

TransAM

Administrative User

User Guide

prepared for

Virginia Department of Rail & Public Transportation (DRPT)

prepared by

Cambridge Systematics, Inc.

user guide

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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.

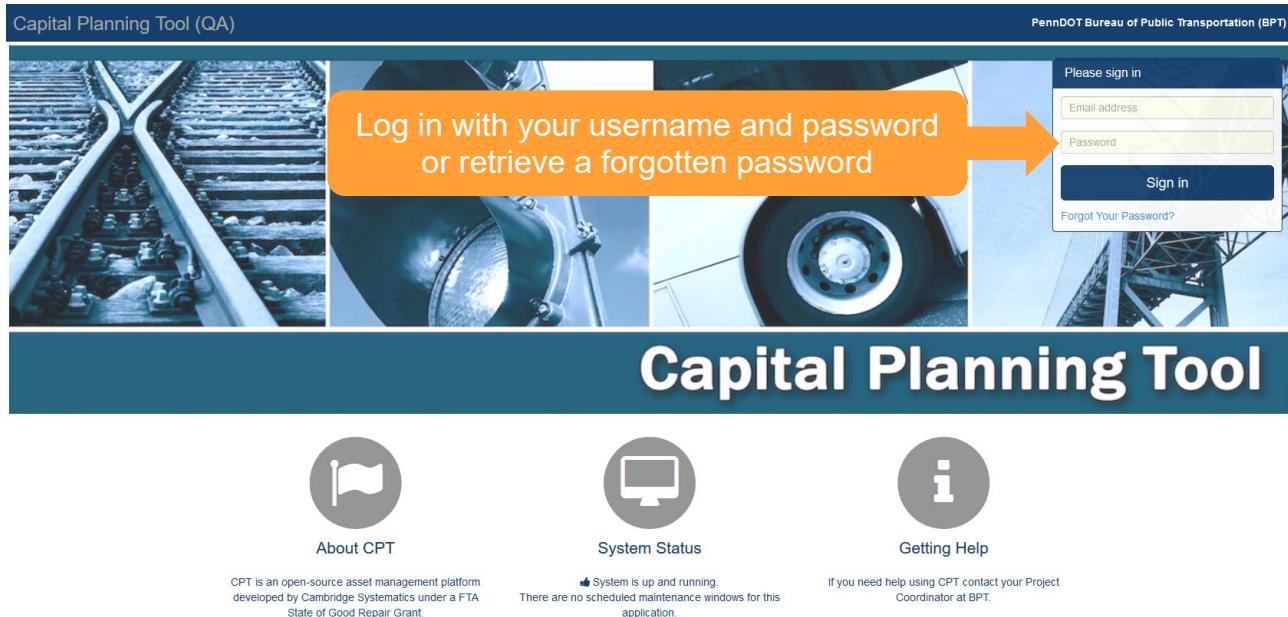
Figure 2 Set/Reset Password Screen

1.2 Ongoing Site Access

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



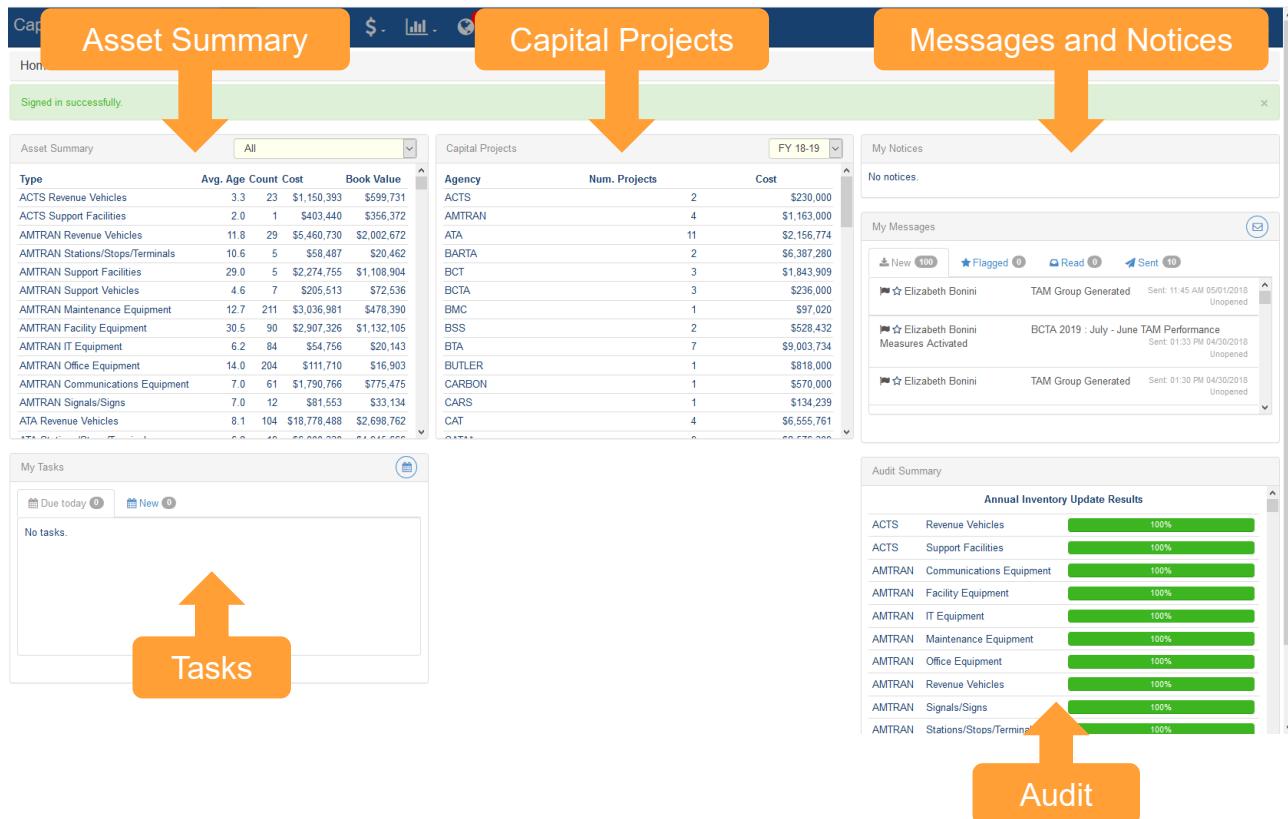
2.0 Dashboard

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.

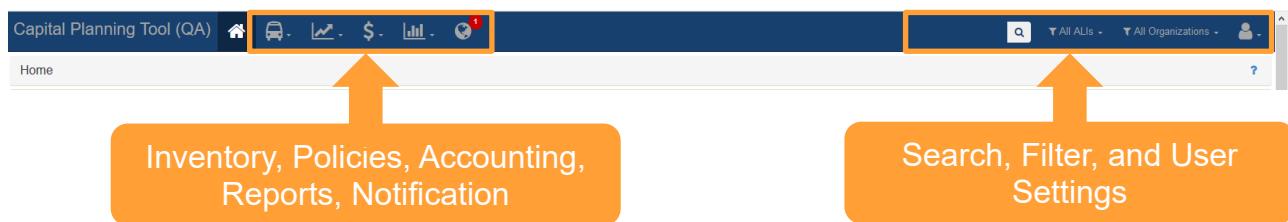
Figure 4 Dashboard Elements



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.

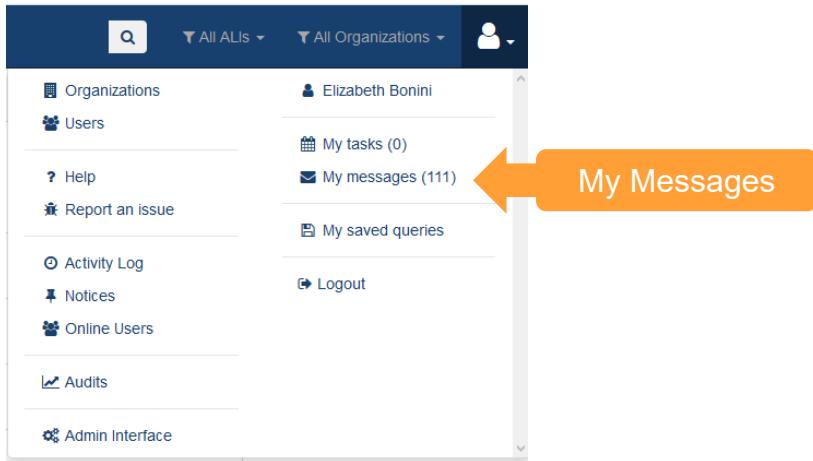
Figure 9 Filter Icon



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.

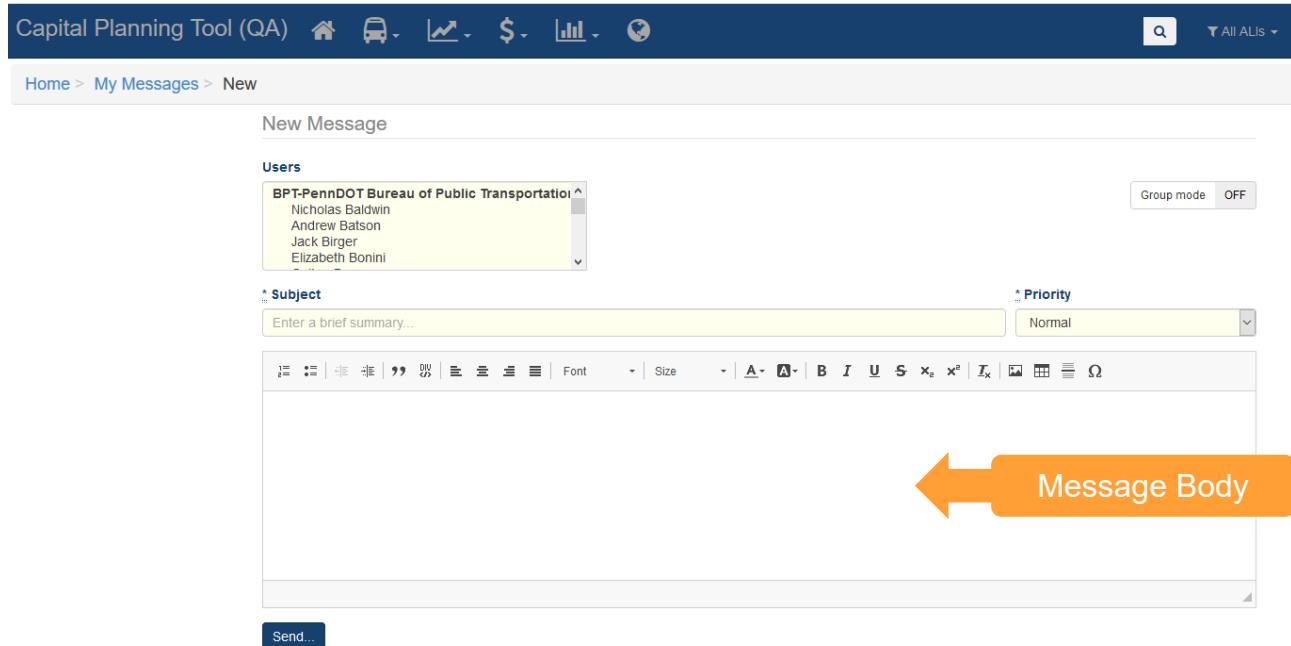
Figure 11 Messages

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, Compose, New (111), Flagged (0), Inbox (0), and Sent (0). A table lists three messages from 'system user': 'User account locked' (Sent: 01:51 PM 08/17/2018, Unopened), 'User account locked' (Sent: 12:22 PM 07/15/2018, Unopened), and 'User account locked' (Sent: 11:21 AM 07/15/2018, Unopened).

| From | Subject | Sent |
|-------------|---------------------|------------|
| system user | User account locked | 08/17/2018 |
| system user | User account locked | 07/15/2018 |
| system user | User account locked | 07/15/2018 |

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

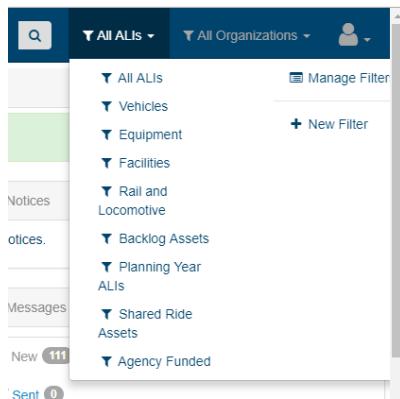
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

Figure 13 ALI Filter



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

Figure 14 ALI Filters



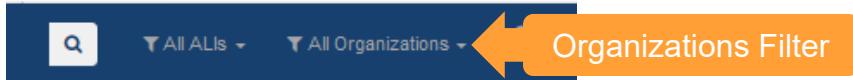
To create a new filter, select “New Filter” and specify the details required.

Figure 15 New ALI Filter

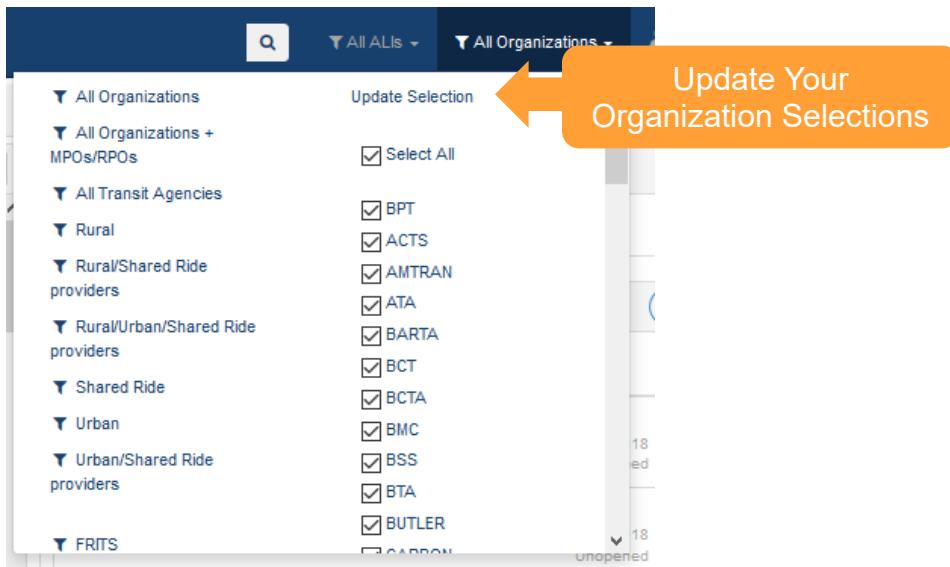
The screenshot shows the 'New ALI Filter' interface. On the left, there's a sidebar with 'Home > ALI Filters > New'. The main area has two columns. The left column contains fields for 'Name' (with placeholder 'Enter a name for this filter'), 'Description' (with placeholder 'Enter a description for this filter'), and 'Shared With' (radio buttons for 'No One', 'BPT', and 'All Organizations'). The right column contains 'Parameters' sections for 'Type' (dropdown), 'SOGR' (dropdown set to 'All'), 'Scope' (dropdown), 'Project Location' (dropdown), 'Asset Type' (dropdown), 'Asset Subtype' (dropdown), 'Owner' (dropdown), 'Funding' (dropdown), and checkboxes for 'In Backlog' and 'Not fully funded'. 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.

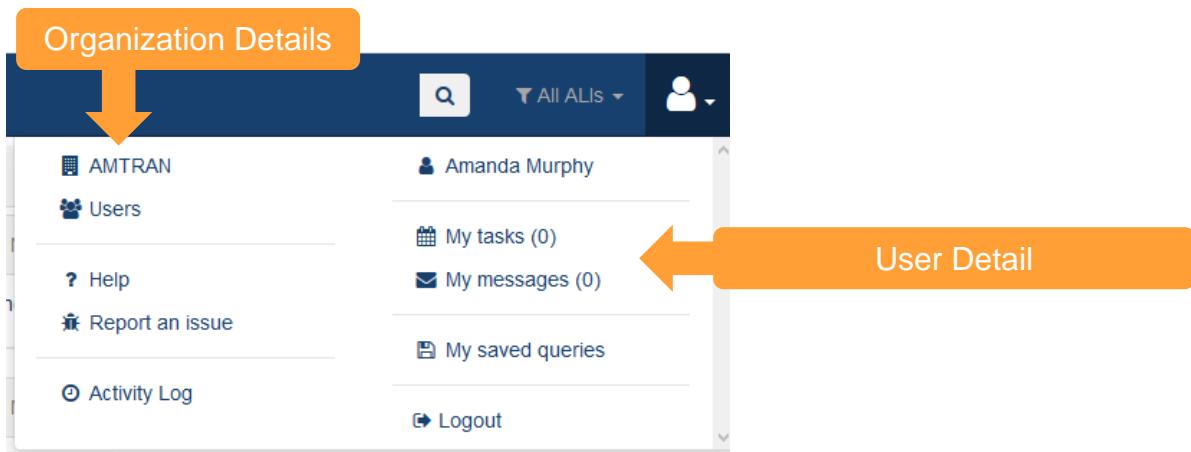
Figure 18 Search Box

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

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes links for Home, Organizations, Transit Operators, and AMTRAN. Below the navigation is a toolbar with icons for Home, Bus, Line Graph, Dollar Sign, Bar Graph, and a red notification badge. The main content area shows the 'AMTRAN' organization details. It includes fields for Type (Altoona Metro Transit), Name (Altoona Metro Transit), Short Name (Not Set), External ID (Not Set), Address (3301 Fifth Avenue, Altoona, PA, 16601), and Technical Contact (Subrecipient Number: XXXXXXXXX). A dropdown menu is open over the 'Actions' button, showing options: 'Update this organization' (with a checked checkbox) and 'Add a user' (with a person icon). To the right of this is a pie chart showing asset distribution by type: Bus Std 35 FT (28%), Bus < 30 FT (17.8%), Other Support Facility (11.7%), Intermodal Terminal (9.8%), Bus 30 FT (8.8%), and Bus Maintenance Facility (8.8%). Below the pie chart is a table titled 'Organization Details' showing asset types and counts:

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

An orange arrow points from the 'Edit Organization Details or Add Users' callout to the 'Actions' dropdown, and another orange arrow points from the 'Organization Details' callout to the table.

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

The screenshot shows the 'My Profile' section of the Capital Planning Tool (QA). At the top, there's a navigation bar with icons for Home, Bus, Graph, Dollar Sign, and a globe with a red notification badge (1). Below the navigation is a breadcrumb trail: Home > Users > My Profile. The main area displays a user profile for Amanda Murphy, including her name, a placeholder profile picture, and a list of contact information: Email (amandamurphy@amtran.org), Primary Phone (999-9999), Address (PA), Role (Agency Manager), and Privileges. To the right of the profile, there are organization details: Organization (AMTRAN), Address (3301 Fifth Avenue, Altoona, PA, 16601-1801), and Phone (999 999-9999). A large orange arrow points from the text 'Edit Profile Details' to the 'Actions' dropdown menu, which is open and lists options: Assign myself a task, Update my profile picture, Update my settings, Update my profile, and Change my password.

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

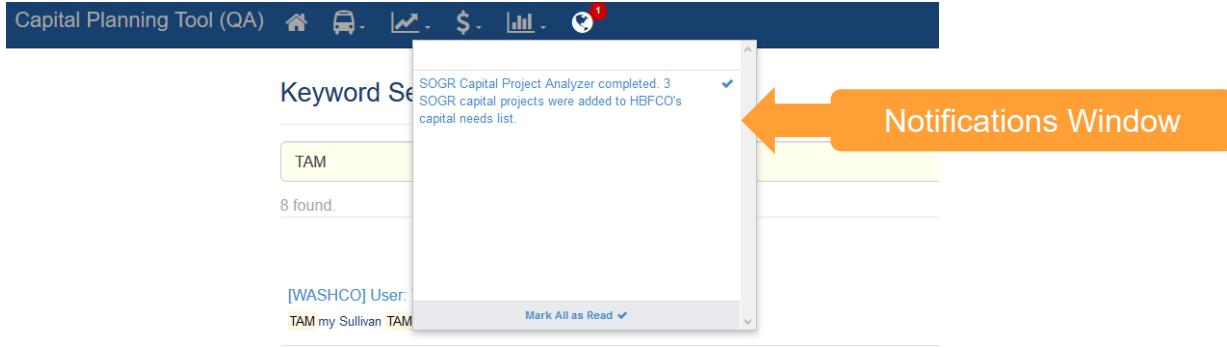
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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"/> <small>Please provide as much detail as you can...</small> | |
| <input type="button" value="Create Issue"/> | |

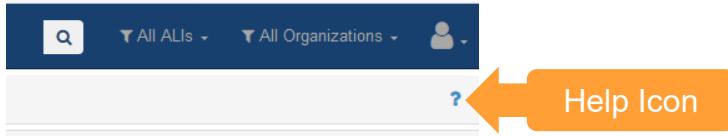
3.8 Notifications

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

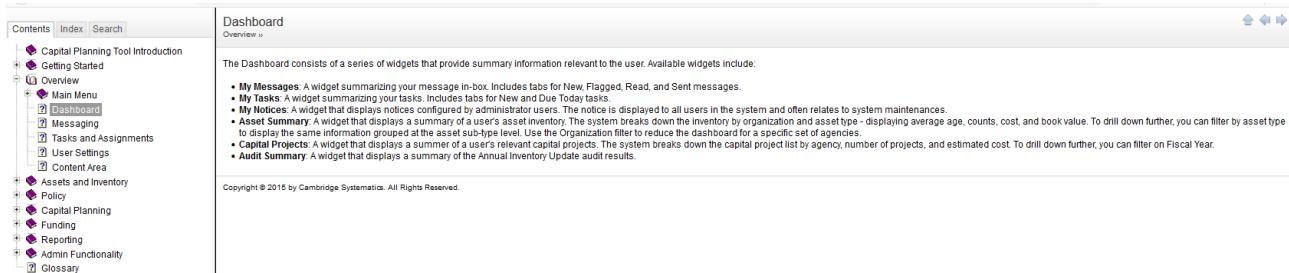
Figure 24 Notification Drawer

3.9 Help

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

Figure 25 Help Icon

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

Figure 26 Help Content

4.0 Asset Inventory

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

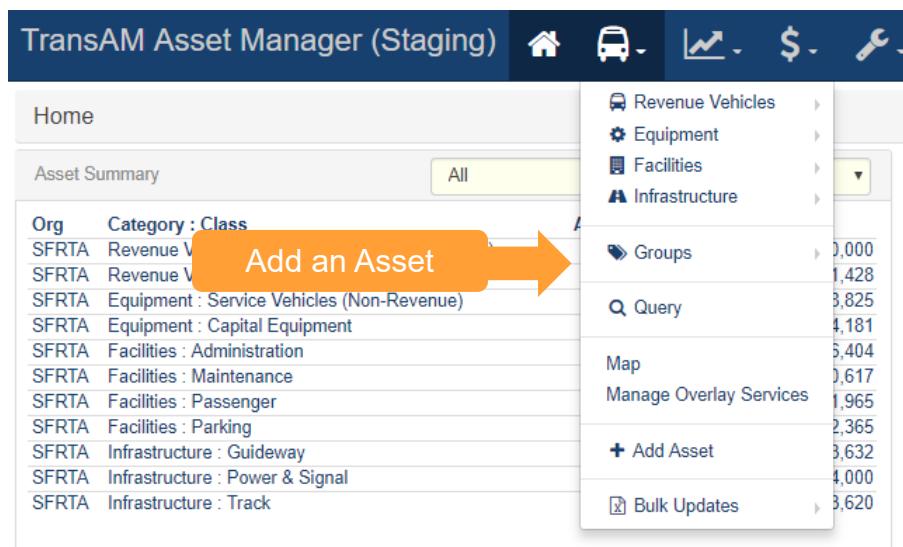
Figure 27 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 28 Adding an Asset



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

Figure 29 Select the Organization and Asset Class

Capital Planning Tool (QA) Home Add Asset \$ Graph List 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 30 Adding Asset Required Details

Capital Planning Tool (QA) Home Add Asset \$ Graph List Report Help ? All ALIs All Organizations User Profile

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 31 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' (Cost (Purchase), Funding Type, Direct Capital Responsibility), 'Procurement & Purchase' (Purchased New, Purchase Date), and a prominent 'Add Asset & Go to New Record' button. On the right, there are sections for 'Seating Capacity (ambulatory)', 'Standing Capacity', 'ADA Accessible' (radio buttons for Yes or No), 'Operations' (In Service Date, Primary Mode, Service Type (Primary Mode)), and 'Dedicated Asset' (radio buttons for Yes or No). The bottom of the screen includes copyright information (© 2013-2018 Cambridge Systematics) and build details (Build 2.3.2-qa1 Powered by TransAM Ver 2.3.10).

4.2 Accessing Existing Assets

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

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

Figure 32 Existing Assets

Capital Planning Tool (QA)

Home Asset Summary

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

My Tasks

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

Figure 33 Existing Asset Interface

Capital Planning Tool (QA)

Home > Revenue Vehicles > Buses (Rubber Tire Vehicles)

Revenue Vehicles

All Buses (Rubber Tire Vehicles)

| Asset ID | Organization | VIN | Manufacturer | Model | Year | Class | Type | Subtype | Status | ESL | Last Life Cycle Action | Life Cycle Action Date |
|--------------|--------------|-------------------|------------------------------|---------------|------|------------------------------|---------|---------------|----------------------------------|-----|---------------------------|------------------------|
| #1701 | CAT | 15GGB2713H3189913 | GIL - Gillig Corporation | 35' Low Floor | 2017 | Buses (Rubber Tire Vehicles) | Bus | Bus Std 35 FT | In Service | | Service status | 2/26/2018 |
| #271 | CAT | 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 | - | - | - |
| *001 | LCTA | 1FDFE4FS8GDC54953 | FRD - Ford Motor Corporation | Challenger | 2016 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT | In Service | | Mileage | 8/2/2018 |
| *002 | LCTA | 1FDFE4FSXGDC54953 | 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 | 15GGB2719F1185791 | GIL - Gillig Corporation | G27B103N4 | 2015 | Buses (Rubber Tire Vehicles) | Bus | Bus Std 35 FT | In Service | | Mileage | 3/23/2018 |
| 000001702-00 | PAAC | 15GGB2719F1185793 | GIL - Gillig Corporation | G27B103N4 | 2015 | Buses (Rubber Tire Vehicles) | Bus | Bus Std 35 FT | In Service | | Mileage | 3/23/2018 |

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

Figure 34 Asset Record: Highlights

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there are navigation icons for Home, Revenue Vehicles, Buses (Rubber Tire Vehicles), and Buses (Rubber Tire Vehicles) Profile. The main title is "Revenue Vehicle Profile" with the identifier "CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017". Below this, a "Highlights" section is shown with tabs for History, Tasks, Comments, Documents, Photos, Charts, Asset Values, Capital Projects, and Audit Results. A table titled "Event" lists two entries:

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

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

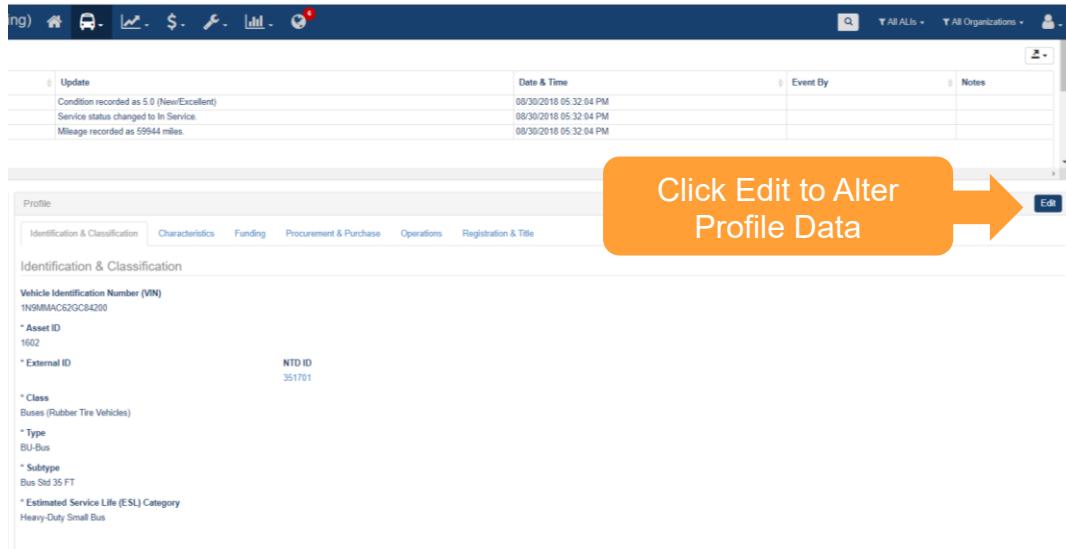
Figure 35 Asset Record: Profile and Summary

The screenshot shows the Asset Record: Profile and Summary page. On the left, there is a sidebar with sections for Asset Summary, Profile, and a table of asset details. The Profile section is expanded, showing:

- Identification & Classification:**
 - Vehicle Identification Number (VIN): 15GGB2713H3189913
 - * Asset ID: #1701
 - External ID: [#1701](#)
 - * Class: [Buses \(Rubber Tire Vehicles\)](#)
 - * Type: [BU-Bus](#)
 - * Subtype: [Bus Std 35 FT](#)
 - * Estimated Service Life (ESL) Category: [Heavy-Duty Large Bus](#)
- Funding:**
 - Replacement By Policy: FY 29-30
 - Scheduled Year: FY 29-30
 - Scheduled Cost: \$472,935
 - Replacement Cost: \$472,935
 - Policy Year: FY 29-30
- Useful Life:**
 - Useful Life Benchmark
 - Useful Life Remaining

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.

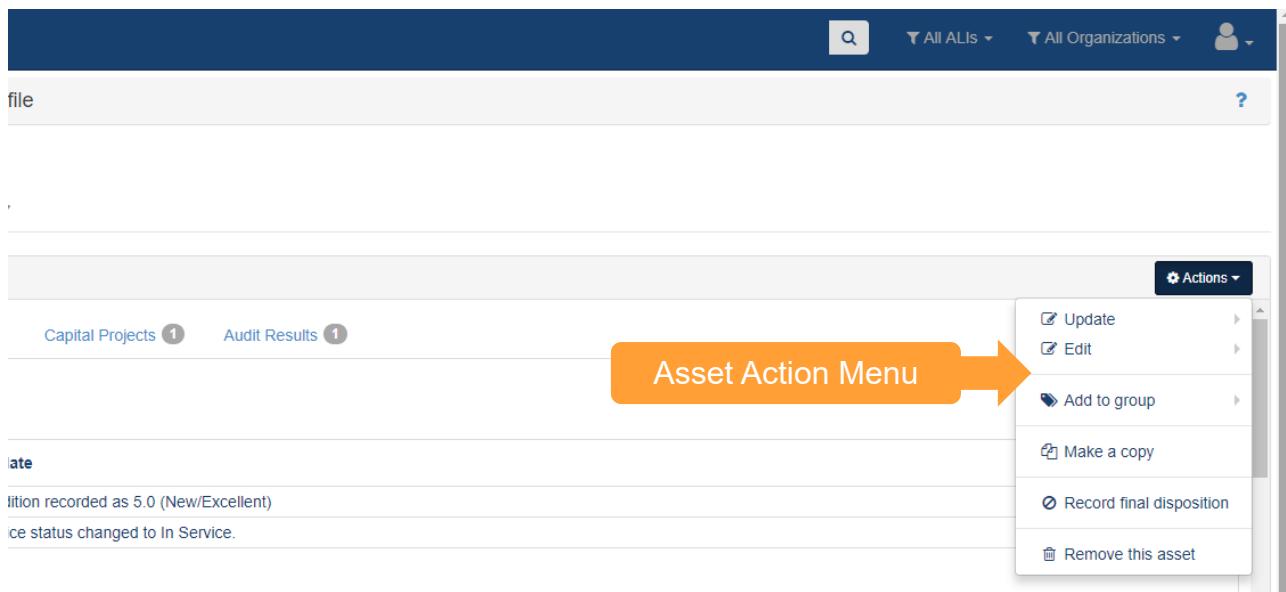
Figure 36 Editing the Profile of an Existing Asset

4.4 Updating Existing Asset Lifecycle Data

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

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

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

Figure 37 Updating the Lifecycle of an Existing Asset

4.5 Action Events (Disposition and Transfer Review)

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

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

Figure 38 Asset Action Events (Disposition and Transfer)

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The main area displays a table of assets with columns for Type, Avg. Age, and various metrics. A modal window titled 'Action Events' is open, showing two options: 'Early Disposition Proposed' and 'Newly Transferred Assets'. An orange arrow points from the text 'Action Events Menu' to this modal. To the right of the table is a 'Capital Projects' section with a table showing Agency, Num. Projects, and Cost. Below that is a 'My Notices' section with a message 'No notices.' At the bottom, there's a 'My Tasks' section with a 'Due today' button and a 'New' button. On the far right, there's an 'Audit Summary' section with a chart titled 'Annual Inventory Update Results' showing completion percentages for different asset types across various 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 39 Early Disposition Requests

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

4.6 Adding or Updating Assets by Bulk Update

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

Figure 40 Bulk Updates

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Charts, Money, and a globe. Below the navigation bar is a sidebar titled "Home" which includes "Asset Summary". The main content area displays a table of asset data with columns for Type, Avg. Age, and various financial metrics. On the right side, there is a vertical sidebar titled "Capital Projects" with a list of agencies. A callout box labeled "Bulk Updates" points to the "Bulk Updates" option in the sidebar, which is highlighted with an orange arrow.

| 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 |

| Agency |
|--------|
| ACTS |
| AMTRAN |
| ATA |
| BARTA |
| BCT |
| BCTA |
| BMC |
| BSS |
| BTA |
| CAT |
| CATA* |
| CCTA |
| CHESSR |
| CLARCO |

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

Figure 41 Bulk Update Tools

The screenshot shows the Bulk Update Tools page. At the top, there is a navigation bar with icons for Home, Bus, Charts, Money, and a globe. Below the navigation bar is a breadcrumb trail: Home > Bulk Updates. The main content area has three buttons: "Create a new Template" (highlighted with an orange arrow), "Upload a Template", and "Filter Status". Below these buttons is a table with columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The table contains three rows of data. A callout box labeled "Bulk Update Tools" points to the "Create a new Template" button.

| 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 42 Bulk Update Details

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

Home > Bulk Updates > Download Template

Bulk Update Templates

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

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

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

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

Select Template and Asset Type

Template Type: Inventory Updates

Fta Asset Class: Select fta asset class...

Organization: Organization dropdown menu

Create template button

Choose these parameters

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

Figure 43 Bulk Update Spreadsheet Download

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

Home > Bulk Updates > Download Template

Success

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

Download File

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

Figure 44 Bulk Update Spreadsheet

| Asset | 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 | A2E18C29FDGK6 | ATA | 704 | | Buses (Rubber Tire Vehicles) | Bus | 30 FT | Heavy-Duty Large Bus | NFA D30LF | SFYD2TN07DXYU020685 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 5 | A2E18C3G088A | ATA | 705 | | Buses (Rubber Tire Vehicles) | Bus | 30 FT | Heavy-Duty Large Bus | NFA D30LF | SFYD2TN01YYU020686 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 6 | A2E18C474G4 | ATA | 706 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE291951090105 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 7 | A2E18C474MF4E | ATA | 707 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE291951090106 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 8 | A2E18C56SG82 | 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 | A2E18C695LBRB | ATA | 710 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE291651090109 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 11 | A2E18C79LH24 | ATA | 711 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE291251090110 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 12 | A2E18C800038 | ATA | 712 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271981091596 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 13 | A2E18C817GK3 | 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 | A2E18C935EM9 | 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 | A2E18CB09HDPC | 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 | A2E18C9EB5MK0M | 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 | A2E18C94CN614 | 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 | A2E18C9GL0KL2 | 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 | A2E18C9DB97DK | 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 | A2E18CE07EKK | 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 | A2E18GEF3ECK | ATA | 723 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271491091655 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 24 | A2E18GF54C00 | ATA | 724 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271691091656 | 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 | A2E18GG6KQ40 | 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 | A2E18GHAB0 | ATA | 728 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271891091660 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 29 | A2E18GHKA070 | ATA | 729 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271X91091661 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 30 | A2E18GA178K | ATA | 730 | | Buses (Rubber Tire Vehicles) | Bus | < 30 FT | Heavy-Duty Large Bus | GIL Gilig 29LF | IGGE271191091662 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 31 | A2E18GIN06GM | ATA | 750 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | IGCB29165111645 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 32 | A2E18GUFCFK1 | ATA | 751 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | IGCB29185111646 | 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 | IGCB291X5111647 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 34 | A2E18GL4K4 | ATA | 753 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | IGCB29151111648 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 35 | A2E18GL48C44 | ATA | 754 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Gilig 35' | IGGB271291079888 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 36 | A2E18GLUHAE | ATA | 755 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Gilig 35' | IGGB271191079889 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 37 | A2E18GMNPW4 | ATA | 756 | | Buses (Rubber Tire Vehicles) | Bus | Std 35 FT | Heavy-Duty Large Bus | GIL Gilig 35' | IGGR271191078187 | In Service | 01/23/2018 | | | 2.00 | 01 |

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

Figure 45 Bulk Update Upload

The screenshot shows the 'New Template' section of the Bulk Updates page. It includes fields for 'Spreadsheet Content' (set to 'Inventory Updates') and 'Organization' (set to 'CATA*-Centre Area Transportation Authority'). A large orange callout box with an upward arrow points to the 'Upload spreadsheet' button, which is highlighted in blue. The callout box contains the text: 'Select the parameters again and upload spreadsheet'.

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

Figure 46 Bulk Upload Processing

The screenshot shows the main Bulk Updates page after a file has been uploaded successfully. A green banner at the top displays the message 'File was successfully uploaded.' Below this, a table lists the uploaded files with their details:

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

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

Figure 47 Bulk Update Edit

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.

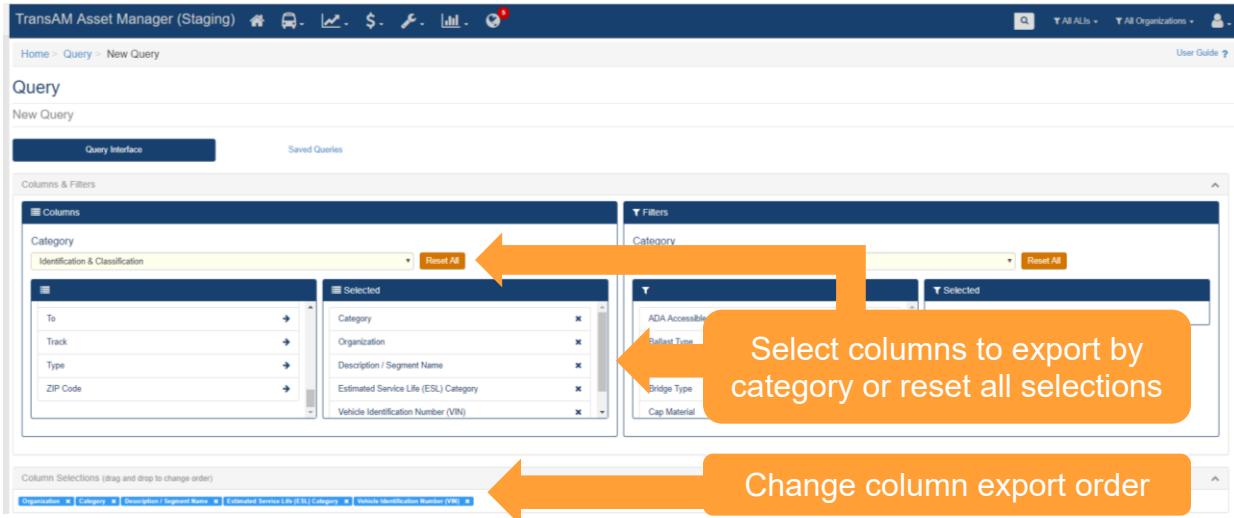
Figure 48 Asset Query

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

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

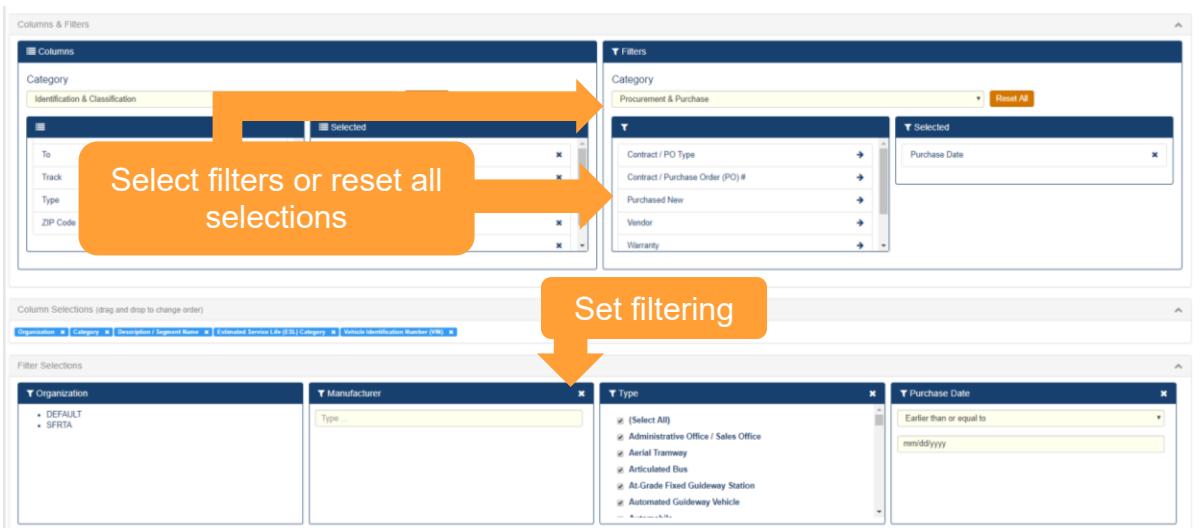
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

Figure 49 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.

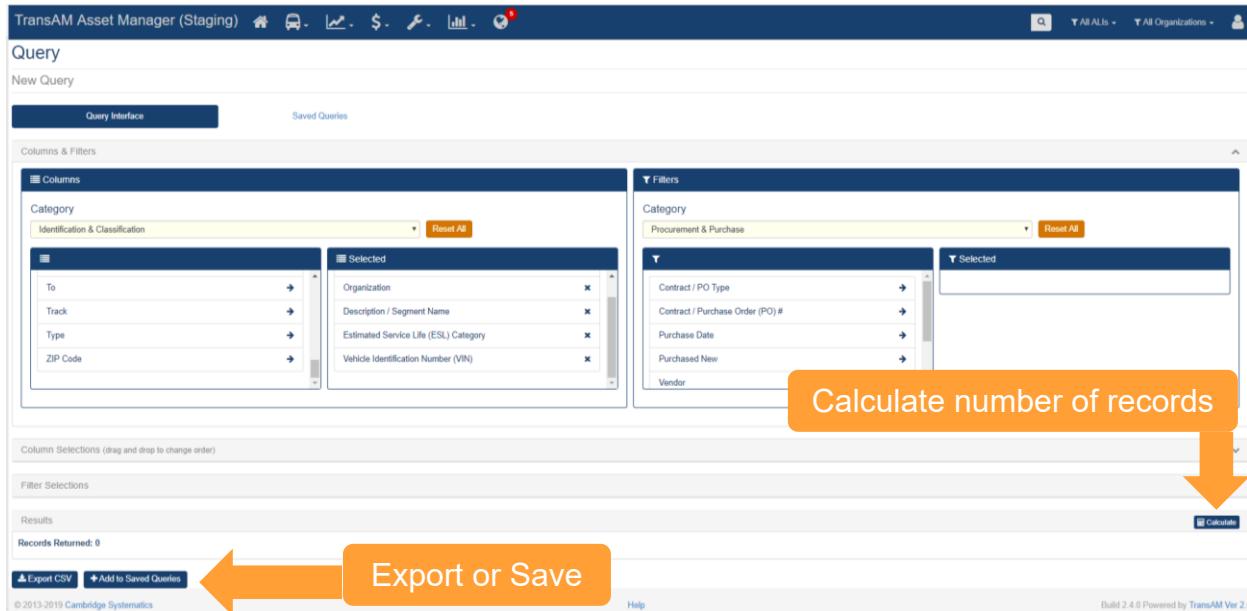
Figure 50 Filter Selection



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 51 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 52 Saved Queries

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

4.8 Map

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

Figure 53 Asset Map

Capital Planning Tool (QA)

Home

Asset Summary

| 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 |

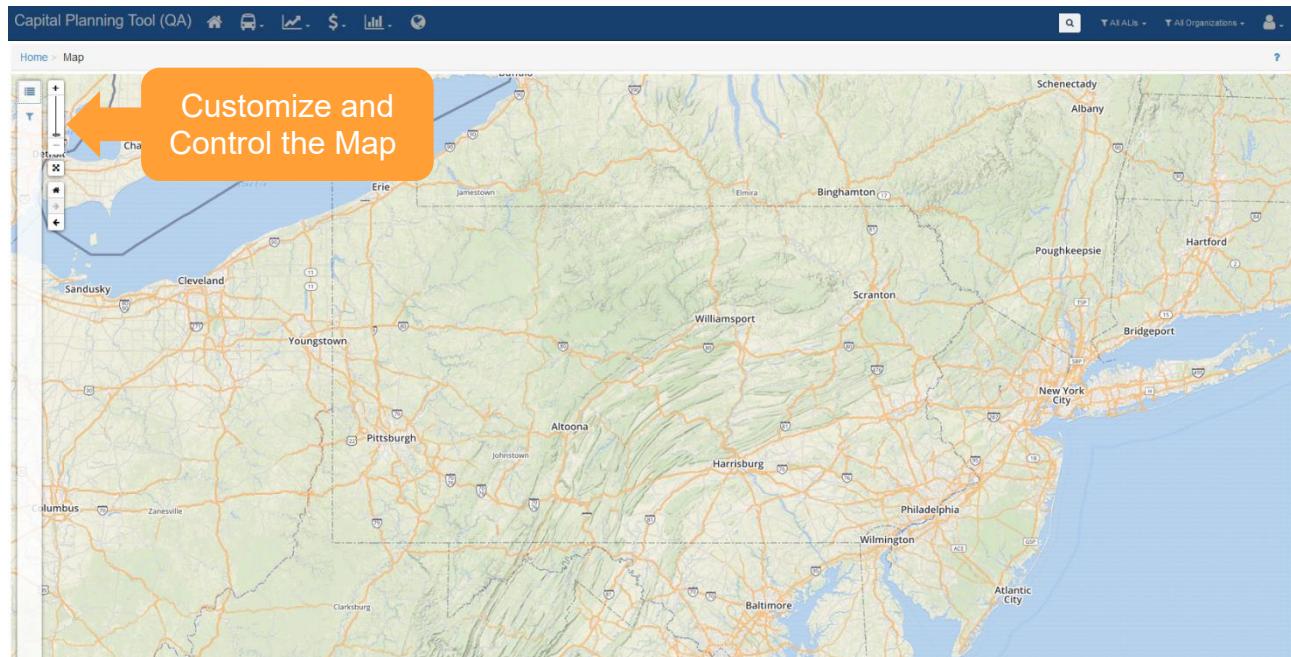
Revenue Vehicles
Equipment
Facilities
Infrastructure
Groups
Action Events
Map
Manage Overlay Services
+ Add Asset
Bulk Updates

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

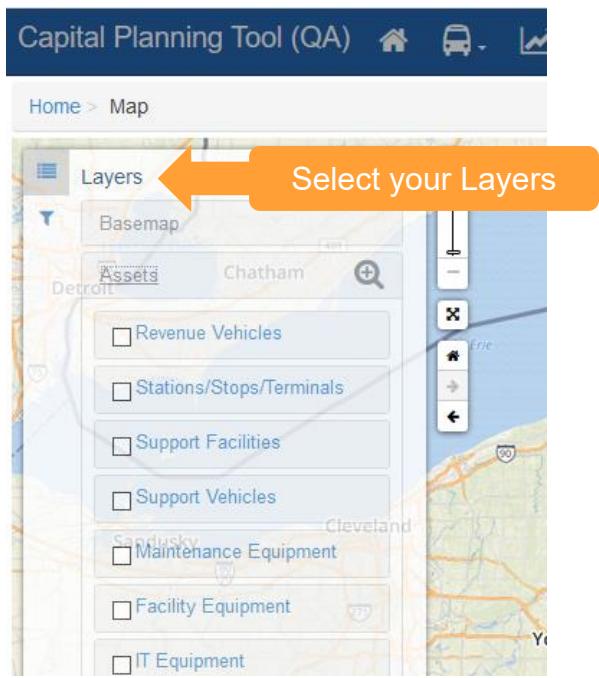
Map your Assets

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

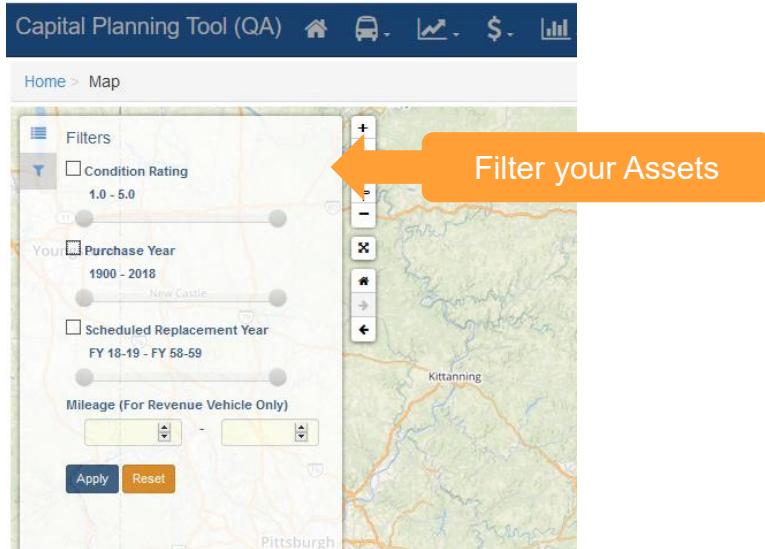
Figure 54 Map Customization



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.

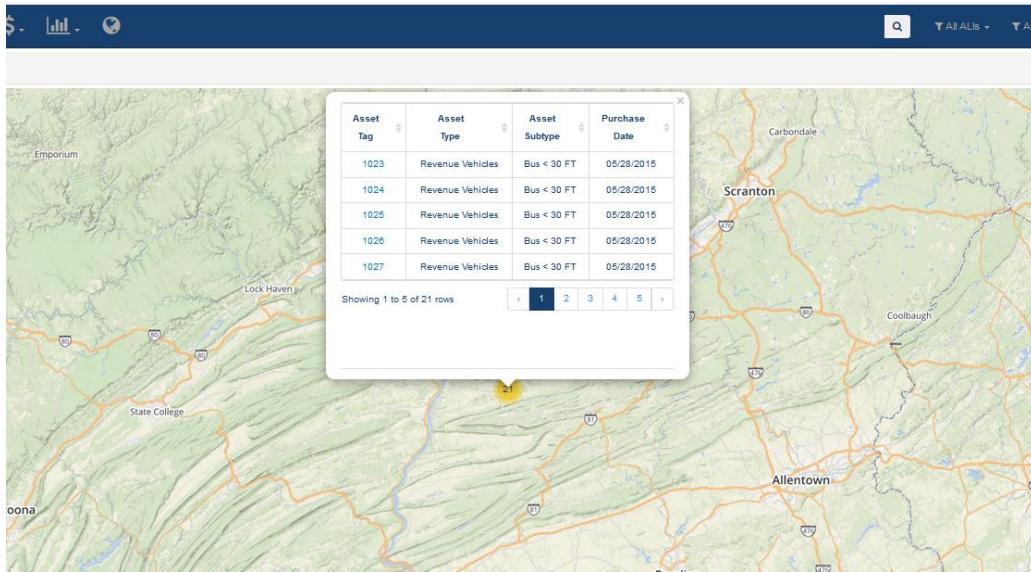
Figure 55 Map Layers

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

Figure 56 Map Filter

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

Figure 57 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 58 Asset Groups

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a table of asset types and their average age. In the center, there's a navigation bar with icons for Home, Asset Summary, and various asset types like Revenue Vehicles, Equipment, Facilities, and Infrastructure. Below the navigation bar, there's a dropdown menu with the following options:

- Groups
- Action Events
- Map
- Manage Overlay Services
- + Add Asset
- Bulk Updates
- IT Equipment
- Office Equipment
- Communications Equipment
- Signals/Signs
- Guideway
- Power & Signal
- Track

On the right, there's a list of agencies with an orange arrow pointing to the 'Groups' option in the dropdown menu.

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

Figure 59 Adding an Asset to a Group

The screenshot shows the Capital Planning Tool (QA) interface for a Revenue Vehicle Profile. The URL is <https://bpt-qa.camsys-apps.com/inventory/A2E1DU86688#>. The page title is "Revenue Vehicle Profile" for asset "CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017". The "Actions" dropdown menu is open, with "Add to group" highlighted. An orange arrow points from the text "Add an Asset to a Group" to this menu item.

Highlights

- History
- Tasks
- Comments
- Documents
- Photos
- Charts
- Asset Values
- Capital Projects
- Audit Results

Add an Asset to a Group

Event

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

Profile

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

Identification & Classification

Vehicle Identification Number (VIN)
15GGB2713H3189913

*** Asset ID**
#1701

External ID
NTD ID

Age 0 yrs
Mileage

5.0 Maintenance

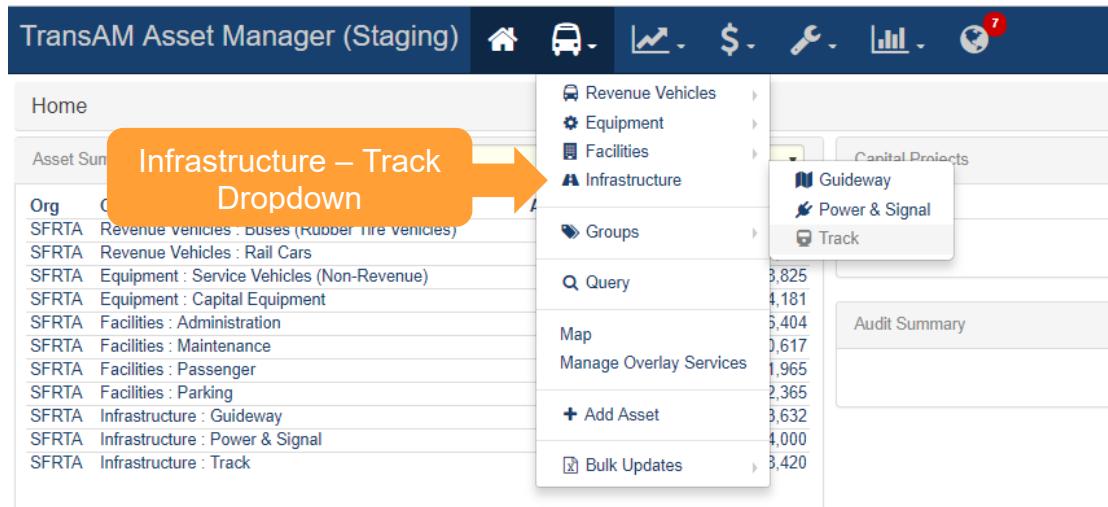
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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 60 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.

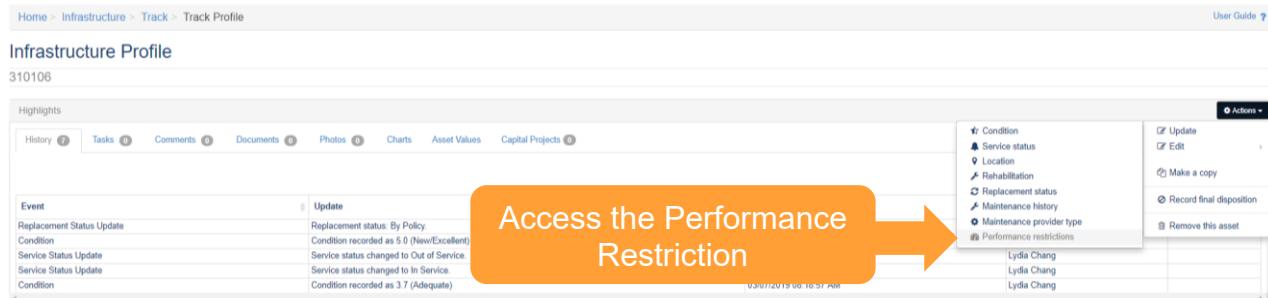
Figure 61 Existing Asset Interface : Infrastructure - Track

The screenshot shows the Existing Asset Interface for Infrastructure - Track. At the top, there's a header with 'All Track'. Below it is a table with columns: Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. An orange arrow points from the text 'Access the Infrastructure – Track Record' to the 'Asset ID' column of the first row. The table contains 10 rows of data, with page navigation at the bottom showing pages 1 through 28.

| 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 | 3/12/2019 | In Service |
| 310106 | SFRTA | | | | | | | | South Florida Rail Corridor | N/A | 2 | Main Line | - | Replacement status | 3/12/2019 | 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 62 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 63 Performance Restriction Lifecycle Event

| Line | From | Line | To | Unit |
|------|-------|------|-------|------|
| SX | 971.9 | SX | 975.3 | mile |

Associated Linear Asset Records

310107 310108 310109 310110

Restriction Cause:

Date of Performance Restriction: 03/14/2019 07:13:32 PM

Comments: Enter any additional comments...

Submit the Performance Restriction

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

Figure 64 Maintenance Dropdown

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

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

Figure 65 Performance Restriction Management

The screenshot shows a table titled "Performance Restrictions" with the subtitle "Active Restrictions". The table has a header row with columns for Status, Active Start, Active End, and other details. The main body of the table contains rows of restriction data. Each row includes columns for Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Unit, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. A "Closeout" button is visible in the Status column for some rows. At the bottom of the table, it says "Showing 1 to 7 of 7 rows".

| Status | Active Start | Active End | Asset / Segment ID | Org | Desc / Segment Name | Subtype | Line | From | Line | To | Track | Max Permissible Speed | Unit | Speed Restriction | Unit | Restriction Cause | Active Start | Active End | Submitted By | Status | Comments |
|--------|---------------------|---------------|--------------------|-------|---------------------|--------------------|------|----------|------|----------|--------|-----------------------|------|-------------------|------|-------------------|---------------------|---------------|--------------|--------|---------------------------|
| Active | 07/05/2017 12:00 AM | Until Removed | 311107 | SFRTA | N/A | Tangent (Straight) | SX | 1,024.00 | SX | 1,024.60 | 2 | 79 | mph | 25 | mph | Other | 07/05/2017 12:00 AM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/06/2019 09:52 AM | Until Removed | 310104 | SFRTA | N/A | Tangent (Straight) | SX | 970.20 | SX | 970.40 | 2 | 30 | mph | 20 | mph | Rail Defect | 03/06/2019 09:52 AM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/12/2019 10:26 AM | Until Removed | 311107 | SFRTA | N/A | Tangent (Straight) | SX | 1,023.40 | SX | 1,028.30 | 2 | 79 | mph | 25 | mph | Maintenance | 03/12/2019 10:26 AM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/19/2019 11:19 AM | Until Removed | 311107 | SFRTA | N/A | Tangent (Straight) | SX | 1,023.40 | SX | 1,028.30 | 2 | 79 | mph | 25 | mph | Maintenance | 03/19/2019 11:19 AM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/13/2019 02:18 PM | Until Removed | Multiple | SFRTA | Multiple | Multiple | SX | 991.08 | SX | 992.00 | Single | Multiple | mph | 28 | mph | Rail Defect | 03/13/2019 02:18 PM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/19/2019 02:19 PM | Until Removed | Multiple | SFRTA | Multiple | Multiple | SX | 964.10 | SX | 965.00 | Single | Multiple | mph | 25 | mph | Rail Defect | 03/19/2019 02:19 PM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |
| Active | 03/13/2019 02:22 PM | Until Removed | Multiple | SFRTA | Multiple | Multiple | SX | 969.10 | SX | 970.00 | Single | Multiple | mph | 25 | mph | Rail Defect | 03/13/2019 02:22 PM | Until Removed | Lydia Chang | Active | <button>Closeout</button> |

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 66 Policies Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, and various reports. Below the navigation bar is a table titled "Asset Summary" showing data for different asset types like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc. To the right of the table is a "Policies" dropdown menu. An orange arrow points from the text "Policies Dropdown" to the "Policies" option in the menu. The dropdown menu also includes links for "Capital Projects", "Project Planner", and "SOGR Capital Project Analyzer". Below the dropdown is a table titled "Capital Projects" with columns for Agency, Num. Projects, and Cost. The table lists various organizations and their 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 67 Policy Rule Sets

The screenshot shows the Capital Planning Tool (QA) interface with the "Policies" page selected. On the left, there is a link to "Asset Replacement/Rehabilitation ...". On the right, there is a link to "TAM Policy". An orange arrow points from the text "Policy Rule Sets" to the "TAM Policy" link. Both links are accompanied by small icon boxes.

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 68 Asset Replacement/Rehabilitation Policy

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. Below this is a table titled 'Asset Summary' showing data for various asset types like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc. To the right, a sidebar lists organizations: BARTA, BCT, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CARS, and CAT. A dropdown menu at the top right shows 'FY 18-19'. An orange callout bubble points to the 'Asset Replacement/Rehabilitation Selection' section.

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 69 Asset Replacement/Rehabilitation Policy Filters

This screenshot shows the 'Asset Replacement/Rehabilitation Policy' filters page. It includes a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. The main area displays policy details for 'BPT-PennDOT Bureau of Public Transportation' under 'FY 2017 Statewide Transit Policy (Current)'. The 'Filters' section contains dropdowns for 'Organization' (set to 'BPT-PennDOT Bureau of Public Transportation') and 'Policy Year' (set to 'FY 2017 Statewide Transit Policy'). Arrows point from labels 'Organization Filter' and 'Policy Year' to these dropdowns. Other visible sections include 'Policy Rules' (with a link to 'Actions'), 'Condition Threshold' (2.50), 'Depreciation Calculation Type' (Straight Line), and 'Depreciation Interval' (Annually). A table at the bottom lists various asset categories with their respective settings.

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 70 Policy Rules

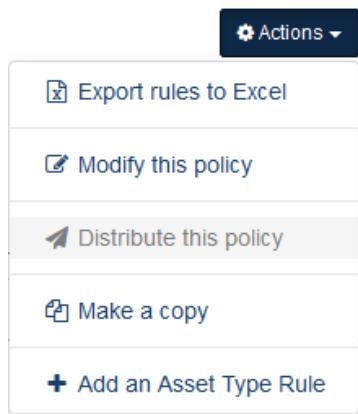
The screenshot shows the 'Policy Rules' page with the following details:

- 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 points from the text "The Actions button will display a list of options as shown." to the "Actions" button at the top right of the page.

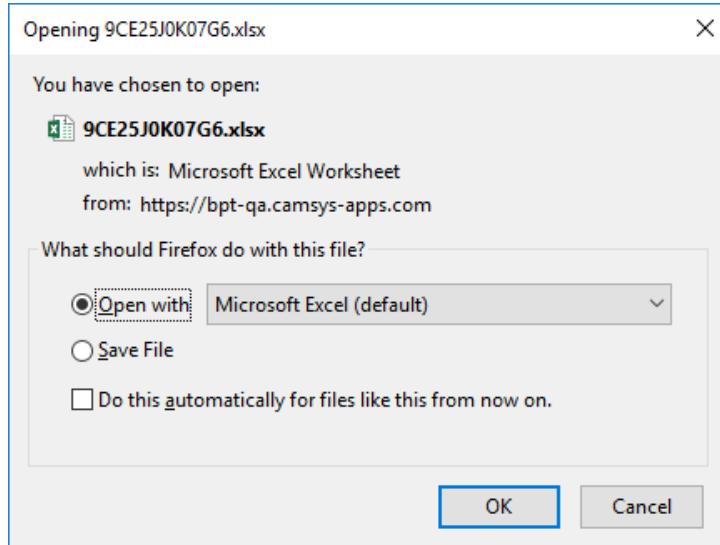
The Actions button will display a list of options as shown.

Figure 71 Policy Rules Actions Dropdown



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

Figure 72 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 73 Modify (Update) Organization Policy Dialog

Update Policy

The screenshot shows the 'Update Policy' dialog box. It contains the following fields:

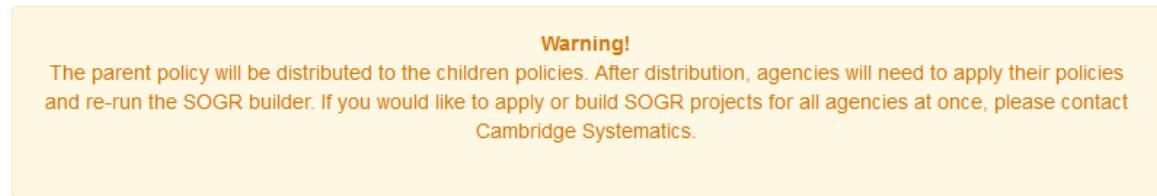
- Description:** FY 2017 Statewide Transit Policy
- Condition Threshold:** 2.5
- Depreciation Calculator:** Straight Line
- Depreciation Interval:** Annually

At the bottom is a blue 'Update Policy' button.

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

Figure 74 Distribute Policy

Distribute Policy



Run...

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

Figure 75 Copy Organization Policy Dialog

Update Policy

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

* **Condition Threshold**
2.5

* **Depreciation Calculator**
Straight Line

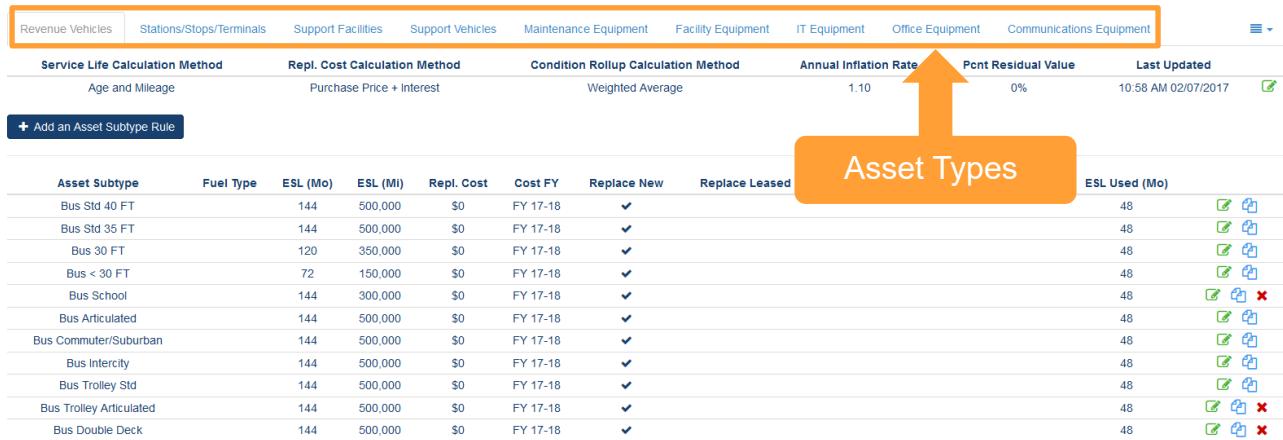
* **Depreciation Interval**
Annually

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 76 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 77 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 78 Asset Type Rules

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

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

Figure 79 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

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

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

Figure 80 Edit Icon



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

Figure 81 Modify Asset Policy Rule**Modify Rule: IT Equipment**

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

 * Annual Inflation Rate * Pcnt 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 82 Asset Type and Asset Subtype rules

Revenue Vehicles Stations/Stops/Terminals Support Facilities Support Vehicles Maintenance Equipment Facility Equipment IT Equipment Office Equip

Asset Subtype Rules

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

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

Figure 83 Add an Asset Subtype Rule Icon

+ Add an Asset Subtype Rule

Select or fill out each text box in the Add an Asset Subtype dialog box to create a new rule. Click the “Save” button when you are satisfied with your entries.

Figure 84 Add an Asset Subtype Rule Dialog

Add an Asset Subtype Rule

Replacement

Asset Subtype
New Subtype

New Asset Subtype Name

New Asset Subtype Description

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

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

Replace Asset Subtype Replace Fuel Type

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

* Engineering Design Code * Rehabilitation Code

Save **Cancel**

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

Figure 85 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade

Replacement

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

* ESL Used (Mo) Lease Length Months
0 0

* Purchase Replacement Code * Lease Replacement Code
12.22.06 12.26.06

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

Save **Cancel**

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

Figure 86 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 87 TAM Policy Dropdown Menu Selection

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

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

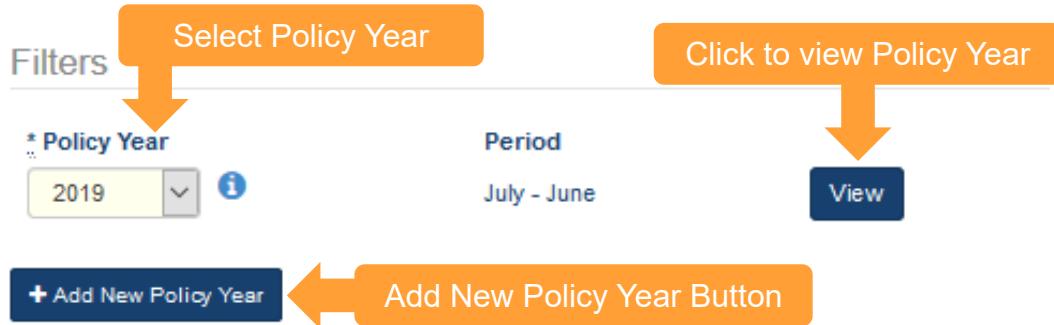
Figure 88 TAM Policy Group Management

The screenshot shows the "Group Management" tab selected under the "TAM Policy" section. The page includes a "Policy Year" dropdown set to "2019", a "Period" dropdown set to "July - June", and a "View" button. An orange callout bubble points to the "Group Management" tab, with the text "Group Management tab" inside it. The URL in the browser address bar is "Home > Policies > TAM Policy > Group Management".

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

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

Figure 89 TAM Policy Year



If you select the “Add New Policy Year” button, a dialog box will appear and the year selection will default to the next available year. If there are no existing Policy Years, the current year will be available. If there is an existing Policy Year, you will have the option to Copy Groups From Previous Policy Year.

Figure 90 Add New TAM Policy Year

The dialog box is titled 'TAM Policy' and has a close button 'X'. It contains a header 'Add New Policy Year'. Below the header are two fields: '* Policy Year' (set to '2022') and 'Period' (set to 'July - June'). A note 'Copying groups from the previous year, will save you the effort of recreating groups and performance measures' is displayed in a callout box. At the bottom are 'Save' and 'Cancel' buttons.

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

Figure 91 Group Management Period and Year

Group Management : 2019 : July - June



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

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

Figure 92 Add Group Button

In order to create a new TAM Policy Group, you will name the group in Name and select the user that will be the TAM Group Lead. Next, select the applicable organizations to associate with the new TAM Group.

Figure 93 Add TAM Group Dialog

TAM Group

Add Group

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

Not Selected

Search...

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

Selected

*** Asset Categories**

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

**Figure 94 Add TAM Group Dialog
With Selections**

The screenshot shows the 'Add TAM Group' dialog. At the top, there are fields for 'Name' (My New Group) and 'TAM Group Lead' (Elizabeth Bonini). Below these are two lists: 'Not Selected' and 'Selected'. The 'Not Selected' list contains a search bar and a scrollable list of organizations. The 'Selected' list is currently empty. An orange callout bubble with the text 'Click the arrows to add or remove organizations' points to the right-pointing arrow between the two lists. At the bottom, there are buttons for 'Asset Categories', 'Save', and 'Cancel'.

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

**Figure 95 Add TAM Group
Selections, Asset Categories**

The screenshot shows the 'Add TAM Group' dialog. At the top, there are fields for 'Name' (My New Group) and 'TAM Group Lead' (Elizabeth Bonini). Below these are two lists: 'Not Selected' and 'Selected'. The 'Not Selected' list contains a search bar and a scrollable list of organizations. The 'Selected' list contains three organizations: BCT-Bucks County Transport, Inc., BTA-Butler Transit Authority, and CAT-Cumberland-Dauphin-Harrisburg Transit Authority. At the bottom, there is a section for 'Asset Categories' with checkboxes for 'Revenue Vehicles' (checked), 'Equipment' (unchecked), and 'Facilities' (checked). An orange callout bubble with the text 'Asset Categories' points to the checkbox section. There are also 'Choose All' and 'Clear All' buttons at the bottom, along with 'Save' and 'Cancel' buttons.

Once the new group is created, the Status is set to Inactive. You have the option to edit, delete or Generate that Group. Click “Generate” when you are ready to proceed and you will notice that the group Status will

change to In Development. Clicking the “Generate” button adds the group to the Group Metrics tab, so the assigned TAM Group Lead can start the process of setting performance measures and editing rules for all organizations within the group. The Group Management tab, is only viewable and editable by users with the TAM Group Manager or Admin permission, and TAM Group Leads who can only access groups to which they have been assigned.

Figure 96 TAM Group Mangement Status

Group Management : 2022 : July - June

+ Add Group

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

Generate

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

Figure 97 TAM Policy Group Metrics

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

TAM Policy

Group Management Group Metrics Performance Measures

Filters

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

Select Policy Year, Group Name and click View

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

Figure 98 Editable and Locked Assets

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

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

Figure 99 Asset Type Percentage Settings

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

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

Figure 100 Distribute TAM Policy

TAM Policy

Group Management Group Metrics Performance Measures

Filters

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

Distribute

Group Metrics : 2018 : July - June : New Group

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

Revenue Vehicles

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

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

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

Figure 101 Distributed TAM Policy

Capital Planning Tool (QA) Home Bus Line \$ Bar Clock

TAM Policy

Group Management Group Metrics Performance Measures

Filters

* Policy Year: 2018 Period: July - June

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

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

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

Figure 102 TAM Policy Performance Measures

Capital Planning Tool (QA) 🔍 All ALIS ⚙️

Home > Policies > TAM Policy > Performance Measures ?

TAM Policy

Group Management Group Metrics Performance Measures Performance Measures

Filters

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

Performance Measures

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

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

Figure 103 Policy Year Filters

Filters

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

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

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

Figure 104 Asset Type Percentage Settings

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

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

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

Figure 105 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:

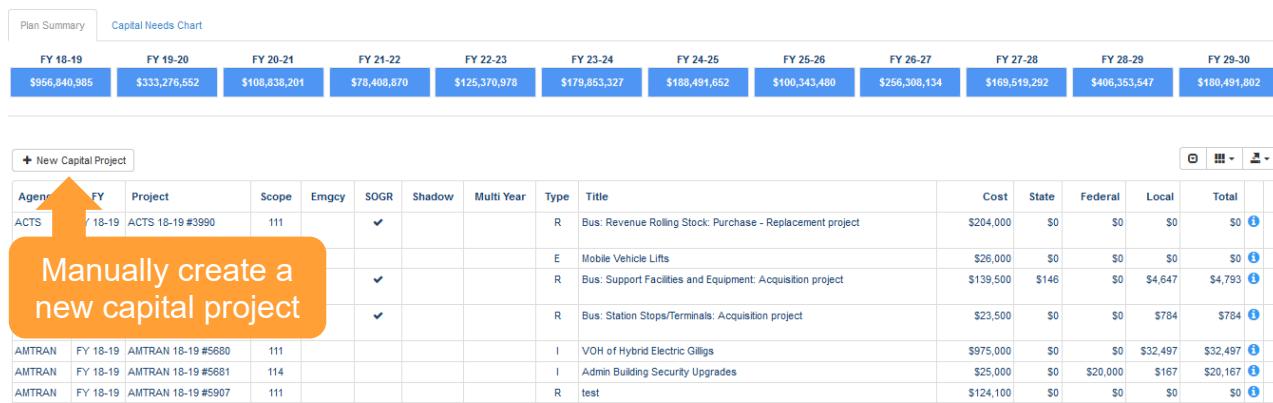
- Projects that use the Asset Replacement/Rehabilitation policy information to replace existing assets to keep assets in a state of good repair. These are known as State of Good Repair (SOGR) projects.
- Projects that acquire new assets that enable you to provide new or expanded services or accomplish 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 106 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 Gills | \$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 107 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 108 Capital Project Details

Capital Planning Tool (QA)

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 |
| <p>Project Number AMTRAN 18-19 #6087</p> <p>Fiscal Year FY 18-19</p> <p>Scope 125</p> <p>Total Cost \$0</p> <hr/> <p>Type Replace</p> <p>SOGR No</p> <p>Shadow No</p> <p>Multi year No</p> <p>Emergency No</p> | | | | | |
| <p>Project Description</p> <p>test</p> <p>Justification</p> | | | | | |
| <p>Project Locations Senate District 30 (Senate)</p> | | | | | |

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 109 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, tabs for Description, Activity Line Items (with a count of 0), Supporting Documents (0), and Comments (0) are visible. 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 110 Add an ALI Details

This screenshot shows the 'New Activity Line Item' dialog box for project 'AMTRAN 18-19 #6126'. The dialog contains several fields: 'Category' (dropdown), 'TEAM ALI Code' (dropdown), 'Cost Estimate' (\$ dropdown), 'Fiscal Year' (FY 18-19 dropdown), 'Replace with New' (radio buttons for Yes or No), 'Count' (dropdown), 'Fuel Type' (dropdown), 'Length' (dropdown), and 'Name' (text input). At the bottom are 'Create Activity Line Item' and 'Cancel' buttons. The background shows the same Capital Planning Tool interface as Figure 109, 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

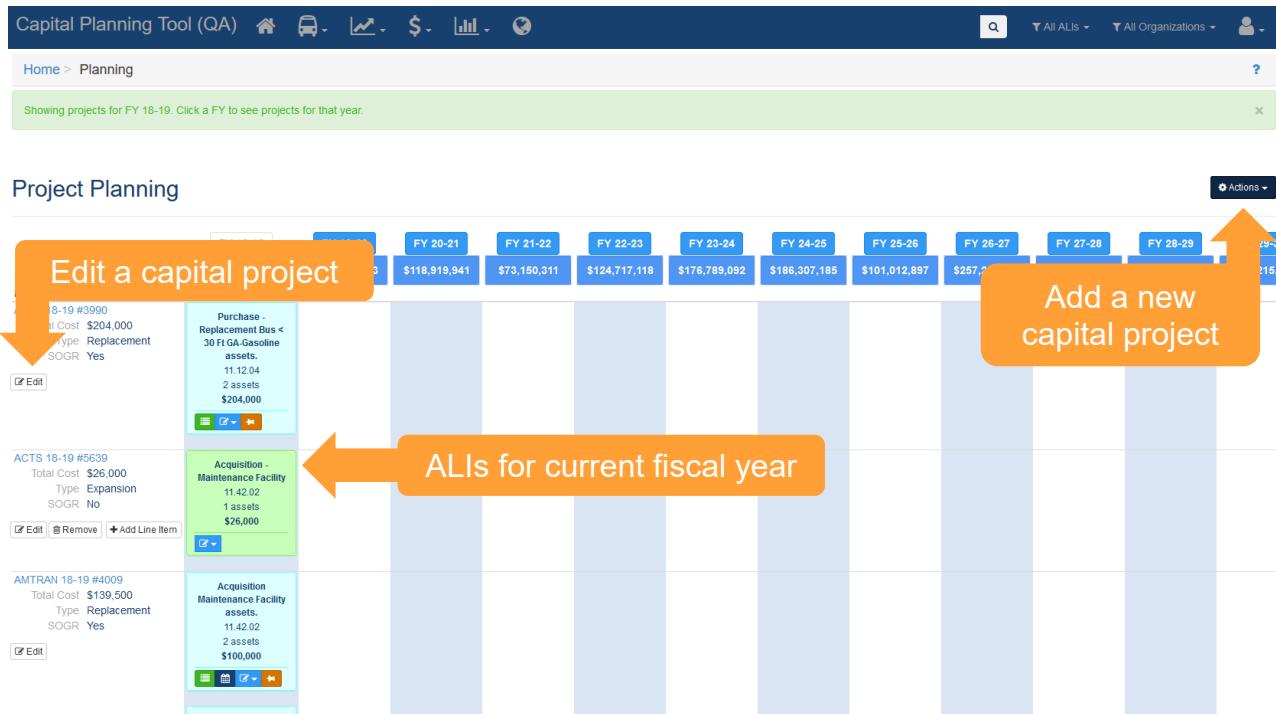
8.1 Project Planner

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 111 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 112 Edit Manually Created Capital Projects

The screenshot shows the TransAM Capital Planning Tool interface. At the top, there's a navigation bar with links for Home, Planning, and search functions. Below the navigation is a message: "Showing projects for FY 18-19. Click a FY to see projects for that year." The main area is titled "Project Planning". It features a grid where each row represents a project and each column represents a fiscal year from FY 18-19 to FY 29-30. The first project in the grid is "ACTS 18-19 #3990". A callout box with an orange arrow points to this project with the text "Remove a project or add an ALI". Another callout box with an orange arrow points to the second project in the grid, "AMTRAN 18-19 #4009", with the text "Edit ALI cost, milestones, view funding data, or remove an ALI". The grid also includes a header row for the fiscal years.

| | 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 | \$335,781,113 | \$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. 11.42.04 | | | | | | | | | | |
| AMTRAN 18-19 #4009 | Total Cost: \$139,500 Type: Replacement SOGR: Yes | Acquisition - Maintenance Facility 11.42.02 1 assets \$26,000 | | | | | | | | | | |
| | | Acquisition - Maintenance Facility 11.42.02 2 assets \$100,000 | | | | | | | | | | |

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 113 Edit SOGR Capital Projects

The screenshot shows the TransAM Project Planner interface with three capital projects listed:

- ACTS 18-19 #3990:** Total Cost \$204,000, Type Replacement, SOGR Yes. An orange arrow points up from the 'Edit' button to a callout box labeled "Edit SOGR project details".
- Maintenance Facility:** Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04 2 assets \$204,000
- AMTRAN 18-19 #4009:** Total Cost \$139,500, Type Replacement, SOGR Yes. An orange arrow points down from the 'Edit' button to a callout box labeled "Edit ALI assets, update cost, milestones, view funding data, remove an ALI and pin ALIs".
- AMTRAN 22-23 #4019:** Total Cost \$41,056, Type Replacement, SOGR Yes.

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 114 Prioritize Projects
Move ALIs to Different Years

The screenshot shows the Capital Planning Tool (QA) interface with several capital projects listed in a grid:

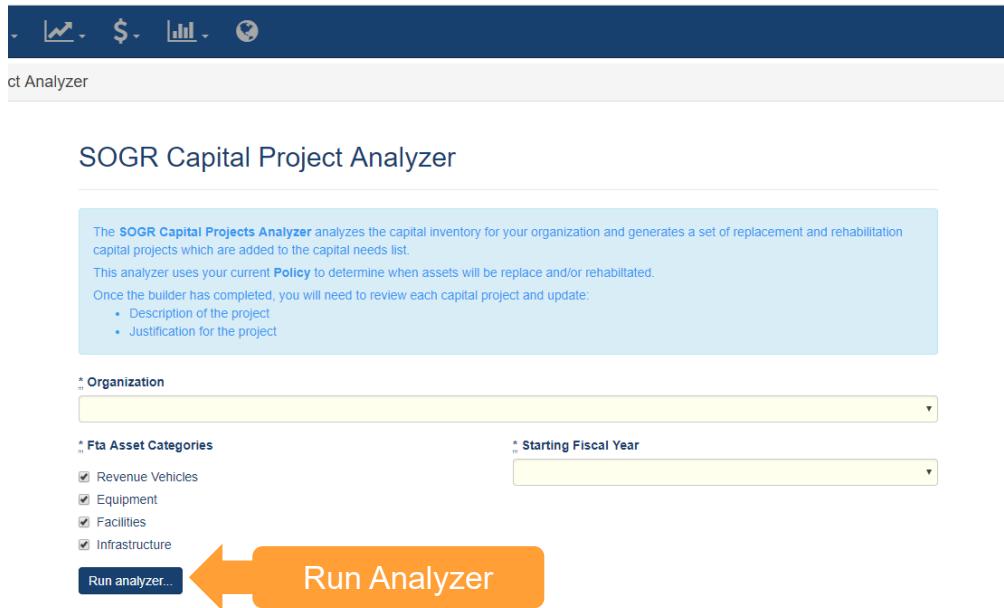
- Project:** ACTS 22-23 #6022, Total Cost \$660,407, Type Replacement, SOGR Yes.
- ALI Details:** Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04 9 assets \$660,407 (e)
- Project:** AMTRAN 22-23 #4019, Total Cost \$41,056, Type Replacement, SOGR Yes.
- ALI Details:** Acquisition Shop Equipment assets. 11.42.06 3 assets \$7,387 (e)
- Project:** AMTRAN 22-23 #4026, Total Cost \$796, Type Replacement, SOGR Yes.
- ALI Details:** Acquisition ASP Software assets. 11.42.08 2 assets \$1,074 (e)
- ALI Details:** Acquisition Miscellaneous Equipment assets. 11.42.20 5 assets \$31,695 (e)
- ALI Details:** Acquisition Surveillance/Security Systems assets. 11.32.07 1 assets \$100 (e)

A callout box indicates "Move to FY 26-27" for one of the ALIs.

8.2 State of Good Repair (SOGR) Capital Project Analyzer

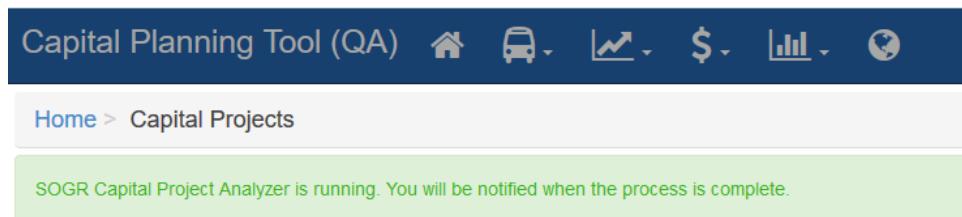
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates 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 115 Running SOGR Capital Project 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 116 SOGR Capital Project Analyzer Processing

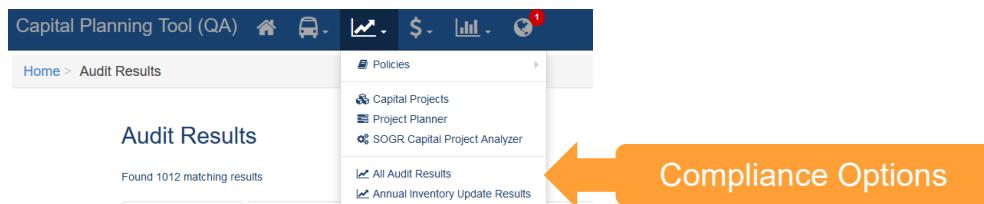


9.0 Compliance

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 117 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 118 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". Above the results table are several filter options: "Revenue Vehicles", "failed", "Annual Inventory Update", and a dropdown menu. Below these filters is a table with columns: Org, Audit, Asset Tag, Description, Result, and Updated At. The table lists various audit results for different vehicles. An orange callout bubble with the text "Export Results" points to the first row of the table. Another orange callout bubble with the text "Filter Results" points to the filter options above the table. A blue callout bubble with the text "Remember to check the appropriate boxes to export the rows you desire" points to the "Org" column header, indicating that users can select multiple rows to export.

| Org | Audit | Asset Tag | Description | Result | Updated At |
|-------|-------------------------|----------------------|------------------|--------|------------|
| CCTA | Annual Inventory Update | Revenue Vehicles 105 | GIL Low Floor | failed | 03/30/2018 |
| CATA* | Annual Inventory Update | Revenue Vehicles 305 | CMD Express 3500 | failed | 03/30/2018 |
| CTDC | Annual Inventory Update | Revenue Vehicles 306 | FRD E350 | failed | 03/30/2018 |
| CTDC | Annual Inventory Update | Revenue Vehicles 307 | FRD E350 | failed | 03/30/2018 |
| CTDC | Annual Inventory Update | Revenue Vehicles 401 | FRD E450 | failed | 03/30/2018 |
| CTDC | Annual Inventory Update | Revenue Vehicles 402 | FRD E450 | failed | 03/30/2018 |

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 119 Available Funding Programs

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area is titled 'Home > Funding Programs > All'. On the left, there's a table listing 'Funding Programs' with columns for Name, Source, Type, and Status. A modal window is open over the table, containing a sidebar with links for 'Programs', 'Federal', 'State', 'Local', 'Templates', 'Buckets', and '+ Add Funding Program'. The main body of the modal lists various program names like 5307, 5308, 5309, etc., each with a 'Pct Match' value. A large orange callout box with the text 'Available Funding Programs' has an arrow pointing to the list of programs. Another orange arrow points from the 'Add Funding Programs' button at the bottom left of the modal to the '+ Add Funding Program' link in the sidebar.

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 120 Funding Program Details

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area is titled 'Home > Funding Programs > 5307'. On the left, there's a summary card for program \$5307 with fields for Type (Federal), Formula (✓), Inflation Rate (0.000%), Pct Match (80.000%), and Life of \$ (years) (5). To the right, there's a 'Details' section with tabs for 'Details', 'Templates' (2), 'Buckets' (21), 'Assets' (827), 'Documents' (0), and 'Comments' (0). A large orange callout box with the text 'Additional Program Information' has an arrow pointing to the 'Details' tab in the navigation bar.

10.2 Grants

Management of Grants is carried out through the Grant selection on the Funding dropdown menu. The Grant module can be used to track Federal, State, and Local grant information, as well as track funding amounts by each grant for asset purchases. Grants can only be viewed and managed by users with the Grant Manager or Admin privilege.

Figure 121 Grants Dropdown

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

| Org | Category : Class | Avg. Age | Count | Cost |
|-------|---|----------|-------|--------------|
| RATS | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 7.2 | 11 | \$467,473 |
| CROSS | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 4.3 | 13 | \$470,801 |
| RRCSB | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 4.9 | 55 | \$2,410,798 |
| PCS | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 14.1 | 17 | \$424,827 |
| PAA | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 6.6 | 20 | \$5,016,293 |
| CVACL | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 7.9 | 49 | \$1,790,800 |
| WATA | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 8.4 | 56 | \$17,102,701 |
| WATA | Equipment : Service Vehicles (Non-Revenue) | 3.5 | 10 | \$231,767 |
| WATA | Equipment : Capital Equipment | 7.3 | 19 | \$742,599 |
| WATA | Facilities : Administration | 14.0 | 1 | \$4,000,000 |
| STJOE | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 10.6 | 9 | \$407,247 |
| BESH | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 8.5 | 4 | \$181,115 |
| RAARC | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 4.0 | 25 | \$752,062 |
| GRAF | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 19.5 | 37 | \$804,698 |
| ARCPW | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 8.1 | 16 | \$667,613 |
| NARL | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 5.7 | 81 | \$33,484,150 |
| NARL | Equipment : Capital Equipment | 6.2 | 66 | \$483,872 |
| NARL | Facilities : Administration | 14.5 | 4 | \$5,800,028 |
| NARI | Facilities : Passenger | 15.1 | 8 | \$7,788,885 |

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

Figure 122 Adding a Grant

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

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

Add a Grant

You'll then be directed to fill out all required fields, as depicted on the details tab. Once you add the grant, you will be directed to the grant details page.

Figure 123 Adding Required Details (New Grants)

Home > Grants > New

Add Grant

Details

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

Add Grant & Go to Grant Detail Page

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

Figure 124 Grants Table

Home > Grants

Grants

Filtered

Status: In Development / Open

Filter Viewable Grants

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

Export Grant Data

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

Figure 125 Accessing an Existing Grant

Home > Grants

Grants

Filtered

Status: In Development / Open

Access an Existing Grant

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

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

Figure 126 Editing or Updating an Existing Grant

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

Details

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

All grants have a three-stage lifecycle: In Development, Open, and Closed. When a grant is first created, it starts in the “In Development” status. Grants in the In Development Status are for those grants that are still being edited and are not ready for use. Once a grant is “Published”, it moves to the “Open” status and the grant is ready for use. While in the Open status, individual grants and associated apportionment values will be available as selections within the “Procurement & Purchase” section of each asset profile. When a grant is no longer being used, the grant should be “Closed”. When in a Closed status, the grant is not editable and is no longer available as a selection within an asset profile. Should a grant be closed in error, users can select the “Reopen” action, returning the grant to an Open status.

Figure 127 Managing the Lifecycle of a Grant

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

Details

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

Grant amendments can be managed by accessing the Amendments tab within a grant profile. Existing amendments can be exported, viewed edited, or deleted from the Amendments table. New amendments can be added by selecting the “Add Amendment” button.

Figure 128 Managing Grant Amendments

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

Add a Grant Amendment

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

Showing 1 to 0 of 0 rows

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

Figure 129 Adding Required Details (Grant Amendments)

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

Add Amendment

* Amendment Number

* Update Grant Number
 Yes
 No

* Grant Number

Comments

+ Add Amendment **Cancel**

11.0 Reports

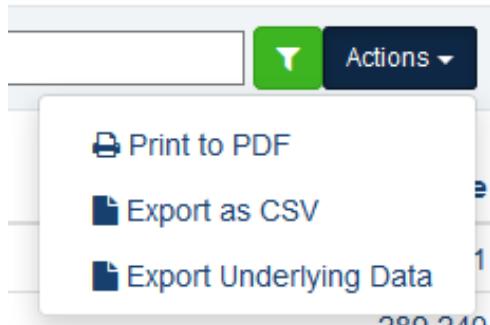
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 130 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. Below the table is a section titled 'Num. Projects' and 'Cost' with two rows: AMTRAN and ATA.

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 131 Report Exports

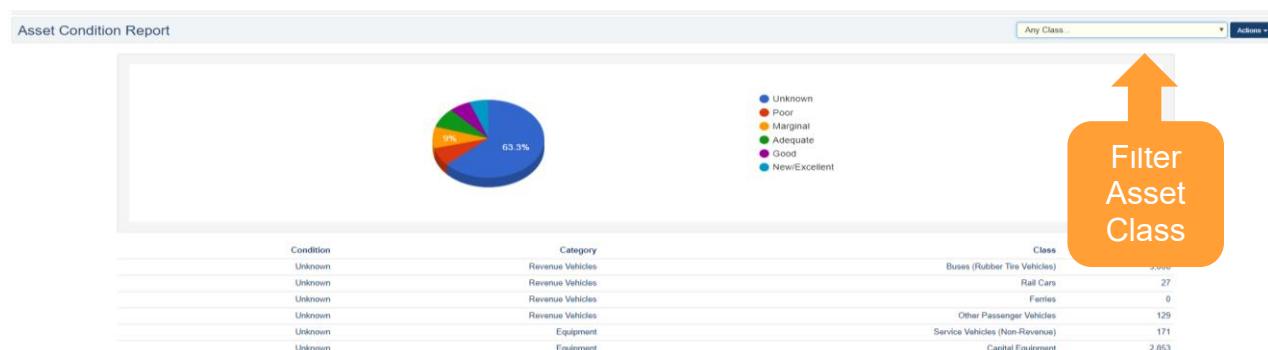


11.1 Inventory Reports

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 132 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 133 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 134 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 135 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 136 Unconstrained Capital Projects Report



11.3 System Reports

System reports keep track of system-related functional metrics.

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

Figure 137 Issues Report

| ORGANIZATION | TYPE | DATE/TIME | COMMENTS | BROWSER | FIRST NAME | LAST NAME | PHONE | ISSUE_STATUS | RESOLUTION_COMMENTS |
|--------------|------|-------------------------|---|-----------------|------------|-----------|------------------|--------------|---------------------|
| BPT | Bug | 2015-06-10 19:20:41 UTC | When exporting vehicle information from the asset inventory to Excel, fields that have a symbol or check mark are blank in excel. For example, I selected 40ft vehicles and selected/deselected columns. When I exported to Excel, the ADA field (which was displayed as check marks in CPT) is blank for each asset. | Microsoft IE 11 | Stephen | Panko | 9,999,999,999.00 | Open | |
| BPT | Bug | 2015-06-12 16:46:05 UTC | On Wednesday June 10th Dana Moyer from STS reached out to me to request help updating the mileages for all of her vehicles. She said the every month they try to update the mileages for all of her vehicles and so I suggested she do a bulk/mass upload to make it easier. However, when we tried to download an inventory template we both were unable to do this (I ran into the "Ooops... there was an error" screen* but I'm not sure what Dana got) Shortly after I got off the phone with Dana I logged in to production and I was able to download the template. However, I haven't been able to get a hold of Dana since our discussion on Wednesday to see if it worked for her. I will keep trying to reach out to her to see if it she is able to download the template and do the mass upload thereafter. | Google Chrome | Patrick | Sosik | 9,999,999,999.00 | Open | |
| BPT | Bug | 2015-06-19 11:42:17 UTC | Jeff Glisson of SCTA is attempting to add assets and getting the "Ooops Error 500 Application Error" From Jeff. "Yesterday and today for a couple of times, I have been unable to use the CPT to add the information on the two minivans. I logged in... clicked on Add Assets under inventory... clicked on Van Asset Type... clicked on Create New Asset... and received the attached error message.* | Microsoft IE 11 | Kyle | Eckert | 717-772-5614 | Open | |

11.4 Planning Reports

Planning Reports are reports that analyze asset-based data such as state of good repair, asset status, and metrics related to service life goals and performance.

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

Figure 138 Revenue Vehicle Replacement Report

| Revenue Vehicle Replacement Report | | | | | | |
|------------------------------------|------------------|------------------------------|---------------------------|-------|---------------|------------------|
| All Transit Operators | | | | | | |
| Fiscal Year | Category | Class | Sub Type | Count | Book Value | Replacement Cost |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Sedan/Station Wagon | 19 | \$220,647 | \$1,032,574 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Commuter/Suburban | 28 | \$10,703,185 | \$15,351,540 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 35 FT | 156 | \$33,434,345 | \$64,564,155 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 40 FT | 151 | \$25,096,859 | \$65,899,722 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus < 30 FT | 404 | \$22,996,202 | \$117,170,310 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus 30 FT | 59 | \$12,696,894 | \$20,638,200 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Trolley Std | 2 | \$485,086 | \$717,256 |
| FY 19-20 | Revenue Vehicles | Buses (Rubber Tire Vehicles) | Van | 936 | \$24,405,851 | \$24,272,352 |
| FY 19-20 | Revenue Vehicles | Other Passenger Vehicles | Commuter Rail Car Trailer | 71 | \$112,539,277 | \$25,462,588 |

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

Figure 139 State of Good Repair Report

| State of Good Repair Report | | | | | |
|--|--------------------------------|-----------------------------|-------|---------------|------------------|
| | | | | Jump to... | Actions ▾ |
| State of Good Repair: All Transit Agencies | | | | | |
| Category | Class | Sub Type | Count | Book Value | Replacement Cost |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Articulated | 11 | \$6,197,520 | \$8,414,445 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 35 FT | 438 | \$138,243,902 | \$189,321,201 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Sedan/Station Wagon | 27 | \$416,191 | \$1,476,958 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Commuter/Suburban | 161 | \$67,597,460 | \$92,477,734 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 40 FT | 623 | \$208,254,531 | \$285,018,765 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus < 30 FT | 736 | \$53,347,885 | \$217,175,923 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus 30 FT | 154 | \$35,377,187 | \$55,183,445 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Van | 1,204 | \$36,625,492 | \$31,357,436 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Trolley Std | 31 | \$8,585,473 | \$12,003,406 |
| Revenue Vehicles | Other Passenger Vehicles | Commuter Rail Car Trailer | 100 | \$167,850,515 | \$36,271,696 |
| Revenue Vehicles | Rail Cars | Light Rail Car | 9 | \$25,638,417 | \$3,887,370 |
| Revenue Vehicles | Rail Cars | Commuter Locomotive Diesel | 20 | \$74,188,285 | \$65,980,817 |
| Equipment | Service Vehicles (Non-Revenue) | Pickup Utility Truck | 75 | \$436,717 | \$2,616,326 |
| Equipment | Service Vehicles (Non-Revenue) | Sports Utility Vehicle | 85 | \$693,546 | \$2,303,917 |
| Equipment | Service Vehicles (Non-Revenue) | Van | 79 | \$729,509 | \$2,272,877 |
| Equipment | Service Vehicles (Non-Revenue) | Sedan/Station Wagon | 62 | \$437,762 | \$1,546,568 |
| Equipment | Service Vehicles (Non-Revenue) | Other Support Vehicle | 31 | \$212,606 | \$1,610,645 |
| Equipment | Service Vehicles (Non-Revenue) | Tow Truck | 2 | \$0 | \$344,361 |
| Equipment | Capital Equipment | Bus Maintenance Equipment | 1,033 | \$7,860,493 | \$11,976,480 |
| Equipment | Capital Equipment | Other Maintenance Equipment | 140 | \$11,904,184 | \$16,743,863 |
| Equipment | Capital Equipment | Rail Maintenance Equipment | 2 | \$73,195 | \$1,180,195 |
| Equipment | Capital Equipment | Other Facilities Equipment | 416 | \$3,164,904 | \$5,017,581 |

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

Figure 140 Disposition Report

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

The Asset Service Life Summary Report displays all asset categories, listed by subtype, and calculates the quantity and percentage of assets that are past their Estimated Service Life in month, miles, and the quantity and percentage that have fallen below the TERM threshold as set in the Asset Replacement/Rehabilitation Policy. Data can be filtered by Asset Category, and by a minimum and maximum range in months of assets beyond their Estimated Service Life. A drill-down of data is provided on an organization-level basis, while the table, and the underlying data used to make the calculations can be exported as well.

Figure 141 Asset Service Life Summary Report

| Capital Planning Tool (QA) | | | | | |
|--|-----------------------|----------|----------------------|----------------------|------------------------|
| Home > Reports > Asset Service Life Summary Report | | | | | |
| Asset Service Life Summary Report | | | | | |
| Organization | Subtype | Quantity | # Past ESL (Mo.) Pct | # Past ESL (Mi.) Pct | # Past TERM Thresh Pct |
| All (Filtered) Organizations | Bus < 30 FT | 123 | 55 45% | 29 24% | 63% |
| All (Filtered) Organizations | Bus 30 FT | 9 | 6 67% | 9 100% | |
| All (Filtered) Organizations | Bus Commuter/Suburban | 14 | 0 0% | 0 0% | |

Filter or Export

The TAM Service Life Summary Report displays all asset categories, listed by subtype, and calculates the following:

- Revenue Vehicles and Equipment—Service Vehicles: Quantity and percentage that are past their Useful Life Benchmark in months;
- Facilities (Primary): Quantity and percentage of Facilities (Primary) that have fallen below the TERM Policy value; and
- Infrastructure—Track: Linear asset miles of Infrastructure that have Active Performance Restrictions.

The ULB, and TERM values pull from the most recent year of the TAM Policy for each organization that are either in a Pending Activation or Active status. Data can be filtered by Asset Category, and a drill-down of data is provided on an organization-level basis, while the table, and the underlying data used to make the calculations can be exported as well.

Figure 142 TAM Service Life Summary Report

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

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 143 Asset Fleet Builder

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'. Below this is a search bar with various filters like 'Any Asset Type', 'Tag/ID/VIN/Plate', 'Any Mfr...', etc. A progress bar indicates 'Loading, please wait...'. On the right, a callout box contains the note: 'Note: Running the Fleet Builder will delete all existing fleet data, if previously run.' At the bottom, there are two buttons: 'Build Revenue Vehicles Fleets' and 'Build Support Vehicles Fleets'.

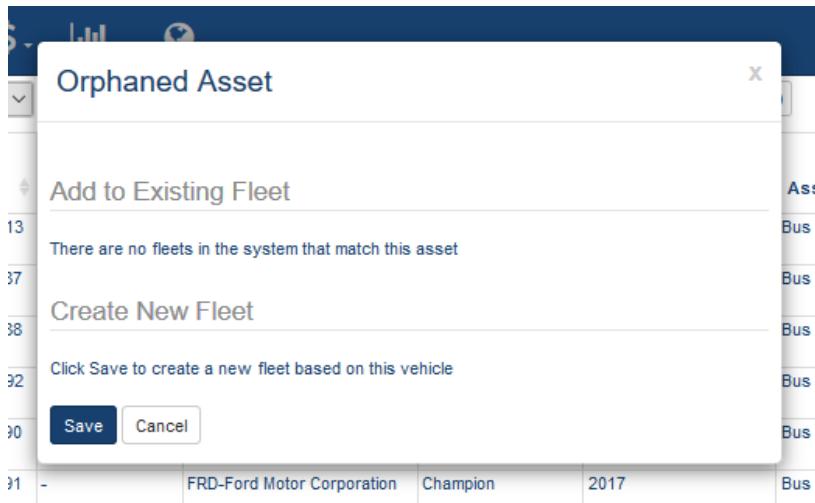
Note: Running the Fleet Builder will delete all existing fleet data, if previously run.

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

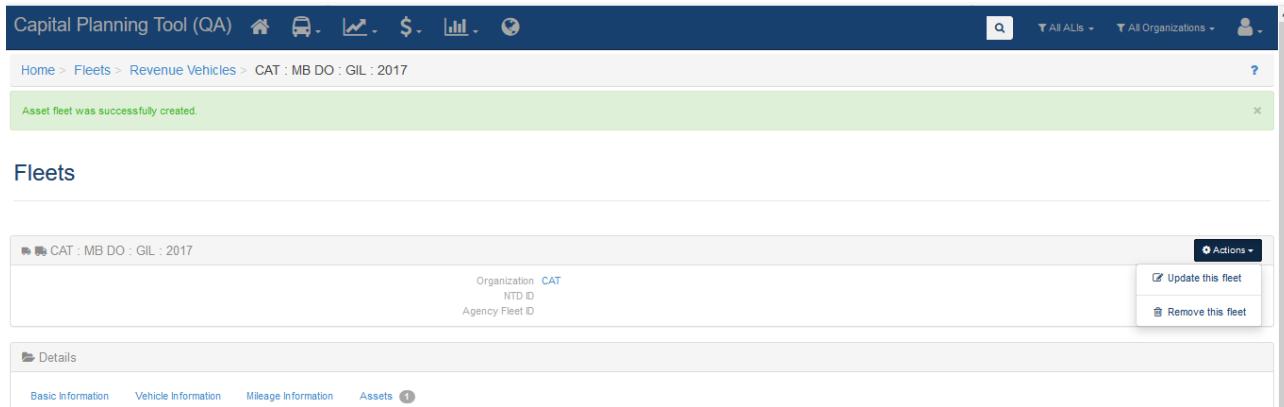
Figure 144 Asset Fleet Builder—Orphaned Assets

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. In the 'Action' column, each row has a blue button labeled '+ Add to Fleet'. An orange arrow points from the 'Manage Fleets' tab to the 'Orphaned Assets' section. Another orange arrow points from the '+ Add to Fleet' button in the table to the '+ Add to Fleet' button in the 'Orphaned Asset' modal window.

Selecting “Add to Fleet” on the right allows users to add assets to a current fleet or create a new fleet, and will limit options of existing fleets only if all shared characteristics match. Clicking “Save” will either add to an existing fleet, or create a new fleet, depending on what you choose, and allow you to specify details about that fleet.

Figure 145 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 146 Adding a New Fleet**Figure 147 Update Asset Fleet Details**

Update Asset Fleet

NTD ID

0

Agency Fleet ID

NTD Notes

Notes will appear in generated NTD report.

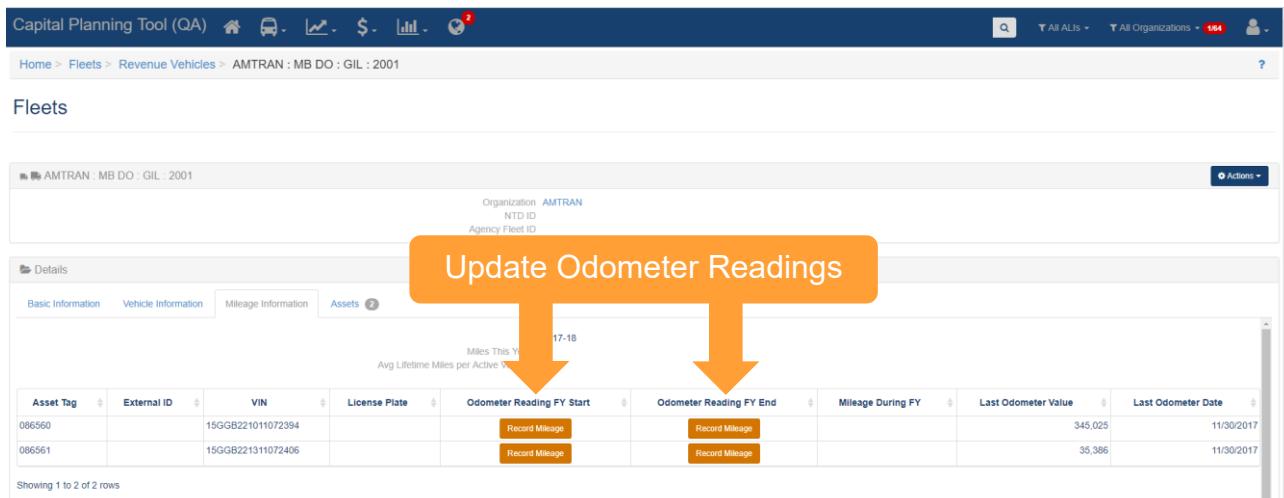
Update Asset fleet**Cancel****Figure 148 Update Odometer Readings**

Figure 149 Remove or Add Assets from within a Fleet

The screenshot shows a web-based application interface for managing assets. At the top, there's a navigation bar with links for Home, Fleets, Revenue Vehicles, and specific filters for All ALIs and All Organizations. Below the navigation is a breadcrumb trail: Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001. The main content area is titled 'Fleets' and shows a table of assets for the organization AMTRAN. The table has 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 visible: one for asset 086561 with VIN 15GGB221311072406 and another for asset 086560 with VIN 15GGB221011072394. Both assets are listed as 'In Service'. The 'Action' column contains 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' and a downward-pointing arrow is positioned over the 'Action' column header.

| 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 150 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 151 Table of Previously Generated NTD Reports

The screenshot shows the 'NTD Reporting' module. At the top, there's a breadcrumb trail: Home > Forms > NTD Reporting. Below the breadcrumb is a search bar and filter options for 'Organization' (set to 'CARBON'), 'Fiscal Year' (set to 'FY 16-17'), 'Status' (set to 'Unsubmitted'), and 'Created At' (set to '10:41 AM 10/19/2018'). The main area is a table with columns: Organization, Fiscal Year, Status, Created At, and Creator. One row is visible, showing 'CARBON' as the organization, 'FY 16-17' as the fiscal year, 'Unsubmitted' as the status, '10:41 AM 10/19/2018' as the created at time, and 'Elizabeth Bonini' as the creator. Two orange arrows point to the table: one pointing to the first row and another pointing to the 'New NTD Form' button located above the table.

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 152 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 153 NTD Report Details and Data

CARBON FY 16-17

Actions

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

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

Submit, Create a New Version, or Remove

Details

| Date | Creator | Download | Comments | Process Log |
|---------------------|------------------|-------------|----------|-------------|
| 10:41 AM 10/19/2018 | Elizabeth Bonini | Unsubmitted | + | |

Access Forms or Add a Comment

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

Figure 154 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

13.0 Admin Tools

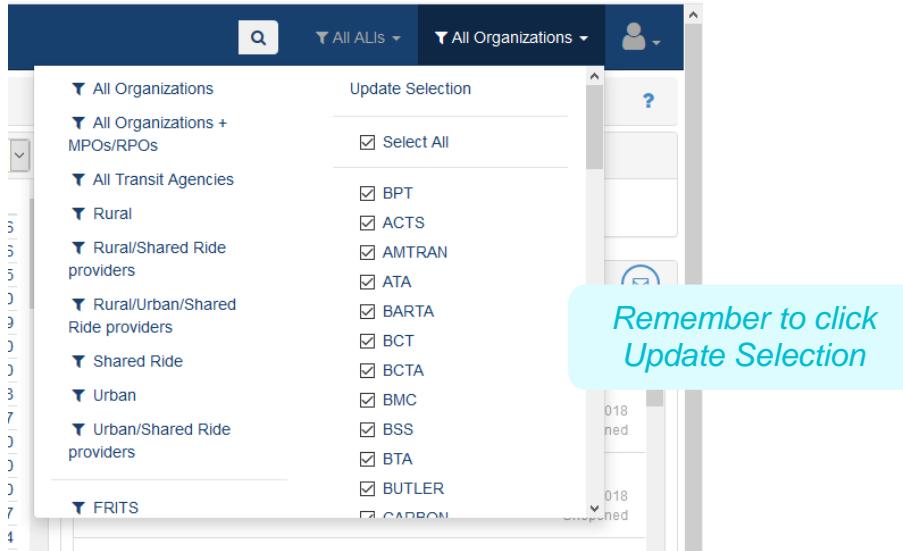
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

Figure 155 Admin User and Organization Options

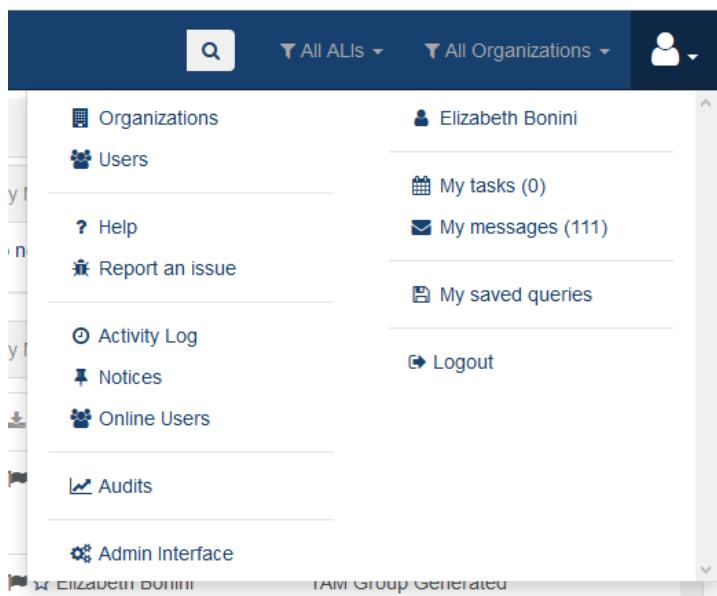


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

Figure 156 Organizations



In your User Options, you'll also see some common elements with other users (though they have been revamped for admins) and some additional functionality.

Figure 157 Admin User Options

13.1 Organizations

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

Figure 158 Admin Organizations

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

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

Figure 159 Add an Organization

13.2 Users

The users page also has some additional functionality. It provides an overview of all users in the system, and provides the ability to add new users or filter user data.

Figure 160 Admin Users

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

Figure 161 Add a User

New User

User Organizations

* Organization: Not Selected

Organizations:

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

Choose All >

Selected:

Roles & Privileges

* User Role: [dropdown]

User Privileges:

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

User Details

* First Name: [text input]

* Last Name: [text input]

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

13.3 Notices

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

Figure 162 Notices

+ Add a notice

| Type | Subject | Summary | Visible | Start Display | Display Until | Actions |
|----------------------|---------------------------------------|------------------------------------|---------|---------------------|---------------------|---------|
| System Notice | Welcome to the Capital Planning Tool. | IMPORTANT NOTICE! | | 01:00 PM 06/02/2015 | 11:59 PM 06/02/2015 | |
| System Notice | System Maintenance | System Maintenance Monday July 6th | | 01:00 PM 07/02/2015 | 11:59 PM 07/02/2015 | |
| System Notice | IMPORTANT NOTICE! | Asset Loading | | 07:00 AM 12/07/2015 | 11:00 PM 12/14/2015 | |
| System Notice | System Maintenance | System Maintenance | | 10:00 AM 02/26/2016 | 11:00 PM 02/29/2016 | |
| System Notice | SYSTEM NOTICE | System Outage - 9/10/16-9/12/16 | | 10:00 AM 09/09/2016 | 11:59 PM 09/09/2016 | |
| Informational Notice | 2017 AUDIT PERIOD | 2017 Revenue Vehicle Audit | | 02:00 PM 01/04/2017 | 11:59 PM 01/04/2017 | |
| System Notice | SYSTEM NOTICE | System Outage - 2/10/17-2/13/17 | | 02:00 PM 02/10/2017 | 08:00 AM 02/13/2017 | |
| System Notice | SYSTEM OUTAGE | System Outage - 7/21 to 7/24 | | 02:00 PM 07/19/2017 | 08:00 AM 07/24/2017 | |
| System Notice | SYSTEM OUTAGE | System Outage - 11/17 to 11/20 | | 08:00 AM 11/14/2017 | 07:00 AM 11/21/2017 | |
| System Notice | SYSTEM OUTAGE | SYSTEM OUTAGE 11/30 5PM-6PM | | 03:00 PM 11/30/2017 | 11:00 PM 11/30/2017 | |
| System Notice | SYSTEM OUTAGE | System Outage - 12/29-1/2 | | 01:00 PM 12/28/2017 | 11:00 AM 01/03/2018 | |
| System Notice | SYSTEM OUTAGE | System Outage - 1/26-1/29 | | 01:00 PM 01/26/2018 | 07:00 AM 01/29/2018 | |
| System Notice | test | test | ✓ | 12:00 AM 07/20/2018 | 01:00 PM 07/20/2018 | |

Showing 1 to 13 of 13 rows 200 ▾ rows per page

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

Figure 163 Add a Notice

New Notice

* Subject
[Text input field]

* Summary
[Text input field]

Details
[Text input field]

Organization
[Dropdown menu: All]

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

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

* Notice Type
[Dropdown menu: System Notice]

Create Notice

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

Figure 164 Notice on the Dashboard

9

536
786
775
280
000

All ALIs ▾ All Organizations ▾

?

My Notices

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

My Messages

13.4 Online Users

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

Figure 165 Active Users

The screenshot shows a table titled "Active User Sessions" with the following columns: Session Id, User, IP Addr, Organization, Started, Expires, Age, Last View Time, Inactive Time, View Count, and Last View. The data is as follows:

| Session Id | User | IP Addr | Organization | Started | Expires | Age | Last View Time | Inactive Time | View Count | Last View |
|----------------------------------|------------------|-------------------|--------------|------------------------|------------------------|-------------------|------------------------|-------------------|------------|----------------------|
| fa72aadd0738752943871b731d54dcf0 | Elizabeth Bonini | 74.75.225.138 BPT | | 01:59 PM 07/12/2018 | 10:53 PM 07/12/2018 | 7 days 22h 30m | 05:53 PM 07/12/2018 | 7 days 18h 36m | 696 | /notifications/count |
| 5eeba2509d607833bd955f9fb5bb756f | Elizabeth Bonini | 72.94.199.38 BPT | | 01:59 PM 07/12/2018 | 08:43 PM 07/12/2018 | 7 days 22h 30m | 03:43 PM 07/12/2018 | 7 days 20h 46m | 626 | /notifications/count |
| b8de20b814a0c0fc12f86826af448cc4 | Elizabeth Bonini | 73.219.188.37 BPT | | 01:59 PM 07/12/2018 | 02:27 AM 07/13/2018 | 7 days 22h 30m | 09:27 PM 07/12/2018 | 7 days 15h 2m | 1,841 | /notifications/count |
| 97ce63ac5f8ab1db8f396ec91b4f5c38 | Elizabeth Bonini | 209.6.55.63 BPT | | 01:58 PM 07/13/2018 | 12:49 AM 07/14/2018 | 6 days 22h 31m | 07:49 PM 07/13/2018 | 6 days 16h 41m | 1,286 | /notifications/count |
| 597442dc0ba05a002eb54e0bf4d1b5c0 | Elizabeth Bonini | 72.94.199.38 BPT | | 10:24 AM 07/16/2018 | 11:49 PM 07/16/2018 | 4 days 2h 5m | 06:49 PM 07/16/2018 | 3 days 17h 40m | 3,144 | /notifications/count |
| a450046b60018305995392319c1781d6 | Elizabeth Bonini | 73.219.188.37 BPT | | 10:54 AM 07/16/2018 | 05:06 PM 07/16/2018 | 4 days 1h 35m | 12:06 PM 07/16/2018 | 4 days 23m | 92 | /notifications/count |
| 17c28a3fc8b598e3924b1236a7218191 | Elizabeth Bonini | 74.75.225.138 BPT | | 10:58 AM 07/16/2018 | 09:57 PM 07/16/2018 | 4 days 1h 31m | 04:57 PM 07/16/2018 | 3 days 19h 32m | 3,214 | /notifications/count |
| 09baecbbd50cc11679481d1102fb252 | Elizabeth Bonini | 209.65.164.27 BPT | | 11:14 AM 07/16/2018 | 09:14 PM 07/16/2018 | 4 days 1h 15m | 04:14 PM 07/16/2018 | 3 days 20h 15m | 1,354 | /notifications/count |
| 2b1536f075759fa78ed6a18377d0924a | Elizabeth Bonini | 72.94.199.38 BPT | | 02:39 PM 07/16/2018 | 07:49 PM 07/16/2018 | 3 days 21h 50m | 02:49 PM 07/16/2018 | 3 days 21h 40m | 81 | /notifications/count |
| 09fe1e7c64c4f95a8befff3d4496923d | Nicholas Baldwin | 72.94.199.38 BPT | | 02:49 PM 07/16/2018 | 07:53 PM 07/16/2018 | 3 days 21h 40m | 02:53 PM 07/16/2018 | 3 days 21h 37m | 26 | /notifications/count |

13.5 Audits

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

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

Figure 166 Admin Audits Page

The screenshot shows a table titled "Audits" with the following columns: Name, Description, and Instructions. The data is as follows:

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

An orange arrow points from the text "Admin Audits Page" to the "Audits" link in the sidebar menu.

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

Figure 167 Admin Audits Details Page

13.6 Admin Interface

The Admin Interface is a graphic representation of some of the databases used within the system. From here, you can adjust the content that is displayed in the various interfaces. For instance, you can adjust what capital project types are displayed in the dropdown when adding a new capital project.

Be very careful when modifying or deleting any of the information in the admin interface, as much of the system functionality resides within the Admin Interface, and any changes made may cause systemwide data inaccuracies. Always consult your primary Cambridge Systematics (CS) point of contact should you wish to make modifications to the admin interface, or are unsure of how to perform a specific function.

Figure 168 Admin Interface

| Model name | Last created | Records |
|--------------------------|--------------------|---------|
| Assets | 8 days ago | 20587 |
| Asset event types | | 19 |
| Asset groups | 4 months ago | 10 |
| Capital project types | | 4 |
| Comments | about 3 years ago | 1401 |
| Depreciation interval y | | 3 |
| Disposition types | | 5 |
| Districts | | 370 |
| District types | | 12 |
| Documents | almost 3 years ago | 1339 |
| Expense types | | 16 |
| Facility capacity types | | 4 |
| Facility features | | 8 |
| Frequency types | | 5 |
| Funding templates | 4 months ago | 33 |
| Governing body types | | 5 |
| Images | about 3 years ago | 120 |
| Issue types | | 4 |
| Leed certification types | | 5 |
| License types | | 3 |
| Maintenance types | | 4 |
| Milestone types | | |
| Notice types | | |
| Priority types | | |
| Location reference typ | | |