

Capital Planning Tool (CPT)

General User

User Guide

prepared for

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

prepared by

Cambridge Systematics, Inc.

user guide

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1.0 Welcome!

The PennDOT Capital Planning Tool (CPT) is an asset management system designed to support the needs of PennDOT's Bureau of Public Transportation (BPT) and the many transit agencies that operate in the Commonwealth. The system manages assets of all types, including revenue vehicles, equipment, facilities, and infrastructure. The system stores crucial information about every asset category and maintains a complete history of the asset as it ages, including; changes in condition, usage, value/depreciation, and other lifecycle events are, that are recorded and can be reviewed at any time. A variety of reports can be generated on asset condition, value, and capital replacement needs.

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

1.1 Initial Log In and Password Reset

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

Figure 1 Password Reset Request Screen

Capital Planning Tool (QA)

Instructions

Enter your email address that you use to login to TransAM and click the button. If your email address is found in the system you will get an email with instructions for resetting your password. If you don't receive an email in a few minutes contact your program manager.

Forgotten Password

Email

Send me reset password instructions

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

Capital Planning Tool (QA)

Instructions

Your password must conform to the following:

- At least 8 characters
- Contain at least one upper case and one lower case letter
- Contain at least on number

Change Your Password

New password

Confirm your new password

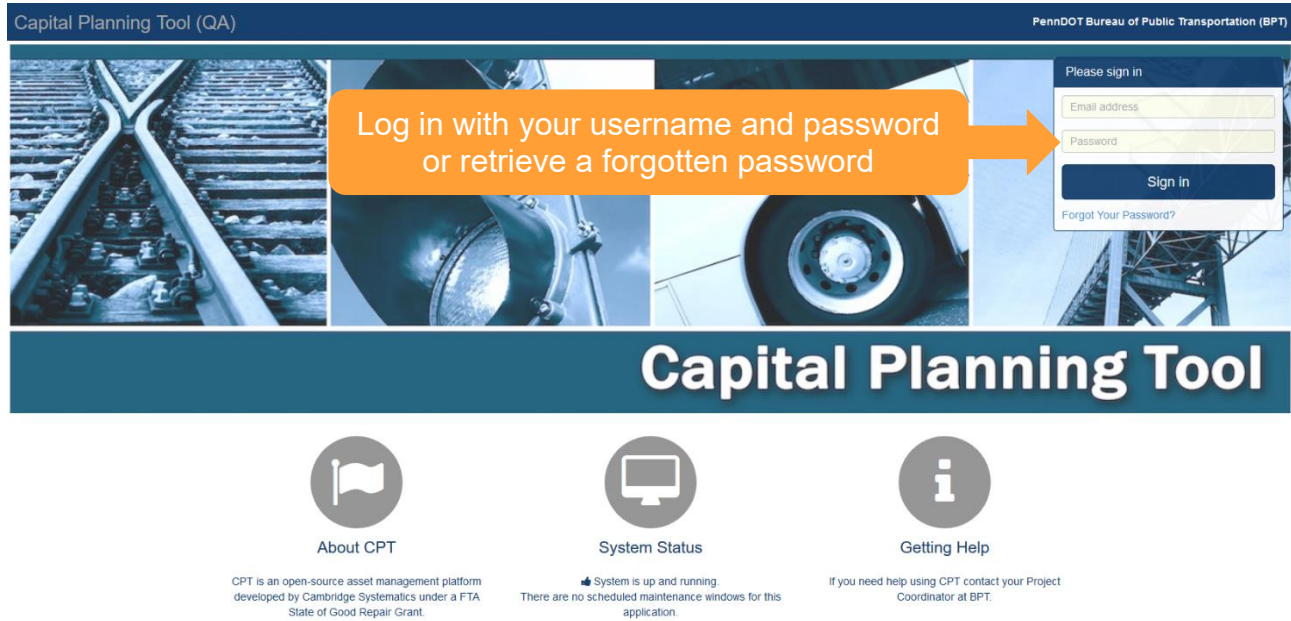
Change my password

1.2 Ongoing Site Access

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

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

Figure 3 Login Screen



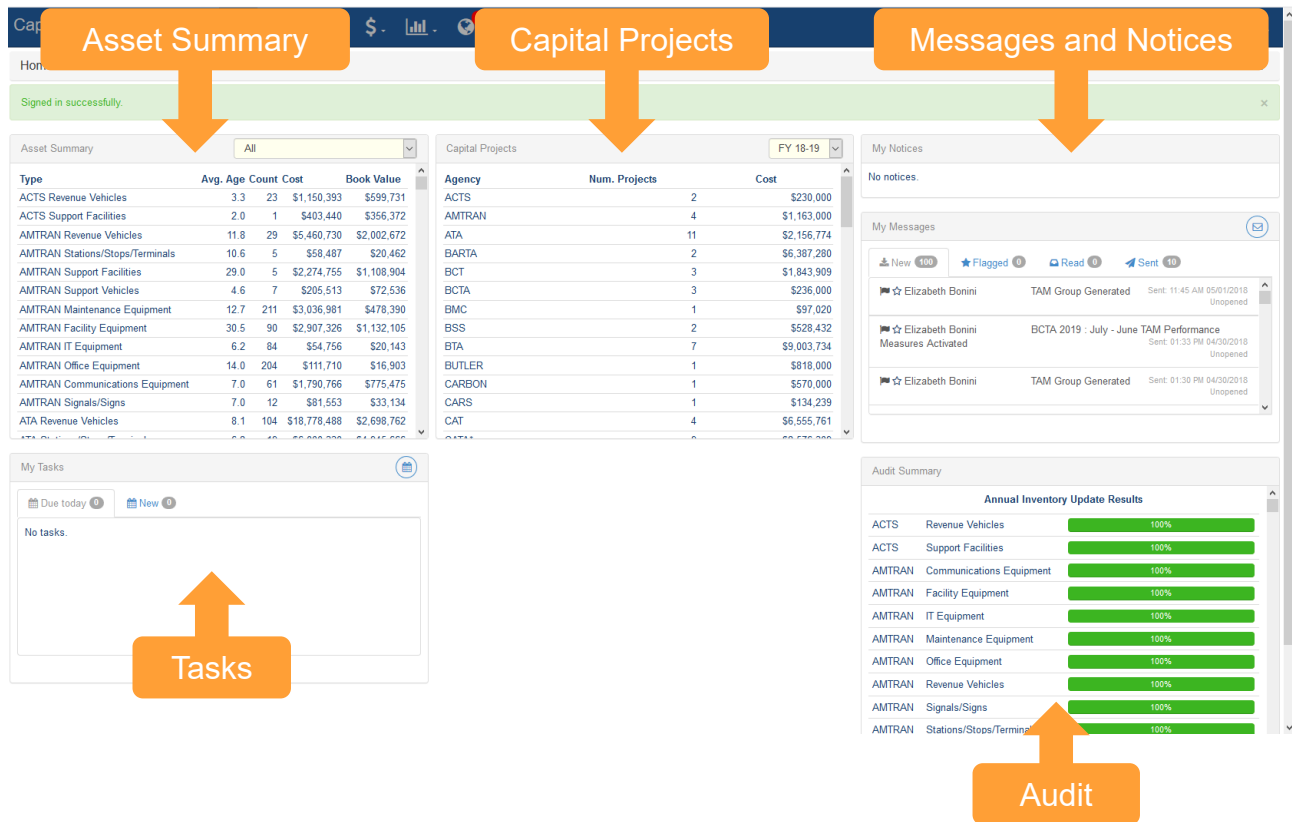
2.0 Dashboard

2.1 Dashboard Elements

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

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

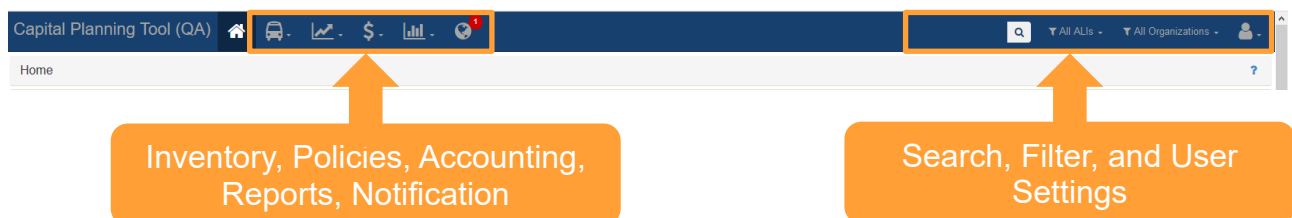
Figure 4 Dashboard Elements



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.

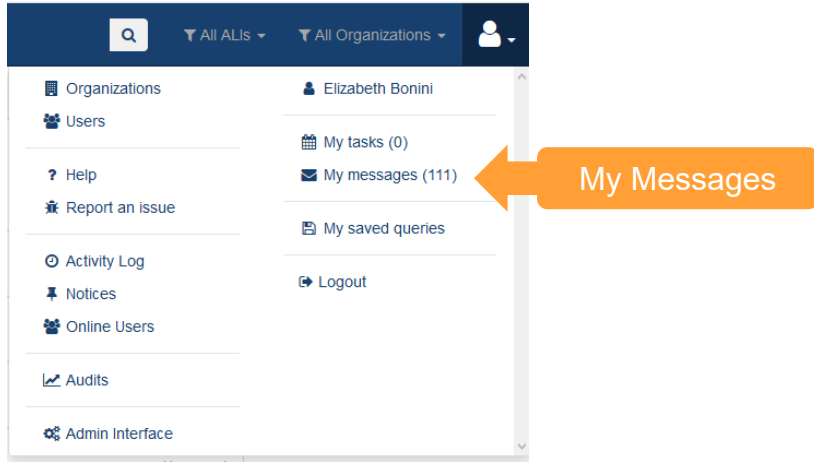
Figure 9 **Filter Icon**



3.3 Messages

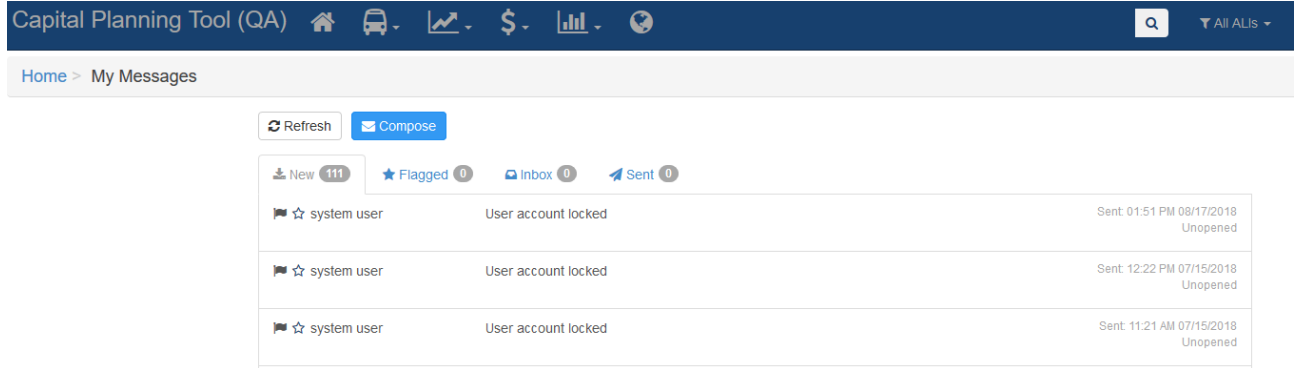
You can access Messages through the User Profile drop down menu.

Figure 10 User Profile
Messages

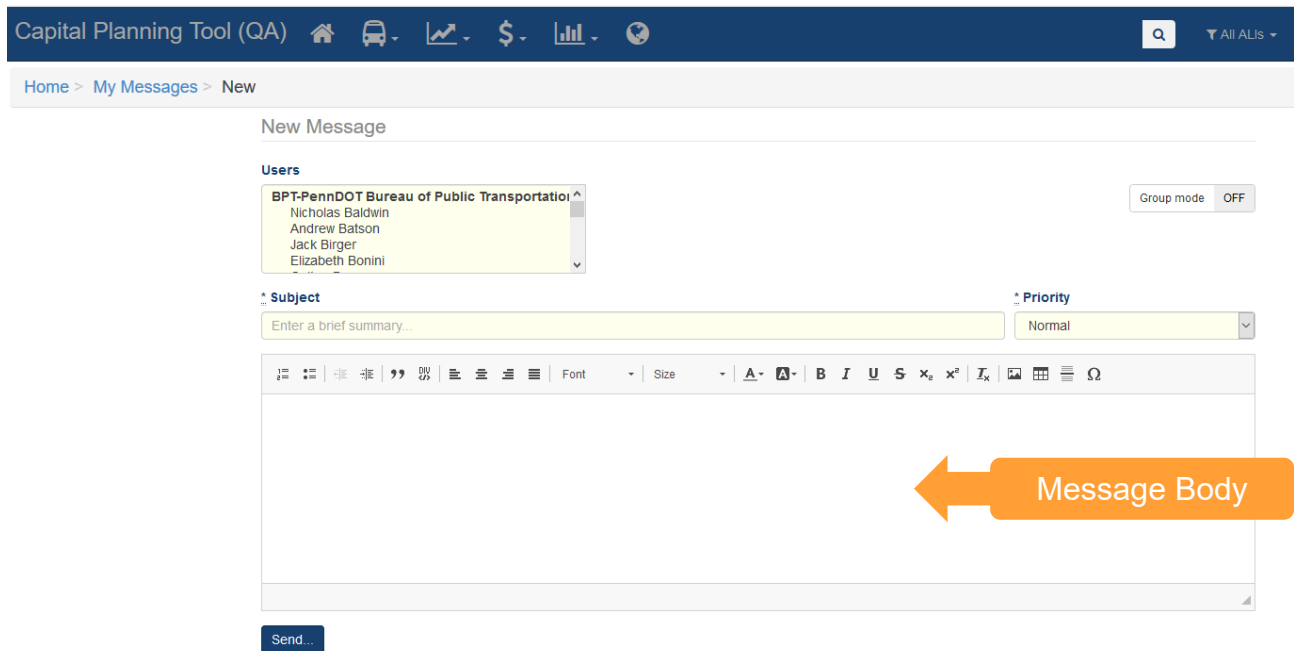


Users are able to send and receive messages to one or more users through the interface.

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.

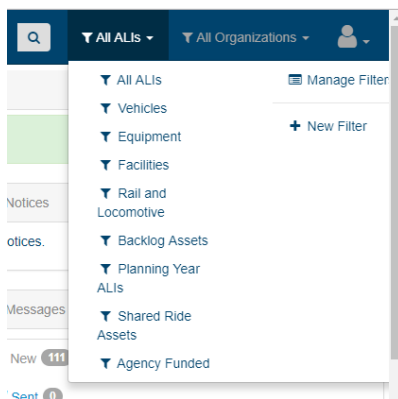
Figure 12 Message Interface

3.4 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

Capital Planning Tool (QA) Home Bus Chart Dollar Bar Chart Refresh

Home > ALI Filters > New

Details

* **Name**
Enter a name for this filter

* **Description**
Enter a description for this filter

* **Shared With**
 No One
 BPT
 All Organizations

Parameters

Type
[Dropdown]

SOGR
All [Dropdown]

Scope
[Dropdown]

Project Location
[Dropdown]

Asset Type [Dropdown] **Asset Subtype** [Dropdown]

In Backlog

Owner [Dropdown] **Funding** [Dropdown]

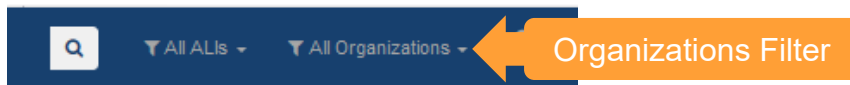
Not fully funded

Update ALI Filter Update and Select This Filter

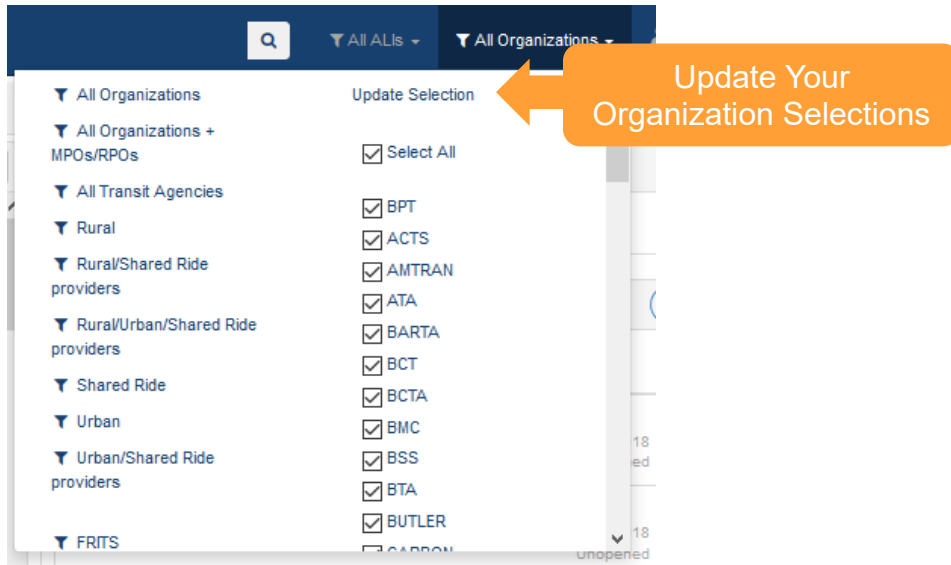
3.5 Organizations Filter

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

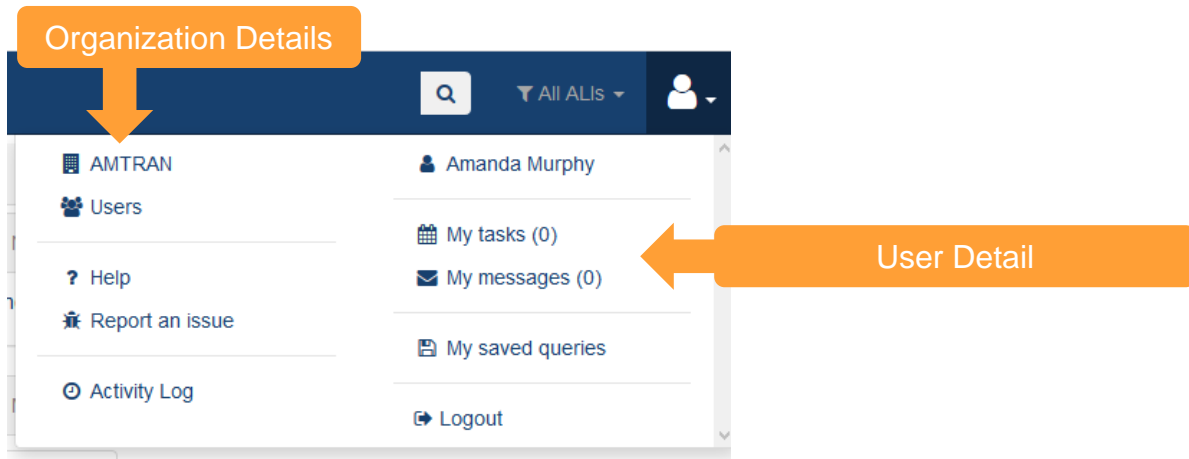
3.7 User and Organization Options

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

Figure 19 User Menu

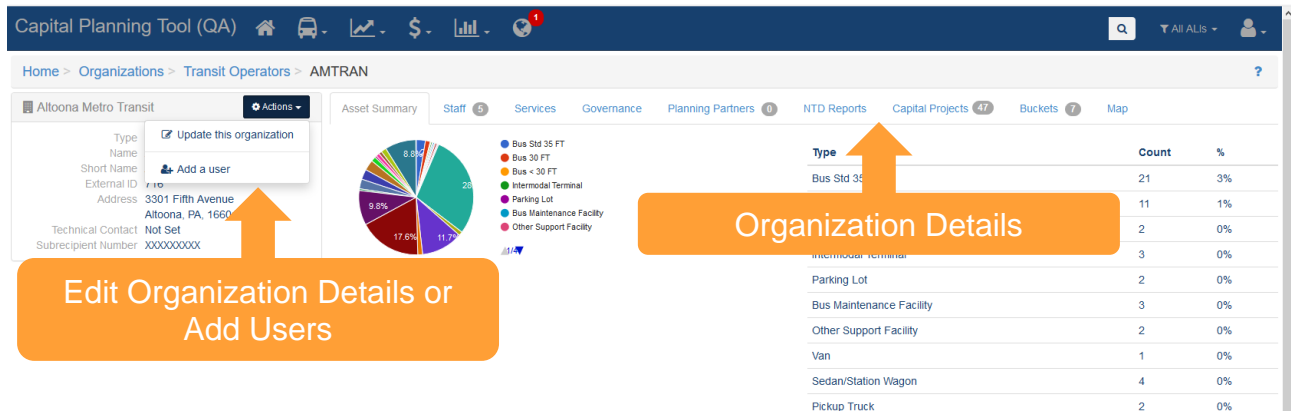
From here, users can explore information about their own organization and their coworkers in the Organization and Users section.

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

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

* Comments

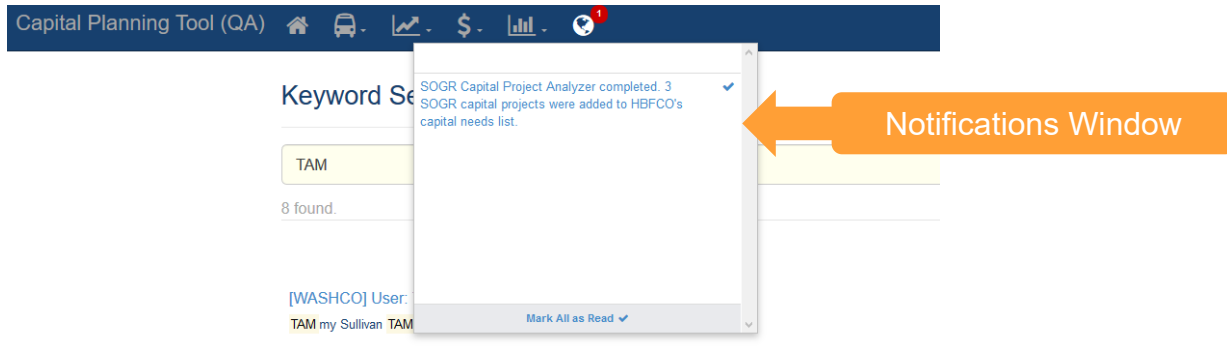
Please provide as much detail as you can...

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.

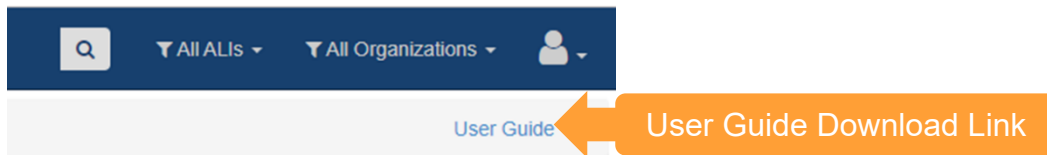
Figure 24 Notification Drawer



3.9 Help

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

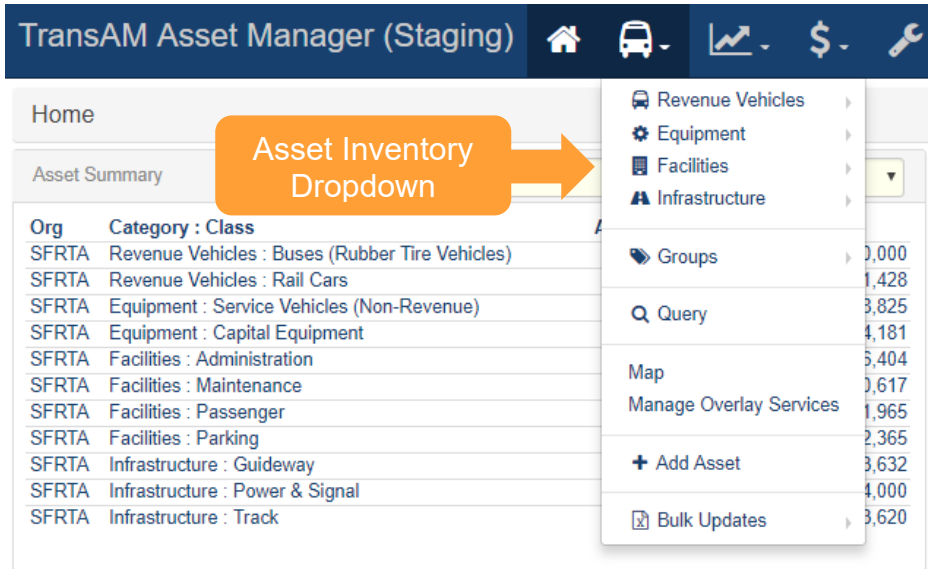
Figure 25 User Guide



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.

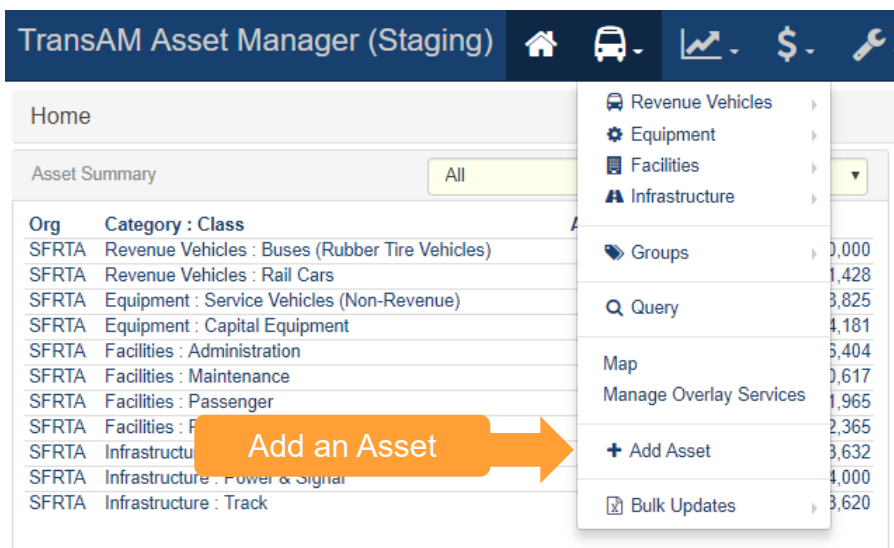
Figure 26 Asset Inventory Dropdown



4.1 Add an Asset

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

Figure 27 Adding an Asset



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

Figure 28 Select the Organization and Asset Class

Capital Planning Tool (QA) Home Add Asset

New Asset

* Organization
Select organization...

* FTA Asset Class
Select asset class...

Create New Asset

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

Figure 29 Adding Asset Required Details

Capital Planning Tool (QA) Home Add Asset

Home

Required Fields Recommended Fields

Organization

* Organization
Altoona Metro Transit

Service Status

* Service Status

Identification & Classification

* Vehicle Identification Number (VIN)

* Asset ID

* Class
Buses (Rubber Tire Vehicles)

* Type

* Subtype

* Estimated Service Life (ESL) Category

Characteristics

* Manufacturer

Manufacturer (Other)

* Model

Model (Other)

* Year of Manufacture

* Fuel Type

Fuel Type (Other)

Dual Fuel Type

* Length Length Units

* Seating Capacity (ambulatory)

Any field on the required tab must be filled out

Figure 30 Add the Asset and Go To The New Record

The screenshot displays the Capital Planning Tool (CPT) interface. The top navigation bar includes the title 'Capital Planning Tool (QA)' and various icons. The main content area is a form with several sections:

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

At the bottom left of the form, there is a blue button 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 31 Existing Assets

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

Figure 32 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	1FDFE4FS6HDC18987	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Maintenance history	10/2/2018
#272	CAT	1FDFE4FS8HDC18988	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#273	CAT	1FDFE4FSXHDC18992	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#274	CAT	1FDFE4FS6HDC18990	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#275	CAT	1FDFE4FS8HDC18991	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#276	CAT	1FDFE4FSXHDC18989	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#277	CAT	1FDFE4FS1HDC18993	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#278	CAT	1FDFE4FS3HDC18994	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#279	CAT	1FDFE4FS5HDC18995	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#280	CAT	1FDFE4FS7HDC18996	FRD - Ford Motor Corporation	Champion	2015	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#281	CAT	1FDFE4FS9HDC18997	FRD - Ford Motor Corporation	Champion	2017	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	1/18/2018
#282	CAT	1FDFE4FS0HDC18998	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	1FDFE4FS8GDC54954	FRD - Ford Motor Corporation	Challenger	2016	Buses (Rubber Tire Vehicles)	Cutaway	Bus < 30 FT	In Service		Mileage	8/2/2018
*602	LCTA	1FDFE4FSXGDC54955	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 33 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 34 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

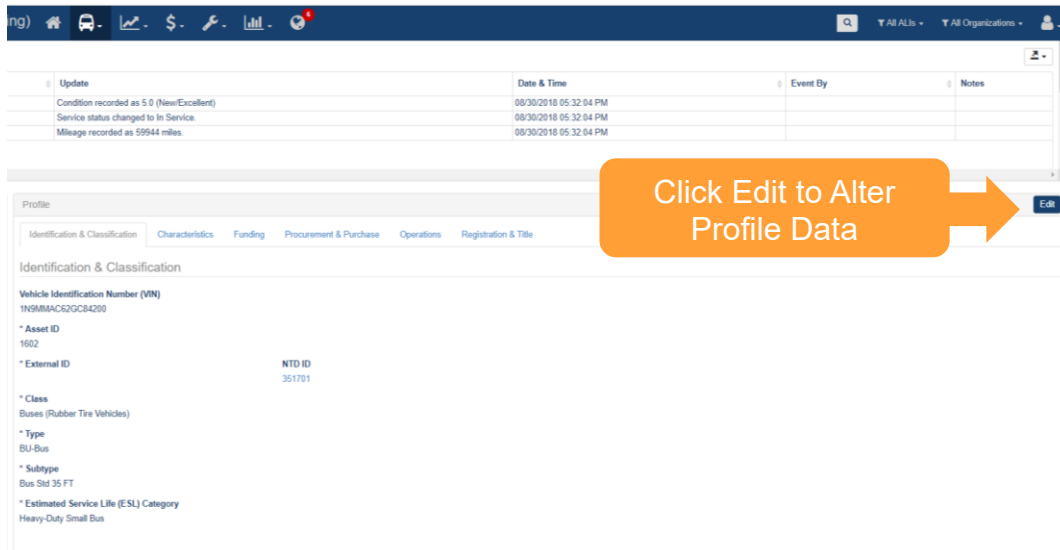
* Subtype
Bus Std 35 FT

* 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 35 Editing the Profile of an Existing Asset

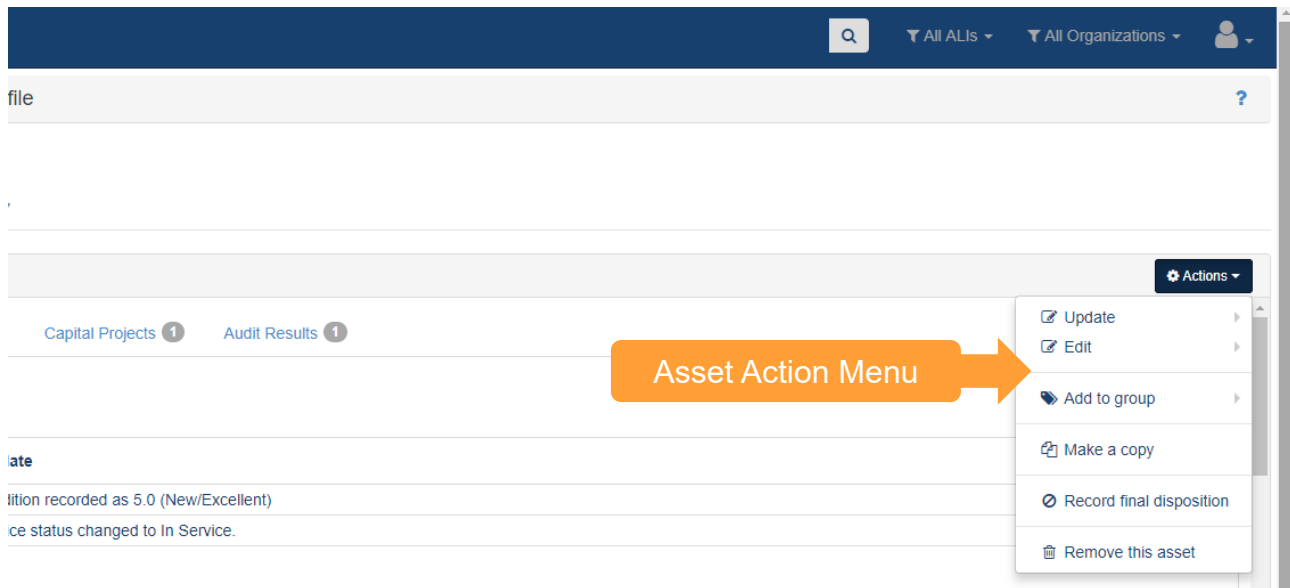


4.4 Updating Existing Asset Lifecycle Data

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.

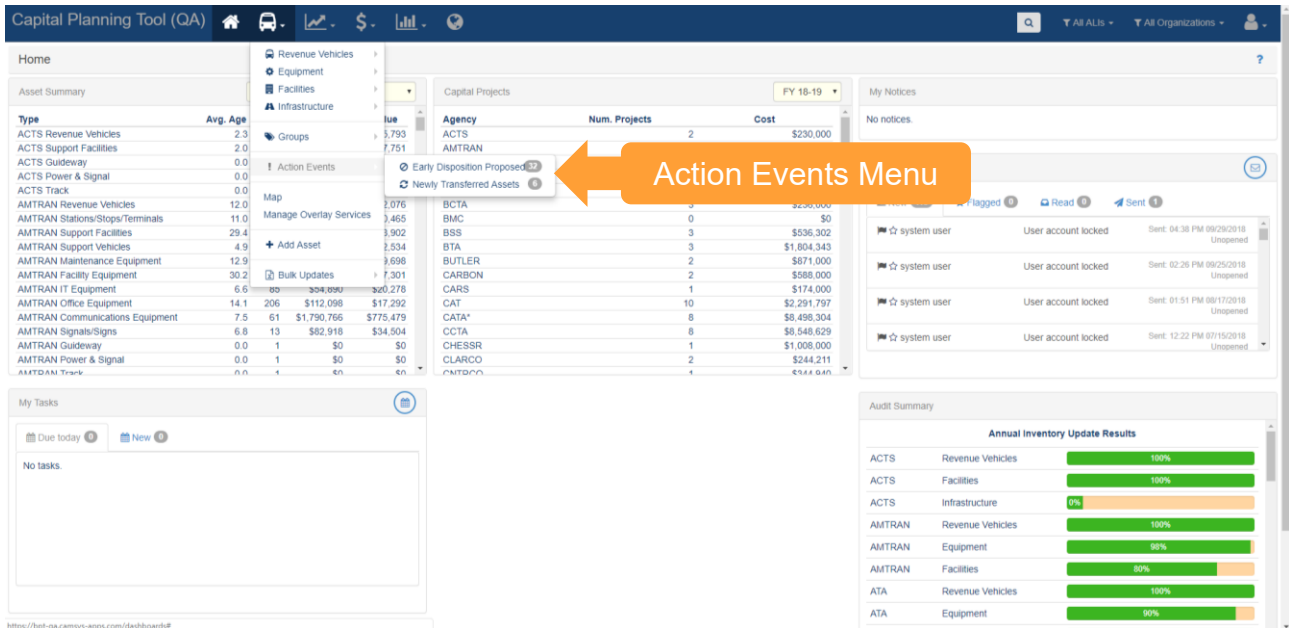
Figure 36 Updating the Lifecycle of an Existing Asset

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 37 Asset Action Events (Disposition and Transfer)

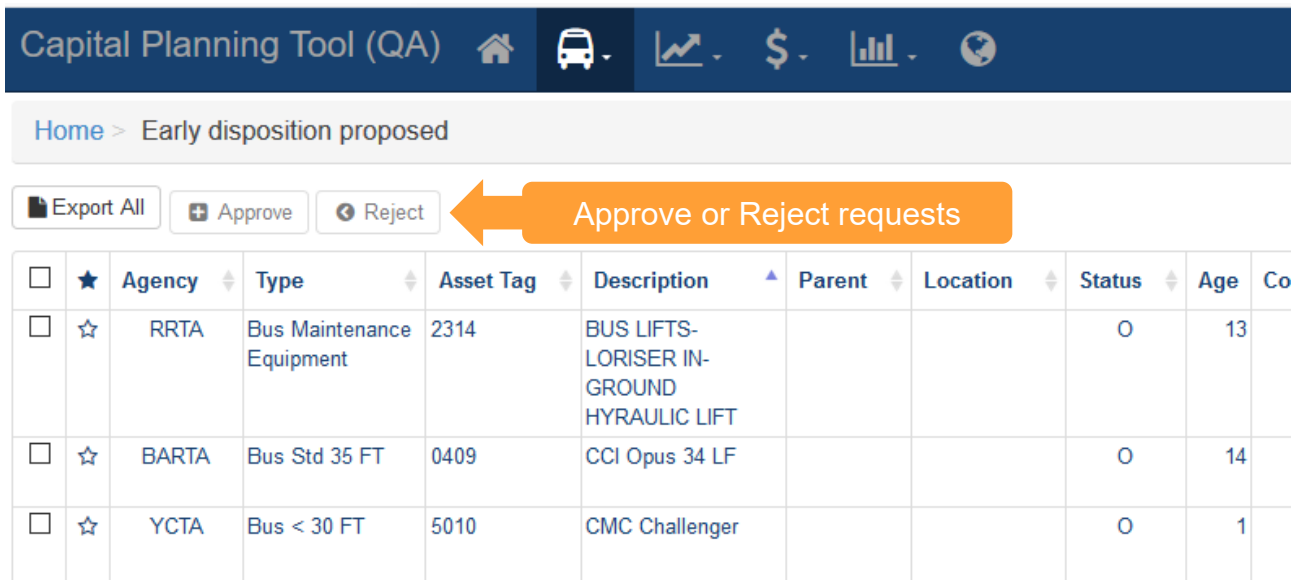


An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

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 select the button to Approve or Reject a proposed early disposition.

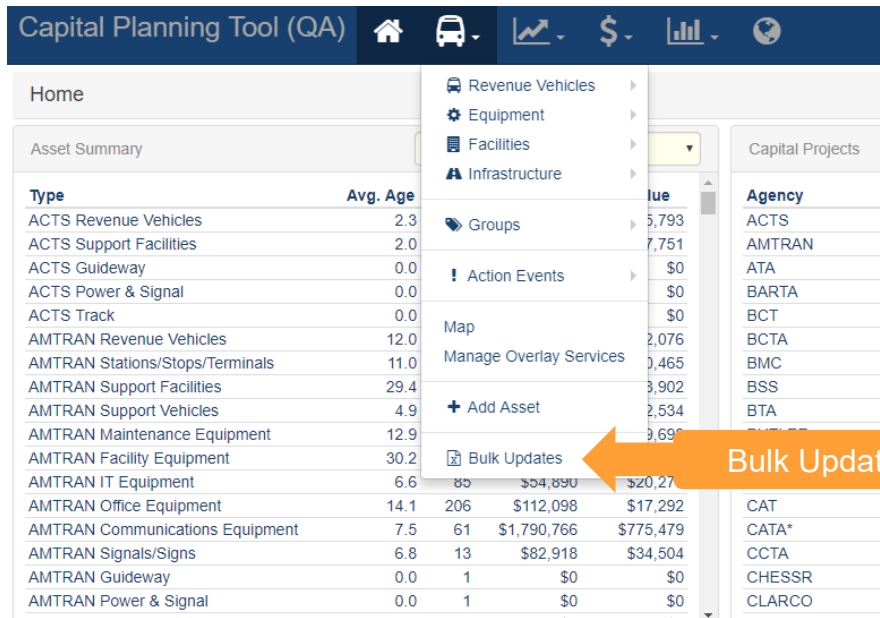
Figure 38 Early Disposition Requests



4.6 Adding or Updating Assets by Bulk Update

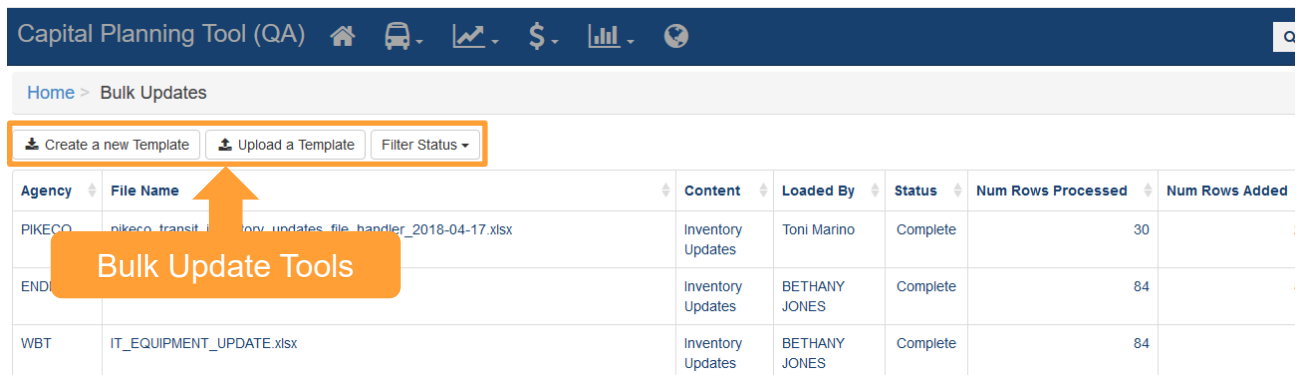
Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be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

Figure 39 Bulk Updates



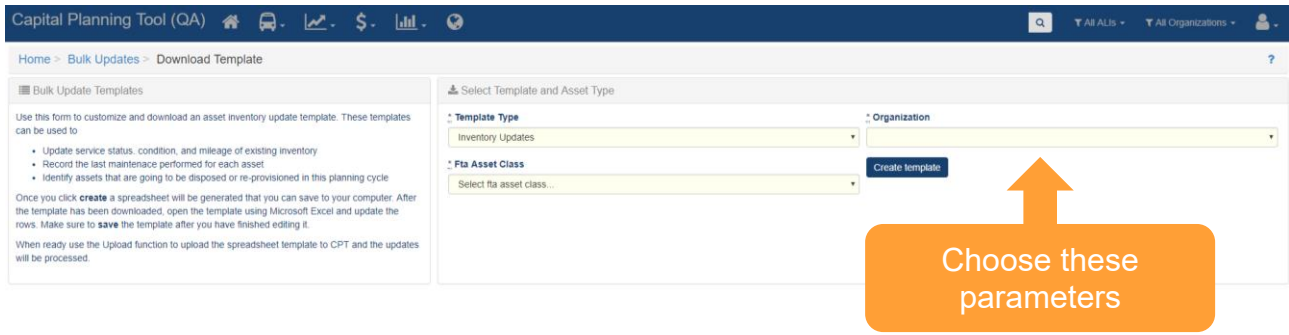
Selecting “Bulk Updates” allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

Figure 40 Bulk Update Tools



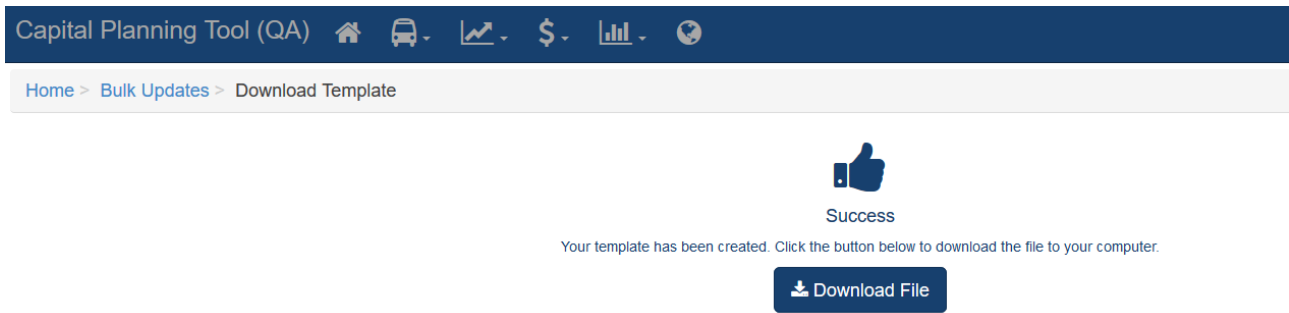
The first step to a bulk update is Creating a Template. Click “Create a new Template”, then select your Template Type, Organization, and Asset Class, then select “Create Template.”

Figure 41 Bulk Update Details



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

Figure 42 Bulk Update Spreadsheet Download



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

Figure 43 Bulk Update Spreadsheet

#	Asset	Object Key	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	Asset																	
2	Object Key	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	
3	AZE18G2848EM	ATA	703		Buses (Rubber Tire Vehicles)	Bus	Bus 30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020684	In Service		01/23/2018			1.00	01	
4	AZE18G2848EM	ATA	704		Buses (Rubber Tire Vehicles)	Bus	Bus 30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020685	In Service		01/23/2018			1.00	01	
5	AZE18G3G88A	ATA	705		Buses (Rubber Tire Vehicles)	Bus	Bus 30 FT	Heavy-Duty Large Bus	NFA D30LF	5FYD1T08YU020686	In Service		01/23/2018			1.00	01	
6	AZE18G473GA4	ATA	706		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090105	In Service		01/23/2018			1.00	01	
7	AZE18G4M4FE	ATA	707		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090106	In Service		01/23/2018			2.00	01	
8	AZE18G5E6G2	ATA	708		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090107	In Service		01/23/2018			2.00	01	
9	AZE18G65DCK	ATA	709		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090108	In Service		01/23/2018			2.00	01	
10	AZE18G69LBE	ATA	710		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090109	In Service		01/23/2018			2.00	01	
11	AZE18G79LH24	ATA	711		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE29151090110	In Service		01/23/2018			2.00	01	
12	AZE18G80GN8	ATA	712		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271981091505	In Service		01/23/2018			2.00	01	
13	AZE18G8E1G6	ATA	713		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091506	In Service		01/23/2018			2.00	01	
14	AZE18G915GC	ATA	714		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091507	In Service		01/23/2018			2.00	01	
15	AZE18G95FM0	ATA	715		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091508	In Service		01/23/2018			2.00	01	
16	AZE18GAA1M54	ATA	716		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091509	In Service		01/23/2018			2.00	01	
17	AZE18G80HD9C	ATA	717		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091510	In Service		01/23/2018			2.00	01	
18	AZE18G8MK0M	ATA	718		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091511	In Service		01/23/2018			2.00	01	
19	AZE18G0C8614	ATA	719		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091512	In Service		01/23/2018			2.00	01	
20	AZE18G0LKL2	ATA	720		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271991091652	In Service		01/23/2018			2.00	01	
21	AZE18G897DK	ATA	721		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091653	In Service		01/23/2018			2.00	01	
22	AZE18G07EKK	ATA	722		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271291091654	In Service		01/23/2018			2.00	01	
23	AZE18G07ECC	ATA	723		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091655	In Service		01/23/2018			2.00	01	
24	AZE18G0F4C00	ATA	724		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091656	In Service		01/23/2018			2.00	01	
25	AZE18G0FNS4	ATA	725		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091657	In Service		01/23/2018			2.00	01	
26	AZE18G0G0K40	ATA	726		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091658	In Service		01/23/2018			2.00	01	
27	AZE18G0G3G3G	ATA	727		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE27191091659	In Service		01/23/2018			2.00	01	
28	AZE18G8HAI80	ATA	728		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091660	In Service		01/23/2018			2.00	01	
29	AZE18G8HKA070	ATA	729		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE271881091661	In Service		01/23/2018			2.00	01	
30	AZE18G8A78K	ATA	730		Buses (Rubber Tire Vehicles)	Bus	Bus < 30 FT	Heavy-Duty Large Bus	GIL Gillig 29LF	1GGE27191091662	In Service		01/23/2018			2.00	01	
31	AZE18G8N9GM	ATA	750		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB29185111645	In Service		01/23/2018			2.00	01	
32	AZE18G8C7CKI	ATA	751		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB29185111646	In Service		01/23/2018			2.00	01	
33	AZE18G8K1M4N8	ATA	752		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB29185111647	In Service		01/23/2018			2.00	01	
34	AZE18G8G7F2A	ATA	753		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Phantom	15GCB29185111648	In Service		01/23/2018			2.00	01	
35	AZE18G8LKL44	ATA	754		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079688	In Service		01/23/2018			2.00	01	
36	AZE18G8LJHAE	ATA	755		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079689	In Service		01/23/2018			2.00	01	
37	AZE18G8M8R9W	ATA	756		Buses (Rubber Tire Vehicles)	Bus	Bus Std 35 FT	Heavy-Duty Large Bus	GIL Gillig 35'	15GGB27191079690	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 44 Bulk Update Upload

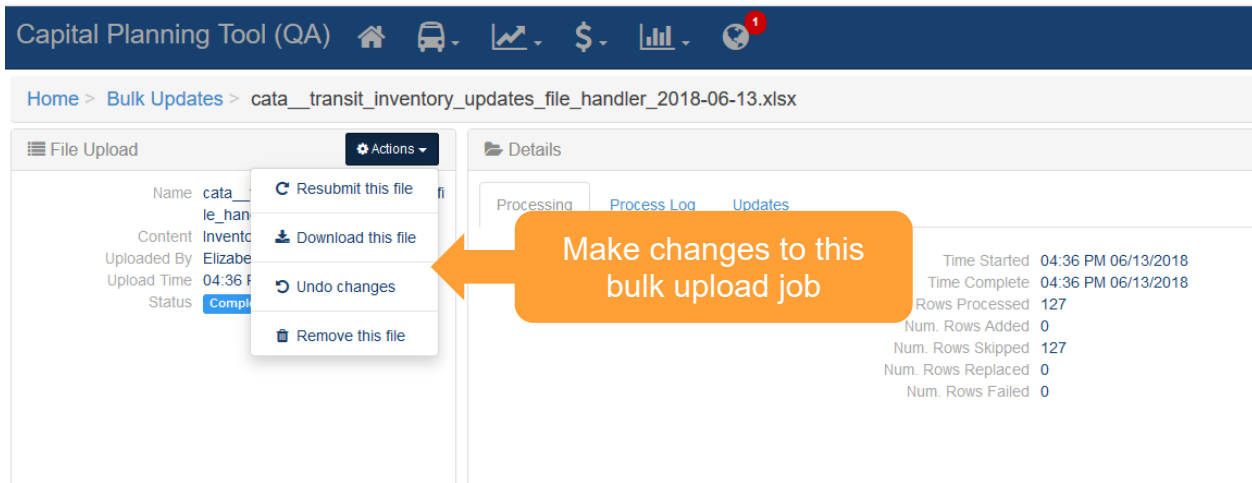
If your file uploads successfully, the main Bulk Update screen should reappear with a “File was successfully uploaded banner” and you should see the most recent update appear at the top of the bulk update history. The system will perform the updates and a new notification will appear in your notification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

Figure 45 Bulk Upload Processing

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

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

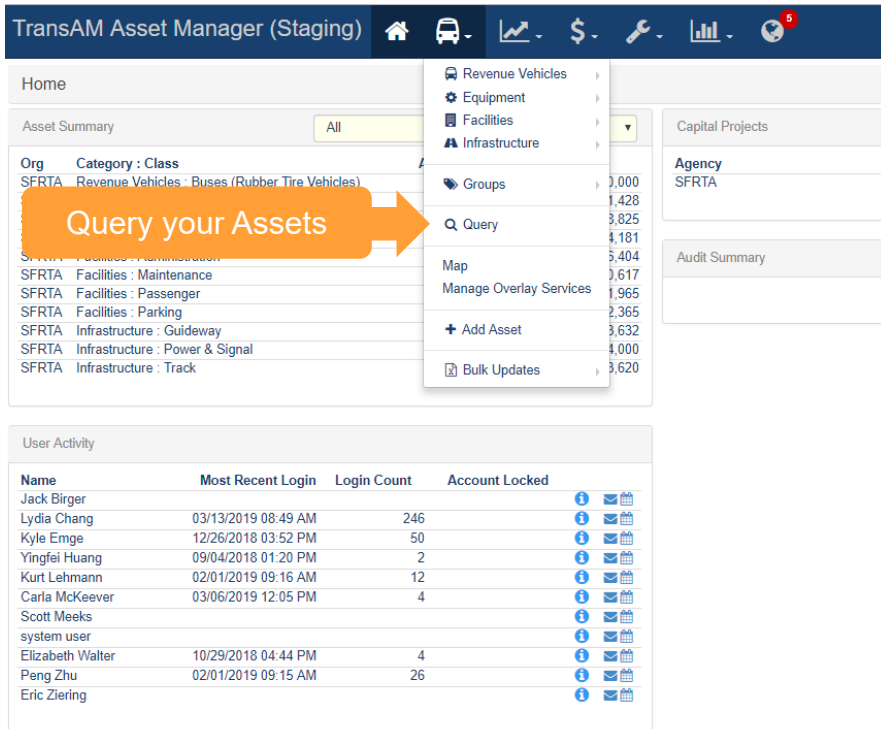
Figure 46 Bulk Update Edit



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.

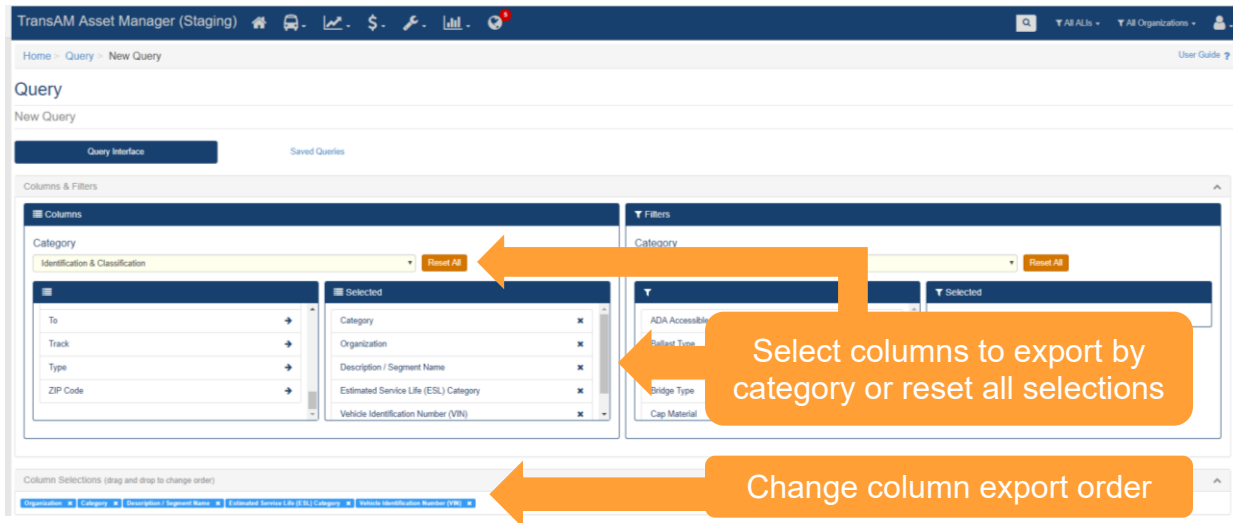
Figure 47 Asset Query



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

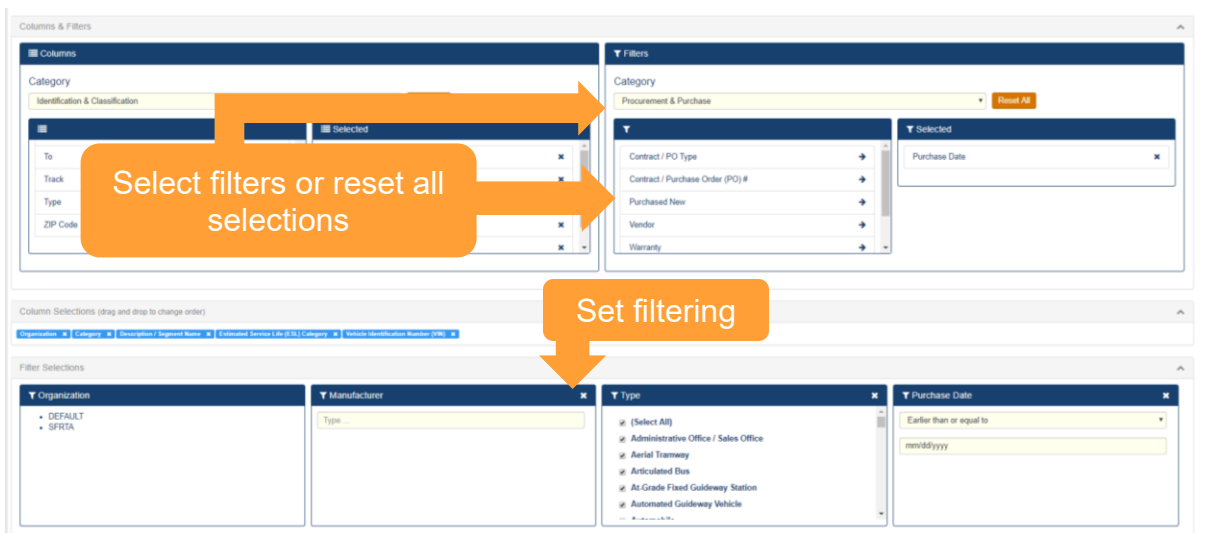
“x” of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

Figure 48 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.

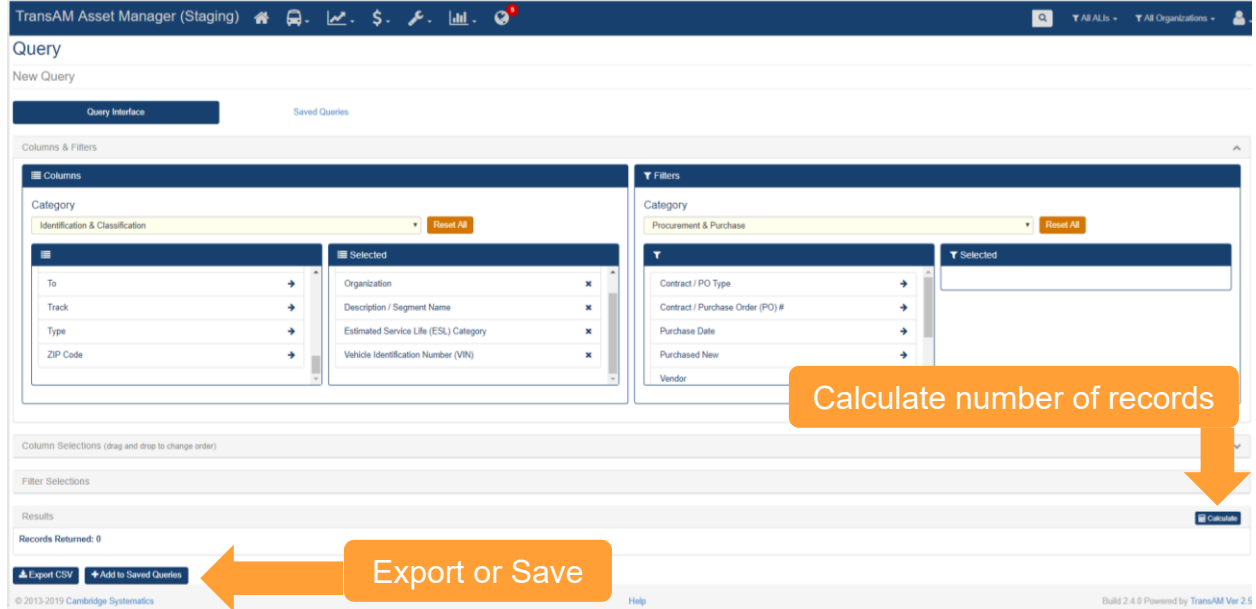
Figure 49 Filter Selection



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.

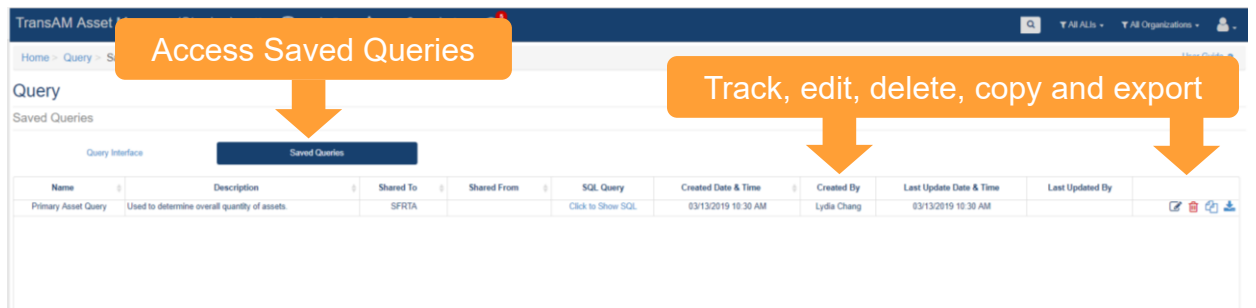
Figure 50 Calculate, Export or Save



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 51 Saved Queries



4.8 Map

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

Figure 52 Asset Map

The screenshot shows the Capital Planning Tool (QA) interface. A dropdown menu is open, highlighting the 'Map' option. An orange callout box with an arrow points to this option, containing the text 'Map your Assets'. Below the menu is a table with asset data.

Type	Avg. Age	Count	Value	Agency
ACTS Revenue Vehicles	2.3	5,793		ACTS
ACTS Support Facilities	2.0	7,751		AMTRAN
ACTS Guideway	0.0	\$0		ATA
ACTS Power & Signal	0.0	\$0		BARTA
ACTS Track	0.0	\$0		
AMTRAN Revenue Vehicles	12.0	0,485		BMC
AMTRAN Stations/Stops/Terminals	11.0	3,902		BSS
AMTRAN Support Facilities	29.4	2,534		BTA
AMTRAN Support Vehicles	4.9	9,698		BUTLER
AMTRAN Maintenance Equipment	12.9	7,301		CARBON
AMTRAN Facility Equipment	30.2	85	\$54,890	CARS
AMTRAN IT Equipment	6.6	206	\$112,098	CAT
AMTRAN Office Equipment	14.1	61	\$1,790,766	CATA*
AMTRAN Communications Equipment	7.5		\$775,479	

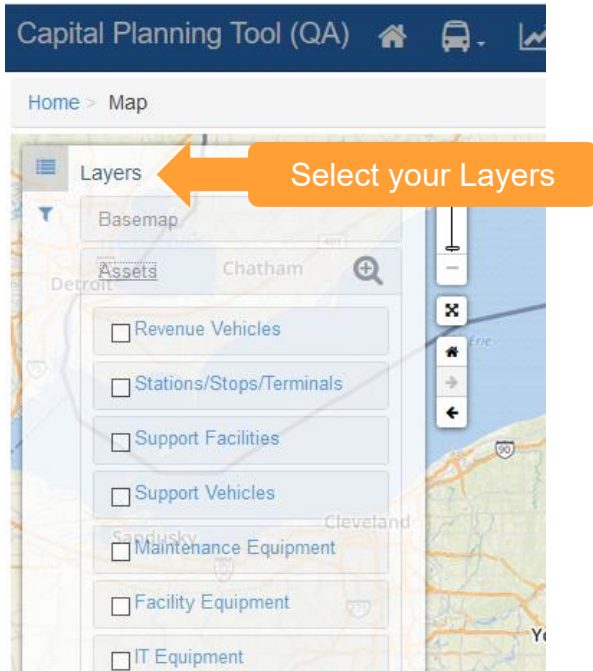
The map has several key features. You can customize the map from the two icons in the bar on the left of the map.

Figure 53 Map Customization

The screenshot shows the Capital Planning Tool (QA) interface with a map view. An orange callout box with an arrow points to the map customization controls on the left side of the map, containing the text 'Customize and Control the Map'. The map displays a geographical area with various cities and roads.

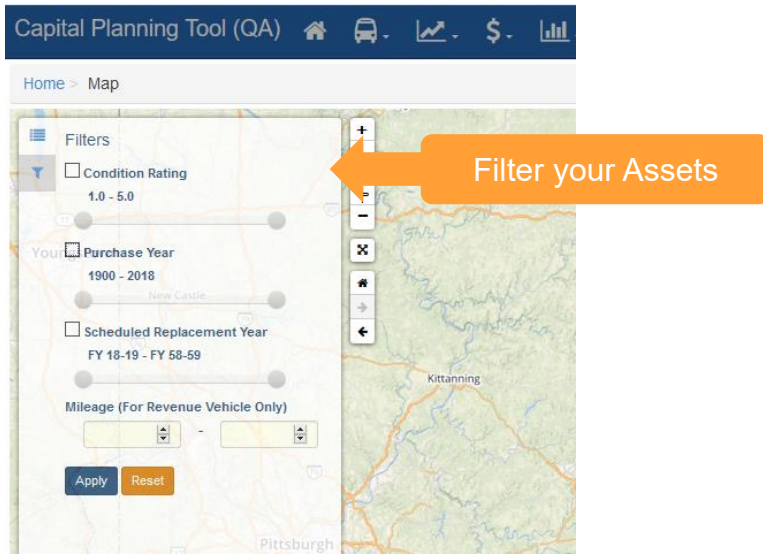
Clicking the top icon allows you to select which layers to display on the map. You can select a default map, the Esri streets map, the Esri Satellite map, or the Esri topographic map as your basemap. Clicking assets will allow you to specify which asset types you wish to display on the map.

Figure 54 Map Layers



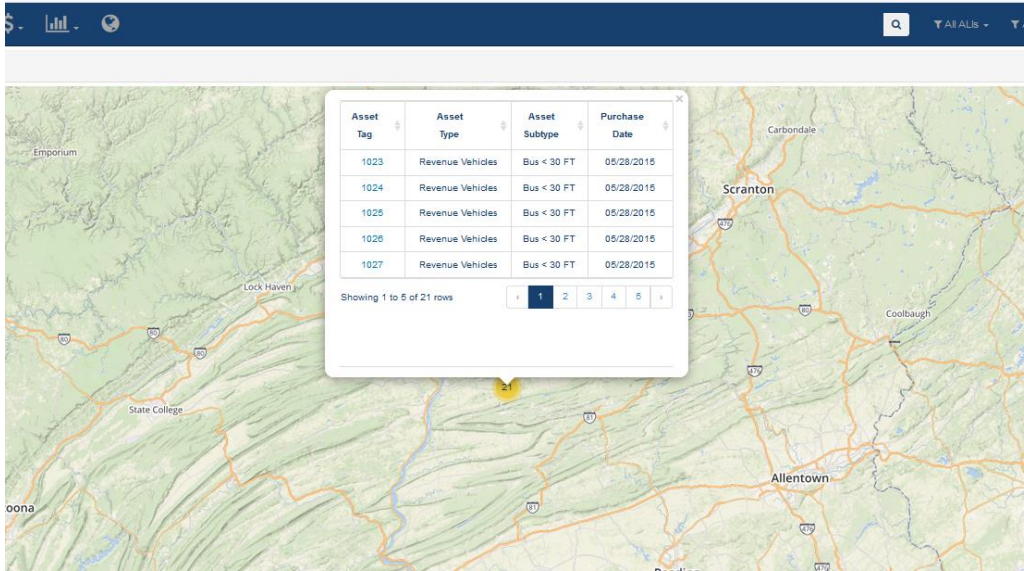
Clicking the filter icon will allow you to pare down the assets that are displayed on the map.

Figure 55 Map Filter



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

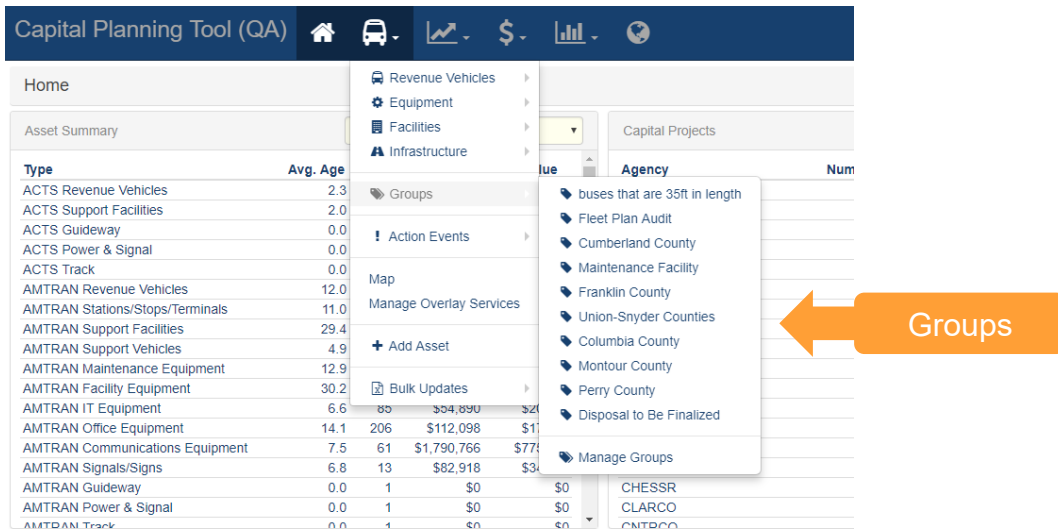
Figure 56 Map Asset Details



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 57 Asset Groups



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

Figure 58 Adding an Asset to a Group

The screenshot displays the 'Revenue Vehicle Profile' page for a specific asset. The breadcrumb trail is: Home > Revenue Vehicles > Buses (Rubber Tire Vehicles) > Buses (Rubber Tire Vehicles) Profile. The asset details are: CAT : 15GGB2713H3189913 : #1701 : GIL - Gillig Corporation : 35' Low Floor : 2017.

The 'Highlights' section contains a table of events:

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

An orange arrow labeled 'Add an Asset to a Group' points to a dropdown menu that is open, showing the option 'Add to group' selected. Other options in the menu include Update, Edit, Make a copy, Record final disposition, and Remove this asset.

The 'Asset Summary' section on the left provides a profile overview:

- Owner: CAT
- Description: GIL 35' Low Floor
- Asset Tag: #1701
- External ID: [blank]
- Manufacturer: GIL
- Class: Revenue Vehicles
- Type: Bus Std 35 FT
- Status: In Service
- Age: 0 yrs
- Mileage: [blank]

The 'Profile' section on the right shows the 'Identification & Classification' tab with the following details:

- Vehicle Identification Number (VIN): 15GGB2713H3189913
- * Asset ID: #1701
- External ID: [blank]
- NTD ID: [blank]

The URL at the bottom of the page is: https://cpt-qa.camsys-apps.com/inventory/AZE1DU868EF

5.0 Maintenance

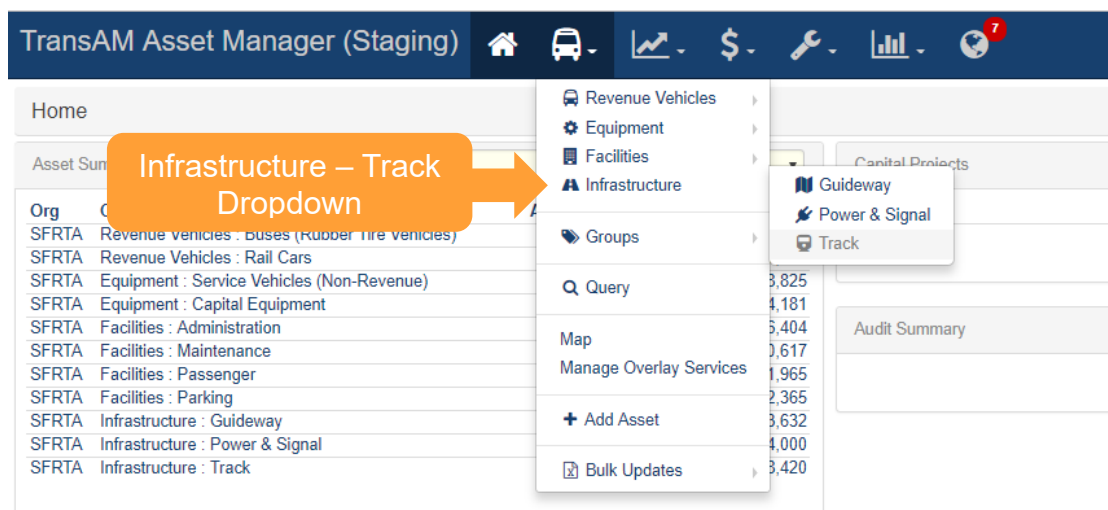
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

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 59 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 60 Existing Asset Interface : Infrastructure - Track

Infrastructure
All Track

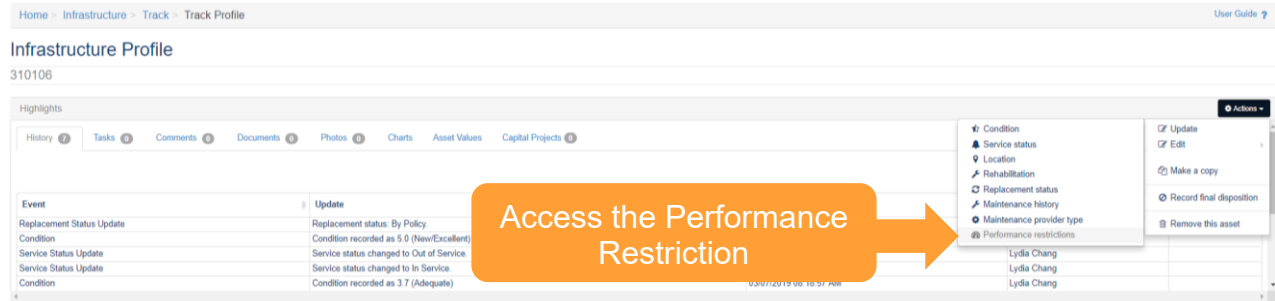
Export All

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

Showing 1 to 10 of 275 rows | 10 rows per page

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

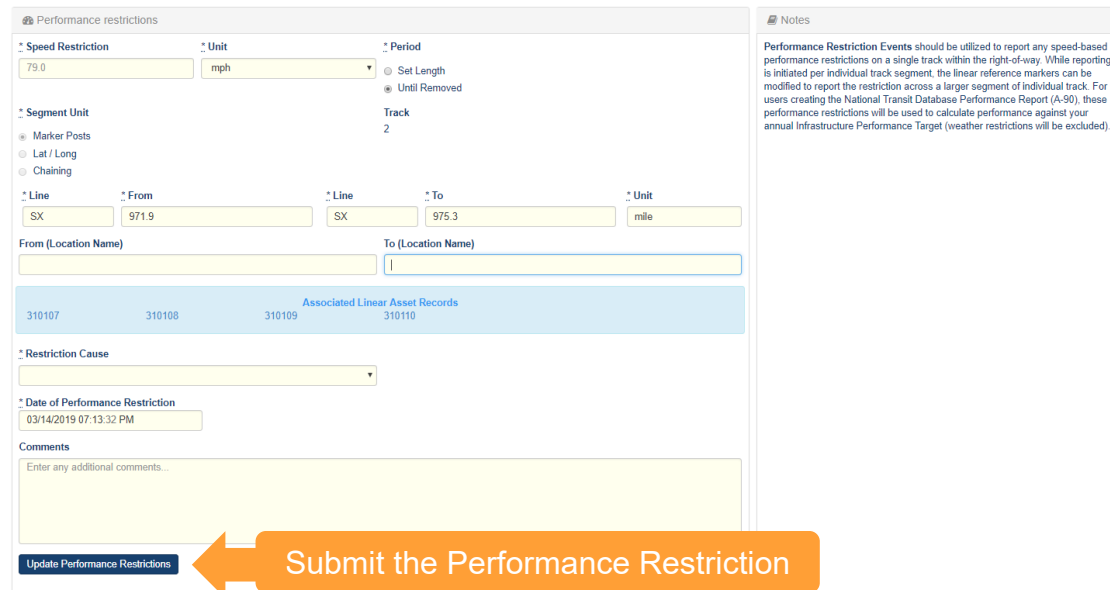
Figure 61 Lifecycle Action Menu



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 62 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 63 Maintenance Dropdown

The screenshot shows the TransAM Asset Manager (Staging) interface. A navigation bar at the top includes icons for Home, a vehicle, a chart, a dollar sign, a wrench, a bar chart, and a globe. Below the navigation bar, a 'Maintenance Dropdown' menu is open, with an orange arrow pointing to the 'Performance Restrictions' option. The main content area is divided into three sections: 'Asset Summary', 'Capital Projects', and 'Audit Summary'. The 'Asset Summary' table lists various categories and their associated costs. The 'Capital Projects' table shows two projects for the SFRTA agency. The 'Audit Summary' section indicates that no active audits were 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 64 Performance Restriction Management

The screenshot displays the 'Performance Restrictions' management interface. At the top, there are filters for 'Active Restrictions', 'Status' (set to 'Active'), 'Active Start', and 'Active End'. Below the filters is a table with the following columns: 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, and Comments. The table contains seven rows of data, each with a 'Closeout' button in the final column. The first row shows a restriction for SFRTA with a 'Rail Defect' cause. The second row shows a restriction for SFRTA with a 'Maintenance' cause. The third row shows a restriction for SFRTA with a 'Rail Defect' cause. The fourth row shows a restriction for SFRTA with a 'Rail Defect' cause. The fifth row shows a restriction for SFRTA with a 'Rail Defect' cause. The sixth row shows a restriction for SFRTA with a 'Rail Defect' cause. The seventh row shows a restriction for SFRTA with a 'Rail Defect' cause. At the bottom left, it says '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 65 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 66 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 67 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 an arrow points to the 'Asset Replacement/Rehabilitation Policy' option. 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 and an 'Audit' button.

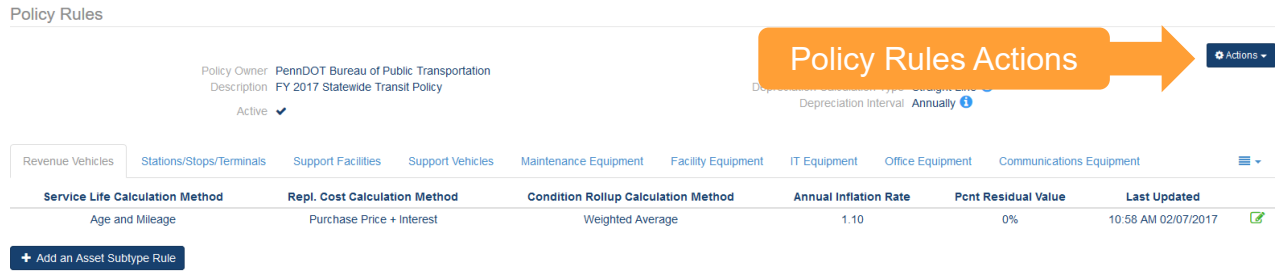
Use the organization filter dropdown to choose the correct organization. You will then need to select the policy year that you wish to work with. Pressing the Filter Button will display the policy rules for the organization and policy year that you have chosen.

Figure 68 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 section is titled 'Asset Replacement/Rehabilitation Policy'. Below the title, there is a 'Filters' section with two dropdown menus: 'BPT-PennDOT Bureau of Public Transportation' and 'FY 2017 Statewide Transit Policy (Current)'. Two orange callout boxes with arrows point to these dropdowns, labeled 'Organization Filter' and 'Policy Year'. Below the filters, there is a 'Policy Rules' section with a table of policy rules. The table has 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 lists various asset types such as 'Support Facilities', 'Support Vehicles', 'Maintenance Equipment', 'Facility Equipment', 'IT Equipment', 'Office Equipment', 'Communications Equipment', 'Signals/Signs', and 'Rail Cars'. An 'Actions' button is located at the top right of the table.

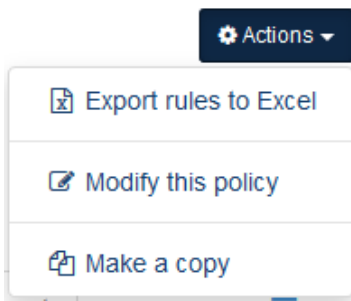
Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

Figure 69 Policy Rules



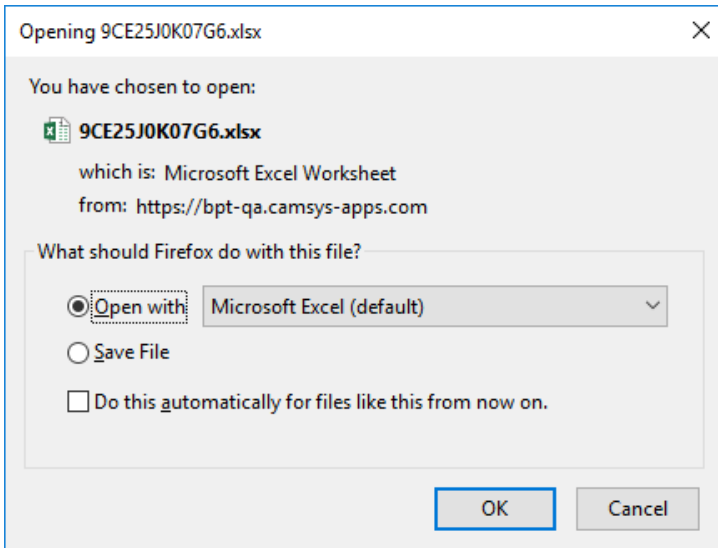
The Actions button will display a list of options as shown.

Figure 70 Policy Rules Actions Dropdown



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

Figure 71 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 72 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 73 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 74 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 75 Additional Assets Dropdown Icon



The Asset Type Rules are listed below the Asset Types.

Figure 76 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 77 Edit Icon



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

Figure 78 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

Save Cancel

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

Figure 79 Asset Type and Asset Subtype rules

Asset Subtype Rules

Service Life Calculation Method		Repl. Cost Calculation Method		Condition Rollup Calculation Method		Annual Inflation Rate	Pcnt Residual	Last Updated			
Age and Mileage		Purchase Price + Interest		Weighted Average		1.10	0%	10:41 AM 09/10/2016			
Asset Subtype	Fuel Type	ESL (Mo)	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	✓

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

Figure 80 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

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!

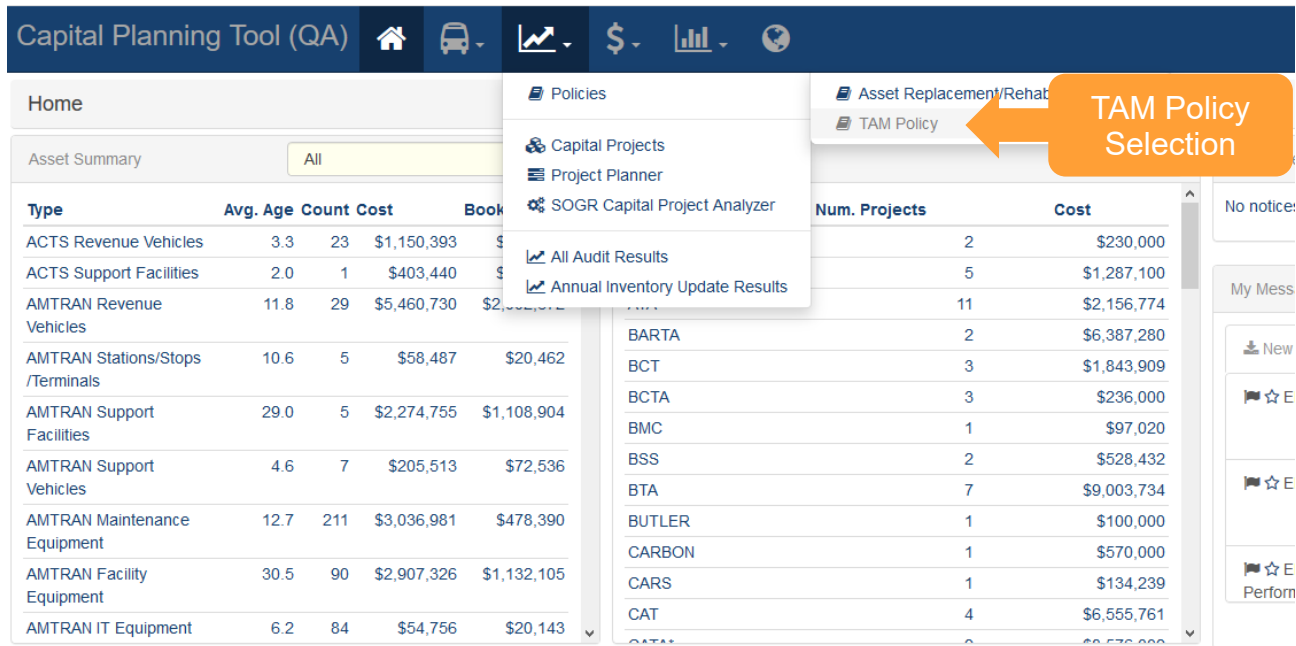
Figure 81 Remove Asset Subtype Rule



6.2 TAM Policy

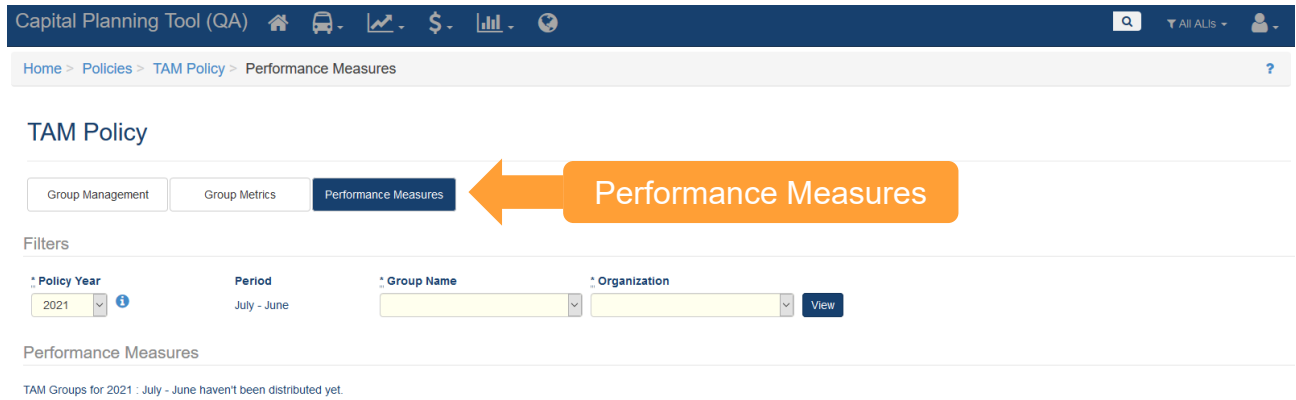
TAM Policies are used to set Useful Life Benchmark (ULB), Transit Economic Requirements Model (TERM), and Performance Measure Percent targets for asset categories on an annual basis. The TAM Policy will be used to conduct performance calculations for the NTD A-90 report. Ideally, TAM Policies should 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 82 TAM Policy Dropdown Menu Selection



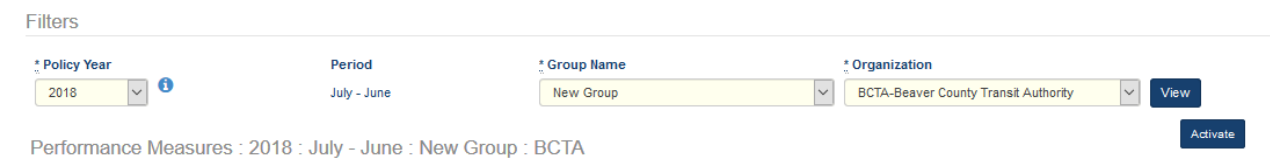
The first step in the creation of a TAM Policy, is to Add a New Policy Year, followed by creating groups. These initial steps can only be completed on the Group Management tab, which is only accessible by users with the TAM Group Manager or Admin permission.

Figure 83 TAM Policy Performance Measures



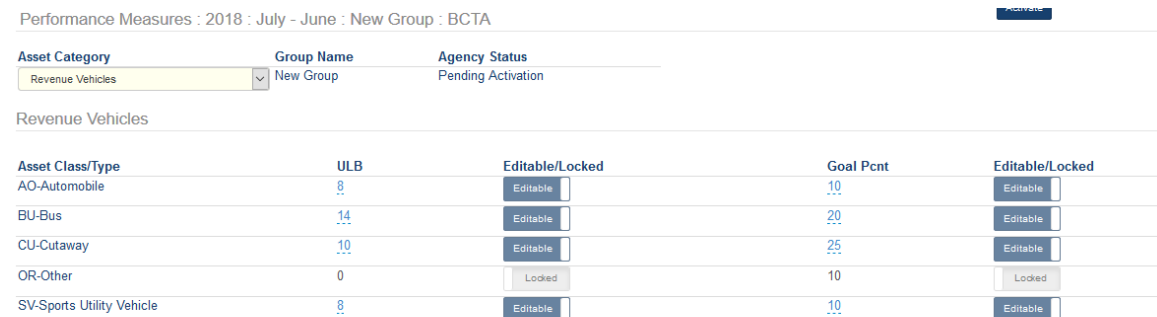
To view an organizations Performance Measures, select the correct Policy Year, Group Name, and Organization and click the “View” button.

Figure 84 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 85 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 86 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 | **Activate**

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

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

Activate Button

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 87 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	\$266,308,134	\$169,519,292	\$406,353,547	\$100,491,802

+ New Capital Project														
Agency	FY	Project	Scope	Emgcy	SOGR	Shadow	Multi Year	Type	Title	Cost	State	Federal	Local	Total
ACTS	FY 18-19	ACTS 18-19 #3990	111		✓			R	Bus: Revenue Rolling Stock: Purchase - Replacement project	\$204,000	\$0	\$0	\$0	\$0
					✓			E	Mobile Vehicle Lifts	\$26,000	\$0	\$0	\$0	\$0
					✓			R	Bus: Support Facilities and Equipment: Acquisition project	\$139,500	\$146	\$0	\$4,647	\$4,793
					✓			R	Bus: Station Stops/Terminals: Acquisition project	\$23,500	\$0	\$0	\$784	\$784
AMTRAN	FY 18-19	AMTRAN 18-19 #5680	111					I	VOH of Hybrid Electric Gilligs	\$975,000	\$0	\$0	\$32,497	\$32,497
AMTRAN	FY 18-19	AMTRAN 18-19 #5681	114					I	Admin Building Security Upgrades	\$25,000	\$0	\$20,000	\$167	\$20,167
AMTRAN	FY 18-19	AMTRAN 18-19 #5907	111					R	test	\$124,100	\$0	\$0	\$0	\$0

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

Figure 88 New Capital Project

New Capital Project

* Organization

* Title 64 characters remaining

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

* Fiscal Year * Scope

* Project Type 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 89 Capital Project Details

Capital Planning Tool (QA)

Home > Capital Projects > AMTRAN 18-19 #6087

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

test Actions

Description Activity Line Items 0 Supporting Documents 0 Comments 0

Project Number AMTRAN 18-19 #6087
 Fiscal Year FY 18-19
 Scope 125
 Total Cost \$0

Edit Capital Project Details

Project Description

Project Justification

Capital Project Additional Details

Type Replac
 SOGR No
 Shadow No
 Multi year No
 Emergency No

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 90 Add an ALI

Capital Planning Tool (QA) Home > Capital Projects > AMTRAN 18-19 #6126

Capital Project AMTRAN 18-19 #6126 was successfully created.

Manual Capital Project Actions

Project Number AMTRAN 18-19 #6126
Fiscal Year FY 18-19
Scope 111
Total Cost \$0

Description Activity Line Items 0 Supporting Documents 0 Comments 0

There are no activity line items for this project.

+ Add Line Item Add an ALI

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

Figure 91 Add an ALI Details

Capital Planning Tool (QA) Home > Capital Projects > AMTRAN 18-19 #6126

Capital Project AMTRAN 18-19 #6126 was successfully created.

Manual Capital Project Actions

Project Number AMTRAN 18-19 #6126
Fiscal Year FY 18-19
Scope 111
Total Cost \$0

Type Replacement
SOGR No
Shadow No
Multi year No
Emergency No

Description Activity Line Items

There are no activity line items for this project.

+ Add Line Item

AMTRAN 18-19 #6126: New Activity Line Item

* Category Select... * TEAM ALI Code Select...

* Cost Estimate \$ Fiscal Year FY 18-19

* Replace with New * Count
 Yes
 No

* Fuel Type Select... * Length

* Name

Create Activity Line Item Cancel

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 92 Project Planner Interface

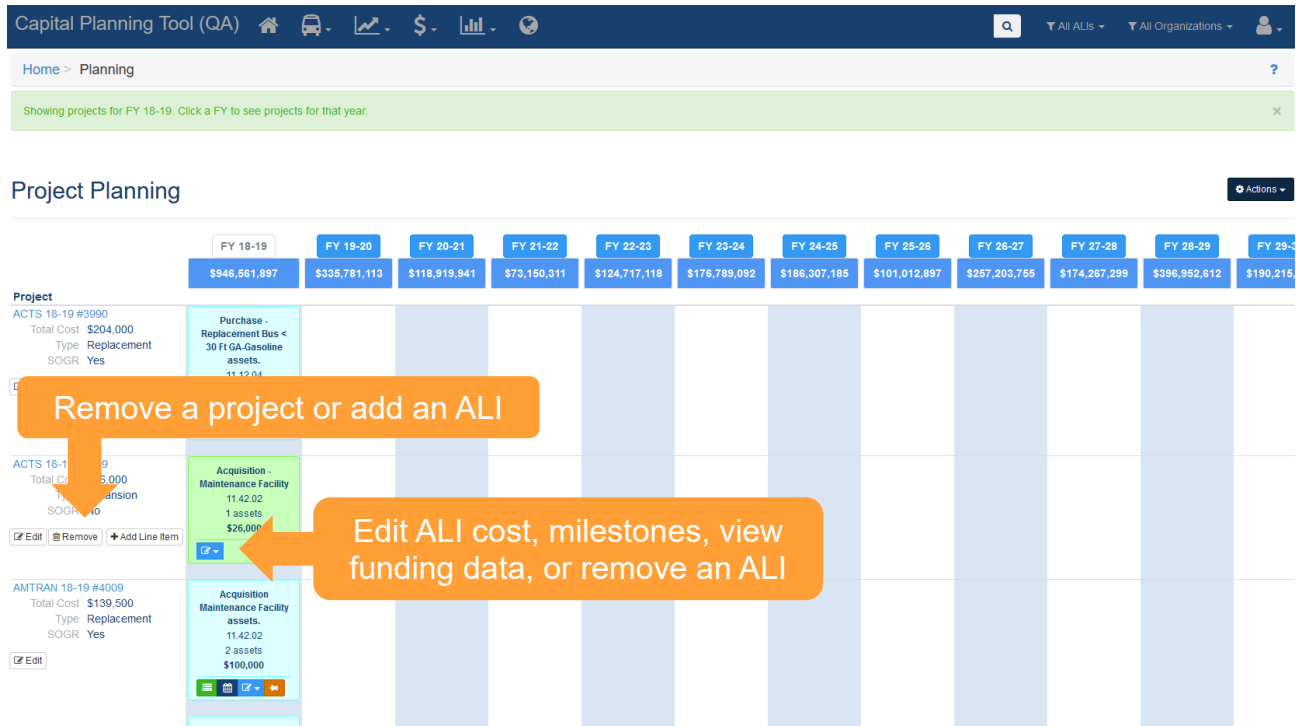
The screenshot displays the Project Planning interface with the following data:

Project/ALI	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
8-19 #3990 (Purchase - Replacement Bus)	\$118,919,941	\$73,150,311	\$124,717,118	\$176,789,092	\$186,307,185	\$101,012,897	\$257,000,000		
ACTS 18-19 #5639 (Acquisition - Maintenance Facility)									
AMTRAN 18-19 #4009 (Acquisition Maintenance Facility)									

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 93 Edit Manually Created Capital Projects



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 94 Edit SOGR Capital Projects

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

Purchase - Replacement Bus < 30 Ft GA-Gasoline assets.
 11.12.04
 2 assets
 \$204,000

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

Acquisition Maintenance Facility assets.
 11.42.02
 2 assets
 \$100,000

Maintenance Facility
 11.42.02
 1 assets
 \$26,000

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.

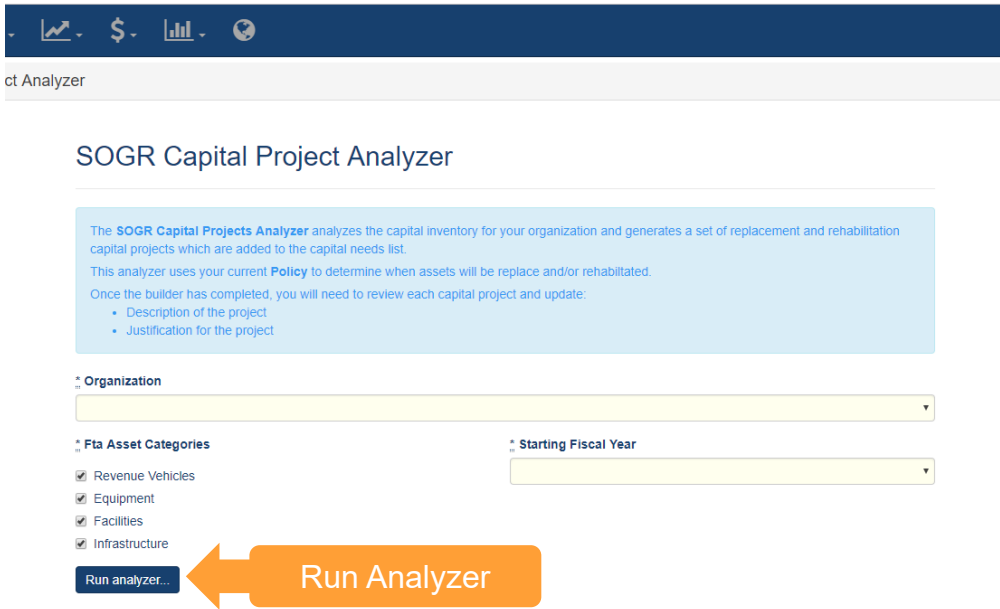
Figure 95 Prioritize Projects
Move ALIs to Different Years

Project	FY 16-19	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
	\$933,519,020	\$308,302,316	\$116,603,350	\$78,344,943	\$126,448,962	\$179,162,039	\$181,436,144	\$100,488,208	\$267,268,514	\$176,681,481	\$394,858,634	\$197,506,888
ACTS 22-23 #6022 Total Cost \$660,407 Type Replacement SOGR Yes [Edit]					Purchase - Replacement Bus < 30 Ft GA-Gasoline assets. 11.12.04 9 assets \$660,407 (e) [Edit]							
AMTRAN 22-23 #4019 Total Cost \$41,056 Type Replacement SOGR Yes [Edit]					Acquisition Shop Equipment assets. 11.42.06 3 assets \$7,387 (e) [Edit]				Acquisition Shop Equipment assets. 11.42.06 3 assets \$7,387 (e) Move to FY 26-27 [Edit]			
					Acquisition ADP Software assets. 11.42.08 2 assets \$1,074 (e) [Edit]							
					Acquisition Miscellaneous Equipment assets. 11.42.20 5 assets \$31,695 (e) [Edit]							
AMTRAN 22-23 #4026 Total Cost \$796 Type Replacement SOGR Yes [Edit]					Acquisition Surveillance Security Systems assets. 11.32.07 1 assets \$100 (e) [Edit]							

8.2 State of Good Repair (SOGR) Capital Project Analyzer

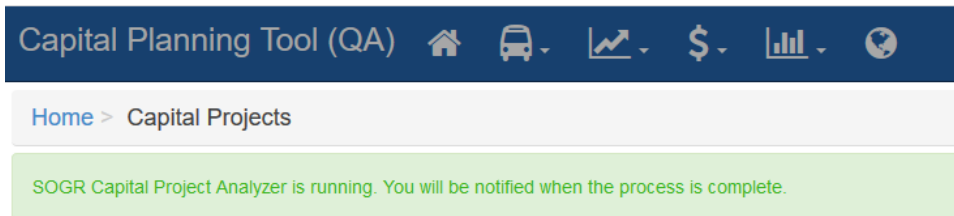
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates 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 96 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 97 SOGR Capital Project Analyzer Processing

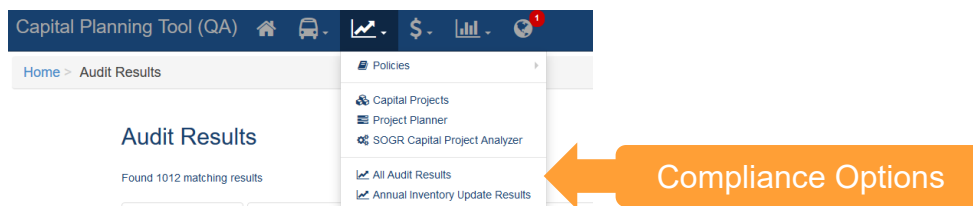


9.0 Compliance

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 98 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 99 Audit Results

Audit Results
Found 1012 matching results

Revenue Vehicles | failed | Annual Inventory Update

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

Export Results

Filter Results

Remember to check the appropriate boxes to export the rows you desire

10.0 Funding

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

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

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

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

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 100 Available Funding Programs

The screenshot shows the Capital Planning Tool (QA) interface. On the left, there is a table titled 'Asset Summary' with columns for Type, Avg. Age, Count, and Cost. Below this table is a 'My Tasks' section. In the center, there is a 'Fund Projects' dropdown menu with a list of programs. On the right, there is a 'My Notices' section. An orange arrow points from the 'Add Funding Programs' button at the bottom to the 'Fund Projects' dropdown menu. Another orange arrow points from the 'Available Funding Programs' text to the dropdown menu.

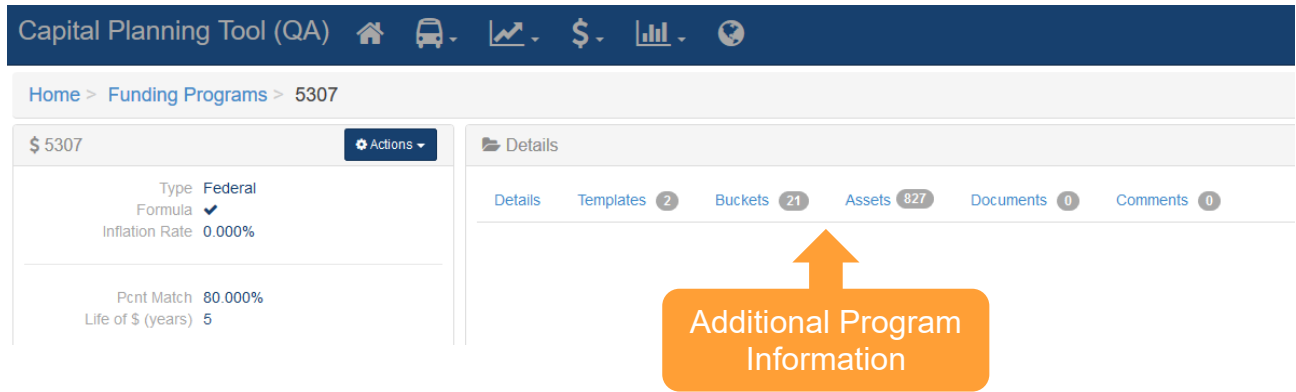
Type	Avg. Age	Count	Cost
Revenue Vehicles	12.0	30	\$5.4
Stations/Stops/Terminals	10.8	5	\$
Support Facilities	29.4	5	\$2.3
Support Vehicles	4.9	7	\$2
Maintenance Equipment	12.8	215	\$3.0
Facility Equipment	30.1	92	\$2,934,797
IT Equipment	6.6	85	\$54,896
Office Equipment	14.1	296	\$112,996
Communications Equipment	7.1	61	\$1,790,766
Signals/Signs	6.7	13	\$82,916

The 'Fund Projects' dropdown menu lists the following programs:

- AMTRAN 18-19 #4
- AMTRAN 18-19 #4
- AMTRAN 18-19 #5
- AMTRAN 18-19 #5
- Flex Funds
- CMAQ
- 5308
- 5309
- 5316
- 5317
- STP

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.

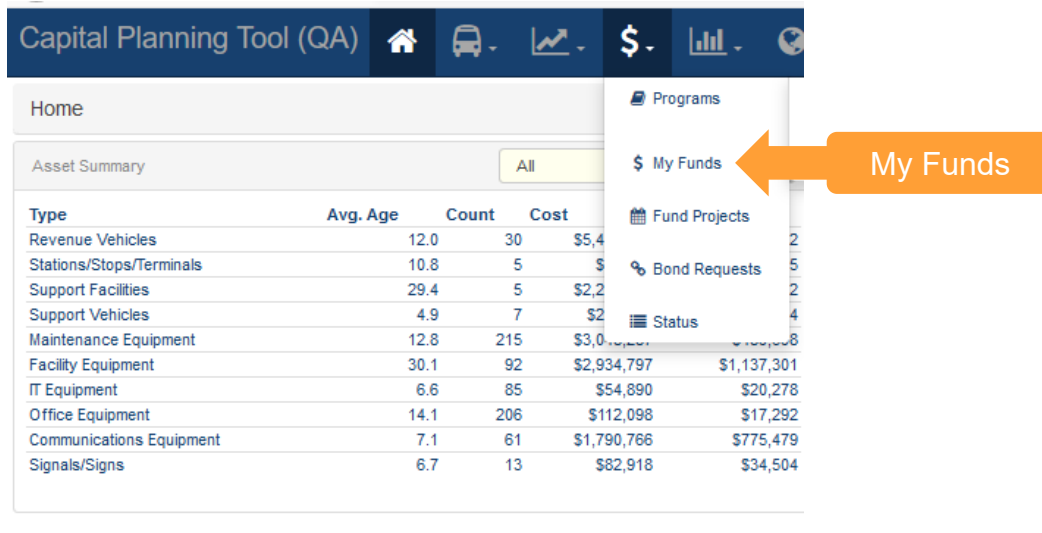
Figure 101 Funding Program Details



10.2 My Funds

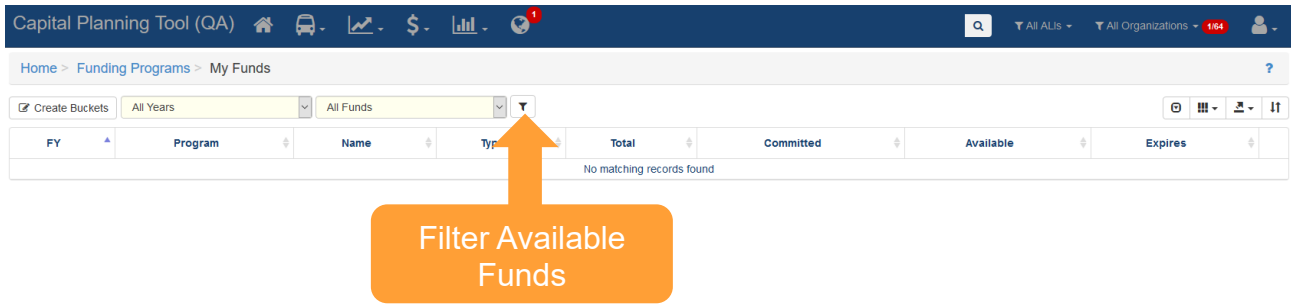
The My Funds section is a section for organization users to view all Buckets available to their organization(s). Buckets should be thought of as program-based annual budgets, which have funds available across one or multiple years, and that can be allocated to ALIs by organization users.

Figure 102 My Funds



Each row in the table represents a unique fund, while each column represents a different fund attribute. Attributes include Fiscal Year, Program, Name, Type, Owner, Total funds available, Committed (allocated value), Available (unallocated) balance, and Expires (year in which the funds expire).

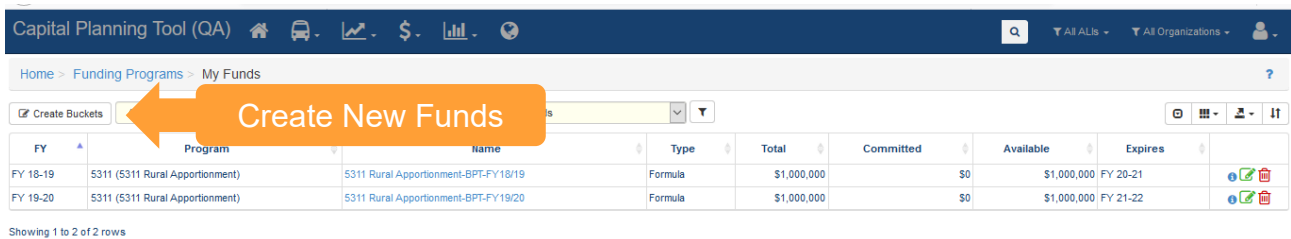
Figure 103 My Funds Table



10.3 Create New Funds

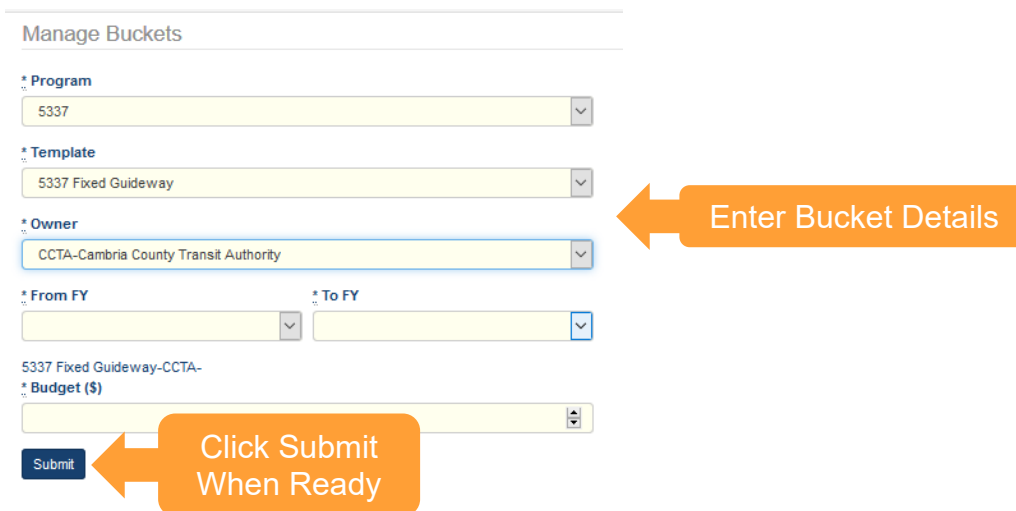
Users also can create new Buckets for use by their organization, for any funding sources that may have not been created by a parent organization.

Figure 104 Create New Funds



Clicking “Create Buckets” will allow you to add new funds based on existing programs and templates. Creating new Buckets is useful if you need to create a budget for any directly generated revenue or other revenue sources not created by a parent organization. Specify the details of the Bucket, click “Submit” and the bucket will be available for use.

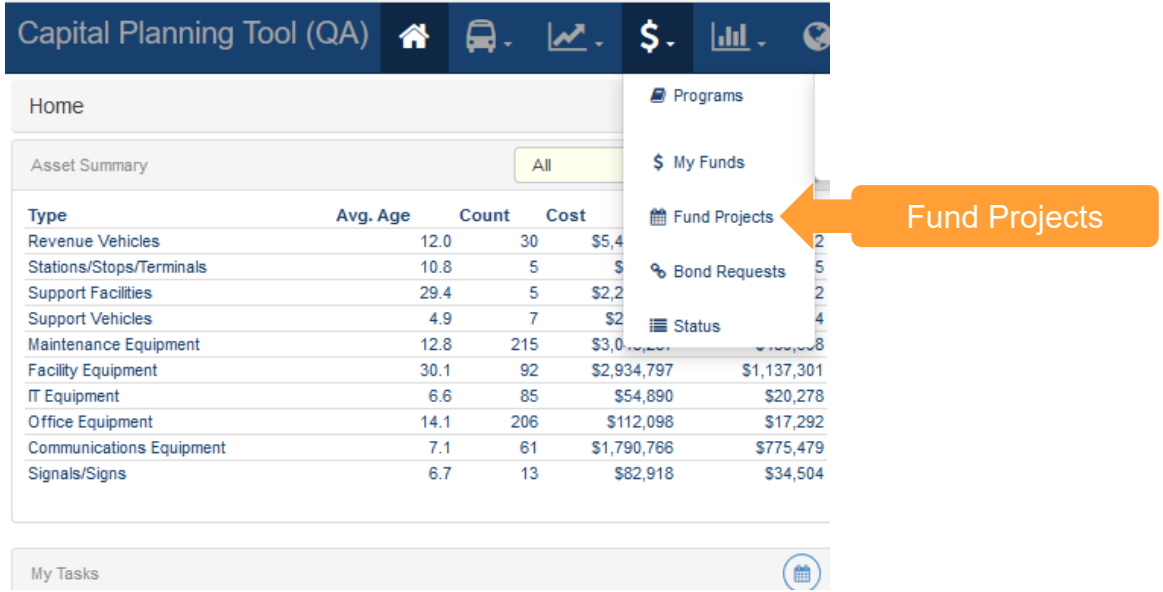
Figure 105 Managing Buckets



10.4 Fund Projects

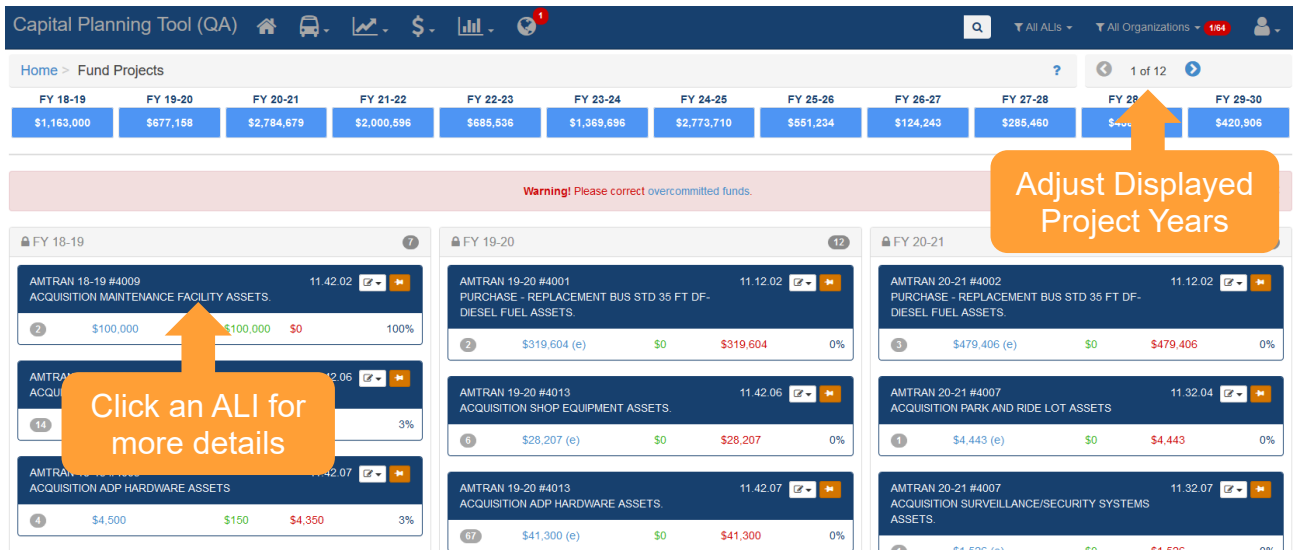
Organization users can allocate available Buckets to projects by ALI from the Fund Projects screen.

Figure 106 Fund Projects



The Fund Projects interface has many elements. The headers show committed (allocated) funds for each fiscal year. Users can scroll through the fiscal years displayed in the larger columns by clicking the arrows at the top right of the screen. Three years-worth of projects are displayed at a time, with all the ALIs for the corresponding fiscal year displayed in each column.

Figure 107 Fund Projects Interface



Clicking on an individual ALI will bring you to the detailed Fund Project screen for that ALI. On the details page is where users can allocate funding from available Buckets to the ALI, remove or move assets tied to the ALI, add comments, or create tasks.

Figure 108 Allocate Funding to ALIs

The screenshot shows the 'Funding' tab for an ALI. On the left, there is a list of ALIs with columns for ID, Name, Date, and Budget. The main area shows the 'Funding Request' form with a 'Line Amount' of \$319,604 and a 'Total Funded' of \$0.000. An orange arrow points to the 'Funding' tab with the text 'Allocate Funding to the ALI'. A light blue callout box contains the text 'You can over-allocate funds, but you will be prompted with a warning'.

Figure 109 Adjust Assets Included in ALI

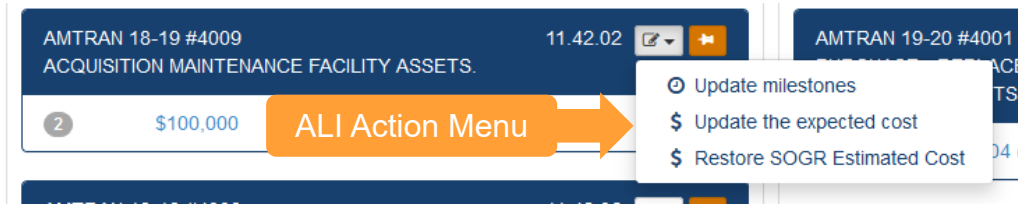
The screenshot shows the 'Assets' tab for an ALI. On the left, there is a list of ALIs. The main area shows an 'Assets' table with columns for Tag, Subtype, Fuel, Descrip., Age, Bcklg, Mileage, Cond., Policy FY, and Sch. Cost. An orange arrow points to the 'Assets' tab with the text 'Modify Included Assets'.

Tag	Subtype	Fuel	Descrip.	Age	Bcklg	Mileage	Cond.	Policy FY	Sch. Cost
Totals for 2 assets									
086560	2	DF	GIL 35-foot low-floor (used and rehabbed)	3		345,025	-	FY 19-20	\$159,802
086561	2	DF	GIL 35-foot low-floor (used and rehabbed)	3		35,386	-	FY 19-20	\$159,802

Clicking on the actions menu in the main Fund Projects interface on an ALI will allow you to update characteristics of the ALI such as milestones, estimated ALI cost, or revert to the original SOGR estimate if the ALI estimate was modified at any point.

A horizontal pin icon marks ALIs as "preapproved" to ensure these projects are programmed in an organization's capital plan. The functionality involves the parent organization "pinning" an ALI to an organization's capital plan, which prevents that ALI from being further altered in any way. Child organizations are unable to pin their own ALIs.

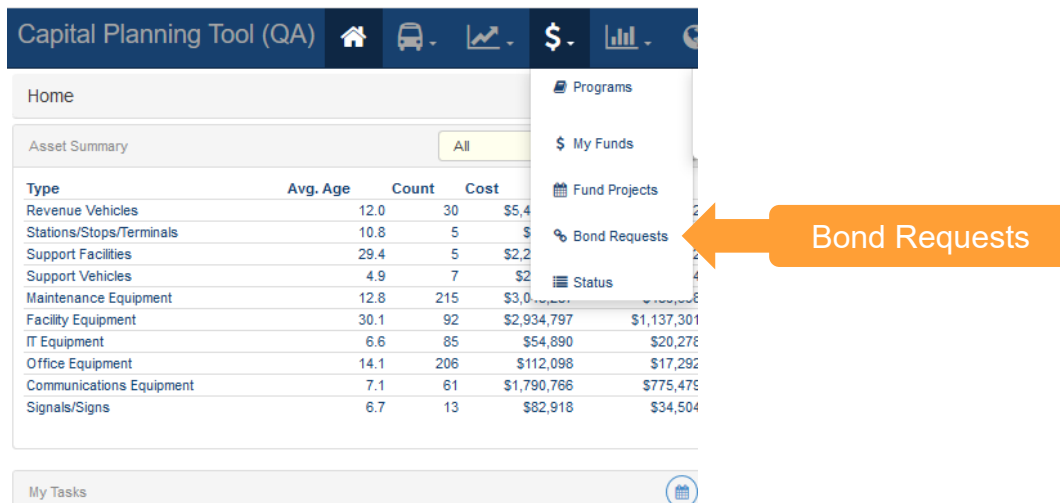
Figure 110 Fund Projects ALI Actions and Pinning Projects



10.5 Bond Requests

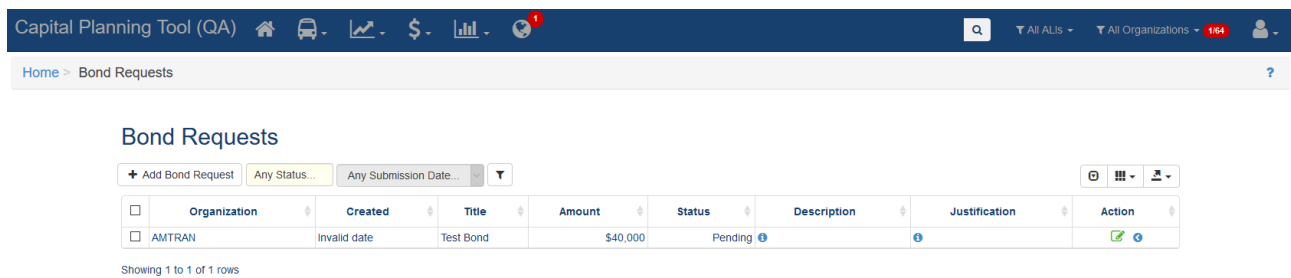
A Bond Request is a request by an organization (transit agency or parent agency) for a bond authorization in a future piece of legislation. To begin using bond requests, navigate to the Bond Request interface.

Figure 111 Bond Requests



The bond request screen shows details about a bond request.

Figure 112 Bond Request Interface



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

Figure 113 New Bond Request

New Bond Request

*** Organization**

*** Title**

*** Description**

*** Justification**

* Amount	* Federal Pcnt	Federal Amount
<input type="text" value="\$ 0"/>	<input type="text" value="0 %"/>	<input type="text" value="\$ 0"/>
Federal Funds	* State Pcnt	State Amount
<input type="text" value="None"/>	<input type="text" value="96.775 %"/>	<input type="text" value="\$ 0"/>
	Local Pcnt	Local Amount
	<input type="text" value="3.225 %"/>	<input type="text" value="\$ 0"/>

[Create Bond request](#)

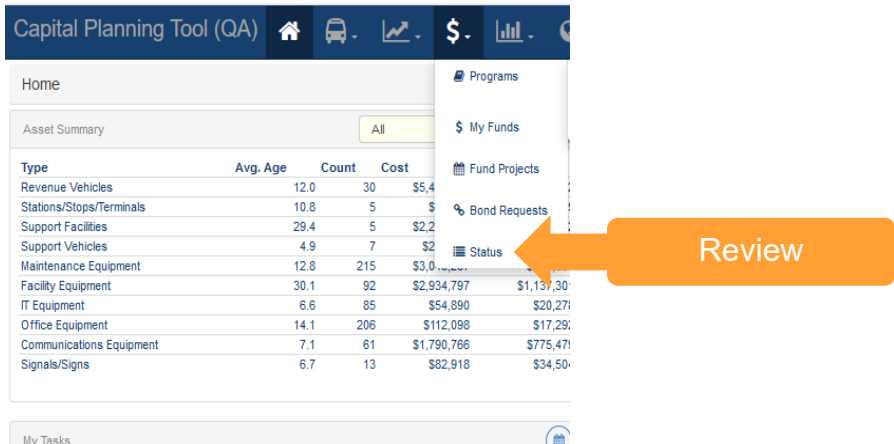
Once a bond request is submitted, it has four status updates. Pending (sent to DOT for review), rejected (DOT has reviewed and rejected), submitted (submitted to the program office for legislator review), then authorized or not authorized (by legislative review).

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

10.6 Review

The Status interface serves as a project review module and tracks the entire work flow for the annual capital project planning process. As the fiscal year progresses, users will mark work complete in the Status page and advance through the work flow. When the year's work has been completed, the data is archived and upon completion of all organization project funding the application will be rolled over into the next planning year.

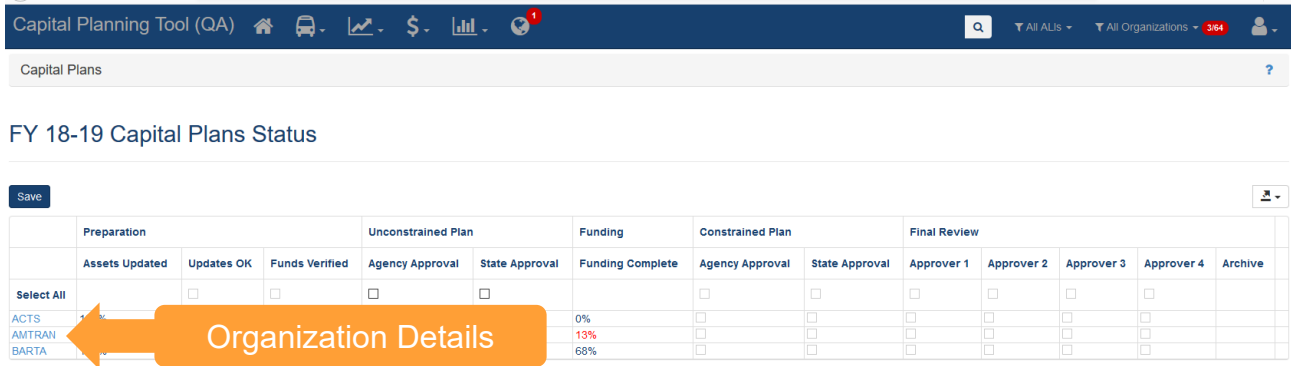
Figure 114 Review



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

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

Figure 115 Review and Status



Clicking on an individual organization will give details about the status of the organization’s review.

Figure 116 Review and Status Organization Detail

Capital Planning Tool (QA) All ALIs All Organizations 364

Capital Plans > ACTS FY 18-19 Capital Plan 1 of 3

ACTS FY 18-19

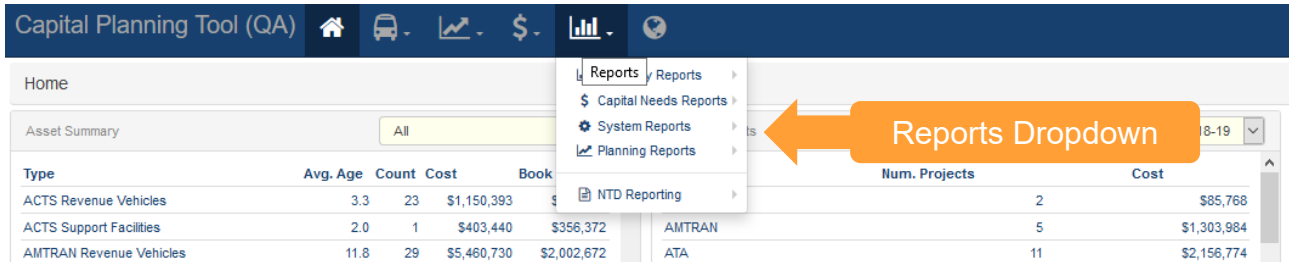
Save

Preparation	Assets Updated	100%
	Updates OK	<input checked="" type="checkbox"/>
	Funds Verified	<input checked="" type="checkbox"/>
Unconstrained Plan	Agency Approval	<input checked="" type="checkbox"/>
	State Approval	<input type="checkbox"/>
Funding	Funding Complete	0%
Constrained Plan	Agency Approval	<input type="checkbox"/>
	State Approval	<input type="checkbox"/>
Final Review	Approver 1	<input type="checkbox"/>
	Approver 2	<input type="checkbox"/>
	Approver 3	<input type="checkbox"/>
	Approver 4	<input type="checkbox"/>

11.0 Reports

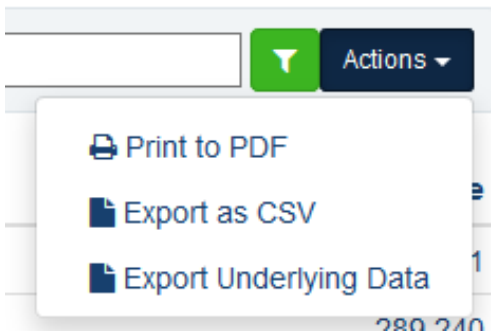
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

Figure 117 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 118 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 119 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 120 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 121 Asset Funding Source Report

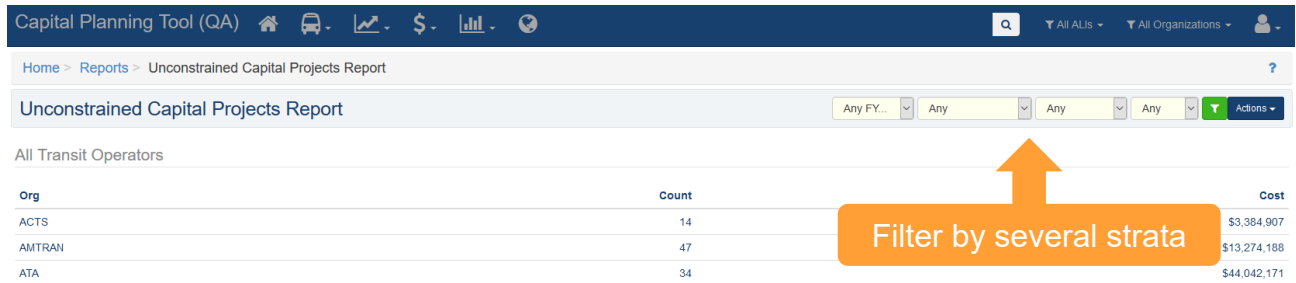


11.2 Capital Needs Reports

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

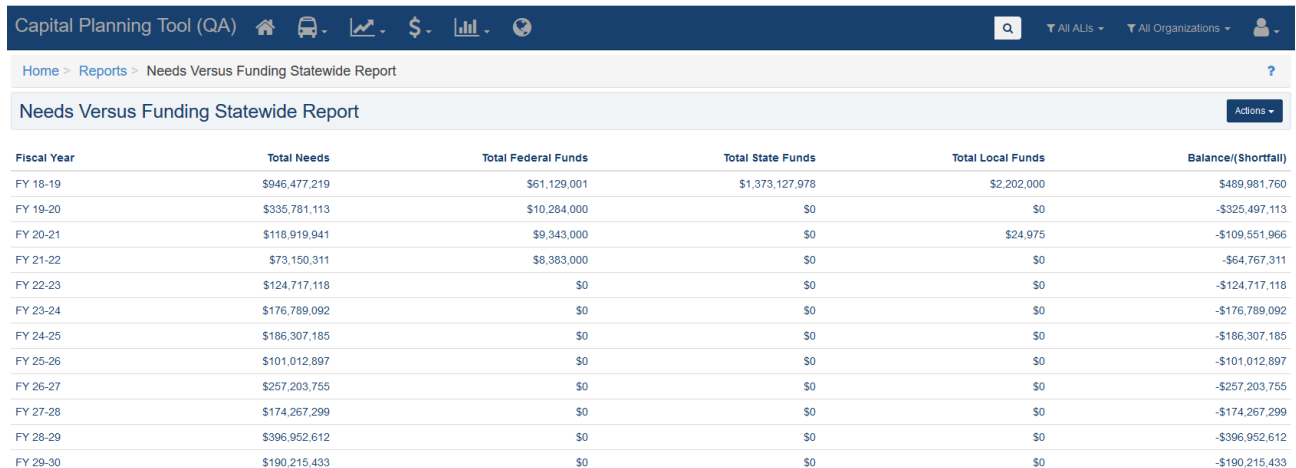
The Unconstrained Capital Projects Report is a collection of unconstrained capital projects associated with individual organizations. This report can be filtered by fiscal year, emergency versus nonemergency, multi or single-year, and method of creation.

Figure 122 Unconstrained Capital Projects Report



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

Figure 123 Need versus Funding Statewide Report



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

Figure 124 ALI Funding Report

Year	Agency	# ALIs	# Assets	Cost	Funded	Balance
FY 18-19	ACTS	2	2	\$145,536	\$0	\$145,536
FY 18-19	AMTRAN	7	36	\$1		\$1,008,021
FY 18-19	ATA	14	16	\$2		\$2,071,957
FY 18-19	BARTA	5	26	\$6,367,260	\$4,376,127	\$2,008,553
FY 18-19	BCT	7	43	\$1,843,909	\$0	\$1,843,909
FY 18-19	BCTA	4	7	\$236,000	\$0	\$236,000
FY 18-19	BSS	2	6	\$530,578	\$0	\$530,578
FY 18-19	BTA	4	4	\$4,663,357	\$19,800	\$4,643,557

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

Figure 125 Capital Plan Report

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

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

Figure 126 Bond Request Report

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

11.3 Planning Reports

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

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

Figure 127 Revenue Vehicle Replacement Report

Revenue Vehicle Replacement Report						
						Fiscal Year
						FY 19-20
All Transit Operators						
Fiscal Year	Category	Class	Sub Type	Count	Book Value	Replacement Cost
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Sedan/Station Wagon	19	\$220,647	\$1,032,574
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Commuter/Suburban	28	\$10,703,185	\$15,351,540
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 35 FT	156	\$33,434,345	\$64,564,155
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus Std 40 FT	151	\$25,090,859	\$65,899,722
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus < 30 FT	404	\$22,996,202	\$117,170,310
FY 19-20	Revenue Vehicles	Buses (Rubber Tire Vehicles)	Bus 30 FT	59	\$12,698,894	\$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 128 State of Good Repair Report

State of Good Repair Report						
						Fiscal Year
						FY 18-15
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	\$416,151	\$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	\$8,055,473	\$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	\$3,087,370	
Revenue Vehicles	Rail Cars	Commuter Locomotive Diesel	20	\$74,188,285	\$65,980,817	
Equipment	Service Vehicles (Non-Revenue)	Pickup/Utility Truck	75	\$436,717	\$2,616,326	
Equipment	Service Vehicles (Non-Revenue)	Sports Utility Vehicle	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	\$11,975,480	
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.

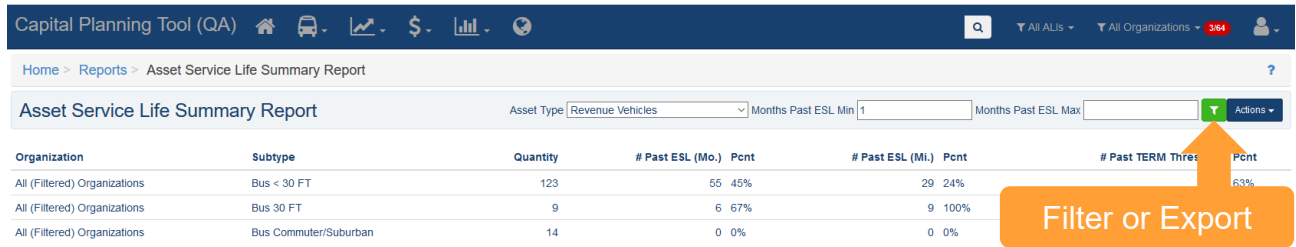
Figure 129 Disposition Report

Disposition Report						
						Fiscal Year
						FY 18-15
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 130 Asset Service Life Summary Report

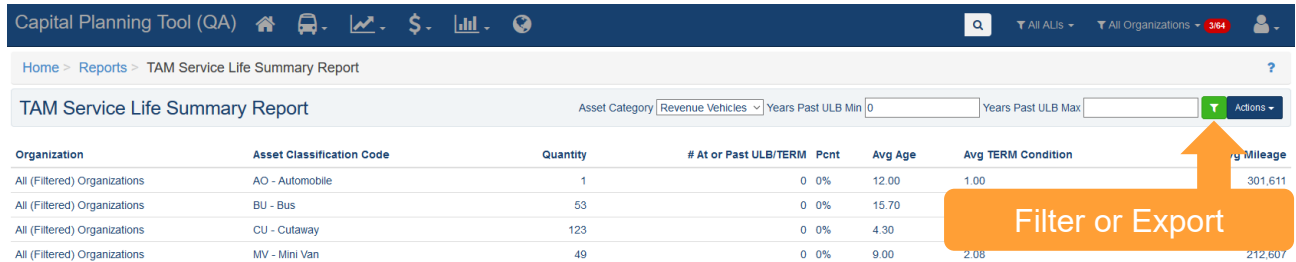


The TAM Service Life Summary Report displays all asset categories, listed by subtype, and calculates the following:

- 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 131 TAM Service Life Summary Report



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 132 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

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... [Filter] [Refresh] [Print]

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.

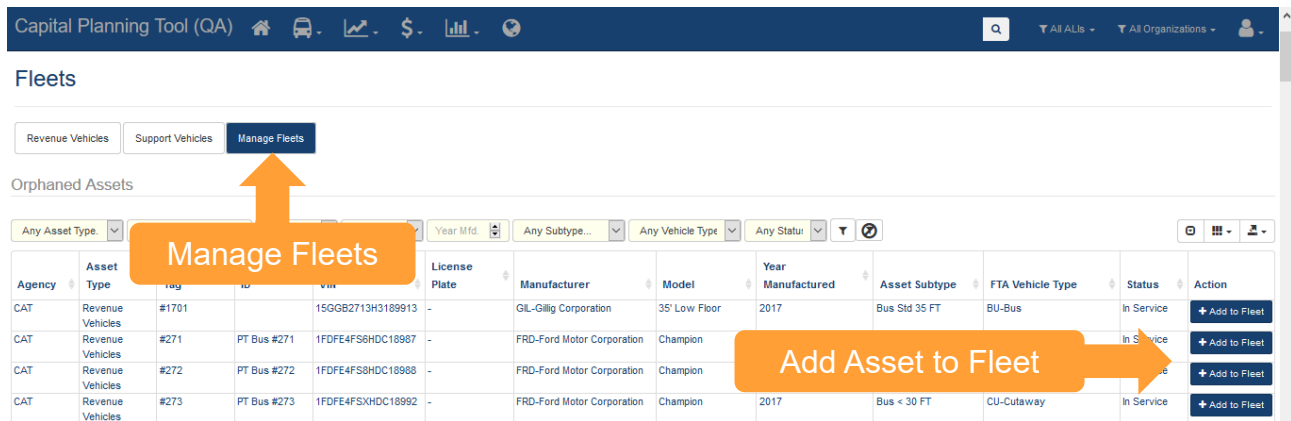
Build Revenue or Support Fleets

Build Revenue Vehicles Fleets

Build Support Vehicles Fleets

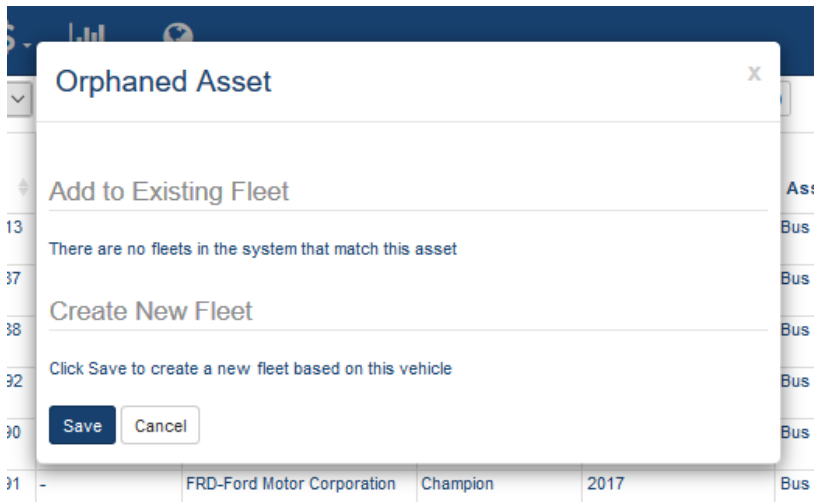
When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

Figure 133 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 134 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 135 Adding a New Fleet

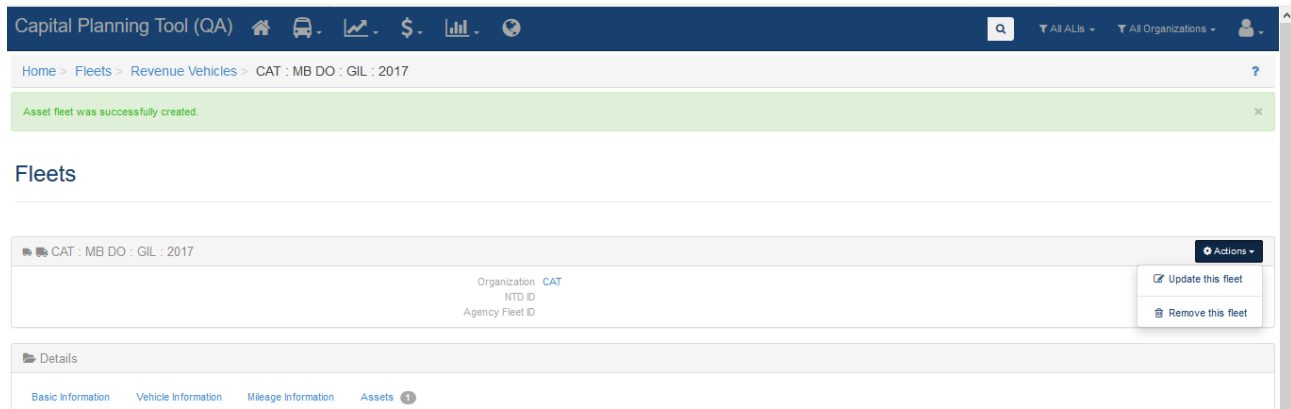


Figure 136 Update Asset Fleet Details

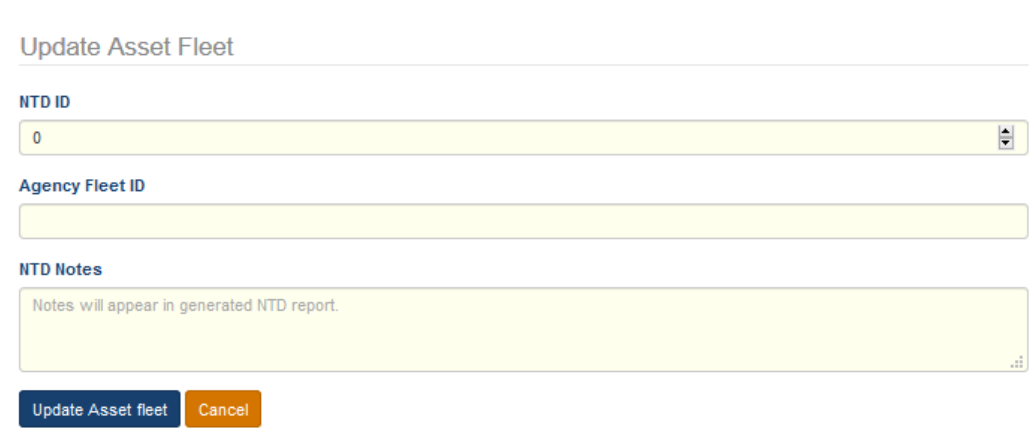


Figure 137 Update Odometer Readings

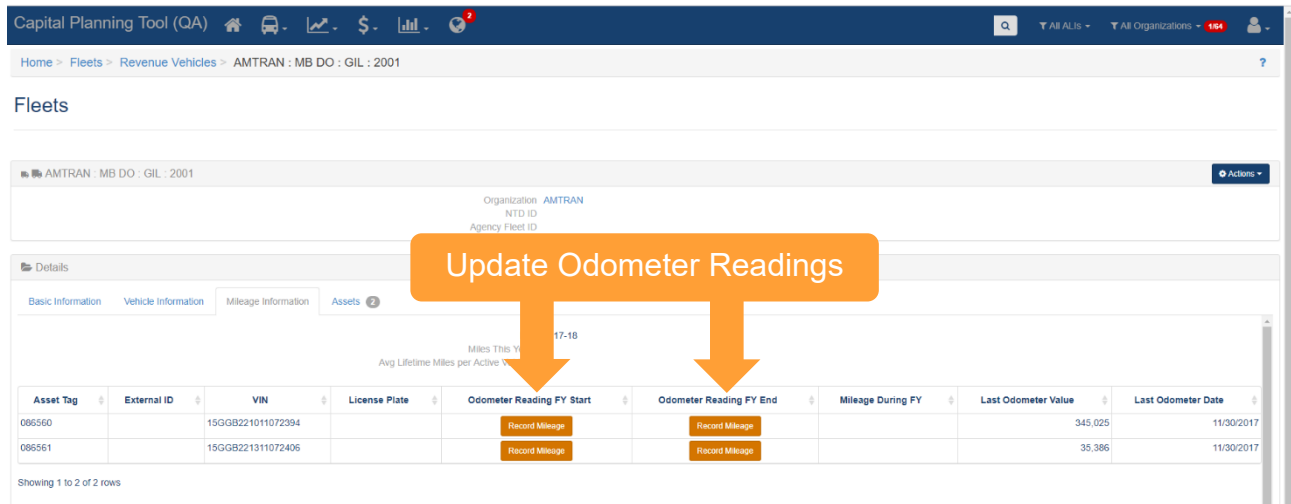


Figure 138 Remove or Add Assets from within a Fleet

The screenshot shows the 'Assets' tab for a fleet. The table below contains the following data:

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	⊕

Showing 1 to 2 of 2 rows

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.

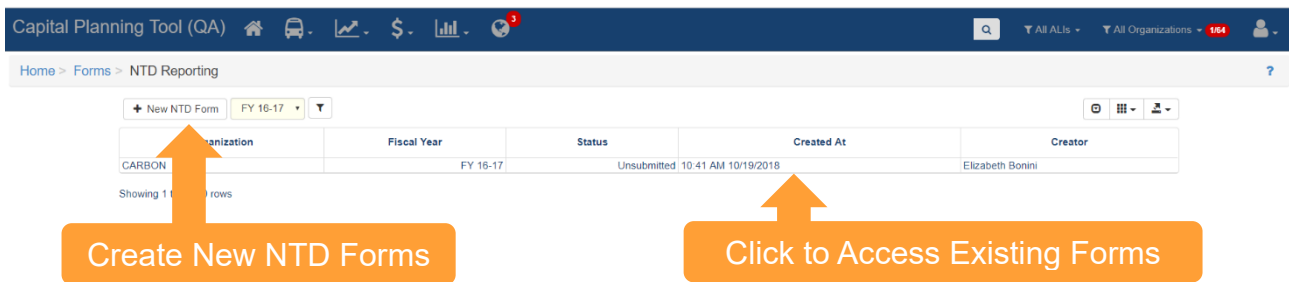
Each report pulls and calculates data according to the reporting year selected, and the activities associated with the system reporting period, i.e., July—June, October—September, or January—December.

Figure 139 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 140 Table of Previously Generated NTD Reports



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

Figure 141 Create New Reporting Year Forms

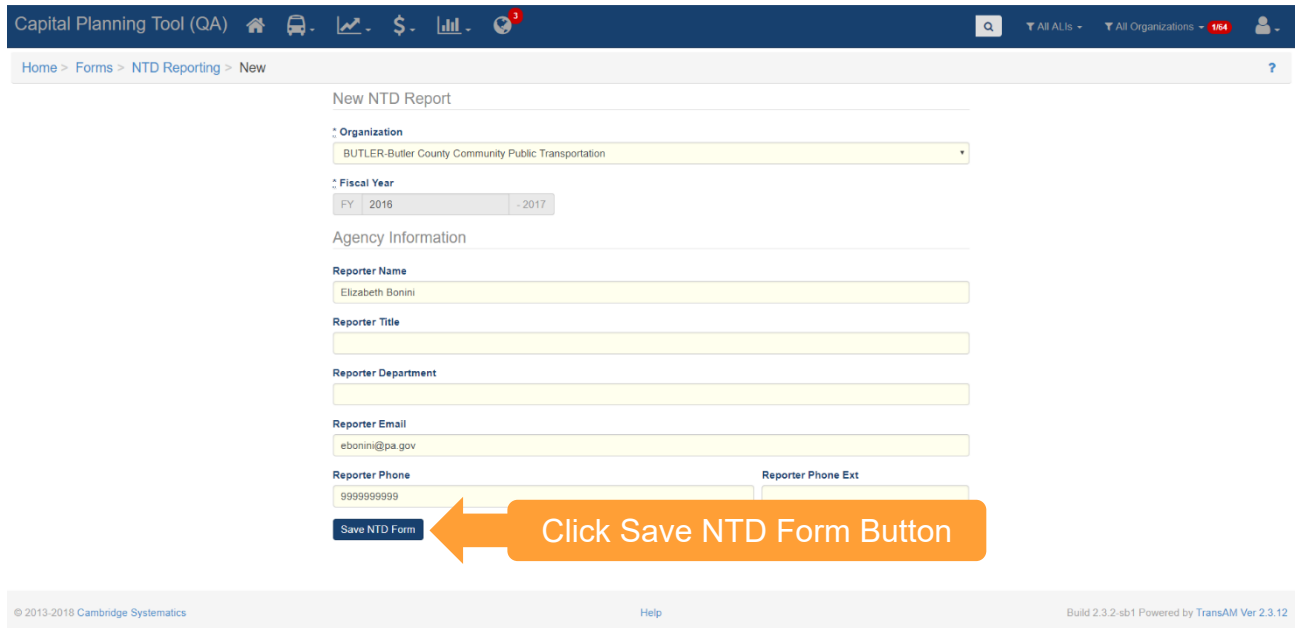
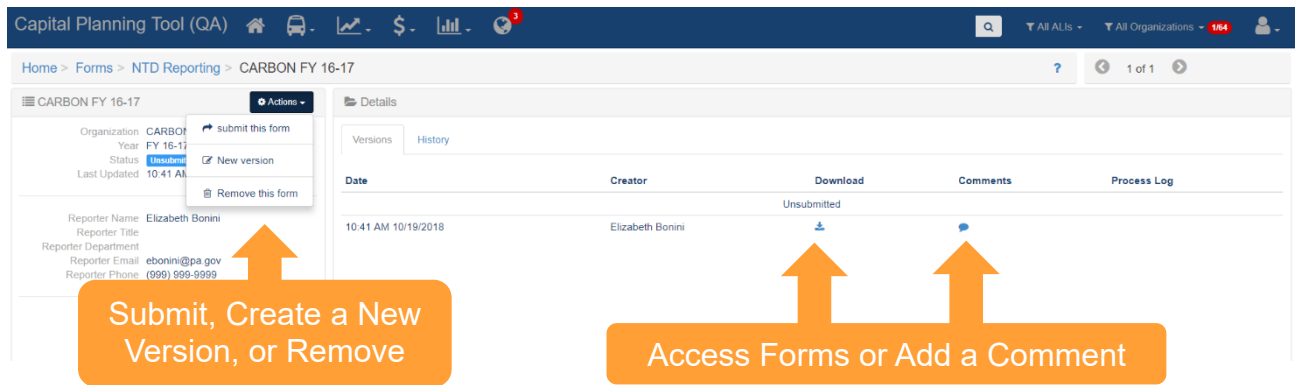


Figure 142 NTD Report Details and Data



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 143 Download each NTD Form

