



Capital Planning Tool (CPT)

Administrative User

user guide

prepared for

**Pennsylvania Department of Transportation (PennDOT)—Bureau of
Public Transportation (BPT)**

prepared by

Cambridge Systematics, Inc. &

KMJ Consulting, Inc.

user guide

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1.0 Welcome!

The PennDOT Capital Planning Tool (CPT) is an asset management system designed to support the needs of PennDOT's Bureau of Public Transportation (BPT) and the many transit agencies that operate in the Commonwealth. 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.

CPT is based on 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 screenshot shows a web form titled "Forgotten Password". On the left, there is a sidebar with instructions: "Enter your email address that you use to login to TransAM and click the button. If your email address is found in the system you will get an email with instructions for resetting your password. If you don't receive an email in a few minutes contact your program manager." On the right, there is a main form field labeled "Email" with a placeholder "Email address". Below the input field is a blue button labeled "Send me reset password instructions". An orange arrow points from the text in the sidebar to the "Email" input field. A callout bubble with an orange border contains the text: "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

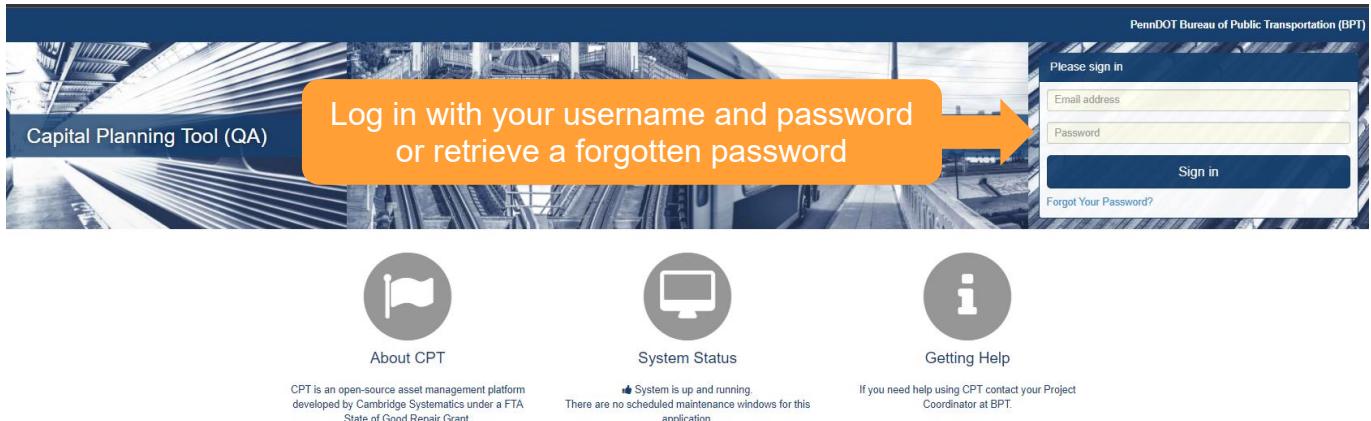
The screenshot shows a web form titled "Change Your Password". On the left, there is a sidebar with instructions: "Your password must conform to the following: At least 8 characters, Contain at least one upper case and one lower case letter, Contain at least one number". On the right, there are two input fields: "New password" and "Confirm your new password". Below these fields is a blue button labeled "Change my password".

1.2 Ongoing Site Access

The system can be accessed via the following URL: <https://pa-cpt.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

The screenshot shows the CPT dashboard with several sections:

- Asset Summary:** Shows a table of asset types, average age, count, cost, and book value.
- Capital Projects:** Shows a table of projects by agency, number of projects, and cost.
- Messages and Notices:** Shows a list of notices and messages from Elizabeth Bonini.
- My Tasks:** Shows a list of tasks due today or new.
- Audit Summary:** Shows annual inventory update results for various categories.

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, Maintenance Management, and Notifications. There also are controls to search, filter Activity Line Items (ALI) or organizations, and user settings.

Figure 5 Header Menu

The header menu includes:

- Home icon
- Icons for Bus, Map, \$, and other system functions.
- Search bar and filters for All ALIs and All Organizations.
- User settings icon.

Inventory, Policies, Accounting,
Reports, Maintenance
Management, and Notifications

Search, Filter, and User
Settings

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.

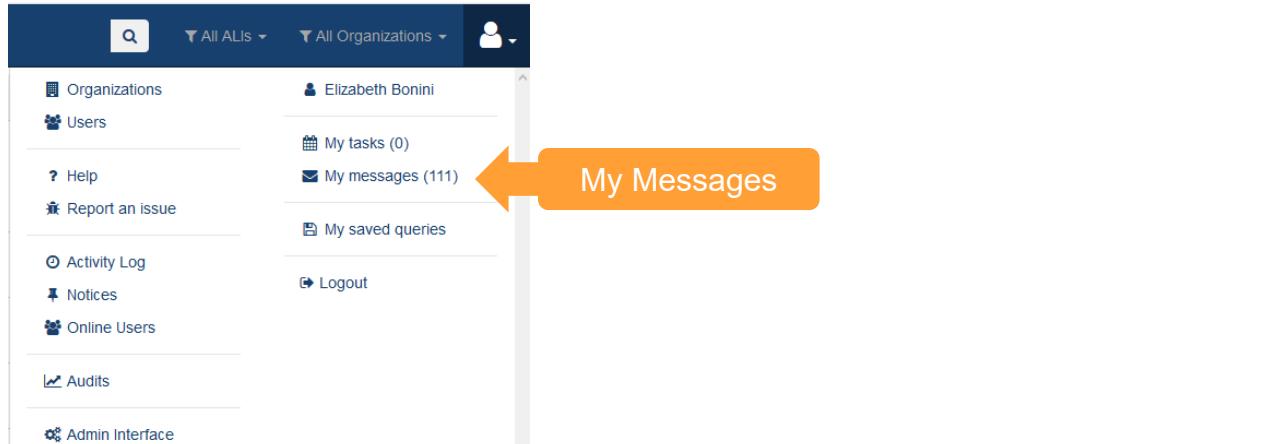
Figure 9 Filter Icon



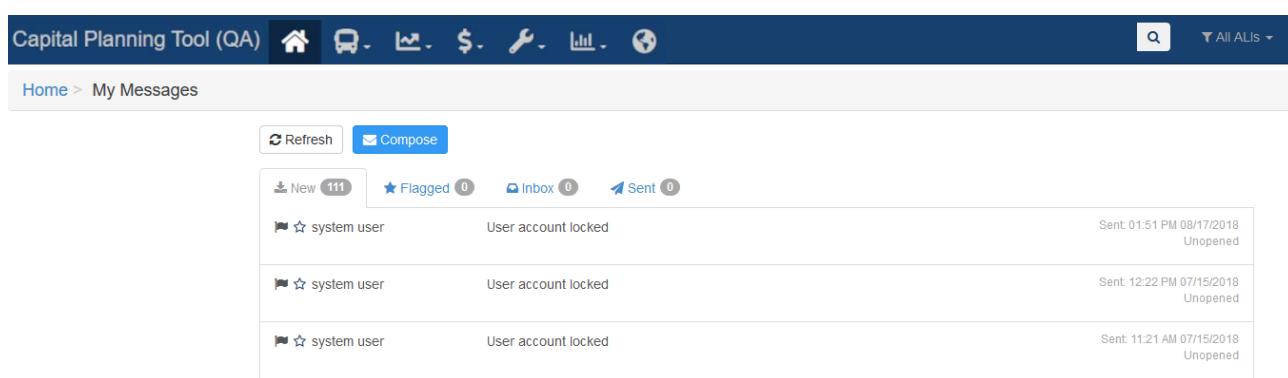
3.3 Messages

You can access Messages through the User Profile drop down menu. Users are able to send and receive messages to one or more users through the interface.

**Figure 10 User Profile
Messages**



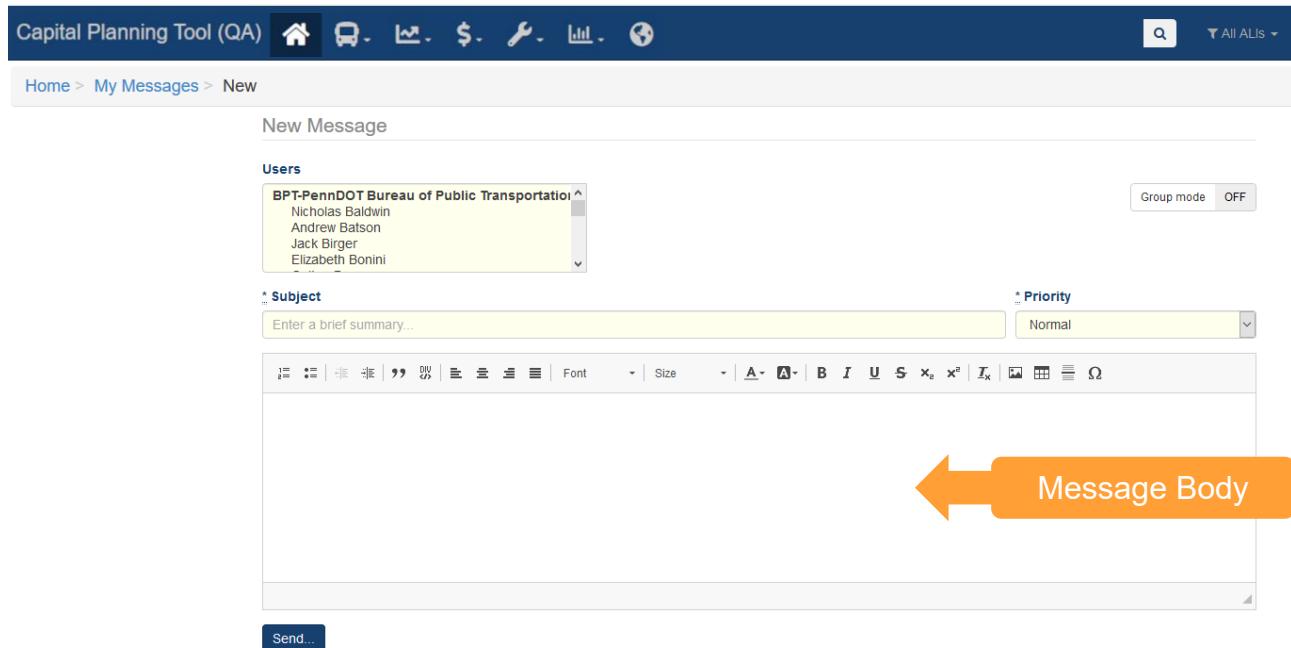
The screenshot shows the CPT User Profile page. On the left is a sidebar with various links: Organizations, Users, Help, Report an issue, Activity Log, Notices, Online Users, Audits, and Admin Interface. On the right, under the user profile section, there are links for Elizabeth Bonini: My tasks (0), My messages (111), and My saved queries. A large orange arrow points from the text 'My Messages' in the caption to the 'My messages (111)' link.



The screenshot shows the 'My Messages' inbox page. At the top, there are buttons for Refresh, Compose, New (111), Flagged (0), Inbox (0), and Sent (0). Below these are three messages from 'system user': 1. 'User account locked' (Sent: 01:51 PM 08/17/2018, Unopened). 2. 'User account locked' (Sent: 12:22 PM 07/15/2018, Unopened). 3. 'User account locked' (Sent: 11:21 AM 07/15/2018, Unopened).

Figure 11 Messages

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

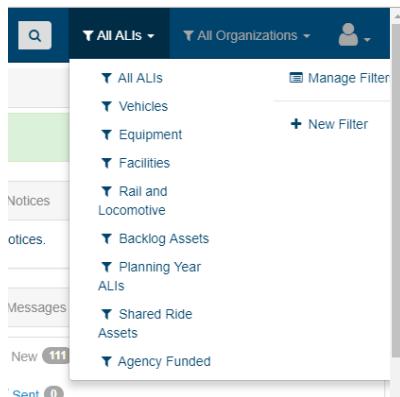
Figure 12 Message Interface

3.4 Activity Line Item (ALI) Filter

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

Figure 13 ALI Filter

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

Figure 14 ALI Filters

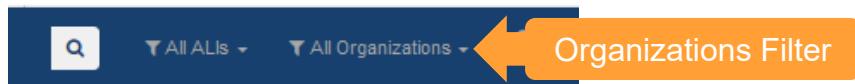
To create a new filter, select "New Filter" and specify the details required.

Figure 15 New ALI Filter

The screenshot shows the 'New ALI Filter' page in the Capital Planning Tool (CPT). The left side has sections for 'Details' (Name, Description, Shared With), 'Parameters' (Type, SOGR, Scope, Project Location), and asset filtering (Asset Type, Asset Subtype, Owner, Funding, Backlog). Buttons at the bottom include '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

The screenshot shows a sidebar titled 'All Organizations' with various filters. At the top right of the sidebar is a blue button labeled 'Update Selection'. An orange callout bubble with a black arrow points to this button from the right, containing the text 'Update Your Organization Selections'.

- All Organizations
- All Organizations + MPOs/RPOs
- All Transit Agencies
- Rural
- Rural/Shared Ride providers
- Rural/Urban/Shared Ride providers
- Shared Ride
- Urban
- Urban/Shared Ride providers
- FRITS

Update Selection

Select All

- BPT
- ACTS
- AMTRAN
- ATA
- BARTA
- BCT
- BCTA
- BMC
- BSS
- BTA
- BUTLER
- CADDON

unopened 18 18

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

The screenshot shows the top navigation bar of the Capital Planning Tool. On the far right, there is a search bar with a placeholder 'keywords...' and a magnifying glass icon. An orange callout bubble with a black arrow points to the search input field, containing the text 'Persistent Search Box'.

Capital Planning Tool (QA)

keywords... All ALIs All Organizations

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.

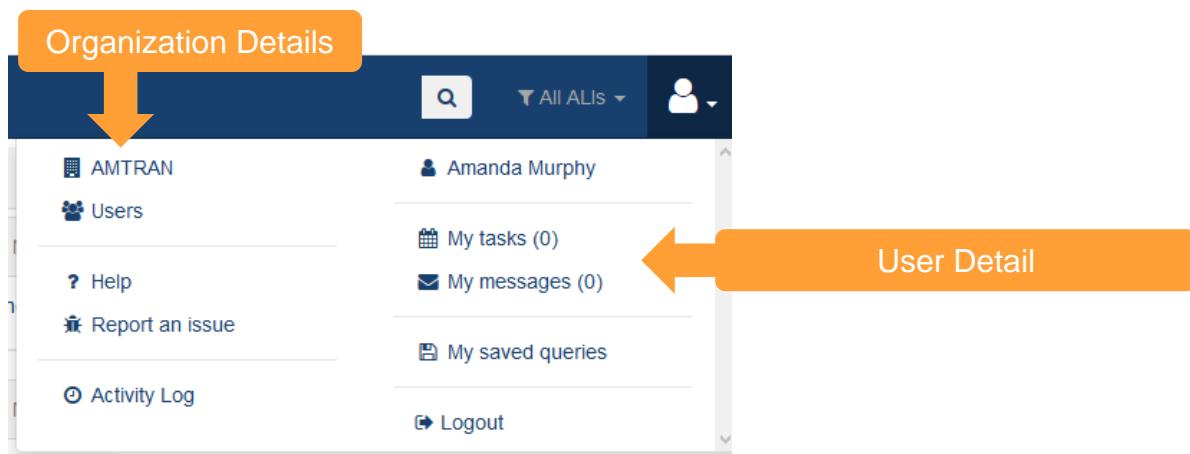
Figure 19 User Menu

The screenshot shows the top navigation bar of the Capital Planning Tool. On the far right, there is a user menu icon (a person symbol). An orange callout bubble with a black arrow points to this icon, containing the text 'User Menu'.

Capital Planning Tool (QA)

keywords... All ALIs All Organizations

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

Figure 20 User Menu Dropdown

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

Figure 21 Organization Details

The screenshot shows the 'Organization Details' page for 'AMTRAN'. The page has the following structure:

- Header:** Capital Planning Tool (QA) with various icons.
- Breadcrumbs:** Home > Organizations > Transit Operators > AMTRAN.
- Actions:** A dropdown menu for 'Altoona Metro Transit' with options: 'Update this organization' (checked) and 'Add a user'.
- Asset Summary:** Includes a pie chart showing asset distribution by type and a table of vehicle types with their counts and percentages.
- Table:** A table showing the count and percentage of different vehicle types.

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

Figure 22 Profile Details

The screenshot shows the 'My Profile' section of the Capital Planning Tool (QA). At the top, there's a navigation bar with icons for Home, Bus, Map, Money, and Notifications. Below that is a breadcrumb trail: Home > Users > My Profile. The main area displays a user profile for 'Amanda Murphy' with a blue placeholder icon. To the right of the profile picture are tabs for 'Corporate' and 'System Settings'. A dropdown menu titled 'Actions' is open, showing options like 'Assign myself a task', 'Update my profile picture', 'Update my settings', 'Update my profile', and 'Change my password'. An orange arrow points from the text 'Edit Profile Details' to this dropdown menu. On the right side of the screen, there's a sidebar with organization information: AMTRAN, 3301 Fifth Avenue, Altoona, PA, 16601-1801, and phone number (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**.

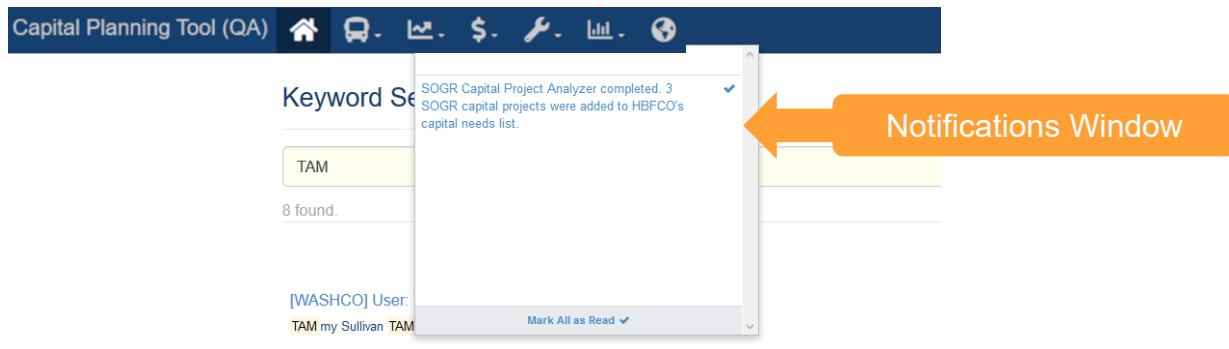
Any information provided will be reviewed by a product manager and someone may get in touch with you to discuss your comments.

* Issue Type	* Web Browser Type
<input type="text"/>	<input type="text"/>
* Comments	
<input type="text" value="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 Updates, User Guide, and User Guide Videos

In the footer you can find recent updates to TransAM, a link to this User Guide, and Links to the User Guide Videos.

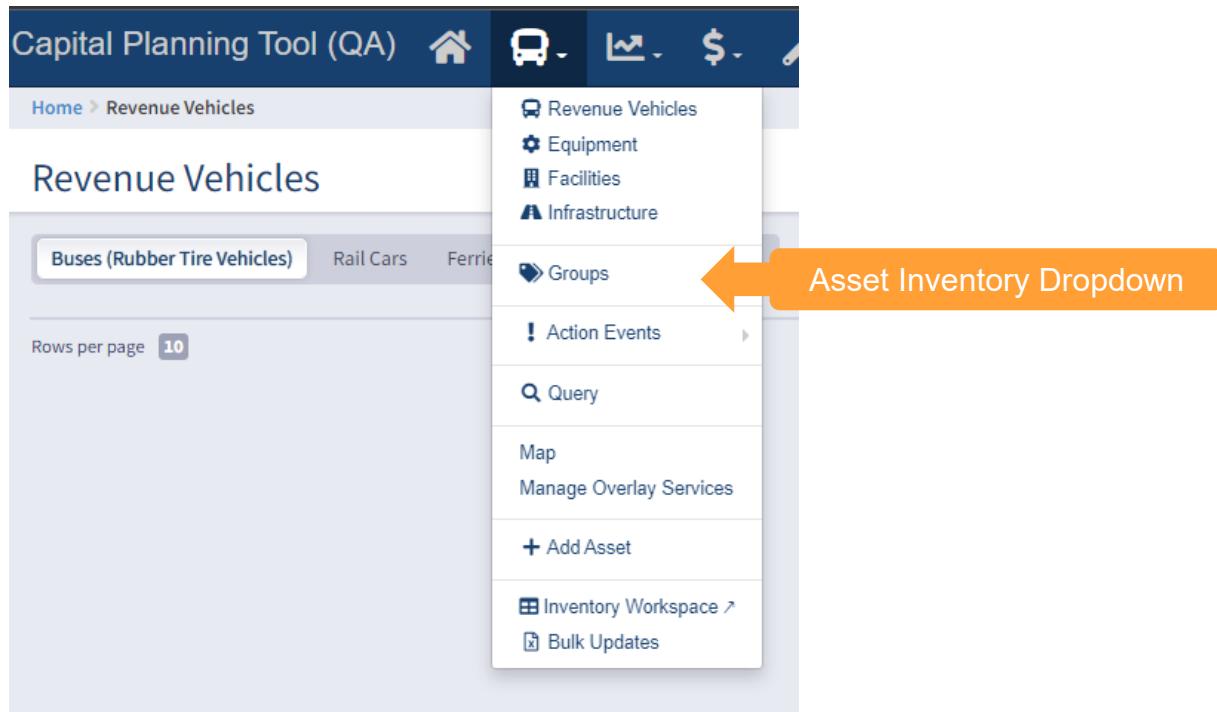
Figure 25 Updates, User Guide, and User Guide Videos



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.

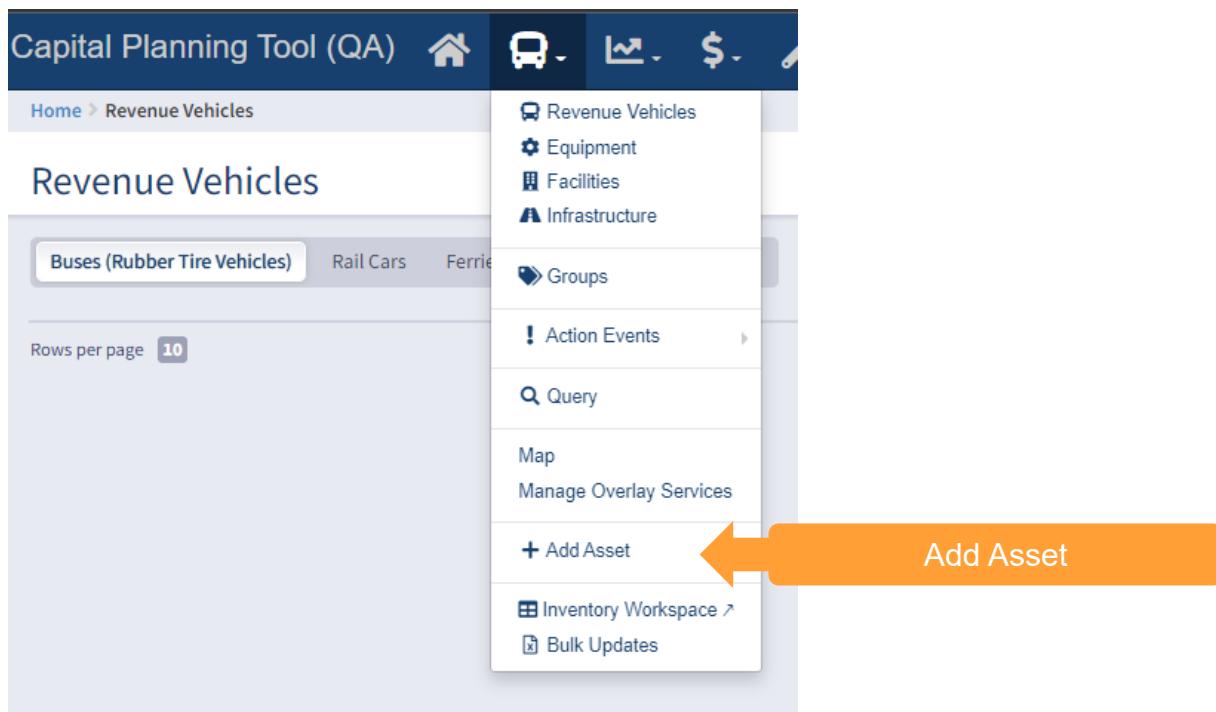
Figure 26 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 27 Adding an Asset



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

Figure 28 Select the Organization and Asset Class

Capital Planning Tool (QA) Home Add Asset New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

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

Figure 29 Adding Asset Required Details

Capital Planning Tool (QA) Home Add Asset Required Fields Recommended Fields ?

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 30 Add the Asset and Go To The New Record

The screenshot shows the Capital Planning Tool (CPT) interface. On the left, there is a form for entering asset funding details, including fields for Cost (Purchase), Funding Type, Direct Capital Responsibility, Percent Capital Responsibility, and Ownership Type. On the right, there is a form for asset operations, including fields for Seating Capacity (ambulatory), Standing Capacity, ADA Accessibility, In Service Date, Primary Mode, Service Type (Primary Mode), and Dedicated Asset status. At the bottom left, there is a button labeled '+ Add Asset & Go to New Record'. An orange callout bubble with an arrow points to this button, highlighting it.

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

Figure 31 Existing Asset Interface

The screenshot shows the Capital Planning Tool (CPT) interface with 'Revenue Vehicles' selected in the header. Below the header, there is a navigation bar with links for Home, Revenue Vehicles, and other categories like Rail Cars, Ferries, and Other Passenger Vehicles. The main area displays a table of existing assets, with the first row selected. The table has columns for Asset ID, Organization, Class, VIN, Manufacturer, Model, Year, Type, Subtype, Service Status, Last Life Cycle Action, and Life Cycle Action Details. The table shows various bus models from manufacturers like CMC, Freightliner, Ford, and Gillig, with service statuses ranging from Disposed to Condition. At the bottom of the table, there are pagination controls and a note indicating 1 to 10 of 8,862 rows.

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

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 32 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 33 Asset Record: Profile and Summary

4.3 Editing or Updating Existing Asset Profile Data

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

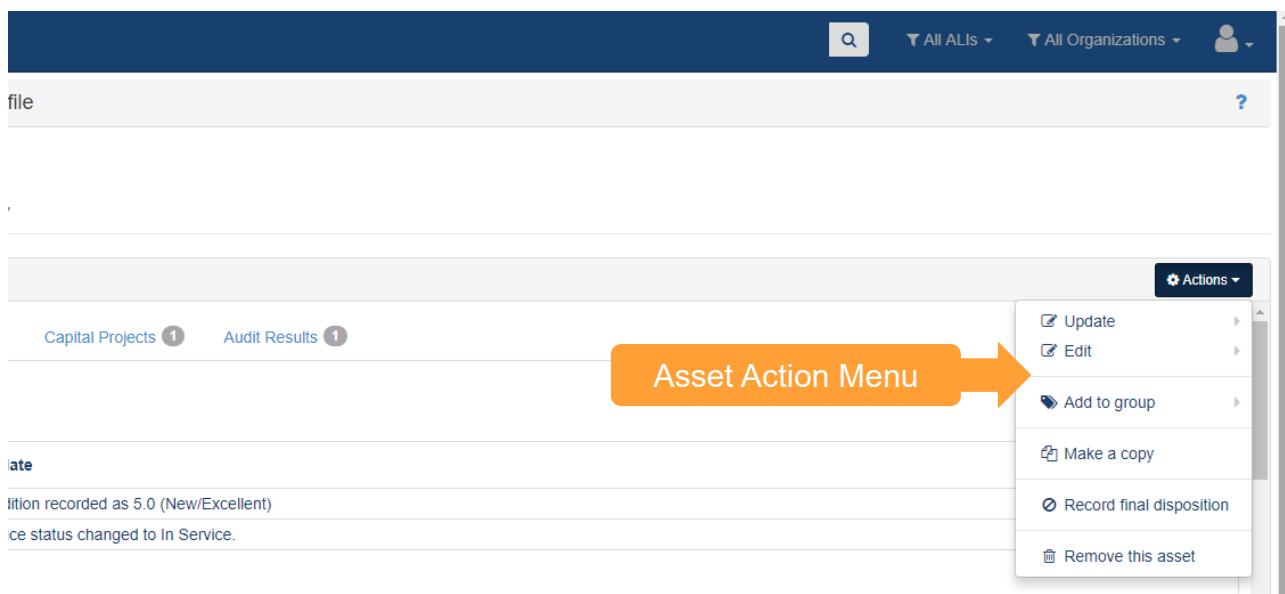
Figure 34 Editing the Profile of an Existing Asset

4.4 Updating Existing Asset Lifecycle Data

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

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

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

Figure 35 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 36 Asset Action Events (Disposition and Transfer)

The screenshot shows the Capital Planning Tool (CPT) dashboard. On the left, there's a sidebar with 'Asset Summary' and a table of assets categorized by Type (e.g., ACTS Revenue Vehicles, ACTS Support Facilities) and Avg. Age. In the center, there's a 'Capital Projects' section with a table showing Agency (ACTS, AMTRAN), Num. Projects (2), and Cost (\$230,000). To the right, there's a 'My Notices' section with a list of notices. A large orange arrow points from the text 'Action Events Menu' to a dropdown menu in the top right corner of the central area, which contains options like 'Early Disposition Proposed' and 'Newly Transferred Assets'.

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 and transfer requests can be reviewed from the Early Disposition/Transfer page. Select the asset, then in the actions menu, select the button to Approve or Reject.

Figure 37 Early Disposition/Transfer Requests

The screenshot shows the Capital Planning Tool (CPT) interface for a bus asset. The asset details are: Owner (CCTA), Description (GIL Low Floor), Asset Tag (105), Class (Revenue Vehicles), Type (Bus Std 35 FT), and Status (In Service). An orange arrow points from the text 'Approve or Reject' to a dropdown menu titled 'Actions' that appears over the asset details. The menu contains four items: 'Update this record', 'Remove this record', 'Approve', and 'Reject'. The 'Approve' option is highlighted with a blue background.

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 38 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 'Asset Summary' section contains a table with columns 'Type' and 'Avg. Age'. The right side of the screen has a sidebar with categories like 'Revenue Vehicles', 'Equipment', 'Facilities', 'Infrastructure', 'Groups', 'Action Events', 'Map', and 'Manage Overlay Services'. Below these is a 'Bulk Updates' section with a table showing 'File Name', 'Content', 'Loaded By', 'Status', 'Num Rows Processed', and 'Num Rows Added'. An orange arrow points from the 'Bulk Updates' section towards the center of the page, and another orange box highlights the 'Bulk Updates' section title.

File Name	Content	Loaded By	Status	Num Rows Processed	Num Rows Added
PIKECO_transit_inventory_updates_file_handler_2018-04-17.xlsx	Inventory Updates	Toni Marino	Complete	30	30
END	Inventory Updates	BETHANY JONES	Complete	84	84
WBT	IT_EQUIPMENT_UPDATE.xlsx	BETHANY JONES	Complete	84	84

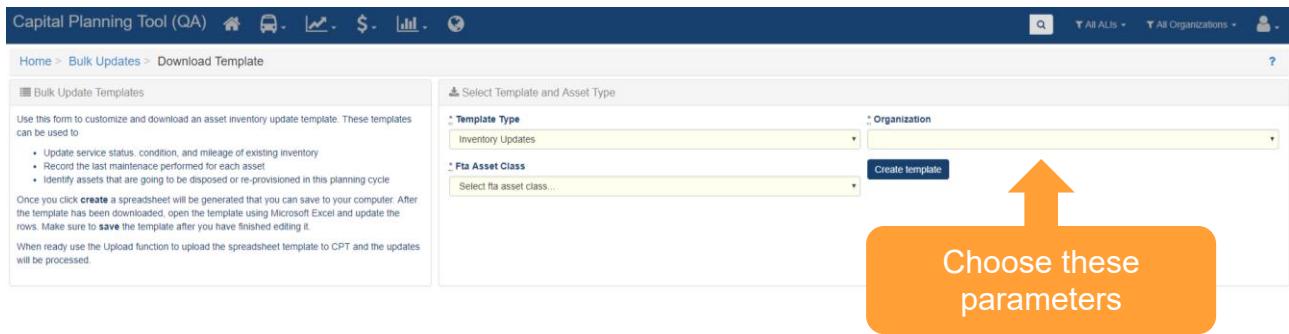
Selecting “Bulk Updates” allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

Figure 39 Bulk Update Tools

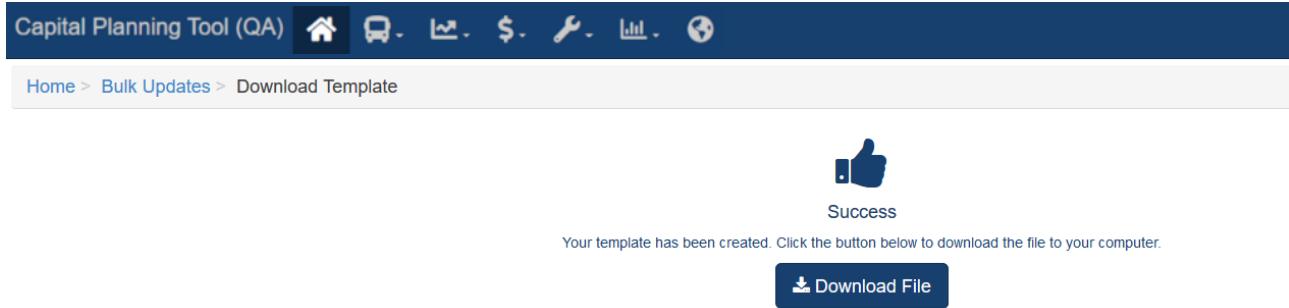
The screenshot shows the 'Bulk Updates' page. At the top, there are buttons for 'Create a new Template', 'Upload a Template', and 'Filter Status'. An orange arrow points upwards from the bottom of the 'Bulk Update Tools' section towards the 'Create a new Template' button. The main area displays a table with columns 'Agency', 'File Name', 'Content', 'Loaded By', 'Status', 'Num Rows Processed', and 'Num Rows Added'. The table shows three rows of data corresponding to the entries in Figure 38.

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

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

Figure 40 Bulk Update Details

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

Figure 41 Bulk Update Spreadsheet Download

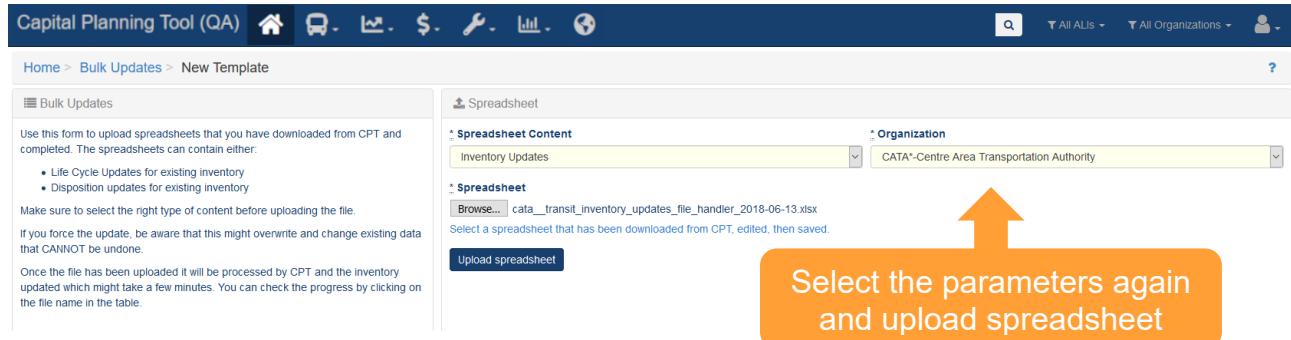
Edit the resulting spreadsheet and make sure you save your changes.

Figure 42 Bulk Update Spreadsheet

Asset	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
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	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	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	Bus 30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018			1.00	01
6	A2E18C47GK4	ATA	706	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090105	In Service	01/23/2018			1.00	01
7	A2E18C47M4FE	ATA	707	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090106	In Service	01/23/2018			2.00	01
8	A2E18C56GK2	ATA	708	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090107	In Service	01/23/2018			2.00	01
9	A2E18C665JDK	ATA	709	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090108	In Service	01/23/2018			2.00	01
10	A2E18C69PBLB	ATA	710	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090109	In Service	01/23/2018			2.00	01
11	A2E18C79LH24	ATA	711	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE291951090110	In Service	01/23/2018			2.00	01
12	A2E18C800038	ATA	712	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091506	In Service	01/23/2018			2.00	01
13	A2E18C817GK2	ATA	713	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091506	In Service	01/23/2018			2.00	01
14	A2E18C891ISGC	ATA	714	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091507	In Service	01/23/2018			2.00	01
15	A2E18C935EM0	ATA	715	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091508	In Service	01/23/2018			2.00	01
16	A2E18C9AA1IM4	ATA	716	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091509	In Service	01/23/2018			2.00	01
17	A2E18CB0HDPC	ATA	717	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091510	In Service	01/23/2018			2.00	01
18	A2E18CBE5MK0M	ATA	718	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091511	In Service	01/23/2018			2.00	01
19	A2E18CG4N614	ATA	719	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271981091512	In Service	01/23/2018			2.00	01
20	A2E18GCL0KL2	ATA	720	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091652	In Service	01/23/2018			2.00	01
21	A2E18GDB897DK	ATA	721	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091653	In Service	01/23/2018			2.00	01
22	A2E18GE07EKK	ATA	722	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091654	In Service	01/23/2018			2.00	01
23	A2E18GEF3ECK	ATA	723	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091655	In Service	01/23/2018			2.00	01
24	A2E18GF54C00	ATA	724	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091656	In Service	01/23/2018			2.00	01
25	A2E18GFNSG4	ATA	725	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091657	In Service	01/23/2018			2.00	01
26	A2E18GG6K040	ATA	726	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091658	In Service	01/23/2018			2.00	01
27	A2E18GGG3JG	ATA	727	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091659	In Service	01/23/2018			2.00	01
28	A2E18GHBAIB0	ATA	728	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091660	In Service	01/23/2018			2.00	01
29	A2E18GHKA070	ATA	729	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091661	In Service	01/23/2018			2.00	01
30	A2E18GIA78K	ATA	730	Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gilig 29LF	IGGE271991091662	In Service	01/23/2018			2.00	01
31	A2E18GIN06GM	ATA	750	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29165111645	In Service	01/23/2018			2.00	01
32	A2E18GUFCFK1	ATA	751	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291851111646	In Service	01/23/2018			2.00	01
33	A2E18GK1M4N8	ATA	752	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X5111647	In Service	01/23/2018			2.00	01
34	A2E18GL0K4	ATA	753	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29151111648	In Service	01/23/2018			2.00	01
35	A2E18GL48C44	ATA	754	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB27191079888	In Service	01/23/2018			2.00	01
36	A2E18GLUHAE	ATA	755	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGB27191079889	In Service	01/23/2018			2.00	01
37	A2E18GMNPW4	ATA	756	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gilig 35'	IGGR27191A1178187	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 43 Bulk Update Upload



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

Figure 44 Bulk Upload Processing

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

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

Figure 45 Bulk Update Edit

Capital Planning Tool (QA) Home Bus Inv \$ F U Globe

Home > Bulk Updates > cata__transit_inventory_updates_file_handler_2018-06-13.xlsx

Name	cata__transit_inventory_updates_file_handler_2018-06-13.xlsx	Actions
Content	Inventor...	Resubmit this file
Uploaded By	Elizabeth...	Download this file
Upload Time	04:36 PM 06/13/2018	Undo changes
Status	Completed	Remove this file

Processing Process Log Updates

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

4.7 Query

The system has the ability to query the database of all assets for those matching specific search criteria.

Figure 46 Asset Query

Capital Planning Tool (QA) Home Bus Inv \$ F

Home > Revenue Vehicles

Revenue Vehicles

Buses (Rubber Tire Vehicles) Rail Cars Ferries

Rows per page: 10

Revenue Vehicles
Equipment
Facilities
Infrastructure
Groups
Action Events
Query

Map
Manage Overlay Services
+ Add Asset
Inventory Workspace Bulk Updates

From the Query screen, you can select a variety of different attributes and narrow down the scope of your search.

Figure 47 Query Details

Click the headers to enable more search fields

Types & Subtypes

Select Asset Type(s)

Type

Any... Revenue Vehicles Stations/Shops/Terminals Support Facilities

Asset Subtype

Any... Revenue Vehicles Bus Std 40 FT Bus Std 35 FT

Operational Status

Any...

Common Fields

Vendor & Manufacturer Information

Vendor

Any... Hetch Fleet Services ? (Unknown)

Funding Program

Any... UA-Urbanized Area Formula Program OF-Other Federal funds NFPA-Non-Federal public funds

Service Status

Any... In Service Out of Service Spare

In Service Date

After mm/dd/yyyy

Manufacturer

Any... AAA-Allen Ashley Inc. (Vehicles) AAA-Allen Ashley Inc. (Locomotives) AAA-Allen Ashley Inc. (Support Vehicles)

Reported Condition Type

Any... Unknown Poor Marginal

Purchase Date

After mm/dd/yyyy

Disposition Date

After mm/dd/yyyy

Scheduled Replacement Year

During FY YYYY - YYYY

Policy Replacement Year

During FY YYYY - YYYY

Manufacturer Model

Enter The Manufacturer Model

Purchase Cost

Equal To

In Backlog

Purchased New

Book Value

Equal To

Scheduled for Early Replacement

Disposed Early

Direct Capital Responsibility

Percent Capital Responsibility

Equal To

Query Reset

Filter your query down and press the query button at the bottom. You can reset all the filters by pressing reset.

Figure 48 Saved Queries

Query Parameters

Actions

Save selection as a group
Save query parameters

Access Saved Queries

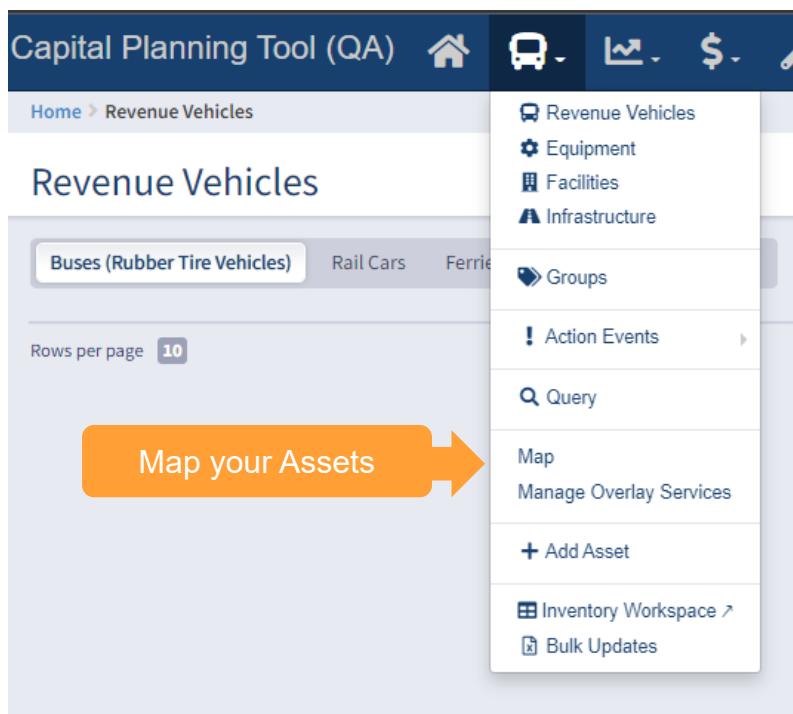
Agency	Type	Asset Tag	Description	Parent	Location	Status	Age	Condition	Rehab	Replace	Vendor	Book Value
PAAC	Bus Maintenance Equipment	000021955-00	TEST BENCH-TEST BENCH AIRTEK		D	25	1.0	-		FY 18-19	-	\$0
PAAC	Bus Maintenance Equipment	000022065-00	TEST EQUIP-TEST EQUIP - IR SERVICE MONIT		I	24	1.0	-		FY 18-19	-	\$0
PAAC	Bus Maintenance Equipment	000023399-00	BATTERY TESTER-TESTER BATTERY IMPEDENCE S#257		I	25	1.0	-		FY 18-19	-	\$0
PAAC	Bus Maintenance Equipment	000044073-00	ALTERNATOR TEST BENCH-ALTERNATOR TEST BENCH MARCH SHOP		I	5	2.0	-		FY 22-23	-	\$69,300
PAAC	Other Communications Equipment	000042644-00	RADIO TEST STATION-RADIO TEST STATION		D	27	1.0	-		FY 18-19	-	\$0

When you get to your results screen, you can save the selection of vehicles as a group or save your query parameters for a later query from the action menu at the top right.

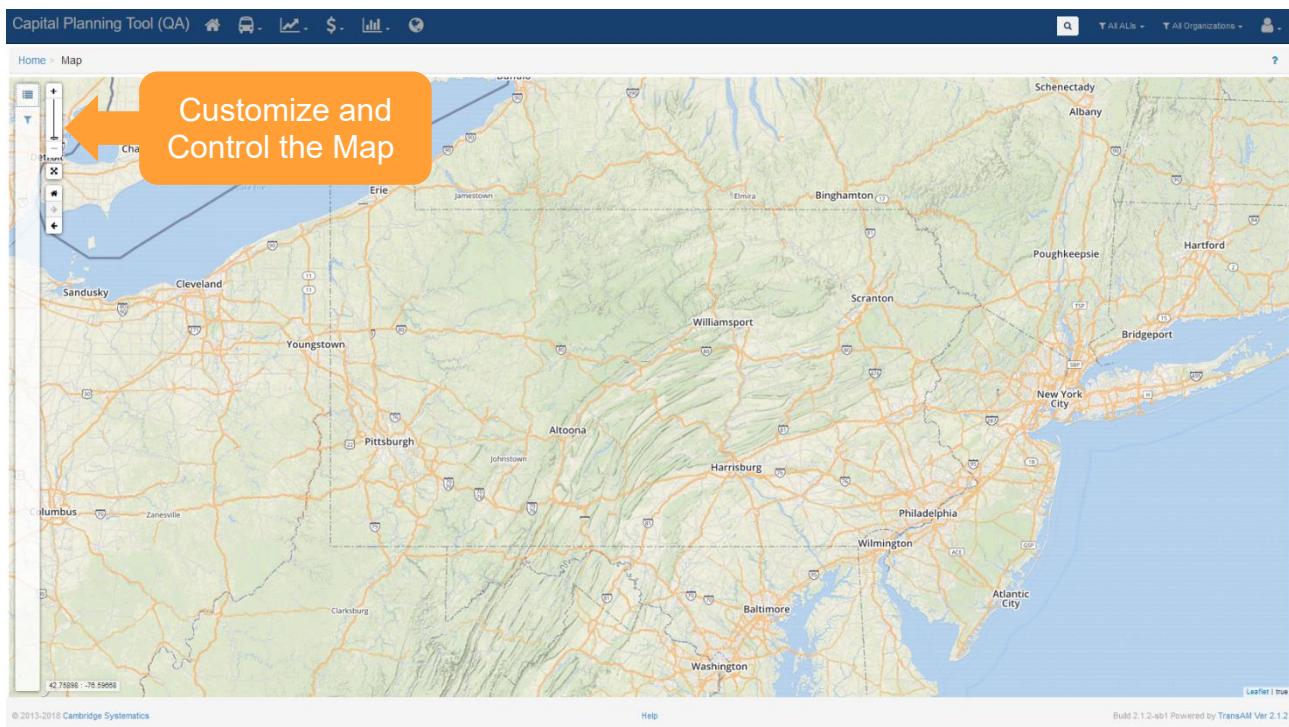
4.8 Map

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

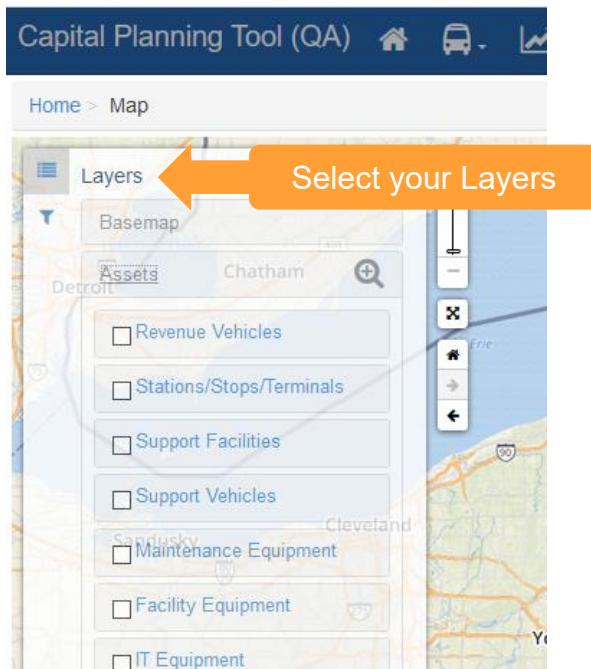
Figure 49 Asset Map



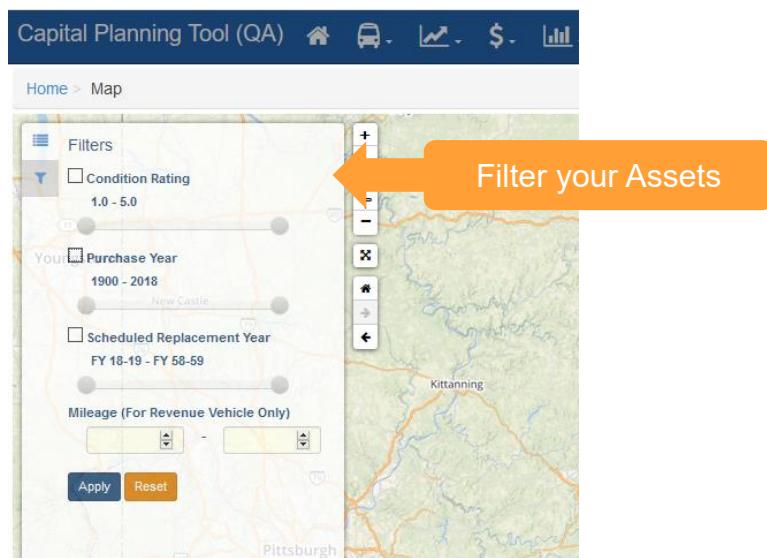
The map has several key features. You can customize the map from the two icons in the bar on the left of the map.

Figure 50 Map Customization

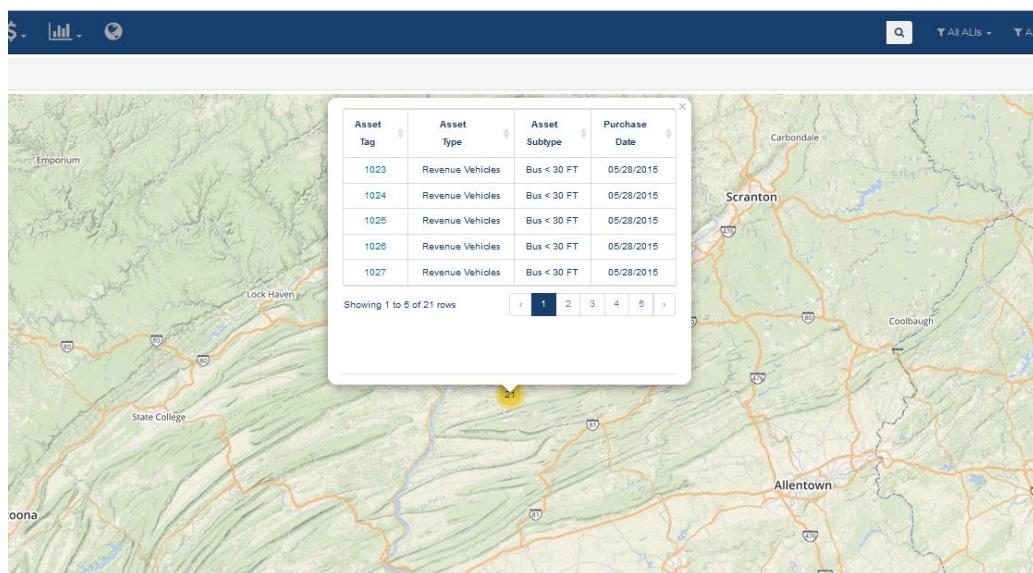
Clicking the top icon allows you to select which layers to display on the map. You can select a default map, the Esri streets map, the Esri Satellite map, or the Esri topographic map as your basemap. Clicking assets will allow you to specify which asset types you wish to display on the map.

Figure 51 Map Layers

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

Figure 52 Map Filter

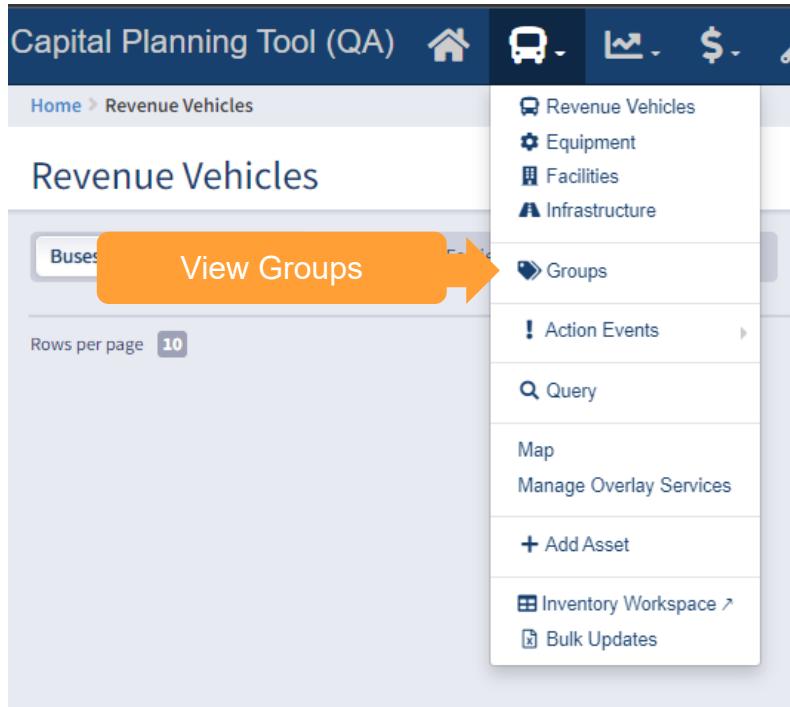
Once assets are displayed on the map, clicking a group of assets will provide summary information.

Figure 53 Map Asset Details

4.9 Groups

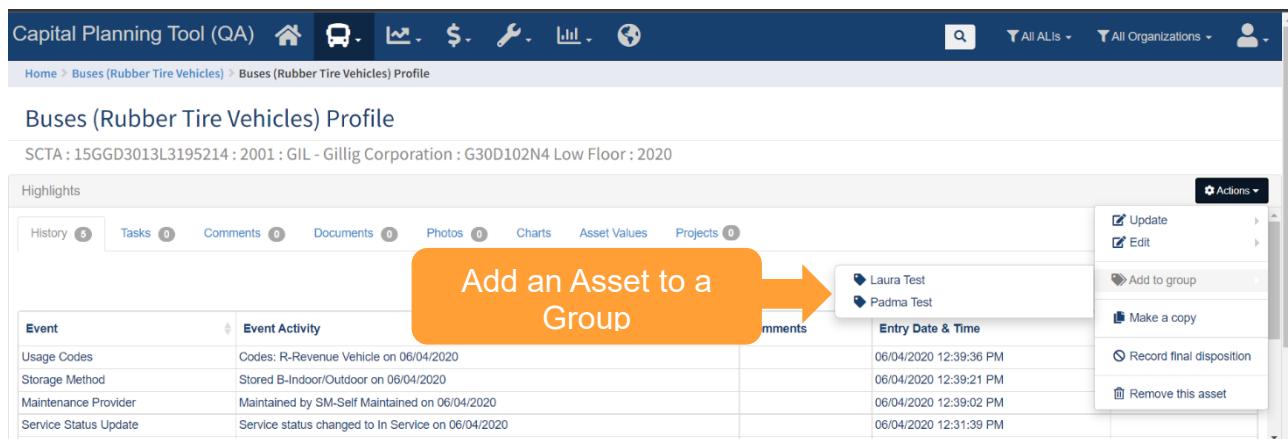
Agencies can create an on-the-fly collection of assets called groups so that they can quickly recall commonly viewed assets all at once. They can be accessed from the Asset Inventory Menu.

Figure 54 Asset Groups



Group details can be found in the group screen. Adding an asset to a group comes from the asset details action menu, as seen below.

Figure 55 Adding an Asset to a Group



5.0 Maintenance

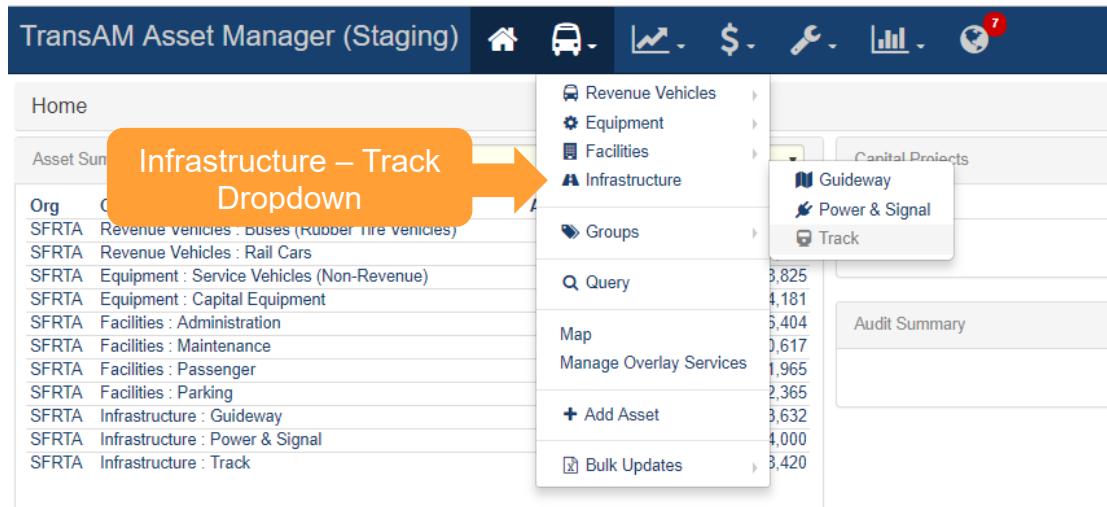
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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 56 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.

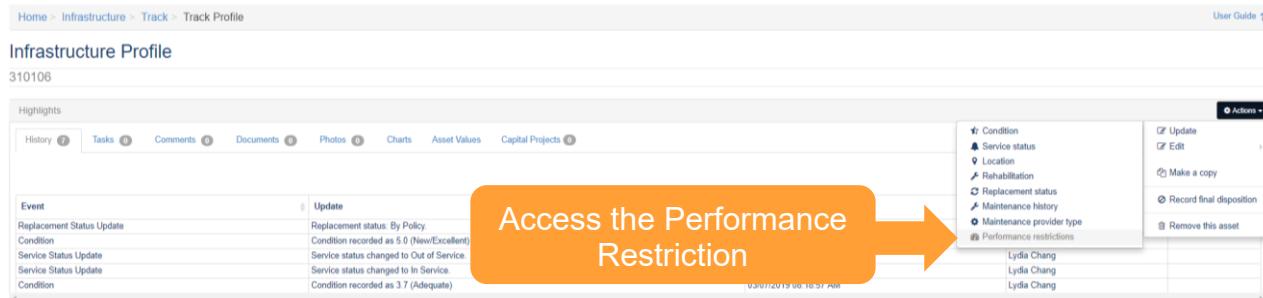
Figure 57 Existing Asset Interface : Infrastructure - Track

The screenshot shows a table of Infrastructure - Track records. An orange arrow points from the text 'Access the Infrastructure – Track Record' to the first row of the table. The table has columns for Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. The first few rows show records for South Florida Rail Corridor, each with different track numbers and descriptions.

Asset ID	Organization	Line (from)	From	Line (to)	To	Class	Subtype	Description	Main Line / Division	Branch / Subdivision	Track	Segment Type	Location	Last Life Cycle Action	Life Cycle Action Date	Status
310000	SFRTA								South Florida Rail Corridor	N/A	Main Line	Main Line	-	Service status	9/28/2018	In Service
310101	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310102	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310103	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310104	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Performance restrictions	3/6/2019	In Service
310105	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Rehabilitation	3/12/2019	In Service
310106	SFRTA								South Florida Rail Corridor	N/A	2	Main Line	-	Replacement status	3/12/2019	Out of Service
310107	SFRTA	SX	973.3	SX	974.3	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310108	SFRTA	SX	974.3	SX	974.4	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Service status	9/28/2018	In Service
310109	SFRTA	SX	974.4	SX	975.1	Track	Tangent (Straight)	N/A	South Florida Rail Corridor	N/A	2	Main Line	-	Performance restrictions	3/7/2019	In Service

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

Figure 58 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 59 Performance Restriction Lifecycle Event

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

Performance restrictions				
* Speed Restriction	* Unit			
79.0	mph			
* Period				
<input type="radio"/> Set Length				
<input checked="" type="radio"/> Until Removed				
* Segment Unit				
Marker Posts				
<input type="radio"/> Lat / Long				
<input type="radio"/> Chaining				
* Line	* From	* Line	* To	* Unit
SX	971.9	SX	975.3	mile
From (Location Name)		To (Location Name)		
<input type="text"/>		<input type="text"/>		
Associated Linear Asset Records				
310107	310108	310109	310110	310111
* Restriction Cause				
* Date of Performance Restriction 03/14/2019 07:13:32 PM				
Comments Enter any additional comments...				
Update Performance Restrictions				

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

Figure 60 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 several 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 61 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 entry. The 'Comments' column for the first row shows a 'Closeout' button.

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
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		Active	<button>Closeout</button>		
310104	SFRTA	N/A	Tangent (Straight)	SX	970.20	SX	970.40	2	30	mph	20	mph	Rail Defect	03/06/2019 09:52 AM	Until Removed	Lydia Chang	Active	<button>Closeout</button>		
311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 10:26 AM	Until Removed	Lydia Chang	Active	<button>Closeout</button>		
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	03/19/2019 11:19	Lydia Chang	Active	<button>Closeout</button>		
Multiple	SFRTA	Multiple	Multiple	SX	991.08	SX	992.00	Single	Multiple	mph	28	mph	Rail Defect	03/13/2019 02:18 PM	Until Removed	Lydia Chang	Active	<button>Closeout</button>		
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	<button>Closeout</button>		
Multiple	SFRTA	Multiple	Multiple	SX	969.10	SX	970.00	Single	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:22 PM	Until Removed	Lydia Chang	Active	<button>Closeout</button>		

Showing 1 to 7 of 7 rows

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 62 Policies Dropdown

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Asset Summary, Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. A large orange arrow points from the text "Policies Dropdown" to the Policies icon in the navigation bar. Below the navigation bar is a table titled "Asset Summary" showing various asset types like ACTS Revenue Vehicles, ACTS Support Facilities, AMTRAN Revenue Vehicles, etc., with columns for Type, Avg. Age, and Count. To the right of the table is a "Capitol Projects" section with a table showing data by Agency, Num. Projects, and Cost. At the bottom left is a "My Tasks" button.

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 63 Policy Rule Sets

The screenshot shows the Capital Planning Tool (QA) interface with the "Policies" selected in the navigation bar. The page title is "Home > Policies". There are two main sections: "Asset Replacement/Rehabilitation ..." and "TAM Policy". Each section has a sub-section below it. An orange arrow points from the text "Policy Rule Sets" to the TAM Policy section.

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.

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 64 Asset Replacement/Rehabilitation Policy Filters

The screenshot shows the CPT interface for managing asset replacement/rehabilitation policies. At the top, there are navigation links for Home, Policies, Asset Replacement/Rehabilitation Policy, and BPT Policy. Below the header, the title "Asset Replacement/Rehabilitation Policy" is displayed. A "Filters" section is present, with dropdown menus for "Organization" (set to BPT-PennDOT Bureau of Public Transportation) and "Policy Year" (set to FY 2017 Statewide Transit Policy (Current)). The main content area shows policy rules categorized by asset type: Support Facilities, Support Vehicles, Maintenance Equipment, Facility Equipment, IT Equipment, Office Equipment, Communications Equipment, Signals/Signs, and Rail Cars. Each category has specific settings like Service Life Calculation Method (e.g., Age Only or Age and Mileage), Repl. Cost Calculation Method (e.g., Purchase Price + Interest), and Condition Rollup Calculation Method (e.g., Weighted Average). Global parameters include Condition Threshold (2.50), Depreciation Calculation Type (Straight Line), and Depreciation Interval (Annually). An "Actions" button is located in the top right corner of the main content area.

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

Figure 65 Policy Rules

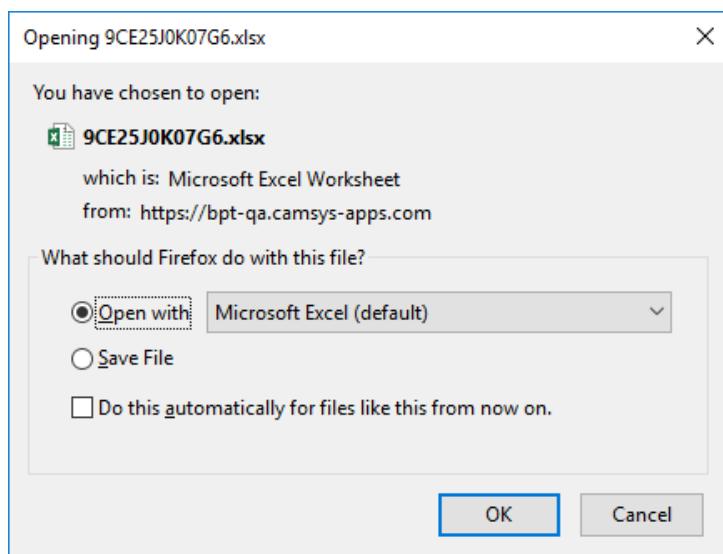
The screenshot shows the "Policy Rules Actions" dropdown menu. The menu items are: "Export rules to Excel", "Modify this policy", "Make a copy", and "+ Add an Asset Type Rule". The "Modify this policy" option is currently selected, indicated by a blue border around its icon and text.

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

Figure 66 Policy Rules Actions Dropdown

The screenshot shows the expanded "Actions" dropdown menu. The menu items are: "Export rules to Excel", "Modify this policy", "Make a copy", and "+ Add an Asset Type Rule". The "Modify this policy" option is currently selected, indicated by a blue border around its icon and text.

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

Figure 67 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 68 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 69 Copy Organization Policy Dialog

Update Policy

* Description
Copy of FY 2017 Statewide Transit Policy

* Condition Threshold
2.5

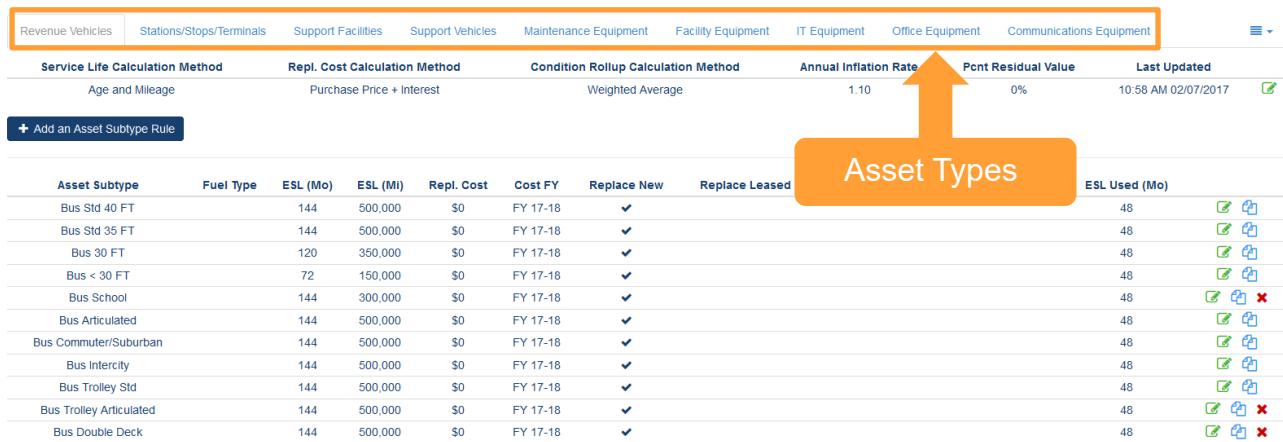
* Depreciation Calculator
Straight Line

* 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 70 Asset Types


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

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 71 Additional Assets Dropdown Icon

The Asset Type Rules are listed below the Asset Types.

Figure 72 Asset Type Rules

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

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

Figure 73 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

Asset Type

New Type

New Asset Type Name

New Asset Subtype Description

* Service Life Calculation Type

Age Only

* Replacement Cost Calculation Type

Replacement Cost

* Condition Rollup Calculation Type

Weighted Average

* Annual Inflation Rate

1.1

* Pcnt Residual Value

0

* Condition Rollup Weight

0

Save Cancel

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

Figure 74 Edit Icon



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

Figure 75 Modify Asset Policy Rule**Modify Rule: IT Equipment**

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

 * Annual Inflation Rate * Pcnt Residual Value * Condition Rollup Weight

 Save Cancel

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

Figure 76 Asset Type and Asset Subtype rules

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

Asset Subtype Rules

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

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

Figure 77 Add an Asset Subtype Rule Icon

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

Figure 78 Add an Asset Subtype Rule Dialog

Add an Asset Subtype Rule

Replacement

Asset Subtype
New Subtype

New Asset Subtype Name

New Asset Subtype Description

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

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

Replace Asset Subtype Replace Fuel Type

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

* Engineering Design Code * Rehabilitation Code

Save **Cancel**

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

Figure 79 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade

Replacement

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

* ESL Used (Mo) Lease Length Months
0 0

* Purchase Replacement * Lease Replacement Code
Code 12.26.06
12.22.06

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

Save **Cancel**

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

Figure 80 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.

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 81 TAM Policy Group Management

Select a Policy Year that you wish to view and click the “View” button. If a Policy Year does not exist or you need to create a policy for a new year, click the “Add New Policy Year” button and select the TAM Policy year you wish to create. The Period will populate based on individual client reporting period, based on initial system configuration. Below the Policy Year Filter, Group Management is performed on the chosen Policy Year.

Figure 82 TAM Policy Year

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

Figure 83 Add New TAM Policy Year

TAM Policy

Add New Policy Year

* Policy Year: 2022 Period: July - June

Copy Groups From Previous Policy Year

Yes No

Copying groups from the previous year, will save you the effort of recreating groups and performance measures

Save Cancel

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

Figure 84 Group Management Period and Year

Group Management : 2019 : July - June

Group Management by Period and Year

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

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

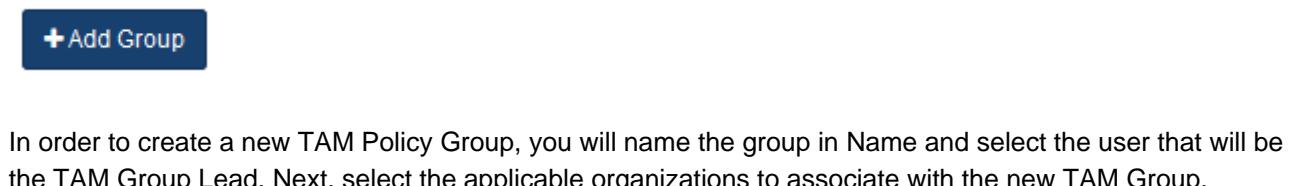
Figure 85 Add Group Button

Figure 86 Add TAM Group Dialog

The screenshot shows the 'Add TAM Group' dialog box. It includes fields for 'Name' (mandatory), 'TAM Group Lead' (dropdown menu), 'Organizations' (list box containing 'Amtrak Amtrak'), and 'Asset Categories' (checkboxes for Revenue Vehicles, Equipment, and Infrastructure). At the bottom are 'Save' and 'Cancel' buttons.

More than one organization can be selected by clicking in the Organization field. A dropdown will appear and you can select one or many organizations.

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

Once the new group is created, the Status is set to Inactive. You have the option to edit, delete or Generate that Group. Click "Generate" when you are ready to proceed and you will notice that the group Status will change to In Development. Clicking the "Generate" button adds the group to the Group Metrics tab, so the assigned TAM Group Lead can start the process of setting performance measures and editing rules for all organizations within the group. The Group Management tab, is only viewable and editable by users with the TAM Group Manager or Admin permission, and TAM Group Leads who can only access groups to which they have been assigned.

Figure 87 TAM Group Mangement Status

The screenshot shows a 'Group Management' table with the following data:

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

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

Figure 88 TAM Policy Group Metrics

Capital Planning Tool (QA) Home > Policies > TAM Policy > Group Metrics ? All ALIS < User

TAM Policy

Group Management **Group Metrics** Performance Measures

Filters

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

Select Policy Year, Group Name and click View

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

Figure 89 Editable and Locked Assets

Asset Category	Group Name	Group Status	Organizations	Copied From Previous Year																																			
Revenue Vehicles	New Group	In Development	View	No																																			
Revenue Vehicles																																							
Percentage of revenue vehicles that exceed the Useful Life Benchmark (ULB)																																							
<table border="1"> <thead> <tr> <th>Asset Class/Type</th> <th>ULB</th> <th>Editable/Locked</th> <th>Goal Pcnt</th> <th>Editable/Locked</th> </tr> </thead> <tbody> <tr> <td>AO-Automobile</td> <td>8</td> <td><input checked="" type="checkbox"/> Editable</td> <td>0</td> <td><input checked="" type="checkbox"/> Editable</td> </tr> <tr> <td>BU-Bus</td> <td>14</td> <td><input checked="" type="checkbox"/> Editable</td> <td>0</td> <td><input type="checkbox"/> Locked</td> </tr> <tr> <td>CU-Cutaway</td> <td>10</td> <td><input type="checkbox"/> Locked</td> <td>0</td> <td><input checked="" type="checkbox"/> Editable</td> </tr> <tr> <td>OR-Other</td> <td>0</td> <td><input checked="" type="checkbox"/> Editable</td> <td>0</td> <td><input checked="" type="checkbox"/> Editable</td> </tr> <tr> <td>SV-Sports Utility Vehicle</td> <td>8</td> <td><input checked="" type="checkbox"/> Editable</td> <td>0</td> <td><input type="checkbox"/> Locked</td> </tr> <tr> <td>VN-Van</td> <td>8</td> <td><input type="checkbox"/> Locked</td> <td>0</td> <td><input checked="" type="checkbox"/> Editable</td> </tr> </tbody> </table>					Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked	AO-Automobile	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable	BU-Bus	14	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked	CU-Cutaway	10	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable	OR-Other	0	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable	SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked	VN-Van	8	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable
Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked																																			
AO-Automobile	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable																																			
BU-Bus	14	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked																																			
CU-Cutaway	10	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable																																			
OR-Other	0	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable																																			
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked																																			
VN-Van	8	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable																																			

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

Figure 90 Asset Type Percentage Settings

Percentage of revenue vehicles that exceed the Useful Life Benchmark (ULB)				
Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
BU-Bus	14	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked
CU-Cutaway	10	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable
OR-Other	0	<input checked="" type="checkbox"/> Editable	0	<input checked="" type="checkbox"/> Editable
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	0	<input type="checkbox"/> Locked
VN-Van	8	<input type="checkbox"/> Locked	0	<input checked="" type="checkbox"/> Editable

Once completed, click the “Distribute” button to push the group metrics over to the Performance Measures tab for each organization within the group. Each group within a Policy Year can be distributed on an individual basis. If all the Editable/Locked toggles were in a state of “Locked” for every asset within each

Asset Category for a group, the status for each organization's Performance Measures will automatically update to Active status. If at least one Editable/Locked toggle is in a state of "Editable," each organization will need to manually Activate the metrics on the Performance Measures tab.

Figure 91 Distribute TAM Policy

TAM Policy

Group Management Group Metrics Performance Measures

Filters

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

Group Metrics : 2018 : July - June : New Group

Distribute

Asset Category Group Name Group Status Organizations Copied From Previous Year

Revenue Vehicles	New Group	In Development	View	No
------------------	-----------	----------------	----------------------	----

Revenue Vehicles

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

Asset Class/Type	ULB	Editable/Locked	Goal Pct	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 checked="" type="checkbox"/> Locked	10	<input checked="" type="checkbox"/> Locked
SV-Sports Utility Vehicle	8	<input checked="" type="checkbox"/> Editable	10	<input checked="" type="checkbox"/> Editable
VN-Van	8	<input checked="" type="checkbox"/> Editable	10	<input checked="" type="checkbox"/> Editable

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

Figure 92 Distributed TAM Policy

Capital Planning Tool (QA) [Home](#) [TAM](#) [TERM](#) [\\$](#) [Facilities](#) [Help](#)

TAM Policy

Group Management Group Metrics Performance Measures

Filters

* Policy Year 2018	Period July - June	View
-----------------------	-----------------------	----------------------

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

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

Group Status

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

Figure 93 TAM Policy Performance Measures

TAM Policy

Group Management Group Metrics **Performance Measures**

Performance Measures

Filters

* Policy Year: 2021 Period: July - June * Group Name: * Organization:

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 94 Policy Year Filters

Filters

* Policy Year: 2018 Period: July - June * Group Name: New Group * Organization: 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 95 Asset Type Percentage Settings

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

Revenue Vehicles

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

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

Figure 96 Activate Performance Measures

TAM Policy

Group Management	Group Metrics	Performance Measures
Filters * Policy Year: 2018 Period: July - June * Group Name: New Group * Organization: BCTA-Beaver County Transit Authority		
Performance Measures : 2018 : July - June : New Group : BCTA Asset Category: Facilities Group Name: New Group Agency Status: Pending Activation		
Facilities Asset Class/Type: Passenger TERM: 3 Editable/Locked: Editable Goal Pcnt: 0 Parking TERM: 3 Editable/Locked: Editable Goal Pcnt: 0		
 Activate		

7.0 Project Planning and Prioritization

An organization creates a 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 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.

The SOGR projects will automatically be generated by running the State of Good Repair Project Analyzer.

7.1 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

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

* Starting Fiscal Year

* Fta Asset Categories

Revenue Vehicles

Equipment

Facilities

Infrastructure

Run analyzer...

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

7.2 Scenarios

Each Transit Agency will create an individual 12-year capital application that will be submitted to PennDOT. This is done by agencies creating one or more scenarios for their capital application and then submitting a single scenario to PennDOT.

Scenarios are built using the SOGR builder or can be manually created within the scenarios interface.

Scenarios consist of five stages that must be completed in sequential order: Preparation, Unconstrained Plan, Funding, Constrained Plan, and Final Review. Each stage consists of a series of verifications and/or approvals. Once an organization’s data has been verified and approved through all five stages, a link to the export will display.

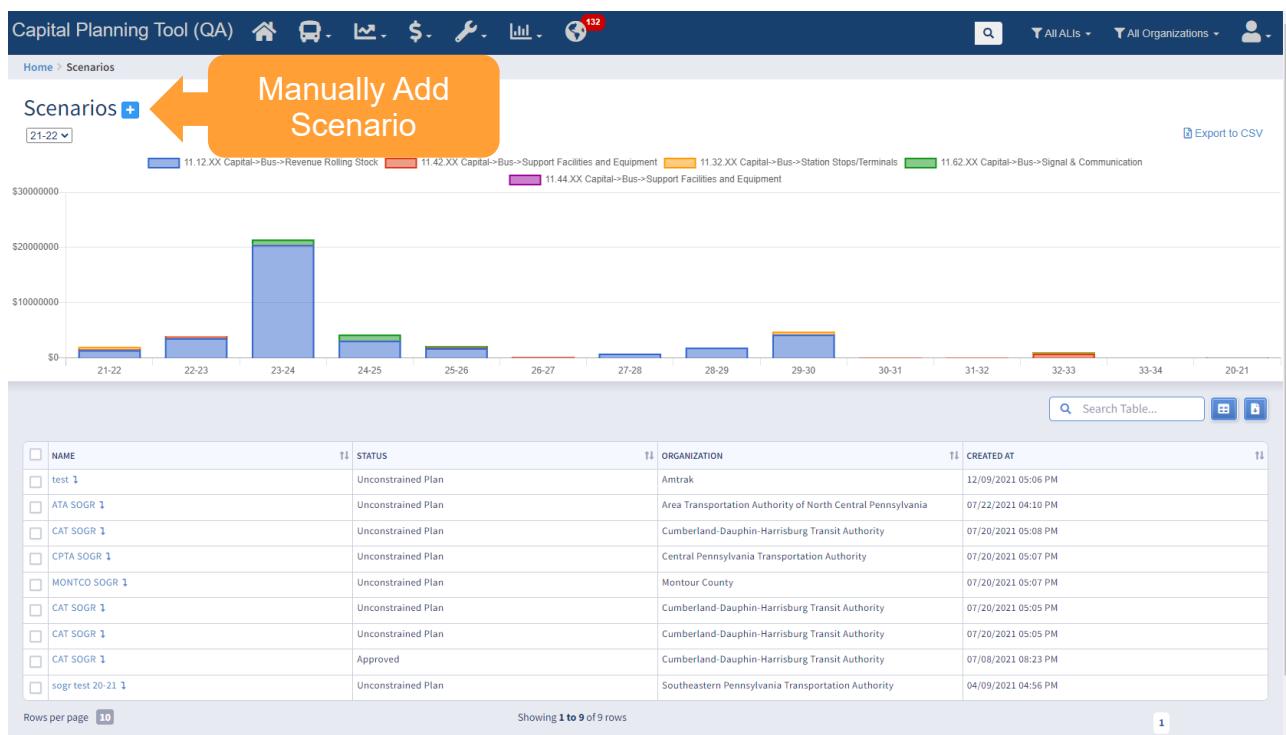
Figure 98 Scenario and Overall Workflow

PennDOT Annual Consolidated Capital Agreement



Each stage follows the same general formula—the submittal organization performs some work and the State approves that work. As each action is completed and approved, the next action will unlock.

Figure 99 Scenarios Interface



You can add a new scenario by clicking the blue plus icon next to the word scenarios. You can also modify an existing scenario (those made with SOGR will be labeled so).

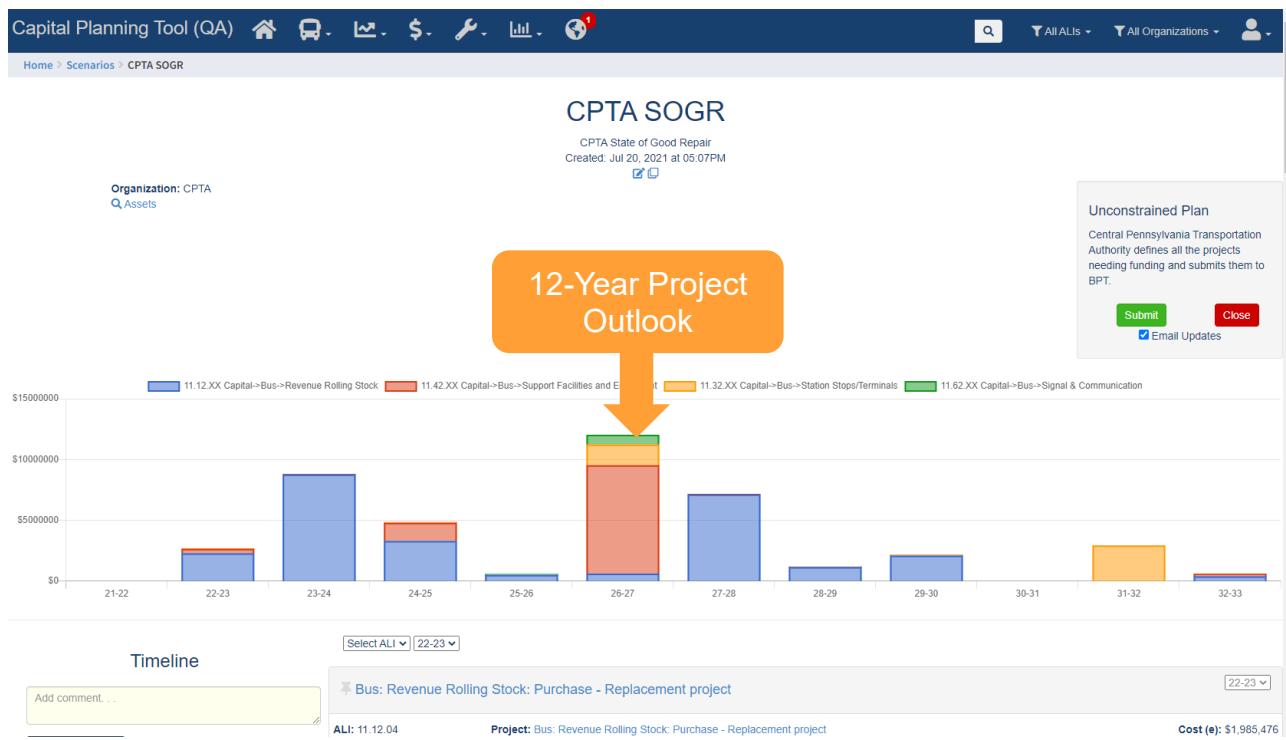
Figure 100 Add a New Scenario

The figure shows the Capital Planning Tool (CPT) New Scenario form. It includes fields for Name, Fiscal Year (21-22), Ending Fiscal Year (21-22), Description, and Organization. A Save button is at the bottom.

If you run the SOGR project planner, you'll see a list of SOGR scenarios for each agency.

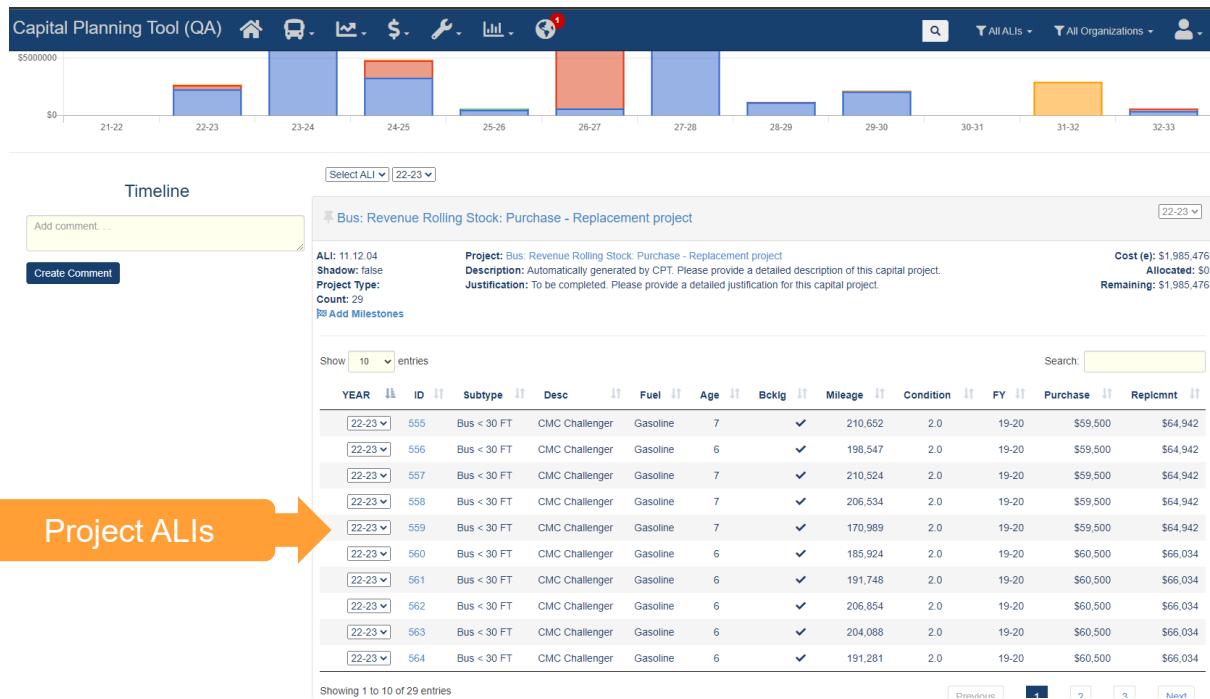
The first step is the unconstrained plan – think of this as a list of agency wants that may or may not eventually get funded.

Figure 101 Unconstrained Plan created by SOGR



In this unconstrained plan, you can see the 12-year project outlook and at the bottom, projects and the ALIs that comprise them.

Figure 102 ALIs in a Project in the Scenarios Interface



Clicking on a project title will allow you to update the project. Adding milestones is a required step. Click the button next to the milestone to save each – each will need to be saved independently.

Figure 103 Updating Project Milestones

The screenshot shows the 'Milestones' section of the Capital Planning Tool. It lists several milestones with their dates and comments, each followed by a 'Update Milestone' button. An orange callout bubble with the text 'Update Each Milestone Independently' has an arrow pointing to one of the buttons.

	Date	Comments	Action
Out for Bid			Update Milestone
Contract Award			Update Milestone
Notice to Proceed			Update Milestone
First Vehicle Delivered			Update Milestone
All Vehicles Delivered			Update Milestone
Contract Complete*	03/03/2022		Update Milestone

Above the milestones section of the project details is funding sources – these aren't required for the unconstrained plan but will be managed later in the constrained plan.

Figure 104 Project Funding Sources and Update Project Details

The screenshot shows the 'Bus: Revenue Rolling Stock: Purchase - Replacement project' details. It includes a summary of ALI, Count, Cost, Allocated, and Remaining values. Below this is a 'Funding' section with budget and allocation tables. An orange callout bubble with the text 'Edit Project Details' has an arrow pointing to the edit icon (pencil) next to the project name.

ALI: 11.12.04
Count: 29
Cost (e): \$1,985,476
Allocated: \$0
Remaining: \$1,985,476

Funding

Budget	Allocation
<input type="button" value="Federal Placeholder (Federal)"/> <input type="button" value="State Placeholder (State)"/> <input type="button" value="Local Placeholder (Local)"/>	80.0% 80.0% NaN% 96.775% 19.355% NaN% 100.0% 0.645% NaN%

Total: \$0

Funding Request

Clicking the edit button near the project name will allow you to edit project details. Updating or confirming the cost is a required step.

Figure 105 Edit Project Details and Cost

Capital Planning Tool (QA) Home Scenarios > CPTA SOGR > Bus: Revenue Rolling Stock: Purchase - Replacement project > Bus: Revenue Rolling Stock: Purchase - Replacement project

Name
Bus: Revenue Rolling Stock: Purchase - Replacement project

*** Cost**
1985476

Cost Justification

Count

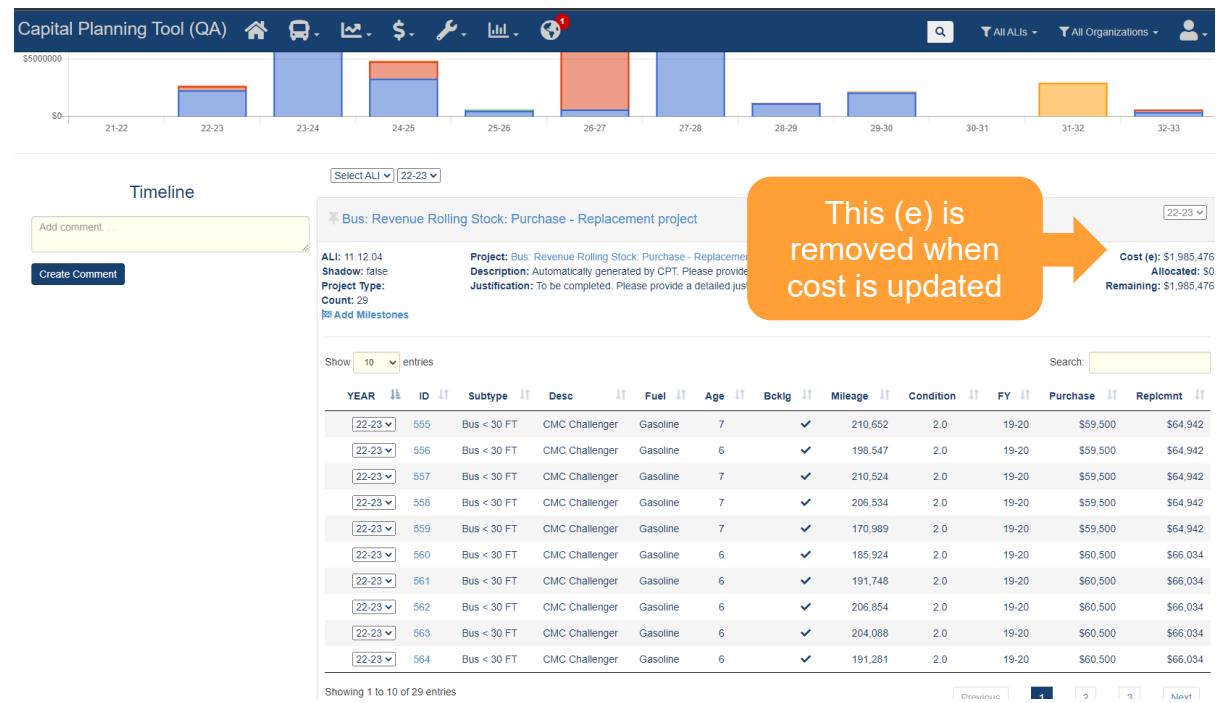
*** FY Year**
22-23

ALI Code
11.12.04 Bus < 30 Ft

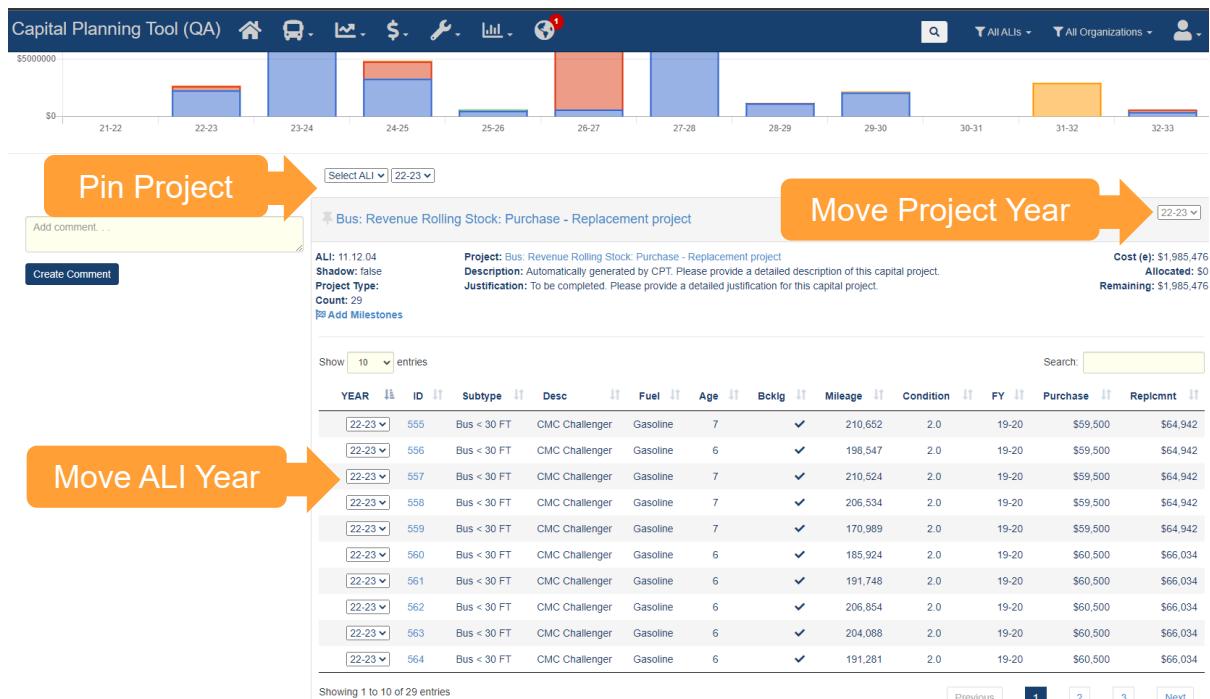
Save

Updating Cost is a Required Step!

Once the cost has been updated, the estimated costs will reflect that value and an “E” will be gone from the project estimated cost in the Scenarios overview’.

Figure 106 Estimated Cost is Updated

There are a few other features of the scenarios interface that are important to note. Both projects and ALIs have years associated with them and can be assigned different years. These projects can be moved via the year dropdown. The other option is pinning – which allows you to save a project between years even when re-running the SOGR project analyzer. The pinning functionality is similar to how it worked in the deprecated ‘Fund Projects’ interface.

Figure 107 Moving Years and Pinning

When an agency has gone through updating estimated costs and verifying the correct projects and ALIs are in place, they can submit their unconstrained plan to the parent agency to review.

Figure 108 Submit Unconstrained Plan

The unconstrained plan will then become a constrained plan, where the agency will add federal and local funding. In the projects area of the scenarios interface, the “Add Milestones” button has now been replaced with “\$ Update Funding” as a reminder for agencies to add the proper funding.

Figure 109 Constrained Plan - Update Project Funding

The screenshot shows the Capital Planning Tool interface. On the left, there's a timeline with two entries: 'Submitted Unconstrained Plan: ACCEPT' and 'Unconstrained Plan: SUBMIT'. Below the timeline is a 'Create Comment' button. The main area displays a table titled 'Bus: Revenue Rolling Stock: Purchase - Replacement project' with 29 rows. A large orange callout box labeled 'Update Project Funding' points to the table. At the top right of the table, there are status indicators: Cost \$2,222,222, Allocated: \$0, and Remaining: \$2,222,222. The table has columns for YEAR, ID, Subtype, Desc, Fuel, Age, Bcklg, Mileage, Condition, FY, Purchase, and Replcmnt.

This is where agencies add federal and local funding from funding sources that they've previously configured (see the funding section for more details about funding projects). Each fund can be chosen from the dropdown on the left and the proper allocation rules will apply as dictated by the fund details.

Figure 110 Adding Funding

The screenshot shows the 'Bus: Revenue Rolling Stock: Purchase - Replacement project' page. At the top, it says '100% Funded'. Below that, there are summary statistics: ALI: 11.12.04, Count: 29, Cost \$2,222,222, Allocated: \$2,222,222, and Remaining: \$0. The main area is titled 'Funding' and contains a 'Budget' section. The budget dropdown shows three options: '5310 UZA Apportionment - BPT (Federal)', 'State Placeholder (State)', and 'Local Placeholder (Local)'. An orange callout box labeled 'Add Federal, State, and Local Funds' points to the dropdown. To the right of the budget, there's a table for 'Allocation' with three rows: '\$1,777,777', '\$430,111', and '\$14,334'. A fourth row is partially visible. An orange callout box labeled 'Keep State Placeholder in Place' points to the 'State Placeholder (State)' option in the dropdown. At the bottom, there's a 'Funding Request' section with a 'Total' field containing '\$2,222,222'. An orange callout box labeled 'Fund Entire Project and Apply Fund Rules' points to the 'Total' field. Another orange callout box labeled 'Add Funding from Individual Funds' points to the 'Allocation' table.

After selecting funds from the left, users can manually add the funding dollars on the right, or update the entire budget on the bottom of the screen. In this step, **the project does not need to be fully funded, because the parent agency will add state funds as necessary**.

Once all of the funds have been added by the agency and are ready for the parent agency to apply state-level funding, the agency can submit the constrained plan.

Figure 111 Submit Constrained Plan



At this point, the parent agency will add state-level funding and submit the plan back to the child agency. They'll review the state-level funding, then submit the Final Draft. It then gets Final Approval from the parent agency, then ultimately the scenario is approved.

Figure 112 Final Approval and Export



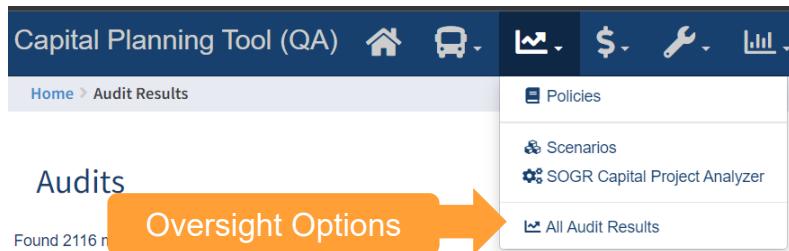
Finally, the scenario can be exported via the download icon at the top of the page to be used with dotGrants.

8.0 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” will bring you to an overview of the audit process.

Figure 113 Oversight Options



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

Figure 114 Audit Results

	TYPE	ASSET ID	DESCRIPTION	RESULT	UPDATED AT	NOTES
<input type="checkbox"/>	BCT 1	538	FRD 2006 Ford T...	Failed	06/01/2020	Condition has not been up...
<input type="checkbox"/>	BCT 1	154	FRD E450	Failed	06/01/2020	Condition has not been up...
<input type="checkbox"/>	BCT 1	159	FRD E450	Failed	06/01/2020	Condition has not been up...
<input type="checkbox"/>	BCT 1	160	FRD E450	Failed	06/01/2020	Condition has not been up...
<input type="checkbox"/>	BCT 1	161	FRD E450	Failed	06/01/2020	Condition has not been up...
<input type="checkbox"/>	BCT 1	162				up...
<input type="checkbox"/>	BCT 1	163				up...
<input type="checkbox"/>	BCT 1	G170				up...
<input type="checkbox"/>	BCT 1	179				up...
<input type="checkbox"/>	BCT 1	180				up...

9.0 Funding

Organizations can establish and manage pools of funds, through the creation and management of Programs, Templates, and Buckets. You can allocate these funds to projects (or, more accurately, to ALIs) to develop a long-term funding plan and see where additional funds might be needed.

When working with a parent organization that administers funds (like a State DOT or planning partner), you can collaborate to ensure that Federal, State, and Local funds are used in the best way possible to meet your needs.

There are many types of funds available, including formula and discretionary funds, funds that are only available to certain organizations or for certain purposes, and funds that are controlled or administered by one organization on behalf of another. Funds are generally identified by the name of the funding program and the year in which the funds were, or will be, granted. For each fund, the system tracks the dollar amount that is available, the dollar amount that has been committed to future projects, and the remaining balance.

If you work for an organization, some funds will be made available to you by a parent organization (depending on your system configuration). In addition, you can add local funds to pay for a specific project or group of assets you intend to purchase.

9.1 Programs

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

Figure 115 Programs

The screenshot shows the Capital Planning Tool (CPT) interface. At the top, there's a navigation bar with links for Home, Funding Programs, and a search bar. Below the navigation is a sidebar with links for Programs, Budgets, Grants, Bond Requests, Status, and Import/Export. A large orange arrow points from this sidebar to the word "Programs". The main area contains a table titled "Available Funding Programs". The table has columns for PROGRAM NAME, FULL NAME, SOURCE, INFLATIO..., LIFE OF \$..., % MATCH, VALID FROM, VALID TO, CREATED BY, PROGRAM..., and ACTIONS. Three rows are visible in the table, each representing a different funding program: "1514 Bond 1", "1514 Discretionary 1", and "1516 1". Another orange arrow points to the first row in the table.

PROGRAM NAME	FULL NAME	SOURCE	INFLATIO...	LIFE OF \$...	% MATCH	VALID FROM	VALID TO	CREATED BY	PROGRAM...	ACTIONS
1514 Bond 1			0.00%	96.77%				BPT	Active	
1514 Discretionary 1			0.00%	96.77%				BPT	Active	
1516 1			100.00%					BPT	Active	

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

Figure 116 Funding Program Details

The screenshot shows the Capital Planning Tool (CPT) interface. At the top, there's a navigation bar with icons for Home, Funding Programs, and a search function. Below the navigation bar, the page title is '1514 Bond'. The main content area has tabs for 'Details', 'Templates' (which is currently selected), 'Grants', 'Assets', 'Documents', and 'Comments'. Under the 'Program Eligibility' section, it lists BPT, ACTS, Amtrak, ATA, and BCT. To the right of the main content area, there's a large orange callout bubble containing the text 'Additional Program Information'.

9.2 Templates

Templates are the governing rules applied to Programs, and are used to create a structure for funding Budgets. Multiple Templates may be created for a single Program. A Template defines which organizations can use a Program, and how they may create Buckets. In addition, the following rules can be managed:

- Contributor: Designation of organization who provides funds for the Bucket.
- Owner: Designation of organization who can allocate funds to ALIs from the Bucket.
- Bucket Parameters: Designation of single year or multiyears of funding for a Bucket, designation of one or more organizations to use the Bucket for a single year, or to allow the creation of multiple Buckets for a single organization for a single year.
- Percent Match: Designation of the percent of funding that can be allocated to a single ALI from the Bucket that will be created (defaults to values set in the associated Program).
- Project Type Use: Designation of types of projects that funding can be allocated to from the Buckets that are created using the template.

Figure 117 Available Templates associated with a Program

The screenshot shows the Capital Planning Tool (CPT) interface. At the top, there's a navigation bar with icons for Home, Funding Programs, and a search function. Below the navigation bar, the page title is "1514 Bond". Underneath the title, there's a "Details" tab and a "Templates" tab, which is currently selected. The "Templates" tab has a sub-menu with options: Details, Templates (5), Grants (0), Assets (59), Documents (0), and Comments (0). To the right of the sub-menu is a "Search Table..." input field and some export icons. A large table below the sub-menu lists five templates. The columns include Template Name, Program, Contributor, Funding Horizon, Created By, % Match, and Action. The templates listed are:

Template Name	Program	Contributor	Funding Horizon	Created By	% Match	Action
1514 Bond Funds - Pooled Funds	1514 Bond	Grantor	Annual		96.775%	<i>[Edit]</i> <i>[Checkmark]</i> <i>[Delete]</i>
1514 Bond Funds - SEPTA/PAA...	1514 Bond	Grantor	Recurring		96.775%	<i>[Edit]</i> <i>[Checkmark]</i> <i>[Delete]</i>
1514 Bond Funds - Single Agency	1514 Bond	Grantor	Annual		96.775%	<i>[Edit]</i> <i>[Checkmark]</i> <i>[Delete]</i>

Clicking an individual Template will provide more details about the template. It also can show organization eligibility.

Figure 118 Template Details

The screenshot shows the Capital Planning Tool (CPT) interface for the "1514 Bond Funds - Pooled Funds" template. On the left, there's a sidebar with the template name and a "Actions" button. The main area has tabs for "Details" and "Eligibility". An orange callout bubble points to the "Eligibility" tab with the text "Additional Template Information". Below the tabs, there's a section titled "Organizations" with a table. Another orange callout bubble points to this table with the text "Template Details". The table has columns for Address 1, City, Zip, Phone, Ext., Website, and Status. One row is visible, showing information for PennDOT Bui... (Grantor, Keystone Bui..., Harrisburg, 17120, 717-214-40..., www.dot.sta..., Active).

9.3 Budgets

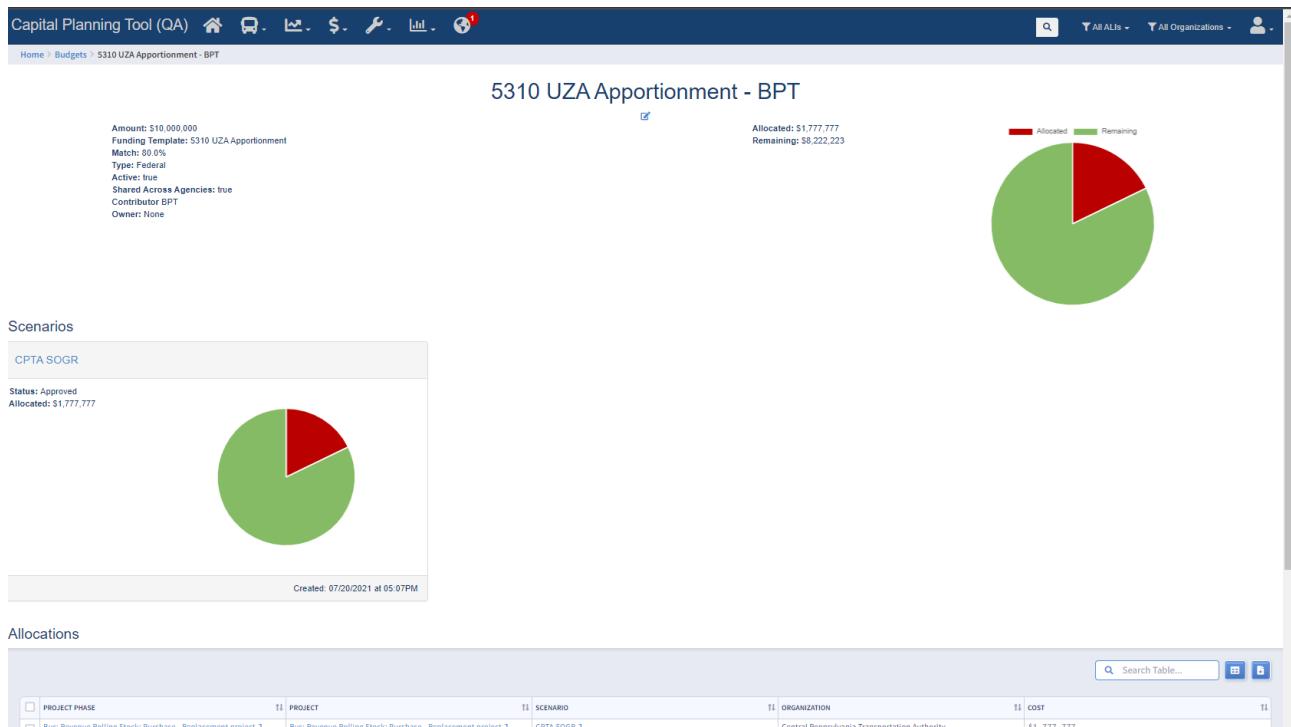
Budgets are the most granular elements in the funding process—this is where you'll actually allocate funds to your capital projects via their ALIs. Budgets should be thought of as program-based annual budgets, which have funds available across one or multiple years, and that can be allocated to ALIs according to rules developed within the Templates. The Budget table displays the name of the associated Program, the name of the Budget, ownership/control information, and funding balances of Total funds available, Committed (allocated) value, and the Available (unallocated) balance.

Figure 119 Budget Overview

Capital Planning Tool (QA) Home Funding Programs > Templates > Buckets										
<input checked="" type="checkbox"/> Create Buckets		<input type="checkbox"/> All Organizations		<input type="checkbox"/> All Templates		<input type="checkbox"/> All Years		<input type="checkbox"/> All Funds		
FY	Program (Template)	Name		Type	Owner	Restricted To	Total	Committed	Available	Expires
FY 18-19	5339 (5339 Urban)	5339 Urban-LCTA-FY18/19		Federal	LCTA		\$436,257	\$452,257	\$-16,000	FY 20-21
FY 18-19	CMAQ (CMAQ)	CMAQ-BTA-FY18/19		Federal	BTA		\$2,300,000	\$0	\$2,300,000	i e u
FY 18-19	CMAQ (CMAQ)	CMAQ-BTA-FY18/19		Federal	BTA		\$3,000,000	\$0	\$3,000,000	i e u
FY 18-19	5339 (5339 Urban)	5339 Urban-SCTA-FY18/19		Federal	SCTA		\$1,300,000	\$0	\$1,300,000	FY 20-21
FY 18-19	CMAQ (CMAQ)	CMAQ-SCTA-FY18/19		Federal	SCTA		\$1,200,000	\$0	\$1,200,000	i e u
FY 18-19	CMAQ (CMAQ)	CMAQ-LANTA-FY18/19		Federal	LANTA		\$850,000	\$850,000	\$0	i e
FY 18-19	Local (Local)	Local-SCTA-FY18/19-		Local	SCTA		\$100,000	\$4,095	\$95,905	i e
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-SCTA-FY18/19		Federal	SCTA		\$7,000,000	\$480,000	\$6,520,000	FY 22-23
FY 18-19	Local (Local)	Local-BARTA-FY18/19-		Local	BARTA		\$100,000	\$45,612	\$54,388	i e
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-BARTA-FY18/19		Federal	BARTA		\$3,300,000	\$2,772,910	\$527,090	FY 22-23
FY 18-19	5307 (5307 Large Urban)	5307 Large Urban-RRTA-FY18/19		Federal	RRTA		\$2,800,000	\$2,510,407	\$289,593	FY 22-23
FY 18-19	Local (Local)	Local-RRTA-FY18/19-		Local	RRTA		\$100,000	\$26,684	\$73,316	i e
FY 18-19	CMAQ (CMAQ)	CMAQ-BARTA-FY18/19		Federal	BARTA		\$1,200,000	\$1,200,000	\$0	i e
FY 18-19	5339 (5339 Urban)	5339 Urban-BARTA-FY18/19		Federal	BARTA		\$370,000	\$360,205	\$9,795	FY 20-21
FY 18-19	5339 (5339 Urban)	5339 Urban-RRTA-FY18/19		Federal	RRTA		\$930,000	\$911,196	\$18,804	FY 20-21
EV	Local (Local)	Local-CPT-EFT-FY18/19		Local	CPT-EFT		\$0	\$0	\$0	i e u

Clicking on an individual Budget will bring you details about that Budget, such as a description, and which ALIs have funding allocated from the associated Budget.

Figure 120 Budget Details



Detailed views of budgets show how much of that budget has been allocated and to which project and scenario it has been allocated.

9.4 Bond Requests

A Bond Request is a request by an organization (transit agency or parent agency) for a bond authorization in a future piece of legislation. To begin using bond requests, navigate to the Bond Request interface.

Figure 121 Bond Requests

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, Cost, and Book Value. The table lists various asset types like ACTS Revenue Vehicles, AMTRAN Support Facilities, etc. On the right, there's a navigation menu with options like Programs, Templates, Buckets, My Funds, Fund Projects, Bond Requests, Status, and Import/Export. An orange arrow points from the text 'Bond Requests' to the 'Bond Requests' option in the menu.

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	2.6	30	\$1,575,635	\$1,024,97
ACTS Support Facilities	2.0	1	\$403,440	\$387,75
AMTRAN Revenue Vehicles	11.4	30	\$5,470,730	\$2,165,63
AMTRAN Stations/Stops /Terminals	10.6	5	\$58,487	\$20,46
AMTRAN Support Facilities	29.4	5	\$2,274,755	\$1,108,90
AMTRAN Support Vehicles	4.6	7	\$205,513	\$82,53
AMTRAN Maintenance Equipment	12.9	211	\$3,036,981	\$478,39
AMTRAN Facility Equipment	30.6	90	\$2,907,326	\$1,109,83
AMTRAN IT Equipment	6.4	84	\$54,756	\$20,144
AMTRAN Office Equipment	14.2	204	\$111,710	\$16,904

The bond request screen shows details about a bond request.

Figure 122 Bond Request Interface

The screenshot shows the 'Bond Requests' interface. At the top, there's a search bar and filter options for 'Any Status...' and 'Any Submission Date...'. Below that is a table with columns for Title, Organization, Description, Justification, Status, Amount, and Created. The table contains four rows of test data. There are also buttons for '+ Add Bond Request' and 'Search Table...'.

Title	Organization	Description	Justification	Status	Amount	Created
Test Bond 2	ACTS	Test Bond 2	Test Bond 2	Rejected	\$200	05/25/2021 06:17 PM
Test Bond 2	ACTS	Test	Test	Rejected	\$60,000	12/04/2021 04:54 PM
Test Bond 1	ACTS	Test Bond	Test Bond	Rejected	\$5,000	01/11/2022 04:33 PM
Test Bond 1	ACTS	Test Bond	Test Bond	Rejected	\$5,000	01/11/2022 04:39 PM

Transit Managers, DOT managers, and Administrators can create new bond requests.

Figure 123 New Bond Request

New Bond Request

* Organization

* Title

* Description

* Justification

* Amount

Federal Funds

Federal Pcnt

Federal Amount

State Pcnt

State Amount

Local Pcnt

Local Amount

Create Bond request

Once a bond request is submitted, it has four status updates. Pending (sent to DOT for review), rejected (DOT has reviewed and rejected), submitted (submitted to the program office for legislator review), then authorized or not authorized (by legislative review).

If a bond request is authorized, DOT managers can assign the authorized request to a Bucket.

9.5 Asset Update Status

The Status interface serves as a way to track how agencies have updated their assets.

Figure 124 Review

Capital Planning Tool (QA)

Home

Asset Summary All

Type	Avg. Age	Count	Cost	Book Value
ACTS Revenue Vehicles	2.6	30	\$1,575,635	\$1,024,971
ACTS Support Facilities	2.0	1	\$403,440	\$387,755
AMTRAN Revenue Vehicles	11.4	30	\$5,470,730	\$2,165,631
AMTRAN Stations/Stops	10.6	5	\$58,487	\$20,461
/Terminals				
AMTRAN Support Facilities	29.4	5	\$2,274,755	\$1,109,900
AMTRAN Support Vehicles	4.6	7	\$205,513	\$82,533
AMTRAN Maintenance Equipment	12.9	211	\$3,036,981	\$478,399
AMTRAN Facility Equipment	30.6	90	\$2,907,326	\$1,109,831
AMTRAN IT Equipment	6.4	84	\$54,755	\$20,144
AMTRAN Office Equipment	14.2	204	\$111,710	\$16,904
AMTRAN Communications Equipment	7.0	61	\$1,790,766	\$775,479

Programs

Templates

Buckets

My Funds

Fund Projects

Bond Requests

Status

Import/Export

Review

Num. Projects

Cost

CARBON

CARS

CAT

CATA*

All

FY 18-19

My Notices

No notices.

My Messages

New 111 Flagged 1 Read 0 Sent 1

Elizabeth Bonini TAM Group Generated Sent 09:37 AM 07/11/2018 Unopened

Elizabeth Bonini TAM Group Generated Sent 03:17 PM 07/02/2018 Unopened

Figure 125 Review Asset Update Status

Org	Assets Updated
ACTS	100%
Amtrak	0%
AMTRAN	100%
ATA	100%
BARTA	100%
BCT	0%
BCTA	99%
BMC	66%
BPT	0%
BSS	100%

Showing 1 to 10 of 65 entries

Previous 1 2 3 4 5 6 7 Next

9.6 Import/Export

Users can import or export project and funding data in a JSON file. These JSON file exports are specifically used to transfer data back and forth between external systems.

Figure 126 Import/Export

Date	Type	File Name	Status
07/11/2018	Elizabeth Bonini	TAM Group Generated	Sent: 09:37 AM 07/11/2018 Unopened
07/02/2018	Elizabeth Bonini	TAM Group Generated	Sent: 03:17 PM 07/02/2018 Unopened
07/02/2018	Elizabeth Bonini	TAM Group Generated	Sent: 10:58 AM 07/02/2018

The import/export page shows recent imports and exports. You can click on a recent item to see details about a specific export.

Figure 127 Recent Imports and Exports

The screenshot shows a table titled "Recent Imports and Exports" with columns: Type, Creator, and Created At. The data includes:

Type	Creator	Created At
Import	Kyle Eckert	11/20/2017
Import	Kyle Eckert	11/20/2017
Import	Kyle Eckert	02/05/2018
Import	Kyle Eckert	04/12/2018
Import	Elizabeth Bonini	06/29/2018
Import	Elizabeth Bonini	07/12/2018

A callout bubble on the right says: "Exporting first will give you the required formatting".

Click “New Export” to download the data either ALI- or Project-level data within a fiscal year range. Include whether or not to include funding or asset data in the export.

Figure 128 New Export

The screenshot shows the "New Export" page with the following settings:

- Level:** ALI level (radio button selected)
- From:** FY 18-19
- To:** FY 18-19
- Include Funding:** Checked
- Include Assets:** Checked

A "Save" button is at the bottom.

Clicking save will bring you to the details page for the export.

Figure 129 Export Details

The screenshot shows the "Export Details" page for an export created on 07/20/2018. The export type is "Export" and the creator is "Elizabeth Bonini". The export was created at 11:27 AM on 07/20/2018. The level is "Activity Line Item". The description is "FY 18-19 for BPT, ACTS, AMTRAN ,ATA, BARTA, BCT, BCTA, BMC, B SS, BTA, BUTLER, CARBON, CAR S, CAT, CATA, CCTA, CHESSR, C LARCO, CNTRCO, COLEBT, COLT S, CRATA, CTDO, CUMBCO, DUFAS T, EMTR, ENDMTN, FACT, FORE ST, FRNKO, GREENE, HBFCO, H PT, ICTA, LANTA, LCTA, MRCOG ,MCTA, MIDCO, MMVTA, MONTC O, MTR, NCATA, PAAC, PART, PE RRY, PIKECO, RRTA, SCTA, SEPT A, SOMERS, STEP, STN, STS, SU SQCO, TAWC, USTA, VCTO, WAS H, WASHCO, WAYNCO, WBT, WCT A, YCTA including funding and assets".

A callout bubble points to the "Download" button with the text: "Click Download to save the export".

You can then open and edit the JSON file in your excel. When you're ready, click Import and upload the file back into the system.

Figure 130 Import

The screenshot shows the 'New Project/Funding Import' page of the Capital Planning Tool. At the top, there's a header bar with icons for home, download, chart, dollar sign, and globe. Below it, a breadcrumb navigation shows 'Home > Project and Funding Import/Export > New Import'. The main area has a title 'New Project/Funding Import'. There is a required field labeled 'JSON File' with a 'Browse...' button and a message 'No file selected.' Below it is a 'Save' button.

After the import is complete, you'll see details about the uploaded import. If you need that file at a later time, you can return and redownload the file from the import screen.

Figure 131 Import Details

The screenshot shows the 'Import Details' page of the Capital Planning Tool. The left sidebar shows a summary: '\$ Project/Funding Import 07/12/2018' with a 'Download' button. The main area has a title 'Details' and a sub-section 'Buckets 259 Errors 0'. A note says 'Note that amounts may not match import/export if subsequent changes have been made in CPT.' Below is a table with columns: FY, Program (Template), Name, Type, Owner, Restricted To, Total, Committed, Available, and Expires. The table contains three rows of data:

FY	Program (Template)	Name	Type	Owner	Restricted To	Total	Committed	Available	Expires
FY 08-09	1514 Bond (1514 Bond Funds - SEPTA/PAAC Owned)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY08/09-Act 41 of 2008 - 321, 80, (7.4) (vii)	State	PAAC		\$7,200,000	\$0	\$7,200,000	
FY 06-07	1514 Bond (1514 Bond Funds - SEPTA/PAAC Owned)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY06/07-Act 83 of 2006 - 738, 116, (18) (xi)	State	PAAC		\$4,544,969	\$0	\$4,544,969	
FY 06-07	1514 Bond (1514 Bond Funds - SEPTA/PAAC ..)	1514 Bond Funds - SEPTA/PAAC Owned-PAAC-FY06/07-Act 83 of 2006 - 739, 116, (18) (xii)	State	PAAC		\$5,850,000	\$0	\$5,850,000	

10.0 Reports

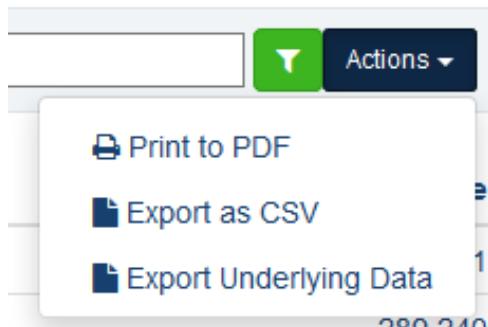
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 132 Reports Dropdown

The screenshot shows the CPT interface with a dark blue header bar. In the top right corner, there is a dropdown menu labeled "Reports" with several options: "Reports", "Capital Needs Reports", "System Reports", "Planning Reports", and "NTD Reporting". An orange arrow points from the text "Reports Dropdown" to this menu. Below the header is a navigation bar with icons for Home, Asset Summary, and various reports. The main content area displays an "Asset Summary" table with columns for Type, Avg. Age, Count, Cost, and Book Value. The table includes rows for ACTS Revenue Vehicles, ACTS Support Facilities, and AMTRAN Revenue Vehicles. To the right of the table is a summary section for "Num. Projects" and "Cost".

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 133 Report Exports

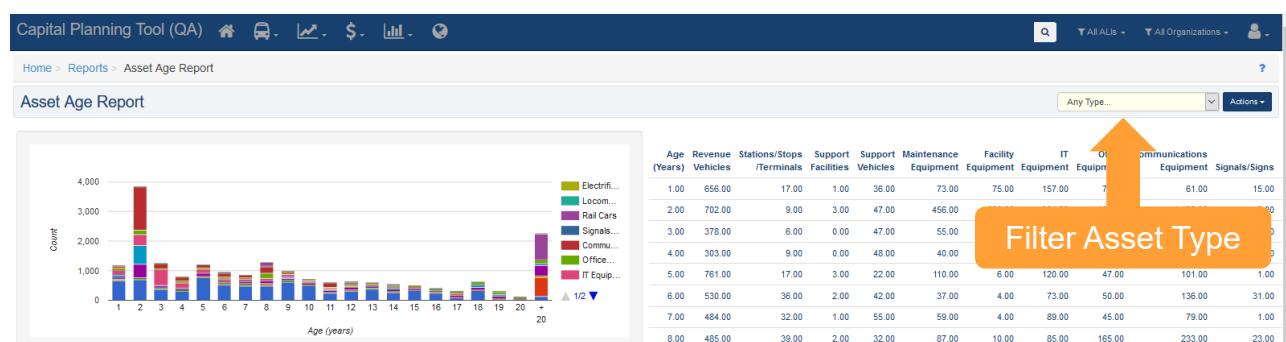


10.1 Inventory Reports

Inventory reports are a rollup of inventory data and include the Asset Age Report and the Asset Funding Report.

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

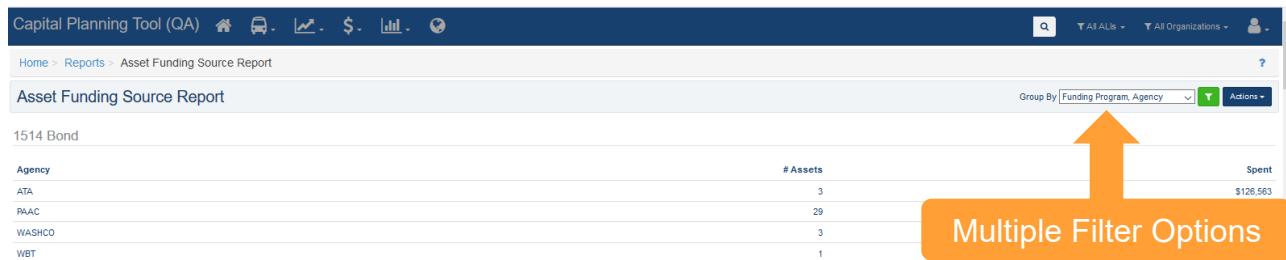
Figure 134 Asset Age Report



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

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

Figure 135 Asset Funding Source Report



10.2 Capital Needs Reports

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

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

Figure 136 Unconstrained Capital Projects Report

Capital Planning Tool (QA) Home Reports Unconstrained Capital Projects Report

Unconstrained Capital Projects Report

Any FY... Any Any Any Actions ▾

All Transit Operators

Org	Count	Cost
ACTS	14	\$3,384,907
AMTRAN	47	\$13,274,188
ATA	34	\$44,042,171

The Need versus Funding Statewide Report shows the total project-based needs by fiscal year versus available funding, broken out by funding program.

Figure 137 Need versus Funding Statewide Report

Capital Planning Tool (QA) Home Reports Needs Versus Funding Statewide Report

Needs Versus Funding Statewide Report

Actions ▾

Fiscal Year	Total Needs	Total Federal Funds	Total State Funds	Total Local Funds	Balance/(Shortfall)
FY 18-19	\$946,477,219	\$61,129,001	\$1,373,127,978	\$2,202,000	\$489,981,760
FY 19-20	\$335,781,113	\$10,284,000	\$0	\$0	-\$325,497,113
FY 20-21	\$118,919,941	\$9,343,000	\$0	\$24,975	-\$109,551,966
FY 21-22	\$73,150,311	\$8,383,000	\$0	\$0	-\$64,767,311
FY 22-23	\$124,717,118	\$0	\$0	\$0	-\$124,717,118
FY 23-24	\$176,789,092	\$0	\$0	\$0	-\$176,789,092
FY 24-25	\$186,307,185	\$0	\$0	\$0	-\$186,307,185
FY 25-26	\$101,012,897	\$0	\$0	\$0	-\$101,012,897
FY 26-27	\$257,203,755	\$0	\$0	\$0	-\$257,203,755
FY 27-28	\$174,267,299	\$0	\$0	\$0	-\$174,267,299
FY 28-29	\$396,952,612	\$0	\$0	\$0	-\$396,952,612
FY 29-30	\$190,215,433	\$0	\$0	\$0	-\$190,215,433

The ALI Funding Report displays a summary of funded ALIs. The user selects the level that they would like to group columns by (By Year, By Organization (agency), By Scope, and Split SOGR), and the system reports on the number of ALIs, number of Assets, ALI Cost, Allocated Funding (Funded), and the Balance for the selected level of grouping.

Figure 138 ALI Funding Report

Capital Planning Tool (QA) Home Reports ALI Funding Report

ALI Funding Report

By Year By Agency By Scope Split Sogr Pinned? All Actions ▾

Year	Agency	# ALIs	# Assets	Cost	Funded	Balance
FY 18-19	ACTS	2	2	\$145,536	\$0	\$145,536
FY 18-19	AMTRAN	7	36	\$1,108,200	\$0	\$1,008,021
FY 18-19	ATA	14	16	\$2,202,000	\$0	\$2,071,957
FY 18-19	BARTA	5	26	\$6,387,200	-\$4,376,727	\$2,008,553
FY 18-19	BCT	7	43	\$1,843,909	\$0	\$1,843,909
FY 18-19	BCTA	4	7	\$236,000	\$0	\$236,000
FY 18-19	BSS	2	6	\$530,578	\$0	\$530,578
FY 18-19	BTA	4	4	\$4,663,357	\$19,800	\$4,643,557

The Capital Plan Report shows funded projects, and ALIs for a filtered range of years, providing a breakdown by Federal, State, and Local funding sources. The report groups data by organization, fiscal year and displays one project per row and one project attribute per column.

Figure 139 Capital Plan Report

Capital Planning Tool (QA) Home Reports Capital Plan Report ?

Capital Plan Report

From FY 18-19 To FY 18-19 Actions

Allied Coordinated Transportation Services, Inc

FY	Project	Title	Scope	# ALIs
FY 18-19	ACTS 18-19 #3990	Bus: Revenue Rolling Stock: Purchase - Replacement project	111	1
FY 18-19	ACTS 18-19 #5639	Mobile Vehicle Lifts	114	1
Totals for FY 18-19			2	\$145,536 \$0 \$0 \$0

Filter Year Range

The Bond Request Report finds and displays all "Pending" and "Submitted" bond requests whose statuses were last updated between a user-defined start and end date.

Figure 140 Bond Request Report

Capital Planning Tool (QA) Home Reports Bond Request Report ?

Bond Request Report

From To Actions

Agency	Title	Description	Justification	Total Costs	Federal Funding	Federal Share	Federal Source	State Amount Requested	Status	Local Funding	Local Share
Altoona Metro Transit	Test Bond	This is a test bond.	We need to buy a bus.	\$40,000	\$165,332	80%	5307 Large Urban	\$40,000	19%	\$1,333	1%

Filter Year

10.3 System Reports

System reports keep track of system-related functional metrics.

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

Figure 141 User Login Report

Capital Planning Tool (QA) Home Reports User Login Report ?

User Login Report

Actions

Org	First Name	Last Name	Num Logins	Last Login	Acct Locked On
BPT	Aaron	Wolff	276	01:36 PM 06/25/2018	
BPT	Andrew	Batson	72	02:03 PM 05/04/2018	
BPT	Anthony	Stever	163	10:01 AM 05/29/2018	
BPT	April	Fosmore	9	07:49 AM 10/19/2016	
BPT	BPT	User	4	02:11 PM 03/04/2016	
BPT	Colton	Brown	208	02:59 PM 06/20/2018	
BPT	Elizabeth	Bonini	311	03:28 PM 07/17/2018	
BPT	Eric	Ziering	20	11:38 AM 06/01/2015	
BPT	Ernie	Shank	183	03:53 PM 06/20/2018	
RPT	Ian	Detamore	13	09:49 AM 06/15/2018	

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

Figure 142 Issues Report

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

10.4 Planning Reports

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

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

Figure 143 Vehicle Replacement Report

Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 18-19	Revenue Vehicles	Bus < 30 FT	472	\$3,881,401	\$34,064,976
FY 18-19	Revenue Vehicles	Bus 30 FT	18	\$972,478	\$4,088,775
FY 18-19	Revenue Vehicles	Van	189	\$332,474	\$7,668,659
FY 18-19	Revenue Vehicles	Sedan/Station Wagon	75	\$72,267	\$1,222,056
FY 18-19	Revenue Vehicles	Bus Std 35 FT	34	\$973,510	\$7,994,757
FY 18-19	Revenue Vehicles	Bus Std 40 FT	394	\$2,909,526	\$42,884,133
Totals for FY 18-19			1,182	\$9,141,656	\$97,923,356

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

Figure 144 State of Good Repair Report

The screenshot shows the CPT interface with the title "State of Good Repair Report". The table below lists asset types and their details:

Type	Sub Type	Count	Book Value	Replacement Cost
Revenue Vehicles	Bus Std 35 FT	27	\$2,212,738	\$5,739,747
Revenue Vehicles	Bus 30 FT	9	\$346,100	\$2,778,851
Stations/Stops/Terminals	Intermodal Terminal	74	\$19,143,700	\$27,574,857
Stations/Stops/Terminals	Parking Lot	2	\$11,687	\$68,854
Support Facilities	Bus Maintenance Facility	3	\$0	\$1,263,373
Support Facilities	Other Support Facility	2	\$1,108,902	\$2,000,520
Support Vehicles	Van	1	\$6,721	\$23,167
Support Vehicles	Sedan/Station Wagon	8	\$80,472	\$233,815
Support Vehicles	Pickup Truck	2	\$12,552	\$99,178

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

Figure 145 Disposition Report

The screenshot shows the CPT interface with the title "Disposition Report". The table below lists asset types and their details for the FY 17-18 period:

Fiscal Year	Type	Sub Type	Count	Book Value	Replacement Cost
FY 17-18	Revenue Vehicles	Bus Std 35 FT	18	\$466,409	\$2,943,866
FY 17-18	Revenue Vehicles	Bus 30 FT	7	\$302,308	\$2,166,361
FY 17-18	Maintenance Equipment	Bus Maintenance Equipment	73	\$217,175	\$2,454,801
FY 17-18	Revenue Vehicles	Bus < 30 FT	20	\$57,253	\$1,335,937
FY 17-18	Revenue Vehicles	Bus Commuter/Suburban	8	\$738,880	\$4,493,528
FY 17-18	IT Equipment	Hardware	1	\$0	\$4,591
FY 17-18	Office Equipment	Other Office Equipment	1	\$0	\$5,399
FY 17-18	Revenue Vehicles	Van	4	\$0	\$67,021
Totals for FY 17-18			132	\$1,782,025	\$13,471,504

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

Figure 146 Asset Service Life Summary Report

The screenshot shows the CPT interface with the title "Asset Service Life Summary Report". The table below lists asset types and their details for Revenue Vehicles:

Organization	Subtype	Quantity	# Past ESL (Mo.)	Pcnt	# Past ESL (Mi.)	Pcnt	# Past TERM Thresh	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%		

Filter or Export

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

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

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

Figure 147 TAM Service Life Summary Report

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

TAM Service Life Summary Report

Organization	Asset Classification Code	Quantity	# At or Past ULB/TERM	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

Asset Category: Revenue Vehicles | Years Past ULB Min: 0 | Years Past ULB Max: 100 | Actions

Filter or Export

11.0 Specialized Reports

11.1 Asset Fleet Builder

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

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

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

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

Figure 148 Asset Fleet Builder

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

Fleets

Revenue Vehicles Support Vehicles Manage Fleets

Orphaned Assets

Any Asset Type	Tag/ID/VIN/Plate	Any Mfr...	Any Model	Year Mfd	Any Subtype...	Any Vehicle Type	Any Status	Y	X			
Agency	Asset Type	Asset Tag	External ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action

Asset Fleet Builder

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

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

Build Revenue or Support Fleets

Build Revenue Vehicles Fleets
Build Support Vehicles Fleets

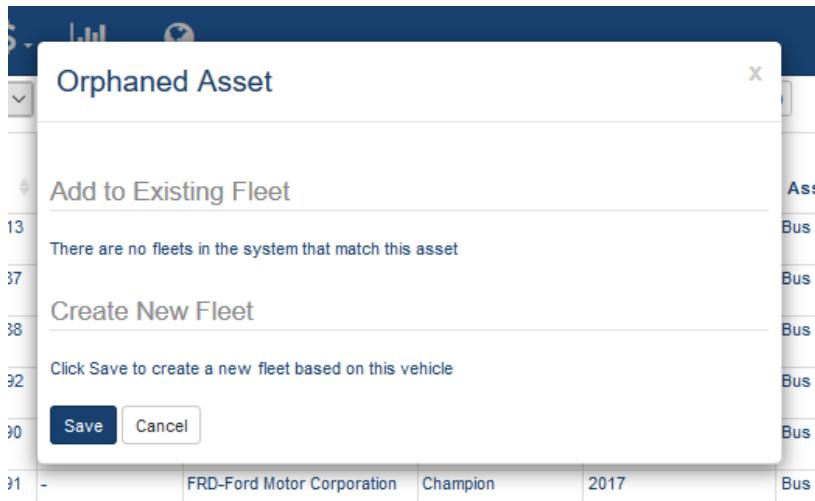
When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 149 Asset Fleet Builder—Orphaned Assets

The screenshot shows the 'Fleets' section of the Capital Planning Tool. At the top, there are tabs for 'Revenue Vehicles', 'Support Vehicles', and 'Manage Fleets'. The 'Manage Fleets' tab is selected. Below it, the 'Orphaned Assets' section is displayed with a table of vehicle data. On the right side of the table, there is a column of buttons 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 dialog.

Agency	Asset Type	Tag	ID	VIN	License Plate	Manufacturer	Model	Year Manufactured	Asset Subtype	FTA Vehicle Type	Status	Action
CAT	Revenue Vehicles	#1701		15GGGB2713H3189913	-	GIL-Gillig Corporation	35' Low Floor	2017	Bus Std 35 FT	BU-Bus	In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#271	PT Bus #271	1FDDE4FS8HDC18987	-	FRD-Ford Motor Corporation	Champion				In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#272	PT Bus #272	1FDDE4FS8HDC18988	-	FRD-Ford Motor Corporation	Champion	2017			In Service	<button>Add to Fleet</button>
CAT	Revenue Vehicles	#273	PT Bus #273	1FDDE4FSXHDC18992	-	FRD-Ford Motor Corporation	Champion				In Service	<button>Add to Fleet</button>

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 150 Adding an Orphaned Asset to a Fleet

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

Figure 151 Adding a New Fleet

The screenshot shows the CPT interface for adding a new fleet. The top navigation bar includes icons for Home, Fleets, Revenue Vehicles, and a search bar. The main content area displays a success message: "Asset fleet was successfully created." Below this, the "Fleets" section shows a single entry for "CAT : MB DO : GIL : 2017". The entry details include Organization: CAT, NTD ID, and Agency Fleet ID. On the right, there are "Actions" buttons for "Update this fleet" and "Remove this fleet". At the bottom, tabs for "Details", "Basic Information", "Vehicle Information", "Mileage Information", and "Assets" (with a count of 1) are visible.

Figure 152 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 153** Update Odometer Readings

The screenshot shows the CPT interface for updating odometer readings. The top navigation bar and fleet details are identical to Figure 151. A large orange callout box labeled "Update Odometer Readings" is overlaid on the "Assets" tab. Two orange arrows point down to the "Record Mileage" buttons in the "Odometer Reading FY Start" and "Odometer Reading FY End" columns of the data table. The table has columns for Asset Tag, External ID, VIN, License Plate, Odometer Reading FY Start, Odometer Reading FY End, Miles During FY, Last Odometer Value, and Last Odometer Date. Two rows of data are shown: one for asset 086560 with VIN 15GGGB221011072394 and another for asset 086561 with VIN 15GGGB221311072406. Both rows have "Record Mileage" buttons in the start and end columns. The table footer indicates "Showing 1 to 2 of 2 rows".

Asset Tag	External ID	VIN	License Plate	Odometer Reading FY Start	Odometer Reading FY End	Miles During FY	Last Odometer Value	Last Odometer Date
086560		15GGGB221011072394		Record Mileage	Record Mileage		345,025	11/30/2017
086561		15GGGB221311072406		Record Mileage	Record Mileage		35,386	11/30/2017

Figure 154 Remove or Add Assets from within a Fleet

The screenshot shows the CPT interface with the following details:

- Header:** Capital Planning Tool (QA) with navigation icons for Home, Fleets, Revenue Vehicles, and a search bar.
- Breadcrumbs:** Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001
- Section:** Fleets
- Table:** A grid showing vehicle assets for AMTRAN - MB DO - GIL - 2001. The columns include Asset Tag, External ID, VIN, License Plate, Title Number, Status, Emergency Contingency, ADA Accessibility, ULB, Mileage, Valid in Fleet, and Action. Two rows are listed:

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	➕
- Callout:** An orange arrow points to the 'Add or Remove Assets' button in the top right corner of the asset list table.

11.2 NTD Asset Reports

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

- Facilities (A-15)—Pulls asset data for primary facilities, for which an organization has capital responsibility.
- Infrastructure (A-20);—Pulls asset data for.
- Revenue Vehicles (A-30).
- Service Vehicles (Nonrevenue) (A-35).
- Performance Measure Targets (A-90).

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 155 Access NTD Reports

The screenshot shows the CPT interface with the following details:

- Header:** Capital Planning Tool (QA) with navigation icons for Home, Fleets, Revenue Vehicles, and a search bar.
- Breadcrumbs:** Home
- Section:** Home
- Table:** Asset Summary table showing data for Revenue Vehicles: Avg. Age (5.1), Count (24), Cost (\$640,800), and Book Value (\$307,565).
- Navigation:** A vertical menu on the left includes links for Inventory Reports, Capital Needs Reports, System Reports, Planning Reports, and NTD Reporting. An orange arrow points to the 'NTD Reporting' link.
- Callout:** An orange arrow points to the 'Access NTD Reports' button in the bottom right corner of the main content area.
- Right Panel:** My Notices and My Messages sections.

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 156 Table of Previously Generated NTD Reports

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

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

Figure 157 Create New Reporting Year Forms

New NTD Report

Organization: BUTLER-Butler County Community Public Transportation

Fiscal Year: 2016

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 158 NTD Report Details and Data

Submit, Create a New Version, or Remove

Access Forms or Add a Comment

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

Figure 159 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

12.0 Admin Tools

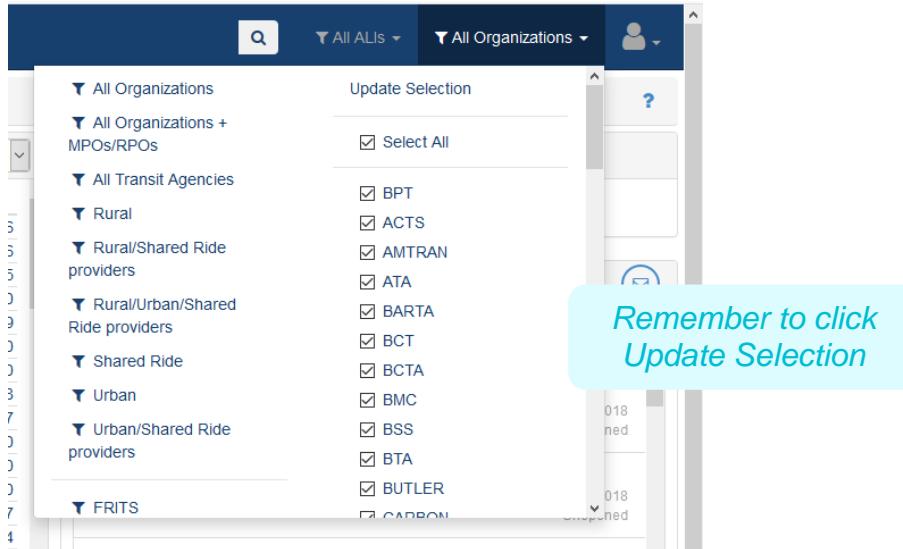
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

Figure 160 Admin User and Organization Options

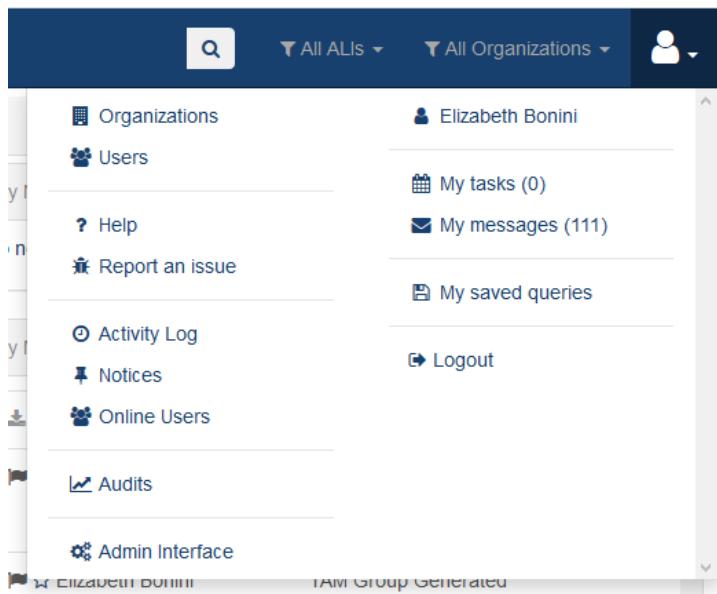


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

Figure 161 Organizations



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

Figure 162 Admin User Options

12.1 Organizations

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

Figure 163 Admin Organizations

The screenshot shows the Admin Organizations page. At the top, there is a navigation bar with icons for Home, Organizations, and other tools. Below the navigation bar is a breadcrumb trail: 'Home > Organizations'. On the left, there are buttons for '+ New Transit Operator' and '+ New Planning Partner'. A dropdown menu labeled 'Agency Type' is open. An orange callout box with the text 'Add new organizations' points to a large orange button at the bottom left of the table area. The table itself has columns for Type, Organization, Name, Full Address, Phone, Ext, Fax, and Web Site. Two rows of data are visible:

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

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

Figure 164 Add an Organization

12.2 Users

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

Figure 165 Admin Users

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

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

Figure 166 Add a User

New User

User Organizations

* Organization: Not Selected

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

Selected:

Choose All >

Roles & Privileges

* User Role: None

User Privileges:

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

User Details

* First Name: None

* Last Name: None

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

12.3 Notices

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

Figure 167 Notices

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

Showing 1 to 13 of 13 rows 200 rows per page

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

Figure 168 Add a Notice

New Notice

* Subject
[Text input field]

* Summary
[Text input field]

Details
[Text input field]

Organization
[Dropdown menu: All]

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

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

* Notice Type
[Dropdown menu: System Notice]

Create Notice

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

Figure 169 Notice on the Dashboard

My Notices

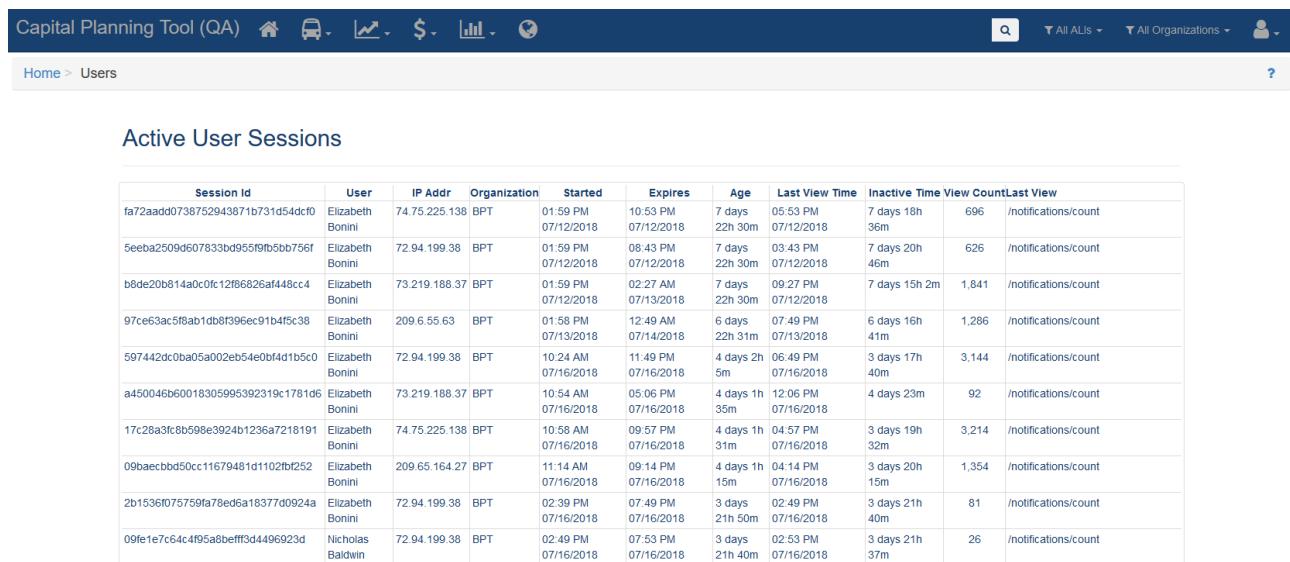
A test 12:00 AM 07/20/2018 Details...

My Messages

9 536 786 775 280 000

12.4 Online Users

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

Figure 170 Active Users


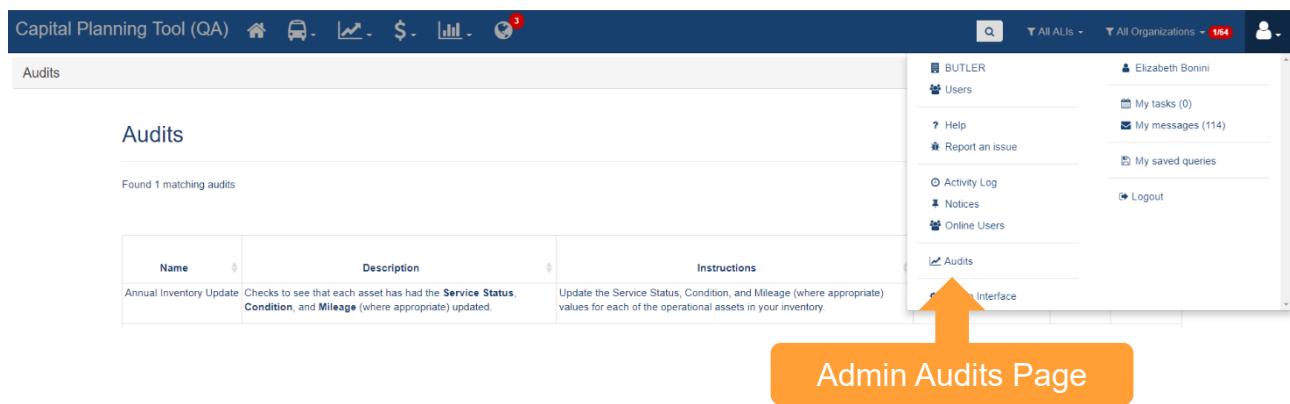
The screenshot shows a table titled "Active User Sessions" with the following columns: Session Id, User, IP Addr, Organization, Started, Expires, Age, Last View Time, Inactive Time, View Count, and Last View. The data in the table includes various session entries for users like Elizabeth Bonini and Nicholas Baldwin, with details such as IP addresses (e.g., 74.75.225.138), organizations (BPT), and last view times (e.g., 07/12/2018 at 01:59 PM).

Session Id	User	IP Addr	Organization	Started	Expires	Age	Last View Time	Inactive Time	View Count	Last View
fa72aadd0738752943871b731d54dcf0	Elizabeth Bonini	74.75.225.138 BPT	BPT	01:59 PM 07/12/2018	10:53 PM 07/12/2018	7 days 22h 30m	05:53 PM 07/12/2018	7 days 18h 36m	696	/notifications/count
5eeba2509d607833bd955f9fb5bb756f	Elizabeth Bonini	72.94.199.38 BPT	BPT	01:59 PM 07/12/2018	08:43 PM 07/12/2018	7 days 22h 30m	03:43 PM 07/12/2018	7 days 20h 46m	626	/notifications/count
b8de20b814a0c0f12f86826af448cc4	Elizabeth Bonini	73.219.188.37 BPT	BPT	01:59 PM 07/12/2018	02:27 AM 07/13/2018	7 days 22h 30m	09:27 PM 07/12/2018	7 days 15h 2m	1,841	/notifications/count
97ce63ac5f8ab1db8f396ec91b4f5c38	Elizabeth Bonini	209.6.55.63 BPT	BPT	01:58 PM 07/13/2018	12:49 AM 07/14/2018	6 days 22h 31m	07:49 PM 07/13/2018	6 days 16h 41m	1,286	/notifications/count
597442dc0ba05a002eb54e0bf4d1b5c0	Elizabeth Bonini	72.94.199.38 BPT	BPT	10:24 AM 07/16/2018	11:49 PM 07/16/2018	4 days 2h 5m	06:49 PM 07/16/2018	3 days 17h 40m	3,144	/notifications/count
a450046b60018305995392319c1781d6	Elizabeth Bonini	73.219.188.37 BPT	BPT	10:54 AM 07/16/2018	05:06 PM 07/16/2018	4 days 1h 35m	12:06 PM 07/16/2018	4 days 23m	92	/notifications/count
17c28a3fc8b598e3924b1236a7218191	Elizabeth Bonini	74.75.225.138 BPT	BPT	10:58 AM 07/16/2018	09:57 PM 07/16/2018	4 days 1h 31m	04:57 PM 07/16/2018	3 days 19h 32m	3,214	/notifications/count
09baecbb50cc11679481d1102fb252	Elizabeth Bonini	209.65.164.27 BPT	BPT	11:14 AM 07/16/2018	09:14 PM 07/16/2018	4 days 1h 15m	04:14 PM 07/16/2018	3 days 20h 15m	1,354	/notifications/count
2b1536f075759fa78ed6a18377d0924a	Elizabeth Bonini	72.94.199.38 BPT	BPT	02:39 PM 07/16/2018	07:49 PM 07/16/2018	3 days 21h 50m	02:49 PM 07/16/2018	3 days 21h 40m	81	/notifications/count
09fe1e7c64c4f95a8befff3d4496923d	Nicholas Baldwin	72.94.199.38 BPT	BPT	02:49 PM 07/16/2018	07:53 PM 07/16/2018	3 days 21h 40m	02:53 PM 07/16/2018	3 days 21h 37m	26	/notifications/count

12.5 Audits

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

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

Figure 171 Admin Audits Page


The screenshot shows the "Admin Audits Page" with a sidebar on the right containing links such as BUTLER, Users, Help, Report an issue, Activity Log, Notices, Online Users, and Logout. An orange arrow points from the text "Admin Audits Page" to the "Audits" link in the sidebar. The main content area displays a table with one audit entry: "Annual Inventory Update". The table columns are Name, Description, and Instructions.

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

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

Figure 172 Admin Audits Details Page

12.6 Admin Interface

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

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

Figure 173 Admin Interface

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