

TransAM

General User

User Guide

prepared for

Orange County Department of Planning (OCDP)

prepared by

Cambridge Systematics, Inc.

user guide

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date

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1.0 Welcome!

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

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

1.1 Initial Log In and Password Reset

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

Figure 1 Password Reset Request Screen

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

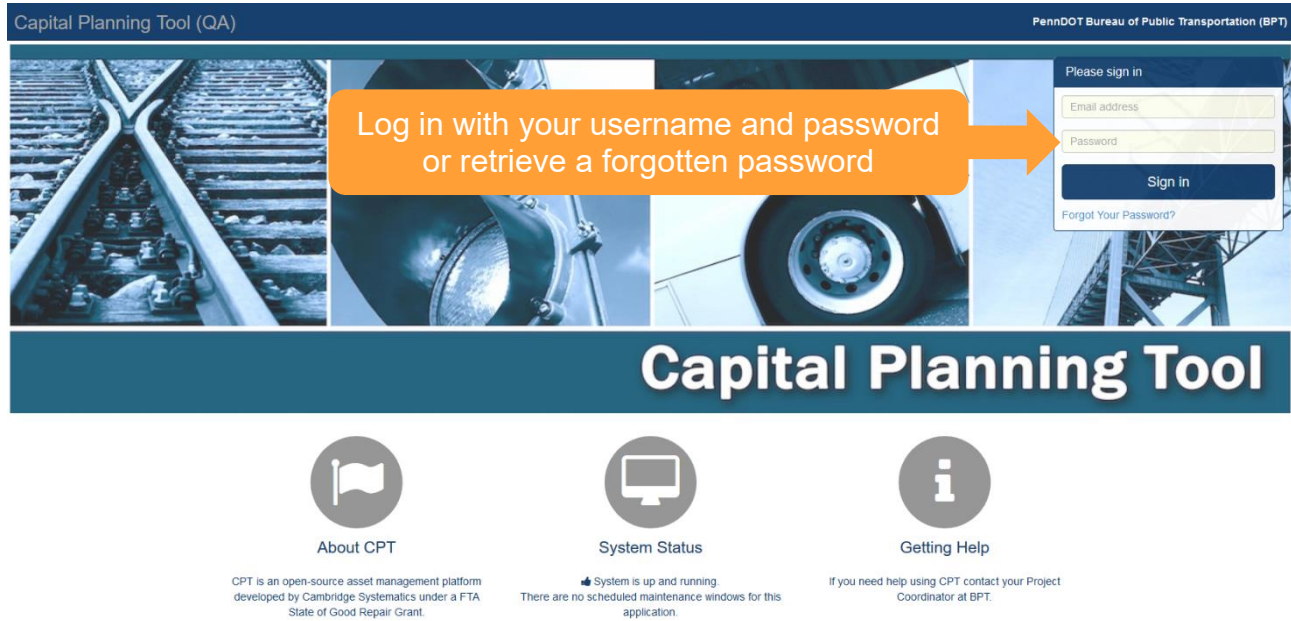
Figure 2 Set/Reset Password Screen

1.2 Ongoing Site Access

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

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

Figure 3 Login Screen



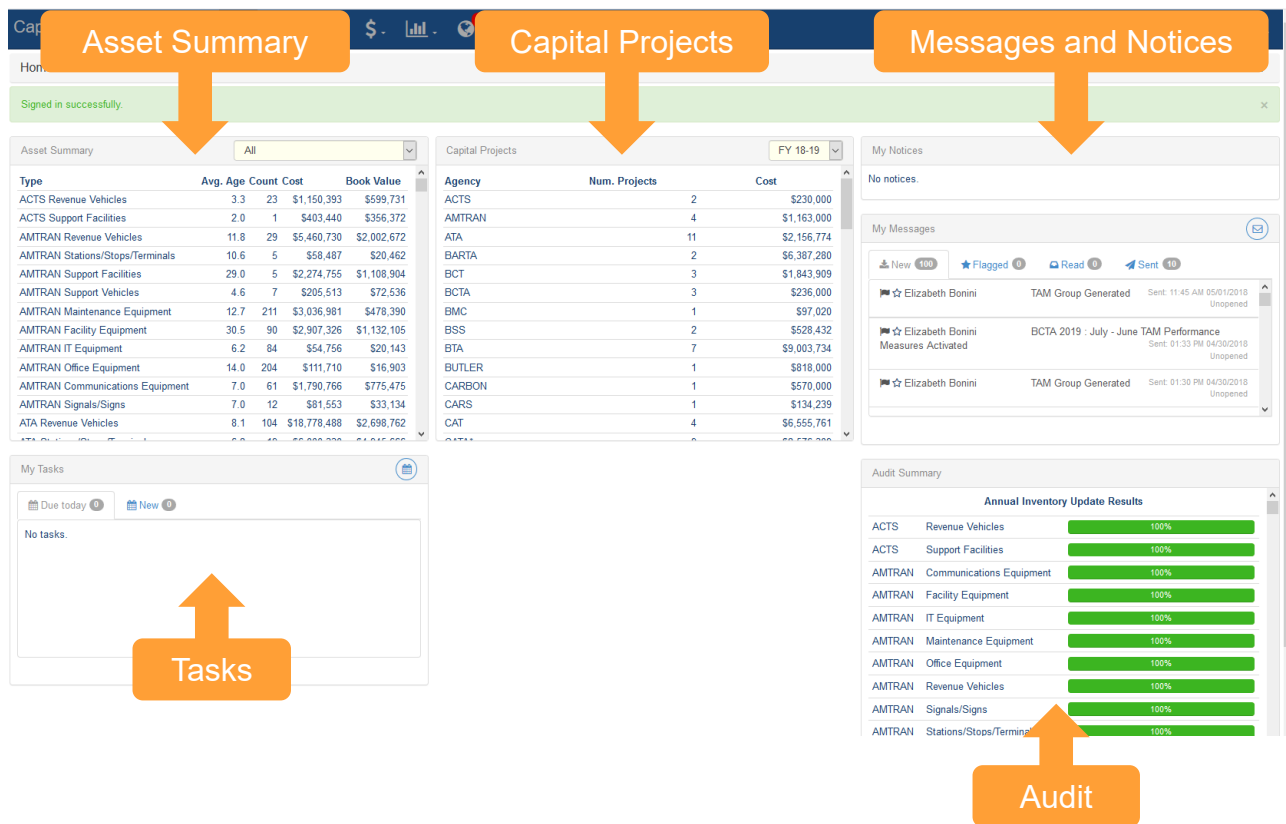
2.0 Dashboard

2.1 Dashboard Elements

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

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

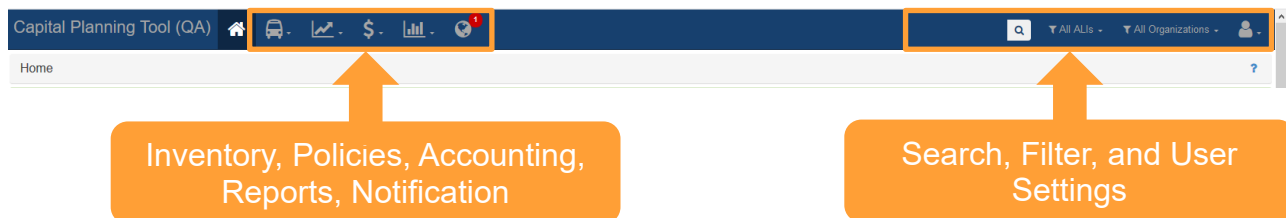
Figure 4 Dashboard Elements



2.2 Header Menu and Controls

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

Figure 5 Header Menu



3.0 General Features and Tools

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

3.1 Table Controls

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

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

Figure 6 **Sorting Controls**



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

Figure 7 **Export Button**



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

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

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

Figure 8 **Table Tools**



3.2 Site Filters

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

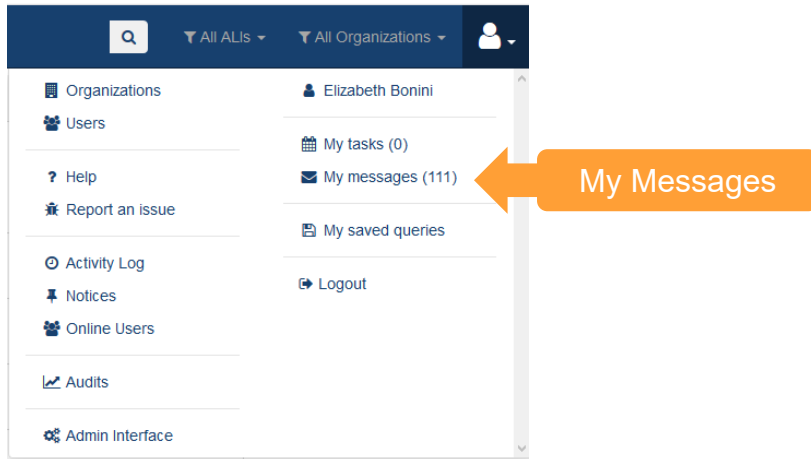
Figure 9 **Filter Icon**



3.3 Messages

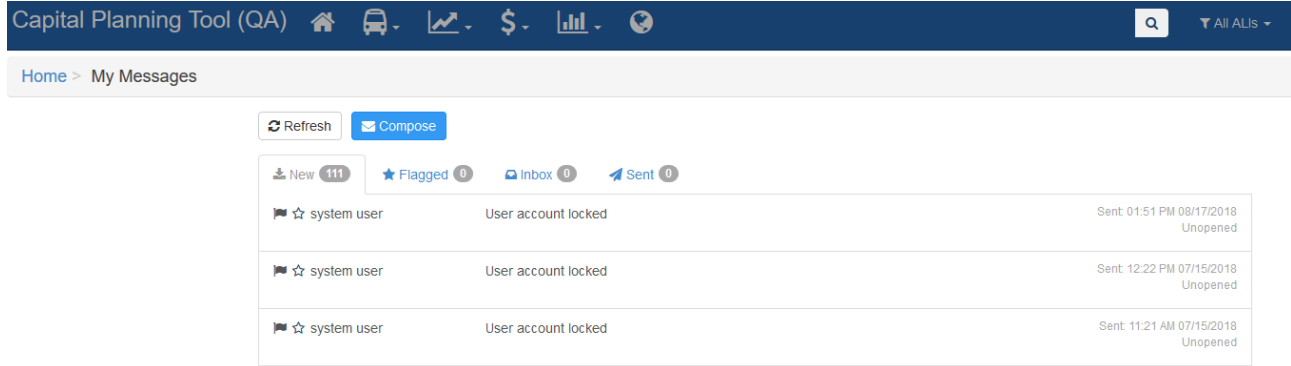
You can access Messages through the User Profile drop down menu.

Figure 10 User Profile
Messages



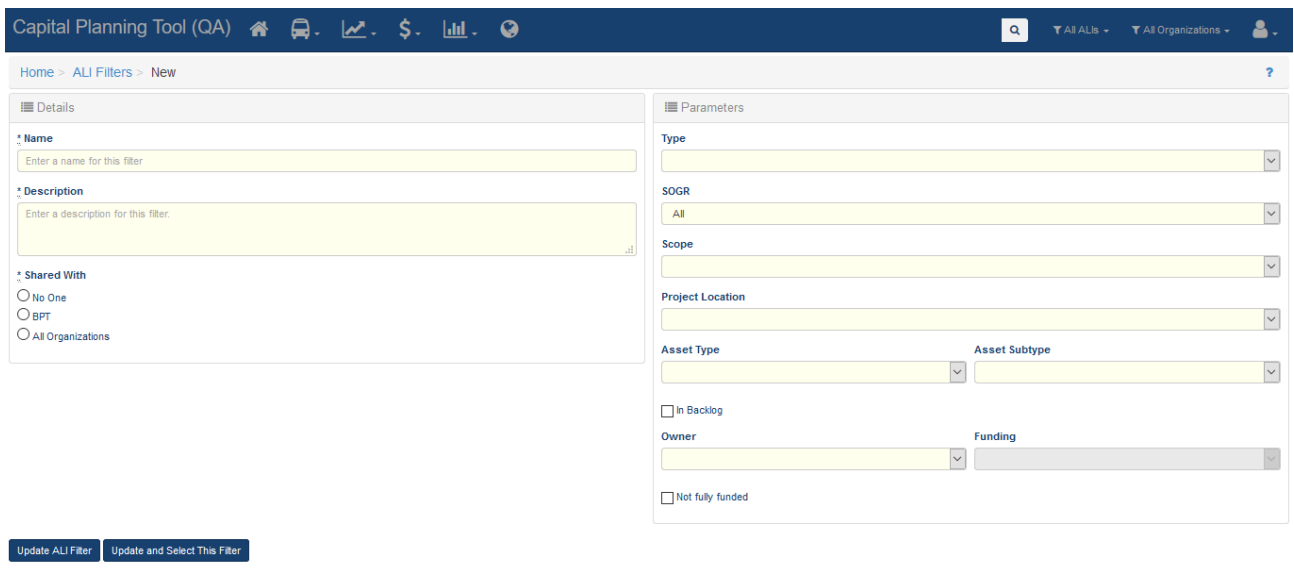
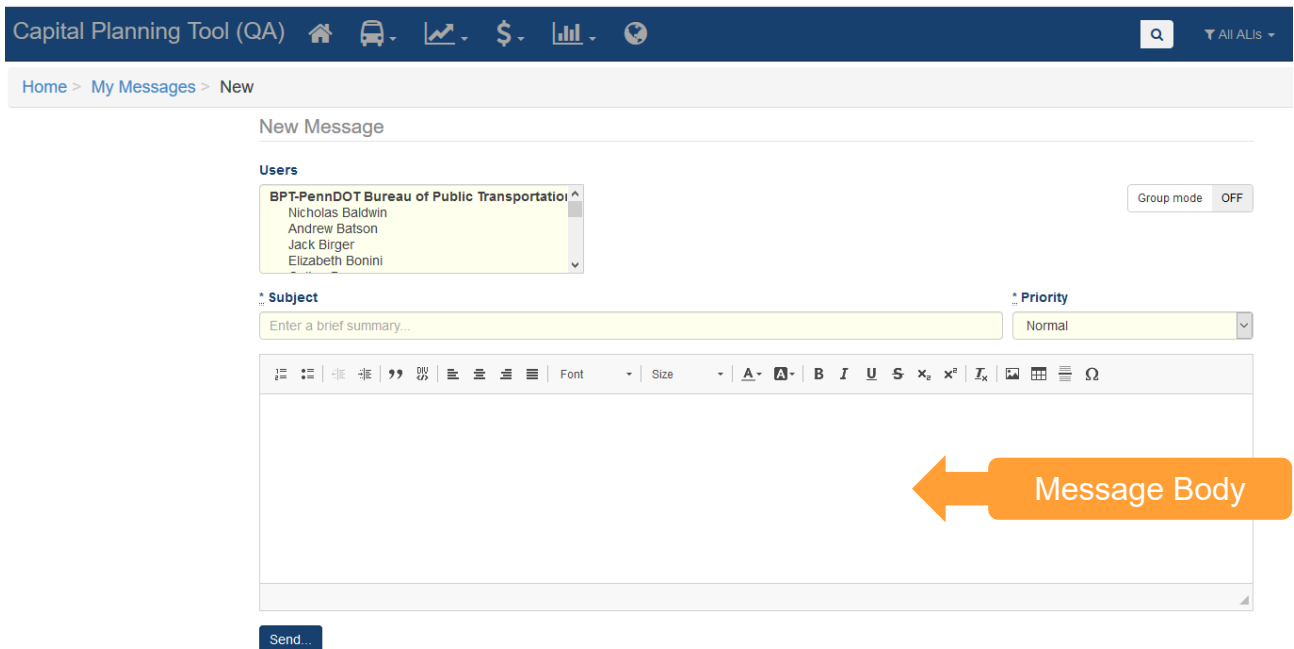
Users are able to send and receive messages to one or more users through the interface.

Figure 11 Messages



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

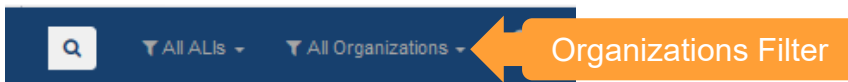
Figure 12 Message Interface



3.4 Organizations Filter

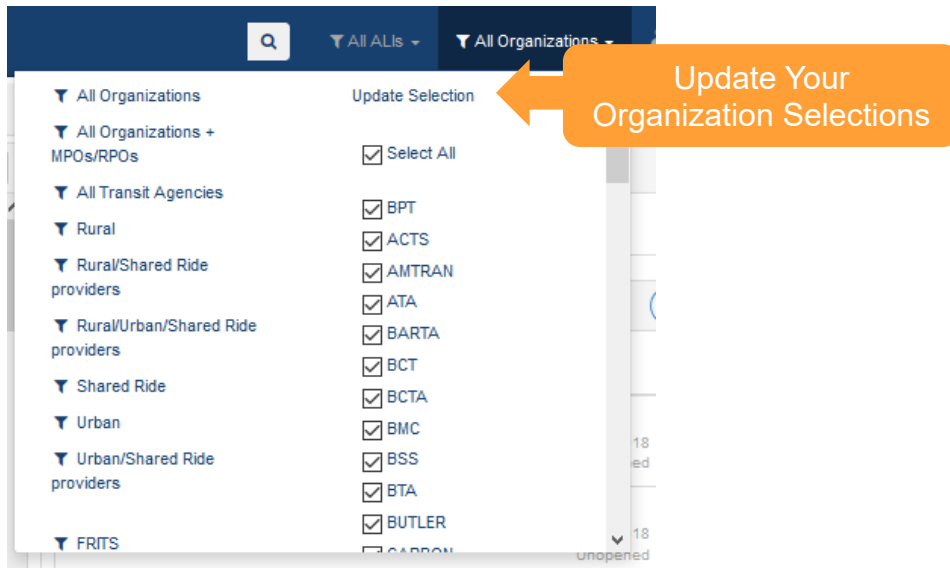
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

Figure 13 Organization Filter



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

Figure 14 Organization Filter Selections



3.5 Search

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

Figure 15 Search Box



3.6 User and Organization Options

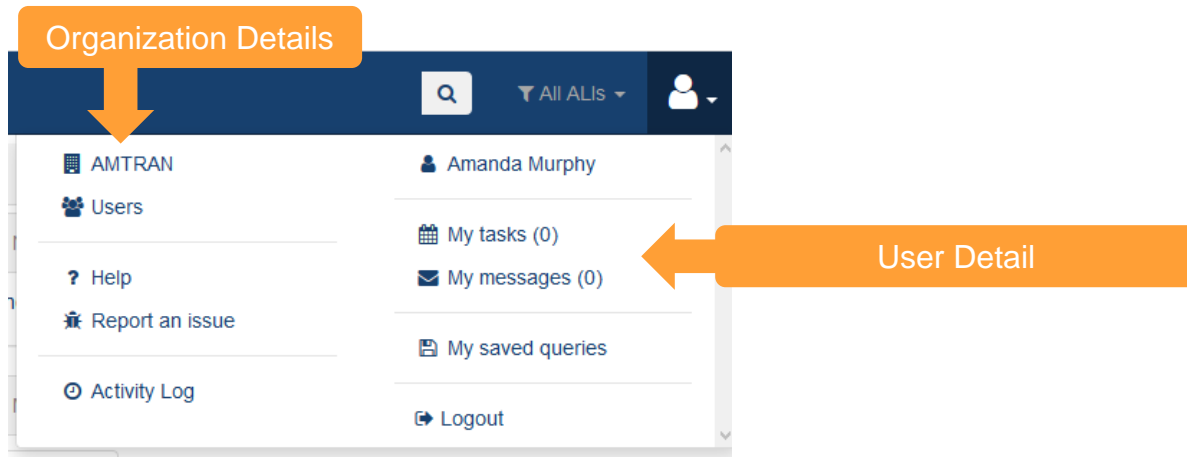
Each user has a menu with personal, organizational, and heads-up information at the top right of the screen.

Figure 16 User Menu



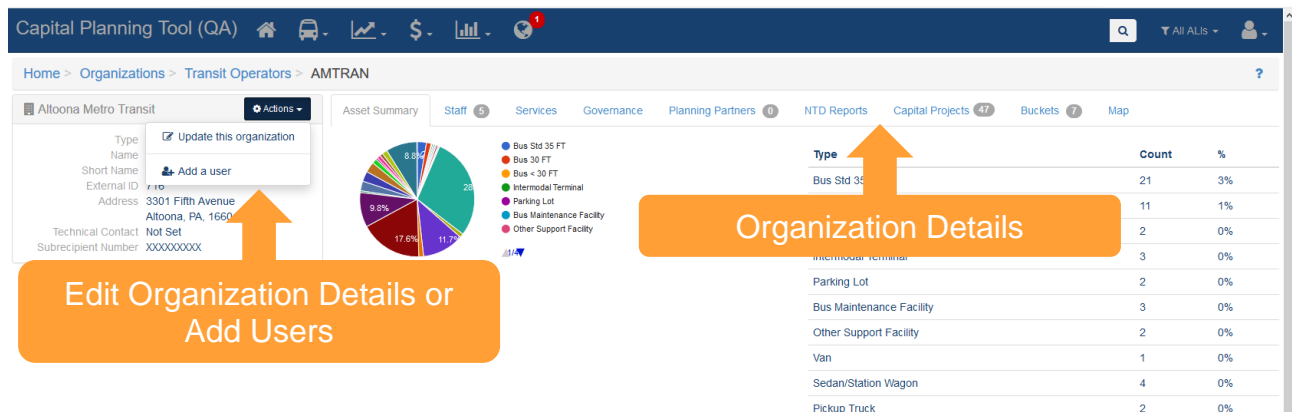
From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

Figure 17 User Menu Dropdown



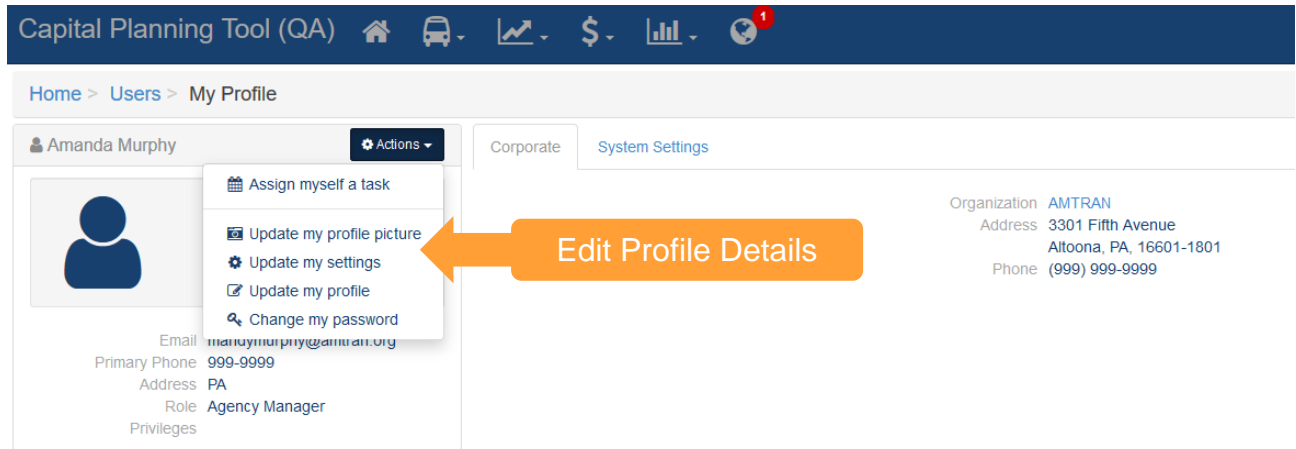
Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

Figure 18 Organization Details



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

Figure 19 Profile Details



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

Figure 20 Report an Issue

Report an Issue

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

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

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

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

* Issue Type

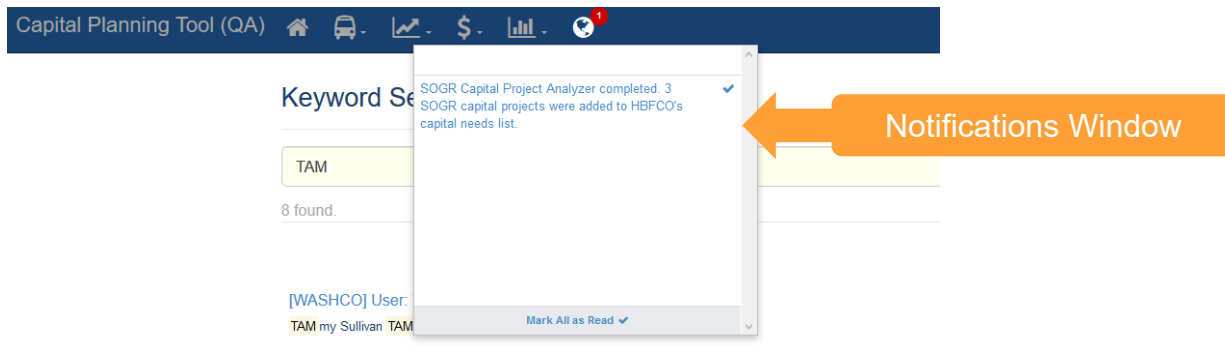
* Web Browser Type

* Comments
Please provide as much detail as you can...

Create Issue

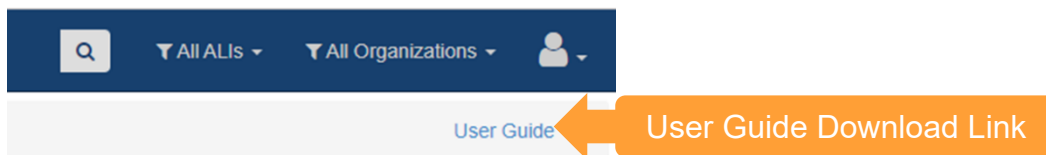
3.7 Notifications

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

Figure 21 Notification Drawer

3.8 Help

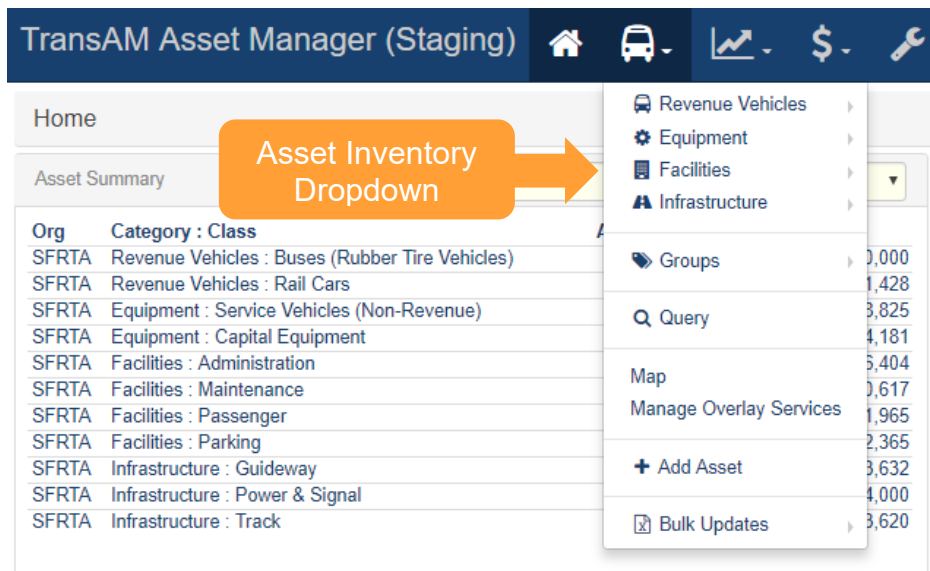
At the top right of each page is a 'User Guide' link. Clicking the user guide icon will automatically download the user guide in .pdf format.

Figure 22 User Guide

4.0 Asset Inventory

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

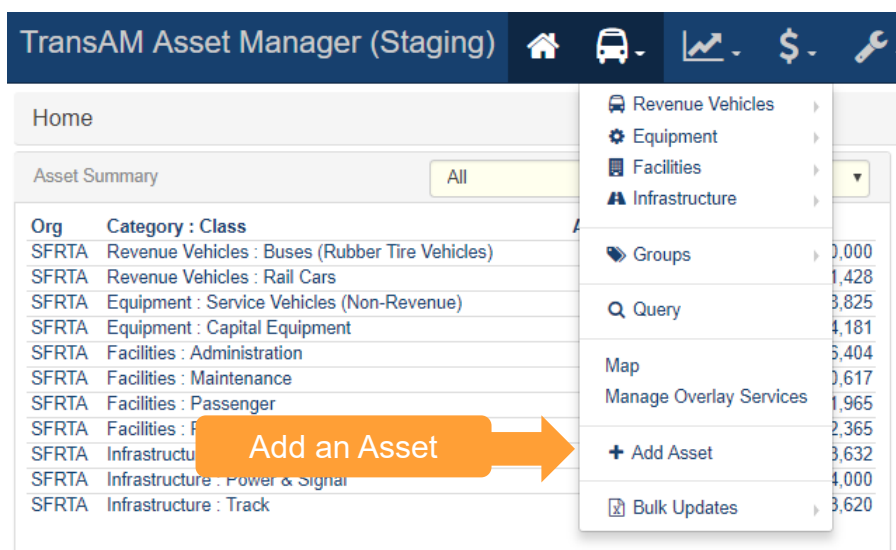
Figure 23 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 24 Adding an Asset



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

Figure 25 Select the Organization and Asset Class

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

Figure 26 Adding Asset Required Details

Figure 27 Add the Asset and Go To The New Record

The screenshot displays the 'Capital Planning Tool (QA)' interface. The form is organized into several sections:

- Funding:** Includes fields for Cost (Purchase), Funding Type, Direct Capital Responsibility (Yes/No), Percent Capital Responsibility, and Ownership Type.
- Procurement & Purchase:** Includes fields for Purchased New (Yes/No) and Purchase Date.
- Operations:** Includes fields for Seating Capacity (ambulatory), Standing Capacity, ADA Accessible (Yes/No), In Service Date, Primary Mode, Service Type (Primary Mode), and Dedicated Asset (Yes/No).

A blue button at the bottom left is labeled '+ Add Asset & Go to New Record'. An orange callout box with a white arrow points to this button, containing the text 'Add Asset and Go To New Record Button'.

4.2 Accessing Existing Assets

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

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

Figure 28 Existing Assets

Type	Avg. Age	Value	Agency	Num. Projects
ACTS Revenue Vehicles	2.3		ACTS	
ACTS Support Facilities	2.0		AMTRAN	
ACTS Guideway	0.0		ATA	
ACTS Power & Signal	0.0		BARTA	
ACTS Track	0.0		BCT	
AMTRAN Revenue Vehicles	12.0		BCTA	
AMTRAN Stations/Stops/Terminals	11.0		BMC	
AMTRAN Support Facilities	29.4		BSS	
AMTRAN Support Vehicles	4.9		BTA	
AMTRAN Maintenance Equipment	12.9		BUTLER	
AMTRAN Facility Equipment	30.2		CARBON	
AMTRAN IT Equipment	6.6		CARS	
AMTRAN Office Equipment	14.1	206 \$112,098 \$17,292	CAT	
AMTRAN Communications Equipment	7.5	61 \$1,790,766 \$775,479	CATA*	
AMTRAN Signals/Signs	6.8	13 \$82,918 \$34,504	CCTA	
AMTRAN Guideway	0.0	1 \$0 \$0	CHESSR	
AMTRAN Power & Signal	0.0	1 \$0 \$0	CLARCO	
AMTRAN Track	0.0	1 \$0 \$0	CNTPCO	

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

Figure 29 Existing Asset Interface

Asset ID	Organization	VIN	Manufacturer	Model	Year	Class	Type	Subtype	Status	ESL	Last Life Cycle Action	Life Cycle Action Date
#1701	CAT	15GGB2713H3189913	GIL - Gilling Corporation	35' Low Floor	2017	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Service status	2/26/2018
#271	CAT	1FDFE4F58HDC18987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4F58HDC18988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4F58HDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4F58HDC18990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4F58HDC18991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4F58HDC18989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4F58HDC18993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4F58HDC18994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4F58HDC18995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4F58HDC18996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFE4F58HDC18997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFE4F58HDC18998	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#800	LCTA	15GGB3111J3190014	GIL - Gilling Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
#801	LCTA	15GGB3111J3190015	GIL - Gilling Corporation	CNG LOW FLOOR	2018	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	No Service Status Event Recorded	-	-	-
*601	LCTA	1FDFE4F58HDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*602	LCTA	1FDFE4F58HDC54955	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 - Gilling Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Mileage	3/23/2018
000001502-00	PAAC	15GCB201731111860	GIL - Gilling Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Out of Service		Service status	3/23/2018
000001504-00	PAAC	15GCB2010310111880	GIL - Gilling 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 - Gilling Corporation	Phantom	2003	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Request early disposition	11/29/2017
000001701-00	PAAC	15GGB2719F1185791	GIL - Gilling Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018
000001702-00	PAAC	15GGB2719F1185793	GIL - Gilling Corporation	G27B103N4	2015	Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	In Service		Mileage	3/23/2018

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

Figure 30 Asset Record: Highlights

Capital Planning Tool (QA) Home Revenue Vehicles > Buses (Rubber Tire Vehicles) > Buses (Rubber Tire Vehicles) Profile

Revenue Vehicle Profile
CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017

Highlights

History 2 Tasks 0 Comments 0 Documents 0 Photos 0 Charts Asset Values Capital Projects 1 Audit Results 1

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

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

Figure 31 Asset Record: Profile and Summary

Asset Summary Profile

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

Age 0 yrs
Mileage
Reported New/Excellent
Condition

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

Useful Life
Benchmark
Useful Life
Remaining

Profile

Identification & Classification Characteristics Funding Procurement & Purchase Operations Registration & Title

Identification & Classification

Vehicle Identification Number (VIN)
15GGB2713H3189913

* Asset ID
#1701

External ID NTD ID

* Class
Buses (Rubber Tire Vehicles)

* Type
BU-Bus

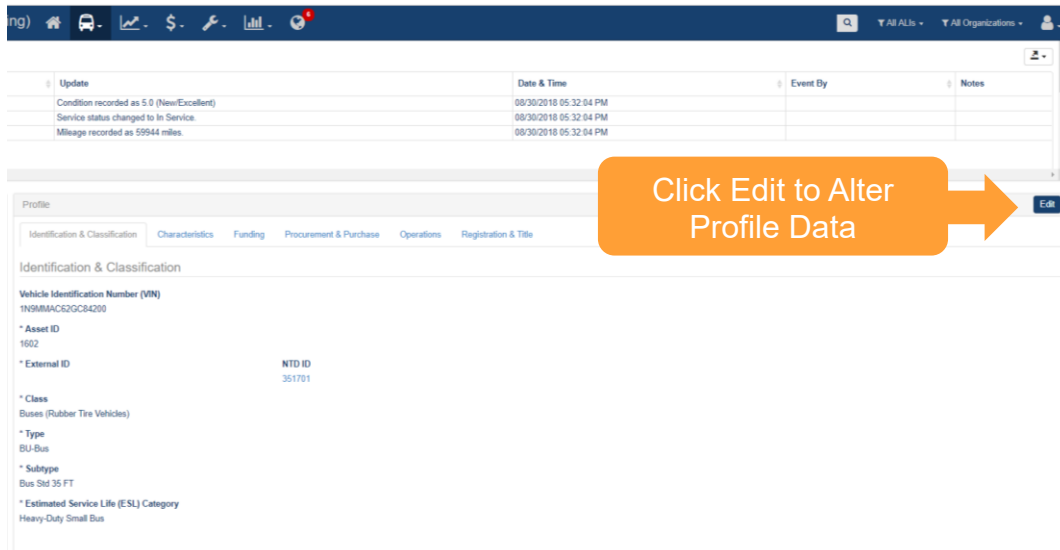
* Subtype
Bus Std 35 FT

* Estimated Service Life (ESL) Category
Heavy-Duty Large Bus

4.3 Editing or Updating Existing Asset Profile Data

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

Figure 32 Editing the Profile of an Existing Asset

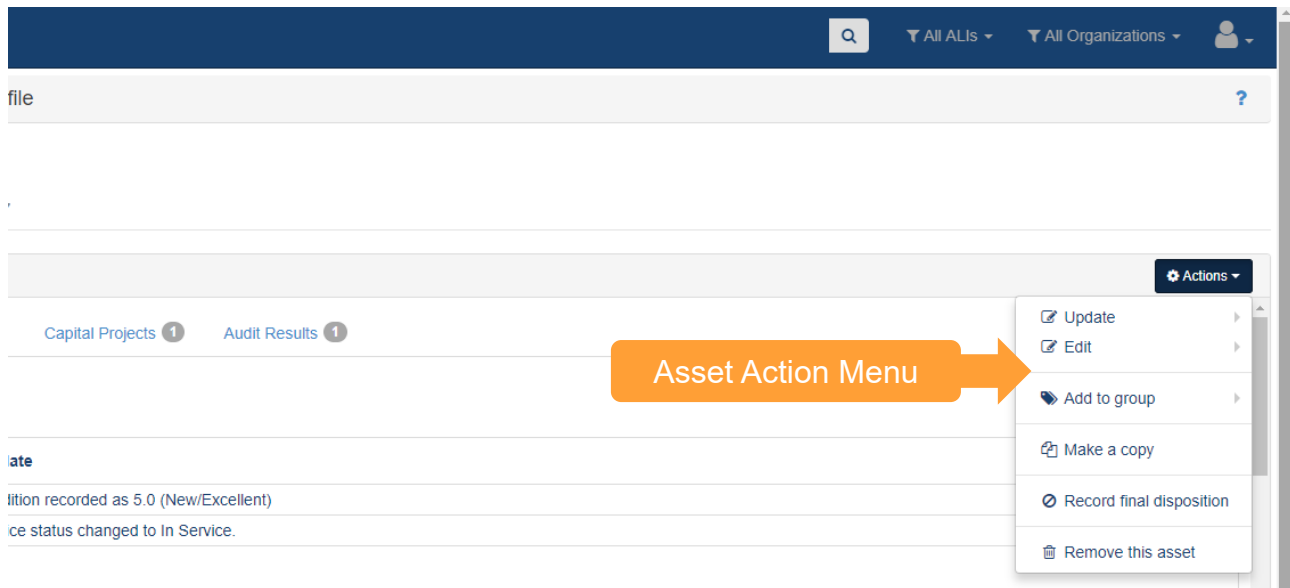


4.4 Updating Existing Asset Lifecycle Data

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

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

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

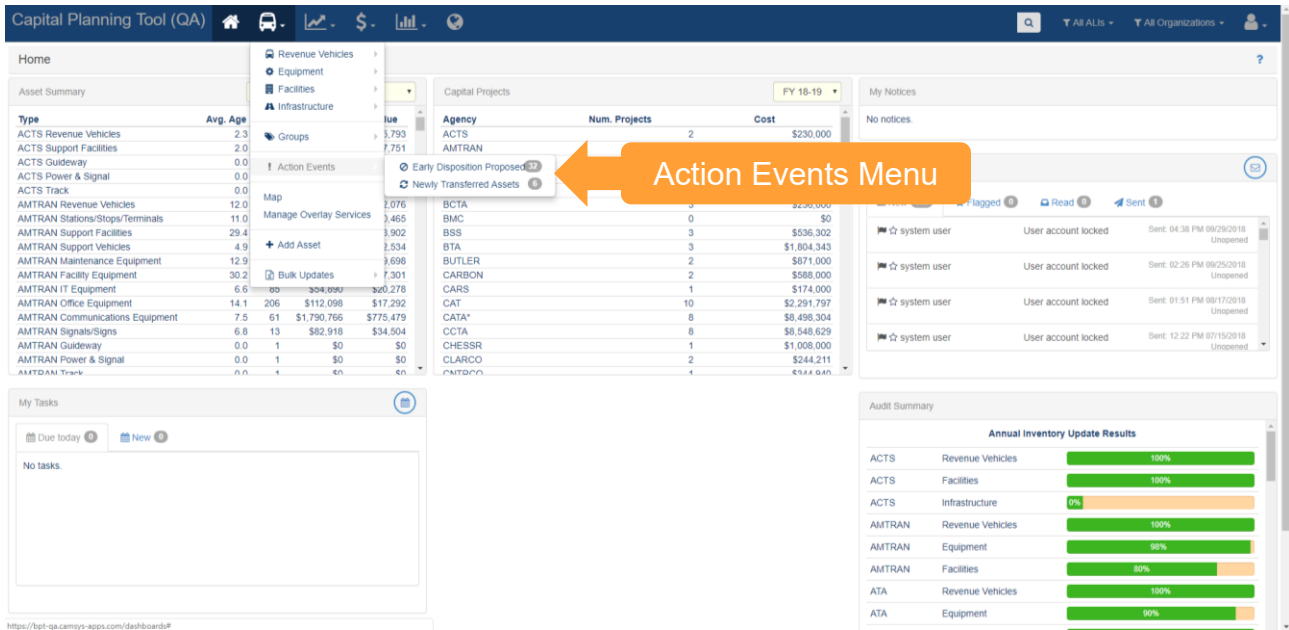
Figure 33 Updating the Lifecycle of an Existing Asset

4.5 Action Events (Disposition and Transfer Review)

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

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

Figure 34 Asset Action Events (Disposition and Transfer)

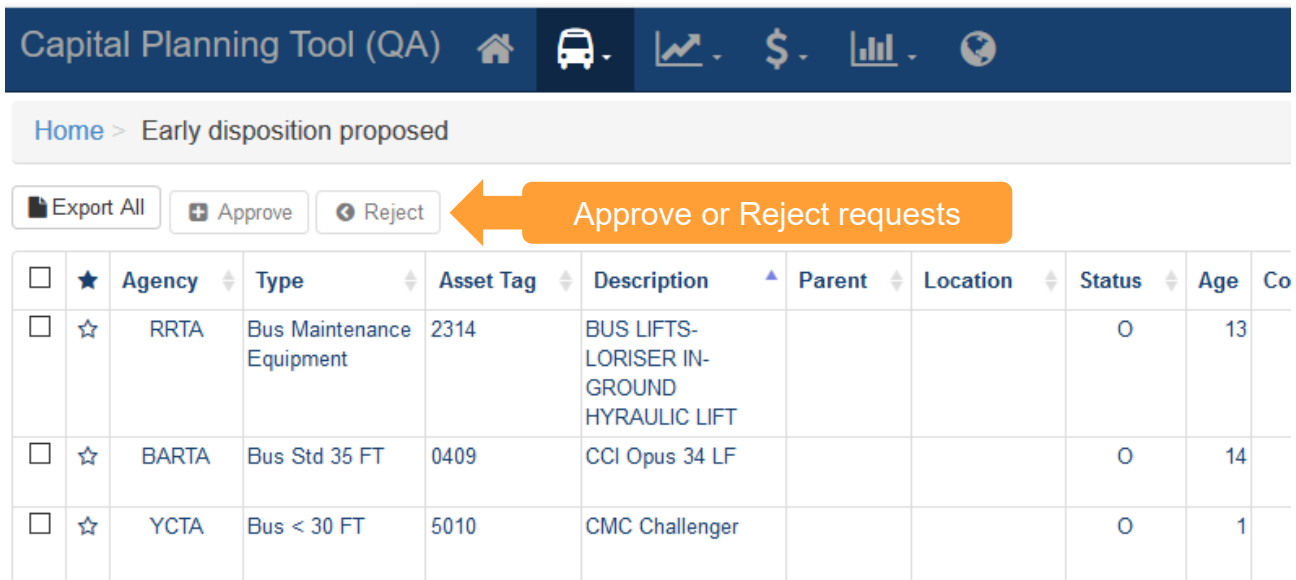


An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

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

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

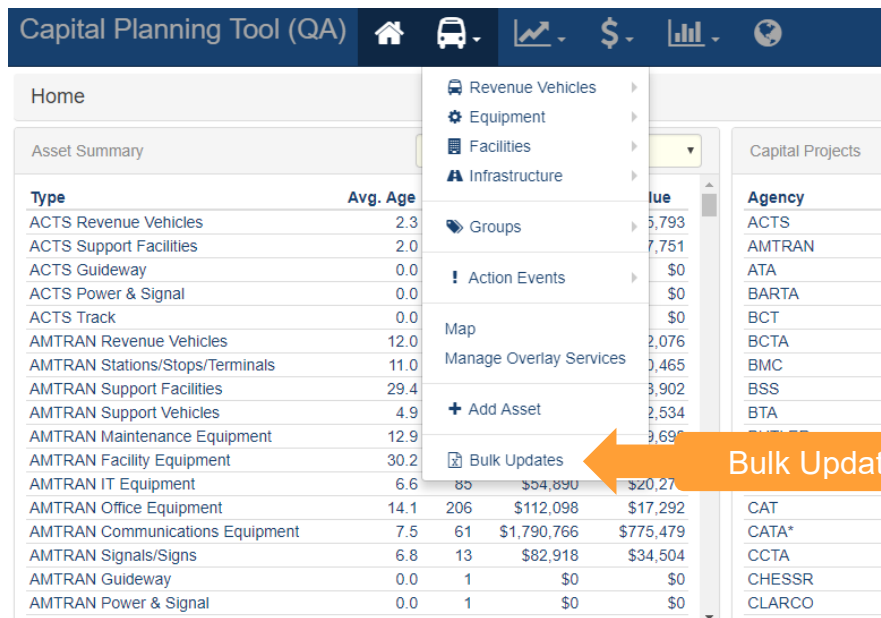
Figure 35 Early Disposition Requests



4.6 Adding or Updating Assets by Bulk Update

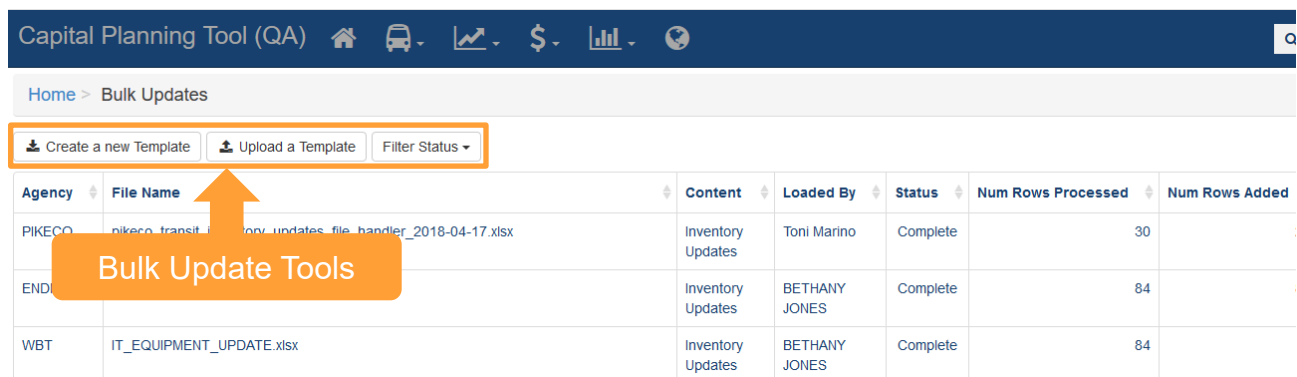
Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be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

Figure 36 Bulk Updates



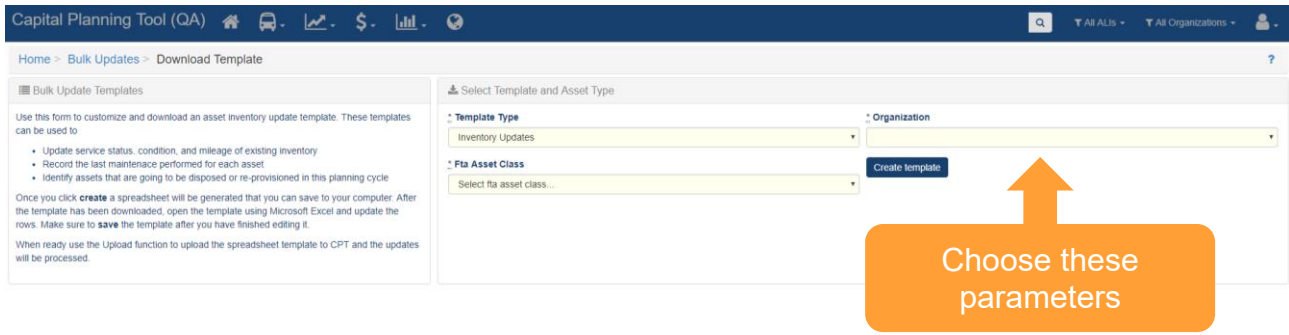
Selecting “Bulk Updates” allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

Figure 37 Bulk Update Tools



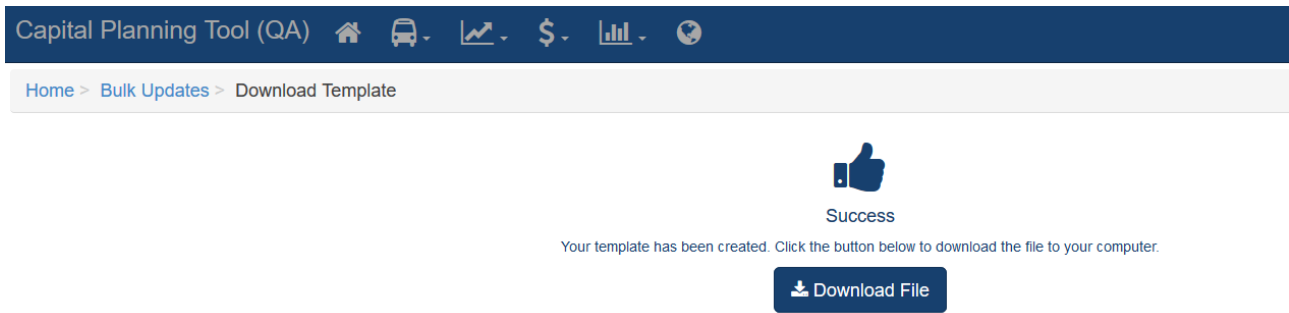
The first step to a bulk update is Creating a Template. Click “Create a new Template”, then select your Template Type, Organization, and Asset Class, then select “Create Template.”

Figure 38 Bulk Update Details



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

Figure 39 Bulk Update Spreadsheet Download



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

Figure 40 Bulk Update Spreadsheet

#	Asset	Agency	Asset ID	External ID	Class	Type	Subtype	ESL Category	Description	VIN	Current Status	Service Status Report	Reporting Date	New Status	Reporting Date	Current Condition	Rep
1	Object Key	ATA	703		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020684	In Service	01/23/2018				1.00	01
2	AZE18G2848EM	ATA	704		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020685	In Service	01/23/2018				1.00	01
3	AZE18G2848EM	ATA	705		Buses (Rubber Tire Vehicles)	Bus	30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020686	In Service	01/23/2018				1.00	01
4	AZE18G2848EM	ATA	706		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090105	In Service	01/23/2018				1.00	01
5	AZE18G2848EM	ATA	707		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090106	In Service	01/23/2018				2.00	01
6	AZE18G2848EM	ATA	708		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090107	In Service	01/23/2018				2.00	01
7	AZE18G2848EM	ATA	709		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090108	In Service	01/23/2018				2.00	01
8	AZE18G2848EM	ATA	710		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090109	In Service	01/23/2018				2.00	01
9	AZE18G2848EM	ATA	711		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090110	In Service	01/23/2018				2.00	01
10	AZE18G2848EM	ATA	712		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090111	In Service	01/23/2018				2.00	01
11	AZE18G2848EM	ATA	713		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090112	In Service	01/23/2018				2.00	01
12	AZE18G2848EM	ATA	714		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090113	In Service	01/23/2018				2.00	01
13	AZE18G2848EM	ATA	715		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090114	In Service	01/23/2018				2.00	01
14	AZE18G2848EM	ATA	716		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090115	In Service	01/23/2018				2.00	01
15	AZE18G2848EM	ATA	717		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090116	In Service	01/23/2018				2.00	01
16	AZE18G2848EM	ATA	718		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090117	In Service	01/23/2018				2.00	01
17	AZE18G2848EM	ATA	719		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090118	In Service	01/23/2018				2.00	01
18	AZE18G2848EM	ATA	720		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090119	In Service	01/23/2018				2.00	01
19	AZE18G2848EM	ATA	721		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090120	In Service	01/23/2018				2.00	01
20	AZE18G2848EM	ATA	722		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090121	In Service	01/23/2018				2.00	01
21	AZE18G2848EM	ATA	723		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090122	In Service	01/23/2018				2.00	01
22	AZE18G2848EM	ATA	724		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090123	In Service	01/23/2018				2.00	01
23	AZE18G2848EM	ATA	725		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090124	In Service	01/23/2018				2.00	01
24	AZE18G2848EM	ATA	726		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090125	In Service	01/23/2018				2.00	01
25	AZE18G2848EM	ATA	727		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090126	In Service	01/23/2018				2.00	01
26	AZE18G2848EM	ATA	728		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090127	In Service	01/23/2018				2.00	01
27	AZE18G2848EM	ATA	729		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090128	In Service	01/23/2018				2.00	01
28	AZE18G2848EM	ATA	730		Buses (Rubber Tire Vehicles)	Bus	< 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090129	In Service	01/23/2018				2.00	01
29	AZE18G2848EM	ATA	731		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB291851116445	In Service	01/23/2018				2.00	01
30	AZE18G2848EM	ATA	732		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB291851116446	In Service	01/23/2018				2.00	01
31	AZE18G2848EM	ATA	733		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB291851116447	In Service	01/23/2018				2.00	01
32	AZE18G2848EM	ATA	734		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB291851116448	In Service	01/23/2018				2.00	01
33	AZE18G2848EM	ATA	735		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079688	In Service	01/23/2018				2.00	01
34	AZE18G2848EM	ATA	736		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079689	In Service	01/23/2018				2.00	01
35	AZE18G2848EM	ATA	737		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079690	In Service	01/23/2018				2.00	01
36	AZE18G2848EM	ATA	738		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079691	In Service	01/23/2018				2.00	01
37	AZE18G2848EM	ATA	739		Buses (Rubber Tire Vehicles)	Bus	Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079692	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 41 Bulk Update Upload

Capital Planning Tool (QA) Home > Bulk Updates > New Template

Bulk Updates

Use this form to upload spreadsheets that you have downloaded from CPT and completed. The spreadsheets can contain either:

- Life Cycle Updates for existing inventory
- Disposition updates for existing inventory

Make sure to select the right type of content before uploading the file.

If you force the update, be aware that this might overwrite and change existing data that CANNOT be undone.

Once the file has been uploaded it will be processed by CPT and the inventory updated which might take a few minutes. You can check the progress by clicking on the file name in the table.

Spreadsheet

Spreadsheet Content
Inventory Updates

Organization
CATA*-Centre Area Transportation Authority

Spreadsheet
Browse... | cata_transit_inventory_updates_file_handler_2018-06-13.xlsx
Select a spreadsheet that has been downloaded from CPT, edited, then saved.

Upload spreadsheet

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 42 Bulk Upload Processing

Capital Planning Tool (QA) Home > Bulk Updates

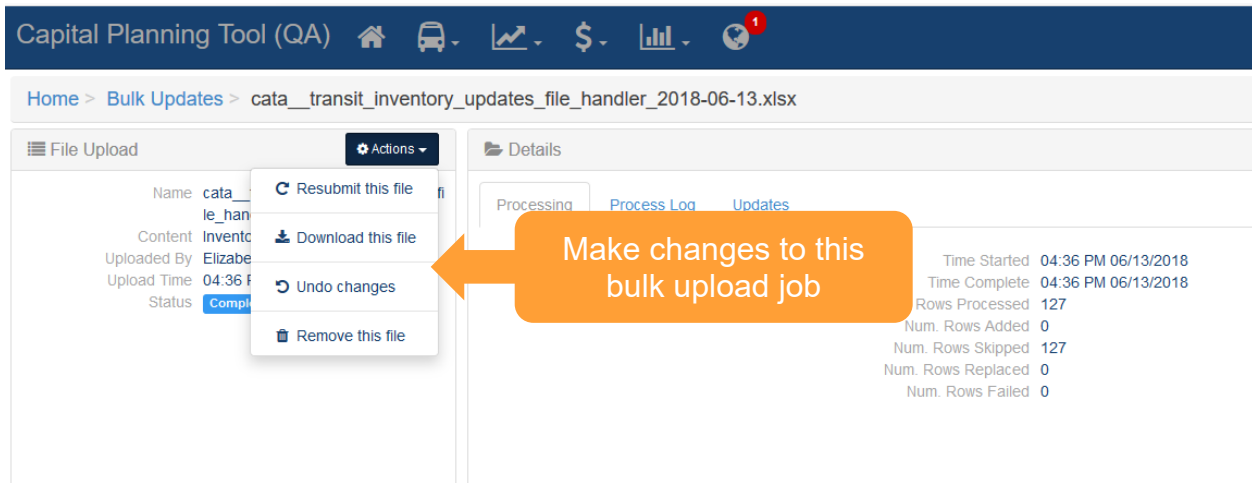
File was successfully uploaded.

Create a new Template Upload a Template Filter Status

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

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

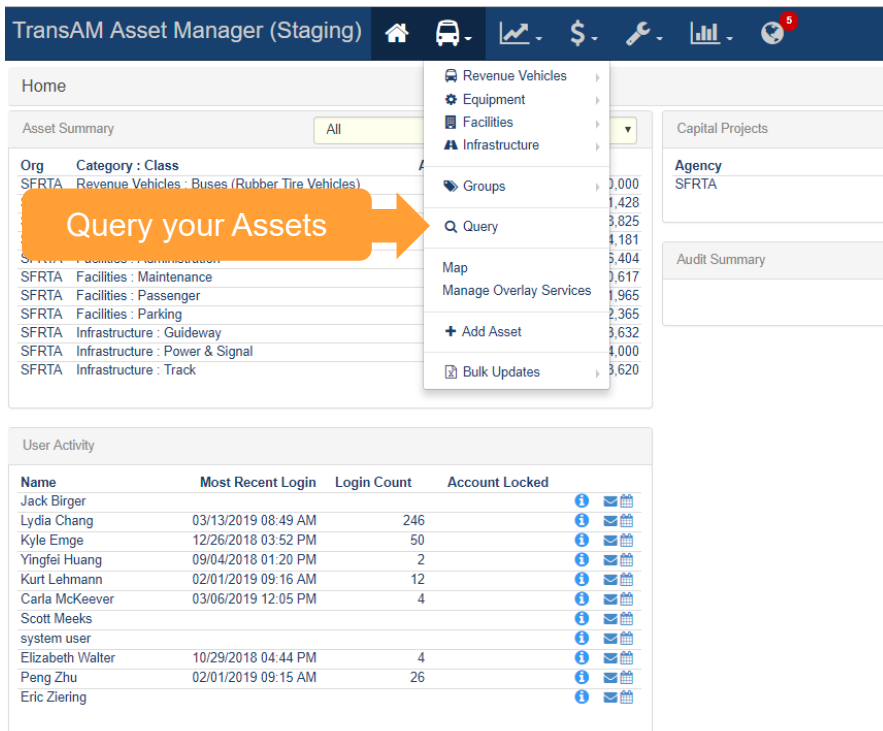
Figure 43 Bulk Update Edit



4.7 Query

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

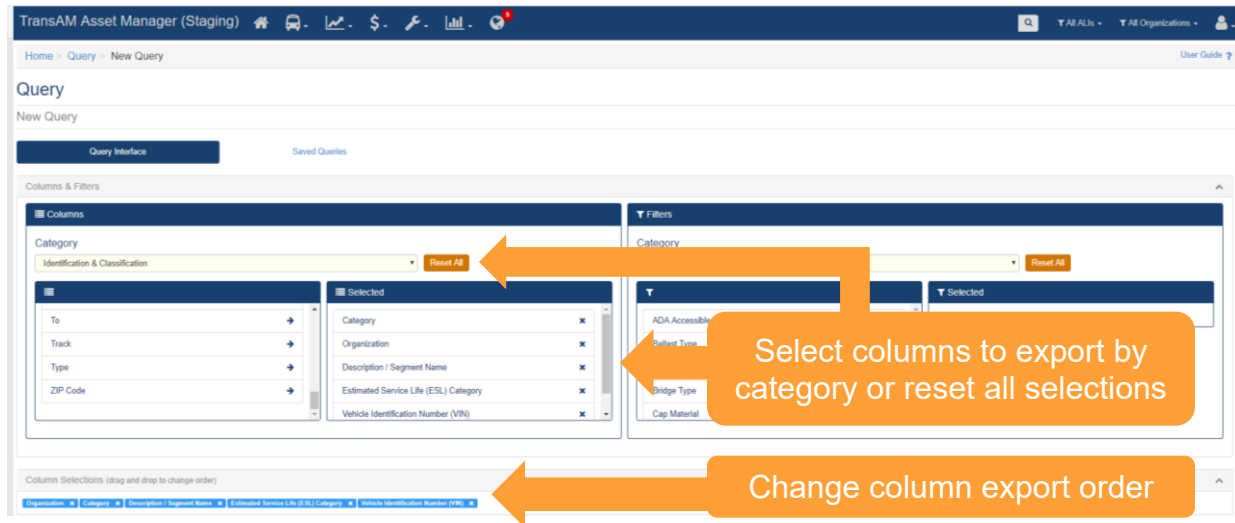
Figure 44 Asset Query



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

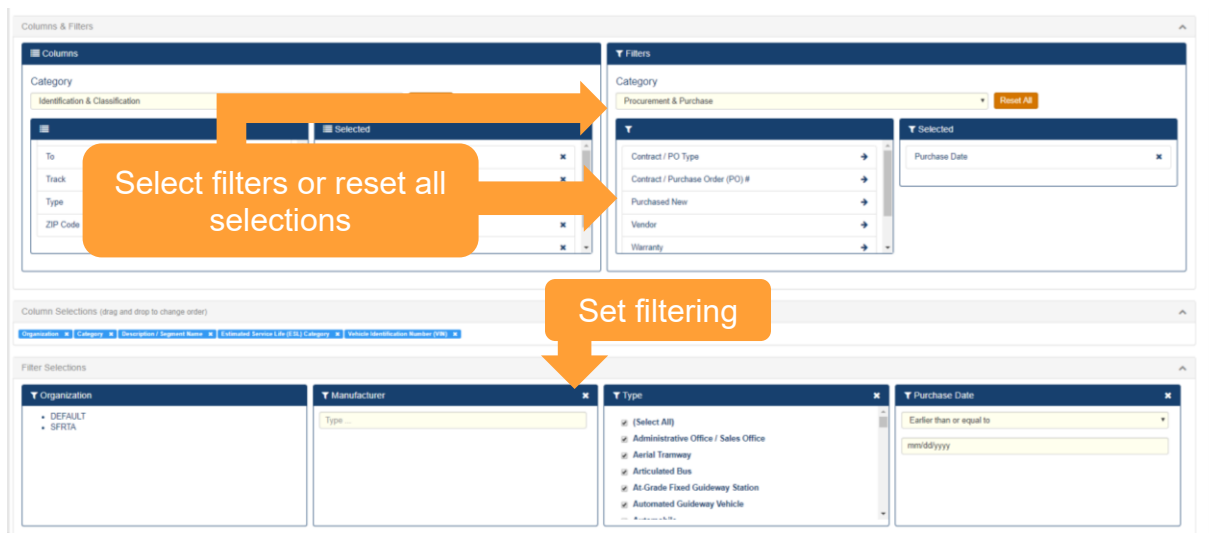
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

Figure 45 Column Selection



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

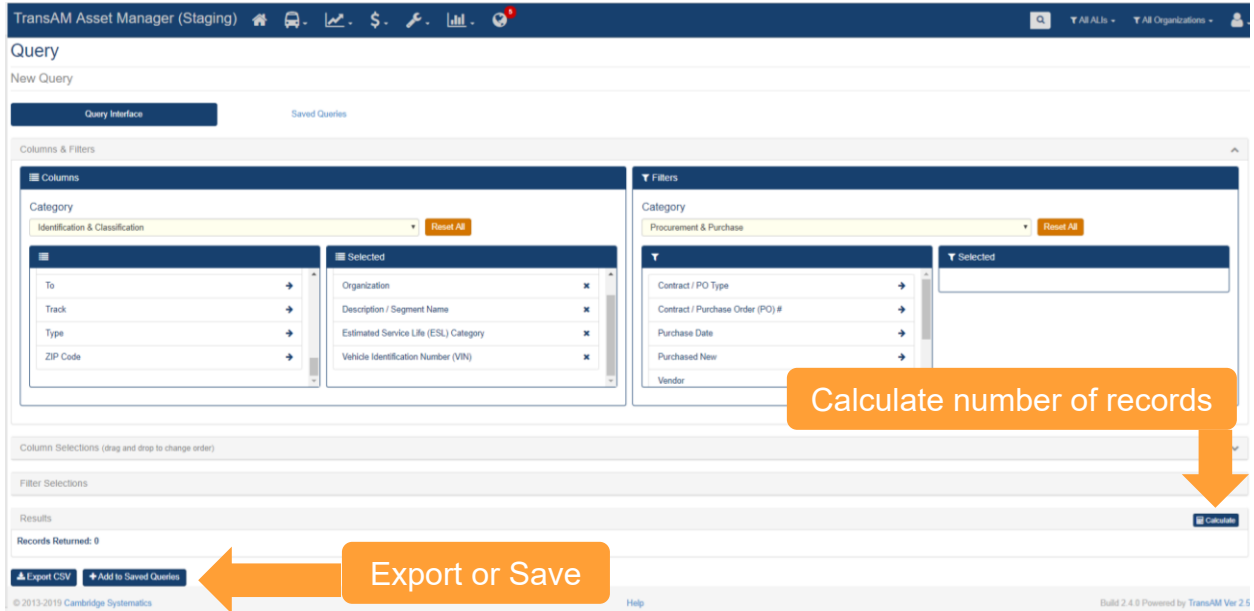
Figure 46 Filter Selection



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

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

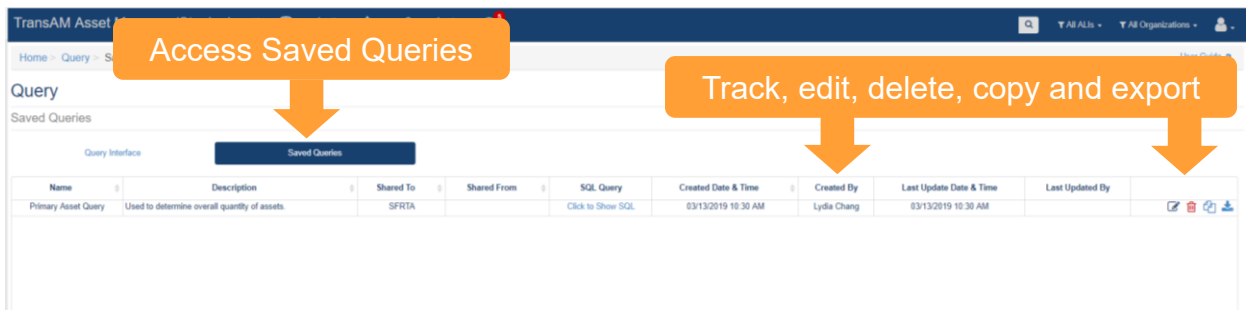
Figure 47 Calculate, Export or Save



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

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

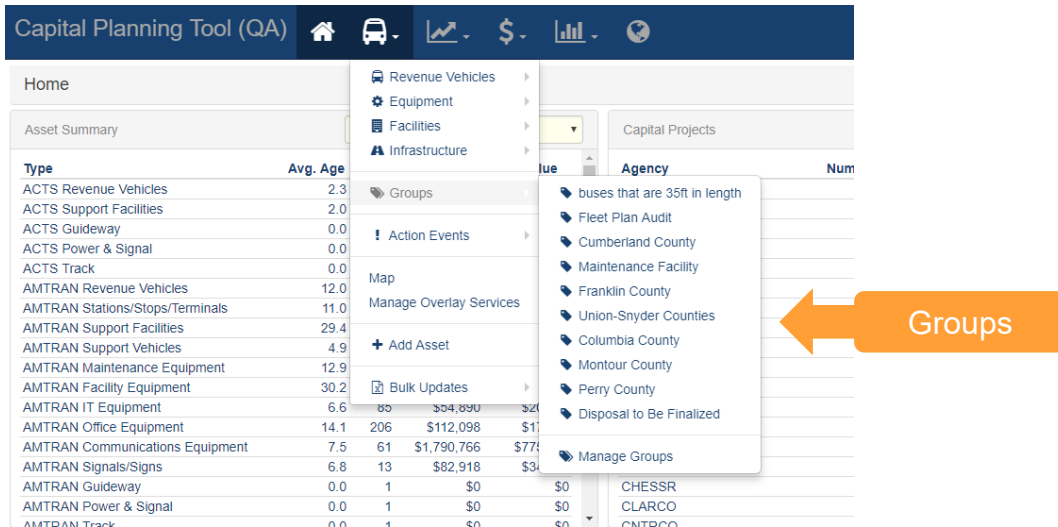
Figure 48 Saved Queries



4.8 Groups

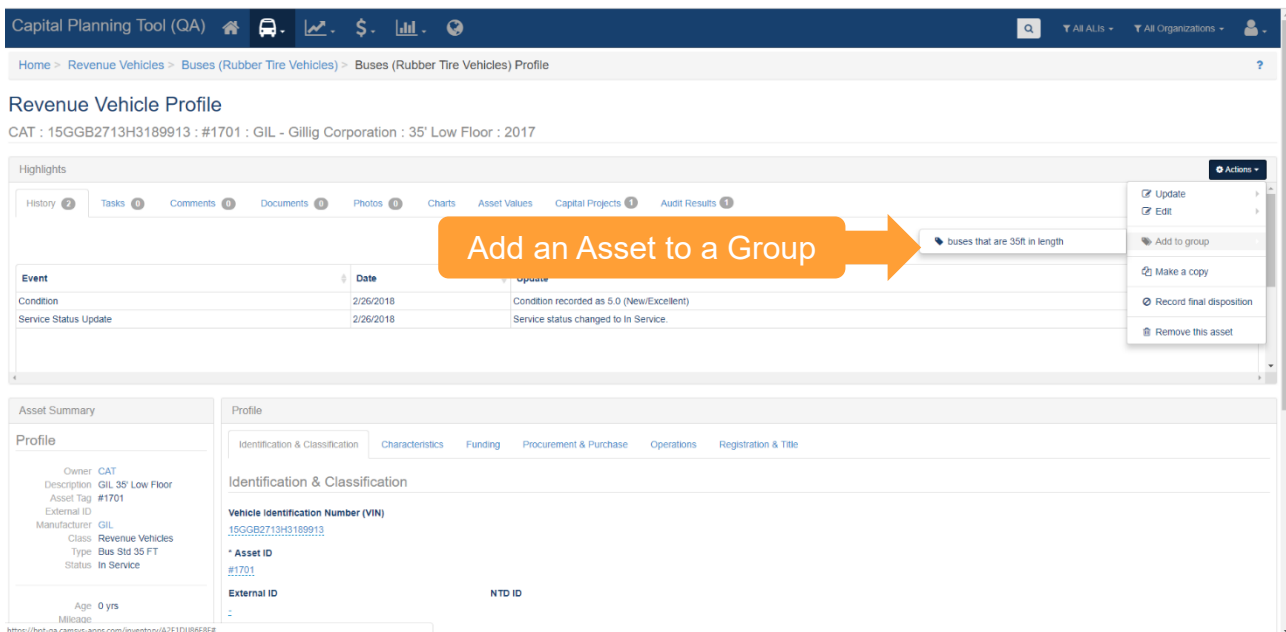
Agencies can create an on-the-fly collection of assets called groups so that they can quickly recall commonly viewed assets all at once. They can be accessed from the Asset Inventory Menu.

Figure 49 Asset Groups



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

Figure 50 Adding an Asset to a Group



5.0 Maintenance

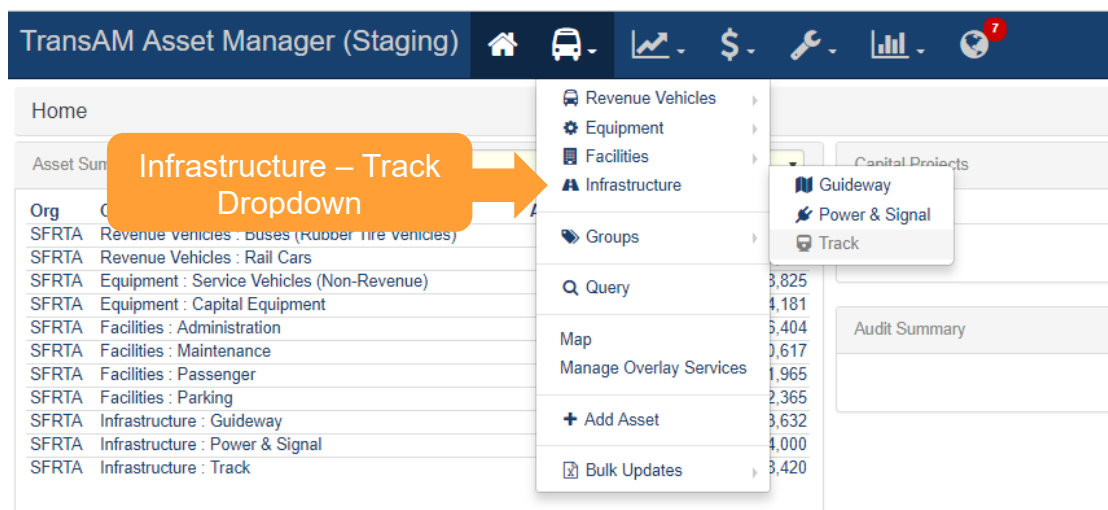
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

5.1 Performance Restrictions

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

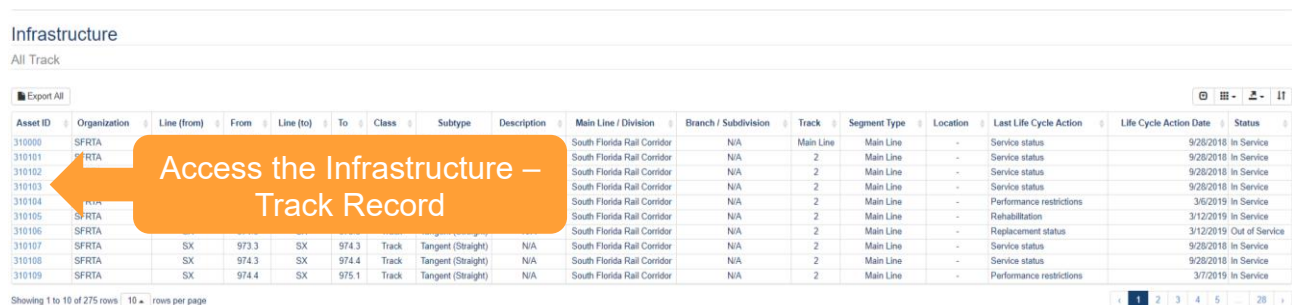
Performance Restrictions can be reported within an individual Infrastructure – Track asset profile, which can be accessed from the Asset Inventory dropdown

Figure 51 Asset Inventory Dropdown : Infrastructure - Track



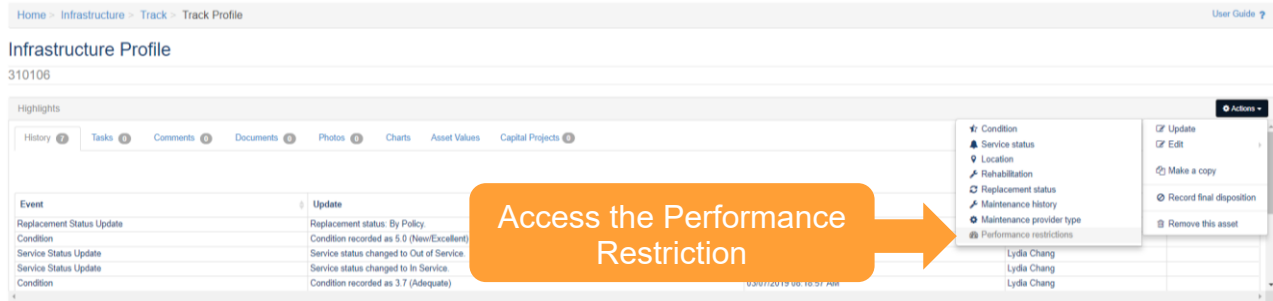
Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

Figure 52 Existing Asset Interface : Infrastructure - Track



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

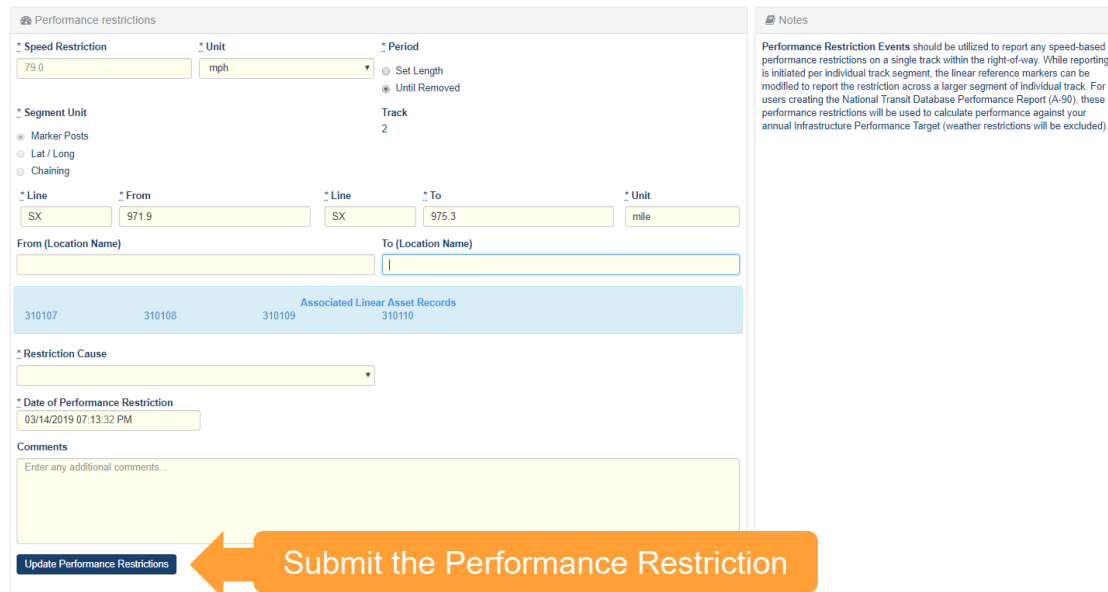
Figure 53 Lifecycle Action Menu



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

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

Figure 54 Performance Restriction Lifecycle Event



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

Figure 55 Maintenance Dropdown

The screenshot shows the TransAM Asset Manager interface. At the top, there's a navigation bar with icons for Home, Assets, Reports, and Performance Restrictions. Below this, a 'Maintenance Dropdown' menu is open, listing various categories and their associated metrics (Avg. Age, Count, Cost). An orange arrow points to the 'Maintenance' option in the dropdown. To the right, there are sections for 'Capital Projects' and 'Audit Summary'.

Org	Category : Class	Avg. Age	Count	Cost
SFRTA	Revenue Vehicles : Buses (Rubber Tire Vehicles)	1.9	27	\$6,800,000
SFRTA	Revenue Vehicles : Rail Cars	12.6	80	\$120,451,428
SFRTA	Equipment : Service Vehicles (Non-Revenue)	4.9	18	\$428,825
SFRTA	Equipment : Capital Equipment	34.1	389	\$23,444,181
SFRTA	Facilities : Administration	4.0	2	\$20,416,404
SFRTA	Facilities : Maintenance	21.0	2	\$5,850,617
SFRTA	Facilities : Passenger	17.2	18	\$80,231,965
SFRTA	Facilities : Parking	5.0	2	\$16,682,365
SFRTA	Infrastructure : Guideway	96.9	585	\$854,353,632
SFRTA	Infrastructure : Power & Signal	117.5	244	\$86,864,000
SFRTA	Infrastructure : Track	110.9	1100	\$312,118,420

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

Figure 56 Performance Restriction Management

The screenshot displays the 'Performance Restrictions' management interface. It features a table of active restrictions with various columns for identification and management. A 'Closeout' button is present for each row, allowing users to manually close a restriction. The table shows details such as the asset/segment ID, organization, description, subtype, line, track, speed, and restriction cause.

Asset / Segment ID	Org	Desc / Segment Name	Subtype	Line	From	Line	To	Track	Max Permissible Speed	Unit	Speed Restriction	Unit	Restriction Cause	Active Start	Active End	Submitted By	Status	Comments	Closeout
311107	SFRTA	N/A	Tangent (Straight)	SX	1,024.00	SX	1,024.60	2	79	mph	25	mph	Other	07/05/2017 12:00 AM	Until Removed		Active		Closeout
310104	SFRTA	N/A	Tangent (Straight)	SX	970.20	SX	970.40	2	30	mph	20	mph	Rail Defect	03/06/2019 09:52 AM	Until Removed	Lydia Chang	Active		Closeout
311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 10:26 AM	Until Removed	Lydia Chang	Active		Closeout
311107	SFRTA	N/A	Tangent (Straight)	SX	1,023.40	SX	1,028.30	2	79	mph	25	mph	Maintenance	03/12/2019 11:19 AM	03/19/2019 11:19 AM	Lydia Chang	Active		Closeout
Multiple	SFRTA	Multiple	Multiple	SX	991.00	SX	992.00	Single	Multiple	mph	20	mph	Rail Defect	03/13/2019 02:18 PM	Until Removed	Lydia Chang	Active		Closeout
Multiple	SFRTA	Multiple	Multiple	SX	964.10	SX	965.00	Single	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:19 PM	Until Removed	Lydia Chang	Active		Closeout
Multiple	SFRTA	Multiple	Multiple	SX	969.10	SX	970.00	Single	Multiple	mph	25	mph	Rail Defect	03/13/2019 02:22 PM	Until Removed	Lydia Chang	Active		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 57 Policies Dropdown

Type	Avg. Age	Count		
ACTS Revenue Vehicles	3.3	23		
ACTS Support Facilities	2.0	1		
AMTRAN Revenue Vehicles	11.8	29		
AMTRAN Stations/Stops/Terminals	10.6	5	\$58,487	\$20,462
AMTRAN Support Facilities	29.0	5	\$2,274,755	\$1,108,904
AMTRAN Support Vehicles	4.6	7	\$205,513	\$72,536
AMTRAN Maintenance Equipment	12.7	211	\$3,036,981	\$478,390
AMTRAN Facility Equipment	30.5	90	\$2,907,326	\$1,132,105
AMTRAN IT Equipment	6.2	84	\$54,756	\$20,143
AMTRAN Office Equipment	14.0	204	\$111,710	\$16,903
AMTRAN Communications Equipment	7.0	61	\$1,790,766	\$775,475
AMTRAN Signals/Signs	7.0	12	\$81,553	\$33,134
ATA Revenue Vehicles	8.1	104	\$18,778,488	\$2,698,762

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

Figure 58 Policy Rule Sets

6.1 Asset Replacement/Rehabilitation Policy

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

Figure 59 Asset Replacement/Rehabilitation Policy

The screenshot shows the Capital Planning Tool (QA) interface. At the top, there is a navigation bar with icons for home, a vehicle, a chart, a dollar sign, a bar chart, and a globe. Below the navigation bar, there is a 'Home' section with a 'Policies' dropdown menu. The dropdown menu is open, showing options like 'Capital Projects', 'Project Planner', 'SOGCR Capital Project Analyzer', 'All Audit Results', and 'Annual Inventory Update Results'. An orange callout box with the text 'Asset Replacement/Rehabilitation Selection' points to the 'Asset Replacement/Rehabilitation Policy' option in the dropdown. Below the dropdown, there is a table with columns for 'Type', 'Avg. Age', 'Count', 'Cost', and 'Book'. The table lists various asset types such as 'ACTS Revenue Vehicles', 'AMTRAN Revenue Vehicles', and 'AMTRAN Support Facilities' with their respective values. On the right side, there is a 'Filter' section with a dropdown for 'FY 18-19' and a 'My Ne' button. At the bottom, there is a 'My Tasks' section with a calendar icon.

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

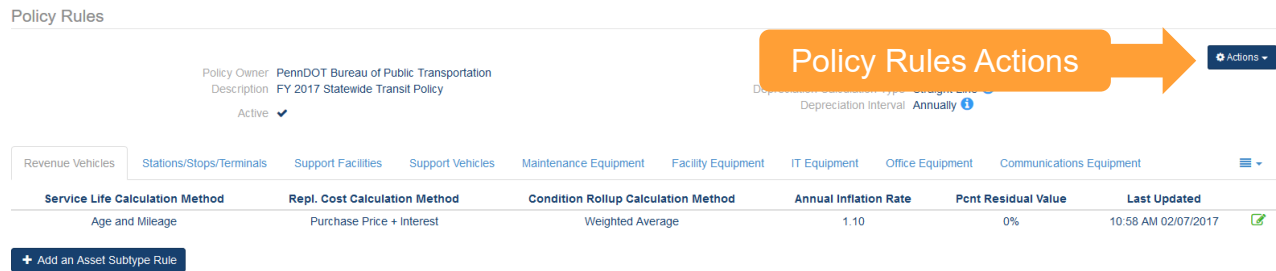
Figure 60 Asset Replacement/Rehabilitation Policy Filters

The screenshot shows the Capital Planning Tool (QA) interface with the 'Asset Replacement/Rehabilitation Policy' filters. The navigation bar at the top includes a search icon and a user profile icon. Below the navigation bar, there is a breadcrumb trail: 'Home > Policies > Asset Replacement/Rehabilitation Policy > BPT Policy'. The main content area is titled 'Asset Replacement/Rehabilitation Policy' and contains a 'Filters' section. The 'Filters' section has two dropdown menus: 'BPT-PennDOT Bureau of Public Transportation' and 'FY 2017 Statewide Transit Policy (Current)'. Below the filters, there is a 'Policy Rules' section. Two orange callout boxes with arrows point to the 'Organization Filter' and 'Policy Year' dropdowns. The 'Policy Rules' section displays various parameters such as 'Condition Threshold: 2.50', 'Depreciation Calculation Type: Straight Line', and 'Depreciation Interval: Annually'. At the bottom, there is a table with columns for 'Service Life Calculation Method', 'Repl. Cost Calculation Method', 'Condition Rollup Calculation Method', 'Annual Inflation Rate', 'Pcnt Residual Value', and 'Last Updated'. The table contains the following data:

Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method	Annual Inflation Rate	Pcnt Residual Value	Last Updated
Age Only	Purchase Price + Interest	Weighted Average	1.10	0%	07:58 AM 12/05/2015

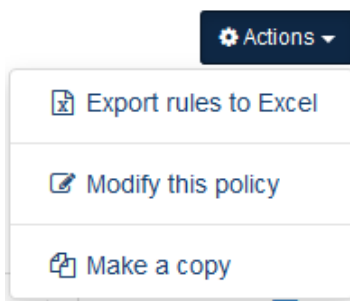
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 61 Policy Rules



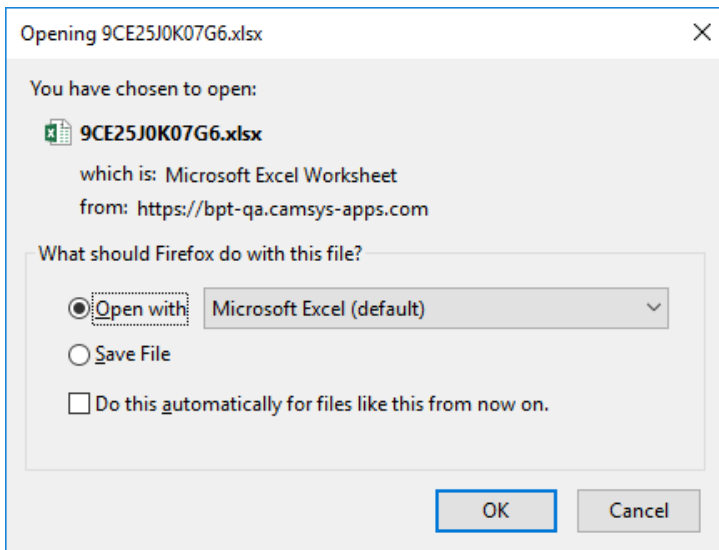
The Actions button will display a list of options as shown.

Figure 62 Policy Rules Actions Dropdown



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

Figure 63 Export rules to Excel (Windows dialog box)



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

Figure 64 Modify (Update) Organization Policy Dialog

Update Policy

Description

FY 2017 Statewide Transit Policy

Condition Threshold

2.5

Depreciation Calculator

Straight Line

Depreciation Interval

Annually

Update Policy

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 65 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 66 Asset Types

Revenue Vehicles Stations/Stops/Terminals Support Facilities Support Vehicles Maintenance Equipment Facility Equipment IT Equipment Office Equipment Communications Equipment										
Service Life Calculation Method	Repl. Cost Calculation Method	Condition Rollup Calculation Method			Annual Inflation Rate	Pcnt Residual Value	Last Updated			
Age and Mileage	Purchase Price + Interest	Weighted Average			1.10	0%	10:58 AM 02/07/2017			
+ Add an Asset Subtype Rule										
Asset Subtype	Fuel Type	ESL (Mo)	ESL (Mi)	Repl. Cost	Cost FY	Replace New	Replace Leased	Asset Types		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 67 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 68 Asset Type Rules

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

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

Figure 69 Edit Icon



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

Figure 70 Modify Asset Policy Rule

Modify Rule: IT Equipment X

* Service Life Calculation Type: Age Only
 * Replacement Cost Calculation Type: Purchase Price + Interest
 Condition Rollup Calculation Type: Weighted Average
 * Annual Inflation Rate: 1.1
 * Pcnt Residual Value: 0
 * Condition Rollup Weight: 0

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 71 Asset Type and Asset Subtype rules

Revenue Vehicles	Stations/Stops/Terminals	Support Facilities	Support Vehicles	Maintenance Equipment	Facility Equipment	IT Equipment	Office Equipment				
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 <input type="checkbox"/>			
Asset Subtype	Fuel Type	ESL (Mo)	ESL (MI)	Repl. Cost	Cost FY	Replace New	Replace Leased	Replace With	Replace Fuel Type	ESL Used (Mo)	<input type="checkbox"/>
Bus Std 35 FT	DF	144	500,000	\$0	FY 17-18	<input checked="" type="checkbox"/>				48	<input checked="" type="checkbox"/>
Bus Std 35 FT	BD	144	500,000	\$0	FY 17-18	<input checked="" type="checkbox"/>				48	<input checked="" type="checkbox"/>
Bus Std 35 FT	HD	144	500,000	\$0	FY 17-18	<input checked="" type="checkbox"/>				48	<input checked="" type="checkbox"/>
Bus 30 FT	DF	120	350,000	\$0	FY 17-18	<input checked="" type="checkbox"/>				48	<input checked="" type="checkbox"/>
Bus < 30 FT	DF	60	150,000	\$0	FY 17-18	<input checked="" type="checkbox"/>				48	<input checked="" type="checkbox"/>

Asset Subtype Rules

↓

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

Figure 72 Modify Asset Subtype Rule

Modify Rule: Guideway: At-Grade X

Replacement

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

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

* Purchase Replacement Code: 12.22.06
 * Lease Replacement Code: 12.26.06

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

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 73 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.

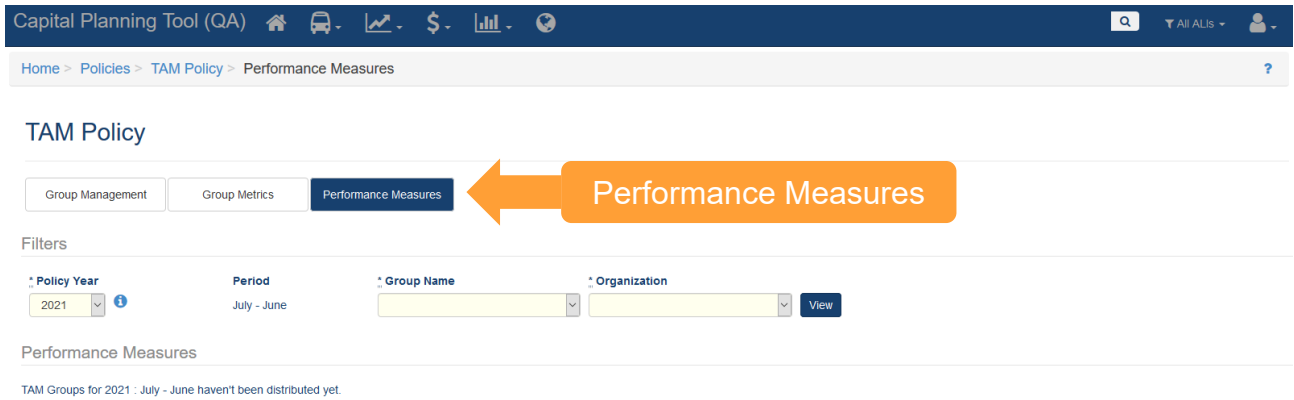
Figure 74 TAM Policy Dropdown Menu Selection

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, Assets, Analytics, Finance, and Reports. The main content area displays an 'Asset Summary' table with columns for Type, Avg. Age, Count, Cost, and Book Value. A dropdown menu is open, showing options like Policies, Capital Projects, Project Planner, SOGR Capital Project Analyzer, All Audit Results, and Annual Inventory Update Results. An orange callout box with an arrow points to the 'TAM Policy' option in the dropdown menu.

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

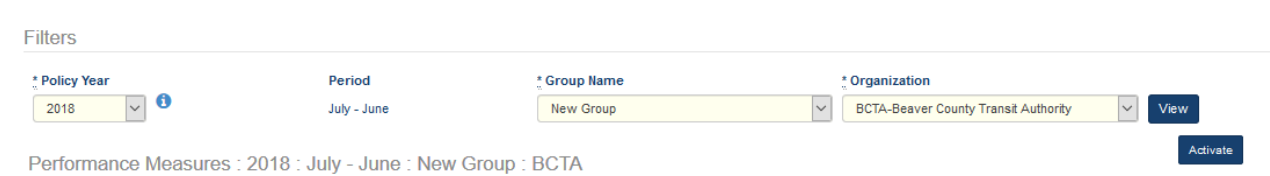
The first step in the creation of a TAM Policy, is to Add a New Policy Year, followed by creating groups. These initial steps can only be completed on the Group Management tab, which is only accessible by users with the TAM Group Manager or Admin permission.

Figure 75 TAM Policy Performance Measures



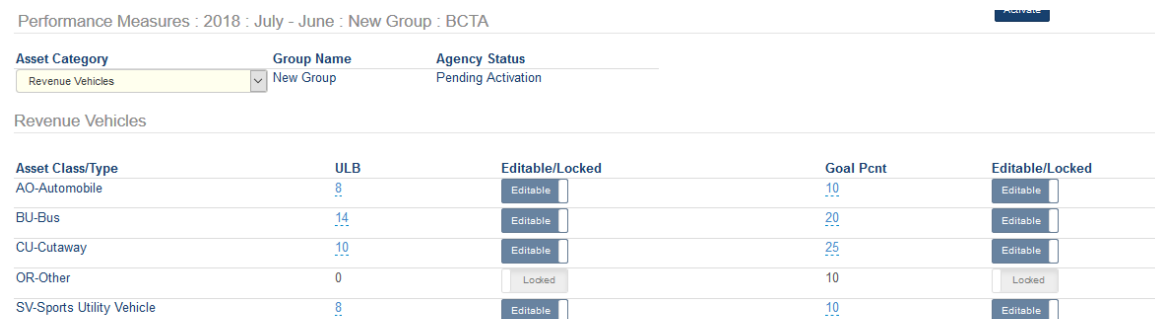
To view an organizations Performance Measures, select the correct Policy Year, Group Name, and Organization and click the “View” button.

Figure 76 Policy Year Filters



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 77 Asset Type Percentage Settings



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 78 Activate Performance Measures

TAM Policy

Group Management Group Metrics **Performance Measures**

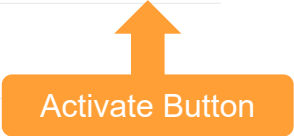
Filters

* Policy Year: 2018 Period: July - June * Group Name: New Group * Organization: BCTA-Beaver County Transit Authority View

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

Activate

Asset Category	Group Name	Agency Status
Facilities	New Group	Pending Activation



Facilities

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

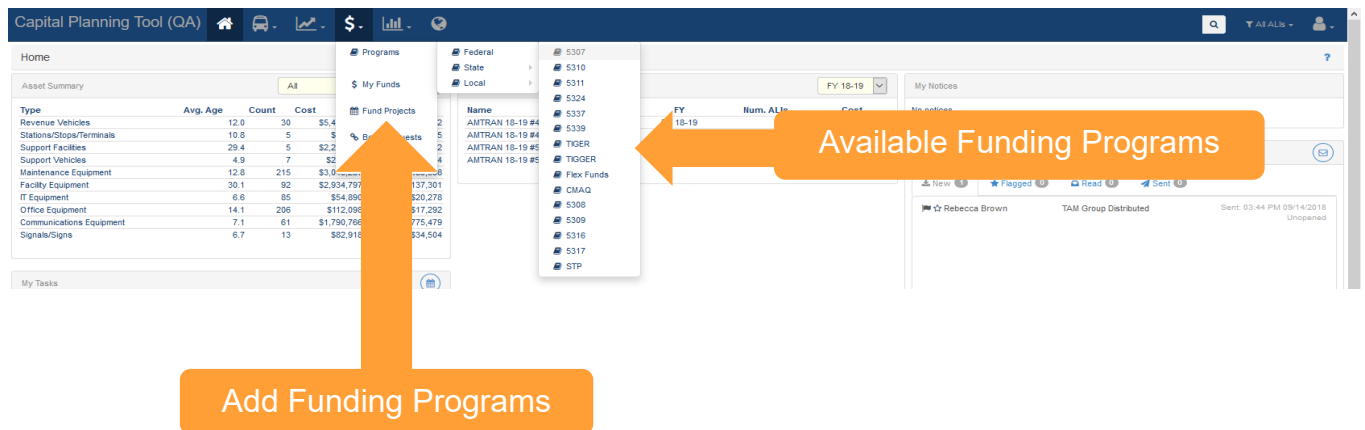
7.0 Funding

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

7.1 Programs

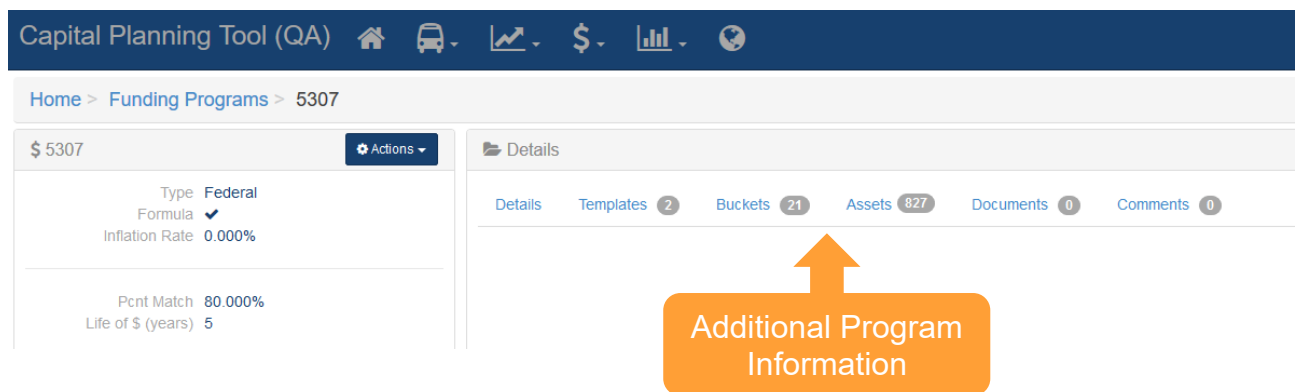
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

Figure 79 Available Funding Programs



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

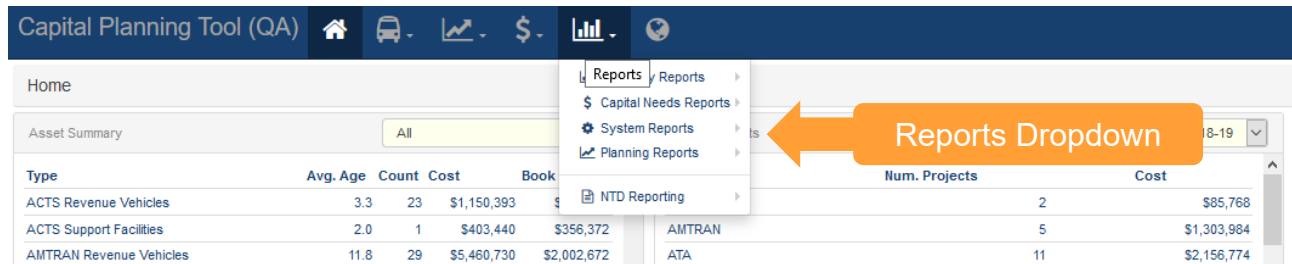
Figure 80 Funding Program Details



8.0 Reports

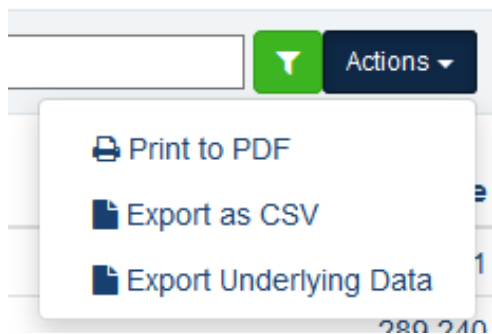
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 81 Reports Dropdown



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 82 Report Exports



8.1 Inventory Reports

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

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

Figure 83 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 84 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 85 Asset Funding Source Report

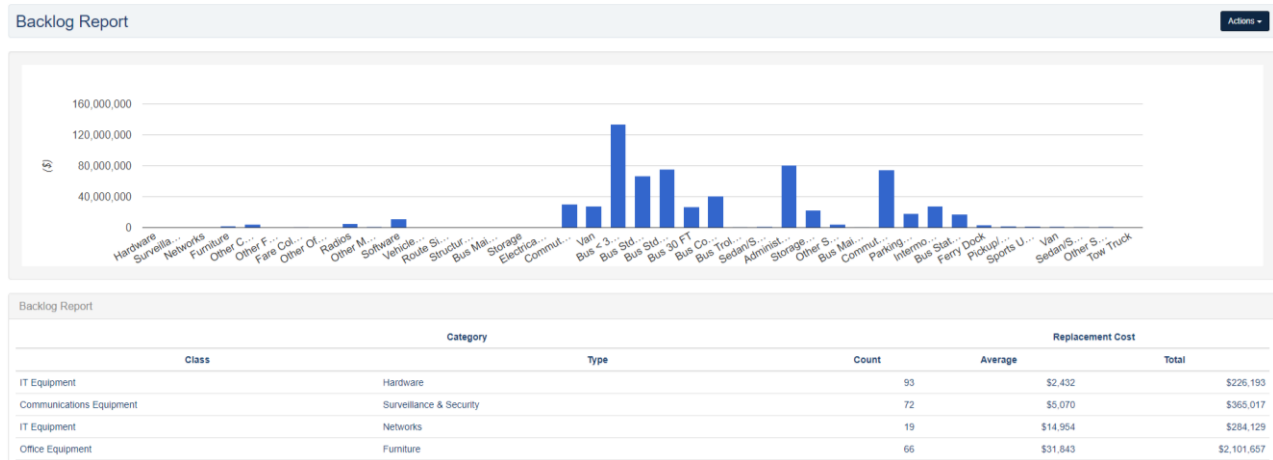


8.2 Capital Needs Reports

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

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

Figure 86 Backlog Report



8.3 Planning Reports

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

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

Figure 87 Revenue Vehicle Replacement Report

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	\$25,050,859	\$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	\$12,698,894	\$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	\$24,409,851	\$24,272,352
FY 19-20	Revenue Vehicles	Other Passenger Vehicles	Commuter Rail Car Trailer	71	\$112,539,277	\$25,462,588

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

Figure 88 State of Good Repair Report

State of Good Repair Report					
State of Good Repair: All Transit Agencies					
Category	Class	Sub Type	Count	Book Value	Replacement Cost
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Articulated	11	\$6,197,520	\$8,414,445
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	438	\$138,243,902	\$189,321,201
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	27	\$416,191	\$1,476,958
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	161	\$67,597,460	\$92,477,734
Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	623	\$208,254,531	\$285,010,765
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	\$55,103,445
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	\$729,599	\$2,272,877
Equipment	Service Vehicles (Non-Revenue)	Sedan/Station Wagon	62	\$437,762	\$1,546,568
Equipment	Service Vehicles (Non-Revenue)	Other Support Vehicle	31	\$212,606	\$1,610,645
Equipment	Service Vehicles (Non-Revenue)	Tow Truck	2	\$0	\$344,361
Equipment	Capital Equipment	Bus Maintenance Equipment	1,033	\$7,860,493	\$11,975,400
Equipment	Capital Equipment	Other Maintenance Equipment	140	\$11,904,184	\$16,743,863
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 89 Disposition Report

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

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

Figure 90 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.) Pcnt	# Past ESL (Mi.) Pcnt	# Past TERM Thres	Pcnt
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 91 TAM Service Life Summary Report

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

9.0 Specialized Reports

9.1 Asset Fleet Builder

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

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

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

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

Figure 92 Asset Fleet Builder

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

Capital Planning Tool (QA) Home > Fleets > Manage Fleets

Fleets

Revenue Vehicles Support Vehicles **Manage Fleets**

Orphaned Assets

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

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

Asset Fleet Builder

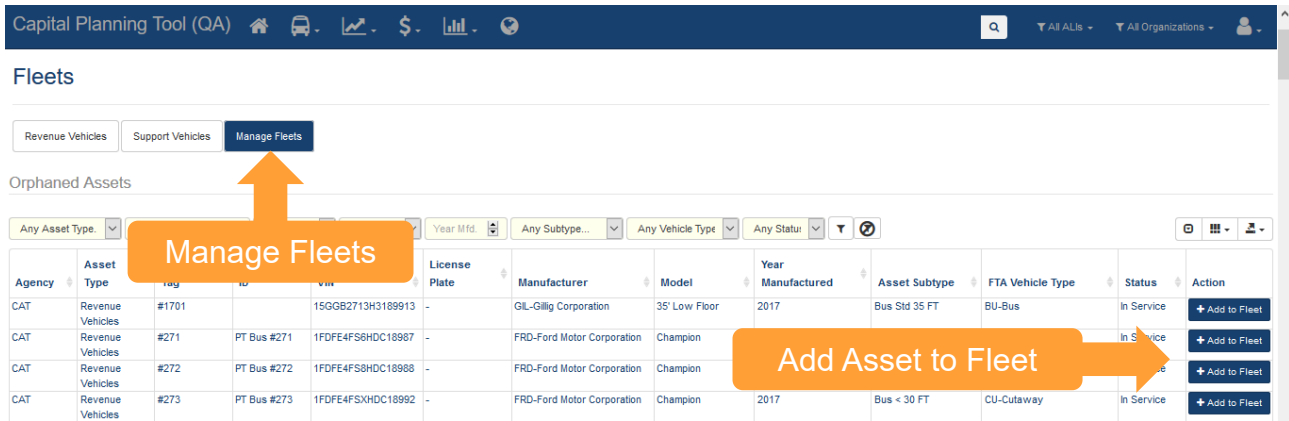
The **Asset Fleet Builder** analyzes your organization's inventory and groups assets into fleets following parameters set by NTD reporting. If you run the asset fleet builder, you will delete all existing fleets and regroup the assets from scratch. Please note that you will lose any existing fleet data.

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

Build Revenue or Support Fleets → **Build Revenue Vehicles Fleets** / **Build Support Vehicles Fleets**

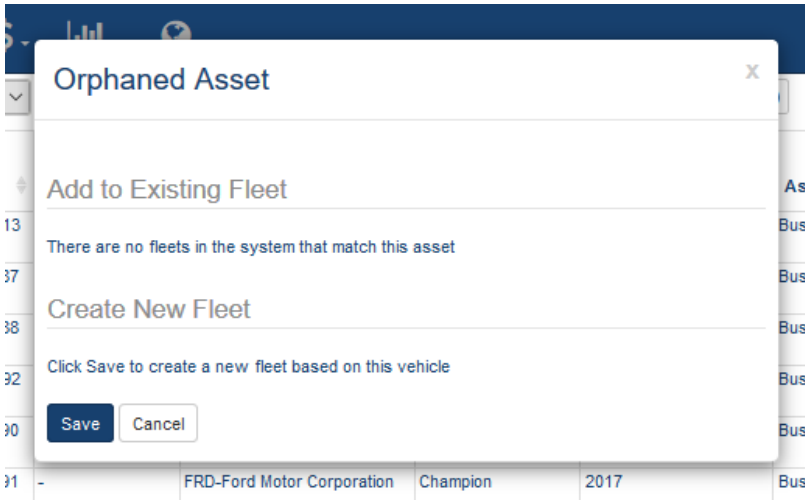
When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 93 Asset Fleet Builder—Orphaned Assets



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 94 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 95 Adding a New Fleet

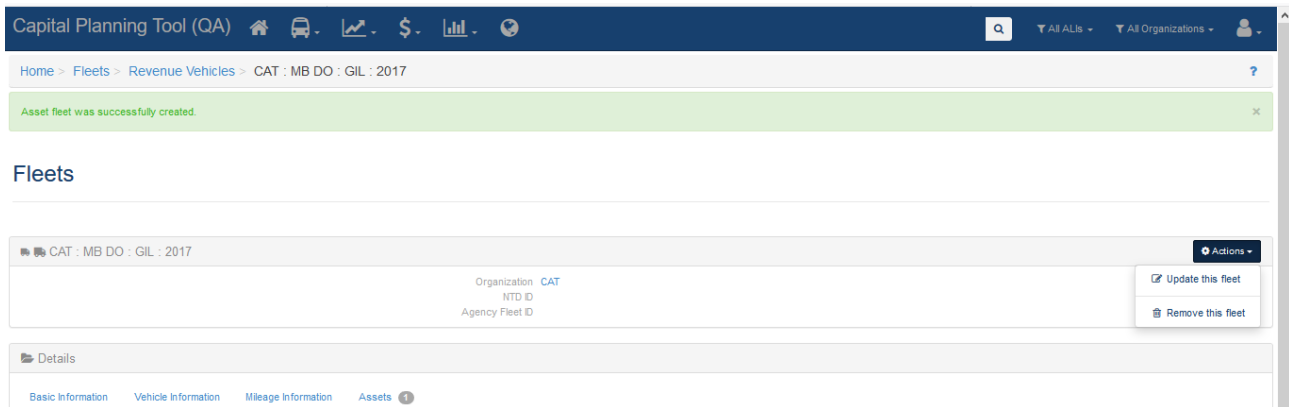


Figure 96 Update Asset Fleet Details

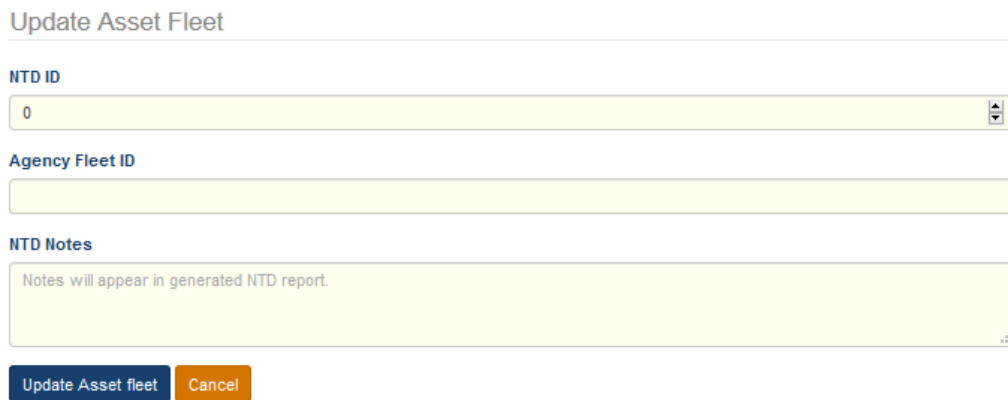


Figure 97 Update Odometer Readings

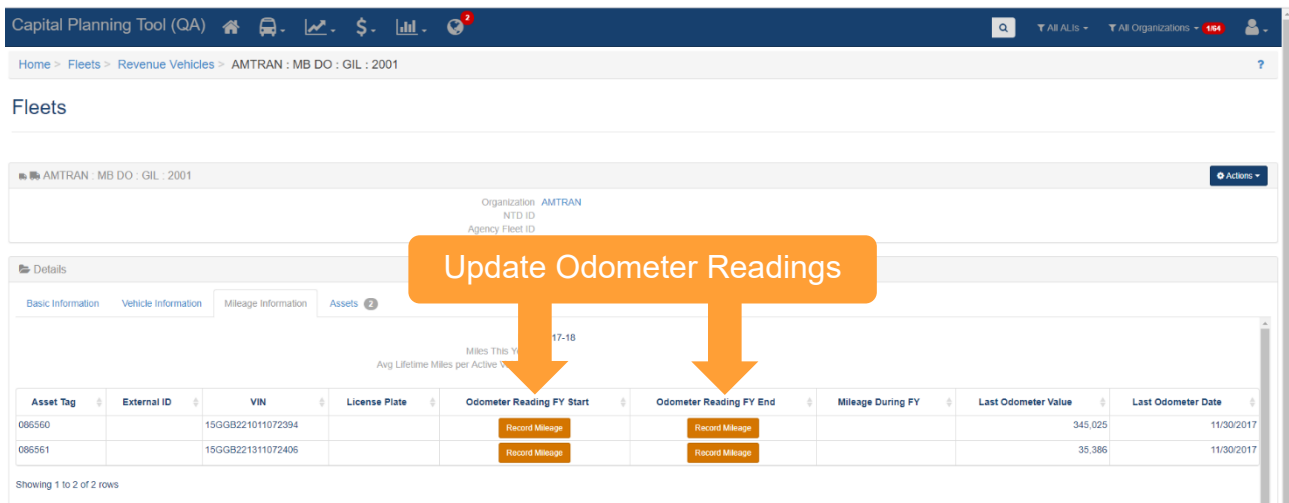


Figure 98 Remove or Add Assets from within a Fleet

The screenshot shows the 'Capital Planning Tool (QA)' interface. The breadcrumb trail is 'Home > Fleets > Revenue Vehicles > AMTRAN : MB DO : GIL : 2001'. The 'Fleets' section is active, showing details for 'AMTRAN : MB DO : GIL : 2001'. The 'Details' tab is selected, and the 'Assets' sub-tab is active. A table lists two assets:

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		345025	Yes	⊕

An orange callout box with the text 'Add or Remove Assets' and a downward arrow points to the 'Action' column of the table.

9.2 NTD Asset Reports

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

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

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

Figure 99 Access NTD Reports

The screenshot shows the Capital Planning Tool (QA) interface. The top navigation bar includes icons for Home, a vehicle, a line graph, a dollar sign, a bar chart, and a notification bell. The main content area is divided into sections: 'Home' with an 'Asset Summary' table, 'My Tasks' (showing 'No tasks'), and 'My Notices' (showing three notifications). A dropdown menu is open over the 'NTD Reporting' option, which is highlighted by an orange arrow labeled '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 100 Table of Previously Generated NTD Reports

The screenshot shows the 'NTD Reporting' page in the Capital Planning Tool (QA). At the top, there is a '+ New NTD Form' button and a 'FY 16-17' dropdown menu. Below this is a table with the following columns: Organization, Fiscal Year, Status, Created At, and Creator. The table contains one row for 'CARBON' with a status of 'Unsubmitted' and a creation time of '10:41 AM 10/19/2018'. An orange arrow points to the '+ New NTD Form' button with the label 'Create New NTD Forms'. Another orange arrow points to the 'CARBON' row with the label 'Click to Access Existing Forms'.

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 101 Create New Reporting Year Forms

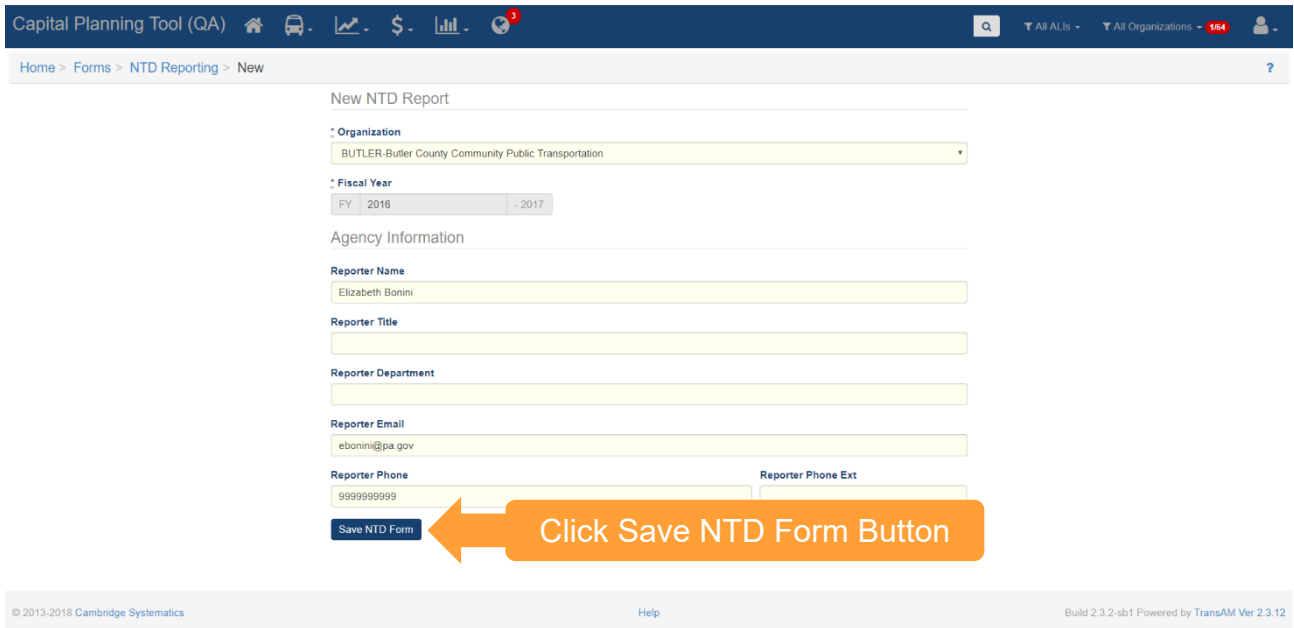
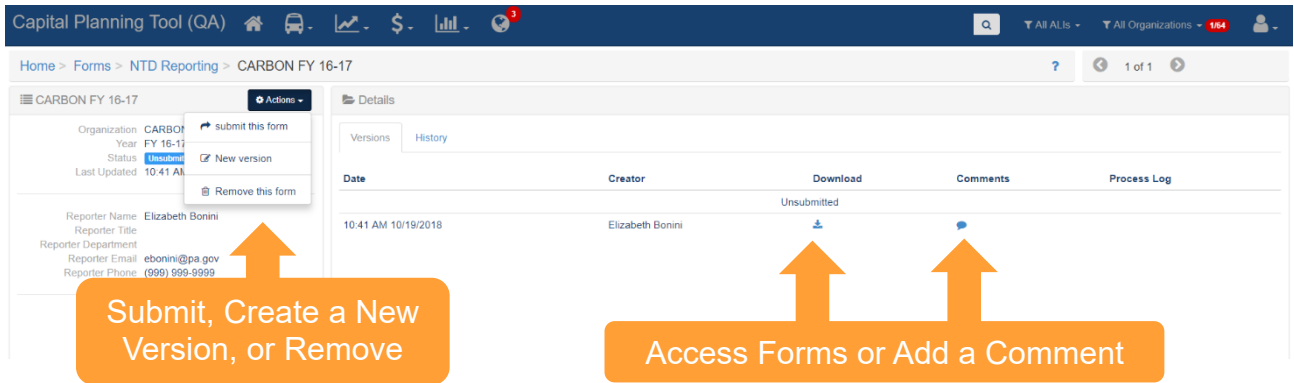


Figure 102 NTD Report Details and Data



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 103 Download each NTD Form

