

## TransAM

*General User*

# User Guide

*prepared for*

**Orange County Department of Planning (OCDP)**

*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.

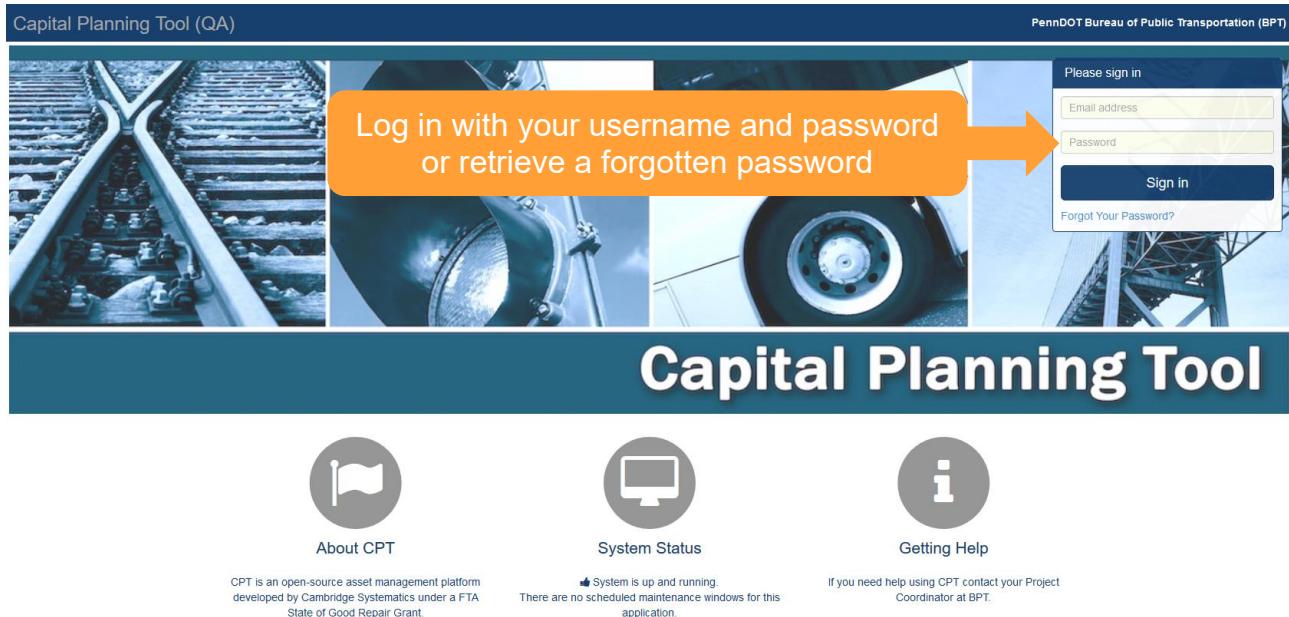
**Figure 2 Set/Reset Password Screen**

## 1.2 Ongoing Site Access

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

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

**Figure 3     Login Screen**



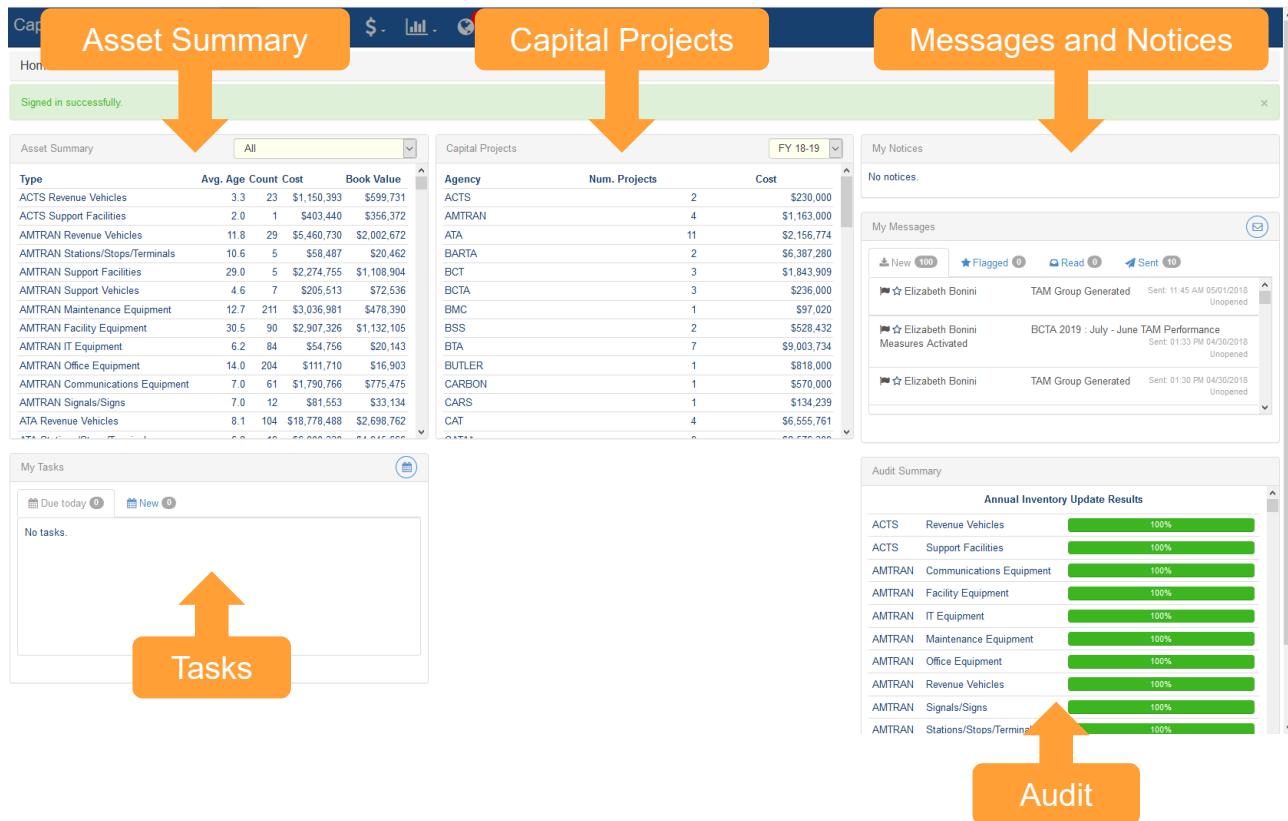
## 2.0 Dashboard

### 2.1 Dashboard Elements

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

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

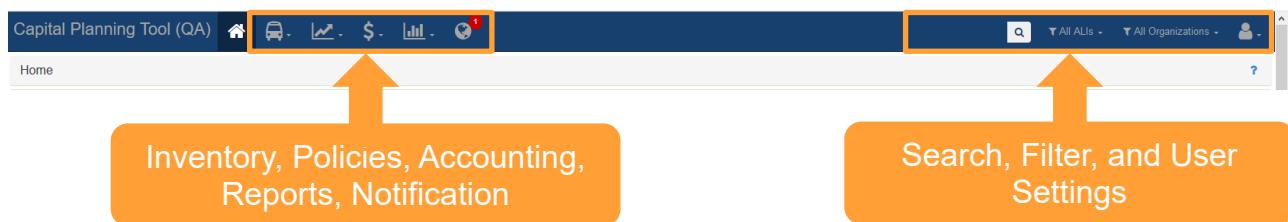
**Figure 4** Dashboard Elements



### 2.2 Header Menu and Controls

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

**Figure 5** Header Menu





## 3.0 General Features and Tools

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

### 3.1 Table Controls

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

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

**Figure 6 Sorting Controls**



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

**Figure 7 Export Button**



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

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

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

**Figure 8 Table Tools**



### 3.2 Site Filters

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

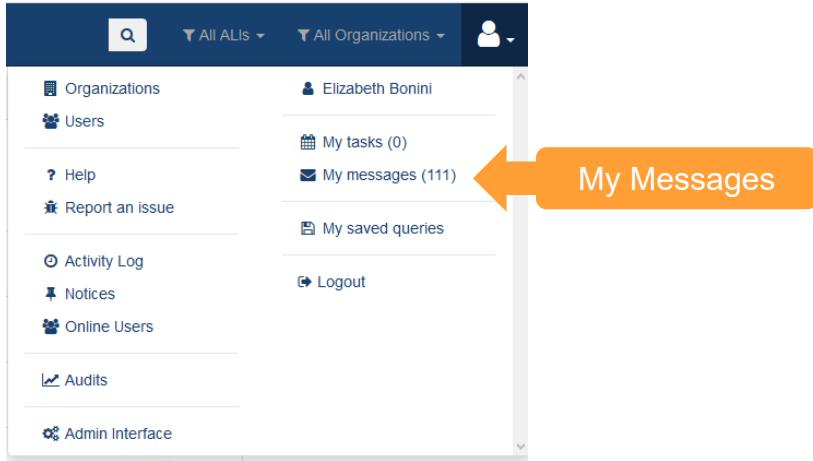
**Figure 9 Filter Icon**



### 3.3 Messages

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

**Figure 10 User Profile  
Messages**



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

**Figure 11 Messages**

The screenshot shows the Capital Planning Tool (QA) 'My Messages' page. At the top, there are navigation icons for Home, Bus, Charts, Dollars, and Bar Charts. Below that is a breadcrumb trail: Home > My Messages. The main area has a 'Compose' button and a 'New 111' button. 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 Unopened
system user	User account locked	07/15/2018 Unopened
system user	User account locked	07/15/2018 Unopened

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

**Figure 12 Message Interface**

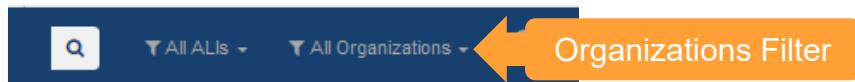
The screenshot shows the 'New Message' screen in the Capital Planning Tool (QA). At the top, there are navigation icons for Home, My Messages, and New. Below that is a search bar and a dropdown for 'All ALIs'. The main area is titled 'New Message' and contains fields for 'Users' (a dropdown menu showing 'BPT-PennDOT Bureau of Public Transportation' with names Nicholas Baldwin, Andrew Batson, Jack Birger, Elizabeth Bonini), 'Subject' (a text input field with placeholder 'Enter a brief summary...'), 'Priority' (a dropdown set to 'Normal'), and a rich text editor toolbar. A large orange arrow points from the right towards the bottom of the message body area. At the bottom left is a 'Send...' button.

The screenshot shows the 'ALI Filters' screen in the Capital Planning Tool (QA). At the top, there are navigation icons for Home, ALI Filters, and New. Below that is a search bar and dropdowns for 'All ALIs' and 'All Organizations'. The main area is divided into two sections: 'Details' on the left and 'Parameters' on the right. In the 'Details' section, there are fields for 'Name' (placeholder 'Enter a name for this filter') and 'Description' (placeholder 'Enter a description for this filter'). In the 'Parameters' section, there are dropdowns for 'Type', 'SOGR' (set to 'All'), 'Scope', 'Project Location', 'Asset Type', 'Asset Subtype', and 'Owner' (dropdown). There are also checkboxes for 'In Backlog', 'Funding' (dropdown), and 'Not fully funded'. At the bottom are buttons for 'Update ALI Filter' and 'Update and Select This Filter'. A large orange arrow points from the right towards the 'All Organizations' dropdown in the 'Parameters' section.

### 3.4 Organizations Filter

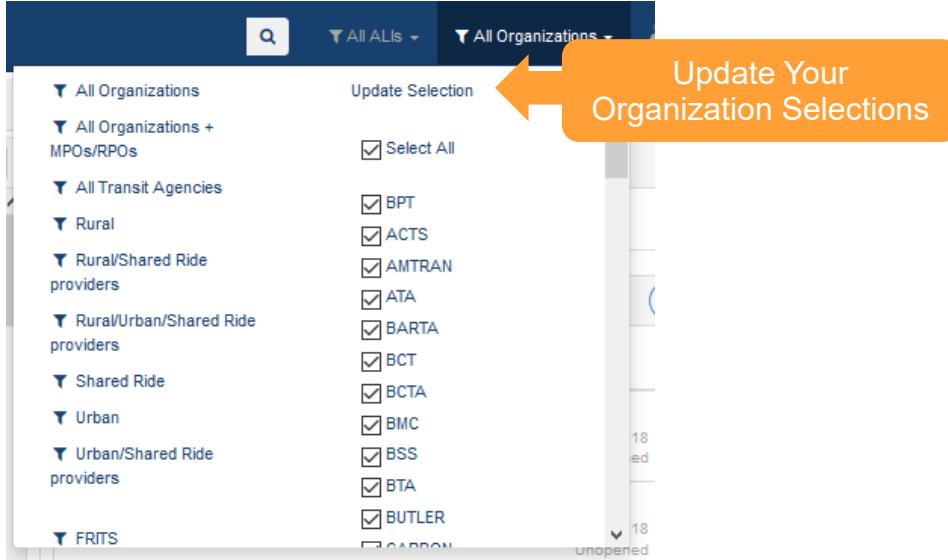
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

**Figure 13 Organization Filter**



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

**Figure 14 Organization Filter Selections**



### 3.5 Search

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

**Figure 15 Search Box**



### 3.6 User and Organization Options

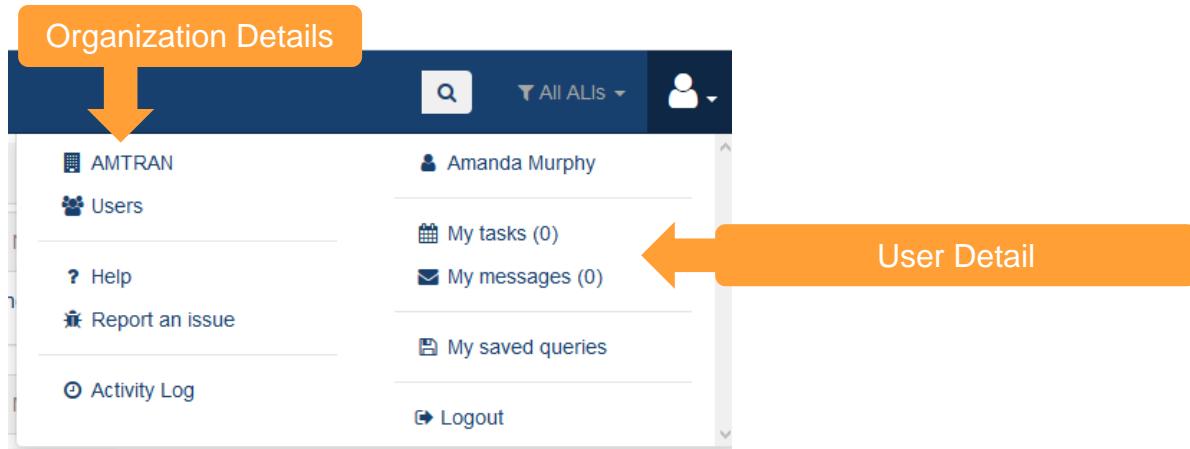
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

**Figure 16 User Menu**



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

**Figure 17 User Menu Dropdown**



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

**Figure 18 Organization Details**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Organizations, and AMTRAN. Below the navigation bar, the page title is 'Home > Organizations > Transit Operators > AMTRAN'. The main content area displays organization details for 'Altoona Metro Transit' (Type: Bus Std 35 FT). It includes fields for Name, Short Name, External ID, Address (3301 Fifth Avenue, Altoona, PA, 16601), Technical Contact (Not Set), and Subrecipient Number (XXXXXX). There is a checkbox labeled 'Update this organization' and a button labeled 'Add a user'. To the right of the organization details is a pie chart showing asset distribution by type. A large orange arrow points from the 'Edit Organization Details or Add Users' callout to the 'Add a user' button. Another orange arrow points from the 'Organization Details' callout to the 'Bus Std 35 FT' category in the pie chart.

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

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

**Figure 19 Profile Details**

Capital Planning Tool (QA) 1

Home > Users > My Profile

**Amanda Murphy**

**Actions**

- Assign myself a task
- Update my profile picture
- Update my settings
- Update my profile
- Change my password

Corporate System Settings

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

Email amandamurphy@amtran.org  
Primary Phone 999-9999  
Address PA  
Role Agency Manager  
Privileges

**Edit Profile Details**

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

**Figure 20 Report an Issue**

### Report an Issue

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

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

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

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

**\* Issue Type** **\* Web Browser Type**

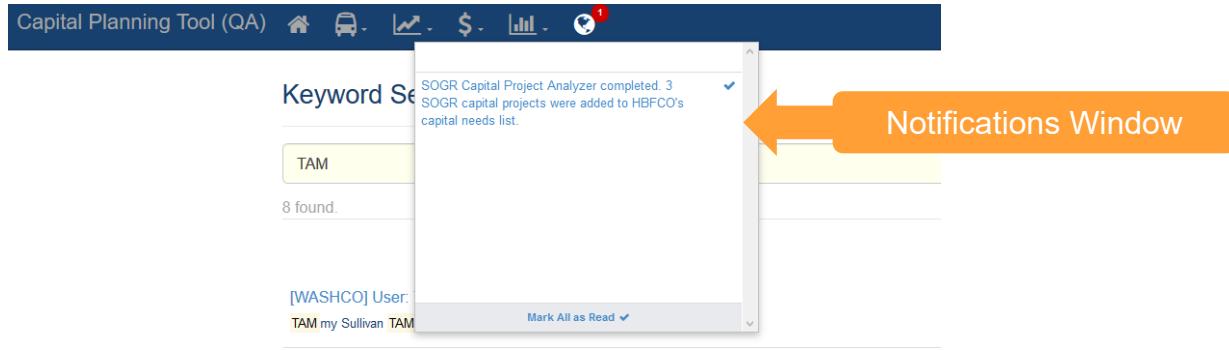
**\* Comments**

Please provide as much detail as you can...

**Create Issue**

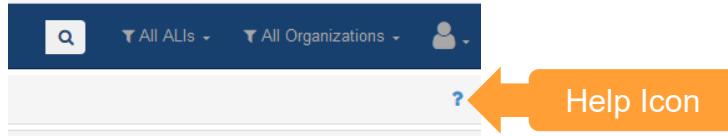
### 3.7 Notifications

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

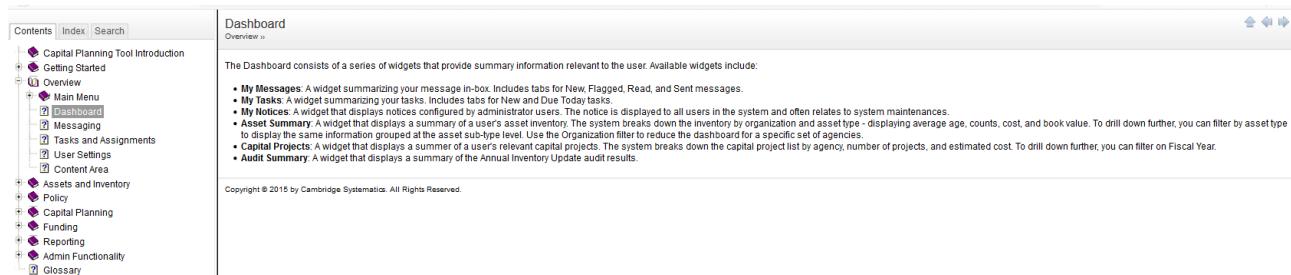
**Figure 21** Notification Drawer

### 3.8 Help

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

**Figure 22** Help Icon

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

**Figure 23** Help Content



## 4.0 Asset Inventory

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

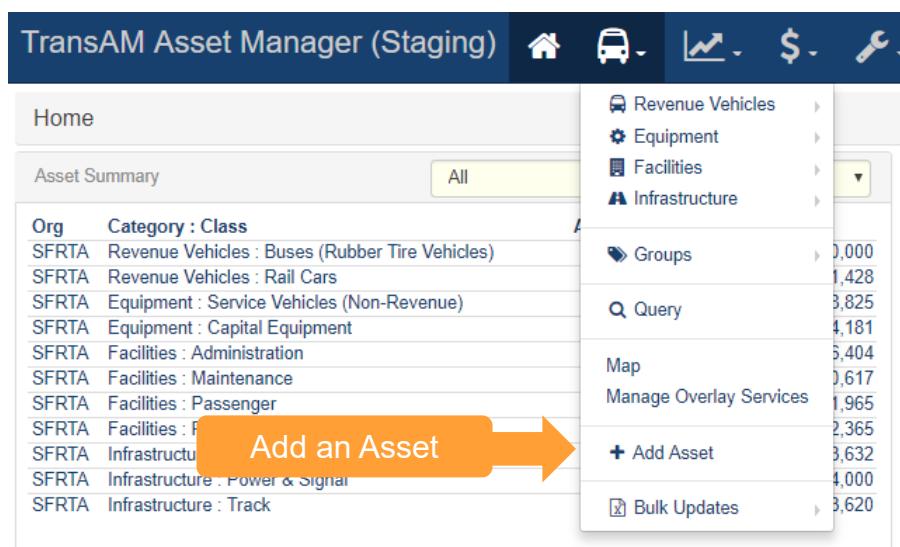
**Figure 24 Asset Inventory Dropdown**



### 4.1 Add an Asset

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

**Figure 25 Adding an Asset**



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

**Figure 26 Select the Organization and Asset Class**

The screenshot shows the 'New Asset' creation page. At the top, there are navigation icons for Home, Add Asset, and other toolbars. Below the toolbar, the page title is 'New Asset'. There are two required fields: 'Organization' (dropdown menu with placeholder 'Select organization...') and 'FTA Asset Class' (dropdown menu with placeholder 'Select asset class...'). A blue 'Create New Asset' button is located at the bottom of the form.

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

**Figure 27 Adding Asset Required Details**

The screenshot shows the 'Required Fields' tab of the asset creation form. The left side contains sections for 'Organization' (selected: Altoona Metro Transit), 'Service Status', 'Identification & Classification' (with fields for Vehicle Identification Number (VIN), Asset ID, Class, Type, Subtype, and Estimated Service Life (ESL) Category), and 'Fueling'. The right side contains sections for 'Characteristics' (Manufacturer, Model, Year of Manufacture, Fuel Type, Dual Fuel Type, Length, and Length Units) and 'Seating Capacity (ambulatory)'. A blue callout bubble with white text points to the 'Required Fields' tab and says: 'Any field on the required tab must be filled out'.

**Figure 28 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 button '+ Add Asset & Go to New Record'. On the right, there are sections for 'Seating Capacity (ambulatory)', 'Standing Capacity', 'ADA Accessible' (radio buttons Yes/No), 'Operations' (In Service Date, Primary Mode, Service Type (Primary Mode)), and 'Dedicated Asset' (radio buttons Yes/No). A large orange callout with the text 'Add Asset and Go To New Record Button' points to the '+ Add Asset & Go to New Record' button in the sidebar.

## 4.2 Accessing Existing Assets

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

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

**Figure 29 Existing Assets**

Capital Planning Tool (QA)

Home Asset Summary

Type	Avg. Age	Due	Agency	Num. Projects
ACTS Revenue Vehicles	2.3	\$5,793	ACTS	
ACTS Support Facilities	2.0	\$7,751	AMTRAN	
ACTS Guideway	0.0	\$0	ATA	
ACTS Power & Signal	0.0	\$0	BARTA	
ACTS Track	0.0	\$0	BCT	
AMTRAN Revenue Vehicles	12.0	\$0	BCTA	
AMTRAN Stations/Stops/Terminals	11.0	\$0	BMC	
AMTRAN Support Facilities	29.4	\$0	BSS	
AMTRAN Support Vehicles	4.9	\$0	BTA	
AMTRAN Maintenance Equipment	12.9	\$0	BUTLER	
AMTRAN Facility Equipment	30.2	\$0	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	\$61	CCTA	
AMTRAN Guideway	0.0	\$82,918	CHESSR	
AMTRAN Power & Signal	0.0	\$0	CLARCO	
AMTRAN Track	0.0	\$0	CNTRCO	

My Tasks

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

**Figure 30 Existing Asset Interface**

Capital Planning Tool (QA)

Home > Revenue Vehicles > Buses (Rubber Tire Vehicles)

Revenue Vehicles

All Buses (Rubber Tire Vehicles)

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GBB2713H3189913	GIL - Gillig Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFE4FS6HDC19987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4FS8HDC16988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4FSXHDC19992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4FS6HDC19990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4FS8HDC19991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4FSXHDC19989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4FS1HDC19993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4FS3HDC19994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4FS5HDC19995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4FS7HDC19996	FRD - Ford Motor Corporation	Champion	2017	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	1FDFE4FS8GDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*002	LCTA	1FDFE4FSXGDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GCB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GCB201731111860	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GCB201031111880	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GCB201431111896	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F185793	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

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

**Figure 31 Asset Record: Highlights**

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

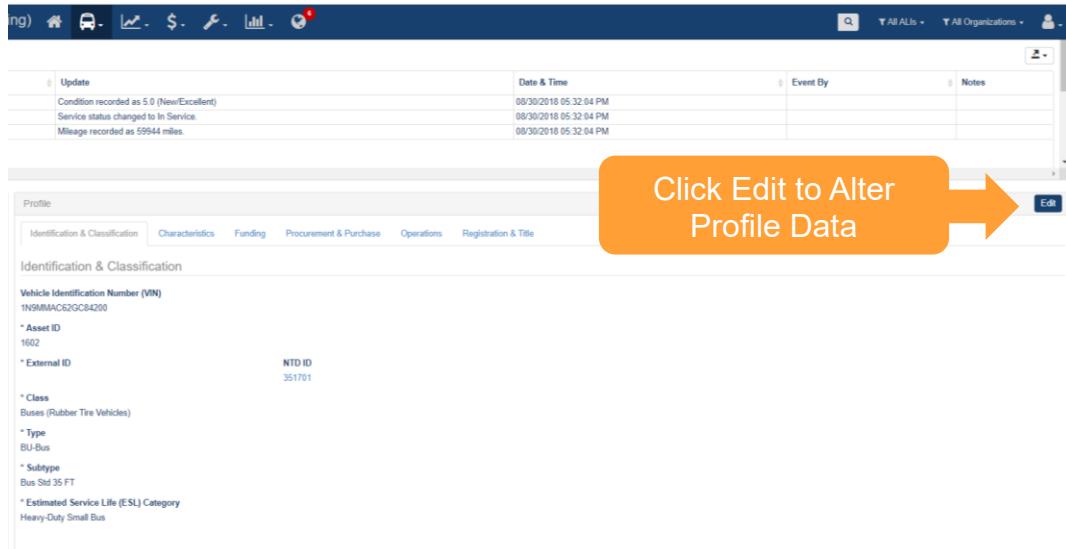
In addition to accessing asset highlight information, users can view profile or summary data for that asset.

**Figure 32 Asset Record: Profile and Summary**

External ID	NTD ID
*	
* Class	Buses (Rubber Tire Vehicles)
* Type	BU-Bus
* Subtype	Bus Std 35 FT
* Estimated Service Life (ESL) Category	Heavy-Duty Large Bus

### 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.

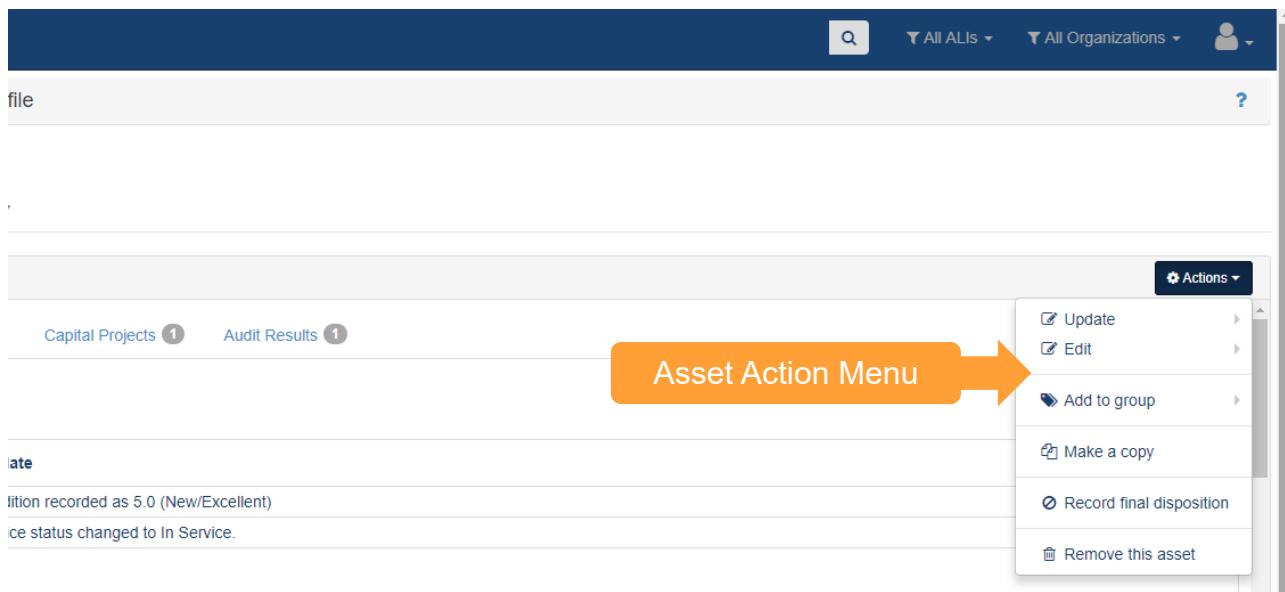
**Figure 33 Editing the Profile of an Existing Asset**

## 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 34 Updating the Lifecycle of an Existing Asset**

## 4.5 Action Events (Disposition and Transfer Review)

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

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

**Figure 35 Asset Action Events (Disposition and Transfer)**

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 projects by Agency (ACTS, AMTRAN), Num. Projects, and Cost. Below that is a 'My Notices' section with a table of notices. At the bottom, there's a 'My Tasks' section and an 'Audit Summary' section with a chart of annual inventory update results.

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 36 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 these buttons. Below is a table listing early disposition requests. The columns include checkboxes, star icons, Agency (RTTA, BARTA, YCTA), Type (Bus Maintenance Equipment, Bus Std 35 FT, Bus < 30 FT), Asset Tag (2314, 0409, 5010), Description (BUS LIFTS-LORISER IN-GROUND HYDRAULIC LIFT, CCI Opus 34 LF, CMC Challenger), Parent (empty), Location (empty), Status (O), and Age (13, 14, 1).

## 4.6 Adding or Updating Assets by Bulk Update

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

**Figure 37 Bulk Updates**

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 asset data with columns for Type, Avg. Age, and various financial metrics. On the right, there's a sidebar for 'Capital Projects' listing agencies like ACTS, AMTRAN, and BARTA. A large orange callout box highlights the 'Bulk Updates' section, which includes a table of previous bulk updates and a link to '+ Add Asset'. An orange arrow points from the 'Bulk Updates' label to the 'Bulk Updates' section in the sidebar.

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

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

**Figure 38 Bulk Update Tools**

The screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' and 'Upload a Template'. An orange callout box highlights the 'Create a new Template' button. Below this, a table lists previous bulk updates with columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. An orange callout box highlights the 'Bulk Update Tools' section at the bottom of the table.

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 39 Bulk Update Details**

Capital Planning Tool (QA)

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

**Organization**:

**Fta Asset Class**:

**Create template**

**Choose these parameters**

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

**Figure 40 Bulk Update Spreadsheet Download**

Capital Planning Tool (QA)

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 41 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	A2E18C565B2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090107	In Service	01/23/2018			2.00	01
9	A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291451090108	In Service	01/23/2018			2.00	01
10	A2E18C695LBR	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291651090109	In Service	01/23/2018			2.00	01
11	A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090110	In Service	01/23/2018			2.00	01
12	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	A2E18C8071CQ	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	A2E18C935EM	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271381091598	In Service	01/23/2018			2.00	01
16	A2E18C9AA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018			2.00	01
17	A2E18CB0HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091599	In Service	01/23/2018			2.00	01
18	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	A2E18GG6K040	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	A2E18GNG06GM	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	A2E18GUFCK1	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	IGCB29115111648	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'	IGGR271841178187	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 42 Bulk Update Upload**

The screenshot shows the 'Bulk Updates' section of the Capital Planning Tool. On the left, there's a sidebar with 'Bulk Updates' selected. The main area has a 'Spreadsheet' tab active. Under 'Spreadsheet Content', 'Inventory Updates' is selected. Under 'Organization', 'CATA\*-Centre Area Transportation Authority' is chosen. 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 43 Bulk Upload Processing**

The screenshot shows the 'Bulk Updates' page after a file has been uploaded successfully. A green banner at the top says 'File was successfully uploaded.' Below is a table titled 'Bulk Updates' with columns: Agency, File Name, Content, Loaded By, Status, Num Rows Processed, Num Rows Added, Num Rows Failed, and Processing Time. Two rows are shown:

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

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

**Figure 44 Bulk Update Edit**

## 4.7 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.

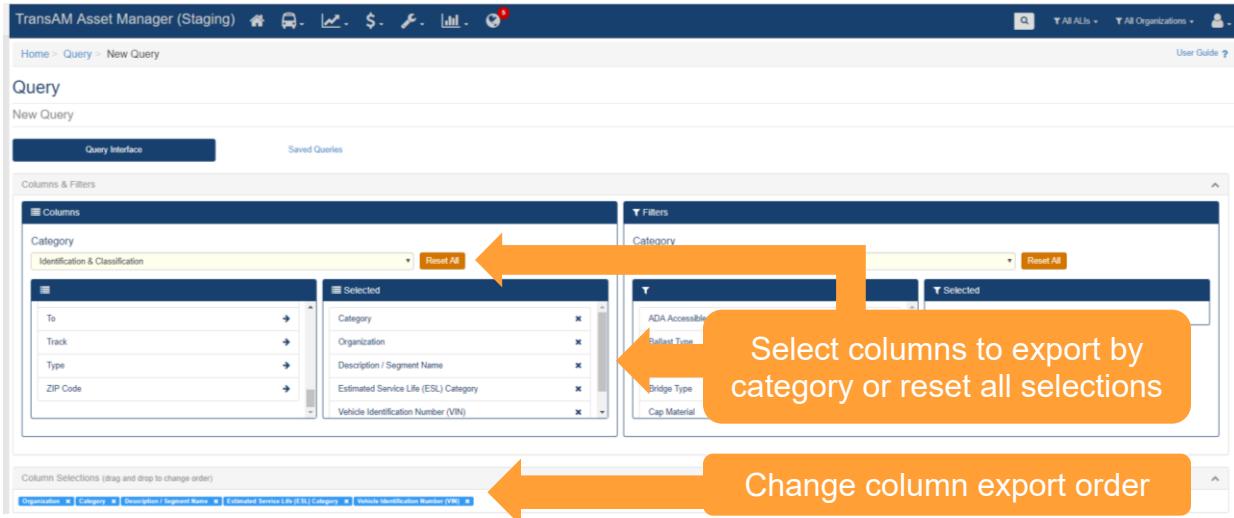
**Figure 45 Asset Query**

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

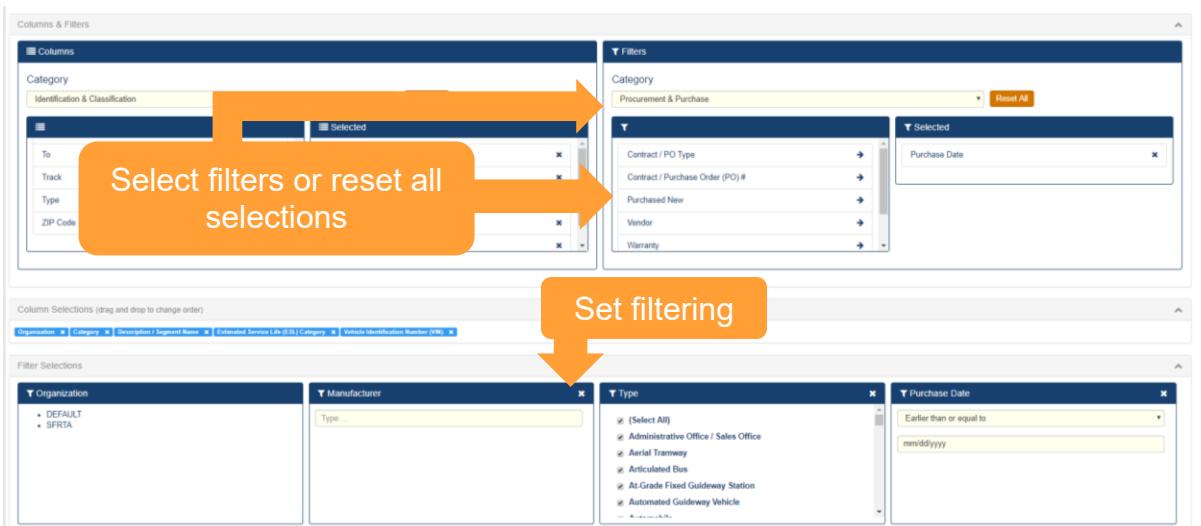
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

**Figure 46 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 47 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 48 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 49 Saved Queries**

## 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 50 Asset Groups**

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 categorized by Type (e.g., ACTS Revenue Vehicles, AMTRAN Revenue Vehicles) and Avg. Age. A context menu is open over one of the asset rows, with 'Groups' highlighted. The menu also includes options like 'Action Events', 'Map', '+ Add Asset', 'Bulk Updates', and 'Manage Groups'. To the right of the menu, a large orange arrow points to the word 'Groups'.

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

**Figure 51 Adding an Asset to a Group**

The screenshot shows the Revenue Vehicle Profile page. At the top, it says 'Revenue Vehicle Profile' and 'CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017'. Below this is a 'Highlights' section with tabs for History, Tasks, Comments, Documents, Photos, Charts, Asset Values, Capital Projects, and Audit Results. An orange arrow points to a context menu on the right side of the screen. The menu includes options like 'Update', 'Edit', 'Add to group' (which is highlighted), 'Make a copy', 'Record final disposition', and 'Remove this asset'. The 'Add to group' option is preceded by a small icon of a bus.



## 5.0 Maintenance

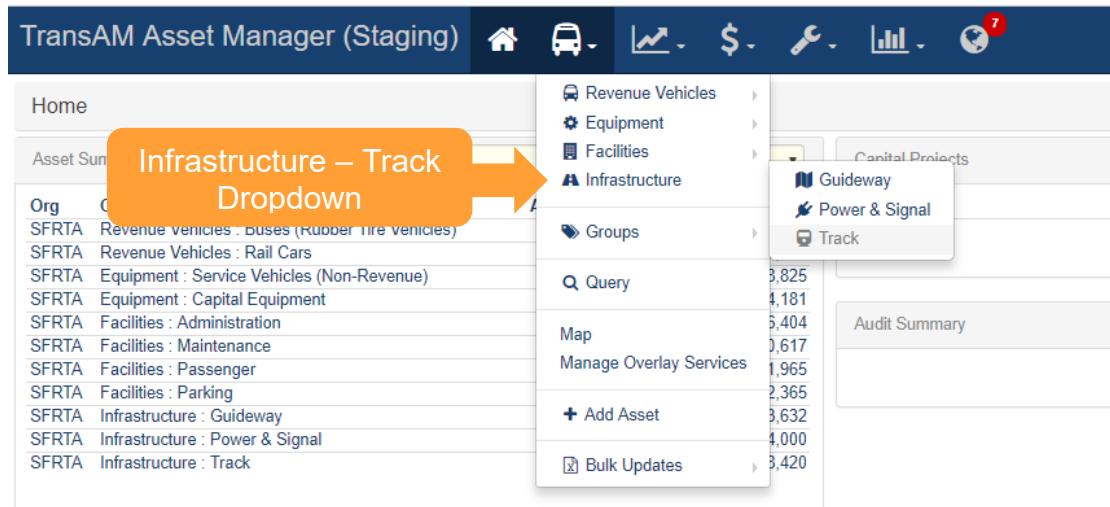
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

### 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 52 Asset Inventory Dropdown : Infrastructure - Track**



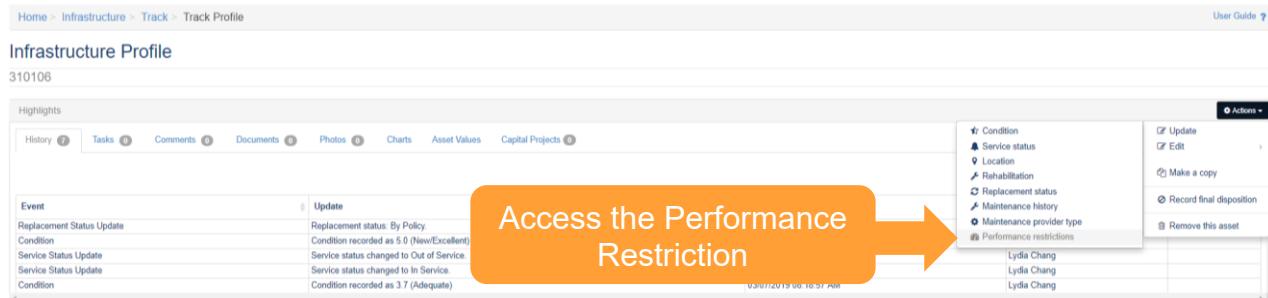
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

**Figure 53 Existing Asset Interface : Infrastructure - Track**

The screenshot shows the Existing Asset Interface for Infrastructure - Track. At the top, there's a header with 'Infrastructure' and 'All Track'. Below that is a toolbar with 'Export All', search, and filter icons. A table lists asset records 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 callout bubble points to the 'Asset ID' column, with the text 'Access the Infrastructure – Track Record' inside it. The table shows several rows of data, with the first few rows being for South Florida Rail Corridor assets.

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

**Figure 54 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 55 Performance Restriction Lifecycle Event**

Performance restrictions		Notes	
* Speed Restriction	* Unit	* Period	Performance Restriction Events should be utilized to report any speed-based performance restrictions on a single track within the right-of-way. While reporting is initiated per individual track segment, the linear reference markers can be modified to report the restriction across a larger segment of individual track. For users creating the National Transit Database Performance Report (A-90), these performance restrictions will be used to calculate performance against your annual Infrastructure Performance Target (weather restrictions will be excluded).
79.0	mph	<input type="radio"/> Set Length <input checked="" type="radio"/> Until Removed	
* Segment Unit		Track	
<input type="radio"/> Marker Posts <input type="radio"/> Lat / Long <input type="radio"/> Chaining		2	
* Line	* From	* Line	* To
SX	971.9	SX	975.3
From (Location Name)		To (Location Name)	
<input type="text"/>		<input type="text"/>	
Associated Linear Asset Records			
310107	310108	310109	310110
* Restriction Cause			
<input type="text"/>			
* Date of Performance Restriction			
03/14/2019 07:13:32 PM			
Comments			
<input type="text"/>			
<input type="button" value="Update Performance Restrictions"/>			

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 56 Maintenance Dropdown**

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

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

**Figure 57 Performance Restriction Management**

The screenshot shows a table titled 'Performance Restrictions' with a header 'Active Restrictions'. The table has columns for Status, Active Start, Active End, Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. The table lists several rows of restriction data, each with a 'Closeout' button in the 'Comments' column. A note at the bottom left 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	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	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	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	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	Maintenance	03/12/2019 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	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	Rail Defect	03/13/2019 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	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 58 Policies Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Money, and a globe. Below the navigation bar is a main content area divided into two sections: 'Asset Summary' on the left and 'Policies' on the right. The 'Asset Summary' section contains a table with columns for Type, Avg. Age, and Count, listing various asset categories like ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, etc. The 'Policies' section displays a table titled 'Capital Projects' with columns for Agency, Num. Projects, and Cost, showing data for various agencies such as ACTS, AMTRAN, BARTA, BCT, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CARS, and CAT. An orange arrow points from the text 'Policies Dropdown' to the 'Policies' link in the main navigation bar.

Type	Avg. Age	Count
ACTS Revenue Vehicles	3.3	23
ACTS Support Facilities	2.0	1
AMTRAN Revenue Vehicles	11.8	29
AMTRAN Stations/Stops/Terminals	10.6	5
AMTRAN Support Facilities	29.0	5
AMTRAN Support Vehicles	4.6	7
AMTRAN Maintenance Equipment	12.7	211
AMTRAN Facility Equipment	30.5	90
AMTRAN IT Equipment	6.2	84
AMTRAN Office Equipment	14.0	204
AMTRAN Communications Equipment	7.0	61
AMTRAN Signals/Signs	7.0	12
ATA Revenue Vehicles	8.1	104

Agency	Num. Projects	Cost
ACTS	2	\$85,768
AMTRAN	5	\$1,287,100
BARTA	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 59 Policy Rule Sets**

The screenshot shows the Capital Planning Tool (QA) interface with the 'Policies' link selected in the main navigation bar. The page displays two policy rule sets: 'Asset Replacement/Rehabilitation ...' and 'TAM Policy'. An orange arrow points from the text 'Policy Rule Sets' to the 'TAM Policy' link. The 'Asset Replacement/Rehabilitation ...' section includes a link to 'Asset Replacement/Rehabilitation Policy'. The 'TAM Policy' section includes a link to 'TAM Policy'.

### 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 60 Asset Replacement/Rehabilitation Policy**

The screenshot shows the Capital Planning Tool (QA) interface. In the top navigation bar, there is a dropdown menu labeled "Policies" which is currently open. The "Asset Replacement/Rehabilitation Policy" option is highlighted with a blue arrow pointing to it from the right side of the screen. A large orange callout bubble with the text "Asset Replacement/Rehabilitation Selection" is positioned over the policy dropdown. On the left, there is a table titled "Asset Summary" showing various asset types like ACTS Revenue Vehicles, ACTS Support Facilities, etc., with their average age, count, cost, and book value. On the right, there is a list of organizations: BARTA, BCT, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CARS, and CAT. At the bottom right, there is a "Audit" button.

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 61 Asset Replacement/Rehabilitation Policy Filters**

The screenshot shows the "Asset Replacement/Rehabilitation Policy" filters page. At the top, there is a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. Below the breadcrumb, there is a section titled "Asset Replacement/Rehabilitation Policy". Under "Filters", there is a dropdown for "Organization" set to "BPT-PennDOT Bureau of Public Transportation" and a dropdown for "Policy Year" set to "FY 2017 Statewide Transit Policy (Current)". Two orange arrows point upwards from the "Organization Filter" and "Policy Year" sections towards the "Policy Rules" section above them. The "Policy Rules" section contains fields for "Policy Owner" (PennDOT Bureau of Public Transporta), "Description" (FY 2017 Statewide Transit Policy), "Active" status, and "Actions" button. Below these are tables for "Service Life Calculation Method" (Age Only), "Repl. Cost Calculation Method" (Purchase Price + Interest), "Condition Rollup Calculation Method" (Weighted Average), "Annual Inflation Rate" (1.10), "Pct Residual Value" (0%), and "Last Updated" (07:58 AM 12/05/2015). There is also a "Print" icon.

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 62 Policy Rules**

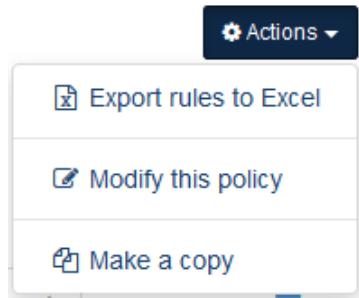
The screenshot shows the 'Policy Rules' page with the following details:

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

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

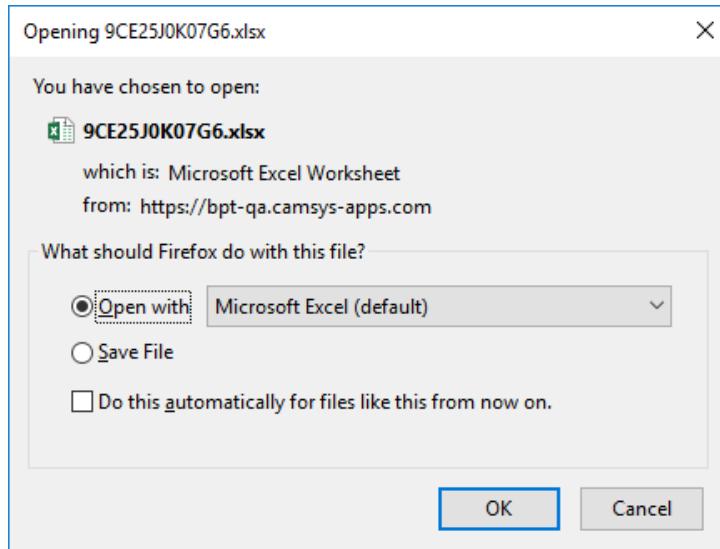
The Actions button will display a list of options as shown.

**Figure 63 Policy Rules Actions Dropdown**



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

**Figure 64 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 65 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 66 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 67 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 68 Additional Assets Dropdown Icon**

The Asset Type Rules are listed below the Asset Types.

**Figure 69 Asset Type Rules**

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

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

**Figure 70 Edit Icon**

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

**Figure 71 Modify Asset Policy Rule**

## Modify Rule: IT Equipment

\* Service Life Calculation Type      \* Replacement Cost Calculation Type      Condition Rollup Calculation Type  
 Age Only      Purchase Price + Interest      Weighted Average  
 \* Annual Inflation Rate      \* Pct Residual Value      \* Condition Rollup Weight  
 1.1      0      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 72 Asset Type and Asset Subtype rules**

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

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

**Figure 73 Modify Asset Subtype Rule**

\* ESL (Mo)      \* Replacement Cost      \* Cost FY  
 1200      \$ 0      FY 18-19       Replace With New  
 Replace With Leased  
 \* ESL Used (Mo)  
 0      0  
 \* Purchase Replacement Code  
 12.22.06      \* Lease Replacement Code  
 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 74 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 75 TAM Policy Dropdown Menu Selection**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, Policies, and other tools. Below this is a table titled 'Asset Summary' showing various asset types like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc., with columns for Type, Avg. Age, Count, Cost, and Book Value. To the right of the table is a 'Policies' section with links to Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. A dropdown menu is open over the 'Policies' link, showing options for Asset Replacement/Rehab and TAM Policy. An orange callout bubble points to the 'TAM Policy' option in the menu, with the text 'TAM Policy Selection' next to it. The background shows a sidebar with 'My Mess' and 'Perform' sections.

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 76 TAM Policy Performance Measures

The screenshot shows the 'TAM Policy' section of the Capital Planning Tool. At the top, there are tabs for 'Group Management', 'Group Metrics', and 'Performance Measures'. The 'Performance Measures' tab is selected. Below the tabs, there are filter options for 'Policy Year' (set to 2021), 'Period' (set to July - June), 'Group Name' (set to New Group), and 'Organization' (set to BCTA-Beaver County Transit Authority). A large orange arrow points from the explanatory text below to the 'View' button in the filters section.

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

## Figure 77 Policy Year Filters

The screenshot shows the 'Performance Measures' section with filters for 'Policy Year' (2018), 'Period' (July - June), 'Group Name' (New Group), and 'Organization' (BCTA-Beaver County Transit Authority). Below the filters, a message says 'Performance Measures : 2018 : July - June : New Group : BCTA'. A large orange arrow points from the explanatory text below to the 'Asset Category' dropdown in the filters section.

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 78 Asset Type Percentage Settings

The screenshot shows the 'Performance Measures' section with filters for 'Policy Year' (2018), 'Period' (July - June), 'Group Name' (New Group), and 'Organization' (BCTA-Beaver County Transit Authority). Below the filters, a message says 'Performance Measures : 2018 : July - June : New Group : BCTA'. The main area shows asset settings for 'Revenue Vehicles'. It includes a table with columns for Asset Class/Type, ULB, Editable/Locked, Goal Pcnt, and Editable/Locked. The table data is as follows:

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 79 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><a href="#">View</a></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	<a href="#">View</a>	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	<a href="#">View</a>																							
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 Funding

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

### 7.1 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 80 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 81 Funding Program Details**



## 8.0 Reports

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

**Figure 82 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 three rows: AMTRAN, ATA, and a total row.

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 83 Report Exports**

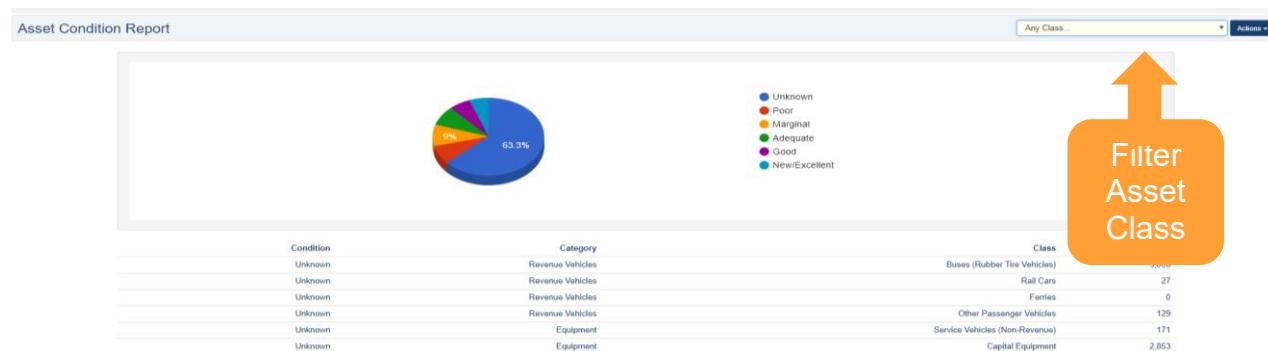
The screenshot shows a report interface with a green 'Actions' button. A dropdown menu is open, listing three options: 'Print to PDF', 'Export as CSV', and 'Export Underlying Data'. An orange arrow points from the text 'Report Exports' to this dropdown menu.

### 8.1 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 84 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 85 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 86 Asset Funding Source Report**



## 8.2 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 87 Backlog Report**



## 8.3 Planning Reports

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

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

**Figure 88 Revenue Vehicle Replacement Report**

The figure shows a 'Revenue Vehicle Replacement Report' interface. At the top, there is a table header with columns: Fiscal Year, Category, Class, Sub Type, Count, Book Value, and Replacement Cost. The data is as follows:

Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	\$226,647	\$1,032,574
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	28	\$10,703,185	\$15,361,540
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	\$405,086	\$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 89 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 90 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 91 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 92 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



## 9.0 Specialized Reports

### 9.1 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 93 Asset Fleet Builder**

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

Build Revenue or Support Fleets

Build Revenue Vehicles Fleets

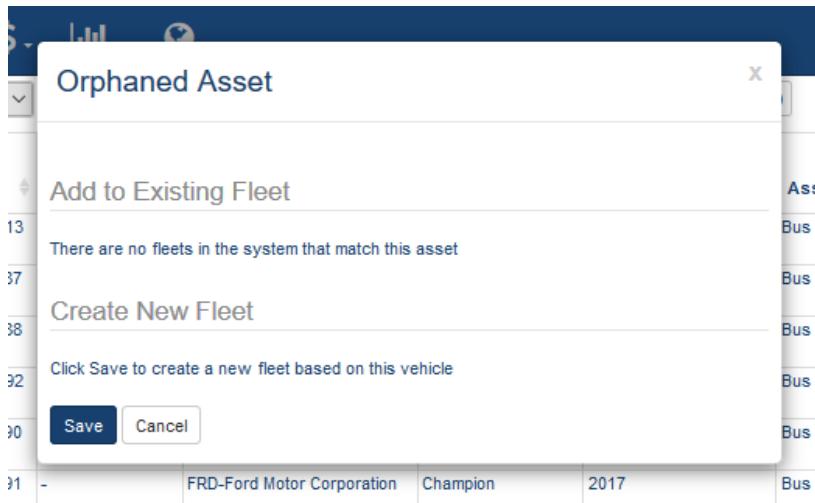
Build Support Vehicles Fleets

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

**Figure 94 Asset Fleet Builder—Orphaned Assets**

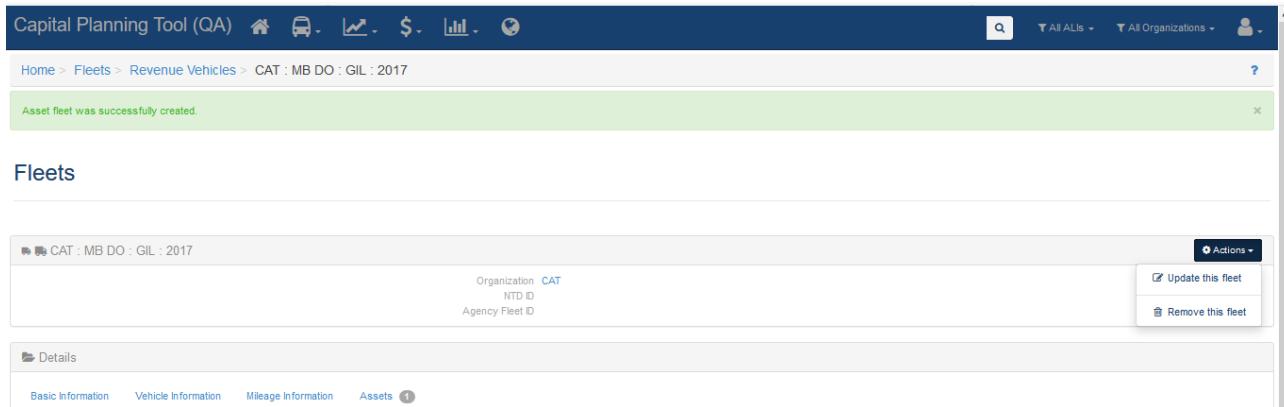
The screenshot shows the 'Fleets' section of the Capital Planning Tool (QA). At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is selected. Below it, the 'Orphaned Assets' section is displayed with a table of assets. The table includes columns for Agency, Asset Type, Tag, ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. Several rows of asset data are listed. In the bottom right corner of the table, there is a button labeled 'Add Asset to Fleet'. An orange arrow points from this button to a similar button in a 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 95 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 96 Adding a New Fleet**

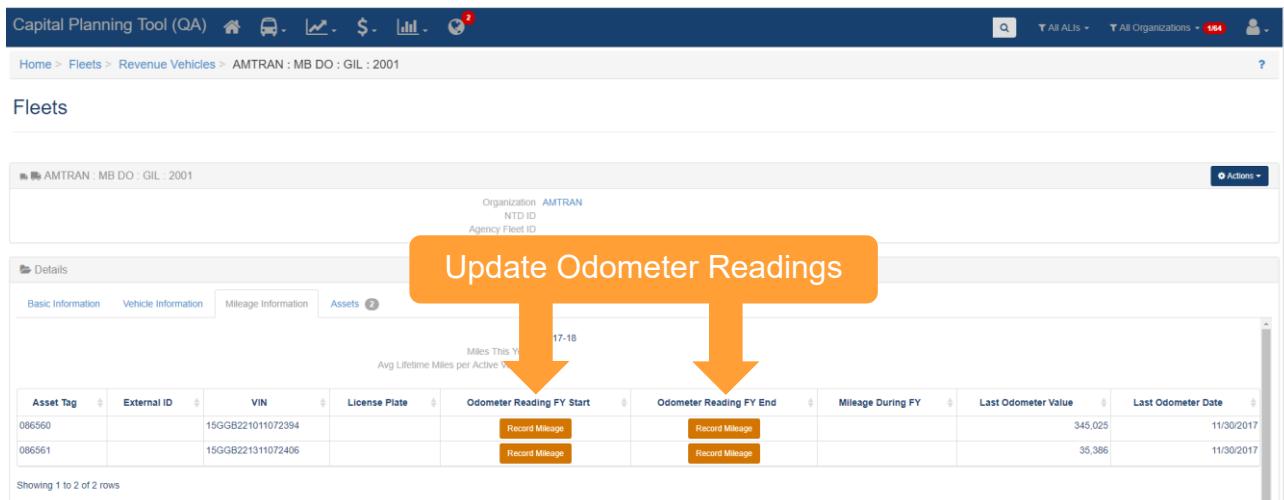


**Figure 97 Update Asset Fleet Details**

#### Update Asset Fleet

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

**Figure 98 Update Odometer Readings**



**Figure 99 Remove or Add Assets from within a Fleet**

The screenshot shows the TransAM Capital Planning Tool interface. At the top, there's a navigation bar with icons for Home, Fleets, Revenue Vehicles, and a search bar. Below that is a breadcrumb trail: Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001. The main content area is titled 'Fleets' and shows a list 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 are visible: 086561 and 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	

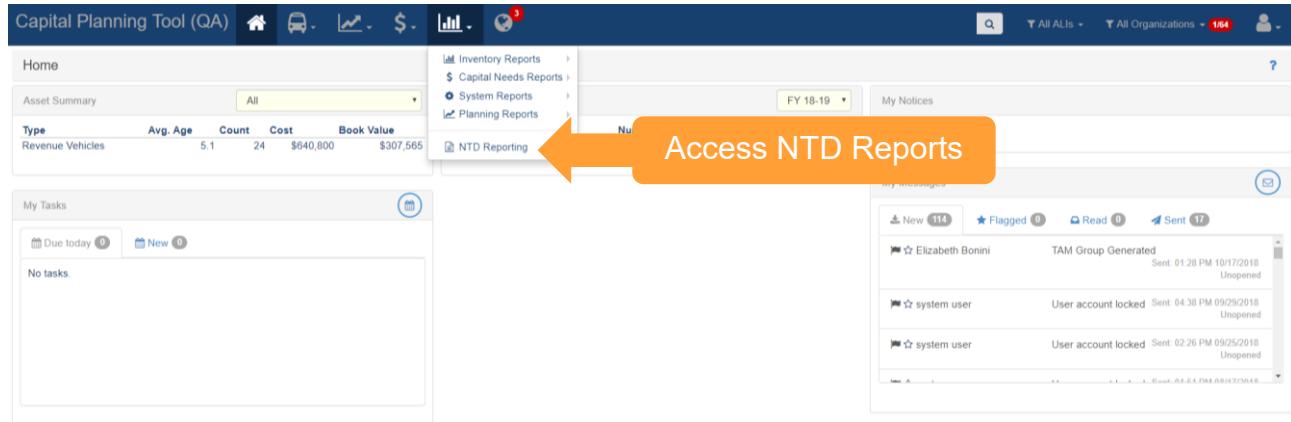
## 9.2 NTD Asset Reports

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 100 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 101 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' (Unsubmitted), and 'Created At' (10:41 AM 10/19/2018). The creator is listed as Elizabeth Bonini. Below the filters is a table with one row, showing the same information as the header. Two orange arrows point to the table: one from the text 'Create New NTD Forms' pointing to the 'New NTD Form' button, and another from the text 'Click to Access Existing Forms' pointing to the table row.

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

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

**Figure 102 Create New Reporting Year Forms**

New NTD Report

**Organization**  
BUTLER-Buller 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 103 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 104 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**