

# TransAM

*Administrative User*

## User Guide

*prepared for*

**Massachusetts Regional Transit Authorities & Massachusetts  
Department of Transportation – Rail & Transit Division  
(MassDOT - RTD)**

*prepared by*

**Cambridge Systematics, Inc.**



*user guide*

# TransAM

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*prepared by*

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# Table of Contents

<b>1.0</b>	<b>Welcome!</b>	<b>1</b>
1.1	Initial Log In and Password Reset	1
1.2	Ongoing Site Access	2
<b>2.0</b>	<b>Dashboard</b>	<b>3</b>
2.1	Dashboard Elements	3
2.2	Header Menu and Controls	3
<b>3.0</b>	<b>General Features and Tools</b>	<b>5</b>
3.1	Table Controls	5
3.2	Site Filters	5
3.3	Messages	6
3.4	Activity Line Item (ALI) Filter	7
3.5	Organizations Filter	8
3.6	Search	9
3.7	User and Organization Options	9
3.8	Notifications	12
3.9	Help	12
<b>4.0</b>	<b>Asset Inventory</b>	<b>13</b>
4.1	Add an Asset	14
4.2	Accessing Existing Assets	16
4.3	Editing or Updating Existing Asset Profile Data	18
4.4	Updating Existing Asset Lifecycle Data	19
4.5	Action Events (Disposition and Transfer Review)	19
4.6	Adding or Updating Assets by Bulk Update	21
4.7	Map	25
4.8	Groups	27
<b>5.0</b>	<b>Policies</b>	<b>29</b>
5.1	Asset Replacement/Rehabilitation Policy	29
5.2	TAM Policy	37
<b>6.0</b>	<b>Projects</b>	<b>47</b>
<b>7.0</b>	<b>Project Planning</b>	<b>51</b>
7.1	Project Planner	51
7.2	State of Good Repair (SOGR) Capital Project Analyzer	54

<b>8.0</b>	<b>Oversight.....</b>	<b>55</b>
<b>9.0</b>	<b>Funding .....</b>	<b>57</b>
9.1	Programs .....	57
<b>10.0</b>	<b>Reports.....</b>	<b>59</b>
10.1	Inventory Reports.....	59
10.2	Capital Needs Reports.....	60
10.3	System Reports .....	61
10.4	Planning Reports .....	63
<b>11.0</b>	<b>Specialized Reports .....</b>	<b>67</b>
11.1	Asset Fleet Builder.....	67
11.2	NTD Asset Reports .....	70
<b>12.0</b>	<b>Admin Tools.....</b>	<b>75</b>
12.1	Organizations .....	76
12.2	Users .....	77
12.3	Notices .....	78
12.4	Online Users .....	80
12.5	Audits .....	80
12.6	Admin Interface.....	82

## 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 <i>Messages</i> .....	6
Figure 11	Messages .....	6
Figure 12	Message Interface .....	7
Figure 13	ALI Filter .....	7
Figure 14	ALI Filters.....	7
Figure 15	New ALI Filter .....	8
Figure 16	Organization Filter .....	8
Figure 17	Organization Filter Selections.....	9
Figure 18	Search Box .....	9
Figure 19	User Menu .....	9
Figure 20	User Menu Dropdown.....	10
Figure 21	Organization Details .....	10
Figure 22	Profile Details.....	11
Figure 23	Report an Issue .....	11
Figure 24	Notification Drawer .....	12
Figure 25	Help Icon.....	12
Figure 26	Help Content.....	12
Figure 27	Asset Inventory Dropdown .....	13
Figure 28	Adding an Asset.....	14
Figure 29	Select the Organization and Asset Class .....	14
Figure 30	Adding Asset Required Details.....	15
Figure 31	Add the Asset and Go To The New Record .....	15
Figure 32	Existing Assets .....	16
Figure 33	Existing Asset Interface .....	17
Figure 34	Asset Record: Highlights .....	17
Figure 35	Asset Record: Profile and Summary .....	18

Figure 36	Editing the Profile of an Existing Asset.....	18
Figure 37	Updating the Lifecycle of an Existing Asset .....	19
Figure 38	Asset Action Events (Disposition and Transfer) .....	20
Figure 39	Early Disposition Requests.....	20
Figure 40	Bulk Updates .....	21
Figure 41	Bulk Update Tools .....	21
Figure 42	Bulk Update Details .....	22
Figure 43	Bulk Update Spreadsheet Download.....	22
Figure 44	Bulk Update Spreadsheet.....	23
Figure 45	Bulk Update Upload.....	23
Figure 46	Bulk Upload Processing .....	24
Figure 47	Bulk Update Edit .....	24
Figure 48	Asset Map .....	25
Figure 49	Map Customization .....	25
Figure 50	Map Layers .....	26
Figure 51	Map Filter .....	26
Figure 52	Map Asset Details.....	27
Figure 53	Asset Groups .....	27
Figure 54	Adding an Asset to a Group .....	28
Figure 55	Policies Dropdown .....	29
Figure 56	Policy Rule Sets.....	29
Figure 57	Asset Replacement/Rehabilitation Policy .....	30
Figure 58	Asset Replacement/Rehabilitation Policy Filters .....	30
Figure 59	Policy Rules .....	31
Figure 60	Policy Rules Actions Dropdown.....	31
Figure 61	Export rules to Excel (Windows dialog box) .....	31
Figure 62	Modify (Update) Organization Policy Dialog.....	32
Figure 63	Distribute Policy .....	32
Figure 64	Copy Organization Policy Dialog .....	33
Figure 65	Asset Types .....	33
Figure 66	Additional Assets Dropdown Icon.....	34
Figure 67	Asset Type Rules.....	34
Figure 68	Add an Asset Type Rule Dialog Box .....	34
Figure 69	Edit Icon .....	34
Figure 70	Modify Asset Policy Rule .....	35
Figure 71	Asset Type and Asset Subtype rules.....	35
Figure 72	Add an Asset Subtype Rule Icon.....	35



Figure 73	Add an Asset Subtype Rule Dialog .....	36
Figure 74	Modify Asset Subtype Rule .....	36
Figure 75	Remove Asset Subtype Rule.....	37
Figure 76	TAM Policy Dropdown Menu Selection .....	37
Figure 77	TAM Policy Group Management .....	38
Figure 78	TAM Policy Year .....	38
Figure 79	Add New TAM Policy Year .....	39
Figure 80	Group Management Period and Year.....	39
Figure 81	Add Group Button .....	39
Figure 82	Add TAM Group Dialog .....	40
Figure 83	Add TAM Group Dialog <i>With Selections</i> .....	40
Figure 84	Add TAM Group <i>Selections, Asset Categories</i> .....	41
Figure 85	TAM Group Management Status.....	41
Figure 86	TAM Policy Group Metrics .....	42
Figure 87	Editable and Locked Assets .....	42
Figure 88	Asset Type Percentage Settings .....	42
Figure 89	Distribute TAM Policy .....	43
Figure 90	Distributed TAM Policy .....	43
Figure 91	TAM Policy Performance Measures .....	44
Figure 92	Policy Year Filters.....	44
Figure 93	Asset Type Percentage Settings .....	44
Figure 94	Activate Performance Measures.....	45
Figure 95	Capital Projects Table.....	47
Figure 96	New Capital Project .....	48
Figure 97	Capital Project Details .....	48
Figure 98	Add an ALI .....	49
Figure 99	Add an ALI Details.....	49
Figure 100	Project Planner Interface .....	51
Figure 101	Edit Manually Created Capital Projects.....	52
Figure 102	Edit SOGR Capital Projects.....	52
Figure 103	Prioritize Projects <i>Move ALIs to Different Years</i> .....	53
Figure 104	Running SOGR Capital Project Analyzer .....	54
Figure 105	SOG Capital Project Analyzer Processing.....	54
Figure 106	Oversight Options .....	55
Figure 107	Audit Results.....	55
Figure 108	Available Funding Programs .....	57
Figure 109	Funding Program Details.....	57

Figure 110	Reports Dropdown.....	59
Figure 111	Report Exports.....	59
Figure 112	Asset Condition Report.....	59
Figure 113	Asset Age Report.....	60
Figure 114	Asset Funding Source Report .....	60
Figure 115	Backlog Report .....	61
Figure 116	Unconstrained Capital Projects Report .....	61
Figure 117	User Login Report.....	62
Figure 118	Issues Report.....	62
Figure 119	Vehicle Replacement Report.....	63
Figure 120	State of Good Repair Report .....	63
Figure 121	Disposition Report .....	64
Figure 122	Asset Service Life Summary Report.....	64
Figure 123	TAM Service Life Summary Report.....	65
Figure 124	Asset Fleet Builder.....	67
Figure 125	Asset Fleet Builder—Orphaned Assets.....	68
Figure 126	Adding an Orphaned Asset to a Fleet .....	68
Figure 127	Adding a New Fleet .....	69
Figure 128	Update Asset Fleet Details .....	69
Figure 129	Update Odometer Readings.....	70
Figure 130	Remove or Add Assets from within a Fleet .....	70
Figure 131	Access NTD Reports .....	71
Figure 132	Table of Previously Generated NTD Reports.....	71
Figure 133	Create New Reporting Year Forms .....	72
Figure 134	NTD Report Details and Data.....	72
Figure 135	Download each NTD Form .....	73
Figure 136	Admin User and Organization Options.....	75
Figure 137	Organizations.....	75
Figure 138	Admin User Options.....	76
Figure 139	Admin Organizations .....	76
Figure 140	Add an Organization.....	77
Figure 141	Admin Users .....	77
Figure 142	Add a User .....	78
Figure 143	Notices.....	78
Figure 144	Add a Notice .....	79
Figure 145	Notice on the Dashboard.....	79
Figure 146	Active Users.....	80

Figure 147	Admin Audits Page .....	80
Figure 148	Admin Audits Details Page .....	81
Figure 149	Admin Interface.....	82



## 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**

TransAM OCPD

**Instructions**

Enter your email address that you use to login to TransAM and click the button. If your email address is found in the system you will get an email with instructions for resetting your password. If you don't receive an email in a few minutes contact your program manager.

**Forgot Password**

Email

Send me reset password instructions

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**

TransAM OCPD

**Instructions**

Your password must conform to the following:

- At least 8 characters
- Contain at least one upper case and one lower case letter
- Contain at least one number

**Change Your Password**

New password

Confirm your new password

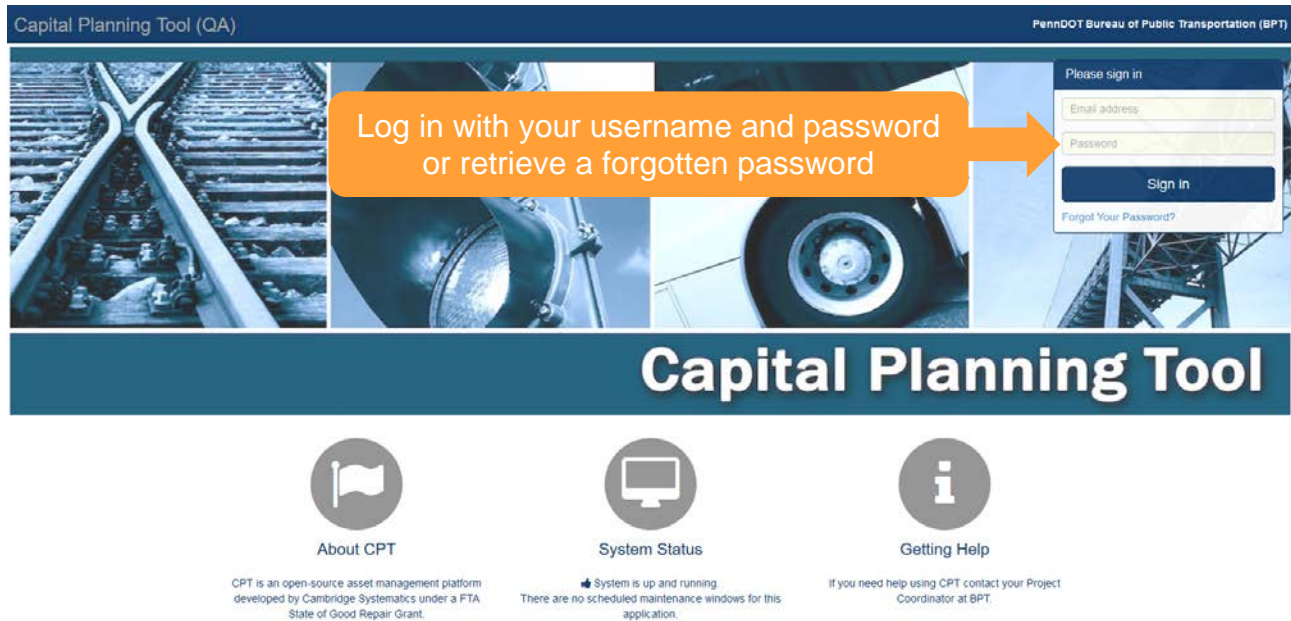
Change my password

## 1.2 Ongoing Site Access

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

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

**Figure 3 Login Screen**



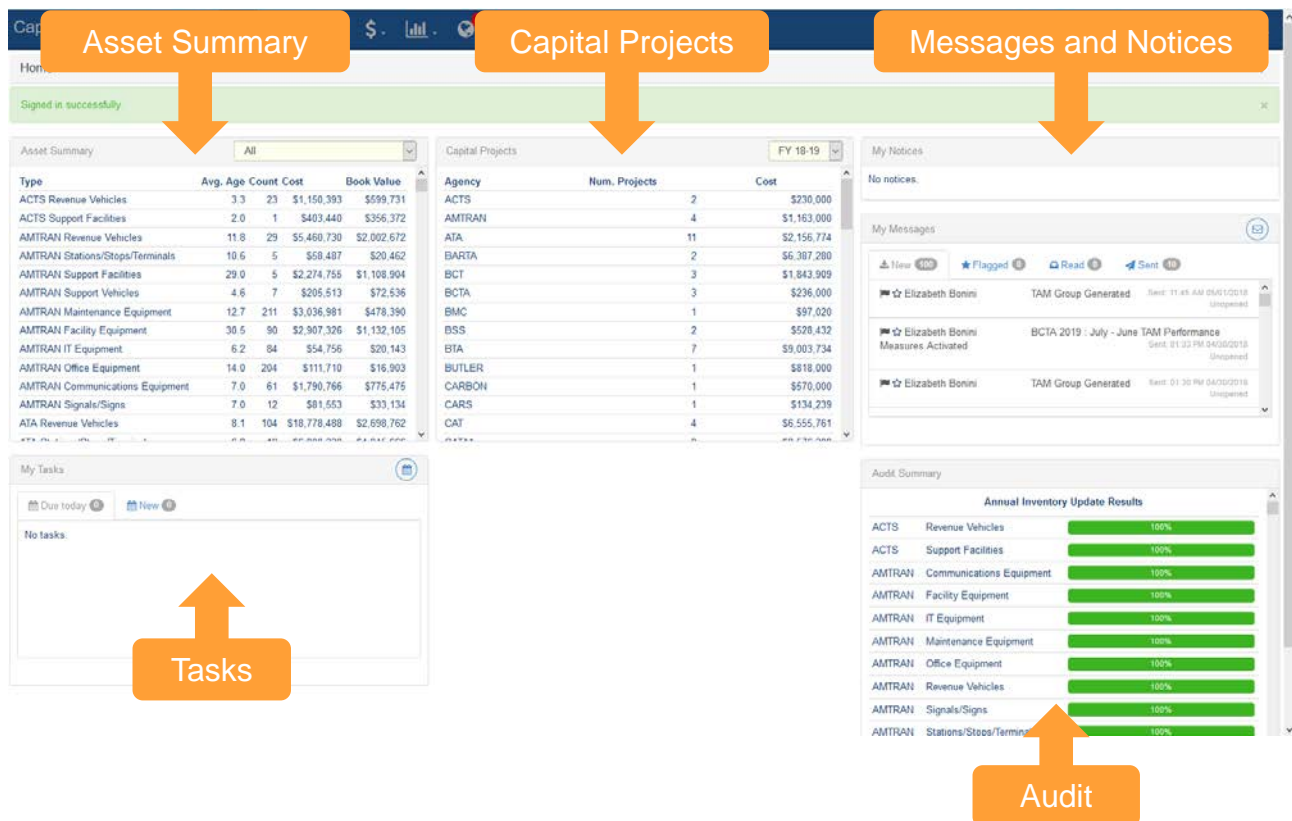
## 2.0 Dashboard

### 2.1 Dashboard Elements

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

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

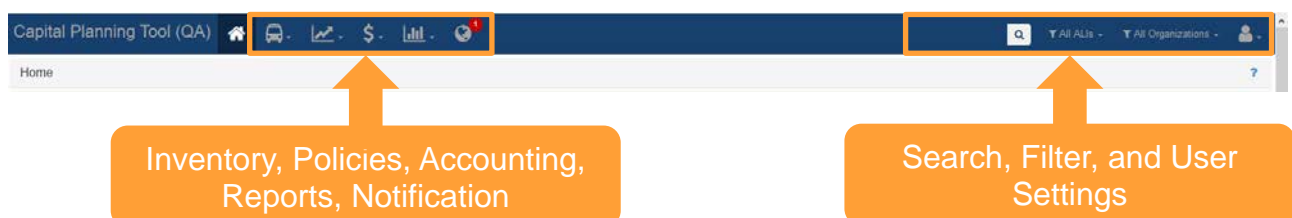
**Figure 4 Dashboard Elements**



### 2.2 Header Menu and Controls

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

**Figure 5 Header Menu**







## 3.0 General Features and Tools

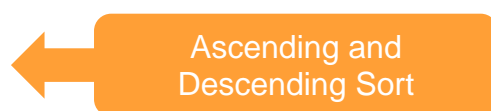
As you progress through the system, there are some common interface elements that you'll encounter often.

### 3.1 Table Controls

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

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

**Figure 6**     **Sorting Controls**



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

**Figure 7**     **Export Button**

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

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

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

**Figure 8**     **Table Tools**



### 3.2 Site Filters

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

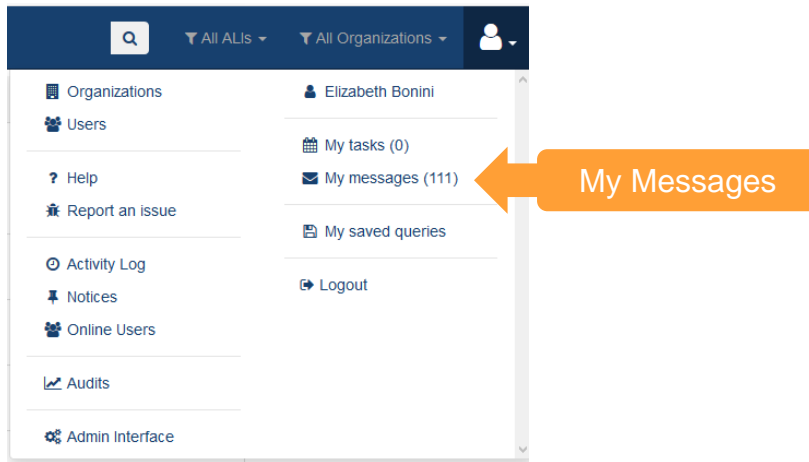
**Figure 9**     **Filter Icon**



### 3.3 Messages

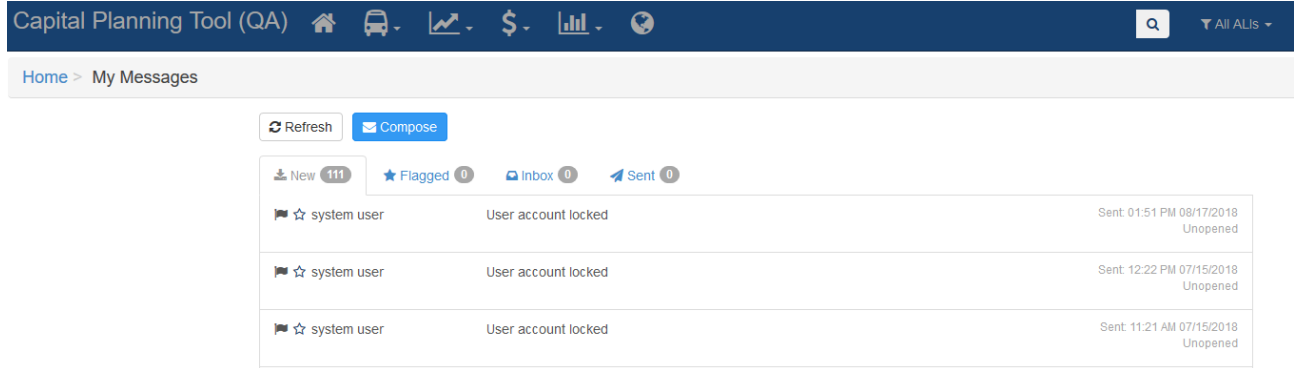
You can access Messages through the User Profile drop down menu.

**Figure 10**    **User Profile**  
*Messages*



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

**Figure 11**    **Messages**



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

**Figure 12** Message Interface

Capital Planning Tool (QA) Home > My Messages > New

New Message

**Users**

BPT-PennDOT Bureau of Public Transportation ^

Nicholas Baldwin  
Andrew Batson  
Jack Birger  
Elizabeth Bonini

Group mode OFF

**Subject**

Enter a brief summary...

**Priority**

Normal

Font Size A B I U S x<sub>0</sub> x<sub>8</sub> T<sub>x</sub> [Table Icon] [Link Icon] [Unlink Icon] [Omega Icon]

Message Body

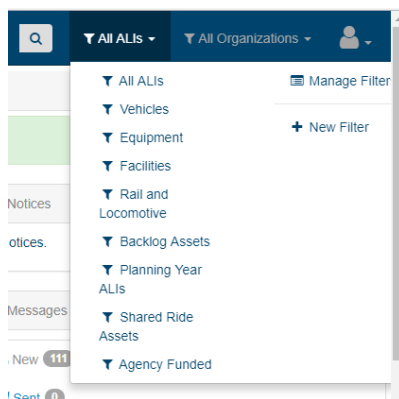
Send...

### 3.4 Activity Line Item (ALI) Filter

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

**Figure 13** ALI Filter

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

**Figure 14** ALI Filters

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

**Figure 15** New ALI Filter

Capital Planning Tool (QA) Home ALI Filters > New

**Details**

\* Name  
Enter a name for this filter

\* Description  
Enter a description for this filter

\* Shared With  
☐ No One  
☐ BPT  
☐ All Organizations

**Parameters**

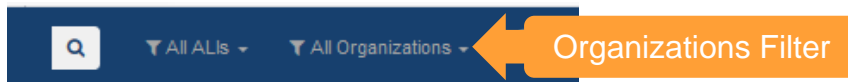
Type  
SOGR: All  
Scope  
Project Location  
Asset Type  
Asset Subtype  
☐ In Backlog  
Owner  
Funding  
☐ Not fully funded

Update ALI Filter Update and Select This Filter

## 3.5 Organizations Filter

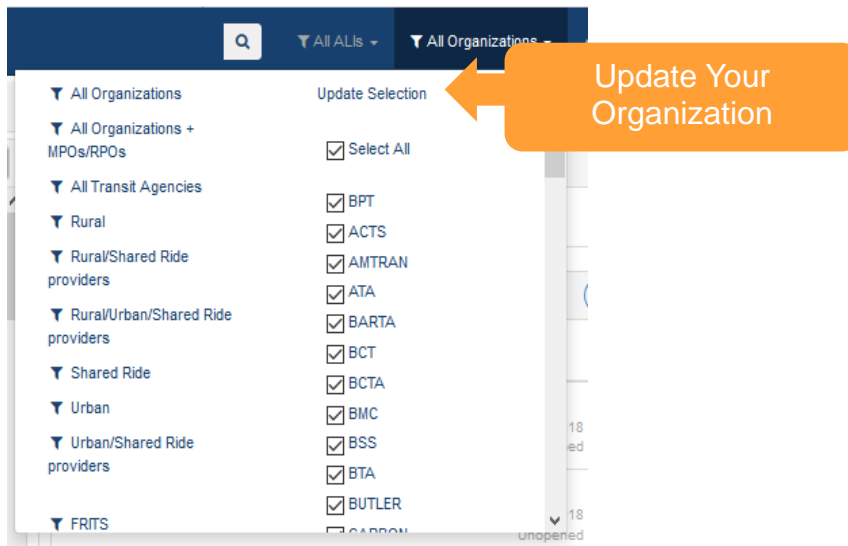
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

**Figure 16** Organization Filter



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

**Figure 17 Organization Filter Selections**



### 3.6 Search

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

**Figure 18 Search Box**



### 3.7 User and Organization Options

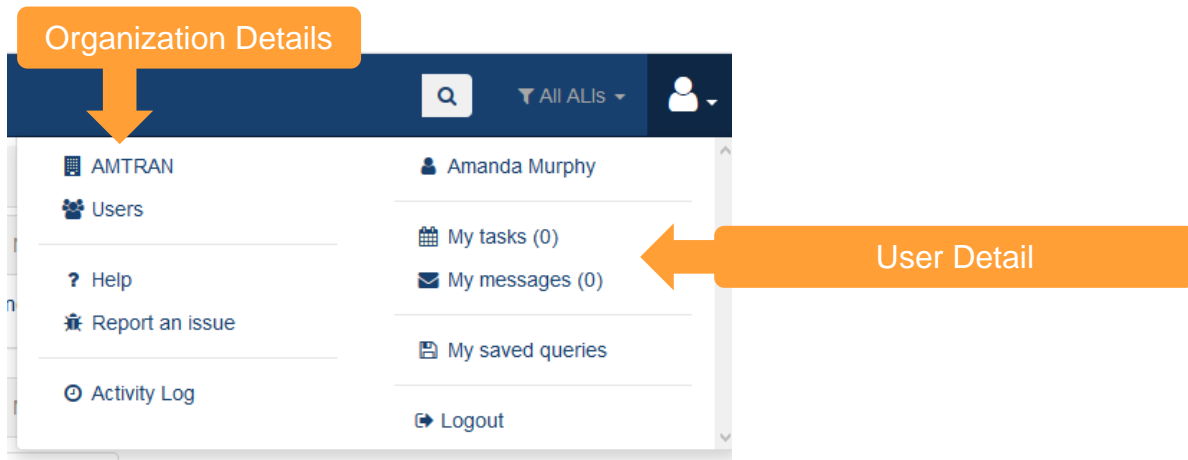
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

**Figure 19 User Menu**



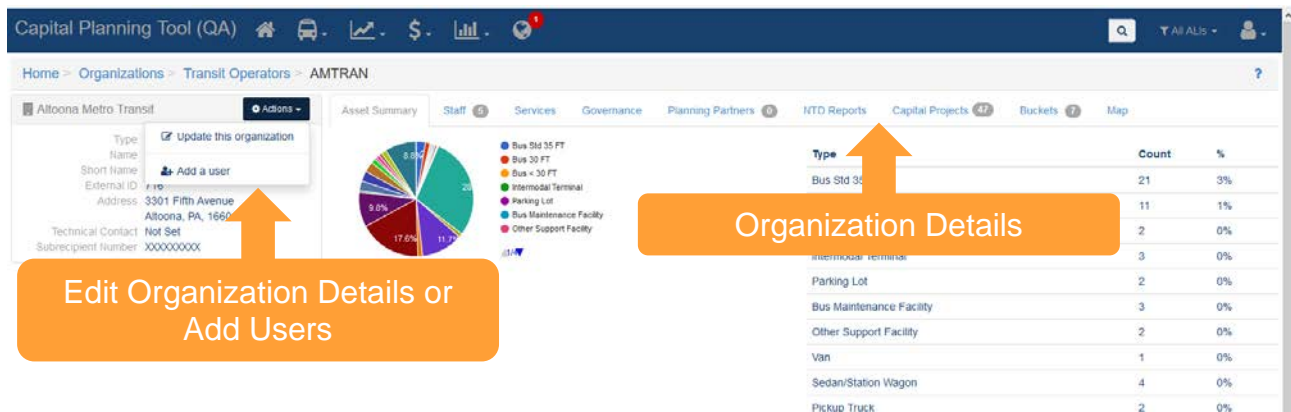
From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

**Figure 20 User Menu Dropdown**



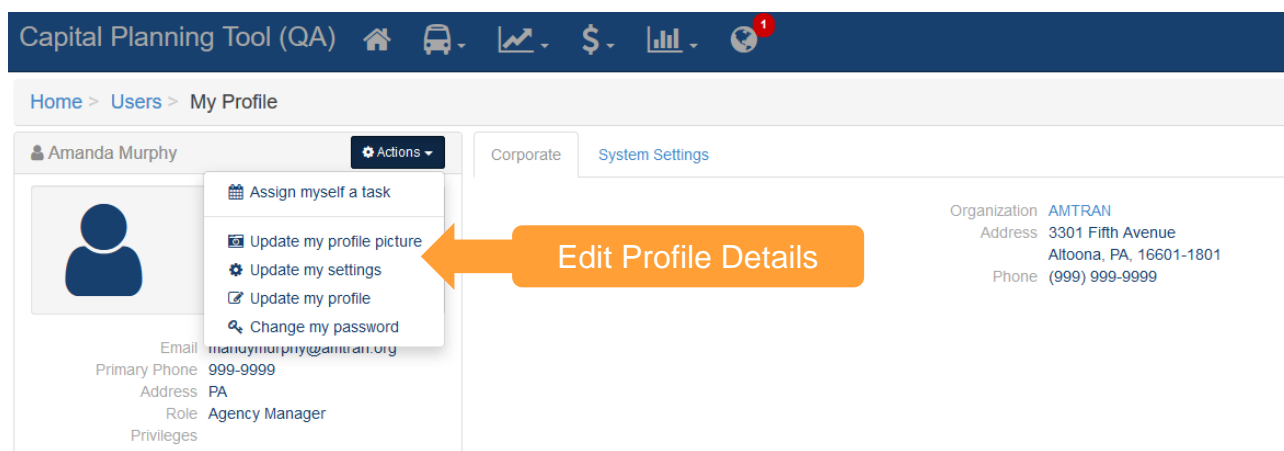
Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

**Figure 21 Organization Details**



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

**Figure 22 Profile Details**



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

**Figure 23 Report an Issue**

## Report an Issue

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

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

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

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

\* Issue Type \* Web Browser Type

\* Comments

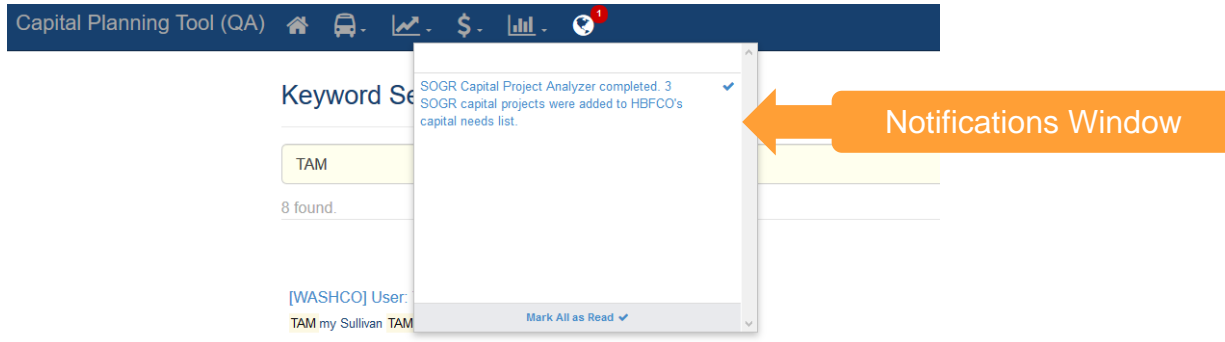
Please provide as much detail as you can...

Create Issue

## 3.8 Notifications

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

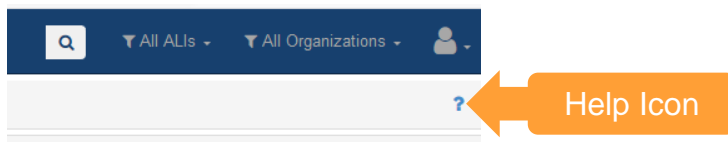
**Figure 24 Notification Drawer**



## 3.9 Help

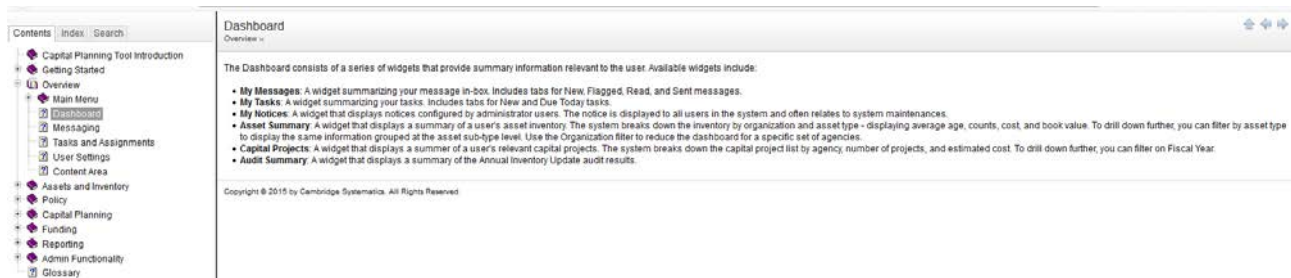
At the top right of each page is a "?" icon.

**Figure 25 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 26 Help Content**





## 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 27**    **Asset Inventory Dropdown**



## 4.1 Add an Asset

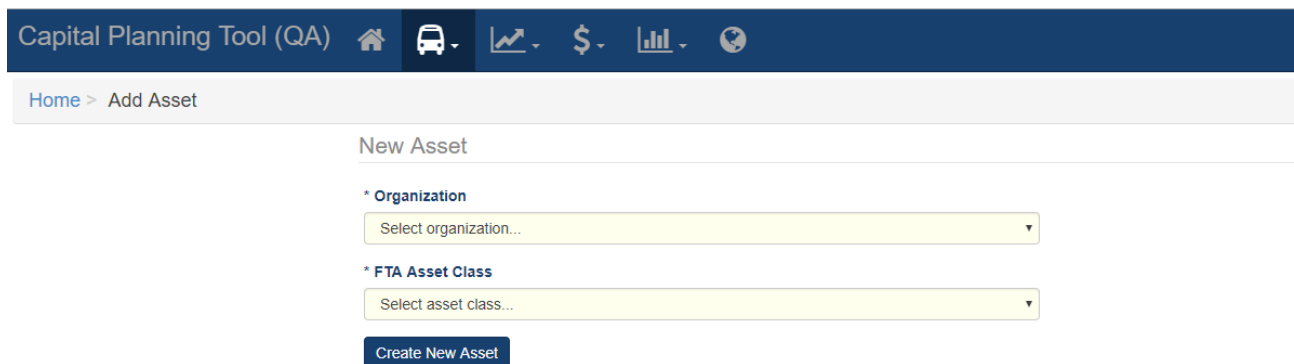
Adding new assets to the asset inventory is simple. First select “Add Asset” from the Asset Inventory dropdown.







**Figure 28** Adding an Asset



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

**Figure 29** Select the Organization and Asset Class



Capital Planning Tool (QA)      

[Home](#) > Add Asset

New Asset

\* Organization  
Select organization... ▼

\* FTA Asset Class  
Select asset class... ▼

Create New Asset

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

**Figure 30 Adding Asset Required Details**

Capital Planning Tool (QA)

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 31 Add the Asset and Go To The New Record**

Capital Planning Tool (QA)

Funding

\* Cost (Purchase)

\* Funding Type

\* Direct Capital Responsibility  
☒ Yes ☐ No

\* Percent Capital Responsibility

\* Ownership Type

Ownership Type (Other)

Procurement & Purchase

\* Purchased New  
☒ Yes ☐ No

\* Purchase Date

Operations

\* Seating Capacity (ambulatory)

\* Standing Capacity

\* ADA Accessible  
☒ Yes ☐ No

\* In Service Date

\* Primary Mode

\* Service Type (Primary Mode)

\* Dedicated Asset  
☒ Yes ☐ No

+ Add Asset & Go to New Record

Add Asset and Go To New Record Button

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## 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 32 Existing Assets**

**Capital Planning Tool (QA)**

Home

Asset Summary

Type	Avg. Age	Value
ACTS Revenue Vehicles	2.3	
ACTS Support Facilities	2.0	
ACTS Guideway	0.0	
ACTS Power & Signal	0.0	
ACTS Track	0.0	
AMTRAN Revenue Vehicles	12.0	
AMTRAN Stations/Stops/Terminals	11.0	
AMTRAN Support Facilities	29.4	
AMTRAN Support Vehicles	4.9	
AMTRAN Maintenance Equipment	12.9	
AMTRAN Facility Equipment	30.2	
AMTRAN IT Equipment	6.6	
AMTRAN Office Equipment	14.1	
AMTRAN Communications Equipment	7.5	
AMTRAN Signals/Signs	6.8	
AMTRAN Guideway	0.0	
AMTRAN Power & Signal	0.0	
AMTRAN Track	0.0	

Revenue Vehicles

- Equipment
- Facilities
- Infrastructure
- Groups
- Action Events
- Map
- Manage Overlay Services
- Add Asset
- Bulk Updates

Buses (Rubber Tire Vehicles)

- Rail Cars
- Ferries
- Other Passenger Vehicles







Click Asset Class to access a list of assets

Agency	Num. Projects
ACTS	
AMTRAN	
ATA	
BARTA	
BCT	
BCTA	
BMC	
BSS	
BT	
BUTLER	
CARBON	
CARS	
CAT	
CATA*	
CCTA	
CHESSR	
CLARCO	
CNTBCC	

My Tasks

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


**Figure 33 Existing Asset Interface**

Capital Planning Tool (QA)      

Home > Revenue Vehicles > Buses (Rubber Tire Vehicles)

### Revenue Vehicles







All Buses (Rubber Tire Vehicles)



Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GGB2713H3189913	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	1FD0E4F56HDC18987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FD0E4F56HDC18988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FD0E4F56HDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FD0E4F56HDC18990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FD0E4F56HDC18991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FD0E4F56HDC18989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FD0E4F56HDC18993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FD0E4F56HDC18994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FD0E4F56HDC18995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FD0E4F56HDC18996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FD0E4F56HDC18997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FD0E4F56HDC18998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#600	LCTA	15GGB311J3190014	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#601	LCTA	15GGB311J3190015	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
*501	LCTA	1FD0E4F56HDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*502	LCTA	1FD0E4F56HDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GGB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GGB201731111860	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	15GGB201031111880	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	15GGB201431111896	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	15GGB2715F1185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F1185793	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 34 Asset Record: Highlights**









Capital Planning Tool (QA)      

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

### Revenue Vehicle Profile

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

Highlights 

History        

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 35 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 field, editing the data, and clicking the check mark; clicking the “X” or clicking outside the field will result in any changes not being saved.

**Figure 36 Editing the Profile of an Existing Asset**

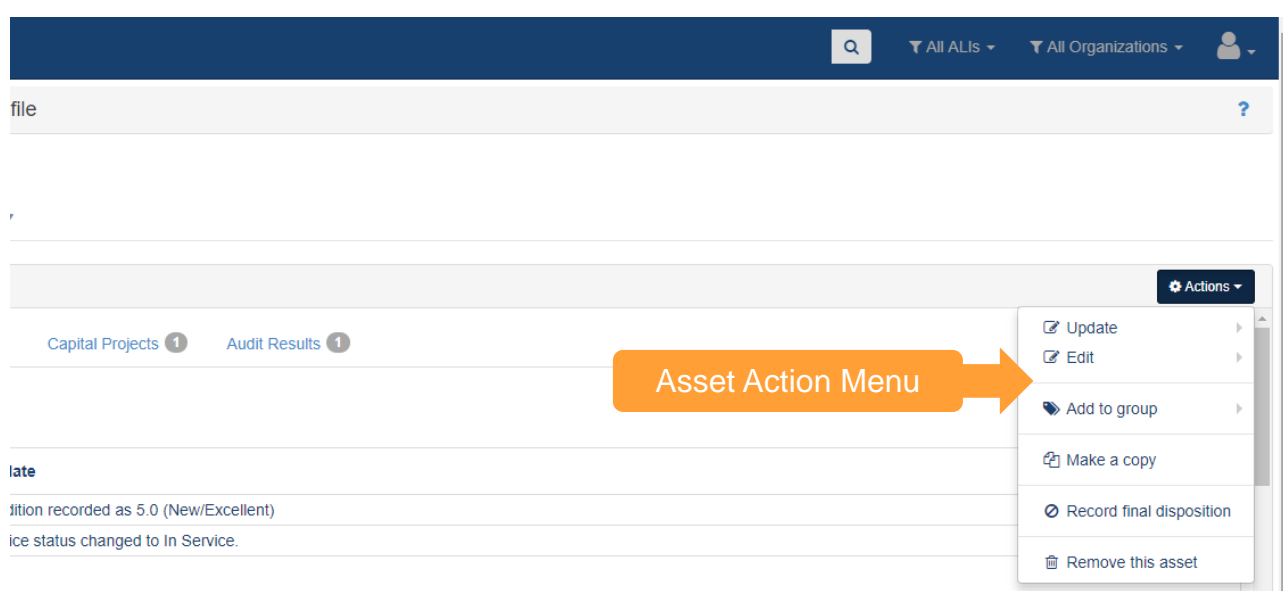
## 4.4 Updating Existing Asset Lifecycle Data

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.

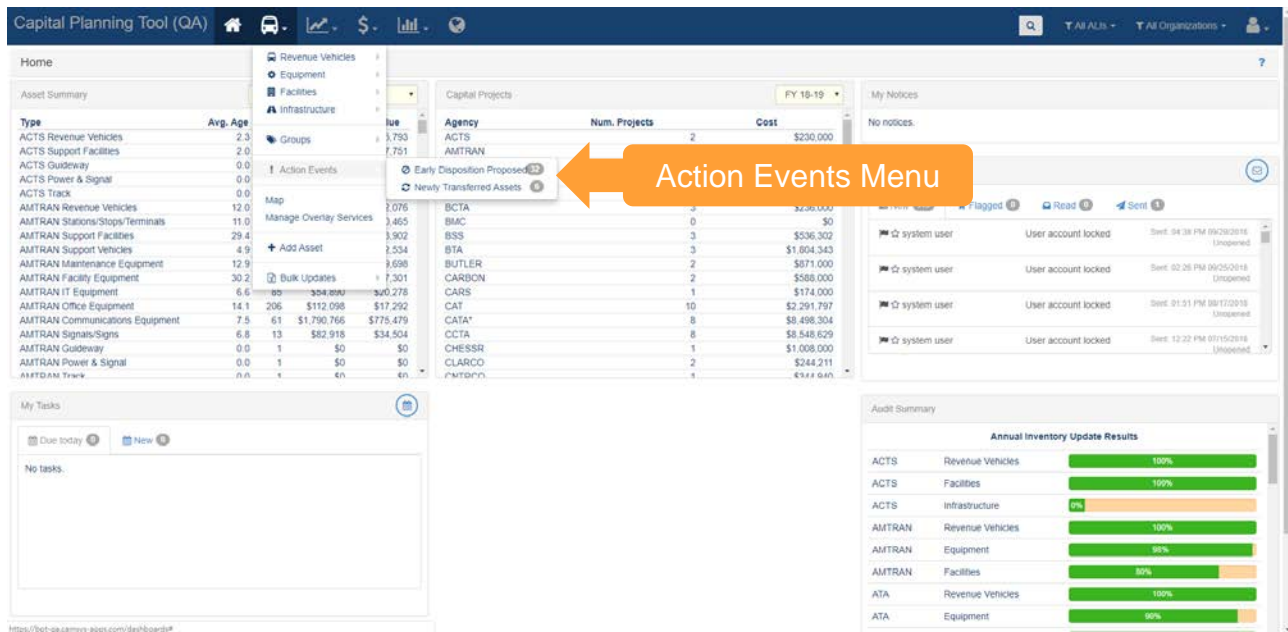
**Figure 37** Updating the Lifecycle of an Existing Asset



## 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.

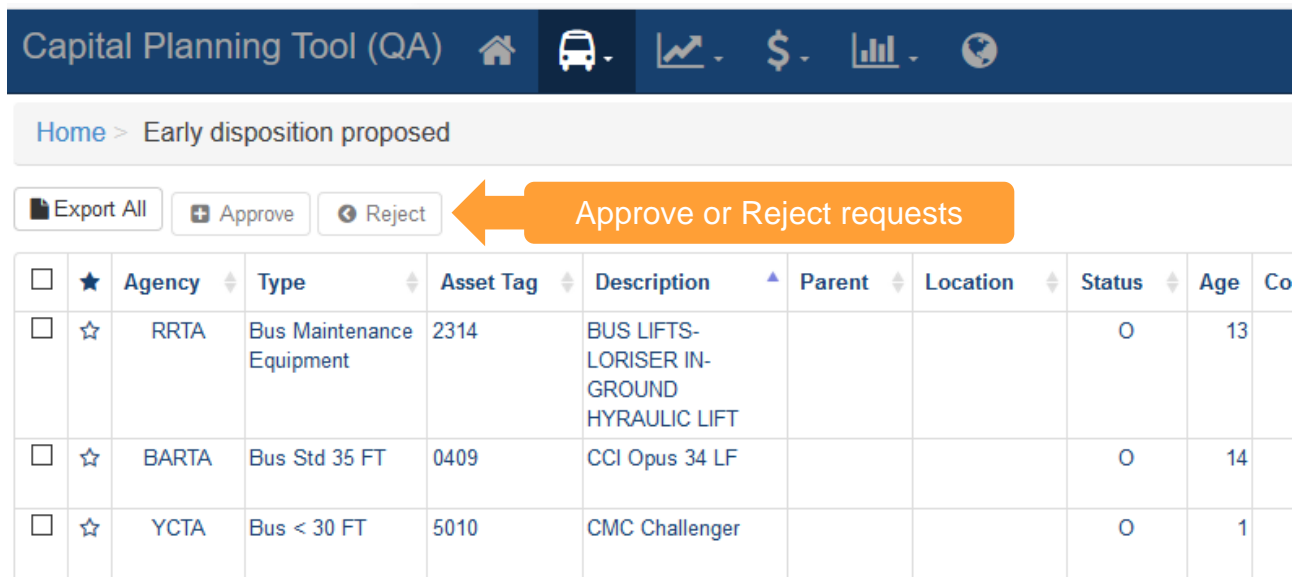
Action Events depend on the disposition of an asset to perform certain functions. The available functions will vary depending on individual permissions and organizational policy. Action Events occur when an asset is proposed for an early disposition or an asset is newly transferred. You can submit a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

**Figure 38 Asset Action Events (Disposition and Transfer)**


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

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

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

**Figure 39 Early Disposition Requests**




## 4.6 Adding or Updating Assets by Bulk Update









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

**Figure 40 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 41 Bulk Update Tools**

Capital Planning Tool (QA)      							
Home > Bulk Updates							
<div>  Create a new Template            Upload a Template           Filter Status ▾         </div>							
Agency	File Name	Content	Loaded By	Status	Num Rows Processed	Num Rows Added	
PIKECO	pikeco_transit_inventory_updates_file_handler_2018-04-17.xlsx	Inventory Updates	Toni Marino	Complete	30		
END		Inventory Updates	BETHANY JONES	Complete	84		
WBT	IT_EQUIPMENT_UPDATE.xlsx	Inventory Updates	BETHANY JONES	Complete	84		

Bulk Update Tools

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

**Figure 42 Bulk Update Details**

Capital Planning Tool (QA) Home Bulk Updates Download Template

**Bulk Update Templates**

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

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

Once you click **create** a spreadsheet will be generated that you can save to your computer. After the template has been downloaded, open the template using 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**  
[Empty]

**Pia Asset Class**  
Select fia asset class...

Create Template

Choose these parameters

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

**Figure 43 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 44 Bulk Update Spreadsheet**

Asset	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep
AZE18G284REM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD12N08YU020684	In Service	01/23/2018			1.00	01
AZE18G2MDG6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD12N08YU020685	In Service	01/23/2018			1.00	01
AZE18G3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD12N08YU020686	In Service	01/23/2018			1.00	01
AZE18G473GA4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090105	In Service	01/23/2018			1.00	01
AZE18G4M4FE	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090106	In Service	01/23/2018			2.00	01
AZE18G5E6GE2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090107	In Service	01/23/2018			2.00	01
AZE18G5JDCX	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090108	In Service	01/23/2018			2.00	01
AZE18G69LBE	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090109	In Service	01/23/2018			2.00	01
AZE18G79JH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE29151090110	In Service	01/23/2018			2.00	01
AZE18G80G8N8	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091505	In Service	01/23/2018			2.00	01
AZE18G8E1G6	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091506	In Service	01/23/2018			2.00	01
AZE18G93JGC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091507	In Service	01/23/2018			2.00	01
AZE18G95FM0	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091508	In Service	01/23/2018			2.00	01
AZE18GAA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091509	In Service	01/23/2018			2.00	01
AZE18GB8HD9C	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091510	In Service	01/23/2018			2.00	01
AZE18GB8DK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091511	In Service	01/23/2018			2.00	01
AZE18GCLN8H4	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091512	In Service	01/23/2018			2.00	01
AZE18GCLN8L2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091513	In Service	01/23/2018			2.00	01
AZE18GDB97DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091514	In Service	01/23/2018			2.00	01
AZE18GEB7EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091515	In Service	01/23/2018			2.00	01
AZE18GEB7EKK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091516	In Service	01/23/2018			2.00	01
AZE18GFB4C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091517	In Service	01/23/2018			2.00	01
AZE18GFB4C00	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091518	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091519	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091520	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091521	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091522	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091523	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	731		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091524	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	732		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091525	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	733		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091526	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	734		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091527	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	735		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091528	In Service	01/23/2018			2.00	01
AZE18GGB0000	ATA	736		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL G8g 29LF	1GGE271981091529	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 45 Bulk Update Upload**

Capital Planning Tool (QA)

Home > Bulk Updates > New Template

**Bulk Updates**

Use this form to upload spreadsheets that you have downloaded from CPT and completed. The spreadsheets can contain either:

- Life Cycle Updates for existing inventory
- Disposition updates for existing inventory

Make sure to select the right type of content before uploading the file.

If you force the update, be aware that this might overwrite and change existing data that CANNOT be undone.

Once the file has been uploaded it will be processed by CPT and the inventory updated which might take a few minutes. You can check the progress by clicking on the file name in the table.

**Spreadsheet**

**Spreadsheet Content**

Inventory Updates

**Organization**

CATA - Centre Area Transportation Authority

**Spreadsheet**

Browse... cta\_transit\_inventory\_updates\_file\_handler\_2018-06-13.xlsx

Select a spreadsheet that has been downloaded from CPT, edited, then saved

Upload spreadsheet

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 46 Bulk Upload Processing**

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 47 Bulk Update Edit**

Home > Bulk Updates > cata\_transit\_inventory\_updates\_file\_handler\_2018-06-13.xlsx

File Upload

Actions

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

Make changes to this bulk upload job

Details

Processing Process Log Updates

Name cata\_transit\_inventory\_updates\_file\_handler\_2018-06-13.xlsx

Content Inventory Updates

Uploaded By Elizabeth Bonini

Upload Time 04:36 PM 06/13/2018

Status Complete

Time Started 04:36 PM 06/13/2018

Time Complete 04:36 PM 06/13/2018

Rows Processed 127

Num. Rows Added 0

Num. Rows Skipped 127

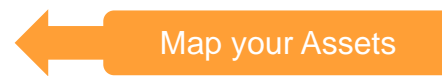
Num. Rows Replaced 0

Num. Rows Failed 0

## 4.7 Map

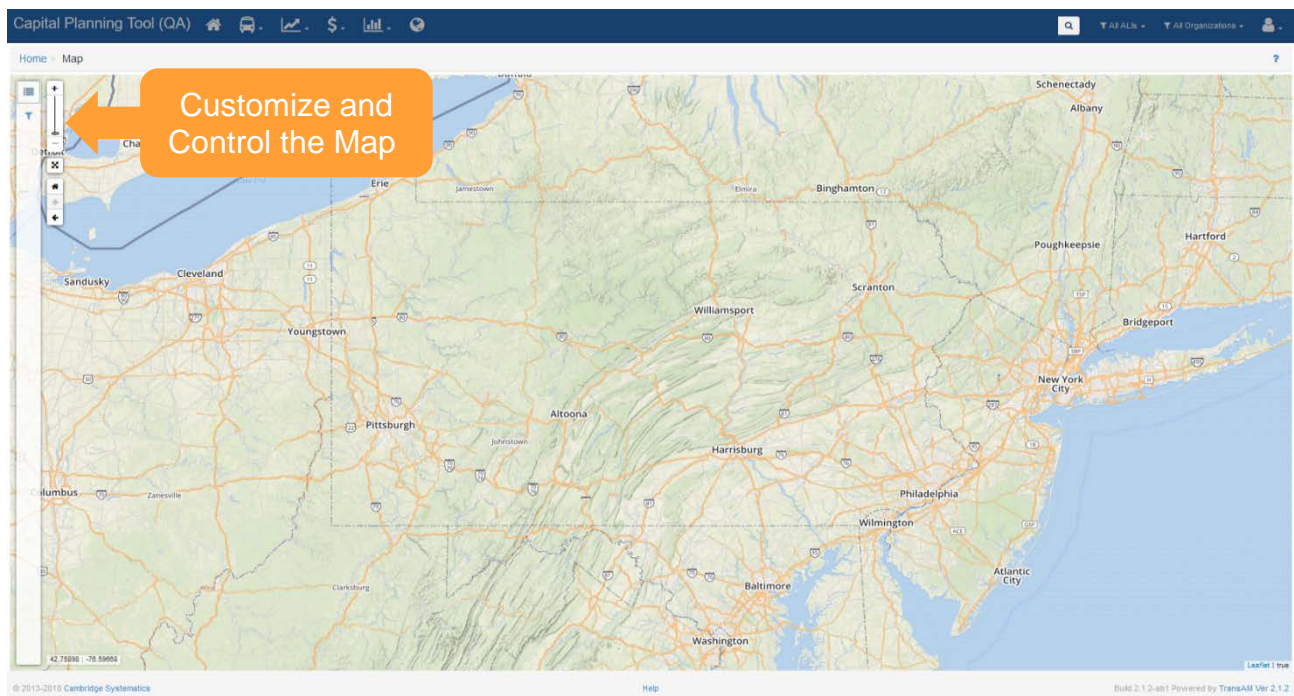
The system provides the ability to overlay asset locations on a map.

**Figure 48 Asset Map**



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

**Figure 49 Map Customization**



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

**Figure 50    Map Layers**



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

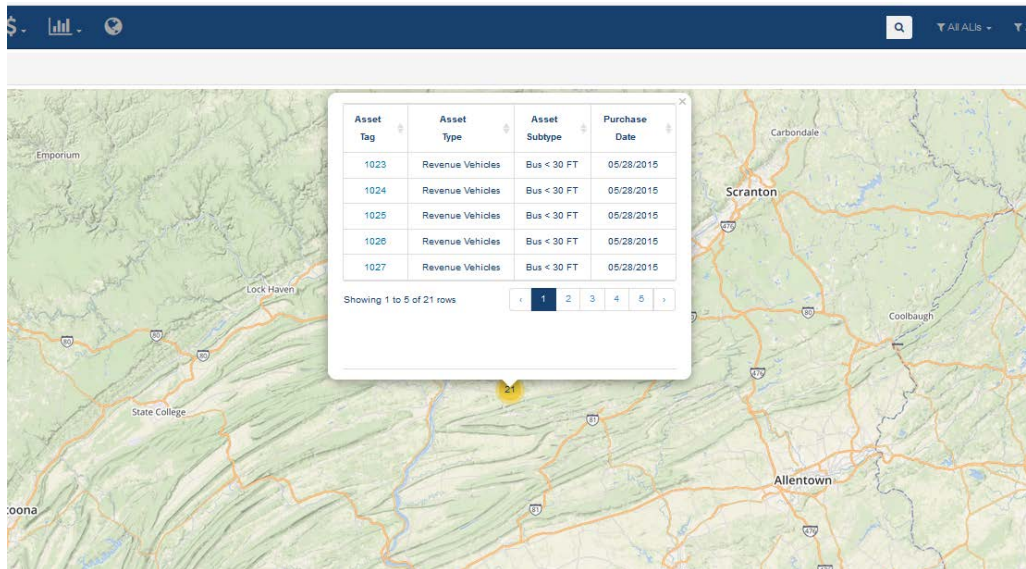
**Figure 51    Map Filter**





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

**Figure 52 Map Asset Details**



## 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 53 Asset Groups**



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

**Figure 54 Adding an Asset to a Group**

The screenshot displays the 'Capital Planning Tool (QA)' interface. The breadcrumb trail is: Home > Revenue Vehicles > Buses (Rubber Tire Vehicles) > Buses (Rubber Tire Vehicles) Profile. The page title is 'Revenue Vehicle Profile' with the identifier 'CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017'.

The 'Highlights' section includes tabs for History (2), Tasks (3), Comments (1), Documents (2), Photos (3), Charts, Asset Values, Capital Projects (1), and Audit Results (1). Below these is an 'Event' table:

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

An orange arrow points from the text 'Add an Asset to a Group' to the 'Add to group' option in the 'Actions' menu. The 'Actions' menu also includes 'Update', 'Edit', 'Make a copy', 'Record final disposition', and 'Remove this asset'.

The 'Asset Summary' section on the left shows the profile details:

- Name: CAT
- Description: GIL 35' Low Floor
- Asset Tag: #1701
- External ID
- Manufacturer: GIL
- Class: Revenue Vehicles
- Type: Bus Std 35-FT
- Status: In Service
- Age: 0 yrs
- Mileage

The 'Profile' section on the right has tabs for Identification & Classification, Characteristics, Funding, Procurement & Purchase, Operations, and Registration & Title. The 'Identification & Classification' tab is active, showing the 'Vehicle Identification Number (VIN)' as 15GGB2713H3189913, the 'Asset ID' as #1701, and the 'External ID' and 'NTD ID' fields.



## 5.0 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 55 Policies Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The main content area is divided into two sections. The left section, titled 'Home', contains an 'Asset Summary' table with columns for Type, Avg. Age, and Count. The right section, titled 'Capital Projects', contains a table with columns for Agency, Num. Projects, and Cost. An orange arrow points to the 'Policies' option in the dropdown menu.

Type	Avg. Age	Count
ACTS Revenue Vehicles	3.3	23
ACTS Support Facilities	2.0	1
AMTRAN Revenue Vehicles	11.8	29
AMTRAN Stations/Stops/Terminals	10.6	5
AMTRAN Support Facilities	29.0	5
AMTRAN Support Vehicles	4.6	7
AMTRAN Maintenance Equipment	12.7	211
AMTRAN Facility Equipment	30.5	90
AMTRAN IT Equipment	6.2	84
AMTRAN Office Equipment	14.0	204
AMTRAN Communications Equipment	7.0	61
AMTRAN Signals/Signs	7.0	12
ATA Revenue Vehicles	8.1	104

Agency	Num. Projects	Cost
ACTS	2	\$85,768
AMTRAN	5	\$1,287,100
BART	11	\$2,156,774
BARTA	2	\$6,142,424
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 56 Policy Rule Sets**

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The main content area is divided into two sections. The left section, titled 'Home', contains an 'Asset Summary' table with columns for Type, Avg. Age, and Count. The right section, titled 'Capital Projects', contains a table with columns for Agency, Num. Projects, and Cost. An orange arrow points to the 'TAM Policy' option in the Policy Rule Sets section.

Type	Avg. Age	Count
ACTS Revenue Vehicles	3.3	23
ACTS Support Facilities	2.0	1
AMTRAN Revenue Vehicles	11.8	29
AMTRAN Stations/Stops/Terminals	10.6	5
AMTRAN Support Facilities	29.0	5
AMTRAN Support Vehicles	4.6	7
AMTRAN Maintenance Equipment	12.7	211
AMTRAN Facility Equipment	30.5	90
AMTRAN IT Equipment	6.2	84
AMTRAN Office Equipment	14.0	204
AMTRAN Communications Equipment	7.0	61
AMTRAN Signals/Signs	7.0	12
ATA Revenue Vehicles	8.1	104

Agency	Num. Projects	Cost
ACTS	2	\$85,768
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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

### 5.1 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 57 Asset Replacement/Rehabilitation Policy**

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The main content area is divided into two sections: 'Home' and 'Policies'. The 'Home' section displays an 'Asset Summary' table with columns for Type, Avg. Age, Count, Cost, and Book Value. The 'Policies' section displays a table of asset types and their associated costs. An orange callout box labeled 'Asset Replacement/Rehabilitation Selection' points to the 'Asset Replacement/Rehabilitation Policy' dropdown menu in the Policies section.

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

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

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.

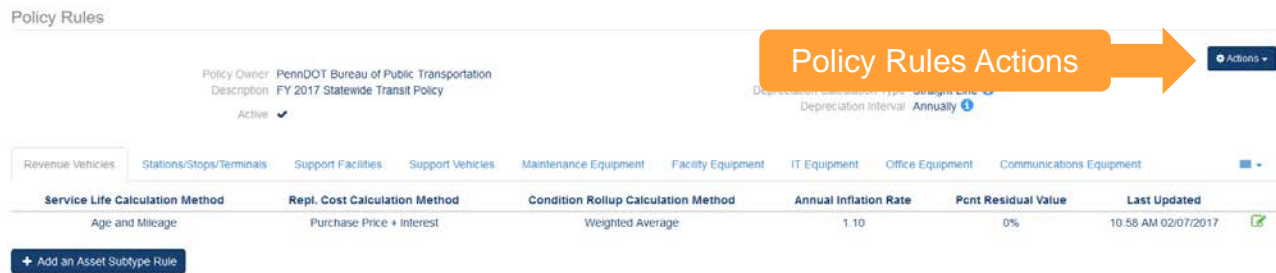
**Figure 58 Asset Replacement/Rehabilitation Policy Filters**

The screenshot shows the Capital Planning Tool (QA) interface with the 'Asset Replacement/Rehabilitation Policy' filters. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The main content area is divided into two sections: 'Home' and 'Policies'. The 'Home' section displays an 'Asset Summary' table with columns for Type, Avg. Age, Count, Cost, and Book Value. The 'Policies' section displays a table of asset types and their associated costs. Two orange callout boxes labeled 'Organization Filter' and 'Policy Year' point to the respective dropdown menus in the Policies section.

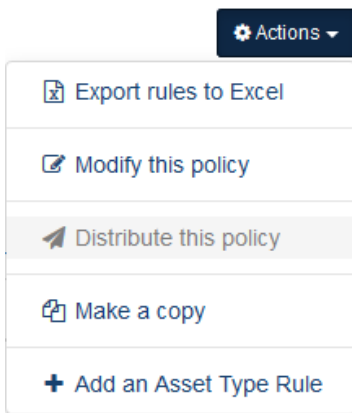
Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	3.3	23	\$1,150,393	\$
ACTS Support Facilities	2.0	1	\$403,440	\$
AMTRAN Revenue Vehicles	11.8	29	\$5,460,730	\$2,000,000
AMTRAN Stations/Stops /Terminals	10.6	5	\$58,487	\$20,462
AMTRAN Support Facilities	29.0	5	\$2,274,755	\$1,108,904
AMTRAN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

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

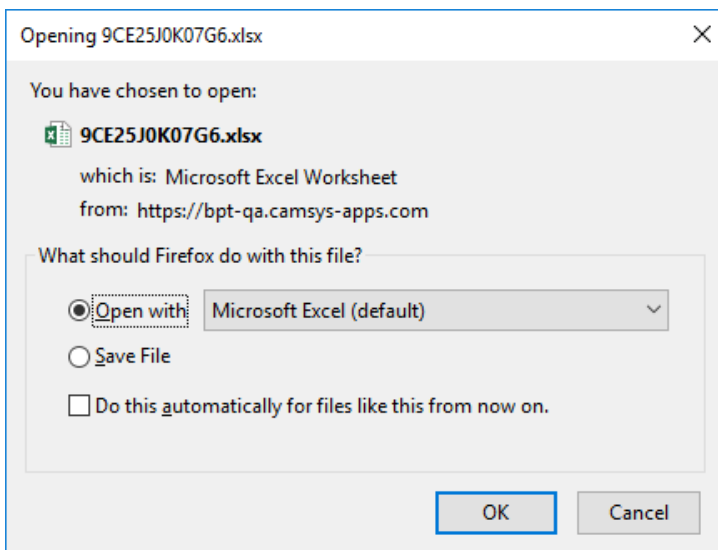
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

**Figure 59 Policy Rules**

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

**Figure 60 Policy Rules Actions Dropdown**

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

**Figure 61 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 62    Modify (Update) Organization Policy Dialog**

### Update Policy

**Description**  
FY 2017 Statewide Transit Policy

**Condition Threshold**  
2.5

**Depreciation Calculator**  
Straight Line

**Depreciation Interval**  
Annually

Update Policy

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

**Figure 63    Distribute Policy**

### Distribute Policy

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

Run...

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

**Figure 64 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 65 Asset Types**

Revenue Vehicles

Stations/Stops/Terminals

Support Facilities

Support Vehicles

Maintenance Equipment

Facility Equipment

IT Equipment

Office Equipment

Communications Equipment

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

Pcnt Residual Value

0%

Last Updated

10:58 AM 02/07/2017

+ Add an Asset Subtype Rule

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

Asset Types

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

**Figure 66 Additional Assets Dropdown Icon**



The Asset Type Rules are listed below the Asset Types.

**Figure 67 Asset Type Rules**

Revenue Vehicles										
Stations/Stops/Terminals										
Support Facilities										
Support Vehicles										
Maintenance Equipment										
Facility Equipment										
IT Equipment										
Office Equipment										
Communications Equipment										
Service Life Calculation Method										
Repl. Cost Calculation Method										
Condition Rollup Calculation Method										
Annual Inflation Rate										
Pcnt Residual Value										
Last Updated										
Age and Mileage										
Purchase Price + Interest										
Weighted Average										
1.10										
0%										
10:58 AM 02/07/2017										
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

Asset  
Type Rules

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 68 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  
Age Only

\* Replacement Cost Calculation Type  
Replacement Cost

Condition Rollup Calculation Type  
Weighted Average

\* Annual Inflation Rate  
1.1

\* Pcnt Residual Value  
0

\* Condition Rollup Weight  
0

Save Cancel

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

**Figure 69 Edit Icon**



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

**Figure 70 Modify Asset Policy Rule**

**Modify Rule: IT Equipment** X

---

\* **Service Life Calculation Type** ...  
 Age Only

\* **Replacement Cost Calculation Type** ...  
 Purchase Price + Interest

**Condition Rollup Calculation Type**  
 Weighted Average

\* **Annual Inflation Rate**  
 1.1

\* **Pcnt Residual Value** ...  
 0

\* **Condition Rollup Weight** ...  
 0

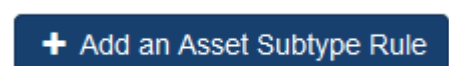
The Asset Subtypes that are displayed will correspond to the Asset Type tab. The available Asset Subtype rules are the same as the Subtypes in your inventory. The estimated service life information at the Asset Subtype level describes the asset and its expected lifespan.

**Figure 71 Asset Type and Asset Subtype rules**

Revenue Vehicles										
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 <input checked="" type="checkbox"/>
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 35 FT	DF	144	500,000	\$0	FY 17-18	✓				48 <input checked="" type="checkbox"/>
Bus Std 35 FT	BD	144	500,000	\$0	FY 17-18	✓				48 <input checked="" type="checkbox"/>
Bus Std 35 FT	HD	144	500,000	\$0	FY 17-18	✓				48 <input checked="" type="checkbox"/>
Bus 30 FT	DF	120	350,000	\$0	FY 17-18	✓				48 <input checked="" type="checkbox"/>
Bus < 30 FT	DF	60	150,000	\$0	FY 17-18	✓				48 <input checked="" type="checkbox"/>

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

**Figure 72 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 73 Add an Asset Subtype Rule Dialog**

Add an Asset Subtype Rule X

---

Replacement

**Asset Subtype**  
New Subtype

**New Asset Subtype Name** **New Asset Subtype Description**

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

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

**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 74 Modify Asset Subtype Rule**

Modify Rule: Guideway: At-Grade X

---

Replacement

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

**\* ESL Used (Mo)** **Lease Length Months**

**\* Purchase Replacement Code** **\* Lease Replacement Code**

**\* Engineering Design Code** **\* Construction Code** **\* Rehabilitation Code**

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 75 Remove Asset Subtype Rule**



## 5.2 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 76 TAM Policy Dropdown Menu Selection**

Capital Planning Tool (QA)

Home

Asset Summary

All

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

Policies

- Capital Projects
- Project Planner
- SOGR Capital Project Analyzer
- All Audit Results
- Annual Inventory Update Results

Asset Replacement/Rehab

TAM Policy

TAM Policy Selection

Num. Projects	Cost
2	\$230,000
5	\$1,287,100
11	\$2,156,774
2	\$6,387,280
3	\$1,843,909
3	\$236,000
1	\$97,020
2	\$528,432
7	\$9,003,734
1	\$100,000
1	\$570,000
1	\$134,239
4	\$6,555,761

No notice

My Mess

New

☆ E

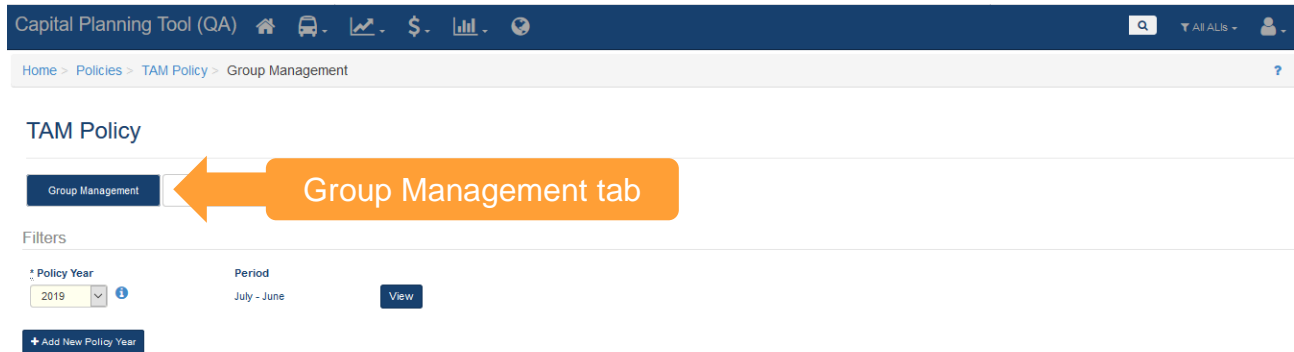
☆ E

☆ E

Perform

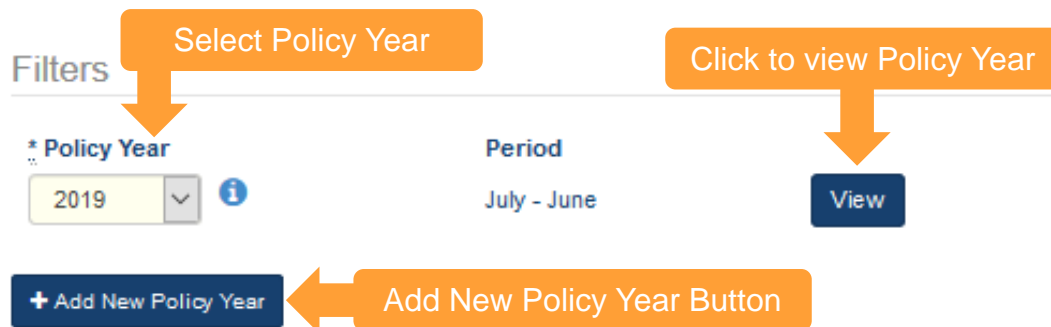
The first step in the creation of a TAM Policy, is to Add a New Policy Year, followed by creating groups. These initial steps can only be completed on the Group Management tab, which is only accessible by users with the TAM Group Manager or Admin permission.

**Figure 77 TAM Policy Group Management**



Select a Policy Year that you wish to view and click the “View” button. If a Policy Year does not exist or you need to create a policy for a new year, click the “Add New Policy Year” button and select the TAM Policy year you wish to create. The Period will populate based on individual client reporting period, based on initial system configuration. Below the Policy Year Filter, Group Management is performed on the chosen Policy Year.

**Figure 78 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 79 Add New TAM Policy Year**

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

**Figure 80 Group Management Period and Year**

Group Management : 2019 : July - June

← Group Management by Period and Year

Group Name	TAM Group Lead	Organizations	Asset Categories	Status
test	Nicholas Baldwin	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	Distributed
Section 5310 TAM	Elizabeth Bonini	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	Distributed
Section 5311	Elizabeth Bonini	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	Distributed

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

**Figure 81 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 82** Add TAM Group Dialog

TAM Group

Add Group

\* Name

\* TAM Group Lead

Not Selected

Selected

Choose All »

« Clear All

\* Asset Categories

Save Cancel

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

**Figure 83** Add TAM Group Dialog  
*With Selections*

TAM Group

Add Group

\* Name

\* TAM Group Lead

My New Group

Elizabeth Bonini

Not Selected

Selected

Click the arrows to add or remove organizations

Choose All »

« Clear All

\* Asset Categories

Save Cancel

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

**Figure 84** Add TAM Group  
*Selections, Asset Categories*

**TAM Group**

Add Group

**Name**  
My New Group

**TAM Group Lead**  
Elizabeth Bonini

**Not Selected**

Search...

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

**Selected**

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

**Asset Categories**

☒ Revenue Vehicles

☐ Equipment

☒ Facilities

Save Cancel

Asset Categories

Once the new group is created, the Status is set to Inactive. You have the option to edit, delete or Generate that Group. Click “Generate” when you are ready to proceed and you will notice that the group Status will change to In Development. Clicking the “Generate” button adds the group to the Group Metrics tab, so the assigned TAM Group Lead can start the process of setting performance measures and editing rules for all organizations within the group. The Group Management tab, is only viewable and editable by users with the TAM Group Manager or Admin permission, and TAM Group Leads who can only access groups to which they have been assigned.

**Figure 85** TAM Group Management 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	

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 86 TAM Policy Group Metrics**

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

**Figure 87 Editable and Locked Assets**

Asset Category	Group Name	Group Status	Organizations	Copied From Previous Year
Revenue Vehicles	New Group	In Development	<a href="#">View</a>	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 type="checkbox"/> Editable	0	<input type="checkbox"/> Editable
BU-Bus	14	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Locked
CU-Cutaway	10	<input type="checkbox"/> Locked	0	<input type="checkbox"/> Editable
OR-Other	0	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Editable
SV-Sports Utility Vehicle	8	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Locked
VN-Van	8	<input type="checkbox"/> Locked	0	<input 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 88 Asset Type Percentage Settings**

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 type="checkbox"/> Editable	10	<input type="checkbox"/> Editable
BU-Bus	14	<input type="checkbox"/> Editable	20	<input checked="" type="checkbox"/> Editable
CU-Cutaway	10	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Editable
OR-Other	0	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Editable
SV-Sports Utility Vehicle	8	<input type="checkbox"/> Editable	0	<input type="checkbox"/> Editable
VN-Van	8	<input type="checkbox"/> Editable	0	<input 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 89 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 [Distribute](#)

Asset Category: Revenue Vehicles | Group Name: New Group | Group Status: In Development | Organizations: [View](#) | Copied From Previous Year: 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	<a href="#">Editable</a>	10	<a href="#">Editable</a>
BU-Bus	14	<a href="#">Editable</a>	20	<a href="#">Editable</a>
CU-Cutaway	10	<a href="#">Editable</a>	25	<a href="#">Editable</a>
OR-Other	0	<a href="#">Locked</a>	10	<a href="#">Locked</a>
SV-Sports Utility Vehicle	8	<a href="#">Editable</a>	10	<a href="#">Editable</a>
VN-Van	8	<a href="#">Editable</a>	10	<a href="#">Editable</a>

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

**Figure 90 Distributed TAM Policy**

Capital Planning Tool (QA) [Home](#) [Bus](#) [Line](#) [\\$](#) [Bar](#) [Pie](#)

TAM Policy

Group Management | **Group Metrics** | Performance Measures

Filters

Policy Year: 2018 | Period: July - June | [View](#)

[+ Add New Policy Year](#)

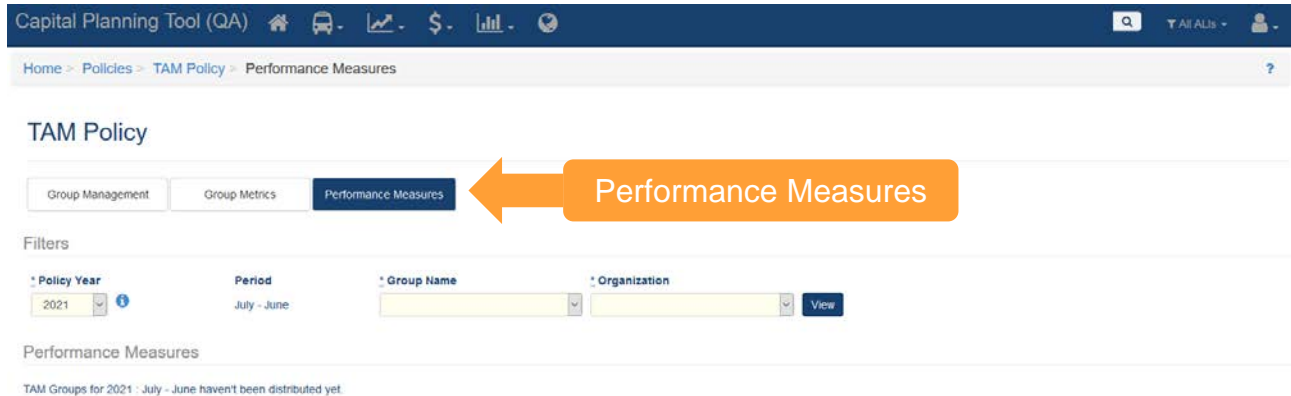
Group Management : 2018 : July - June

[+ Add Group](#)

Group Name	TAM Group Lead	Organizations	Asset Categories	Status
Group 5311	Elizabeth Bonini	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	In Development
Group 5310	Elizabeth Bonini	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	In Development
Example Group	Elizabeth Bonini	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	In Development
New Group	Lydia Chang	<a href="#">View</a>	Revenue Vehicles Equipment Facilities	Distributed

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 91 TAM Policy Performance Measures**



Capital Planning Tool (QA) Home Policies TAM Policy Performance Measures

TAM Policy

Group Management Group Metrics **Performance Measures**

Filters

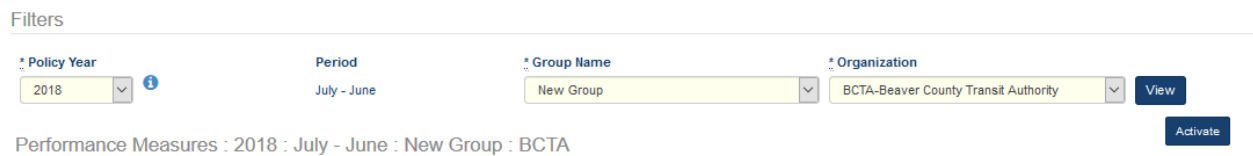
\* Policy Year: 2021 Period: July - June \* Group Name: \* Organization: View

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 92 Policy Year Filters**



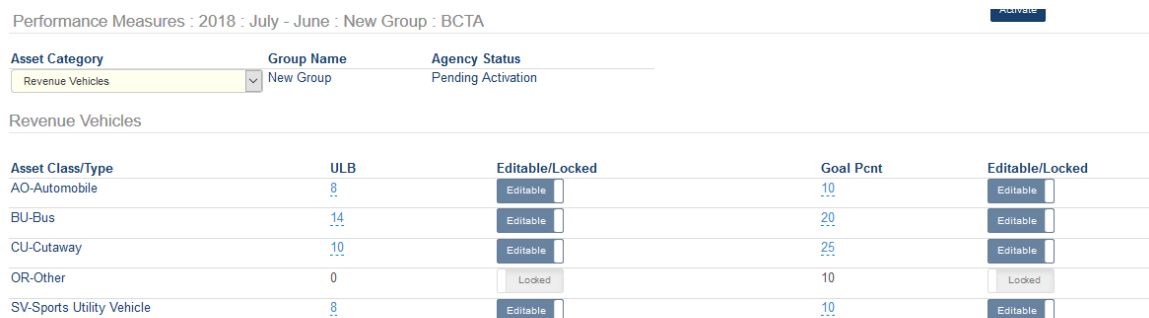
Filters

\* 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 93 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 94    Activate Performance Measures**

TAM Policy

Group Management    Group Metrics    **Performance Measures**

Filters

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

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

Asset Category	Group Name	Agency Status
Facilities	New Group	Pending Activation

Facilities

Asset Class/Type	TERM	Editable/Locked	Goal Pcnt	Editable/Locked
Passenger	3	Editable	0	Editable
Parking	3	Editable	0	Editable

**Activate Button**



## 6.0 Projects

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

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

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

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

**Figure 95 Capital Projects Table**

### Capital Projects

Plan Summary

Capital Needs Chart

FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
\$966,840,985	\$333,276,552	\$108,838,201	\$78,408,870	\$125,370,978	\$179,853,327	\$188,491,652	\$100,343,480	\$256,308,134	\$169,519,292	\$406,353,547	\$180,491,802

+ New Capital Project

Agency

FY

Project

Scope

Emgcy

SOGR

Shadow

Multi Year

Type

Title

Cost

State

Federal

Local

Total

ACTS	FY 18-19	ACTS 18-19 #3990	111		✓			R	Bus: Revenue Rolling Stock: Purchase - Replacement project	\$204,000	\$0	\$0	\$0	\$0	
								E	Mobile Vehicle Lifts	\$26,000	\$0	\$0	\$0	\$0	
					✓			R	Bus: Support Facilities and Equipment: Acquisition project	\$139,500	\$146	\$0	\$4,647	\$4,793	
					✓			R	Bus: Station Stops/Terminals: Acquisition project	\$23,500	\$0	\$0	\$784	\$784	
AMTRAN	FY 18-19	AMTRAN 18-19 #5680	111					I	VOH of Hybrid Electric Gilligs	\$975,000	\$0	\$0	\$32,497	\$32,497	
AMTRAN	FY 18-19	AMTRAN 18-19 #5681	114					I	Admin Building Security Upgrades	\$25,000	\$0	\$20,000	\$167	\$20,167	
AMTRAN	FY 18-19	AMTRAN 18-19 #5907	111					R	test	\$124,100	\$0	\$0	\$0	\$0	

Manually create a new capital project

Manually create a new capital project

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

**Figure 96 New Capital Project**

### New Capital Project

\* Organization

\* Title

Enter a title for this project...

64 characters remaining

Project Locations

PennDOT District 1 (District)

PennDOT District 2 (District)

PennDOT District 3 (District)

PennDOT District 4 (District)

\* Fiscal Year

FY 18-19

\* Scope

\* Project Type

Replacement

☐ Emergency project

☐ Multi year project

\* Description







254 characters remaining

\* Justification

254 characters remaining


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

**Figure 97 Capital Project Details**

Capital Planning Tool (QA)       1

Home > Capital Projects > AMTRAN 18-19 #6087

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

test 

Project Number AMTRAN 18-19 #6087

Fiscal Year FY 18-19

Scope 125

Total Cost \$0

Type Replacement

SOG No

Shadow No

Multi year No

Emergency No

Description

Activity Line Items 0

Supporting Documents 0

Comments 0

Project Description

Project Justification

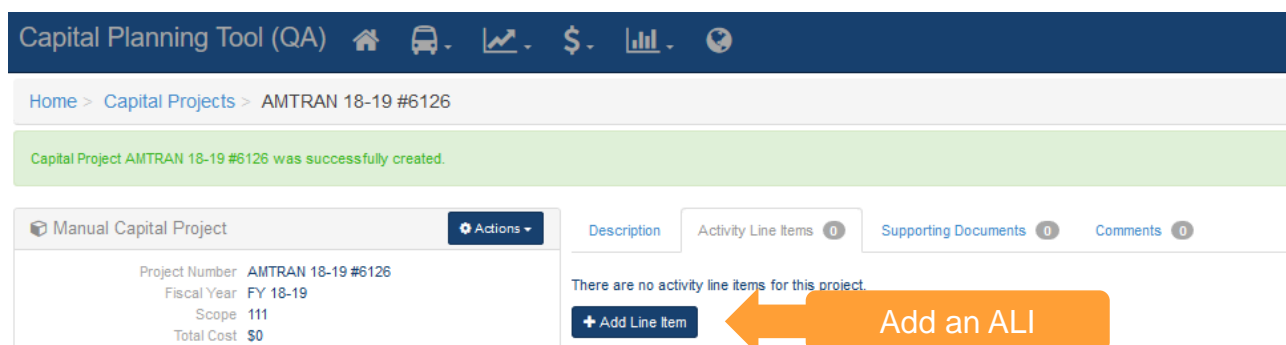
Project Locations Senate District 30 (Senate)

**Edit Capital Project Details**

**Capital Project Additional Details**

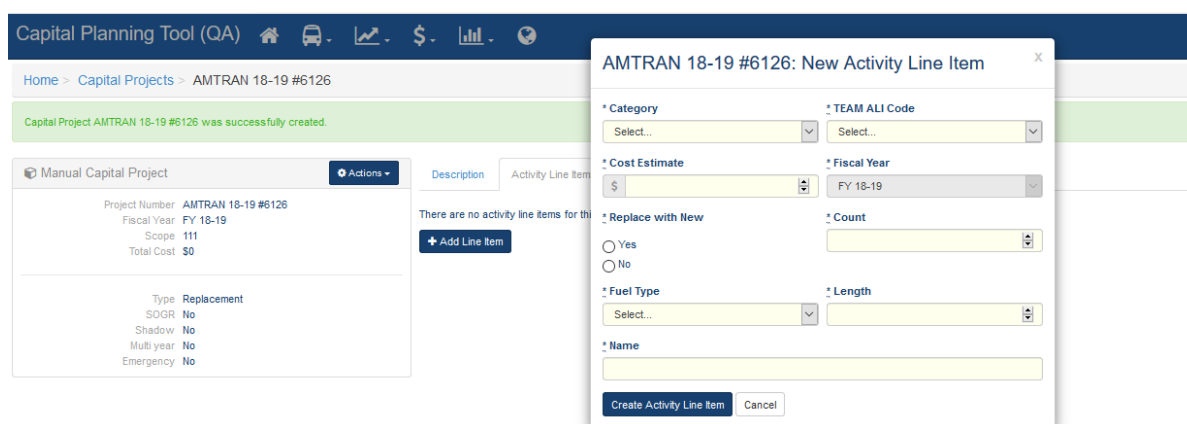
For manually created capital projects, you can add ALIs from the capital project details screen. Click the “Activity Line Items” tab in the additional details, then click the “Add Line Item” button.

**Figure 98 Add an ALI**



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

**Figure 99 Add an ALI Details**



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



## 7.0 Project Planning

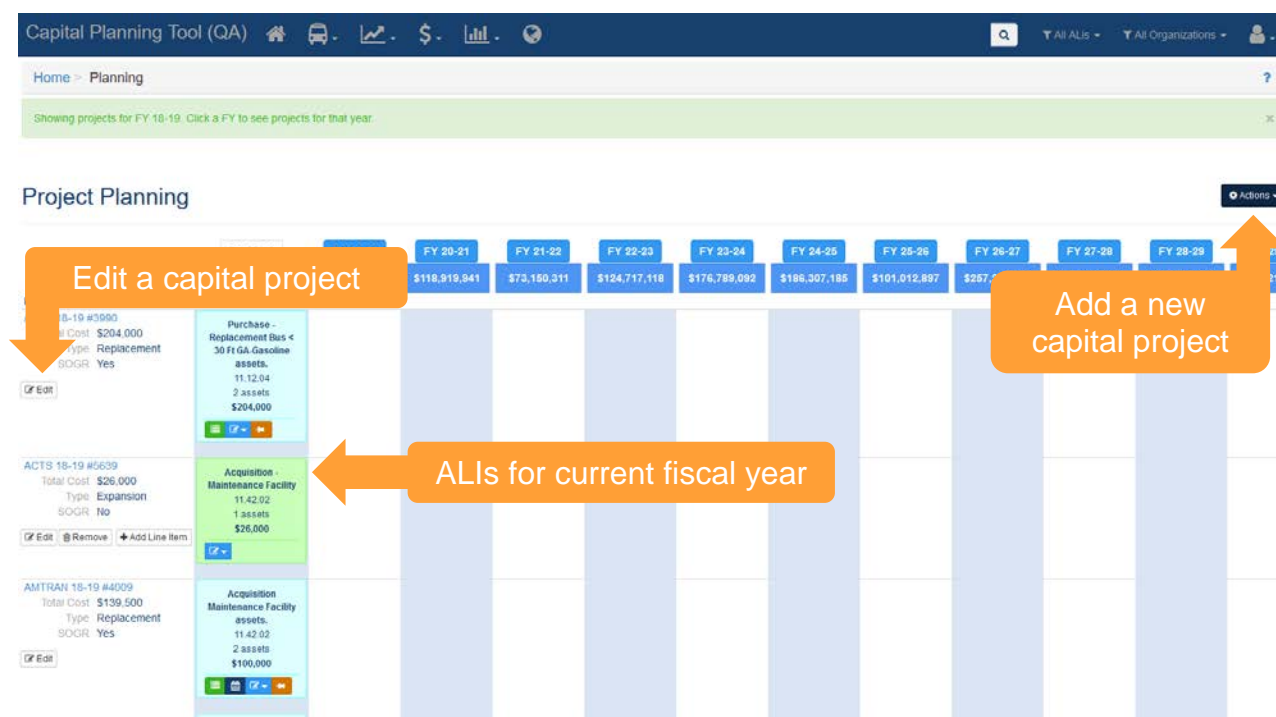
### 7.1 Project Planner

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

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

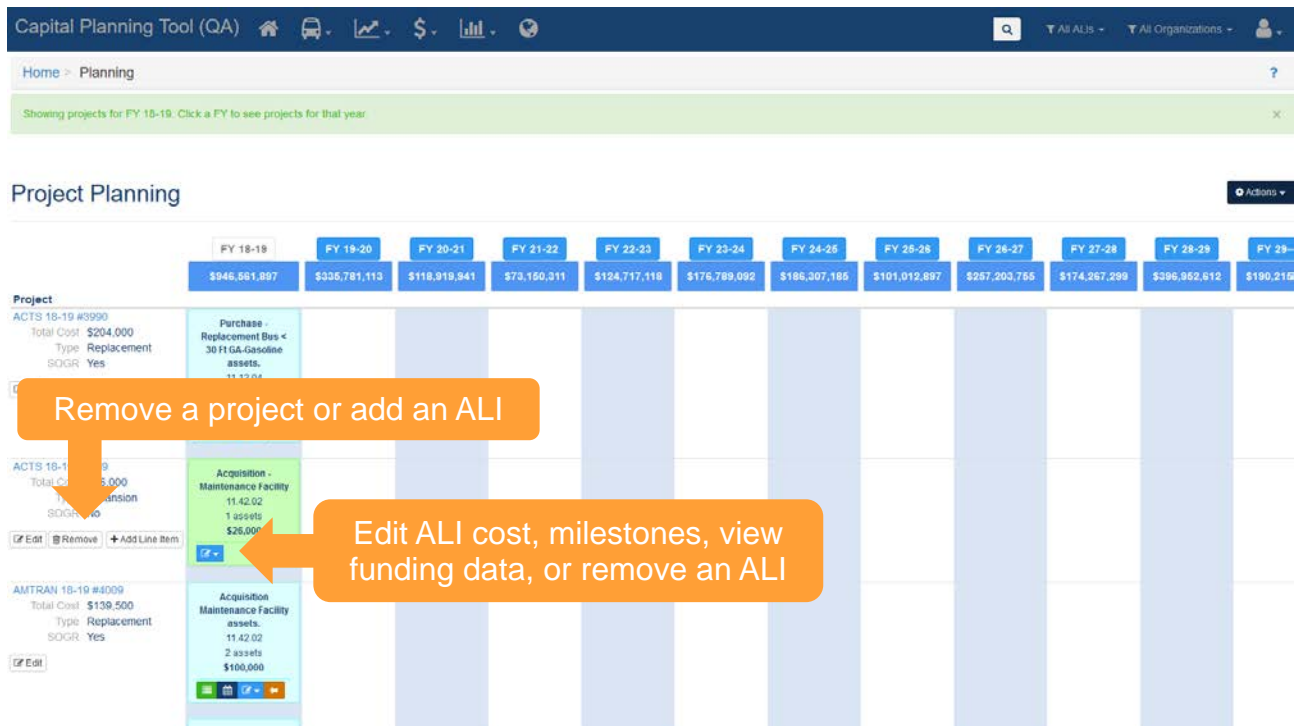
Users can filter ALIs for different years by clicking at the top of each column to bring the corresponding ALIs for that year to the top of the page. Users also can add a new manual capital project directly from the project planner as well as edit existing projects by clicking on the “Edit” button on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

**Figure 100 Project Planner Interface**

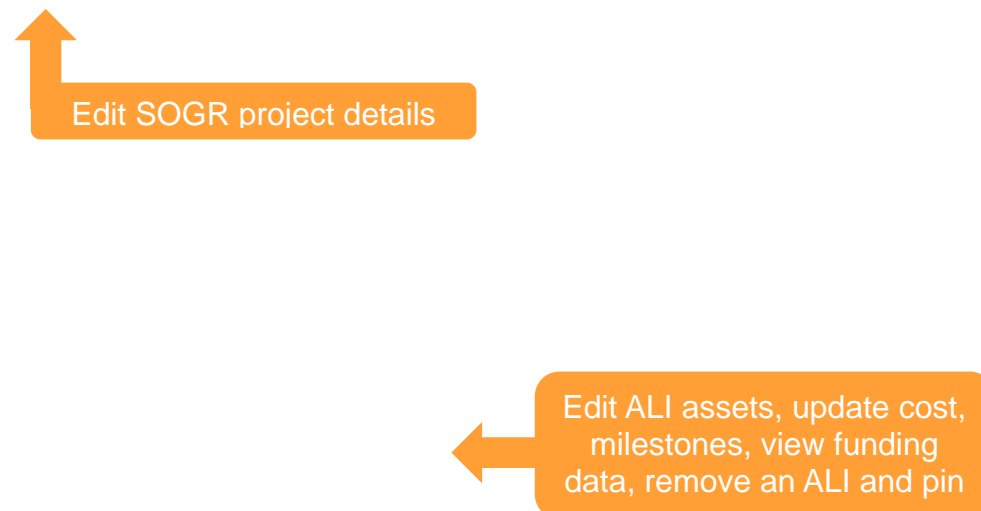


Both projects and ALIs within projects can be modified using multiple methods.

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

**Figure 101 Edit Manually Created Capital Projects**

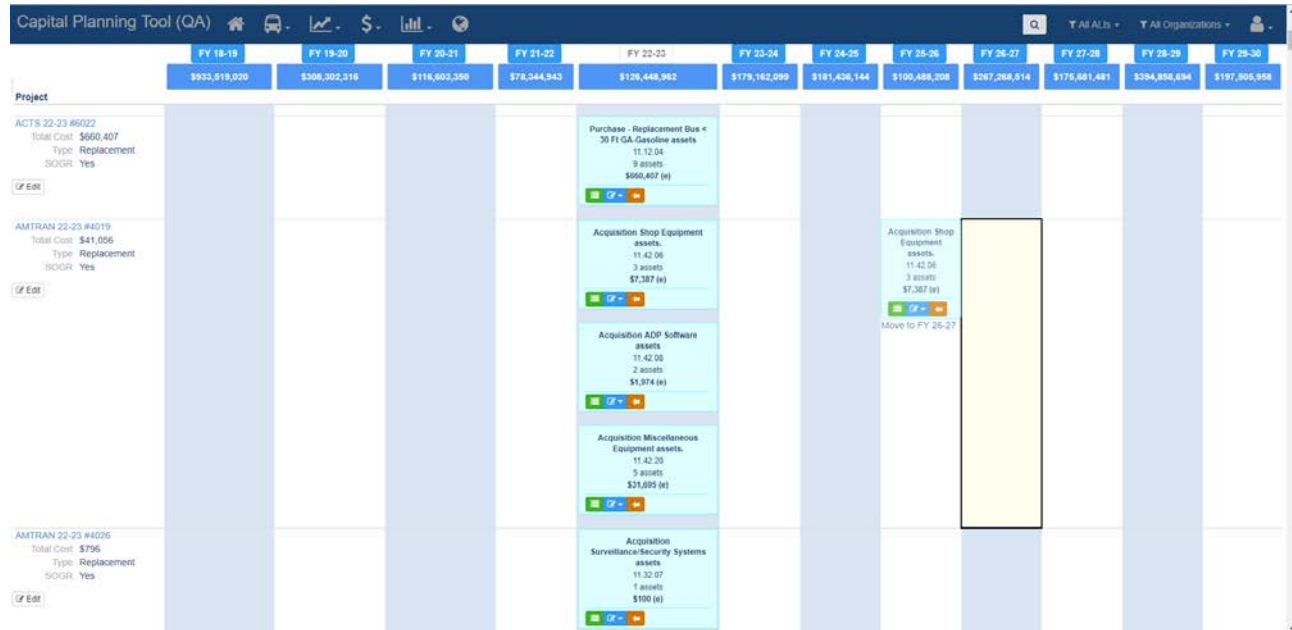
SOGR projects and ALIs include buttons and icons providing users the ability to view assets associated with the SOGR projects, remove the assets from the ALI or move the associated assets to a different year, edit cost, update milestones, view funding information and pin an ALI to the project planner.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

**Figure 102 Edit SOGR Capital Projects**



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

**Figure 103 Prioritize Projects**  
*Move ALIs to Different Years*



## 7.2 State of Good Repair (SOGR) Capital Project Analyzer

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

**Figure 104 Running SOGR Capital Project Analyzer**

The **SOGR Capital Projects Analyzer** analyzes the capital inventory for your organization and generates a set of replacement and rehabilitation capital projects which are added to the capital needs list. This analyzer uses your current **Policy** to determine when assets will be replaced and/or rehabilitated. Once the builder has completed, you will need to review each capital project and update:

- Description of the project
- Justification for the project

\* Organization

\* **Fta Asset Categories**

- ☒ Revenue Vehicles
- ☒ Equipment
- ☒ Facilities
- ☒ Infrastructure

\* Starting Fiscal Year

Run analyzer...

**Run Analyzer**

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

**Figure 105 SOGR Capital Project Analyzer Processing**

Capital Planning Tool (QA)

Home > Capital Projects

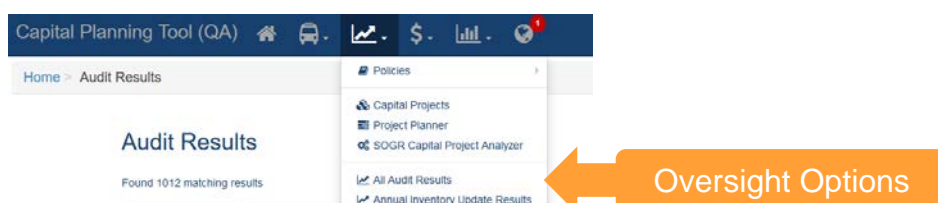
SOGR Capital Project Analyzer is running. You will be notified when the process is complete.

## 8.0 Oversight

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

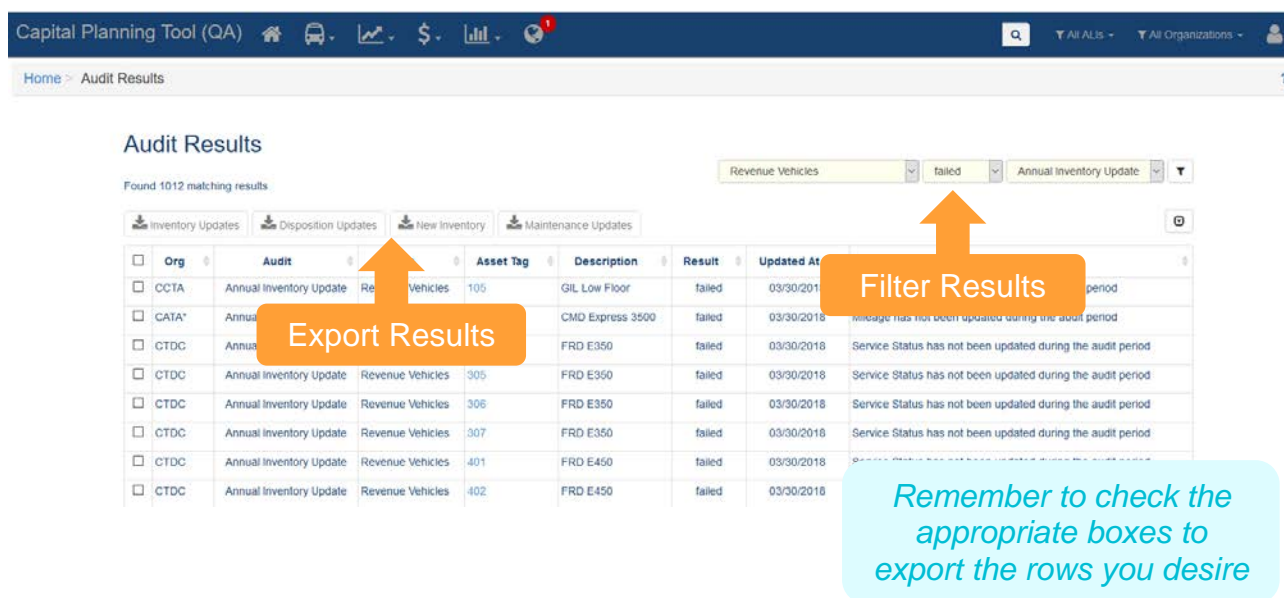
Clicking “All Audit Results” or “Annual Inventory Update Results” will bring you to an overview of the audit process.

**Figure 106 Oversight Options**



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

**Figure 107 Audit Results**





## 9.0 Funding

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

### 9.1 Programs

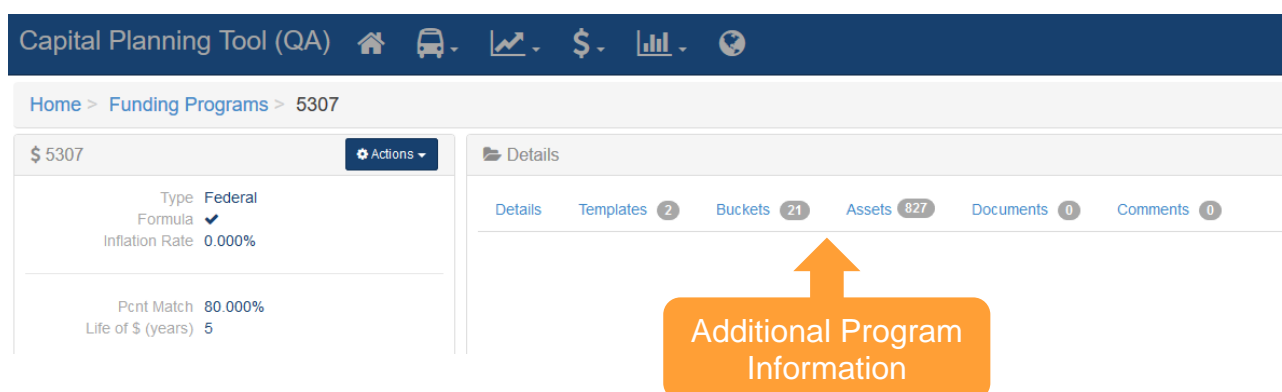
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

**Figure 108 Available Funding Programs**



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

**Figure 109 Funding Program Details**

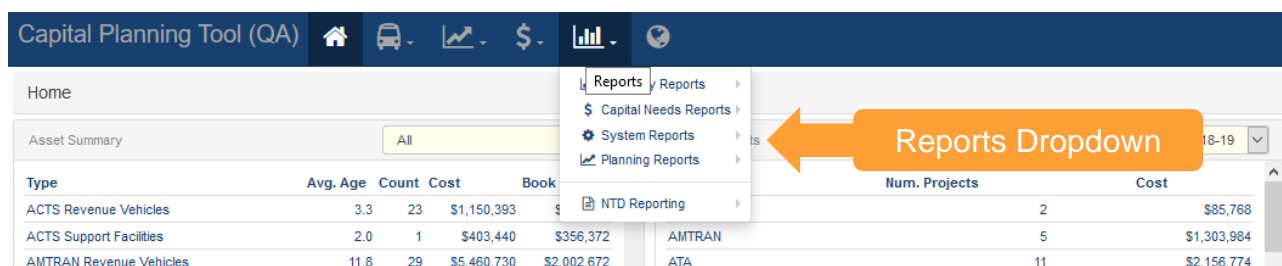




## 10.0 Reports

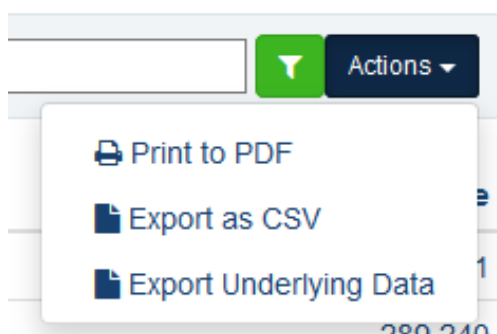
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

**Figure 110 Reports Dropdown**



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

**Figure 111 Report Exports**

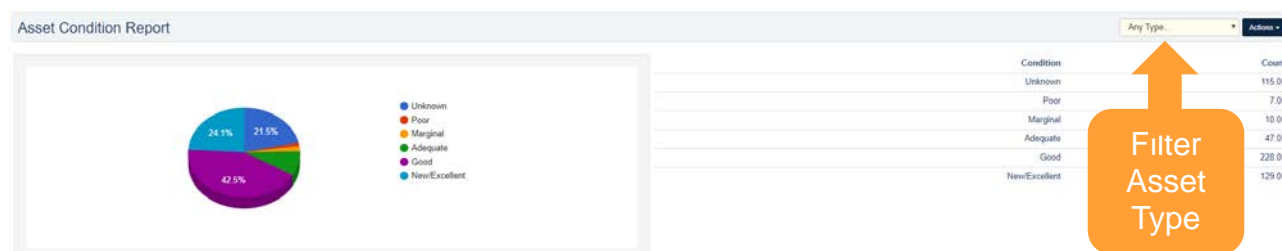


### 10.1 Inventory Reports

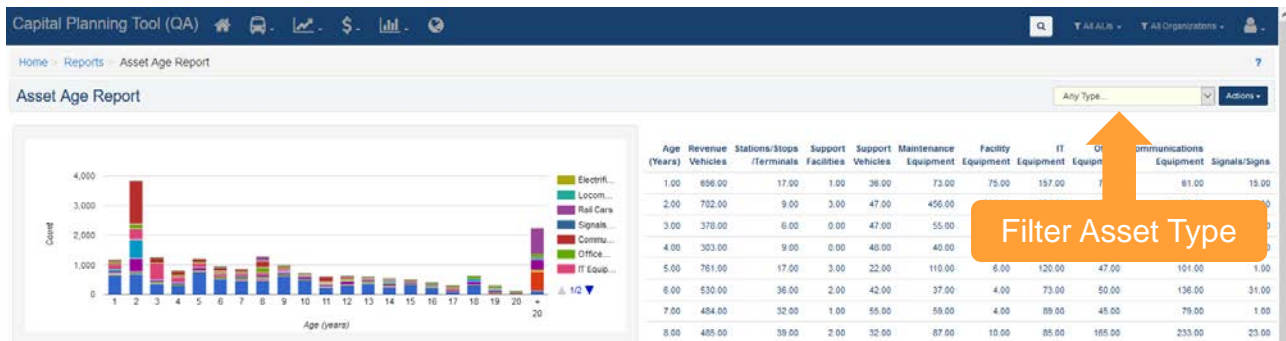
Inventory reports are a rollup of asset inventory data, including age, condition, and funding related calculations.

**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 Type.

**Figure 112 Asset Condition Report**



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

**Figure 113 Asset Age Report**

The Asset Funding Source Report computes for every funding program, organization (agency), and fiscal year, the number of assets that were purchased using a particular funding program as well as the cost 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, Fiscal Year.
- Funding Program, Agency.
- Funding Program, Agency, Fiscal Year.
- Funding Program, Fiscal Year.
- Funding Program, FY, Agency.
- FY, Funding Program.
- FY, Funding Program, Agency.

**Figure 114 Asset Funding Source Report**

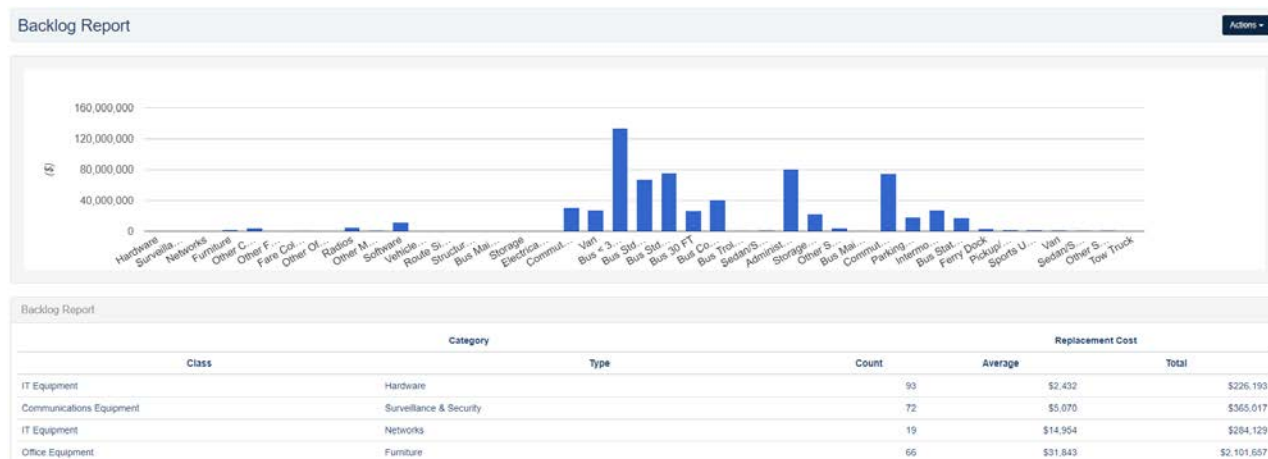
## 10.2 Capital Needs Reports

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 115 Backlog Report**



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

**Figure 116 Unconstrained Capital Projects Report**



## 10.3 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 pervious login of each user.

Figure 117 User Login Report

Capital Planning Tool (QA)						Q	▼ All ALJs	▼ All Organizations	?
Home > Reports > User Login Report									
User Login Report									Actions
Org	First Name	Last Name	Num Logins	Last Login	Acct Locked On				
BPT	Aaron	Wolff	276	01:36 PM 06/25/2018					
BPT	Andrew	Batson	72	02:03 PM 05/04/2018					
BPT	Anthony	Stever	163	10:01 AM 05/29/2018					
BPT	April	Fosmore	9	07:48 AM 10/19/2016					
BPT	BPT	User	4	02:11 PM 03/04/2016					
BPT	Colton	Brown	208	02:59 PM 06/20/2018					
BPT	Elizabeth	Bonini	311	03:26 PM 07/17/2018					
BPT	Eric	Ziering	20	11:36 AM 06/01/2015					
BPT	Ernie	Shank	183	03:53 PM 06/20/2018					
BPT	Ian	Pattamvua	15	06:49 AM 06/14/2018					

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

Figure 118 Issues Report

Capital Planning Tool (QA)										Q	▼ All ALJs	▼ All Organizations	?
Home > Reports > Issues Report													
Issues Report													Actions
ORGANIZATION	TYPE	DATE/TIME	COMMENTS	BROWSER TYPE	FIRST NAME	LAST NAME	PHONE	ISSUE STATUS	RESOLUTION	COMMENTS			
BPT	Bug	2015-06-10 19:20:41 UTC	When exporting vehicle information from the asset inventory to Excel, fields that have a symbol or check mark are blank in excel. For example, I selected 40ft vehicles and selected/deselected columns. When I exported to Excel, the ADA field (which was displayed as check marks in CPT) is blank for each asset.	Microsoft IE 11	Stephen	Panko	9 999 999 999 00	Open					
BPT	Bug	2015-06-12 16:46:05 UTC	On Wednesday June 10th Dana Moyer from STS reached out to me to request help updating the mileages for all of her vehicles. She said the every month they try to update the mileages for all of her vehicles and so I suggested she do a bulk/mass upload to make it easier. However, when we tried to download an inventory template we both were unable to do this (I ran into the "Ooops...there was an error" screen" but I'm not sure what Dana got). Shortly after I got off the phone with Dana I logged in to production and I was able to download the template. However, I haven't been able to get a hold of Dana since our discussion on Wednesday to see if it worked for her. I will keep trying to reach out to her to see if it she is able to download the template and do the mass upload thereafter.	Google Chrome	Patrick	Sosik	9 999 999 999 00	Open					
BPT	Bug	2015-06-19 11:42:17 UTC	Jeff Glisson of SCTA is attempting to add assets and getting the "Ooops Error 500 Application Error" From Jeff. "Yesterday and today for a couple of times, I have been unable to use the CPT to add the information on the two minivans. I logged in... clicked on Add Assets under inventory... clicked on Van Asset Type... clicked on Create New Asset... and received the attached error message."	Microsoft IE 11	Kyle	Eckert	717-772-5614	Open					

## 10.4 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 Vehicle Replacement Report finds and displays summary data for all revenue vehicles that are scheduled to be replaced within a fiscal year.

**Figure 119 Vehicle Replacement Report**

Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 18-19	Revenue Vehicles	Bus < 30 FT	472	\$3,881,401	\$34,064,976
FY 18-19	Revenue Vehicles	Bus 30 FT	18	\$972,478	\$4,006,775
FY 18-19	Revenue Vehicles	Van	189	\$332,474	\$7,668,659
FY 18-19	Revenue Vehicles	Sedan/Station Wagon	75	\$72,267	\$1,222,056
FY 18-19	Revenue Vehicles	Bus Std 35 FT	34	\$973,510	\$7,994,757
FY 18-19	Revenue Vehicles	Bus Std 40 FT	394	\$2,909,526	\$42,884,133
Totals for FY 18-19			1,182	\$9,141,666	\$97,923,366

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 Vehicle Replacement Report except it is not limited to revenue vehicles and rolls up values across all planning years.

**Figure 120 State of Good Repair Report**

Type	Sub Type	Count	Book Value	Replacement Cost
Revenue Vehicles	Bus Std 35 FT	27	\$2,212,738	\$5,739,747
Revenue Vehicles	Bus 30 FT	9	\$346,100	\$2,776,851
Stations/Stops/Terminals	Intermodal Terminal	74	\$19,143,700	\$27,574,857
Stations/Stops/Terminals	Parking Lot	2	\$11,687	\$68,854
Support Facilities	Bus Maintenance Facility	3	\$0	\$1,263,373
Support Facilities	Other Support Facility	2	\$1,100,902	\$2,000,520
Support Vehicles	Van	1	\$6,721	\$23,167
Support Vehicles	Sedan/Station Wagon	8	\$80,472	\$233,815
Support Vehicles	Pickup Truck	2	\$12,552	\$99,178

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 121 Disposition Report**

Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 17-18	Revenue Vehicles	Bus Std 35 FT	18	\$466,409	\$2,943,866
FY 17-18	Revenue Vehicles	Bus 30 FT	7	\$302,308	\$2,166,361
FY 17-18	Maintenance Equipment	Bus Maintenance Equipment	73	\$217,175	\$2,454,801
FY 17-18	Revenue Vehicles	Bus < 30 FT	20	\$57,253	\$1,335,937
FY 17-18	Revenue Vehicles	Bus Commuter/Suburban	6	\$738,880	\$4,493,528
FY 17-18	IT Equipment	Hardware	1	\$0	\$4,591
FY 17-18	Office Equipment	Other Office Equipment	1	\$0	\$5,399
FY 17-18	Revenue Vehicles	Van	4	\$0	\$67,021
<b>Totals for FY 17-18</b>			<b>132</b>	<b>\$1,782,025</b>	<b>\$13,471,504</b>

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 122 Asset Service Life Summary Report**

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

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 123 TAM Service Life Summary Report**

Capital Planning Tool (QA) All ALUs All Organizations 364

Home > Reports > TAM Service Life Summary Report

**TAM Service Life Summary Report** Asset Category Revenue Vehicles Years Past ULB Min  Years Past ULB Max  Actions

Organization	Asset Classification Code	Quantity	# At or Past ULB/TERM	Pct	Avg Age	Avg TERM Condition	g 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	2.00	212,607

Filter or Export



## 11.0 Specialized Reports

### 11.1 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 124 Asset Fleet Builder**

The screenshot shows the 'Capital Planning Tool (QA)' interface. At the top, there's a navigation bar with icons for Home, Fleets, Manage Fleets, and others. Below this, the 'Fleets' section is active, showing tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. Under 'Orphaned Assets', there's a filter bar with dropdowns for 'Any Asset Type', 'Tag/ID/VIN/Plate', 'Any Mfr...', 'Any Model', 'Year Mfr', 'Any Subtype', 'Any Vehicle Type', and 'Any Status'. Below the filter bar is a table with columns: Agency, Asset Type, Asset Tag, External ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. The table is currently empty with a 'Loading, please wait' message. Below the table is the 'Asset Fleet Builder' section. It contains a text box with instructions: '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.' Below this text box are two buttons: 'Build Revenue Vehicles Fleets' and 'Build Support Vehicles Fleets'. An orange callout box with the text 'Build Revenue or Support Fleets' and an arrow points to these buttons. A light blue note box in the top right corner states: 'Note: Running the Fleet Builder will delete all existing fleet data, if previously run.'

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 125 Asset Fleet Builder—Orphaned Assets**

The screenshot shows the 'Capital Planning Tool (QA)' interface. At the top, there's a navigation bar with icons for home, fleet, analytics, currency, and help. Below this, the 'Fleets' section is active, with tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is selected, and an orange arrow points from it to the 'Orphaned Assets' table. The table has columns for Agency, Asset Type, Tag, ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. There are four rows of data, each with an 'Add to Fleet' button. An orange arrow points from one of these buttons to the right. Above the table, there are filters for 'Any Asset Type', 'Year Mfd', 'Any Subtype', 'Any Vehicle Type', and 'Any Status'. The table data is as follows:

Agency	Asset Type	Tag	ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGB2713H3189913	-	GIL-Gill Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	+ Add to Fleet
CAT	Revenue Vehicles	#271	PT Bus #271	1FDFE4FS8HDC18987	-	FRD-Ford Motor Corporation	Champion				In Service	+ Add to Fleet
CAT	Revenue Vehicles	#272	PT Bus #272	1FDFE4FS8HDC18988	-	FRD-Ford Motor Corporation	Champion				In Service	+ Add to Fleet
CAT	Revenue Vehicles	#273	PT Bus #273	1FDFE4FSXHDC18992	-	FRD-Ford Motor Corporation	Champion	2017	Bus < 30 FT	CU-Cutaway	In Service	+ Add to Fleet

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.

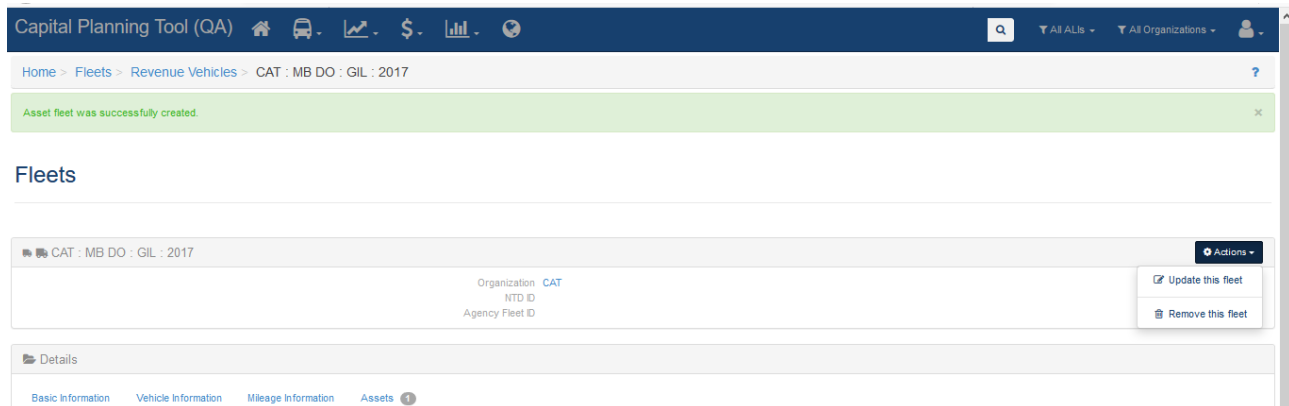
**Figure 126 Adding an Orphaned Asset to a Fleet**

The screenshot shows a modal dialog box titled 'Orphaned Asset'. It has two main sections: 'Add to Existing Fleet' and 'Create New Fleet'. The 'Add to Existing Fleet' section contains the text 'There are no fleets in the system that match this asset'. The 'Create New Fleet' section contains the text 'Click Save to create a new fleet based on this vehicle'. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'. The background shows a partial view of the 'Orphaned Assets' table from Figure 125.



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 127 Adding a New Fleet**



**Figure 128 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 129 Update Odometer Readings**

Capital Planning Tool (QA)

Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001

Fleets

AMTRAN : MB DO : GIL : 2001

Organization : AMTRAN  
NTD ID  
Agency Fleet ID

Details

Basic Information Vehicle Information Mileage Information Assets 2

Miles This Year 17-18  
Avg Lifetime Miles per Asset

Asset Tag	External ID	VIN	License Plate	Odometer Reading FY Start	Odometer Reading FY End	Mileage During FY	Last Odometer Value	Last Odometer Date
086560		15GGB221011072394		Record Mileage	Record Mileage		345,025	11/30/2017
086561		15GGB221311072406		Record Mileage	Record Mileage		35,366	11/30/2017

Showing 1 to 2 of 2 rows

**Figure 130 Remove or Add Assets from within a Fleet**

Capital Planning Tool (QA)

Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001

Fleets

AMTRAN : MB DO : GIL : 2001

Organization : AMTRAN  
NTD ID  
Agency Fleet ID

Details

Basic Information Vehicle Information Mileage Information Assets 1

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		35366	Yes	✖
086560		15GGB221011072394			In Service	No	No		345025	Yes	+

Showing 1 to 2 of 2 rows

## 11.2 NTD Asset Reports

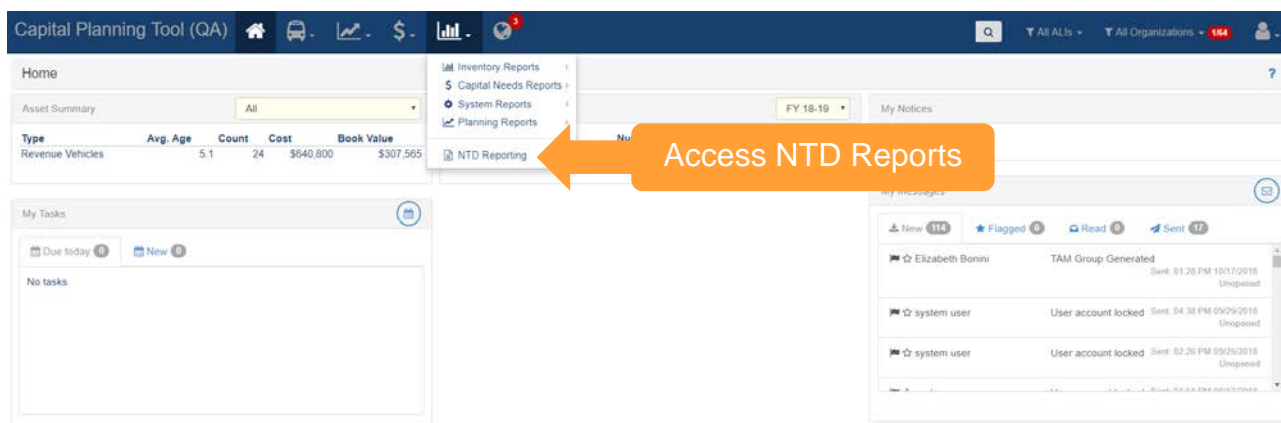
The NTD Asset Reports are forms that must be submitted on an annual basis for every organization that receives Federal public transit funding. Required forms differ between organization, based on the category of assets in operation for each organization. The specific forms are as follows:

- 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.

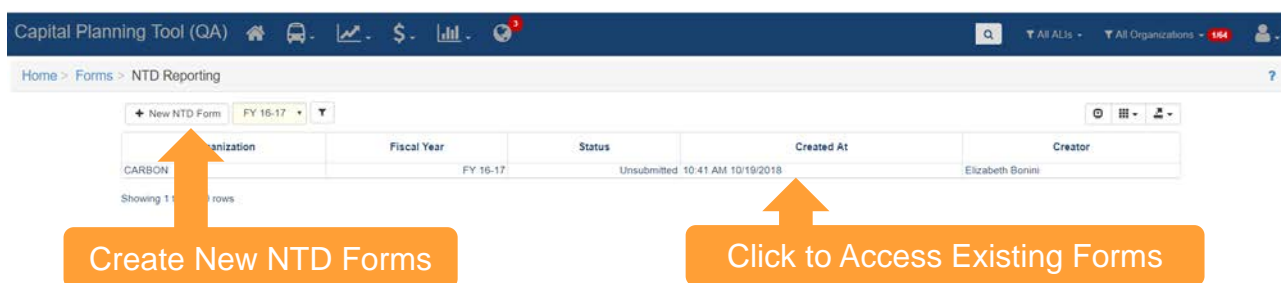
Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

**Figure 131 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 132 Table of Previously Generated NTD Reports**



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

**Figure 133 Create New Reporting Year Forms**

Capital Planning Tool (QA)

Home > Forms > NTD Reporting > New

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: 999999999 Reporter Phone Ext:

Save NTD Form

Click Save NTD Form Button

© 2013-2016 Cambridge Systematics Help Build 2.3.2-eb1 Powered by TransAM Ver 2.3.12

**Figure 134 NTD Report Details and Data**

Capital Planning Tool (QA)

Home > Forms > NTD Reporting > CARBON FY 16-17

CARBON FY 16-17

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

Actions:

- submit this form
- New version
- Remove this form

Details

Versions History

Date	Creator	Download	Comments	Process Log
10:41 AM 10/19/2016	Elizabeth Bonini	Unsubmitted		

Submit, Create a New Version, or Remove

Access Forms or Add a Comment

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

**Figure 135 Download each NTD Form**





## 12.0 Admin Tools

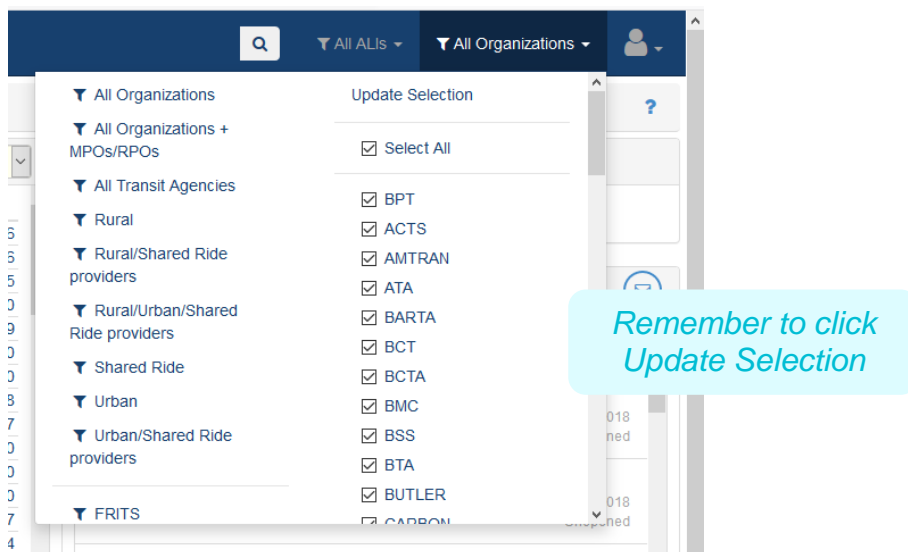
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

**Figure 136 Admin User and Organization Options**



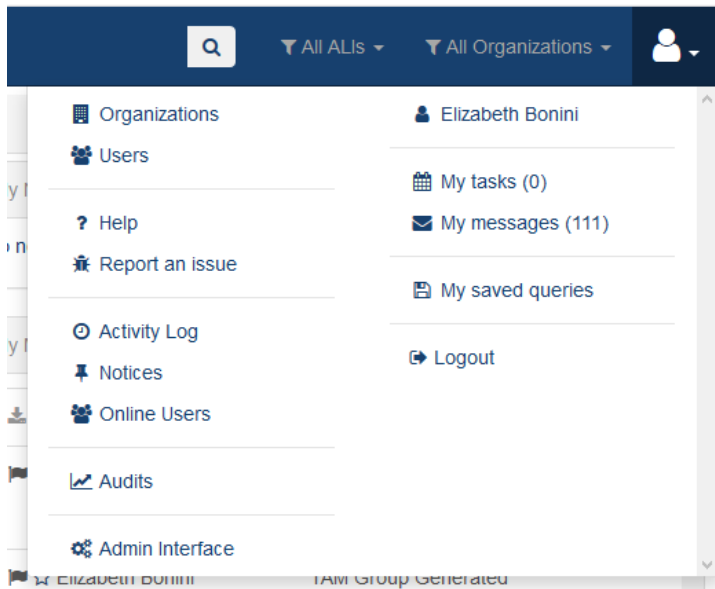
Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

**Figure 137 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.

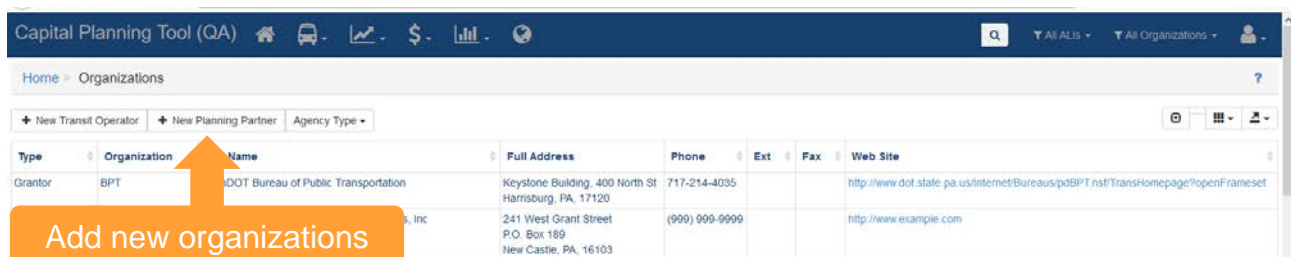
**Figure 138 Admin User Options**



## 12.1 Organizations

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

**Figure 139 Admin Organizations**





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

**Figure 140 Add an Organization**

Capital Planning Tool (QA)

Home > Organizations > New

**Corporate**

\* Name

\* Acronym

External ID

Governing Body Type

Governing Body

Indian Tribe

FTA Recipient ID

NTD ID Number

\* Agency Type

**Contact**

\* Phone

Fax

\* Url

\* Address 1

Address 2

\* City

\* State

\* Zip

\* Allowed Email Domains

To enter more than one domain, separate with |

**Services**

**Services Provided**

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

\* Service Area

**Locations Served**

PennDOT District 1 (District)

PennDOT District 2 (District)

## 12.2 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 141 Admin Users**

Capital Planning Tool (QA)

Home > Users

+ Add a user

Any role/privilege...

INITIALS/FIRST/LAST/EMAIL/TITLE

Show Active Users Only

Search

Organization	Title	First	Last	Email	Phone	Role	Privileges	Num Logins	Last Login	Locked	Active	Created At
BPT		Nicholas	Baldwin	nbaldwin@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@mbakernti.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

Filter and add new users

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

**Figure 142 Add a User**

**New User**

User Organizations

\* Organization

\* Organizations

Not Selected

Selected

Search

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

Choose All >

Roles & Privileges

\* User Role

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*

## 12.3 Notices

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

**Figure 143 Notices**

**Capital Planning Tool (QA)**

Home > 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 12/29/2017	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

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

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

**Figure 144 Add a Notice**

The screenshot shows the 'New Notice' form. It includes a dark blue header with navigation icons and a search bar. The form fields are as follows:

- Subject:** A text input field.
- Summary:** A text input field.
- Details:** A large text area for additional information.
- Organization:** A dropdown menu currently set to 'All'.
- Start Displaying:** A date and time selector set to '07/20/2018' at '12:00 PM'.
- Stop Displaying:** A date and time selector set to '07/20/2018' at '11:00 PM'.
- Notice Type:** A dropdown menu currently set to 'System Notice'.
- Create Notice:** A blue button at the bottom of the form.

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

**Figure 145 Notice on the Dashboard**

The screenshot shows the dashboard interface. At the top is a dark blue header with a search bar, filters for 'All ALIs' and 'All Organizations', and a user profile icon. Below the header is a light gray sidebar with a list of numbers (9, 536, 786, 775, 280, 222) and a 'My Messages' section with an envelope icon. The main content area is titled 'My Notices' and displays a single notice:

- Notice:** A red warning triangle icon followed by the text 'test'.
- Timestamp:** '12:00 AM 07/20/2018'.
- Action:** A blue link labeled 'Details...'.

## 12.4 Online Users

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

**Figure 146 Active Users**

Capital Planning Tool (QA) All Alls + All Organizations +

Home > Users

### Active User Sessions

Session Id	User	IP Addr	Organization	Started	Expires	Age	Last View Time	Inactive Time	View Count	Last View
fa72aad073b752943b71b731d54dc10	Elizabeth Bonini	74.75.225.136	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
5eeba2509d607833bd955f9b5bb756f	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
97ce63ac5f8ab1dbf396ec91b4f5c38	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
17c2ba3fc8b599e3924b1236a7216191	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
09baecbbd50cc11679481d1102bf252	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
2b1536d075759fa78ed6a18377a0924a	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
09fe1e7c64c4f95a8bfeff3d4496923d	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

## 12.5 Audits

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

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

**Figure 147 Admin Audits Page**

Capital Planning Tool (QA) All Alls + All Organizations + 184

Audits

Audits

Found 1 matching audits

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

BUTLER

Users

Help

Report an issue

Activity Log

Notices

Online Users

Audits

Interface

Elizabeth Bonini

My tasks (0)

My messages (114)

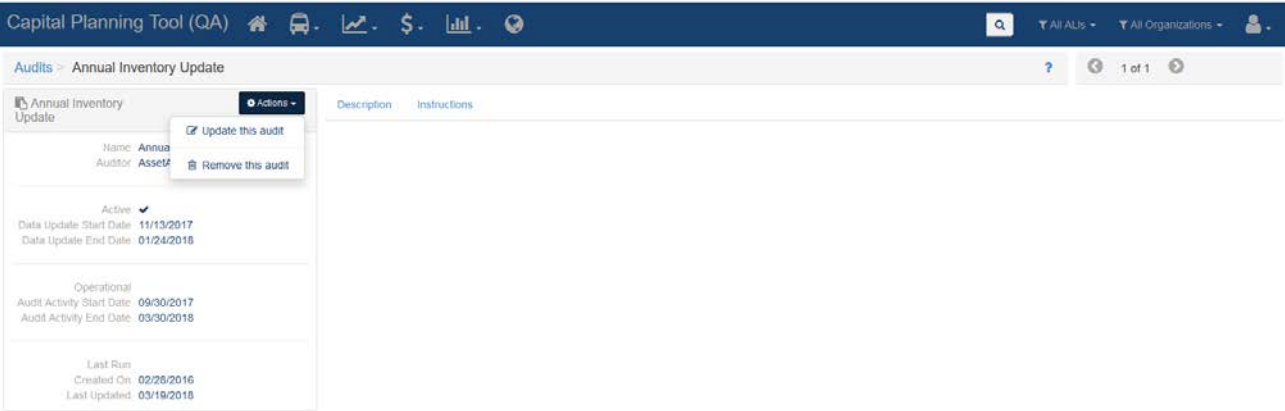
My saved queries

Logout

Admin Audits Page

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

Figure 148 Admin Audits Details Page



## 12.6 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 149 Admin Interface**

