

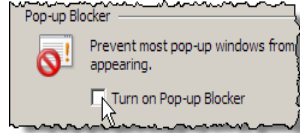
Task Overview:

- Get Started
- Sign In
- Edit Your Account Profile
- Create a Custom TA List

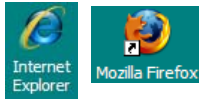
- Search/Sort
- Sign Out
- Download Acrobat Reader
- Get Help with PTMS

Instructions

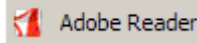
1. **Get Started:** Disable all pop-up blocker software before using PTMS.



2. Internet Explorer version 6.x or higher is recommended for PTMS. Recent versions of Mozilla Firefox should also work.



3. To use the TA forms portion of the PTMS, Adobe Reader software (a free download from the Internet) is required. (See instructions later in this document.)



4. Please save frequently. Thirty minutes of inactivity will result in automatic log out and loss of any unsaved entries.



5. Internet fluctuations may cause slower PTMS response. Please be patient while waiting for new screens, before re-clicking any buttons.

6. When *editing* information in the system, please do not use the **Back** button. If you are just *viewing* information, the **Back** button may be used.



1. **Sign In:** Open Internet Explorer. Type:
<https://mdotwas1.mdot.state.mi.us/login/userLogin.do>

OR

www.michigan.gov/mdotptms

Hit **Enter**

Tip: Book marking as a Favorite will make future visits even faster and easier.



2. Enter your **User ID** and **Password**.

Note: For locked accounts or forgotten IDs and passwords, contact Kathy Urda. (See contact information on next page.)

3. Then click Sign In.
OR Hit **Enter**



4. Click on **PTMS** in the UARS application selection screen.

Application Name	Description
PTMS	Public Transportation Management System
PaveMaPP	PaveMaPP

5. The PTMS screen opens.



6. Click on the desired transit agency. If the agency you desire is not on your screen, create a new custom list or use the Search/Sort button (explained later) to choose the Statewide list of TAs.



1. **Edit Your Account Profile:** Sign In using the first THREE steps above.



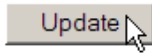
2. Click the **Your Profile** link in the top center of the page.



3. Enter any needed changes.

See Next Page →

4. Scroll to the bottom of the page and click the **Update** button.
UARS informs you of success.



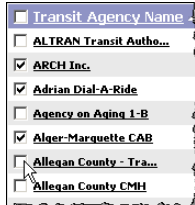
5. Click **Sign Out** to leave **OR** click UARS Home and then click to enter PTMS.



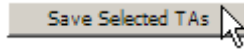
...OR...



1. **Create a Custom TA List:** Sign In to PTMS. Click the checkbox next to each TA you want to include in your list. **OR** click the box in the heading to select ALL.

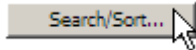


2. Click on the **Save Selected TAs** button at the top of the list.
3. To change your custom list of TAs, use a search (see below) to produce a list of desired agencies, then check their boxes and click **Save Selected TAs** again.

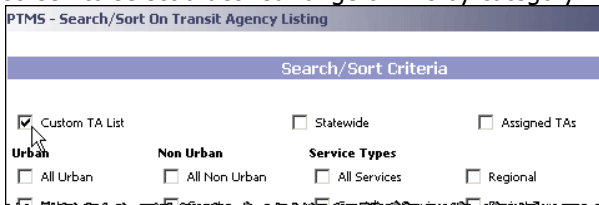


TIP: *New agencies are sometimes added to PTMS. Keep your custom "statewide" lists current by occasionally using search/sort to re-create them.*

1. **Search and Sort:** Click the Search/Sort button at the top of the screen.



2. You can use the checkboxes in the upper half of the screen to select a desired range of TAs by category.

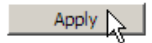


3. **OR** you can use the criteria at the bottom of the page to "home in" on specific TA records within the categories selected above.

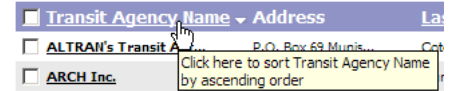
Item	Operator	Value	Sort Order	Sort By
TA	=	-Select Transit Agency-	<input type="checkbox"/>	
Last Name	=		<input type="checkbox"/>	
First Name	=		<input type="checkbox"/>	
Telephone No.	=		<input type="checkbox"/>	

4. At the lower right side you can use the checkboxes to set the fields and order for your sorted list. Use the drop-downs to specify an ascending or descending sequence. (See previous picture.)

5. Click the Apply button at the bottom of the page to see the record(s) determined by your checkbox or criteria selections.



6. **TIP:** Another quick way to sort in ascending or descending order directly in the list screen is by clicking the arrow next to the underlined column heading.

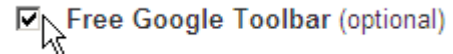


1. **Sign Out:** To protect your data, always sign out from PTMS by clicking the Logout link in the upper right corner.



1. **Download Acrobat Reader:** The Acrobat Reader is available at:
<http://www.adobe.com/products/acrobat/readstep2.html>

2. Clear the checkbox of any unwanted add-ons.



3. Click the Download Now button.



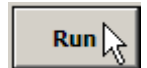
4. Depending on your security settings, you may need to click the yellow bar at the top of Internet Explorer and allow the "ActiveX" installation.



Then in the security dialog box, click Install.



5. If a box asks whether you want to Run or Save, click Run. Wait for the automatic download, installation, and configuration.



Get PTMS Help: Contact your project manager. If unable to contact the project manager, use this list:

For help connecting to PTMS, or comments/suggestions:

Kathy Urda(System Administrator)
(517) 335-2575, urdak@michigan.gov.

For help with an Operating Assistance Report or Report Module:

Sandy Lovell
(517) 335-2525, lovells@michigan.gov

For help entering or updating your vehicle inventory:

Michael Frezell
(517) 335-0904, frezellm@michigan.gov.

For general questions about how to use PTMS:

Andy Brush
(517) 335-2534, brusha@michigan.gov

Janet Holoweiko
(517) 373-7134, holoweikoj@michigan.gov

Management System Resource Center:

For web instructions, updates and background materials on all aspects of the Transportation Management System (TMS):

<http://www.mdot.state.mi.us/planning/TMS>

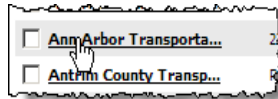
Task Overview:

- Create a New Application
- Create a New Capital Request
- Change Capital Requests
- Create Operating Requests
- Create Transit Agency (TA) Forms
- Update Vehicle Inventory
- Submit Your Application
- View/Edit an Existing Application
- Get Help with PTMS

Instructions

1. Create a New

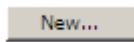
Application: Sign in and click on the name of your agency from the list.



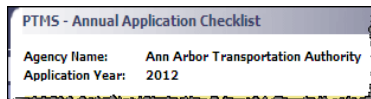
2. Click on the **Application** choice from the menu on the left side of your screen.



3. To create a new application click the **New** button near the top of the screen.



4. This will create your new application and take you to the Checklist screen.



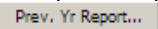
1. Create a New Capital Request:

Click on **Capital Requests** in the left menu.

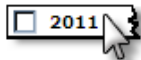


2. If you want to start with a copy from a previous year:

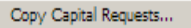
a.) Click the **Prev. Yr. Report** button.



b.) Choose the report to copy.



c.) Click **Copy Capital Requests** button.

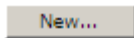


The selected previous request is brought forward into the current year with the date automatically advanced.



Note: You will only be able to do this once, so please copy requests when beginning the application.

3. Otherwise, for a new *blank* Capital Request, click on the **New** button. A new Capital Request opens, showing the Details tab.



4. *For replacement or expansion vehicle requests:* Fill in the required ("*") fields.

- Choosing Vehicle as the **Type** changes the screen.
- **Justification** should identify the specific vehicle(s) to be replaced (by Local ID, VIN, or "71" number), as well as the need *and* the grounds for eligibility.
- Choose Replace or Expand in the **Action** field. The screen changes to add fields toward the bottom.
- Scroll down to choose **Extended** or **Local** purchase type.
- Indicate number of identical vehicles requested with **Duplicate Forms**.

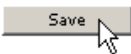
5. *For extended purchase,* complete the **Vehicle Description** and **Additional Options** fields. Insert the estimated options-only price of any additional options for *one* vehicle.

6. *For local purchase,* enter **Vehicle Description**, including any options, and total price for *one* vehicle.

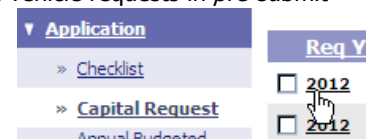
Under the **Vehicle Purchase Request Form List**, you may put the base price as \$0 and the additional price as the amount of the annual lease payment. In the **Justification** field you will need to indicate the number of leased vehicles and which year the lease payment is for, such as "Fifth year of 12-year lease for 121 buses."

Note: *Requests are not complete until you also move to the Vehicle financial screen and specify the vehicles and fiscal years for replacement. See the Vehicle Inventory quick guide for details.*

7. *For equipment/facility requests or rehab/remanufacture vehicle requests,* fill in the required ("*") fields.

- Choosing the **Type** changes the screen (and may require entry of a **Subtype**).
 - **Justification** should state the need *and* the grounds for eligibility (purchase date if applicable), as well as the specific items to be replaced (if any). In the **Description**, describe the specific items to be purchased.
 - Enter the price for the total request in **Request Total**.
 - Clicking or tabbing out of the Request Total field automatically calculates dollar amounts using default 80:20 Federal and State percentages. You may change these percentages by clicking in the appropriate percentage field. Combined percentages must total 100%. Clicking out will recalculate.
 - Remember to enter the required quantity in **Funded Qty**.
8. Click **Save** after all Capital Request entries are done.
- 
9. To request another item, click the **New** button again and proceed as above or below.
- To get a Capital Request hard copy, click **View Report** to open Adobe, then click the **Print** button.
 - To delete a Capital Request in *Pre-Requested* status, check the desired request, then click the **Delete** button.
 - If the application is already submitted, please contact your project manager for any needed deletions.

1. **Changing Capital Requests:** For equipment, facilities, or rehab/remanufactured vehicle requests in *pre-submit* status, just enter changes in the capital request detail screen—and save them.



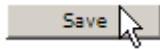
2. To alter the type or number of vehicle (expand or replace) requests, perform the following:

- To delete request forms, first click the checkbox by the unwanted form(s). (Or check the box next to **Base Price** to delete *all* vehicle request forms.) Then click the **Delete Vehicle Forms** button.

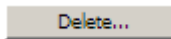
See Next Page →

- To insert additional forms, select a quantity from the **Additional Vehicle Forms** dropdown and click the **Add Vehicle Forms** button.
- To change *local* purchase vehicle type or price, delete all vehicle request forms as just described, and then add new forms with the desired changes.

Note: You may still add capital requests to an already-submitted application. To change a request that is in *Submit/Eligible/Ineligible* status, open the capital request detail screen and *Edit/Modify*. This will activate some fields to allow changes. Refer to the directions above for changing the request. Be sure to save all changes!



3. To delete a Capital Request in *pre-submit* status, open the Capital Request *List* screen, check the request, then click the **Delete** button. An already-submitted Capital Request can only be deleted by contacting your project manager.

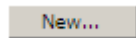


1. **Create Operating Requests:** Click on Annual Budgeted OARs in the left menu.



Note: Annual Budgeted OARs can only be created from within the application. However, once created, they can be accessed both in the application and through the All Operating Reports menu.

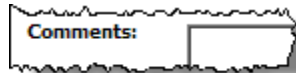
2. Click the **New** button.



3. Select the appropriate service area/type. If the selection you need does not appear, contact your project manager.

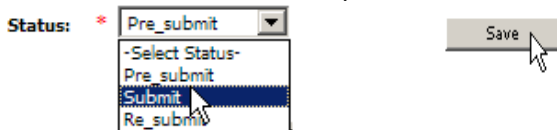
Agency/Service Type: *

4. Verify the information in the **Summary** screen for accuracy and enter any needed Comments.



5. Click **Save**. Complete all needed entries in all other tabs.
 - See the Revenue and Expense Manual for code details.
 - OAR codes are in total by line item, not split into Administrative, Operating, and Maintenance categories.
 - For step by step instructions, see the "Operating Assistance Reports – How To" sheet/section.

6. Submit the OAR when complete by selecting **Submit** in the **Status** field of the OAR Summary screen. Then click **Save**.

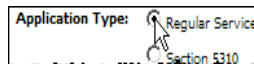


1. **Create TA Forms:** Click on **TA Forms** in the left menu.



Note: You will need Adobe Reader to create TA forms. (See the General Instructions quick guide.)

2. Select the appropriate **Application Type**. The TA Form Types list will change accordingly.



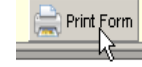
3. Select the desired form by clicking on **Create Form (Edit Form)**. The form will open in an Adobe Acrobat window of

your browser.

4. Fill in all applicable fields on the form.
5. You can print from Acrobat by clicking on **Print**.

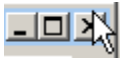


OR



Note: If a form indicates it must be mailed to MDOT, print, sign and mail the form in an envelope bearing proper postage.

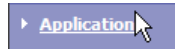
6. Save the form by clicking **Save Form** at the top.
7. To close, click the **X** in the upper right corner.



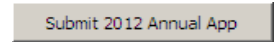
Note: If exactly the same form is needed for multiple application types, you only need to complete it once.

Update Vehicle Inventory: To complete this application submission requirement, see the Vehicle Inventory quick guide.

1. **Submit Your Application:** Click on Application in the left menu.

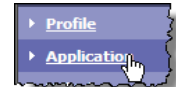


2. Click on the Submit button for the year you wish to submit. Then Click **OK** to confirm submission.



Note: The budget OAR must be submitted separately. Application submission does not change OAR status.

1. **View/Edit an Existing Application:** Click on Application in the left menu.



2. Click the link for the application to edit.



3. Use the left menu to find information to view/edit.

4. **TA Forms** are always available for editing. *Instructions for editing a Budget (OAR) are found in the Operating Assistance Report quick guide.*

Get PTMS Help: Contact your project manager. If unable to contact the project manager, use this list:

For help connecting to PTMS, or comments/suggestions:
 Kathy Urda(System Administrator)
 (517) 335-2575, urdak@michigan.gov.

For help with an Operating Assistance Report or Report Module:
 Sandy Lovell
 (517) 335-2525, lovells@michigan.gov

For help entering or updating your Vehicle Inventory:
 Michael Frezell
 (517) 335-0904, frezellm@michigan.gov.

For general questions about how to use PTMS:
 Andy Brush
 (517) 335-2534, brusha@michigan.gov
 Janet Holoweiko
 (517) 373-7134, holoweikoj@michigan.gov

Management System Resource Center:

For web instructions, updates and background materials on all aspects of the Transportation Management System (TMS):
<http://www.mdot.state.mi.us/planning/TMS>

Task Overview:

- Create a New Operating Assistance Report (OAR) – Quarterly or Reconciled
- View/Print an Existing OAR
- Edit an Existing/Submitted OAR
- Get Help with PTMS

Instructions

1. **Create a New OAR (Quarterly, Reconciled, or Annual Audited):** Sign in and click on the name of your agency from the list. From the left side navigation menu, choose **All Operating Reports**.

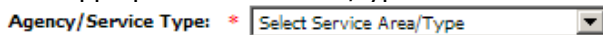


Note: To create a new budget, see the Annual Application *instructions*.

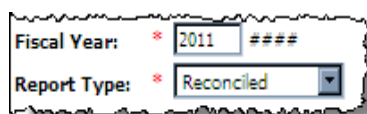
2. Click the **New** button.



3. Use the **Agency/Service Type** drop-down to select the appropriate service area/type.



4. Enter the **Fiscal Year** field and use the drop-down to select the appropriate **Report Type**.



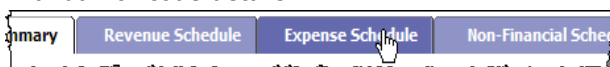
5. Type **Comments** into the text box as needed.



6. Click the **Save** button at the bottom center of the screen.

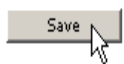


7. Click the **Revenue, Expense, and/or Non-Financial** schedule tabs to enter data. You must **Save** after each tab. See the Revenue and Expense Manual for code details.



8. **Tips:**
 Enter whole dollar amounts without punctuation.
 Enter data by row using the **Tab** key.
 Enter data by column using the **Enter** key.

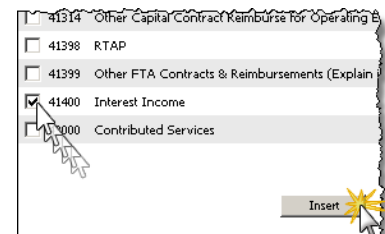
9. After all data is entered, click **Save**.



10. To insert any missed financial code, click **Financial Codes** near the top or bottom of the page.



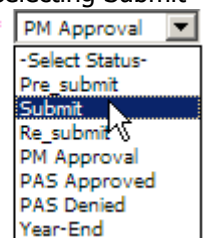
Check the needed codes (or use the box to the left of the "Code" title to select all) and then click **Insert**.



Always **Save** changes!

11. Submit the OAR when complete by selecting **Submit** in the **Status** field of the OAR Summary screen.

Then click **Save**.



12. Your project manager will be automatically notified when your report is submitted.



● Operating Assistance Report (OAR), continued ●

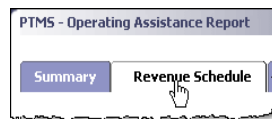
1. **View & Print an OAR:** From the left side navigation menu, choose **All Operating Reports**.



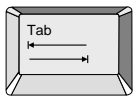
2. Click the line for the report you want to view.

Report Year	Report Type	Agency Type
<input type="checkbox"/> 2011	Annual Budgeted	Nonurban City
<input type="checkbox"/> 2010	Quarterly 1	Urban Township
<input type="checkbox"/> 2009	Reconciled	Urban Township

3. Move from tab to tab to view information.



4. To view columns not shown on screen, use the tab key or the scroll bar at the bottom of the screen.



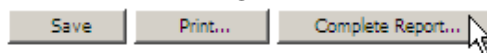
...OR...



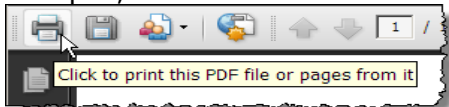
5. Choose the **Print** button at the top or bottom of each screen to print individual pages. Or click the **Complete Report** button to print the entire report.



OR



6. This will open Adobe Acrobat in your browser. To print the report, click **Print** in the Acrobat toolbar.



1. **Edit an Existing/Submitted OAR:** From the left side navigation menu, choose **All Operating Reports**.



2. Click the line for the report you want to view.

Report Year	Report Type	Agency Type	Service Type	Status	OAR Codes	Year
<input type="checkbox"/> 2011	Annual Budgeted	Nonurban City	Regular Service	Submit		2011
<input type="checkbox"/> 2010	Quarterly 1	Nonurban City	Regular Service	PM Approval		2010
<input type="checkbox"/> 2010	Quarterly 2	Nonurban City	Regular Service	Re_submit		2010
<input type="checkbox"/> 2010	Quarterly 3	Nonurban City	Regular Service	Pre_submit		2010

3. The OAR status must be in "Resubmit" to make changes. If necessary, ask your project manager to change the report Status to "Resubmit".



4. Edit any required information, following the instructions given above under the topic *Creating an Operating Assistance Report*. (See steps 5 to 12.)

PTMS - Operating Assistance Report

Summary Revenue Schedule Expense Schedule Non-Financial Schedule

Ann Arbor Transportation Authority

2011 - Annual Budgeted (Nonurban Township/Regular Service)

Save Financial Codes... Print...

Code	Description	Amount DR	Comments
40100	Passenger Fares	70000	
40910	Local Operating Assistance	414100	
41101	State Operating Assistance	347300	
41301	Federal Section 5311 (operating funds only)	158400	
Total Revenues =		\$989,800	

Get PTMS Help: Contact your project manager. If unable to contact the project manager, use this list:

For help connecting to PTMS, or comments/suggestions:

Kathy Urda(System Administrator)
(517) 335-2575, urdak@michigan.gov.

For help with an Operating Assistance Report or Report Module:

Sandy Lovell
(517) 335-2525, lovells@michigan.gov

For help entering or updating your vehicle inventory:

Michael Frezell
(517) 335-0904, frezellm@michigan.gov.

For general questions about how to use PTMS:

Andy Brush
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Janet Holoweiko
(517) 373-7134, holoweiko@michigan.gov

Management System Resource Center:

For web instructions, updates and background materials on all aspects of the Transportation Management System (TMS):

<http://www.mdot.state.mi.us/planning/TMS>

Task Overview:

- Add a New Vehicle
- Change Current Vehicle Information
- Document Local Sale and Disposal of a Vehicle
- Change Vehicle Status to Disposed
- Verify/Complete an Annual Application
- Get Help with PTMS

Instructions

1. **Add a New Vehicle:** Sign in and click on the name of your agency from the list.



From the left side navigation menu, choose **Vehicles**.

2. Click the **New** button.

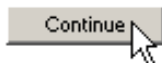


3. Enter vehicle information on *Vehicle Characteristics* screen. Be sure to fill the many required fields ("*"). Be very careful when entering the Vehicle ID Number.



Extreme care must be exercised in entering the Vehicle Identification Number (VIN). Once saved, this is the vehicle's data key and is difficult to change. Be sure to enter a VIN in all caps and double check the title to assure letters/numbers are used correctly. If you make an error entering a VIN, or if the VIN already exists in PTMS, please notify Michael Frezell (contact information on next page).

4. Click the Continue button at bottom of screen.



5. Enter vehicle information on the *financial information* screen, *using no punctuation*.

6. Click the **Finish** button at the bottom of the screen.



7. **Note:** *The Improvement area is only used when vehicles are being rehabbed.*

1. **Changing Current Vehicle Information:** From the left side navigation menu, choose **Vehicles**.



2. Click the line displaying summary information for the vehicle you want to edit.

Vehicle ID	State 71	Le
<input type="checkbox"/> 1B4GH44R6NX203834	712137	0
<input type="checkbox"/> 2B4G		
<input type="checkbox"/> 2G4W		

Click here to edit the vehicle 1B4GH44R6NX203834

3. Edit the necessary information. For mileage updates, please enter new values for **Current Miles** and **Miles As Of** date.

4. When you have completed your changes, click **Save**.



1. **Vehicle Local Sale & Disposal:** Submit the required paperwork to MDOT if the vehicle is being sold. Please complete the Vehicle Disposal/Transfer Request Form, which is Attachment A of the Local Disposal of Vehicles or Equipment procedure. For details, refer to the OPT website at <http://www.michigan.gov/mdotptd>, Resources, Reference Manual for Transit Agencies, Equipment-Facilities.

2. When a vehicle is approved for disposal, MDOT will change the PTMS *status* of that vehicle to *Local Sale* for all agencies. *See Next Page* →

Type	Mdl Yr	Status	Miles	VRR	VR
LrgHvryDty	1992	LOCAL SALE	455,458	2003	
LrgHvryDty	1992	LOCAL SALE	418,770	2003	

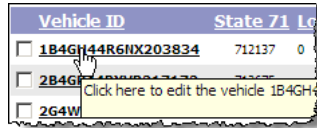
3. Once the vehicle is sold, you will need to change the *status* of the vehicle to *Disposed*. (See below.)



- a. **Change Vehicle Status to Disposed:** From the left side navigation menu, choose **Vehicles**.



- b. Click on the line displaying summary information for the vehicle that was sold.



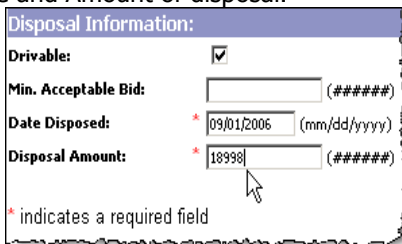
- c. In the Status field, choose *Disposed*.



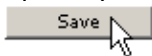
- d. PTMS will ask you to confirm the status change. Click OK to continue.



- e. Scroll down to enter other requested information such as Date and Amount of disposal.

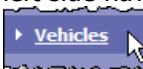


- f. When you have completed your changes, click **Save**.



Note: Once you have changed the Status to Disposed and Saved the record, that vehicle will no longer appear on your inventory.

1. **Verify/Complete Annual Application:** From the left side navigation menu, choose **Vehicles**.



2. Verify all revenue vehicles are listed in the inventory, and all disposed vehicles have been removed.

PTMS - Transit Agency Vehicle Listing

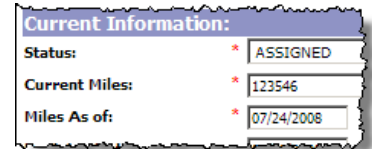
Fleet Information for 'Ann Arbor Transportation Authority'

Total Fleet: 92 Total Lift: 92 Spare Ratio (20% and below meets guidelines): 20%
 Total Spare Vehicles: 19 (##) Total at Peak Hour: 61 (##)

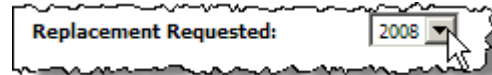
Buttons: New..., Delete, Save, Search/Sort..., View Report...

Vehicle ID	State 71	Local ID	Type	Mod Yr	Status	Miles	VRR	VRF
<input type="checkbox"/> 1566B201031073504	-	428	LrgHvyDty	2003	ASSIGNED	40,359	-	-
<input type="checkbox"/> 1566B201231073505	-	429	LrgHvyDty	2003	ASSIGNED	35,356	-	-
<input type="checkbox"/> 1566B201531073501	-	425	LrgHvyDty	2003	ASSIGNED	29,100	-	-
<input type="checkbox"/> 1566B201731073502	-	426	LrgHvyDty	2003	ASSIGNED	31,303	-	-
<input type="checkbox"/> 1566B20193107	-	427	LrgHvyDty	2003	ASSIGNED	34,138	-	-
<input type="checkbox"/> 1566B2211X1070694	713003	392	LrgHvyDty	1999	ASSIGNED	212,954	-	-
<input type="checkbox"/> 1566B2211Y1070681	713738	399	LrgHvyDty	2000	ASSIGNED	221,775	-	-
<input type="checkbox"/> 1566B2213X1070695	713001	393	LrgHvyDty	1999	ASSIGNED	226,752	-	-
<input type="checkbox"/> 1566B2213Y1070682	713739	400	LrgHvyDty	2000	ASSIGNED	206,002	-	-
<input type="checkbox"/> 1566B2215X1070696	713122	394	LrgHvyDty	1999	ASSIGNED	181,116	-	-
<input type="checkbox"/> 1566B2215Y1070683	713740	401	LrgHvyDty	2000	ASSIGNED	199,326	-	-

3. On the *Vehicle Characteristics* screen, for each vehicle, update the *Miles* and *Miles As Of* date, and verify/complete all other data.



4. On the Financial screen, for each vehicle, indicate if a replacement for this vehicle has been requested, and verify/complete all other data.



5. When you have completed your changes, click the **Save** button at the bottom of the screen.



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