



# TransAM

*Administrative User*

# User Guide

*prepared for*

**Southern California Association of Governments (SCAG)**

*prepared by*

**Cambridge Systematics, Inc.**



*user guide*

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# 1.0 Welcome!

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

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

## 1.1 Initial Log In and Password Reset

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

**Figure 1 Password Reset Request Screen**

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

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

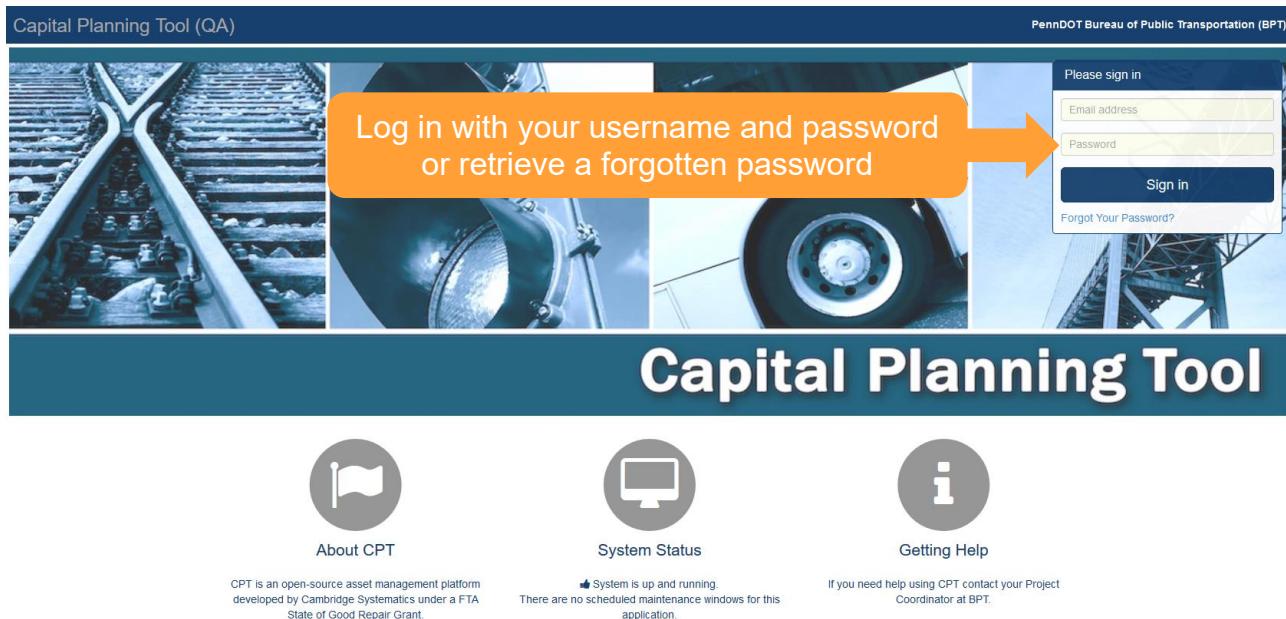
**Figure 2 Set/Reset Password Screen**

## 1.2 Ongoing Site Access

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

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

**Figure 3     Login Screen**



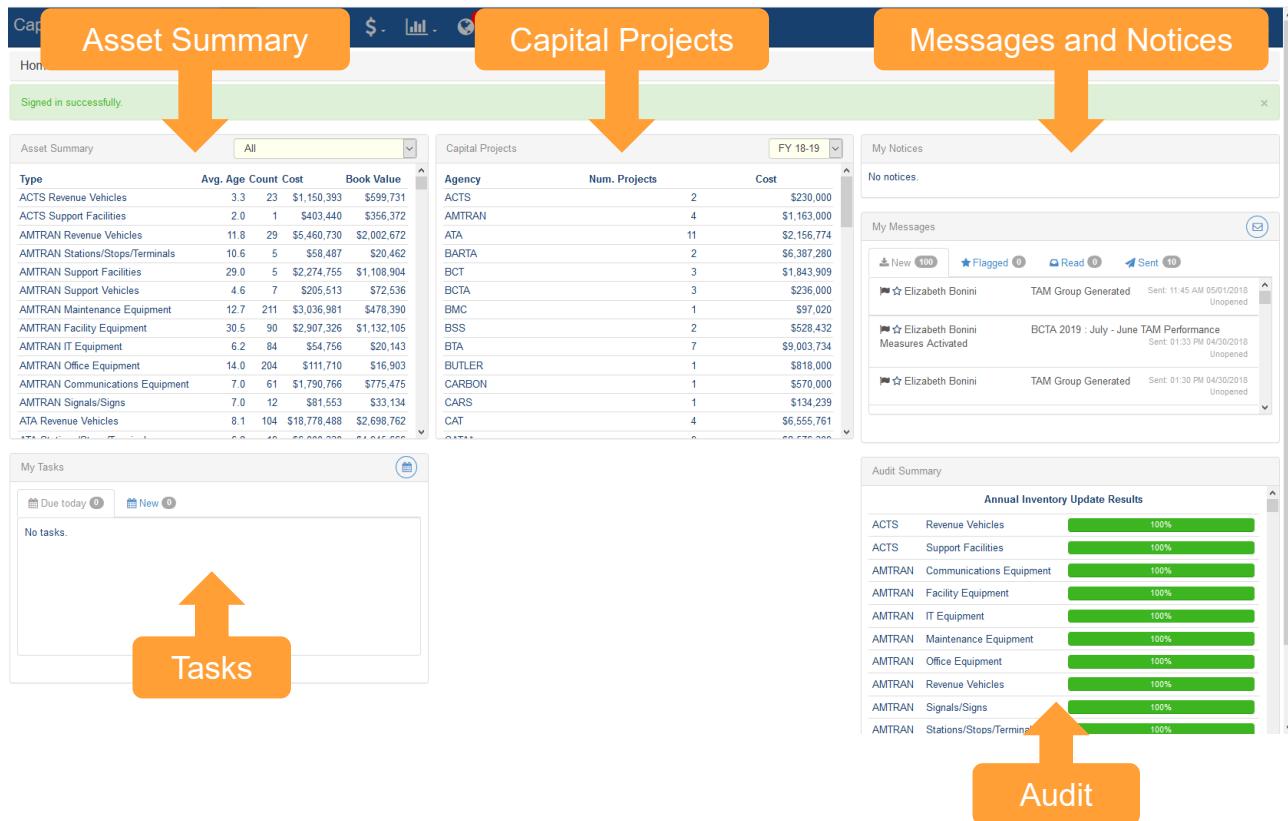
## 2.0 Dashboard

### 2.1 Dashboard Elements

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

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

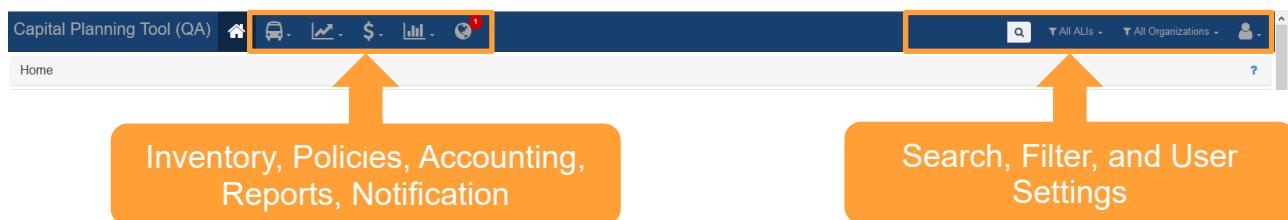
**Figure 4** Dashboard Elements



### 2.2 Header Menu and Controls

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

**Figure 5** Header Menu





## 3.0 General Features and Tools

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

### 3.1 Table Controls

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

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

**Figure 6 Sorting Controls**



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

**Figure 7 Export Button**



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

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

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

**Figure 8 Table Tools**



### 3.2 Site Filters

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

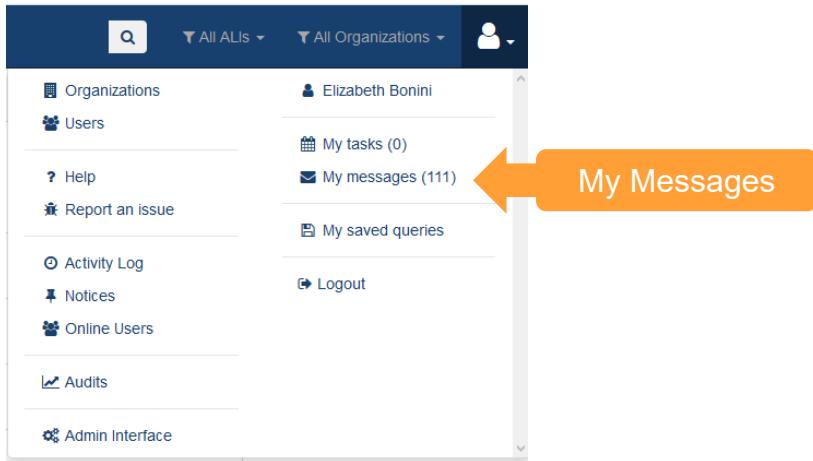
**Figure 9 Filter Icon**



### 3.3 Messages

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

**Figure 10 User Profile  
Messages**



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

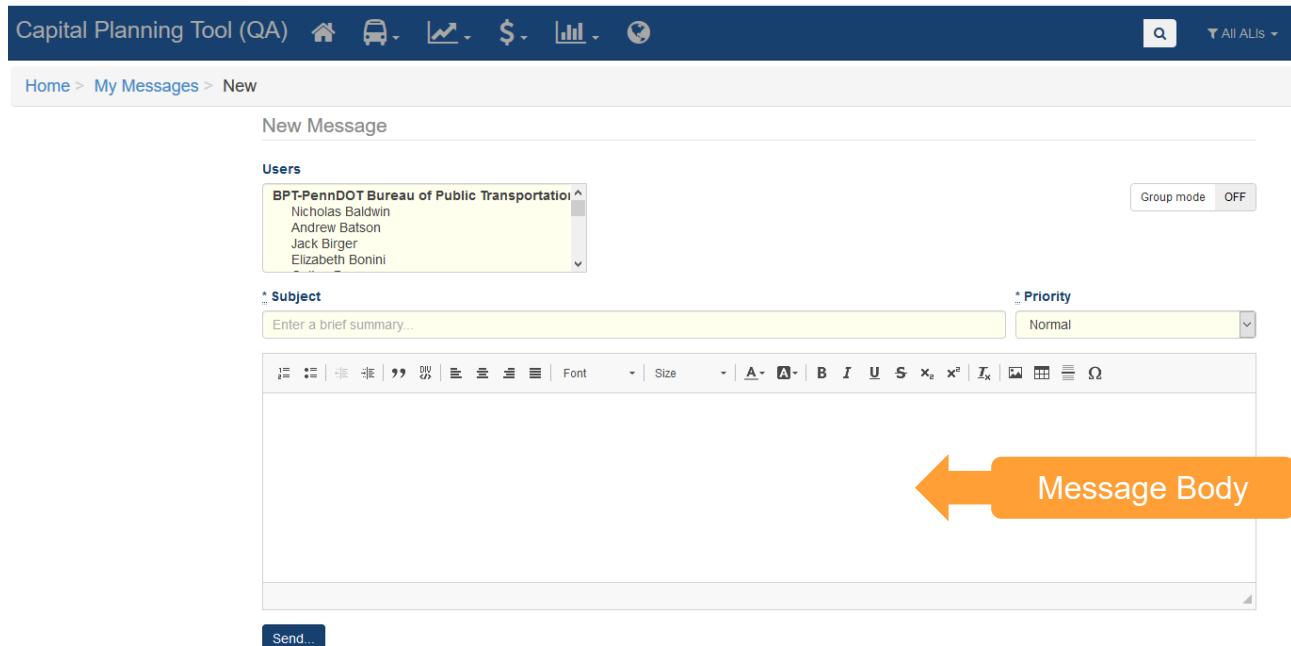
**Figure 11 Messages**

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

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

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

**Figure 12 Message Interface**



### 3.4 Activity Line Item (ALI) Filter

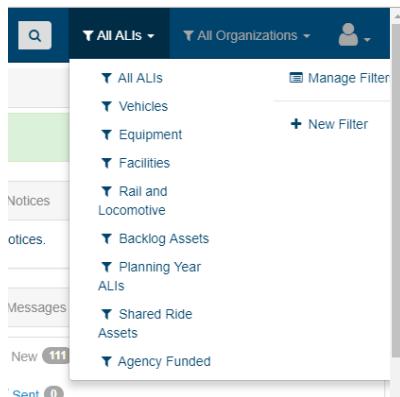
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

**Figure 13 ALI Filter**



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

**Figure 14 ALI Filters**



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

**Figure 15** New ALI Filter

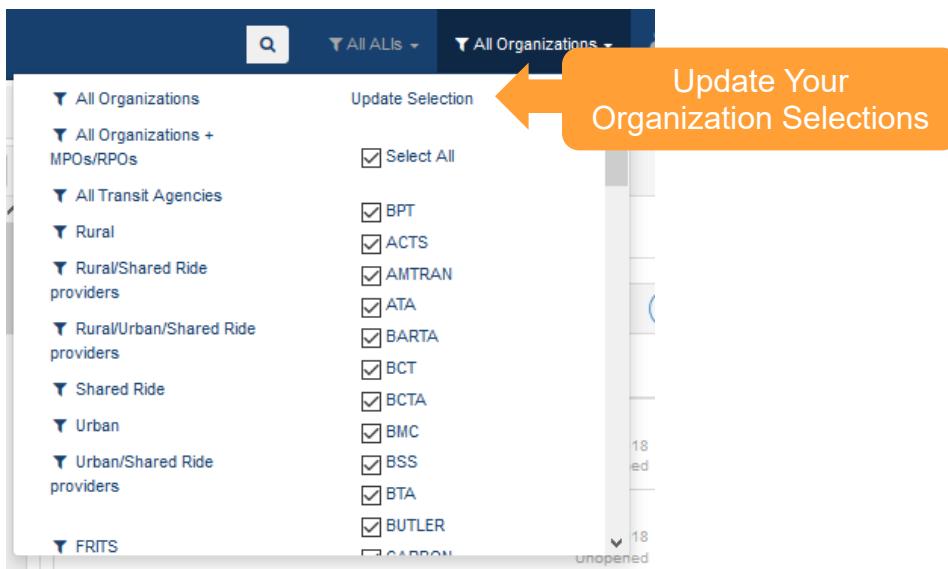
The screenshot shows the 'New ALI Filter' interface. On the left, there's a sidebar with 'Home > ALI Filters > New'. The main area has two columns: 'Details' and 'Parameters'. The 'Details' column contains fields for 'Name' (with placeholder 'Enter a name for this filter'), 'Description' (with placeholder 'Enter a description for this filter'), and 'Shared With' (radio buttons for 'No One', 'BPT', and 'All Organizations'). The 'Parameters' column contains dropdowns for 'Type', 'SOGR' (set to 'All'), 'Scope', 'Project Location', 'Asset Type', 'Asset Subtype', 'Owner', 'Funding', and checkboxes for 'In Backlog' and 'Not fully funded'. At the bottom are two buttons: 'Update ALI Filter' and 'Update and Select This Filter'.

### 3.5 Organizations Filter

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

**Figure 16** Organization Filter

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

**Figure 17 Organization Filter Selections**

### 3.6 Search

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

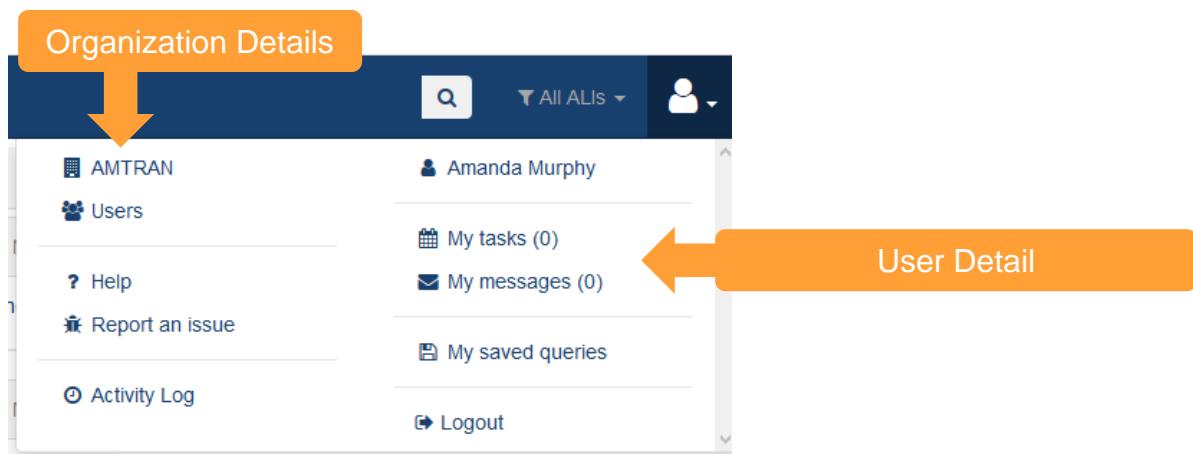
**Figure 18 Search Box**

### 3.7 User and Organization Options

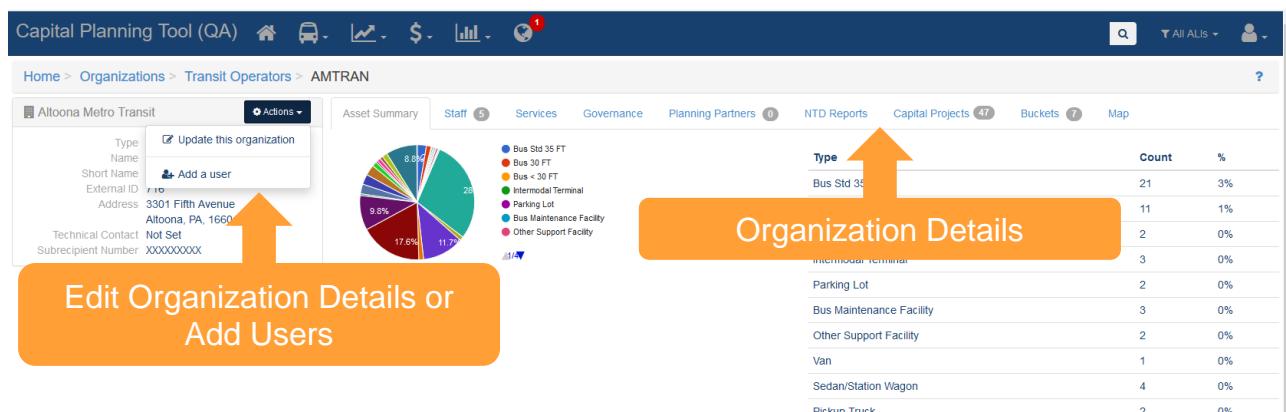
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

**Figure 19 User Menu**

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

**Figure 20 User Menu Dropdown**

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

**Figure 21 Organization Details**

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 links for Home, Users, and My Profile. Below that, a user profile for 'Amanda Murphy' is displayed, including her name, a blue user icon, and a list of contact information: Email (amandamurphy@amtran.org), Primary Phone (999-9999), Address (PA), Role (Agency Manager), and Privileges. To the right of the profile, there's an organization summary for AMTRAN: Address (3301 Fifth Avenue, Altoona, PA, 16601-1801), Phone (999 999-9999). At the bottom left, an orange arrow points from the text 'Edit Profile Details' to the 'Actions' dropdown menu, which contains options like 'Assign myself a task', 'Update my profile picture', 'Update my settings', 'Update my profile', and 'Change my password'.

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

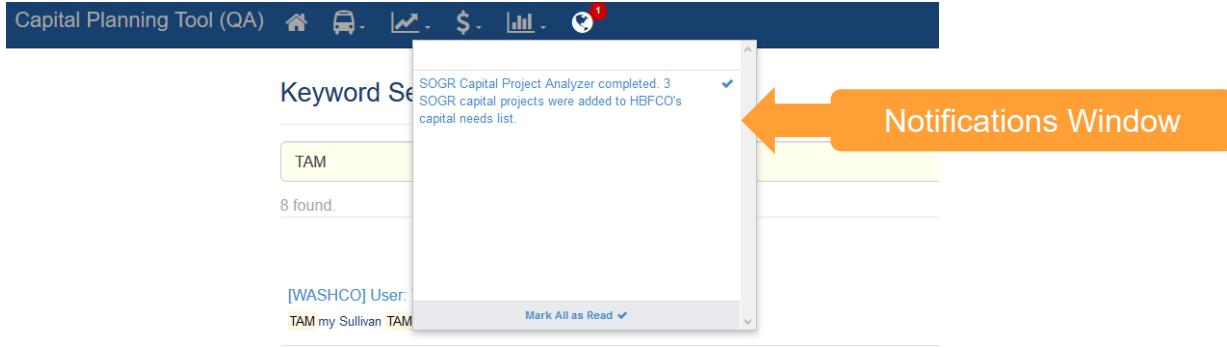
To track down and fix bugs it is helpful if we know what type of web browser you are using particularly if you are using a Microsoft browser. You can usually find this information by selecting the **About** menu item from your browser. If you don't know what browser you are using select **Unknown**.

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"/> <small>Please provide as much detail as you can...</small>	
<input type="button" value="Create Issue"/>	

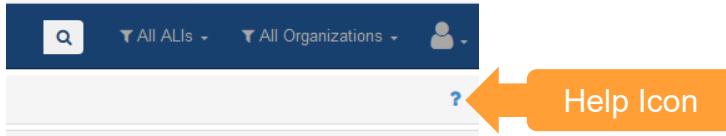
## 3.8 Notifications

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

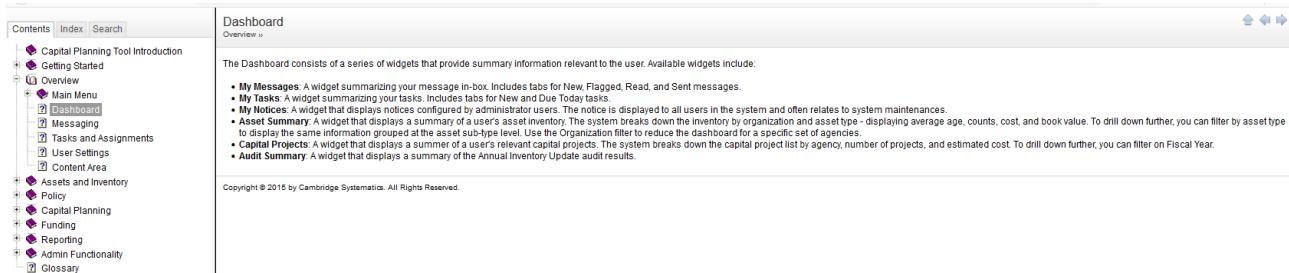
**Figure 24 Notification Drawer**

### 3.9 Help

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

**Figure 25 Help Icon**

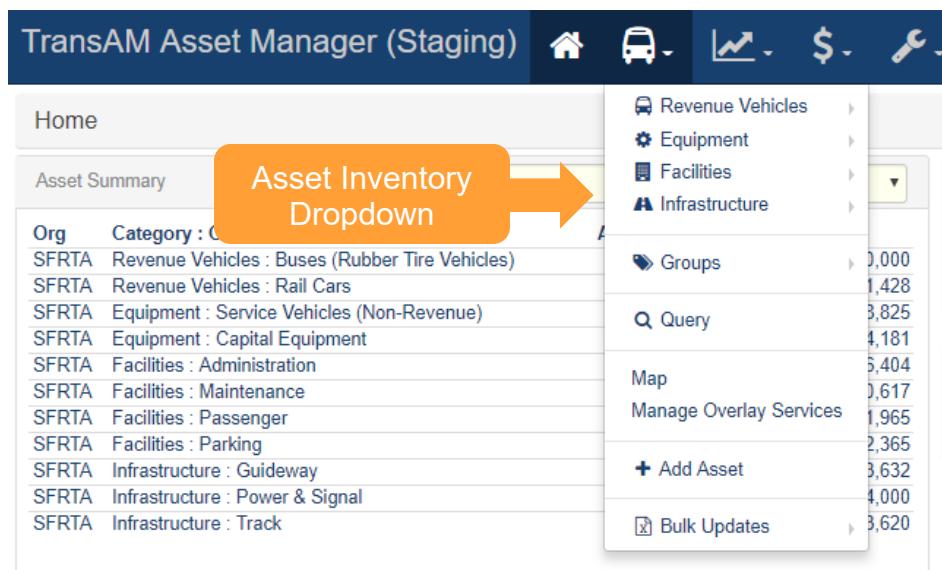
Clicking the help icon will bring you to the help content regarding that page. The help content provides detailed descriptions of each of the page elements. You also can navigate to help content for other pages. Via the contents, index, or search tabs in the left pane.

**Figure 26 Help Content**

## 4.0 Asset Inventory

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

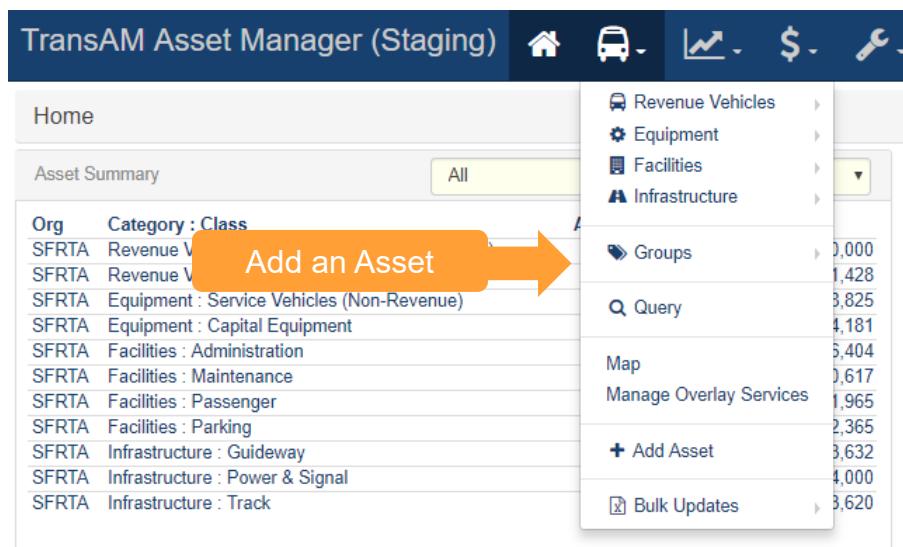
**Figure 27 Asset Inventory Dropdown**



### 4.1 Add an Asset

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

**Figure 28 Adding an Asset**



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

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

Capital Planning Tool (QA) Home Add Asset \$ Graph List Report Help

Home > Add Asset

New Asset

\* Organization  
Select organization...

\* FTA Asset Class  
Select asset class...

Create New Asset

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

**Figure 30 Adding Asset Required Details**

Capital Planning Tool (QA) Home Add Asset \$ Graph List Report Help ? All ALIs All Organizations User Profile

Home > Add Asset

Required Fields Recommended Fields

Organization  
\* Organization  
Altoona Metro Transit

Service Status  
\* Service Status

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

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

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

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

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Funding' fields like 'Cost (Purchase)' and 'Funding Type'. On the right, there are 'Operations' fields like 'Seating Capacity (ambulatory)', 'ADA Accessible', 'In Service Date', 'Primary Mode', and 'Service Type (Primary Mode)'. At the bottom left, there's a button labeled '+ Add Asset & Go to New Record'. An orange callout bubble with an arrow points to this button, which is highlighted with a yellow background. The page footer includes copyright information and a build number.

## 4.2 Accessing Existing Assets

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

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

**Figure 32 Existing Assets**

Click Asset Class to access a list of assets

Type	Avg. Age	Due Date	Agency	Num. Projects
ACTS Revenue Vehicles	2.3	5/29/2018	ACTS	5,793
ACTS Support Facilities	2.0	7/31/2018	AMTRAN	7,751
ACTS Guideway	0.0	\$0	ATA	\$0
ACTS Power & Signal	0.0	\$0	BARTA	\$0
ACTS Track	0.0	\$0	BCT	\$0
AMTRAN Revenue Vehicles	12.0	2/07/2019	BCTA	2,076
AMTRAN Stations/Stops/Terminals	11.0	3/02/2019	BMC	0,465
AMTRAN Support Facilities	29.4	3/02/2019	BSS	3,902
AMTRAN Support Vehicles	4.9	3/02/2019	BTA	2,534
AMTRAN Maintenance Equipment	12.9	3/02/2019	BUTLER	9,698
AMTRAN Facility Equipment	30.2	3/02/2019	CARBON	7,301
AMTRAN IT Equipment	6.6	3/02/2019	CARS	\$20,278
AMTRAN Office Equipment	14.1	3/02/2019	CAT	\$112,098
AMTRAN Communications Equipment	7.5	3/02/2019	CATA*	\$17,292
AMTRAN Signals/Signs	6.8	3/02/2019	CCTA	\$1,790,766
AMTRAN Guideway	0.0	3/02/2019	CHESSR	\$775,479
AMTRAN Power & Signal	0.0	3/02/2019	CLARCO	\$34,504
AMTRAN Track	0.0	3/02/2019	CNTRCO	\$0

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

**Figure 33 Existing Asset Interface**

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GBB2713H3189913	GIL - Gillig Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFE4FS6HDC19987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4FS8HDC16988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4FSXHDC19992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4FS6HDC19990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4FS8HDC19991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4FSXHDC19989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4FS1HDC19993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4FS3HDC19994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4FS5HDC19995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4FS7HDC19996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFE4FS9HDC19997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFE4FS0HDC19998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#800	LCTA	15GGB311J3190014	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	15GGB311J3190015	GIL - Gillig Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
*001	LCTA	1FDFE4FS8HDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*002	LCTA	1FDFE4FSXHDC54955	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
000001501-00	PAAC	15GCB201621111850	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GCB201731111860	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GCB201031111880	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001541-00	PAAC	15GCB201431111896	GIL - Gillig Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2715F185791	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F185793	GIL - Gillig Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

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

**Figure 34 Asset Record: Highlights**

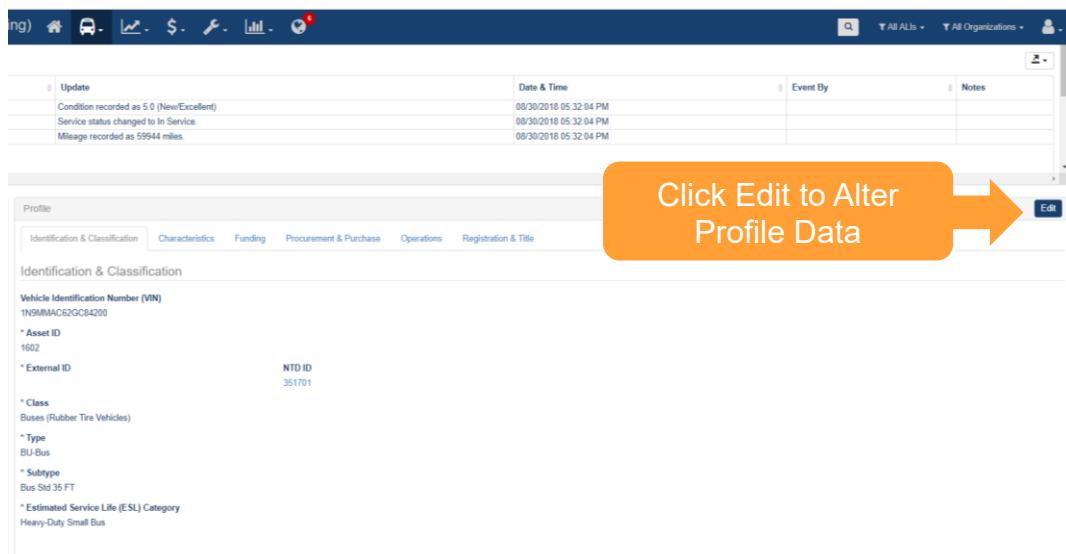
Event	Date	Update	Notes
Condition	2/26/2018	Condition recorded as 5.0 (New/Excellent)	
Service Status Update	2/26/2018	Service status changed to In Service.	

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

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

### 4.3 Editing or Updating Existing Asset Profile Data

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

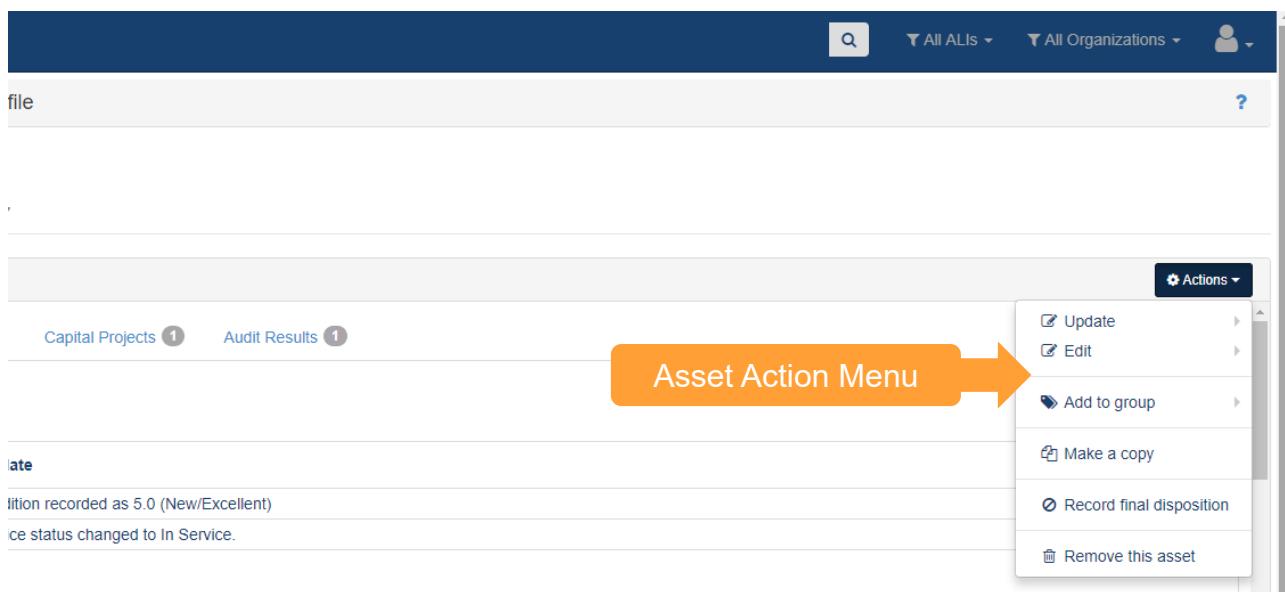
**Figure 36 Editing the Profile of an Existing Asset**

## 4.4 Updating Existing Asset Lifecycle Data

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

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

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

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

## 4.5 Action Events (Disposition and Transfer Review)

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

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

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

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a sidebar with 'Home' and 'Asset Summary' sections. The main area displays a table of assets with columns for Type, Avg. Age, and various metrics. A modal window titled 'Action Events' is open, showing two options: 'Early Disposition Proposed' and 'Newly Transferred Assets'. An orange arrow points from the text 'Action Events Menu' to this modal. In the bottom right corner, there's a 'Audit Summary' section with a chart titled 'Annual Inventory Update Results' showing completion percentages for different asset types across various agencies.

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

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

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

**Figure 39 Early Disposition Requests**

The screenshot shows the Capital Planning Tool (QA) interface with the title 'Home > Early disposition proposed'. Below the title are three buttons: 'Export All', 'Approve', and 'Reject'. An orange arrow points from the text 'Approve or Reject requests' to the 'Approve' and 'Reject' buttons. The main area is a table listing early disposition proposals. Each row contains a checkbox, a star icon, the agency name, the asset type, the asset tag, a detailed description, and status information. The table has columns for Agency, Type, Asset Tag, Description, Parent, Location, Status, Age, and Co.

<input type="checkbox"/>	<span>★</span>	Agency	Type	Asset Tag	Description	Parent	Location	Status	Age	Co
<input type="checkbox"/>	<span>★</span>	RRTA	Bus Maintenance Equipment	2314	BUS LIFTS-LORISER IN-GROUND HYDRAULIC LIFT			O	13	
<input type="checkbox"/>	<span>★</span>	BARTA	Bus Std 35 FT	0409	CCI Opus 34 LF			O	14	
<input type="checkbox"/>	<span>★</span>	YCTA	Bus < 30 FT	5010	CMC Challenger			O	1	

## 4.6 Adding or Updating Assets by Bulk Update

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

**Figure 40 Bulk Updates**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Bus, Graph, Money, Bar Chart, and a globe. Below the navigation bar is a sidebar with links like Revenue Vehicles, Equipment, Facilities, Infrastructure, Groups, Action Events, Map, Manage Overlay Services, and a prominent '+ Add Asset' button. To the right of the sidebar is a 'Capital Projects' section listing various agencies. In the center, there's a table titled 'Asset Summary' with columns for Type, Avg. Age, and several monetary values. A large orange arrow points from the text 'Bulk Updates' to the '+ Add Asset' button, which is highlighted with an orange box.

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

**Figure 41 Bulk Update Tools**

The screenshot shows the 'Bulk Update Tools' page. At the top, there's a header with the same navigation icons as Figure 40. Below the header, the URL 'Home > Bulk Updates' is shown. There are three buttons at the top left: 'Create a new Template' (highlighted with an orange box and an orange arrow pointing to it), 'Upload a Template', and 'Filter Status'. The main area is a table with columns for Agency, File Name, Content, Loaded By, Status, Num Rows Processed, and Num Rows Added. The table contains three rows of data. An orange box labeled 'Bulk Update Tools' covers the bottom portion of the table.

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

## Figure 42 Bulk Update Details

Capital Planning Tool (QA) 🔍 All ALIs ✖ All Organizations 👤

Home > Bulk Updates > Download Template

**Bulk Update Templates**

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

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

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

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

**Select Template and Asset Type**

**Template Type**: Inventory Updates

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

**Organization**: Organization dropdown

**Create template** button

**Choose these parameters**

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

## Figure 43 Bulk Update Spreadsheet Download

Capital Planning Tool (QA) 🔍 All ALIs ✖ All Organizations 👤

Home > Bulk Updates > Download Template

**Success**

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

**Download File**

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

## Figure 44 Bulk Update Spreadsheet

Asset	Object Key	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Reporting Date	New Status	Reporting Date	Current Condition	Rep.
3	A2E18C2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN08YYU020684	In Service	01/23/2018			1.00	01
4	A2E18C29FDGK6	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN07DXYU020685	In Service	01/23/2018			1.00	01
5	A2E18C3G088A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	SFYD2TN01YYU020686	In Service	01/23/2018			1.00	01
6	A2E18C47GK4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291951090105	In Service	01/23/2018			1.00	01
7	A2E18C47M4FE	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291951090106	In Service	01/23/2018			2.00	01
8	A2E18C56GK2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291251090107	In Service	01/23/2018			2.00	01
9	A2E18C665JDCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291451090108	In Service	01/23/2018			2.00	01
10	A2E18C695LBR	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291651090109	In Service	01/23/2018			2.00	01
11	A2E18C79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE291251090110	In Service	01/23/2018			2.00	01
12	A2E18C800038	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271981091596	In Service	01/23/2018			2.00	01
13	A2E18C817GK2	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271081091596	In Service	01/23/2018			2.00	01
14	A2E18C893ISGC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271281091597	In Service	01/23/2018			2.00	01
15	A2E18C935EM0	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271281091598	In Service	01/23/2018			2.00	01
16	A2E18C9AA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271681091599	In Service	01/23/2018			2.00	01
17	A2E18CB09HDPC	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271281091599	In Service	01/23/2018			2.00	01
18	A2E18C9EB5MK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271481091599	In Service	01/23/2018			2.00	01
19	A2E18C9C4N614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271681091512	In Service	01/23/2018			2.00	01
20	A2E18C9GL0KL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271991091652	In Service	01/23/2018			2.00	01
21	A2E18C9DB97DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271091091653	In Service	01/23/2018			2.00	01
22	A2E18CE07EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271291091654	In Service	01/23/2018			2.00	01
23	A2E18CEF3ECK	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271491091655	In Service	01/23/2018			2.00	01
24	A2E18CF54C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271691091656	In Service	01/23/2018			2.00	01
25	A2E18CFNSG4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271891091657	In Service	01/23/2018			2.00	01
26	A2E18CGGK040	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271X91091658	In Service	01/23/2018			2.00	01
27	A2E18CGG3JG	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271191091659	In Service	01/23/2018			2.00	01
28	A2E18CHBIAIB0	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271891091660	In Service	01/23/2018			2.00	01
29	A2E18CHKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271X91091661	In Service	01/23/2018			2.00	01
30	A2E18CIA78K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gllg 29LF	IGGE271191091662	In Service	01/23/2018			2.00	01
31	A2E18CIN06GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29165111645	In Service	01/23/2018			2.00	01
32	A2E18CJUCFK1	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29185111646	In Service	01/23/2018			2.00	01
33	A2E18CK1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB291X5111647	In Service	01/23/2018			2.00	01
34	A2E18CL8K4	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	IGCB29151111648	In Service	01/23/2018			2.00	01
35	A2E18GL8SC44	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gllg 35'	IGGB271291079888	In Service	01/23/2018			2.00	01
36	A2E18GLUHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gllg 35'	IGGB271291079889	In Service	01/23/2018			2.00	01
37	A2E18GMNPW4	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gllg 35'	IGGR271841178187	In Service	01/23/2018			2.00	01

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

**Figure 45 Bulk Update Upload**

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

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

**Figure 46 Bulk Upload Processing**

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

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

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

**Figure 47 Bulk Update Edit**

Capital Planning Tool (QA)

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

**File Upload**

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

**Actions**

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

**Details**

Processing   Process Log   Updates

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

## 4.7 Query

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

**Figure 48 Asset Query**

TransAM Asset Manager (Staging)

Home

Asset Summary   All

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

**Query your Assets**

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

Capital Projects  
Agency: SFRTA

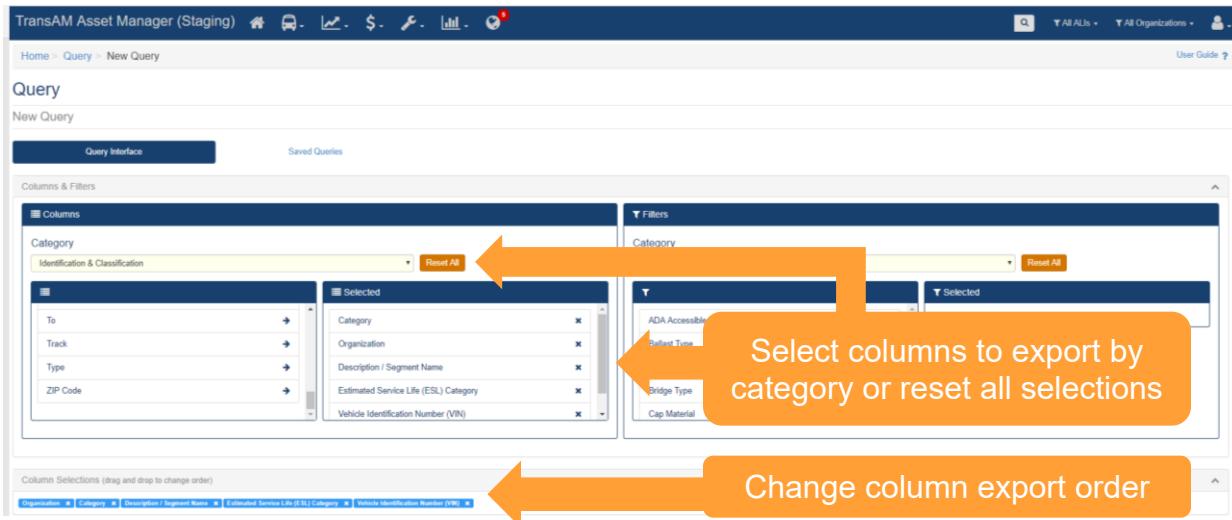
Audit Summary

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

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

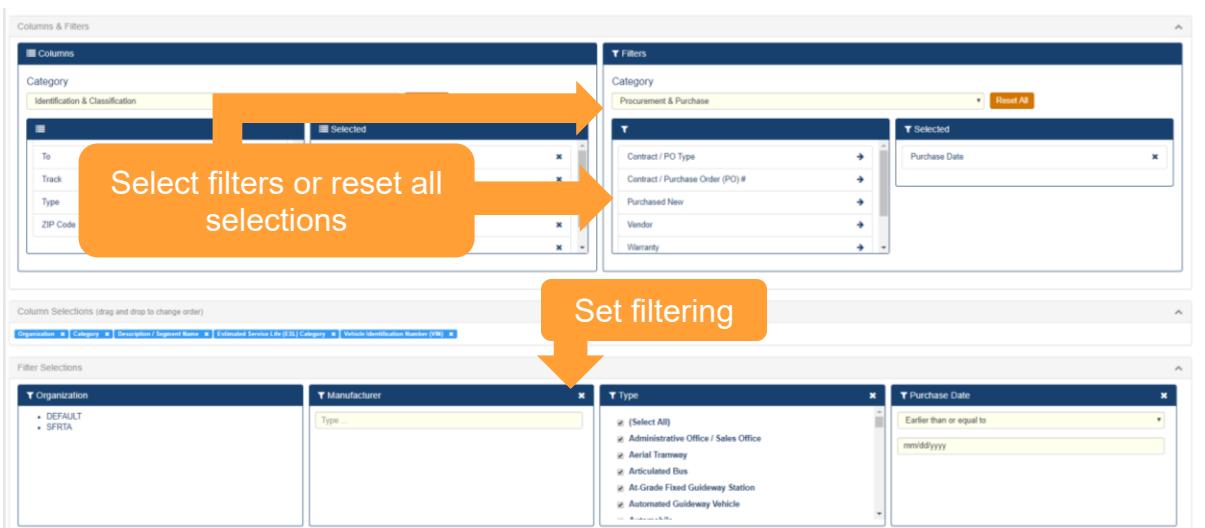
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

**Figure 49 Column Selection**



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

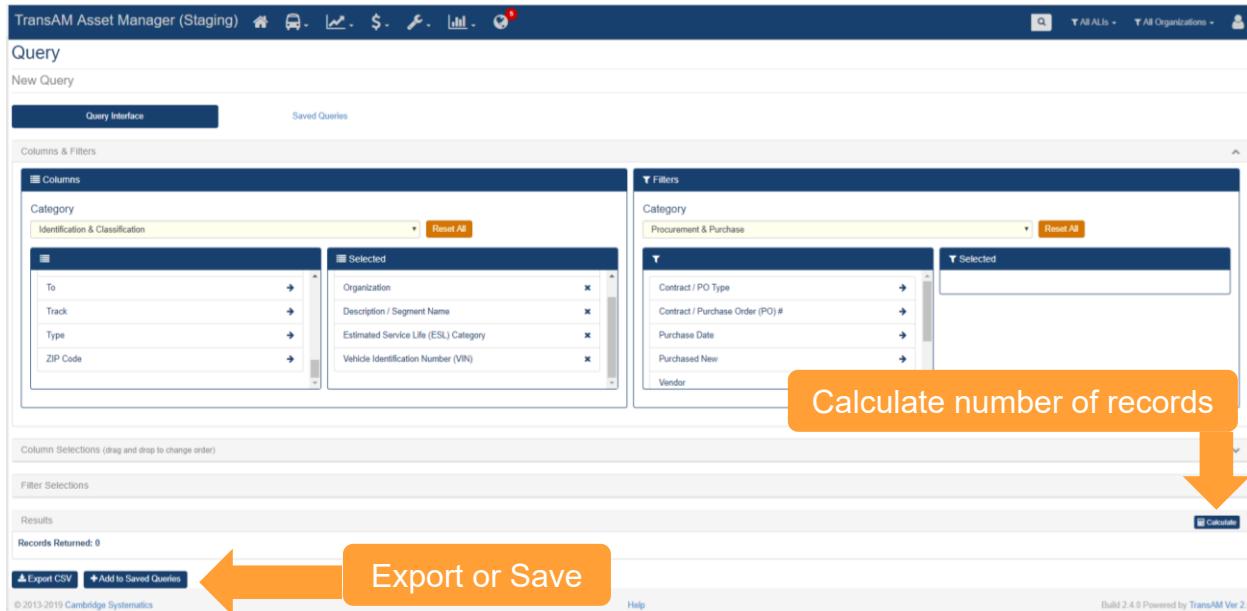
**Figure 50 Filter Selection**



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

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

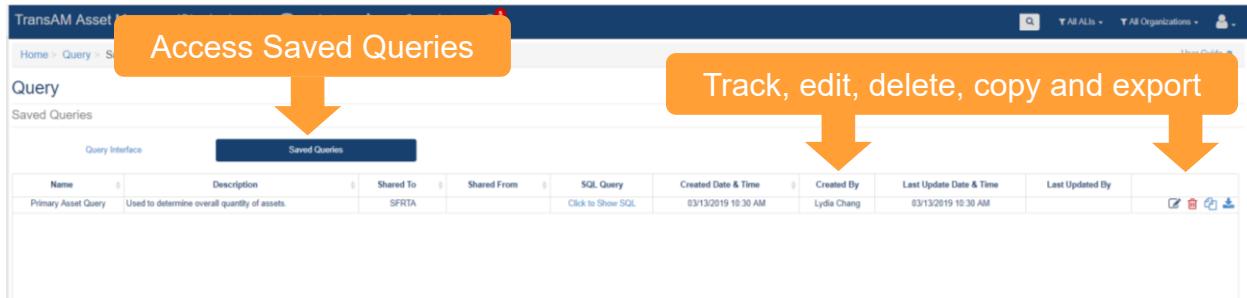
**Figure 51 Calculate, Export or Save**



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

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

**Figure 52 Saved Queries**



## 4.8 Map

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

**Figure 53 Asset Map**

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there's a table titled "Asset Summary" listing various asset types and their average age. On the right, a sidebar titled "Map your Assets" contains a list of agencies and a section for managing overlay services. An orange callout box points to the sidebar with the text "Map your Assets".

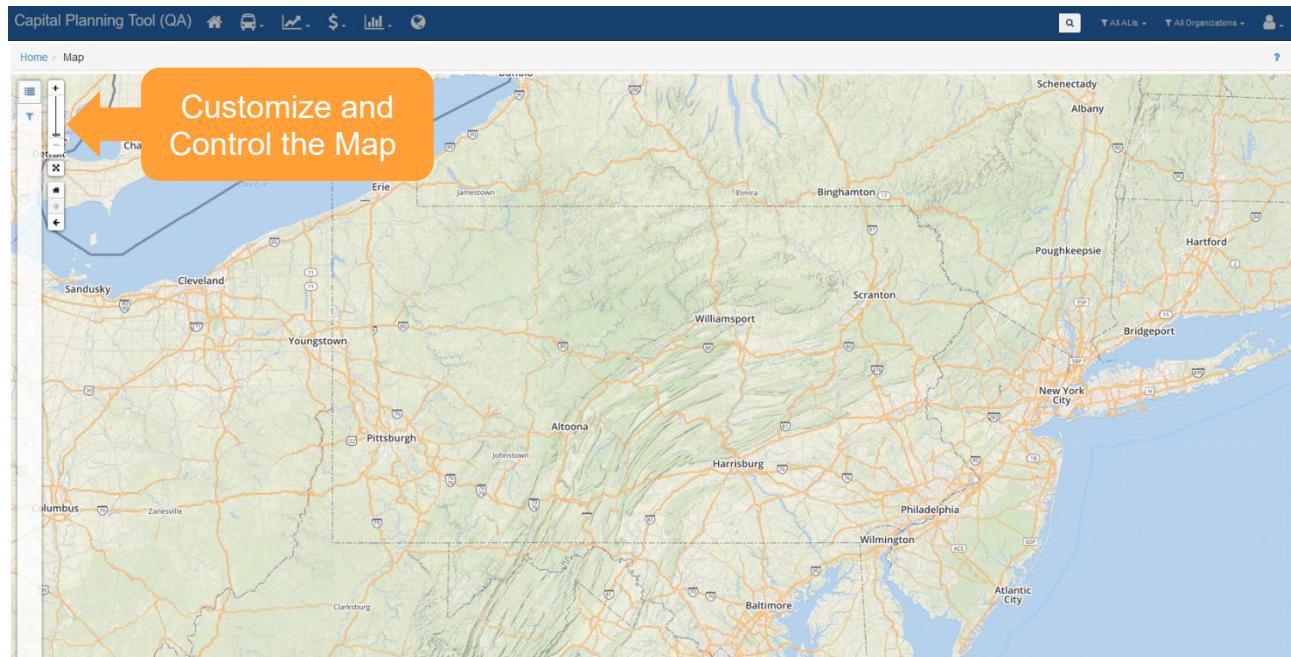
Type	Avg. Age
ACTS Revenue Vehicles	2.3
ACTS Support Facilities	2.0
ACTS Guideway	0.0
ACTS Power & Signal	0.0
ACTS Track	0.0
AMTRAN Revenue Vehicles	12.0
AMTRAN Stations/Stops/Terminals	11.0
AMTRAN Support Facilities	29.4
AMTRAN Support Vehicles	4.9
AMTRAN Maintenance Equipment	12.9
AMTRAN Facility Equipment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

**Map your Assets**

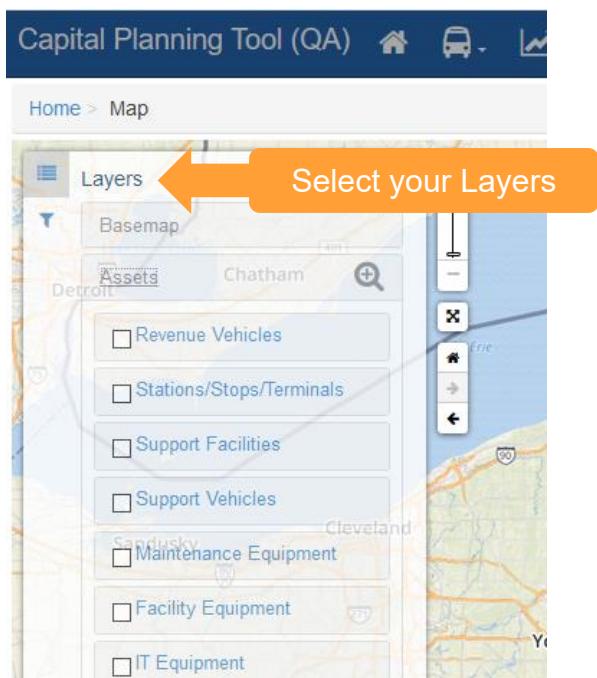
- Capital Projects
- Agency
  - ACTS
  - AMTRAN
  - ATA
  - BARTA
  - BMC
  - BSS
  - BTA
  - BUTLER
  - CARBON
  - CARS
  - CAT
  - CATA\*

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

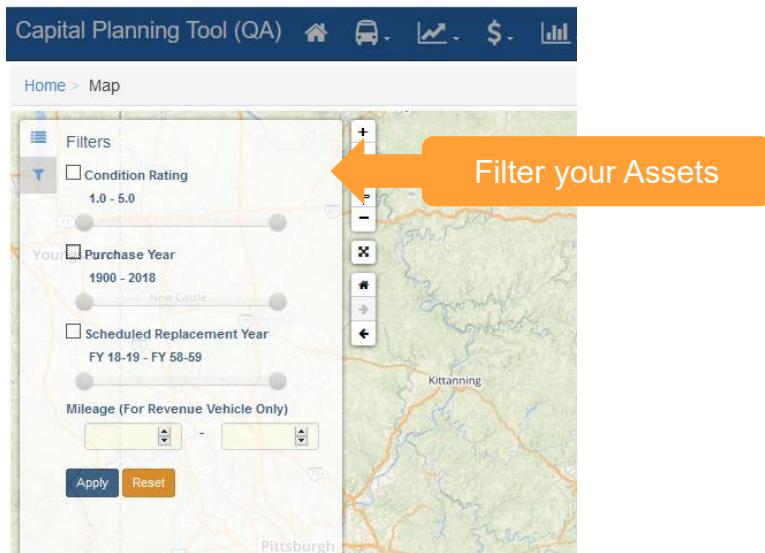
**Figure 54 Map Customization**



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

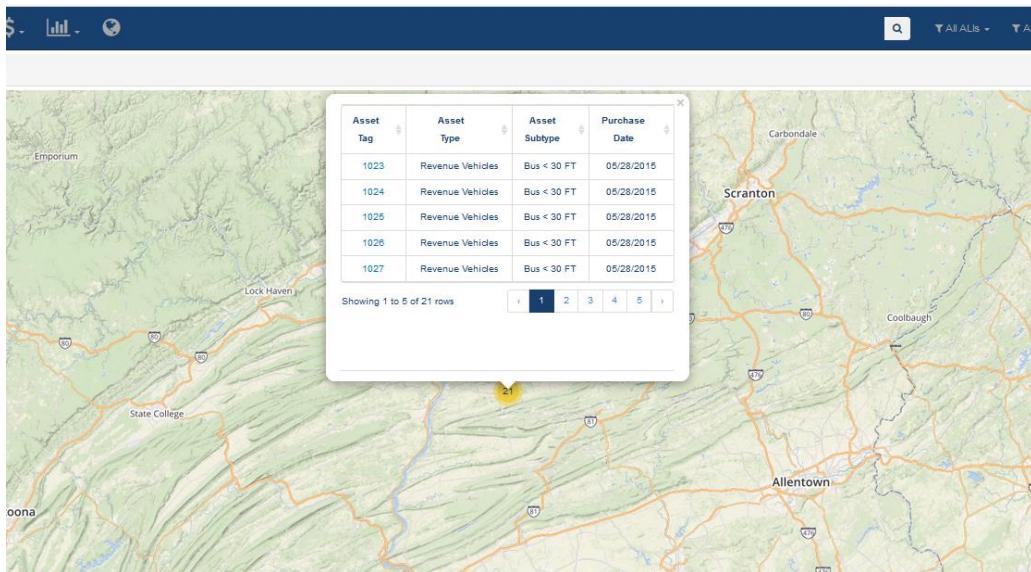
**Figure 55 Map Layers**

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

**Figure 56 Map Filter**

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

**Figure 57 Map Asset Details**



## 4.9 Groups

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

**Figure 58 Asset Groups**

Capital Planning Tool (QA)

Home

Asset Summary

Type	Avg. Age
ACTS Revenue Vehicles	2.3
ACTS Support Facilities	2.0
ACTS Guideway	0.0
ACTS Power & Signal	0.0
ACTS Track	0.0
AMTRAN Revenue Vehicles	12.0
AMTRAN Stations/Stops/Terminals	11.0
AMTRAN Support Facilities	29.4
AMTRAN Support Vehicles	4.9
AMTRAN Maintenance Equipment	12.9
AMTRAN Facility Equipment	30.2
AMTRAN IT Equipment	6.6
AMTRAN Office Equipment	14.1
AMTRAN Communications Equipment	7.5
AMTRAN Signals/Signs	6.8
AMTRAN Guideway	0.0
AMTRAN Power & Signal	0.0
AMTRAN Track	0.0

Groups

Action Events

Map

Manage Overlay Services

+ Add Asset

Bulk Updates

Capital Projects

Agency

Num

- buses that are 35ft in length
- Fleet Plan Audit
- Cumberland County
- Maintenance Facility
- Franklin County
- Union-Snyder Counties
- Columbia County
- Montour County
- Perry County
- Disposal to Be Finalized

Groups

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

## Figure 59 Adding an Asset to a Group

The screenshot shows the Capital Planning Tool (QA) interface for a Revenue Vehicle Profile. The top navigation bar includes links for Home, Revenue Vehicles, Buses (Rubber Tire Vehicles), and Buses (Rubber Tire Vehicles) Profile. The main content area displays a 'Revenue Vehicle Profile' for a vehicle with CAT as the owner, asset tag #1701, and a 35' Low Floor model from Gillig. The 'Highlights' section shows event history, tasks, comments, documents, photos, charts, asset values, capital projects, and audit results. A large orange arrow points to the 'Actions' dropdown menu on the right, which contains options like Update, Edit, Add to group, Make a copy, Record final disposition, and Remove this asset. The 'Add to group' option is specifically highlighted with a blue background.

## 5.0 Maintenance

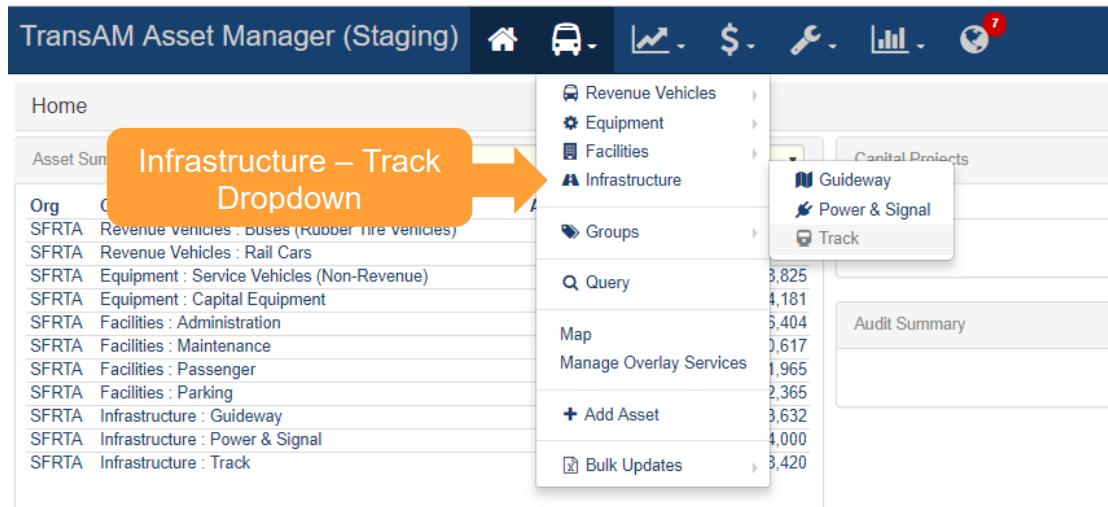
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

### 5.1 Performance Restrictions

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

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

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



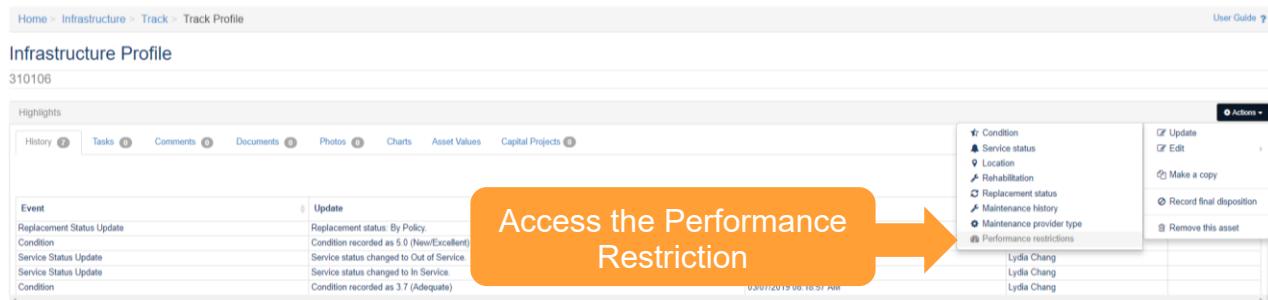
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

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

The screenshot shows a table of Infrastructure - Track records. The columns include Asset ID, Organization, Line (from), From, Line (to), To, Class, Subtype, Description, Main Line / Division, Branch / Subdivision, Track, Segment Type, Location, Last Life Cycle Action, Life Cycle Action Date, and Status. An orange callout bubble points to the 'Asset ID' column header, with the text 'Access the Infrastructure – Track Record' inside it. The table lists several entries for the South Florida Rail Corridor, including rows for 310000 through 310109. At the bottom, there are pagination controls showing page 1 of 10 of 275 rows.

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

**Figure 62 Lifecycle Action Menu**



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

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

**Figure 63 Performance Restriction Lifecycle Event**

The 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 'Associated Linear Asset Records' section lists 310107, 310108, 310109, and 310110. A note on the right explains the use of Performance Restriction Events. A large orange callout at the bottom left points to the 'Update Performance Restrictions' button.

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

**Figure 64 Maintenance Dropdown**

The screenshot shows the TransAM Asset Manager (Staging) interface. At the top, there is a navigation bar with icons for Home, Assets, Reports, and Help. Below the navigation bar, a dropdown menu is open, labeled "Maintenance Dropdown". The main content area displays three tables: "Asset Summary" (listing various asset categories like Revenue Vehicles, Equipment, Facilities, etc., with columns for Org, Category : Class, Avg. Age, Count, and Cost), "Capital Projects" (listing projects by Agency, Num. Projects, and Cost), and "Audit Summary" (indicating "No active audits found").

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

**Figure 65 Performance Restriction Management**

The screenshot shows a table titled "Performance Restrictions" with a heading "Active Restrictions". The table has columns for Status, Asset / Segment ID, Org, Desc / Segment Name, Subtype, Line, From, Line, To, Track, Max Permissible Speed, Unit, Speed Restriction, Restriction Cause, Active Start, Active End, Submitted By, Status, and Comments. There are 7 rows of data, each representing a different restriction event. The "Status" column for all rows shows "Active". The "Comments" column for the first row shows "Closeout".

Status	Asset / Segment ID	Org	Desc / Segment Name	Subtype	Line	From	Line	To	Track	Max Permissible Speed	Unit	Speed Restriction	Restriction Cause	Active Start	Active End	Submitted By	Status	Comments	
Active	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	Until Removed		Active	Closeout
Active	310104	SFRTA	N/A	Tangent (Straight)	SX	970.20	SX	970.40	2	30	mph	20	mph	Rail Defect	03/06/2019 09:52	Until Removed	Lydia Chang	Active	Closeout
Active	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	Until Removed	Lydia Chang	Active	Closeout
Active	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	03/19/2019 11:19	Lydia Chang	Active	Closeout
Active	Multiple	SFRTA	Multiple	Multiple	SX	991.08	SX	992.00	Single	Multiple	mph	28	mph	Rail Defect	03/13/2019 02:18	Until Removed	Lydia Chang	Active	Closeout
Active	Multiple	SFRTA	Multiple	Multiple	SX	964.10	SX	965.00	Single	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:19	Until Removed	Lydia Chang	Active	Closeout
Active	Multiple	SFRTA	Multiple	Multiple	SX	969.10	SX	970.00	Single	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:22	Until Removed	Lydia Chang	Active	Closeout

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 66 Policies Dropdown**

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

Agency	Num. Projects	Cost
ACTS	2	\$85,768
AMTRAN	5	\$1,287,100
ATA	11	\$2,156,774
BARTA	2	\$8,142,424
BCT	3	\$1,843,909
BCTA	3	\$236,000
BMC	1	\$97,020
BSS	2	\$528,432
BTA	7	\$9,003,734
BUTLER	1	\$100,000
CARBON	1	\$570,000
CARS	1	\$134,239
CAT	4	\$6,555,761

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

**Figure 67 Policy Rule Sets**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for Home, Bus, Graph, Money, and a globe. Below the navigation bar is a main content area. On the left, there is a link "Home > Policies". On the right, there are two policy rule sets: "Asset Replacement/Rehabilitation ..." and "TAM Policy". An orange arrow points from the text "Policy Rule Sets" to the "TAM Policy" link. The "TAM Policy" link has a small icon of a document with a checkmark.

### 6.1 Asset Replacement/Rehabilitation Policy

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

**Figure 68 Asset Replacement/Rehabilitation Policy**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. Below this is a table titled 'Asset Summary' showing data for various asset types like ACTS Revenue Vehicles, AMTRAN Revenue Vehicles, etc. To the right, a list of organizations is shown with their respective counts and book values. An orange callout bubble points to a button labeled 'Asset Replacement/Rehabilitation Selection'.

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

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

This screenshot shows the 'Asset Replacement/Rehabilitation Policy' filters page. It includes a breadcrumb trail: Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy. The main area displays policy details for 'BPT-PennDOT Bureau of Public Transportation' under 'FY 2017 Statewide Transit Policy (Current)'. The 'Filters' section contains dropdowns for 'Organization' (set to 'BPT-PennDOT Bureau of Public Transportation') and 'Policy Year' (set to 'FY 2017 Statewide Transit Policy'). Arrows point from labels 'Organization Filter' and 'Policy Year' to these dropdowns. Other visible settings include 'Condition Threshold: 2.50', 'Depreciation Calculation Type: Straight Line', and 'Depreciation Interval: Annually'. A table at the bottom lists various asset categories with their respective service life calculation methods, replacement cost calculation methods, condition rollup calculation methods, annual inflation rates, percent residual values, and last updated dates.

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

## Figure 70 Policy Rules

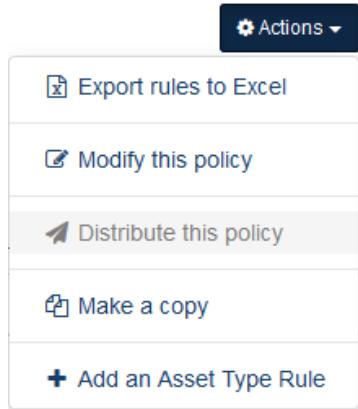
The screenshot shows the 'Policy Rules' page with the following details:

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

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

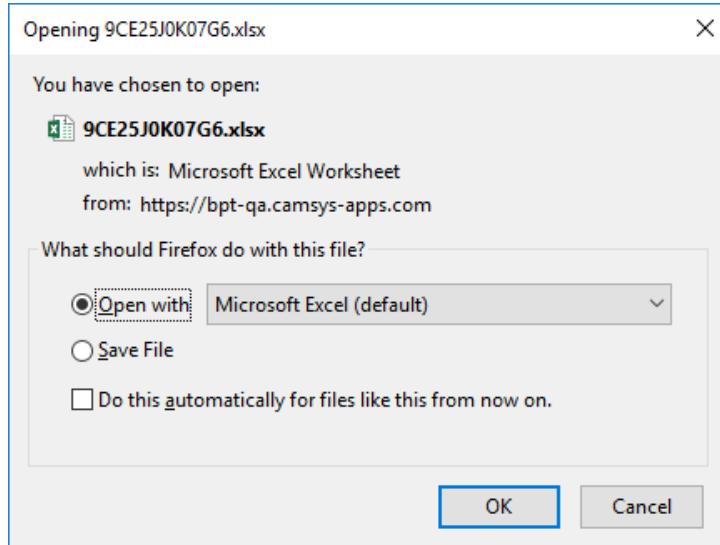
The Actions button will display a list of options as shown.

## Figure 71 Policy Rules Actions Dropdown



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

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



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

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

## Update Policy

The screenshot shows a form titled "Update Policy". It includes the following fields:

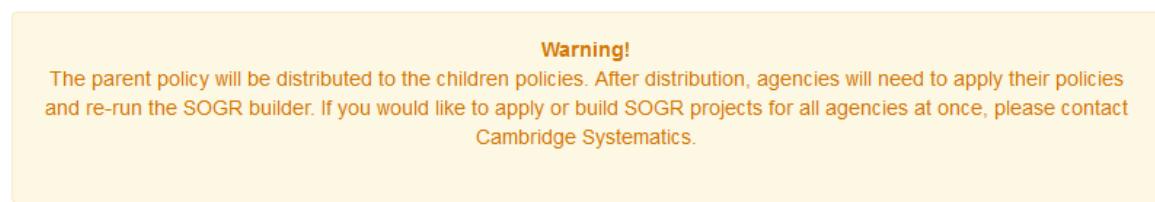
- Description:** FY 2017 Statewide Transit Policy
- \*Condition Threshold:** 2.5
- \*Depreciation Calculator:** Straight Line
- \*Depreciation Interval:** Annually

At the bottom is a blue "Update Policy" button.

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

**Figure 74 Distribute Policy**

## Distribute 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 75 Copy Organization Policy Dialog**

## Update Policy

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

\* **Condition Threshold**  
2.5

\* **Depreciation Calculator**  
Straight Line

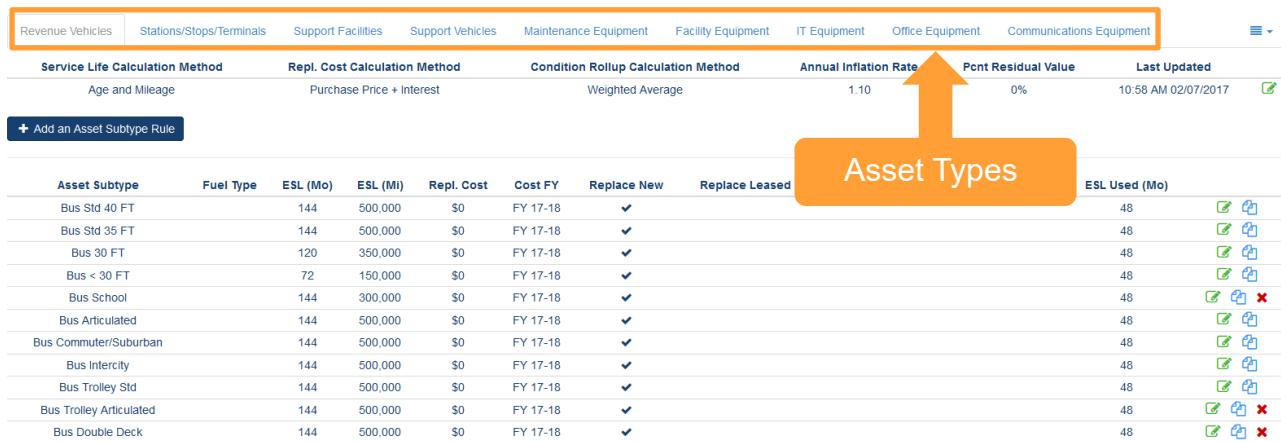
\* **Depreciation Interval**  
Annually

**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 76 Asset Types**



The screenshot shows a table of asset subtypes under the 'Asset Types' tab. The table has columns for Asset Subtype, Fuel Type, ESL (Mo), ESL (Mi), Repl. Cost, Cost FY, Replace New, Replace Leased, and ESL Used (Mo). An orange callout points to the 'Asset Types' header, which is highlighted in yellow. The table contains 15 rows of data, each representing a different bus type with its specific parameters.

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 77 Additional Assets Dropdown Icon**



The Asset Type Rules are listed below the Asset Types.

## Figure 78 Asset Type Rules

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

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

## Figure 79 Add an Asset Type Rule Dialog Box

Add an Asset Type Rule

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

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

## Figure 80 Edit Icon



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

**Figure 81 Modify Asset Policy Rule**

### Modify Rule: IT Equipment

* Service Life Calculation Type	* Replacement Cost Calculation Type	Condition Rollup Calculation Type
Age Only	Purchase Price + Interest	Weighted Average
* Annual Inflation Rate	* Pcnt Residual Value	* Condition Rollup Weight
1.1	0	0
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

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

**Figure 82 Asset Type and Asset Subtype rules**

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

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

**Figure 83 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 84 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 Code \* Lease Replacement Code \* Purchase Expansion Code \* Lease Expansion 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 85 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 Code \* Lease Replacement Code  
12.22.06 12.26.06

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

**Save** **Cancel**

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

**Figure 86 Remove Asset Subtype Rule**

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

**Cancel** **Yes**

## 6.2 TAM Policy

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

**Figure 87 TAM Policy Dropdown Menu Selection**

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

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

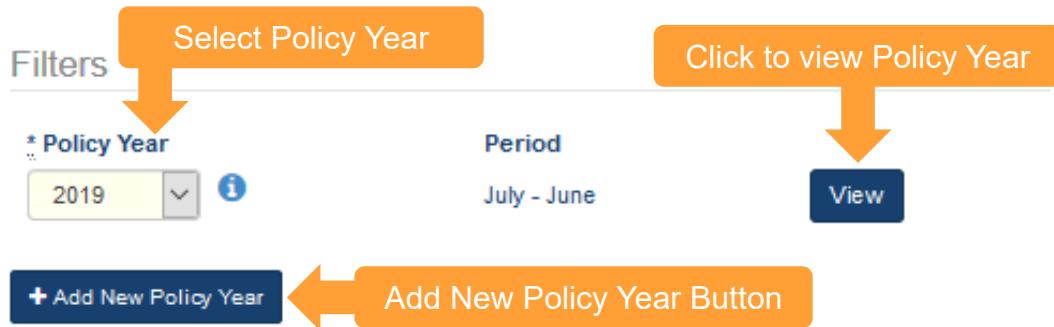
**Figure 88 TAM Policy Group Management**

The screenshot shows the "Group Management" tab selected under the "TAM Policy" section. At the top, there is a navigation bar with icons for Home, Bus, Graph, Dollar Sign, and a globe. Below the navigation bar is a breadcrumb trail: Home > Policies > TAM Policy > Group Management. The main area contains a table with columns for Policy Year (dropdown set to 2019), Period (dropdown set to July - June), and View button. A large orange callout bubble points to the "Group Management" tab, with the text "Group Management tab" inside it. Below the table are "Filters" and a "Add New Policy Year" button.

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 89 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 90 Add New TAM Policy Year**

The screenshot shows a 'TAM Policy' dialog box titled 'Add New Policy Year'. It contains fields for 'Policy Year' (set to '2022') and 'Period' (set to 'July - June'). There is also a checkbox for 'Copy Groups From Previous Policy Year' with options 'Yes' and 'No'. At the bottom are 'Save' and 'Cancel' buttons. A callout box highlights the 'Copy Groups From Previous Policy Year' checkbox with the text: 'Copying groups from the previous year, will save you the effort of recreating groups and performance measures'.

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 91 Group Management Period and Year**

Group Management : 2019 : July - June



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

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

**Figure 92 Add Group Button**

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

**Figure 93 Add TAM Group Dialog**

TAM Group

Add Group

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

Not Selected

Search...

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

Selected

**\* Asset Categories**

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

**Figure 94 Add TAM Group Dialog  
With Selections**

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

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

**Figure 95 Add TAM Group  
Selections, Asset Categories**

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

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

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

**Figure 96 TAM Group Mangement Status**

Group Management : 2022 : July - June

+ Add Group

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

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

**Figure 97 TAM Policy Group Metrics**

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

TAM Policy

Group Management **Group Metrics** Performance Measures

Filters

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

Select Policy Year, Group Name and click View

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

## Figure 98 Editable and Locked Assets

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

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

## Figure 99 Asset Type Percentage Settings

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

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

**Figure 100 Distribute TAM Policy**

TAM Policy

Group Management   Group Metrics   Performance Measures

Filters

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

Group Metrics : 2018 : July - June : New Group

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

Revenue Vehicles

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

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

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

**Figure 101 Distributed TAM Policy**

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

TAM Policy

Group Management   Group Metrics   Performance Measures

Filters

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

+ Add New Policy Year

Group Management : 2018 : July - June

+ Add Group

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

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 102 TAM Policy Performance Measures

Capital Planning Tool (QA) 🔍 All ALIS ⚙️

Home > Policies > TAM Policy > Performance Measures ?

**TAM Policy**

Group Management Group Metrics Performance Measures Performance Measures

Filters

* Policy Year 2021	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<b>View</b>
-----------------------	-----------------------	---------------------------	--	-------------

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 103 Policy Year Filters

Filters

* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<b>View</b>
-----------------------	-----------------------	---------------------------	--	-------------

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 104 Asset Type Percentage Settings

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

Asset Category Revenue Vehicles	Group Name New Group	Agency Status Pending Activation		
<b>Revenue Vehicles</b>				
Asset Class/Type	ULB	Editable/Locked	Goal Pcnt	Editable/Locked
AO-Automobile	8	Editable	10	Editable
BU-Bus	14	Editable	20	Editable
CU-Cutaway	10	Editable	25	Editable
OR-Other	0	Locked	10	Locked
SV-Sports Utility Vehicle	8	Editable	10	Editable

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

**Figure 105 Activate Performance Measures**

TAM Policy

Group Management	Group Metrics	Performance Measures																									
<p>Filters</p> <table> <tr> <td>* Policy Year 2018</td> <td>Period July - June</td> <td>* Group Name New Group</td> <td>* Organization BCTA-Beaver County Transit Authority</td> <td><a href="#">View</a></td> </tr> <tr> <td colspan="5">Performance Measures : 2018 : July - June : New Group : BCTA</td> </tr> <tr> <td>Asset Category Facilities</td> <td>Group Name New Group</td> <td>Agency Status Pending Activation</td> <td colspan="2"> <input type="button" value="Activate"/> <div style="background-color: orange; border-radius: 10px; padding: 5px; display: inline-block;">           Activate Button            </div> </td> </tr> <tr> <td>Asset Class/Type Passenger</td> <td>TERM 3</td> <td>Editable/Locked <input checked="" type="checkbox"/></td> <td>Goal Pcnt 0</td> <td><input type="button" value="Editable"/></td> </tr> <tr> <td>Parking</td> <td>3</td> <td><input checked="" type="checkbox"/></td> <td>0</td> <td><input type="button" value="Editable"/></td> </tr> </table>			* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<a href="#">View</a>	Performance Measures : 2018 : July - June : New Group : BCTA					Asset Category Facilities	Group Name New Group	Agency Status Pending Activation	<input type="button" value="Activate"/> <div style="background-color: orange; border-radius: 10px; padding: 5px; display: inline-block;">           Activate Button            </div>		Asset Class/Type Passenger	TERM 3	Editable/Locked <input checked="" type="checkbox"/>	Goal Pcnt 0	<input type="button" value="Editable"/>	Parking	3	<input checked="" type="checkbox"/>	0	<input type="button" value="Editable"/>
* Policy Year 2018	Period July - June	* Group Name New Group	* Organization BCTA-Beaver County Transit Authority	<a href="#">View</a>																							
Performance Measures : 2018 : July - June : New Group : BCTA																											
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Asset Class/Type Passenger	TERM 3	Editable/Locked <input checked="" type="checkbox"/>	Goal Pcnt 0	<input type="button" value="Editable"/>																							
Parking	3	<input checked="" type="checkbox"/>	0	<input type="button" value="Editable"/>																							



## 7.0 Projects

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

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

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

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

**Figure 106 Capital Projects Table**

### Capital Projects

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

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

**Figure 107 New Capital Project**

New Capital Project

\* Organization

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

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

\* Fiscal Year  
FY 18-19

\* Scope

\* Project Type  
Replacement

Emergency project  
 Multi year project

\* Description  
254 characters remaining

\* Justification  
254 characters remaining

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

**Figure 108 Capital Project Details**

Capital Planning Tool (QA) 1

Home > Capital Projects > AMTRAN 18-19 #6087

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

Project Number: AMTRAN 18-19 #6087	Fiscal Year: FY 18-19	Scope: 125	Total Cost: \$0
Type: Replace	SOGR: No	Shadow: No	Multi year: No
Emergency: No			

**Edit Capital Project Details**

**Capital Project Additional Details**

Project Locations: Senate District 30 (Senate)

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

**Figure 109 Add an ALI**

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

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

**Figure 110 Add an ALI Details**

The screenshot shows the Capital Planning Tool (QA) interface with a 'New Activity Line Item' dialog box overlaid. The dialog box has several input fields: 'Category' (dropdown), 'TEAM ALI Code' (dropdown), 'Cost Estimate' (\$ dropdown), 'Fiscal Year' (FY 18-19 dropdown), 'Replace with New' (radio buttons for Yes or No), 'Count' (dropdown), 'Fuel Type' (dropdown), 'Length' (dropdown), and 'Name' (text input). At the bottom are 'Create Activity Line Item' and 'Cancel' buttons. The background shows the same project details as Figure 109, including the '+ Add Line Item' button.

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



## 8.0 Project Planning

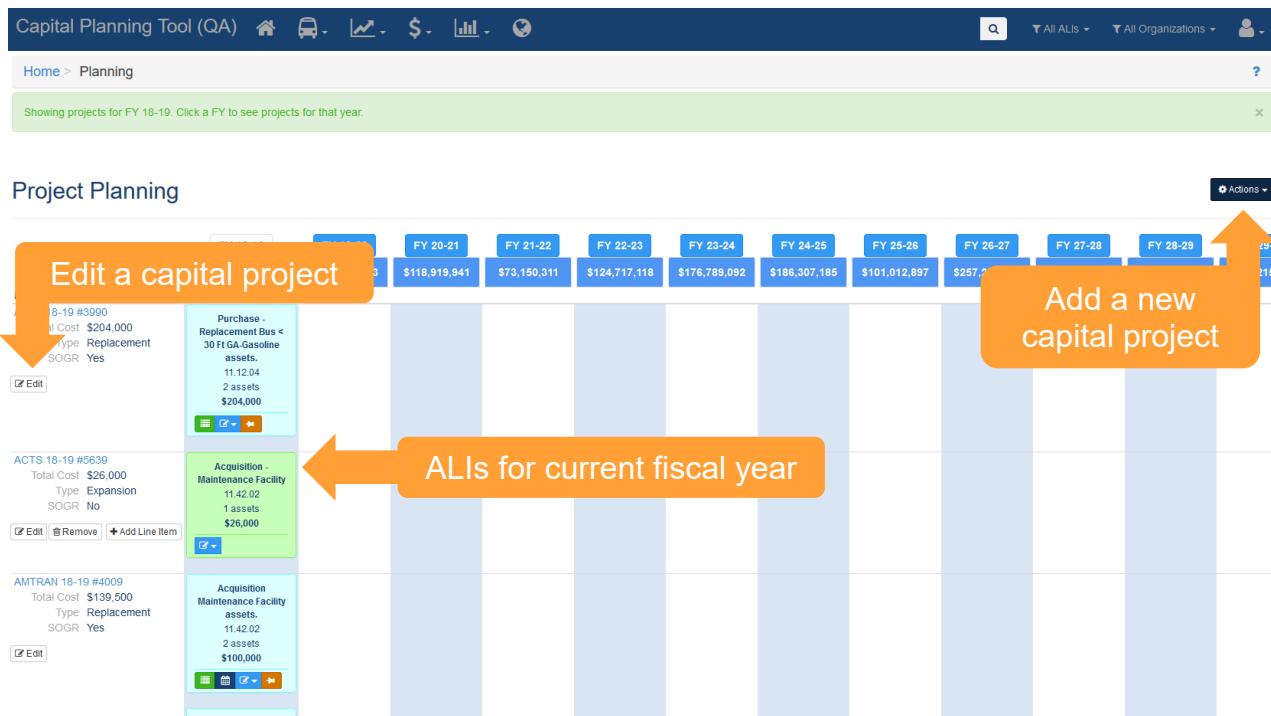
### 8.1 Project Planner

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

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

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

**Figure 111 Project Planner Interface**



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

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

## Figure 112 Edit Manually Created Capital Projects

The screenshot shows the TransAM Capital Planning Tool interface. At the top, there's a navigation bar with icons for Home, Planning, and various filters. Below it, a message says 'Showing projects for FY 18-19. Click a FY to see projects for that year.' The main area is titled 'Project Planning' and shows a grid of projects. Each project row has a summary table with columns for 'Project', 'FY 18-19', 'FY 19-20', etc. The 'FY 18-19' column for the first project contains the following data:

ACTS 18-19 #3990
Total Cost \$204,000
Type Replacement
SOGR Yes

Below this, a callout box with an orange arrow points to the 'FY 18-19' column of the second project, which is highlighted in light blue. The callout text reads: 'Remove a project or add an ALI'.

The second project row contains the following data:

ACTS 18-19 #3990
Total Cost \$204,000
Type Replacement
SOGR Yes

Below this, another callout box with an orange arrow points to the 'FY 18-19' column of the third project, which is highlighted in light green. The callout text reads: 'Edit ALI cost, milestones, view funding data, or remove an ALI'.

The third project row contains the following data:

AMTRAN 18-19 #4009
Total Cost \$139,500
Type Replacement
SOGR Yes

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

**Figure 113 Edit SOGR Capital Projects**

**Project**

**ACTS 18-19 #3990**

- Total Cost \$204,000
- Type Replacement
- SOGR Yes

**Maintenance Facility**

- 11.42.02
- 1 assets
- \$26,000

**AMTRAN 18-19 #4009**

- Total Cost \$139,500
- Type Replacement
- SOGR Yes

**Maintenance Facility**

- 11.42.02
- 2 assets
- \$100,000

**Edit SOGR project details**

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

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

**Figure 114 Prioritize Projects**  
*Move ALIs to Different Years*

Project	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30
ACTS 22-23 #6022	\$533,519,020	\$308,302,216	\$116,603,350	\$78,344,343	\$126,448,962	\$179,162,099	\$181,436,144	\$100,488,208	\$267,268,514	\$175,681,481	\$394,858,694	\$197,505,958
AMTRAN 22-23 #4019	Total Cost \$660,407	Type Replacement	SOGR Yes									
AMTRAN 22-23 #4026	Total Cost \$41,056	Type Replacement	SOGR Yes									

**Purchase - Replacement Bus < 30 Ft GA-Gasoline assets.**

- 11.42.04
- 9 assets
- \$660,407 (e)

**Acquisition Shop Equipment assets.**

- 11.42.06
- 3 assets
- \$7,387 (e)

**Acquisition ADP Software assets**

- 11.42.08
- 2 assets
- \$1,074 (e)

**Acquisition Miscellaneous Equipment assets.**

- 11.42.20
- 5 assets
- \$31,695 (e)

**Acquisition Surveillance/Security Systems assets**

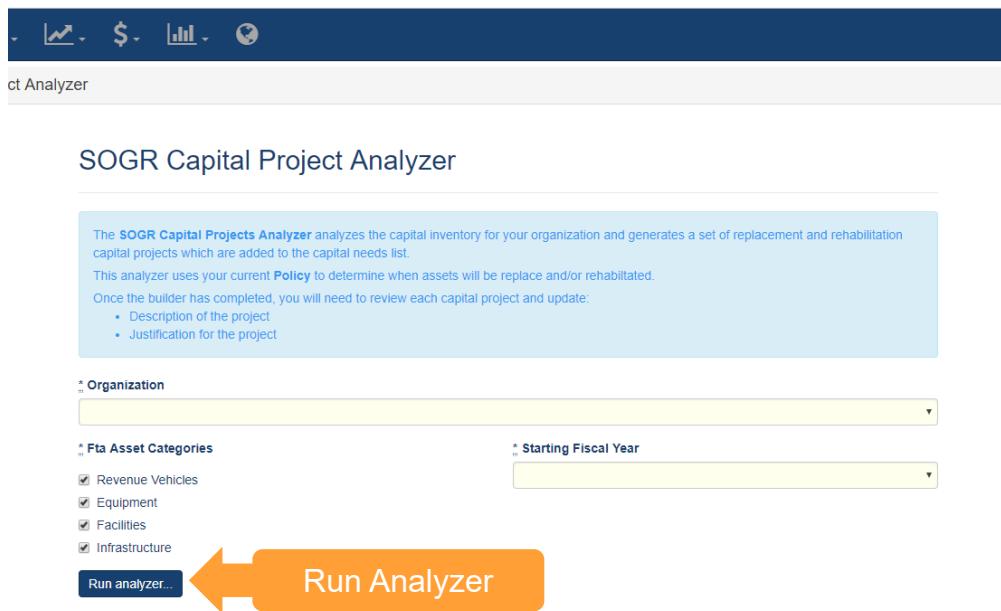
- 11.32.07
- 1 assets
- \$100 (e)

**Move to FY 26-27**

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

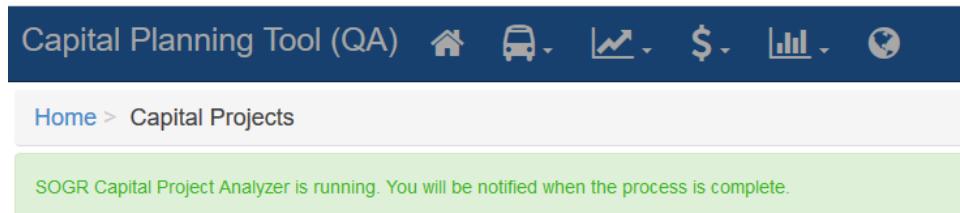
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates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

**Figure 115** Running SOGR Capital Project Analyzer



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

**Figure 116** SOGR Capital Project Analyzer Processing

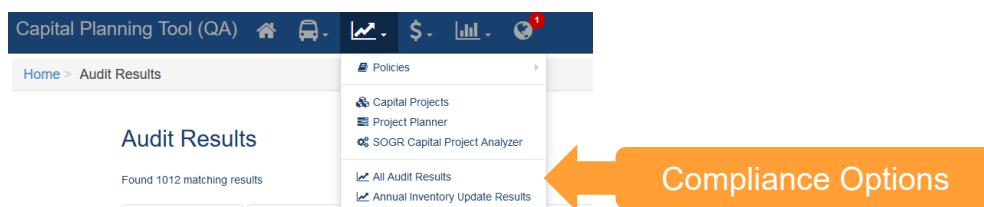


## 9.0 Compliance

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

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

**Figure 117 Compliance Options**



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

**Figure 118 Audit Results**

A screenshot of the Capital Planning Tool (QA) interface showing the "Audit Results" page. The top navigation bar includes icons for Home, Audit Results, Policies, Capital Projects, Project Planner, and SOGR Capital Project Analyzer. Below the navigation is a breadcrumb trail: Home > Audit Results. The main content area is titled "Audit Results" and shows a message: "Found 1012 matching results". At the top right, there are filter dropdowns for "Revenue Vehicles", "failed", "Annual Inventory Update", and a "Search" icon. Below the filters is a table with columns: Org, Audit, Asset Tag, Description, Result, and Updated At. An orange callout bubble with the text "Export Results" points to the first row of the table. Another orange callout bubble with the text "Filter Results" points to the filter dropdowns. A blue callout bubble with the text "Remember to check the appropriate boxes to export the rows you desire" points to the "Org" column header, where several checkboxes are checked.

Org	Audit	Asset Tag	Description	Result	Updated At
CCTA	Annual Inventory Update	Revenue Vehicles 105	GIL Low Floor	failed	03/30/2018
CATA*	Annual Inventory Update	Revenue Vehicles 305	CMD Express 3500	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 306	FRD E350	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 307	FRD E350	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 401	FRD E450	failed	03/30/2018
CTDC	Annual Inventory Update	Revenue Vehicles 402	FRD E450	failed	03/30/2018



# 10.0 Funding

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

## 10.1 Programs

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

**Figure 119 Available Funding Programs**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area is titled 'Home > Funding Programs > All'. On the left, there's a table listing various funding programs with columns for Name, Source, Type, and Status. To the right of the table is a sidebar with links for 'Programs', 'Federal', 'State', 'Local', 'Templates', 'Buckets', and a 'Pct Match' section. A prominent orange callout box labeled 'Available Funding Programs' points to the right side of the screen, where a list of programs is displayed. An orange arrow points upwards from the 'Add Funding Programs' button in the center to the 'Available Funding Programs' callout.

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

**Figure 120 Funding Program Details**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there's a navigation bar with icons for Home, Back, Forward, and various filters. Below the navigation is a search bar and dropdown menus for 'All ALs' and 'All Organizations'. The main content area is titled 'Home > Funding Programs > 5307'. On the left, there's a summary card for program '\$ 5307' with fields for Type (Federal), Formula (✓), Inflation Rate (0.000%), Pct Match (80.000%), and Life of \$ (years) (5). To the right, there's a 'Details' panel with tabs for 'Details', 'Templates' (2), 'Buckets' (21), 'Assets' (827), 'Documents' (0), and 'Comments' (0). An orange callout box labeled 'Additional Program Information' points to the right side of the screen, where a detailed view of the program is shown. An orange arrow points upwards from the 'Additional Program Information' callout to the 'Details' tab in the navigation bar.

## 10.2 Grants

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

**Figure 121 Grants Dropdown**

The screenshot shows the TransAM DRPT (Staging) application. At the top, there is a navigation bar with icons for Home, Asset Summary, Programs, and Grants. A large orange arrow points from the 'Grants' icon in the navigation bar down to a callout box labeled 'Grants Dropdown'. Below this, a table displays asset data categorized by organization (Org) and category/class. The columns include Org, Category : Class, Avg. Age, Count, and Cost. The data shows various assets like Revenue Vehicles, Equipment, and Facilities across different organizations such as RATS, CROSS, RRCSB, PCS, PAA, CVACL, WATA, STJOE, BESH, RAARC, GRAF, ARCPW, NARL, and NARI.

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

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

**Figure 122 Adding a Grant**

The screenshot shows the 'Grants' table in the TransAM DRPT (Staging) application. The table lists grants with columns for Grant Number, Source, Program, Grant Year, Owner, Contributor, Legislative Authorization, Date of Award, Date of Most Recent Amendment, Status, Last Update By, and Last Update Date. An orange arrow points from the 'Add a Grant' button at the bottom right of the table area up towards the table header. The 'Add a Grant' button is located in the top right corner of the table's data area.

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

**Add a Grant**

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

**Figure 123 Adding Required Details (New Grants)**

Home > Grants > New

Add Grant

Details

* Grant Number	
* Source	
* Program	
* Owner	* Contributor
Legislative Authorization	
* Date of Award 03/14/2019	
Method of Apportionment Structure Single Apportionment	
* Grant Year 2019	
* Total Apportionment \$ 0	
Grant Development Method Directly Generated	
<a href="#">+ Add Grant &amp; Go To Grant Details</a> <a href="#">Cancel</a>	

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

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

**Figure 124 Grants Table**

Home > Grants

Grants

Filtered

Status: In Development / Open

**Filter Viewable Grants**

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

**Export Grant Data**

[Export](#) [+ Add Grant](#)

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

**Figure 125 Accessing an Existing Grant**

Home > Grants

Grants

Filtered

Status: In Development / Open

**Access an Existing Grant**

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

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

## Figure 126 Editing or Updating an Existing Grant

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

Details

Actions Edit

Details		Apportionments	Assets	Amendments	History
<b>* Grant Number</b> VA-23-12-2013-01	<b>* Method of Apportionment Structure</b> Single Apportionment	<b>* Grant Year</b> 2019			
<b>* Source</b> Federal	<b>* Total Apportionment</b> \$ 1,100,540				
<b>* Program</b> 5311	<b>Grant Development Method</b> Directly Generated				
<b>* Owner</b> DRPT	<b>* Contributor</b> ADCM				
Legislative Authorization MAP-21					
<b>* Date of Award</b> 12/04/2018	<b>Date of Most Recent Amendment</b> 03/07/2019	<b>Date of Closeout</b> -			

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

## Figure 127 Managing the Lifecycle of a Grant

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

Details

Actions Close Edit

Details		Apportionments	Assets	Amendments	History
<b>* Grant Number</b> VA-23-12-2013-01	<b>* Method of Apportionment Structure</b> Single Apportionment	<b>* Grant Year</b> 2019			
<b>* Source</b> Federal	<b>* Total Apportionment</b> \$ 1,100,540				
<b>* Program</b> 5311	<b>Grant Development Method</b> Directly Generated				
<b>* Owner</b> DRPT	<b>* Contributor</b> ADCM				
Legislative Authorization MAP-21					
<b>* Date of Award</b> 12/04/2018	<b>Date of Most Recent Amendment</b> 03/07/2019	<b>Date of Closeout</b> -			

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

## Figure 128 Managing Grant Amendments

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

The screenshot shows a software interface for managing grant amendments. At the top, there's a header with the text 'Grant Profile' and 'VA-23-12-2013-01 : Federal : 5311 : Open'. Below this is a navigation bar with tabs: 'Details', 'Apportionments', 'Assets', 'Amendments' (which is the active tab), and 'History'. To the right of the tabs is an 'Edit' button. The main content area is titled 'Amendments' and contains a table with one row. The table has columns for 'Amendment Number' (01), 'Grant Number' (VA-23-12-2013-01), 'Comments' (Amendment for project scope changes), 'Created By' (Lydia Chang), and 'Created Date & Time' (03/07/2019 01:18 PM). There are also 'Actions' buttons. An orange arrow points from the left towards the '+Add Amendment' button, which is highlighted in blue.

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

## Figure 129 Adding Required Details (Grant Amendments)

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

Add Amendment

<b>* Amendment Number</b>	
<b>* Update Grant Number</b>	
<input checked="" type="radio"/> Yes	
<input type="radio"/> No	
<b>* Grant Number</b>	
VA-23-12-2013-01	
Comments	
<input type="button" value="+ Add Amendment"/> <input type="button" value="Cancel"/>	



## 11.0 Reports

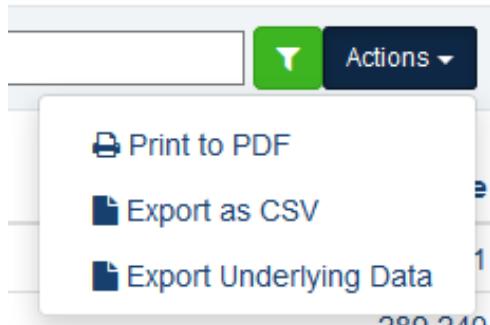
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

**Figure 130 Reports Dropdown**

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there are several icons: a house, a bus, a chart, a dollar sign, and a bar chart. Below these are tabs for 'Home' and 'Asset Summary'. The 'Asset Summary' tab is active, displaying a table with columns: Type, Avg. Age, Count, Cost, and Book. Data rows include ACTS Revenue Vehicles, ACTS Support Facilities, and AMTRAN Revenue Vehicles. To the right of the table is a 'Reports' dropdown menu with options: Reports, Capital Needs Reports, System Reports, Planning Reports, and NTD Reporting. An orange arrow points from the text 'Reports Dropdown' to this menu. Below the table is a section titled 'IS' with sub-sections 'Num. Projects' and 'Cost', showing values for AMTRAN and ATA.

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 131 Report Exports**

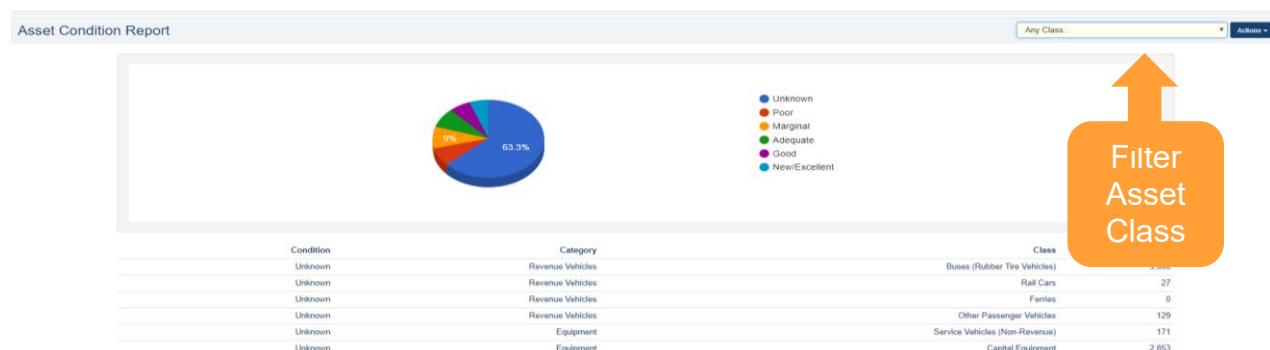


### 11.1 Inventory Reports

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

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

**Figure 132 Asset Condition Report**



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

**Figure 133 Asset Age Report**



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

- Agency, Funding Program.
- Agency, Funding Program, Year of Purchase.
- Funding Program, Agency.
- Funding Program, Agency, Year of Purchase.
- Funding Program, Year of Purchase.
- Funding Program, Year of Purchase, Agency.
- Year of Purchase, Funding Program.
- Year of Purchase, Funding Program, Agency.

**Figure 134 Asset Funding Source Report**



## 11.2 Capital Needs Reports

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

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

**Figure 135 Backlog Report**



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

**Figure 136 Unconstrained Capital Projects Report**



## 11.3 System Reports

System reports keep track of system-related functional metrics.

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

## Figure 137 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 "Ooops... there was an error" screen* but I'm not sure what Dana got) Shortly after I got off the phone with Dana I logged in to production and I was able to download the template. However, I haven't been able to get a hold of Dana since our discussion on Wednesday to see if it worked for her. I will keep trying to reach out to her to see if it she is able to download the template and do the mass upload thereafter.	Google Chrome	Patrick	Sosik	9,999,999,999.00	Open	
BPT	Bug	2015-06-19 11:42:17 UTC	Jeff Glisson of SCTA is attempting to add assets and getting the "Ooops Error 500 Application Error" From Jeff. "Yesterday and today for a couple of times, I have been unable to use the CPT to add the information on the two minivans. I logged in... clicked on Add Assets under inventory... clicked on Van Asset Type... clicked on Create New Asset... and received the attached error message.*	Microsoft IE 11	Kyle	Eckert	717-772-5614	Open	

## 11.4 Planning Reports

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

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

## Figure 138 Revenue Vehicle Replacement Report

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

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

**Figure 139 State of Good Repair Report**

State of Good Repair Report					
				Jump to...	Actions ▾
State of Good Repair: All Transit Agencies					
Category	Class	Sub Type	Count	Book Value	Replacement Cost
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Articulated	11	\$6,197,520	\$8,414,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	438	\$138,243,902	\$189,321,201
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	27	\$416,191	\$1,476,958
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	161	\$67,597,460	\$92,477,734
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	623	\$208,254,531	\$285,018,765
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	736	\$53,347,885	\$217,175,923
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	154	\$35,377,187	\$55,183,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1,204	\$36,625,492	\$31,357,436
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Trolley Std	31	\$8,585,473	\$12,003,406
Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	100	\$167,850,515	\$36,271,696
Revenue Vehicles	Rail Cars	Light Rail Car	9	\$25,638,417	\$3,887,370
Revenue Vehicles	Rail Cars	Commuter Locomotive Diesel	20	\$74,188,285	\$65,980,817
Equipment	Service Vehicles (Non-Revenue)	Pickup Utility Truck	75	\$436,717	\$2,616,326
Equipment	Service Vehicles (Non-Revenue)	Sports Utility Vehicle	85	\$693,546	\$2,303,917
Equipment	Service Vehicles (Non-Revenue)	Van	79	\$729,509	\$2,272,877
Equipment	Service Vehicles (Non-Revenue)	Sedan/Station Wagon	62	\$437,762	\$1,546,568
Equipment	Service Vehicles (Non-Revenue)	Other Support Vehicle	31	\$212,606	\$1,610,645
Equipment	Service Vehicles (Non-Revenue)	Tow Truck	2	\$0	\$344,361
Equipment	Capital Equipment	Bus Maintenance Equipment	1,033	\$7,860,493	\$11,976,480
Equipment	Capital Equipment	Other Maintenance Equipment	140	\$11,904,184	\$16,743,863
Equipment	Capital Equipment	Rail Maintenance Equipment	2	\$73,195	\$1,180,195
Equipment	Capital Equipment	Other Facilities Equipment	416	\$3,164,904	\$5,017,581

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

**Figure 140 Disposition Report**

Disposition Report					
				Jump to...	Actions ▾
All Transit Operators					
Fiscal Year	Category	Class	Sub Type	Count	Book Value
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	9	\$3138,463
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	1	\$265,314
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	3	\$679,554
FY 18-19	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Van	1	\$29,493
FY 18-19	Equipment	Capital Equipment	Other Facilities Equipment	2	\$143
FY 18-19	Equipment	Capital Equipment	Other Communications Equipment	1	\$0
Totals for FY 18-19				17	\$4,112,957
					\$6,310,180

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

**Figure 141 Asset Service Life Summary Report**

Capital Planning Tool (QA)					
Home > Reports > Asset Service Life Summary Report					
Asset Service Life Summary Report					
Organization	Subtype	Quantity	# Past ESL (Mo.) Pct	# Past ESL (Mi.) Pct	# Past TERM Thresh Pct
All (Filtered) Organizations	Bus < 30 FT	123	55 45%	29 24%	63%
All (Filtered) Organizations	Bus 30 FT	9	6 67%	9 100%	
All (Filtered) Organizations	Bus Commuter/Suburban	14	0 0%	0 0%	

Filter or Export

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

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

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

**Figure 142 TAM Service Life Summary Report**

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

Home > Reports > TAM Service Life Summary Report

TAM Service Life Summary Report

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

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

Filter or Export

## 12.0 Specialized Reports

### 12.1 Asset Fleet Builder

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

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

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

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

**Figure 143 Asset Fleet Builder**

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

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**

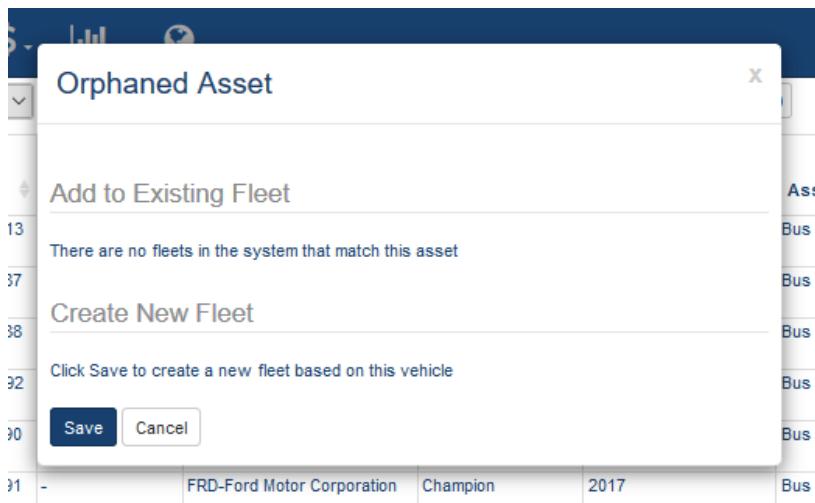
**Build Support Vehicles Fleets**

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

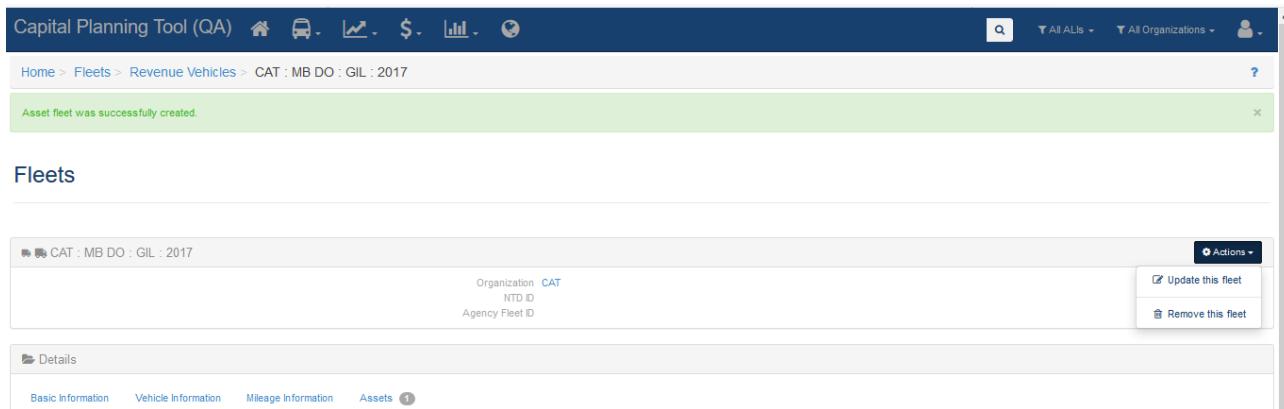
**Figure 144 Asset Fleet Builder—Orphaned Assets**

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

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

**Figure 145 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 146 Adding a New Fleet****Figure 147 Update Asset Fleet Details**

### Update Asset Fleet

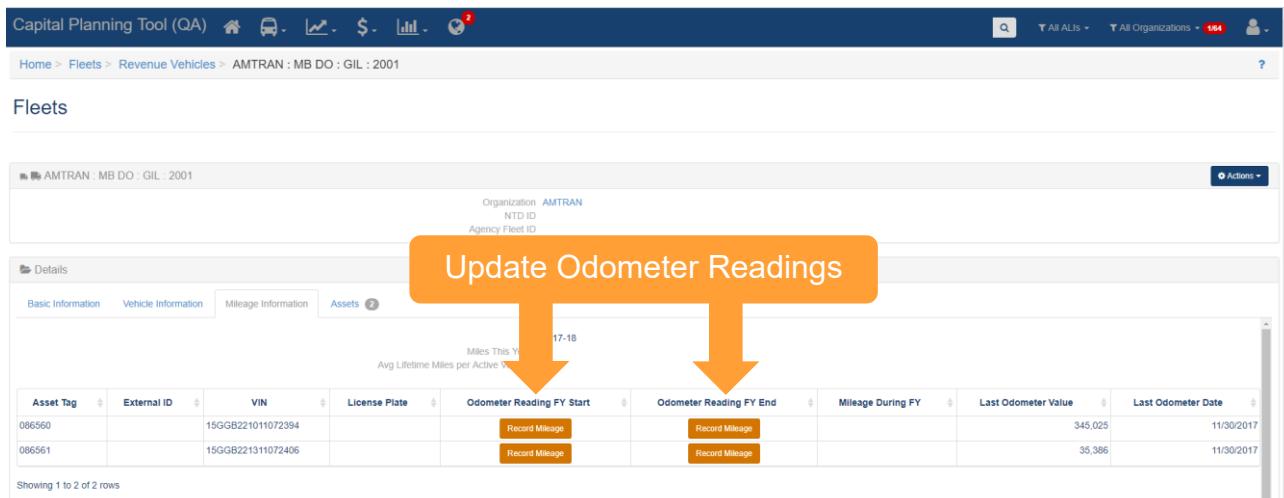
#### NTD ID

0

#### Agency Fleet ID

#### NTD Notes

Notes will appear in generated NTD report.

**Update Asset fleet****Cancel****Figure 148 Update Odometer Readings**

**Figure 149 Remove or Add Assets from within a Fleet**

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

Asset Tag	External ID	VIN	License Plate	Title Number	Status	Emergency Contingency	ADA Accessibility	ULB	Mileage	Valid in Fleet	Action
086561	15GGB221311072406				In Service	No	No		35386	Yes	
086560	15GGB221011072394				In Service	No	No		345026	Yes	

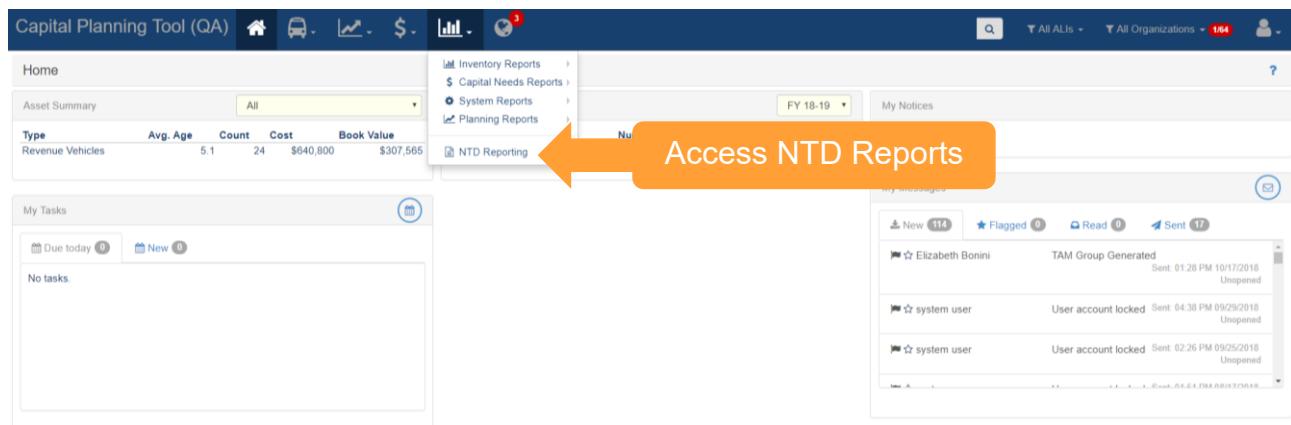
## 12.2 NTD Asset Reports

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

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

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

**Figure 150 Access NTD Reports**



Any NTD reports that have been previously generated can be viewed on the initial report table available when clicking on the NTD Reports module. Existing report data can be accessed by clicking on the row for an individual organization upon which point it can be downloaded, submitted for review, have comments added, updated, or removed. New reports can be generated by clicking on the New NTD Form button.

**Figure 151 Table of Previously Generated NTD Reports**

The screenshot shows the 'NTD Reporting' module. At the top, there's a header with 'Home > Forms > NTD Reporting'. Below the header is a search bar and a date selector set to 'FY 16-17'. A table follows, with columns: Organization, Fiscal Year, Status, Created At, and Creator. One row is visible, showing 'CARBON' as the organization, 'FY 16-17' as the fiscal year, 'Unsubmitted' as the status, '10:41 AM 10/19/2018' as the created at time, and 'Elizabeth Bonini' as the creator. Two orange callout bubbles with arrows point to the 'New NTD Form' button (left) and the table rows (right).

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 152 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** (Orange arrow points here)

**Figure 153 NTD Report Details and Data**

CARBON FY 16-17

**Actions:**

- submit this form
- New version
- Remove

Reporter Name: Elizabeth Bonini

**Details:**

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

Submit, Create a New Version, or Remove

Access Forms or Add a Comment

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

**Figure 154 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**

## 13.0 Admin Tools

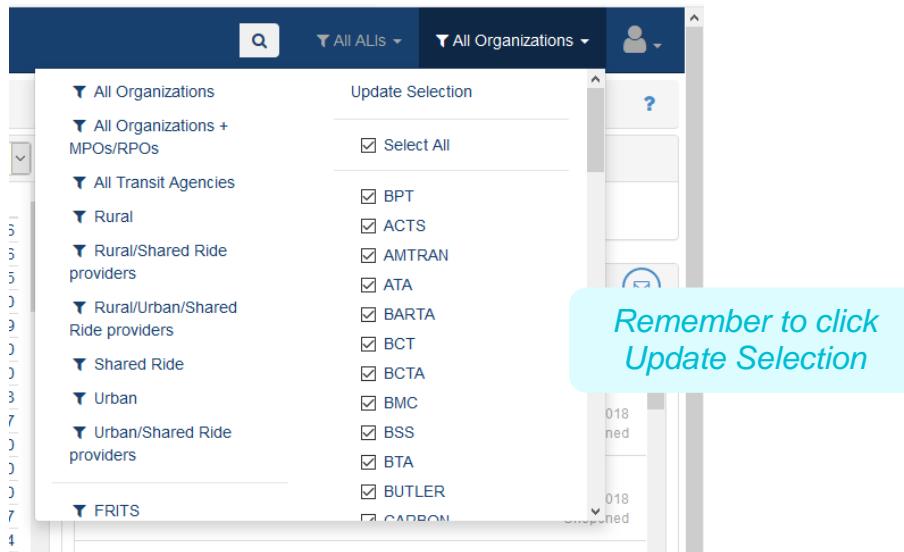
As an administrator, you have access to additional functionality within the User and Organization options at the top right of the screen.

**Figure 155 Admin User and Organization Options**

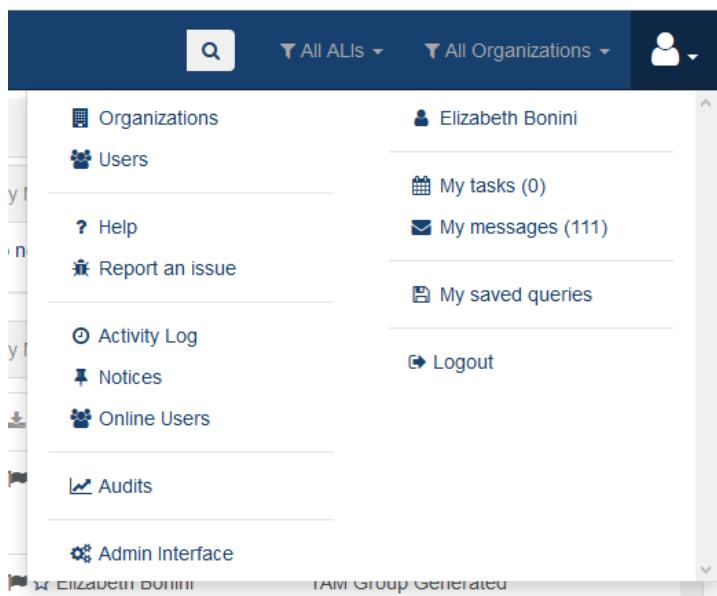


Clicking “All Organizations” provides a filter to pare down the different agencies you see. This also greatly reduces the time it takes to process certain content-rich pages.

**Figure 156 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 157 Admin User Options**

## 13.1 Organizations

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

**Figure 158 Admin Organizations**

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
		s, 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 159 Add an Organization**

## 13.2 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 160 Admin Users**

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 161 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
- BARTA-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

Choose All >

Selected:

Roles & Privileges

\* User Role: [dropdown]

User Privileges:

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

User Details

\* First Name: [text input]

\* Last Name: [text input]

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

### 13.3 Notices

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

**Figure 162 Notices**

Capital Planning Tool (QA)

Home > Notices

+ Add a notice

Type	Subject	Summary	Visible	Start Display	Display Until	Actions
System Notice	Welcome to the Capital Planning Tool.	IMPORTANT NOTICE!		01:00 PM 06/02/2015	11:59 PM 06/02/2015	
System Notice	System Maintenance	System Maintenance Monday July 6th		01:00 PM 07/02/2015	11:59 PM 07/02/2015	
System Notice	IMPORTANT NOTICE!	Asset Loading		07:00 AM 12/07/2015	11:00 PM 12/14/2015	
System Notice	System Maintenance	System Maintenance		10:00 AM 02/26/2016	11:00 PM 02/29/2016	
System Notice	SYSTEM NOTICE	System Outage - 9/10/16-9/12/16		10:00 AM 09/09/2016	11:59 PM 09/09/2016	
Informational Notice	2017 AUDIT PERIOD	2017 Revenue Vehicle Audit		02:00 PM 01/04/2017	11:59 PM 01/04/2017	
System Notice	SYSTEM NOTICE	System Outage - 2/10/17-2/13/17		02:00 PM 02/10/2017	08:00 AM 02/13/2017	
System Notice	SYSTEM OUTAGE	System Outage - 7/21 to 7/24		02:00 PM 07/19/2017	08:00 AM 07/24/2017	
System Notice	SYSTEM OUTAGE	System Outage - 11/17 to 11/20		08:00 AM 11/14/2017	07:00 AM 11/21/2017	
System Notice	SYSTEM OUTAGE	SYSTEM OUTAGE 11/30 5PM-6PM		03:00 PM 11/30/2017	11:00 PM 11/30/2017	
System Notice	SYSTEM OUTAGE	System Outage - 12/29-1/2		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 163 Add a Notice**

New Notice

\* Subject

\* Summary

Details

Organization

All

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

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

\* Notice Type

System Notice

**Create Notice**

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

**Figure 164 Notice on the Dashboard**

9

536  
786  
775  
280

My Notices

⚠ test  
test

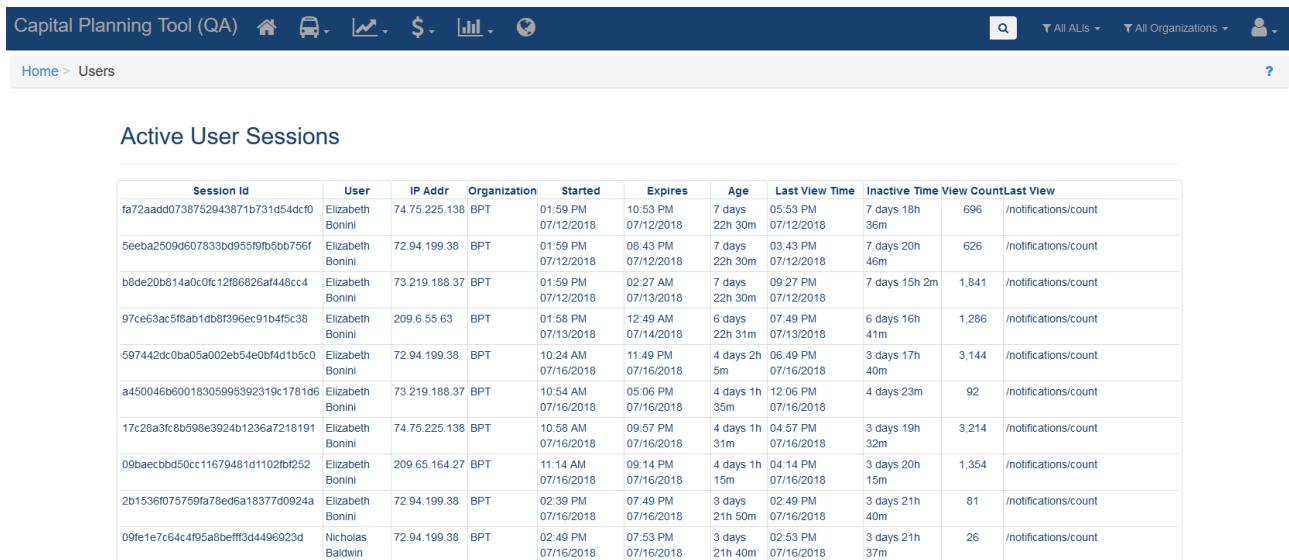
12:00 AM 07/20/2018

Details...

My Messages

## 13.4 Online Users

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

**Figure 165 Active Users**


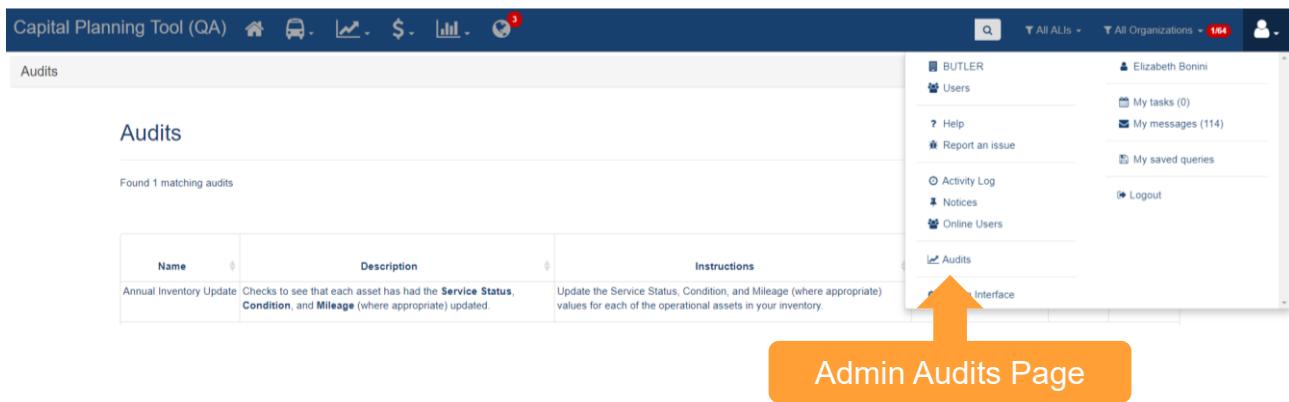
The screenshot shows a table titled "Active User Sessions" with the following columns: Session Id, User, IP Addr, Organization, Started, Expires, Age, Last View Time, Inactive Time, View Count, and Last View. The data includes sessions for various users like Elizabeth Bonini and Nicholas Baldwin, with details such as session start and end times, user activity duration, and the number of views.

Session Id	User	IP Addr	Organization	Started	Expires	Age	Last View Time	Inactive Time	View Count	Last View
fa72aadd0738752943871b731d54dcf0	Elizabeth Bonini	74.75.225.138 BPT		01:59 PM 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		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
b8de20b814a0c0fc12f86826af448cc4	Elizabeth Bonini	73.219.188.37 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		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		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		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		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
09baecbbd50cc11679481d1102fb252	Elizabeth Bonini	209.65.164.27 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		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		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

## 13.5 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 166 Admin Audits Page**


The screenshot shows a table titled "Audits" with the following columns: Name, Description, and Instructions. There is one entry: "Annual Inventory Update" which checks for Service Status, Condition, and Mileage updates. A callout arrow points to the "Audits" link in the sidebar menu, which is highlighted in orange.

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

Admin Audits Page

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 167 Admin Audits Details Page**

## 13.6 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 168 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 y		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
Maintenance types		4
Milestone types		
Notice types		
Priority types		
Location reference typ		