



# TransAM

*Administrative User*

# User Guide

*prepared for*

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

*prepared by*

**Cambridge Systematics, Inc.**



*user guide*

# TransAM

## *Administrative User*

*prepared for*

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

*prepared by*

**Cambridge Systematics, Inc.**

101 Station Landing, Suite 410  
Medford, MA 02155

*date*

**September 28, 2019**

---



# Table of Contents

|            |   |           |
|------------|---|-----------|
| <b>1.0</b> | <b>Welcome!</b>                                 | <b>1</b>  |
| 1.1        | Initial Log In and Password Reset               | 1         |
| 1.2        | Ongoing Site Access                             | 2         |
| <b>2.0</b> | <b>Dashboard</b>                                | <b>3</b>  |
| 2.1        | Dashboard Elements                              | 3         |
| 2.2        | Header Menu and Controls                        | 3         |
| <b>3.0</b> | <b>General Features and Tools</b>               | <b>5</b>  |
| 3.1        | Table Controls                                  | 5         |
| 3.2        | Site Filters                                    | 5         |
| 3.3        | Messages  | 6         |
| 3.4        | Organizations Filter                            | 7         |
| 3.5        | Search  | 8         |
| 3.6        | User and Organization Options                   | 8         |
| 3.7        | Notifications                                   | 10        |
| 3.8        | Help  | 10        |
| <b>4.0</b> | <b>Asset Inventory</b>                          | <b>13</b> |
| 4.1        | Add an Asset                                    | 13        |
| 4.2        | Accessing Existing Assets                       | 15        |
| 4.3        | Editing or Updating Existing Asset Profile Data | 17        |
| 4.4        | Updating Existing Asset Lifecycle Data          | 18        |
| 4.5        | Action Events (Disposition and Transfer Review) | 19        |
| 4.6        | Adding or Updating Assets by Bulk Update        | 21        |
| 4.7        | Query   | 24        |
| 4.8        | Groups  | 27        |
| <b>5.0</b> | <b>Maintenance</b>                              | <b>29</b> |
| 5.1        | Performance Restrictions                        | 29        |
| <b>6.0</b> | <b>Policies</b>                                 | <b>33</b> |
| 6.1        | Asset Replacement/Rehabilitation Policy         | 33        |
| 6.2        | TAM Policy                                      | 41        |
| <b>7.0</b> | <b>Funding</b>                                  | <b>51</b> |
| 7.1        | Programs  | 51        |
| 7.2        | Grants  | 52        |

|                                      |           |
|--------------------------------------|-----------|
| <b>8.0 Reports .....</b>             | <b>57</b> |
| 8.1 Inventory Reports.....           | 57        |
| 8.2 Capital Needs Reports.....       | 59        |
| 8.3 System Reports .....             | 59        |
| 8.4 Planning Reports .....           | 60        |
| <b>9.0 Specialized Reports .....</b> | <b>63</b> |
| 9.1 Asset Fleet Builder.....         | 63        |
| 9.2 NTD Asset Reports.....           | 66        |
| <b>10.0 Admin Tools.....</b>         | <b>69</b> |
| 10.1 Organizations.....              | 70        |
| 10.2 Users .....                     | 71        |
| 10.3 Notices .....                   | 72        |
| 10.4 Online Users .....              | 73        |
| 10.5 Client Admin Interface.....     | 74        |
| 10.6 System Admin Interface.....     | 75        |

## List of Figures

|           |  |    |
|-----------|--|----|
| Figure 1  | Password Reset Request Screen.....                   | 1  |
| Figure 2  | Set/Reset Password Screen.....                       | 1  |
| Figure 3  | Login Screen.....                                    | 2  |
| Figure 4  | Dashboard Elements .....                             | 3  |
| Figure 5  | Header Menu .....                                    | 3  |
| Figure 6  | Sorting Controls .....                               | 5  |
| Figure 7  | Export Button .....                                  | 5  |
| Figure 8  | Table Tools .....                                    | 5  |
| Figure 9  | Filter Icon .....                                    | 5  |
| Figure 10 | User Profile Messages .....                          | 6  |
| Figure 11 | Messages .....                                       | 6  |
| Figure 12 | Message Interface .....                              | 7  |
| Figure 13 | Organization Filter .....                            | 7  |
| Figure 14 | Organization Filter Selections.....                  | 7  |
| Figure 15 | Search Box .....                                     | 8  |
| Figure 16 | User Menu .....                                      | 8  |
| Figure 17 | User Menu Dropdown.....                              | 8  |
| Figure 18 | Organization Details .....                           | 9  |
| Figure 19 | Profile Details.....                                 | 9  |
| Figure 20 | Report an Issue .....                                | 10 |
| Figure 21 | Notification Drawer .....                            | 10 |
| Figure 22 | User Guide.....                                      | 11 |
| Figure 23 | Asset Inventory Dropdown .....                       | 13 |
| Figure 24 | Adding an Asset.....                                 | 13 |
| Figure 25 | Select the Organization and Asset Class .....        | 14 |
| Figure 26 | Adding Asset Required Details .....                  | 14 |
| Figure 27 | Add the Asset and Go To The New Record .....         | 15 |
| Figure 28 | Existing Assets .....                                | 16 |
| Figure 29 | Existing Asset Interface .....                       | 16 |
| Figure 30 | Asset Record: Highlights .....                       | 17 |
| Figure 31 | Asset Record: Profile and Summary .....              | 17 |
| Figure 32 | Editing the Profile of an Existing Asset.....        | 18 |
| Figure 33 | Updating the Lifecycle of an Existing Asset .....    | 19 |
| Figure 34 | Asset Action Events (Disposition and Transfer) ..... | 20 |
| Figure 35 | Early Disposition Requests.....                      | 20 |

---

|           |   |    |
|-----------|---|----|
| Figure 36 | Bulk Updates .....                                      | 21 |
| Figure 37 | Bulk Update Tools .....                                 | 21 |
| Figure 38 | Bulk Update Details .....                               | 22 |
| Figure 39 | Bulk Update Spreadsheet Download.....                   | 22 |
| Figure 40 | Bulk Update Spreadsheet.....                            | 22 |
| Figure 41 | Bulk Update Upload.....                                 | 23 |
| Figure 42 | Bulk Upload Processing .....                            | 23 |
| Figure 43 | Bulk Update Edit.....                                   | 24 |
| Figure 44 | Asset Query .....                                       | 24 |
| Figure 45 | Column Selection.....                                   | 25 |
| Figure 46 | Filter Selection .....                                  | 25 |
| Figure 47 | Calculate, Export or Save .....                         | 26 |
| Figure 48 | Saved Queries .....                                     | 26 |
| Figure 49 | Asset Groups .....                                      | 27 |
| Figure 50 | Adding an Asset to a Group .....                        | 27 |
| Figure 51 | Asset Inventory Dropdown : Infrastructure - Track.....  | 29 |
| Figure 52 | Existing Asset Interface : Infrastructure - Track ..... | 29 |
| Figure 53 | Lifecycle Action Menu.....                              | 30 |
| Figure 54 | Performance Restriction Lifecycle Event.....            | 30 |
| Figure 55 | Maintenance Dropdown.....                               | 31 |
| Figure 56 | Performance Restriction Management .....                | 31 |
| Figure 57 | Policies Dropdown .....                                 | 33 |
| Figure 58 | Policy Rule Sets.....                                   | 33 |
| Figure 59 | Asset Replacement/Rehabilitation Policy .....           | 34 |
| Figure 60 | Asset Replacement/Rehabilitation Policy Filters .....   | 34 |
| Figure 61 | Policy Rules .....                                      | 35 |
| Figure 62 | Policy Rules Actions Dropdown.....                      | 35 |
| Figure 63 | Export rules to Excel (Windows dialog box) .....        | 35 |
| Figure 64 | Modify (Update) Organization Policy Dialog.....         | 36 |
| Figure 65 | Distribute Policy .....                                 | 36 |
| Figure 66 | Copy Organization Policy Dialog .....                   | 37 |
| Figure 67 | Asset Types .....                                       | 37 |
| Figure 68 | Additional Assets Dropdown Icon.....                    | 37 |
| Figure 69 | Asset Type Rules.....                                   | 38 |
| Figure 70 | Add an Asset Type Rule Dialog Box .....                 | 38 |
| Figure 71 | Edit Icon.....  | 38 |
| Figure 72 | Modify Asset Policy Rule .....                          | 39 |

---

---

|            |   |    |
|------------|---|----|
| Figure 73  | Asset Type and Asset Subtype rules.....                 | 39 |
| Figure 74  | Add an Asset Subtype Rule Icon.....                     | 39 |
| Figure 75  | Add an Asset Subtype Rule Dialog .....                  | 40 |
| Figure 76  | Modify Asset Subtype Rule .....                         | 40 |
| Figure 77  | Remove Asset Subtype Rule.....                          | 40 |
| Figure 78  | TAM Policy Dropdown Menu Selection .....                | 41 |
| Figure 79  | TAM Policy Group Management .....                       | 41 |
| Figure 80  | TAM Policy Year.....                                    | 42 |
| Figure 81  | Add New TAM Policy Year .....                           | 42 |
| Figure 82  | Group Management Period and Year.....                   | 43 |
| Figure 83  | Add Group Button.....                                   | 43 |
| Figure 84  | Add TAM Group Dialog .....                              | 43 |
| Figure 85  | Add TAM Group Dialog <i>With Selections</i> .....       | 44 |
| Figure 86  | Add TAM Group <i>Selections, Asset Categories</i> ..... | 44 |
| Figure 87  | TAM Group Mangement Status.....                         | 45 |
| Figure 88  | TAM Policy Group Metrics.....                           | 45 |
| Figure 89  | Editable and Locked Assets .....                        | 46 |
| Figure 90  | Asset Type Percentage Settings .....                    | 46 |
| Figure 91  | Distribute TAM Policy .....                             | 47 |
| Figure 92  | Distributed TAM Policy .....                            | 47 |
| Figure 93  | TAM Policy Performance Measures .....                   | 48 |
| Figure 94  | Policy Year Filters.....                                | 48 |
| Figure 95  | Asset Type Percentage Settings .....                    | 48 |
| Figure 96  | Activate Perfomance Measures.....                       | 49 |
| Figure 97  | Available Funding Programs .....                        | 51 |
| Figure 98  | Funding Program Details.....                            | 51 |
| Figure 99  | Grants Dropdown.....                                    | 52 |
| Figure 100 | Adding a Grant.....                                     | 52 |
| Figure 101 | Adding Required Details (New Grants) .....              | 52 |
| Figure 102 | Grants Table .....                                      | 53 |
| Figure 103 | Accessing an Existing Grant.....                        | 53 |
| Figure 104 | Editing or Updating an Existing Grant .....             | 54 |
| Figure 105 | Managing the Lifecycle of a Grant.....                  | 54 |
| Figure 106 | Managing Grant Amendments.....                          | 55 |
| Figure 107 | Adding Required Details (Grant Amendments) .....        | 55 |
| Figure 108 | Reports Dropdown.....                                   | 57 |
| Figure 109 | Report Exports.....                                     | 57 |

---

|            |  |    |
|------------|--|----|
| Figure 110 | Asset Condition Report.....                    | 57 |
| Figure 111 | Asset Age Report.....                          | 58 |
| Figure 112 | Asset Funding Source Report .....              | 58 |
| Figure 113 | Backlog Report .....                           | 59 |
| Figure 114 | User Login Report.....                         | 59 |
| Figure 115 | Issues Report.....                             | 60 |
| Figure 116 | Revenue Vehicle Replacement Report .....       | 60 |
| Figure 117 | State of Good Repair Report.....               | 61 |
| Figure 118 | Disposition Report .....                       | 61 |
| Figure 119 | Asset Service Life Summary Report.....         | 61 |
| Figure 120 | TAM Service Life Summary Report.....           | 62 |
| Figure 121 | Asset Fleet Builder.....                       | 63 |
| Figure 122 | Asset Fleet Builder—Orphaned Assets .....      | 64 |
| Figure 123 | Adding an Orphaned Asset to a Fleet .....      | 64 |
| Figure 124 | Adding a New Fleet .....                       | 65 |
| Figure 125 | Update Asset Fleet Details .....               | 65 |
| Figure 126 | Update Odometer Readings.....                  | 65 |
| Figure 127 | Remove or Add Assets from within a Fleet ..... | 66 |
| Figure 128 | Access NTD Reports .....                       | 67 |
| Figure 129 | Table of Previously Generated NTD Reports..... | 67 |
| Figure 130 | Create New Reporting Year Forms .....          | 68 |
| Figure 131 | NTD Report Details and Data.....               | 68 |
| Figure 132 | Download each NTD Form .....                   | 68 |
| Figure 133 | Admin User and Organization Options .....      | 69 |
| Figure 134 | Organizations.....                             | 69 |
| Figure 135 | Admin User Options.....                        | 70 |
| Figure 136 | Admin Organizations .....                      | 70 |
| Figure 137 | Add an Organization.....                       | 71 |
| Figure 138 | Admin Users .....                              | 71 |
| Figure 139 | Add a User.....                                | 72 |
| Figure 140 | Notices.....                                   | 72 |
| Figure 141 | Add a Notice .....                             | 73 |
| Figure 142 | Notice on the Dashboard.....                   | 73 |
| Figure 143 | Active Users.....                              | 74 |
| Figure 144 | Client Admin Interface .....                   | 74 |
| Figure 145 | System Admin Interface .....                   | 75 |

---

# 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.

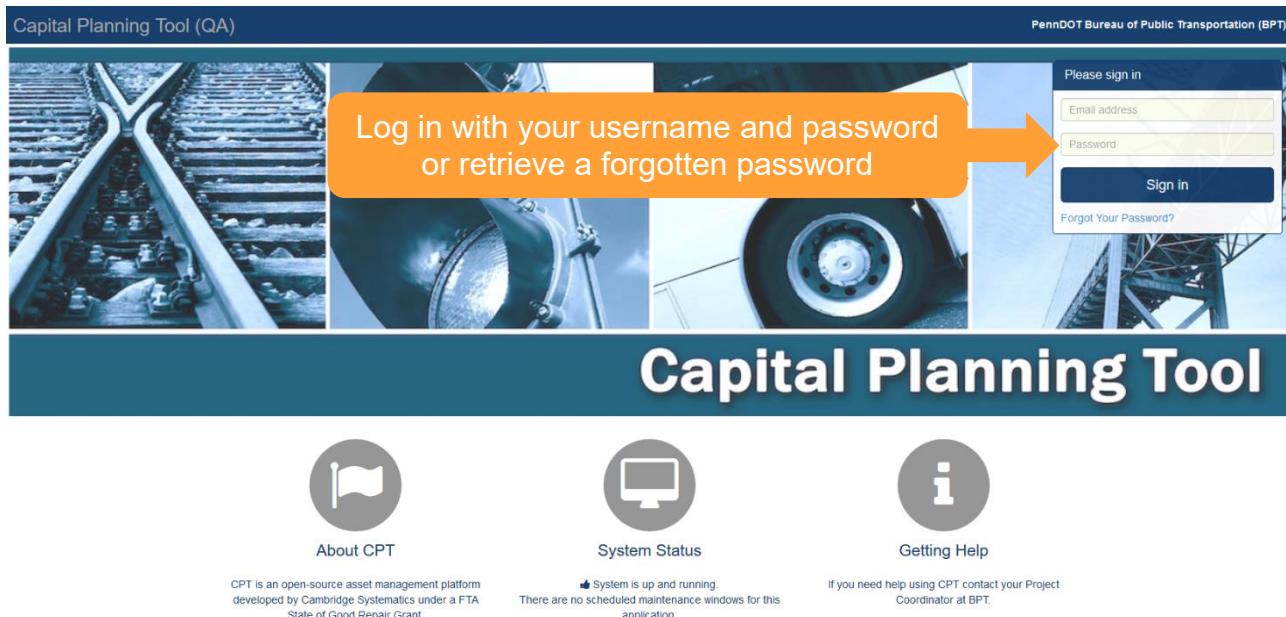
**Figure 2 Set/Reset Password Screen**

## 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



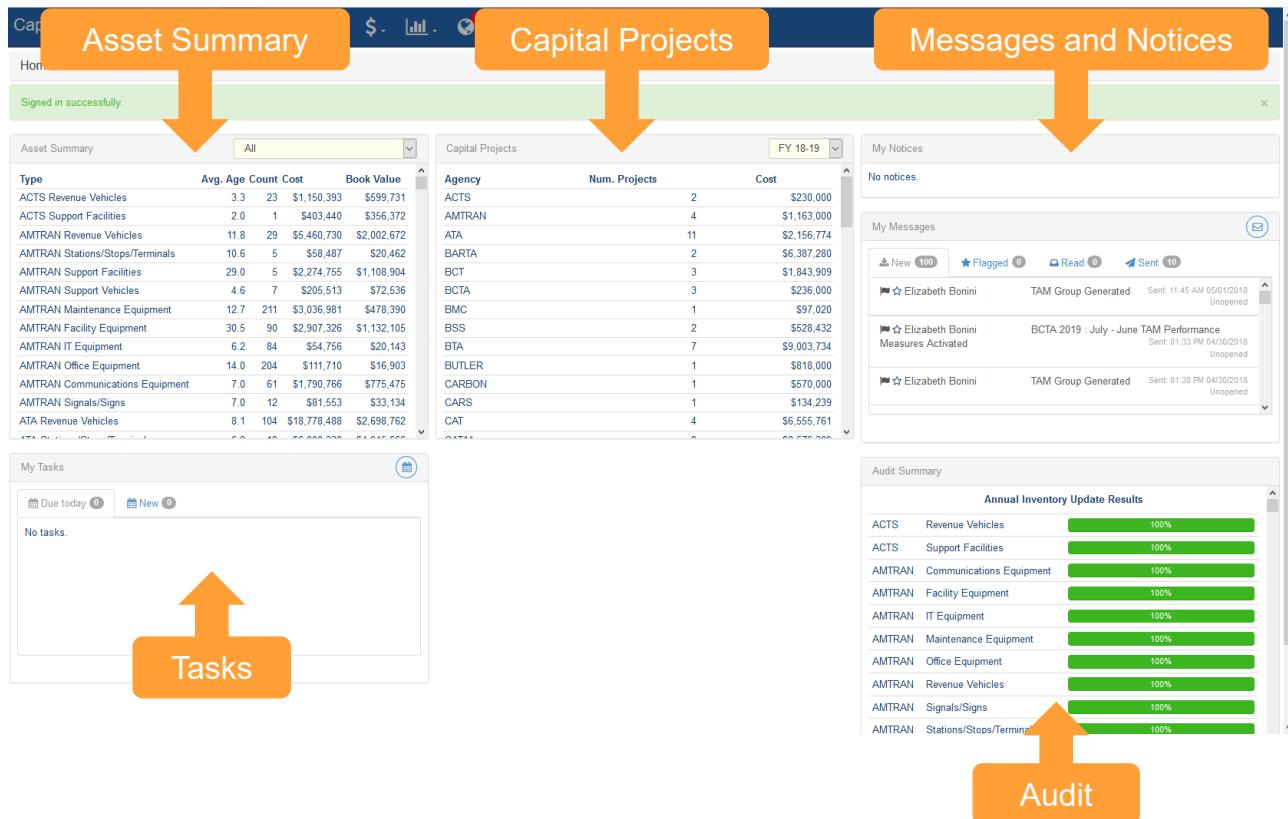
## 2.0 Dashboard

### 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.

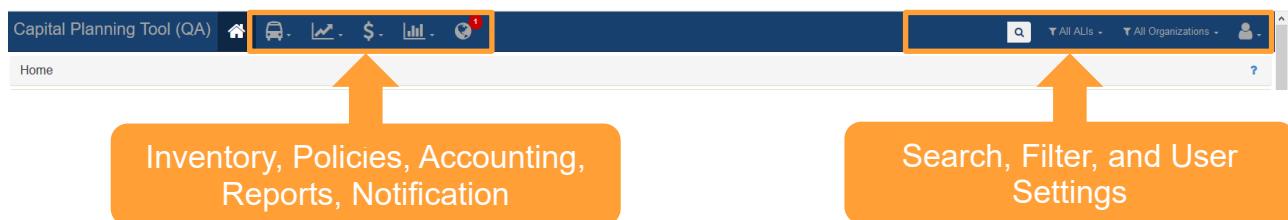
**Figure 4** Dashboard Elements



### 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.

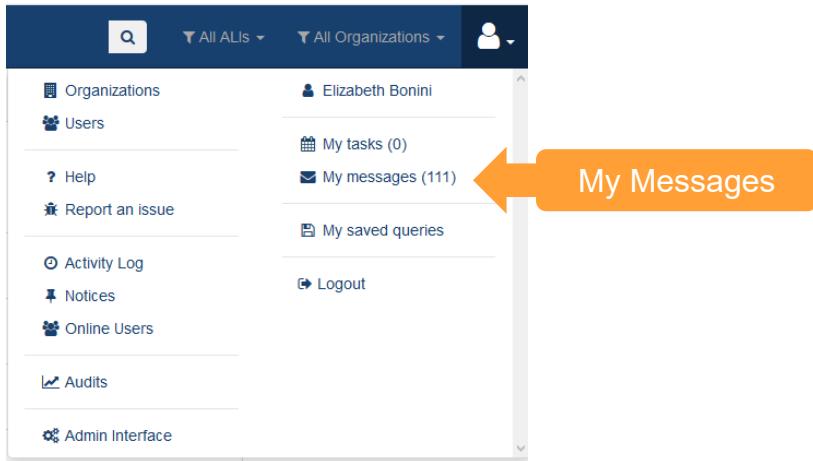
**Figure 9 Filter Icon**



### 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.

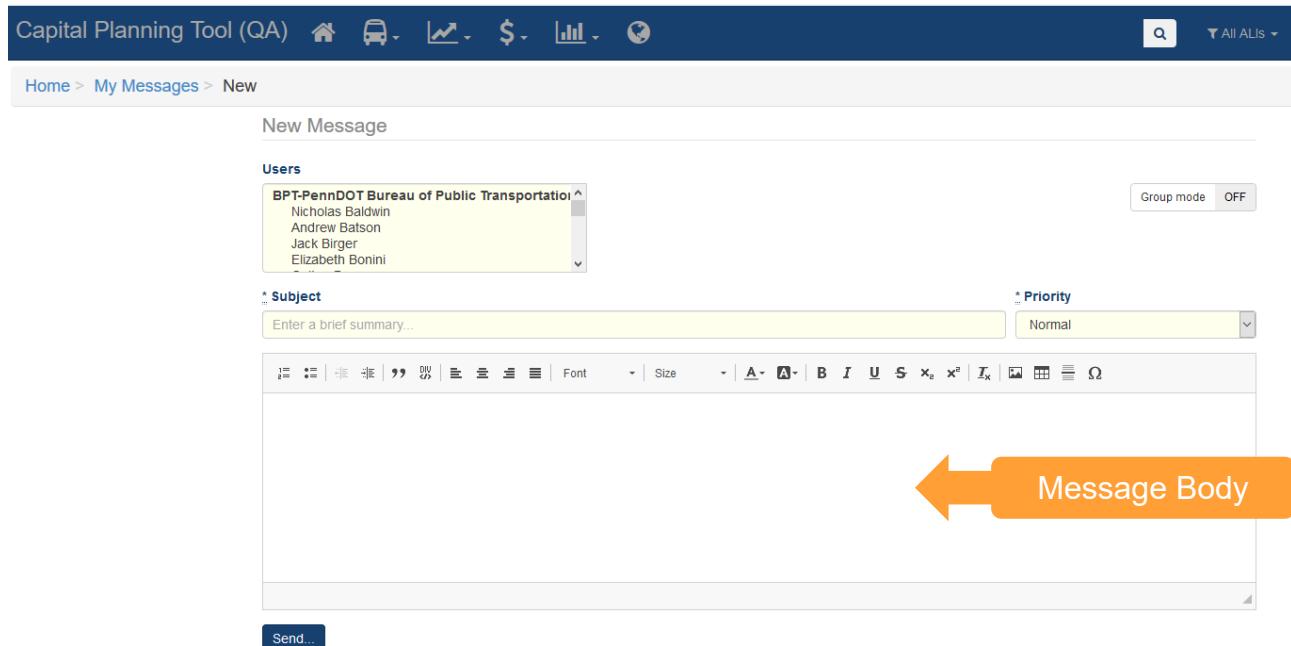
**Figure 11 Messages**

The screenshot shows the 'My Messages' page of the Capital Planning Tool (QA). At the top, there are navigation icons for Home, Bus, Graph, Dollar, Bar, and Mail. Below that is a breadcrumb trail: Home > My Messages. The main area has a 'Compose' button and a 'Refresh' button. Below these are buttons for 'New (111)', 'Flagged (0)', 'Inbox (0)', and 'Sent (0)'. The inbox list shows three messages from 'system user': 'User account locked' (Sent: 01:51 PM 08/17/2018, Unopened), 'User account locked' (Sent: 12:22 PM 07/15/2018, Unopened), and 'User account locked' (Sent: 11:21 AM 07/15/2018, Unopened).

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

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

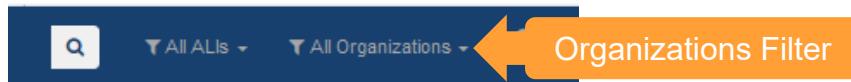
**Figure 12 Message Interface**



### 3.4 Organizations Filter

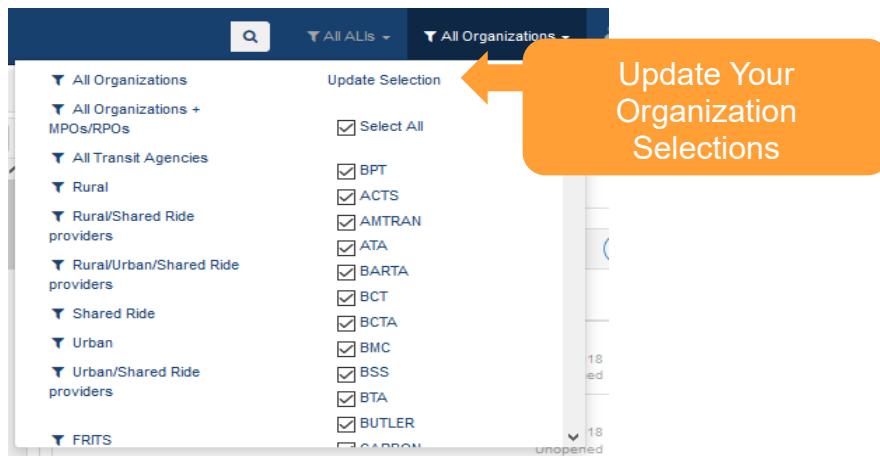
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

**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

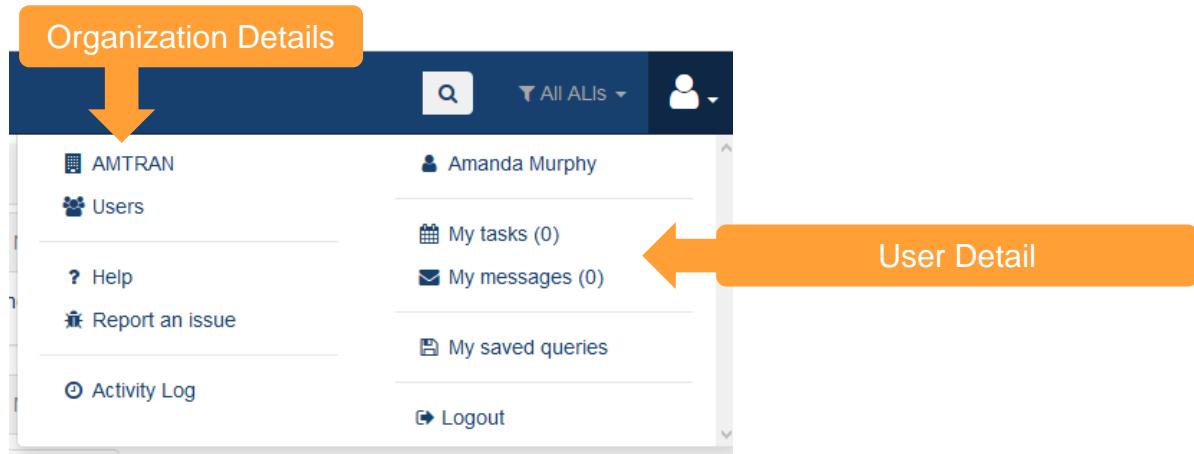
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

**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**

Capital Planning Tool (QA) Home > Organizations > Transit Operators > AMTRAN

Actions ▾

Type Name: AMTNA Metro Transit  
Short Name: AMTRAN  
External ID: 123456789  
Address: 3301 Fifth Avenue Altoona, PA, 16602  
Technical Contact: Not Set  
Subrecipient Number: XXXXXXXXX

Add a user

Asset Summary Staff Services Governance Planning Partners NTD Reports Capital Projects Buckets Map

Organization Details

| 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) Home > Users > My Profile

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

Amanda Murphy

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

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

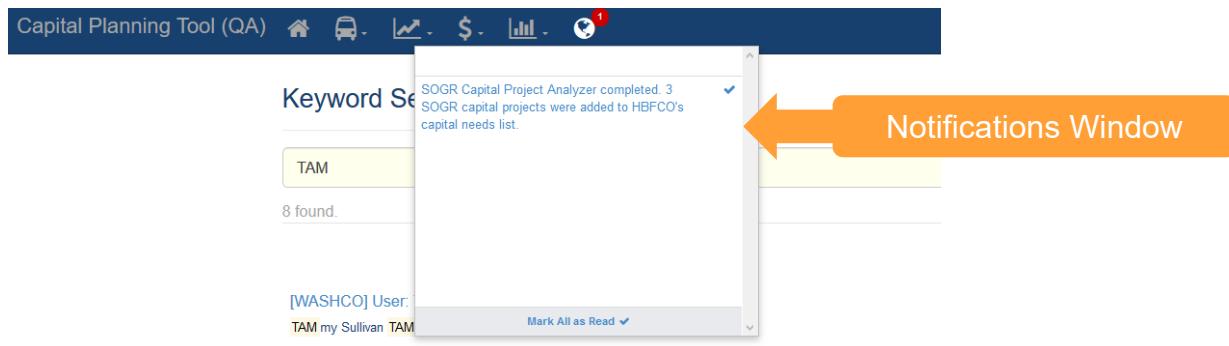
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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   |
| <input type="text"/>   | <input type="text"/> |
| * Comments   |                      |
| <input type="text"/><br>Please provide as much detail as you can...                              |                      |
| <a href="#" style="background-color: #005a7b; color: white; padding: 5px 10px;">Create Issue</a> |                      |

## 3.7 Notifications

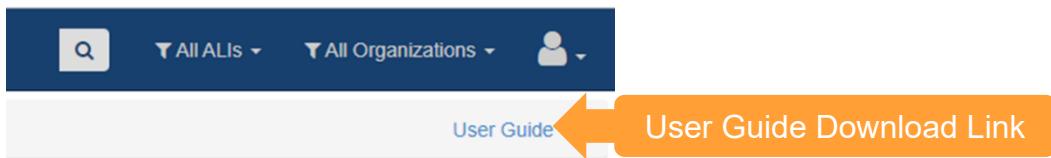
The notifications dropdown alerts you when there's activity in the system that you should be aware of. The globe at the top of the page will display a number with the count of "unread" notifications since your last check. Clicking on a notification item will take you to the change and mark the notification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

**Figure 22 User Guide**





## 4.0 Asset Inventory

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

**Figure 23 Asset Inventory Dropdown**

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Bus, Map, Money, and Tools. Below the navigation bar is a sidebar titled "Asset Summary" with a table showing asset categories and counts. To the right of the sidebar is a large, semi-transparent dropdown menu titled "Asset Inventory Dropdown". This dropdown menu lists various asset management options, each with a small icon and a numerical value. An orange callout bubble with an arrow points from the text "Asset Inventory Dropdown" in the caption to the title of the dropdown menu.

| Org   | Category : Class                                | Count |
|-------|---|-------|
| SFRTA | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 1,428 |
| SFRTA | Revenue Vehicles : Rail Cars                    | 3,825 |
| SFRTA | Equipment : Service Vehicles (Non-Revenue)      | 4,181 |
| SFRTA | Equipment : Capital Equipment                   | 5,404 |
| SFRTA | Facilities : Administration                     | 6,617 |
| SFRTA | Facilities : Maintenance                        | 1,965 |
| SFRTA | Facilities : Passenger                          | 2,365 |
| SFRTA | Facilities : Parking                            | 3,632 |
| SFRTA | Infrastructure : Guideway                       | 4,000 |
| SFRTA | Infrastructure : Power & Signal                 | 3,620 |
| SFRTA | Infrastructure : Track                          |       |

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

### 4.1 Add an Asset

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

**Figure 24 Adding an Asset**

This screenshot is similar to Figure 23, showing the TransAM Asset Manager (Staging) interface with the Asset Inventory Dropdown menu open. An orange callout bubble with an arrow points from the text "Add an Asset" in the caption to the "+ Add Asset" option in the dropdown menu.

| Org   | Category : Class                                | Count |
|-------|---|-------|
| SFRTA | Revenue Vehicles : Buses (Rubber Tire Vehicles) | 1,428 |
| SFRTA | Revenue Vehicles : Rail Cars                    | 3,825 |
| SFRTA | Equipment : Service Vehicles (Non-Revenue)      | 4,181 |
| SFRTA | Equipment : Capital Equipment                   | 5,404 |
| SFRTA | Facilities : Administration                     | 6,617 |
| SFRTA | Facilities : Maintenance                        | 1,965 |
| SFRTA | Facilities : Passenger                          | 2,365 |
| SFRTA | Facilities : Parking                            | 3,632 |
| SFRTA | Infrastructure : Guideway                       | 4,000 |
| SFRTA | Infrastructure : Power & Signal                 | 3,620 |
| SFRTA | Infrastructure : Track                          |       |

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

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

## Figure 25 Select the Organization and Asset Class

Capital Planning Tool (QA)      

Home > Add Asset

## New Asset

\* Organization

Select organization...

\* FTA Asset Class

Select asset class...

**Create New Asset**

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

## Figure 26 Adding Asset Required Details

Capital Planning Tool (QA)      

 All Aliis  

Home

Required Fields Recommended Fields

Organization

\* Organization  
Altoona Metro Transit

Service Status

\* Service Status

Identification & Classification

\* Vehicle Identification Number (VIN)

\* Asset ID

\* Class  
Buses (Rubber Tire Vehicles)

\* Type

\* Subtype

\* Estimated Service Life (ESL) Category

Funding

Characteristics

\* Manufacturer  
Manufacturer (Other)

\* Model  
Model (Other)

\* Year of Manufacture

\* Fuel Type  
Fuel Type (Other)

Dual Fuel Type

\* Length  
Length Units

\* Seating Capacity (ambulatory)

Any field on the required tab must be filled out

**Figure 27 Add the Asset and Go To The New Record**

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

## 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 28 Existing Assets**

Click Asset Class to access a list of assets

| Type                            | Avg. Age | Due Date  | Agency | Num. Projects |
|---------------------------------|----------|-----------|--------|---------------|
| ACTS Revenue Vehicles           | 2.3      | 5/29/2018 | ACTS   | 5,793         |
| ACTS Support Facilities         | 2.0      | 7/31/2018 | AMTRAN | 7,751         |
| ACTS Guideway                   | 0.0      | \$0       | ATA    | \$0           |
| ACTS Power & Signal             | 0.0      | \$0       | BARTA  | \$0           |
| ACTS Track                      | 0.0      | \$0       | BCT    | \$0           |
| AMTRAN Revenue Vehicles         | 12.0     | 2/07/2019 | BCTA   | 2,076         |
| AMTRAN Stations/Stops/Terminals | 11.0     | 3/06/2019 | BMC    | 0,465         |
| AMTRAN Support Facilities       | 29.4     | 3/09/2019 | BSS    | 3,902         |
| AMTRAN Support Vehicles         | 4.9      | 3/12/2019 | BTA    | 2,534         |
| AMTRAN Maintenance Equipment    | 12.9     | 3/15/2019 | BUTLER | 9,698         |
| AMTRAN Facility Equipment       | 30.2     | 3/19/2019 | CARBON | 7,301         |
| AMTRAN IT Equipment             | 6.6      | 3/20/2019 | CARS   | \$20,278      |
| AMTRAN Office Equipment         | 14.1     | 3/20/2019 | CAT    | \$112,098     |
| AMTRAN Communications Equipment | 7.5      | 3/21/2019 | CATA*  | \$17,292      |
| AMTRAN Signals/Signs            | 6.8      | 3/21/2019 | CCTA   | \$1,790,766   |
| AMTRAN Guideway                 | 0.0      | 3/21/2019 | CHESSR | \$775,479     |
| AMTRAN Power & Signal           | 0.0      | 3/21/2019 | CLARCO | \$34,504      |
| AMTRAN Track                    | 0.0      | 3/21/2019 | CNTRCO | \$0           |

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

**Figure 29 Existing Asset Interface**

| Asset ID     | Organization | VIN               | Manufacturer                 | Model         | Year | Class                        | Type    | Subtype       | Status                           | ESL | Last Life Cycle Action    | Life Cycle Action Date |
|--------------|--------------|-------------------|------------------------------|---------------|------|------------------------------|---------|---------------|----------------------------------|-----|---------------------------|------------------------|
| #1701        | CAT          | 15GBB2713H3189913 | GIL - Gillig Corporation     | 35' Low Floor | 2017 | Buses (Rubber Tire Vehicles) | Bus     | Bus Std 35 FT | In Service                       |     | Service status            | 2/26/2018              |
| #271         | CAT          | 1FDFE4FS6HDC19987 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Maintenance history       | 10/2/2018              |
| #272         | CAT          | 1FDFE4FS8HDC16988 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #273         | CAT          | 1FDFE4FSXHDC19992 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #274         | CAT          | 1FDFE4FS6HDC19990 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #275         | CAT          | 1FDFE4FS8HDC19991 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #276         | CAT          | 1FDFE4FSXHDC19989 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #277         | CAT          | 1FDFE4FS1HDC19993 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #278         | CAT          | 1FDFE4FS3HDC19994 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #279         | CAT          | 1FDFE4FS5HDC19995 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #280         | CAT          | 1FDFE4FS7HDC19996 | FRD - Ford Motor Corporation | Champion      | 2015 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #281         | CAT          | 1FDFE4FS9HDC19997 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #282         | CAT          | 1FDFE4FS0HDC19998 | FRD - Ford Motor Corporation | Champion      | 2017 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 1/18/2018              |
| #800         | LCTA         | 15GGB311J3190014  | GIL - Gillig Corporation     | CNG LOW FLOOR | 2018 | Buses (Rubber Tire Vehicles) | Bus     | Bus Std 35 FT | No Service Status Event Recorded | -   | -                         | -                      |
| #801         | LCTA         | 15GGB311J3190015  | GIL - Gillig Corporation     | CNG LOW FLOOR | 2018 | Buses (Rubber Tire Vehicles) | Bus     | Bus Std 35 FT | No Service Status Event Recorded | -   | -                         | -                      |
| *001         | LCTA         | 1FDFE4FS8HDC54954 | FRD - Ford Motor Corporation | Challenger    | 2016 | Buses (Rubber Tire Vehicles) | Cutaway | Bus < 30 FT   | In Service                       |     | Mileage                   | 8/2/2018               |
| *002         | LCTA         | 1FDFE4FSXHDC54955 | 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 30 Asset Record: Highlights**

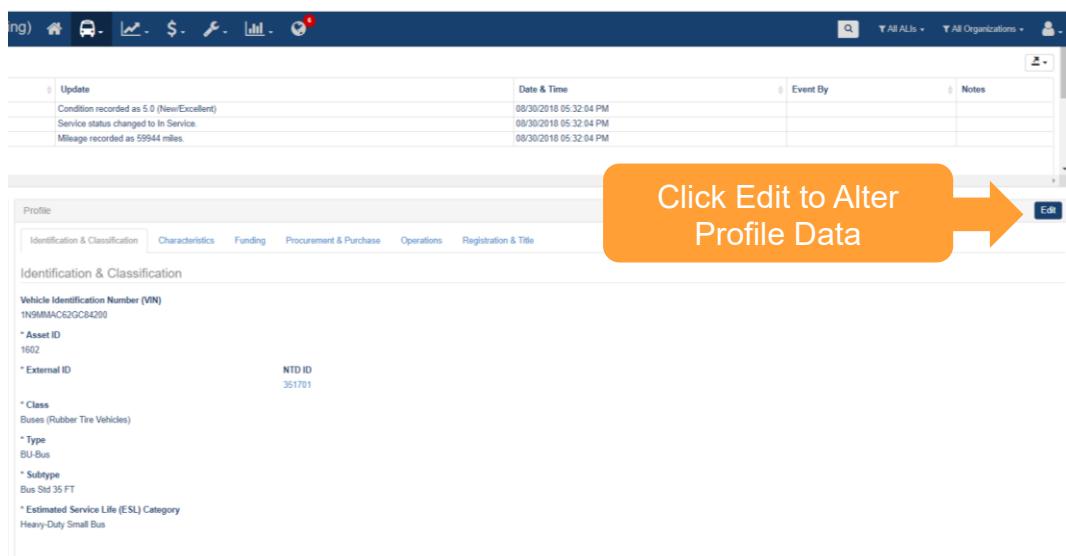
| Event                 | Date      | Update                                    | Notes |
|-----------------------|-----------|---|-------|
| Condition             | 2/26/2018 | Condition recorded as 5.0 (New/Excellent) |       |
| Service Status Update | 2/26/2018 | Service status changed to In Service.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

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

**Figure 31 Asset Record: Profile and Summary**

### 4.3 Editing or Updating Existing Asset Profile Data

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

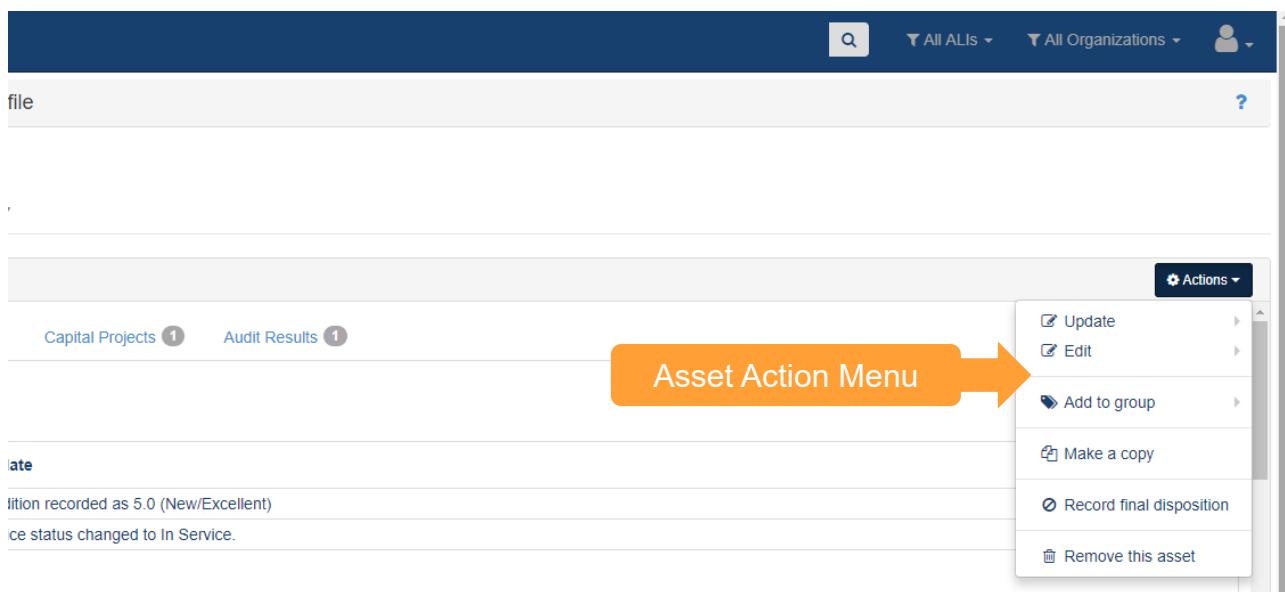
**Figure 32 Editing the Profile of an Existing Asset**

## 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 33 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 34 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 over the table, containing two buttons: '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, there's 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 bar chart titled 'Annual Inventory Update Results' showing completion percentages for different asset types across agencies.

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

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

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

**Figure 35 Early Disposition Requests**

The screenshot shows the Capital Planning Tool (QA) interface with the title 'Home > Early disposition proposed'. At the top, there are buttons for 'Export All', 'Approve', and 'Reject'. An orange arrow points from the text 'Approve or Reject requests' to the 'Approve' button. Below these buttons 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). The table has a header row with column headers: Agency, Type, Asset Tag, Description, Parent, Location, Status, Age, Co.

## 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 36 Bulk Updates**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary'. The main area displays a table of asset data with columns for Type, Avg. Age, and various financial metrics. On the right, there's a sidebar with sections like 'Revenue Vehicles', 'Equipment', 'Facilities', 'Infrastructure', 'Groups', 'Action Events', 'Map', and 'Manage Overlay Services'. A prominent orange callout box highlights the 'Bulk Updates' option under the 'Groups' section. Another orange arrow points from the 'Bulk Updates' label to the 'Bulk Updates' button in the bottom right corner of the main content area.

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 37 Bulk Update Tools**

The screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' (highlighted with an orange arrow), 'Upload a Template', and 'Filter Status'. Below this is a table with columns: Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The table lists three entries: PIKECO (File Name: pikeco\_transit\_inventory\_updates\_file\_handler\_2018-04-17.xlsx, Content: Inventory Updates, Uploaded by Toni Marino, Status: Complete, Processed: 30, Added: 30), END (File Name: END.xlsx, Content: Inventory Updates, Uploaded by BETHANY JONES, Status: Complete, Processed: 84, Added: 84), and WBT (File Name: IT\_EQUIPMENT\_UPDATE.xlsx, Content: Inventory Updates, Uploaded by BETHANY JONES, Status: Complete, Processed: 84, Added: 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 38 Bulk Update Details

Choose these parameters

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

## Figure 39 Bulk Update Spreadsheet Download

Success

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

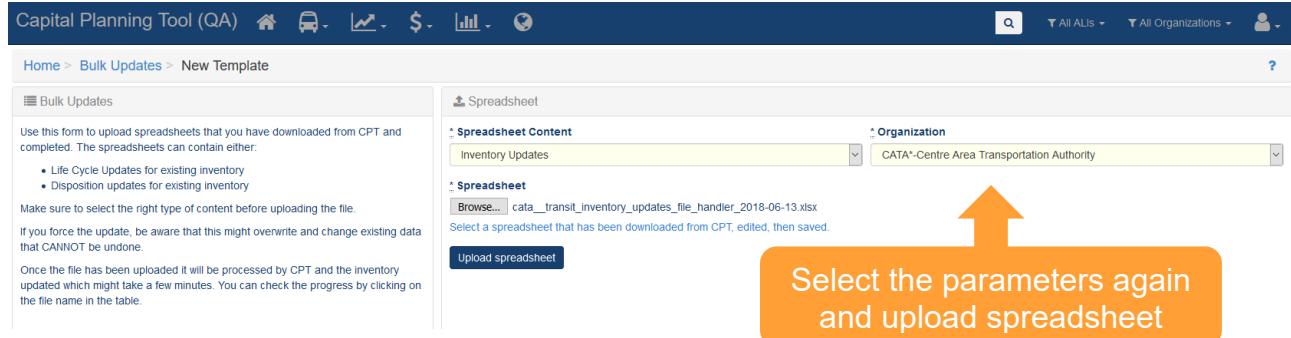
[Download File](#)

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

## Figure 40 Bulk Update Spreadsheet

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 41 Bulk Update Upload**



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

**Figure 42 Bulk Upload Processing**

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

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

**Figure 43 Bulk Update Edit**

Capital Planning Tool (QA)

Home > Bulk Updates > cata\_\_transit\_inventory\_updates\_file\_handler\_2018-06-13.xlsx

**File Upload**

Name: cata\_\_transit\_inventory\_updates\_file\_handler\_2018-06-13.xlsx  
Content: Inventory  
Uploaded By: Elizabeth  
Upload Time: 04:36 PM 06/13/2018  
Status: Complete

**Actions**

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

**Details**

Processing   Process Log   Updates

Time Started: 04:36 PM 06/13/2018  
Time Complete: 04:36 PM 06/13/2018  
Rows Processed: 127  
Num. Rows Added: 0  
Num. Rows Skipped: 0  
Num. Rows Replaced: 0  
Num. Rows Failed: 0

## 4.7 Query

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

**Figure 44 Asset Query**

TransAM Asset Manager (Staging)

Home

Asset Summary All

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

**Query your Assets**

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

Capital Projects  
Agency SFRTA

Audit Summary

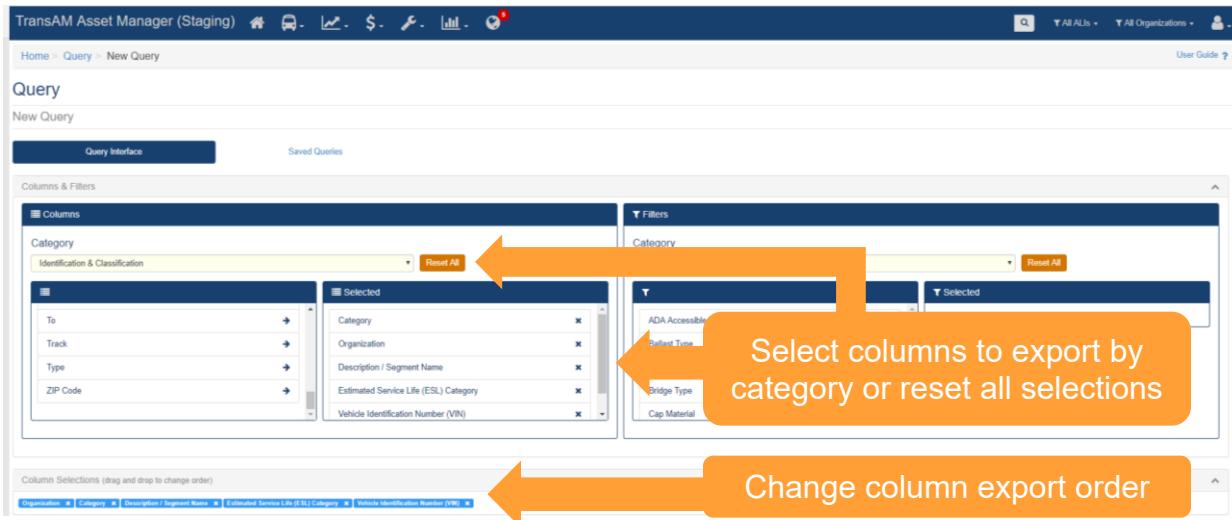
User Activity

| 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

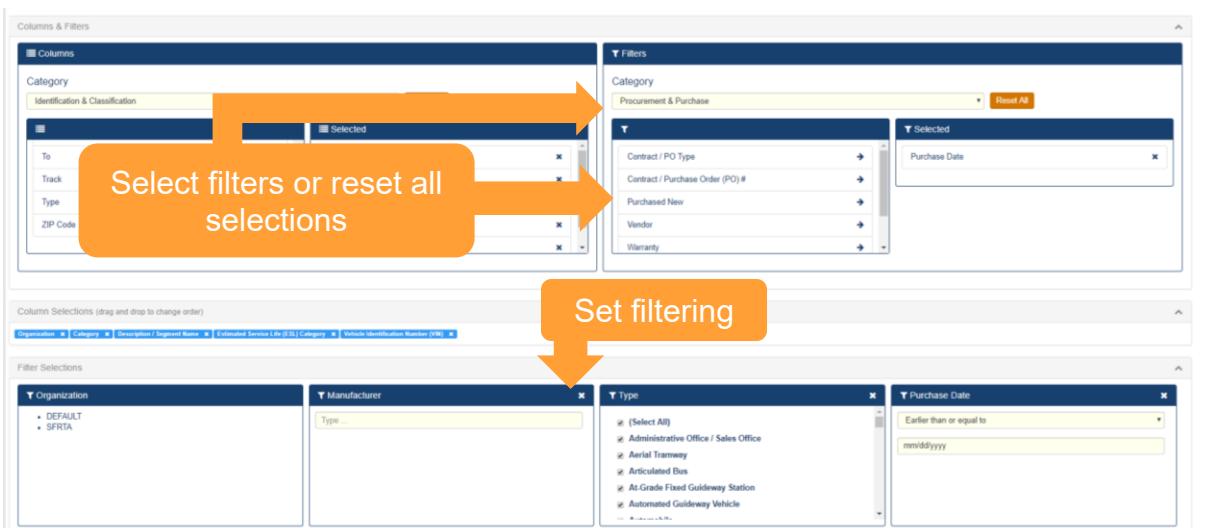
"x" of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

**Figure 45 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.

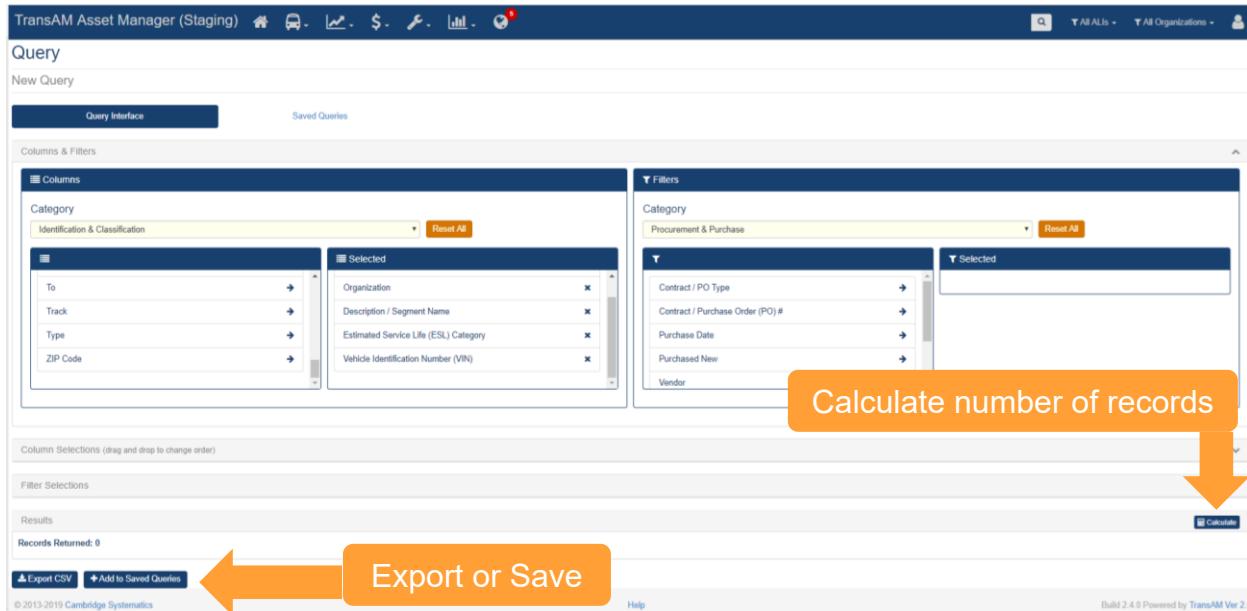
**Figure 46 Filter Selection**



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.

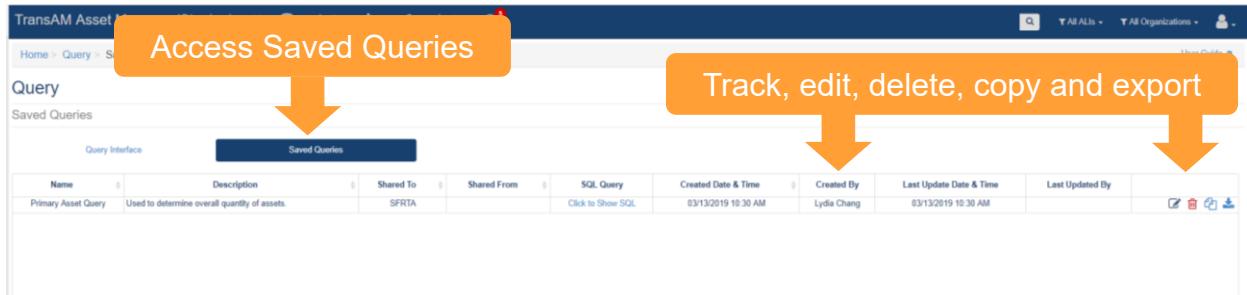
**Figure 47 Calculate, Export or Save**



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 48 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 49 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'. An orange arrow points from the text 'Groups' to the 'Groups' option in the menu.

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

**Figure 50 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. A large orange arrow points to a button labeled 'Add an Asset to a Group' in a callout box. To the right of the profile details, there's a 'Actions' dropdown menu with options like 'Update', 'Edit', 'Add to group', 'Make a copy', 'Record final disposition', and 'Remove this asset'. The bottom of the screen shows the 'Asset Summary' and 'Profile' sections, including identification and classification details like VIN and Asset ID.



## 5.0 Maintenance

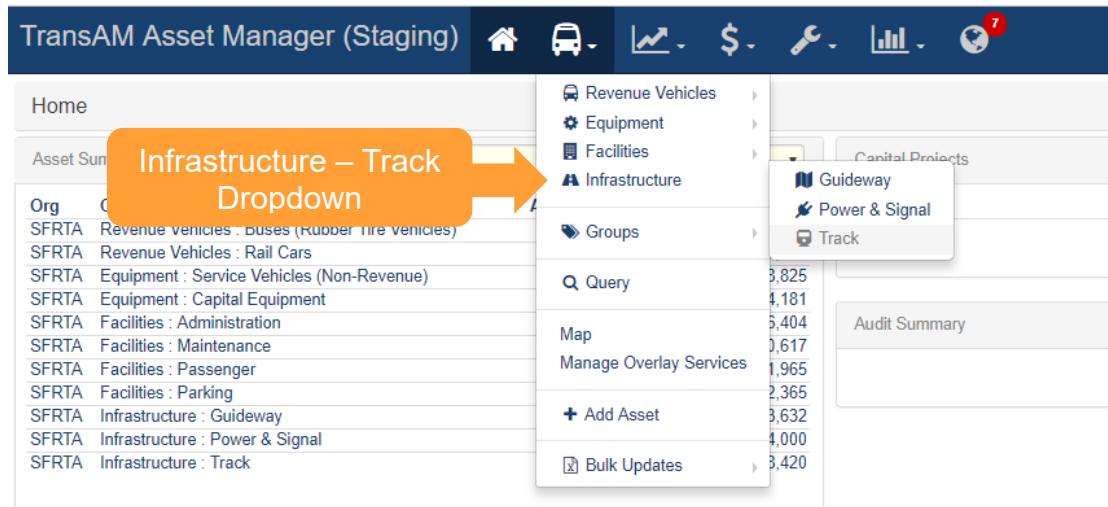
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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



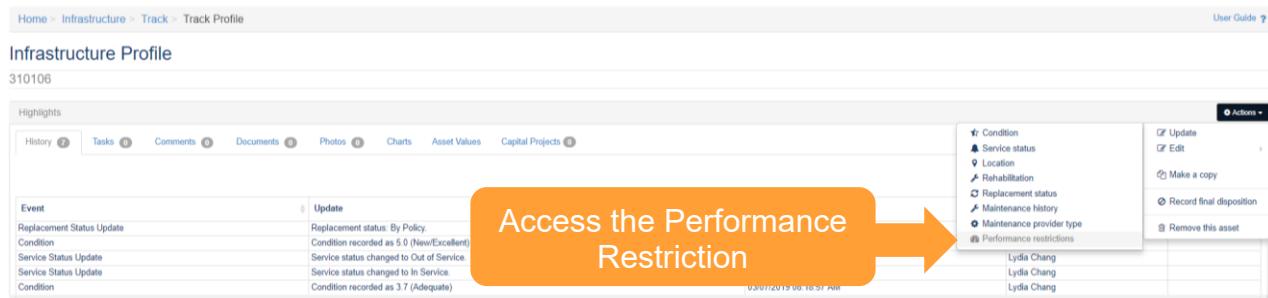
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

**Figure 52 Existing Asset Interface : Infrastructure - Track**

The screenshot shows the 'Infrastructure' section of the asset interface, specifically for 'All Track' assets. A table lists 275 rows of asset data. An orange callout bubble points to the 'Asset ID' column header, indicating where to click to access the infrastructure track record. The table includes columns for Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. The status column for most entries shows 'In Service'.

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

**Figure 53 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 54 Performance Restriction Lifecycle Event**

This screenshot shows the 'Performance restrictions' form. It includes fields for Speed Restriction (79.0 mph), Segment Unit (Track 2), and linear coordinates (From: SX 971.9, To: SX 975.3 miles). The 'Notes' panel provides instructions for reporting performance restrictions. At the bottom, a large orange callout points to the 'Update Performance Restrictions' button.

| 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<br><input checked="" type="radio"/> Until Removed |  |
| * Segment Unit   |        | Track  |  |
| <input type="radio"/> Marker Posts<br><input type="radio"/> Lat / Long<br><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"/>   |        |  |  |

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 55 Maintenance Dropdown**

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Assets, Reports, and Help. Below the navigation bar, a dropdown menu is open, labeled "Maintenance Dropdown". The 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 56 Performance Restriction Management**

The screenshot shows a table titled "Performance Restrictions" with a heading "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, with some entries having "Closeout" buttons in the Status column. A footer 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 | <span>Closeout</span> |
| 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 | <span>Closeout</span> |
| 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 | <span>Closeout</span> |
| Active | 03/12/2019 11:19 AM | 03/19/2019 11:19 PM | 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 | 03/19/2019 11:19 PM | Lydia Chang  | Active | <span>Closeout</span> |
| 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 | <span>Closeout</span> |
| Active | 03/13/2019 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 | <span>Closeout</span> |
| 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 | <span>Closeout</span> |



## 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 57 Policies Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, Policies, Capital Projects, Project Planner, and SOGR Capital Project Analyzer. A large orange arrow points from the text "Policies Dropdown" to the "Policies" icon in the navigation bar. Below the navigation bar is a table titled "Asset Summary" showing various asset types, average age, and count. To the right of the table is a detailed view of "Capital Projects" for the "FY 18-19" period, listing projects by agency, number of projects, and cost. At the bottom left is a "My Tasks" section with a calendar icon.

| 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 |
| ATA    | 11            | \$2,156,774 |
| BARTA  | 2             | \$8,142,424 |
| BCT    | 3             | \$1,843,909 |
| BCTA   | 3             | \$236,000   |
| BMC    | 1             | \$97,020    |
| BSS    | 2             | \$528,432   |
| BTA    | 7             | \$9,003,734 |
| BUTLER | 1             | \$100,000   |
| CARBON | 1             | \$570,000   |
| CARS   | 1             | \$134,239   |
| CAT    | 4             | \$6,555,761 |

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

**Figure 58 Policy Rule Sets**

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

| Policy Rule Set                         | Description                          |
|---|--------------------------------------|
| Asset Replacement/Rehabilitation Policy | Asset Replacement/Rehabilitation ... |
| TAM Policy                              | 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 59 Asset Replacement/Rehabilitation Policy**

The screenshot shows the TransAM Capital Planning Tool (QA) interface. In the top navigation bar, there are icons for Home, Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. A dropdown menu is open under the Policies icon, showing options like Asset Replacement/Rehabilitation Policy and TAM Policy. An orange arrow points from a callout bubble labeled "Asset Replacement/Rehabilitation Selection" towards the policy dropdown. The main content area displays asset summary data for various categories like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc., followed by a table of assets for BARTA, BCT, BCTA, BMC, BSS, BTA, BUTLER, CARBON, CARS, and CAT. At the bottom left is a "My Tasks" section with a calendar icon, and at the bottom right is an "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 60 Asset Replacement/Rehabilitation Policy Filters**

The screenshot shows the Asset Replacement/Rehabilitation Policy page. At the top, there's a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. Below the header, there's a search bar and a user profile icon. The main content area is titled "Asset Replacement/Rehabilitation Policy". It features a "Filters" section with two dropdowns: "Organization" set to "BPT-PennDOT Bureau of Public Transportation" and "Policy Year" set to "FY 2017 Statewide Transit Policy (Current)". Below these are sections for "Policy Rules", "Condition Threshold", and "Actions". The "Policy Rules" section includes fields 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). An orange callout bubble highlights the "Organization Filter" and "Policy Year" dropdowns, with orange arrows pointing to them from the labels.

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 61 Policy Rules

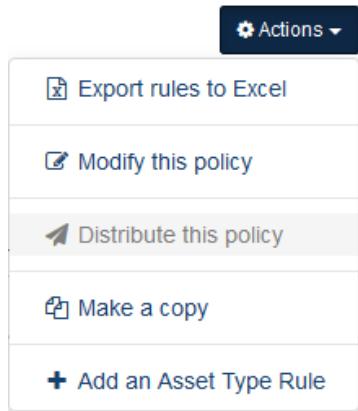
The screenshot shows the 'Policy Rules' page with the following details:

- Policy Owner:** PennDOT Bureau of Public Transportation
- Description:** FY 2017 Statewide Transit Policy
- Status:** Active
- 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.

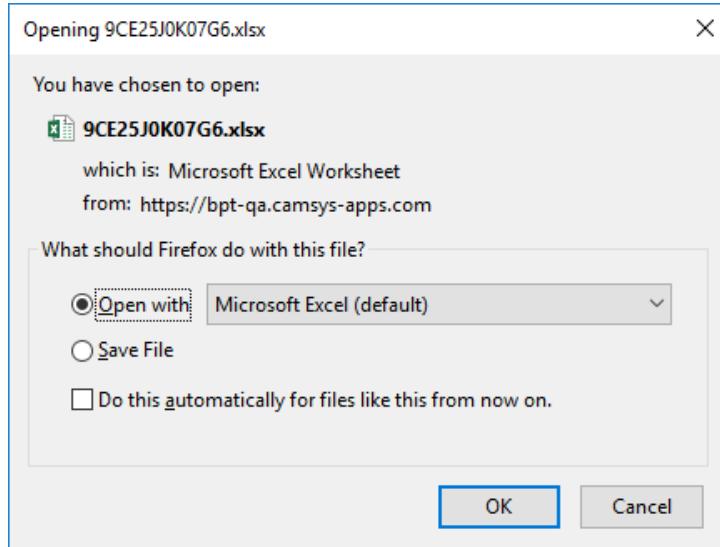
The Actions button will display a list of options as shown.

## Figure 62 Policy Rules Actions Dropdown



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

## Figure 63 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 64 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**

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

**Figure 65 Distribute Policy**

## Distribute Policy

**Warning!**

The parent policy will be distributed to the children policies. After distribution, agencies will need to apply their policies and re-run the SOGR builder. If you would like to apply or build SOGR projects for all agencies at once, please contact Cambridge Systematics.

**Run...**

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

**Figure 66 Copy Organization Policy Dialog**

## Update Policy

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

\* **Condition Threshold**  
2.5

\* **Depreciation Calculator**  
Straight Line

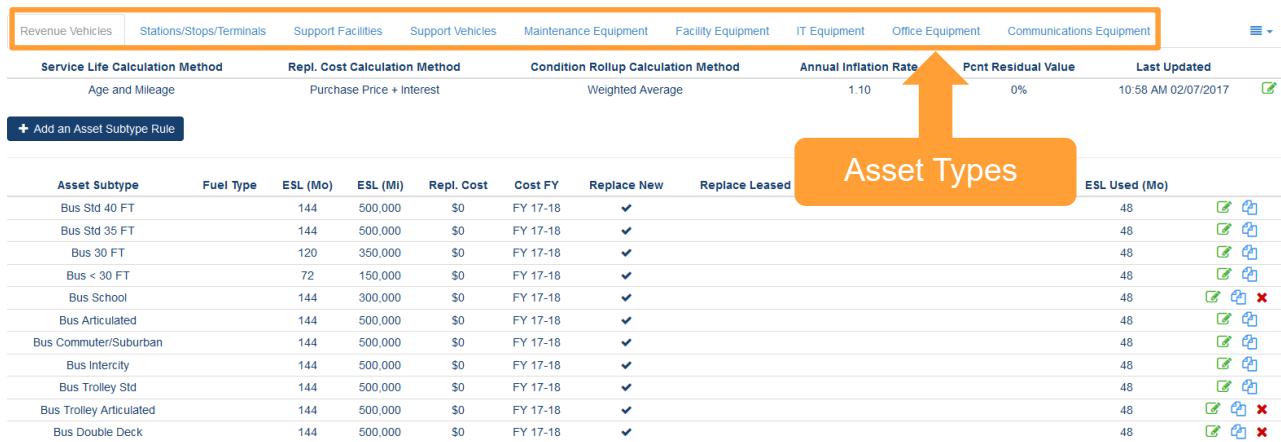
\* **Depreciation Interval**  
Annually

**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**



The screenshot shows a table of asset subtypes under the 'Asset Types' tab. The table has columns for Asset Subtype, Fuel Type, ESL (Mo), ESL (Mi), Repl. Cost, Cost FY, Replace New, Replace Leased, and ESL Used (Mo). An orange callout points to the 'Asset Types' tab at the top of the table.

| 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

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

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

## Figure 70 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

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

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

## Figure 71 Edit Icon



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

**Figure 72 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   |                                     | * Pcnt Residual Value             |
| 1.1   |                                     | 0                                 |
|   |                                     | * Condition Rollup Weight         |
|   |                                     | 0                                 |
| <input type="button" value="Save"/> <input type="button" value="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 73 Asset Type and Asset Subtype rules**

| Asset Subtype Rules   |                          |                    |                  |                       |                    |              |                |                                 |                               |                                     |                       |               |                     |            |         |             |                |              |                   |               |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |           |    |     |         |     |          |   |  |  |  |    |             |    |    |         |     |          |   |  |  |  |    |  |
|---|--------------------------|--------------------|------------------|-----------------------|--------------------|--------------|----------------|---------------------------------|-------------------------------|-------------------------------------|-----------------------|---------------|---------------------|------------|---------|-------------|----------------|--------------|-------------------|---------------|---------------|----|-----|---------|-----|----------|---|--|--|--|----|---------------|----|-----|---------|-----|----------|---|--|--|--|----|---------------|----|-----|---------|-----|----------|---|--|--|--|----|-----------|----|-----|---------|-----|----------|---|--|--|--|----|-------------|----|----|---------|-----|----------|---|--|--|--|----|--|
| Revenue Vehicles  | Stations/Stops/Terminals | Support Facilities | Support Vehicles | Maintenance Equipment | Facility Equipment | IT Equipment | Office Equip   | Service Life Calculation Method | Repl. Cost Calculation Method | Condition Rollup Calculation Method | Annual Inflation Rate | Pcnt Residual | Last Updated        |            |         |             |                |              |                   |               |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |           |    |     |         |     |          |   |  |  |  |    |             |    |    |         |     |          |   |  |  |  |    |  |
|   |                          |                    |                  |                       |                    |              |                | Age and Mileage                 | Purchase Price + Interest     | Weighted Average                    | 1.10                  | 0%            | 10:41 AM 09/10/2016 |            |         |             |                |              |                   |               |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |           |    |     |         |     |          |   |  |  |  |    |             |    |    |         |     |          |   |  |  |  |    |  |
| <table border="1"> <thead> <tr> <th>Asset Subtype</th> <th>Fuel Type</th> <th>ESL (Mo)</th> <th>ESL (M)</th> <th>Repl. Cost</th> <th>Cost FY</th> <th>Replace New</th> <th>Replace Leased</th> <th>Replace With</th> <th>Replace Fuel Type</th> <th>ESL Used (Mo)</th> </tr> </thead> <tbody> <tr> <td>Bus Std 35 FT</td> <td>DF</td> <td>144</td> <td>500,000</td> <td>\$0</td> <td>FY 17-18</td> <td>✓</td> <td></td> <td></td> <td></td> <td>48</td> </tr> <tr> <td>Bus Std 35 FT</td> <td>BD</td> <td>144</td> <td>500,000</td> <td>\$0</td> <td>FY 17-18</td> <td>✓</td> <td></td> <td></td> <td></td> <td>48</td> </tr> <tr> <td>Bus Std 35 FT</td> <td>HD</td> <td>144</td> <td>500,000</td> <td>\$0</td> <td>FY 17-18</td> <td>✓</td> <td></td> <td></td> <td></td> <td>48</td> </tr> <tr> <td>Bus 30 FT</td> <td>DF</td> <td>120</td> <td>350,000</td> <td>\$0</td> <td>FY 17-18</td> <td>✓</td> <td></td> <td></td> <td></td> <td>48</td> </tr> <tr> <td>Bus &lt; 30 FT</td> <td>DF</td> <td>60</td> <td>150,000</td> <td>\$0</td> <td>FY 17-18</td> <td>✓</td> <td></td> <td></td> <td></td> <td>48</td> </tr> </tbody> </table> |                          |                    |                  |                       |                    |              |                |                                 |                               | 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 |  |
| 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                                  |                       |               |                     |            |         |             |                |              |                   |               |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |               |    |     |         |     |          |   |  |  |  |    |           |    |     |         |     |          |   |  |  |  |    |             |    |    |         |     |          |   |  |  |  |    |  |

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

**Figure 74 Add an Asset Subtype Rule Icon**



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

**Figure 75 Add an Asset Subtype Rule Dialog**

Add an Asset Subtype Rule

Replacement

**Asset Subtype**  
New Subtype

**New Asset Subtype Name**

**New Asset Subtype Description**

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

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

Replace Asset Subtype Replace Fuel Type

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

\* Engineering Design Code \* Rehabilitation Code

**Save** **Cancel**

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

**Figure 76 Modify Asset Subtype Rule**

Modify Rule: Guideway: At-Grade

Replacement

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

\* ESL Used (Mo) Lease Length Months  
0 0

\* Purchase Replacement \* Lease Replacement Code  
Code 12.26.06  
12.22.06

\* 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 77 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 78 TAM Policy Dropdown Menu Selection**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Dollar Sign, and a globe. Below the navigation bar is a table titled "Asset Summary" with columns for Type, Avg. Age, Count, Cost, and Book Value. To the right of the table is a sidebar titled "Policies" which includes links for Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. A large orange callout bubble points to the "TAM Policy" link in the sidebar, with the text "TAM Policy Selection" inside it. Further down the page is a table titled "Num. Projects" and "Cost" with several rows of data, and a sidebar on the right containing "No notice:" and "My Mess" 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.

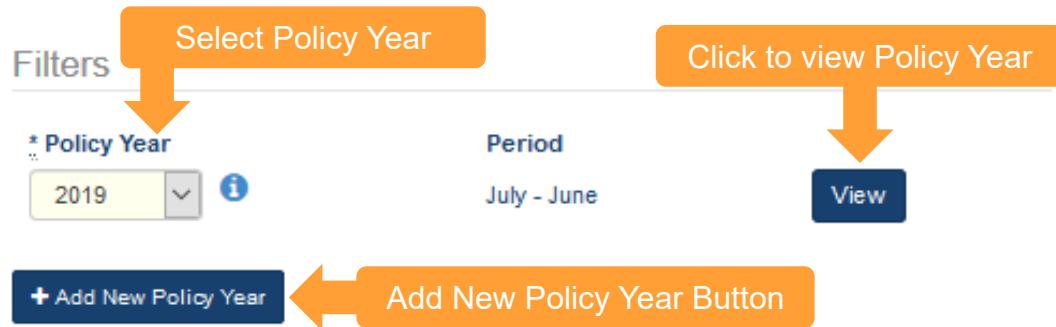
**Figure 79 TAM Policy Group Management**

The screenshot shows the "TAM Policy" section of the Capital Planning Tool (QA). At the top, there is a breadcrumb trail: Home > Policies > TAM Policy > Group Management. Below the breadcrumb trail is a header with tabs for "Group Management" (which is highlighted with an orange arrow) and "Policy Overview". Under the "Group Management" tab, there is a "Filters" section with dropdown menus for "Policy Year" (set to 2019) and "Period" (set to July - June), and a "View" button. There is also a "Add New Policy Year" button. The main area displays a table with columns for "Name", "Type", "Count", "Cost", and "Book Value".

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

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

**Figure 80 TAM Policy Year**



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

**Figure 81 Add New TAM Policy Year**

The screenshot shows a dialog box titled 'TAM Policy' with a close button 'X'. The title bar says 'Add New Policy Year'. Inside, there's a field labeled '\* Policy Year' with '2022' selected. Next to it is a 'Period' field set to 'July - June'. Below these is a checkbox labeled '\* Copy Groups From Previous Policy Year' with the 'Yes' radio button selected. A callout bubble contains the text: 'Copying groups from the previous year, will save you the effort of recreating groups and performance measures'. At the bottom are 'Save' and 'Cancel' buttons.

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

**Figure 82 Group Management Period and Year**

Group Management : 2019 : July - June



| Group Name       | TAM Group Lead   | Organizations        | Asset Categories                            | Status      |
|------------------|------------------|----------------------|---|-------------|
| test             | Nicholas Baldwin | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Distributed |
| Section 5310 TAM | Elizabeth Bonini | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Distributed |
| Section 5311     | Elizabeth Bonini | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Distributed |

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

**Figure 83 Add Group Button**

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

**Figure 84 Add TAM Group Dialog**

TAM Group

Add Group

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

Not Selected

Search...

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

Selected

**\* Asset Categories**

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

**Figure 85 Add TAM Group Dialog  
With Selections**

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

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

**Figure 86 Add TAM Group  
Selections, Asset Categories**

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

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

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

**Figure 87 TAM Group Mangement Status**

Group Management : 2022 : July - June

+ Add Group

| Group Name | TAM Group Lead   | Organizations        | Asset Categories                            | Status      |
|------------|------------------|----------------------|---|-------------|
| New Group  | Lydia Chang      | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Inactive    |
| 5311       | Nicholas Baldwin | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Distributed |

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

**Figure 88 TAM Policy Group Metrics**

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

TAM Policy

Group Management **Group Metrics** Performance Measures

Filters

\* Policy Year: 2021 [i](#) Period: July - June \* Group Name: New Group [View](#)

Select Policy Year, Group Name and click View

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

## Figure 89 Editable and Locked Assets

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

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

## Figure 90 Asset Type Percentage Settings

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

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

**Figure 91 Distribute TAM Policy**

TAM Policy

Group Management   Group Metrics   Performance Measures

Filters

|                       |                       |                           |                      |
|-----------------------|-----------------------|---------------------------|----------------------|
| * Policy Year<br>2018 | Period<br>July - June | * Group Name<br>New Group | <a href="#">View</a> |
|-----------------------|-----------------------|---------------------------|----------------------|

Group Metrics : 2018 : July - June : New Group

| Asset Category   | Group Name | Group Status   | Organizations        | Copied From Previous Year |
|------------------|------------|----------------|----------------------|---------------------------|
| Revenue Vehicles | New Group  | In Development | <a href="#">View</a> | No                        |

Revenue Vehicles

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

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

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

**Figure 92 Distributed TAM Policy**

Capital Planning Tool (QA)   [Home](#)   [Bus](#)   [Line Graph](#)   [Dollar Sign](#)   [Bar Graph](#)   [Clock](#)

TAM Policy

Group Management   Group Metrics   Performance Measures

Filters

|                       |                       |                      |
|-----------------------|-----------------------|----------------------|
| * Policy Year<br>2018 | Period<br>July - June | <a href="#">View</a> |
|-----------------------|-----------------------|----------------------|

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

| Group Name    | TAM Group Lead   | Organizations        | Asset Categories                            | Status         |
|---------------|------------------|----------------------|---|----------------|
| Group 5311    | Elizabeth Bonini | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | In Development |
| Group 5310    | Elizabeth Bonini | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | In Development |
| Example Group | Elizabeth Bonini | <a href="#">View</a> |   | In Development |
| New Group     | Lydia Chang      | <a href="#">View</a> | Revenue Vehicles<br>Equipment<br>Facilities | Distributed    |

Group Status

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

## Figure 93 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 is a 'Filters' section with dropdown menus 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 94 Policy Year Filters

The screenshot shows the 'Performance Measures' section with filters set for '2018', 'July - June', 'New Group', and 'BCTA'. 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 'Activate' button 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 95 Asset Type Percentage Settings

The screenshot shows the 'Performance Measures' section with filters set for '2018', 'July - June', 'New Group', and 'BCTA'. 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 'Activate' button in the filters section.

| Asset Category   | Group Name | Agency Status      |
|------------------|------------|--------------------|
| Revenue Vehicles | New Group  | Pending Activation |

Revenue Vehicles

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

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

**Figure 96 Activate Performance Measures**

TAM Policy

The screenshot shows the TAM Policy interface with the 'Performance Measures' tab selected. At the top, there are tabs for 'Group Management', 'Group Metrics', and 'Performance Measures'. Below the tabs are 'Filters' for 'Policy Year' (2018), 'Period' (July - June), 'Group Name' (New Group), and 'Organization' (BCTA-Beaver County Transit Authority). An 'Activate' button is located at the top right. In the center, there's a section for 'Facilities' with columns for 'Asset Class/Type', 'TERM', 'Editable/Locked', and 'Goal Pcnt'. The 'Editable' column contains dropdown menus labeled 'Editable'. An orange callout box labeled 'Activate Button' points to the 'Activate' button. The overall interface is light-colored with blue and grey accents.

| Asset Category | Group Name | Agency Status      |
|----------------|------------|--------------------|
| Facilities     | New Group  | Pending Activation |

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



## 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 97 Available Funding Programs**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area has a title 'Home > Funding Programs > All'. On the left is a table listing 'Funding Programs' with columns for Name, Source, Type, and Status. On the right, a sidebar titled 'Available Funding Programs' lists various programs like 5307, 5310, 5311, etc., each with a percentage value (e.g., 100.00%, 80.00%). At the bottom left, there's a button labeled 'Add Funding Programs'.

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

**Figure 98 Funding Program Details**

This screenshot shows a detailed view of a selected funding program. The top navigation bar is identical to Figure 97. The main content area shows a table for program \$5307 with fields for Type (Federal), Formula (✓), Inflation Rate (0.000%), Pct Match (80.000%), and Life of \$ (years) (5). To the right, a 'Details' panel is open with tabs for 'Details', 'Templates' (2), 'Buckets' (21), 'Assets' (827), 'Documents' (0), and 'Comments' (0). An orange arrow points from the 'Additional Program Information' callout towards the 'Details' panel.

## 7.2 Grants

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

**Figure 99 Grants Dropdown**

The screenshot shows the TransAM DRPT (Staging) application. At the top, there is a navigation bar with icons for Home, Asset Summary, Programs, and Grants. A large orange arrow points from the 'Grants' icon in the navigation bar down to the 'Grants' option in a dropdown menu that is open over a table. The table below displays asset data with columns for Org, Category : Class, Avg. Age, Count, and Cost. The data includes various organizations like RATS, CROSS, RRCSB, PCS, PAA, CVACL, WATA, and STJOE, listing items such as Revenue Vehicles, Equipment, and Facilities.

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

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

**Figure 100 Adding a Grant**

The screenshot shows the 'Grants' page in the TransAM DRPT (Staging) application. It features a table of existing grants with columns for Grant Number, Source, Program, Grant Year, Owner, Contributor, Legislative Authorization, Date of Award, Date of Most Recent Amendment, Status, Last Update By, and Last Update Date. An orange arrow points from the 'Add a Grant' button at the bottom right of the table area. The 'Add a Grant' button is highlighted with an orange box.

| Grant Number         | Source  | Program         | Grant Year | Owner | Contributor | Legislative Authorization  | Date of Award | Date of Most Recent Amendment | Status         | Last Update By | Last Update Date |
|----------------------|---------|-----------------|------------|-------|-------------|----------------------------|---------------|-------------------------------|----------------|----------------|------------------|
| VA-23-12-2013-01     | Federal | 5311            | 2018       | DRPT  | ADCM        | MAP-21                     | 12/04/2018    | 03/07/2019                    | Open           | Lydia Chang    | 03/07/2019 01:11 |
| State Cap 2019       | State   | Act 3 BSG       | 2018       | DRPT  | Other       | 2019 Budget                | 10/01/2018    |                               | In Development | Lydia Chang    | 03/07/2019 01:11 |
| Agency Local Capital | Local   | Unknown Program | 2018       | DRPT  | Multiple    | Local Capital Funds - 2019 | 11/07/2018    |                               | In Development | Lydia Chang    | 03/07/2019 01:22 |

**Add a Grant**

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

**Figure 101 Adding Required Details (New Grants)**

Home > Grants > New

Add Grant

Details

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

**Add Grant & Go to Grant Detail Page**

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

**Figure 102 Grants Table**

Home > Grants

Grants

Filtered

Status: In Development / Open

**Filter Viewable Grants**

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

**Export Grant Data**

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

**Figure 103 Accessing an Existing Grant**

Home > Grants

Grants

Filtered

Status: In Development / Open

**Access an Existing Grant**

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

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

## Figure 104 Editing or Updating an Existing Grant

The screenshot shows the 'Grant Profile' page for VA-23-12-2013-01. The page has tabs for Details, Apportionments, Assets, Amendments, and History. The 'Details' tab is selected. On the right side, there is a summary section with fields like 'Grant Number' (VA-23-12-2013-01), 'Source' (Federal), 'Program' (5311), 'Owner' (DRPT), 'Contributor' (ADCM), 'Method of Apportionment Structure' (Single Apportionment), 'Total Apportionment' (\$ 1,100,540), 'Grant Development Method' (Directly Generated), and 'Grant Year' (2019). At the top right, there is an 'Actions' dropdown with an 'Edit' button. An orange arrow points to the 'Edit' button with the text 'Click Edit to Alter Profile Data'.

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

## Figure 105 Managing the Lifecycle of a Grant

The screenshot shows the 'Grant Profile' page for VA-23-12-2013-01. The page has tabs for Details, Apportionments, Assets, Amendments, and History. The 'Details' tab is selected. On the right side, there is a summary section with fields like 'Grant Number' (VA-23-12-2013-01), 'Source' (Federal), 'Program' (5311), 'Owner' (DRPT), 'Contributor' (ADCM), 'Method of Apportionment Structure' (Single Apportionment), 'Total Apportionment' (\$ 1,100,540), 'Grant Development Method' (Directly Generated), and 'Grant Year' (2019). At the top right, there is an 'Actions' dropdown with a 'Close' button. An orange arrow points to the 'Close' button with the text 'Change the Status of a Grant'.

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

## Figure 106 Managing Grant Amendments

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

The screenshot shows the 'Amendments' tab selected in the navigation bar. Below it is a table with one row, showing details for an amendment numbered '01'. The table columns include 'Amendment Number', 'Grant Number', 'Comments', 'Created By', 'Created Date & Time', and 'Actions'. A large orange arrow points from the left towards the '+Add Amendment' button.

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

Showing 1 to 0 of 0 rows

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

## Figure 107 Adding Required Details (Grant Amendments)

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

Add Amendment

\* Amendment Number

\* Update Grant Number  
 Yes  
 No

\* Grant Number

Comments



## 8.0 Reports

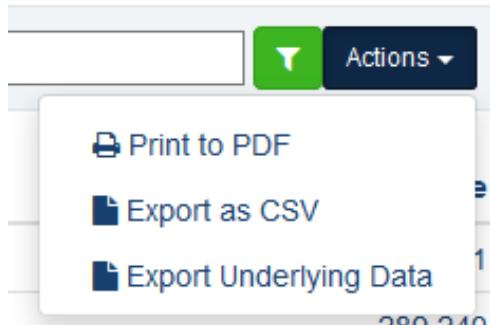
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

**Figure 108 Reports Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, and various reports. A dropdown menu labeled "Reports" is open, listing "Capital Needs Reports", "System Reports", "Planning Reports", and "NTD Reporting". An orange arrow points from the text "Reports Dropdown" to this menu. Below the menu, there is a table titled "Asset Summary" showing data for ACTS Revenue Vehicles, ACTS Support Facilities, and AMTRAN Revenue Vehicles. To the right of the table, there is a section titled "Num. Projects" and "Cost" with values for AMTRAN and ATA. In the top right corner of the main content area, there is a date range selector set to "8-19".

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 109 Report Exports**

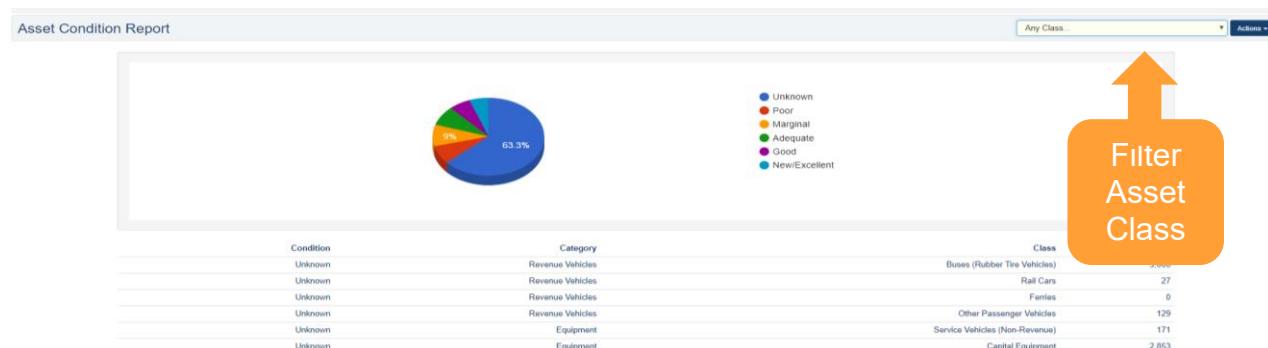


### 8.1 Inventory Reports

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 110 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 111 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 112 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 113 Backlog Report**

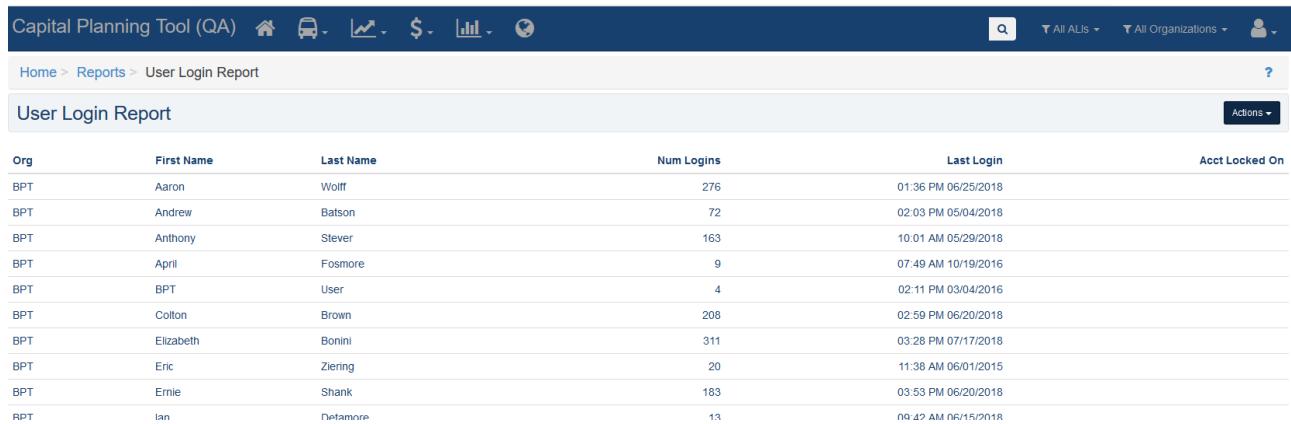


## 8.3 System Reports

System reports keep track of system-related functional metrics.

The User Login Report keeps track of users, the number of logins made, and the previous login of each user.

**Figure 114 User Login Report**



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

## Figure 115 Issues Report

The screenshot shows a web-based application interface for managing issues. At the top, there's a navigation bar with icons for home, reports, and search. Below it, a breadcrumb trail shows 'Home > Reports > Issues Report'. The main area is titled 'Issues Report' and contains a table of bug reports. The columns in the table are: ORGANIZATION, TYPE, DATE/TIME, COMMENTS, BROWSER, FIRST NAME, LAST NAME, PHONE, ISSUE\_STATUS, and RESOLUTION\_COMMENTS. There are three entries in the table:

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

## 8.4 Planning Reports

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

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

## Figure 116 Revenue Vehicle Replacement Report

The screenshot shows a report titled 'Revenue Vehicle Replacement Report' with a header including 'Jump to...', 'Fiscal Year FY 19-20', and 'Actions'. The main content is a table titled 'All Transit Operators' with the following columns: Fiscal Year, Category, Class, Sub Type, Count, Book Value, and Replacement Cost. The data is organized by fiscal year (FY 19-20) and vehicle category (Revenue Vehicles). The table includes various vehicle types like Buses (Rubber Tire Vehicles), Sedan/Station Wagon, Bus Commuter/Suburban, etc., with their respective counts, book values, and replacement costs.

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

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

**Figure 117 State of Good Repair Report**

| State of Good Repair Report                |                                |                             |       |               |                  |
|--|--------------------------------|-----------------------------|-------|---------------|------------------|
| 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 118 Disposition Report**

| Disposition Report    |                  |                              |                                |       |             |
|-----------------------|------------------|------------------------------|--------------------------------|-------|-------------|
| 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     | \$3138,463  |
| 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 119 Asset Service Life Summary Report**

| Asset Service Life Summary Report |                       |          |                      |                      |                        |
|-----------------------------------|-----------------------|----------|----------------------|----------------------|------------------------|
| Asset Type                        |                       | 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 120 TAM Service Life Summary Report**

Capital Planning Tool (QA) Home Reports TAM Service Life Summary Report ?

**TAM Service Life Summary Report**

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

**Filter or Export**

## 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 121 Asset Fleet Builder**

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

Fleets

Revenue Vehicles    Support Vehicles    Manage Fleets

Orphaned Assets

Any Asset Type: [dropdown] Tag/ID/VIN/Plate: [dropdown] Any Mfr.: [dropdown] Any Model: [dropdown] Year Mfd: [dropdown] Any Subtype: [dropdown] Any Vehicle Type: [dropdown] Any Status: [dropdown]

| Agency                  | Asset Type | Asset Tag | External ID | VIN | License Plate | Manufacturer | Model | Year Manufactured | Asset Subtype | FTA Vehicle Type | Status | Action |
|-------------------------|------------|-----------|-------------|-----|---------------|--------------|-------|-------------------|---------------|------------------|--------|--------|
| Loading, please wait... |            |           |             |     |               |              |       |                   |               |                  |        |        |

Asset Fleet Builder

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

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

**Build Revenue or Support Fleets** →

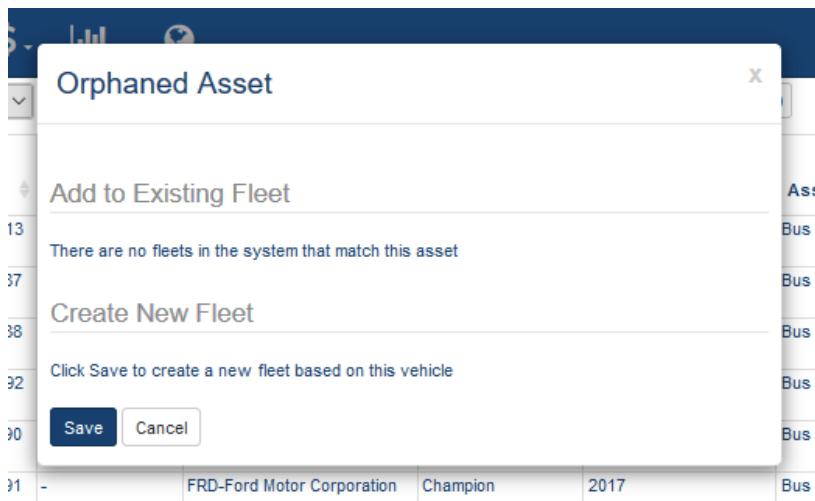
Build Revenue Vehicles Fleets  
 Build Support Vehicles Fleets

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

**Figure 122 Asset Fleet Builder—Orphaned Assets**

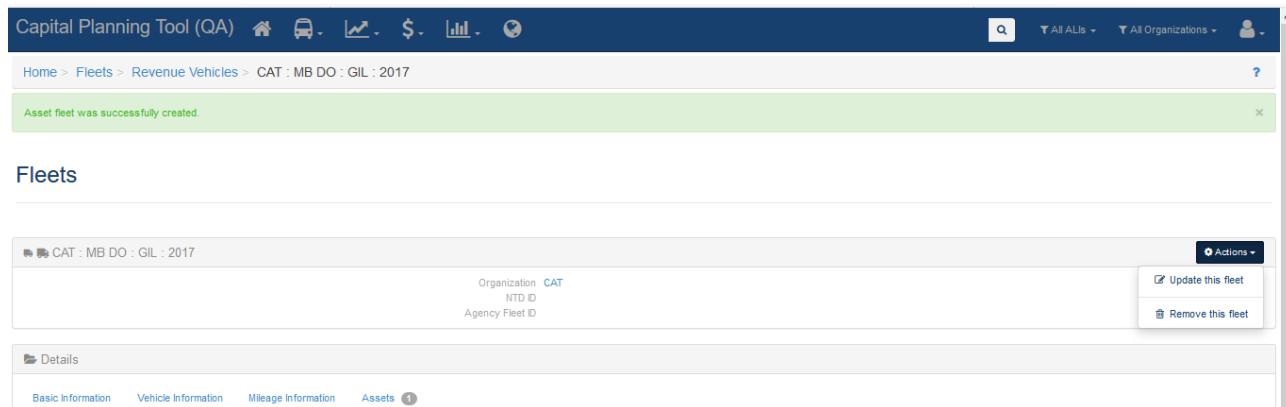
The screenshot shows the 'Fleets' section of the Capital Planning Tool (QA). At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is selected. Below it, the 'Orphaned Assets' section is displayed with a table of assets. The table includes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

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 123 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 124 Adding a New Fleet**



**Figure 125 Update Asset Fleet Details**

#### Update Asset Fleet

##### NTD ID

0

##### Agency Fleet ID

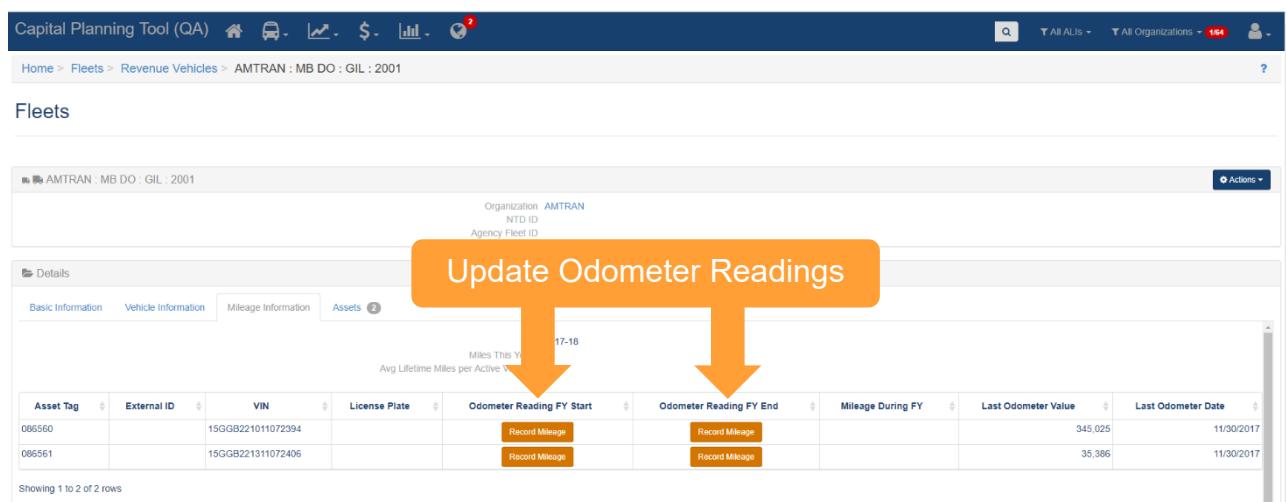
##### NTD Notes

Notes will appear in generated NTD report.

**Update Asset fleet**

**Cancel**

**Figure 126 Update Odometer Readings**



**Figure 127 Remove or Add Assets from within a Fleet**

The screenshot shows a web-based application interface for fleet management. At the top, there's a navigation bar with links for Home, Fleets, Revenue Vehicles, and specific filters for AMTRAN, MB DO, GIL, and 2001. Below this is a header for 'Fleets' with a sub-header for 'AMTRAN : MB DO : GIL : 2001'. The main content area displays a table of assets with columns for Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of data are shown: one for asset 086561 with VIN 15GGB221311072406 and another for asset 086560 with VIN 15GGB221011072394. Both assets are listed as 'In Service' with 'No' in the other columns. To the right of the table, an orange callout box contains the text 'Add or Remove Assets' and points to a green plus sign icon in the 'Action' column of the last row.

| 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            | ➕      |

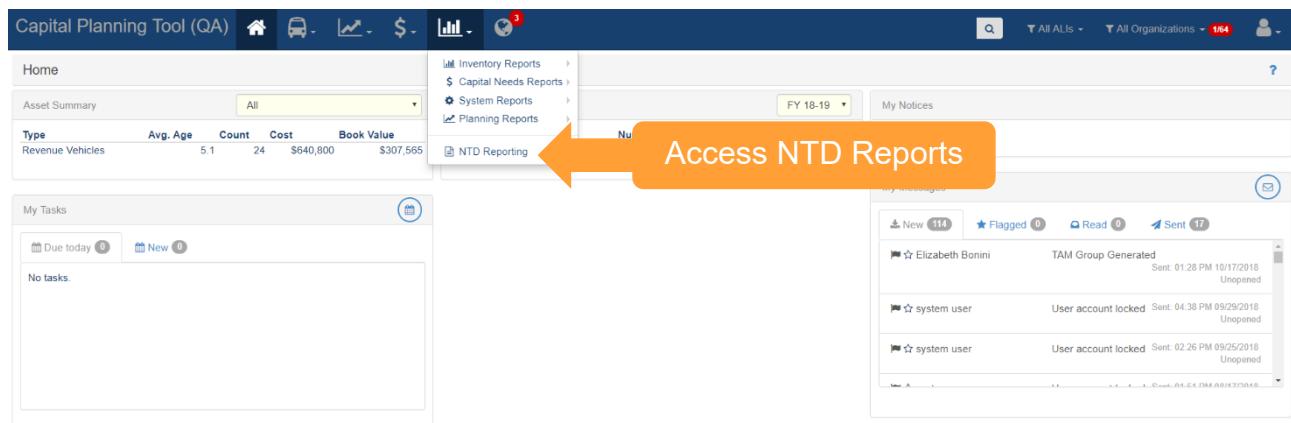
## 9.2 NTD Asset Reports

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.

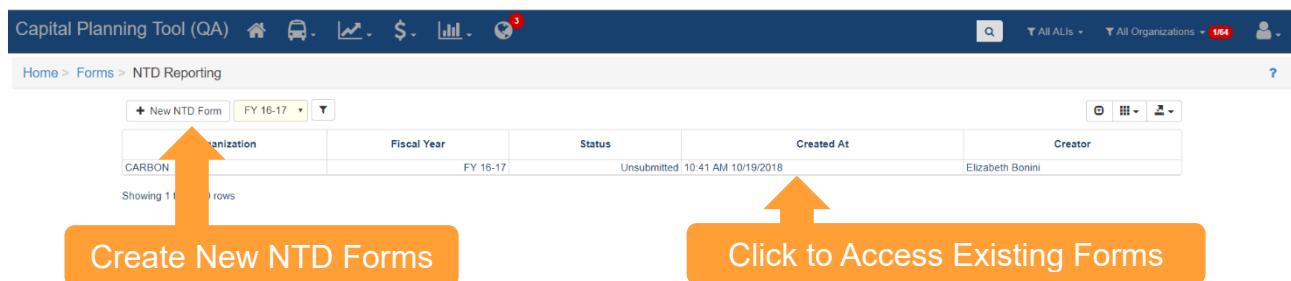
Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

**Figure 128 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 129 Table of Previously Generated NTD Reports**



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

**Figure 130 Create New Reporting Year Forms**

New NTD Report

**Organization**  
BUTLER-Butler County Community Public Transportation

**Fiscal Year**  
FY 2016 - 2017

**Agency Information**

**Reporter Name**  
Elizabeth Bonini

**Reporter Title**

**Reporter Department**

**Reporter Email**  
ebonini@pa.gov

**Reporter Phone**  
9999999999

**Reporter Phone Ext**

**Save NTD Form** ← Click Save NTD Form Button

**Figure 131 NTD Report Details and Data**

**CARBON FY 16-17**

**Actions**

- Organization: CARBON
- Year: FY 16-17
- Status: Unsubmitted
- Last Updated: 10:41 AM
- submit this form
- New version
- Remove this form

**Details**

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

**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

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 132 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**

## 10.0 Admin Tools

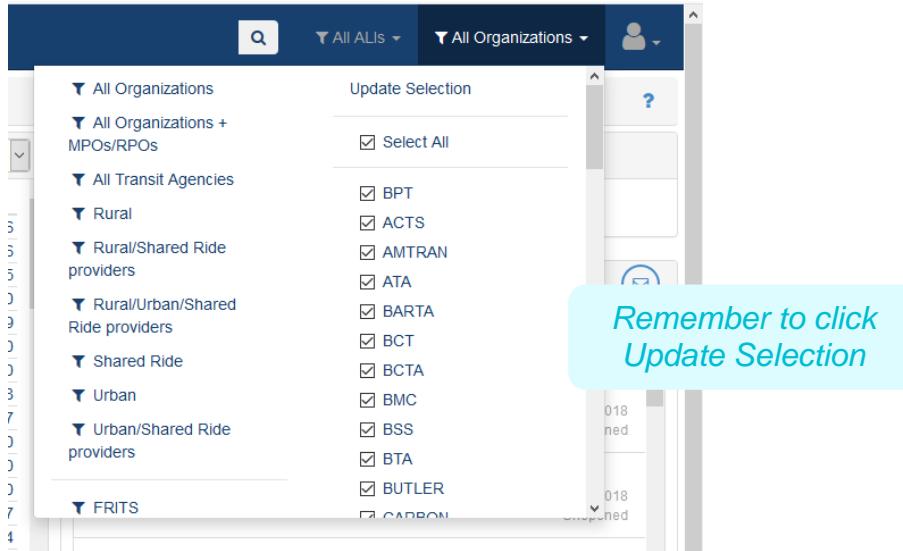
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

**Figure 133 Admin User and Organization Options**

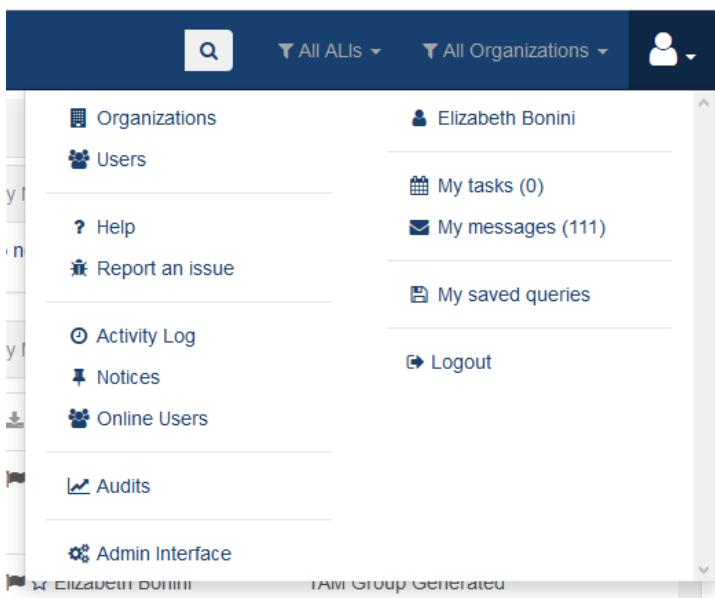


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

**Figure 134 Organizations**



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

**Figure 135 Admin User Options**

## 10.1 Organizations

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

**Figure 136 Admin Organizations**

The screenshot shows the Admin Organizations page. At the top, there is a navigation bar with icons for home, search, and other functions. Below the navigation bar, the URL is 'Home > Organizations'.

At the top left of the main area, there are three buttons: '+ New Transit Operator', '+ New Planning Partner', and 'Agency Type ▾'. On the far right of this row are several small icons.

The main content is a table with the following columns: Type, Organization, Name, Full Address, Phone, Ext, Fax, and Web Site. There are two rows of data:

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

At the bottom left of the table area, there is a large orange button with white text that says 'Add new organizations'. An orange arrow points upwards from this button towards the '+ New Transit Operator' button.

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

**Figure 137 Add an Organization**

## 10.2 Users

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

**Figure 138 Admin Users**

| Organization | Title | First    | Last    | Email                 | Phone          | Role      | Privileges              | Num Logins | Last Login             | Locked | Active | Created At             |
|--------------|-------|----------|---------|-----------------------|----------------|-----------|-------------------------|------------|------------------------|--------|--------|------------------------|
| BPT          |       | Nicholas | Baldwin | nbaudwin@pa.gov       | 717-787-1209   | BPT Staff | BPT Manager             | 200        | 11:52 AM<br>07/20/2018 |        | ✓      | 12:01 PM<br>03/07/2016 |
| BPT          |       | Batson   |         | abatson@bakerintl.com | 717-221-2060   | BPT Staff |                         | 72         | 02:03 PM<br>05/04/2018 |        | ✓      | 10:32 AM<br>05/05/2016 |
| BPT          |       | Birger   |         | jbirger@camsys.com    | 617-123-4567   | Guest     |                         | 9          | 09:54 AM<br>06/01/2015 |        | ✓      | 03:20 PM<br>05/28/2015 |
| BPT          |       | Bonini   |         | ebonini@pa.gov        | (999) 999-9999 | BPT Staff | Admin<br>TAM Group Lead | 325        | 10:51 AM<br>07/20/2018 |        | ✓      | 03:20 PM<br>05/28/2015 |

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

**Figure 139 Add a User**

New User

User Organizations

\* Organization: Not Selected

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

Selected:

Choose All >

Roles & Privileges

\* User Role: [dropdown]

User Privileges:

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

User Details

\* First Name: [text input]

\* Last Name: [text input]

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

## 10.3 Notices

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

**Figure 140 Notices**

+ Add a notice

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

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

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

**Figure 141 Add a Notice**

New Notice

\* Subject

\* Summary

Details

Organization

All

\* Start Displaying      Hour  
07/20/2018      12:00 PM

Stop Displaying      Hour  
07/20/2018      11:00 PM

\* Notice Type

System Notice

**Create Notice**

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

**Figure 142 Notice on the Dashboard**

9

536  
786  
775  
280  
200

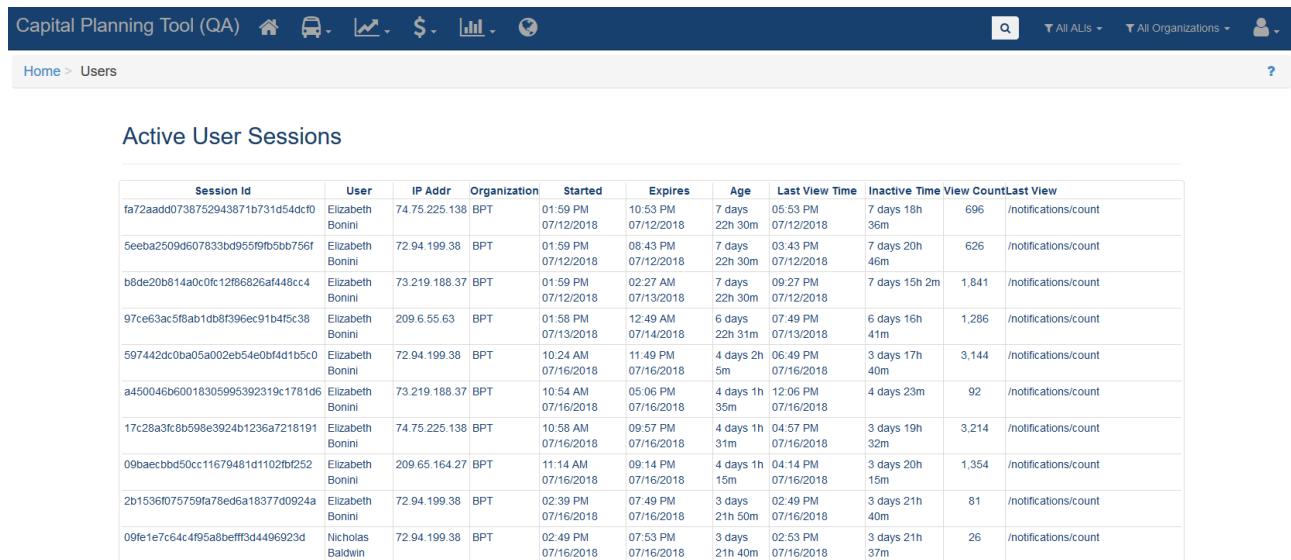
My Notices

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

My Messages

## 10.4 Online Users

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

**Figure 143 Active Users**


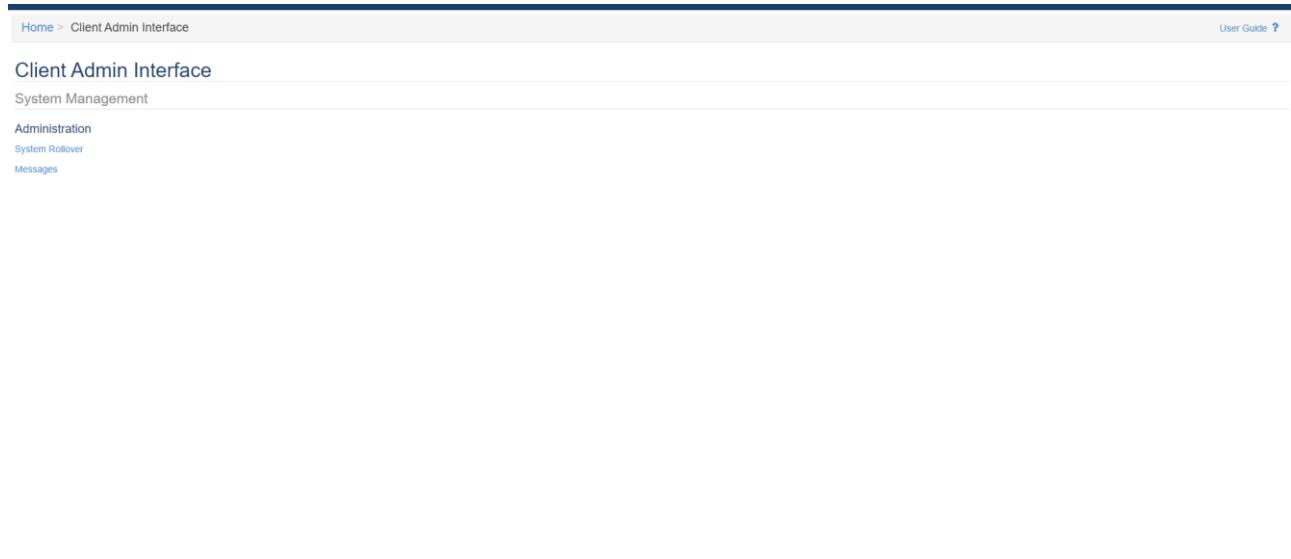
The screenshot shows the 'Active User Sessions' table from the TransAM Capital Planning Tool (QA). The table has columns for Session Id, User, IP Addr, Organization, Started, Expires, Age, Last View Time, Inactive Time, View Count, and Last View. The data includes sessions for various users like Elizabeth Bonini and Nicholas Baldwin, with details such as their IP addresses (e.g., 74.75.225.138, 72.94.199.38), organizations (BPT), and last viewed times (e.g., 05:53 PM, 09:49 PM).

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

## 10.5 Client Admin Interface

The Client Admin Interface is the location where users with the Client Admin privilege have the ability to modify certain client-controlled features, to include areas such as annual system rollover, system generated messages templates, and a message history log.

The functionality within the Client Admin Interface will be expanded over time. As existing features are updated and new modules and features are added, existing functionality within the System Admin Interface will migrate to and new functionality will be added to the Client Admin Interface.

**Figure 144 Client Admin Interface**

## 10.6 System Admin Interface

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

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

**Figure 145 System Admin Interface**

