CAMBRIDGE SYSTEMATICS

Think Forward

Release Notes

TO: TransAM Users

DATE: October 1, 2019

TOPIC: TransAM Version 2.7.0

The following memorandum describes the new features and fixes that have been released to the TransAM platform. This release consists of new features, and fixes.

Platform Improvements - General:

- Currently, the number of viewable records in an asset table was allowed up to 100, and 10,000 records at one time. We have now included an additional option of viewing 1,000 records at a time.
- Remove the following 'Unknown' dropdown selection values from asset profiles, in order to prevent users from selecting an 'Unknown' value (existing selections will stay in place, but if a user edits the page, they must make a new selection):
    - Revenue Vehicles:
        - Primary Mode – Remove 'XX-Unknown'
        - Service Type (Primary Mode) – Remove 'XX-Unknown'
        - Supports Another Mode – Remove 'XX-Unknown'
        - Service Type (Another Mode) – Remove 'XX-Unknown'
    - Equipment – Service Vehicles (Non-Revenue):
        - Primary Mode – Remove 'XX-Unknown'
- A new 'Client Admin Interface' has been developed. The existing 'Admin Interface' has been renamed the 'System Admin Interface'. Over time, the Client Admin Interface will have additional functionality added, for specific use by client admin users. This additional functionality will include both new functionality and some existing functionality that will migrate from the System Admin Interface. The newly developed Client Admin Interface is being released with the following functionality:
    - System Rollover feature has been migrated to the Client Admin Interface
    - A new Message Template and Message History Log section has been added.

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    - This new section displays all existing message and email templates. Users can add new templates, but any new templates will need to be “hooked up” by a CS developer in order to function (we recommend working with CS to develop new templates).
    - All messages and emails delivered from the system will now appear in the Message History section. A separate message/email entry will appear for every user that receives a specific message/email.
    - Client Admin users deactivate a message or just the email version of a message, but unchecking the corresponding box within a message template.

- A new ‘Client Admin’ user privilege has been added, which provides access to the Client Admin Interface. All existing users with the ‘Admin’ privilege will automatically be provided with the ‘Client Admin’ privilege as well.
- There are now standardized user ‘Roles’ across all Transit Agency and Grantor Organizations. ‘Guest’, ‘Staff’ and ‘Manager’ are now standard dropdown selections for user roles, and several changes have been introduced along with these modifications:
  - The ‘BPT Manager’ (aka Super Manager) user privilege has been removed, and the ability to access the Template, Bucket, and Funding related features is now included within the Manager user role for Grantor organization Managers only.
- A new ‘Asset Manager’ privilege has been created for users at the Grantor organizational level. This privilege can be added to users with the ‘Staff’ user role, and provides the ability to approve early disposition requests, and to record final dispositions for all assets. Users at the Grantor level with the ‘Manager’ user role or with the ‘Client Admin’ privilege, have these capabilities as well.
- A new field was added to the Organizational Profile of ‘Legal Name’. The ‘Legal Name’ was populated with the current ‘Name’ field value and is a required field.
  - The ‘Name’ field label was changed to ‘Common Name (dba)’, and the ‘Acronym’ field was changed to ‘Acronym or Short Name’.
- The ‘Asset Condition Report’ was added to some clients that did not have the report.
- The SOGR Analyzer has been updated to allow users to create SOGR projects up to 50 years. This includes years 1-15 at one year intervals and years 20-50 at five year intervals. The default selection remains at 12 years
  - Users can also run the SOGR Analyzer for current year projects, previously users could only run the SOGR analyzer starting with projects for the Planning Year (Current Year +1). Default selection is still the Planning year.
- Manually created projects can be created for up to 50 years now, instead of just 12.

- A validation was added to ensure that if the date associated with a 'Service Status' life cycle event is earlier than the 'In Service Date' of the corresponding asset, saving or uploading of that date will fail.

Platform Improvements – NTD Related:

- Within the organizational profile, individual organizations now have the ability to select a NTD reporting period specific to their organization, which will then generate NTD asset reports according to one of the following reporting periods, annually:
    - July – June
    - October – September
    - January – December
- There was an extra grey header row at the top of A-30 form which has been removed and the 'Energy Consumption' tab has been moved to the last tab in the downloaded A-30 excel file.
- Within the 'Manage Fleets' tab of the Fleet Builder feature, the 'Build Revenue Vehicle Fleets' and 'Build Service Vehicle (Non-Revenue) Fleets' actions have been updated. When either button is pressed, the previously viewable assets are removed and both buttons are disabled as the fleets are built.
- In the 'Manage Fleets' tab section of the Fleet Builder feature, the 'Class' column depicts the value of 'Support Vehicles', but instead should depict the value as 'Service Vehicles (Non-Revenue)'.
- The TAM Service Life Summary Report has been updated with the following changes:
    - Performance of the report has been improved.
    - The view has been modified and changed from a drilldown action, to a filter that changes from a Consolidated Org or Single Org view.
    - The Consolidated and Single Org views are controlled by the organizations selected in the site-wide organization filter
    - The location of the report has been moved on the main navigation dropdown, to a link above the 'NTD Reporting' link.
    - Additional data fields have been added to include the 'Goal' column, 'TAM Policy Year', and 'Goal Pcnt'.
        - All three fields pull data from the most recently 'Activated' TAM Policy for each organization.

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- The ‘Goal’ and ‘Goal Pcnt’ values are weighted by quantity when viewing data in a consolidated format for multiple organizations.
- Additional data values have been added to the underlying data exports.

Bug Fixes:

- The projects listed on the ‘Capital Projects’ tab within an asset profile, were not depicting projects in descending order by fiscal year.
- Upon clicking ‘Add Asset’ and being prompted to select the asset ‘Category’ and ‘Class’ values, when moving to the data entry form, the previously selected ‘Class’ was not carrying over to the new form.
- Descriptive text was missing on the ‘Performance Measures’ tab within the TAM Policy, explaining the rules for each performance measure.
- In some cases, when manually adding subsequent new users, some of the data fields would automatically populate for the new user profile. This has been fixed.
- Service Status for Facilities was not being processed from the New Inventory bulk templates.
- When editing an existing life cycle event, the user name was not updating in the asset history log with the name of the user editing the event.
- In some instances, not all organizations were listed in the Organization dropdown when manually adding a new asset.
- The ‘Other (OTHR)’ dropdown selection within the ‘Ownership Type’ field was not being processed from the New Inventory bulk templates.
- The ‘Parent’ field name is now required when updating an asset location life cycle event.
- The Export All download had incorrect values appearing after Column X in the excel download, as an additional column header was added without the corresponding data.
- In some cases, duplicate assets were appearing upon adding new assets. This has been fixed.
- A Manufacturer name within the Manufacturer dropdown field for Revenue Vehicle and Service Vehicle asset profiles was updated as there was a typo.
- The filter button on the ‘Manage Fleets’ page within the Fleet Builder feature was not filtering data correctly.
- When selecting the ‘Service Status’ column in the Query Tool feature, zero records were being returned.

- Assets that had not passed Age AND Mileage and were in the Planning Year +1 should move to the new Planning Year +1 during the fiscal year roll-over process.