

TransAM

General User

User Guide

prepared for

Orange County Department of Planning (OCDP)

prepared by

Cambridge Systematics, Inc.

user guide

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prepared by

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date

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1.0 Welcome!

TransAM is an asset management system designed to support the needs of State DOTs, Planning Agencies, and Transit Agencies. The system manages assets of all types, including revenue vehicles, equipment, facilities, and infrastructure. The system stores crucial information about every asset category and maintains a complete history of the asset as it ages, including; changes in condition, usage, value/depreciation, and other lifecycle events are, that are recorded and can be reviewed at any time. A variety of reports can be generated on asset condition, value, and capital replacement needs.

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

1.1 Initial Log In and Password Reset

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

Figure 1 Password Reset Request Screen

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

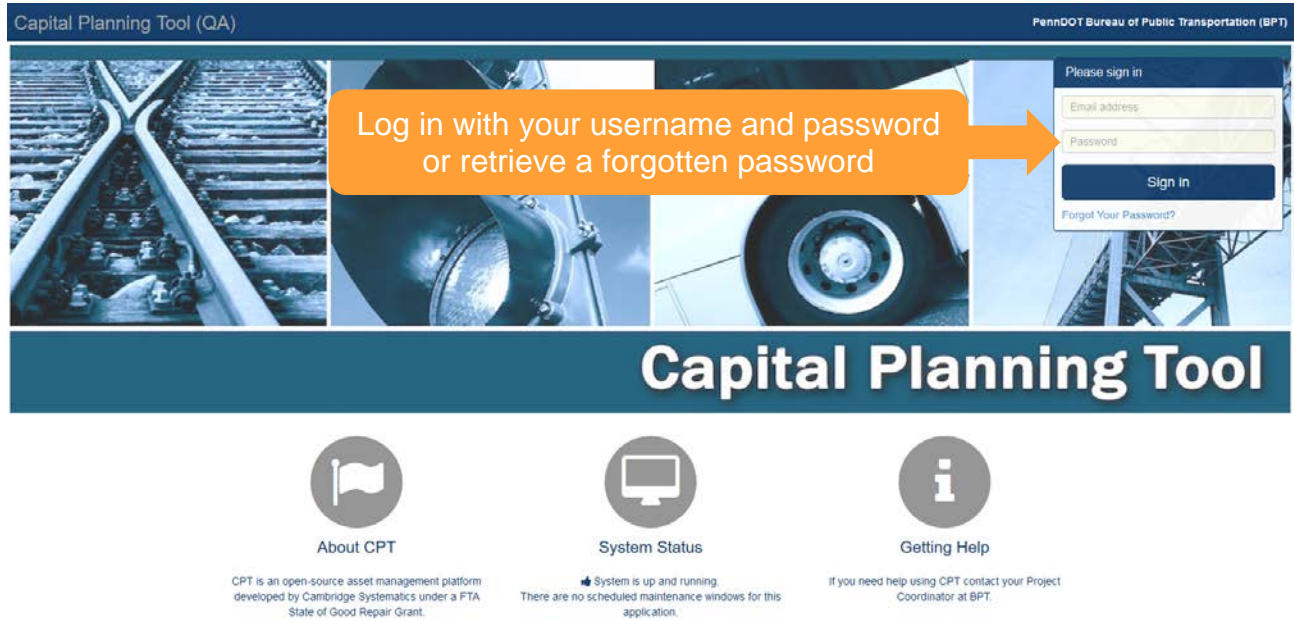
Change my password

1.2 Ongoing Site Access

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

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

Figure 3 Login Screen



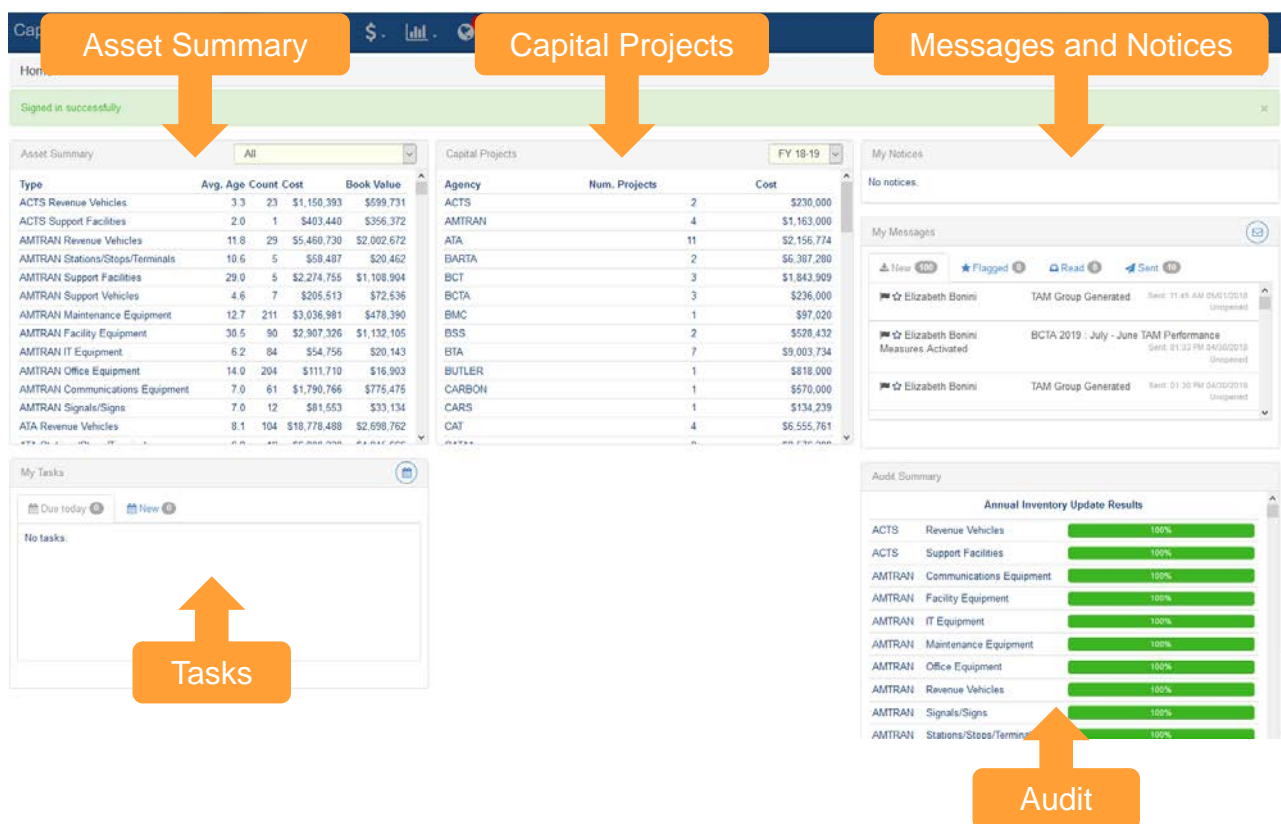
2.0 Dashboard

2.1 Dashboard Elements

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

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

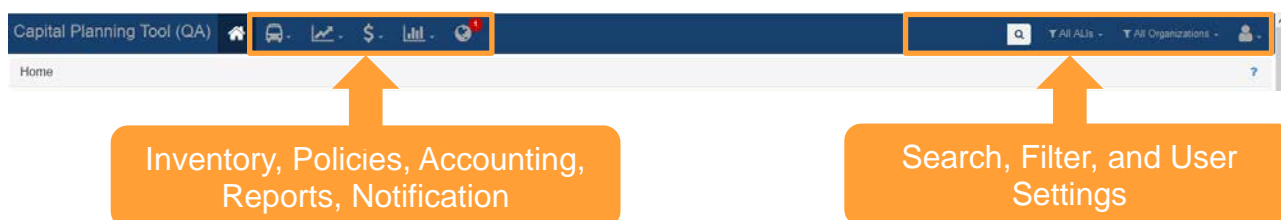
Figure 4 Dashboard Elements



2.2 Header Menu and Controls

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

Figure 5 Header Menu



3.0 General Features and Tools

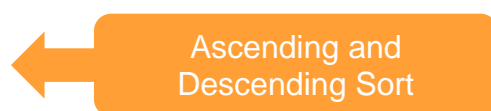
As you progress through the system, there are some common interface elements that you'll encounter often.

3.1 Table Controls

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

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

Figure 6 **Sorting Controls**



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

Figure 7 **Export Button**

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

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

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

Figure 8 **Table Tools**



3.2 Site Filters

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

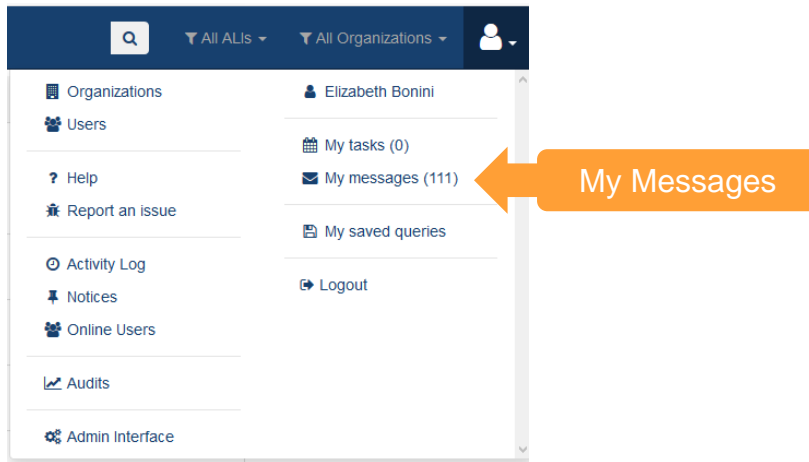
Figure 9 **Filter Icon**



3.3 Messages

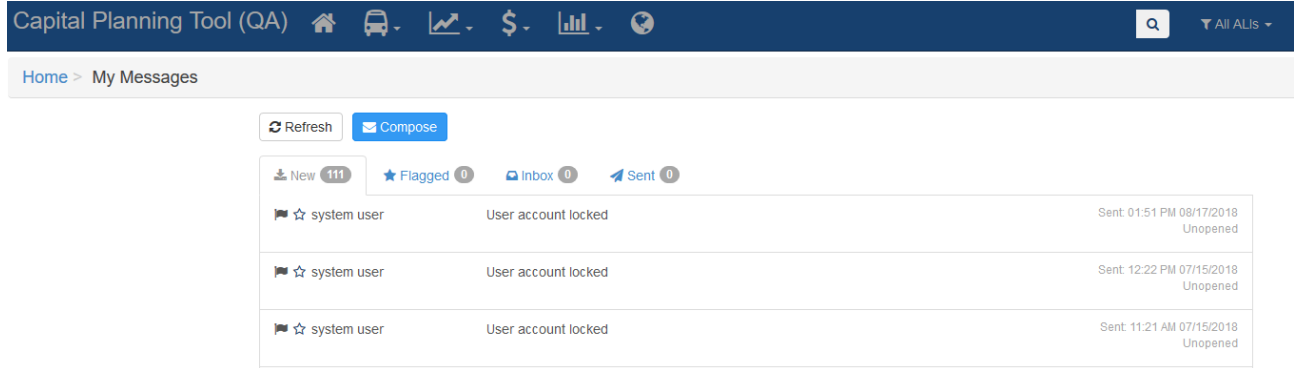
You can access Messages through the User Profile drop down menu.

Figure 10 **User Profile**
Messages



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

Figure 11 **Messages**



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 x T Ω

Message Body

Send...

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

Scope

Project Location

Asset Type

Asset Subtype

☐ In Backlog

Owner

Funding

☐ Not fully funded

Update ALI Filter Update and Select This Filter

3.4 Organizations Filter

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

Figure 13 Organization Filter

Capital Planning Tool (QA)

Search

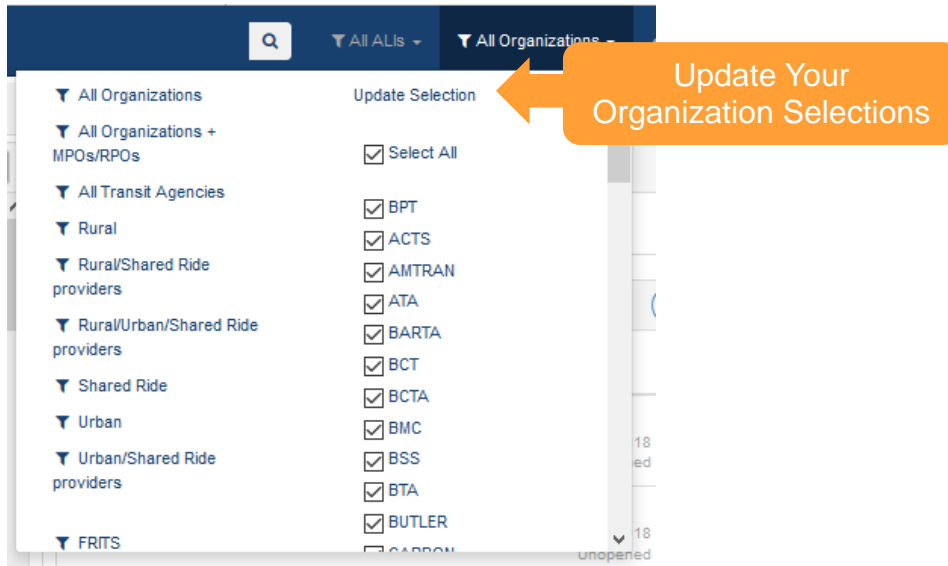
All ALIs

All Organizations

Organizations Filter

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

Figure 14 Organization Filter Selections



3.5 Search

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

Figure 15 Search Box



3.6 User and Organization Options

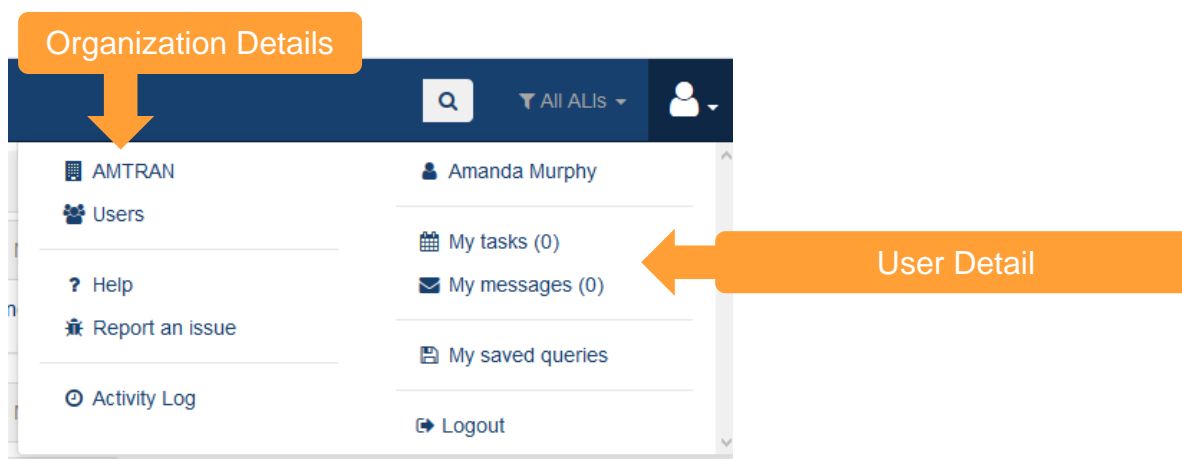
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

Figure 16 User Menu



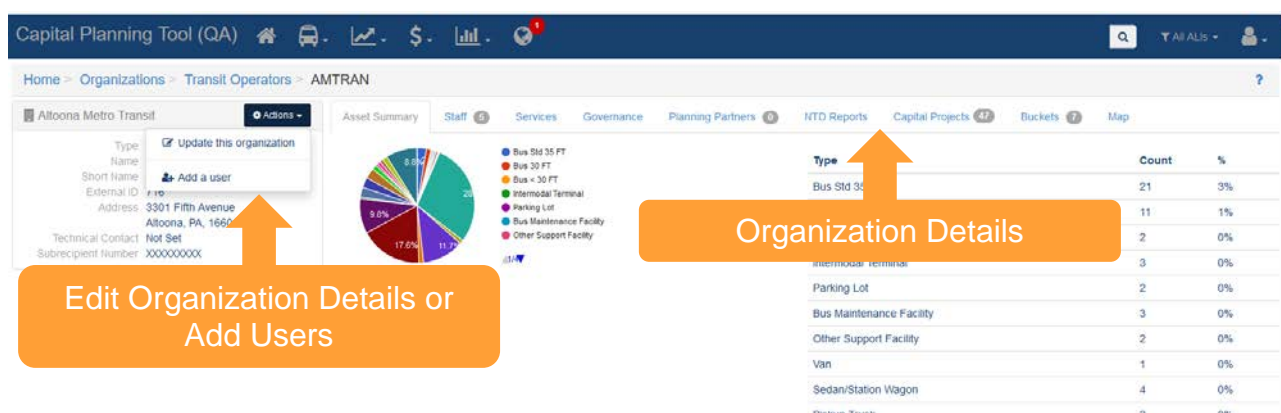
From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

Figure 17 User Menu Dropdown

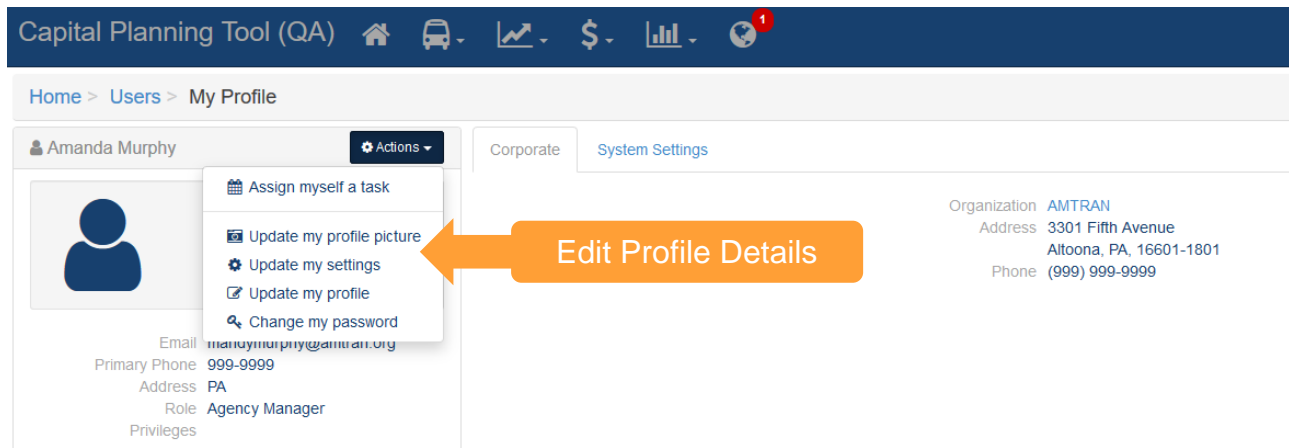


Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

Figure 18 Organization Details



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

Figure 19 Profile Details

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

Figure 20 Report an Issue

Report an Issue

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

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

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

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

* Issue Type

* Web Browser Type

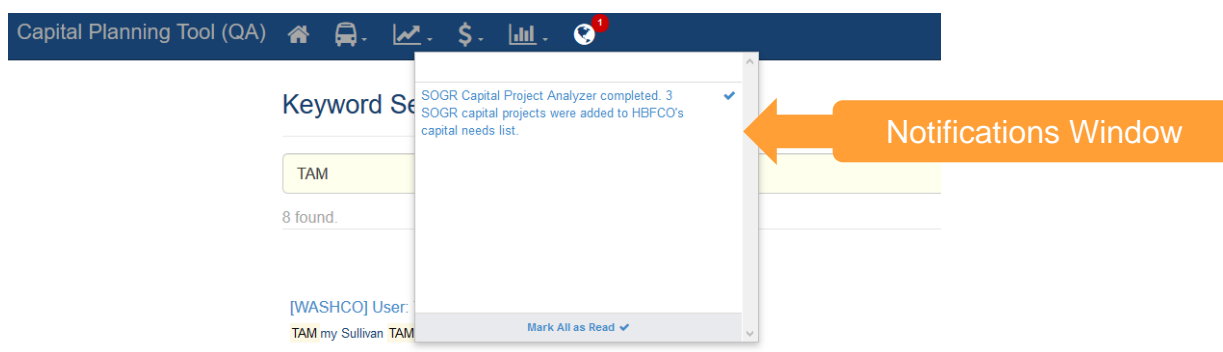
* Comments

Please provide as much detail as you can...

Create Issue

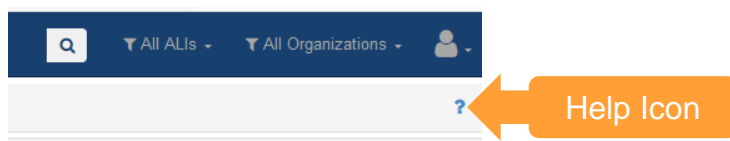
3.7 Notifications

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

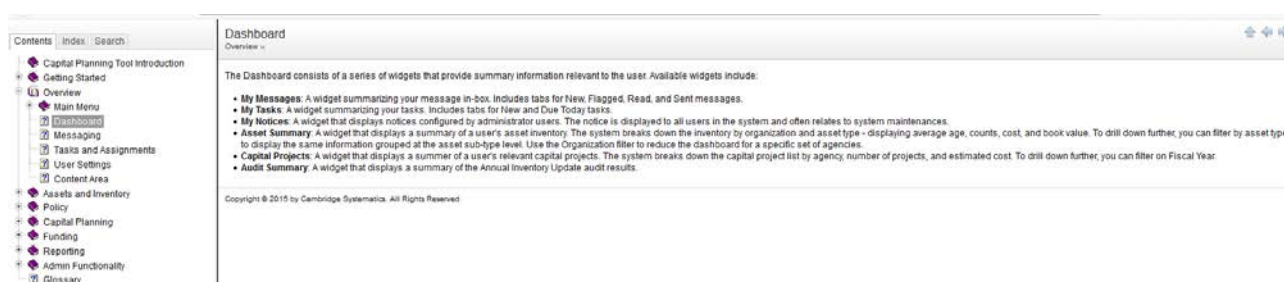
Figure 21 Notification Drawer

3.8 Help

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

Figure 22 Help Icon

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

Figure 23 Help Content

4.0 Asset Inventory

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

Figure 24 **Asset Inventory Dropdown**



4.1 Add an Asset

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

Figure 25 Adding an Asset

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

Figure 26 Select the Organization and Asset ClassA screenshot of a web application interface. At the top is a dark blue header bar with the text "Capital Planning Tool (QA)" and several icons: a home icon, a bus icon, a line graph icon, a dollar sign icon, a bar chart icon, and a globe icon. Below the header is a light gray breadcrumb trail showing "Home > Add Asset". The main content area is titled "New Asset" and contains two dropdown menus. The first is labeled "* Organization" and has a yellow background with the text "Select organization...". The second is labeled "* FTA Asset Class" and also has a yellow background with the text "Select asset class...". Below these two dropdowns is a dark blue button with the text "Create New Asset" in white.

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

Figure 27 Adding Asset Required Details

Capital Planning Tool (QA)

Home

Required Fields Recommended Fields

Organization

* Organization
Attoona Metro Transit

Service Status

* Service Status

Identification & Classification

* Vehicle Identification Number (VIN)

* Asset ID

* Class
Buses (Rubber Tire Vehicles)

* Type

* Subtype

* Estimated Service Life (ESL) Category

Characteristics

* Manufacturer

Manufacturer (Other)

* Model

Model (Other)

* Year of Manufacture

* Fuel Type

Fuel Type (Other)

Dual Fuel Type

* Length

* Length Units

* Seating Capacity (ambulatory)

Any field on the required tab must be filled out

Figure 28 Add the Asset and Go To The New Record

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

* Seating Capacity (ambulatory)

* Standing Capacity

* ADA Accessible
☐ Yes ☒ No

Operations

* 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 29 Existing Assets

Capital Planning Tool (QA)

Home

Asset Summary

Type	Avg. Age	Value	Agency	Num. Projects
ACTS Revenue Vehicles	2.3		ACTS	
ACTS Support Facilities	2.0		AMTRAN	
ACTS Guideway	0.0		ATA	
ACTS Power & Signal	0.0		BARTA	
ACTS Track	0.0		BCT	
AMTRAN Revenue Vehicles	12.0		BCTA	
AMTRAN Stations/Stops/Terminals	11.0		BMC	
AMTRAN Support Facilities	29.4		BSS	
AMTRAN Support Vehicles	4.9		BTA	
AMTRAN Maintenance Equipment	12.9		BUTLER	
AMTRAN Facility Equipment	30.2		CARBON	
AMTRAN IT Equipment	6.6		CARS	
AMTRAN Office Equipment	14.1		CAT	
AMTRAN Communications Equipment	7.5		CATA*	
AMTRAN Signals/Signs	6.8		CCTA	
AMTRAN Guideway	0.0		CHESSR	
AMTRAN Power & Signal	0.0		CLARCO	
AMTRAN Track	0.0		CNTRO	

My Tasks

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

Figure 30 Existing Asset Interface

Capital Planning Tool (QA)

Home > Revenue Vehicles > Buses (Rubber Tire Vehicles)

Revenue Vehicles

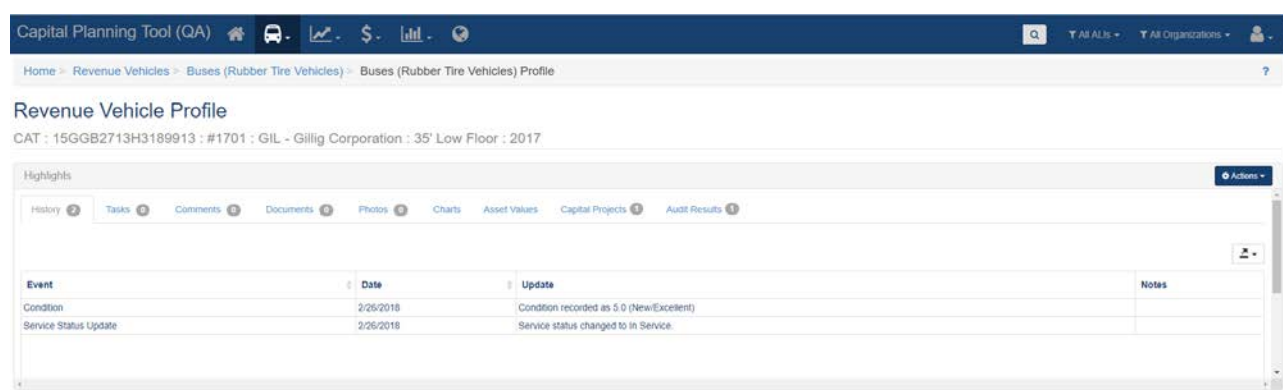
All Buses (Rubber Tire Vehicles)

Export All

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GGB2713H3189913	GL - Glig Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFA4F56HDC18967	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFA4F56HDC18968	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFA4F56HDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFA4F56HDC18990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFA4F56HDC18991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFA4F56HDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFA4F56HDC18993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFA4F56HDC18994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFA4F56HDC18995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFA4F56HDC18996	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFA4F56HDC18997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFA4F56HDC18998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#600	LCTA	15GGB3111J3190014	GL - Glig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#601	LCTA	15GGB3111J3190015	GL - Glig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#602	LCTA	1FDFA4F56HDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
#603	LCTA	1FDFA4F56HDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GGB201621111850	GL - Glig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GGB201731111860	GL - Glig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GGB201031111880	GL - Glig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GGB201431111896	GL - Glig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F1185791	GL - Glig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2715F1185793	GL - Glig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

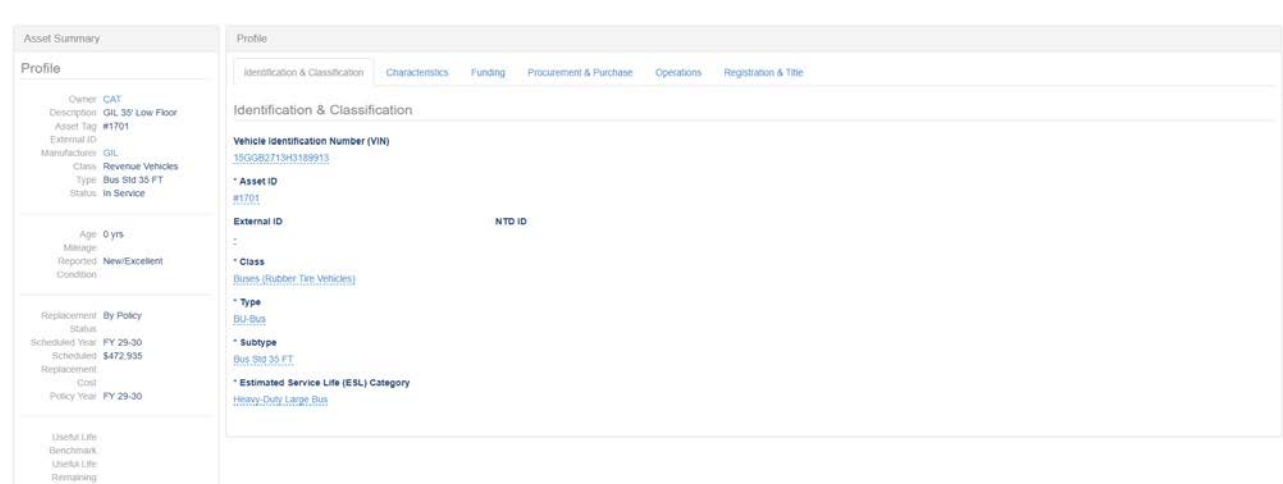
When you access the specific asset record, users can view the highlights section. The highlights sections contains asset summary information such as: a history log, location information, asset charts, asset value information, associated capital projects, and audit results. In addition, tasks, comments,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

Figure 31 Asset Record: Highlights



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

Figure 32 Asset Record: Profile and Summary



4.3 Editing or Updating Existing Asset Profile Data

Editing asset profile data allows users to modify core attributes that are not expected to change, but corrections may be necessary from time to time. Profile data can be modified by clicking on the 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 33 Editing the Profile of an Existing Asset

Capital Planning Tool (QA)

Service status update 2/26/2018 Service status changed to In Service.

Remove this asset

Asset Summary

Profile

Owner: CAT
Description: GIL 39' Low Floor
Asset Tag: #1701
External ID: GIL
Manufacturer: GIL
Class: Revenue Vehicles
Type: Bus Std 35 FT
Status: In Service

Age: 0 yrs
Mileage: New/Excellent
Reported: Condition

Replacement: By Policy
Status: FY 29-30
Scheduled Year: FY 29-30
Replacement: \$472,935
Cost: FY 29-30
Policy Year: FY 29-30

Useful Life: Benchmark
Useful Life: Remaining

Profile

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

Identification & Classification

Vehicle Identification Number (VIN)
15GG82713H3189913

* Asset ID
#1701

External ID
NTD ID

* Class
Buses (Rubber Tire Vehicles) [X]

* Type
BLI-Bus

* Subtype
Bus Std 35 FT

* Estimated Service Life (ESL) Category
Heavy-Duty Large Bus

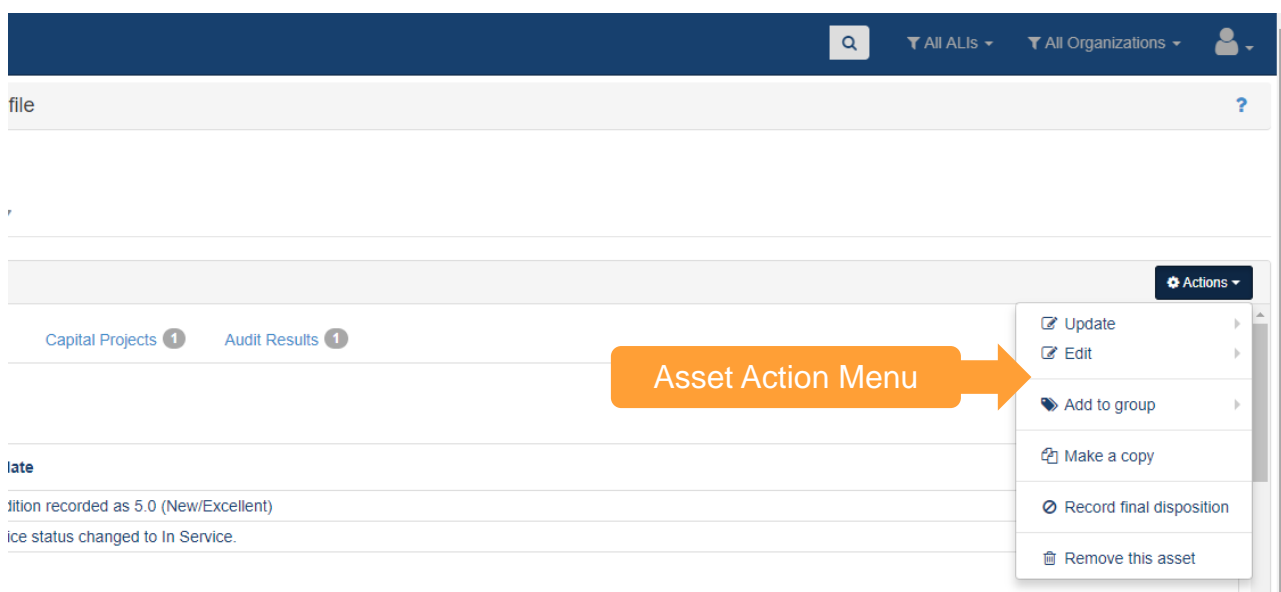
Click on a field to edit

4.4 Updating Existing Asset Lifecycle Data

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

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

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

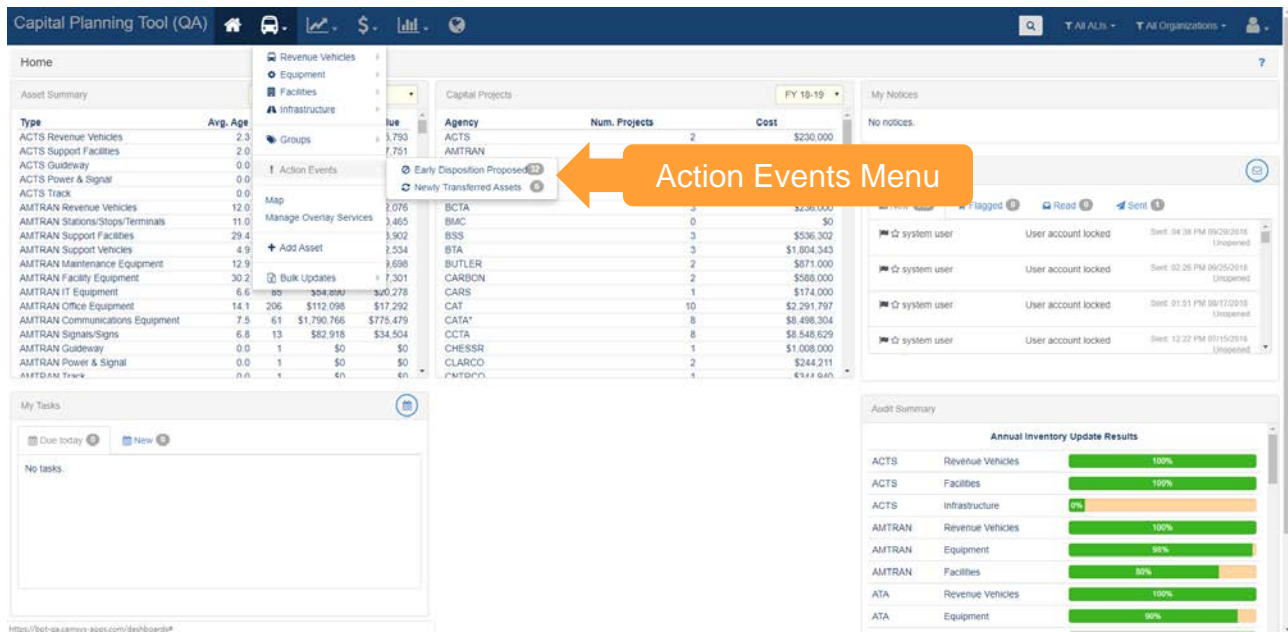
Figure 34 Updating the Lifecycle of an Existing Asset

4.5 Action Events (Disposition and Transfer Review)

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

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

Figure 35 Asset Action Events (Disposition and Transfer)

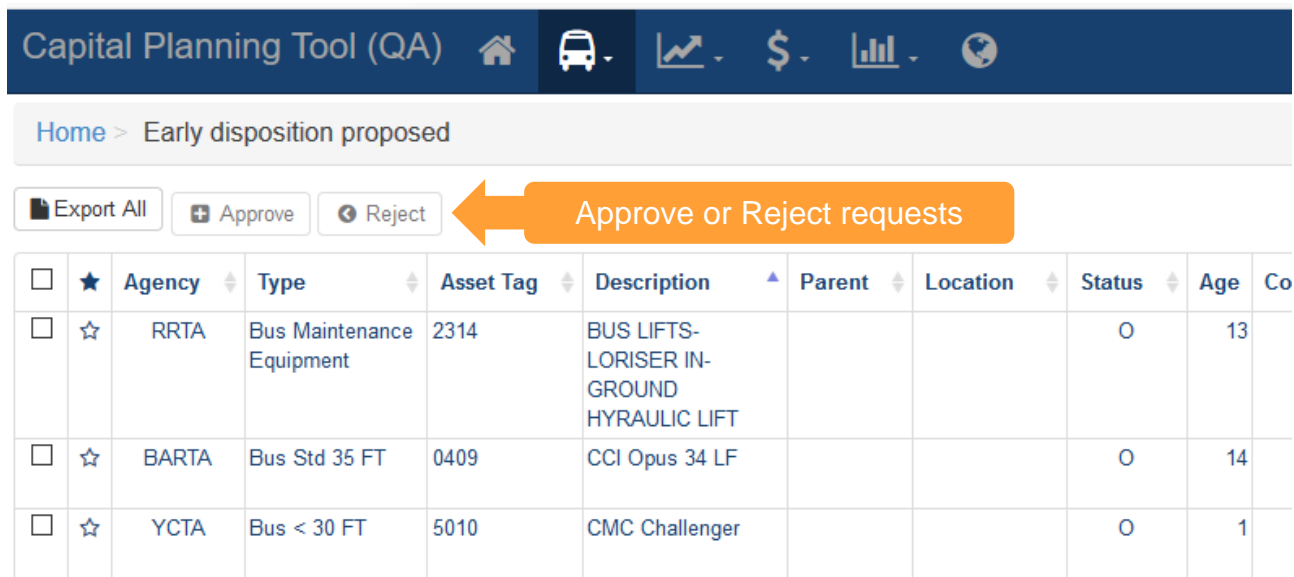


An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

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 36 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 37 Bulk Updates



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

Figure 38 Bulk Update Tools

Capital Planning Tool (QA)      							
Home > Bulk Updates							
<div>    </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		

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.”

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

Figure 42 Bulk Update Upload

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... cata_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 43 Bulk Upload Processing

Capital Planning Tool (QA)

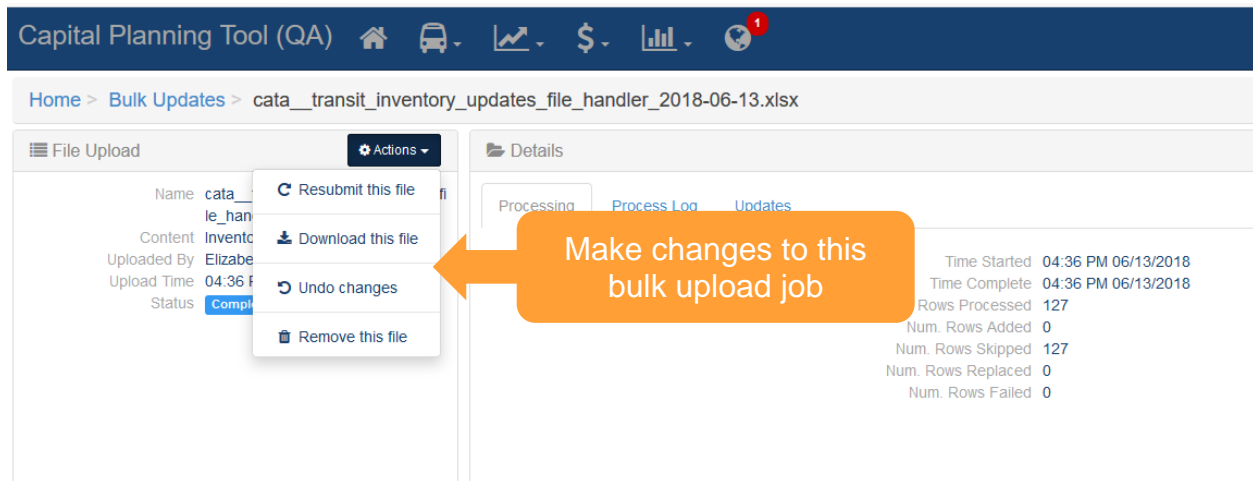
Home > Bulk Updates

File was successfully uploaded.

Create a new Template Upload a Template Filter Status

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

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

Figure 44 Bulk Update Edit







4.7 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 45 Asset Groups

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

Figure 46 Adding an Asset to a Group








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  Tasks  Comments  Documents  Photos  Charts Asset Values Capital Projects  Audit Results 

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.

Add an Asset to a Group → Buses that are 35ft in length

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

Asset Summary

Profile

Owner: 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

Profile

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

Identification & Classification

Vehicle Identification Number (VIN)
15GGB2713H3189913

* Asset ID
#1701

External ID
NTD ID

https://opt-qa.camsys-apps.com/inventory/15GGB2713H3189913

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 47 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. On the left, the 'Asset Summary' section displays a table with columns: Type, Avg. Age, Count, and Cost. The table lists various asset types such as ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, and AMTRAN Stations/Stops/Terminals. On the right, the 'Capital Projects' section displays a table with columns: Agency, Num. Projects, and Cost. The table lists agencies such as ACTS, AMTRAN, BARTA, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CARS, and CAT. An orange arrow points to the 'Policies' option in the dropdown menu.

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 48 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. On the left, the 'Home > Policies' section displays a table with columns: Policy Name, Description, and Action. The table lists two policies: Asset Replacement/Rehabilitation Policy and TAM Policy. On the right, the 'Policy Rule Sets' section displays a table with columns: Policy Name, Description, and Action. The table lists two policy rule sets: Asset Replacement/Rehabilitation Policy and TAM Policy. An orange arrow points to the 'TAM Policy' option.

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 49 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 sections: Home, Asset Summary, and My Tasks. The Asset Summary section displays a table of asset types and their associated costs. The My Tasks section shows a list of tasks with their respective due dates.

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	\$2,330,000
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

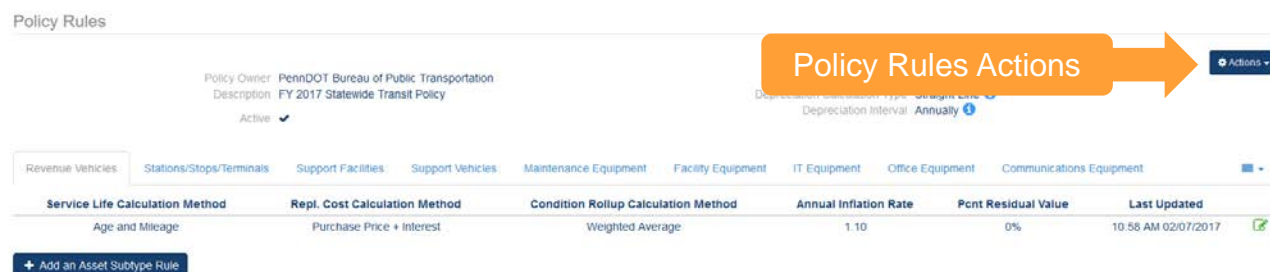
Use the organization filter dropdown to choose the correct organization. You will then need to select the policy year that you wish to work with. Pressing the Filter Button will display the policy rules for the organization and policy year that you have chosen.

Figure 50 Asset Replacement/Rehabilitation Policy Filters

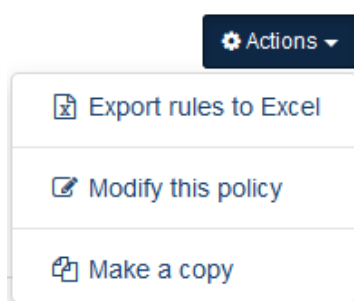
The screenshot shows the Capital Planning Tool (QA) interface with the Asset Replacement/Rehabilitation Policy Filters. The 'Organization Filter' dropdown is set to 'BPT-PennDOT Bureau of Public Transportation' and the 'Policy Year' dropdown is set to 'FY 2017 Statewide Transit Policy (Current)'. The 'Policy Rules' section displays various filters and calculation methods.

Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pcnt Residual Value	Last Updated
Age Only	Purchase Price + Interest	Weighted Average	1.10	0%	07:58 AM 12/05/2015

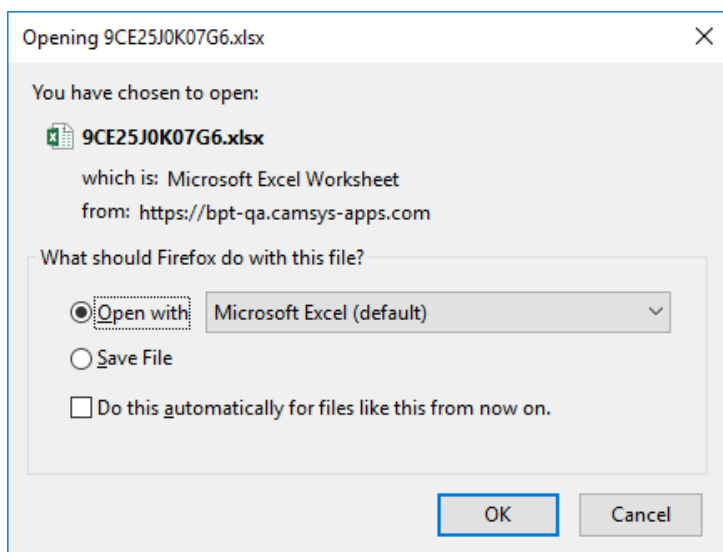
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 51 Policy Rules

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

Figure 52 Policy Rules Actions Dropdown

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

Figure 53 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 54 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

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 55 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 56 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 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 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

Asset Types

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

Figure 57 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 58 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

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 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

Asset Type Rules

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

Figure 59 Edit Icon



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

Figure 60 Modify Asset Policy Rule**Modify Rule: IT Equipment**

X

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

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

Figure 61 Asset Type and Asset Subtype rules

Revenue Vehicles

Stations/Stops/Terminals

Support Facilities

Support Vehicles

Maintenance Equipment

Facility Equipment

IT Equipment

Office Equipment

Asset Subtype Rules

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

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

Figure 62 Modify Asset Subtype Rule**Modify Rule: Guideway: At-Grade**

X

Replacement

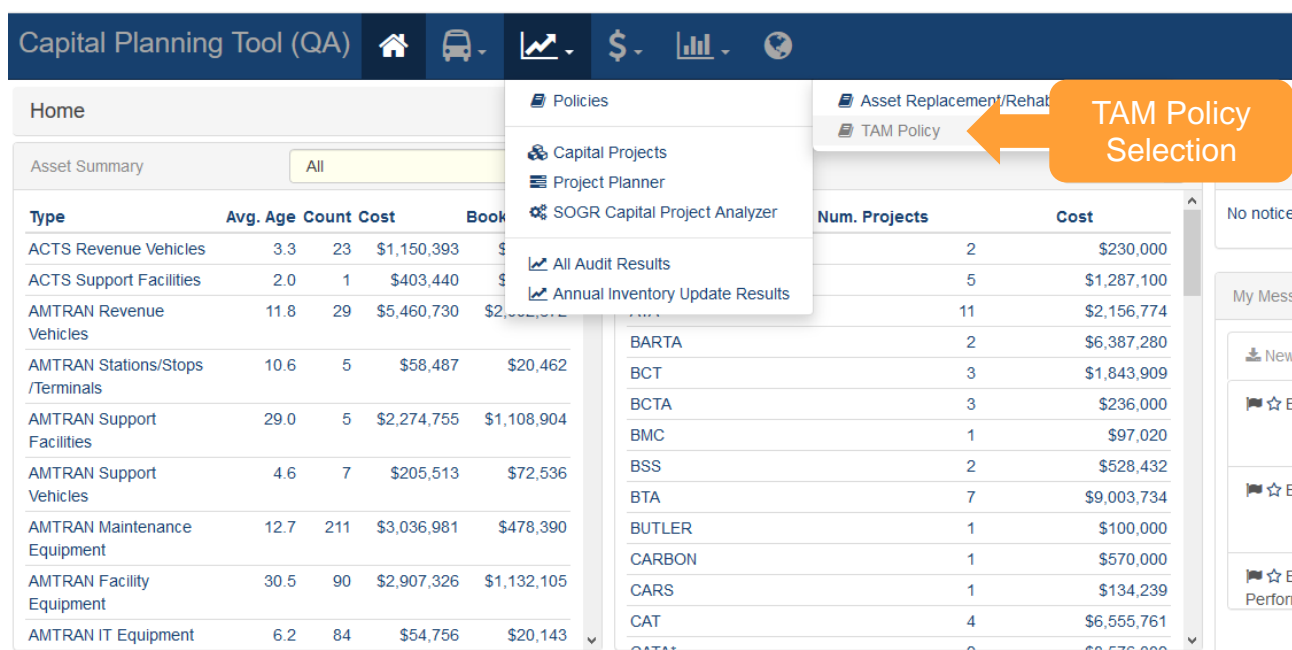
* ESL (Mo)	* Replacement Cost	* Cost FY	<input checked="" type="checkbox"/> Replace With New
1200	\$ 0	FY 18-19	<input type="checkbox"/> Replace With Leased
* ESL Used (Mo)	Lease Length Months		
0	0		
* Purchase Replacement Code	* Lease Replacement Code		
12.22.06	12.26.06		
* Engineering Design Code	* Construction Code	* Rehabilitation Code	
12.21.06	12.23.06	12.24.06	
<input type="button" value="Save"/> <input type="button" value="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!

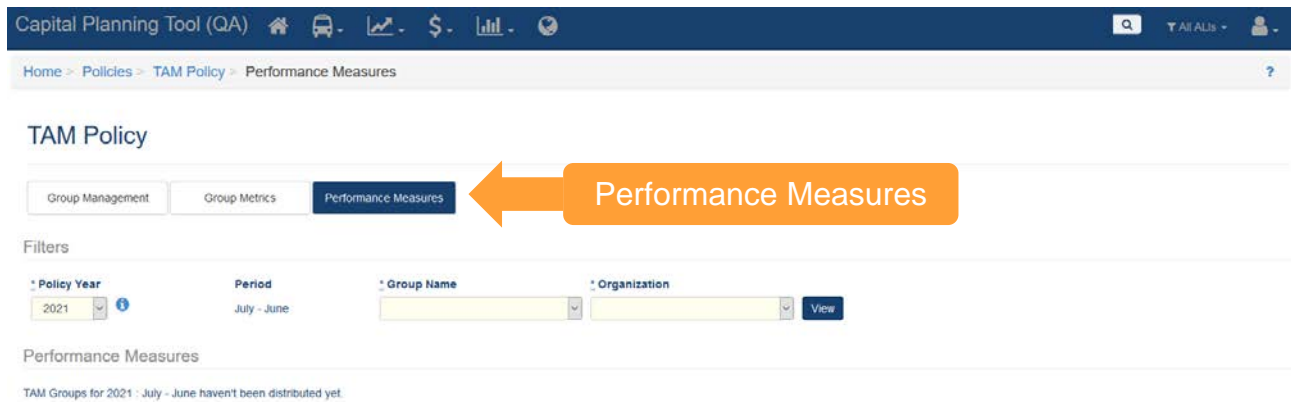
Figure 63 Remove Asset Subtype Rule

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 64 TAM Policy Dropdown Menu Selection

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

Figure 65 TAM Policy Performance Measures


Capital Planning Tool (QA)

Home > Policies > TAM Policy > Performance Measures

TAM Policy

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

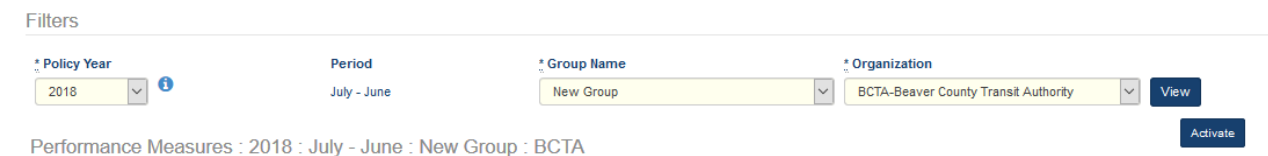
Filters

* 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.

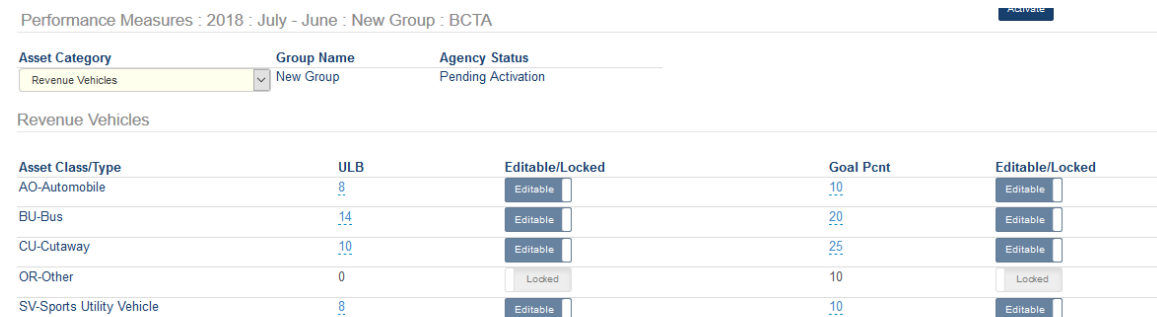
Figure 66 Policy Year Filters


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

Filters

* Policy Year: 2018 | Period: July - June | * Group Name: New Group | * Organization: BCTA-Beaver County Transit Authority | View | 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 67 Asset Type Percentage Settings


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

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 68 Activate Performance Measures

TAM Policy

Group Management

Group Metrics

Performance Measures

Filters

* Policy Year
2018

Period
July - June

* Group Name
New Group

* Organization
BCTA-Beaver County Transit Authority

View

Activate

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

Asset Category
Facilities

Group Name
New Group

Agency Status
Pending Activation

Facilities

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

Activate Button

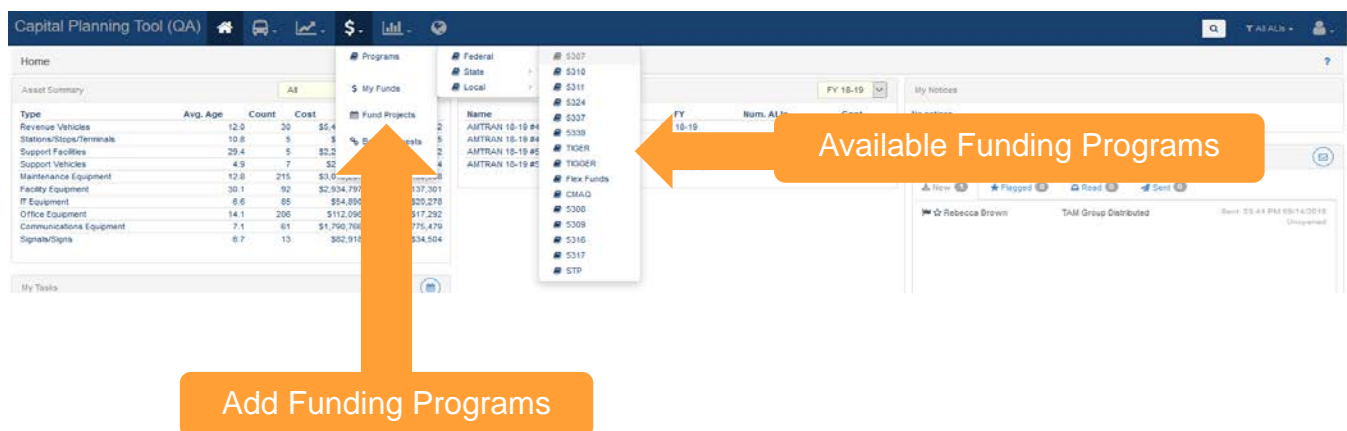
6.0 Funding

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

6.1 Programs

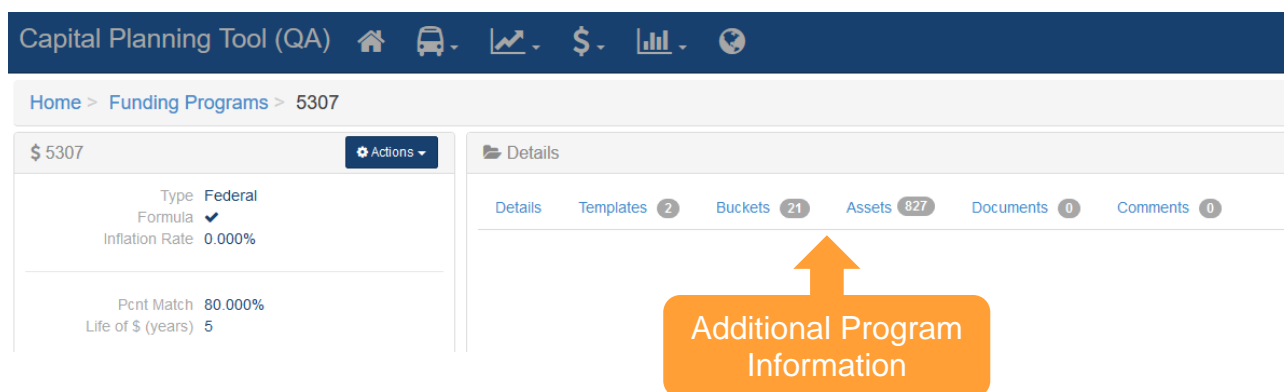
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

Figure 69 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.

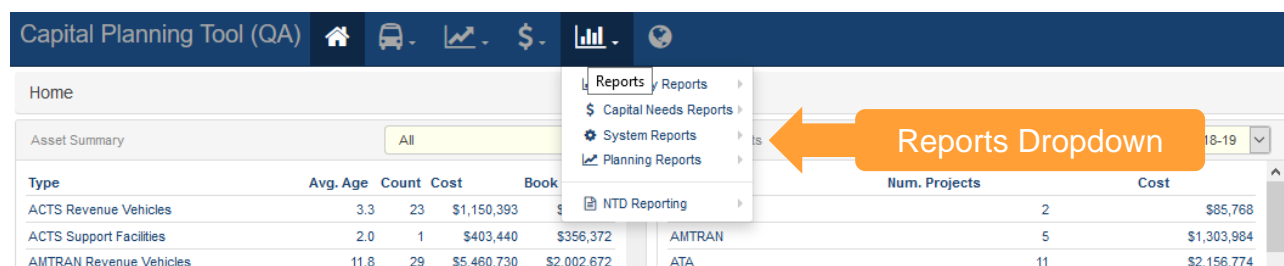
Figure 70 Funding Program Details



7.0 Reports

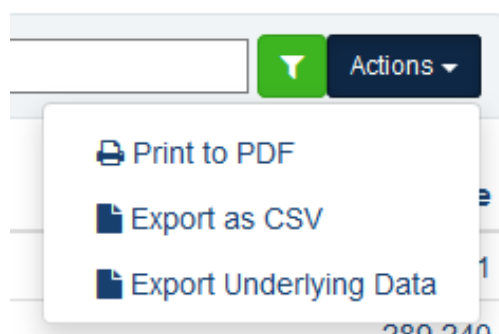
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 71 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 72 Report Exports

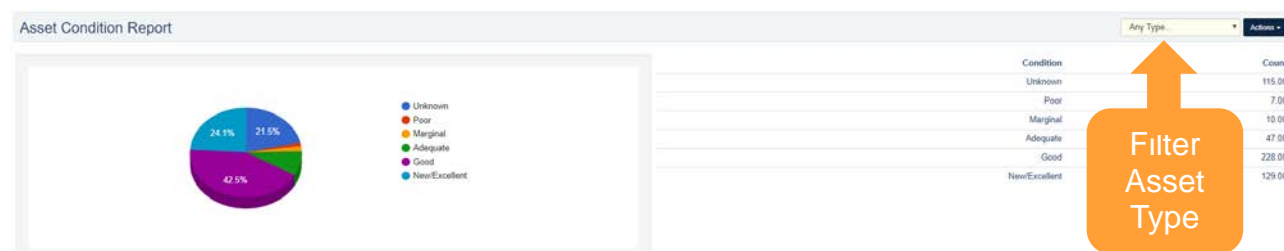


7.1 Inventory Reports

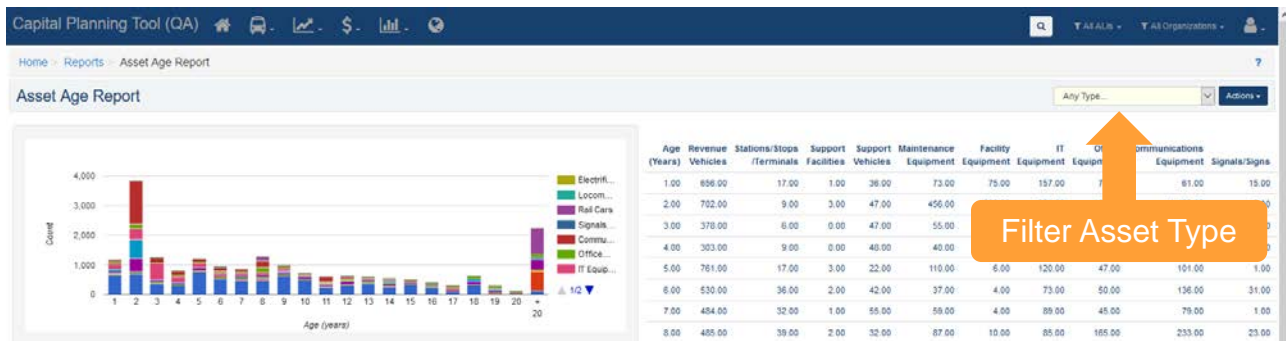
Inventory reports are a rollup of asset inventory data, including age, condition, and funding related calculations.

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 73 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 74 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.

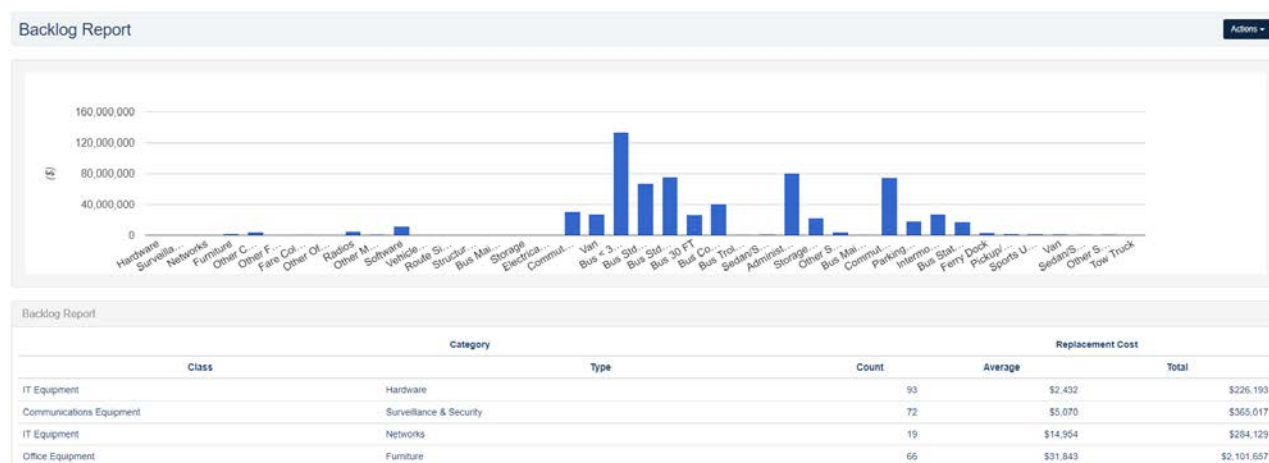
Figure 75 Asset Funding Source Report

7.2 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 76 Backlog Report



7.3 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 77 Vehicle Replacement Report

Capital Planning Tool (QA)

Home > Reports > Vehicle Replacement Report

Vehicle Replacement Report Jump to... FY 18-19 Actions

All Transit Operators

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	\$4,088,775
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	\$97,823,366

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 78 State of Good Repair Report

Capital Planning Tool (QA) 🔍 ▼ All ALJs ▼ All Organizations - 364 👤

Home > Reports > State of Good Repair Report ?

State of Good Repair Report Jump to... Actions

State of Good Repair: All Transit Agencies

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	\$1,108,902	\$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 79 Disposition Report

Capital Planning Tool (QA) 🔍 ▼ All ALJs ▼ All Organizations - 364 👤

Home > Reports > Disposition Report ?

Disposition Report Jump to... FY 17-18 Actions

All Transit Operators

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
Totals for FY 17-18			132	\$1,782,025	\$13,471,504

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 80 Asset Service Life Summary Report

Capital Planning Tool (QA) 🔍 ▼ All ALJs ▼ All Organizations - 364 👤

Home > Reports > Asset Service Life Summary Report ?

Asset Service Life Summary Report Asset Type: Revenue Vehicles Months Past ESL Min: 1 Months Past ESL Max: Filter or Export

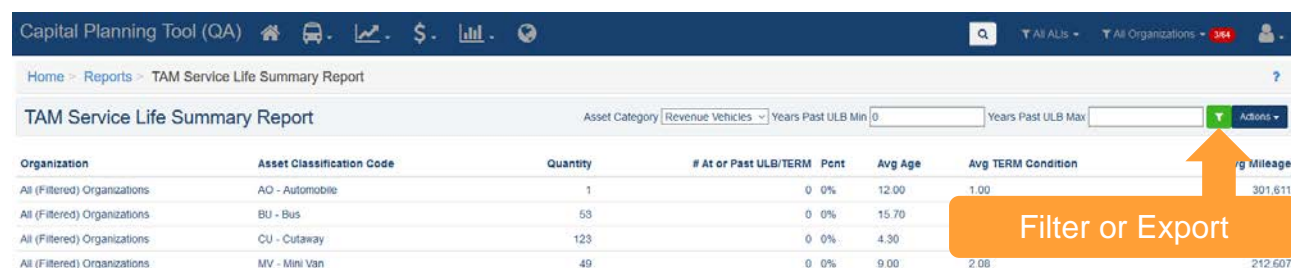
Organization	Subtype	Quantity	# Past ESL (Mo.)	Pcnt	# Past ESL (Mi.)	Pcnt	# Past TERM Thres	Pcnt
All (Filtered) Organizations	Bus < 30 FT	123	55	45%	29	24%		63%
All (Filtered) Organizations	Bus 30 FT	9	6	67%	9	100%		
All (Filtered) Organizations	Bus Commuter/Suburban	14	0	0%	0	0%		

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 81 TAM Service Life Summary Report



Capital Planning Tool (QA) [Icons] [Search] [Filter: All ALIs] [Filter: All Organizations: 564] [User Icon]

Home > Reports > TAM Service Life Summary Report

TAM Service Life Summary Report

Asset Category: Revenue Vehicles | Years Past ULB Min: 0 | Years Past ULB Max: | Actions

Organization	Asset Classification Code	Quantity	# At or Past ULB/TERM	Pent	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	2.08	212,607

Filter or Export

8.0 Specialized Reports

8.1 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 82 Asset Fleet Builder

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

Build Revenue or Support Fleets

The Asset Fleet Builder analyzes your organization's inventory and groups assets into fleets following parameters set by NTD reporting. If you run the asset fleet builder, you will delete all existing fleets and regroup the assets from scratch. Please note that you will lose any existing fleet data. Once the builder has completed, you will receive a notification. Please review your fleets at that time and add fleet specific information.

Build Revenue Vehicles Fleets

Build Support Vehicles Fleets

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

Figure 83 Asset Fleet Builder—Orphaned Assets

Capital Planning Tool (QA)

Fleets

Revenue Vehicles Support Vehicles **Manage Fleets**

Orphaned Assets

Any Asset Type: [v] Year Mfd: [v] Any Subtype: [v] Any Vehicle Type: [v] Any Status: [v]

Agency	Asset Type	Tag	PU	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	1FDFE4FS6HDC18987	-	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 84 Adding an Orphaned Asset to a Fleet

Orphaned Asset

Add to Existing Fleet

There are no fleets in the system that match this asset









Create New Fleet

Click Save to create a new fleet based on this vehicle

Save Cancel

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

Figure 85 Adding a New Fleet

Capital Planning Tool (QA)        All ALIs All Organizations 

Home > Fleets > Revenue Vehicles > CAT : MB DO : GIL : 2017

Asset fleet was successfully created.

Fleets

CAT : MB DO : GIL : 2017

Organization CAT
NTD ID
Agency Fleet ID

Actions

- Update this fleet
- Remove this fleet

Details

Basic Information Vehicle Information Mileage Information Assets 1

Figure 86 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 87 Update Odometer Readings

Capital Planning Tool (QA)        All ALIs All Organizations 164 

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 Active Vehicle

Asset Tag	External ID	VIN	License Plate	Odometer Reading FY Start	Odometer Reading FY End	Mileage During FY	Last Odometer Value	Last Odometer Date
066560		15GGB221011072394		Record Mileage	Record Mileage		345,025	11/30/2017
066561		15GGB221311072406		Record Mileage	Record Mileage		35,366	11/30/2017

Showing 1 to 2 of 2 rows

Figure 88 Remove or Add Assets from within a Fleet

The screenshot shows the 'Capital Planning Tool (QA)' interface. The breadcrumb trail is 'Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001'. The 'Fleets' section is active, showing details for 'AMTRAN : MB DO : GIL : 2001'. The 'Assets' tab is selected, displaying a table with columns: Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of asset data are visible. An orange callout box with the text 'Add or Remove Assets' and a downward arrow points to the 'Action' column.

Asset Tag	External ID	VIN	License Plate	Title Number	Status	Emergency Contingency	ADA Accessibility	ULB	Mileage	Valid in Fleet	Action
066561		15GGB221311072406			In Service	No	No		35366	Yes	
066560		15GGB221011072394			In Service	No	No		345025	Yes	

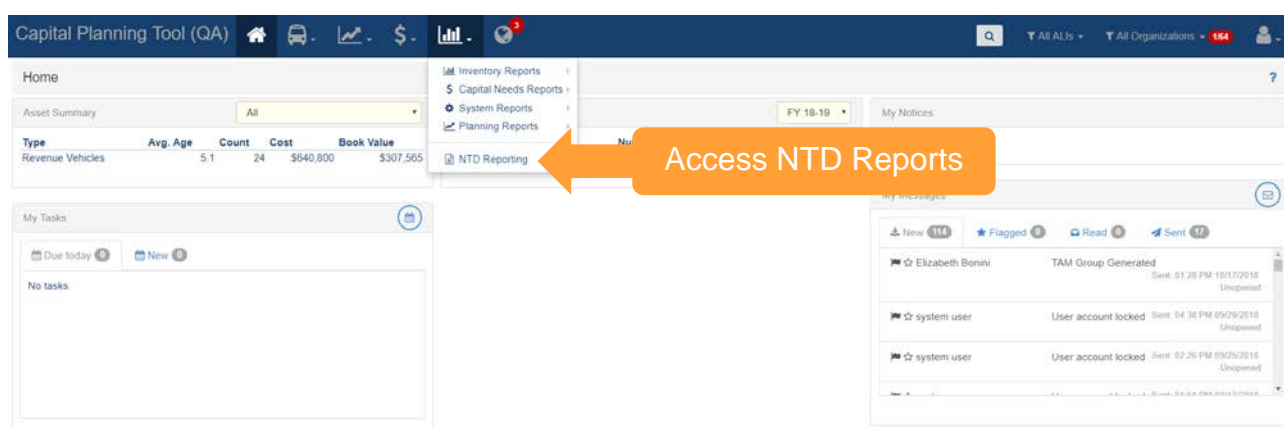
Showing 1 to 2 of 2 rows

8.2 NTD Asset Reports

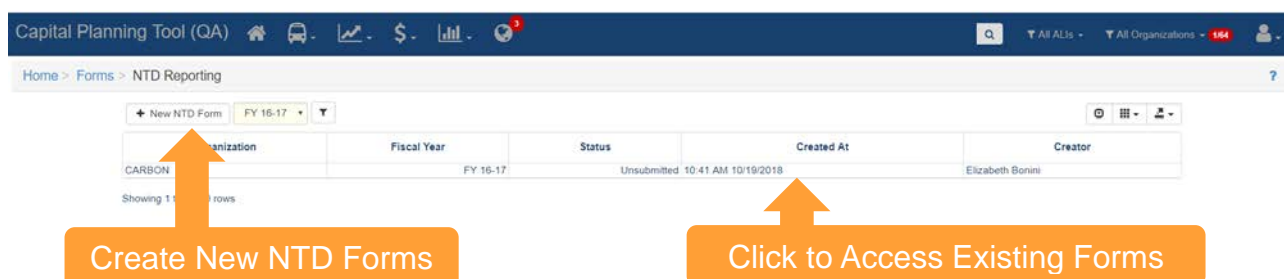
The NTD Asset Reports are forms that must be submitted on an annual basis for every organization that receives Federal public transit funding. Required forms differ between organization, based on the category of assets in operation for each organization. The specific forms are as follows:

- 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 89 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 90 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 91 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

Agency Information

Reporter Name: Elizabeth Bonini

Reporter Title:

Reporter Department:

Reporter Email: ebonini@pa.gov

Reporter Phone: 9999999999

Reporter Phone Ext:

Save NTD Form

Click Save NTD Form Button

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Figure 92 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

submit this form

New version

Remove this form

Details

Versions History

Date	Creator	Download	Comments	Process Log
10:41 AM 10/19/2018	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 93 Download each NTD Form

Capital Planning Tool (QA)

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

Success

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

Download A-15

Download A-20

Download A-30

Download A-35