



TransAM

General 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

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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

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

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

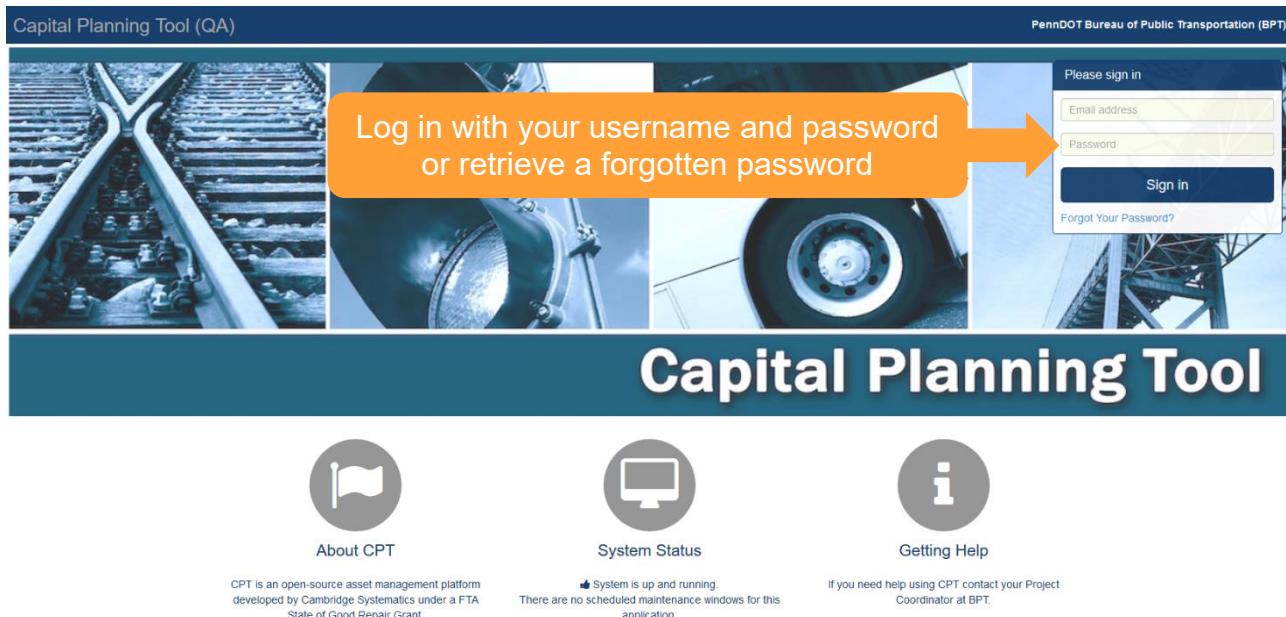
Figure 2 Set/Reset Password Screen

1.2 Ongoing Site Access

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



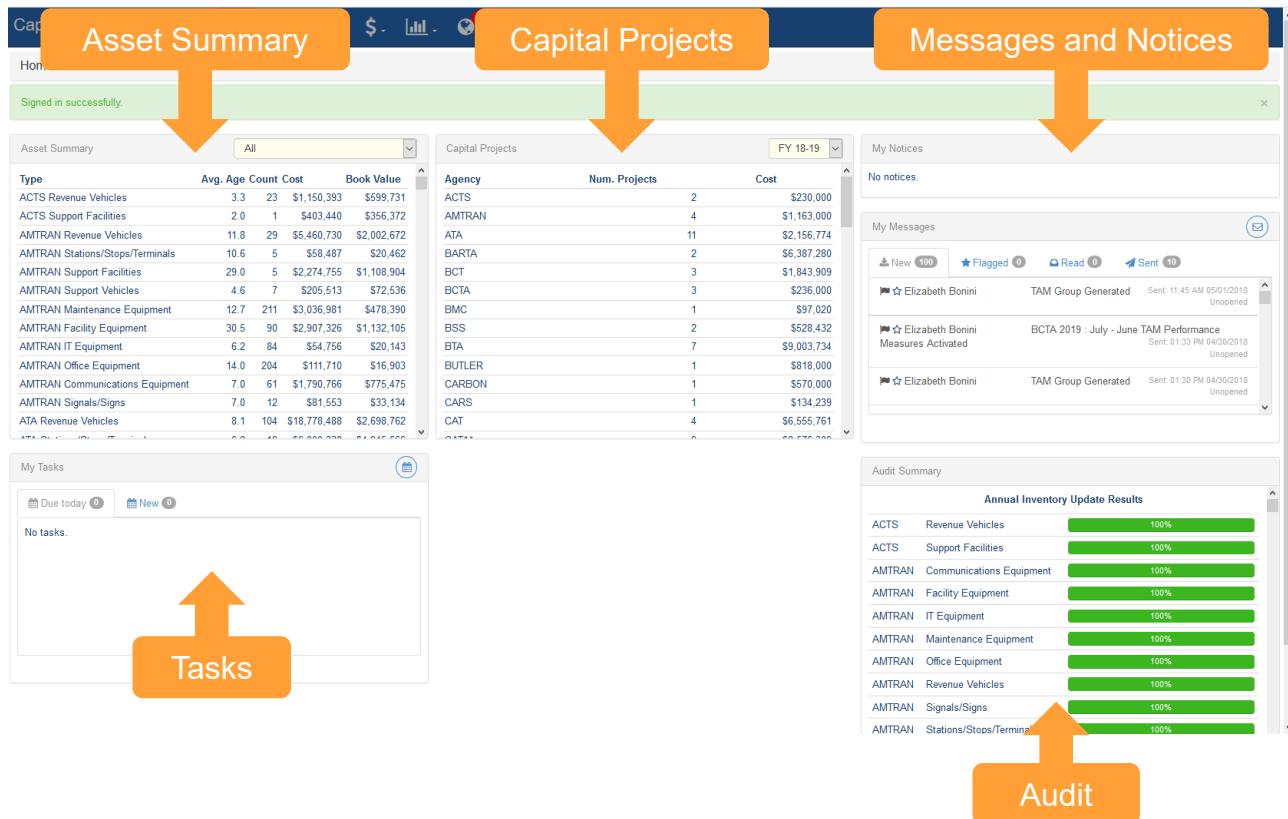
2.0 Dashboard

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.

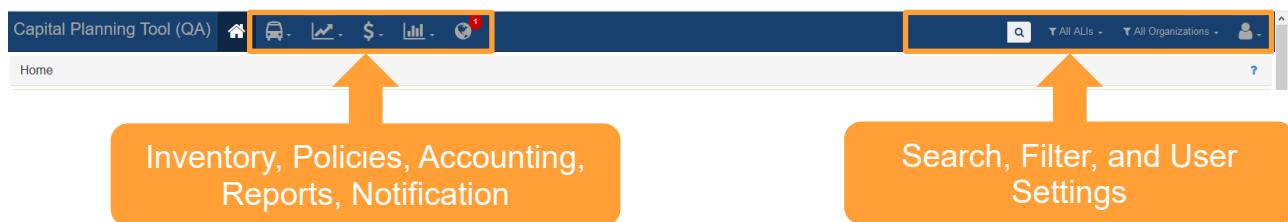
Figure 4 Dashboard Elements



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.

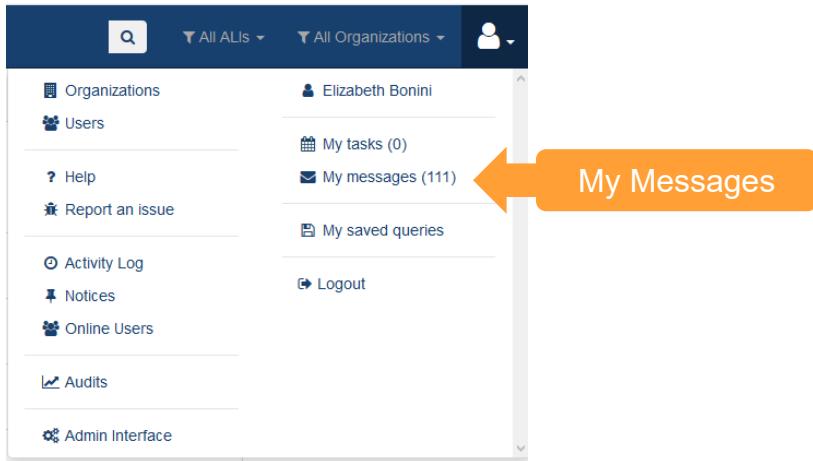
Figure 9 Filter Icon



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.

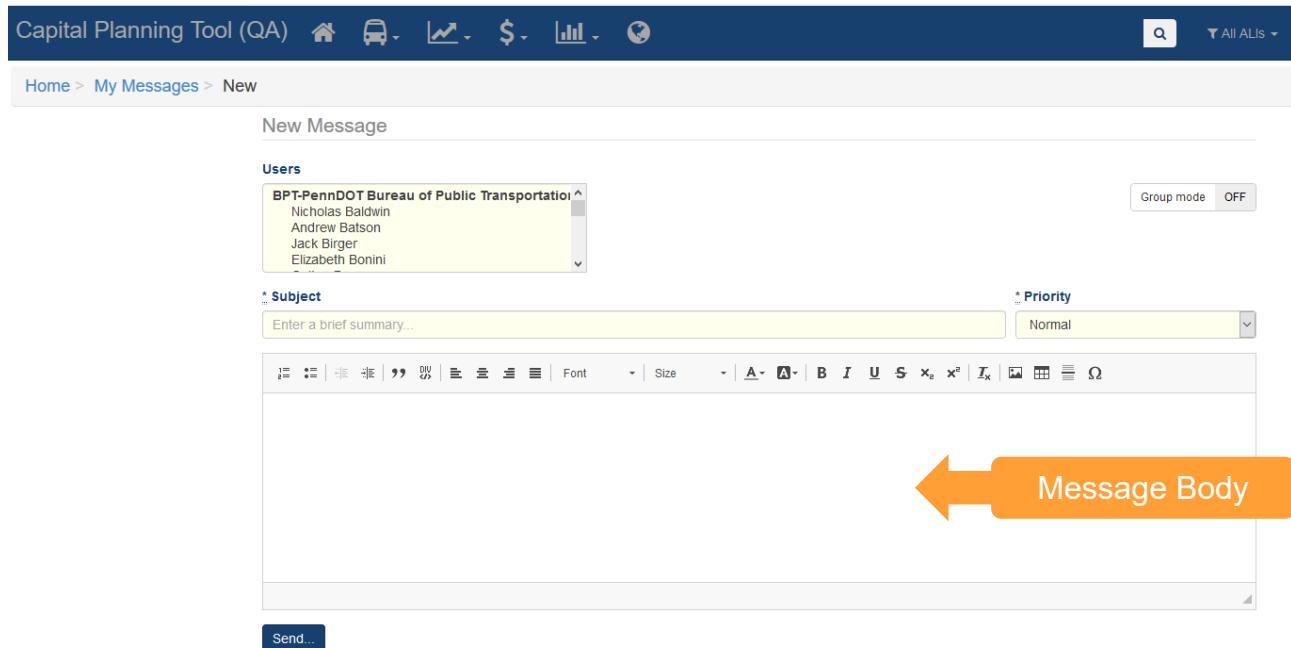
Figure 11 Messages

The screenshot shows the Capital Planning Tool (QA) 'My Messages' page. At the top, there are navigation icons for Home, Bus, Graph, Dollar, Bar, and Mail. Below that is a breadcrumb trail: Home > My Messages. The main area has buttons for Refresh and Compose. It displays a list of messages with columns for recipient, subject, and timestamp. The first message is from 'system user' with subject 'User account locked' sent at 01:51 PM 08/17/2018. The second message is from 'system user' with subject 'User account locked' sent at 12:22 PM 07/15/2018. The third message is from 'system user' with subject 'User account locked' sent at 11:21 AM 07/15/2018.

New	Flagged	Inbox	Sent
111	0	0	0
system user	User account locked	Sent: 01:51 PM 08/17/2018 Unopened	
system user	User account locked	Sent: 12:22 PM 07/15/2018 Unopened	
system user	User account locked	Sent: 11:21 AM 07/15/2018 Unopened	

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

Figure 12 Message Interface



3.4 Activity Line Item (ALI) Filter

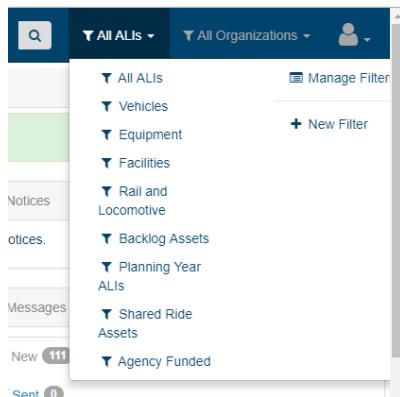
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

Figure 13 ALI Filter



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

Figure 14 ALI Filters



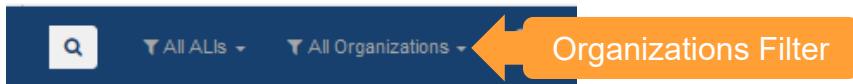
To create a new filter, select “New Filter” and specify the details required.

Figure 15 New ALI Filter

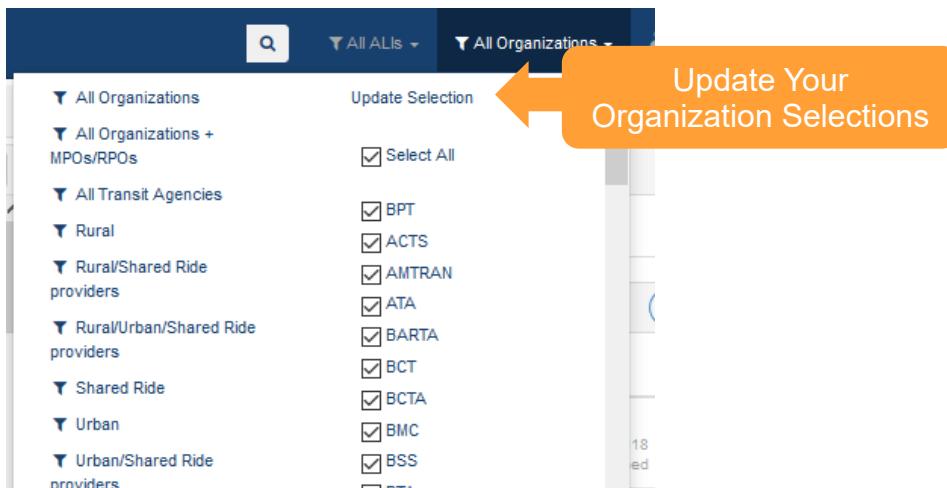
The screenshot shows the 'New ALI Filter' interface. On the left, there's a sidebar with 'Details' sections for 'Name' (with a placeholder 'Enter a name for this filter') and 'Description' (with a placeholder 'Enter a description for this filter'). Below these are options for 'Shared With': 'No One', 'BPT', and 'All Organizations'. The main right panel is titled 'Parameters' and contains several dropdown menus and checkboxes. These include 'Type' (set to 'All'), 'SOGR' (set to 'All'), 'Scope' (set to 'All'), 'Project Location' (dropdown), 'Asset Type' (dropdown), 'Asset Subtype' (dropdown), 'In Backlog' (checkbox), 'Owner' (dropdown), 'Funding' (dropdown), and 'Not fully funded' (checkbox). At the bottom are two buttons: 'Update ALI Filter' and '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

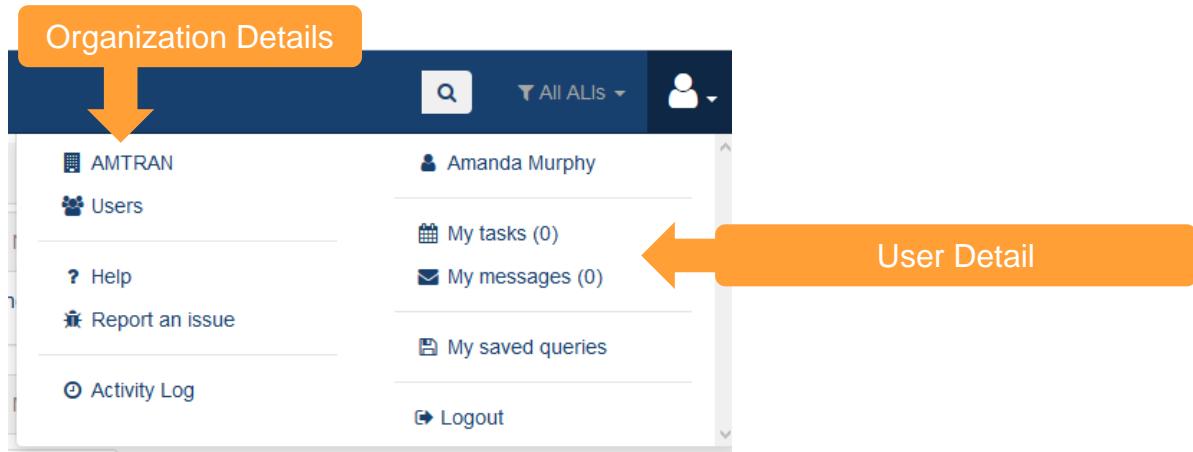
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

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

Edit Organization Details or Add Users

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

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

Edit Profile Details

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

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

Figure 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

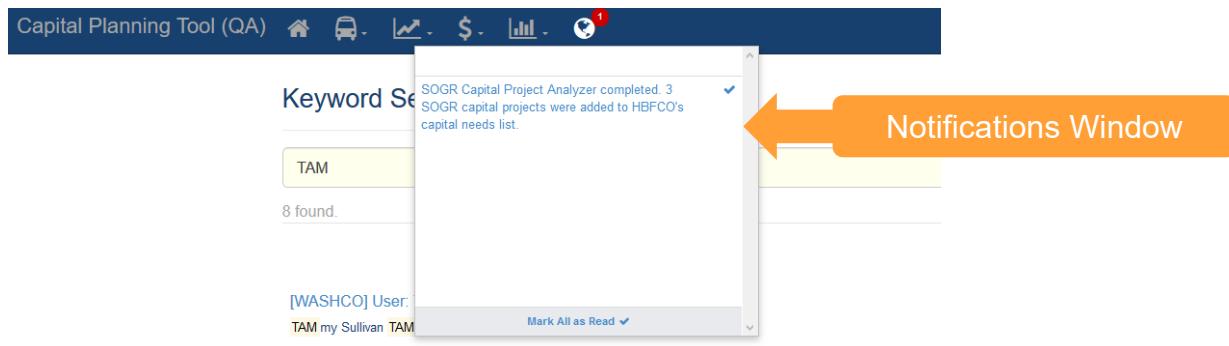
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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

3.8 Notifications

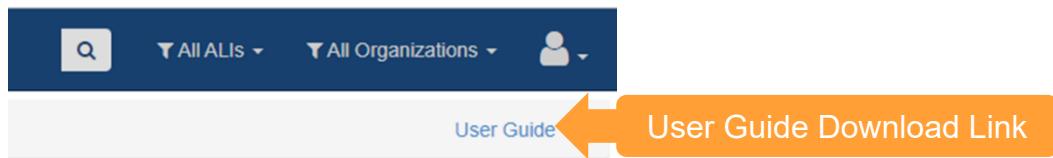
The notifications dropdown alerts you when there's activity in the system that you should be aware of. The globe at the top of the page will display a number with the count of "unread" notifications since your last check. Clicking on a notification item will take you to the change and mark the notification 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 'User Guide' link. Clicking the user guide icon will automatically download the user guide in .pdf format.

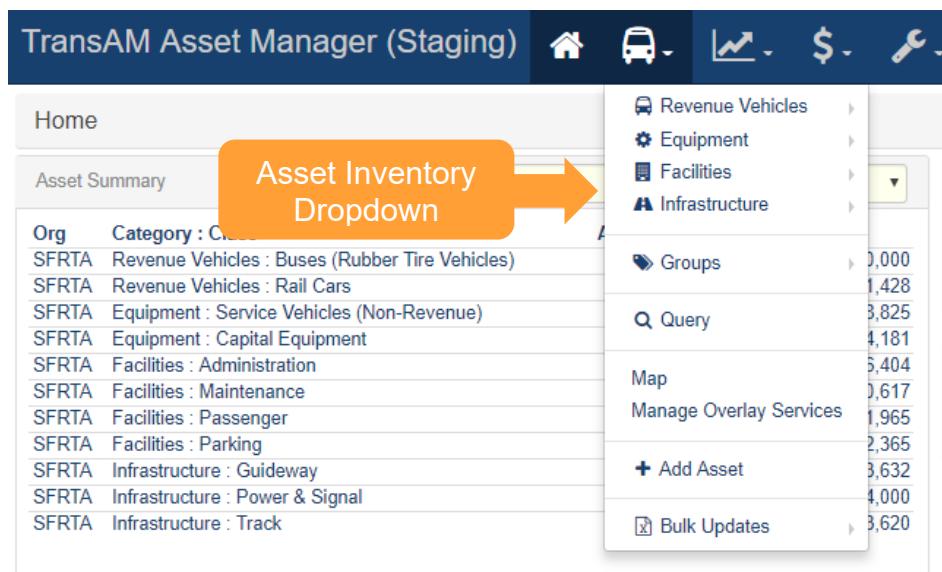
Figure 25 User Guide



4.0 Asset Inventory

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

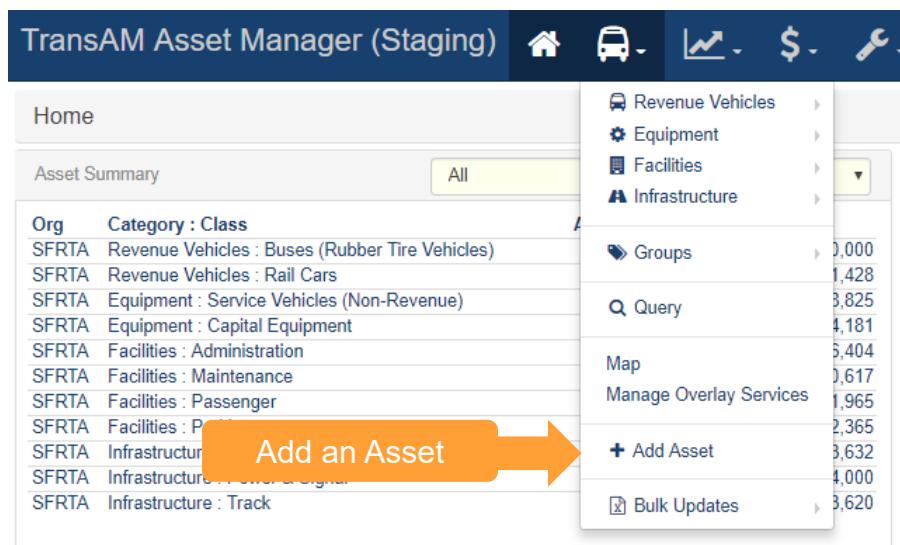
Figure 26 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 27 Adding an Asset



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

Figure 28 Select the Organization and Asset Class

Capital Planning Tool (QA) Home Add Asset \$ Graph Report Help

Home > Add Asset

New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

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

Figure 29 Adding Asset Required Details

Capital Planning Tool (QA) Home Add Asset \$ Graph Report Help All Assets All Organizations ?

Home > Add Asset

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 30 Add the Asset and Go To The New Record

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with sections like 'Funding', 'Procurement & Purchase', and 'Operations'. On the right, there are input fields for 'Seating Capacity (ambulatory)', 'Standing Capacity', 'ADA Accessible' (with radio buttons for Yes or No), 'In Service Date', 'Primary Mode', 'Service Type (Primary Mode)', and 'Dedicated Asset' (with radio buttons for Yes or No). At the bottom left, there's a button labeled '+ Add Asset & Go to New Record'. An orange callout bubble with an arrow points to this button, containing the text 'Add Asset and Go To New Record Button'.

4.2 Accessing Existing Assets

Every asset is categorized by category (e.g., Revenue Vehicles, Equipment), class (e.g., Buses (Rubber Tire Vehicles, Rail Cars), type (e.g., BU-Bus, RL-Commuter Rail Locomotive), and a subtype (e.g., Bus Std 40 FT, Bus Articulated) as part of a standardized hierarchy. The asset category, class, type, and subtype relationship is the taxonomy that defines your inventory and dictates the attributes or data fields that exist for assets. The list of available category, class, and type options are standardized across the system, while subtype options and some data fields have been specifically configured for your specific system deployment.

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

Figure 31 Existing Assets

Click Asset Class to access a list of assets

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

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

Figure 32 Existing Asset Interface

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GBB2713H3189913	GIL - Gillig Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFE4FS6HDC19987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4FS8HDC16988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4FSXHDC19992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4FS6HDC19990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4FS8HDC19991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4FSXHDC19989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4FS1HDC19993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4FS3HDC19994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4FS5HDC19995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4FS7HDC19996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFE4FS9HDC19997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFE4FS0HDC19998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#800	LCTA	15GGB311J3190014	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	15GGB311J3190015	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	1FDFE4FS8GDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
#802	LCTA	1FDFE4FSXGDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GCB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GCB201731111860	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GCB201031111880	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GCB201431111896	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F185793	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

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

Figure 33 Asset Record: Highlights

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

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

Figure 34 Asset Record: Profile and Summary

4.3 Editing or Updating Existing Asset Profile Data

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

Figure 35 Editing the Profile of an Existing Asset

The screenshot shows the TransAM software interface for managing asset profiles. At the top, there's a toolbar with various icons. Below it is a header bar with search and filter options: 'All ALIs' and 'All Organizations'. The main area is titled 'Profile' and contains tabs for 'Identification & Classification', 'Characteristics', 'Funding', 'Procurement & Purchase', 'Operations', and 'Registration & Title'. The 'Identification & Classification' tab is selected. On the left, there's a detailed list of asset attributes with validation symbols (*):

- Vehicle Identification Number (VIN): 1N9WMAC62GC84200
- * Asset ID: 1602
- * External ID: NTD ID 351701
- * Class: Buses (Rubber Tire Vehicles)
- * Type: BU-Bus
- * Subtype: Bus Std 35 FT
- * Estimated Service Life (ESL) Category: Heavy-Duty Small Bus

On the right, there's a table titled 'Event Log' with columns for 'Date & Time', 'Event By', and 'Notes'. The table shows three entries from 08/30/2018 at 05:32:04 PM. An orange callout bubble with an arrow points to the 'Edit' button in the top right corner of the profile section, containing the text 'Click Edit to Alter Profile Data'.

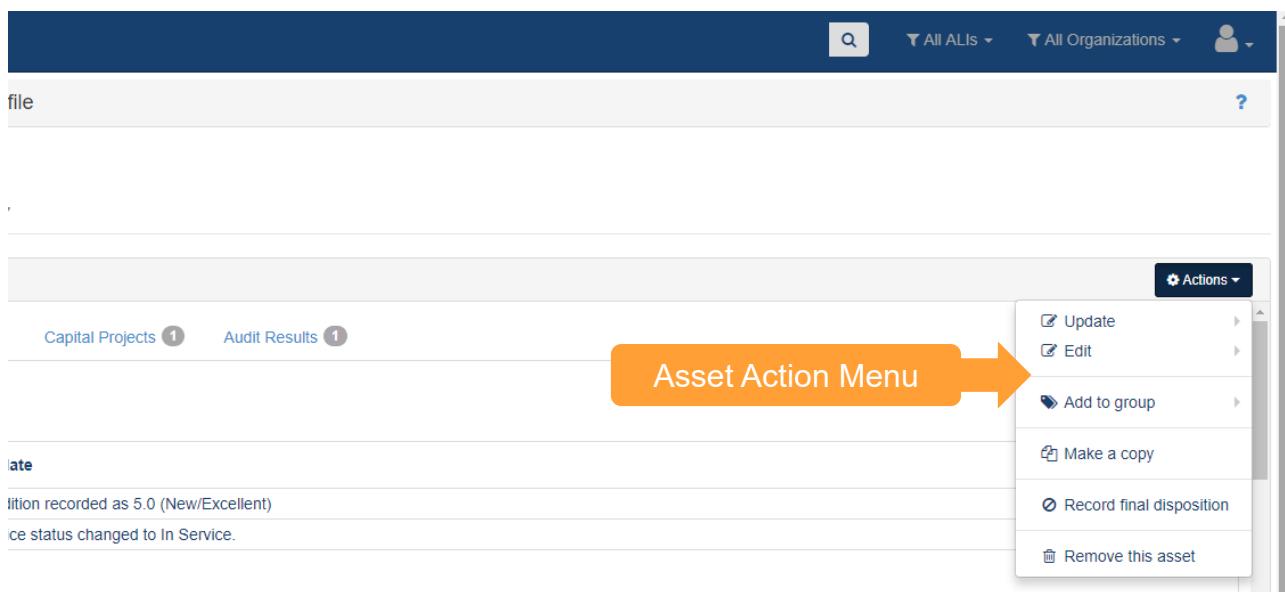
4.4 Updating Existing Asset Lifecycle Data

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

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

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

Figure 36 Updating the Lifecycle of an Existing Asset



4.5 Action Events (Disposition and Transfer Review)

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

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

Figure 37 Asset Action Events (Disposition and Transfer)

The screenshot shows the Capital Planning Tool (QA) interface. In the center, there is a table titled "Capital Projects" showing data for FY 16-19. To the left of the table, a dropdown menu is open under the heading "Action Events". The menu items are "Early Disposition Proposed" and "Newly Transferred Assets". An orange arrow points from the text "Action Events Menu" to this dropdown. The interface also includes sections for "Home", "Asset Summary", "My Tasks", and "Audit Summary". The Audit Summary section contains a chart titled "Annual Inventory Update Results" showing completion percentages for various asset types across different agencies.

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

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

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

Figure 38 Early Disposition Requests

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

4.6 Adding or Updating Assets by Bulk Update

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

Figure 39 Bulk Updates

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary'. The main area displays a table of asset data with columns for Type, Avg. Age, and various financial metrics. On the right, there's a sidebar for 'Capital Projects' listing agencies like ACTS, AMTRAN, and BARTA. A callout box labeled 'Bulk Updates' points to a section in the center-right where a user can '+ Add Asset' or select 'Bulk Updates'. An orange arrow points from the 'Bulk Updates' label to this section.

Type	Avg. Age	Value
ACTS Revenue Vehicles	2.3	\$5,793
ACTS Support Facilities	2.0	\$7,751
ACTS Guideway	0.0	\$0
ACTS Power & Signal	0.0	\$0
ACTS Track	0.0	\$0
AMTRAN Revenue Vehicles	12.0	\$2,076
AMTRAN Stations/Stops/Terminals	11.0	\$0,465
AMTRAN Support Facilities	29.4	\$3,902
AMTRAN Support Vehicles	4.9	\$2,534
AMTRAN Maintenance Equipment	12.9	\$9,690
AMTRAN Facility Equipment	30.2	\$0
AMTRAN IT Equipment	6.6	\$54,890
AMTRAN Office Equipment	14.1	\$112,098
AMTRAN Communications Equipment	7.5	\$17,292
AMTRAN Signals/Signs	6.8	\$1,790,766
AMTRAN Guideway	0.0	\$775,479
AMTRAN Power & Signal	0.0	\$82,918
		\$34,504

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

Figure 40 Bulk Update Tools

The screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' and 'Upload a Template'. An orange arrow points to the 'Create a new Template' button. Below this, a table lists previous bulk updates with columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The table includes entries for PIKECO, END, and WBT.

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	30
END		Inventory Updates	BETHANY JONES	Complete	84	84
WBT	IT_EQUIPMENT_UPDATE.xlsx	Inventory Updates	BETHANY JONES	Complete	84	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.”

Figure 41 Bulk Update Details

Capital Planning Tool (QA) ? All ALIs ▾ All Organizations ▾

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

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

Select Template and Asset Type

Template Type: Inventory Updates

Fta Asset Class: Select fta asset class...

Organization: Organization dropdown

Create template button

Choose these parameters

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

Figure 42 Bulk Update Spreadsheet Download

Capital Planning Tool (QA) ? All ALIs ▾ All Organizations ▾

Home > Bulk Updates > Download Template

Success

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

Download File

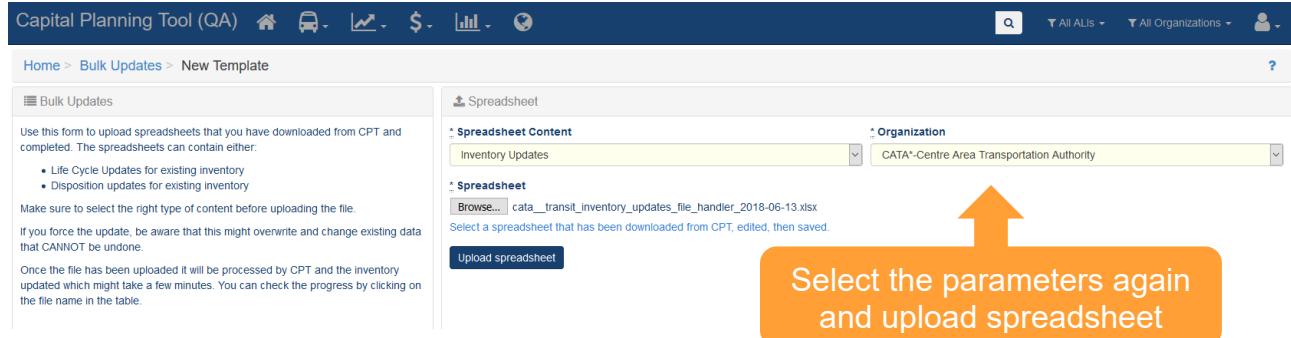
Edit the resulting spreadsheet and make sure you save your changes.

Figure 43 Bulk Update Spreadsheet

Asset	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Object Key	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep.
3_A2E18C2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN08YYU020684	In Service	01/23/2018		1.00	01	
4_A2E18C2NDFDG6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN07DXYU020685	In Service	01/23/2018		1.00	01	
5_A2E18C3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018		1.00	01	
6_A2E18C474G4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090105	In Service	01/23/2018		1.00	01	
7_A2E18C4M14FE	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090106	In Service	01/23/2018		2.00	01	
8_A2E18C565B2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090107	In Service	01/23/2018		2.00	01	
9_A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291451090108	In Service	01/23/2018		2.00	01	
10_A2E18C695LBR	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291651090109	In Service	01/23/2018		2.00	01	
11_A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090110	In Service	01/23/2018		2.00	01	
12_A2E18C8000038	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091596	In Service	01/23/2018		2.00	01	
13_A2E18C817G04	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271081091596	In Service	01/23/2018		2.00	01	
14_A2E18C893ISGC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091597	In Service	01/23/2018		2.00	01	
15_A2E18C935EM0	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271381091598	In Service	01/23/2018		2.00	01	
16_A2E18C9AA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018		2.00	01	
17_A2E18CB0HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091599	In Service	01/23/2018		2.00	01	
18_A2E18CBEMXK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271481091599	In Service	01/23/2018		2.00	01	
19_A2E18CG4N614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018		2.00	01	
20_A2E18CLC0KL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091652	In Service	01/23/2018		2.00	01	
21_A2E18GD897DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271091091653	In Service	01/23/2018		2.00	01	
22_A2E18GE7EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271291091654	In Service	01/23/2018		2.00	01	
23_A2E18GF3ECK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271491091655	In Service	01/23/2018		2.00	01	
24_A2E18GF4C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271791091656	In Service	01/23/2018		2.00	01	
25_A2E18GFNSG4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091657	In Service	01/23/2018		2.00	01	
26_A2E18GGK040	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091658	In Service	01/23/2018		2.00	01	
27_A2E18GGG3JG	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091659	In Service	01/23/2018		2.00	01	
28_A2E18GHBAIB0	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091660	In Service	01/23/2018		2.00	01	
29_A2E18GHKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091661	In Service	01/23/2018		2.00	01	
30_A2E18GA178K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091662	In Service	01/23/2018		2.00	01	
31_A2E18GIN06GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291651111645	In Service	01/23/2018		2.00	01	
32_A2E18GUFCK1	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291851111646	In Service	01/23/2018		2.00	01	
33_A2E18GK1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X51111647	In Service	01/23/2018		2.00	01	
34_A2E18GLC0K4	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291511111648	In Service	01/23/2018		2.00	01	
35_A2E18GL8SC44	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079888	In Service	01/23/2018		2.00	01	
36_A2E18GLUHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079889	In Service	01/23/2018		2.00	01	
37_A2E18GMNPNW4	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGR2719A1178187	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 44 Bulk Update Upload



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

Figure 45 Bulk Upload Processing

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 46 Bulk Update Edit

Capital Planning Tool (QA)

Home > Bulk Updates > cata__transit_inventory_updates_file_handler_2018-06-13.xlsx

File Upload

Name: cata__transit_inventory_updates_file_handler_2018-06-13.xlsx
Content: Inventory
Uploaded By: Elizabeth
Upload Time: 04:36 PM 06/13/2018
Status: Complete

Actions

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

Details

Processing Process Log Updates

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: 0
Num. Rows Replaced: 0
Num. Rows Failed: 0

4.7 Query

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

Figure 47 Asset Query

TransAM Asset Manager (Staging)

Home

Asset Summary All

Org Category : Class
SFRTA Revenue Vehicles Buses (Rubber Tire Vehicles)

Query your Assets

Revenue Vehicles
Equipment
Facilities
Infrastructure
Groups
Query
Map
Manage Overlay Services
Add Asset
Bulk Updates

Capital Projects
Agency SFRTA

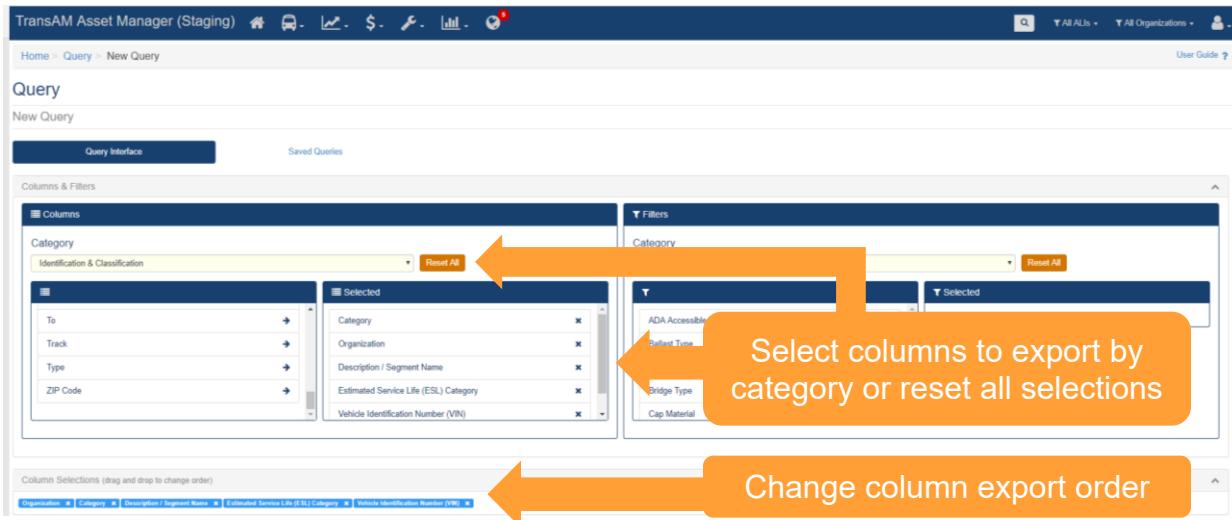
Audit Summary

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

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

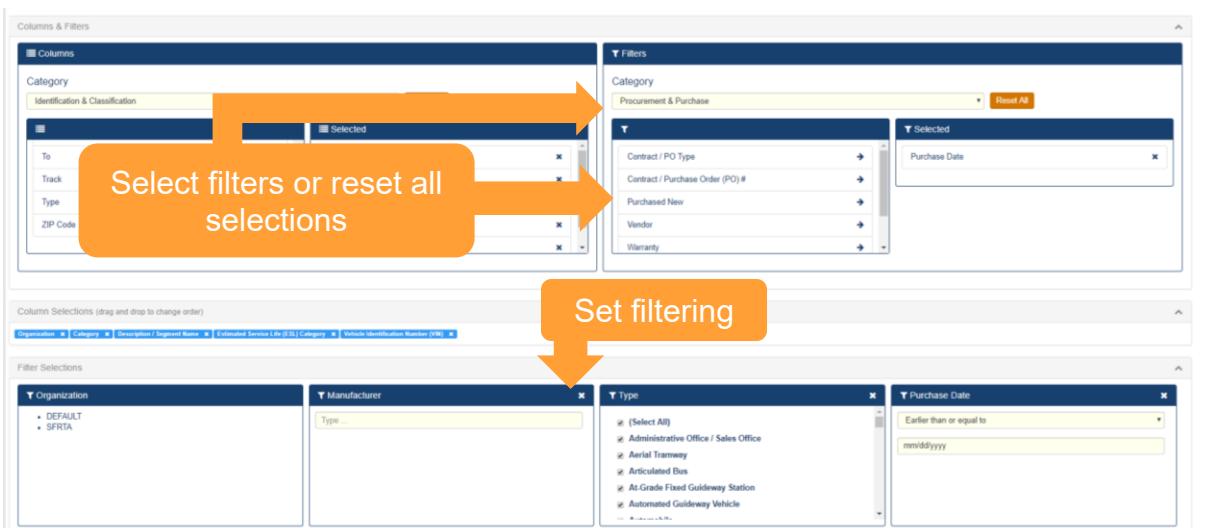
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

Figure 48 Column Selection



From the Query screen, you can also select what data to filter. Filtering functionality works in a similar manner as column selection. Select each individual data field that you want to filter, by moving fields to the Selected box by clicking on the arrow in each field and remove selected fields by clicking on the “x” of each selected field. Selected filters appear in the Filter Selections panel, where the user can set filtering parameters. The organization data field is always added as default selection, and is non-configurable as it is set by the sitewide organization filter.

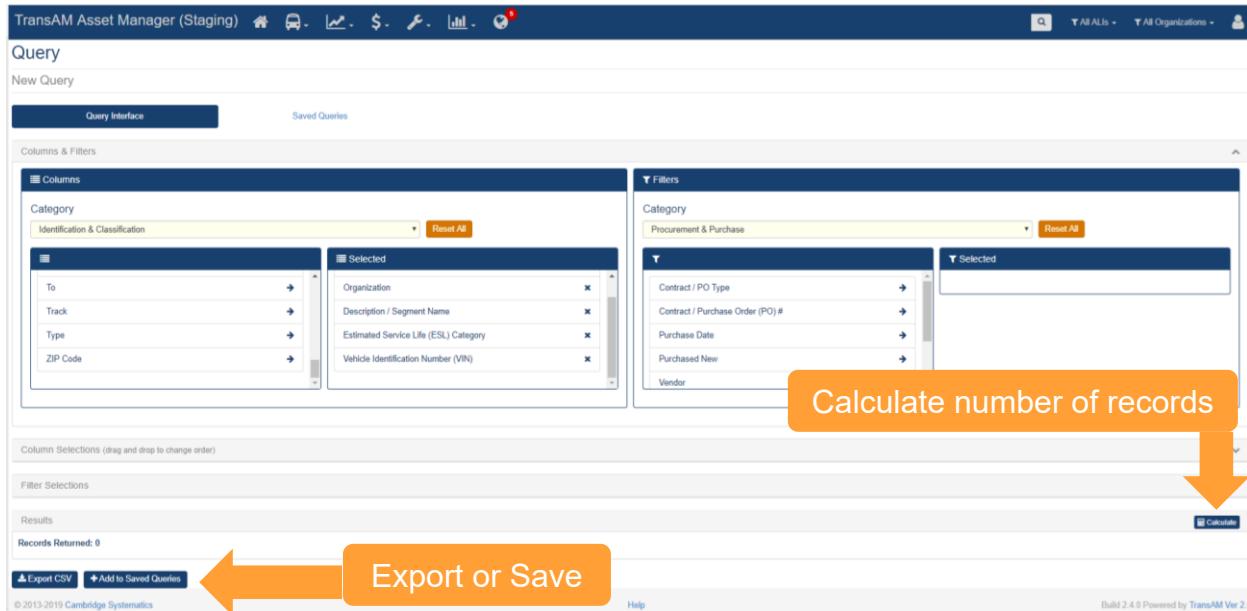
Figure 49 Filter Selection



Once the query is ready to be used, users can click the “Calculate” button in the results section to see how many records will be returned. Clicking the “Calculate” button is not required, but serves as a gauge to see if

the query that has been developed is returning the anticipated number of records. At this point, users can either export or save the query. If a user chooses to save a query, they will have the ability to share the query with users in associated or child organizations, so long as the user has a Manager user role.

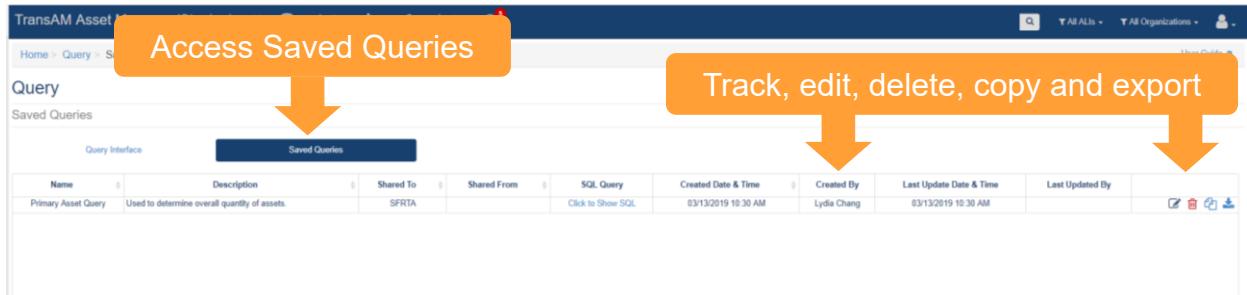
Figure 50 Calculate, Export or Save



Saved queries can be accessed by clicking on the Saved Queries button at the top of the screen. All queries save to the profile of the user initiating the save action. If a user has a Manager user role, the user is allowed to share the query with other users within any organization tied to the Manager. Parent organization users with a Manager role can share queries with associated child organizations as well. Shared queries can only be edited by a Manager from the “Shared From” organization. Shared queries from parent organizations cannot be deleted by child organizations, but queries shared by users within the same organization can be deleted from individual user profiles.

Additional query functionality includes the ability to export, edit, and copy queries, as well as copy the SQL statement, and monitor query history, all from within the saved queries section.

Figure 51 Saved Queries



4.8 Map

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

Figure 52 Asset Map

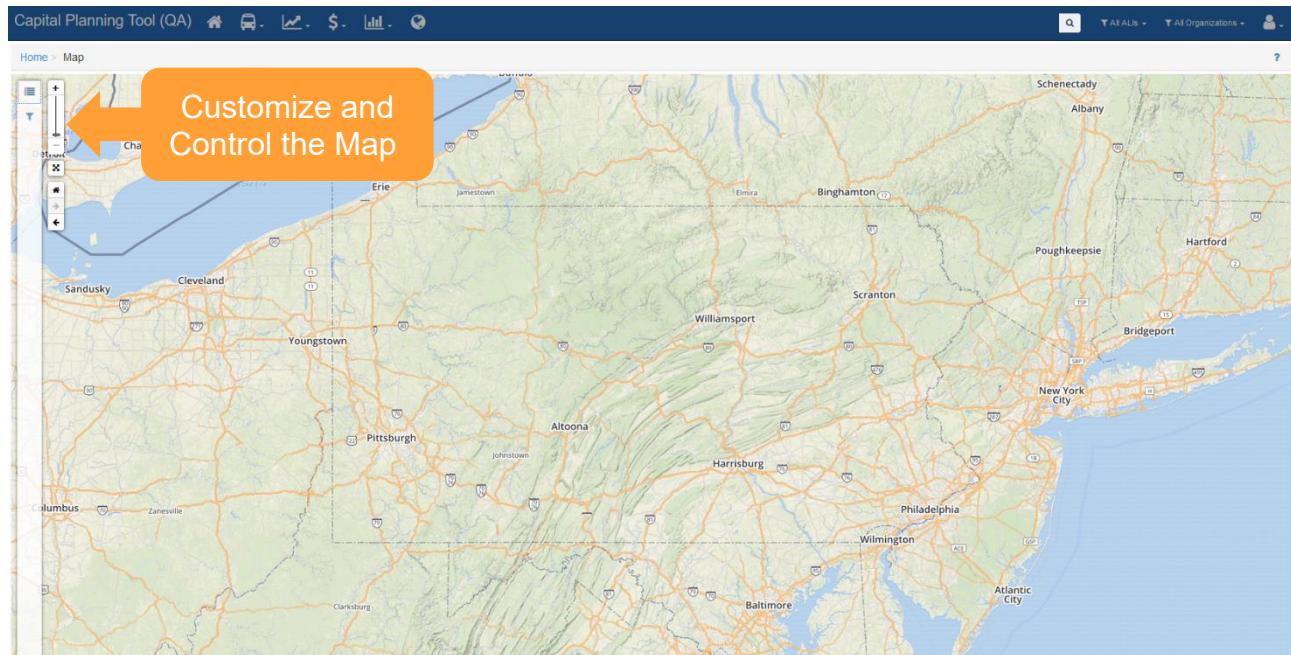
Type	Avg. Age
ACTS Revenue Vehicles	2.3
ACTS Support Facilities	2.0
ACTS Guideway	0.0
ACTS Power & Signal	0.0
ACTS Track	0.0
AMTRAN Revenue Vehicles	12.0
AMTRAN Stations/Stops/Terminals	11.0
AMTRAN Support Facilities	29.4
AMTRAN Support Vehicles	4.9
AMTRAN Maintenance Equipment	12.9
AMTRAN Facility Equipment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

Capital Projects
Revenue Vehicles
Equipment
Facilities
Infrastructure
Groups
Action Events
Map
Manage Overlay Services
+ Add Asset
Bulk Updates

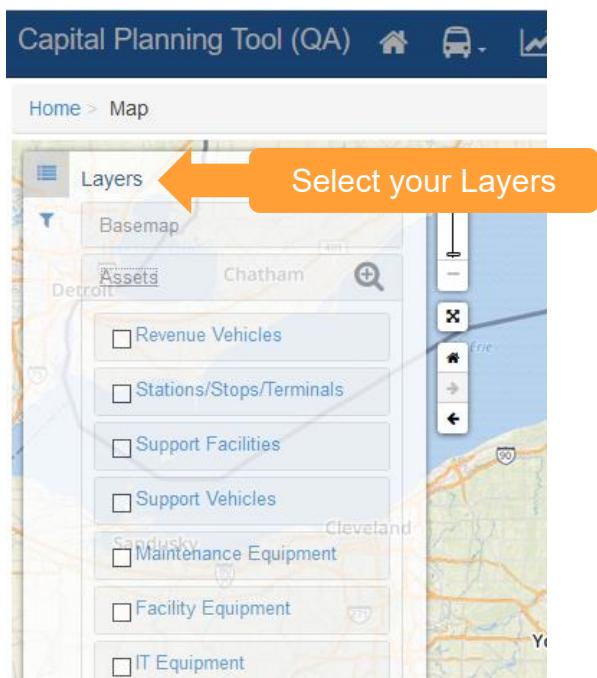
Agency
ACTS
AMTRAN
ATA
BARTA
BMC
BSS
BTA
BUTLER
CARBON
CARS
CAT
CATA*

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

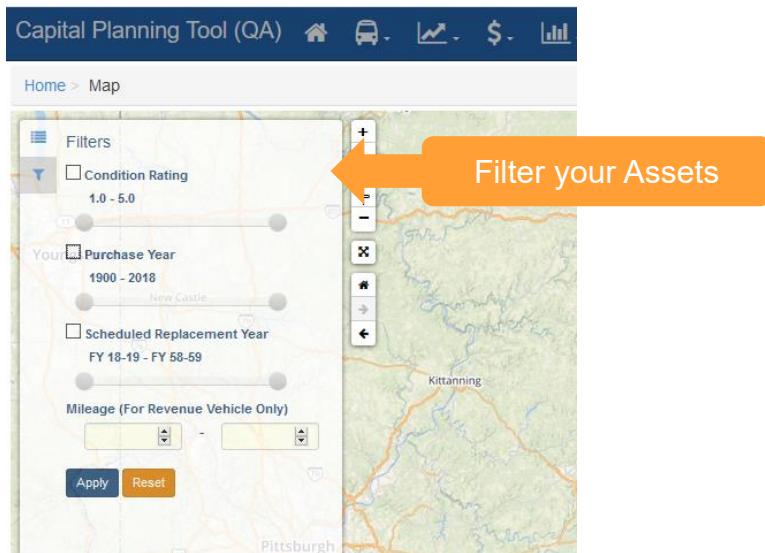
Figure 53 Map Customization



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

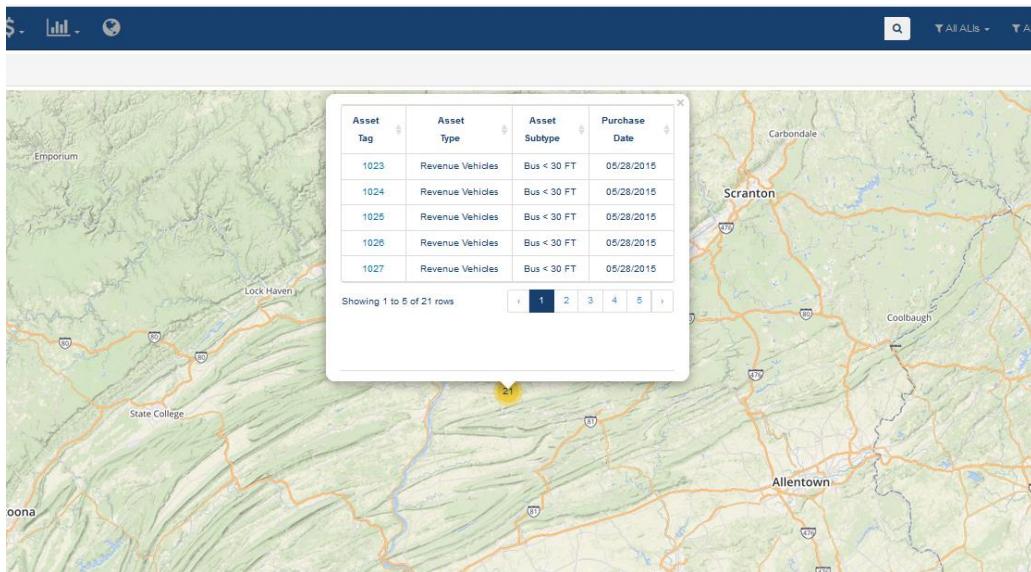
Figure 54 Map Layers

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

Figure 55 Map Filter

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

Figure 56 Map Asset Details



4.9 Groups

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

Figure 57 Asset Groups

Capital Planning Tool (QA)

- Home
- Asset Summary
- Type Avg. Age
- Revenue Vehicles
- Equipment
- Facilities
- Infrastructure
- Groups
- Action Events
- Map
- Manage Overlay Services
- + Add Asset
- Bulk Updates
- IT Equipment
- Office Equipment
- Communications Equipment
- Signals/Signs
- Guideway
- Power & Signal
- Track

Capital Projects

Agency	Num
buses that are 35ft in length	1
Fleet Plan Audit	1
Cumberland County	1
Maintenance Facility	1
Franklin County	1
Union-Snyder Counties	1
Columbia County	1
Montour County	1
Perry County	1
Disposal to Be Finalized	1
Manage Groups	1

Groups

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

Figure 58 Adding an Asset to a Group

The screenshot shows the Capital Planning Tool (QA) interface for a Revenue Vehicle Profile. The top navigation bar includes links for Home, Revenue Vehicles, Buses (Rubber Tire Vehicles), and Buses (Rubber Tire Vehicles) Profile. The main content area displays the Revenue Vehicle Profile for asset #1701, which is a CAT 35' Low Floor bus. The profile includes sections for Asset Summary, Profile (Identification & Classification, Characteristics, Funding, Procurement & Purchase, Operations, Registration & Title), and Events. A large orange arrow points from the left towards the 'Actions' dropdown menu on the right. The 'Actions' menu is open, showing options like Update, Edit, Add to group (which is highlighted with a blue background), Make a copy, Record final disposition, and Remove this asset.

5.0 Maintenance

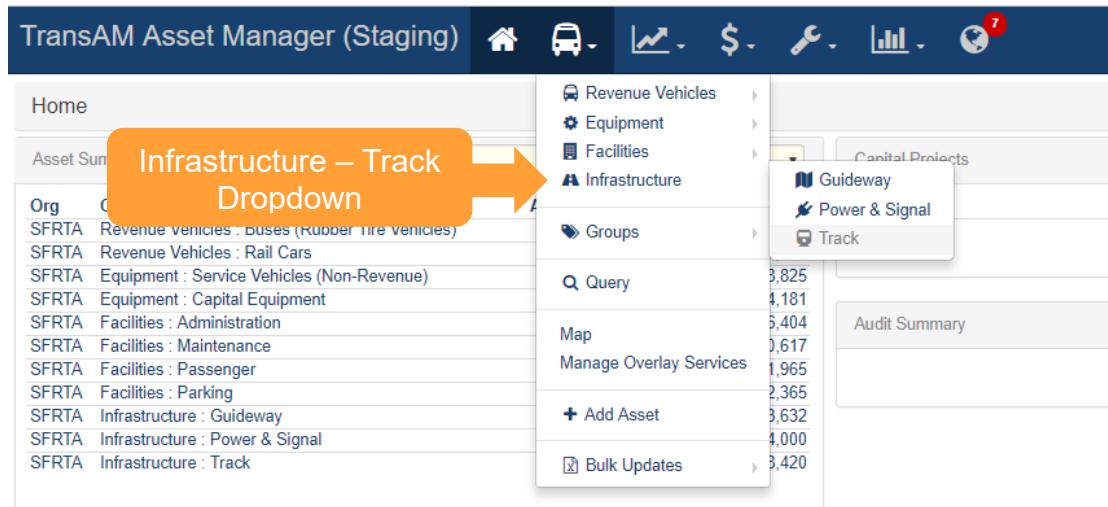
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

5.1 Performance Restrictions

Organizations that have Infrastructure – Track data in the asset inventory, can utilize the Performance Restrictions feature. This feature can be used to monitor daily, track-based speed restrictions or work restrictions on individual track segments. All restrictions must be reported utilizing the same linear reference method used for the Infrastructure – Track asset data.

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

Figure 59 Asset Inventory Dropdown : Infrastructure - Track



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

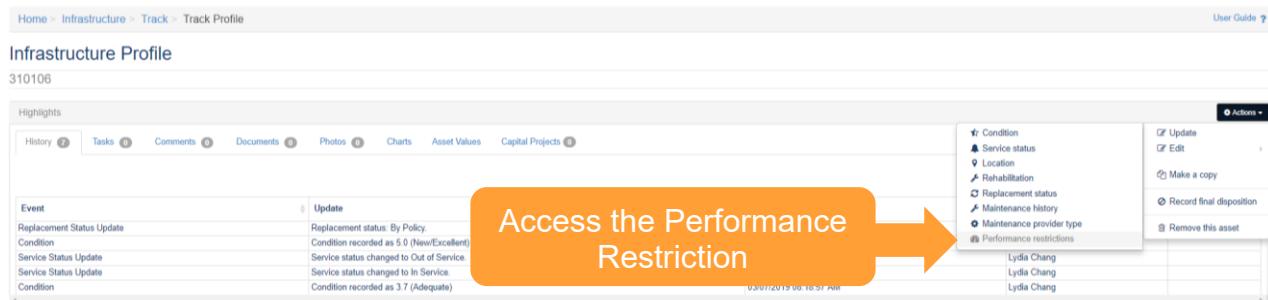
Figure 60 Existing Asset Interface : Infrastructure - Track

The screenshot shows the Existing Asset Interface for Infrastructure - Track. It displays a table of asset records with columns for Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. An orange arrow points from the text 'Access the Infrastructure – Track Record' to the 'Asset ID' column header. The table shows several rows of data, with the first few rows being for South Florida Rail Corridor assets.

Asset ID	Organization	Line (from)	From	Line (to)	To	Class	Subtype	Description	Main Line / Division	Branch / Subdivision	Track	Segment Type	Location	Last Life Cycle Action	Life Cycle Action Date	Status
310000	SFRTA								South Florida Rail Corridor	N/A	Main Line	Main Line	-	Service status	9/28/2018	In Service
310101	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310102	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310103	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310104	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Performance restrictions	3/6/2019	In Service
310105	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Rehabilitation	3/1/2019	In Service
310106	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Replacement status	3/1/2019	Out of Service
310107	SFRTA	SX	973.3	SX	974.3	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310108	SFRTA	SX	974.3	SX	974.4	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310109	SFRTA	SX	974.4	SX	975.1	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Performance restrictions	3/7/2019	In Service

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

Figure 61 Lifecycle Action Menu



When accessing the Performance Restriction Lifecycle Event, data associated with the track segment auto-populates the event fields, including the maximum permissible speed, which populates the speed restriction field. As a user, you can edit the speed restriction, and set the period of the restriction. The restriction period can be set to “Until Removed”, which means the restriction will be active until a user manually closes the restriction, or the restriction can be set for a specified period of time, to include hours, days or weeks. If the restriction is set to a specified period of time using “Set Length”, the restriction will automatically closeout upon expiration of the specified time period.

Users can also adjust the linear “From” and “To” marker post values (which were auto-populated from the track record), in order to modify the length of the restriction segment. Modifying the restriction length means the track restriction can be reported for more than one segment of track, even though the event was initiated from a single record. If the “From” or “To” value is extended beyond the “From” and “To” values of the initial reporting segment, all other associated linear segments covered under the new values will appear in the “Associated Linear Asset Records” section. Users can also submit restrictions utilizing on the “From” value, for single location restrictions, such as switch points and all restrictions must have a restriction cause selected.

Figure 62 Performance Restriction Lifecycle Event

The screenshot shows the 'Performance restrictions' form. It includes fields for Speed Restriction (79.0 mph), Segment Unit (Track 2), and linear coordinates (From: 971.9, To: 975.3 miles). The 'Associated Linear Asset Records' section lists 310107, 310108, 310109, and 310110. A note on the right explains the use of Performance Restriction Events. A large orange callout bubble with the text 'Submit the Performance Restriction' points to the 'Update Performance Restrictions' button at the bottom left.

Once a Performance restriction is submitted it appears in the Performance Restrictions section, along with all previously submitted restrictions, and can be managed by accessing the Maintenance Dropdown.

Figure 63 Maintenance Dropdown

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Assets, Reports, and Help. Below the navigation bar, a large orange arrow points from the left towards the 'Performance Restrictions' button in the top right corner of the main content area. The main content area displays several tables: 'Asset Summary' (listing various asset categories like Revenue Vehicles, Equipment, Facilities, etc., with columns for Org, Category : Class, Avg. Age, Count, and Cost), 'Capital Projects' (listing projects by Agency, Num. Projects, and Cost), and 'Audit Summary' (indicating 'No active audits found').

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

Figure 64 Performance Restriction Management

The screenshot shows the 'Performance Restrictions' management table. The table has a header row with columns for Status, Active Start, Active End, and other details. The body of the table contains 7 rows of data, each representing a performance restriction. The columns include Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. The 'Status' column for all rows shows 'Active'. The 'Comments' column for the first four rows shows a blue 'Closeout' button, while the last three rows show a dark blue 'Closeout' button. A small note at the bottom left says 'Showing 1 to 7 of 7 rows'.

6.0 Policies

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

Figure 65 Policies Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Money, and a globe. Below the navigation bar is a main content area. On the left, there is a table titled "Asset Summary" with columns for Type, Avg. Age, and Count. The table lists various asset types such as ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, etc. On the right, there is a "Policies" dropdown menu with options like "Capital Projects", "Project Planner", and "SOGR Capital Project Analyzer". A large orange arrow points from the text "Policies Dropdown" to the "Policies" option in the menu. Below the dropdown is a table titled "Capital Projects" with columns for Agency, Num. Projects, and Cost. The table lists several agencies with their respective project counts and costs.

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

Clicking “Policies” in the dropdown will display the Policy options that are available. Each individual policy also can be accessed through the submenu navigation options, by hovering over the policies selection in the main navigation dropdown.

Figure 66 Policy Rule Sets

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Money, and a globe. Below the navigation bar, the path "Home > Policies" is displayed. In the main content area, there are two cards. The first card is titled "Asset Replacement/Rehabilitation ..." and has a sub-label "Asset Replacement/Rehabilitation Policy". The second card is titled "TAM Policy" and has a sub-label "TAM Policy". A large orange arrow points from the text "Policy Rule Sets" to the "TAM Policy" card.

6.1 Asset Replacement/Rehabilitation Policy

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

Figure 67 Asset Replacement/Rehabilitation Policy

The screenshot shows the Capital Planning Tool (QA) interface. In the top navigation bar, there is a dropdown menu labeled "Policies" which is open. Inside this dropdown, under the "Asset Replacement/Rehabilitation Policy" section, the "TAM Policy" option is highlighted. A large orange callout bubble with the text "Asset Replacement/Rehabilitation Selection" points to this highlighted item. The main content area displays a table of asset data, and the bottom right corner has a button labeled "Audit".

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

Figure 68 Asset Replacement/Rehabilitation Policy Filters

The screenshot shows the "Asset Replacement/Rehabilitation Policy" filters page. At the top, there is a "Filters" section with two dropdown menus: "Organization" (set to "BPT-PennDOT Bureau of Public Transportation") and "Policy Year" (set to "FY 2017 Statewide Transit Policy (Current)"). Below these, there is a table with various policy settings. Two orange arrows point upwards from the "Organization Filter" and "Policy Year" labels towards their respective dropdowns. A third orange arrow points upwards from the "Actions" button at the top right towards the table header.

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

Figure 69 Policy Rules

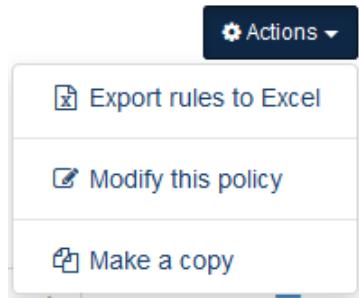
The screenshot shows the 'Policy Rules' page with the following details:

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

A large orange arrow-shaped callout points to the 'Actions' button in the top right corner.

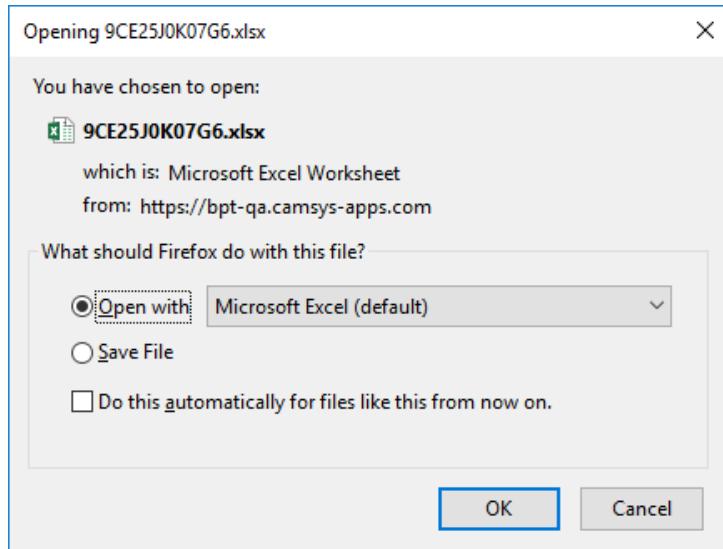
The Actions button will display a list of options as shown.

Figure 70 Policy Rules Actions Dropdown



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

Figure 71 Export rules to Excel (Windows dialog box)



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

Figure 72 Modify (Update) Organization Policy Dialog

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 73 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 74 Asset Types

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

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

Figure 75 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 76 Asset Type Rules

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

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

Figure 77 Edit Icon



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

Figure 78 Modify Asset Policy Rule

Modify Rule: IT Equipment

* Service Life Calculation Type * Replacement Cost Calculation Type Condition Rollup Calculation Type

 * Annual Inflation Rate * Pct Residual Value * Condition Rollup Weight

 Save 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 79 Asset Type and Asset Subtype rules

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

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

Figure 80 Modify Asset Subtype Rule

* ESL (Mo) * Replacement Cost * Cost FY

 Replace With New
 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 81 Remove Asset Subtype Rule

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

[Cancel](#) [Yes](#)

6.2 TAM Policy

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

Figure 82 TAM Policy Dropdown Menu Selection

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, Policies, Asset Replacement/Rehab, and TAM Policy. The TAM Policy icon is highlighted with an orange arrow and a callout bubble labeled "TAM Policy Selection". Below the navigation bar, there are two main sections: "Asset Summary" and "Policies". The "Asset Summary" section displays a table of asset data, including Type, Avg. Age, Count, Cost, and Book Value. The "Policies" section displays a table of projects with columns for Num. Projects and Cost. An orange arrow points from the "TAM Policy Selection" callout to the TAM Policy icon in the navigation bar.

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	3.3	23	\$1,150,393	\$1,150,393
ACTS Support Facilities	2.0	1	\$403,440	\$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

	Num. Projects	Cost
BARTA	2	\$230,000
BCT	5	\$1,287,100
BCTA	11	\$2,156,774
BMC	2	\$6,387,280
BSS	3	\$1,843,909
BTA	3	\$236,000
BUTLER	1	\$97,020
CARBON	7	\$528,432
CARS	1	\$9,003,734
CAT	1	\$100,000
CATA*	4	\$570,000
CATA**	1	\$134,239
CATA***	4	\$6,555,761
CATA****	2	\$2,570,000

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 83 TAM Policy Performance Measures

TAM Policy

Group Management Group Metrics **Performance Measures**

Performance Measures

Filters

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

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 84 Policy Year Filters

Filters

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

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 85 Asset Type Percentage Settings

Asset Category	Group Name	Agency Status
Revenue Vehicles	New Group	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 86 Activate Performance Measures

TAM Policy

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

7.0 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 87 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	
\$956,840,985	\$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	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 ⓘ

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

Figure 88 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 89 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		Actions	Description	Activity Line Items 0	Supporting Documents 0	Comments 0
Project Number	AMTRAN 18-19 #6087		Project Description			
Fiscal Year	FY 18-19		test			
Scope	125		Justification			
Total Cost	\$0					
Type	Replace					
SOGR	No					
Shadow	No					
Multi year	No					
Emergency	No					
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 90 Add an ALI

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Projects, Reports, Budget, and Dashboards. Below it, a breadcrumb trail shows 'Home > Capital Projects > AMTRAN 18-19 #6126'. A green message box says 'Capital Project AMTRAN 18-19 #6126 was successfully created.' On the left, a 'Manual Capital Project' card displays project details: Project Number AMTRAN 18-19 #6126, Fiscal Year FY 18-19, Scope 111, and Total Cost \$0. To the right, there are tabs for Description, Activity Line Items (with a count of 0), Supporting Documents (0), and Comments (0). A large orange arrow points from the text 'From the window that appears, you can specify ALI details.' to the '+ Add Line Item' button in the 'Activity Line Items' section.

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

Figure 91 Add an ALI Details

This screenshot shows the 'New Activity Line Item' dialog box for project 'AMTRAN 18-19 #6126'. The dialog contains several input fields: 'Category' (dropdown), 'TEAM ALI Code' (dropdown), 'Cost Estimate' (\$0), 'Fiscal Year' (FY 18-19), 'Replace with New' (radio buttons for Yes or No), 'Count' (dropdown), 'Fuel Type' (dropdown), 'Length' (dropdown), and 'Name' (text input field). At the bottom are 'Create Activity Line Item' and 'Cancel' buttons. The background shows the same Capital Planning Tool interface as Figure 90, with the 'Activity Line Items' tab selected and a message about a successful project creation.

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

8.0 Project Planning

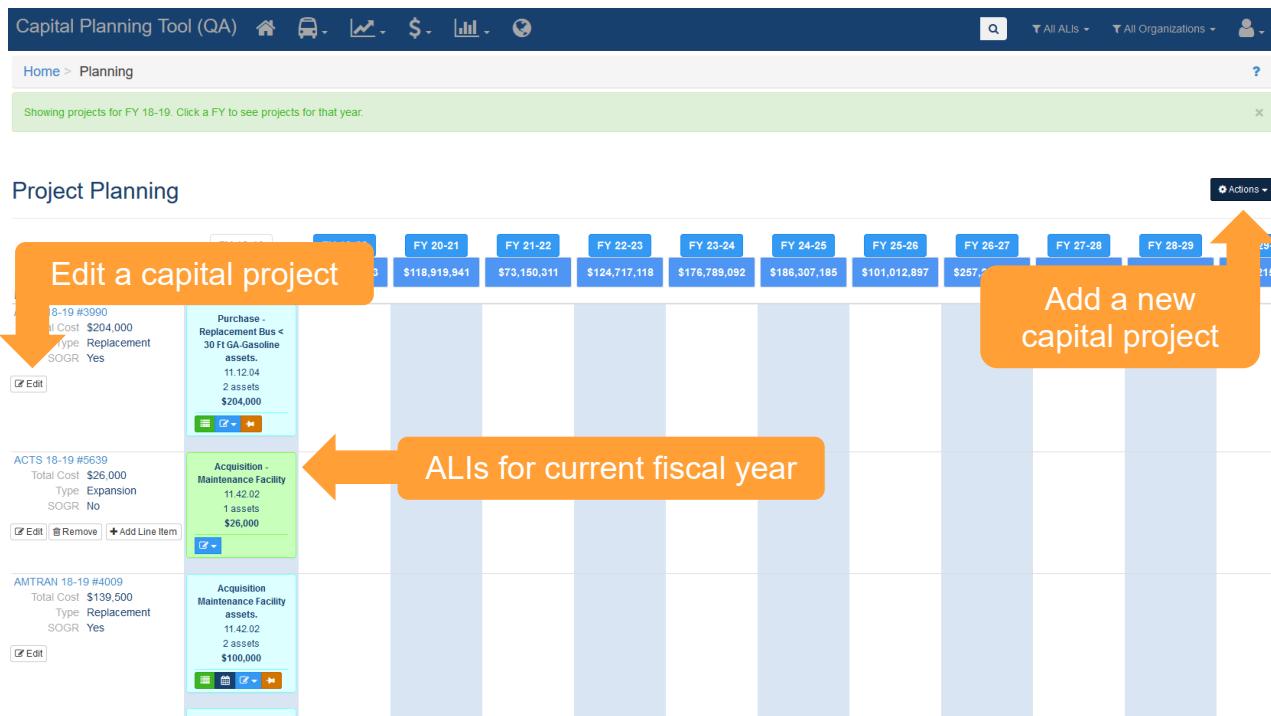
8.1 Project Planner

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

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

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

Figure 92 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 93 Edit Manually Created Capital Projects

Capital Planning Tool (QA) Home Planning ?

Showing projects for FY 18-19. Click a FY to see projects for that year.

Project Planning

	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
Project	\$946,561,897	\$355,781,113	\$118,919,941	\$73,150,311	\$124,717,118	\$176,789,092	\$186,307,185	\$101,012,897	\$257,203,755	\$174,267,299	\$396,952,612	\$190,215
ACTS 18-19 #3990 Total Cost \$204,000 Type Replacement SOGR Yes	Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04											
ACTS 18-19 #3999 Total Cost \$5,000 Type Expansion SOGR No	Acquisition - Maintenance Facility 11.42.02 1 assets \$26,000											
AMTRAN 18-19 #4009 Total Cost \$139,500 Type Replacement SOGR Yes	Acquisition - Maintenance Facility assets. 11.42.02 2 assets \$100,000											

Remove a project or add an ALI

Edit ALI cost, milestones, view funding data, or remove an ALI

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 94 Edit SOGR Capital Projects

Capital Planning Tool (QA) Home Planning ?

Showing projects for FY 18-19. Click a FY to see projects for that year.

Project

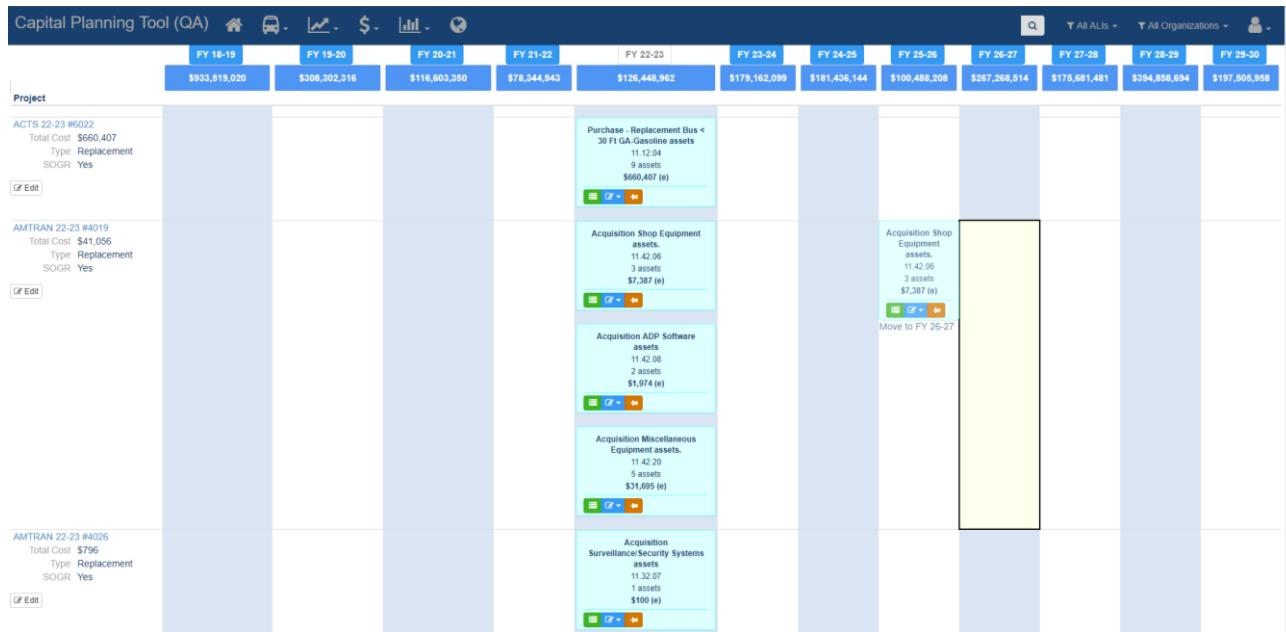
ACTS 18-19 #3990 Total Cost \$204,000 Type Replacement SOGR Yes	Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04 2 assets \$204,000
AMTRAN 18-19 #3999 Total Cost \$5,000 Type Expansion SOGR No	Acquisition - Maintenance Facility 11.42.02 1 assets \$26,000
AMTRAN 18-19 #4009 Total Cost \$139,500 Type Replacement SOGR Yes	Acquisition - Maintenance Facility assets. 11.42.02 2 assets \$100,000

Edit SOGR project details

Edit ALI assets, update cost, milestones, view funding data, remove an ALI and pin ALIs

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 95 Prioritize Projects
Move ALIs to Different Years



8.2 State of Good Repair (SOGR) Capital Project Analyzer

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

Figure 96 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...

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 97 SOGR Capital Project Analyzer Processing

Capital Planning Tool (QA)

Home > Capital Projects

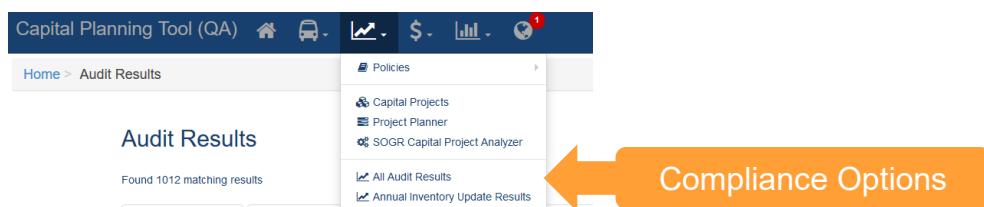
SOGR Capital Project Analyzer is running. You will be notified when the process is complete.

9.0 Compliance

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

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

Figure 98 Compliance Options



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

Figure 99 Audit Results

A screenshot of the Capital Planning Tool (QA) interface showing the "Audit Results" page. The top navigation bar includes icons for Home, Audit Results, Policies, Capital Projects, Project Planner, and SOGR Capital Project Analyzer. Below the navigation is a breadcrumb trail: Home > Audit Results. The main content area is titled "Audit Results" and shows a message: "Found 1012 matching results". To the right of the content area, there are several filter options: "Revenue Vehicles", "failed", "Annual Inventory Update", and a dropdown menu. A callout bubble with an orange arrow points to the "Audit" column header, which is highlighted with a red box. The callout bubble contains the text "Export Results". Another callout bubble with an orange arrow points to the filter options, which are highlighted with a red box. The callout bubble contains the text "Filter Results". In the bottom right corner, there is a light blue callout bubble containing the text: "Remember to check the appropriate boxes to export the rows you desire".

10.0 Funding

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

10.1 Programs

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

Figure 100 Available Funding Programs

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a table titled 'Asset Summary' with columns for Type, Avg. Age, Count, and Cost. In the center, there's a 'Fund Projects' section with a table showing 'Name', 'FY 18-19', 'Num. ALIs', and 'Cost'. On the right, a dropdown menu is open under 'Programs' with categories like 'Federal', 'State', and 'Local'. At the bottom left, there's a button labeled 'Add 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 101 Funding Program Details

The screenshot shows the 'Funding Programs' details for program \$5307. The left panel displays basic program information: Type (Federal), Formula (checked), Inflation Rate (0.000%), Pct Match (80.000%), and Life of \$ (years) (5). The right panel is titled 'Details' and contains tabs for Details, Templates (2), Buckets (21), Assets (827), Documents (0), and Comments (0). An orange callout bubble labeled 'Additional Program Information' points to the 'Details' tab.

11.0 Reports

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

Figure 102 Reports Dropdown

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

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

Figure 103 Report Exports

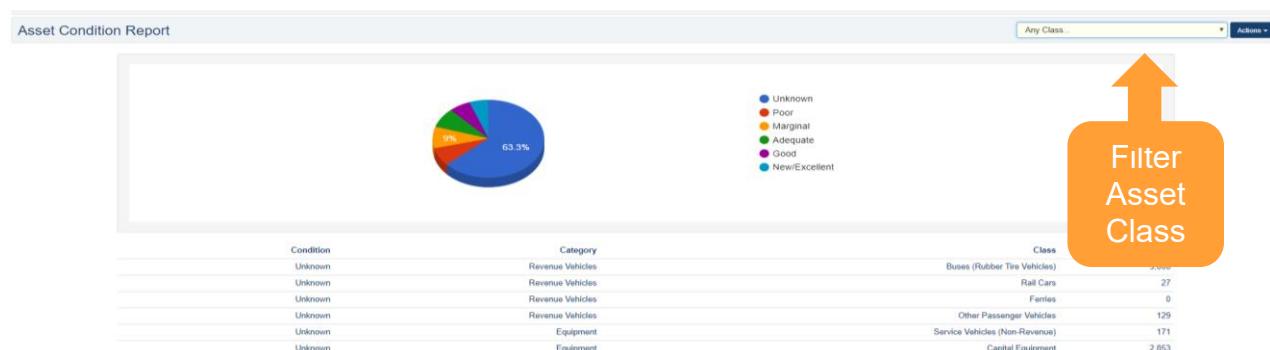
The screenshot shows a report interface with a green search icon and a blue 'Actions' button with a dropdown arrow. A dropdown menu is open, listing three options: 'Print to PDF', 'Export as CSV', and 'Export Underlying Data'. An orange callout bubble surrounds the 'Actions' button and the 'Export' options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

11.1 Inventory Reports

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

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

Figure 104 Asset Condition Report



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

Figure 105 Asset Age Report



The Asset Funding Source Report computes for every funding program, organization (agency), year of purchase, the number of assets that were purchased using a particular funding program as well as the cost (purchase amount) associated with that particular funding program. Drill-down functionality allows the user to see the exact lists of assets, and the dollars spent on each asset for that funding source. Multiple filtering options are available, providing the ability to filter by multiple combinations of data:

- Agency, Funding Program.
- Agency, Funding Program, Year of Purchase.
- Funding Program, Agency.
- Funding Program, Agency, Year of Purchase.
- Funding Program, Year of Purchase.
- Funding Program, Year of Purchase, Agency.
- Year of Purchase, Funding Program.
- Year of Purchase, Funding Program, Agency.

Figure 106 Asset Funding Source Report



11.2 Capital Needs Reports

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

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

Figure 107 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 108 Unconstrained Capital Projects Report



11.3 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 Revenue Vehicle Replacement Report finds and displays summary data for all revenue vehicles that are scheduled to be replaced within a specified year.

Figure 109 Revenue Vehicle Replacement Report

Revenue Vehicle Replacement Report						
				Jump to...	Fiscal Year	FY 19-20
All Transit Operators						
Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	\$220,647	\$1,032,574
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	28	\$10,703,185	\$15,351,540
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	156	\$33,434,345	\$64,564,155
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	151	\$25,090,859	\$65,899,722
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	404	\$22,996,202	\$117,170,310
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	59	\$12,696,894	\$20,638,200
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std	2	\$485,086	\$717,256
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	936	\$24,409,851	\$24,272,352
FY 19-20	Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	71	\$112,539,277	\$25,462,588

The State of Good Repair Report finds and displays summary data for all asset subtypes that are scheduled to be replaced across all planning years. The report is the same as the Revenue Vehicle Replacement Report except it is not limited to revenue vehicles and rolls up values across all planning years.

Figure 110 State of Good Repair Report

State of Good Repair Report						
				Jump to...	Actions	
State of Good Repair: All Transit Agencies						
Category	Class	Sub Type		Count	Book Value	Replacement Cost
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Articulated		11	\$6,197,520	\$8,414,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT		438	\$138,243,902	\$189,321,201
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon		27	\$416,191	\$1,476,958
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban		161	\$67,597,460	\$92,477,734
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT		623	\$208,254,531	\$265,018,765
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT		736	\$53,347,885	\$217,175,923
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT		154	\$35,377,187	\$55,183,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van		1,204	\$36,625,492	\$31,357,436
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std		31	\$8,585,473	\$12,003,406
Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer		100	\$167,850,515	\$36,271,696
Revenue Vehicles	Rail Cars	Light Rail Car		9	\$25,638,417	\$3,087,370
Revenue Vehicles	Rail Cars	Commuter Locomotive Diesel		20	\$74,188,285	\$65,980,817
Equipment	Service Vehicles (Non-Revenue)	Pickup/Utility Truck		75	\$436,717	\$2,616,326
Equipment	Service Vehicles (Non-Revenue)	Sports Utility Vehicle		65	\$693,546	\$2,303,917
Equipment	Service Vehicles (Non-Revenue)	Van		79	\$729,509	\$2,272,877
Equipment	Service Vehicles (Non-Revenue)	Sedan/Station Wagon		62	\$437,762	\$1,546,568
Equipment	Service Vehicles (Non-Revenue)	Other Support Vehicle		31	\$212,606	\$1,610,645
Equipment	Service Vehicles (Non-Revenue)	Tow Truck		2	\$0	\$344,361
Equipment	Capital Equipment	Bus Maintenance Equipment		1,033	\$7,860,493	\$11,975,400
Equipment	Capital Equipment	Other Maintenance Equipment		140	\$11,904,184	\$16,743,063
Equipment	Capital Equipment	Rail Maintenance Equipment		2	\$73,195	\$1,180,195
Equipment	Capital Equipment	Other Facilities Equipment		416	\$3,164,904	\$5,017,581

The Disposition Report finds and displays summary data for all asset subtypes that are scheduled to meet their Estimated Service Life within a particular fiscal year and are ready to be disposed.

Figure 111 Disposition Report

Disposition Report						
				Jump to...	Fiscal Year	FY 18-19
All Transit Operators						
Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	9	\$3,138,453	\$4,819,364
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	1	\$265,314	\$426,977
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	3	\$679,554	\$1,037,982
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1	\$29,493	\$25,649
FY 18-19	Equipment	Capital Equipment	Other Facilities Equipment	2	\$143	\$208
FY 18-19	Equipment	Capital Equipment	Other Communications Equipment	1	\$0	\$0
Totals for FY 18-19				17	\$4,112,957	\$6,310,180

The Asset Service Life Summary Report displays all asset categories, listed by subtype, and calculates the quantity and percentage of assets that are past their Estimated Service Life in month, miles, and the quantity and percentage that have fallen below the TERM threshold as set in the Asset Replacement/Rehabilitation Policy. Data can be filtered by Asset Category, and by a minimum and maximum range in months of assets

beyond their Estimated Service Life. A drill-down of data is provided on an organization-level basis, while the table, and the underlying data used to make the calculations can be exported as well.

Figure 112 Asset Service Life Summary Report

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%		
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 113 TAM Service Life Summary Report

Organization	Asset Classification Code	Quantity	# At or Past ULB/TERM	Pcnt	Avg Age	Avg TERM Condition	Total 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

12.0 Specialized Reports

12.1 Asset Fleet Builder

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

The Asset Fleet Builder is a tool specifically designed to assist with the creation of the Revenue Vehicles (A-30), and Service Vehicles (Nonrevenue) (A-35) National Transit Database (NTD) asset reports. Both of these NTD asset forms require data be reported by fleet, and the Asset Fleet Builder provides an interface to auto-create and easily manage both Revenue Vehicle and Service Vehicle (Nonrevenue) fleets.

When building fleets for the first time, you can choose to use the Asset Fleet Builder. The builder analyzes organization inventories and automatically groups assets into fleets based on the unique fleet definitions and sorts those assets into either the Revenue Vehicles or Service Vehicles section. All assets grouped within a fleet will no longer be listed within the Orphaned Assets portion of the Manage Fleets section. When you run the builder, it will function as a background job in the system and notify you once complete in the notifications section. From there, users can review the fleets, add fleet-specific information or manually regroup assets as needed.

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

Figure 114 Asset Fleet Builder

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

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

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

Build Revenue or Support Fleets

Build Revenue Vehicles Fleets

Build Support Vehicles Fleets

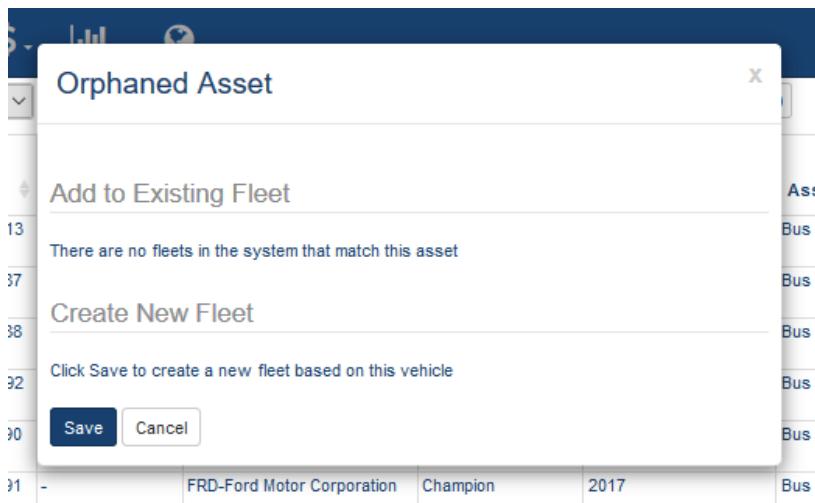
When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 115 Asset Fleet Builder—Orphaned Assets

The screenshot shows the 'Fleets' section of the Capital Planning Tool (QA). At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is selected. Below it, the 'Orphaned Assets' section is displayed with a 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. On the right side of the table, there is a large orange button labeled 'Add Asset to Fleet'. An orange arrow points from the 'Manage Fleets' tab to the 'Orphaned Assets' section. Another orange arrow points from the 'Add Asset to Fleet' button to the 'Add Asset to Fleet' link in the modal.

Agency	Asset Type	Tag	ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGGB2713H3188913	-	GIL-Gillig Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	+ Add to Fleet
CAT	Revenue Vehicles	#271	PT Bus #271	1FDDE4FS8HDC18987	-	FRD-Ford Motor Corporation	Champion				In Service	+ Add to Fleet
CAT	Revenue Vehicles	#272	PT Bus #272	1FDDE4FS8HDC18988	-	FRD-Ford Motor Corporation	Champion	2017			In Service	+ Add to Fleet
CAT	Revenue Vehicles	#273	PT Bus #273	1FDDE4FSXHDC18992	-	FRD-Ford Motor Corporation	Champion				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 116 Adding an Orphaned Asset to a Fleet

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

Figure 117 Adding a New Fleet

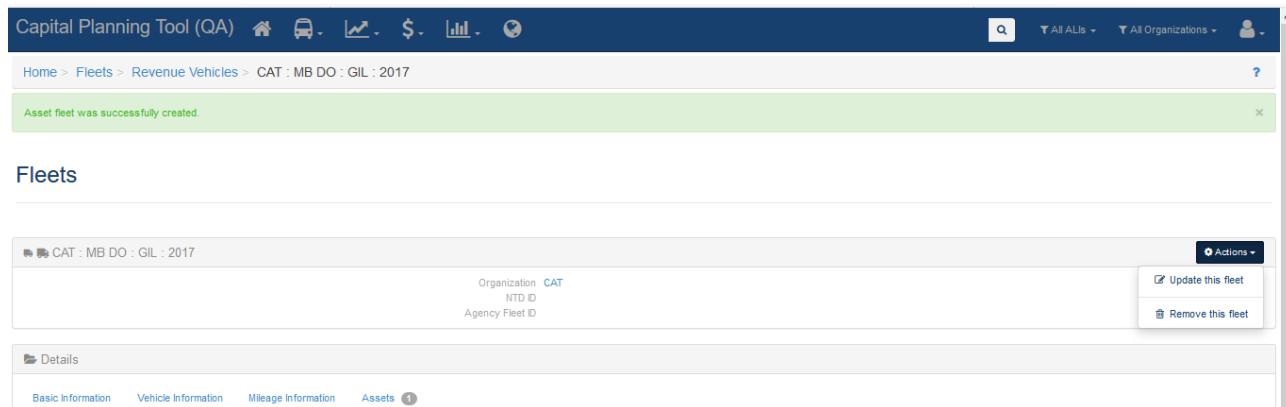


Figure 118 Update Asset Fleet Details

Update Asset Fleet

This is a modal dialog box titled "Update Asset Fleet". It contains three input fields: "NTD ID" with value "0", "Agency Fleet ID" (empty), and "NTD Notes" (empty). At the bottom are two buttons: "Update Asset fleet" (blue) and "Cancel" (orange).

Figure 119 Update Odometer Readings

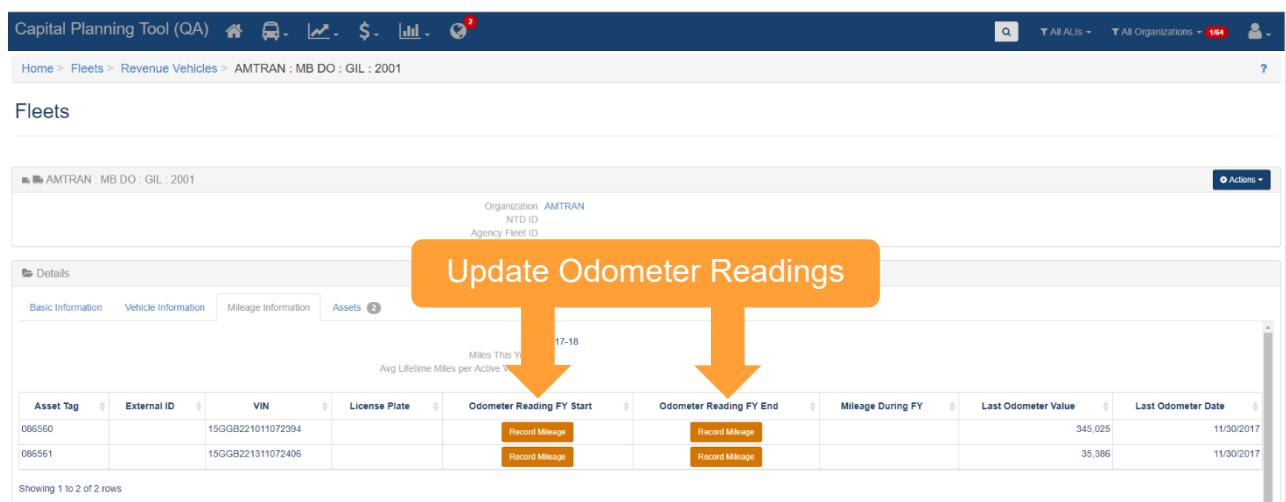


Figure 120 Remove or Add Assets from within a Fleet

The screenshot shows a web-based application interface for fleet management. At the top, there's a navigation bar with links for Home, Fleets, Revenue Vehicles, and specific filters for AMTRAN, MB DO, GIL, and 2001. Below this is a header for 'Fleets' with a sub-header for 'AMTRAN : MB DO : GIL : 2001'. The main content area displays a table of assets with columns for Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of data are shown: one with Asset Tag 086561 and another with 086560. The 'Action' column contains icons: a red minus sign for row 086561 and a green plus sign for row 086560. An orange callout box with the text 'Add or Remove Assets' has an arrow pointing to the green plus sign icon.

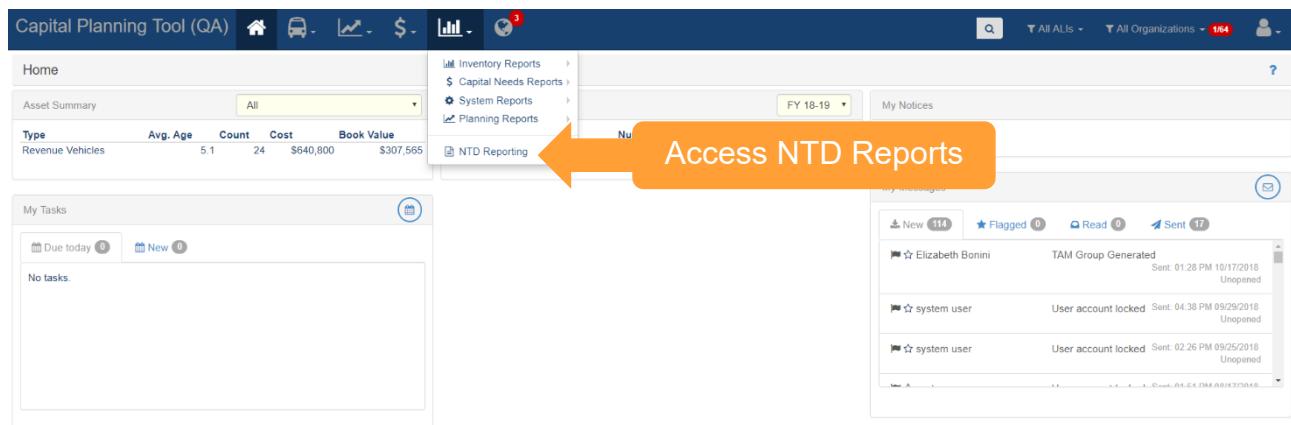
Asset Tag	External ID	VIN	License Plate	Title Number	Status	Emergency Contingency	ADA Accessibility	ULB	Mileage	Valid in Fleet	Action
086561	15GGB221311072406				In Service	No	No		35386	Yes	
086560	15GGB221011072394				In Service	No	No		345026	Yes	

12.2 NTD Asset Reports

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

- Facilities (A-15) — Pulls asset data for primary facilities.
- Infrastructure (A-20) — Pulls asset data for infrastructure assets, and produces a separate report for each Primary Mode/Type of Service unique combination.
- Revenue Vehicles (A-30) — Pulls asset data for revenue vehicles, which are included as part of a fleet.
- Service Vehicles (Non-revenue) (A-35) — Pulls asset data for Service Vehicle (Non-Revenue), which are included as part of a fleet.
- Performance Measure Targets (A-90) — Pulls ULB, TERM value, and goal percentages for the TAM Policy associated with the corresponding NTD Report year, and calculates performance.

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

Figure 121 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 122 Table of Previously Generated NTD Reports

The screenshot shows the 'NTD Reporting' page. At the top, there's a breadcrumb trail: Home > Forms > NTD Reporting. Below the breadcrumb, there's a search bar and a date selector set to 'FY 16-17'. The main content area features a table with columns: Organization, Fiscal Year, Status, Created At, and Creator. One row is visible, showing 'CARBON' as the organization, 'FY 16-17' as the fiscal year, 'Unsubmitted' as the status, '10:41 AM 10/19/2018' as the created at time, and 'Elizabeth Bonini' as the creator. Two orange arrows point from the bottom left towards the 'New NTD Form' button and the table rows.

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

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

Figure 123 Create New Reporting Year Forms

New NTD Report

Organization
BUTLER-Butler County Community Public Transportation

Fiscal Year
FY 2016 - 2017

Agency Information

Reporter Name
Elizabeth Bonini

Reporter Title

Reporter Department

Reporter Email
ebonini@pa.gov

Reporter Phone
9999999999

Reporter Phone Ext

Save NTD Form

Click Save NTD Form Button

Figure 124 NTD Report Details and Data

CARBON FY 16-17

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

Actions

submit this form

New version

Remove this form

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

Details

Versions History

Date	Creator	Download	Comments	Process Log
10:41 AM 10/19/2018	Elizabeth Bonini	Unsubmitted	[empty]	[empty]

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 125 Download each NTD Form

Success

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

Download A-15

Download A-20

Download A-30

Download A-35