

TransAM

Administrative User

User Guide

prepared for

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

prepared by

Cambridge Systematics, Inc.

user guide

TransAM

General User

prepared for

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

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January 11, 2019

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1.0 Welcome!

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

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

1.1 Initial Log In and Password Reset

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

Figure 1 Password Reset Request Screen

TransAM OCPD

Instructions

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

Forgot Password

Email

Send me reset password instructions

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

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

Figure 2 Set/Reset Password Screen

TransAM OCPD

Instructions

Your password must conform to the following:

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

Change Your Password

New password

Confirm your new password

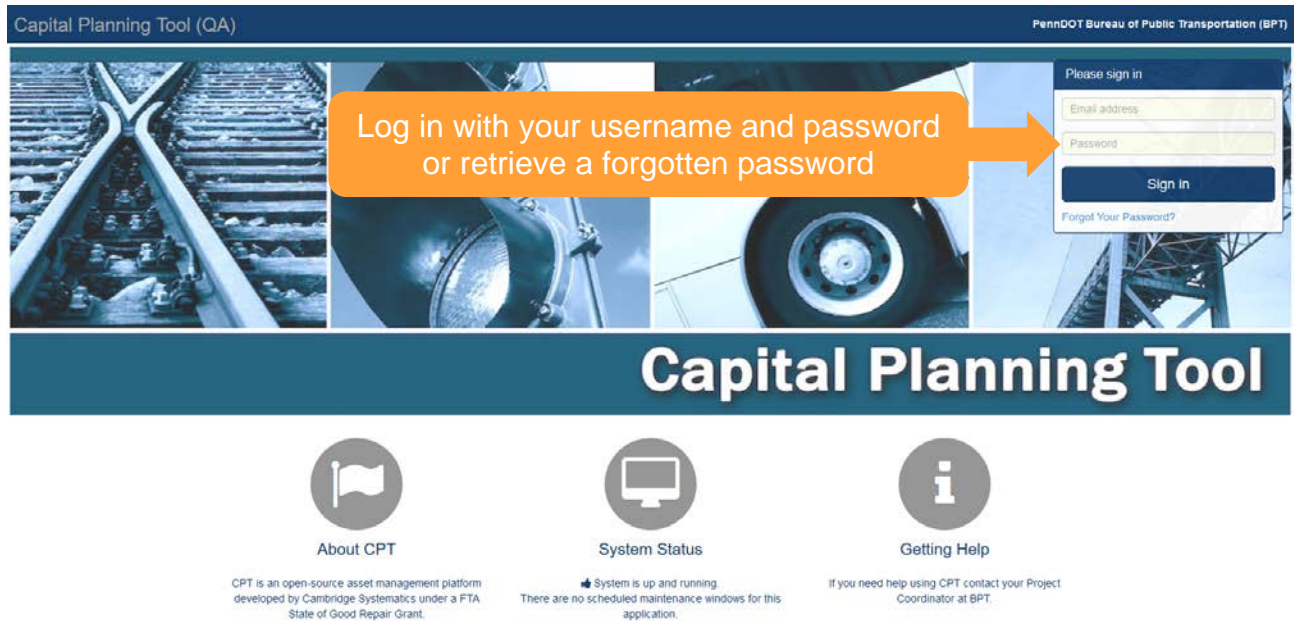
Change my password

1.2 Ongoing Site Access

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

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

Figure 3 Login Screen



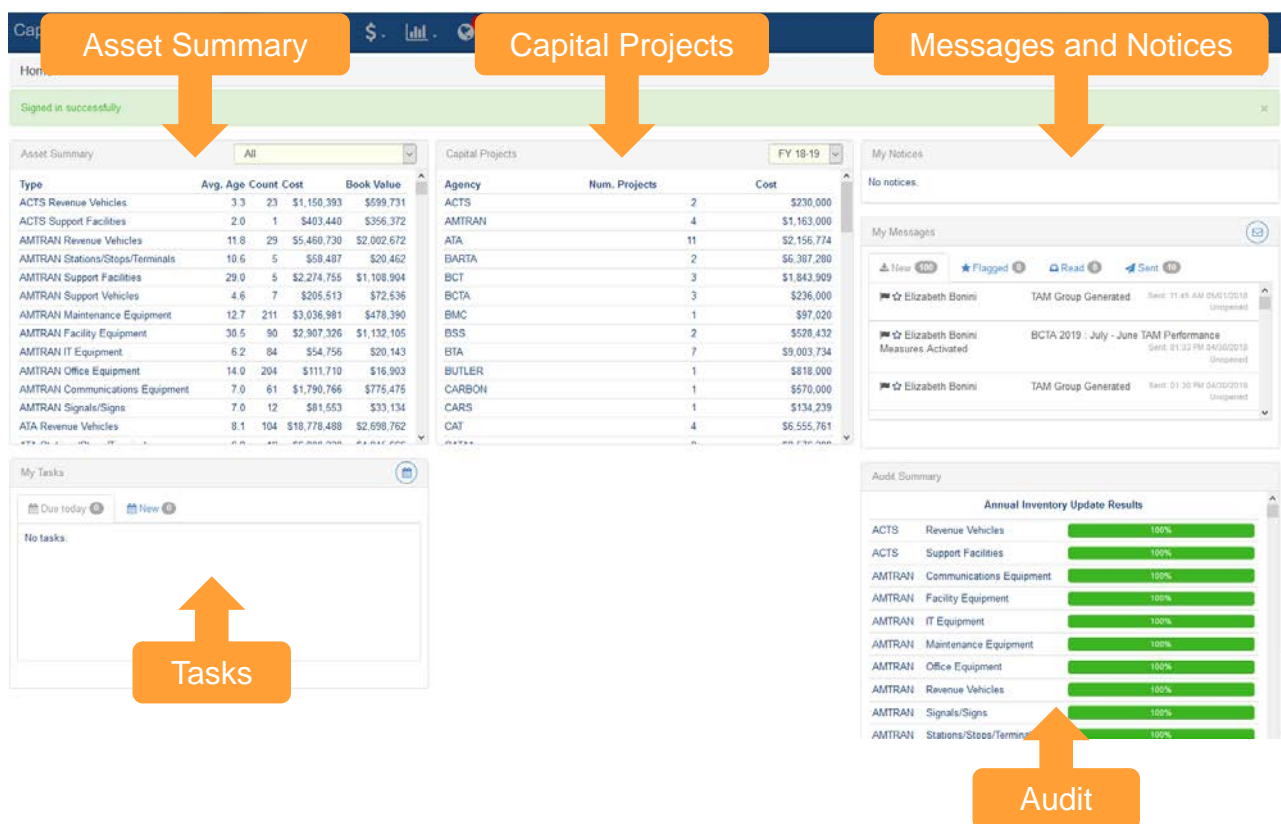
2.0 Dashboard

2.1 Dashboard Elements

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

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

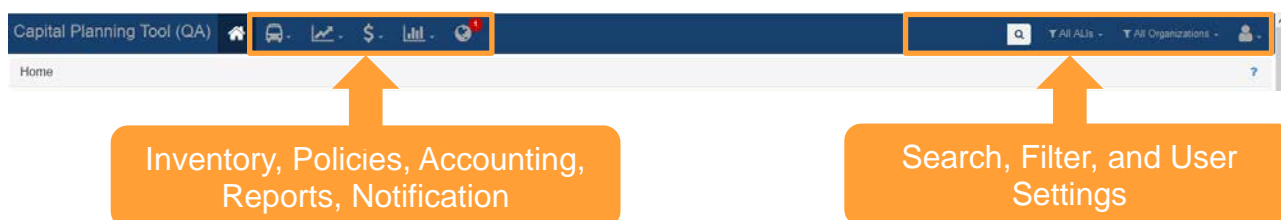
Figure 4 Dashboard Elements



2.2 Header Menu and Controls

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

Figure 5 Header Menu



3.0 General Features and Tools

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

3.1 Table Controls

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

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

Figure 6 **Sorting Controls**



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

Figure 7 **Export Button**

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

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

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

Figure 8 **Table Tools**



3.2 Site Filters

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

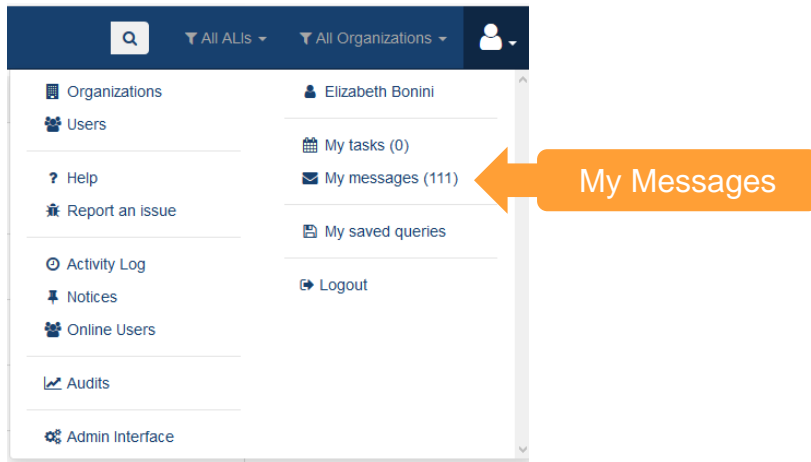
Figure 9 **Filter Icon**



3.3 Messages

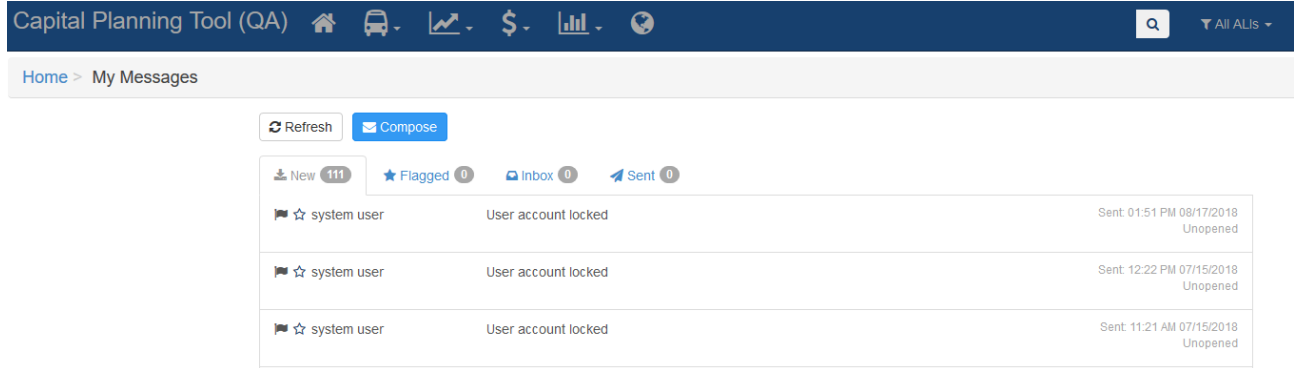
You can access Messages through the User Profile drop down menu.

Figure 10 **User Profile**
Messages



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

Figure 11 **Messages**



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

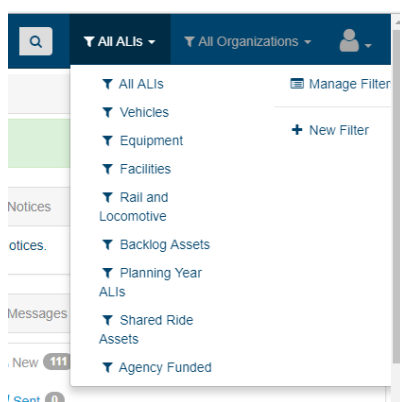
Figure 12 Message Interface

3.4 Activity Line Item (ALI) Filter

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

Figure 13 ALI Filter

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

Figure 14 ALI Filters

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

Figure 15 New ALI Filter

Capital Planning Tool (QA) Home ALI Filters > New

Details

Name
Enter a name for this filter

Description
Enter a description for this filter

Shared With
☐ No One
☐ BPT
☐ All Organizations

Parameters

Type

SOG
 All

Scope

Project Location

Asset Type

Asset Subtype

☐ In Backlog

Owner

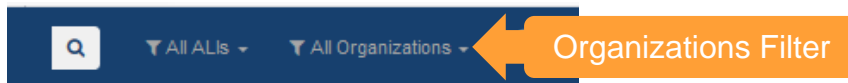
Funding

☐ Not fully funded

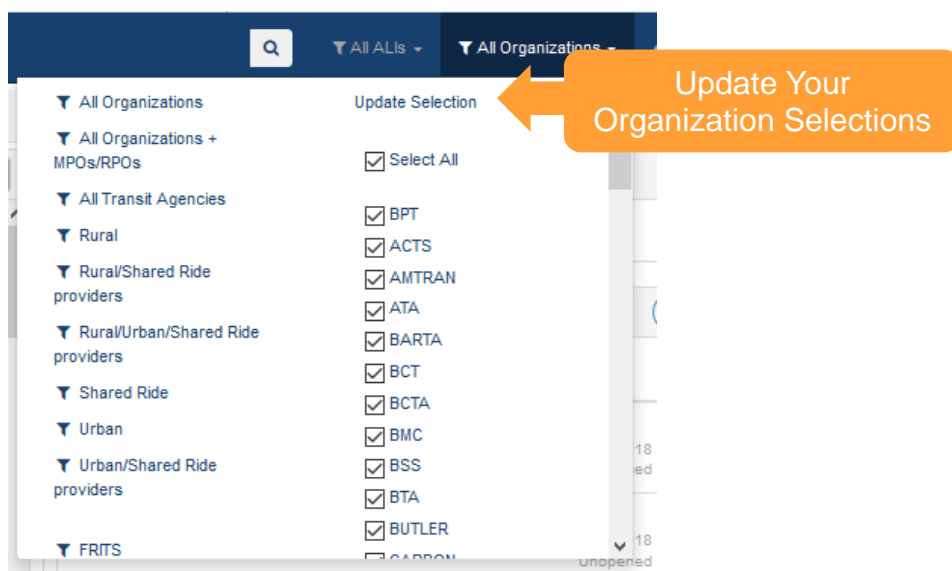
Update ALI Filter Update and Select This Filter

3.5 Organizations Filter

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

Figure 16 Organization Filter

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

Figure 17 Organization Filter Selections

3.6 Search

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

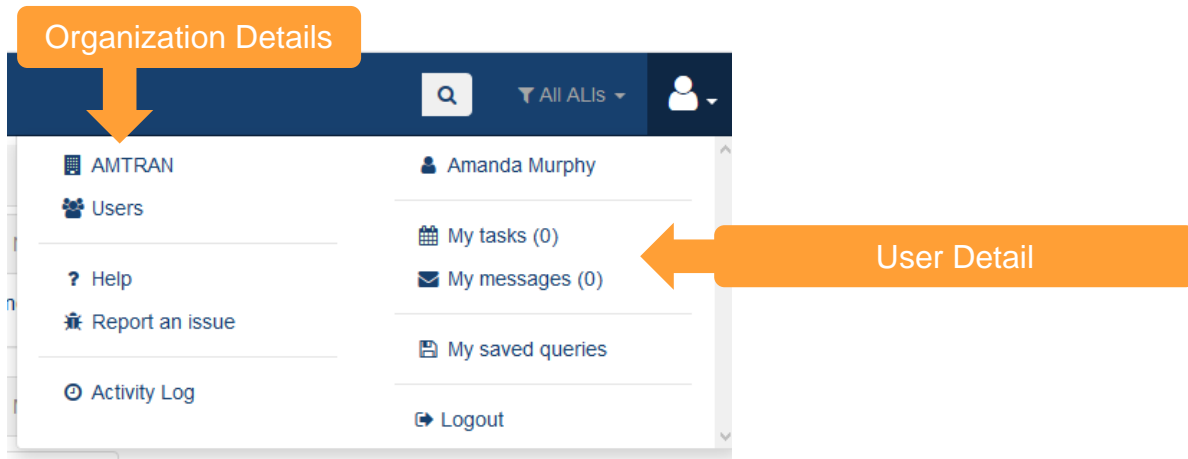
Figure 18 Search Box

3.7 User and Organization Options

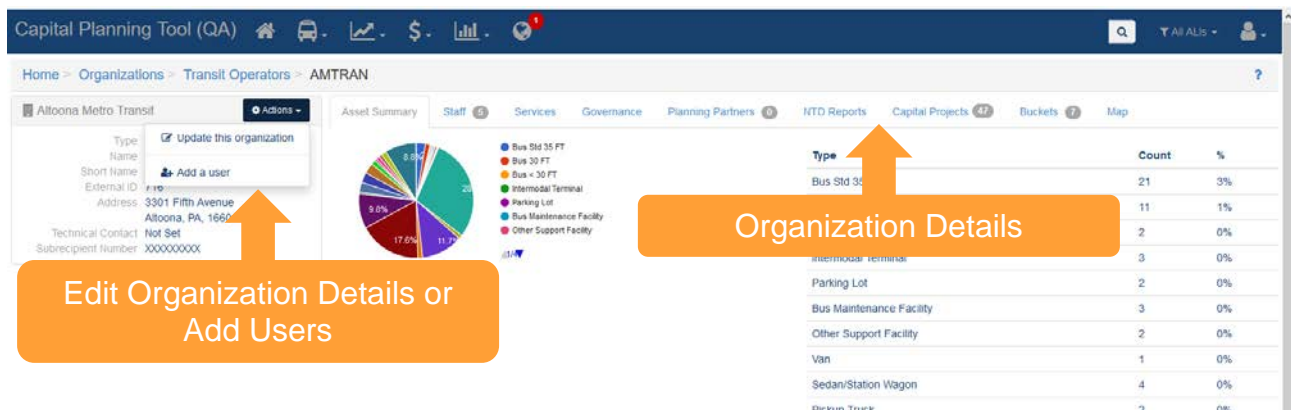
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

Figure 19 User Menu

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

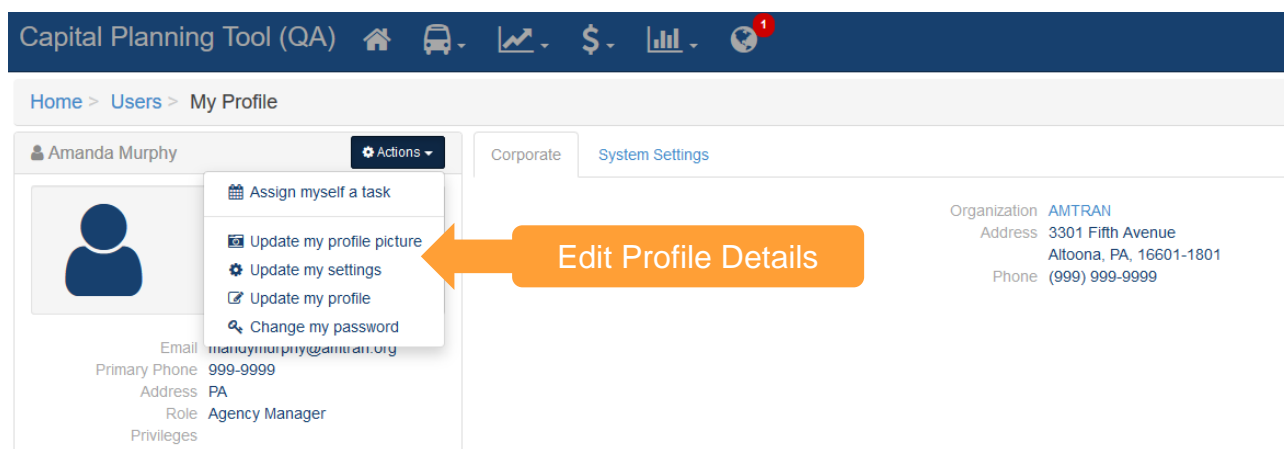
Figure 20 User Menu Dropdown

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

Figure 21 Organization Details

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

Figure 22 Profile Details



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

Figure 23 Report an Issue

Report an Issue

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

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

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

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

* Issue Type * Web Browser Type

* Comments

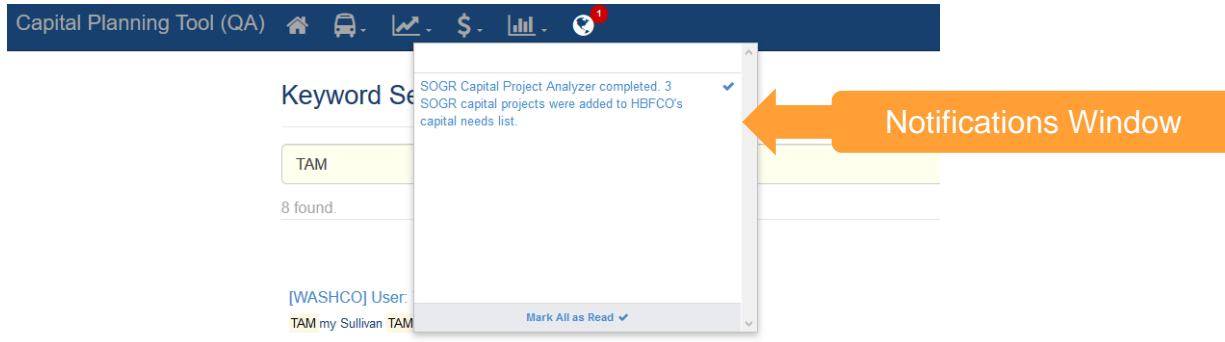
Please provide as much detail as you can...

Create Issue

3.8 Notifications

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

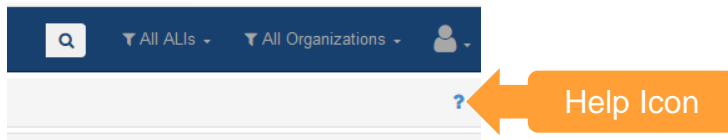
Figure 24 Notification Drawer



3.9 Help

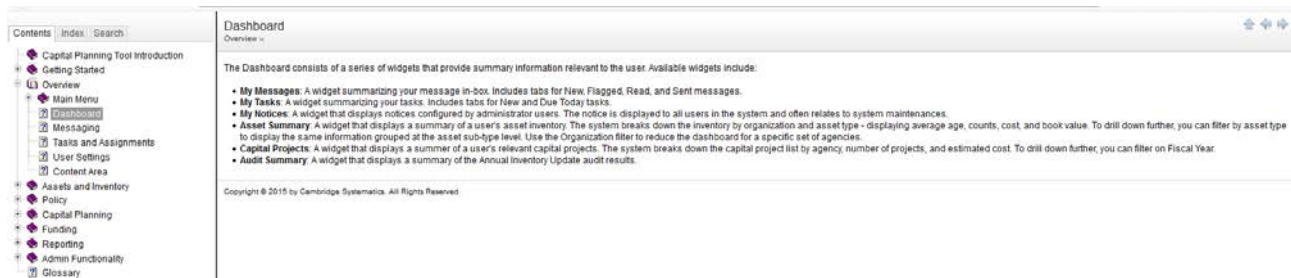
At the top right of each page is a "?" icon.

Figure 25 Help Icon



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

Figure 26 Help Content



4.0 Asset Inventory

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

Figure 27 **Asset Inventory Dropdown**



4.1 Add an Asset

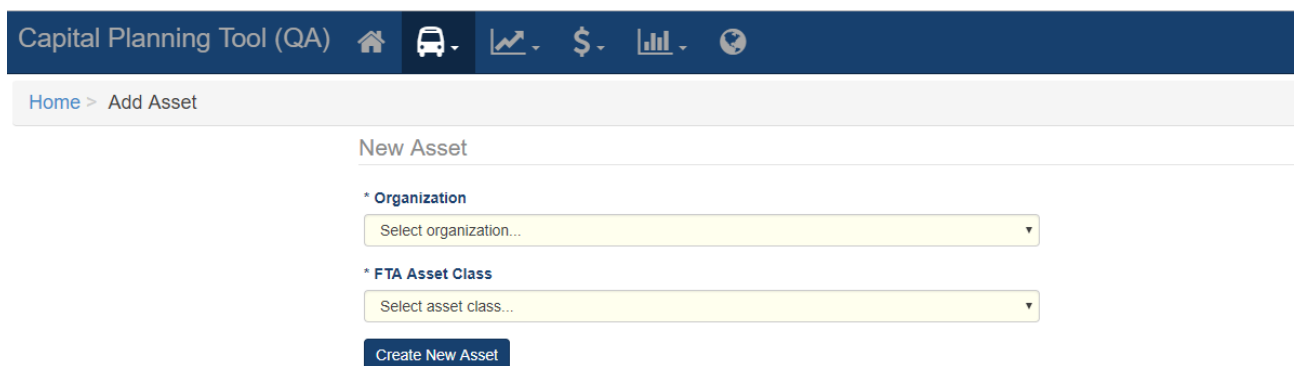
Adding new assets to the asset inventory is simple. First select “Add Asset” from the Asset Inventory dropdown.

Figure 28 Adding an Asset



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

Figure 29 Select the Organization and Asset Class



Capital Planning Tool (QA)

Home > Add Asset

New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

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

Figure 30 Adding Asset Required Details

Capital Planning Tool (QA)

Home

Required Fields Recommended Fields

Organization

* Organization
Altoona Metro Transit

Service Status

* Service Status

Identification & Classification

* Vehicle Identification Number (VIN)

* Asset ID

* Class
Buses (Rubber Tire Vehicles)

* Type

* Subtype

* Estimated Service Life (ESL) Category

Characteristics

* Manufacturer

Manufacturer (Other)

* Model

Model (Other)

* Year of Manufacture

* Fuel Type

Fuel Type (Other)

Dual Fuel Type

* Length Length Units

* Seating Capacity (ambulatory)

Any field on the required tab must be filled out

Figure 31 Add the Asset and Go To The New Record

Capital Planning Tool (QA)

Funding

* Cost (Purchase)

* Funding Type

* Direct Capital Responsibility
☒ Yes ☐ No

* Percent Capital Responsibility

* Ownership Type

Ownership Type (Other)

Procurement & Purchase

* Purchased New
☒ Yes ☐ No

* Purchase Date

Operations

* Seating Capacity (ambulatory)

* Standing Capacity

* ADA Accessible
☒ Yes ☐ No

* In Service Date

* Primary Mode

* Service Type (Primary Mode)

* Dedicated Asset
☒ Yes ☐ No

+ Add Asset & Go to New Record

Add Asset and Go To New Record Button

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Build 2.3.2-ga1 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		ACTS	
ACTS Support Facilities	2.0		AMTRAN	
ACTS Guideway	0.0		ATA	
ACTS Power & Signal	0.0		BARTA	
ACTS Track	0.0		BCT	
AMTRAN Revenue Vehicles	12.0		BCTA	
AMTRAN Stations/Stops/Terminals	11.0		BMC	
AMTRAN Support Facilities	29.4		BSS	
AMTRAN Support Vehicles	4.9		BTA	
AMTRAN Maintenance Equipment	12.9		BUTLER	
AMTRAN Facility Equipment	30.2		CARBON	
AMTRAN IT Equipment	6.6	\$54,890	CARS	
AMTRAN Office Equipment	14.1	\$112,098	CAT	
AMTRAN Communications Equipment	7.5	\$1,790,766	CATA*	
AMTRAN Signals/Signs	6.8	\$82,918	CCTA	
AMTRAN Guideway	0.0	\$0	CHESSR	
AMTRAN Power & Signal	0.0	\$0	CLARCO	
AMTRAN Track	0.0	\$0	CNTBCC	

My Tasks

Click Asset Class to access a list of assets

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)       Q ▼ All Assets ▼ All Organizations 

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	1FDDE4F56HDC18987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDDE4F58HDC18988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDDE4F5XHDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDDE4F56HDC18990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDDE4F58HDC18991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDDE4F5XHDC18989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDDE4F51HDC18993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDDE4F53HDC18994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDDE4F55HDC18995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDDE4F57HDC18996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDDE4F59HDC18997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDDE4F50HDC18998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#800	LCTA	15GGB3111J3190014	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	15GGB3111J3190015	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
*601	LCTA	1FDDE4F56HDC34954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*602	LCTA	1FDDE4F5XGDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GGB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GGB201731111860	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GGB201031111880	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GGB201431111896	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F1185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2715F1185793	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 section contains asset summary information such as: a history log, location information, asset charts, asset value information, associated capital projects, and audit results. In addition, tasks, comments, documents, and photos can all be viewed, updated, and edited.


Figure 34 Asset Record: Highlights









Capital Planning Tool (QA)       Q ▼ All Assets ▼ All Organizations 

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

Revenue Vehicle Profile

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

Highlights 

History        

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

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

Figure 35 Asset Record: Profile and Summary

4.3 Editing or Updating Existing Asset Profile Data

Editing asset profile data allows users to modify core attributes that are not expected to change, but corrections may be necessary from time to time. Profile data can be modified by clicking on the field, editing the data, and clicking the check mark; clicking the “X” or clicking outside the field will result in any changes not being saved.

Figure 36 Editing the Profile of an Existing Asset

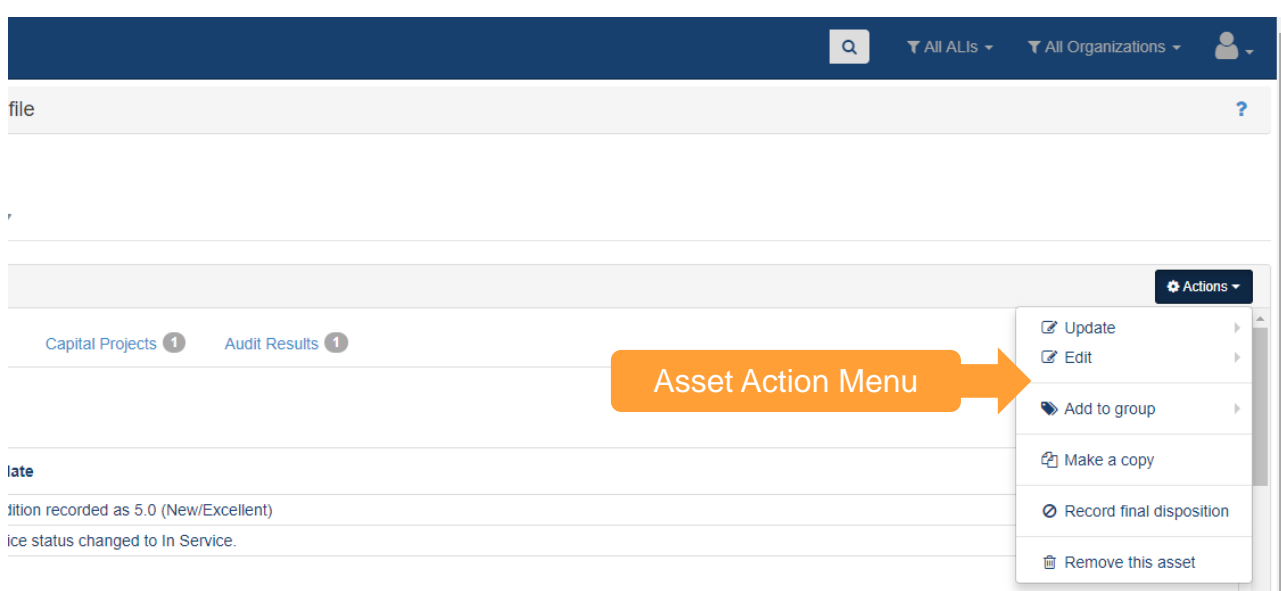
4.4 Updating Existing Asset Lifecycle Data

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

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

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

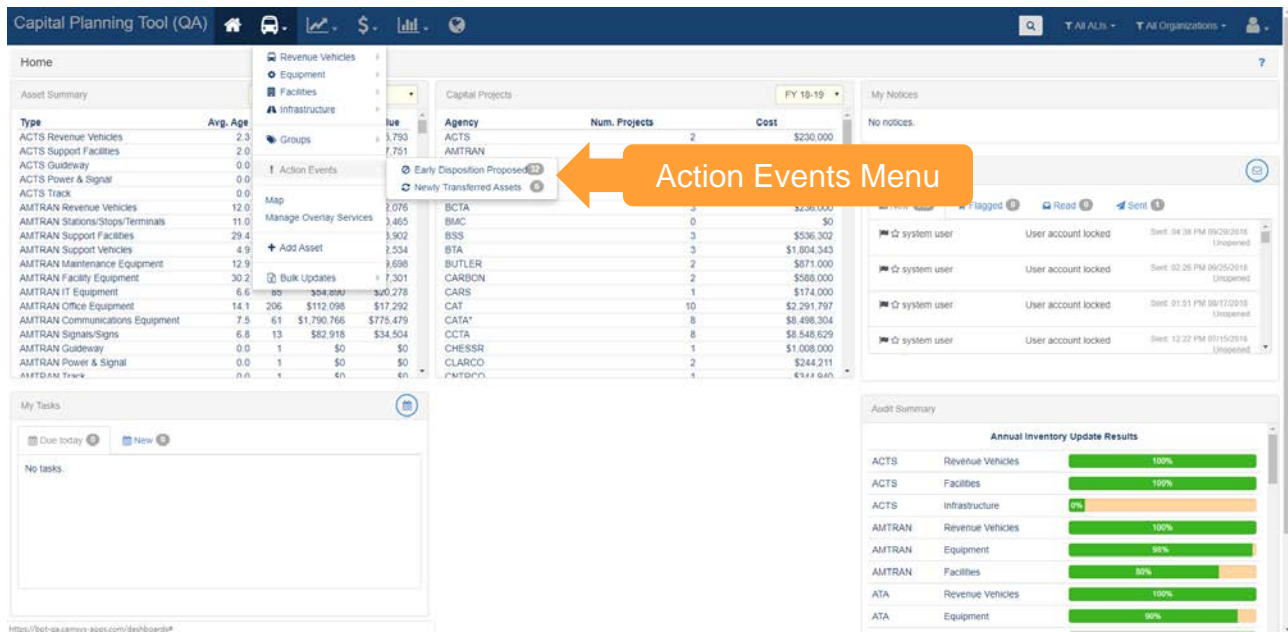
Figure 37 Updating the Lifecycle of an Existing Asset



4.5 Action Events (Disposition and Transfer Review)

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

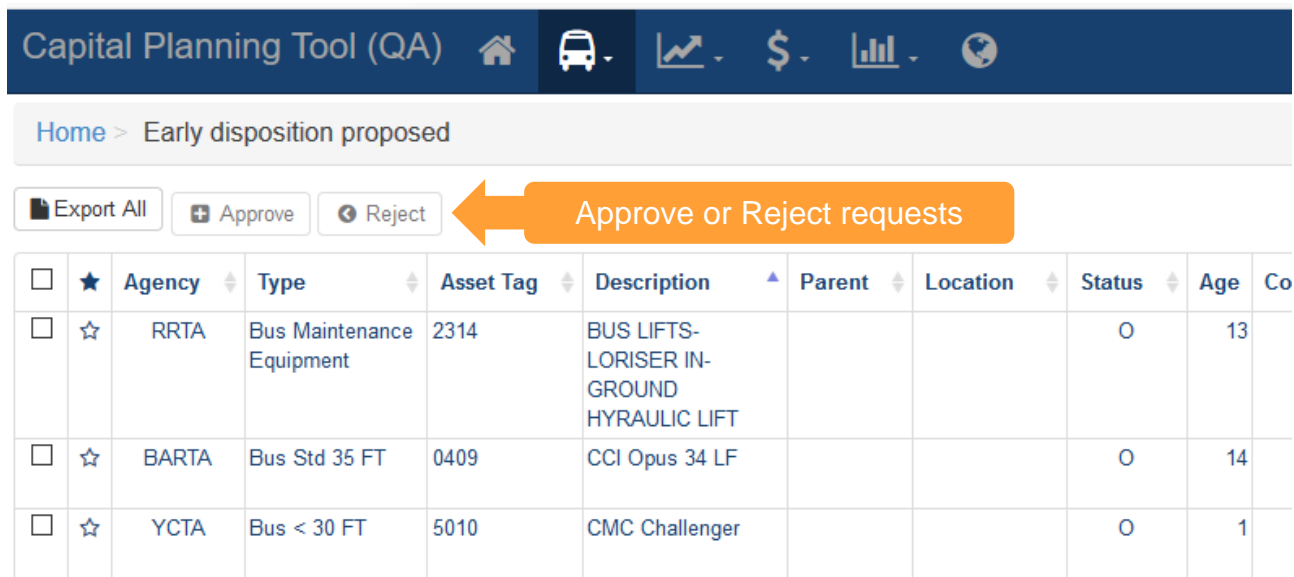
Action Events depend on the disposition of an asset to perform certain functions. The available functions will vary depending on individual permissions and organizational policy. Action Events occur when an asset is proposed for an early disposition or an asset is newly transferred. You can submit a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

Figure 38 Asset Action Events (Disposition and Transfer)


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

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

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

Figure 39 Early Disposition Requests


4.6 Adding or Updating Assets by Bulk Update








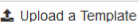

Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be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

Figure 40 Bulk Updates



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

Figure 41 Bulk Update Tools

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

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

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

Figure 45 Bulk Update Upload

Capital Planning Tool (QA)

Home > Bulk Updates > New Template

Bulk Updates

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

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

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

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

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

Spreadsheet

Spreadsheet Content

Inventory Updates

Organization

CATA*-Centre Area Transportation Authority

Spreadsheet

Browse... cata_transit_inventory_updates_file_handler_2018-06-13.xlsx

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

Upload spreadsheet

Select the parameters again and upload spreadsheet

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

Figure 46 Bulk Upload Processing

Capital Planning Tool (QA)

Home > Bulk Updates

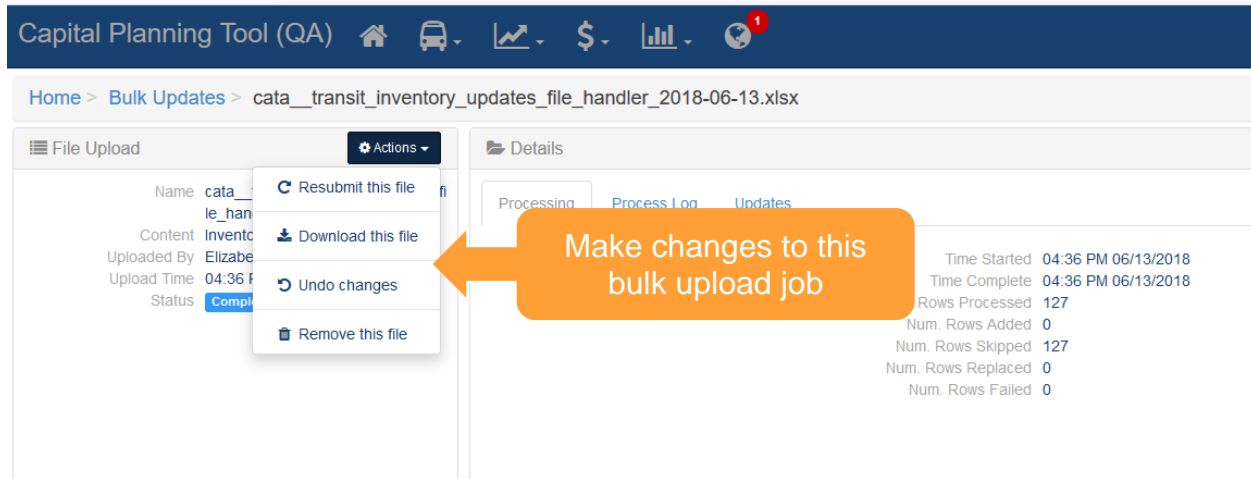
File was successfully uploaded.

Create a new Template Upload a Template Filter Status

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

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

Figure 47 Bulk Update Edit



4.7 Map

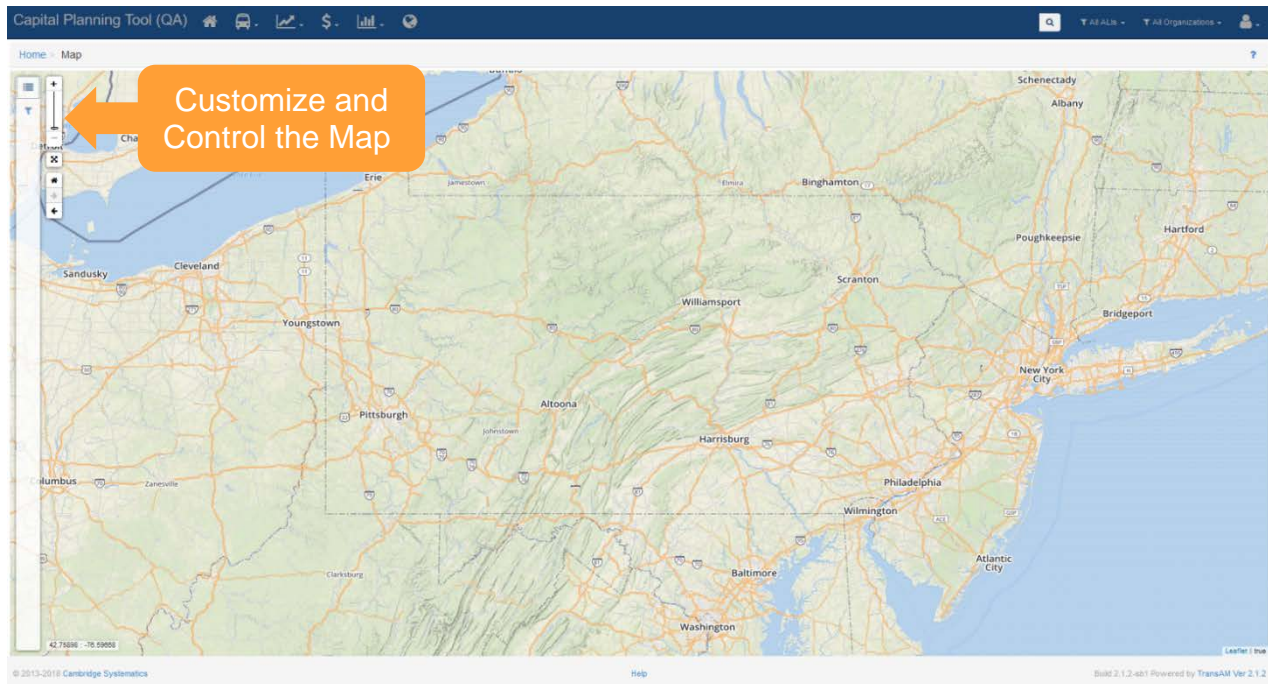
The system provides the ability to overlay asset locations on a map.

Figure 48 Asset Map



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

Figure 49 Map Customization



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

Figure 50 Map Layers



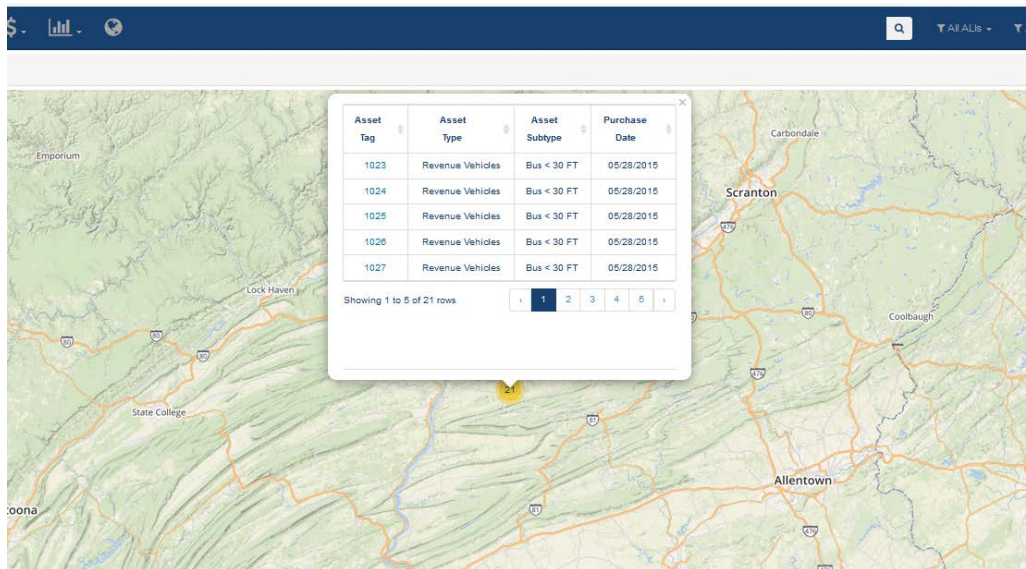
Clicking the filter icon will allow you to pare down the assets that are displayed on the map.

Figure 51 Map Filter



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

Figure 52 Map Asset Details



4.8 Groups

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

Figure 53 Asset Groups



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

Figure 54 Adding an Asset to a Group

The screenshot displays the 'Capital Planning Tool (QA)' interface. The breadcrumb trail indicates the path: Home > Revenue Vehicles > Buses (Rubber Tire Vehicles) > 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 the title is a 'Highlights' section with tabs for History, Tasks, Comments, Documents, Photos, Charts, Asset Values, Capital Projects, and Audit Results. An 'Actions' menu is visible on the right, containing options: Update, Edit, Add to group, Make a copy, Record final disposition, and Remove this asset. An orange arrow points to the 'Add to group' option.

The 'Event' table shows the following data:

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.

The 'Asset Summary' section on the left provides details for the asset:

- Owner: CAT
- Description: GIL 35' Low Floor
- Asset Tag: #1701
- External ID: GIL
- Manufacturer: GIL
- Class: Revenue Vehicles
- Type: Bus 35d 35 FT
- Status: In Service
- Age: 0 yrs
- Mileage: 15,000

The 'Profile' section on the right shows the 'Identification & Classification' tab, which includes the 'Vehicle Identification Number (VIN)' 15GGB2713H3189913, the 'Asset ID' #1701, and the 'External ID' NTD ID.

5.0 Policies

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

Figure 55 Policies Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The 'Policies' dropdown menu is open, showing the following options: Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. An orange arrow points to the 'Policies' option in the dropdown. The main content area displays a table of Asset Summary with columns for Type, Avg. Age, Count, and Cost. The table lists various asset types such as ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, AMTRAN Stations/Stops/Terminals, AMTRAN Support Facilities, AMTRAN Support Vehicles, AMTRAN Maintenance Equipment, AMTRAN Facility Equipment, AMTRAN IT Equipment, AMTRAN Office Equipment, AMTRAN Communications Equipment, AMTRAN Signals/Signs, and ATA Revenue Vehicles. The table also includes a 'Num. Projects' column and a 'Cost' column. The bottom of the screen shows a 'My Tasks' section with a calendar icon.

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

Figure 56 Policy Rule Sets

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The 'Policies' dropdown menu is open, showing the following options: Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. An orange arrow points to the 'Policies' option in the dropdown. The main content area displays a table of Asset Summary with columns for Type, Avg. Age, Count, and Cost. The table lists various asset types such as ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, AMTRAN Stations/Stops/Terminals, AMTRAN Support Facilities, AMTRAN Support Vehicles, AMTRAN Maintenance Equipment, AMTRAN Facility Equipment, AMTRAN IT Equipment, AMTRAN Office Equipment, AMTRAN Communications Equipment, AMTRAN Signals/Signs, and ATA Revenue Vehicles. The table also includes a 'Num. Projects' column and a 'Cost' column. The bottom of the screen shows a 'My Tasks' section with a calendar icon.

5.1 Asset Replacement/Rehabilitation Policy

Asset Replacement and Rehabilitation Policies can be chosen under the Policies submenu. The SOGR Capital Project Analyzer, Capital Projects, and Project Planner tools apply this policy to determine the estimated service life, replacement cost, and depreciation of an asset. Asset Replacement/Rehabilitation

Policy Rules here can be set at the State or individual organization level. This type of policy set will persist from year to year, unless edited or removed.

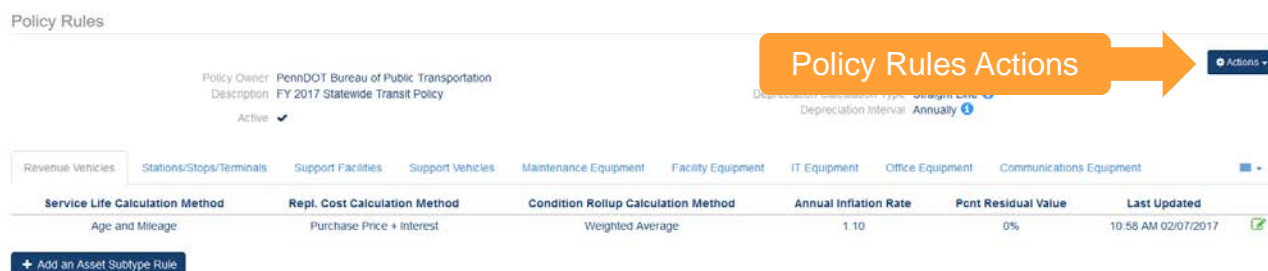
Figure 57 Asset Replacement/Rehabilitation Policy

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

Figure 58 Asset Replacement/Rehabilitation Policy Filters

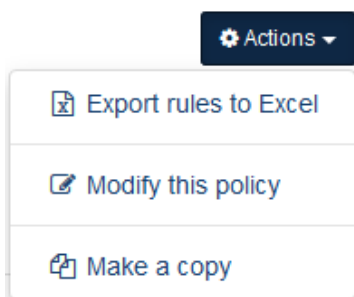
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 59 Policy Rules



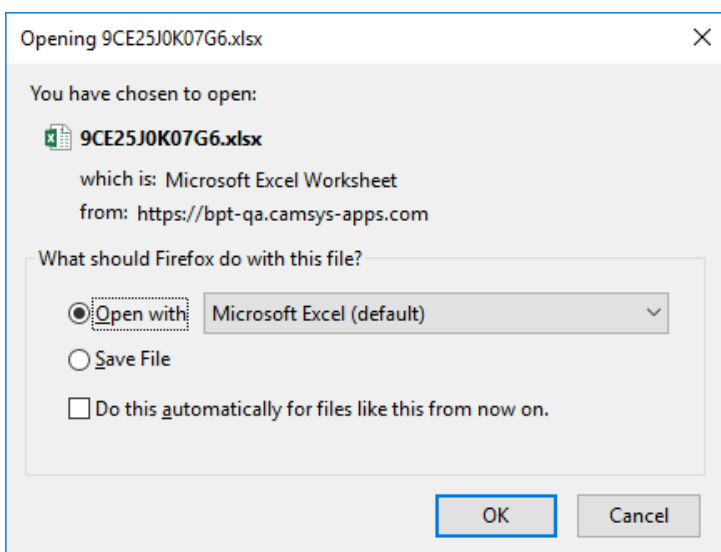
The Actions button will display a list of options as shown.

Figure 60 Policy Rules Actions Dropdown



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

Figure 61 Export rules to Excel (Windows dialog box)



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

Figure 62 Modify (Update) Organization Policy Dialog

Update Policy

Description
FY 2017 Statewide Transit Policy

Condition Threshold
2.5

Depreciation Calculator
Straight Line

Depreciation Interval
Annually

Update Policy

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 63 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 64 Asset Types

Revenue Vehicles

Stations/Stops/Terminals

Support Facilities

Support Vehicles

Maintenance Equipment

Facility Equipment

IT Equipment

Office Equipment

Communications Equipment

Service Life Calculation Method

Age and Mileage

Repl. Cost Calculation Method

Purchase Price + Interest

Condition Rollup Calculation Method

Weighted Average

Annual Inflation Rate

1.10

Pcnt Residual Value

0%

Last Updated

10:58 AM 02/07/2017

+ Add an Asset Subtype Rule

Asset Types

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

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

Figure 65 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 66 Asset Type Rules

Revenue Vehicles

Stations/Stops/Terminals

Support Facilities

Support Vehicles

Maintenance Equipment

Facility Equipment

IT Equipment

Office Equipment

Communications Equipment

Service Life Calculation Method

Age and Mileage

Repl. Cost Calculation Method

Purchase Price + Interest

Condition Rollup Calculation Method

Weighted Average

Annual Inflation Rate

1.10

Pcnt Residual Value

0%

Last Updated

10:58 AM 02/07/2017

+ Add an Asset Subtype Rule

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

Asset Type Rules

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

Figure 67 Edit Icon



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

Figure 68 Modify Asset Policy Rule

Modify Rule: IT Equipment X

*** Service Life Calculation Type**

Age Only

*** Replacement Cost Calculation Type**

Purchase Price + Interest

Condition Rollup Calculation Type

Weighted Average

*** Annual Inflation Rate**

1.1

*** Pcnt Residual Value**

0

*** Condition Rollup Weight**

0

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 69 Asset Type and Asset Subtype rules

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

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

Figure 70 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade ✕

Replacement

* ESL (Mo) 1200	* Replacement Cost \$ 0	* Cost FY FY 18-19	<input checked="" type="checkbox"/> Replace With New <input type="checkbox"/> Replace With Leased
* ESL Used (Mo) 0	Lease Length Months 0		
* Purchase Replacement Code 12.22.06	* Lease Replacement Code 12.26.06		
* Engineering Design Code 12.21.06	* Construction Code 12.23.06	* Rehabilitation Code 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 71 Remove Asset Subtype Rule

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

Cancel Yes

5.2 TAM Policy

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

Figure 72 TAM Policy Dropdown Menu Selection

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Policies, Finance, and Reports. The 'Policies' dropdown menu is open, showing options: Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. The 'TAM Policy' option is highlighted with an orange arrow and the text 'TAM Policy Selection'. Below the dropdown, a table displays asset categories and their associated costs.

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

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 73 TAM Policy Performance Measures

The screenshot shows the Capital Planning Tool (QA) interface with the 'Performance Measures' tab selected. The breadcrumb navigation shows 'Home > Policies > TAM Policy > Performance Measures'. The 'Performance Measures' tab is highlighted with an orange arrow and the text 'Performance Measures'. Below the tabs, there are filters for Policy Year (2021), Period (July - June), Group Name, and Organization. A 'View' button is present. The main content area displays the message: '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 74 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 75 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 76 Activate Performance Measures

TAM Policy

Group Management Group Metrics Performance Measures

Filters

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

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

Asset Category: Facilities Group Name: New Group Agency Status: Pending Activation

Facilities

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

Activate Button

6.0 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 77 Capital Projects Table

Capital Projects

Plan Summary

Capital Needs Chart

FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
\$966,840,985	\$333,276,552	\$108,838,201	\$78,408,870	\$125,370,978	\$179,853,327	\$188,491,652	\$100,343,480	\$266,308,134	\$169,519,292	\$406,353,547	\$180,491,802

+ New Capital Project

Agency

FY

Project

Scope

Emgcy

SOGR

Shadow

Multi Year

Type

Title

Cost

State

Federal

Local

Total

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

Manually create a new capital project

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

Figure 78 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 79 Capital Project Details

Capital Planning Tool (QA)

Home > Capital Projects > AMTRAN 18-19 #6087

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

test

Project Number AMTRAN 18-19 #6087
Fiscal Year FY 18-19
Scope 125
Total Cost \$0

Type Replacement
SOG No
Shadow No
Multi year No
Emergency No

Description Activity Line Items 0 Supporting Documents 0 Comments 0

Project Description

Project Justification

Project Locations Senate District 30 (Senate)

Edit Capital Project Details

Capital Project Additional Details

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

Figure 80 Add an ALI

The screenshot shows the 'Capital Planning Tool (QA)' interface. At the top, there's a navigation bar with icons for home, bus, line graph, dollar sign, bar chart, and globe. Below it, a breadcrumb trail reads 'Home > Capital Projects > AMTRAN 18-19 #6126'. A green message bar states 'Capital Project AMTRAN 18-19 #6126 was successfully created.' Below this, a 'Manual Capital Project' section displays project details: Project Number AMTRAN 18-19 #6126, Fiscal Year FY 18-19, Scope 111, and Total Cost \$0. To the right, there are tabs for 'Description', 'Activity Line Items' (with a count of 0), 'Supporting Documents' (with a count of 0), and 'Comments' (with a count of 0). Under the 'Activity Line Items' tab, it says 'There are no activity line items for this project.' and features a '+ Add Line Item' button. An orange arrow points from the text 'Add an ALI' to this button.

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

Figure 81 Add an ALI Details

The screenshot shows the 'AMTRAN 18-19 #6126: New Activity Line Item' dialog box. It contains several fields for specifying ALI details:

- * Category: Select...
- * TEAM ALI Code: Select...
- * Cost Estimate: \$
- * Fiscal Year: FY 18-19
- * Replace with New: Radio buttons for Yes and No.
- * Count: Input field.
- * Fuel Type: Select...
- * Length: Input field.
- * Name: Input field.

 At the bottom, there are 'Create Activity Line Item' and 'Cancel' buttons. The background shows the same project details as Figure 80, with the '+ Add Line Item' button visible.

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

7.0 Project Planning

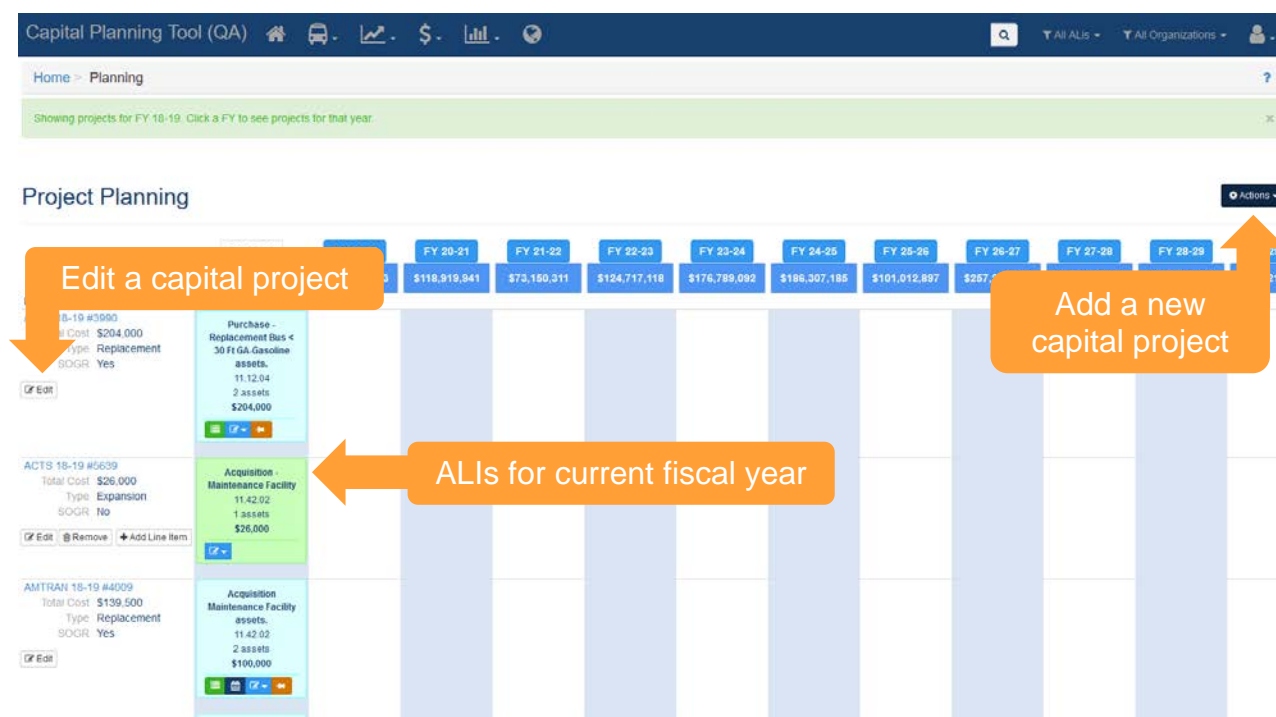
7.1 Project Planner

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

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

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

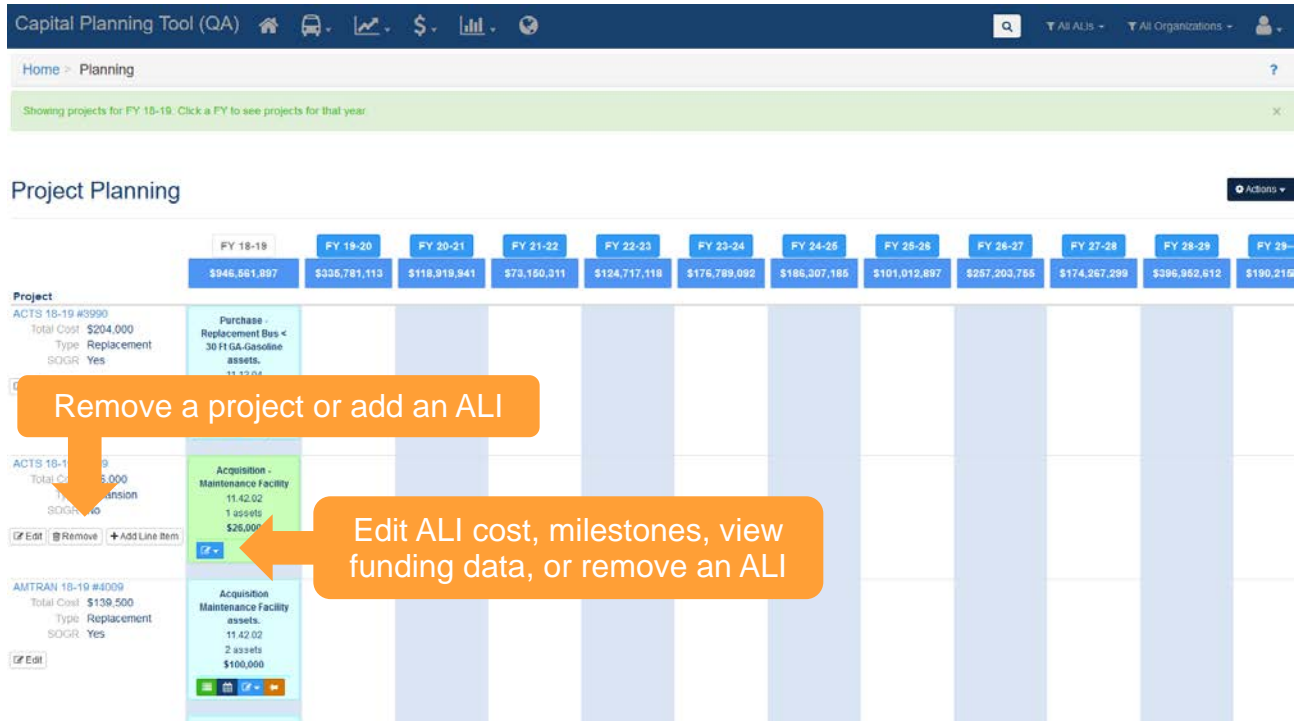
Figure 82 Project Planner Interface



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

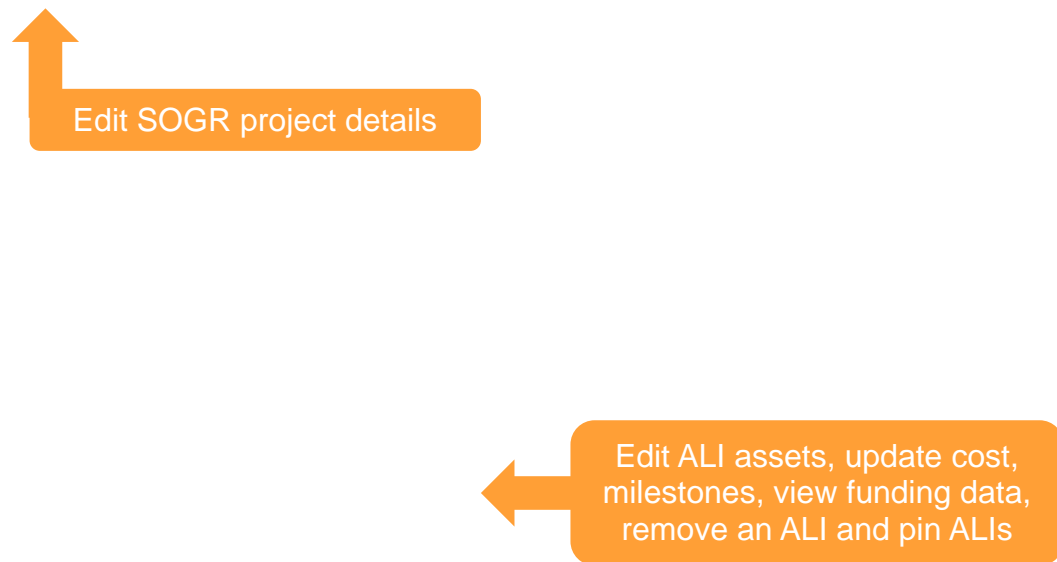
Manually created capital projects can be removed completely and can have additional ALIs added. These actions can be completed by clicking on the “Remove” button or the Add Line Item button on the left-hand side of the planner. ALI details can be viewed or edited by clicking on the icons within each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

Figure 83 Edit Manually Created Capital Projects



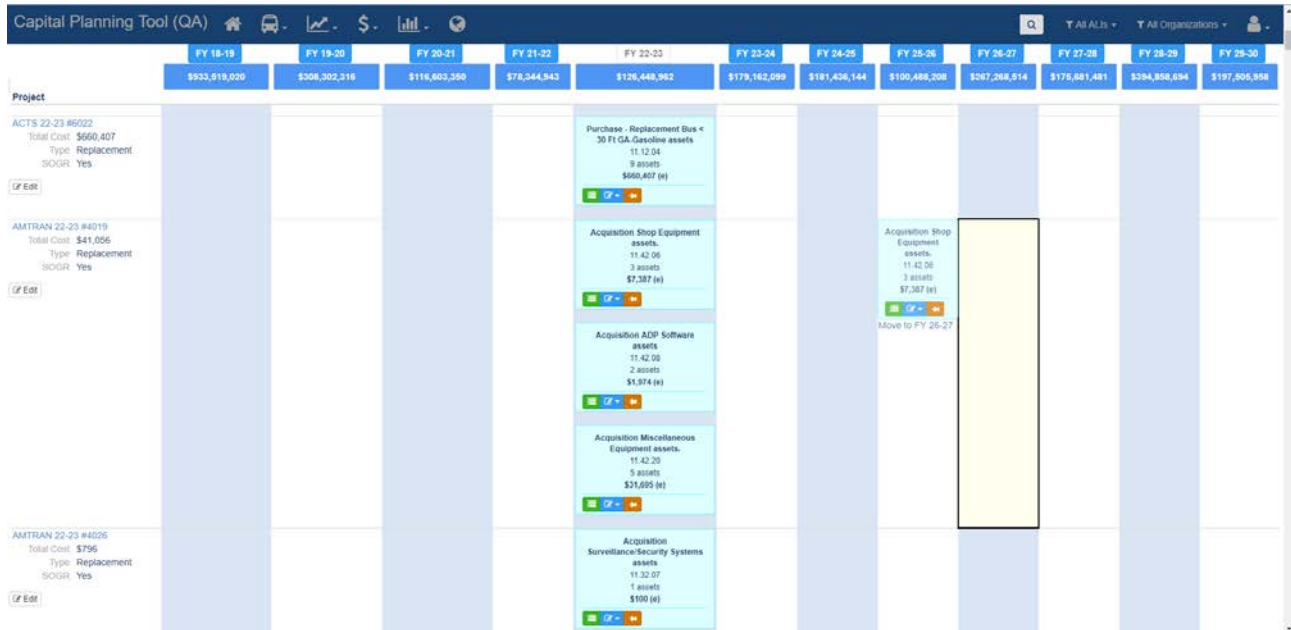
SOGR projects and ALIs include buttons and icons providing users the ability to view assets associated with the SOGR projects, remove the assets from the ALI or move the associated assets to a different year, edit cost, update milestones, view funding information and pin an ALI to the project planner.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

Figure 84 **Edit SOGR Capital Projects**



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

Figure 85 **Prioritize Projects**
Move ALIs to Different Years



7.2 State of Good Repair (SOGR) Capital Project Analyzer

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

Figure 86 Running SOGR Capital Project Analyzer

ct Analyzer

SOGR Capital Project Analyzer

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

- Description of the project
- Justification for the project

* Organization

* Fta Asset Categories

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

* Starting Fiscal Year

Run analyzer...

Run Analyzer

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

Figure 87 SOGR Capital Project Analyzer Processing

Capital Planning Tool (QA)

Home > Capital Projects

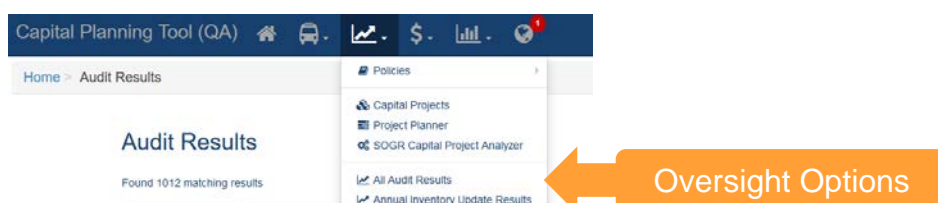
SOGR Capital Project Analyzer is running. You will be notified when the process is complete.

8.0 Oversight

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

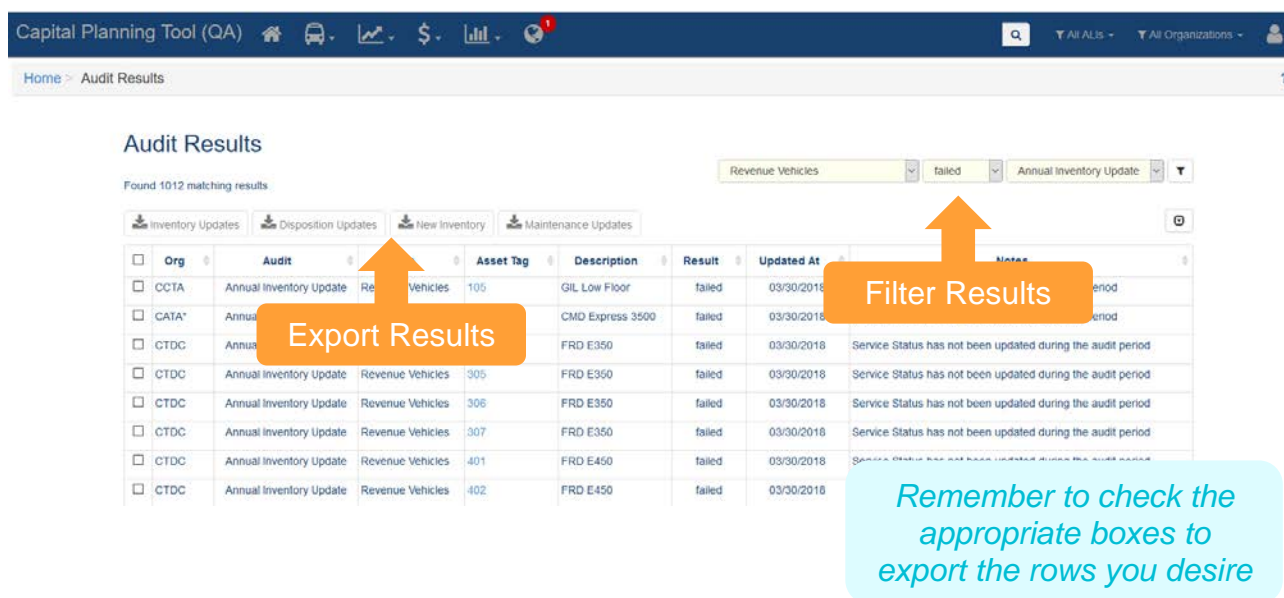
Clicking “All Audit Results” or “Annual Inventory Update Results” will bring you to an overview of the audit process.

Figure 88 Oversight Options



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

Figure 89 Audit Results



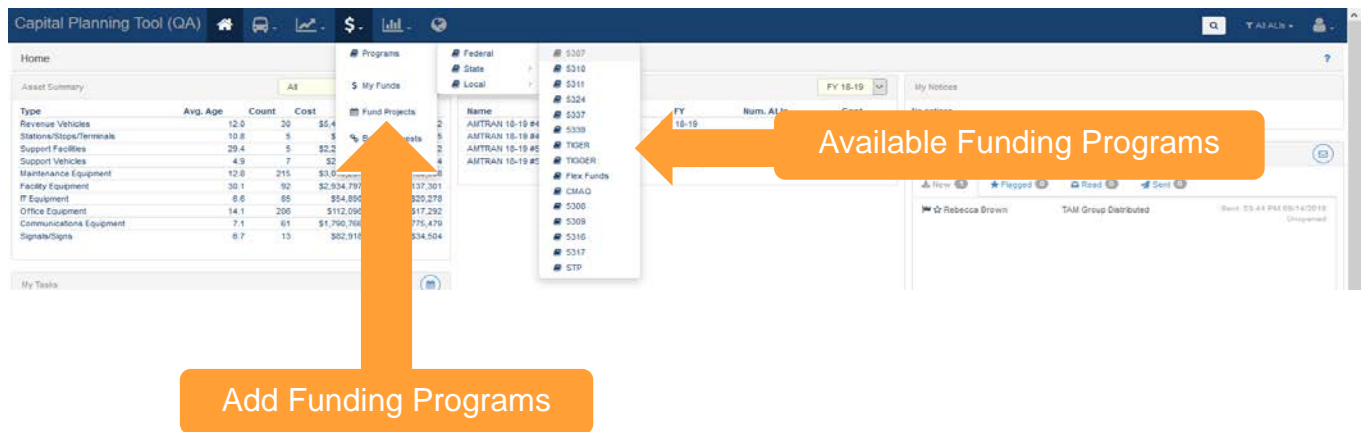
9.0 Funding

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

9.1 Programs

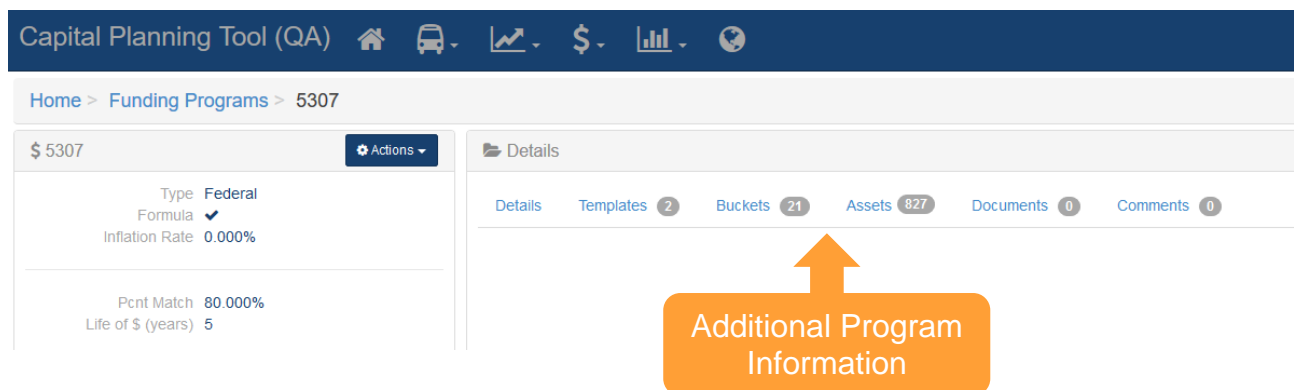
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

Figure 90 Available Funding Programs



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

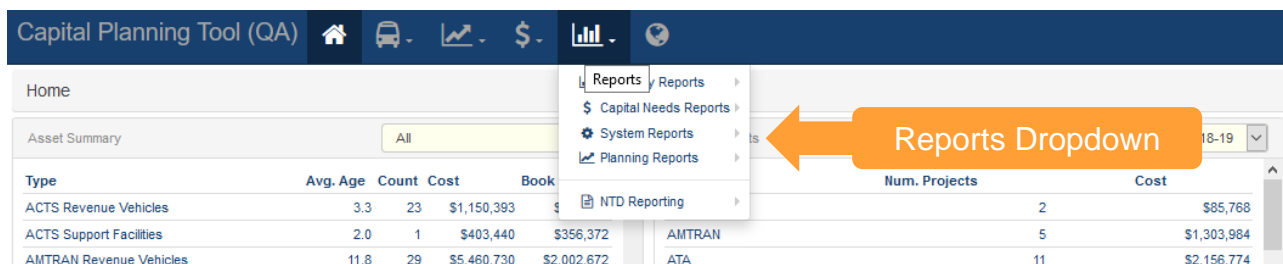
Figure 91 Funding Program Details



10.0 Reports

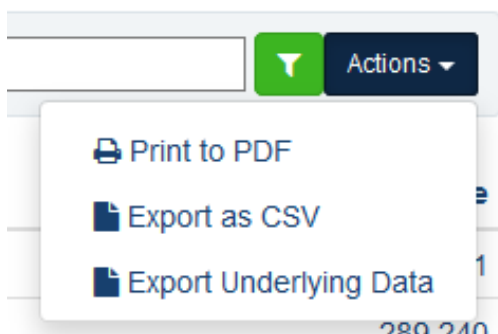
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 92 Reports Dropdown



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

Figure 93 Report Exports

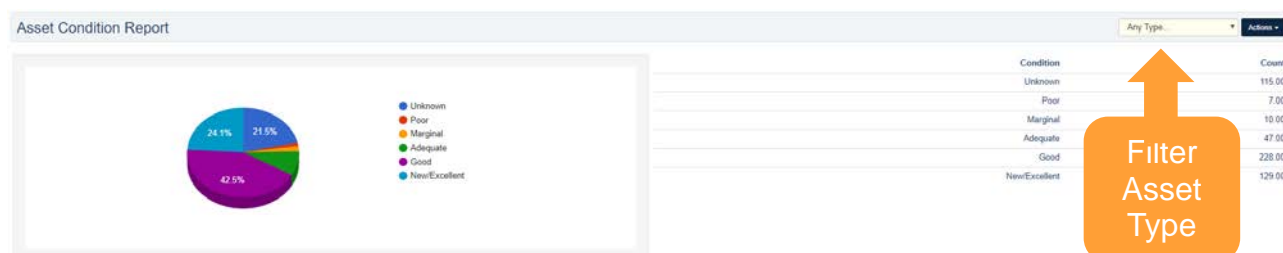


10.1 Inventory Reports

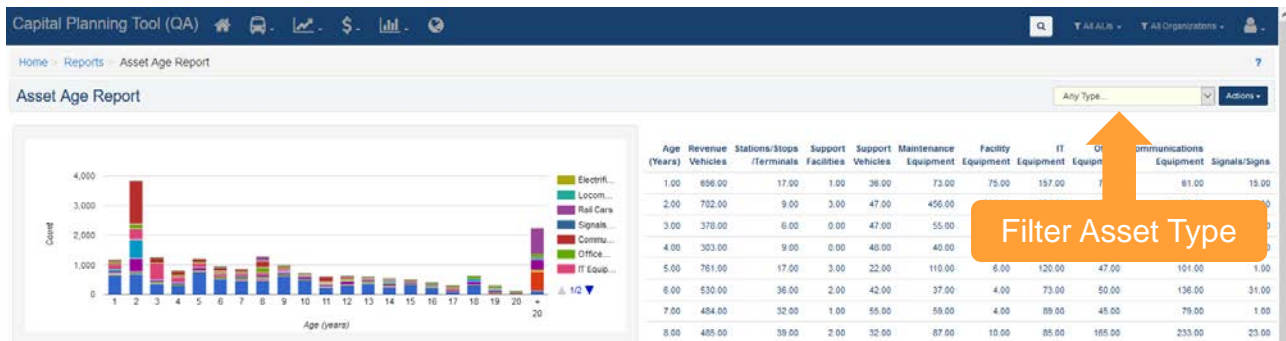
Inventory reports are a rollup of asset inventory data, including age, condition, and funding related calculations.

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

Figure 94 Asset Condition Report



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

Figure 95 Asset Age Report

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

- Agency, Funding Program.
- Agency, Funding Program, Fiscal Year.
- Funding Program, Agency.
- Funding Program, Agency, Fiscal Year.
- Funding Program, Fiscal Year.
- Funding Program, FY, Agency.
- FY, Funding Program.
- FY, Funding Program, Agency.

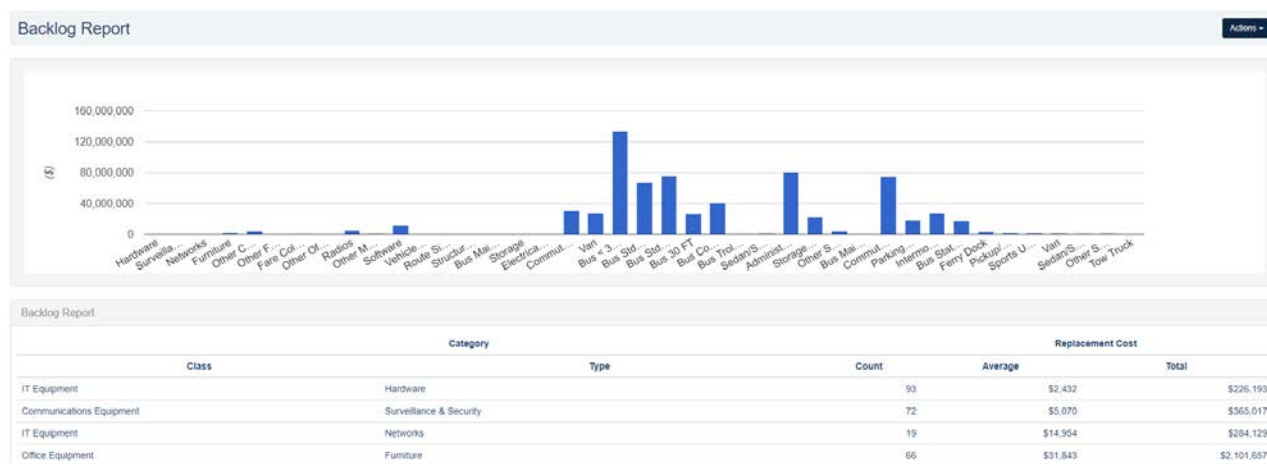
Figure 96 Asset Funding Source Report

10.2 Capital Needs Reports

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

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

Figure 97 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 98 Unconstrained Capital Projects Report




10.3 Planning Reports


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


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


Figure 99 Vehicle Replacement Report


Capital Planning Tool (QA)


















All ALJs

All Organizations



Home > Reports > Vehicle Replacement Report

Vehicle Replacement Report

Jump to...

FY 18-19

Actions


All Transit Operators


Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 18-19	Revenue Vehicles	Bus < 30 FT	472	\$3,881,401	\$34,064,976
FY 18-19	Revenue Vehicles	Bus 30 FT	18	\$972,478	\$4,068,775
FY 18-19	Revenue Vehicles	Van	189	\$332,474	\$7,668,659
FY 18-19	Revenue Vehicles	Sedan/Station Wagon	75	\$72,267	\$1,222,056
FY 18-19	Revenue Vehicles	Bus Std 35 FT	34	\$973,510	\$7,994,757
FY 18-19	Revenue Vehicles	Bus Std 40 FT	394	\$2,909,526	\$42,884,133
Totals for FY 18-19			1,182	\$9,141,656	\$97,923,366


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


Figure 100 State of Good Repair Report


Capital Planning Tool (QA)















Q

All ALJs

All Organizations

364



Home > Reports > State of Good Repair Report

State of Good Repair Report

Jump to...

Actions


State of Good Repair: All Transit Agencies


Type	Sub Type	Count	Book Value	Replacement Cost
Revenue Vehicles	Bus Std 35 FT	27	\$2,212,738	\$5,739,747
Revenue Vehicles	Bus 30 FT	9	\$346,100	\$2,778,851
Stations/Stops/Terminals	Intermodal Terminal	74	\$19,143,700	\$27,574,657
Stations/Stops/Terminals	Parking Lot	2	\$11,687	\$68,854
Support Facilities	Bus Maintenance Facility	3	\$0	\$1,263,373
Support Facilities	Other Support Facility	2	\$1,108,902	\$2,000,520
Support Vehicles	Van	1	\$6,721	\$23,167
Support Vehicles	Sedan/Station Wagon	8	\$80,472	\$233,815
Support Vehicles	Pickup Truck	2	\$12,552	\$99,178


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


Figure 101 Disposition Report


Capital Planning Tool (QA)















Q

▼ All ALJs

▼ All Organizations

584



Home > Reports > Disposition Report

?

Disposition Report

Jump to...

FY 17-18

Actions

All Transit Operators

Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 17-18	Revenue Vehicles	Bus Std 35 FT	18	\$466,409	\$2,943,866
FY 17-18	Revenue Vehicles	Bus 30 FT	7	\$302,308	\$2,166,361
FY 17-18	Maintenance Equipment	Bus Maintenance Equipment	73	\$217,175	\$2,454,801
FY 17-18	Revenue Vehicles	Bus < 30 FT	20	\$57,253	\$1,335,937
FY 17-18	Revenue Vehicles	Bus Commuter/Suburban	6	\$736,860	\$4,493,528
FY 17-18	IT Equipment	Hardware	1	\$0	\$4,591
FY 17-18	Office Equipment	Other Office Equipment	1	\$0	\$5,399
FY 17-18	Revenue Vehicles	Van	4	\$0	\$67,021
Totals for FY 17-18			132	\$1,782,025	\$13,471,504

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

Figure 102 Asset Service Life Summary Report

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

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

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

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

Figure 103 TAM Service Life Summary Report

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

11.0 Specialized Reports

11.1 Asset Fleet Builder

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

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

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

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

Figure 104 Asset Fleet Builder

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

Build Revenue or Support Fleets

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

Build Revenue Vehicles Fleets

Build Support Vehicles Fleets

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

Figure 105 Asset Fleet Builder—Orphaned Assets

Capital Planning Tool (QA)

Fleets

Revenue Vehicles Support Vehicles **Manage Fleets**

Orphaned Assets

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

Agency	Asset Type	Tag	PU	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGB2713H3189913	-	GIL-Gill Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	+ Add to Fleet
CAT	Revenue Vehicles	#271	PT Bus #271	1FDFE4FS6HDC18987	-	FRD-Ford Motor Corporation	Champion				In Service	+ Add to Fleet
CAT	Revenue Vehicles	#272	PT Bus #272	1FDFE4FS8HDC18988	-	FRD-Ford Motor Corporation	Champion				In Service	+ Add to Fleet
CAT	Revenue Vehicles	#273	PT Bus #273	1FDFE4FSXHDC18992	-	FRD-Ford Motor Corporation	Champion	2017	Bus < 30 FT	CU-Cutaway	In Service	+ Add to Fleet

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

Figure 106 Adding an Orphaned Asset to a Fleet

Orphaned Asset

Add to Existing Fleet

There are no fleets in the system that match this asset










Create New Fleet

Click Save to create a new fleet based on this vehicle

Save Cancel

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

Figure 107 Adding a New Fleet

Capital Planning Tool (QA)         All ALIs All Organizations 

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

Asset fleet was successfully created.

Fleets

CAT : MB DO : GIL : 2017

Organization CAT
NTD ID
Agency Fleet ID

Actions

- Update this fleet
- Remove this fleet

Details

Basic Information Vehicle Information Mileage Information Assets 1

Figure 108 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 109 Update Odometer Readings

Capital Planning Tool (QA)         All ALIs All Organizations 164 

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

Fleets





AMTRAN : MB DO : GIL : 2001

Organization AMTRAN
NTD ID
Agency Fleet ID

Details

Basic Information Vehicle Information Mileage Information Assets 2

Miles This Year 17-18
Avg Lifetime Miles per Active Vehicle

Asset Tag	External ID	VIN	License Plate	Odometer Reading FY Start	Odometer Reading FY End	Mileage During FY	Last Odometer Value	Last Odometer Date
066560		15GG8221011072394					345,025	11/30/2017
066561		15GG8221311072406					35,366	11/30/2017

Showing 1 to 2 of 2 rows

Figure 110 Remove or Add Assets from within a Fleet

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

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

Showing 1 to 2 of 2 rows

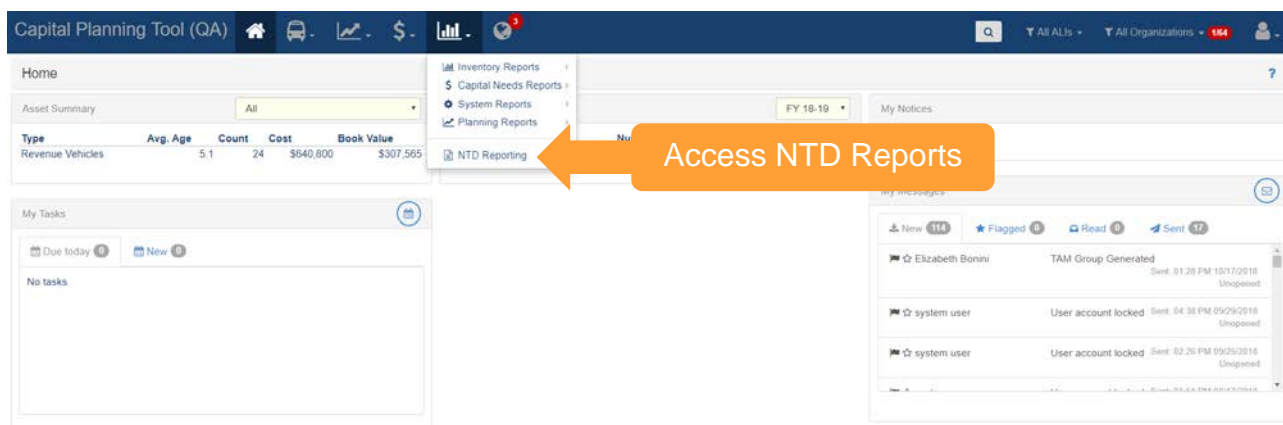
11.2 NTD Asset Reports

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

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

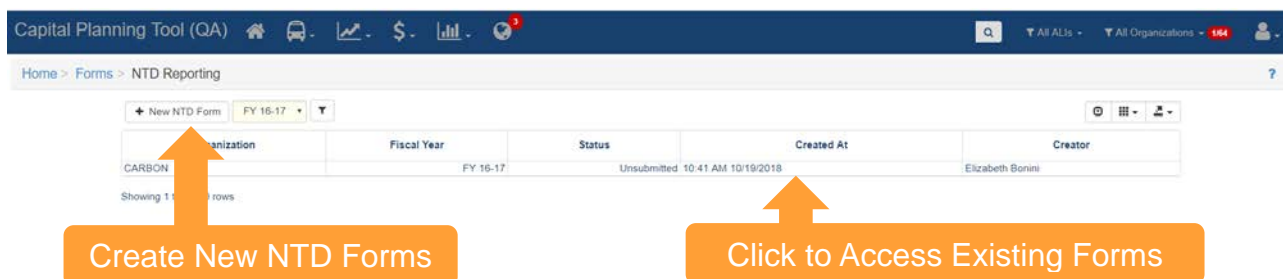
Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

Figure 111 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 112 Table of Previously Generated NTD Reports



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

Figure 113 Create New Reporting Year Forms

Capital Planning Tool (QA)

Home > Forms > NTD Reporting > New

New NTD Report

Organization: BUTLER-Butler County Community Public Transportation

Fiscal Year: FY 2016 - 2017

Agency Information

Reporter Name: Elizabeth Bonini

Reporter Title:

Reporter Department:

Reporter Email: ebonini@pa.gov

Reporter Phone: 999999999 Reporter Phone Ext:

Save NTD Form

Click Save NTD Form Button

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Figure 114 NTD Report Details and Data

Capital Planning Tool (QA)

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

CARBON FY 16-17

Organization: CARBON

Year: FY 16-17

Status: Unsubmitted

Last Updated: 10:41 AM

Reporter Name: Elizabeth Bonini

Reporter Title:

Reporter Department:

Reporter Email: ebonini@pa.gov

Reporter Phone: (999) 999-9999

Actions:

- submit this form
- New version
- Remove this form

Details

Versions History

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

Submit, Create a New Version, or Remove

Access Forms or Add a Comment

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

Figure 115 Download each NTD Form

