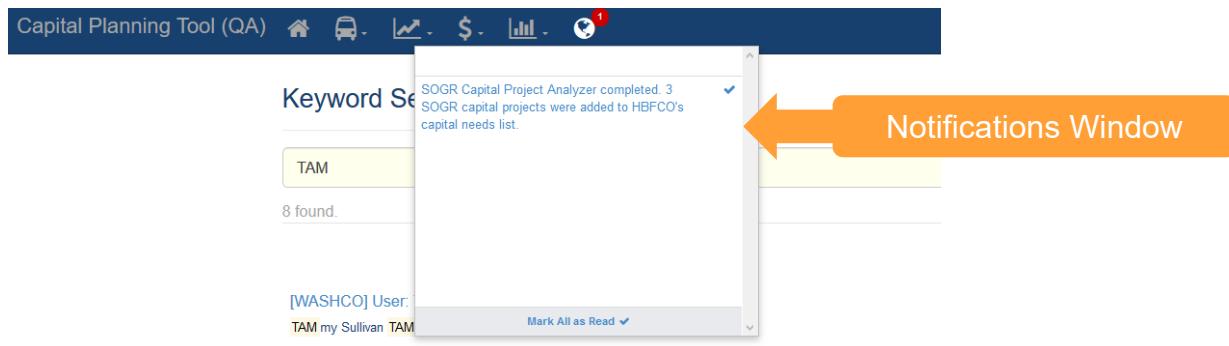
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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

* Issue Type	* Web Browser Type
<input type="text"/>	<input type="text"/>
* Comments	
<input type="text"/> Please provide as much detail as you can...	
<input type="button" value="Create Issue"/>	

3.7 Notifications

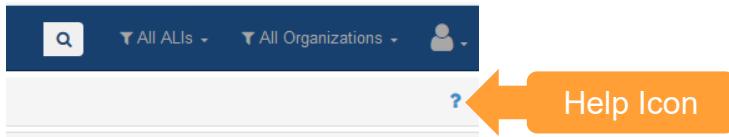
The notifications dropdown alerts you when there's activity in the system that you should be aware of. The globe at the top of the page will display a number with the count of "unread" notifications since your last check. Clicking on a notification item will take you to the change and mark the notification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

Figure 21 Notification Drawer

3.8 Help

At the top right of each page is a "?" icon.

Figure 22 Help Icon



Clicking the help icon will bring you to the help content regarding that page. The help content provides detailed descriptions of each of the page elements. You also can navigate to help content for other pages. Via the contents, index, or search tabs in the left pane.

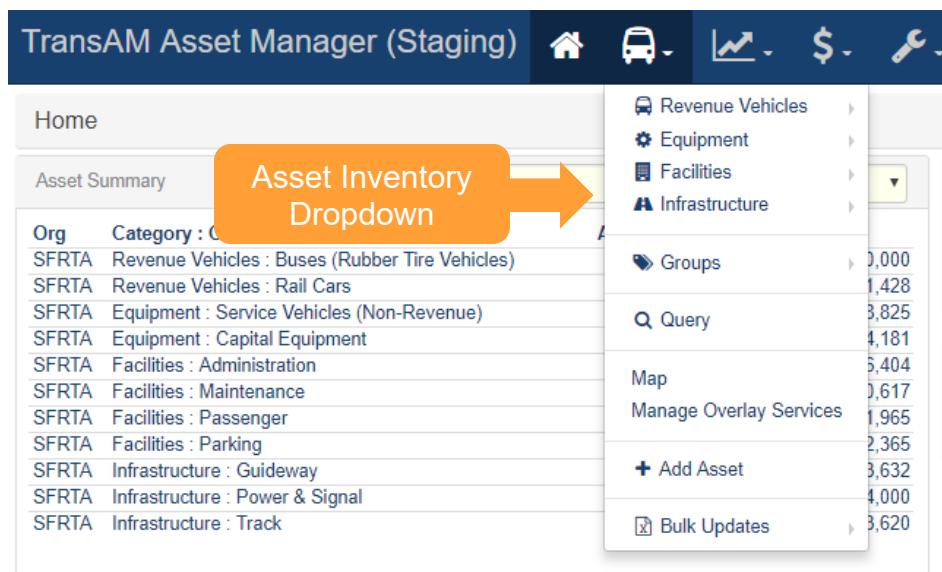
Figure 23 Help Content

A screenshot of the help content for the 'Dashboard' page. On the left is a navigation sidebar with tabs for 'Contents', 'Index', and 'Search'. Below these are several sections: 'Capital Planning Tool Introduction', 'Getting Started', 'Main Menu' (which is expanded to show 'Overview', 'Dashboard', 'Messaging', 'Tasks and Assignments', 'User Settings', and 'Content Area'), 'Assets and Inventory', 'Policy', 'Capital Planning', 'Funding', 'Reporting', 'Admin Functionality', and 'Glossary'. The main content area is titled 'Dashboard Overview'. It contains a brief description of what the dashboard is and lists several widgets: 'My Messages', 'My Tasks', 'My Notes', 'Asset Summary', 'Capital Projects', and 'Audit Summary'. At the bottom of the main content area, it says 'Copyright © 2015 by Cambridge Systematics. All Rights Reserved.'.

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.

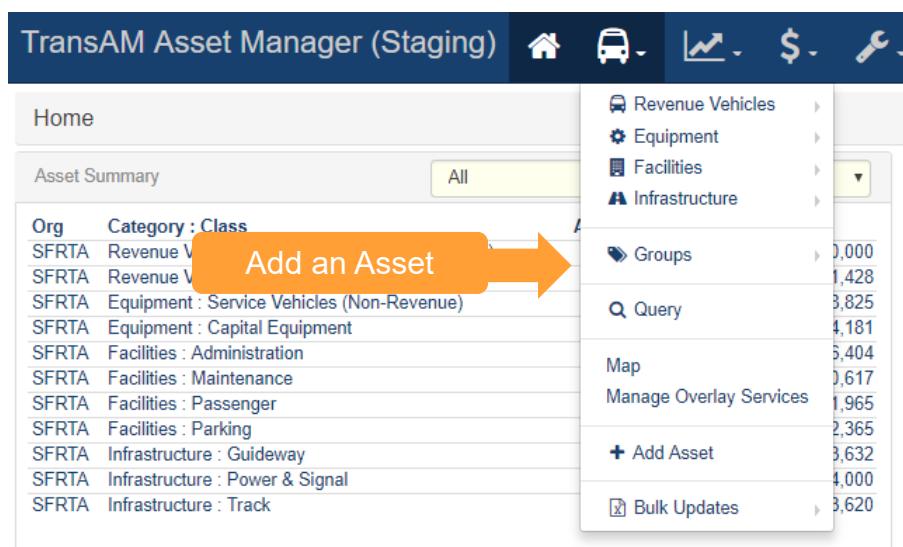
Figure 24 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 25 Adding an Asset



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

Figure 26 Select the Organization and Asset Class

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

Home > Add Asset

New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

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

Figure 27 Adding Asset Required Details

Capital Planning Tool (QA) Home Bus Map \$ Graph Help ? All ALIs ▾ All Organizations ▾

Home

Required Fields Recommended Fields

Organization
* Organization
Altoona Metro Transit

Service Status
* Service Status

Identification & Classification
* Vehicle Identification Number (VIN)
* Asset ID
* Class
Buses (Rubber Tire Vehicles)
* Type
* Subtype
* Estimated Service Life (ESL) Category

Characteristics
* Manufacturer
Manufacturer (Other)
* Model
Model (Other)
* Year of Manufacture
* Fuel Type
Fuel Type (Other)
Dual Fuel Type
* Length
Length Units
* Seating Capacity (ambulatory)

Any field on the required tab must be filled out

Figure 28 Add the Asset and Go To The New Record

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Funding' fields like 'Cost (Purchase)' and 'Funding Type'. On the right, there are 'Operations' fields like 'Seating Capacity (ambulatory)', 'ADA Accessible', 'In Service Date', 'Primary Mode', and 'Service Type (Primary Mode)'. At the bottom left, there's a button labeled '+ Add Asset & Go to New Record'. An orange callout bubble with an arrow points to this button, containing the text 'Add Asset and Go To New Record Button'.

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 29 Existing Assets

Click Asset Class to access a list of assets

Type	Avg. Age	Due Date	Agency	Num. Projects
ACTS Revenue Vehicles	2.3	2018-06-01	ACTS	5,793
ACTS Support Facilities	2.0	2018-06-01	AMTRAN	7,751
ACTS Guideway	0.0	2018-06-01	ATA	\$0
ACTS Power & Signal	0.0	2018-06-01	BARTA	\$0
ACTS Track	0.0	2018-06-01	BCT	\$0
AMTRAN Revenue Vehicles	12.0	2018-06-01	BCTA	2,076
AMTRAN Stations/Stops/Terminals	11.0	2018-06-01	BMC	0,465
AMTRAN Support Facilities	29.4	2018-06-01	BSS	3,902
AMTRAN Support Vehicles	4.9	2018-06-01	BTA	2,534
AMTRAN Maintenance Equipment	12.9	2018-06-01	BUTLER	9,698
AMTRAN Facility Equipment	30.2	2018-06-01	CARBON	7,301
AMTRAN IT Equipment	6.6	2018-06-01	CARS	\$20,278
AMTRAN Office Equipment	14.1	2018-06-01	CAT	\$112,098
AMTRAN Communications Equipment	7.5	2018-06-01	CATA*	\$17,292
AMTRAN Signals/Signs	6.8	2018-06-01	CCTA	\$1,790,766
AMTRAN Guideway	0.0	2018-06-01	CHESSR	\$775,479
AMTRAN Power & Signal	0.0	2018-06-01	CLARCO	\$34,504
AMTRAN Track	0.0	2018-06-01	CNTRCO	\$0

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

Figure 30 Existing Asset Interface

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GBB2713H3189913	GIL - Gillig Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFE4FS6HDC19987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4FS8HDC16988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4FSXHDC19992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4FS6HDC19990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4FS8HDC19991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4FSXHDC19989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4FS1HDC19993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4FS3HDC19994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4FS5HDC19995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4FS7HDC19996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFE4FS9HDC19997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFE4FS0HDC19998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#800	LCTA	15GBB311J3190014	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	15GBB311J3190015	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
*001	LCTA	1FDFE4FS8GDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*002	LCTA	1FDFE4FSXGDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GCB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GCB201731111860	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GCB201031111880	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GCB201431111896	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F185793	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

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 31 Asset Record: Highlights

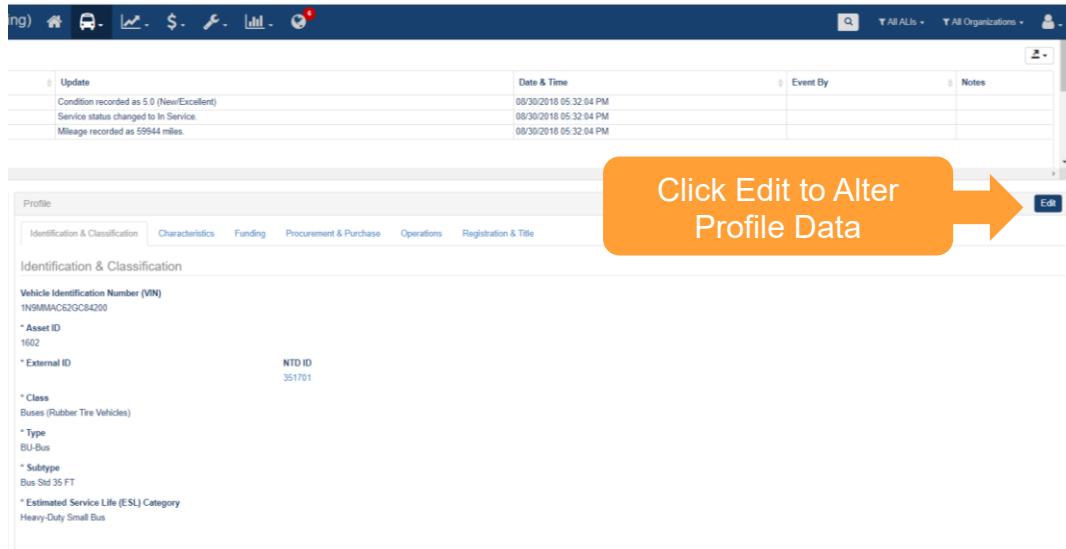
Event	Date	Update	Notes
Condition	2/26/2018	Condition recorded as 5.0 (New/Excellent)	
Service Status Update	2/26/2018	Service status changed to In Service.	

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

Figure 32 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.

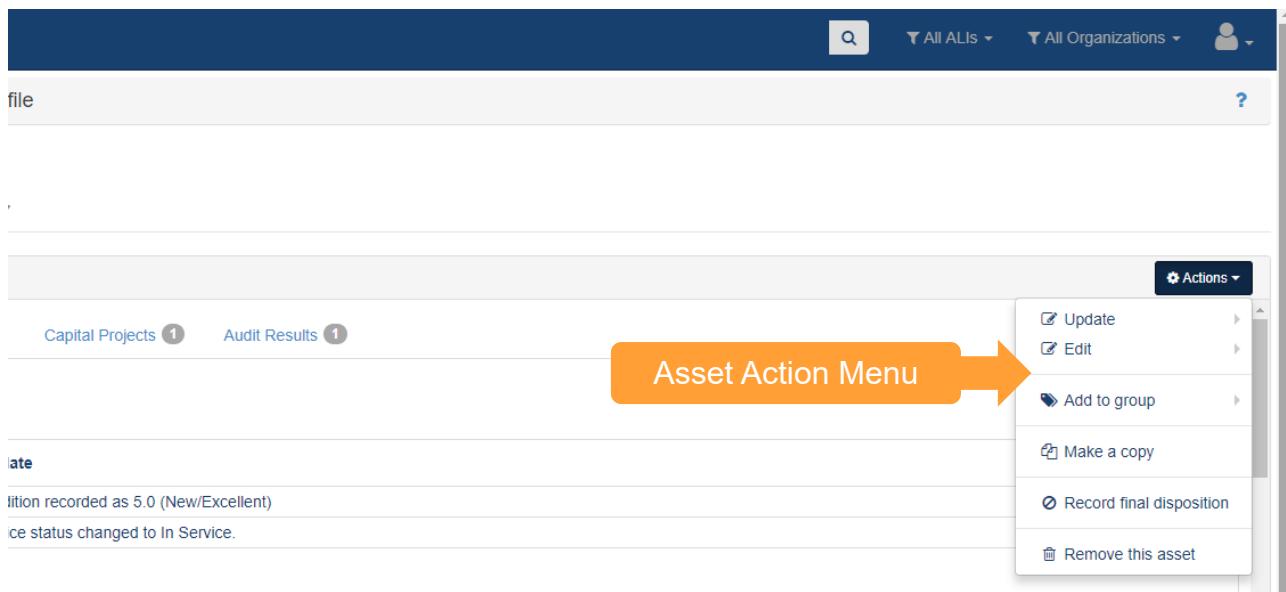
Figure 33 Editing the Profile of an Existing Asset

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 34 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 35 Asset Action Events (Disposition and Transfer)

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The main area displays a table of assets with columns for Type, Avg. Age, and various metrics. A modal window titled 'Action Events' is open, showing two options: 'Early Disposition Proposed' and 'Newly Transferred Assets'. An orange arrow points from the text 'Action Events Menu' to this modal. To the right of the table, there's a 'Capital Projects' section with a table showing projects by Agency (ACTS, AMTRAN), Num. Projects, and Cost. Below that is a 'My Notices' section with a table of notices. At the bottom, there's a 'My Tasks' section and an 'Audit Summary' section with a chart titled 'Annual Inventory Update Results' showing completion percentages for different asset types across agencies.

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

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

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

Figure 36 Early Disposition Requests

The screenshot shows the Capital Planning Tool (QA) interface with the title 'Home > Early disposition proposed'. At the top, there are buttons for 'Export All', 'Approve', and 'Reject'. An orange arrow points from the text 'Approve or Reject requests' to the 'Approve' button. Below is a table listing early disposition requests. The columns include checkboxes, star icons, Agency (RTTA, BARTA, YCTA), Type (Bus Maintenance Equipment, Bus Std 35 FT, Bus < 30 FT), Asset Tag (2314, 0409, 5010), Description (BUS LIFTS-LORISER IN-GROUND HYDRAULIC LIFT, CCI Opus 34 LF, CMC Challenger), Parent (empty), Location (empty), Status (O), and Age (13, 14, 1). The 'Approve' button is highlighted with a red border.

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 37 Bulk Updates

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary'. Below 'Asset Summary' is a table with columns 'Type' and 'Avg. Age'. The table lists various asset types like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc., with their average ages. To the right of the table is a sidebar titled 'Capital Projects' which lists agencies such as ACTS, AMTRAN, ATA, BARTA, BCT, BCTA, BMC, BSS, BTA, CAT, CATA*, CCTA, CHESSR, and CLARCO. In the center, there's a main content area with a 'Bulk Updates' button highlighted by an orange arrow and a callout box labeled '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 38 Bulk Update Tools

The screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' (highlighted with an orange arrow), 'Upload a Template', and 'Filter Status'. Below these are two tabs: 'Agency' and 'File Name'. The main table lists bulk update entries with columns: Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The table includes entries for PIKECO, END, and WBT, each with a different file name and processing statistics. A callout box labeled 'Bulk Update Tools' covers the middle part of the table.

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 39 Bulk Update Details

Capital Planning Tool (QA)

Home > Bulk Updates > Download Template

Bulk Update Templates

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

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

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

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

Select Template and Asset Type

Template Type: Inventory Updates

Organization:

Fta Asset Class:

Create template

Choose these parameters

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

Figure 40 Bulk Update Spreadsheet Download

Capital Planning Tool (QA)

Home > Bulk Updates > Download Template

Success

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

Download File

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

Figure 41 Bulk Update Spreadsheet

Asset	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Object Key	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep.
3_A2E18C2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN08YYU020684	In Service	01/23/2018		1.00	01	
4_A2E18C2NDFDG6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN07DXYU020685	In Service	01/23/2018		1.00	01	
5_A2E18C3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018		1.00	01	
6_A2E18C474G4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090105	In Service	01/23/2018		1.00	01	
7_A2E18C474MF4E	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090106	In Service	01/23/2018		2.00	01	
8_A2E18C565B2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090107	In Service	01/23/2018		2.00	01	
9_A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291451090108	In Service	01/23/2018		2.00	01	
10_A2E18C695LBR	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291651090109	In Service	01/23/2018		2.00	01	
11_A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090110	In Service	01/23/2018		2.00	01	
12_A2E18C800038	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091596	In Service	01/23/2018		2.00	01	
13_A2E18C817G03	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271081091596	In Service	01/23/2018		2.00	01	
14_A2E18C893ISGC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091597	In Service	01/23/2018		2.00	01	
15_A2E18C935EM0	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271381091598	In Service	01/23/2018		2.00	01	
16_A2E18CAAA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018		2.00	01	
17_A2E18CB0HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091599	In Service	01/23/2018		2.00	01	
18_A2E18CBEMXK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271481091599	In Service	01/23/2018		2.00	01	
19_A2E18CG4N614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018		2.00	01	
20_A2E18CLC0KL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091652	In Service	01/23/2018		2.00	01	
21_A2E18GD897DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271091091653	In Service	01/23/2018		2.00	01	
22_A2E18GE07EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271291091654	In Service	01/23/2018		2.00	01	
23_A2E18GF3ECK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271491091655	In Service	01/23/2018		2.00	01	
24_A2E18GF54C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271791091656	In Service	01/23/2018		2.00	01	
25_A2E18GFNSG4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091657	In Service	01/23/2018		2.00	01	
26_A2E18GG0K040	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091658	In Service	01/23/2018		2.00	01	
27_A2E18GGG3JG	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091659	In Service	01/23/2018		2.00	01	
28_A2E18GHBAIB0	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091660	In Service	01/23/2018		2.00	01	
29_A2E18GHKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091661	In Service	01/23/2018		2.00	01	
30_A2E18GA178K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091662	In Service	01/23/2018		2.00	01	
31_A2E18GIN06GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29165111645	In Service	01/23/2018		2.00	01	
32_A2E18GUFCK1	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291851111646	In Service	01/23/2018		2.00	01	
33_A2E18GK1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X51111647	In Service	01/23/2018		2.00	01	
34_A2E18GLC4A	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291511111648	In Service	01/23/2018		2.00	01	
35_A2E18GL48C4	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079888	In Service	01/23/2018		2.00	01	
36_A2E18GLUHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271191079889	In Service	01/23/2018		2.00	01	
37_A2E18GMNPW4	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGR271841178187	In Service	01/23/2018		2.00	01	

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

Figure 42 Bulk Update Upload

The screenshot shows the 'Bulk Updates' section of the Capital Planning Tool. On the left, there's a sidebar with 'Bulk Updates' selected. The main area has a 'Spreadsheet' tab active. Under 'Spreadsheet Content', 'Inventory Updates' is selected. Under 'Organization', 'CATA*-Centre Area Transportation Authority' is chosen. A large orange callout box with an upward arrow points to the 'Upload spreadsheet' button, which is highlighted in blue. The callout box contains the text: 'Select the parameters again and upload spreadsheet'.

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 43 Bulk Upload Processing

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

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

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

Figure 44 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.

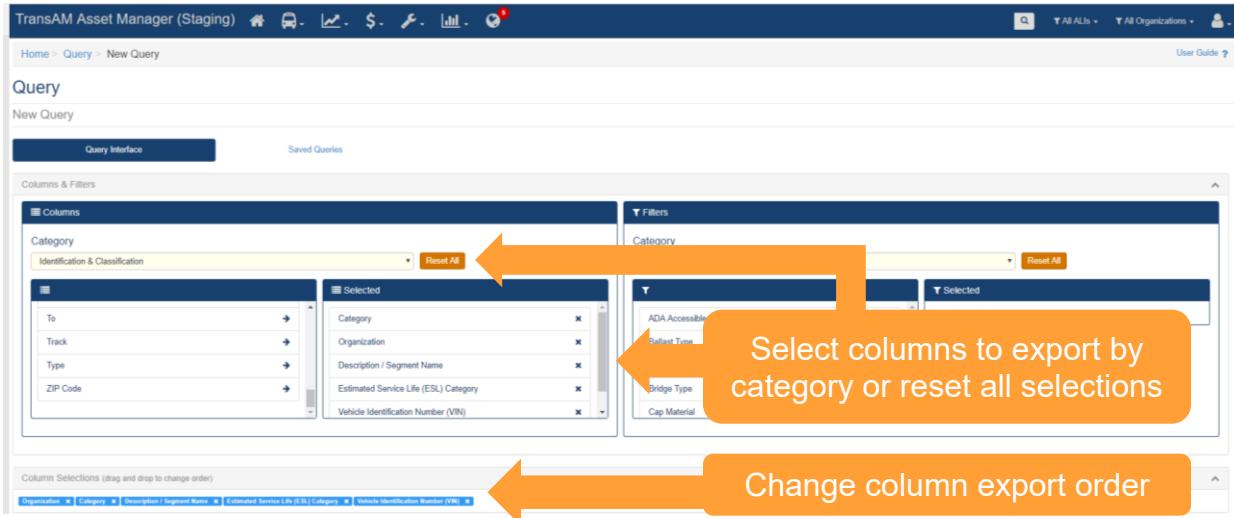
Figure 45 Asset Query

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

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

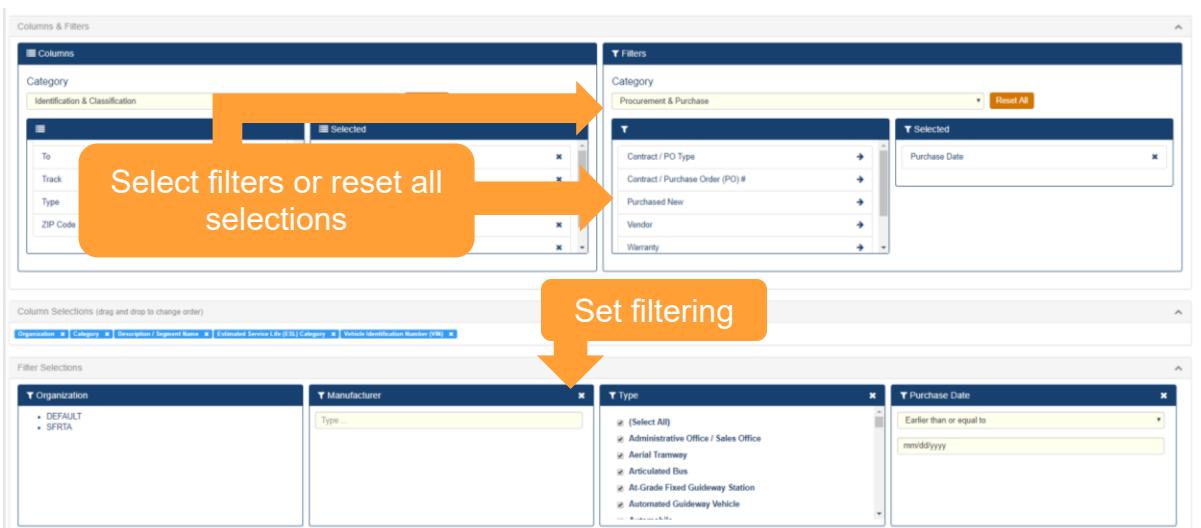
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

Figure 46 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.

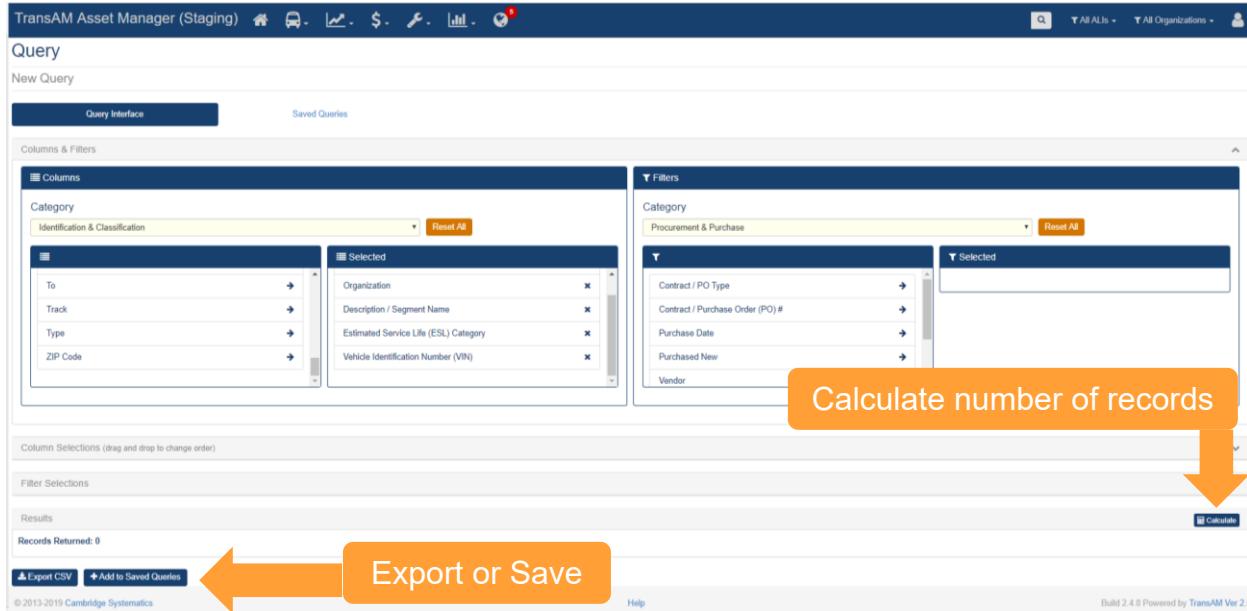
Figure 47 Filter Selection



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 48 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 49 Saved Queries

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

4.8 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 50 Asset Groups

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The 'Asset Summary' section lists various asset types with their average age. On the right, a navigation bar includes icons for Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Map, Add Asset, Bulk Updates, Manage Overlay Services, and Manage Groups. A context menu is open over the 'Groups' icon, listing items like 'buses that are 35ft in length', 'Fleet Plan Audit', 'Cumberland County', 'Maintenance Facility', 'Franklin County', 'Union-Snyder Counties', 'Columbia County', 'Montour County', 'Perry County', and 'Disposal to Be Finalized'. An orange arrow points from the text 'Groups' to this context menu.

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

Figure 51 Adding an Asset to a Group

The screenshot shows the Revenue Vehicle Profile page. At the top, it says 'Revenue Vehicle Profile' and 'CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017'. Below this is a 'Highlights' section with tabs for History, Tasks, Comments, Documents, Photos, Charts, Asset Values, Capital Projects, and Audit Results. The 'Actions' dropdown menu is open, showing options like 'Update', 'Edit', 'Add to group', 'Make a copy', 'Record final disposition', and 'Remove this asset'. An orange arrow points from the text 'Add an Asset to a Group' to the 'Add to group' option in the menu. The main content area shows an 'Event' table with rows for Condition and Service Status Update, and a 'Profile' section with tabs for Identification & Classification, Characteristics, Funding, Procurement & Purchase, Operations, and Registration & Title. The 'Identification & Classification' tab is selected, showing fields for Vehicle Identification Number (VIN), Asset ID, External ID, and NTD ID.

5.0 Maintenance

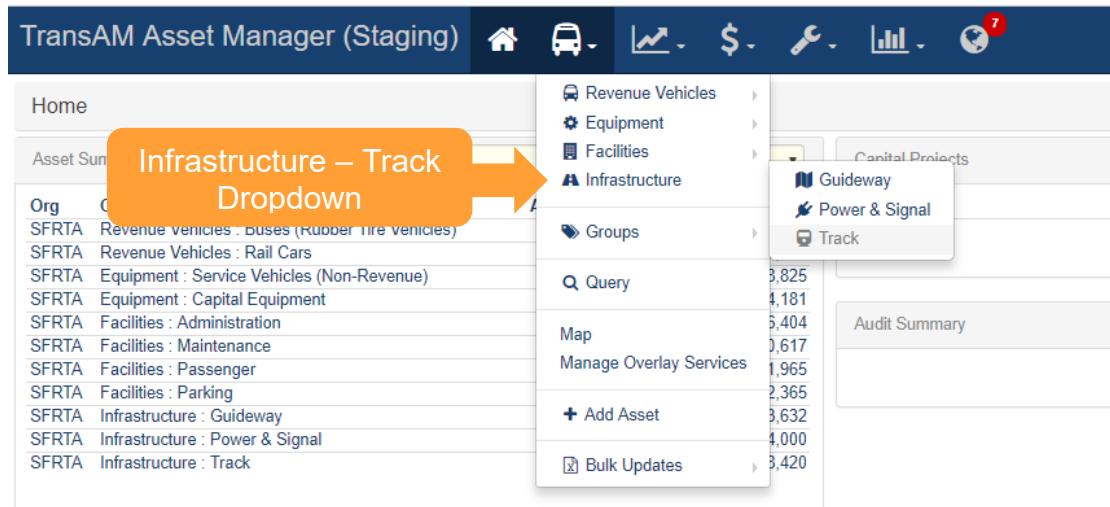
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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 52 Asset Inventory Dropdown : Infrastructure - Track



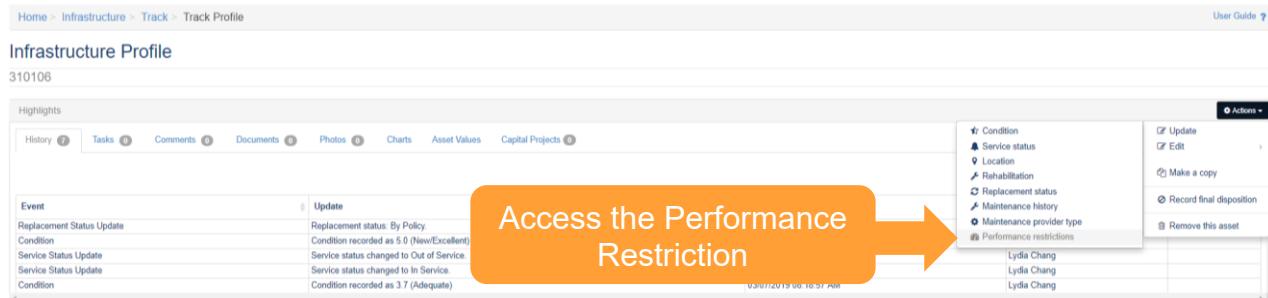
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 53 Existing Asset Interface : Infrastructure - Track

The screenshot shows the Existing Asset Interface for Infrastructure - Track. At the top, there's a header with 'All Track'. Below it is a table with columns: Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. The table contains several rows of data. An orange callout bubble points to the 'Asset ID' column, with the text 'Access the Infrastructure – Track Record' inside it. At the bottom of the table, there's a footer with 'Showing 1 to 10 of 275 rows' and '10 rows per page'.

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

Figure 54 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 55 Performance Restriction Lifecycle Event

Performance restrictions		Notes	
* Speed Restriction	* Unit	* Period	Performance Restriction Events should be utilized to report any speed-based performance restrictions on a single track within the right-of-way. While reporting is initiated per individual track segment, the linear reference markers can be modified to report the restriction across a larger segment of individual track. For users creating the National Transit Database Performance Report (A-90), these performance restrictions will be used to calculate performance against your annual Infrastructure Performance Target (weather restrictions will be excluded).
79.0	mph	<input type="radio"/> Set Length <input checked="" type="radio"/> Until Removed	
* Segment Unit		Track 2	
* Marker Posts			
<input type="radio"/> Lat / Long <input type="radio"/> Chaining			
* Line	* From	* Line	* To
SX	971.9	SX	975.3
* Unit		mile	
From (Location Name)		To (Location Name)	
<input type="text"/>		<input type="text"/>	
Associated Linear Asset Records			
310107	310108	310109	310110
* Restriction Cause			
<input type="text"/>			
* Date of Performance Restriction			
03/14/2019 07:13:32 PM			
Comments			
<input type="text"/>			
<input type="button" value="Update Performance Restrictions"/>			

Submit the Performance Restriction

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 56 Maintenance Dropdown

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Assets, Reports, and Help. Below the navigation bar, a dropdown menu is open, labeled "Maintenance Dropdown". The menu contains several options: "Performance Restrictions", "Capital Projects", "Audit Summary", and "No active audits found". To the left of the dropdown, there is a table titled "Asset Summary" with columns for Org, Category : Class, Avg. Age, Count, and Cost. The table lists various asset categories and their statistics. On the right side of the screen, there are two boxes: "Capital Projects" and "Audit Summary". The "Capital Projects" box shows a count of 2 projects with a total cost of \$10,866,624. The "Audit Summary" box indicates "No active audits found".

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

Figure 57 Performance Restriction Management

The screenshot shows a table titled "Performance Restrictions" with the subtitle "Active Restrictions". The table has a header row with columns for Status, Active Start, Active End, and other details. The main body of the table contains 7 rows of data, each representing a performance restriction. The columns include Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. The "Status" column for all rows shows "Active". The "Comments" column for the first four rows shows a "Closeout" button, while the last three rows show a "Closeout" button with a red border. The table is paginated at the bottom with the text "Showing 1 to 7 of 7 rows".

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 58 Policies Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Money, and Reports. Below the navigation bar is a main content area divided into two sections: 'Asset Summary' on the left and 'Policies' on the right. The 'Policies' section is highlighted with an orange arrow and contains a submenu with options: Capital Projects, Project Planner, and SOGR Capital Project Analyzer. A large orange callout bubble points to the 'Policies' option in the submenu. Below the submenu is a table titled 'Capital Projects' with columns for Agency, Num. Projects, and Cost. The table lists various organizations with their respective project counts and costs.

Agency	Num. Projects	Cost
ACTS	2	\$85,768
AMTRAN	5	\$1,287,100
ATA	11	\$2,156,774
BARTA	2	\$8,142,424
BCT	3	\$1,843,909
BCTA	3	\$236,000
BMC	1	\$97,020
BSS	2	\$528,432
BTA	7	\$9,003,734
BUTLER	1	\$100,000
CARBON	1	\$570,000
CARS	1	\$134,239
CAT	4	\$6,555,761

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 59 Policy Rule Sets

The screenshot shows the Capital Planning Tool (QA) interface with the 'Policies' section selected. The main content area displays two policy rule sets: 'Asset Replacement/Rehabilitation ...' and 'TAM Policy'. An orange arrow points to the 'TAM Policy' section, which is highlighted with an orange callout bubble. Both sections include a small icon and the policy name.

6.1 Asset Replacement/Rehabilitation Policy

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

Figure 60 Asset Replacement/Rehabilitation Policy

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. Below this is a table titled 'Asset Summary' showing data for various asset types like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc. To the right, a list of organizations is shown with their respective counts and book values. An orange callout bubble points to a button labeled 'Asset Replacement/Rehabilitation Selection'.

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 61 Asset Replacement/Rehabilitation Policy Filters

This screenshot shows the 'Asset Replacement/Rehabilitation Policy' filters page. It includes a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. The main area displays policy details for 'BPT-PennDOT Bureau of Public Transportation' under 'FY 2017 Statewide Transit Policy (Current)'. The 'Filters' section contains dropdowns for 'Organization' (set to 'BPT-PennDOT Bureau of Public Transportation') and 'Policy Year' (set to 'FY 2017 Statewide Transit Policy'). Orange arrows point from labels 'Organization Filter' and 'Policy Year' to these dropdowns. The bottom part of the screen shows a table of policy rules with columns for Service Life Calculation Method, Repl. Cost Calculation Method, Condition Rollup Calculation Method, Annual Inflation Rate, Pct Residual Value, and Last Updated.

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 62 Policy Rules

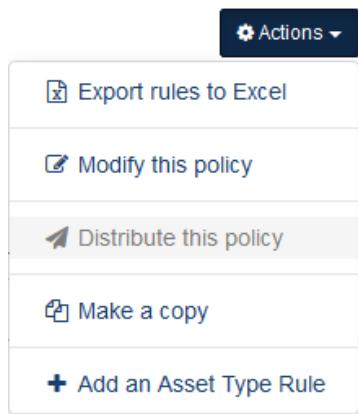
The screenshot shows the 'Policy Rules' page with the following details:

- Policy Owner:** PennDOT Bureau of Public Transportation
- Description:** FY 2017 Statewide Transit Policy
- Status:** Active
- Service Life Calculation Method:** Age and Mileage
- Repl. Cost Calculation Method:** Purchase Price + Interest
- Condition Rollup Calculation Method:** Weighted Average
- Annual Inflation Rate:** 1.10
- Pct Residual Value:** 0%
- Last Updated:** 10:58 AM 02/07/2017

An orange arrow points to the 'Actions' button in the top right corner.

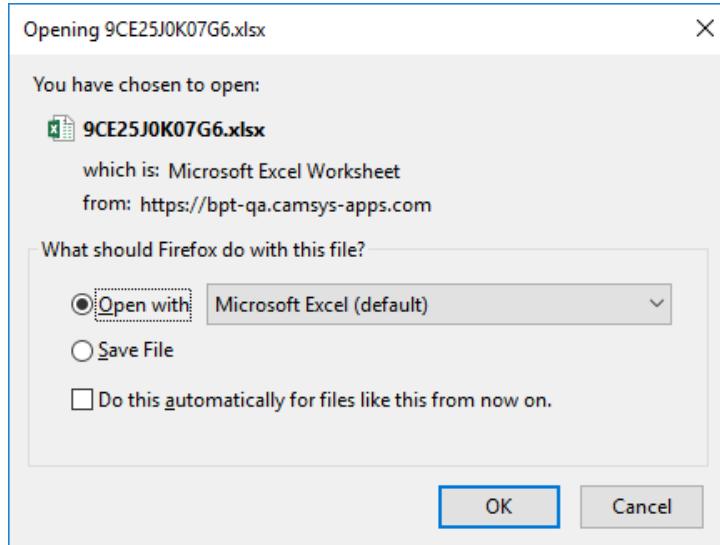
The Actions button will display a list of options as shown.

Figure 63 Policy Rules Actions Dropdown



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

Figure 64 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 65 Modify (Update) Organization Policy Dialog

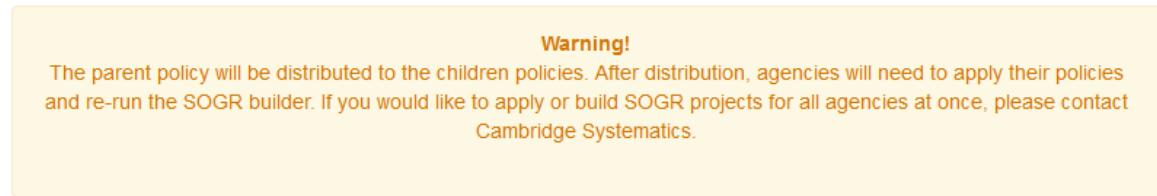
Update Policy

The screenshot shows a 'Update Policy' dialog box. At the top is a header 'Update Policy'. Below it are four input fields: 'Description' containing 'FY 2017 Statewide Transit Policy', 'Condition Threshold' containing '2.5', 'Depreciation Calculator' containing 'Straight Line', and 'Depreciation Interval' containing 'Annually'. At the bottom is a blue 'Update Policy' button.

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 66 Distribute Policy

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 67 Copy Organization Policy Dialog

Update Policy

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

* **Condition Threshold**
2.5

* **Depreciation Calculator**
Straight Line

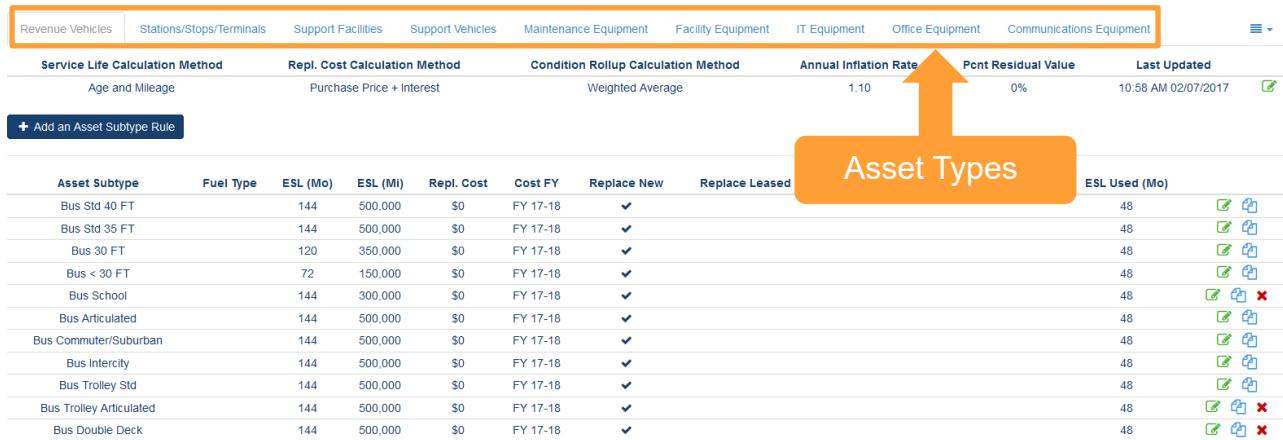
* **Depreciation Interval**
Annually

Create Policy

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

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

Figure 68 Asset Types



The screenshot shows a table of asset subtypes under the 'Asset Types' tab. The table has columns for Asset Subtype, Fuel Type, ESL (Mo), ESL (Mi), Repl. Cost, Cost FY, Replace New, Replace Leased, and ESL Used (Mo). An orange callout points to the 'Asset Types' tab at the top of the table.

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

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

Figure 69 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 70 Asset Type Rules

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

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

Figure 71 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

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

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

Figure 72 Edit Icon



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

Figure 73 Modify Asset Policy Rule

Modify Rule: IT Equipment

* Service Life Calculation Type	* Replacement Cost Calculation Type	Condition Rollup Calculation Type
Age Only	Purchase Price + Interest	Weighted Average
* Annual Inflation Rate		* Pcnt Residual Value
1.1		0
		* Condition Rollup Weight
		0
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

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 74 Asset Type and Asset Subtype rules

Asset Subtype Rules										
Service Life Calculation Method		Repl. Cost Calculation Method		Condition Rollup Calculation Method		Annual Inflation Rate	Pcnt Residual	Last Updated		
Age and Mileage		Purchase Price + Interest		Weighted Average		1.10	0%	10:41 AM 09/10/2016		
Asset Subtype	Fuel Type	ESL (Mo)	ESL (M)	Repl. Cost	Cost FY	Replace New	Replace Leased	Replace With	Replace Fuel Type	ESL Used (Mo)
Bus Std 35 FT	DF	144	500,000	\$0	FY 17-18	✓				48
Bus Std 35 FT	BD	144	500,000	\$0	FY 17-18	✓				48
Bus Std 35 FT	HD	144	500,000	\$0	FY 17-18	✓				48
Bus 30 FT	DF	120	350,000	\$0	FY 17-18	✓				48
Bus < 30 FT	DF	60	150,000	\$0	FY 17-18	✓				48

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

Figure 75 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 76 Add an Asset Subtype Rule Dialog

Add an Asset Subtype Rule

Replacement

Asset Subtype
New Subtype

New Asset Subtype Name

New Asset Subtype Description

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

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

Replace Asset Subtype Replace Fuel Type

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

* Engineering Design Code * Rehabilitation Code

Save **Cancel**

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

Figure 77 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade

Replacement

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

* ESL Used (Mo) Lease Length Months
0 0

* Purchase Replacement Code * Lease Replacement Code
12.22.06 12.26.06

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

Save **Cancel**

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

Figure 78 Remove Asset Subtype Rule

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

Cancel **Yes**

6.2 TAM Policy

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

Figure 79 TAM Policy Dropdown Menu Selection

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Dollar Sign, and a globe. Below the navigation bar is a table titled "Asset Summary" with columns for Type, Avg. Age, Count, Cost, and Book Value. To the right of the table is a sidebar titled "Policies" which includes links for Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. A large orange callout bubble points to the "TAM Policy" link in the sidebar, with the text "TAM Policy Selection" inside it. Further down the page is a table titled "Num. Projects" with columns for Num. Projects and Cost, listing various transit agencies and their respective project counts and costs.

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.

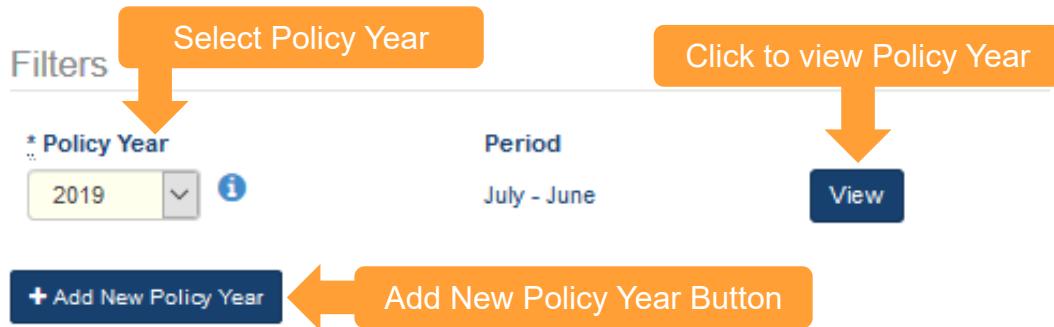
Figure 80 TAM Policy Group Management

The screenshot shows the Capital Planning Tool (QA) interface with the "Policies" tab selected. Under the "Policies" tab, the "TAM Policy" section is active. An orange callout bubble points to the "Group Management" tab, with the text "Group Management tab" inside it. Below the tabs, there is a "Filters" section with a "Policy Year" dropdown set to "2019", a "Period" dropdown set to "July - June", and a "View" button. There is also a "Add New Policy Year" button.

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

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

Figure 81 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 82 Add New TAM Policy Year

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

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

Figure 83 Group Management Period and Year

Group Management : 2019 : July - June



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

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

Figure 84 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 85 Add TAM Group Dialog

TAM Group

Add Group

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

Not Selected

Search...

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

Selected

*** Asset Categories**

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

**Figure 86 Add TAM Group Dialog
With Selections**

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

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 87 Add TAM Group
Selections, Asset Categories**

The screenshot shows the 'Add TAM Group' dialog. It includes fields for 'Name' (My New Group) and 'TAM Group Lead' (Elizabeth Bonini). Below these are 'Not Selected' and 'Selected' organization lists. At the bottom, there is a section for 'Asset Categories' with checkboxes for 'Revenue Vehicles', 'Equipment', and 'Facilities'. An orange callout bubble with the text 'Asset Categories' points to the list of checkboxes.

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 88 TAM Group Mangement Status

Group Management : 2022 : July - June

+ Add Group

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

Generate

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

Figure 89 TAM Policy Group Metrics

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

TAM Policy

Group Management **Group Metrics** Performance Measures

Filters

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

Select Policy Year, Group Name and click View

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

Figure 90 Editable and Locked Assets

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

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

Figure 91 Asset Type Percentage Settings

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

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

Figure 92 Distribute TAM Policy

TAM Policy

Group Management Group Metrics Performance Measures

Filters

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

Group Metrics : 2018 : July - June : New Group

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

Revenue Vehicles

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

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

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

Figure 93 Distributed TAM Policy

Capital Planning Tool (QA) [Home](#) [Bus](#) [Line Graph](#) [Dollar Sign](#) [Bar Graph](#) [Clock](#)

TAM Policy

Group Management Group Metrics Performance Measures

Filters

* Policy Year 2018	Period July - June	View
-----------------------	-----------------------	----------------------

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

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

Group Status

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

Figure 94 TAM Policy Performance Measures

Capital Planning Tool (QA) 🔍 All ALIS ⚙️

Home > Policies > TAM Policy > Performance Measures ?

TAM Policy

Group Management Group Metrics Performance Measures Performance Measures

Filters

* Policy Year 2021	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	View
-----------------------	-----------------------	---------------------------	--	-------------

Performance Measures

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

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

Figure 95 Policy Year Filters

Filters

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

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

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

Figure 96 Asset Type Percentage Settings

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

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

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

Figure 97 Activate Performance Measures

TAM Policy

Group Management	Group Metrics	Performance Measures																									
<p>Filters</p> <table> <tr> <td>* Policy Year 2018</td> <td>Period July - June</td> <td>* Group Name New Group</td> <td>* Organization BCTA-Beaver County Transit Authority</td> <td>View</td> </tr> <tr> <td colspan="5">Performance Measures : 2018 : July - June : New Group : BCTA</td> </tr> <tr> <td>Asset Category Facilities</td> <td>Group Name New Group</td> <td>Agency Status Pending Activation</td> <td colspan="2"> <input type="button" value="Activate"/> <div style="background-color: orange; border-radius: 10px; padding: 5px; display: inline-block;"> Activate Button  </div> </td> </tr> <tr> <td>Asset Class/Type Passenger</td> <td>TERM 3</td> <td>Editable/Locked <input checked="" type="checkbox"/></td> <td>Goal Pcnt 0</td> <td><input type="button" value="Editable"/></td> </tr> <tr> <td>Parking</td> <td>3</td> <td><input checked="" type="checkbox"/></td> <td>0</td> <td><input type="button" value="Editable"/></td> </tr> </table>			* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	View	Performance Measures : 2018 : July - June : New Group : BCTA					Asset Category Facilities	Group Name New Group	Agency Status Pending Activation	<input type="button" value="Activate"/> <div style="background-color: orange; border-radius: 10px; padding: 5px; display: inline-block;"> Activate Button  </div>		Asset Class/Type Passenger	TERM 3	Editable/Locked <input checked="" type="checkbox"/>	Goal Pcnt 0	<input type="button" value="Editable"/>	Parking	3	<input checked="" type="checkbox"/>	0	<input type="button" value="Editable"/>
* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	View																							
Performance Measures : 2018 : July - June : New Group : BCTA																											
Asset Category Facilities	Group Name New Group	Agency Status Pending Activation	<input type="button" value="Activate"/> <div style="background-color: orange; border-radius: 10px; padding: 5px; display: inline-block;"> Activate Button  </div>																								
Asset Class/Type Passenger	TERM 3	Editable/Locked <input checked="" type="checkbox"/>	Goal Pcnt 0	<input type="button" value="Editable"/>																							
Parking	3	<input checked="" type="checkbox"/>	0	<input type="button" value="Editable"/>																							

7.0 Funding

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

7.1 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 98 Available Funding Programs

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area has a title 'Home > Funding Programs > All'. On the left is a table listing 'Funding Programs' with columns for Name, Source, Type, and Status. On the right, there's a detailed view of a selected program, \$5307, showing its type (Federal), formula, inflation rate, and other details like Pct Match (80.000%) and Life of \$ (years) (5). A large orange callout box labeled 'Available Funding Programs' points to a list of programs on the right. An orange arrow points from the 'Add Funding Programs' button at the bottom left towards the central program list.

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 99 Funding Program Details

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area has a title 'Home > Funding Programs > 5307'. On the left is a summary card for program \$5307, showing its type (Federal), formula, inflation rate, and other details like Pct Match (80.000%) and Life of \$ (years) (5). On the right, there's a detailed view of the program with tabs for 'Details', 'Templates' (2), 'Buckets' (21), 'Assets' (827), 'Documents' (0), and 'Comments' (0). A large orange callout box labeled 'Additional Program Information' points to the right-hand panel where details like Templates, Buckets, Assets, Documents, and Comments are listed.

7.2 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, and Local grant information, as well as track funding amounts by each grant for asset purchases. Grants can only be viewed and managed by users with the Grant Manager or Admin privilege.

Figure 100 Grants Dropdown

The screenshot shows the TransAM DRPT (Staging) application. At the top, there is a navigation bar with icons for Home, Asset Summary, Programs, and Grants. A large orange arrow points from the 'Grants' icon in the navigation bar down to a callout box labeled 'Grants Dropdown'. Below this, a table displays asset data categorized by organization (Org) and category/class. The columns include Org, Category : Class, Avg. Age, Count, and Cost. The data shows various assets like Revenue Vehicles, Equipment, and Facilities across different organizations such as RATS, CROSS, RRCSB, PCS, PAA, CVACL, WATA, STJOE, BESH, RAARC, GRAF, ARCPW, NARL, and NARI.

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
NARI	Facilities : Passenger	15.1	8	\$7,788,885

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

Figure 101 Adding a Grant

The screenshot shows the 'Grants' table in the TransAM DRPT (Staging) application. The table lists grants with columns for Grant Number, Source, Program, Grant Year, Owner, Contributor, Legislative Authorization, Date of Award, Date of Most Recent Amendment, Status, Last Update By, and Last Update Date. An orange arrow points from the 'Add a Grant' button at the top right of the table area down to the button itself. The 'Add a Grant' button is located at the top right of the table's data grid.

Grant Number	Source	Program	Grant Year	Owner	Contributor	Legislative Authorization	Date of Award	Date of Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Federal	5311	2018	DRPT	ADCM	MAP-21	12/04/2018	03/07/2019	Open	Lydia Chang	03/07/2019 01:11
State Cap 2019	State	Act 3 BSG	2018	DRPT	Other	2019 Budget	10/01/2018		In Development	Lydia Chang	03/07/2019 01:11
Agency Local Capital	Local	Unknown Program	2018	DRPT	Multiple	Local Capital Funds - 2019	11/07/2018		In Development	Lydia Chang	03/07/2019 01:22

Add a Grant

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 102 Adding Required Details (New Grants)

Home > Grants > New

Add Grant

Details

* Grant Number	
* Source	
* Program	
* Owner	* Contributor
Legislative Authorization	
* Date of Award 03/14/2019 <input type="button" value="Calendar"/>	
Method of Apportionment Structure Single Apportionment	
* Grant Year 2019	
* Total Apportionment \$ 0	
Grant Development Method Directly Generated	
<input type="button" value="+ Add Grant & Go To Grant Details"/> <input type="button" value="Cancel"/>	

Add Grant & Go to Grant Detail Page

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

Figure 103 Grants Table

Home > Grants

Grants

Filtered

Status: In Development / Open

Filter Viewable Grants

Grant Number	Source	Program	Authorization	Date of Award	Date Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Federal	5311	2018 DRPT ADCM MAP-21	12/04/2018	03/07/2019	Open	Lydia Chang	03/07/2019 01 20 PM
State Cap 2019	State	Act 3 BSG	2018 DRPT Other 2019 Budget	10/01/2018		In Development	Lydia Chang	03/07/2019 01 19 PM
Agency Local Capital	Local	Unknown Program	2018 DRPT Multiple Local Capital Funds - 2019	11/07/2018		In Development	Lydia Chang	03/07/2019 01 20 PM

Export Grant Data

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

Figure 104 Accessing an Existing Grant

Home > Grants

Grants

Filtered

Status: In Development / Open

Access an Existing Grant

Grant Number	Source	Program	Authorization	Date of Award	Date Most Recent Amendment	Status	Last Update By	Last Update Date
VA-23-12-2013-01	Source	5311	2018 DRPT ADCM MAP-21	12/04/2018	03/07/2019	Open	Lydia Chang	03/07/2019 01 20 PM
State Cap 2019	State	Act 3 BSG	2018 DRPT Other 2019 Budget	10/01/2018		In Development	Lydia Chang	03/07/2019 01 19 PM
Agency Local Capital	Local	Unknown Program	2018 DRPT Multiple Local Capital Funds - 2019	11/07/2018		In Development	Lydia Chang	03/07/2019 01 20 PM

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

Figure 105 Editing or Updating an Existing Grant

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

Details

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

Click Edit to Alter Profile Data

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 106 Managing the Lifecycle of a Grant

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

Details

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

Change the Status 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 107 Managing Grant Amendments

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

The screenshot shows the 'Amendments' section of the Grant Profile. It includes tabs for Details, Apportionments, Assets, Amendments (which is selected), and History. Below the tabs is a table with one row, showing details for Amendment Number 01. The table columns are: Amendment Number, Grant Number, Comments, Created By, Created Date & Time, and Actions. A large orange arrow points from the left towards the '+Add Amendment' button.

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

Showing 1 to 0 of 0 rows

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

Figure 108 Adding Required Details (Grant Amendments)

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

Add Amendment

* Amendment Number

* Update Grant Number
 Yes
 No

* Grant Number

Comments

8.0 Reports

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

Figure 109 Reports Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there are several icons: a house, a bus, a chart, a dollar sign, and a bar chart. Below these are tabs for 'Home' and 'Asset Summary'. The 'Asset Summary' tab is active, displaying a table with columns: Type, Avg. Age, Count, Cost, and Book. Data rows include ACTS Revenue Vehicles, ACTS Support Facilities, and AMTRAN Revenue Vehicles. To the right of the table is a 'Reports' dropdown menu with options: Reports, Capital Needs Reports, System Reports, Planning Reports, and NTD Reporting. An orange arrow points from the text 'Reports Dropdown' to this menu. A large orange callout bubble also surrounds the 'Reports' option in the 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 110 Report Exports

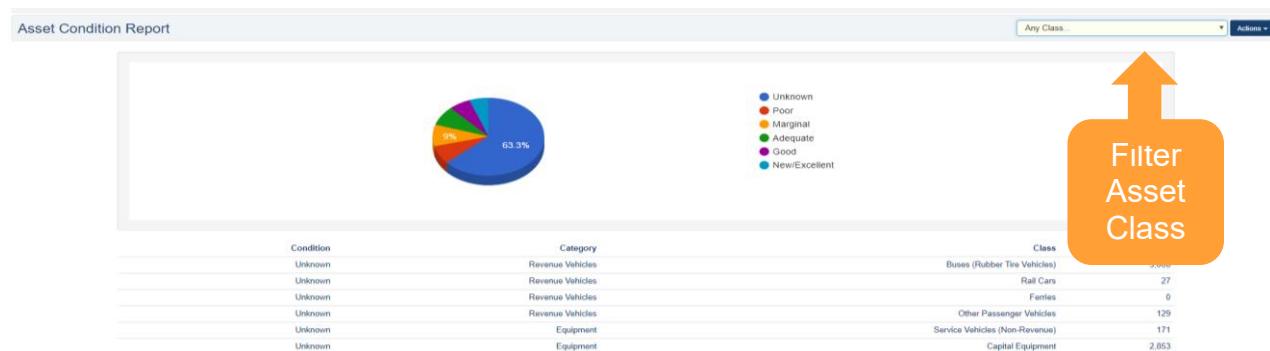
The screenshot shows a report interface with a green 'Actions' button. A dropdown menu is open, listing three options: 'Print to PDF', 'Export as CSV', and 'Export Underlying Data'. An orange callout bubble surrounds the 'Actions' button and the dropdown menu.

8.1 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 111 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 112 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 113 Asset Funding Source Report



8.2 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 114 Backlog Report

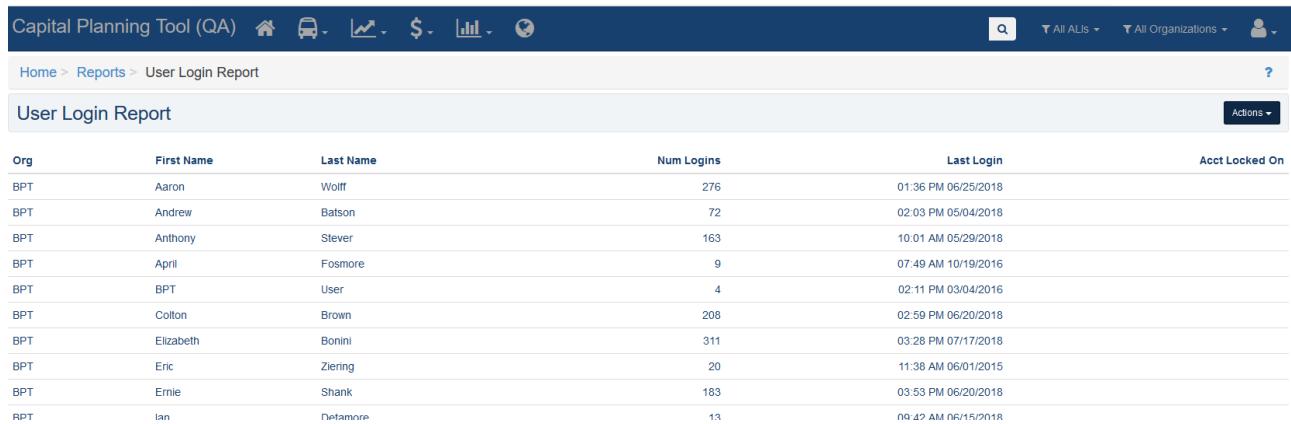


8.3 System Reports

System reports keep track of system-related functional metrics.

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

Figure 115 User Login Report



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

Figure 116 Issues Report

ORGANIZATION	TYPE	DATE/TIME	COMMENTS	BROWSER TYPE	FIRST NAME	LAST NAME	PHONE	ISSUE_STATUS	RESOLUTION_COMMENTS
BPT	Bug	2015-06-10 19:20:41 UTC	When exporting vehicle information from the asset inventory to Excel, fields that have a symbol or check mark are blank in excel. For example, I selected 40ft vehicles and selected/deselected columns. When I exported to Excel, the ADA field (which was displayed as check marks in CPT) is blank for each asset.	Microsoft IE 11	Stephen	Panko	9,999,999,999.00	Open	
BPT	Bug	2015-06-12 16:46:05 UTC	On Wednesday June 10th Dana Moyer from STS reached out to me to request help updating the mileages for all of her vehicles. She said the every month they try to update the mileages for all of her vehicles and so I suggested she do a bulk/mass upload to make it easier. However, when we tried to download an inventory template we both were unable to do this (I ran into the "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	

8.4 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 117 Revenue Vehicle Replacement Report

Revenue Vehicle Replacement Report						
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	\$25,096,859	\$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	\$12,696,894	\$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	\$24,405,851	\$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 118 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	\$11,976,480
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 119 Disposition Report

Disposition Report					
				Jump to...	Actions ▾
All Transit Operators					
Fiscal Year	Category	Class	Sub Type	Count	Book Value
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	9	\$3,138,453
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	1	\$265,314
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	3	\$679,554
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1	\$29,493
FY 18-19	Equipment	Capital Equipment	Other Facilities Equipment	2	\$143
FY 18-19	Equipment	Capital Equipment	Other Communications Equipment	1	\$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 120 Asset Service Life Summary Report

Capital Planning Tool (QA)					
Home > Reports > Asset Service Life Summary Report					
Asset Service Life Summary Report					
Organization	Subtype	Quantity	# Past ESL (Mo.) Pct	# Past ESL (Mi.) Pct	# Past TERM Thresh Pct
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 121 TAM Service Life Summary Report

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

9.0 Specialized Reports

9.1 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 122 Asset Fleet Builder

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

Revenue Vehicles Support Vehicles Manage Fleets

Orphaned Assets

Any Asset Type	Tag/ID/VIN/Plate	Any Mfr...	Any Model	Year Mfd	Any Subtype...	Any Vehicle Type	Any Status	Action				
Agency	Asset Type	Asset Tag	External ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action

Asset Fleet Builder

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

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

Build Revenue or Support Fleets

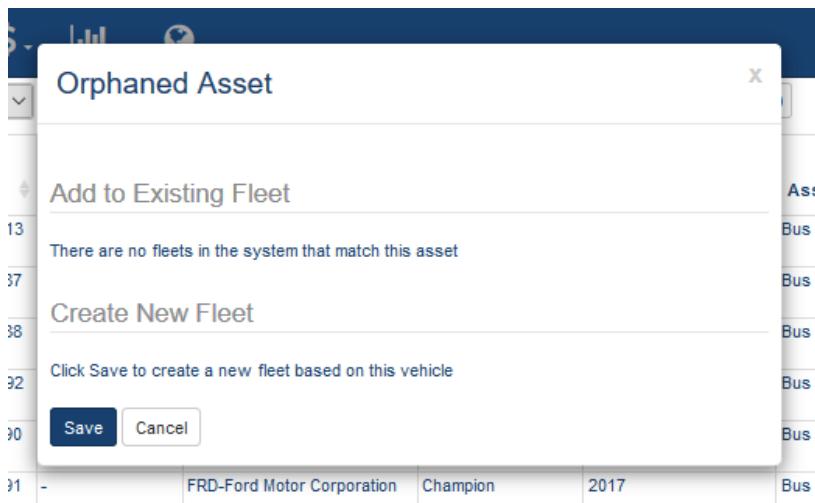
Build Revenue Vehicles Fleets
Build Support Vehicles Fleets

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

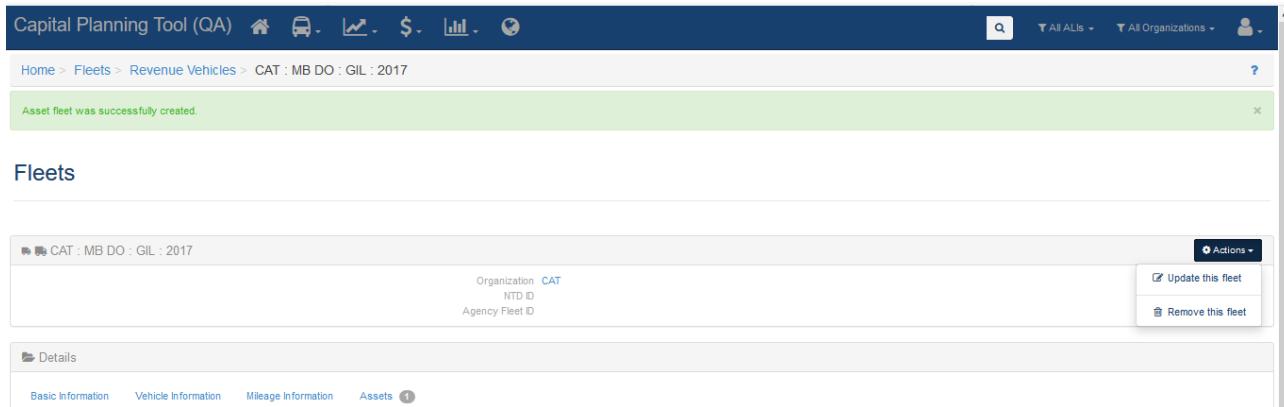
Figure 123 Asset Fleet Builder—Orphaned Assets

The screenshot shows the 'Fleets' section of the Capital Planning Tool (QA). At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is active. Below it, the 'Orphaned Assets' section is displayed with a grid of asset data. The grid includes columns for Agency, Asset Type, Tag, ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. Several rows of data are shown, each with an 'Add to Fleet' button in the Action column. An orange arrow points from the 'Manage Fleets' tab to the 'Orphaned Assets' section. Another orange arrow points from the 'Add Asset to Fleet' button in the grid to the 'Add Asset to Fleet' button in the 'Orphaned Asset' modal window.

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 124 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 125 Adding a New Fleet**Figure 126 Update Asset Fleet Details****Update Asset Fleet****NTD ID**

0

Agency Fleet ID**NTD Notes**

Notes will appear in generated NTD report.

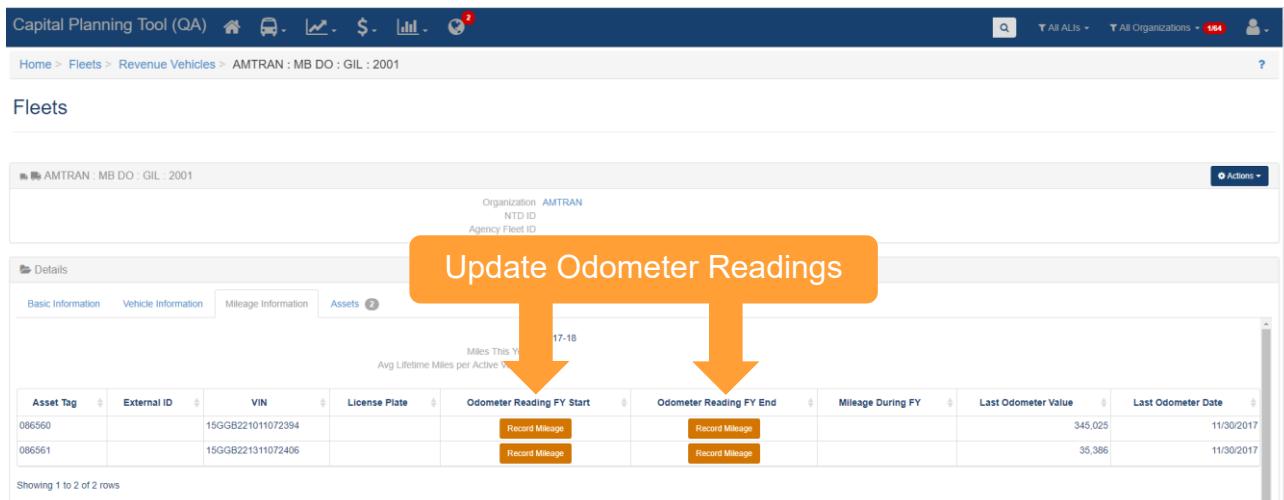
Update Asset fleet**Cancel****Figure 127 Update Odometer Readings**

Figure 128 Remove or Add Assets from within a Fleet

The screenshot shows the TransAM Capital Planning Tool interface. The top navigation bar includes links for Home, Fleets, Revenue Vehicles, and the current page, AMTRAN : MB DO : GIL : 2001. Below the navigation is a search bar and user account information. The main content area is titled 'Fleets' and displays a list of vehicles under 'AMTRAN : MB DO : GIL : 2001'. The list includes columns for Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of data are shown: 086561 and 086560. An orange callout box with the text 'Add or Remove Assets' and a downward-pointing arrow is positioned over the 'Action' column for the second row, highlighting the green plus sign icon.

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

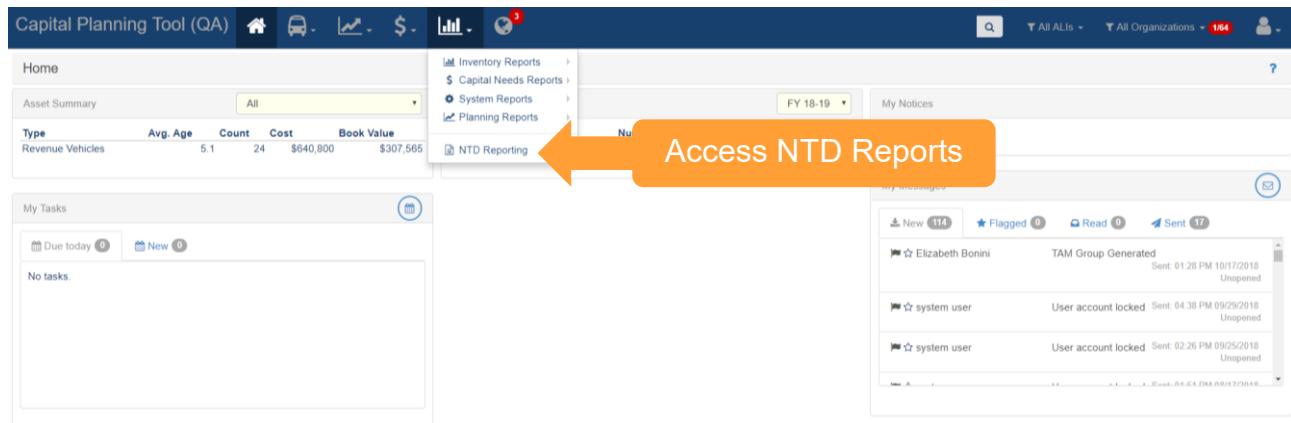
9.2 NTD Asset Reports

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 129 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 130 Table of Previously Generated NTD Reports

The screenshot shows the 'NTD Reporting' module. At the top, there's a header with a 'New NTD Form' button and a dropdown for 'FY 16-17'. Below this is a table with columns: Organization, Fiscal Year, Status, Created At, and Creator. One row is visible, showing 'CARBON' as the organization, 'FY 16-17' as the fiscal year, 'Unsubmitted' as the status, '10:41 AM 10/19/2018' as the created at time, and 'Elizabeth Bonini' as the creator. A large orange callout bubble with the text 'Create New NTD Forms' points to the 'New NTD Form' button. Another orange callout bubble with the text 'Click to Access Existing Forms' points to the table rows.

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

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 131 Create New Reporting Year Forms

New NTD Report

Organization
BUTLER-BUTLER County Community Public Transportation

Fiscal Year
FY 2016 - 2017

Agency Information

Reporter Name
Elizabeth Bonini

Reporter Title

Reporter Department

Reporter Email
ebonini@pa.gov

Reporter Phone
9999999999

Reporter Phone Ext

Save NTD Form ← Click Save NTD Form Button

Figure 132 NTD Report Details and Data

CARBON FY 16-17

Actions

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

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

Submit, Create a New Version, or Remove

Details				
Versions	History	Date	Creator	Download
		10:41 AM 10/19/2018	Elizabeth Bonini	Unsubmitted

Access Forms or Add a Comment

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

Figure 133 Download each NTD Form

Success

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

Download A-15

Download A-20

Download A-30

Download A-35

10.0 Admin Tools

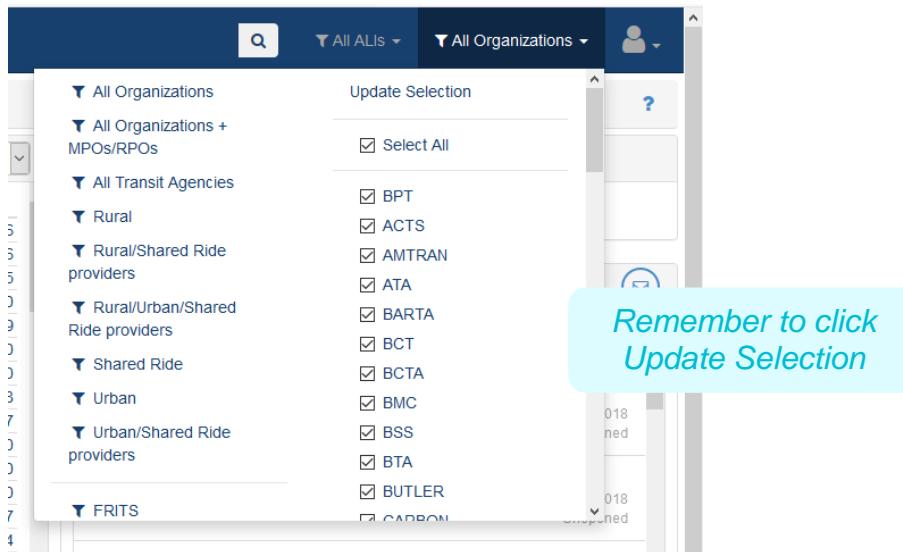
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

Figure 134 Admin User and Organization Options

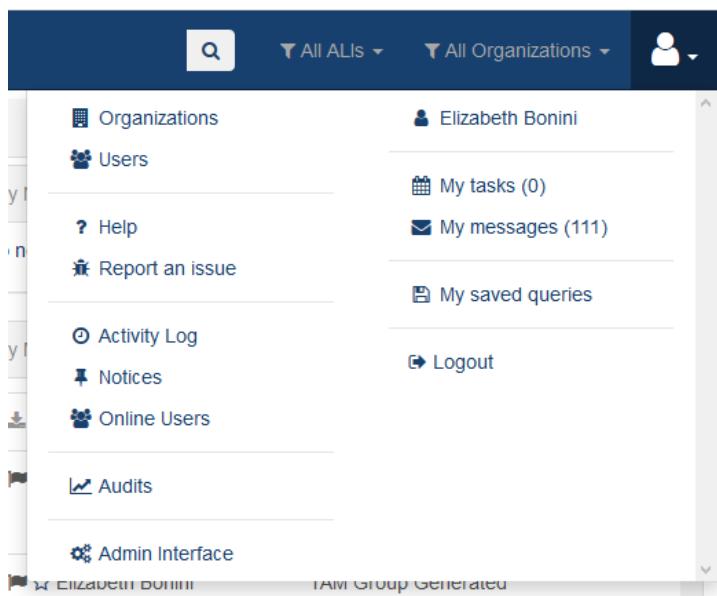


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

Figure 135 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 136 Admin User Options

10.1 Organizations

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

Figure 137 Admin Organizations

The screenshot shows the Admin Organizations page. At the top, there is a navigation bar with icons for home, search, and other functions. Below the navigation bar, the URL is 'Home > Organizations'.

At the top left of the main area, there are three buttons: '+ New Transit Operator', '+ New Planning Partner', and 'Agency Type ▾'. On the far right of this row are several small icons.

The main content is a table with the following columns: Type, Organization, Name, Full Address, Phone, Ext, Fax, and Web Site. There are two rows of data:

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

An orange callout box with the text 'Add new organizations' points to the first button ('+ New Transit Operator') at the top left of the table.

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

Figure 138 Add an Organization

10.2 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 139 Admin Users

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

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

Figure 140 Add a User

New User

User Organizations

* Organization: Not Selected

Organizations:

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

Choose All >

Selected:

Roles & Privileges

* User Role: Not Selected

User Privileges:

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

User Details

* First Name: _____

* Last Name: _____

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

10.3 Notices

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

Figure 141 Notices

+ Add a notice

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 142 Add a Notice

New Notice

* Subject
[Text input field]

* Summary
[Text input field]

Details
[Text input field]

Organization
[Dropdown menu: All]

* Start Displaying
[Date: 07/20/2018] Hour [12:00 PM]

Stop Displaying
[Date: 07/20/2018] Hour [11:00 PM]

* Notice Type
[Dropdown menu: System Notice]

Create Notice

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

Figure 143 Notice on the Dashboard

My Notices

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

My Messages

10.4 Online Users

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

Figure 144 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
5eeba2509d607833bd955fb5bb756f	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
09baecbbd50cc11679481d1102fb252	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

10.5 Admin Interface

The 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 admin interface, as much of the system functionality resides within the 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 admin interface, or are unsure of how to perform a specific function.

Figure 145 Admin Interface