CAMBRIDGE SYSTEMATICS

# TransAM

*General User*

# User Guide

*prepared for*

**South Florida Regional Transportation Authority (SFRTA)**

*prepared by*

**Cambridge Systematics, Inc.**

Updated as of Release 2.7.0

www.camsys.com

*user guide*

# TransAM

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**South Florida Regional Transportation Authority (SFRTA)**

*prepared by*

**Cambridge Systematics, Inc.**
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*date*

**September 28, 2019**

# Table of Contents

**1.0 Welcome! ..... 1**
1.1 Initial Log In and Password Reset ..... 1
1.2 Ongoing Site Access ..... 2

**2.0 Dashboard ..... 3**
2.1 Dashboard Elements ..... 3
2.2 Header Menu and Controls ..... 3

**3.0 General Features and Tools ..... 5**
3.1 Table Controls ..... 5
3.2 Site Filters ..... 5
3.3 Messages ..... 6
3.4 Activity Line Item (ALI) Filter ..... 7
3.5 Organizations Filter ..... 8
3.6 Search ..... 9
3.7 User and Organization Options ..... 9
3.8 Notifications ..... 11
3.9 Help ..... 12

**4.0 Asset Inventory ..... 13**
4.1 Add an Asset ..... 13
4.2 Accessing Existing Assets ..... 15
4.3 Editing or Updating Existing Asset Profile Data ..... 17
4.4 Updating Existing Asset Lifecycle Data ..... 18
4.5 Action Events (Disposition and Transfer Review) ..... 19
4.6 Adding or Updating Assets by Bulk Update ..... 21
4.7 Query ..... 24
4.8 Map ..... 27
4.9 Groups ..... 29

**5.0 Maintenance ..... 31**
5.1 Performance Restrictions ..... 31

**6.0 Policies ..... 35**
6.1 Asset Replacement/Rehabilitation Policy ..... 35
6.2 TAM Policy ..... 41

**7.0 Projects ..... 45**

**8.0 Project Planning ..... 49**
8.1 Project Planner ..... 49
8.2 State of Good Repair (SOGR) Capital Project Analyzer ..... 52

**9.0 Funding ..... 53**
9.1 Programs ..... 53

**10.0 Reports ..... 55**
10.1 Inventory Reports ..... 55
10.2 Capital Needs Reports ..... 57
10.3 Planning Reports ..... 57

**11.0 Specialized Reports ..... 61**
11.1 Asset Fleet Builder ..... 61
11.2 NTD Asset Reports ..... 64

# List of Figures


Figure 1 Password Reset Request Screen....1
Figure 2 Set/Reset Password Screen....1
Figure 3 Login Screen....2
Figure 4 Dashboard Elements....3
Figure 5 Header Menu....3
Figure 6 Sorting Controls....5
Figure 7 Export Button....5
Figure 8 Table Tools....5
Figure 9 Filter Icon....5
Figure 10 User Profile *Messages*....6
Figure 11 Messages....6
Figure 12 Message Interface....7
Figure 13 ALI Filter....7
Figure 14 ALI Filters....7
Figure 15 New ALI Filter....8
Figure 16 Organization Filter....8
Figure 17 Organization Filter Selections....9
Figure 18 Search Box....9
Figure 19 User Menu....9
Figure 20 User Menu Dropdown....10
Figure 21 Organization Details....10
Figure 22 Profile Details....11
Figure 23 Report an Issue....11
Figure 24 Notification Drawer....12
Figure 25 User Guide....12
Figure 27 Asset Inventory Dropdown....13
Figure 28 Adding an Asset....13
Figure 29 Select the Organization and Asset Class....14
Figure 30 Adding Asset Required Details....14
Figure 31 Add the Asset and Go To The New Record....15
Figure 32 Existing Assets....16
Figure 33 Existing Asset Interface....16
Figure 34 Asset Record: Highlights....17
Figure 35 Asset Record: Profile and Summary....17
Figure 36 Editing the Profile of an Existing Asset....18

Figure 37 Updating the Lifecycle of an Existing Asset ..... 19
Figure 38 Asset Action Events (Disposition and Transfer) ..... 20
Figure 39 Early Disposition Requests ..... 20
Figure 40 Bulk Updates ..... 21
Figure 41 Bulk Update Tools ..... 21
Figure 42 Bulk Update Details ..... 22
Figure 43 Bulk Update Spreadsheet Download ..... 22
Figure 44 Bulk Update Spreadsheet ..... 22
Figure 45 Bulk Update Upload ..... 23
Figure 46 Bulk Upload Processing ..... 23
Figure 47 Bulk Update Edit ..... 24
Figure 48 Asset Query ..... 24
Figure 49 Column Selection ..... 25
Figure 50 Filter Selection ..... 25
Figure 51 Calculate, Export or Save ..... 26
Figure 52 Saved Queries ..... 26
Figure 53 Asset Map ..... 27
Figure 54 Map Customization ..... 27
Figure 55 Map Layers ..... 28
Figure 56 Map Filter ..... 28
Figure 57 Map Asset Details ..... 29
Figure 58 Asset Groups ..... 29
Figure 59 Adding an Asset to a Group ..... 30
Figure 60 Asset Inventory Dropdown : Infrastructure - Track ..... 31
Figure 61 Existing Asset Interface : Infrastructure - Track ..... 31
Figure 62 Lifecycle Action Menu ..... 32
Figure 63 Performance Restriction Lifecycle Event ..... 32
Figure 64 Maintenance Dropdown ..... 33
Figure 65 Performance Restriction Management ..... 33
Figure 66 Policies Dropdown ..... 35
Figure 67 Policy Rule Sets ..... 35
Figure 68 Asset Replacement/Rehabilitation Policy ..... 36
Figure 69 Asset Replacement/Rehabilitation Policy Filters ..... 36
Figure 70 Policy Rules ..... 37
Figure 71 Policy Rules Actions Dropdown ..... 37
Figure 72 Export rules to Excel (Windows dialog box) ..... 37
Figure 73 Modify (Update) Organization Policy Dialog ..... 38

Figure 74 Copy Organization Policy Dialog ..... 38
Figure 75 Asset Types ..... 39
Figure 76 Additional Assets Dropdown Icon ..... 39
Figure 77 Asset Type Rules ..... 39
Figure 78 Edit Icon ..... 39
Figure 79 Modify Asset Policy Rule ..... 40
Figure 80 Asset Type and Asset Subtype rules ..... 40
Figure 81 Modify Asset Subtype Rule ..... 40
Figure 82 Remove Asset Subtype Rule ..... 41
Figure 83 TAM Policy Dropdown Menu Selection ..... 41
Figure 84 TAM Policy Performance Measures ..... 42
Figure 85 Policy Year Filters ..... 42
Figure 86 Asset Type Percentage Settings ..... 42
Figure 87 Activate Perfomance Measures ..... 43
Figure 88 Capital Projects Table ..... 45
Figure 89 New Capital Project ..... 46
Figure 90 Capital Project Details ..... 46
Figure 91 Add an ALI ..... 47
Figure 92 Add an ALI Details ..... 47
Figure 93 Project Planner Interface ..... 49
Figure 94 Edit Manually Created Capital Projects ..... 50
Figure 95 Edit SOGR Capital Projects ..... 51
Figure 96 Prioritize Projects *Move ALIs to Different Years* ..... 51
Figure 97 Running SOGR Capital Project Analyzer ..... 52
Figure 98 SOGR Capital Project Analyzer Processing ..... 52
Figure 99 Available Funding Programs ..... 53
Figure 100 Funding Program Details ..... 53
Figure 101 Reports Dropdown ..... 55
Figure 102 Report Exports ..... 55
Figure 103 Asset Condition Report ..... 55
Figure 104 Asset Age Report ..... 56
Figure 105 Asset Funding Source Report ..... 56
Figure 106 Backlog Report ..... 57
Figure 107 Unconstrained Capital Projects Report ..... 57
Figure 108 Revenue Vehicle Replacement Report ..... 58
Figure 109 State of Good Repair Report ..... 58
Figure 110 Disposition Report ..... 58

Figure 111 Asset Service Life Summary Report....59
Figure 112 TAM Service Life Summary Report....59
Figure 113 Asset Fleet Builder....61
Figure 114 Asset Fleet Builder—Orphaned Assets....62
Figure 115 Adding an Orphaned Asset to a Fleet....62
Figure 116 Adding a New Fleet....63
Figure 117 Update Asset Fleet Details....63
Figure 118 Update Odometer Readings....63
Figure 119 Remove or Add Assets from within a Fleet....64
Figure 120 Access NTD Reports....65
Figure 121 Table of Previously Generated NTD Reports....65
Figure 122 Create New Reporting Year Forms....66
Figure 123 NTD Report Details and Data....66
Figure 124 Download each NTD Form....66

# 1.0 Welcome!

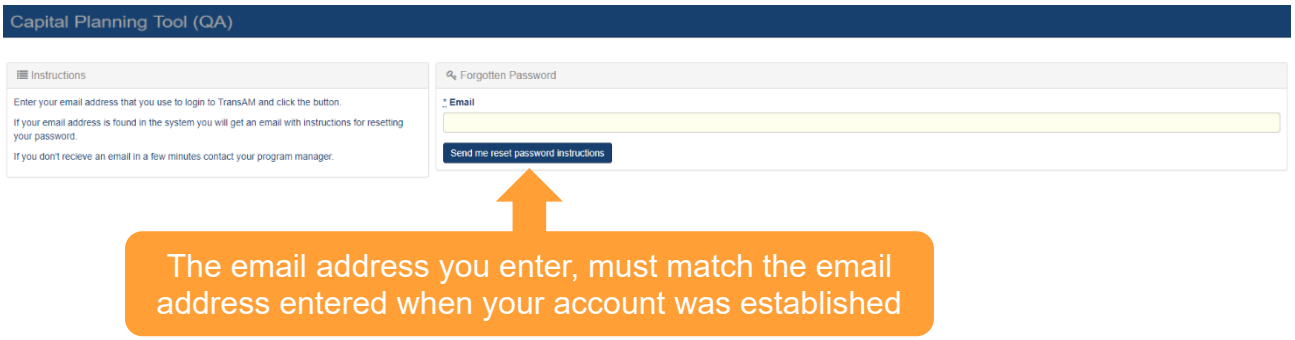
TransAM is an asset management system designed to support the needs of State DOTs, Planning Agencies, and Transit Agencies. The system manages assets of all types, including revenue vehicles, equipment, facilities, and infrastructure. The system stores crucial information about every asset category and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

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

## 1.1 Initial Log In and Password Reset

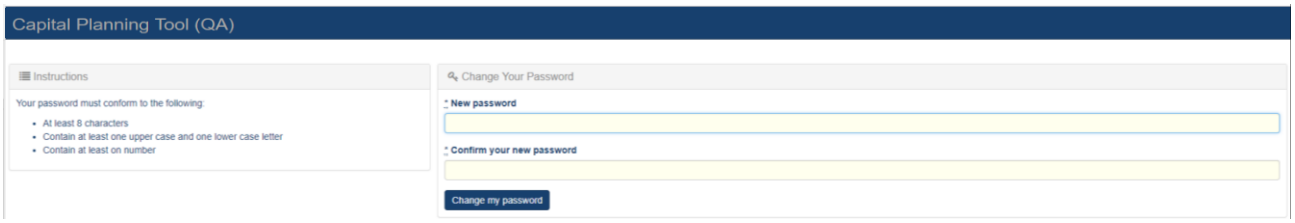
If this is your first time logging in, you should receive an email following the creation of your user account, with a link instructing you to reset your password. Click the link in the email and you will be directed to enter your email address in order to reset your password; enter your email address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

**Figure 1 Password Reset Request Screen**




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

**Figure 2 Set/Reset Password Screen**

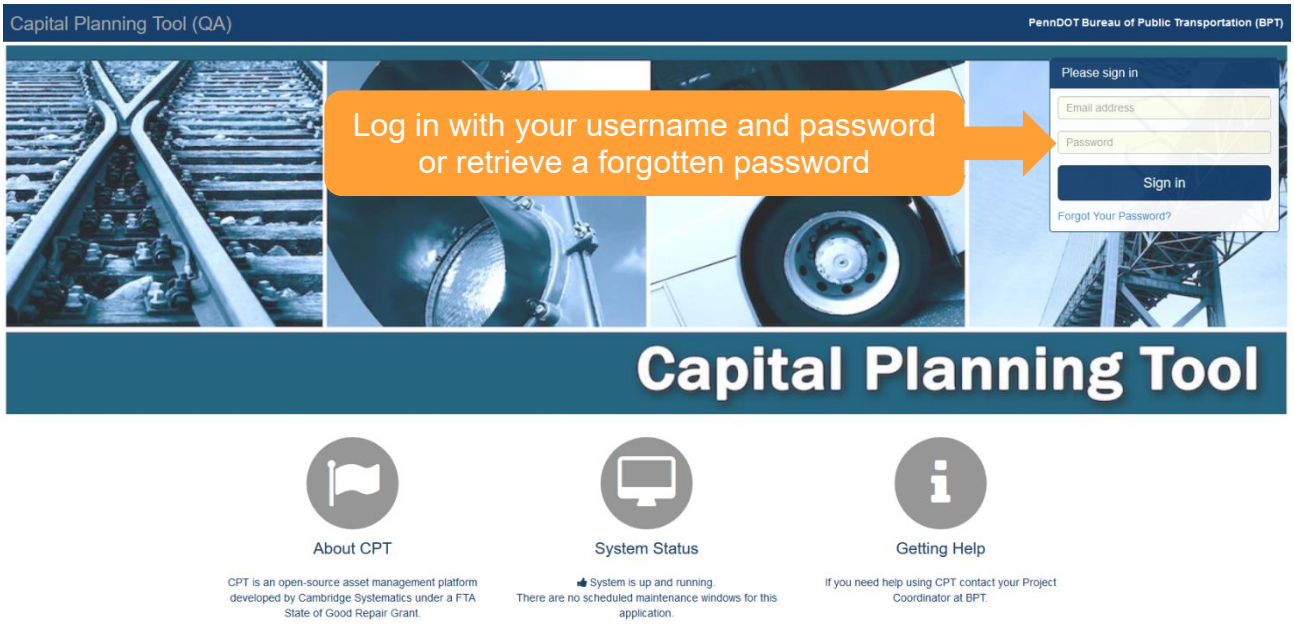


## 1.2 Ongoing Site Access

The system can be accessed via the following URL: https://transam-sfrta.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**



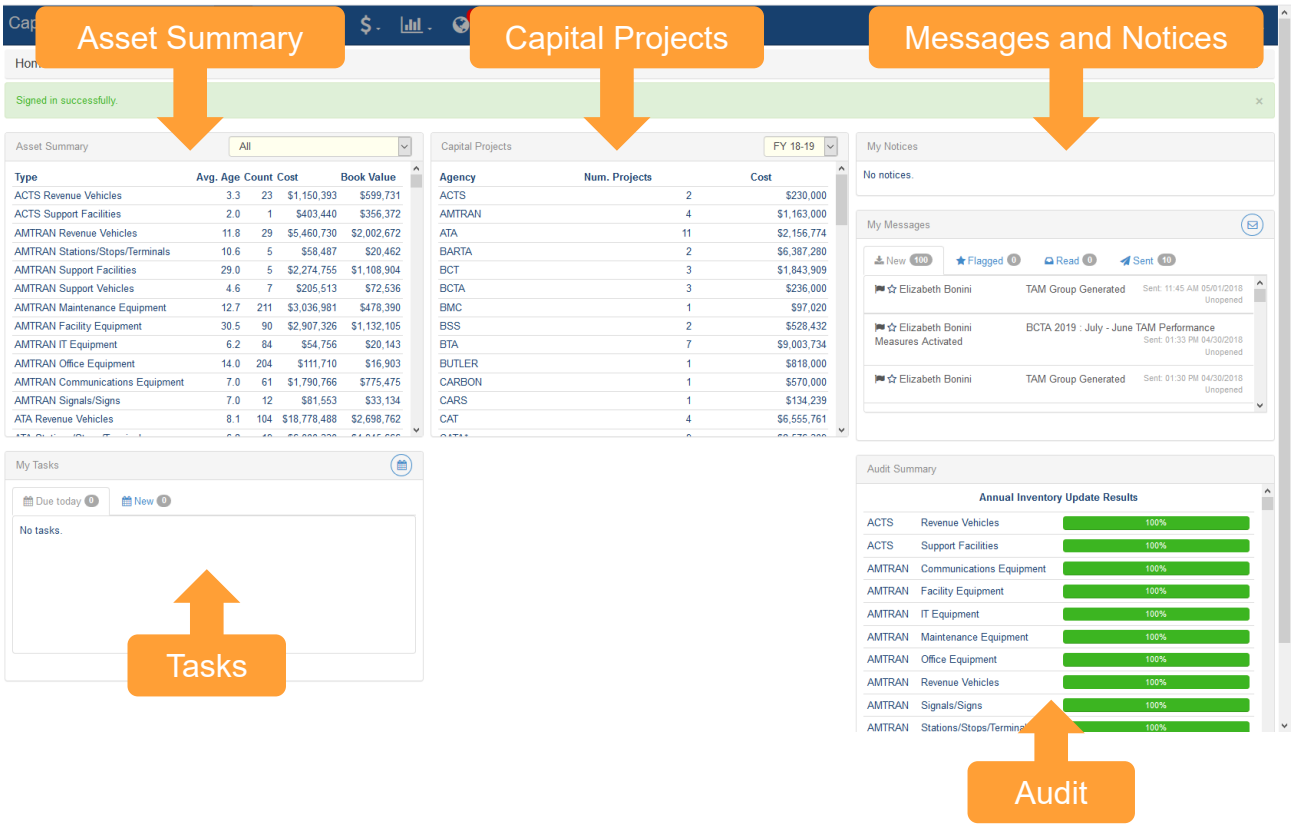
# 2.0 Dashboard

## 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.

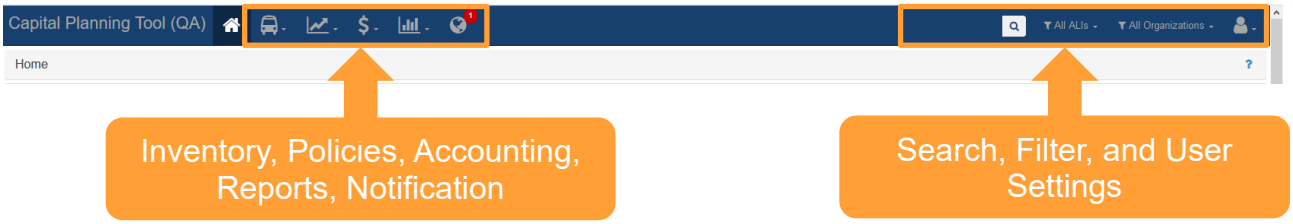
**Figure 4 Dashboard Elements**




## 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

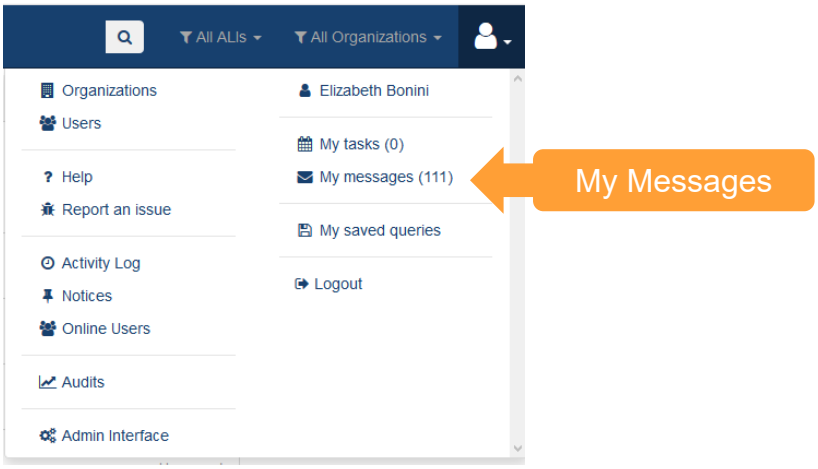
Throughout the site, there are various opportunities to filter data. When you see the following icon it means you can pare down displayed data with a filter.

**Figure 9 Filter Icon**

## 3.3 Messages

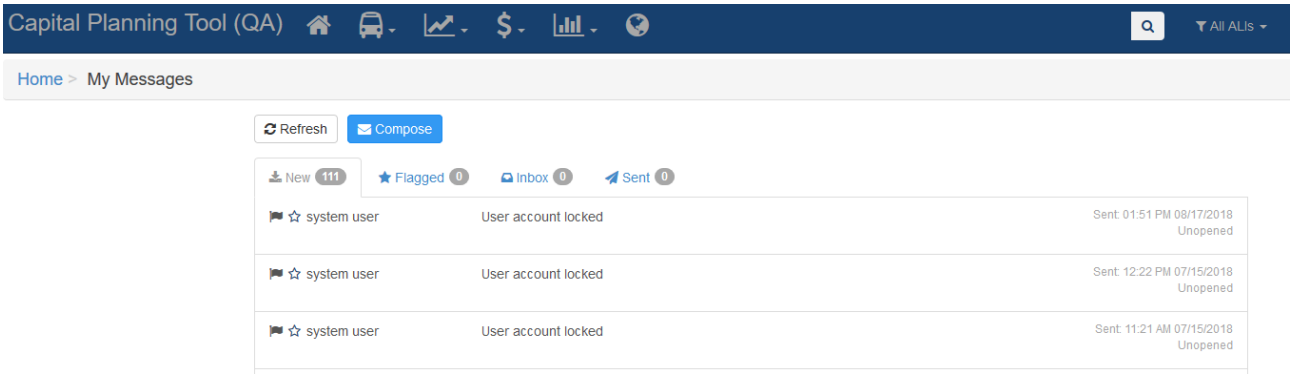
You can access Messages through the User Profile drop down menu.

**Figure 10 User Profile**
*Messages*



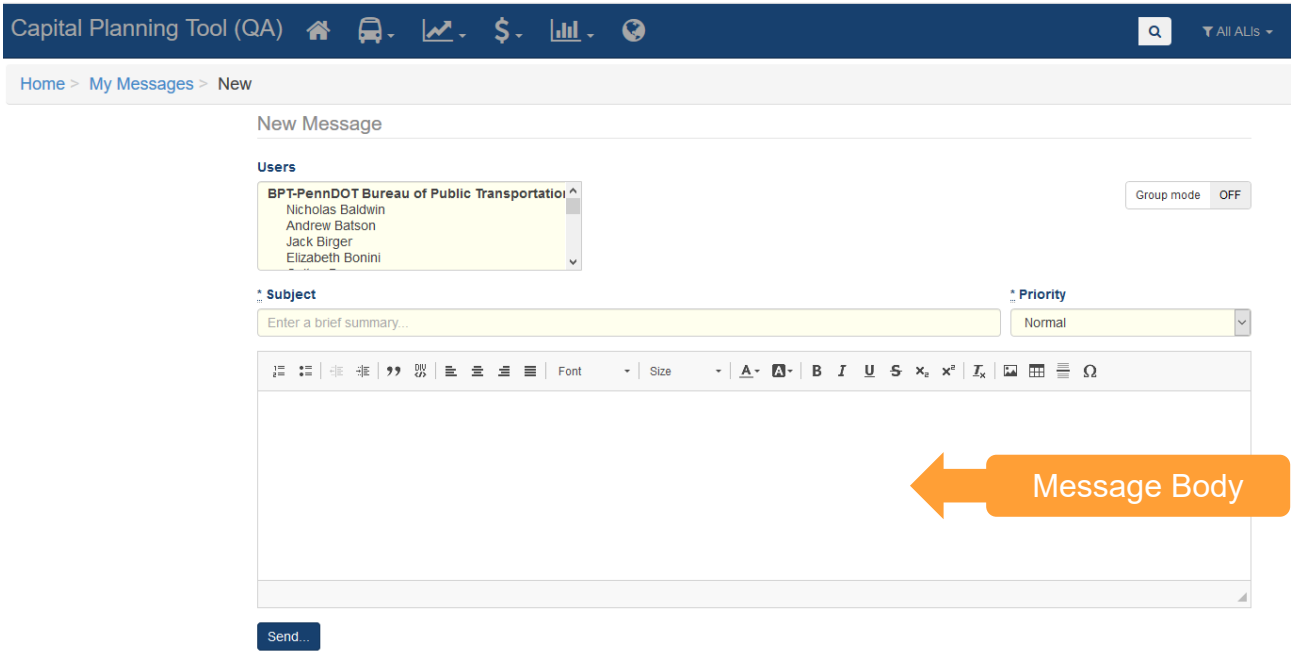

Users are able to send and receive messages to one or more users through the interface.

**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.

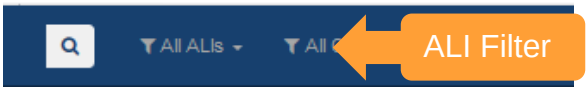
## Figure 12 Message Interface




## 3.4 Activity Line Item (ALI) Filter

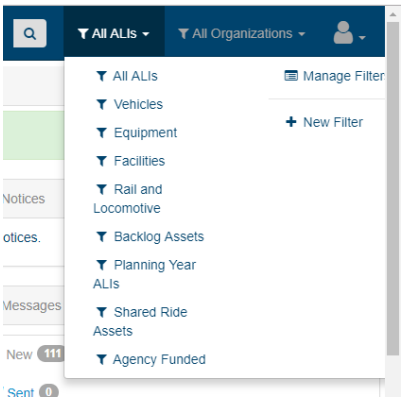
The Activity Line Item (ALI) Filter allows you to pare down on which types of individual funding requests (what are categorized by ALI code) within projects that you can view. This filter only applies to Sections 6 and 7 of this document (Projects and Project Planning).

## Figure 13 ALI Filter



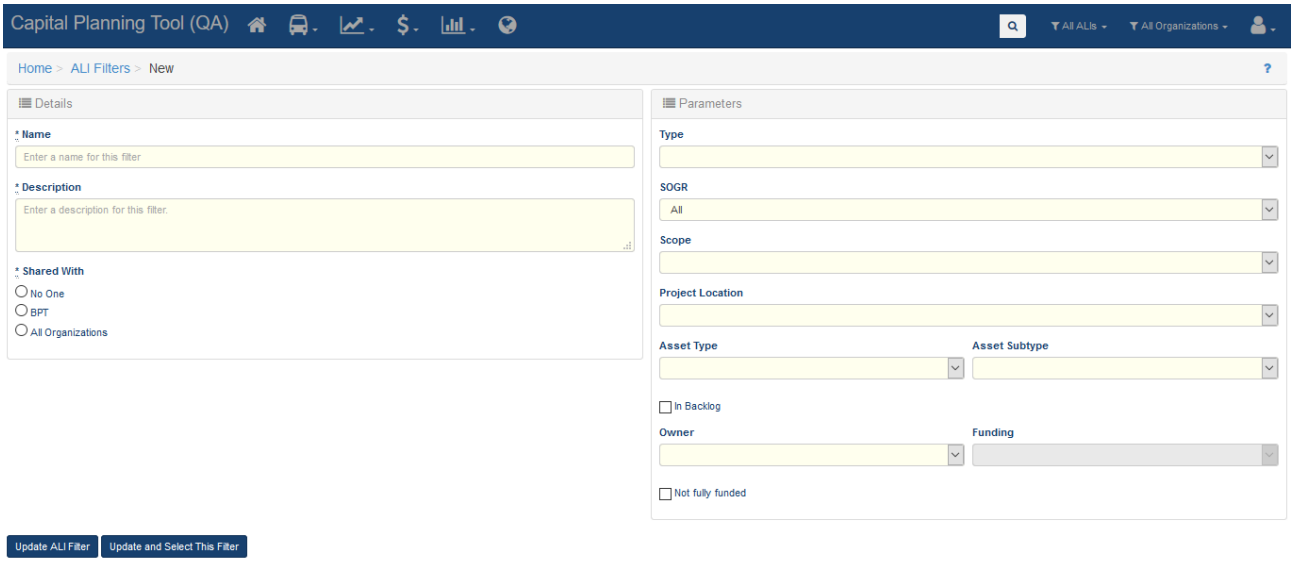

You can filter with prepopulated selections or create your own filters.

## Figure 14 ALI Filters




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

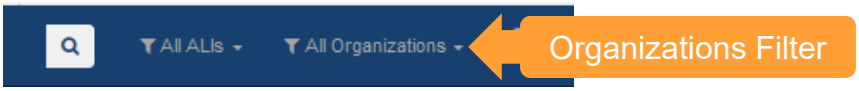
## Figure 15 New ALI Filter




## 3.5 Organizations Filter

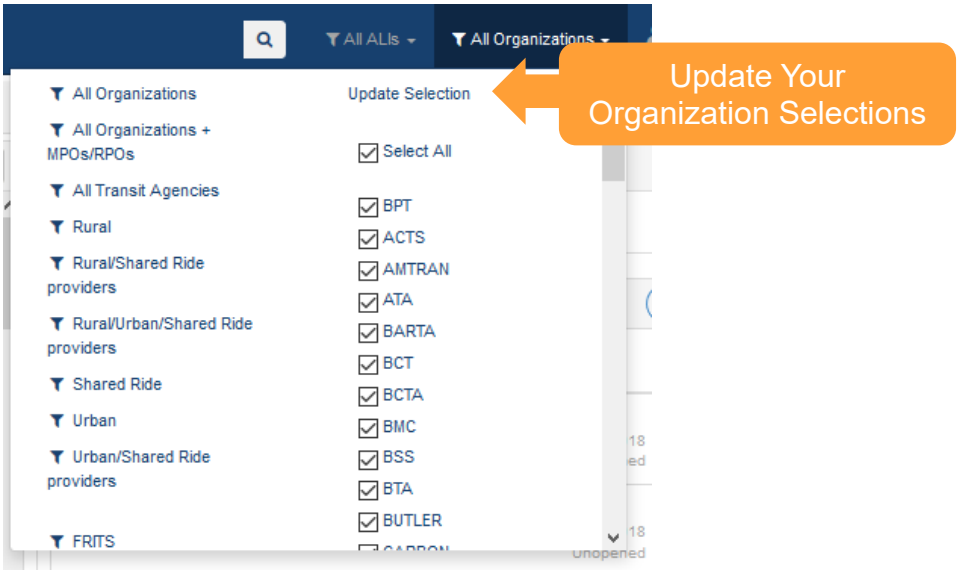
If you have oversight of several organizations, you can limit your scope down to certain organizations, in order to only view organization-specific data across the system.

## 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**

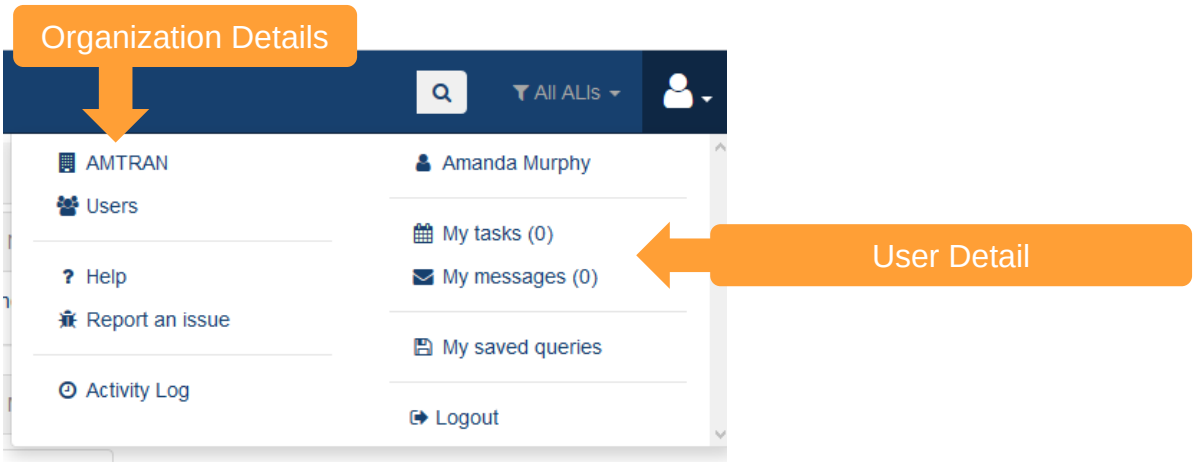
## 3.7 User and Organization Options

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

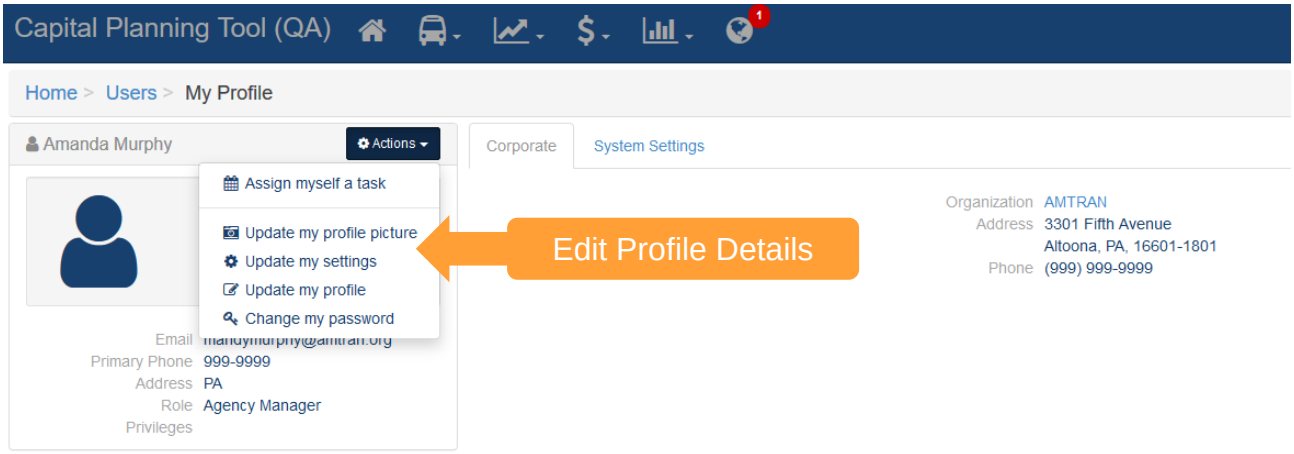



Clicking on your organization name, will allow you to view and edit organization-specific information, and perform certain functions such as adding users.

## Figure 21 Organization Details

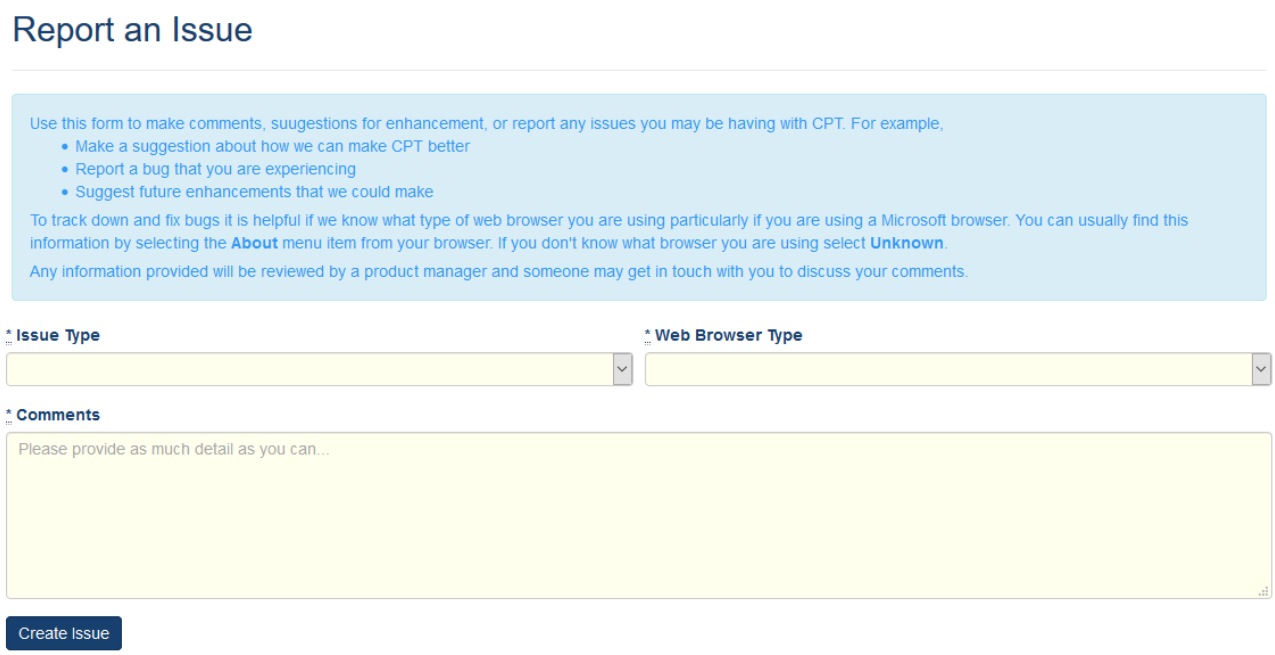
If you click your own name, you can see details about your profile and edit them. You also can assign yourself a task to complete.

## 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.

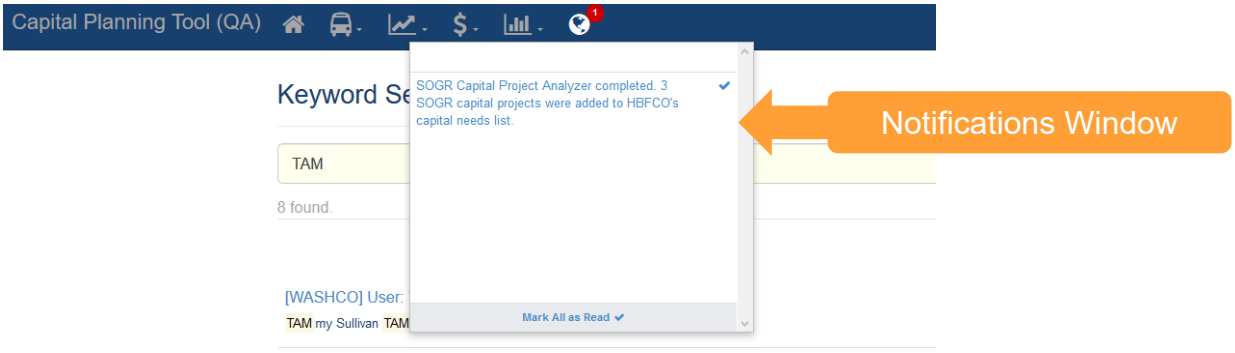
## Figure 23 Report an Issue




## 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.

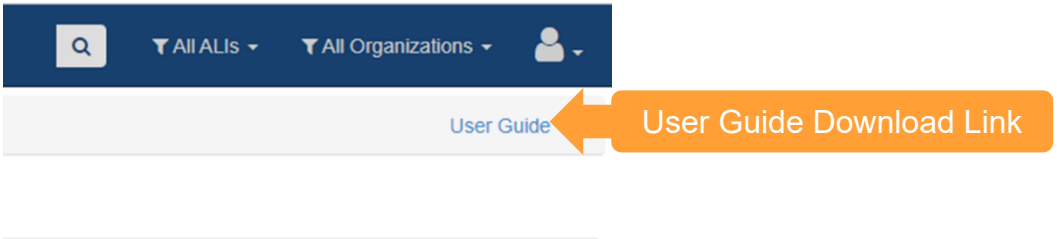
## Figure 24 Notification Drawer




## 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

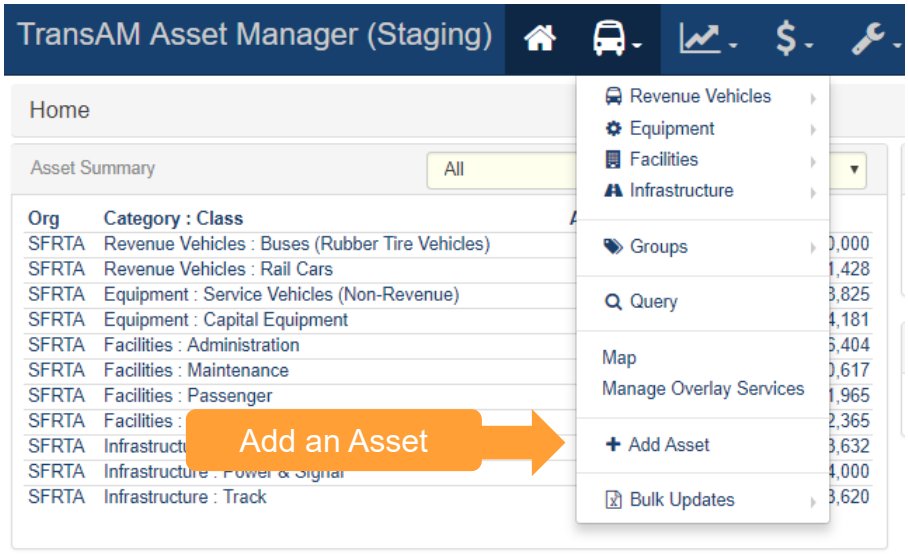
Management of organization assets is carried out through the Asset Inventory dropdown menu. It contains a variety of tools and functions that streamline asset management.

**Figure 26 Asset Inventory Dropdown**

## 4.1 Add an Asset

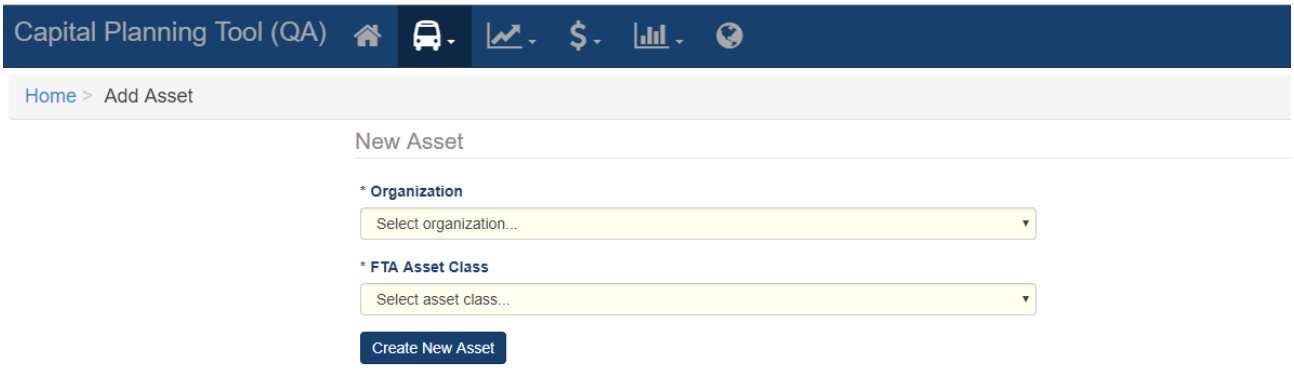
Adding new assets to the asset inventory is simple. First select “Add Asset” from the Asset Inventory dropdown.

**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




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

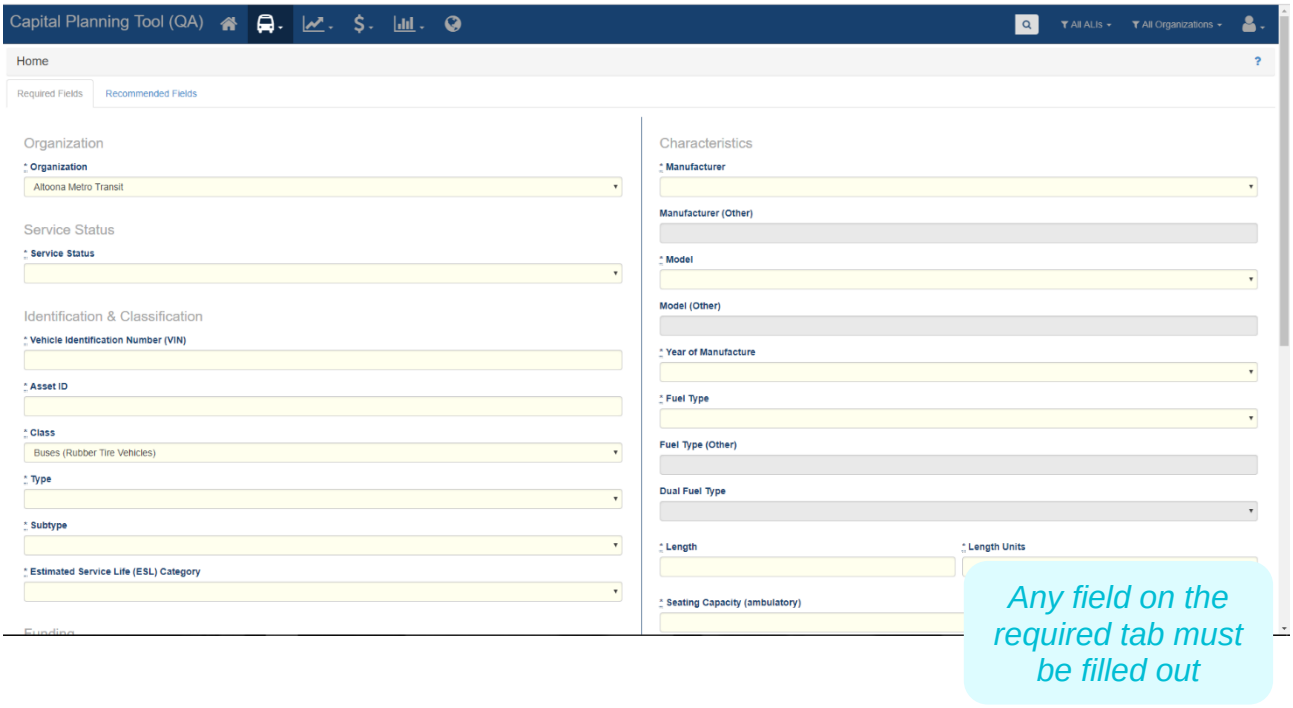
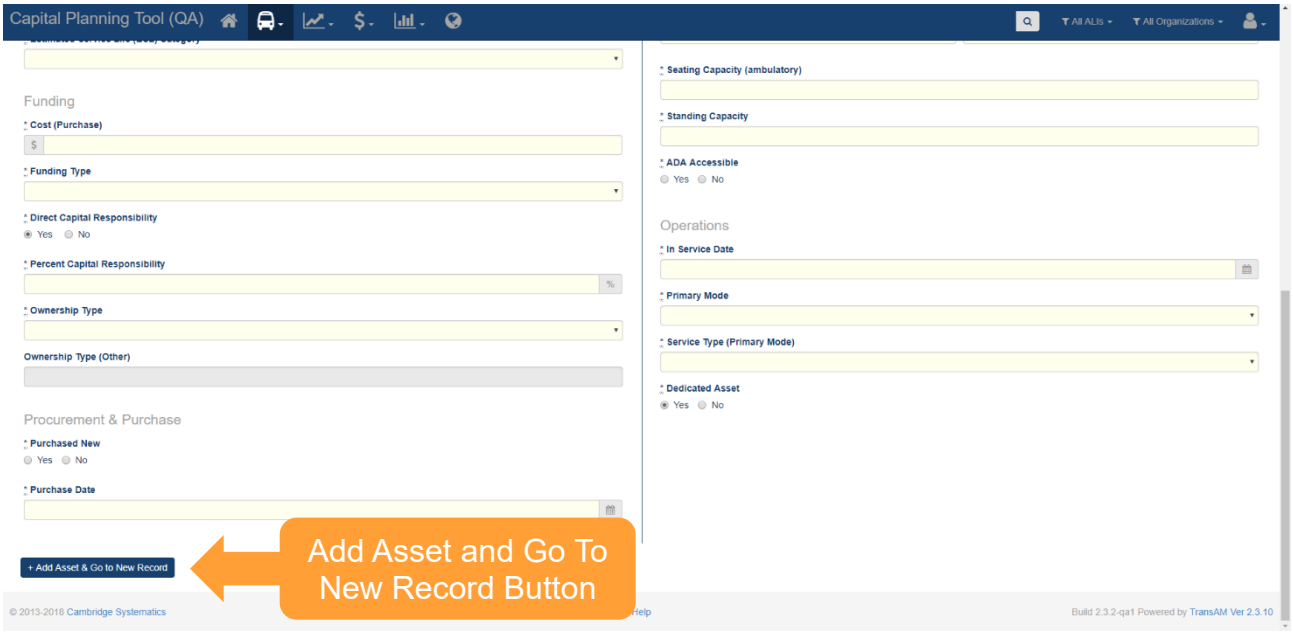


**Figure 30 Add the Asset and Go To The New Record**

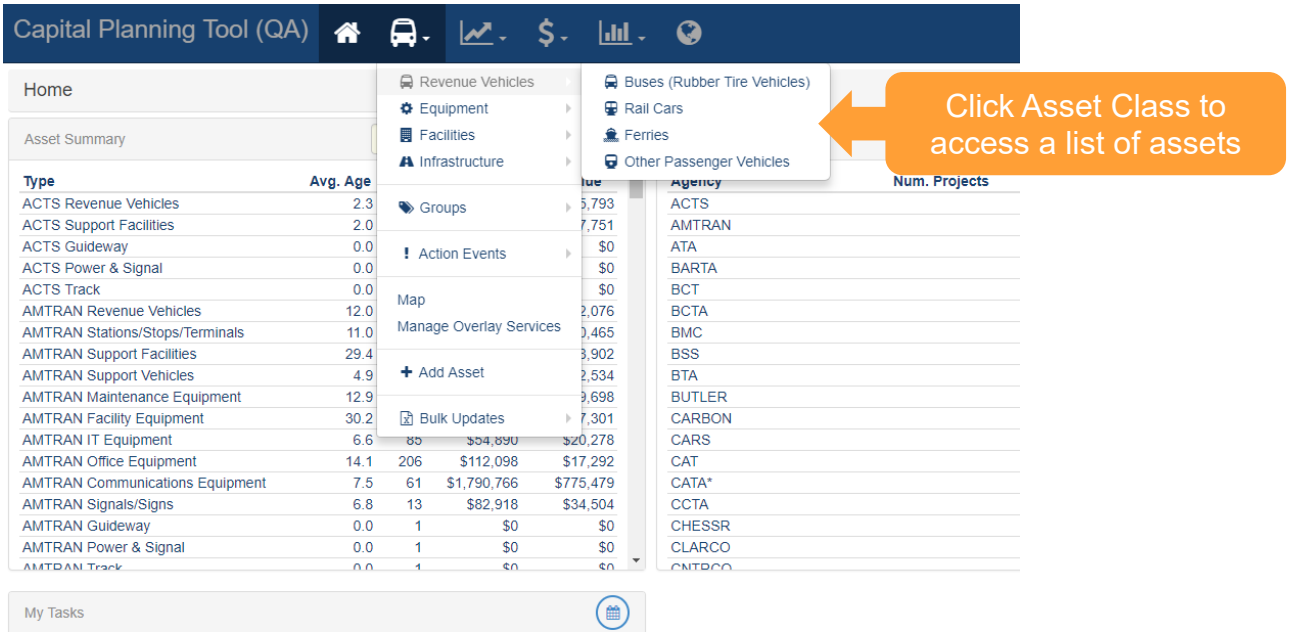



## 4.2 Accessing Existing Assets

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.

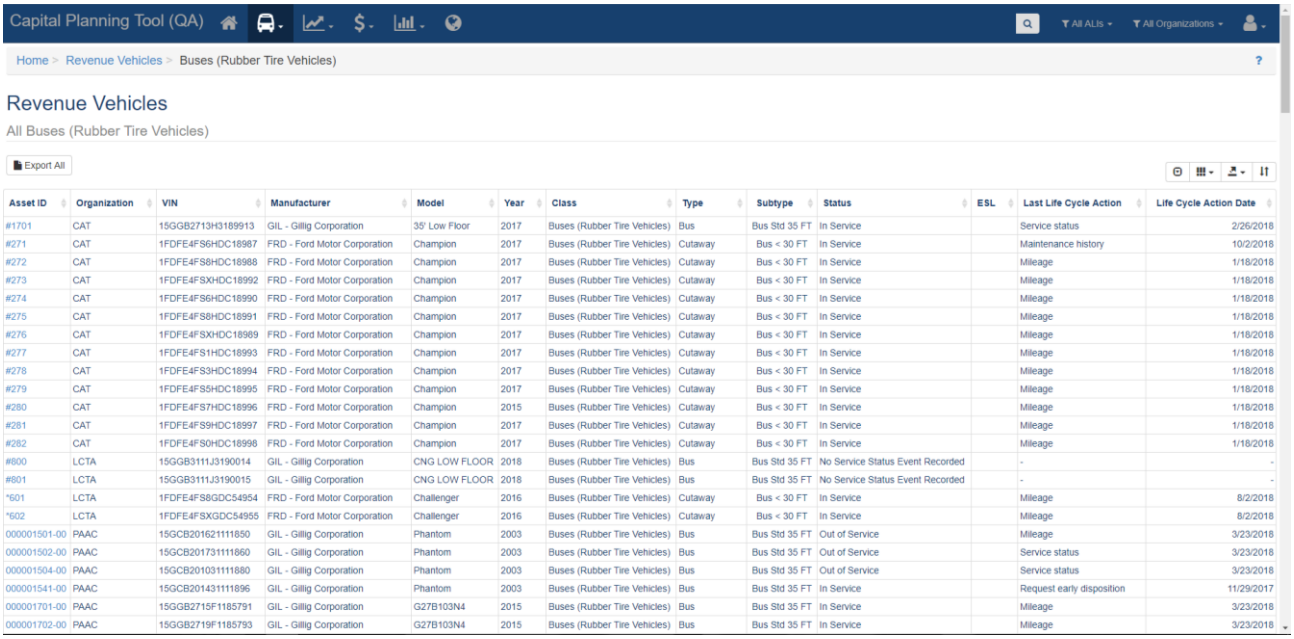
Clicking on an asset class will drill down on the assets an organization possesses within that particular category and class.

## Figure 31 Existing Assets



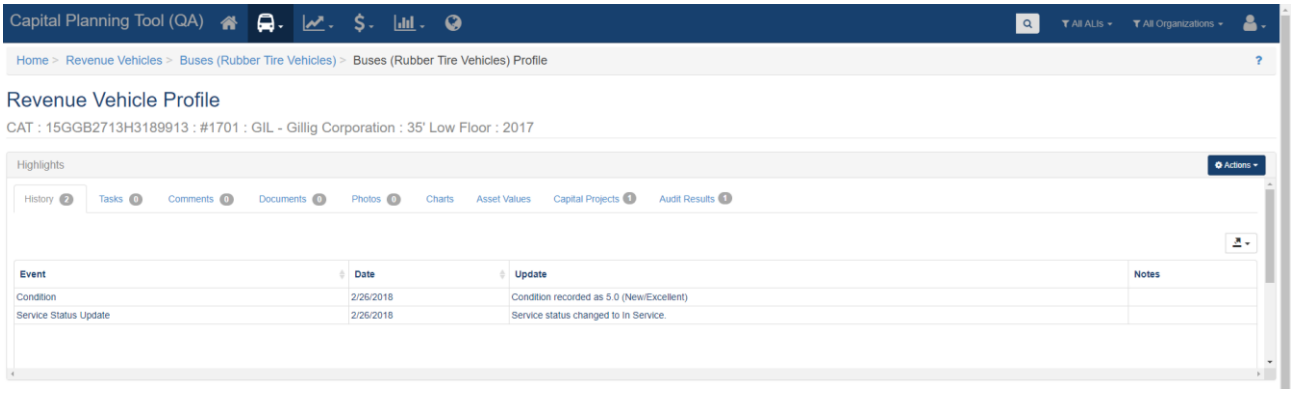

Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

## Figure 32 Existing Asset Interface



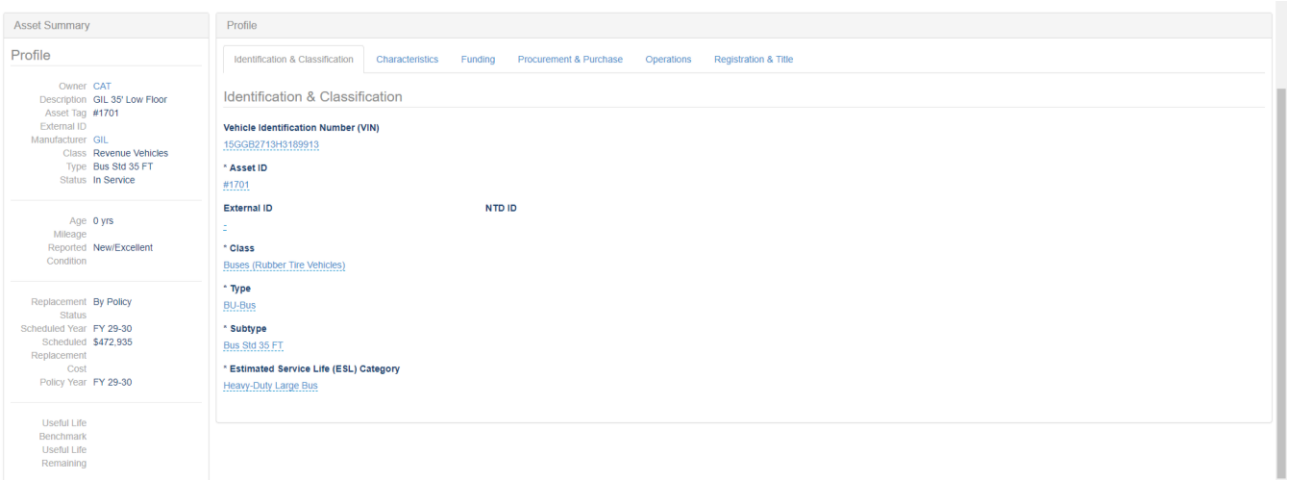

When you access the specific asset record, users can view the highlights section. The highlights sections contains asset summary information such as: a history log, location information, asset charts, asset value information, associated capital projects, and audit results. In addition, tasks, comments,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

## Figure 33 Asset Record: Highlights




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

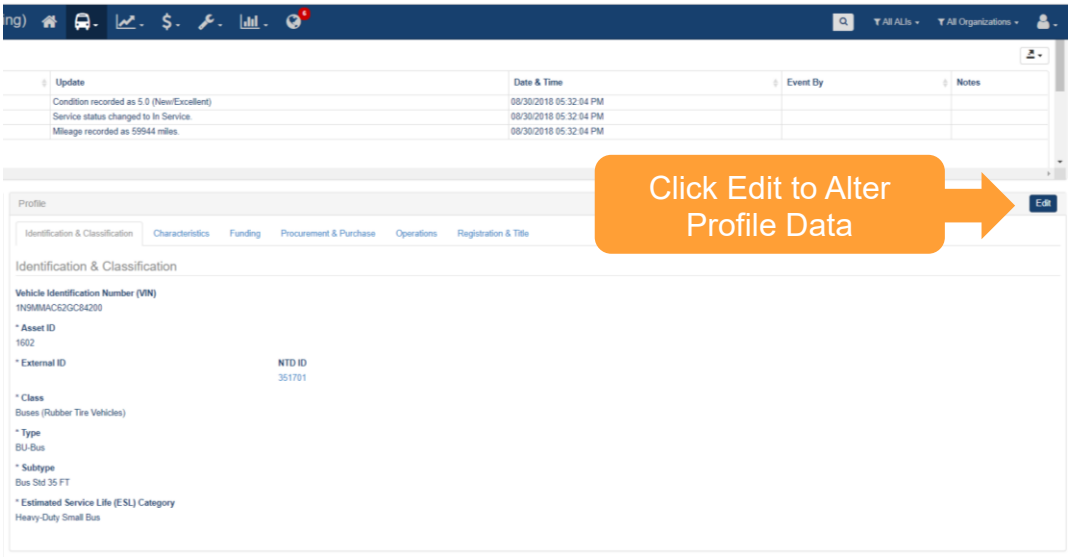
## Figure 34 Asset Record: Profile and Summary




## 4.3 Editing or Updating Existing Asset Profile Data

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

**Figure 35 Editing the Profile of an Existing Asset**



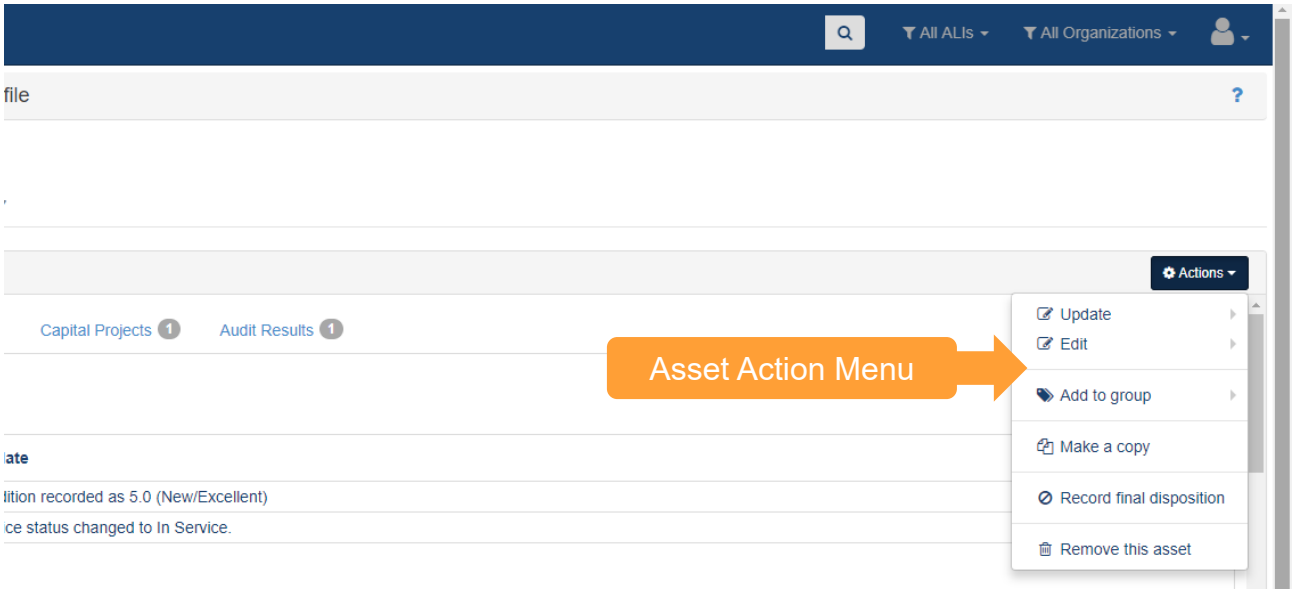

## 4.4 Updating Existing Asset Lifecycle Data

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**

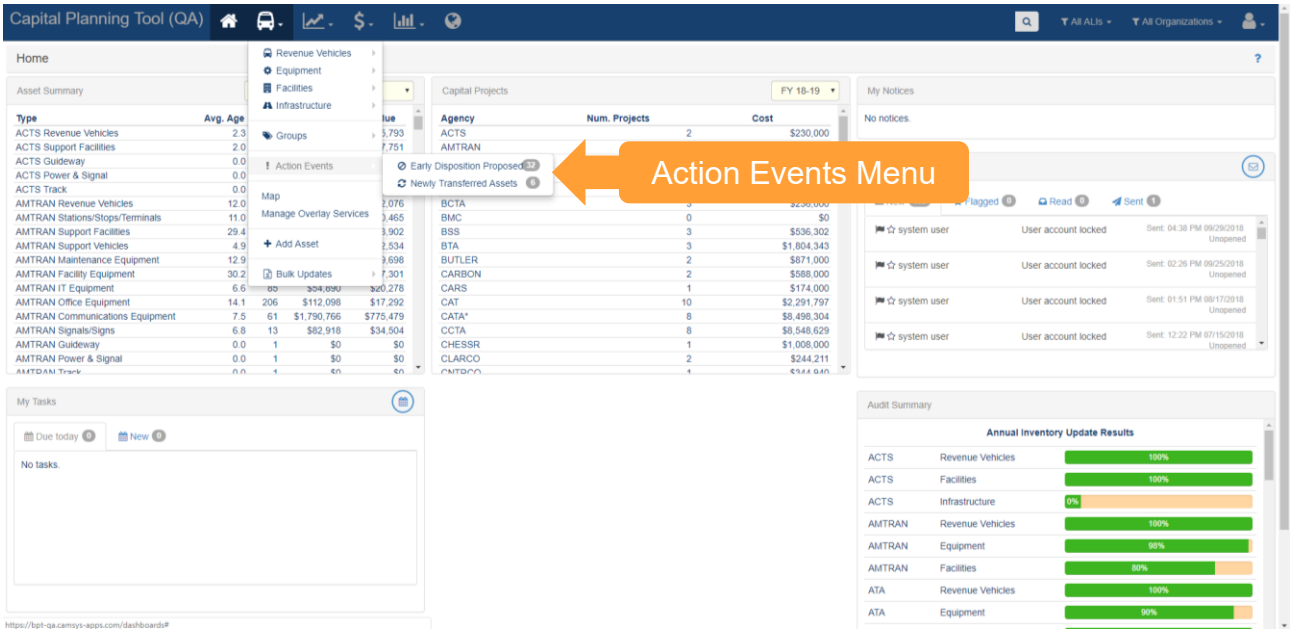



## 4.5 Action Events (Disposition and Transfer Review)

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)

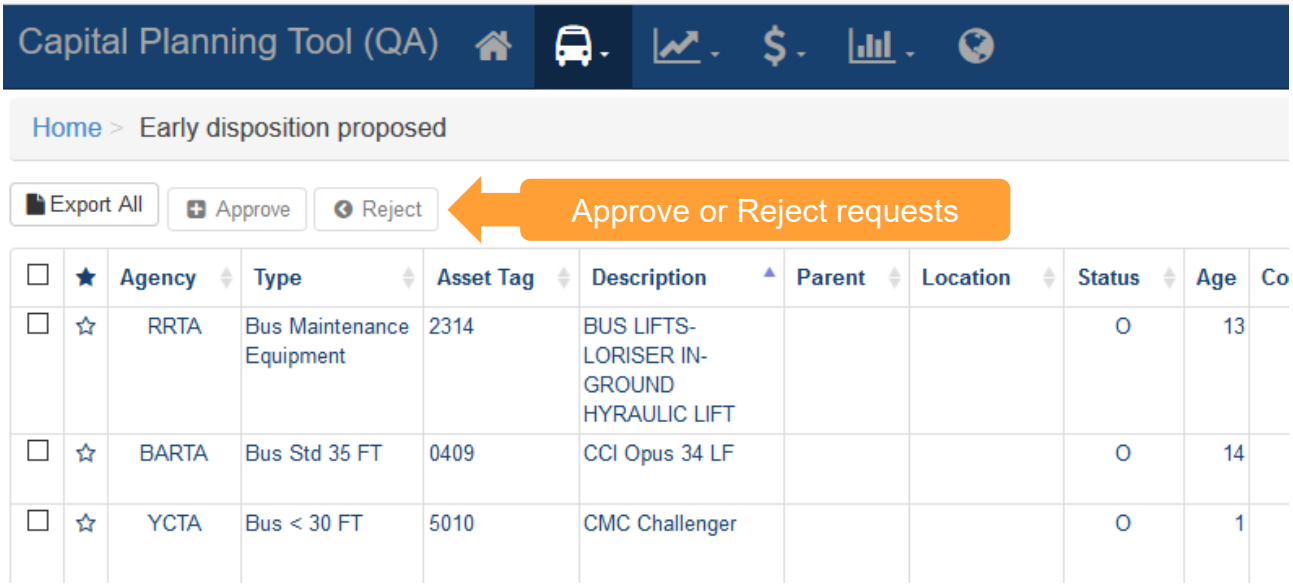



An early disposition instance is where a vehicle fails to fulfill its expected life span. The real world is messy and sometimes mishaps such as accidents occur. Under these circumstances, the asset might require disposition before originally intended.

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

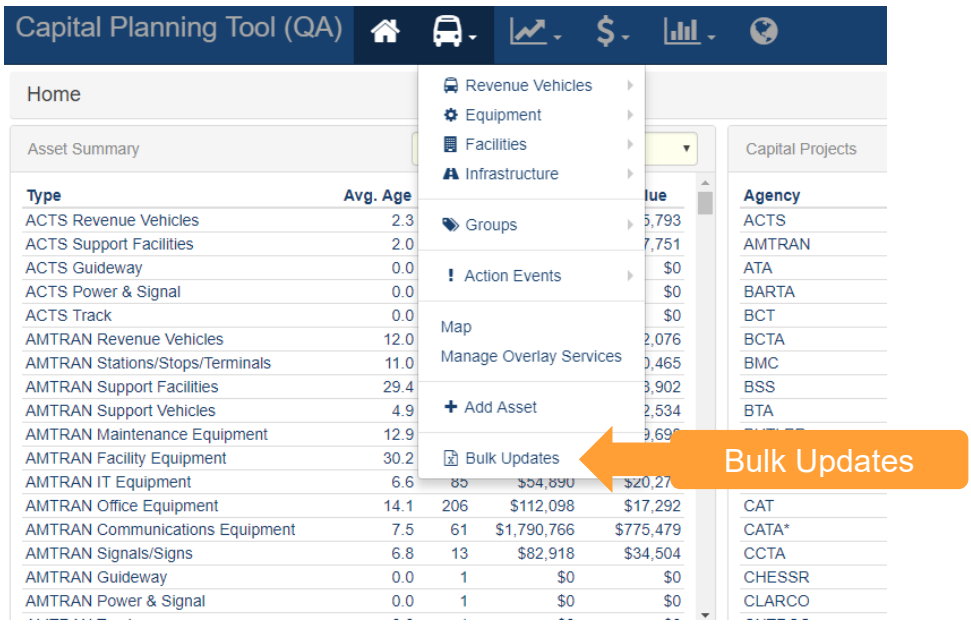
## Figure 38 Early Disposition Requests



## 4.6 Adding or Updating Assets by Bulk Update

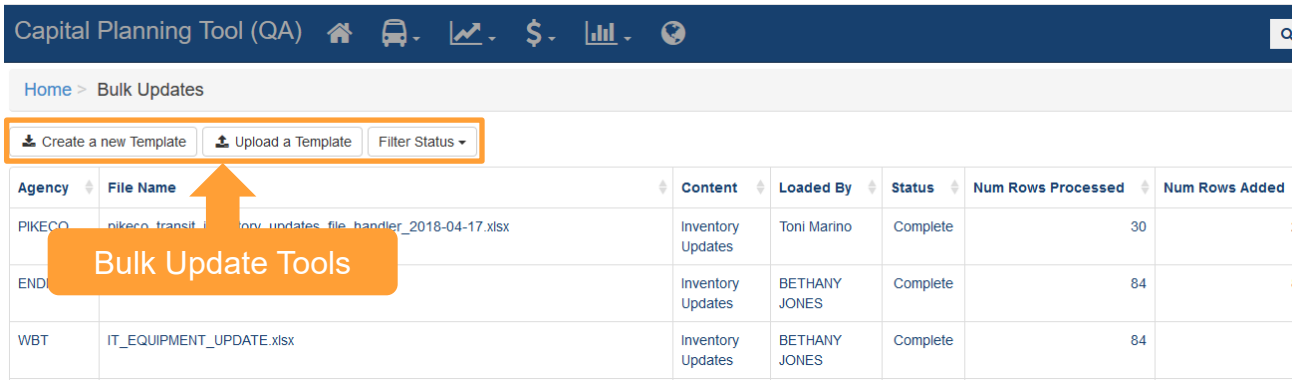
Bulk updates are a faster way to create and edit asset inventories when working with large quantities of asset data. This tool allows users to update service status, condition and mileage of existing inventory, record the last maintenance performed for assets, and identify assets that are going to be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

### Figure 39 Bulk Updates



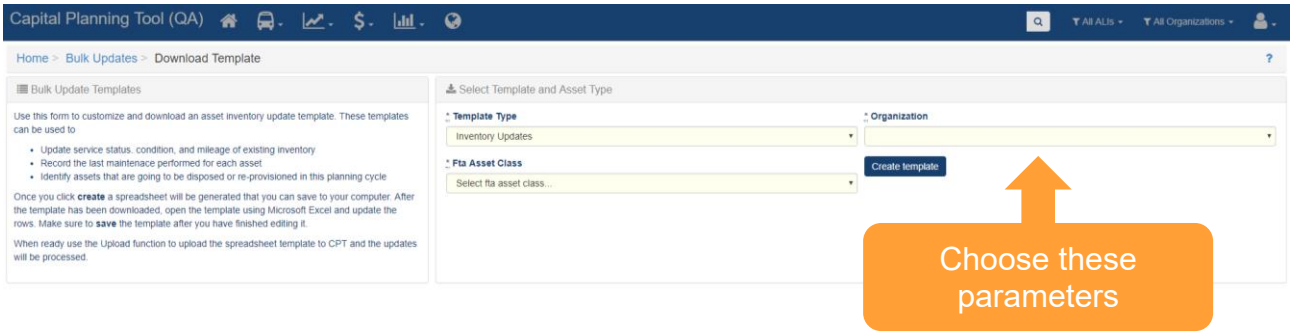

Selecting “Bulk Updates” allows you to Create a new Template, Upload a Template, or see the status of an uploaded template. The main screen also shows previous bulk updates, their content, uploader, status, and stats about the contents of that update and the upload process.

### Figure 40 Bulk Update Tools



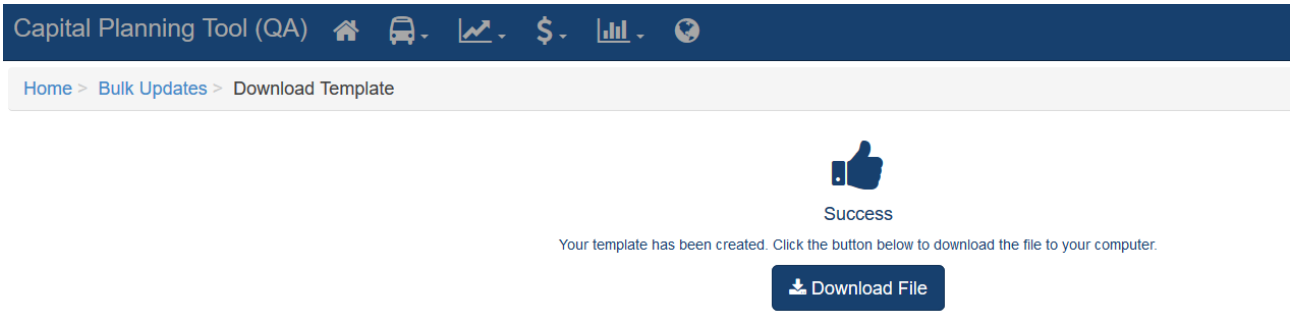

The first step to a bulk update is Creating a Template. Click “Create a new Template”, then select your Template Type, Organization, and Asset Class, then select “Create Template.”

## Figure 41 Bulk Update Details



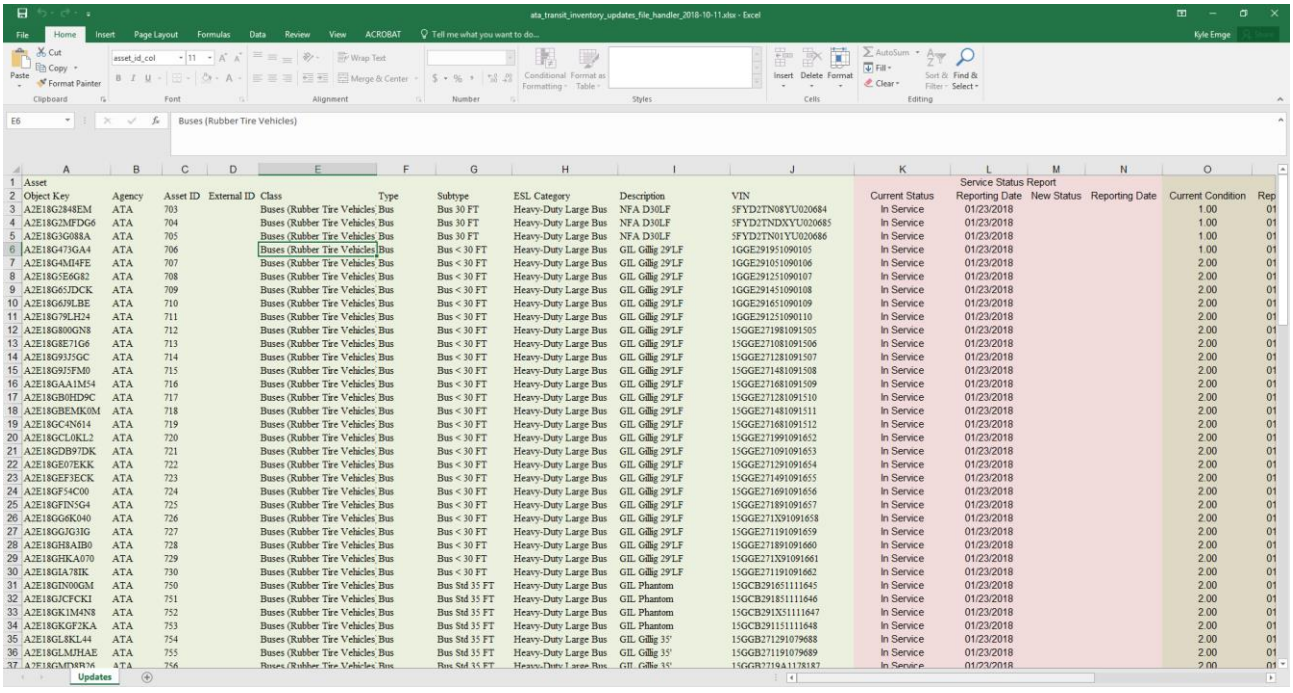

Select “Download File” and save the resulting spreadsheet on your computer.

## Figure 42 Bulk Update Spreadsheet Download




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

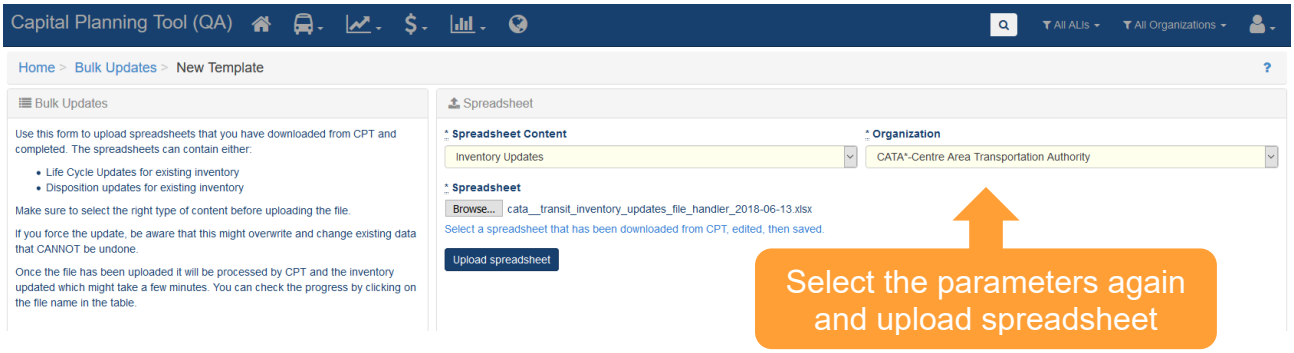
## Figure 43 Bulk Update Spreadsheet




| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Asset | | | | | | | | | | Service Status Report | | | | | |
| 2 | Object Key | Agency | Asset ID | External ID | Class | Type | Subtype | ESL Category | Description | VIN | Current Status | Reporting Date | New Status | Reporting Date | Current Condition | Rep |
| 3 | A2E18G2848EM | ATA | 703 | | Buses (Rubber Tire Vehicles | Bus | Bus 30 FT | Heavy-Duty Large Bus | NFA D30LF | 5FYD2TN08YU020684 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 4 | A2E18G2MFDG6 | ATA | 704 | | Buses (Rubber Tire Vehicles | Bus | Bus 30 FT | Heavy-Duty Large Bus | NFA D30LF | 5FYD2TNDXYU020685 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 5 | A2E18G3G088A | ATA | 705 | | Buses (Rubber Tire Vehicles | Bus | Bus 30 FT | Heavy-Duty Large Bus | NFA D30LF | 5FYD2TN01YU020686 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 6 | A2E18G473GA4 | ATA | 706 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE29195109O105 | In Service | 01/23/2018 | | | 1.00 | 01 |
| 7 | A2E18G4MI4FE | ATA | 707 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE291051090106 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 8 | A2E18G5E6G82 | ATA | 708 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE291251090107 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 9 | A2E18G65JDCK | ATA | 709 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE291451090108 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 10 | A2E18G69LBE | ATA | 710 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE291651090109 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 11 | A2E18G79LH24 | ATA | 711 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 1GGE291251090110 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 12 | A2E18G800GN8 | ATA | 712 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271981091505 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 13 | A2E18G8E71G6 | ATA | 713 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271081091506 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 14 | A2E18G93J5GC | ATA | 714 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271281091507 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 15 | A2E18G9J5FM0 | ATA | 715 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271481091508 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 16 | A2E18GAA1M54 | ATA | 716 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271681091509 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 17 | A2E18GB0HD9C | ATA | 717 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271281091510 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 18 | A2E18GBEMK0M | ATA | 718 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271481091511 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 19 | A2E18GC4N614 | ATA | 719 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271681091512 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 20 | A2E18GCL0KL2 | ATA | 720 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271991091652 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 21 | A2E18GDB97DK | ATA | 721 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271091091653 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 22 | A2E18GE07EKK | ATA | 722 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271291091654 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 23 | A2E18GEF3ECK | ATA | 723 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271491091655 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 24 | A2E18GF54C00 | ATA | 724 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271691091656 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 25 | A2E18GFIN5G4 | ATA | 725 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271891091657 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 26 | A2E18GG6K040 | ATA | 726 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271X91091658 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 27 | A2E18GGJG3IG | ATA | 727 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271191091659 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 28 | A2E18GH8AIB0 | ATA | 728 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271891091660 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 29 | A2E18GHKA070 | ATA | 729 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271X91091661 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 30 | A2E18GIA78IK | ATA | 730 | | Buses (Rubber Tire Vehicles | Bus | Bus < 30 FT | Heavy-Duty Large Bus | GIL Gillig 29'LF | 15GGE271191091662 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 31 | A2E18GIN00GM | ATA | 750 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | 15GCB291651111645 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 32 | A2E18GJCFCK1 | ATA | 751 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | 15GCB291851111646 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 33 | A2E18GK1M4N8 | ATA | 752 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | 15GCB291X51111647 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 34 | A2E18GKGF2KA | ATA | 753 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Phantom | 15GCB291151111648 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 35 | A2E18GL8KL44 | ATA | 754 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Gillig 35' | 15GGB271291079688 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 36 | A2E18GLMJHAE | ATA | 755 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Gillig 35' | 15GGB271191079689 | In Service | 01/23/2018 | | | 2.00 | 01 |
| 37 | A2E18GMD8836 | ATA | 756 | | Buses (Rubber Tire Vehicles | Bus | Bus Std 35 FT | Heavy-Duty Large Bus | GIL Gillig 35' | 15GGB271A1178187 | In Service | 01/23/2018 | | | 2.00 | 01 |

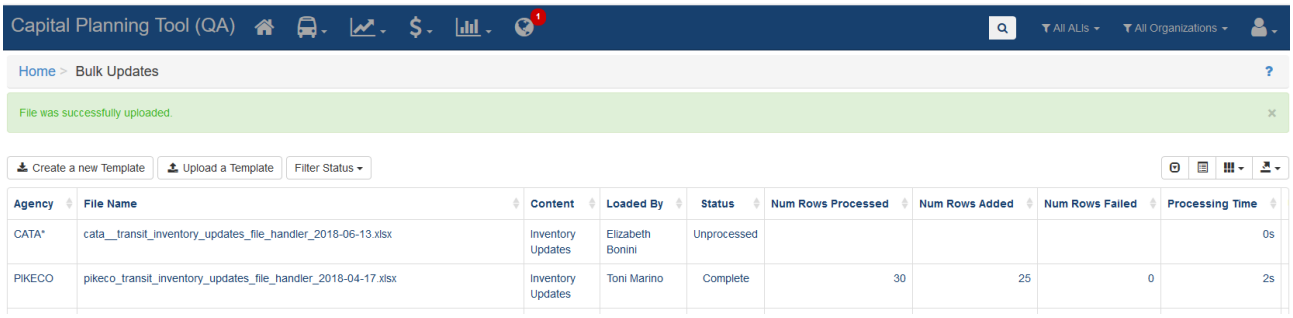
Head back to the Bulk Updates page and at the top select “Upload a Template.” Select the parameters on the right that were used to create the template and then click browse and find your edited spreadsheet. Then click Upload spreadsheet.

## Figure 44 Bulk Update Upload



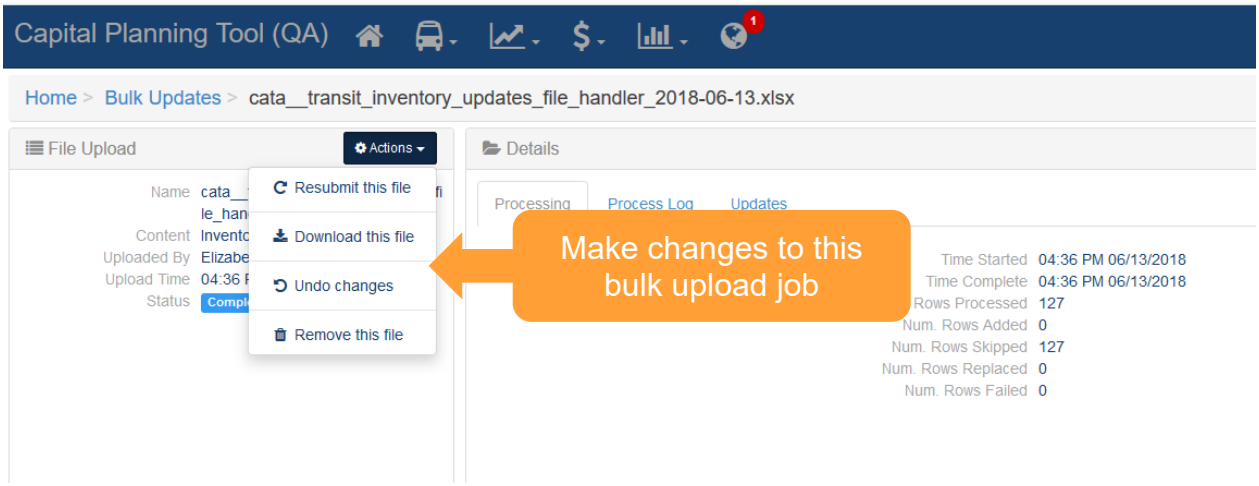

If your file uploads successfully, the main Bulk Update screen should reappear with a “File was successfully uploaded banner” and you should see the most recent update appear at the top of the bulk update history. The system will perform the updates and a new notification will appear in your notification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

## Figure 45 Bulk Upload Processing




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.

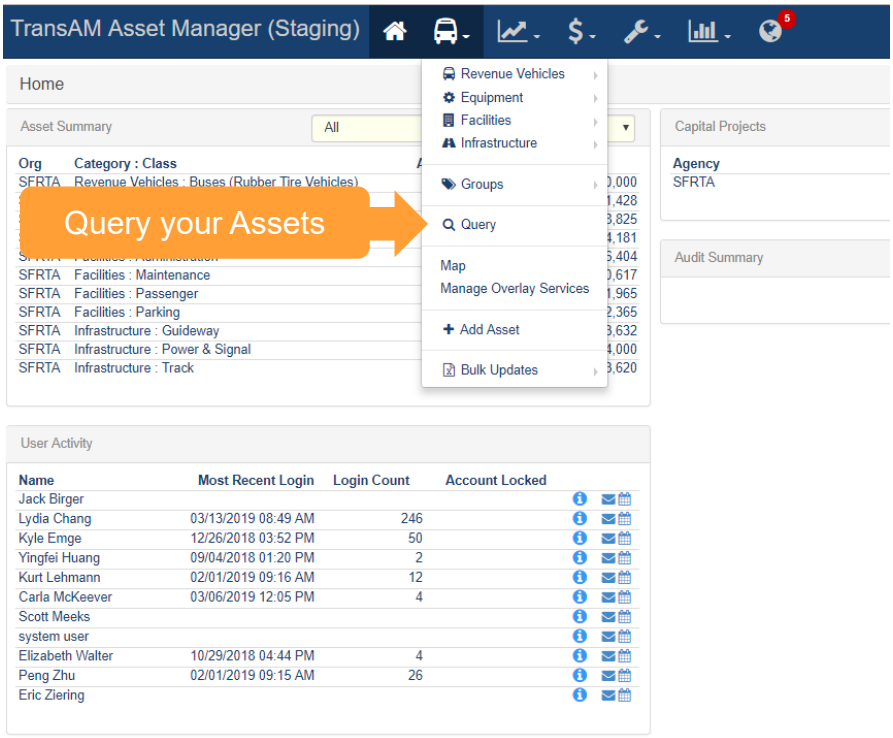
## Figure 46 Bulk Update Edit




## 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.

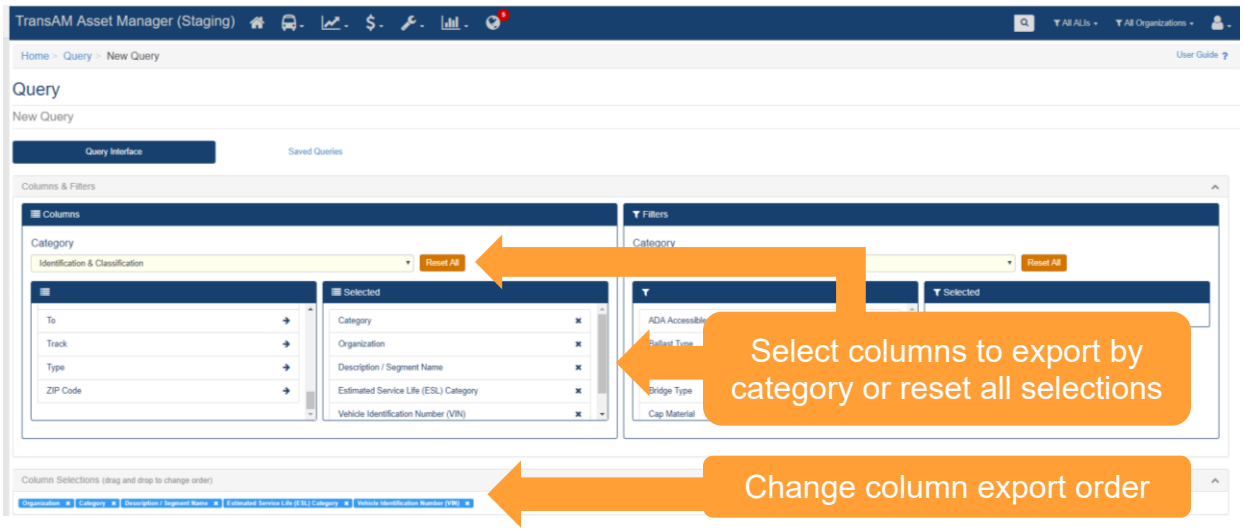
## Figure 47 Asset Query




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

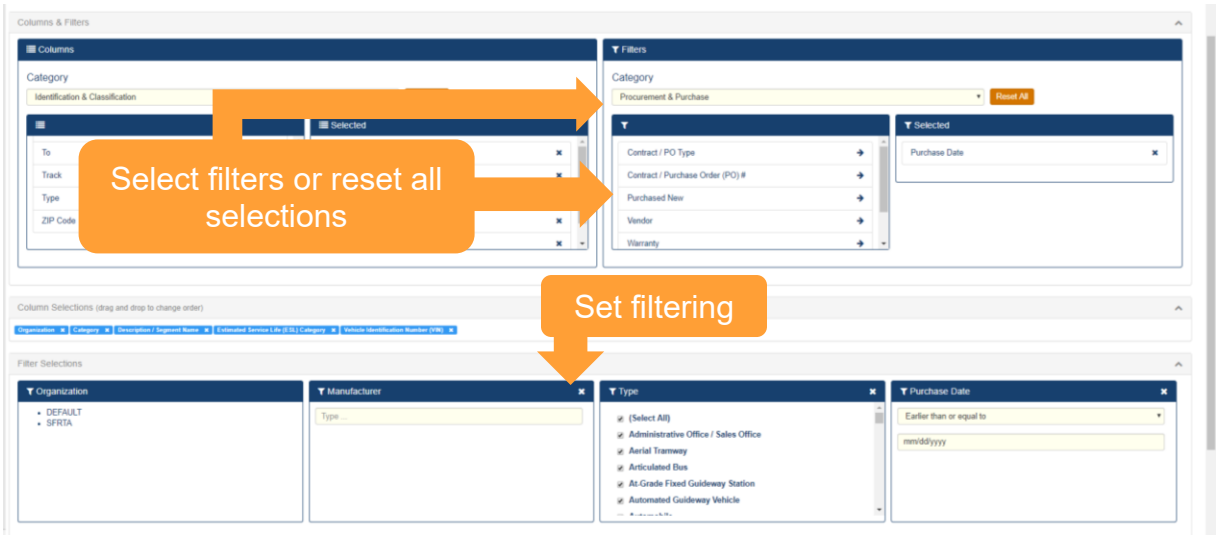
"x" of each selected field. Selected columns appear in the Column Selections panel, and the order each data field is presented in the export can be modified by utilizing drag and drop functionality. Organization and category data fields are always added as default selections, and all selections can be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

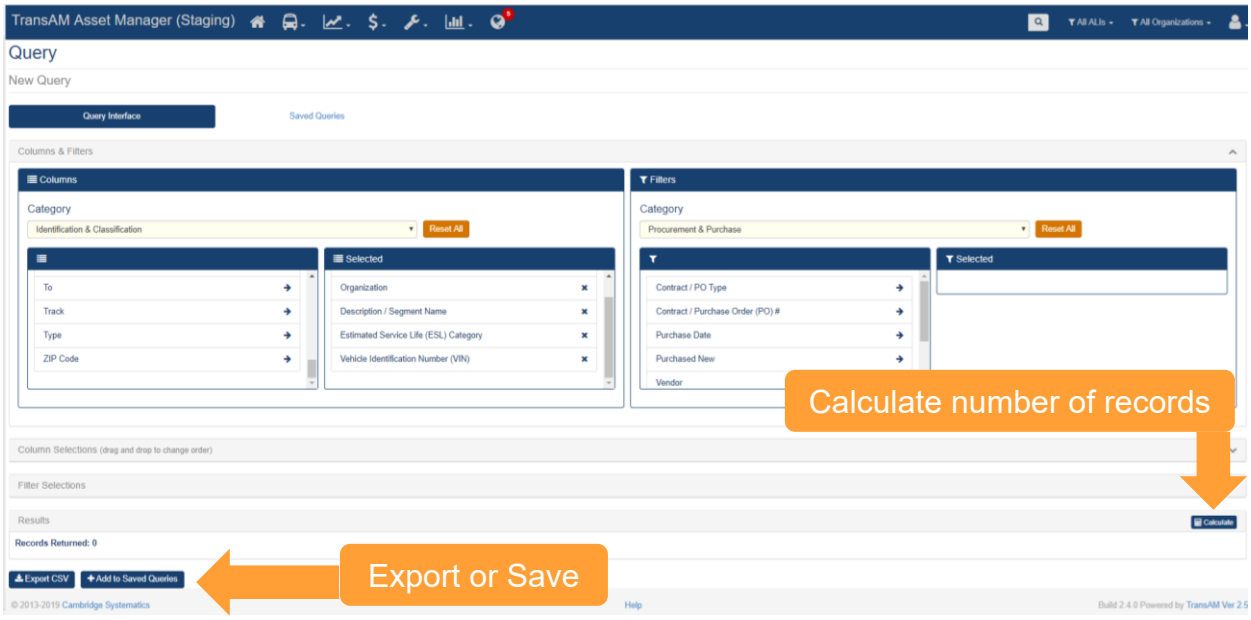
## Figure 49 Filter Selection




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.

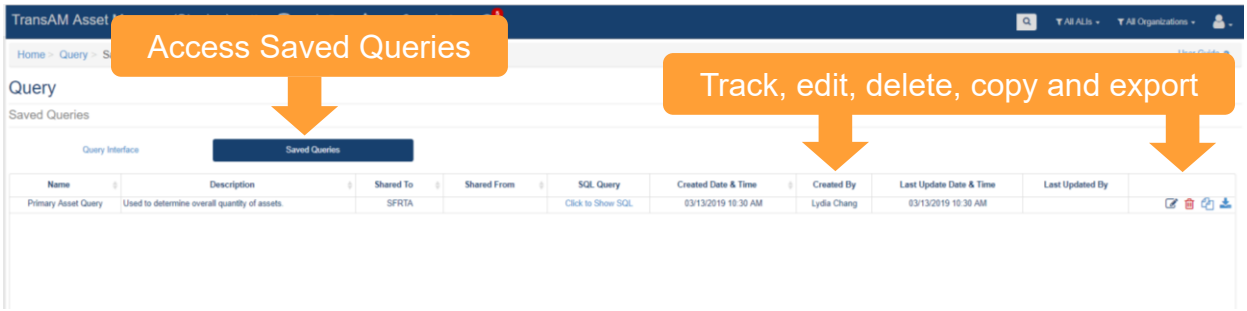
## Figure 50 Calculate, Export or Save




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.

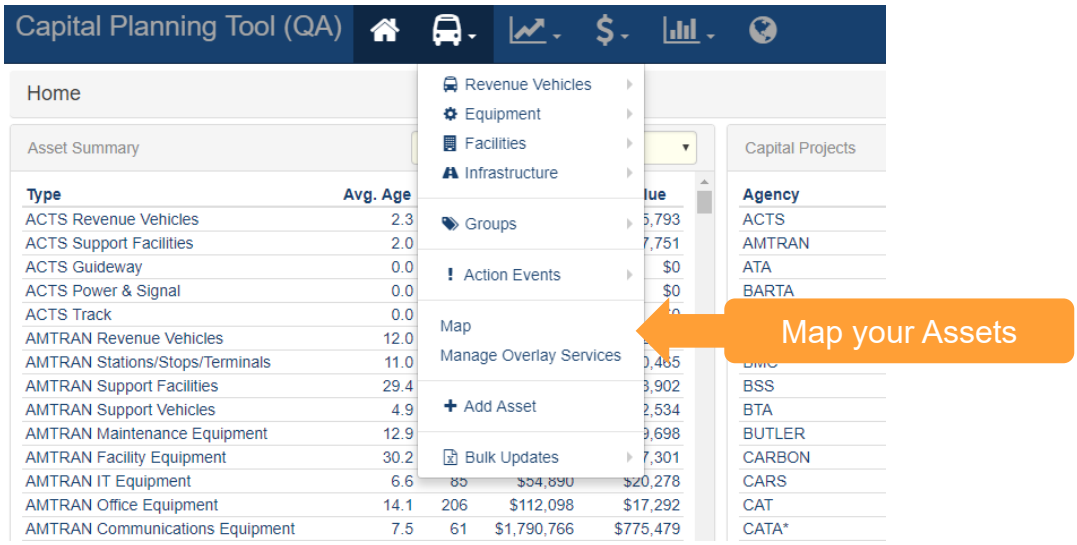
## Figure 51 Saved Queries



## 4.8 Map

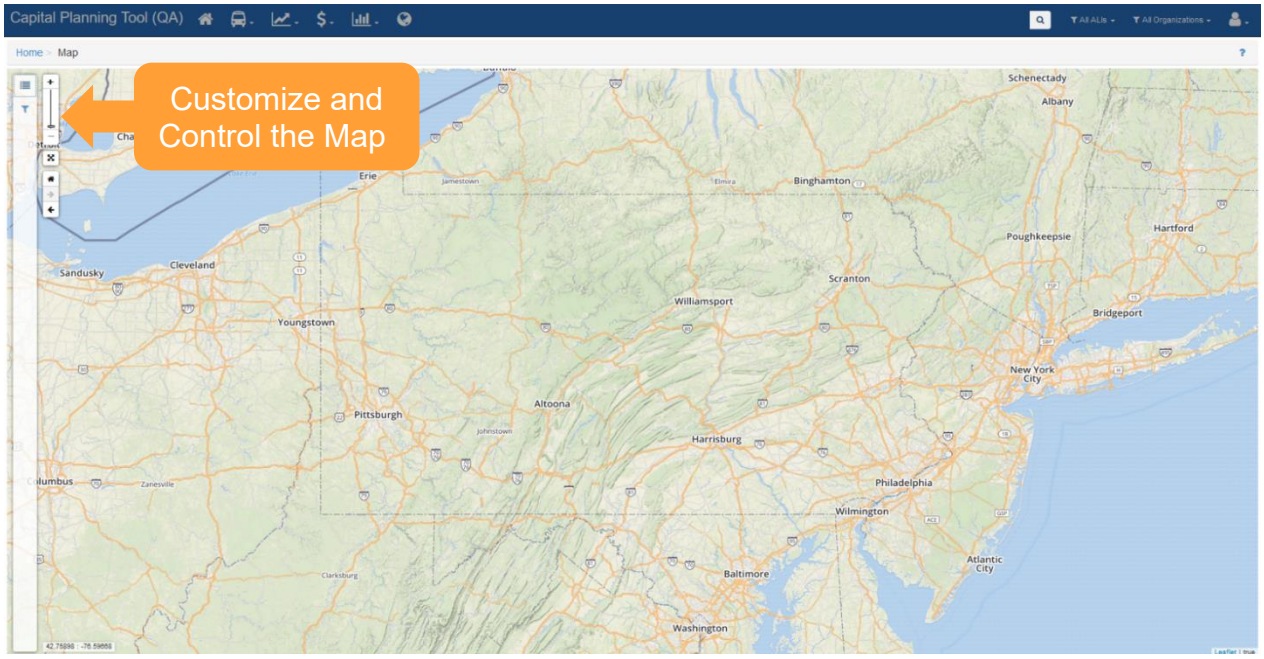
The system provides the ability to overlay asset locations on a map.

### Figure 52 Asset Map



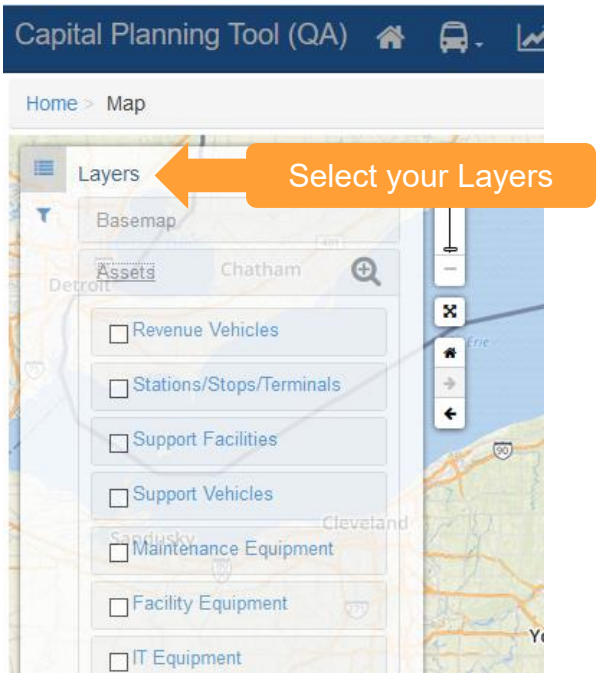

The map has several key features. You can customize the map from the two icons in the bar on the left of the map.

### Figure 53 Map Customization



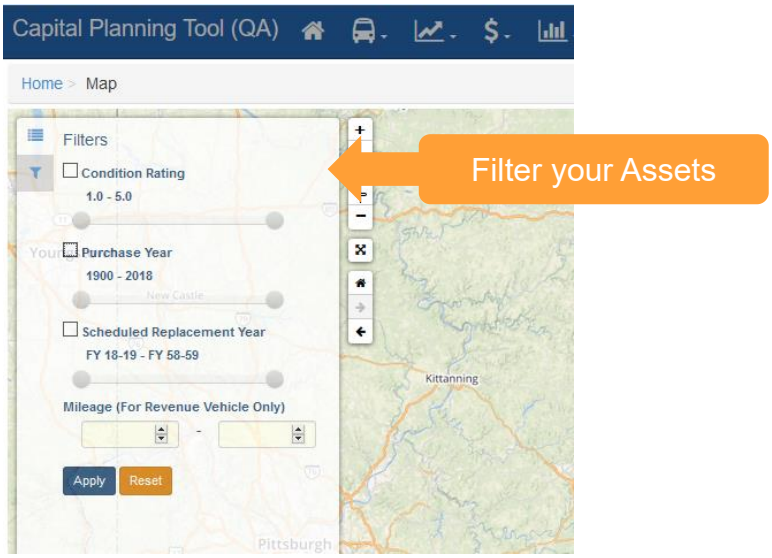

Clicking the top icon allows you to select which layers to display on the map. You can select a default map, the Esri streets map, the Esri Satellite map, or the Esri topographic map as your basemap. Clicking assets will allow you to specify which asset types you wish to display on the map.

## Figure 54 Map Layers



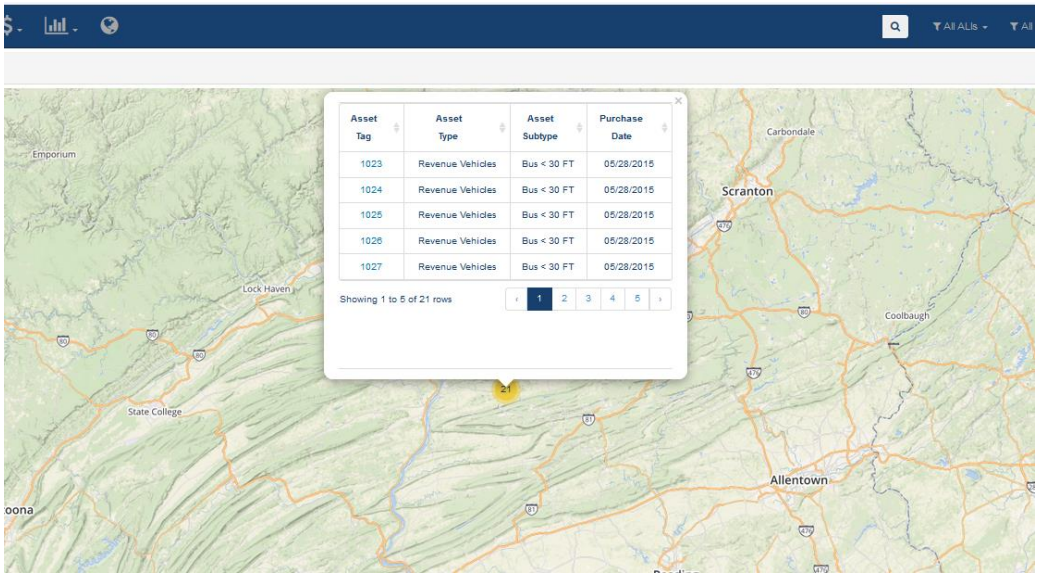

Clicking the filter icon will allow you to pare down the assets that are displayed on the map.

## Figure 55 Map Filter




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

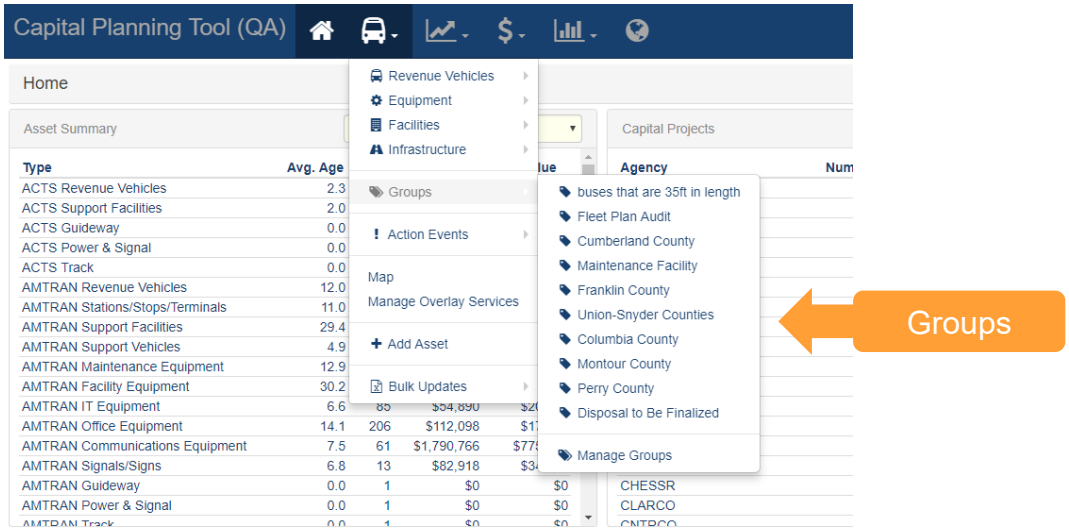
## Figure 56 Map Asset Details




## 4.9 Groups

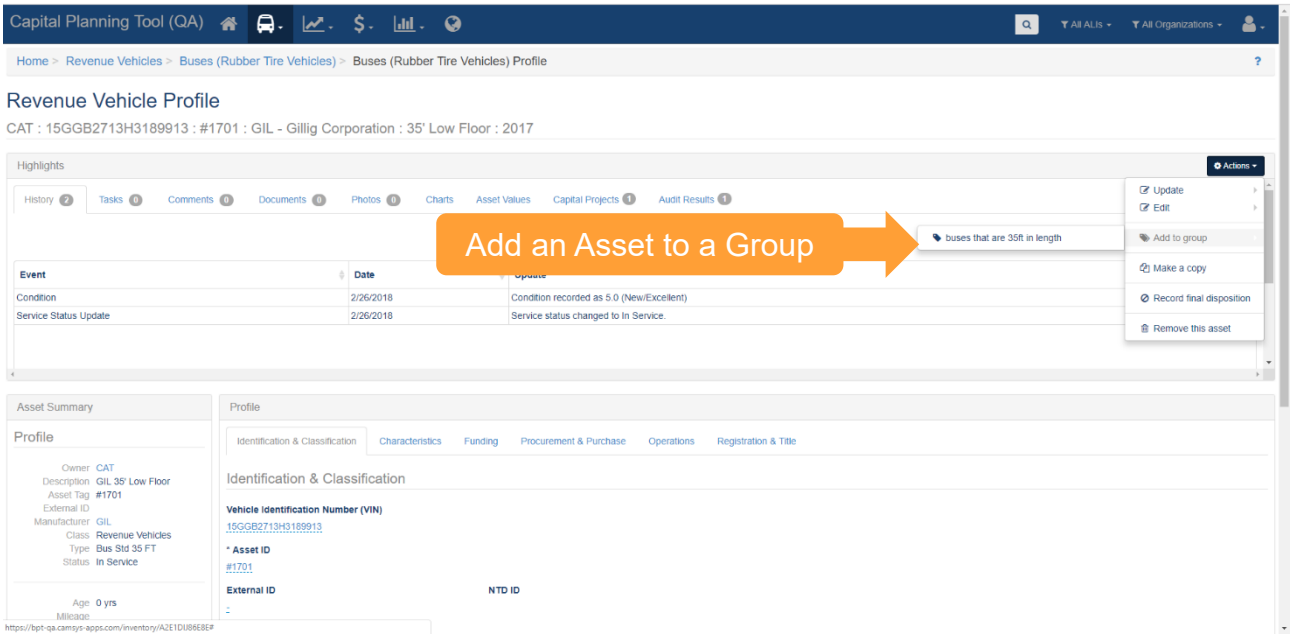
Agencies can create an on-the-fly collection of assets called groups so that they can quickly recall commonly viewed assets all at once. They can be accessed from the Asset Inventory Menu.

## Figure 57 Asset Groups




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

## Figure 58 Adding an Asset to a Group



# 5.0 Maintenance

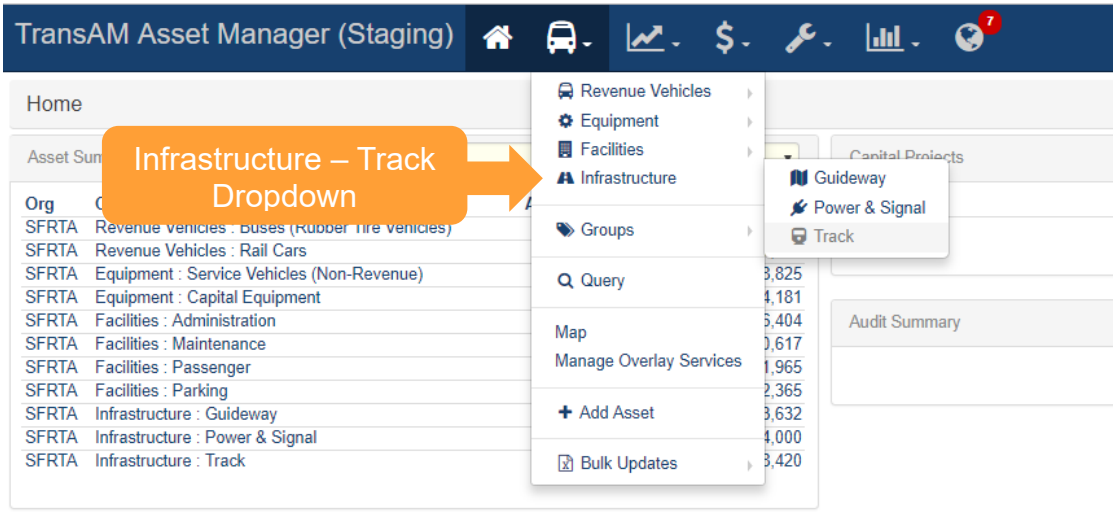
Maintenance of assets is carried out through the Maintenance dropdown menu. Currently, the Maintenance section includes the Performance Restriction feature, which only applies to Infrastructure – Track assets. Additional features will be added to the Maintenance section in the future.

## 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.

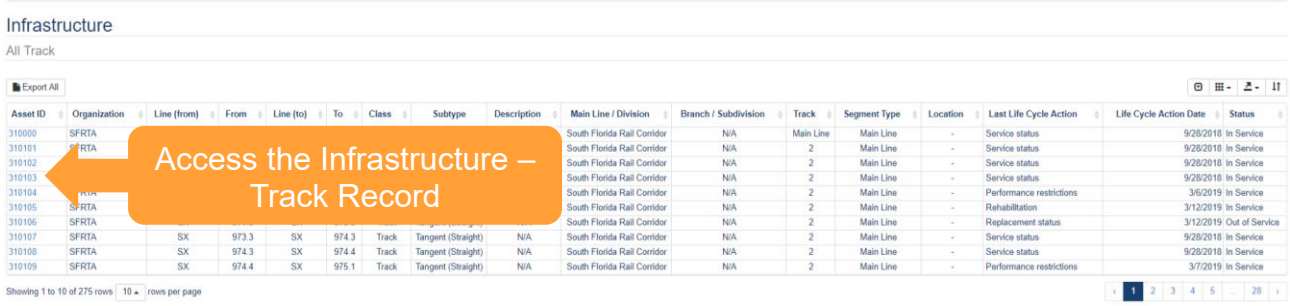
Performance Restrictions can be reported within an individual Infrastructure – Track asset profile, which can be accessed from the Asset Inventory dropdown

**Figure 59 Asset Inventory Dropdown : Infrastructure - Track**



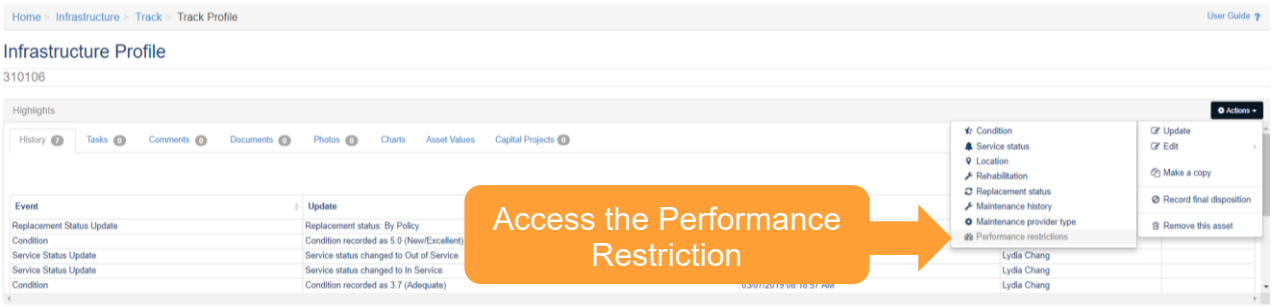

Clicking on the Asset ID text within the row of an asset record, will provide detailed information about that specific asset.

**Figure 60 Existing Asset Interface : Infrastructure - Track**



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

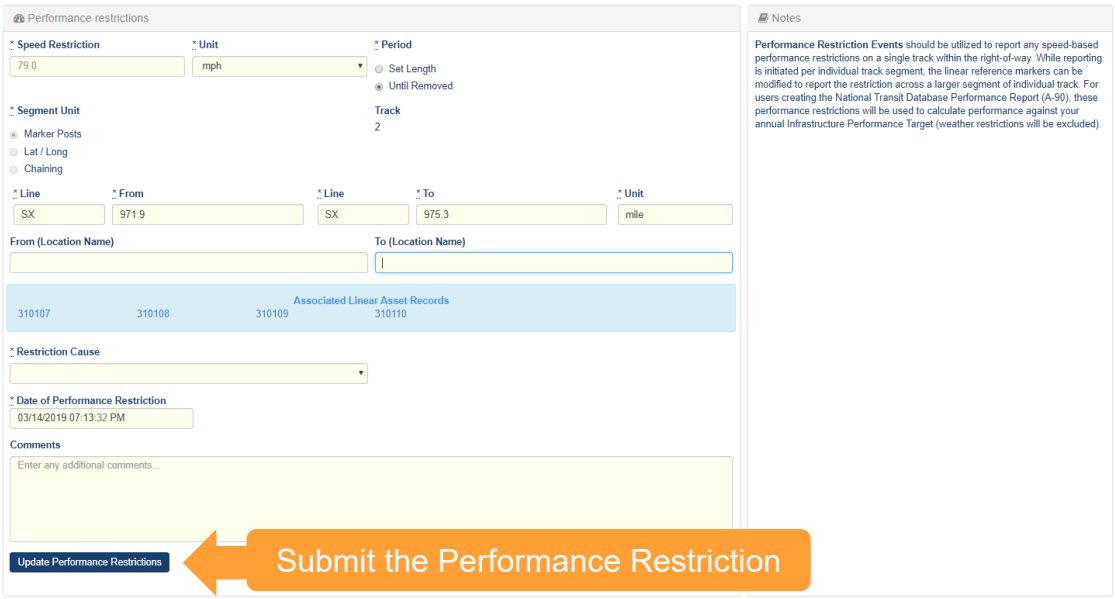
## Figure 61 Lifecycle Action Menu




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.

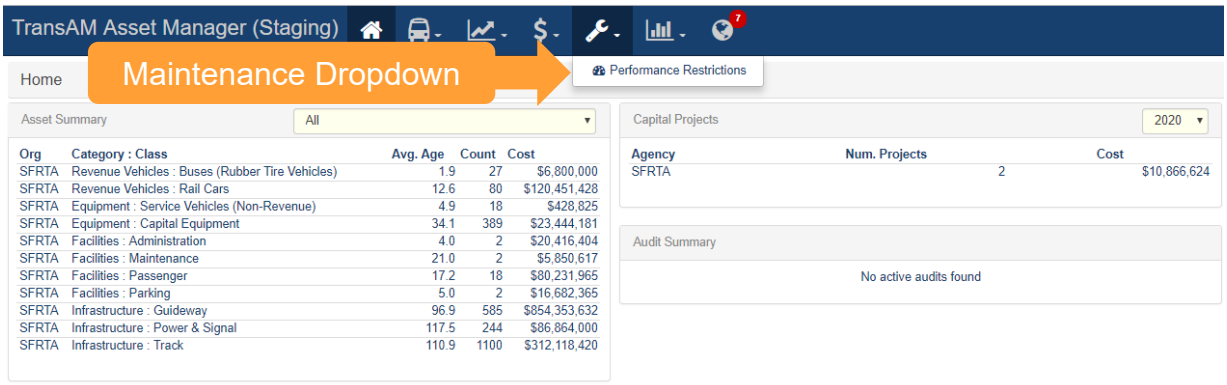
Users can also adjust the linear “From” and “To” marker post values (which were auto-populated from the track record), in order to modify the length of the restriction segment. Modifying the restriction length means the track restriction can be reported for more than one segment of track, even though 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



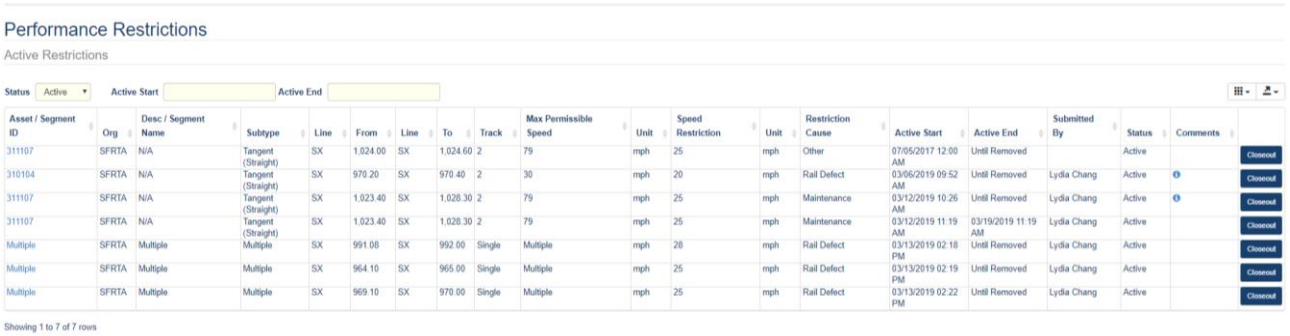
Once a Performance restriction is submitted it appears in the Performance Restrictions section, along with all previously submitted restrictions, and can be managed by accessing the Maintenance Dropdown.

## Figure 63 Maintenance Dropdown




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.

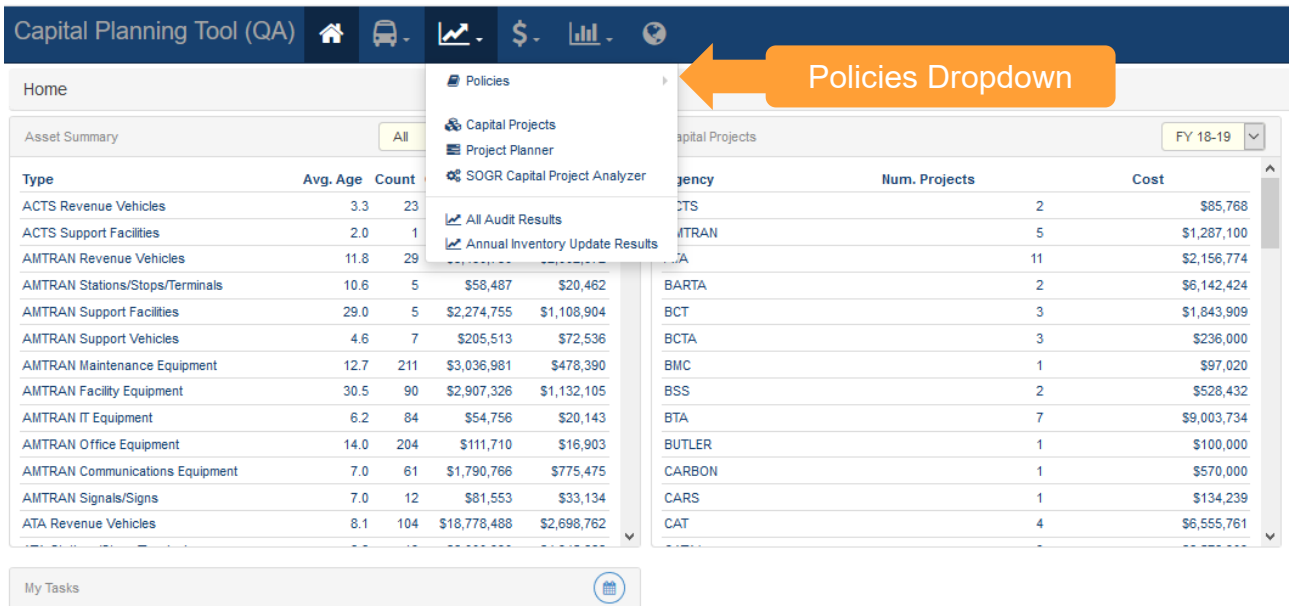
## Figure 64 Performance Restriction Management



# 6.0 Policies

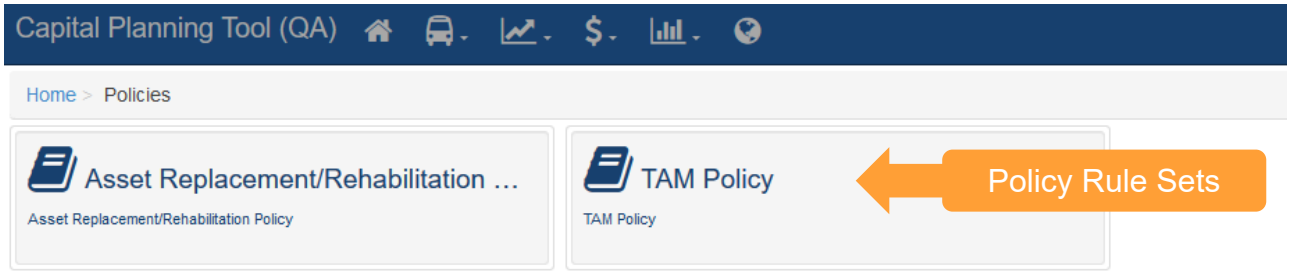
A Policy is a set of parameters that establishes rules related to assets saved within the system. While an organization can create and modify multiple policies, each organization can only have one current policy at a time. The policy is applied to an organization's inventory on an asset by asset basis so that policy rules are reflected on every individual asset.

## Figure 65 Policies Dropdown




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.

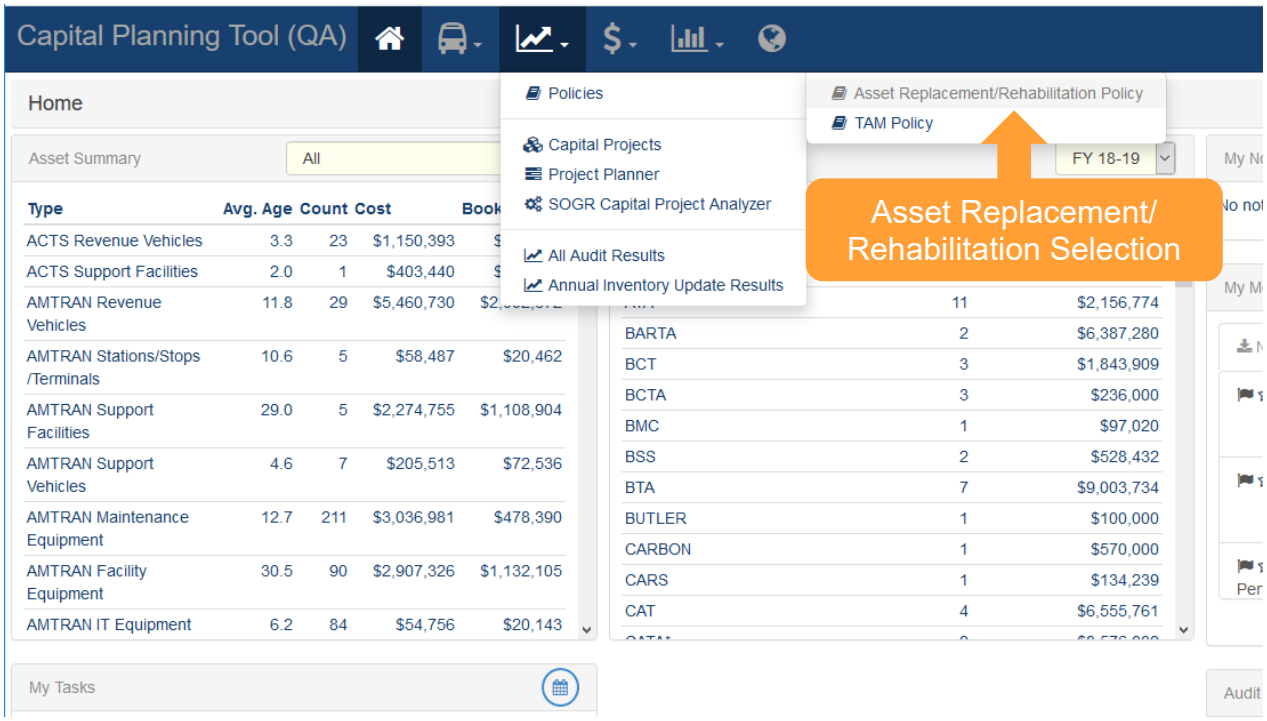
## Figure 66 Policy Rule Sets




## 6.1 Asset Replacement/Rehabilitation Policy

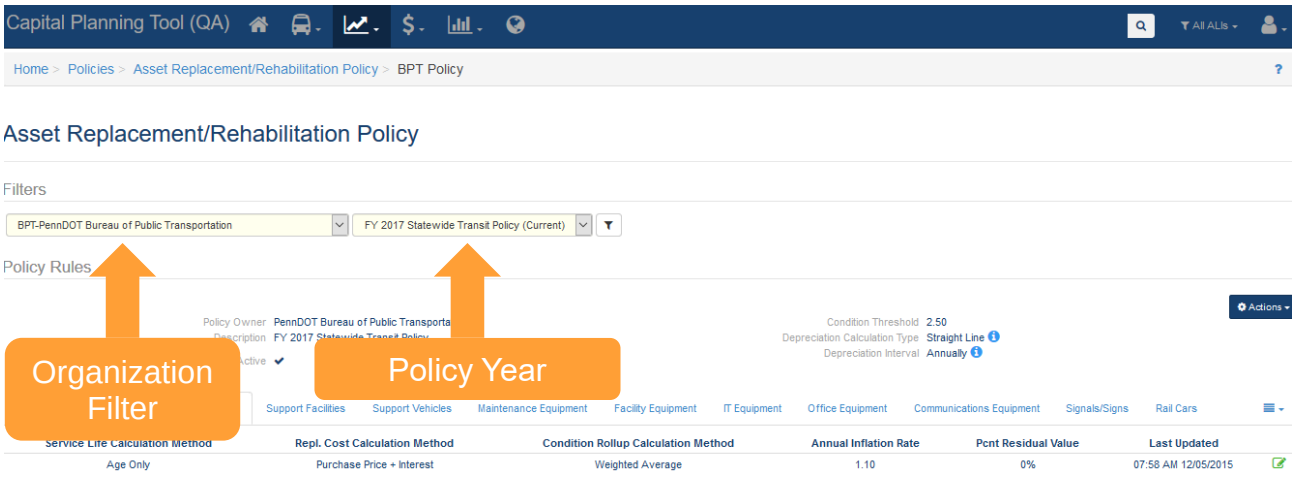
Asset Replacement and Rehabilitation Polices can be chosen under the Policies submenu. The SOGR Capital Project Analyzer, Capital Projects, and Project Planner tools apply this policy to determine the estimated service life, replacement cost, and depreciation of an asset. Asset Replacement/Rehabilitation 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



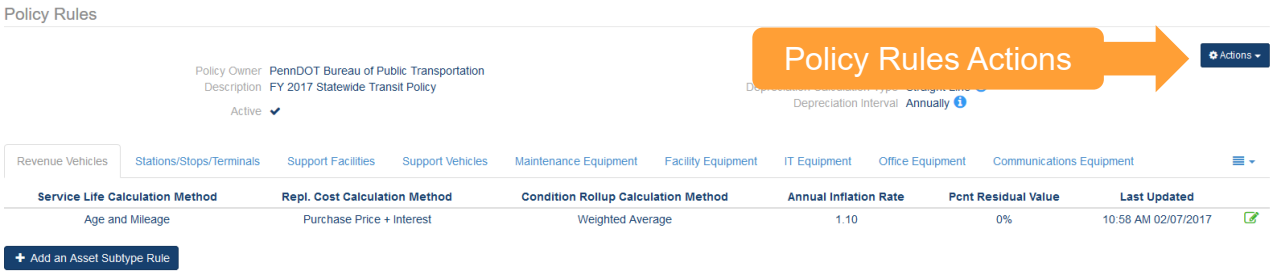

Use the organization filter dropdown to choose the correct organization. You will then need to select the policy year that you wish to work with. Pressing the Filter Button will display the policy rules for the organization and policy year that you have chosen.

## Figure 68 Asset Replacement/Rehabilitation Policy Filters



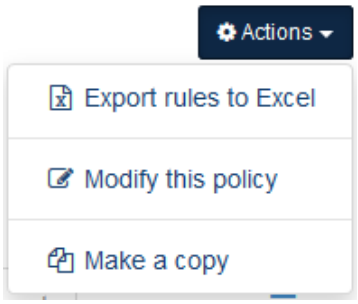

Policy Rules are displayed at one of three levels: organization-wide, asset type, and asset subtype. Organization-wide policy rules can be exported, modified, distributed, copied, and created through the Actions button.

## Figure 69 Policy Rules



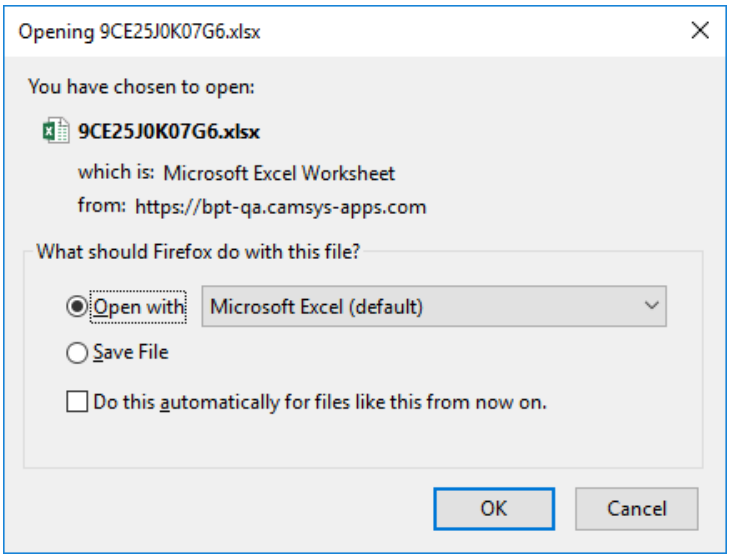

The Actions button will display a list of options as shown.

## Figure 70 Policy Rules Actions Dropdown



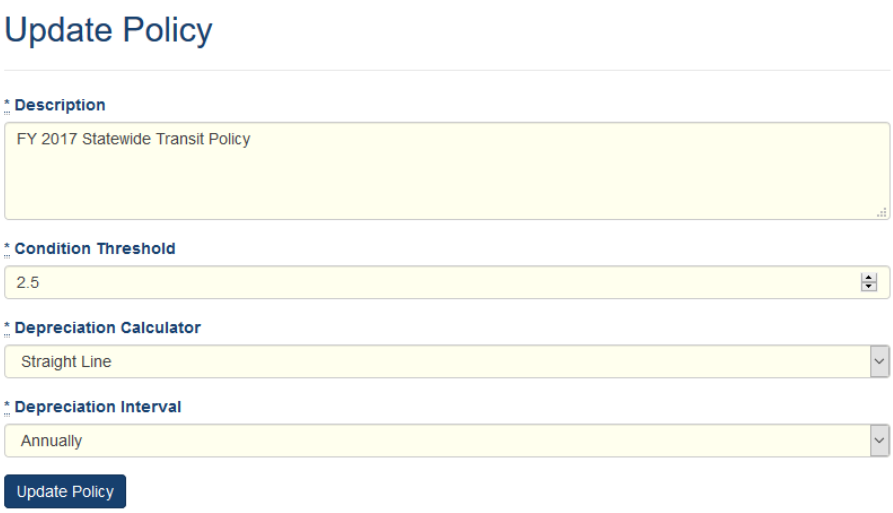

Export rules to Excel opens a dialog box to save the Policy Rule as an Excel spreadsheet file.

## Figure 71 Export rules to Excel (Windows dialog box)



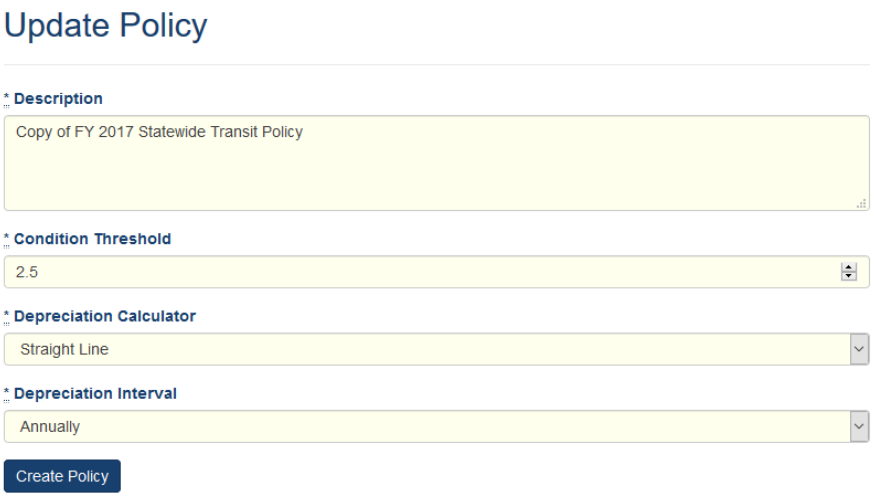

Modify this Policy will open a dialog box that displays the editable fields at the organization level. When you are done making edits, click “Update Policy” button to apply changes.

## Figure 72 Modify (Update) Organization Policy Dialog




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.

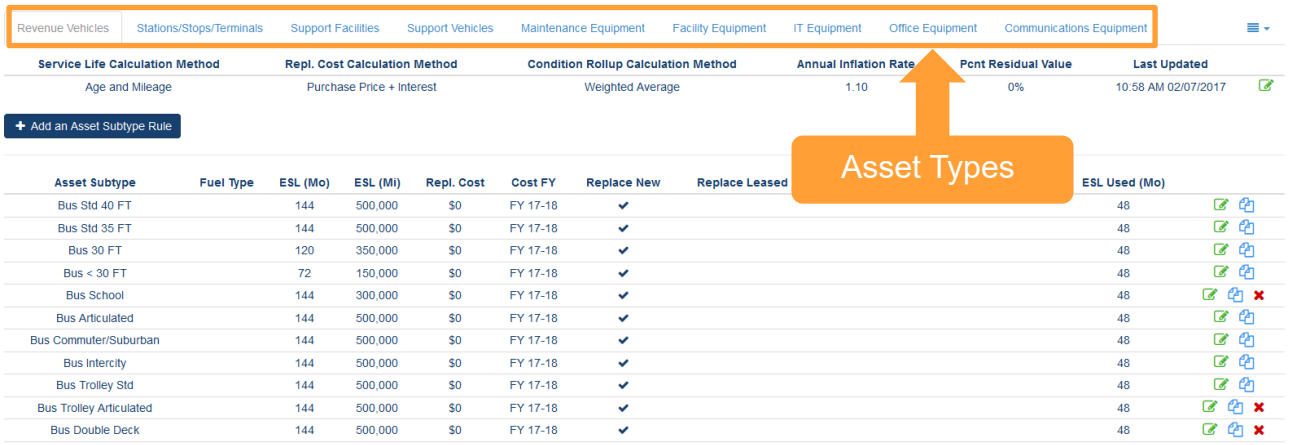
## Figure 73 Copy Organization Policy Dialog




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

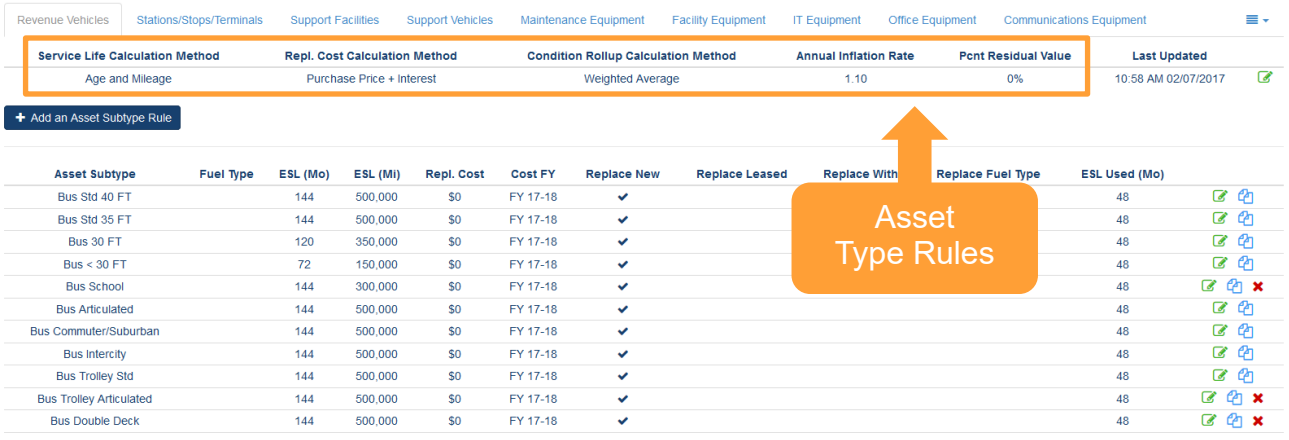



If there are too many asset types to fit in the tabs, you will see the dropdown icon, as depicted below.

## Figure 75 Additional Assets Dropdown Icon

The Asset Type Rules are listed below the Asset Types.

## Figure 76 Asset Type Rules

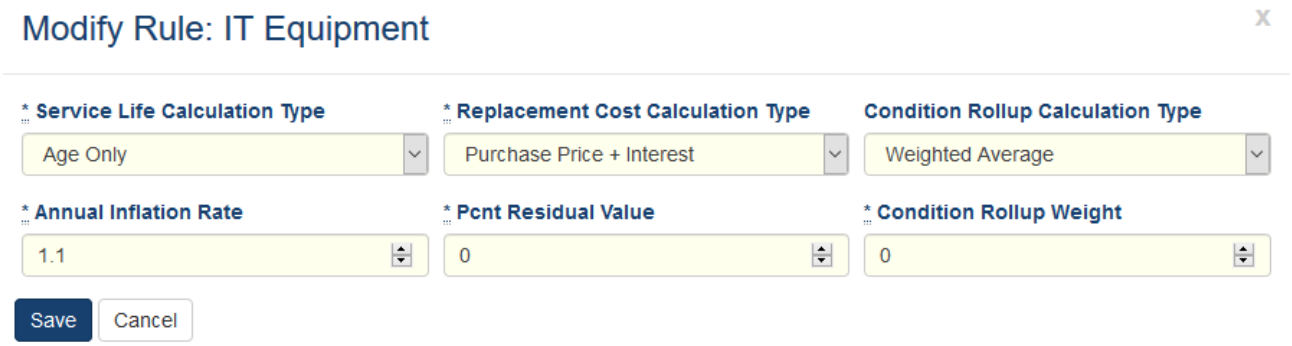



You can edit the Asset Type Rule for a specific asset, by clicking on the edit icon as depicted below.

## Figure 77 Edit Icon

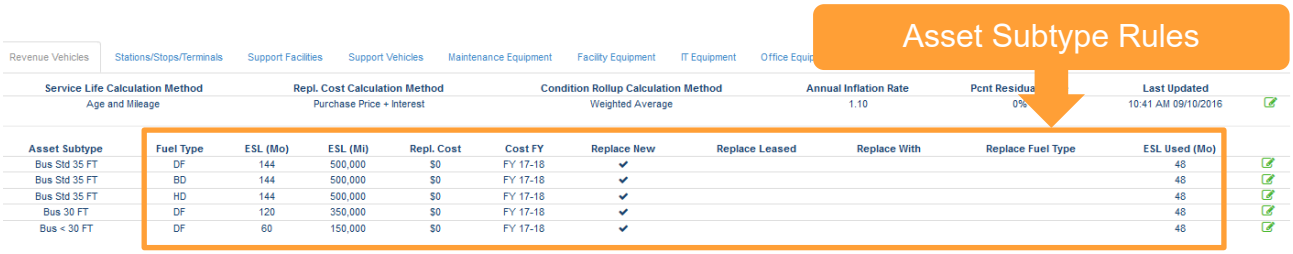
Clicking edit on an “Asset Type Rule” will display a dialog box, allowing you to modify the Asset Policy Rule.

## Figure 78 Modify Asset Policy Rule



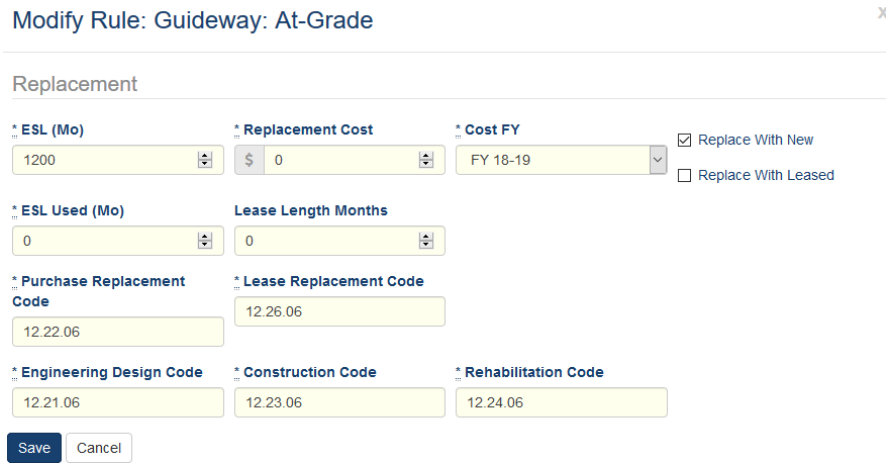

The Asset Subtypes that are displayed will correspond to the Asset Type tab. The available Asset Subtype rules are the same as the Subtypes in your inventory. The estimated service life information at the Asset Subtype level describes the asset and its expected lifespan.

## Figure 79 Asset Type and Asset Subtype rules




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

## Figure 80 Modify Asset Subtype Rule



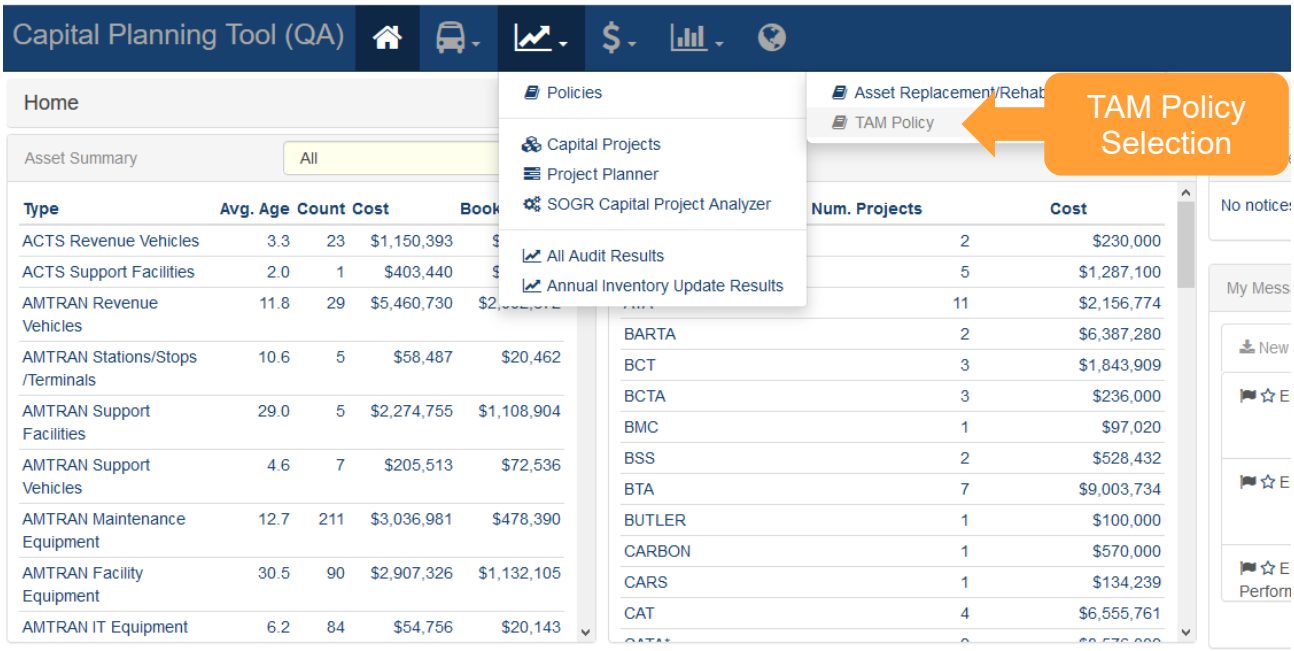

You also can choose to delete an asset subtype rule when the icon is displayed. You will be prompted with a dialog box before this action is taken!

## Figure 81 Remove Asset Subtype Rule

## 6.2 TAM Policy

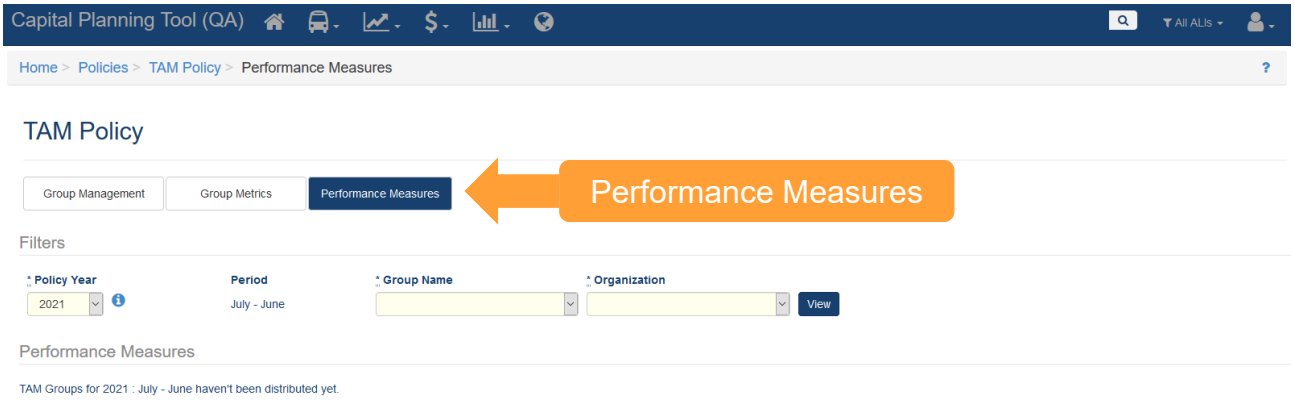
TAM Policies are used to set Useful Life Benchmark (ULB), Transit Economic Requirements Model (TERM), and Performance Measure Percent targets for asset categories on an annual basis. The TAM Policy will be used to conduct performance calculations for the NTD A-90 report. Ideally, TAM Policies should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

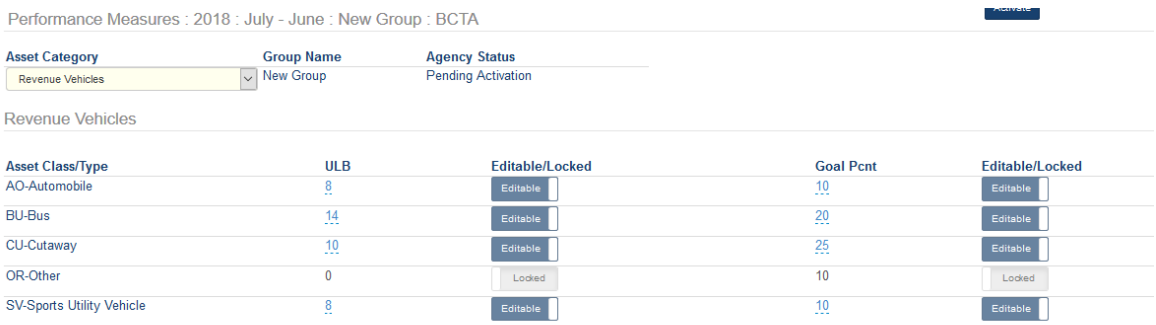



To view an organizations Performance Measures, select the correct Policy Year, Group Name, and Organization and click the “View” button.

## Figure 84 Policy Year Filters

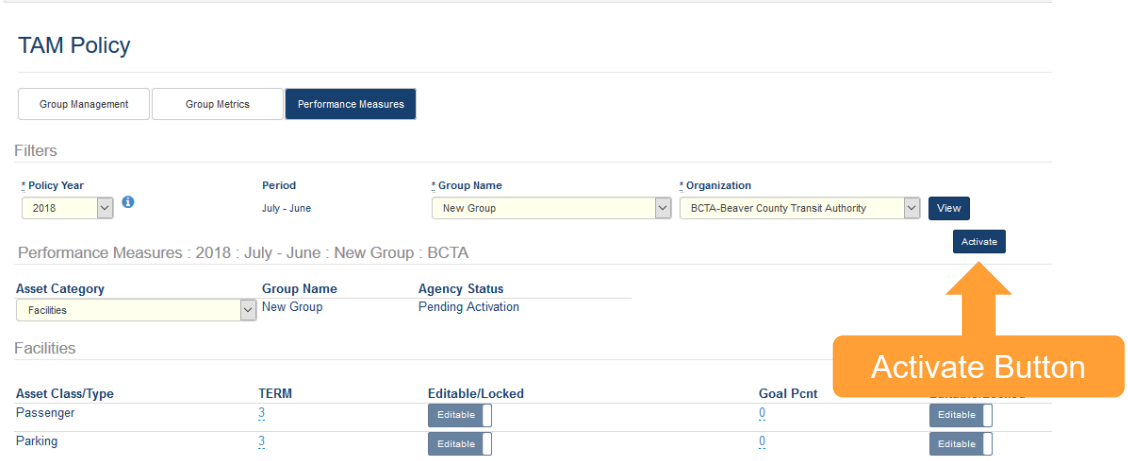
You can select the Asset Category that you wish to view by selecting from the Asset Category dropdown. You can adjust each ULB, TERM value (for Facilities only) or Goal Percent (Goal Pcnt) based on your organization’s need. Any Asset Class/Type that is Locked will not be editable.

## 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 Perfomance Measures



# 7.0 Projects

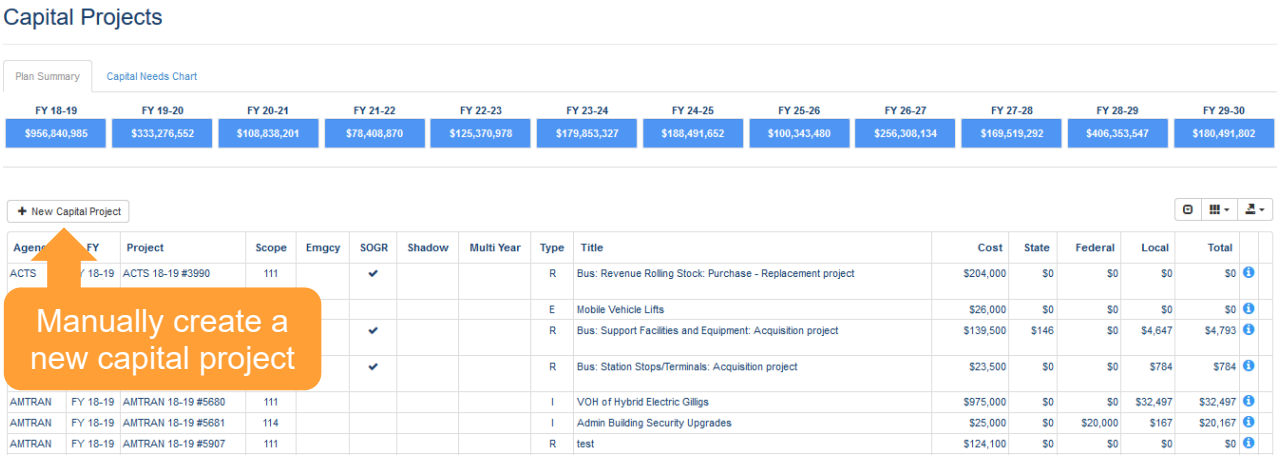
An organization creates a capital project when they want to replace their assets or expand their inventory. Each capital project is composed of one or more building blocks, referred to as Activity Line Items (ALI), and is associated with one or more fiscal years. To frame it differently, ALIs should 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.

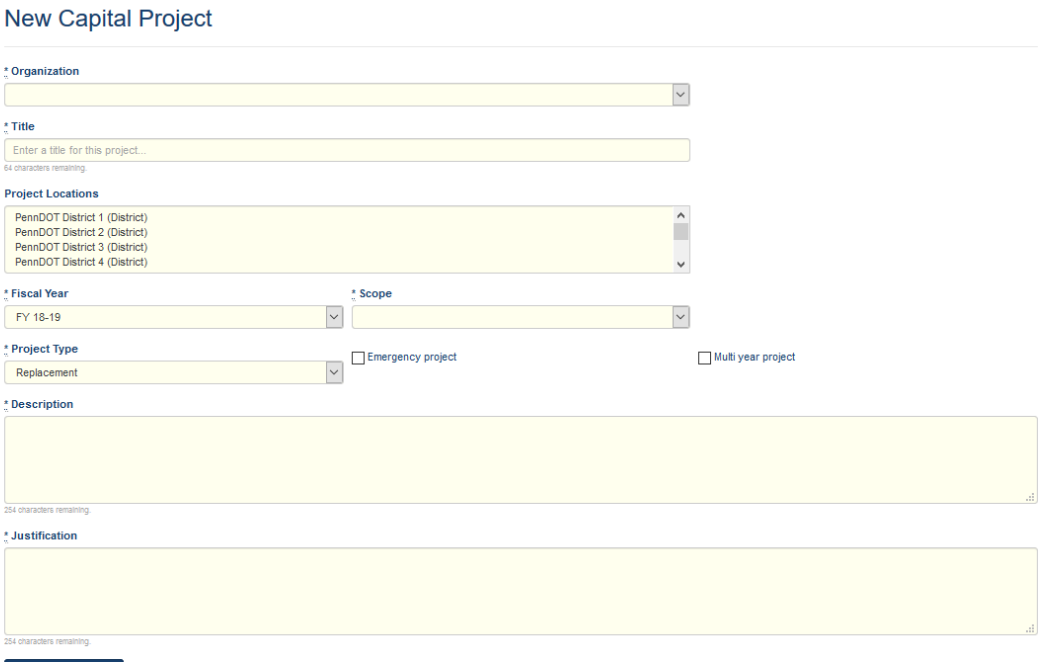
The SOGR projects will automatically be generated by running the State of Good Repair Project Analyzer, which is covered in the project planning section, so we'll quickly review how to create a new capital project manually.

## Figure 87 Capital Projects Table



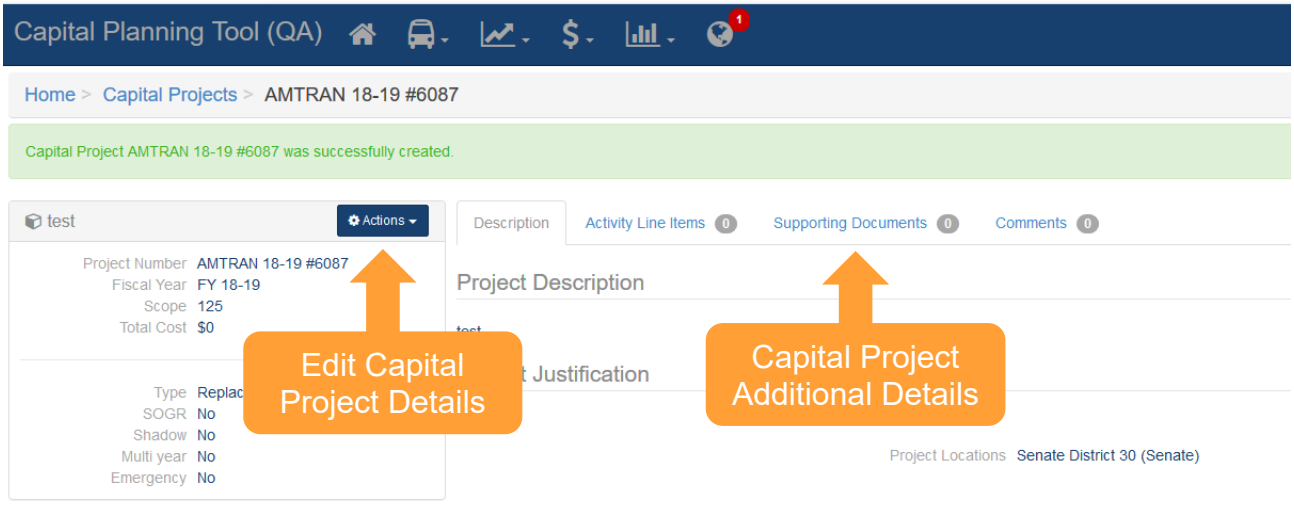

Clicking new capital project will bring you to the new project interface.

## Figure 88 New Capital Project



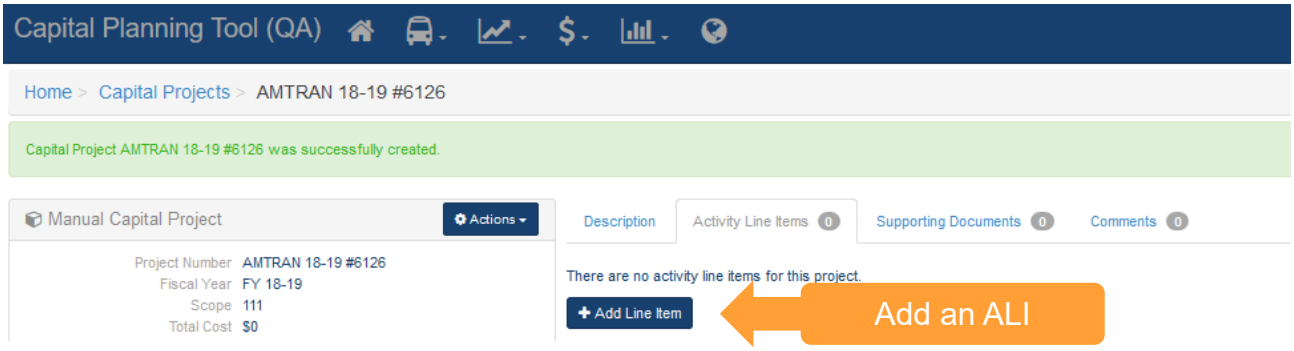

Filling in the required information will bring you to the capital projects detail screen, where you can see detailed information about a capital project and add ALIs and other details.

## Figure 89 Capital Project Details



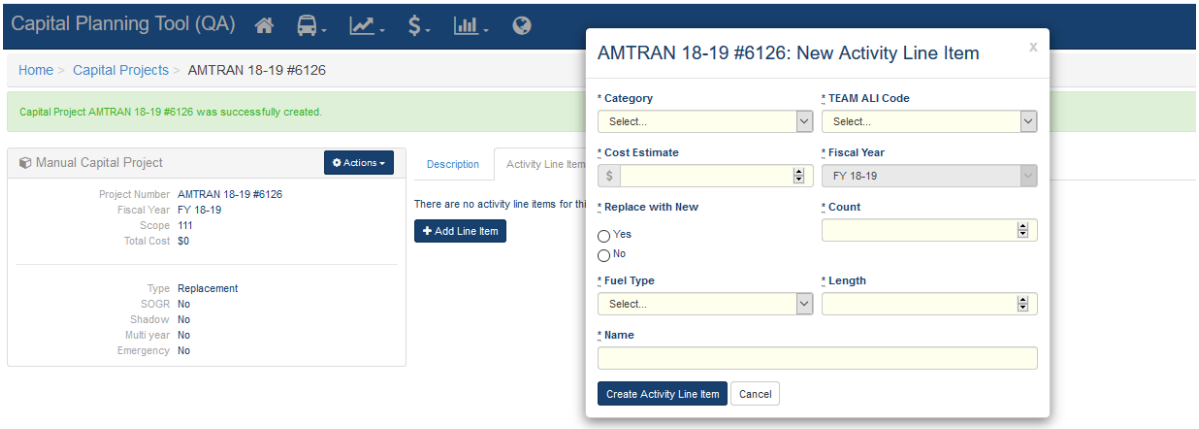

For manually created capital projects, you can add ALIs from the capital project details screen. Click the “Activity Line Items” tab in the additional details, then click the “Add Line Item” button.

## Figure 90 Add an ALI




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

## Figure 91 Add an ALI Details




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

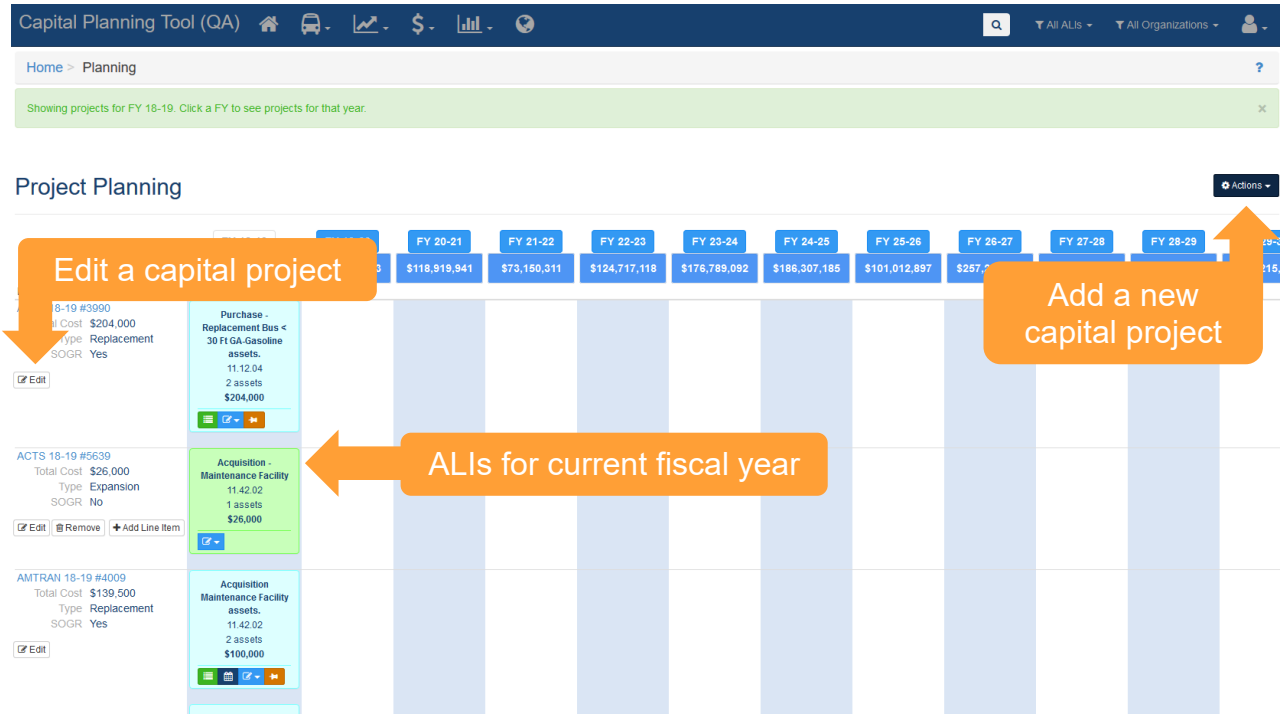
## 8.1 Project Planner

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.

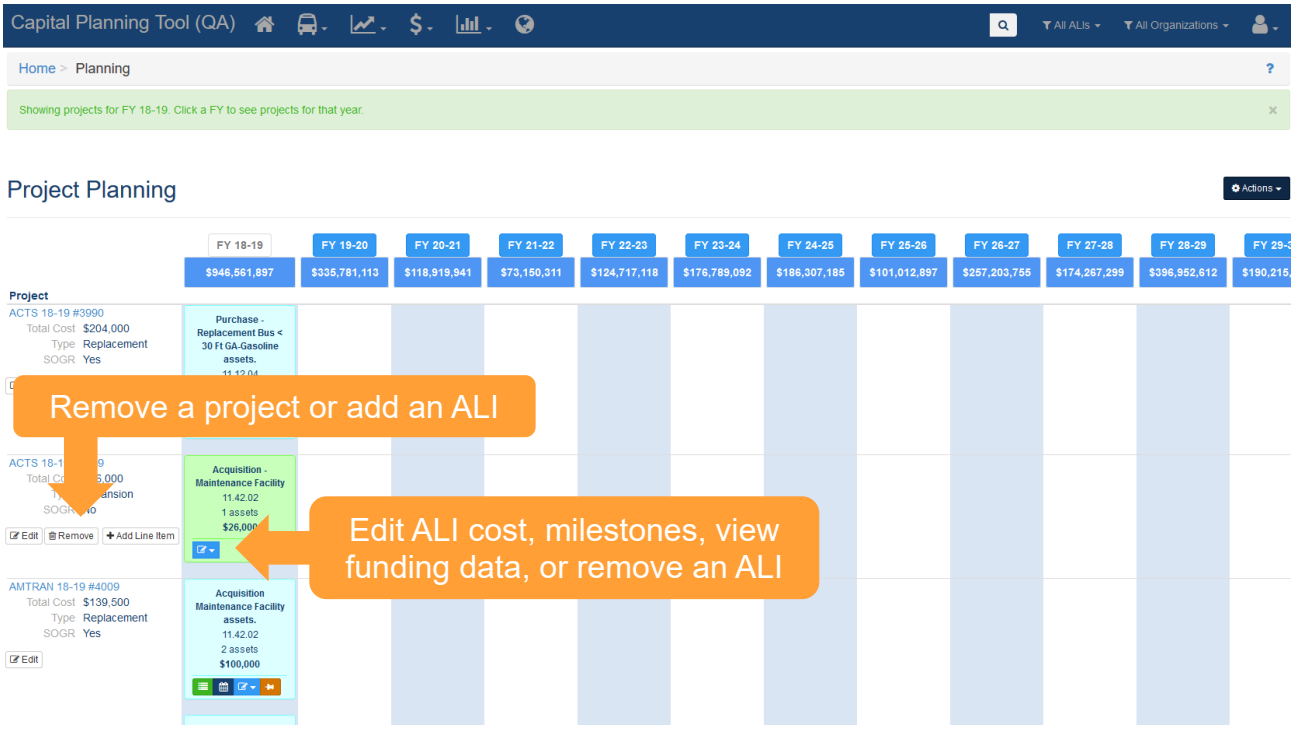
**Figure 92 Project Planner Interface**




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

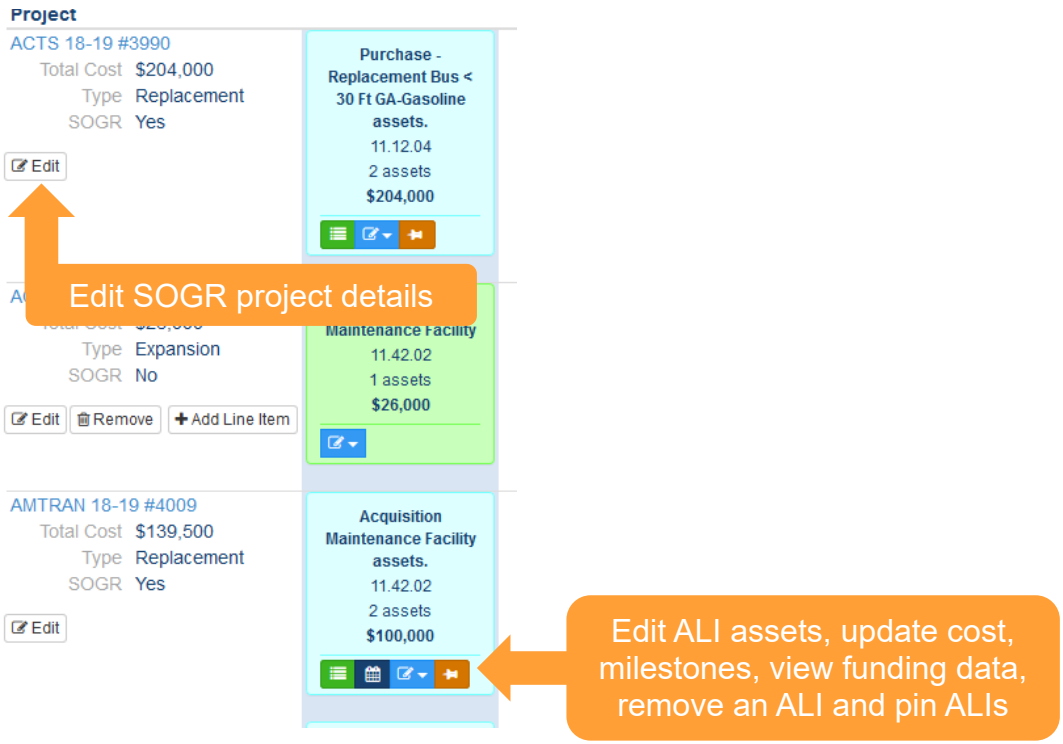
Manually created capital projects can be removed completely and can have additional ALIs added. These actions can be completed by clicking on the “Remove” button or the Add Line Item button on the left-hand side of the planner. ALI details can be viewed or edited by clicking on the icons within each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

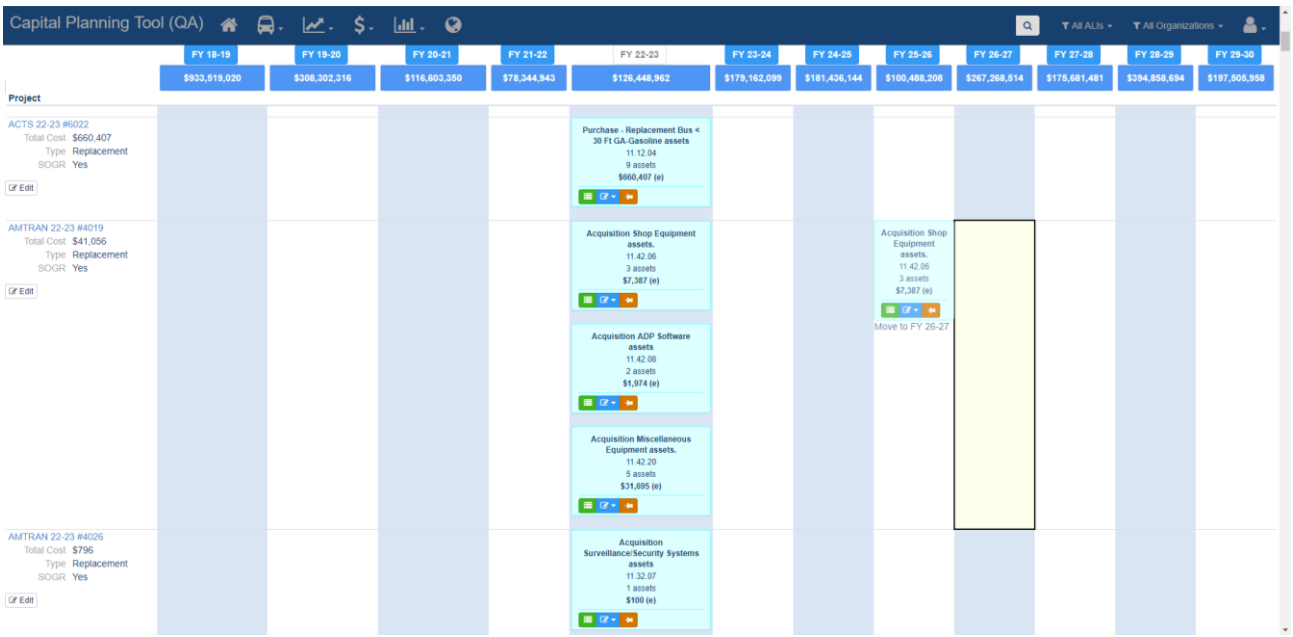
## Figure 94 Edit SOGR Capital Projects




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

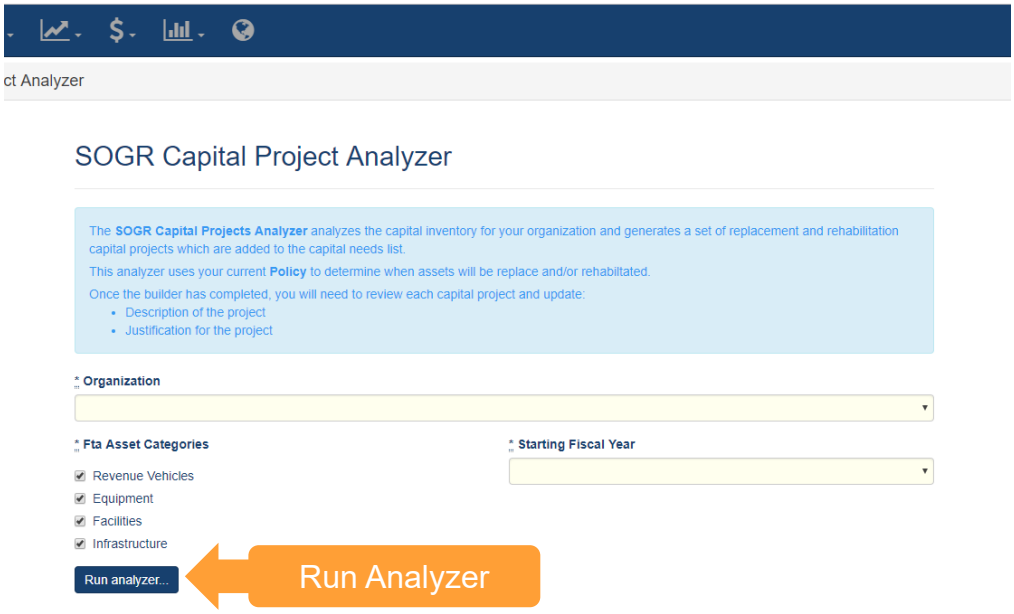
*Move ALIs to Different Years*



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

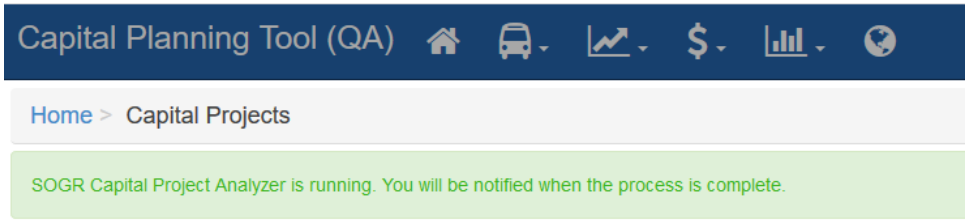
Each organization defines an Asset Replacement and Rehabilitation Policy that indicates the service life and replacement standards to be used for each type of asset. The State of Good Repair (SOGR) Capital Project Analyzer evaluates your organization's asset inventory against this policy and generates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



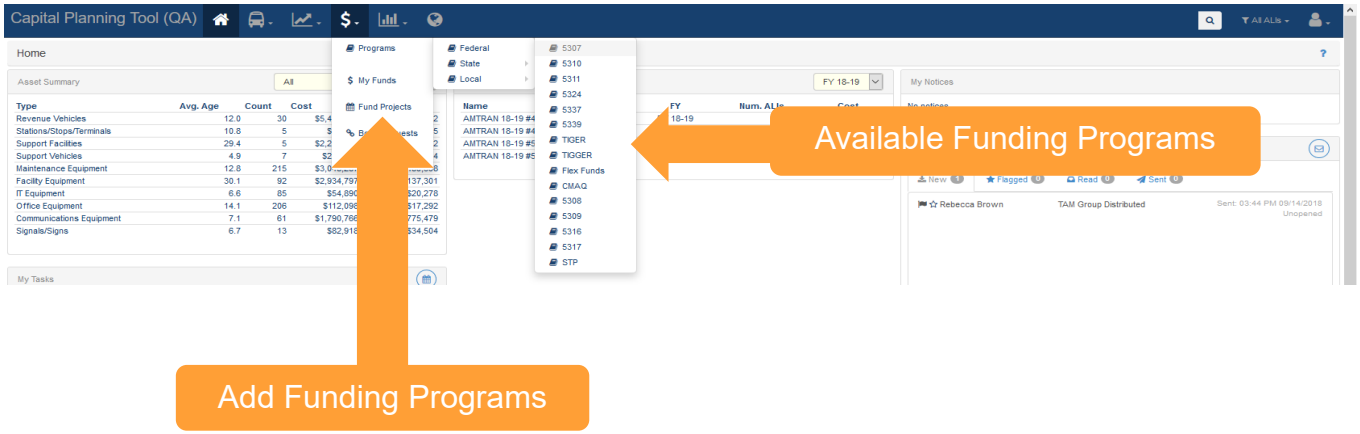
# 9.0 Funding

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

## 9.1 Programs

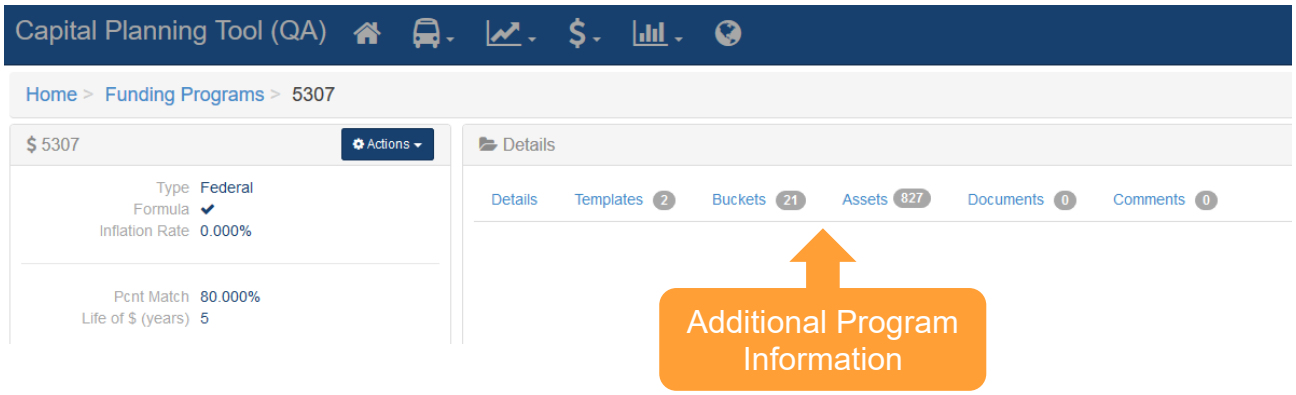
Programs are different types of funding programs which address specific sets of needs and/or objectives. You can see available programs from the Funding dropdown. All funding programs are categorized into an appropriate Source, such as: Federal, State, and Local. New programs can be added by selecting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

**Figure 98 Available Funding Programs**




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

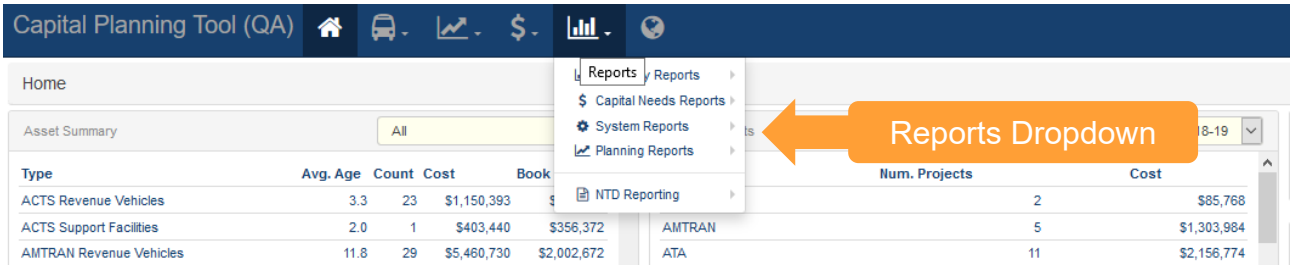
**Figure 99 Funding Program Details**



# 10.0 Reports

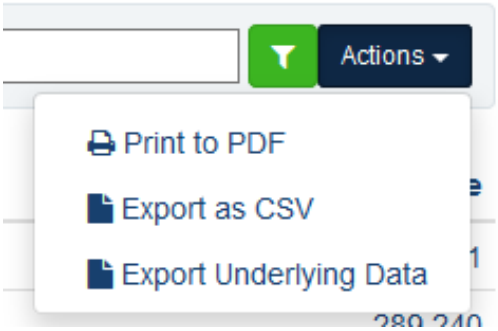
A variety of preconfigured (canned) reports can be generated, ranging in topic areas from Inventory, Capital Needs, System Reports, and Planning.

### Figure 100 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 101 Report Exports

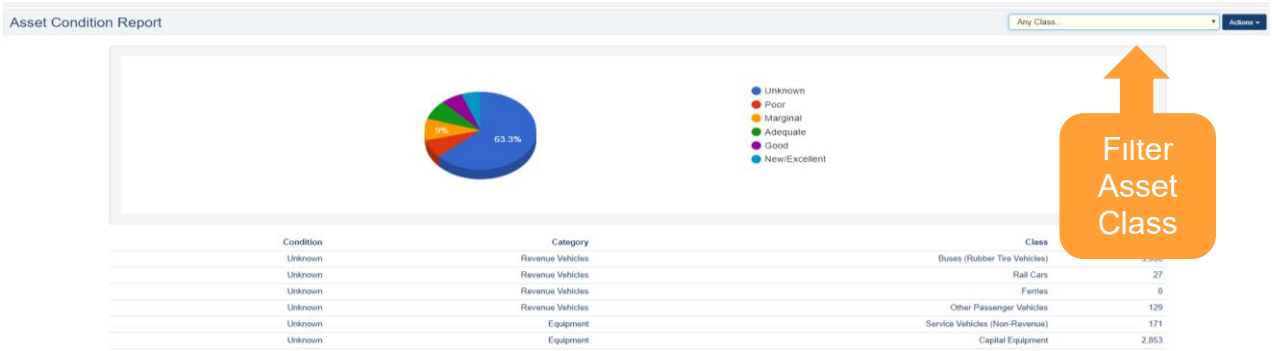



## 10.1 Inventory Reports

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

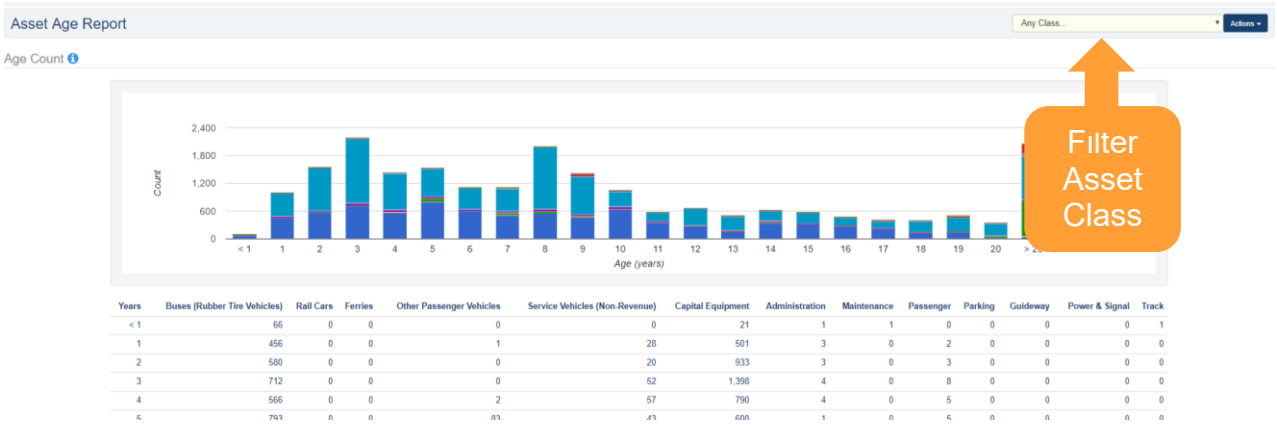
Asset Condition Report—The Asset Condition Report displays the count of assets of different types for a range of asset condition ratings (excellent, good, adequate, etc.). The report can filter data by Asset Class.

### Figure 102 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 103 Asset Age Report




| Years | Buses (Rubber Tire Vehicles) | Rail Cars | Ferries | Other Passenger Vehicles | Service Vehicles (Non-Revenue) | Capital Equipment | Administration | Maintenance | Passenger | Parking | Guideway | Power & Signal | Track |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| < 1 | 66 | 0 | 0 | 0 | 0 | 21 | 1 | 1 | 0 | 0 | 0 | 0 | 1 |
| 1 | 456 | 0 | 0 | 1 | 28 | 501 | 3 | 0 | 2 | 0 | 0 | 0 | 0 |
| 2 | 580 | 0 | 0 | 0 | 20 | 933 | 3 | 0 | 3 | 0 | 0 | 0 | 0 |
| 3 | 712 | 0 | 0 | 0 | 52 | 1,398 | 4 | 0 | 8 | 0 | 0 | 0 | 0 |
| 4 | 566 | 0 | 0 | 2 | 57 | 790 | 4 | 0 | 5 | 0 | 0 | 0 | 0 |
| 5 | 793 | 0 | 0 | 83 | 43 | 600 | 1 | 0 | 5 | 0 | 0 | 0 | 0 |

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.

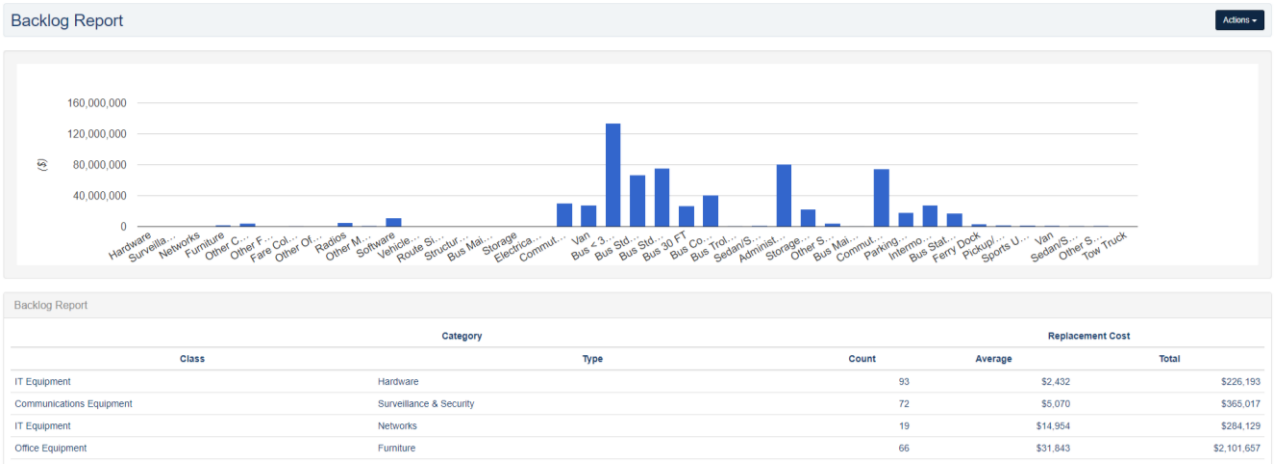
## Figure 104 Asset Funding Source Report

## 10.2 Capital Needs Reports

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

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

### Figure 105 Backlog Report

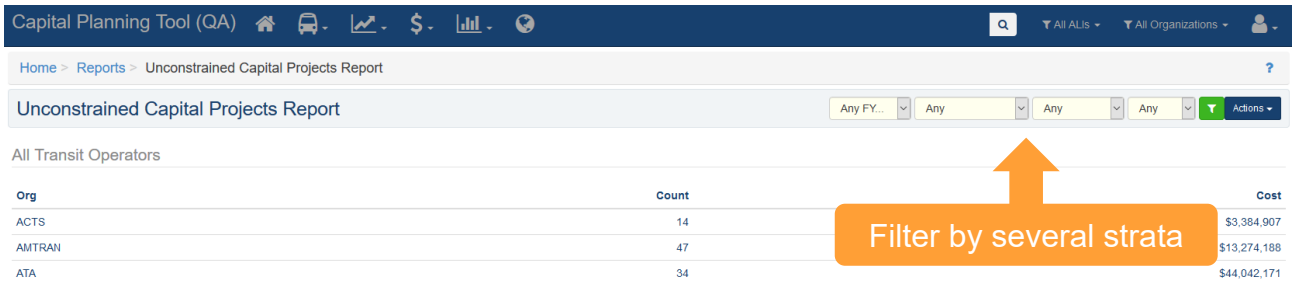



Backlog Report

| | Category | | | Replacement Cost | |
|---|---|---|---|---|---|
| Class | Type | Count | Average | Total |
| IT Equipment | Hardware | 93 | $2,432 | $226,193 |
| Communications Equipment | Surveillance & Security | 72 | $5,070 | $365,017 |
| IT Equipment | Networks | 19 | $14,954 | $284,129 |
| Office Equipment | Furniture | 66 | $31,843 | $2,101,657 |

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 106 Unconstrained Capital Projects Report

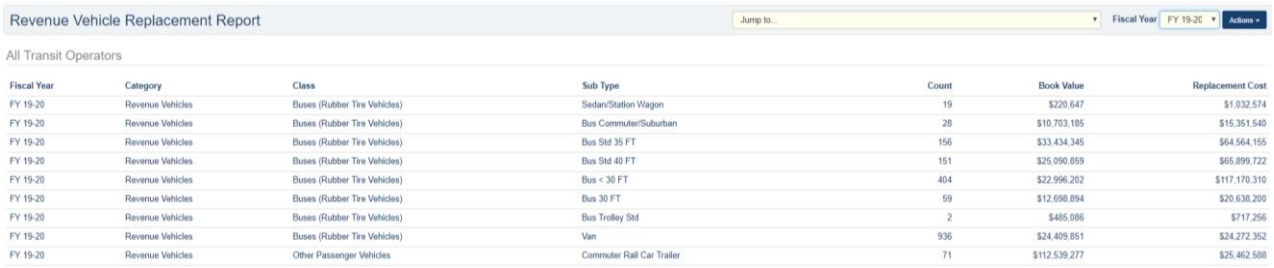



## 10.3 Planning Reports

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 107 Revenue Vehicle Replacement Report



Revenue Vehicle Replacement Report

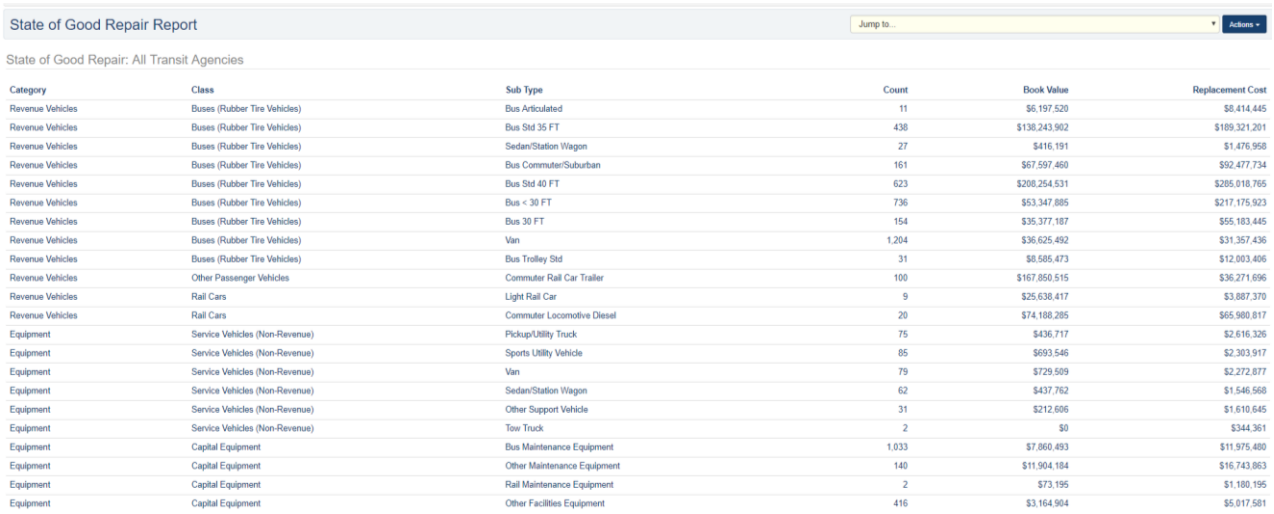
Jump to... Fiscal Year FY 19-20 Actions

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 | $486,086 | $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 108 State of Good Repair Report



State of Good Repair Report

Jump to... Actions

State of Good Repair: All Transit Agencies

| Category | Class | Sub Type | Count | Book Value | Replacement Cost |
|---|---|---|---|---|---|
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Articulated | 11 | $6,197,520 | $8,414,445 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 35 FT | 438 | $138,243,902 | $189,321,201 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Sedan/Station Wagon | 27 | $416,191 | $1,476,958 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Commuter/Suburban | 161 | $67,597,460 | $92,477,734 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Std 40 FT | 623 | $208,254,531 | $285,018,765 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus < 30 FT | 736 | $53,347,885 | $217,175,923 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus 30 FT | 154 | $35,377,187 | $55,183,445 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Van | 1,204 | $36,625,492 | $31,357,436 |
| Revenue Vehicles | Buses (Rubber Tire Vehicles) | Bus Trolley Std | 31 | $8,585,473 | $12,003,406 |
| Revenue Vehicles | Other Passenger Vehicles | Commuter Rail Car Trailer | 100 | $167,850,515 | $36,271,696 |
| Revenue Vehicles | Rail Cars | Light Rail Car | 9 | $25,638,417 | $3,887,370 |
| Revenue Vehicles | Rail Cars | Commuter Locomotive Diesel | 20 | $74,188,285 | $65,980,817 |
| Equipment | Service Vehicles (Non-Revenue) | Pickup/Utility Truck | 75 | $436,717 | $2,616,326 |
| Equipment | Service Vehicles (Non-Revenue) | Sports Utility Vehicle | 85 | $693,546 | $2,303,917 |
| Equipment | Service Vehicles (Non-Revenue) | Van | 79 | $729,509 | $2,272,877 |
| Equipment | Service Vehicles (Non-Revenue) | Sedan/Station Wagon | 62 | $437,762 | $1,546,568 |
| Equipment | Service Vehicles (Non-Revenue) | Other Support Vehicle | 31 | $212,606 | $1,610,645 |
| Equipment | Service Vehicles (Non-Revenue) | Tow Truck | 2 | $0 | $344,361 |
| Equipment | Capital Equipment | Bus Maintenance Equipment | 1,033 | $7,860,493 | $11,975,480 |
| 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 109 Disposition Report

Disposition Report

Jump to... Fiscal Year FY 18-19 Actions

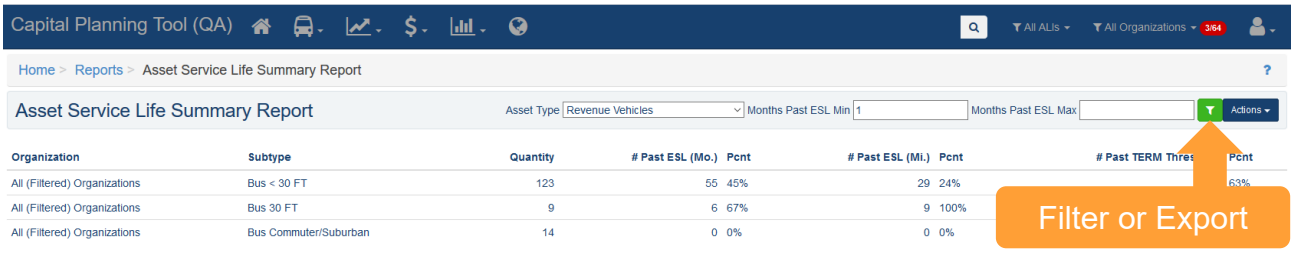
All Transit Operators

| 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 110 Asset Service Life Summary Report

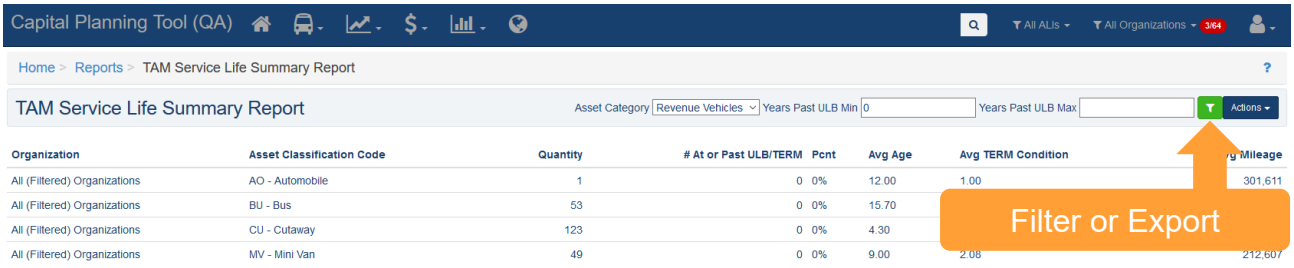



The TAM Service Life Summary Report displays all asset categories, listed by subtype, and calculates the following:

- 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 111 TAM Service Life Summary Report



# 11.0 Specialized Reports

## 11.1 Asset Fleet Builder

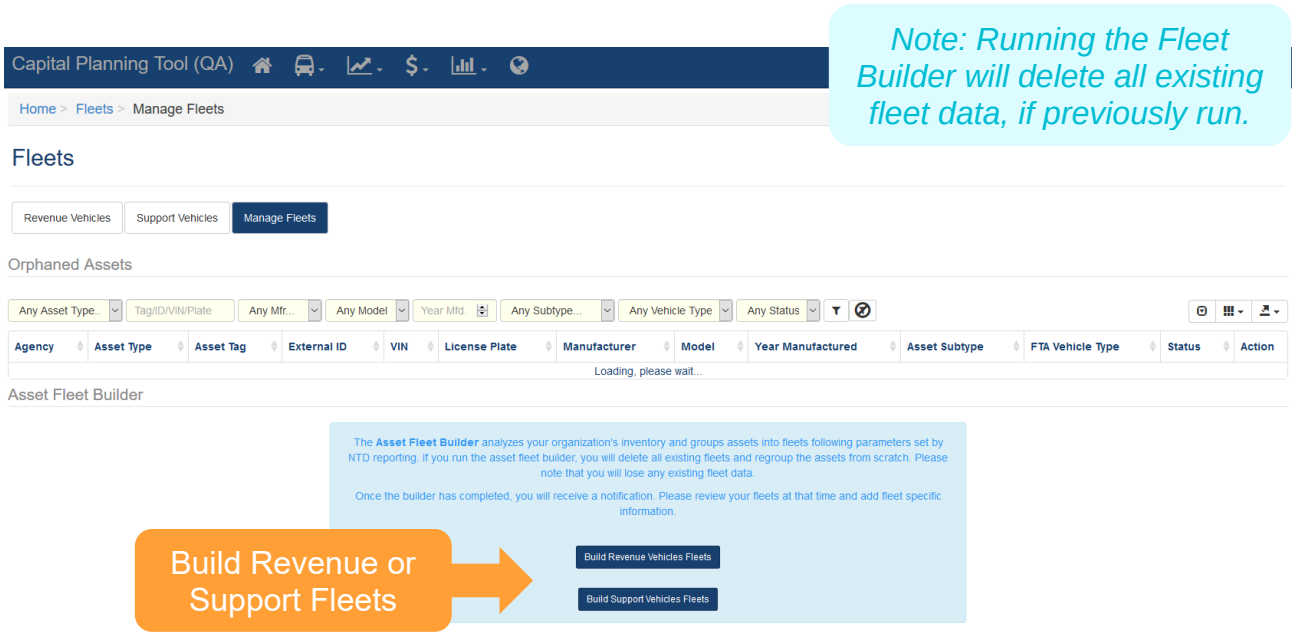
A fleet is a number of vehicles that share the same characteristics. Organizing vehicles into fleets is advantageous because it summarizes rolling stock inventories at a higher level.

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

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

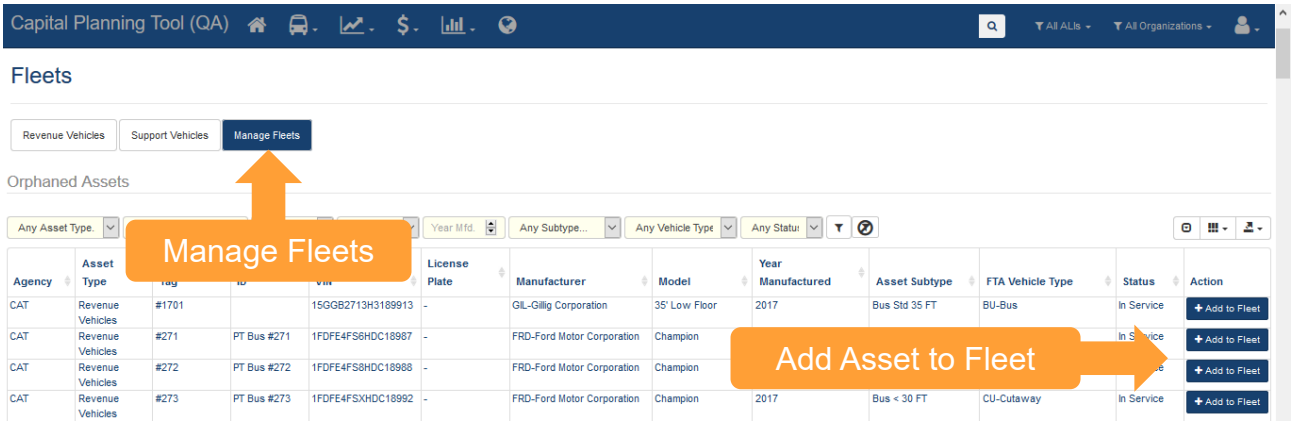
**You should only use the builder tool the first time you create a fleet, otherwise you will delete existing fleets.**

### Figure 112 Asset Fleet Builder



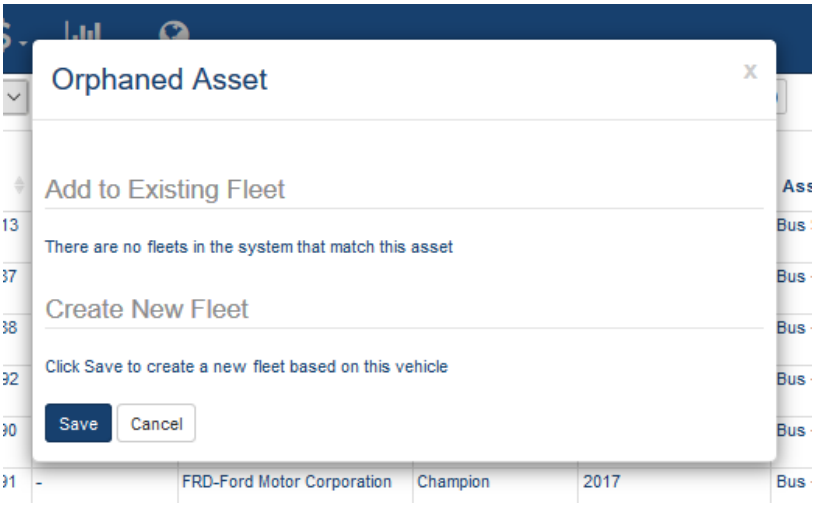

When you add a new asset to the system, the new asset will be added as an Orphaned Asset within the Manage Fleets section.

## Figure 113 Asset Fleet Builder—Orphaned Assets



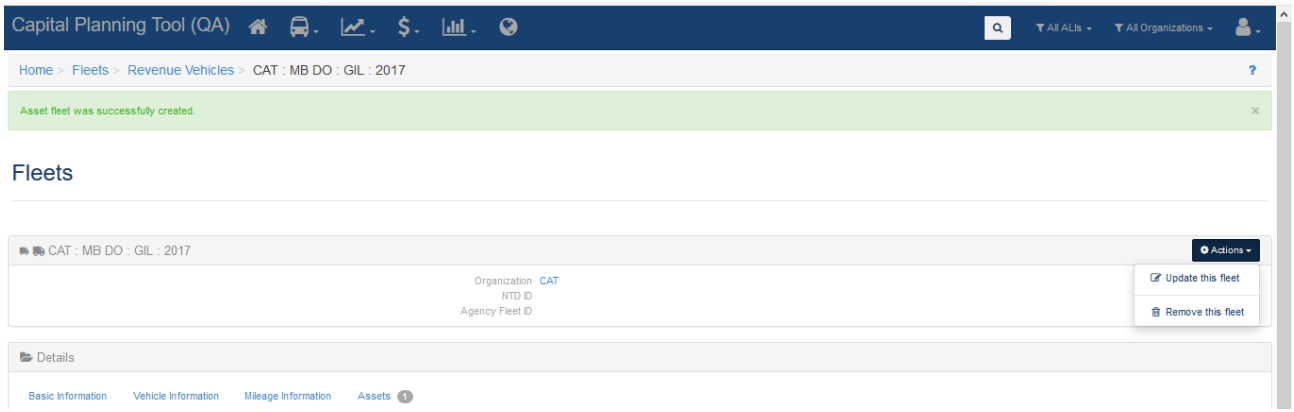

Selecting “Add to Fleet” on the right allows users to add assets to a current fleet or create a new fleet, and will limit options of existing fleets only if all shared characteristics match. Clicking “Save” will either add to an existing fleet, or create a new fleet, depending on what you choose, and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

## Figure 114 Adding an Orphaned Asset to a Fleet

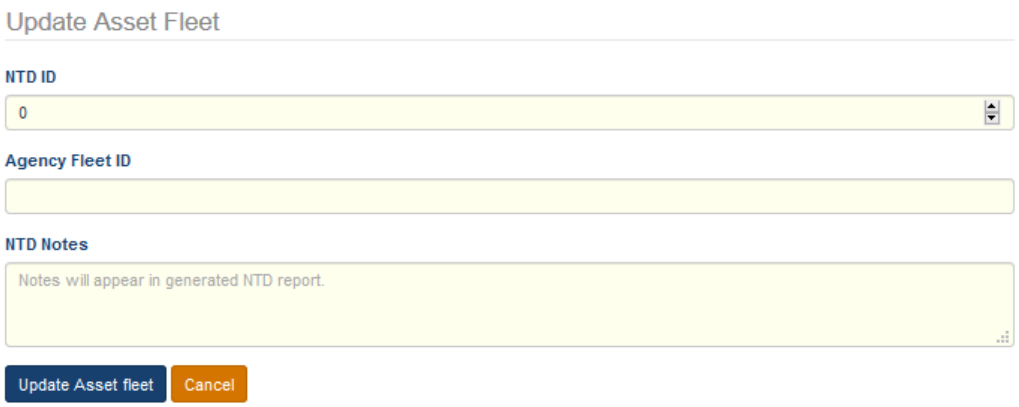



When you add the asset to a new fleet, if you wish to update fleet-specific details, look for the actions button, and click “Update this Fleet” to add details. Users also can remove the fleet completely, at which point all fleet assets will return to the Orphaned Assets portion of the Manage Fleets section.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

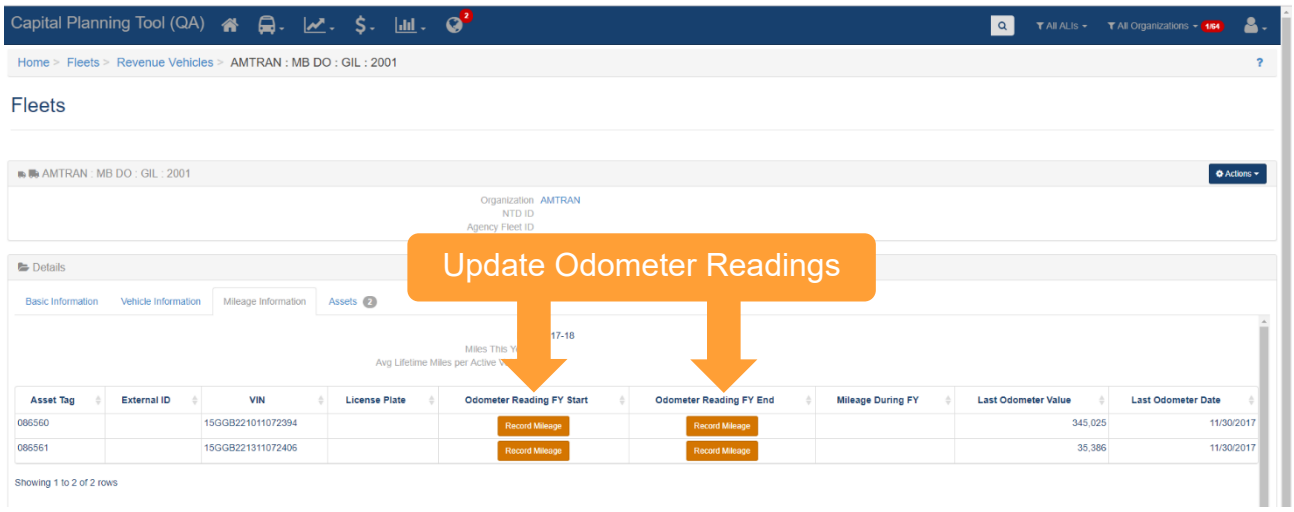
## Figure 115 Adding a New Fleet



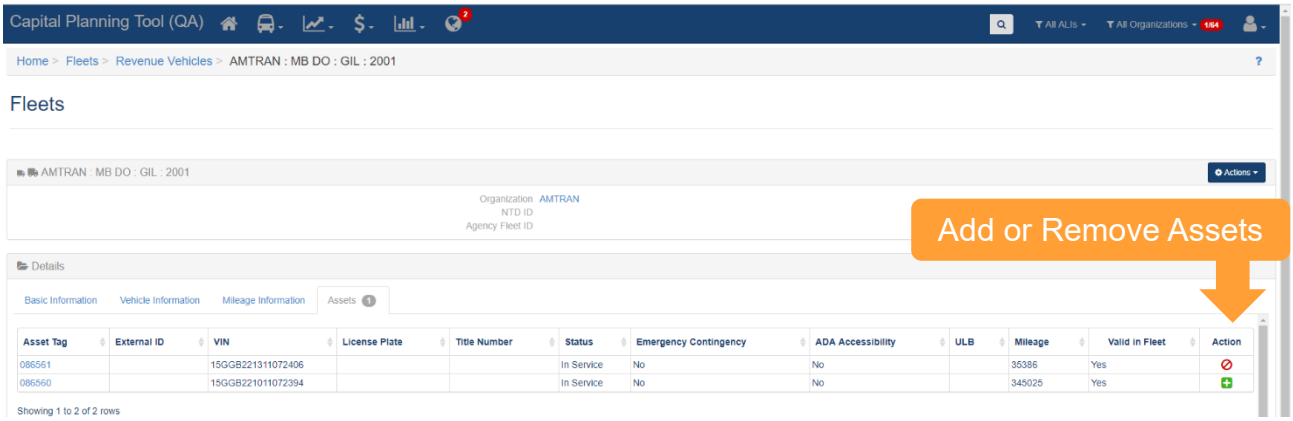

## Figure 116 Update Asset Fleet Details




## Figure 117 Update Odometer Readings



## Figure 118 Remove or Add Assets from within a Fleet




## 11.2 NTD Asset Reports

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

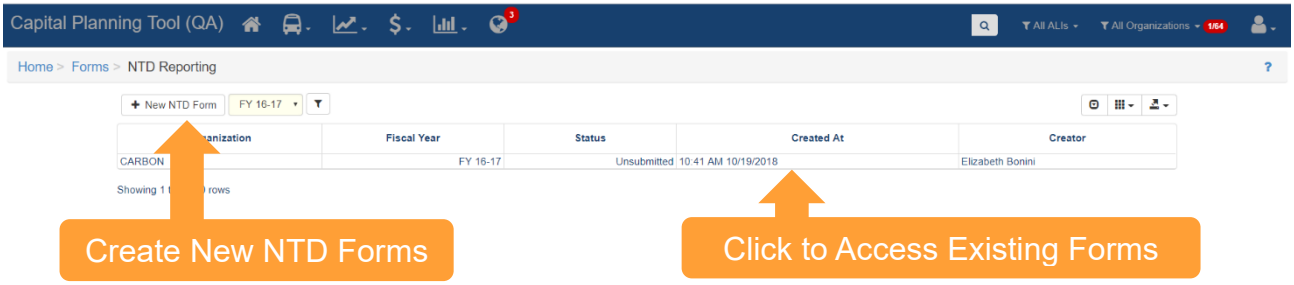
- Facilities (A-15) — Pulls asset data for primary facilities.
- Infrastructure (A-20) — Pulls asset data for infrastructure assets, and produces a separate report for each Primary Mode/Type of Service unique combination.
- Revenue Vehicles (A-30) — Pulls asset data for revenue vehicles, which are included 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 119 Access NTD Reports

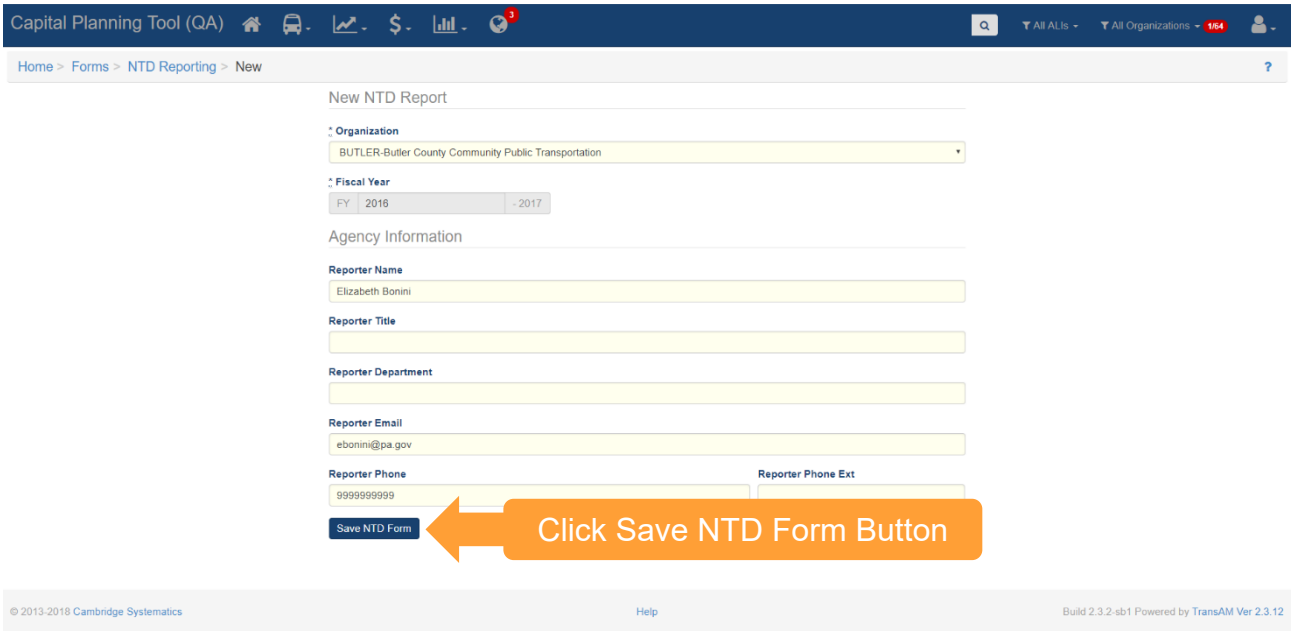
Any NTD reports that have been previously generated can be viewed on the initial report table available when clicking on the NTD Reports module. Existing report data can be accessed by clicking on the row for an individual organization upon which point it can be downloaded, submitted for review, have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

## Figure 120 Table of Previously Generated NTD Reports

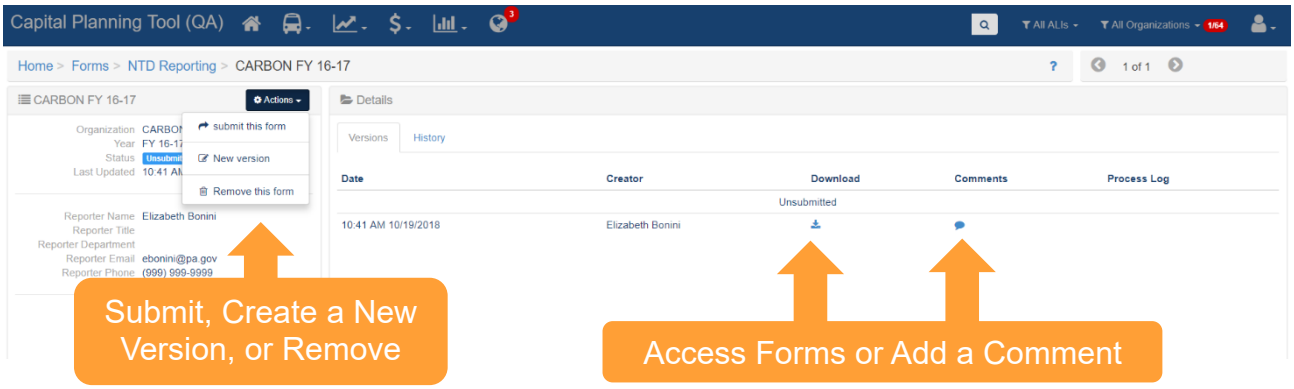


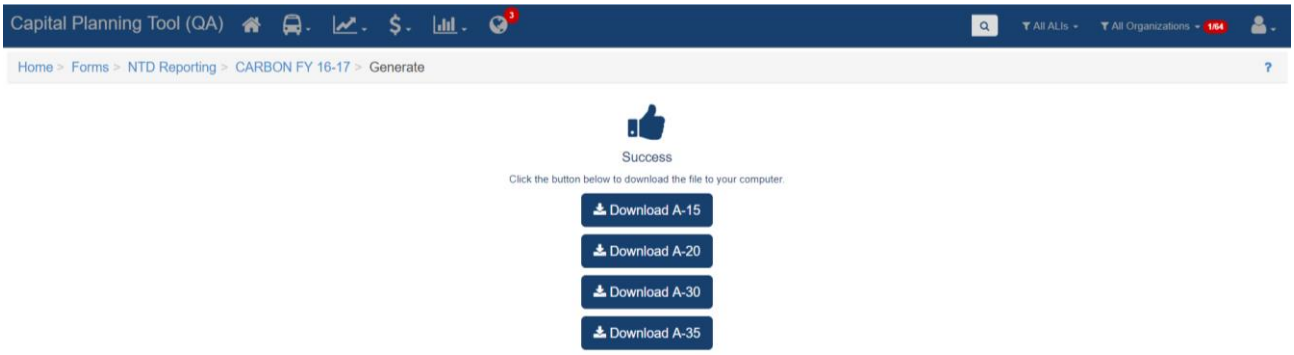

When you click on the “New NTD Form” button, you will be prompted to select an organization, reporting year, and enter other user-specific information. Upon clicking “Save NTD Form”, you will be directed to the newly created NTD Details and Data page.

## Figure 121 Create New Reporting Year Forms




## Figure 122 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 123 Download each NTD Form