

## TransAM

*General User*

# User Guide

*prepared for*

**Virginia Department of Rail & Public Transportation (DRPT)**

*prepared by*

**Cambridge Systematics, Inc.**



*user guide*

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# 1.0 Welcome!

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

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

## 1.1 Initial Log In and Password Reset

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

**Figure 1 Password Reset Request Screen**

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

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

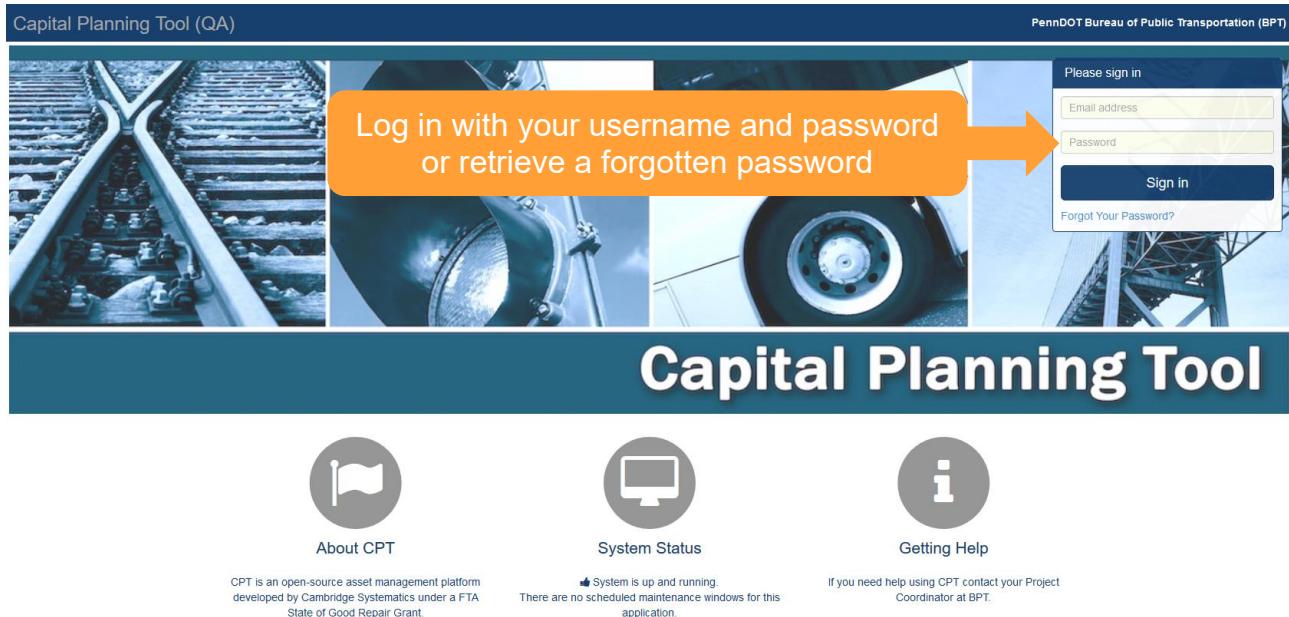
**Figure 2 Set/Reset Password Screen**

## 1.2 Ongoing Site Access

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

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

**Figure 3     Login Screen**



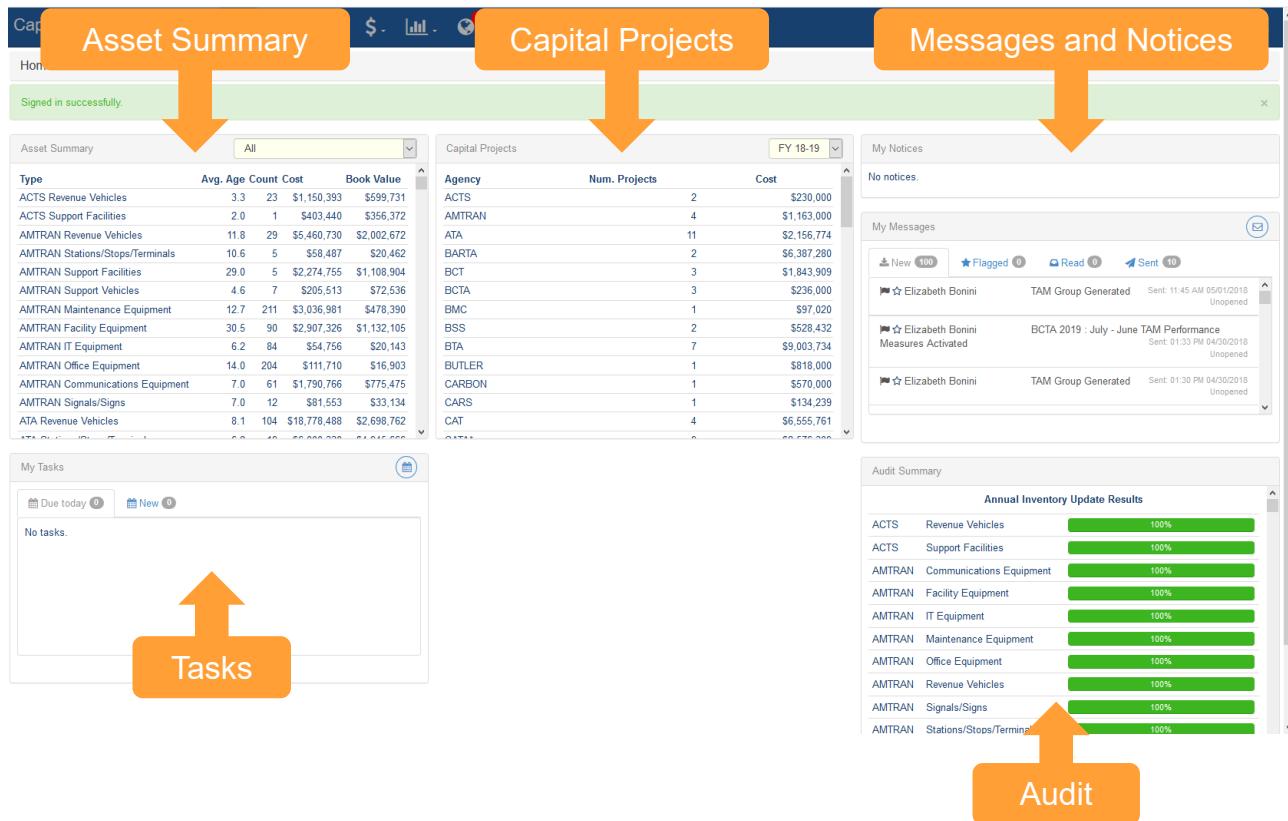
## 2.0 Dashboard

### 2.1 Dashboard Elements

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

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

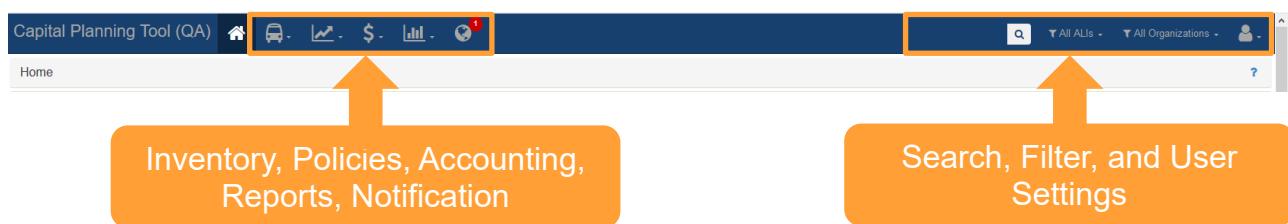
**Figure 4** Dashboard Elements



### 2.2 Header Menu and Controls

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

**Figure 5** Header Menu





## 3.0 General Features and Tools

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

### 3.1 Table Controls

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

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

**Figure 6 Sorting Controls**



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

**Figure 7 Export Button**



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

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

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

**Figure 8 Table Tools**



### 3.2 Site Filters

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

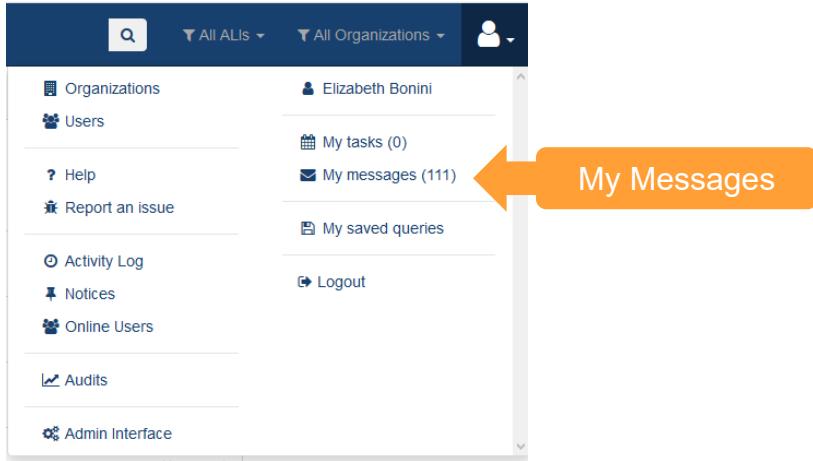
**Figure 9 Filter Icon**



### 3.3 Messages

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

**Figure 10 User Profile  
Messages**



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

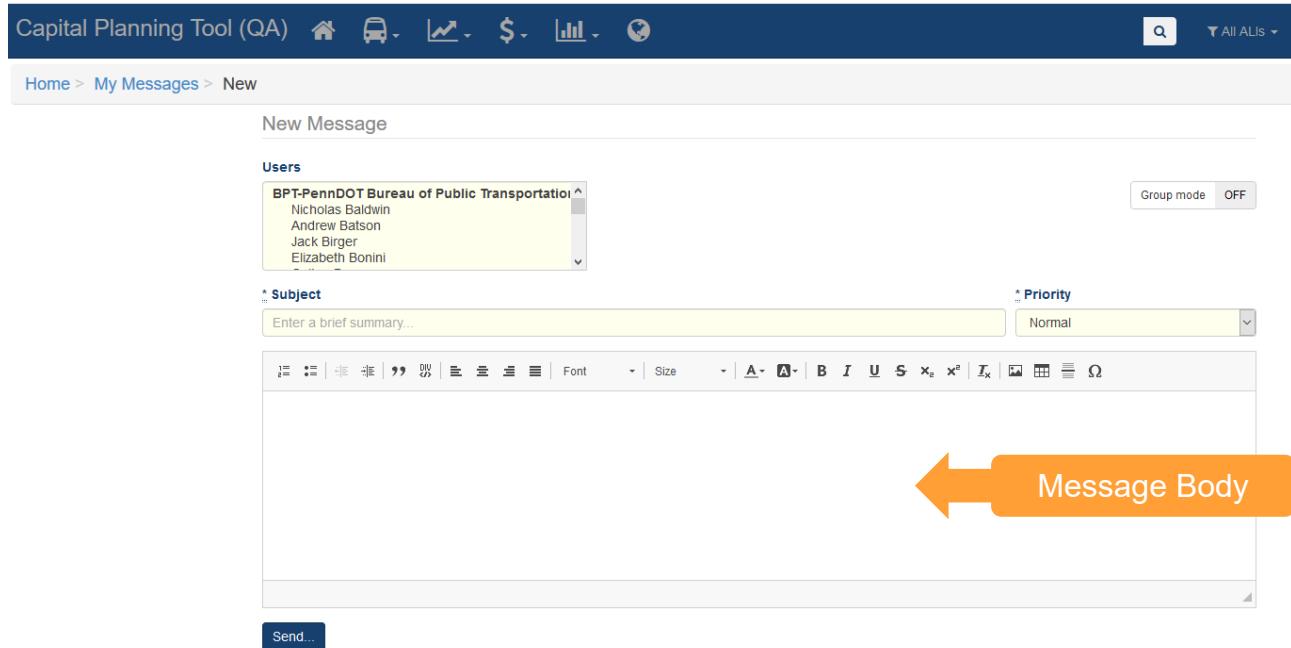
**Figure 11 Messages**

The screenshot shows the Capital Planning Tool (QA) interface with a navigation bar for Home, My Messages, and other tools like Home, Bus, Charts, and Data. Below the navigation is a search bar and a 'Compose' button. The main area is titled 'My Messages' and shows a list of three messages from 'system user'. Each message is labeled 'User account locked'. The first message was sent at 01:51 PM on 08/17/2018 and is marked as 'Unopened'. The second message was sent at 12:22 PM on 07/15/2018 and is also 'Unopened'. The third message was sent at 11:21 AM on 07/15/2018 and is also 'Unopened'. At the top of the message list, there are buttons for 'New (111)', 'Flagged (0)', 'Inbox (0)', and 'Sent (0)'.

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

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

**Figure 12 Message Interface**



### 3.4 Activity Line Item (ALI) Filter

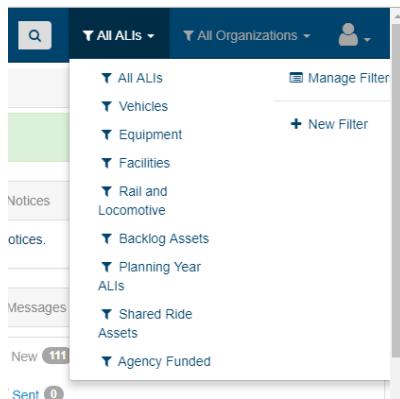
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

**Figure 13 ALI Filter**



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

**Figure 14 ALI Filters**



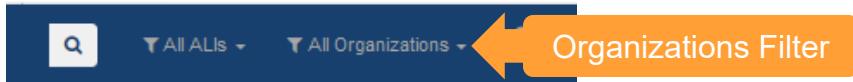
To create a new filter, select “New Filter” and specify the details required.

**Figure 15** New ALI Filter

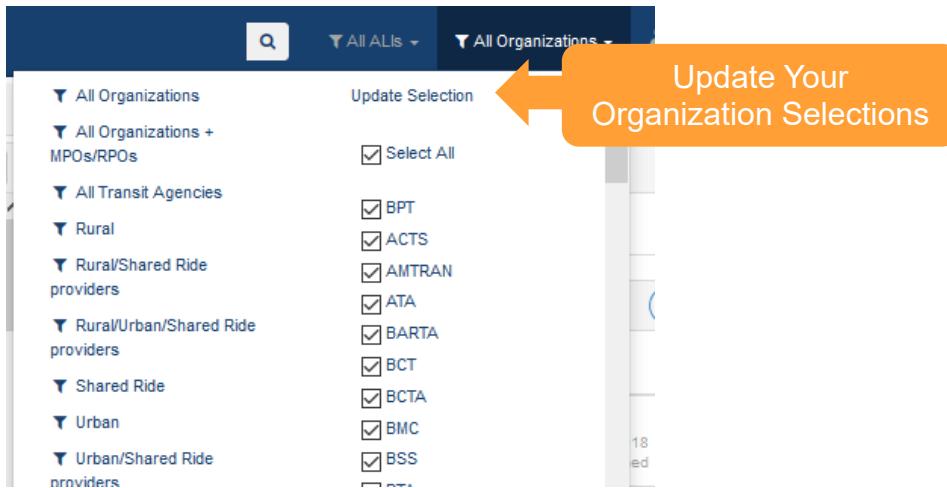
The screenshot shows the 'New ALI Filter' interface. On the left, there's a sidebar with 'Details' sections for 'Name' (with a placeholder 'Enter a name for this filter') and 'Description' (with a placeholder 'Enter a description for this filter'). Below these are options for 'Shared With': 'No One',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

### 3.5 Organizations Filter

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

**Figure 16** Organization Filter

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

**Figure 17** Organization Filter Selections

## 3.6 Search

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

**Figure 18** Search Box



## 3.7 User and Organization Options

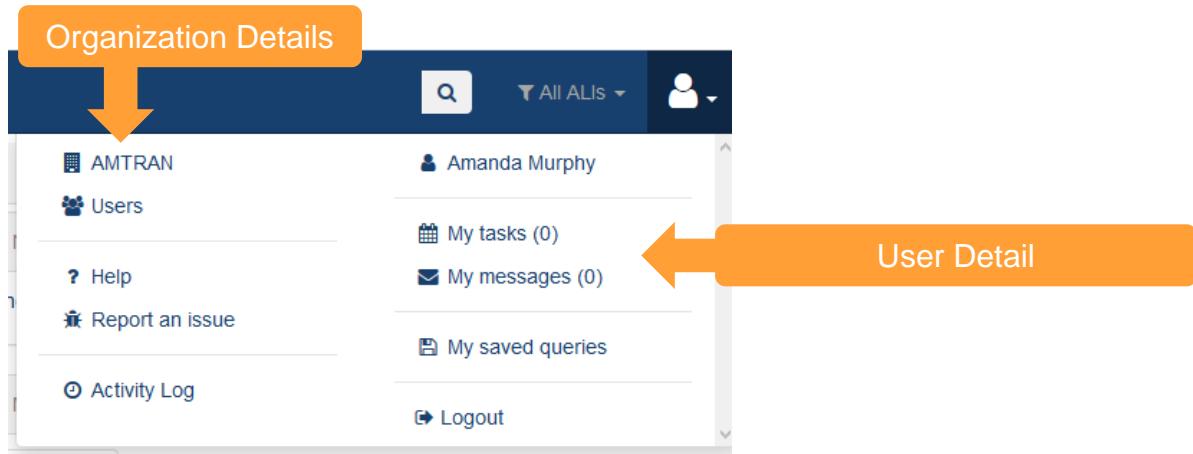
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

**Figure 19** User Menu



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

**Figure 20** User Menu Dropdown



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

**Figure 21 Organization Details**

**Edit Organization Details or Add Users**

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

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

**Figure 22 Profile Details**

**Edit Profile Details**

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

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

**Figure 23 Report an Issue**

## Report an Issue

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

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

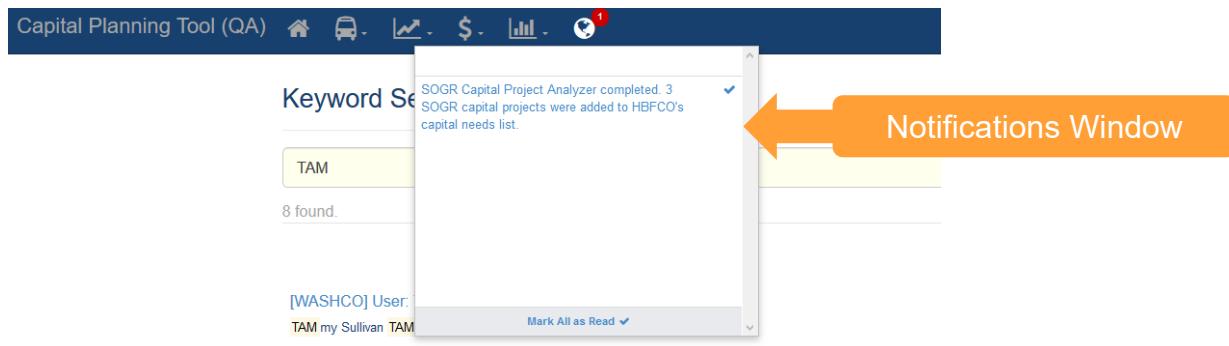
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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

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

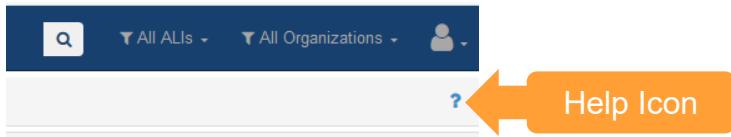
## 3.8 Notifications

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

**Figure 24 Notification Drawer**

## 3.9 Help

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

**Figure 25 Help Icon**

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

**Figure 26 Help Content**

A screenshot of the help content for the 'Dashboard Overview' page. The left sidebar contains a table of contents with sections like 'Capital Planning Tool Introduction', 'Getting Started', 'Main Menu', 'Overview', 'Assets and Inventory', 'Policy', 'Capital Planning', 'Funding', 'Reporting', 'Admin Functionality', and 'Glossary'. The main content area is titled 'Dashboard Overview' and contains a detailed description of the dashboard's widgets. It lists several widgets with their descriptions:

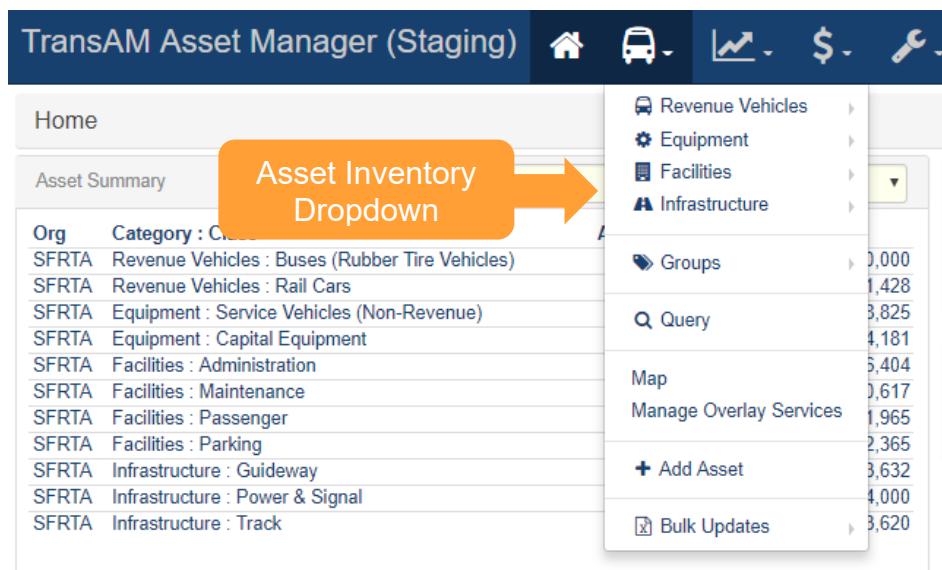
- My Messages:** A widget for managing your message in-box. Includes tabs for New, Flagged, Read, and Sent messages.
- My Tasks:** A widget showing incomplete tasks. Includes tabs for New and Due Today tasks.
- My Notes:** A widget that displays notes configured by organization. This information is displayed to all users in the system and often relates to system maintenance.
- Asset Summary:** A widget that displays a summary of a user's asset inventory. The system breaks down the inventory by organization and asset type - displaying average age, counts, cost, and book value. To drill down further, you can filter by asset type.
- Capital Projects:** A widget that displays a summary of a user's relevant capital projects. The system breaks down the capital project list by agency, number of projects, and estimated cost. To drill down further, you can filter on Fiscal Year.
- Audit Summary:** A widget that displays a summary of the Annual Inventory Update audit results.

At the bottom of the content area, it says 'Copyright © 2015 by Cambridge Systematics. All Rights Reserved.'

## 4.0 Asset Inventory

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

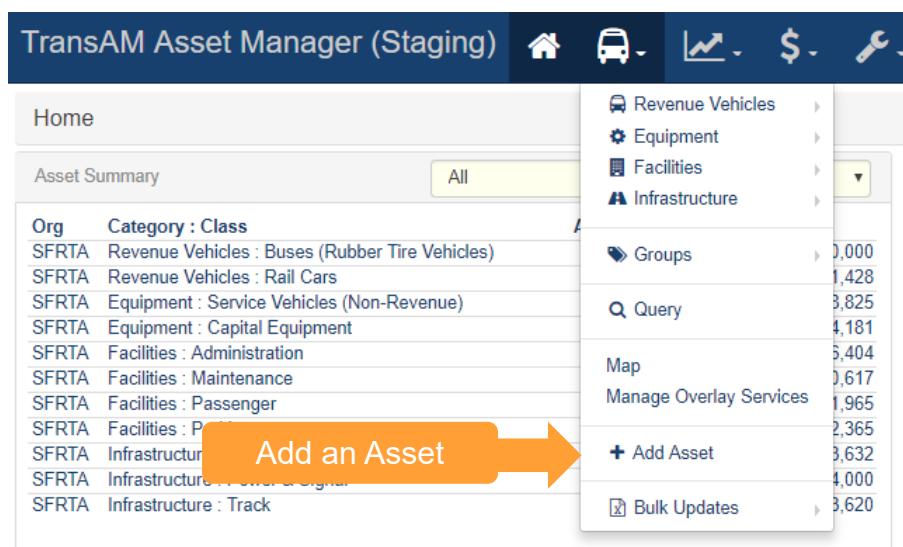
**Figure 27 Asset Inventory Dropdown**



### 4.1 Add an Asset

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

**Figure 28 Adding an Asset**



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

**Figure 29 Select the Organization and Asset Class**

Capital Planning Tool (QA) Home Bus Map \$ Graph Help

Home > Add Asset

New Asset

\* Organization  
Select organization...

\* FTA Asset Class  
Select asset class...

**Create New Asset**

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

**Figure 30 Adding Asset Required Details**

Capital Planning Tool (QA) Home Bus Map \$ Graph Help ? All ALIs ▾ All Organizations ▾

Home

Required Fields Recommended Fields

Organization  
\* Organization  
Altoona Metro Transit

Service Status  
\* Service Status

Identification & Classification  
\* Vehicle Identification Number (VIN)  
\* Asset ID  
\* Class  
Buses (Rubber Tire Vehicles)  
\* Type  
\* Subtype  
\* Estimated Service Life (ESL) Category

Characteristics  
\* Manufacturer  
Manufacturer (Other)  
\* Model  
Model (Other)  
\* Year of Manufacture  
\* Fuel Type  
Fuel Type (Other)  
Dual Fuel Type  
\* Length  
Length Units  
\* Seating Capacity (ambulatory)

*Any field on the required tab must be filled out*

**Figure 31 Add the Asset and Go To The New Record**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with sections like 'Funding' (Cost (Purchase), Funding Type, Direct Capital Responsibility), 'Procurement & Purchase' (Purchased New, Purchase Date), and a button '+ Add Asset & Go to New Record'. On the right, there are sections for 'Seating Capacity (ambulatory)', 'Standing Capacity', 'ADA Accessible' (radio buttons Yes/No), 'Operations' (In Service Date, Primary Mode, Service Type (Primary Mode)), and 'Dedicated Asset' (radio buttons Yes/No). An orange callout box with an arrow points to the '+ Add Asset & Go to New Record' button.

## 4.2 Accessing Existing Assets

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

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

**Figure 32 Existing Assets**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Asset Summary, Revenue Vehicles, Equipment, Facilities, Infrastructure, and a search/filter icon. A callout bubble points to the 'Revenue Vehicles' icon with the text: 'Click Asset Class to access a list of assets'. Below the navigation bar is a table titled 'Asset Summary' with columns for Type, Avg. Age, Due Date, Agency, and Num. Projects. The table lists various asset types like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc., with their respective details.

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

**Figure 33 Existing Asset Interface**

The screenshot shows the Capital Planning Tool (QA) interface for Revenue Vehicles. The top navigation bar includes links for Home, Revenue Vehicles, and Buses (Rubber Tire Vehicles). The main content area is titled 'Revenue Vehicles' and shows a table of all buses. The table has columns for Asset ID, Organization, VIN, Manufacturer, Model, Year, Class, Type, Subtype, Status, ESL, Last Life Cycle Action, and Life Cycle Action Date. Each row represents a specific bus unit, such as #1701, #271, #272, etc., with details like manufacturer (Gillig Corporation), model (Champion), year (2017), and class (Buses (Rubber Tire Vehicles)).

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

**Figure 34 Asset Record: Highlights**

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

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

**Figure 35 Asset Record: Profile and Summary**

Owner: CAT	Description: GIL 35' Low Floor
Asset Tag: #1701	External ID: GIL
Manufacturer: Gillig	Class: Revenue Vehicles
Type: Bus Std 35 FT	Status: In Service

Age: 0 yrs	Mileage:
Reported Condition: New/Excellent	

Replacement By Policy Status: FY 29-30	Scheduled Year: FY 29-30
Scheduled Cost: \$472,935	Replacement Cost: \$472,935
Policy Year: FY 29-30	

Useful Life Benchmark: Remaining	
----------------------------------	--

### 4.3 Editing or Updating Existing Asset Profile Data

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

**Figure 36 Editing the Profile of an Existing Asset**

The screenshot shows the TransAM software interface for managing asset profiles. At the top, there's a navigation bar with icons for home, vehicle, map, dollar sign, and other functions. Below the navigation bar is a toolbar with search, filter, and user icons.

The main area is titled "Profile" and contains tabs for "Identification & Classification", "Characteristics", "Funding", "Procurement & Purchase", "Operations", and "Registration & Title". The "Identification & Classification" tab is selected.

On the left, there's a detailed list of asset identification information:

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

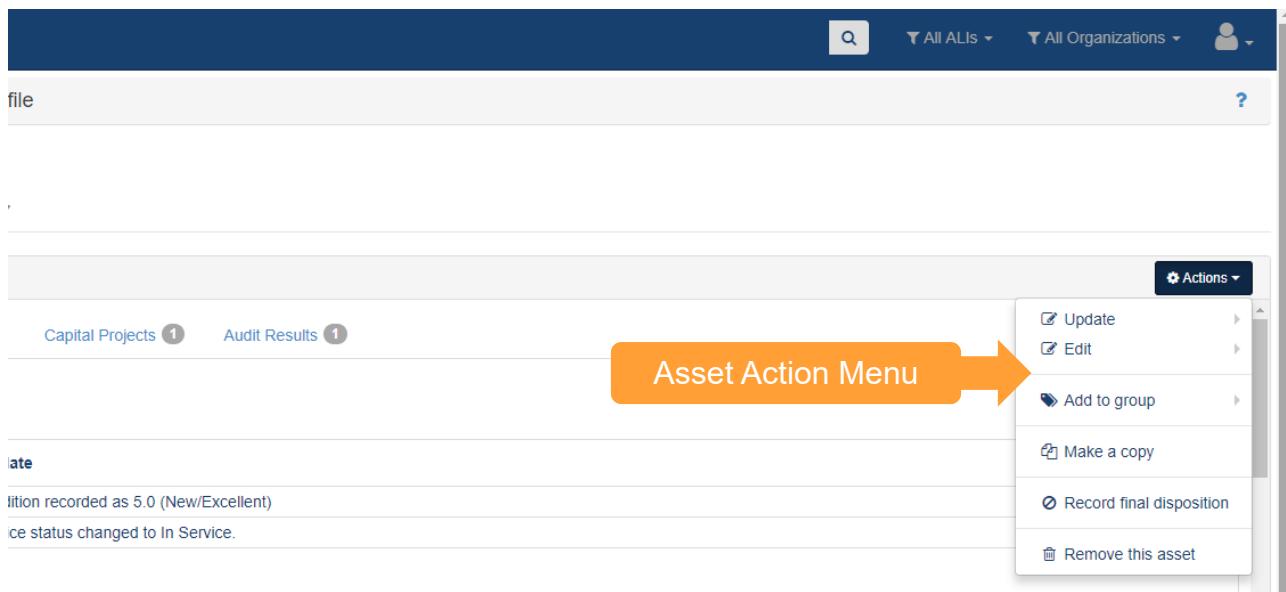
At the top right of the profile screen, there's an orange callout bubble with the text "Click Edit to Alter Profile Data" pointing towards the "Edit" button. The "Edit" button is located at the top right of the profile section.

## 4.4 Updating Existing Asset Lifecycle Data

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

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

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

**Figure 37 Updating the Lifecycle of an Existing Asset**

## 4.5 Action Events (Disposition and Transfer Review)

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

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

**Figure 38 Asset Action Events (Disposition and Transfer)**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The main area displays a table of assets with columns for Type, Avg. Age, and various metrics. A modal window titled 'Action Events' is open 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 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 39 Early Disposition Requests**

The screenshot shows the Capital Planning Tool (QA) interface with the title 'Home > Early disposition proposed'. At the top, there are buttons for 'Export All', 'Approve', and 'Reject'. An orange arrow points from the text 'Approve or Reject requests' to the 'Approve' 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 40 Bulk Updates**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The main area displays a table of asset data with columns for Type, Avg. Age, and various financial metrics. A vertical navigation bar on the right lists categories like Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Map, Manage Overlay Services, and a prominent '+ Add Asset' button. Below these are sections for Bulk Updates and Capital Projects, which includes a list of agencies. An orange callout box highlights the 'Bulk Updates' section, and an orange arrow points from the '+ Add Asset' button towards it.

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

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

**Figure 41 Bulk Update Tools**

This screenshot shows the 'Bulk Update Tools' page. At the top, there are buttons for 'Create a new Template' and 'Upload a Template'. An orange callout box highlights the 'Create a new Template' button. Below these buttons is a table listing previous bulk updates. The table has columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The data shows three entries: PIKECO (File Name: pikeco\_transit\_inventory\_updates\_file\_handler\_2018-04-17.xlsx), BETHANY JONES (File Name: IT\_EQUIPMENT\_UPDATE.xlsx), and another entry for BETHANY JONES. All entries show 'Complete' status and processed rows between 30 and 84.

Agency	File Name	Content	Loaded By	Status	Num Rows Processed	Num Rows Added
PIKECO	pikeco_transit_inventory_updates_file_handler_2018-04-17.xlsx	Inventory Updates	Toni Marino	Complete	30	30
BETHANY JONES	IT_EQUIPMENT_UPDATE.xlsx	Inventory Updates	BETHANY JONES	Complete	84	84
BETHANY JONES	IT_EQUIPMENT_UPDATE.xlsx	Inventory Updates	BETHANY JONES	Complete	84	84

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

## Figure 42 Bulk Update Details

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

Home > Bulk Updates > Download Template

**Bulk Update Templates**

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

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

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

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

**Select Template and Asset Type**

**Template Type**: Inventory Updates

**Fta Asset Class**: Select fta asset class...

**Organization**: Organization dropdown

**Create template**: Create template button

**Choose these parameters**

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

## Figure 43 Bulk Update Spreadsheet Download

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

Home > Bulk Updates > Download Template

**Success**

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

**Download File**

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

## Figure 44 Bulk Update Spreadsheet

Asset	Object Key	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep.
3	A2E18C2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN08YYU020684	In Service	01/23/2018			1.00	01
4	A2E18C29FDGK6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN07DXYU020685	In Service	01/23/2018			1.00	01
5	A2E18C3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018			1.00	01
6	A2E18C474G4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090105	In Service	01/23/2018			1.00	01
7	A2E18C474MF4E	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090106	In Service	01/23/2018			2.00	01
8	A2E18C56SG82	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090107	In Service	01/23/2018			2.00	01
9	A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291451090108	In Service	01/23/2018			2.00	01
10	A2E18C695LBRB	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291651090109	In Service	01/23/2018			2.00	01
11	A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291251090110	In Service	01/23/2018			2.00	01
12	A2E18C800038	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091596	In Service	01/23/2018			2.00	01
13	A2E18C817GK3	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271081091596	In Service	01/23/2018			2.00	01
14	A2E18C893ISGC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091597	In Service	01/23/2018			2.00	01
15	A2E18C935EM9	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091598	In Service	01/23/2018			2.00	01
16	A2E18C9AA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091599	In Service	01/23/2018			2.00	01
17	A2E18CB0HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271281091599	In Service	01/23/2018			2.00	01
18	A2E18C9EB5MK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271481091511	In Service	01/23/2018			2.00	01
19	A2E18C94CN614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271681091512	In Service	01/23/2018			2.00	01
20	A2E18C9GL0KL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091652	In Service	01/23/2018			2.00	01
21	A2E18C9DB97DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271091091653	In Service	01/23/2018			2.00	01
22	A2E18CE07EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271291091654	In Service	01/23/2018			2.00	01
23	A2E18CEF3ECK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271491091655	In Service	01/23/2018			2.00	01
24	A2E18CF54C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271691091656	In Service	01/23/2018			2.00	01
25	A2E18CFNSG4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091657	In Service	01/23/2018			2.00	01
26	A2E18CGGK040	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091658	In Service	01/23/2018			2.00	01
27	A2E18CGG3JG	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091659	In Service	01/23/2018			2.00	01
28	A2E18CHBAIB0	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271891091660	In Service	01/23/2018			2.00	01
29	A2E18CHKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271X91091661	In Service	01/23/2018			2.00	01
30	A2E18CIA78K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271191091662	In Service	01/23/2018			2.00	01
31	A2E18CIN06GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29165111645	In Service	01/23/2018			2.00	01
32	A2E18CJCFK1	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29185111646	In Service	01/23/2018			2.00	01
33	A2E18CK1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X5111647	In Service	01/23/2018			2.00	01
34	A2E18CL8K4	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29151111648	In Service	01/23/2018			2.00	01
35	A2E18GL8SC44	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271291079888	In Service	01/23/2018			2.00	01
36	A2E18GLUHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB271191079889	In Service	01/23/2018			2.00	01
37	A2E18GMNPW4	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGR271841178187	In Service	01/23/2018			2.00	01

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

**Figure 45 Bulk Update Upload**

The screenshot shows the 'Bulk Updates' section of the Capital Planning Tool. On the left, there's a sidebar with 'Bulk Updates' selected. The main area has a 'Spreadsheet' tab active. Under 'Spreadsheet Content', 'Inventory Updates' is selected. Under 'Organization', 'CATA\*-Centre Area Transportation Authority' is chosen. A large orange callout box with an upward arrow points to the 'Upload spreadsheet' button, which is highlighted in blue. The callout box contains the text: 'Select the parameters again and upload spreadsheet'.

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

**Figure 46 Bulk Upload Processing**

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

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

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

**Figure 47 Bulk Update Edit**

## 4.7 Query

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

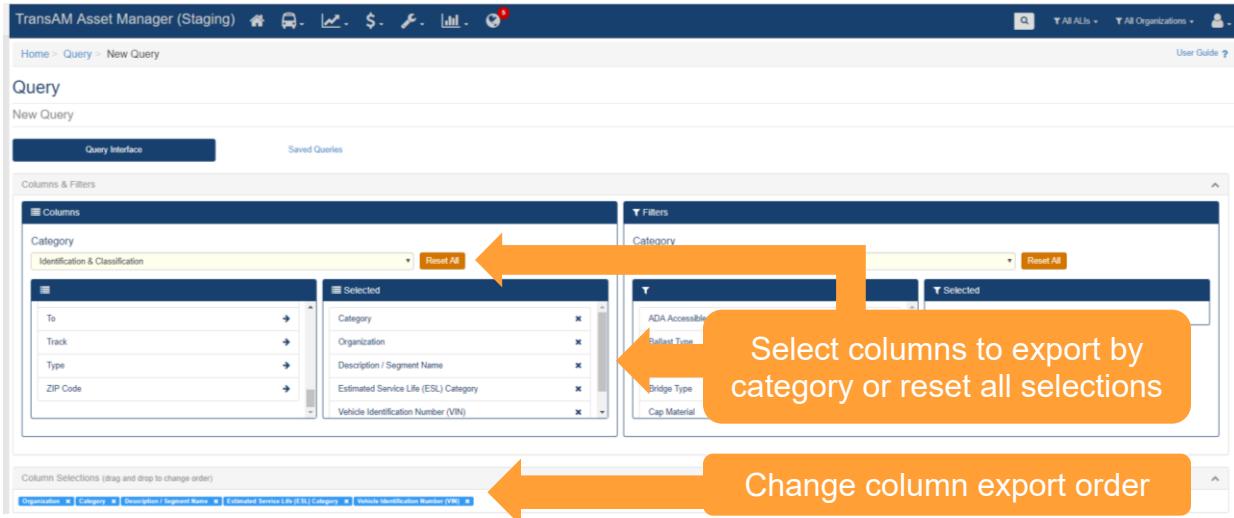
**Figure 48 Asset Query**

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

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

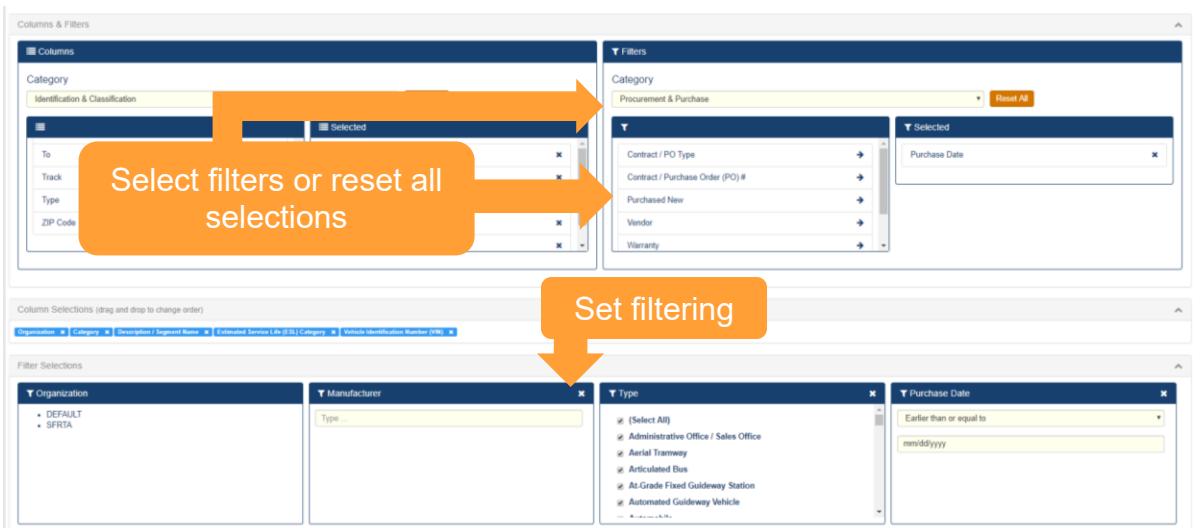
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

**Figure 49 Column Selection**



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

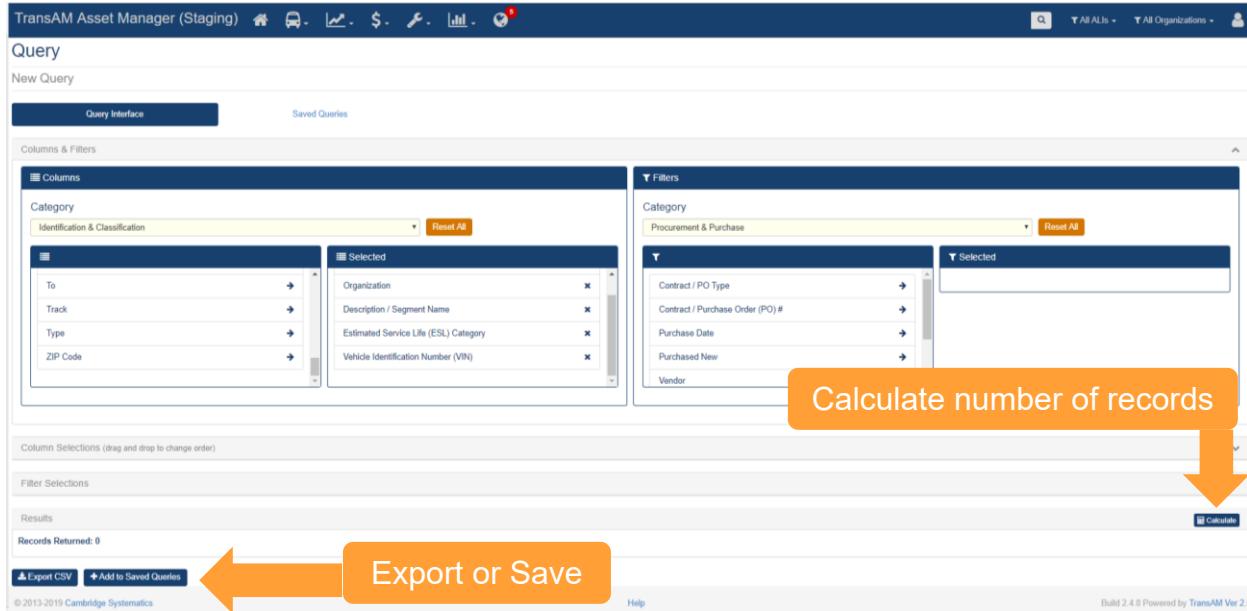
**Figure 50 Filter Selection**



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

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

**Figure 51 Calculate, Export or Save**



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

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

**Figure 52 Saved Queries**

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

## 4.8 Map

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

**Figure 53 Asset Map**

Capital Planning Tool (QA)

Home

Asset Summary

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

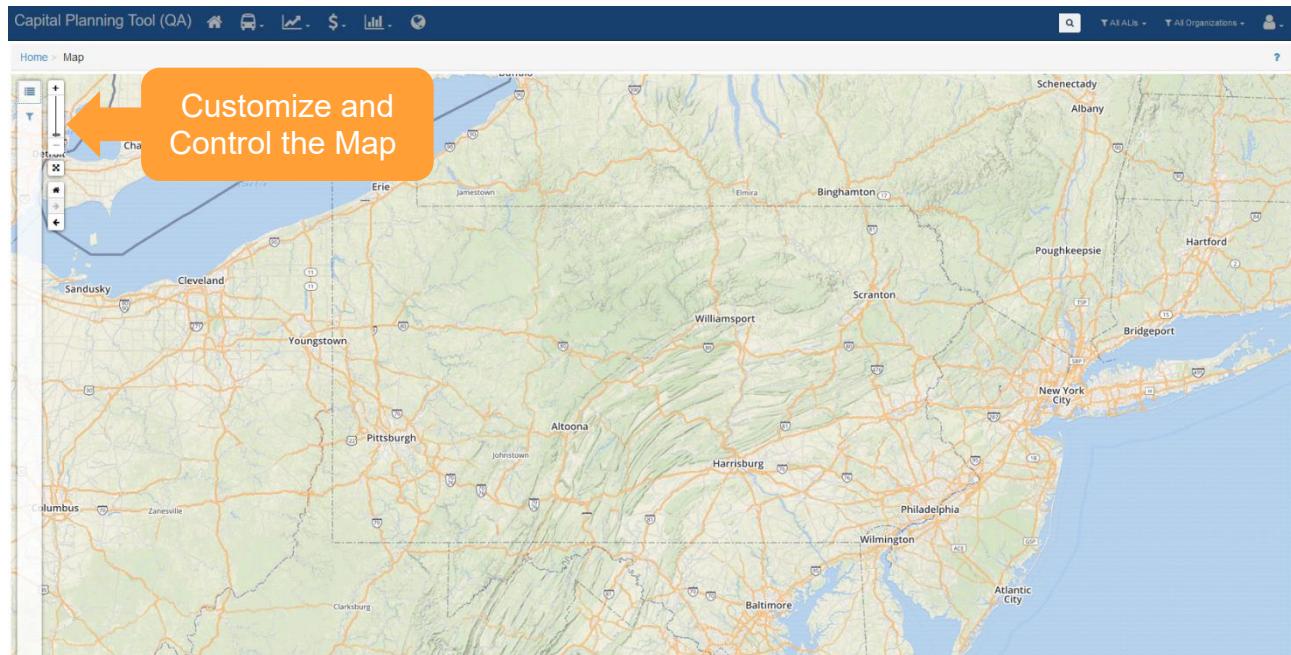
Revenue Vehicles  
Equipment  
Facilities  
Infrastructure  
Groups  
Action Events  
Map  
Manage Overlay Services  
+ Add Asset  
Bulk Updates

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

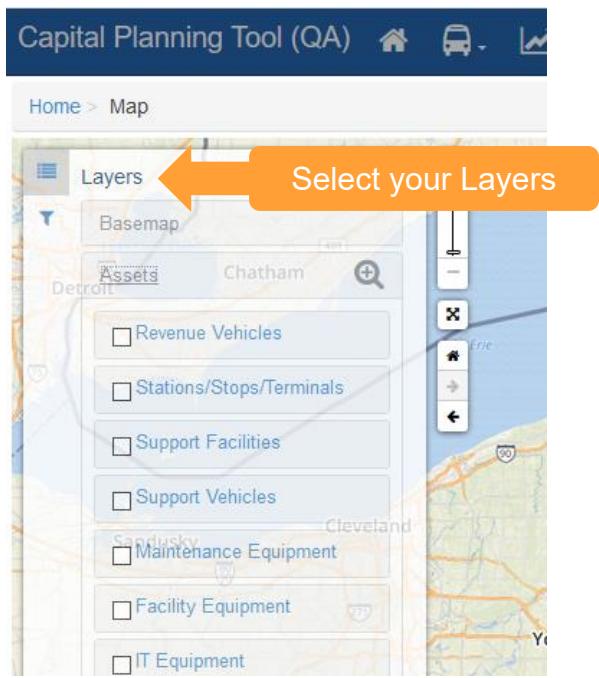
Map your Assets

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

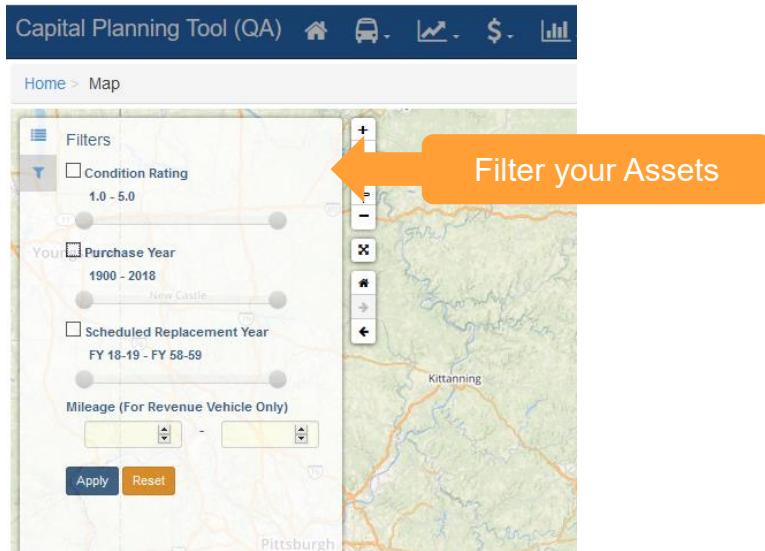
**Figure 54 Map Customization**



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

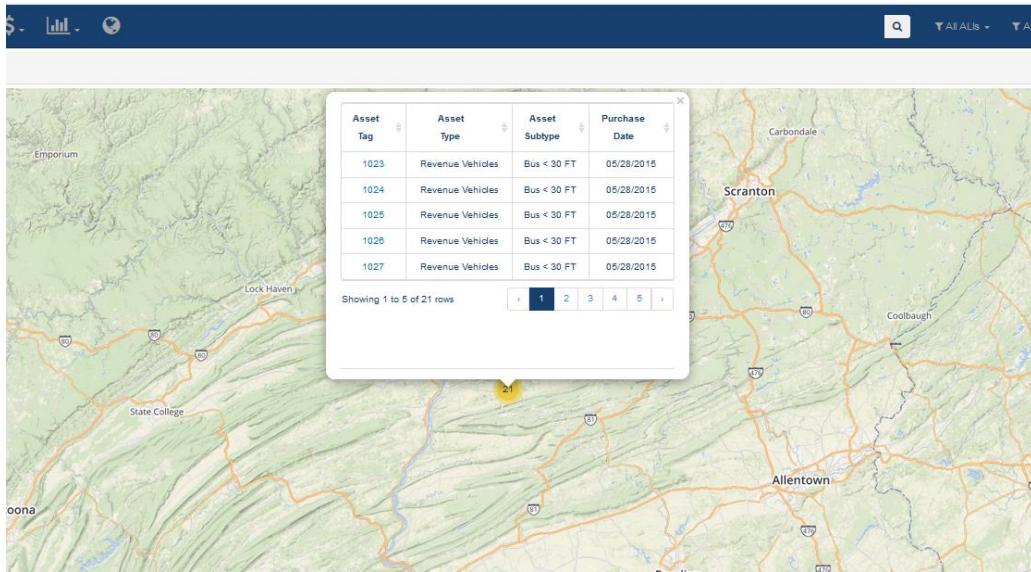
**Figure 55 Map Layers**

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

**Figure 56 Map Filter**

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

**Figure 57 Map Asset Details**



## 4.9 Groups

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

**Figure 58 Asset Groups**

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

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

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

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

## Figure 59 Adding an Asset to a Group

The screenshot shows the 'Revenue Vehicle Profile' page in the Capital Planning Tool (QA). At the top, there's a navigation bar with icons for Home, Revenue Vehicles, Buses (Rubber Tire Vehicles), and Buses (Rubber Tire Vehicles) Profile. Below the navigation is a search bar and links for All ALIs and All Organizations.

The main content area displays a 'Highlights' section with tabs for History, Tasks, Comments, Documents, Photos, Charts, Asset Values, Capital Projects, and Audit Results. A large orange arrow points from the 'Actions' dropdown menu to the 'Add to group' option. The 'Actions' menu also includes Update, Edit, Make a copy, Record final disposition, and Remove this asset.

In the center, there's a table showing Event details like Condition and Service Status Update. To the right of the table, a message says 'bus that are 35ft in length'. Below the table is an 'Asset Summary' section with fields for Owner, Description, Asset Tag, External ID, Manufacturer, Class, Type, and Status. The 'Profile' section contains tabs for Identification & Classification, Characteristics, Funding, Procurement & Purchase, Operations, and Registration & Title. Under 'Identification & Classification', there's a 'Vehicle Identification Number (VIN)' field containing '15GGB2713H3189913' and an 'Asset ID' field containing '#1701'. There's also an 'External ID' field with the value '15GGB2713H3189913'.

## 5.0 Maintenance

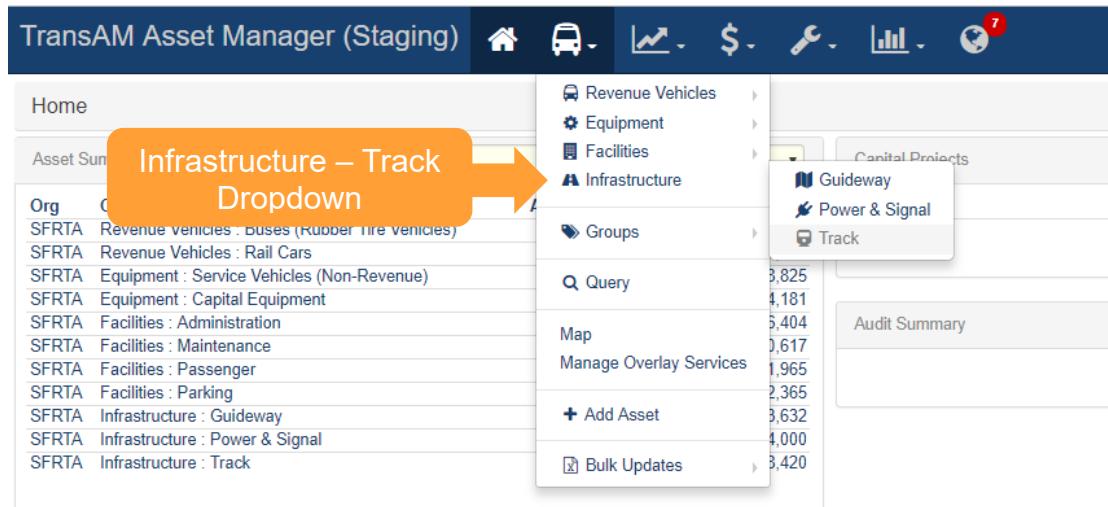
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

### 5.1 Performance Restrictions

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

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

**Figure 60 Asset Inventory Dropdown : Infrastructure - Track**



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

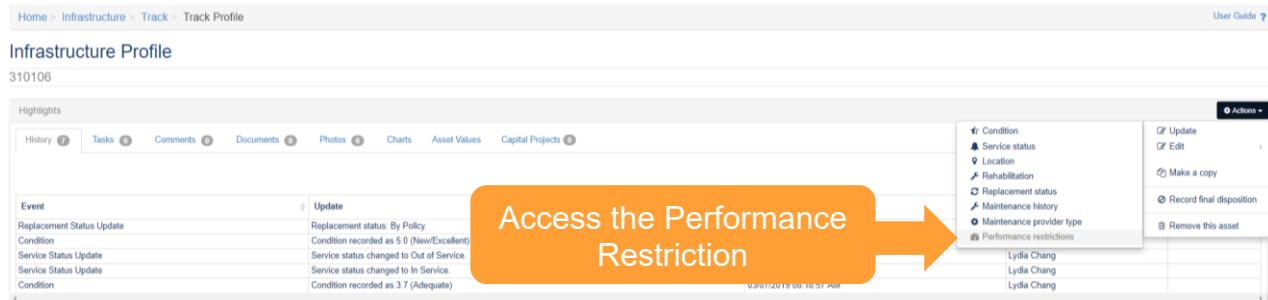
**Figure 61 Existing Asset Interface : Infrastructure - Track**

The screenshot shows the Existing Asset Interface for Infrastructure - Track. At the top, there's a header bar with 'Infrastructure' and 'All Track'. Below it is a table with columns: Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. The table contains 10 rows of data. An orange callout bubble points to the 'Asset ID' column, with another arrow pointing to the first row of data. The table footer shows 'Showing 1 to 10 of 275 rows' and '10 rows per page'.

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

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

**Figure 62 Lifecycle Action Menu**



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

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

**Figure 63 Performance Restriction Lifecycle Event**

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

Submit the Performance Restriction

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

**Figure 64 Maintenance Dropdown**

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

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

**Figure 65 Performance Restriction Management**

The screenshot shows a table titled 'Performance Restrictions' with a header 'Active Restrictions'. The table has columns for Status, Active Start, Active End, Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. There are 7 rows of data, each representing a different restriction event. The last row is a summary for 'Multiple' assets. A small note at the bottom left says 'Showing 1 to 7 of 7 rows'.

Status	Active Start	Active End	Asset / Segment ID	Org	Desc / Segment Name	Subtype	Line	From	Line	To	Track	Max Permissible Speed	Unit	Speed Restriction	Restriction Cause	Active Start	Active End	Submitted By	Status	Comments	
Active	07/05/2017 12:00 AM	Until Removed	311107	SFRTA	N/A	Tangent (Straight)	SX	1,024.00	SX	1,024.60	2	79	mph	25	mph	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	mph	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	mph	Maintenance	03/12/2019 10:26 AM	Until Removed	Lydia Chang	Active	<span>Closeout</span>
Active	03/12/2019 11:19 AM	Until Removed	311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 11:19 AM	Until Removed	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	mph	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	mph	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	mph	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 66 Policies Dropdown**

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

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

**Figure 67 Policy Rule Sets**

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

### 6.1 Asset Replacement/Rehabilitation Policy

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

**Figure 68 Asset Replacement/Rehabilitation Policy**

The screenshot shows the 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 for Asset Replacement/Rehabilitation Policy and TAM Policy. An orange callout bubble with the text "Asset Replacement/Rehabilitation Selection" points to the Asset Replacement/Rehabilitation Policy option. The main content area displays a table of asset data, and a sidebar on the right lists various organizations.

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

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

**Figure 69 Asset Replacement/Rehabilitation Policy Filters**

The screenshot shows the Asset Replacement/Rehabilitation Policy Filters page. At the top, there is a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. Below the breadcrumb, there is a search bar and a user icon. The main content area is titled "Asset Replacement/Rehabilitation Policy". It features two orange callout bubbles: one pointing to the "Organization Filter" dropdown and another pointing to the "Policy Year" dropdown. The "Organization Filter" dropdown is set to "BPT-PennDOT Bureau of Public Transportation". The "Policy Year" dropdown is set to "FY 2017 Statewide Transit Policy (Current)". Below these filters, there are sections for "Policy Rules", "Condition Threshold", and "Depreciation Calculation Type". At the bottom, there is a table with columns for Service Life Calculation Method, Repl. Cost Calculation Method, Condition Rollup Calculation Method, Annual Inflation Rate, Pct Residual Value, and Last Updated.

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

## Figure 70 Policy Rules

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

- Policy Owner:** PennDOT Bureau of Public Transportation
- Description:** FY 2017 Statewide Transit Policy
- Status:** Active
- Depreciation Calculation Type:** Straight Line
- Depreciation Interval:** Annually

Below these settings, there is a table with columns for Service Life Calculation Method, Repl. Cost Calculation Method, Condition Rollup Calculation Method, Annual Inflation Rate, Pct Residual Value, and Last Updated. The values listed are:

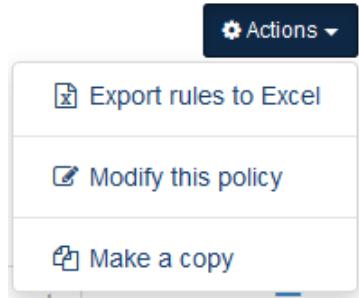
Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pct Residual Value	Last Updated
Age and Mileage	Purchase Price + Interest	Weighted Average	1.10	0%	10:58 AM 02/07/2017

A button labeled '+ Add an Asset Subtype Rule' is also visible.

An orange arrow-shaped callout points to the 'Actions' button in the top right corner of the page header.

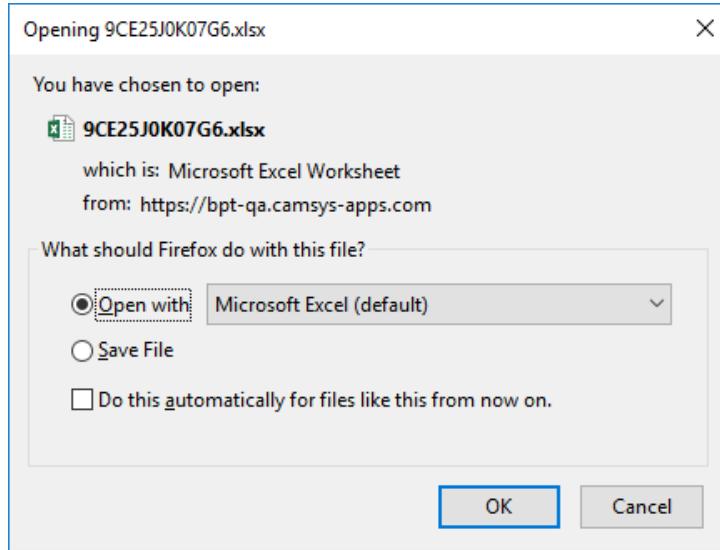
The Actions button will display a list of options as shown.

## Figure 71 Policy Rules Actions Dropdown



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

## Figure 72 Export rules to Excel (Windows dialog box)



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

**Figure 73 Modify (Update) Organization Policy Dialog**

## Update Policy

\* Description  
FY 2017 Statewide Transit Policy

\* Condition Threshold  
2.5

\* Depreciation Calculator  
Straight Line

\* Depreciation Interval  
Annually

Update Policy

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

**Figure 74 Copy Organization Policy Dialog**

## Update Policy

\* Description  
Copy of FY 2017 Statewide Transit Policy

\* Condition Threshold  
2.5

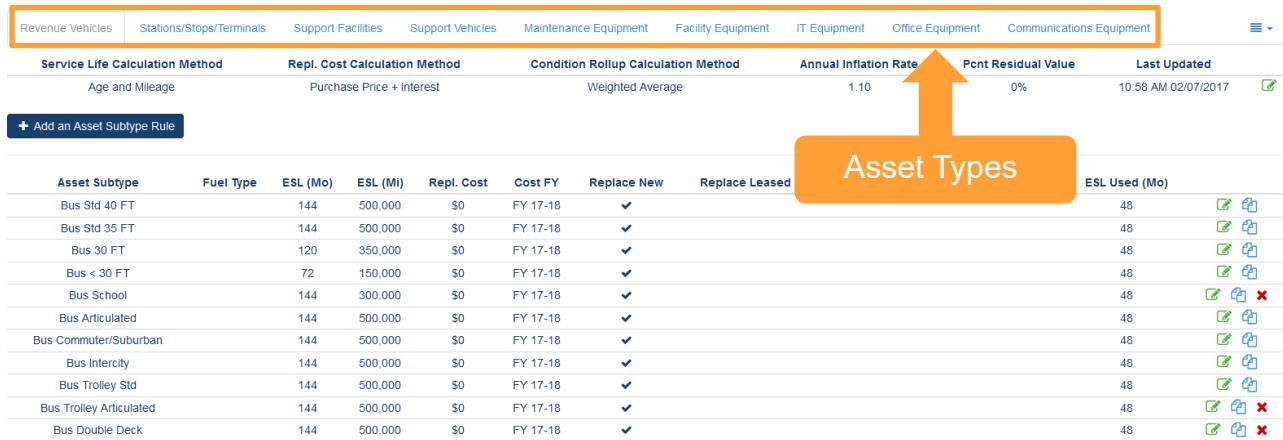
\* Depreciation Calculator  
Straight Line

\* 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.

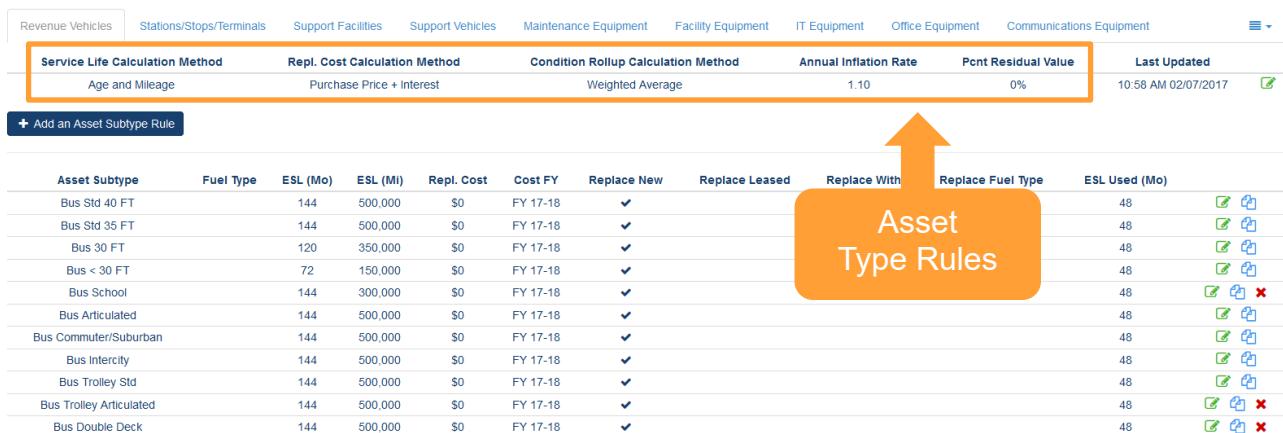
**Figure 75 Asset Types**


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

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

**Figure 76 Additional Assets Dropdown Icon**

The Asset Type Rules are listed below the Asset Types.

**Figure 77 Asset Type Rules**


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

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

**Figure 78 Edit Icon**

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

**Figure 79 Modify Asset Policy Rule**

## Modify Rule: IT Equipment

\* Service Life Calculation Type      \* Replacement Cost Calculation Type      Condition Rollup Calculation Type  
              
\* Annual Inflation Rate      \* Pct Residual Value      \* Condition Rollup Weight  
              
Save      Cancel

The Asset Subtypes that are displayed will correspond to the Asset Type tab. The available Asset Subtype rules are the same as the Subtypes in your inventory. The estimated service life information at the Asset Subtype level describes the asset and its expected lifespan.

**Figure 80 Asset Type and Asset Subtype rules**

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

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

**Figure 81 Modify Asset Subtype Rule**

\* ESL (Mo)      \* Replacement Cost      \* Cost FY  
              
 Replace With New  
 Replace With Leased  
\* ESL Used (Mo)      Lease Length Months  
        
\* Purchase Replacement Code      \* Lease Replacement Code  
        
\* Engineering Design Code      \* Construction Code      \* Rehabilitation Code  
              
Save      Cancel

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

**Figure 82 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 83 TAM Policy Dropdown Menu Selection**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, Policies, and other tools. Below this is a table titled 'Asset Summary' showing various asset types like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc., with columns for Type, Avg. Age, Count, Cost, and Book Value. To the right of the table is a 'Policies' section with a dropdown menu. The menu includes options like 'Capital Projects', 'Project Planner', 'SOGR Capital Project Analyzer', 'All Audit Results', and 'Annual Inventory Update Results'. The 'TAM Policy' option is highlighted with a green arrow and a callout bubble labeled 'TAM Policy Selection'.

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

Num. Projects	Cost
2	\$230,000
5	\$1,287,100
11	\$2,156,774
BARTA	\$6,387,280
BCT	\$1,843,909
BCTA	\$236,000
BMC	\$97,020
BSS	\$528,432
BTA	\$9,003,734
BUTLER	\$100,000
CARBON	\$570,000
CARS	\$134,239
CAT	\$6,555,761
DATA**	\$0,570,000

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

**Figure 84 TAM Policy Performance Measures**

Capital Planning Tool (QA) 🔍 All ALIS ⚙️

Home > Policies > TAM Policy > Performance Measures ?

### TAM Policy

Group Management Group Metrics Performance Measures

**Filters**

* Policy Year 2021	Period July - June	* Group Name <input type="text"/>	* Organization <input type="text"/> View
-----------------------	-----------------------	--------------------------------------	---

**Performance Measures**

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

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

**Figure 85 Policy Year Filters**

Filters

* Policy Year 2018	Period July - June	* Group Name <input type="text"/> New Group	* Organization <input type="text"/> BCTA-Beaver County Transit Authority
-----------------------	-----------------------	--	---

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

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

**Figure 86 Asset Type Percentage Settings**

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

Asset Category <input type="text"/> Revenue Vehicles	Group Name <input type="text"/> New Group	Agency Status Pending Activation	
---	--	-------------------------------------	--

Revenue Vehicles

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	25	<input checked="" type="checkbox"/> Editable
OR-Other	0	<input type="checkbox"/> Locked	10	<input type="checkbox"/> Locked
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	10	<input checked="" type="checkbox"/> 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 87 Activate Performance Measures**

TAM Policy

Group Management	Group Metrics	Performance Measures																					
<p>Filters</p> <table> <tr> <td>* Policy Year 2018</td> <td>Period July - June</td> <td>* Group Name New Group</td> <td>* Organization BCTA-Beaver County Transit Authority</td> <td><a href="#">View</a></td> </tr> </table> <p>Performance Measures : 2018 : July - June : New Group : BCTA</p> <table> <tr> <td>Asset Category Facilities</td> <td>Group Name New Group</td> <td>Agency Status Pending Activation</td> <td><a href="#">Activate</a></td> </tr> </table> <p>Facilities</p> <table> <thead> <tr> <th>Asset Class/Type</th> <th>TERM</th> <th>Editable/Locked</th> <th>Goal Pcnt</th> </tr> </thead> <tbody> <tr> <td>Passenger</td> <td>3</td> <td>Editable</td> <td>0</td> </tr> <tr> <td>Parking</td> <td>3</td> <td>Editable</td> <td>0</td> </tr> </tbody> </table>			* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<a href="#">View</a>	Asset Category Facilities	Group Name New Group	Agency Status Pending Activation	<a href="#">Activate</a>	Asset Class/Type	TERM	Editable/Locked	Goal Pcnt	Passenger	3	Editable	0	Parking	3	Editable	0
* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<a href="#">View</a>																			
Asset Category Facilities	Group Name New Group	Agency Status Pending Activation	<a href="#">Activate</a>																				
Asset Class/Type	TERM	Editable/Locked	Goal Pcnt																				
Passenger	3	Editable	0																				
Parking	3	Editable	0																				



## 7.0 Projects

An organization creates a capital project when they want to replace their assets or expand their inventory. Each capital project is composed of one or more building blocks, referred to as Activity Line Items (ALI), and is associated with one or more fiscal years. To frame it differently, ALIs should be considered a funding request for a project and each project can have one or more funding requests in a single year or across multiple years. A Capital Project generally falls into one of two categories:

- Projects that use the Asset Replacement/Rehabilitation policy information to replace existing assets to keep assets in a state of good repair. These are known as State of Good Repair (SOGR) projects.
- Projects that acquire new assets that enable you to provide new or expanded services or accomplish new business functions.

All projects created in the system will be listed in the Capital Projects table.

The SOGR projects will automatically be generated by running the State of Good Repair Project Analyzer, which is covered in the project planning section, so we'll quickly review how to create a new capital project manually.

**Figure 88 Capital Projects Table**

Capital Projects

Plan Summary		Capital Needs Chart																				
		FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30									
\$956,840,985		\$333,276,552		\$108,838,201		\$78,408,870		\$125,370,978		\$179,853,327		\$188,491,652		\$100,343,480		\$256,308,134		\$169,519,292		\$406,353,547		\$180,491,802
<b>+ New Capital Project</b>																						
Agency	FY	Project	Scope	Emgcy	SOGR	Shadow	Multi Year	Type	Title	Cost	State	Federal	Local	Total								
ACTS	18-19	ACTS 18-19 #3990	111		✓			R	Bus: Revenue Rolling Stock: Purchase - Replacement project	\$204,000	\$0	\$0	\$0	\$0 ⓘ								
								E	Mobile Vehicle Lifts	\$26,000	\$0	\$0	\$0	\$0 ⓘ								
								R	Bus: Support Facilities and Equipment: Acquisition project	\$139,500	\$146	\$0	\$4,647	\$4,793 ⓘ								
								R	Bus: Station Stops/Terminals: Acquisition project	\$23,500	\$0	\$0	\$784	\$784 ⓘ								
AMTRAN	FY 18-19	AMTRAN 18-19 #5680	111					I	VOH of Hybrid Electric Gilligs	\$975,000	\$0	\$0	\$32,497	\$32,497 ⓘ								
AMTRAN	FY 18-19	AMTRAN 18-19 #5681	114					I	Admin Building Security Upgrades	\$25,000	\$0	\$20,000	\$167	\$20,167 ⓘ								
AMTRAN	FY 18-19	AMTRAN 18-19 #5907	111					R	test	\$124,100	\$0	\$0	\$0	\$0 ⓘ								

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

**Figure 89 New Capital Project**

New Capital Project

\* Organization

\* Title  
Enter a title for this project...  
64 characters remaining

Project Locations  
PennDOT District 1 (District)  
PennDOT District 2 (District)  
PennDOT District 3 (District)  
PennDOT District 4 (District)

\* Fiscal Year  
FY 18-19

\* Scope

\* Project Type  
Replacement  Emergency project  Multi year project

\* Description  
254 characters remaining

\* Justification  
254 characters remaining

Filling in the required information will bring you to the capital projects detail screen, where you can see detailed information about a capital project and add ALIs and other details.

**Figure 90 Capital Project Details**

Capital Planning Tool (QA)       1

Home > Capital Projects > AMTRAN 18-19 #6087

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

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

**Edit Capital Project Details** 

**Capital Project Additional Details** 

Project Locations Senate District 30 (Senate)

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

**Figure 91 Add an ALI**

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

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

**Figure 92 Add an ALI Details**

The screenshot shows the Capital Planning Tool (QA) interface with the same layout as Figure 91. The 'Activity Line Items' tab is selected, showing a message 'There are no activity line items for this project.' Below it is the '+ Add Line Item' button. A large modal dialog box titled 'AMTRAN 18-19 #6126: New Activity Line Item' is open. It contains several input fields: 'Category' (dropdown), 'TEAM ALI Code' (dropdown), 'Cost Estimate' (\$ dropdown), 'Fiscal Year' (FY 18-19 dropdown), 'Replace with New' (radio buttons Yes or No), 'Count' (dropdown), 'Fuel Type' (dropdown), 'Length' (dropdown), and 'Name' (text input field). At the bottom of the dialog are 'Create Activity Line Item' and 'Cancel' buttons.

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



## 8.0 Project Planning

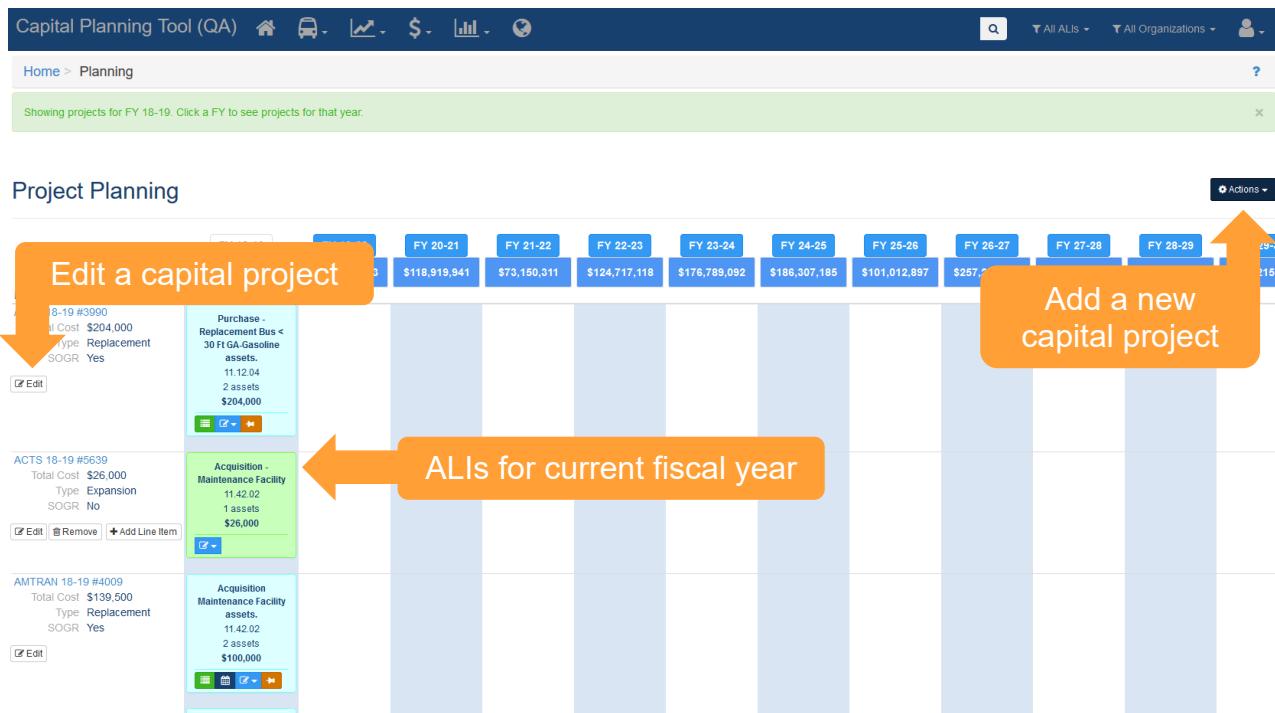
### 8.1 Project Planner

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

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

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

**Figure 93 Project Planner Interface**



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

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

**Figure 94 Edit Manually Created Capital Projects**

Capital Planning Tool (QA) Home > Planning

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

**Project Planning**

	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
<b>Project</b>	\$946,561,897	\$335,781,113	\$118,919,941	\$73,150,311	\$124,717,118	\$176,789,092	\$186,307,185	\$101,012,897	\$257,203,755	\$174,267,299	\$396,952,612	\$190,215
<b>ACTS 18-19 #3990</b>	Total Cost \$204,000 Type Replacement SOGR Yes	Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04										
<b>AMTRAN 18-19 #4009</b>	Total Cost \$139,500 Type Replacement SOGR Yes	Acquisition - Maintenance Facility 11.42.02 1 assets \$26,000										
		Acquisition - Maintenance Facility 11.42.02 2 assets \$100,000										

**Remove a project or add an ALI**

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

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

**Figure 95 Edit SOGR Capital Projects**

Project

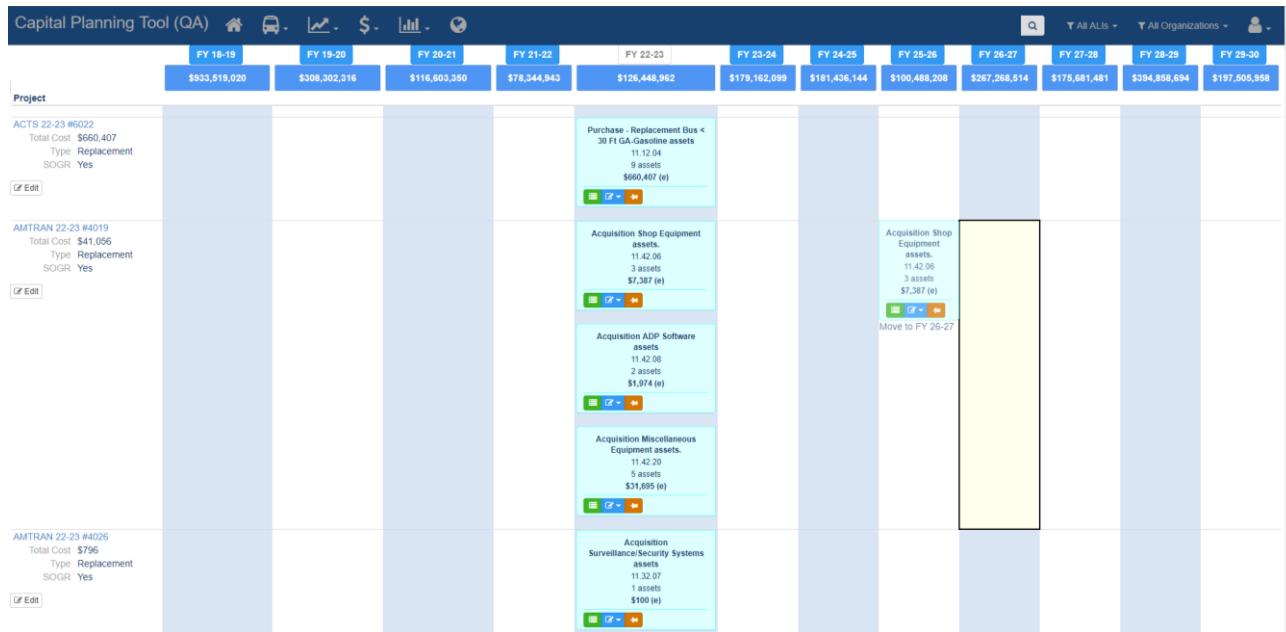
<b>ACTS 18-19 #3990</b>	Total Cost \$204,000 Type Replacement SOGR Yes	Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04 2 assets \$204,000
<b>AMTRAN 18-19 #4009</b>	Total Cost \$139,500 Type Replacement SOGR Yes	Maintenance Facility 11.42.02 1 assets \$26,000
		Acquisition - Maintenance Facility 11.42.02 2 assets \$100,000

**Edit SOGR project details**

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

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

**Figure 96 Prioritize Projects**  
*Move ALIs to Different Years*



## 8.2 State of Good Repair (SOGR) Capital Project Analyzer

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

**Figure 97 Running SOGR Capital Project Analyzer**

The SOGR Capital Projects Analyzer analyzes the capital inventory for your organization and generates a set of replacement and rehabilitation capital projects which are added to the capital needs list.

This analyzer uses your current Policy to determine when assets will be replaced and/or rehabilitated.

Once the builder has completed, you will need to review each capital project and update:

- Description of the project
- Justification for the project

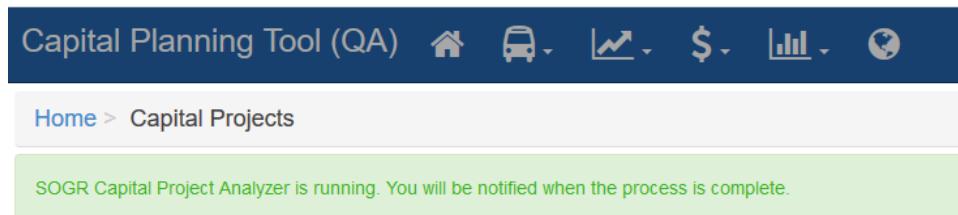
**\* Organization**

**\* Fta Asset Categories**  
 Revenue Vehicles  
 Equipment  
 Facilities  
 Infrastructure

**\* Starting Fiscal Year**

**Run analyzer...**

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

**Figure 98 SOGR Capital Project Analyzer Processing**

## 9.0 Compliance

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

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

**Figure 99 Compliance Options**



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

**Figure 100 Audit Results**

A screenshot of the Capital Planning Tool (QA) interface showing the "Audit Results" page. The top navigation bar includes icons for Home, Audit Results, Policies, Capital Projects, Project Planner, and SOGR Capital Project Analyzer. The breadcrumb trail shows "Home > Audit Results". The main content area is titled "Audit Results" and shows a message: "Found 1012 matching results". Above the results table are several filter options: "Revenue Vehicles", "failed", "Annual Inventory Update", and a "Notes" dropdown. An orange callout bubble labeled "Export Results" points to the "Audit" column header. Another orange callout bubble labeled "Filter Results" points to the filter options above the table. A light blue callout bubble contains the text: "Remember to check the appropriate boxes to export the rows you desire". The results table lists various audit items with columns for Org, Audit, Asset Tag, Description, Result, Updated At, and Notes.

Org	Audit	Asset Tag	Description	Result	Updated At	Notes
CCTA	Annual Inventory Update	Revenue Vehicles 105	GIL Low Floor	failed	03/30/2018	Service Status has not been updated during the audit period
CATA*	Annual Inventory Update	Revenue Vehicles 305	CMD Express 3500	failed	03/30/2018	Service Status has not been updated during the audit period
CTDC	Annual Inventory Update	Revenue Vehicles 306	FRD E350	failed	03/30/2018	Service Status has not been updated during the audit period
CTDC	Annual Inventory Update	Revenue Vehicles 307	FRD E350	failed	03/30/2018	Service Status has not been updated during the audit period
CTDC	Annual Inventory Update	Revenue Vehicles 401	FRD E450	failed	03/30/2018	Service Status has not been updated during the audit period
CTDC	Annual Inventory Update	Revenue Vehicles 402	FRD E450	failed	03/30/2018	Service Status has not been updated during the audit period



# 10.0 Funding

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

## 10.1 Programs

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

**Figure 101 Available Funding Programs**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a table titled 'Asset Summary' with columns for Type, Avg. Age, Count, and Cost. In the center, there's a dropdown menu titled 'Fund Projects' with options like 'Programs', 'Federal', 'State', and 'Local'. To the right, there's a list of funding programs with columns for Name, FY, Num. ALIs, and Cost. 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 102 Funding Program Details**

The screenshot shows the Capital Planning Tool (QA) interface for a specific funding program. The top navigation bar includes 'Home > Funding Programs > 5307'. The main content area has two sections: one on the left with details like Type (Federal), Formula (✓), and Inflation Rate (0.000%), and another on the right with tabs for 'Details', 'Templates (2)', 'Buckets (21)', 'Assets (827)', 'Documents (0)', and 'Comments (0)'. An orange callout bubble labeled 'Additional Program Information' points to the 'Details' tab.



## 11.0 Reports

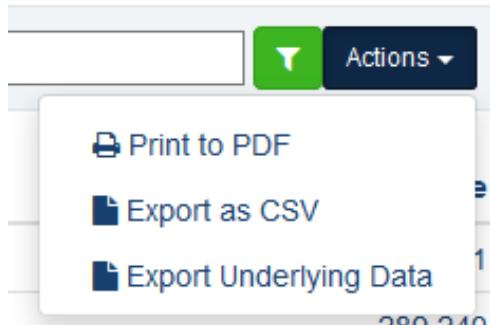
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

**Figure 103 Reports Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there are several icons: a house, a bus, a chart, a dollar sign, and a bar chart. Below these is a navigation bar with 'Home' and 'Asset Summary' tabs. The main area displays an 'Asset Summary' table with columns for Type, Avg. Age, Count, Cost, and Book Value. A 'Reports' dropdown menu is open on the right, listing 'Reports', 'Capital Needs Reports', 'System Reports', 'Planning Reports', and 'NTD Reporting'. An orange arrow points from the text 'Reports Dropdown' to this menu. To the right of the table, there is a section titled 'Num. Projects' and 'Cost' with some data rows.

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 104 Report Exports**

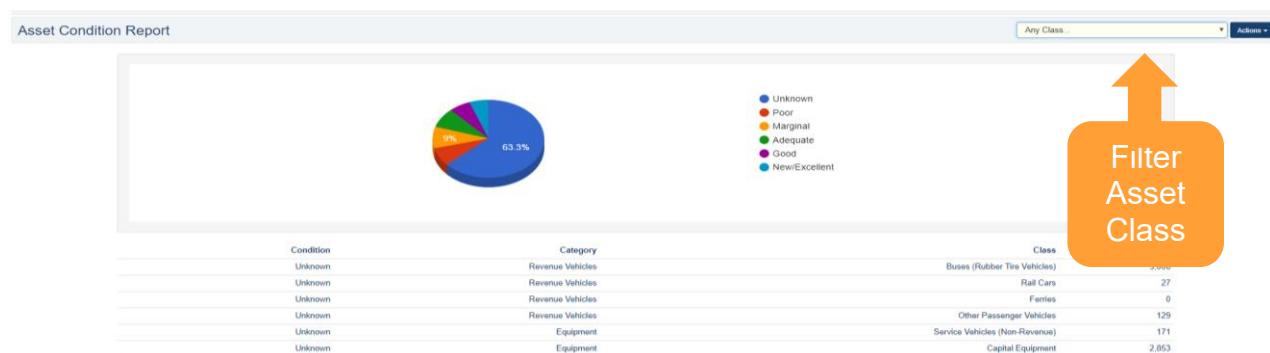


### 11.1 Inventory Reports

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

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

**Figure 105 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 106 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 107 Asset Funding Source Report**



## 11.2 Capital Needs Reports

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

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

## Figure 108 Backlog Report



The Unconstrained Capital Projects Report is a collection of unconstrained capital projects associated with individual organizations. This report can be filtered by fiscal year, emergency versus nonemergency, multi or single-year, and method of creation.

## Figure 109 Unconstrained Capital Projects Report



## 11.3 Planning Reports

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

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

## Figure 110 Revenue Vehicle Replacement Report

Revenue Vehicle Replacement Report						
				Jump to...	Fiscal Year	FY 19-20
All Transit Operators						
Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	\$220,647	\$1,032,574
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	28	\$10,703,185	\$15,351,540
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	156	\$33,434,345	\$64,564,155
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	151	\$26,090,859	\$65,899,722
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	404	\$22,996,202	\$117,170,310
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	59	\$12,696,894	\$20,638,200
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std	2	\$405,086	\$717,256
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	936	\$24,409,851	\$24,272,352
FY 19-20	Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	71	\$112,539,277	\$25,462,588

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

## Figure 111 State of Good Repair Report

State of Good Repair Report						
				Jump to...	Actions	
State of Good Repair: All Transit Agencies						
Category	Class	Sub Type		Count	Book Value	Replacement Cost
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Articulated		11	\$6,197,520	\$8,414,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT		438	\$136,243,902	\$169,321,201
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon		27	\$416,191	\$1,476,958
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban		161	\$67,597,460	\$92,477,734
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT		623	\$208,254,531	\$265,018,765
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT		736	\$53,347,885	\$217,175,923
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT		154	\$35,377,187	\$55,183,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van		1,204	\$36,625,492	\$31,357,436
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std		31	\$8,585,473	\$12,003,406
Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer		100	\$167,850,515	\$36,271,696
Revenue Vehicles	Rail Cars	Light Rail Car		9	\$25,636,417	\$3,087,370
Revenue Vehicles	Rail Cars	Commuter Locomotive Diesel		20	\$74,188,285	\$65,980,817
Equipment	Service Vehicles (Non-Revenue)	Pickup/Utility Truck		75	\$436,717	\$2,616,326
Equipment	Service Vehicles (Non-Revenue)	Sports Utility Vehicle		65	\$693,546	\$2,303,917
Equipment	Service Vehicles (Non-Revenue)	Van		79	\$729,509	\$2,272,877
Equipment	Service Vehicles (Non-Revenue)	Sedan/Station Wagon		62	\$437,762	\$1,546,568
Equipment	Service Vehicles (Non-Revenue)	Other Support Vehicle		31	\$212,606	\$1,610,645
Equipment	Service Vehicles (Non-Revenue)	Tow Truck		2	\$0	\$344,361
Equipment	Capital Equipment	Bus Maintenance Equipment		1,033	\$7,860,493	\$11,975,400
Equipment	Capital Equipment	Other Maintenance Equipment		140	\$11,904,184	\$16,743,063
Equipment	Capital Equipment	Rail Maintenance Equipment		2	\$73,195	\$1,180,195
Equipment	Capital Equipment	Other Facilities Equipment		416	\$3,164,904	\$5,017,581

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

## Figure 112 Disposition Report

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

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

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

**Figure 113 Asset Service Life Summary Report**

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

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

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

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

**Figure 114 TAM Service Life Summary Report**

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



## 12.0 Specialized Reports

### 12.1 Asset Fleet Builder

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

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

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

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

**Figure 115 Asset Fleet Builder**

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

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

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

**Figure 116 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 active. Below it, the 'Orphaned Assets' section is displayed with a table. The table has columns for Agency, Asset Type, Tag, ID, VIN, License Plate, Manufacturer, Model, Year Manufactured, Asset Subtype, FTA Vehicle Type, Status, and Action. There are four rows of data. In the 'Action' column, each row has a blue button labeled '+ Add to Fleet'. An orange arrow points from the 'Manage Fleets' tab to the 'Orphaned Assets' section. Another orange arrow points from the '+ Add to Fleet' button in the table to the 'Add Asset to Fleet' link in the modal.

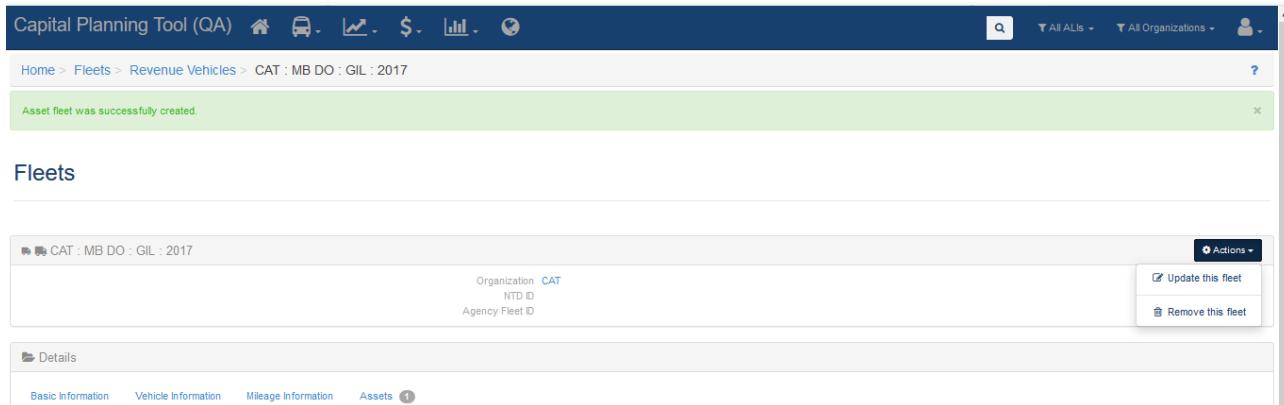
Agency	Asset Type	Tag	ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGGB2713H3188913	-	GIL-Gillig Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	+ Add to Fleet
CAT	Revenue Vehicles	#271	PT Bus #271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

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

**Figure 117 Adding an Orphaned Asset to a Fleet**

The screenshot shows the 'Orphaned Asset' modal window. It has two main sections: 'Add to Existing Fleet' and 'Create New Fleet'. The 'Add to Existing Fleet' section contains the message: 'There are no fleets in the system that match this asset'. The 'Create New Fleet' section contains the message: 'Click Save to create a new fleet based on this vehicle'. At the bottom of the modal are two buttons: 'Save' and 'Cancel'. The background of the modal shows a list of existing fleets, which are mostly 'Bus' type vehicles.

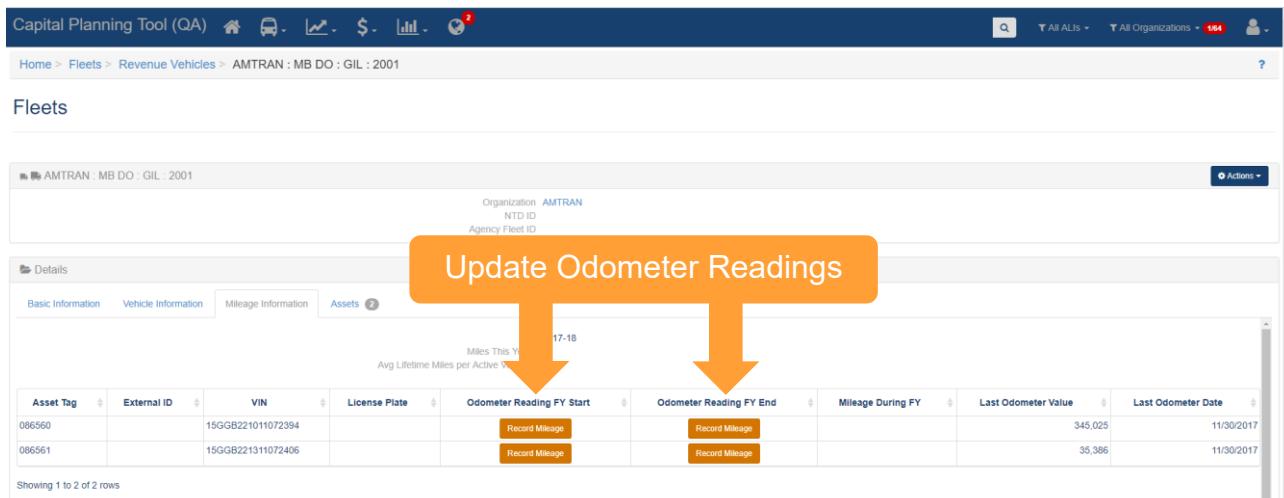
When you add the asset to a new fleet, if you wish to update fleet-specific details, look for the actions button, and click “Update this Fleet” to add details. Users also can remove the fleet completely, at which point all fleet assets will return to the Orphaned Assets portion of the Manage Fleets section. 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 118 Adding a New Fleet****Figure 119 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 120 Update Odometer Readings**

**Figure 121 Remove or Add Assets from within a Fleet**

The screenshot shows a web-based application interface for managing assets. At the top, there's a navigation bar with links for Home, Fleets, Revenue Vehicles, and specific filters for All ALIs and All Organizations. Below the navigation is a breadcrumb trail: Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001. The main content area is titled 'Fleets' and shows a table of assets for the organization AMTRAN. The table includes columns for Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows of data are visible: one for asset 086561 and another for asset 086560. An orange callout box with the text 'Add or Remove Assets' has an arrow pointing to the 'Action' column for the first 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	➕

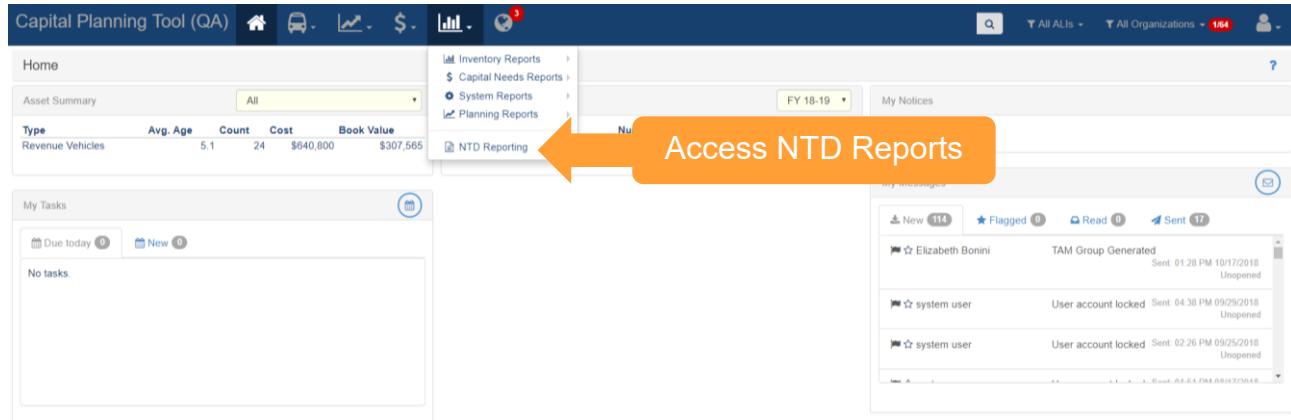
## 12.2 NTD Asset Reports

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

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

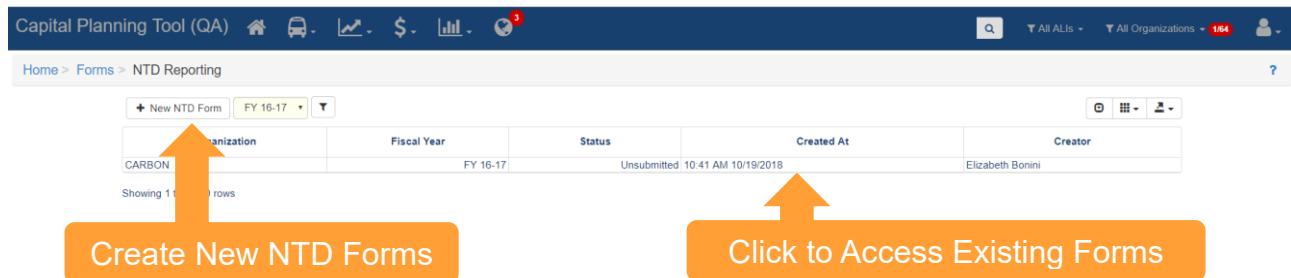
Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

**Figure 122 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 123 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 124 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 125 NTD Report Details and Data**

**CARBON FY 16-17**

**Actions**

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

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

**Submit, Create a New Version, or Remove**

**Details**

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

**Access Forms or Add a Comment**

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

**Figure 126 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**