



# CUPSS Training

Part 1 of 3 Sessions

[www.epa.gov/cupss](http://www.epa.gov/cupss)

[cupss@epa.gov](mailto:cupss@epa.gov)



# Helpful Tips for Today's Session

- **To Ask a Question** – Type your question in the Q&A panel on the right side of your screen. If the panel is hidden, click on the control panel at the top to open Q&A.
- **To Answer a Poll Question** – Choices will be in the poll panel on the right side of the screen. If the panel is hidden, click on the control panel at the top to open the poll.



## Cisco webex

For assistance joining or participating in this WebEx session, please **contact WebEx support**.

Within the United States: **1-866-229-3239**

International support numbers [can be found here](#)

When you contact WebEx support, you will need to provide the following information:

WebEx Site: **icohere-epa.WebEx.com**

WebEx Session ID: **642 540 873**



**Audio Conference**

Use your phone or computer to join this audio conference.

**Use Phone**

1. Call in to the session:  
**+1-415-655-0003** (US TOLL)

2. Enter the access code:  
**642 540 873 #**

3. Enter your Attendee ID:  
**24145 #**

**Use Computer for Audio**

**Cisco WebEx Training Center**

File Edit Share View Audio Participant Session Breakout Help

Quick Start Session Info

**Topic:** CUPSS Training Session Practice

**Host:** Susanna Bains  
**Audio Conference:** US TOLL +1-415-655-0003  
**Access code:** 642 540 873  
**Attendee ID:** 24145  
**Training session number:** 642 540 873

Application Share

You are no longer viewing the presenter's shared content.

Return to Sharing

Chat Q&A

Chat

Send to: All Participants

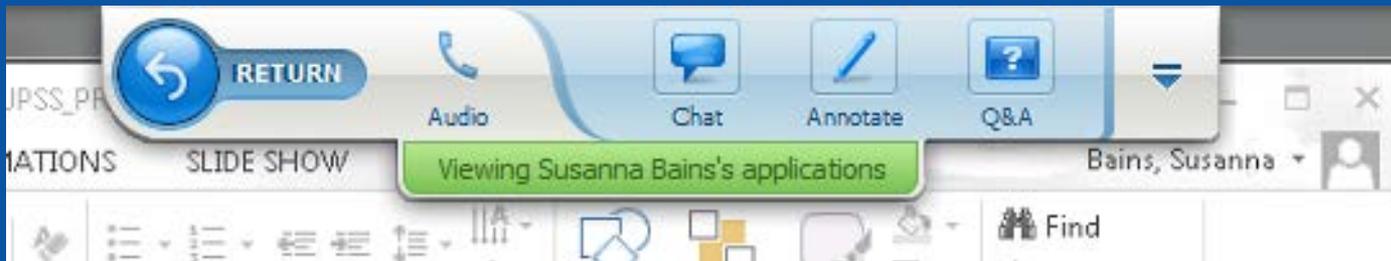
Send

Q&A

All (0)

Select a question, and then type your answer here. There is a 255-character limit.

Send Send Privately...





# Today's Panel

## CUPSS Program Team

Susanna Bains, ORISE Fellow, USEPA

Adrienne Harris, USEPA

Cindi Atwood, TetraTech



# Structure for CUPSS Training

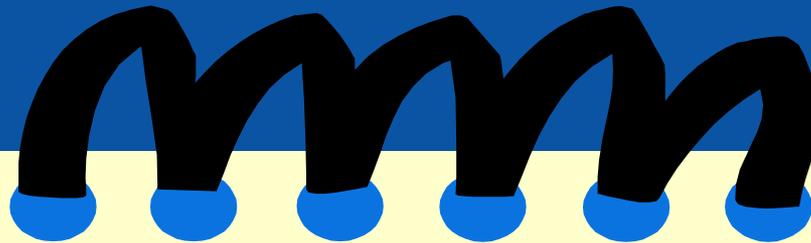
## 3 training sessions

- Overview of each module
  - Description
  - Screenshots
- Exercises on how to use each module
- Quiz-type polling questions
- Q&A after each exercise
- Homework after each session
- Review quiz and Q&A at beginning of sessions 2 and 3
- Final test





# Today's Agenda



- Preparing to Use CUPSS
- Session 1
  - Installation
  - Setting Up CUPSS
  - Login & Navigation
  - Help
  - My Inventory
  - My Asset Check Up Report
- Session 1 Your CUPSS



# Goals of Session 1

1

Prepare to use CUPSS

2

Download and install  
CUPSS

3

Set-up the utility's basic  
information

4

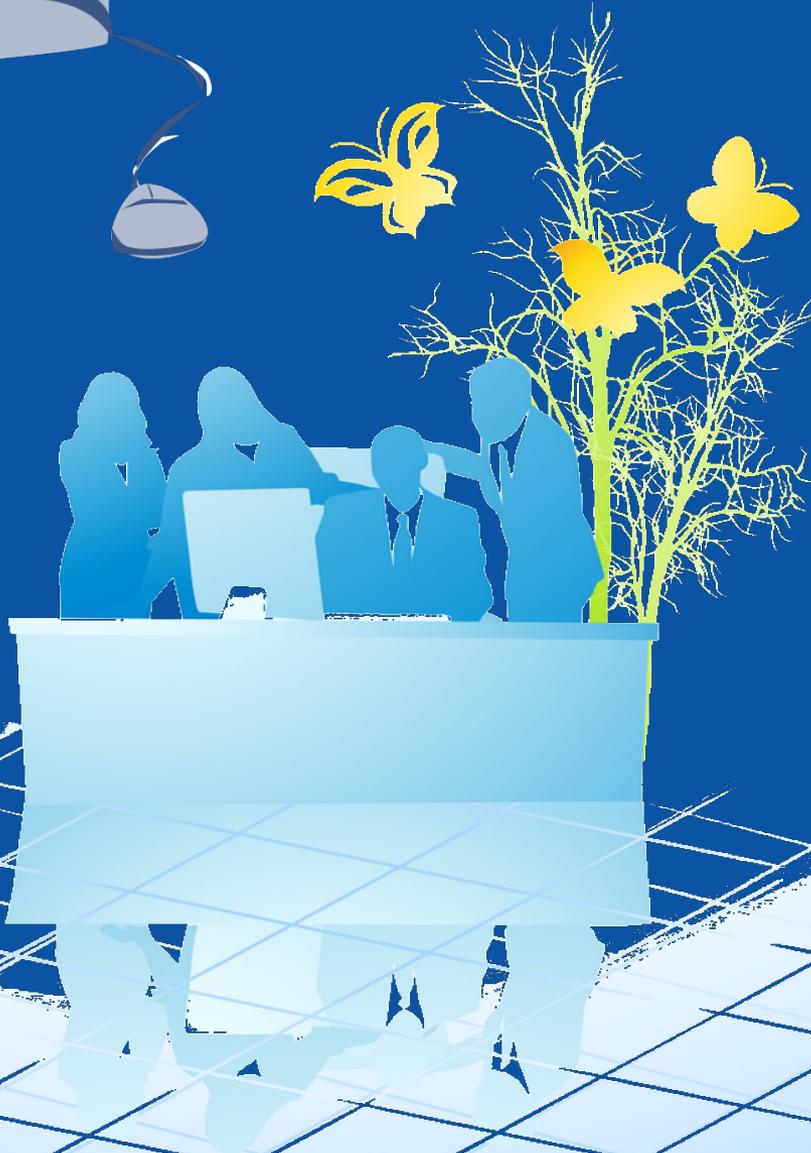
Login and navigate CUPSS

5

Create the asset inventory

6

Create a customized asset  
report





# Prepare to Use CUPSS

- Understand how CUPSS can be used to implement asset management
- CUPSS Specific Resources
  - Getting Started With CUPSS Workbook
  - CUPSS Trainer's Guide
  - CUPSS User's Guide/Help
  - Best Practices Guide and Fact Sheets
  - Ongoing Support
  - Example CUPSS: Beauty View Acres





# Asset Management is...

*"A process for maintaining a desired level of customer service at the best appropriate cost."*





# Asset Management includes....

- Building an inventory of assets
- Scheduling and tracking maintenance tasks through work orders
- Managing budgeted and actual annual expenses and revenue



# Asset Management will...

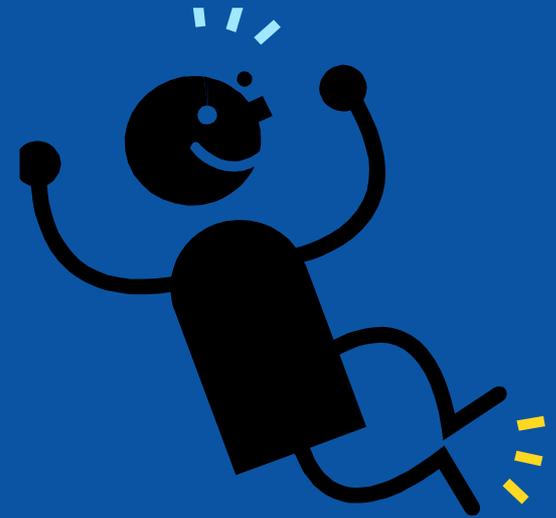
- Give systems a documented understanding of
  - the assets they have,
  - how long they are going to last, and
  - how much it's going to cost to repair, rehabilitate, or replace them
- Provide financial projections and allows the utility to see if
  - rates and other revenue generating mechanisms are enough to stay in the business of safely providing drinking or clean water to customers

**Give utilities the basis to make good decisions**



# Benefits of Asset Management

- Make more informed decisions
- Save time by planning ahead
- Back up budget talks with solid facts
- Improve customer service





# Asset Management Core Questions

1

What Is The Current State Of The Utility's Assets?

2

What Is The Utility's Required Sustained Level Of Service (LOS)?

3

Which Assets Are Critical To Sustained Performance?

4

What Are The Utility's Best Capital Improvement Project (CIP) and O&M Strategies?

5

What Is The Utility's Best Long-term Financing Strategy?



# Asset Management Core Question

## Question 1 of 5

1

### What Is The Current State Of The Utility's Assets?

- What does the utility own?
- Where is it?
- What is its condition?
- What is its useful life?
- What is its value?





# Asset Management Core Question

## Question 2 of 5

2

What Is The Utility's Required Sustained Level Of Service (LOS)?

- What do the regulators require?
- What are the utility's performance goals?
- What LOS do the customers demand?
- What are the physical capabilities of the assets?





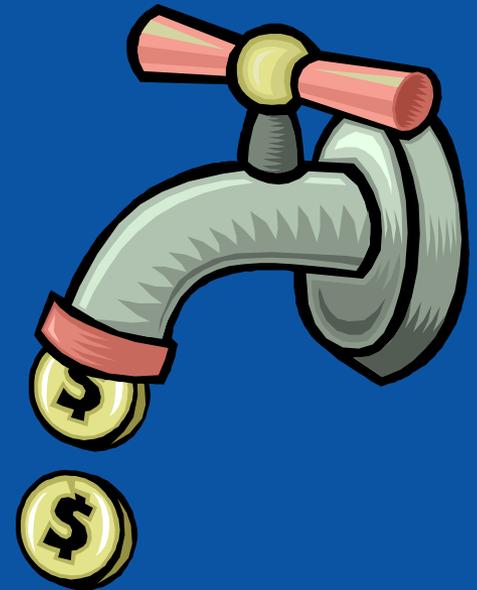
# Asset Management Core Question

## Question 3 of 5

3

### Which Assets Are Critical To Sustained Performance?

- How can assets fail?
- How do assets fail?
- What are the likelihoods and consequences of asset failure?
- What does it cost to repair the asset?
- What are other costs that are associated with asset failure?





# Asset Management Core Question

## Question 4 of 5

4

What Are The Utility's Best Capital Improvement Project (CIP) and O&M Strategies?

- What alternative management strategies exist?
- What strategies are the most feasible for my organization?





# Asset Management Core Question

## Question 5 of 5

5

What Is The Utility's Best Long-term Financing Strategy?

- Do we have enough funding to maintain our assets for our required level of service?
- Is our rate structure sustainable for our system's long-term needs?





# Develop an Asset Management Plan

Develop basic Asset Management plans based on:

- Best available current information
  - Existing levels of service
  - Existing management strategies and opportunities for improvement
- Cash flow projection – five to ten years
- Establish financial and performance benchmarks



# Introduction to CUPSS

**CUPSS Check Up Program for Small Systems** Set-up | Switch Utility | Create User | Help | Training | Exit

My Home | My Inventory | My O & M | My Finances | My Check Up | My CUPSS Plan

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

- Do Some Training
- Create or Update My Schematic
- Create or Update My Inventory
- Print My Check Up Reports
- Enter a New Task or Work Order
- Search Asset and Maintenance
- Enter My Finances
- Work on My CUPSS Plan

**My Calendar**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**My Messages and Alerts**

Popup Messages Are On. Click To Turn Off.

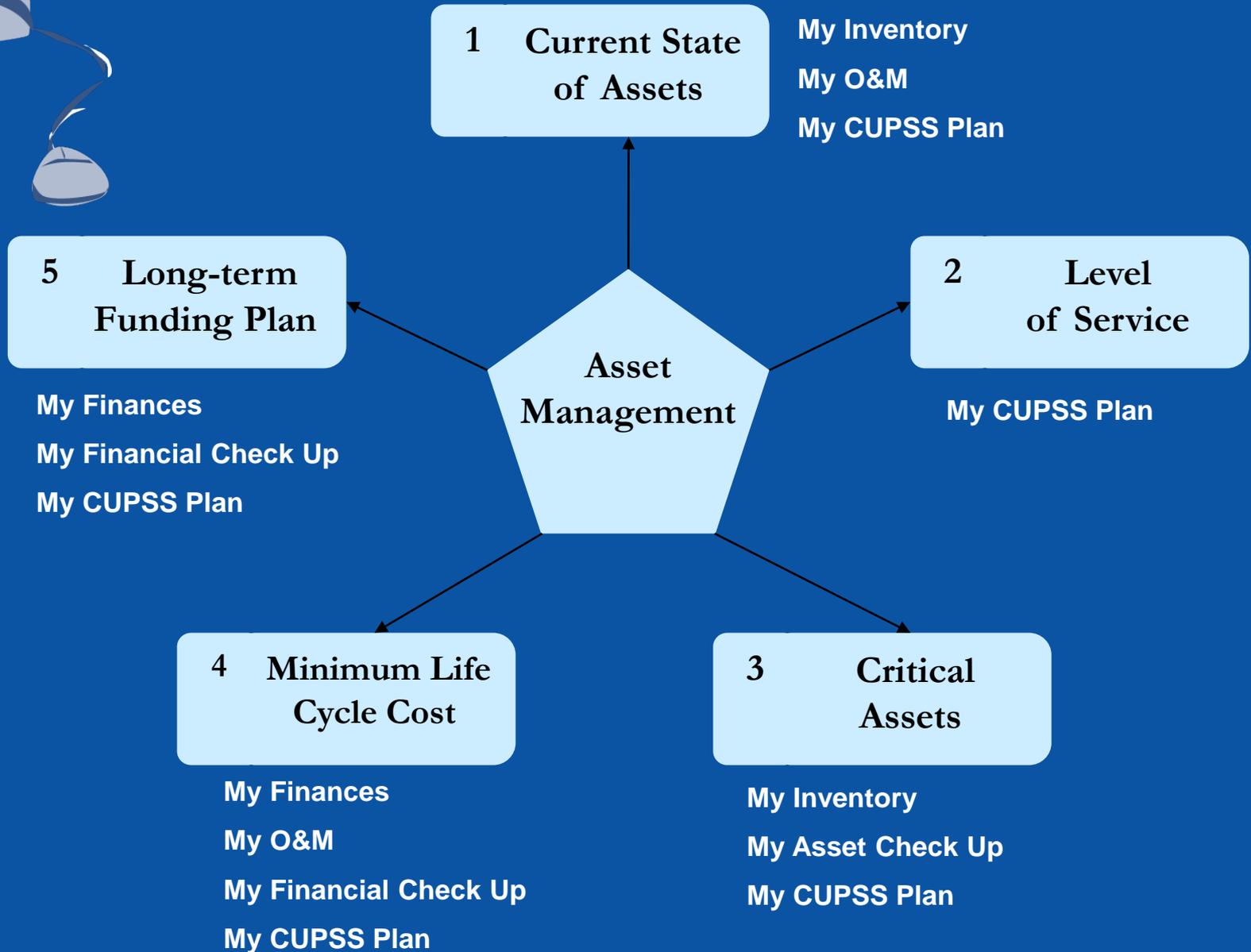
Reminder - Today's Tasks	8
Tasks Currently Past Due	481
Assets Needing Update	0
Number of High Risk Assets	3

- Free Asset Management tool
- Tool developed in partnership with trainers like you
- 'Desktop software' – program that runs on your computer
- Series of modules that store information about a user's utility



# Asset Management Core Questions

## CUPSS Modules





# CUPSS User's Guide/Help

**Designed to help you work with the CUPSS application and includes:**

- Directions on how to install the software on your computer
- Description of all the functions and capabilities of CUPSS
- Step-by-step instructions for using the application to develop and implement an asset management plan





# Best Practices Guide and Fact Sheets



## Asset Management for Local Officials

This guide will help you understand:

- The basics of asset management.
- Local officials' vital role in successfully implementing an asset management program.

This fact sheet is intended for local officials, owners and operators of public water systems, technical assistance providers, and state personnel.

### Asset Management

Asset management is maintaining a desired level of service, that is, what you want your assets to provide, at the lowest life cycle cost. This means the best appropriate cost – not without cost. Public water systems should:

- Address aging water infrastructure assets before they fail.
- Keep assets productive, and not allow them to become disruptive.
- Maximize limited financial resources by treating all decisions as investments.
- Make costs transparent to help justify project priorities to the public.

Asset management requires:

- Support and involvement of local officials who have the authority to commit public resources and personnel.
- A commitment of time and money to make cost-effective asset management decisions (not save more money over the long-term).
- A team made up of key decision makers.

### Improving Service and Maintaining Infrastructure Through Asset Management

A sustainable water service delivers safe, clean water to its customers' satisfaction and maximizes their useful life. An asset management program will help you understand the true costs of water service. Small systems that have simple asset management plans and large systems that have complex plans. Asset management will enable your system to:

- Have more efficient and focused operations.
- Choose capital projects that meet the system's true needs.
- Base rates on sound operational decisions.
- Improve its financial health.
- Reduce environmental violations due to failed or poorly performing assets.
- Improve the security and safety of infrastructure assets.

### The Five Core Questions of Asset Management

A good starting point for any system are five core questions, which walk you through the process of asset management.

1. What is the current state of my assets?  
Your water infrastructure assets are part of your community's total infrastructure. Insufficient funding of asset management can lead to a decline in service.
2. What is my desired "sustainable" level of service?  
Your desired sustainable level of service is the set of features that you want your system to provide. This level of service is the basis for justifying your user rates.
3. Which assets are critical to sustained performance?  
Identifying critical assets will help you make decisions about resource allocation to maintain your sustainable level of service.



## Asset Management: A Best Practices Guide

### Introduction

This guide will help you understand:

- What asset management means.
- The benefits of asset management.
- Best practices in asset management.
- How to implement an asset management plan.

*Purpose*

This guide is intended for owners, managers, and operators of public water systems, local officials, technical assistance providers, and state personnel.

*Target Audience*

### Asset Management

Maintaining a desired level of service (what you want your assets to provide) at the lowest life cycle cost (best appropriate cost - not without cost).

#### Challenges faced by Public Water Systems

- Aging assets.
- Increasing demand for services.
- Resistance to rate increases.
- Diminishing resources.
- Determining the best (or optimal) time to repair, replace, or renew assets.
- Rising service expectations of customers.
- Increasingly stringent regulatory requirements.

#### Benefits of Asset Management

- Budgets focused on activities critical to sustained performance.
- Financial management and rates based on sound operational information.
- Efficient and focused operations and maintenance to prolong asset life and aid repair/replace decisions.
- Ability to meet consumer demands with a focus on system sustainability.
- Improved response to emergencies.
- Security and safety of assets improved.

### Implementing Asset Management: Five Core Questions Framework

There are many asset management best practices that are constantly being improved upon. You will become more familiar with these approaches as you implement your asset management program. A good starting point for any size system is the five core questions framework. This framework walks you through all of the major activities associated with asset management and can be implemented at the level of sophistication reasonable for a given system.



## Building an Asset Management Team

This guide will help you understand:

- How to build a successful asset management team.
- The roles of local officials, owners and operators of public water systems, technical assistance providers, and state personnel.

### Introduction

Asset management is an initial investment in time and resources. The savings from asset management are realized over the life of the asset, not a 1-year project, or even a 5-year project. It is a continual, fundamental change in the way we manage. Successful asset management programs are characterized by a commitment to:
 

- Make the most of the money to implement the program.
- Make cost-effective asset decisions.
- Maintain a desired level of service for the community.

Asset management is implemented by a team that includes:
 

- Local officials who have the authority and willingness to commit public resources and personnel.
- Technical assistance providers who represent the departments involved with asset management.

### Building an Asset Management Culture

Asset management can be the first step towards having a sustainable water system. With the limited resources available, shifting away from reacting to events and towards making strategic plans can lead to real savings. More beyond an unsophisticated pipe-replacement plan based on a simple formula that does not take into account the long-term life cycle of performance, not on the day-to-day aspects of the asset. It involves a shift in a water system's management philosophy.

Asset management is a business environment.
 

- All asset decisions are investment decisions.
- Asset management is driven by results (sustainability).
- Asset management is a champion to promote and articulate the benefits of asset management to decision makers, local officials, operators, managers, elected officials, or stakeholder who coordinates the implementation of the asset management program.

### Building a Successful Asset Management Team

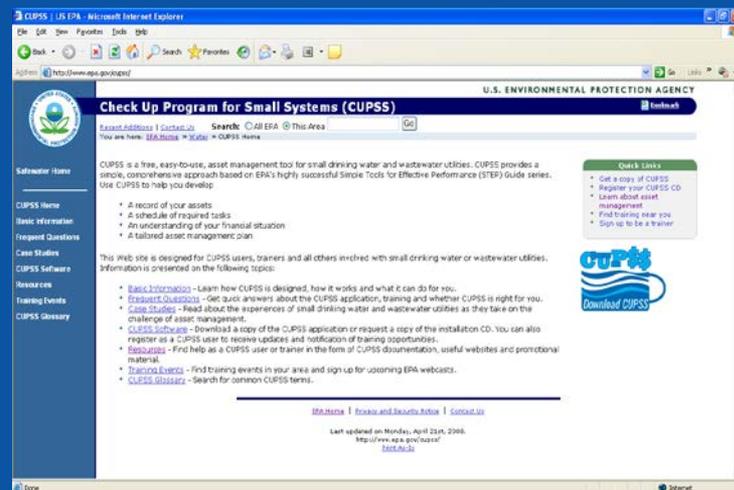
Asset management is a team effort. It requires authority and resources to answer the core questions that lead to asset investment decisions. An asset management team should include:

- Local officials who encourage critical thinking.
- Local officials who are open to sharing ideas and information through open and transparent debate.
- Local officials who focus on problems and share the success, not the blame.
- Local officials who build trust and develops partnerships.
- Local officials who use the results of asset management as a basis for the program.
- Local officials who focus on achieving goals during planning to achieve early gains.



# Ongoing Support

- CUPSS Website
  - [www.epa.gov/cupss](http://www.epa.gov/cupss)
- CUPSS Email
  - [cupss@epa.gov](mailto:cupss@epa.gov)
- Listservs
  - User's
  - Trainer's





# Example CUPSS - Beauty View Acres

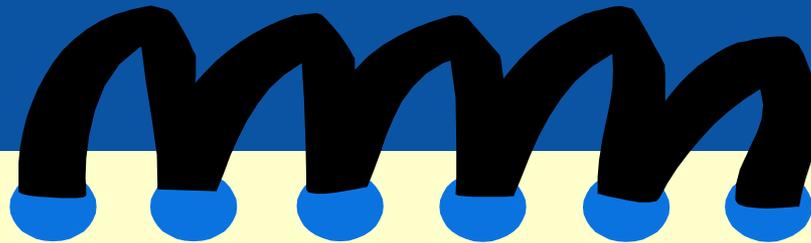
Included with the CUPSS application to provide real life drinking water and wastewater utility examples:



- Beauty View Acres Subdivision in Franklin County, MO
  - Primary water source: **Groundwater**
  - Wastewater: **Sewer**
  - Population served: **75**



# Today's Agenda



- Preparing to Use CUPSS
- Session 1
  - Installation
  - Setting Up CUPSS
  - Login & Navigation
  - Help
  - My Inventory
  - My Asset Check Up Report
- Session 1 Your CUPSS



# INSTALLATION WIZARD

## **Benefits to My Utility**

CUPSS is a free, easy to install and use application to help manage a utility's assets, tasks, create financial projects, and generate management plans.



# Why Install CUPSS?

- Managing assets will help a utility be more efficient and financially self sufficient
- Installing CUPSS can be the first step in implementing asset management for a utility





# Basic Computer Requirements

- 1 GHz Processor
  - 2 GB Recommended
- Minimum 512 MB RAM
  - 1 GB Recommended
- Minimum 1.5 GB Hard Drive Disk Free Space
  - 2 GB Recommended
- At least 800x600 capable video card





# CUPSS Software

- Install the CUPSS software on your computer by:
  - Using the CUPSS CD
  - Download from the CUPSS Website ([www.epa.gov/cupss](http://www.epa.gov/cupss))
- Launch the CUPSS Installation Wizard





# Poll Question

Have you installed CUPSS on your personal computer?

- A. Yes
- B. No
- C. I'm installing right now



# Installation Wizard

**CUPSS - Check Up Program for Small Systems** [Minimize] [Maximize] [Close]

### Introduction

- Introduction
- Choose Shortcut Folder
- Choose Install Folder
- Pre-Installation Summary
- Installing...
- Install Complete

InstallAnywhere will guide you through the installation of CUPSS.

It is strongly recommended that you quit all programs before continuing with this installation.

Click the 'Next' button to proceed to the next screen. If you want to change something on a previous screen, click the 'Previous' button.

You may cancel this installation at any time by clicking the 'Cancel' button.

InstallAnywhere by Macrovision



# Installation Wizard

CUPSS - Check Up Program for Small Systems

**Install Complete**

- Introduction
- Choose Shortcut Folder
- Choose Install Folder
- Pre-Installation Summary
- Installing...
- Install Complete

Congratulations! CUPSS has been successfully installed to:  
C:\Program Files\CUPSS  
Press "Done" to quit the installer.

InstallAnywhere by Macrovision

Cancel Previous Done



# SETTING UP CUPSS

## **Benefits to My Utility**

CUPSS can help you save time by setting up default tasks and helping you establish an operation and maintenance plan.



# Why Set Up CUPSS?

- Customize utility information
- Add personal user information
- Include basic O&M tasks
- Add other users and team members





# Think about the Asset Management Plan

Setting up CUPSS is the first step toward generating a customized asset management plan. This set up process allows a utility to identify key tasks and team members to keep the utility on track.

# Welcome Screen



Check Up Program for Small Systems (CUPSS)

Check Up Program for Small Systems (CUPSS)



**Welcome to CUPSS**  
Brought to you by USEPA



Welcome! CUPSS is meant to make asset management easy for you. To make it even easier to use CUPSS, information from a small community with both drinking water and wastewater assets has been provided as an example. You may view the example or proceed directly to Your CUPSS.

**Enter Example CUPSS** **Enter Your CUPSS**

**Trainers - Advanced Options**

Select Database:  **Enter**

**Create Database** **Load Database** **Remove Database**



# CUPSS Start Up

 **Check Up Program for Small Systems**

**Welcome CUPSS Users**

Welcome to CUPSS!  
CUPSS is meant to make asset management easy for you. Now lets get started.

[Do Some Training](#)

[Lets Get Started](#)

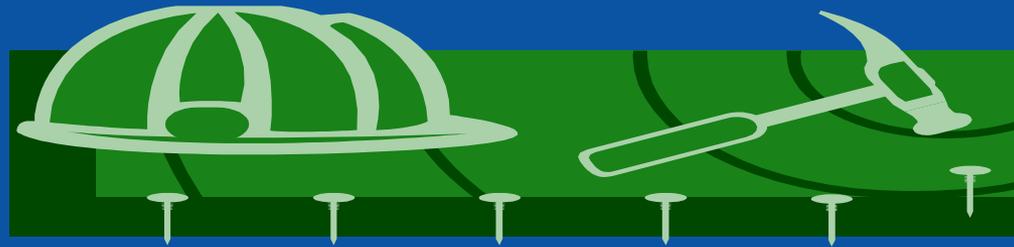


CUPSS is brought to you by the [US Environmental Protection Agency](#).



# Get Started Using CUPSS

There are five steps in the Getting Started module:



1. Enter utility information
2. Enter user information
3. Schedule operations and maintenance tasks
4. Enter information about your team
5. Review and save data



# Utility Information

If you have multiple projects that you would like to enter into CUPSS, enter the utility name and then the project name.  
Ex. Beauty View Acres - DW

A screenshot of the CUPSS web application interface. The window title is 'Check Up Program for Small Systems (CUPSS)'. The main heading is 'Check Up Program for Small Systems'. Below this is a progress bar with five steps: 'Utility Info' (highlighted in red), 'User Info', 'O&M', 'Team', and 'Review'. A link 'Do Some Training' is on the right. The main text says 'The first step in setting up CUPSS is to enter your basic utility information.' followed by a red question mark icon. A red note states '(\*) Indicates required fields'. The form contains several input fields: '\* Utility Name' (text box with red question mark), '\* Select Type of Facility' (radio buttons for 'Drinking Water' and 'Wastewater'), '\* PWSID' (text box with red question mark), '\* NPDES Number' (text box with red question mark), '\* Estimated Number of Connections' (text box with red question mark), '\* Flow (mgd)' (text box with red question mark), '\* Average Customer Bill' (text box with red question mark), 'CWNSID' (text box with red question mark), '\* Number of Customers' (text box with red question mark), '\* Street Address' (text box), '\* City, State, Zip' (text box, dropdown menu labeled 'Select state', and text box), '\* County' (text box), 'Phone, Fax' (two text boxes), and '\* Email' (text box). A blue 'Continue' button is at the bottom.



# Utility Information

Check Up Program for Small Systems (CUPSS)

## Check Up Program for Small Systems

Getting Started: Utility Information

Utility Info

The first step in setting up CUPSS is to enter your basic information.

**(\*) Indicates required fields**

- \* Utility Name
- \* Select Type of Facility
- \* PWSID
- \* Estimated Number of Connections
- \* Average Customer Bill
- \* Number of Customers
- \* Street Address
- \* City, \* State, \* Zip
- \* County
- Phone, Fax
- \* Email
- \* Flow (mgd)
- CWNSID

[Do Some Training](#)

Number of Customers is required.  
Address is required.  
City is required.  
State is required.  
Zip Code is required.  
County is required.  
Email is required.

OK

Continue



# User Information

Check Up Program for Small Systems (CUPSS)

**CUPSS** Check Up Program for Small Systems

**Getting Started: Your Information**

Utility Info — **User Info** — O&M — Team — Review

The second step in setting up CUPSS is for you to fill out your information and create your account for accessing CUPSS. Enter your name and contact information; then select a username and password to access CUPSS ?

**(\*) Indicates required fields**

\* Name

Organization  Title

Email  \* Role  ?

Same as Utility

Street Address

City, State, Zip  Select state

Phone, Fax

\* Enter Username  ?

\* Enter Password  ?

\* Confirm Password

**Continue**



# Operations and Maintenance

## 4 different schedules for O&M Tasks

- Daily
- Weekly
- Monthly
- Annually





# O&M Tasks

■ Check Up Program for Small Systems (CUPSS) [min] [max] [close]

**CUPSS** Check Up Program for Small Systems

**Getting Started: Utility Operation and Maintenance Default Daily Tasks** O&M Page 1 of 4

Utility Info — User Info — **O&M** — Team — Review

The third step in setting up CUPSS is for you to review basic preventive maintenance tasks recommended by US EPA. You can select or deselect all items and change the frequency of the tasks. ?

[Select All Tasks](#) | [Deselect All Tasks](#)

Daily Tasks	Scheduled Day for Maintenance
<b>The following routine maintenance tasks are set to occur daily</b>	
<input type="checkbox"/> Check water meter readings and record water production.	Change tasks recurrence frequency to <input type="text" value="Select Frequency"/> Times/day <input type="text" value="1"/> Weekly recurrence every <input type="text" value=""/> Week(s) on <input type="text" value="Select Day"/> Monthly recurrence on <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> every month Annual recurrence the <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> of <input type="text" value="Select Month"/>
<input type="checkbox"/> Check chemical solution tanks and record amounts used.	Change tasks recurrence frequency to <input type="text" value="Select Frequency"/> Times/day <input type="text" value="1"/> Weekly recurrence every <input type="text" value=""/> Week(s) on <input type="text" value="Select Day"/> Monthly recurrence on <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> every month Annual recurrence the <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> of <input type="text" value="Select Month"/>
<input type="checkbox"/> Check and record water levels in storage tanks.	Change tasks recurrence frequency to <input type="text" value="Select Frequency"/> Times/day <input type="text" value="1"/> Weekly recurrence every <input type="text" value=""/> Week(s) on <input type="text" value="Select Day"/> Monthly recurrence on <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> every month Annual recurrence the <input type="text" value="Select Week"/> <input type="text" value="Select Day"/> of <input type="text" value="Select Month"/>
<input type="checkbox"/> Inspect chemical feed pumps.	Change tasks recurrence frequency to <input type="text" value="Select Frequency"/> Times/day <input type="text" value="1"/> Weekly recurrence every <input type="text" value=""/> Week(s) on <input type="text" value="Select Day"/>



# Assemble Your Team

Your team may include the following people:

## Benefits to My Utility

CUPSS can help you save your team member contacts in one easy to find place. These team members will later help you prepare and implement your Asset Management Plan.

- Water system operators
- Engineers
- Local and elected officials
- Accounting staff
- Information technology staff
- Treasurer
- Other infrastructure managers and staff from other utilities
- Representatives from environmental groups
- Representatives from neighboring water districts
- Members of the community
- And anyone else you work with in your day-to-day operations.

# Add Team Members



Check Up Program for Small Systems (CUPSS)

## Check Up Program for Small Systems

Getting Started : Assemble Your Team (Optional)

Utility Info — User Info — O&M — **Team** — Review

The fourth and final step in setting up CUPSS for your utility is to assemble your team. This is an optional, but highly recommended, step where you can indicate any contacts that may help you in assembling your information for CUPSS such as town staff, your utility staff or other stakeholders involved in the development of your asset management plan. They may or may not be actual CUPSS users.

(\*) Indicates required fields

\*Name     CUPSS User ?

Organization  Title

Email  \*Role

Same as Utility

Street Address

City, State, Zip  Select state

Phone, Fax

Enter Username  ?

Enter Password  ?

Confirm Password

Team members

Name / Title	Organization	Email	Address	Role
--------------	--------------	-------	---------	------



# Set Up Review

Check Up Program for Small Systems (CUPSS)

**Check Up Program for Small Systems**

**Getting Started: Review and Save**

Utility Info — User Info — Team — **Review**

Before moving on, review all of the information you just added. You will have an opportunity to edit this information once you have begun using CUPSS by clicking the "Set-Up" link at the top right hand side of the CUPSS navigation bar. If you see anything that you would like to change click on the [Back and Edit] button.

**Utility Information**

<b>Utility Name:</b>	Beauty View Acres Subdivision - DW
<b>PWSID:</b>	MO6036219
<b>Estimated Number of Connections:</b>	33
<b>NPDES Number:</b>	
<b>CWNSID:</b>	
<b>Flow (mgd):</b>	
<b>Address:</b>	123 Main St Gray Summit Missouri 63039 Gray County
<b>Phone/Fax:</b>	
<b>Email:</b>	bwacres@yahoo.com

**Your Information**

<b>Name:</b>	Example	User
<b>Title:</b>		
<b>Organization:</b>	USEPA	
<b>Role:</b>	Facility Manager	
<b>Email:</b>	your_email@your_server.com	
<b>Address:</b>	123 Main St Gray Summit Missouri 63039	



# CUPSS Example

## Setting Up CUPSS Exercise





# Q&A on Setting Up CUPSS



# LOGIN AND NAVIGATION

## **Benefits to My Utility**

CUPSS provides a secure interface and allows you to set-up multiple users to work on a utility.

# Login



 **Check Up Program for Small Systems**

**Welcome CUPSS Users**

User name:

Password:

[Login](#)

[Forget Password](#)



CUPSS is brought to you by the [US Environmental Protection Agency](#).



# Password Information

```
CupssPasswords_04-16-2008.txt - Notepad
File Edit Format View Help
| USERNAME/PASSWORD
-----
HHOWARD/BEAUTY1
BDUNLEVY/BEAUTY1
SWYATT/bEAUTY1
DDAUGHERTY/BEAUTY1
JHOAGLAND/BEAUTY1
DSIDERS/BEAUTY1
SBOWMAN/BEAUTY1
AMCDONALD/BEAUTY1
```

# Select Utility



**CUPSS** Check Up Program for Small Systems

**Welcome Helen, Select the CUPSS Utility that you would like to work on.**

Select the utility you would like to work on. If you have one utility it should already be selected and you can just click on the [Load Utility] button to get started using CUPSS.

Beauty View Acres Subdivision - DW

**Load Utility** **Add Another Utility**

**Welcome Example, Select the CUPSS Utility that you would like to work on.**

Select the utility you would like to work on. If you have one utility it should already be selected and you can just click on the [Load Utility] button to get started using CUPSS.

Beauty View Acres Subdivision - DW  
Beauty View Acres Subdivision - DW  
Beauty View Acres Subdivision - WW

## Benefits to My Utility

CUPSS lets you add as many utilities as you like. If you manage a drinking and wastewater utility you can create a single My CUPSS Asset Management Plan for both utilities.



# CUPSS Homepage

**Benefits to My Utility**  
CUPSS reminders help you track and monitor tasks and high risk assets needing close monitoring in one easy to use tool, saving you time. So be sure to keep your CUPSS up-to-date!

The screenshot shows the CUPSS homepage for 'Example, Beauty View Acres Subdivision - DW'. The interface includes a navigation bar with icons for 'My Home', 'My Inventory', 'My O & M', 'My Finances', 'My Check Up', and 'My CUPSS Plan'. A 'Task Notification' popup window is open, displaying a table of tasks with columns for 'Task Name', 'Task Due Date', and 'Task Status'. The tasks are categorized as 'TODAY'S TASK' or 'PAST DUE TASK'. The popup also includes a 'Close' button and the instruction 'Right Click on Item to Edit'. The background interface shows a 'My Calendar' widget and a summary of tasks: 'Remmuer - Today's Tasks' (8), 'Tasks Currently Past Due' (12604), 'Assets Needing Update' (0), and 'Number of High Risk Assets' (3). The version number 'Version 1.3.7 December 22, 2011' is visible at the bottom.

Task Name	Task Due Date	Task Status
Check and record chlorine r...	3/9/2012	TODAY'S TASK
Check and record water lev...	3/9/2012	TODAY'S TASK
Check instrumentation for p...	3/9/2012	TODAY'S TASK
Check water meter reading...	3/9/2012	TODAY'S TASK
Complete a daily security ch...	3/9/2012	TODAY'S TASK
Inspect heater operation d...	3/9/2012	TODAY'S TASK
Inspect well pumps, motors...	3/9/2012	TODAY'S TASK
Investigate customer compl...	3/9/2012	TODAY'S TASK
Check and record chlorine r...	3/8/2012	PAST DUE TASK
Check and record water lev...	3/8/2012	PAST DUE TASK
Check instrumentation for p...	3/8/2012	PAST DUE TASK
Check water meter reading...	3/8/2012	PAST DUE TASK

# Navigate Through CUPSS

## Navigation Area

- Includes the administration menu and the CUPSS module buttons

## Activity Windows

- Where you will view, edit and manipulate data

Check Up Program for Small Systems (CUPSS)

Check Up Program for Small Systems

My Home My Inventory My O & M My Finances My Check Up My CUPSS Plan

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

Do Some Training

Enter a New Task or Work Order

Create or Update My Schematic

Search Asset and Maintenance

Create or Update My Inventory

Enter My Finances

Print My Check Up Reports

Work on My CUPSS Plan

My Calendar

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

My Messages and Alerts

Popup Messages Are On. Click To Turn Off.

Reminder - Today's Tasks	8
Tasks Currently Past Due	12604
Assets Needing Update	0
Number of High Risk Assets	3

Version 1.3.7 December 22, 2011

# Navigation Area

## Administration Menu



## CUPSS Module Buttons





# Activity Windows

Main Window

My Calendar Window

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

- [Do Some Training](#)
- [Enter a New Task or Work Order](#)
- [Create or Update My Schematic](#)
- [Search Asset and Maintenance](#)
- [Create or Update My Inventory](#)
- [Enter My Finances](#)
- [Print My Check Up Reports](#)
- [Work on My CUPSS Plan](#)

Version 1.3.7 December 22, 2011

**My Calendar**

March, 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**My Messages and Alerts**

Popup Messages Are On. Click To Turn Off.

Reminder - Today's Tasks	8
Tasks Currently Past Due	12604
Assets Needing Update	0
Number of High Risk Assets	3

My Messages and Alerts Window



# Status Tables

## Today's Tasks

Right Click on Item to View

Task Name
Check and record chlorine residual at the point of application.
Check and record chlorine residual in the distribution system.
Check and record fluoride concentration in the distribution system.
Check and record water levels in storage tanks.
Check chemical solution tanks and record amounts used.
Check instrumentation for proper signal input/output. (Chlorine residual and Fluoride)
Check water meter readings and record water production.
Complete a daily security check. (1.Check all windows, doors, hatches, seals and vents f...
Inspect booster pump stations.
Inspect chemical feed pumps.
Inspect heater operation during winter months.

Close

## Tasks Currently Past Due

Right Click on Item to View

Task Name	Task Due Date
Check and record chlorine residual at the po...	2/27/2008
Check and record chlorine residual in the dis...	2/27/2008
Check and record fluoride concentration in t...	2/27/2008
Check and record water levels in storage	2/27/2008
Check chemical solution tanks and record	2/27/2008
Check instrumentation for proper signal inp...	2/27/2008
Check water meter readings and record wat...	2/27/2008
Complete a daily security check. (1.Check all...	2/27/2008
Inspect booster pump stations.	2/27/2008
Inspect chemical feed pumps.	2/27/2008
Inspect heater operation during winter mon...	2/27/2008

Close

## Assets Needing Update

Right Click on Item to View

Asset Name
------------

Close

## Number of High Risk Assets

Right Click on Item to View

Asset Name
Pump 1

Close



# HELP

## **Benefits to My Utility**

CUPSS provides step by step instructions on how to use every aspect of the application.

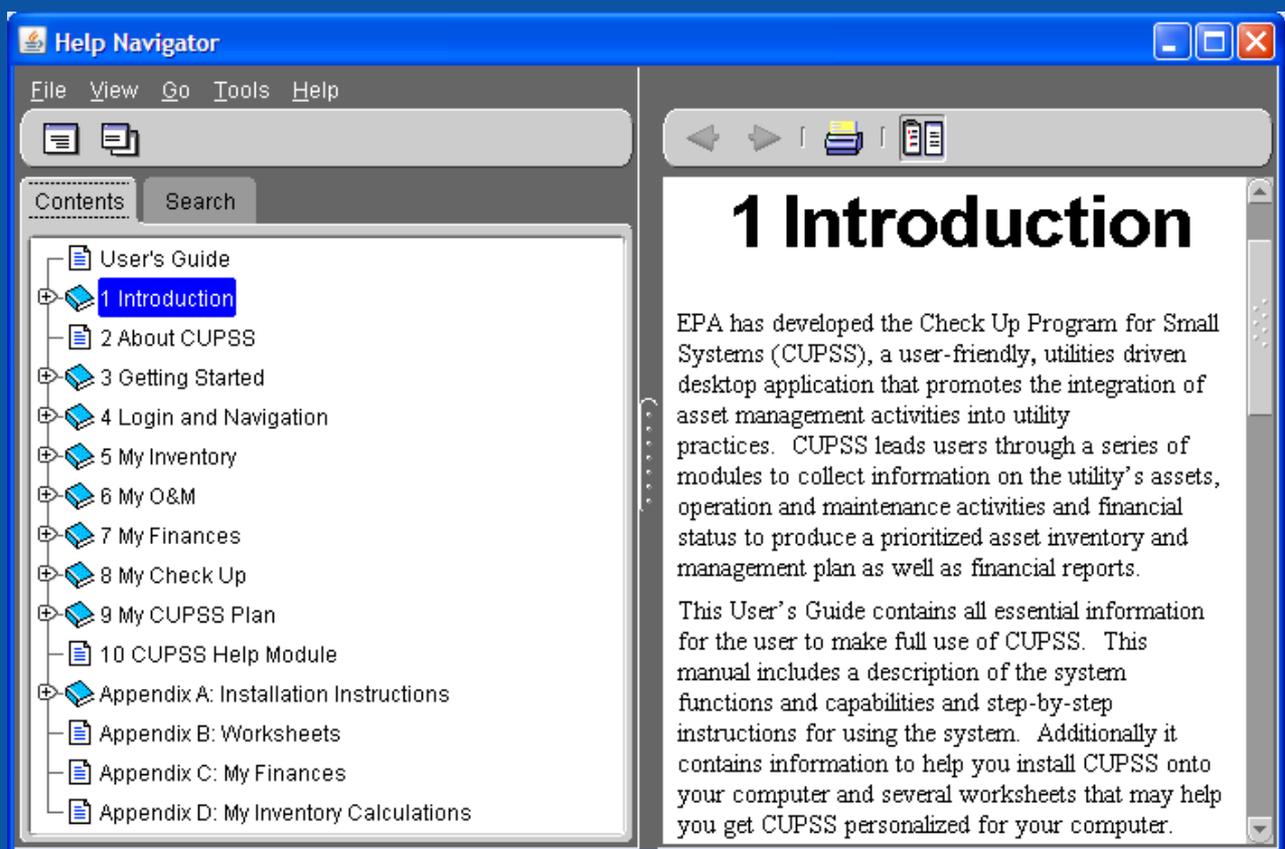
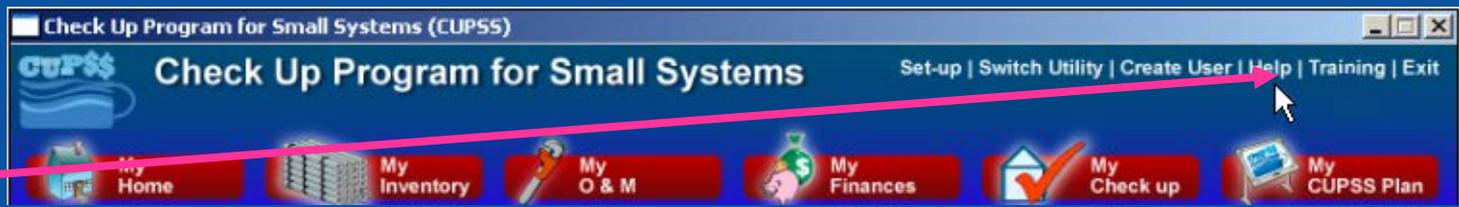
# Help

In the Help module, we will be discussing:

- How to view the contents within the electronic CUPSS User's Guide
- How to search the CUPSS User's Guide



# CUPSS Help Module





# Browse Help

The image shows two windows from a help application. The left window, titled "Help Navigator", has a menu bar with "File", "View", and "Help". Below the menu bar are icons for a document and a folder. There are two tabs: "Contents" (selected) and "Search". The "Contents" tab shows a tree view of the help topics. The right window, titled "Help Topic Window", has a menu bar with "File", "Go", and "Tools". Below the menu bar are icons for a document, back, forward, print, and a list. The main content area of this window displays the title "1 Introduction" in a large, bold font, followed by two paragraphs of text.

**Help Navigator**

File View Help

Contents Search

- User's Guide
- 1 Introduction**
- 2 About CUPSS
- 3 Getting Started
- 4 Login and Navigation
- 5 My Inventory
- 6 My O&M
- 7 My Finances
- 8 My Check Up
- 9 My CUPSS Plan
- 10 CUPSS Help Module
- Appendix A: Installation Instructions
- Appendix B: Worksheets
- Appendix C: My Finances

**Help Topic Window**

File Go Tools

## 1 Introduction

EPA has developed the Check Up Program for Small Systems (CUPSS), a user-friendly, utilities driven desktop application that promotes the integration of asset management activities into utility practices. CUPSS leads users through a series of modules to collect information on the utility's assets, operation and maintenance activities and financial status to produce a prioritized asset inventory and management plan as well as financial reports.

This User's Guide contains all essential information for the user to make full use of CUPSS. This manual includes a description of the system functions and capabilities and step-by-step instructions for using the system. Additionally it contains information to help you install CUPSS onto your computer and several worksheets that may help you get CUPSS personalized for your computer.

# Search Help

**Help Navigator**

File View Go Tools Help

Contents Search

Type the words for which you want to search

financial Search

Case-sensitive

Search for

All of these words

Any of these words

This Boolean expression

Results: Select a topic and click Open

Rank	Topic Title	Source
8	My Check Up	
10	CUPSS Help Module	
7	My Finances	
1	Introduction	
4	Login and Navigation	
9	My CUPSS Plan	
3	Getting Started	
5	My Inventory	

Found 8 topics Open

**Help Navigator**

File View Help

Contents Search

- User's Guide
- 1 Introduction
- 2 About CUPSS
- 3 Getting Started
- 4 Login and Navigation
- 5 My Inventory
- 6 My OAM
- 7 My Finances
- 8 My Check Up
- 9 My CUPSS Plan
- 10 CUPSS Help Module
- Appendix A: Installation Instructions
- Appendix B: Worksheets
- Appendix C: My Finances

**Help Topic Window**

File Go Tools

## 1 Introduction

EPA has developed the Check Up Program for Small Systems (CUPSS), a user-friendly, utilities driven desktop application that promotes the integration of asset management activities into utility practices. CUPSS leads users through a series of modules to collect information on the utility's assets, operation and maintenance activities and financial status to produce a prioritized asset inventory and management plan as well as financial reports.

This User's Guide contains all essential information for the user to make full use of CUPSS. This manual includes a description of the system functions and capabilities and step-by-step instructions for using the system. Additionally it contains information to help you install CUPSS onto your computer and several worksheets that may help you get CUPSS personalized for your computer.

# Search Results

Your Search Results can be displayed in the main window (as shown here) or in a separate window

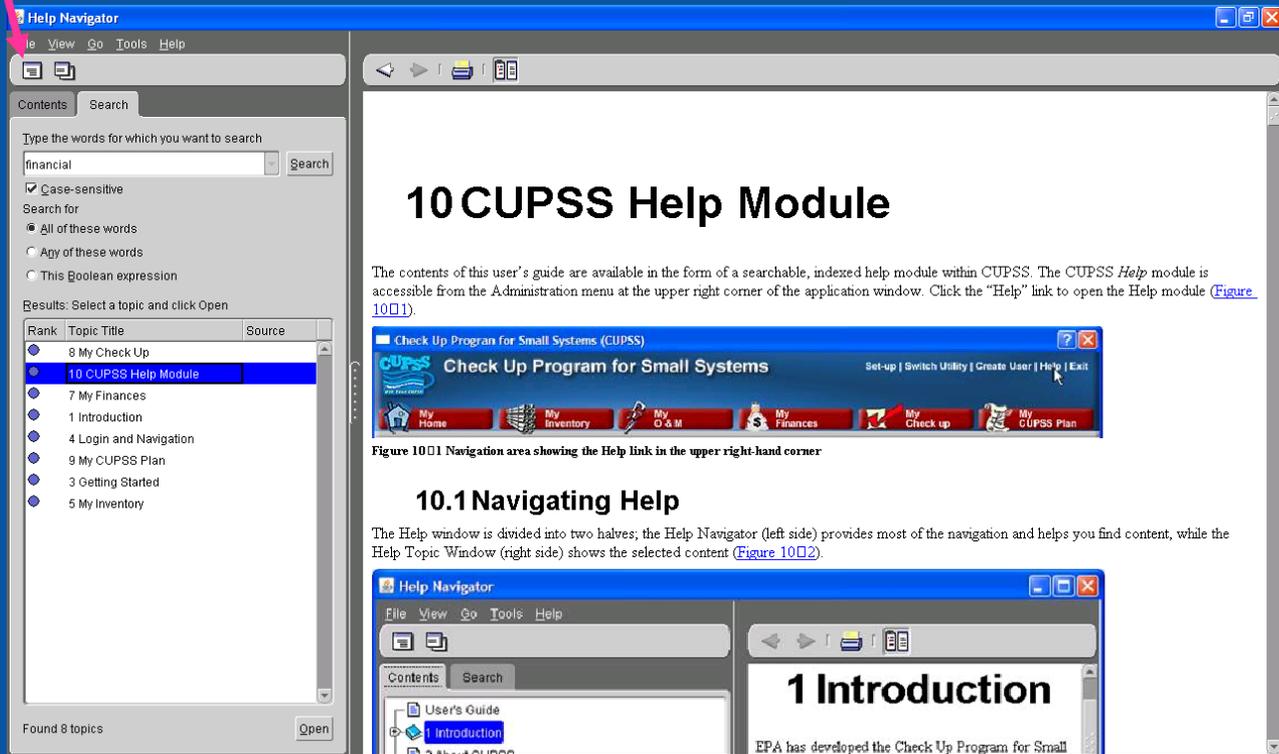


Figure 1001 Navigation area showing the Help link in the upper right-hand corner



# Poll Question

In what chapters is the term 'financial' located?

- A. Getting Started
- B. Login and Navigation
- C. My Finances
- D. All of the above



# CUPSS Example

## Help Exercise



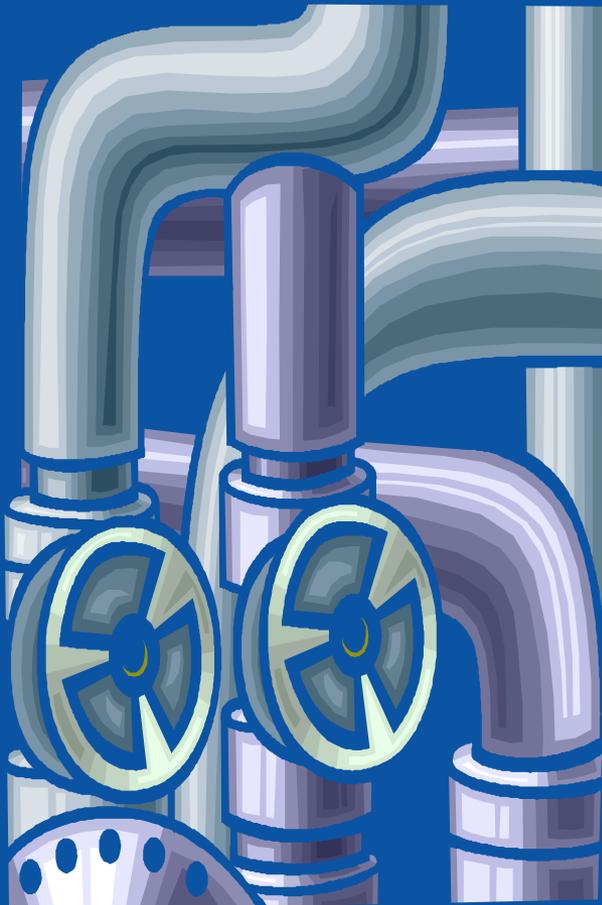
# Q&A on Login/Navigation and Help



# MY INVENTORY

## Benefits to My Utility

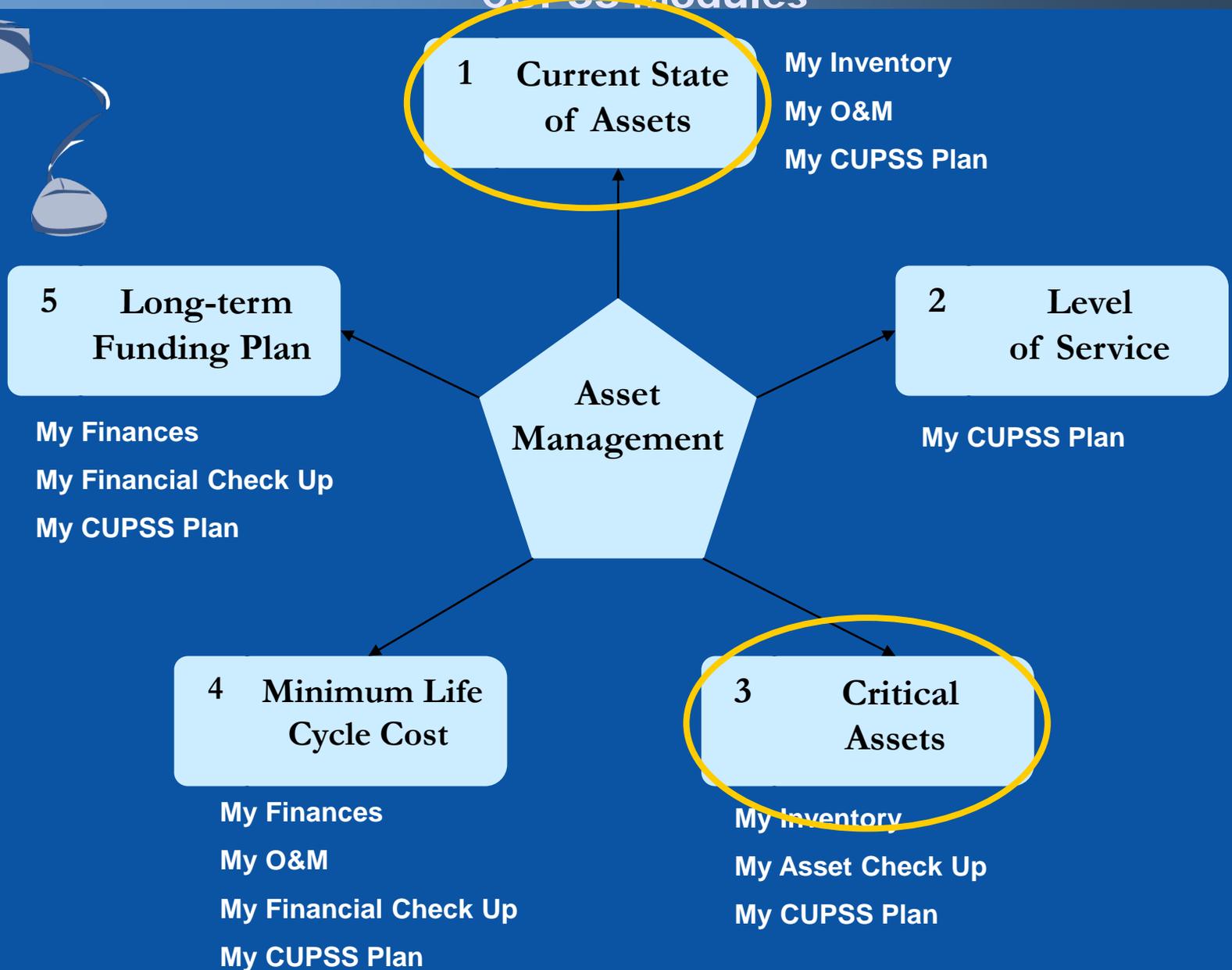
CUPSS can be used to create an inventory of a utility's assets, identify critical assets for capital improvement planning and create a schematic to present an overview to town officials.





# Asset Management Core Questions

## CUPSS Modules

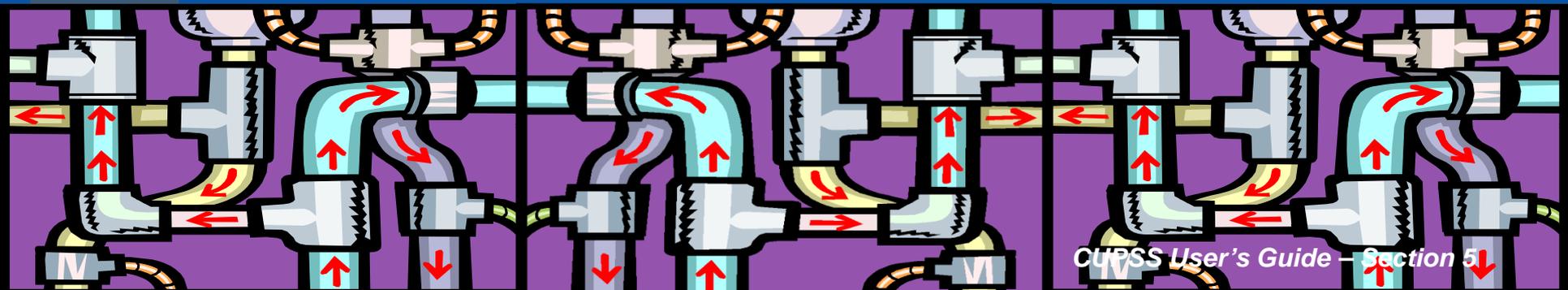




# My Inventory

In the My Inventory module, we will be discussing:

- How to track your assets through an inventory list and an interactive schematic tool
- How to plan your capital improvement projects





# Why Manage Your Inventory?

- Identify what assets you own and their purpose
- Map out what you have and what other assets are associated with them
- Determine when your assets will need to be replaced





# Think about the Asset Management Plan

Tracking your assets will help you determine which assets are critical to the utility. Your asset management plan can keep a record of all assets and the consequence of their failure.

# Navigate to My Inventory



**Check Up Program for Small Systems (CUPSS)**

Check Up Program for Small Systems    Set-up | Switch Utility | Create User | Help | Training | Exit

My Home    **My Inventory**    My O & M    My Finances    My Check Up    My CUPSS Plan

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

- Do Some Training
- Enter a New Task or Work Order
- Create or Update My Schematic
- Search Asset and Maintenance
- Create or Update My Inventory**
- Enter My Finances
- Print My Check Up Reports
- Work on My CUPSS Plan

Version 1.3.7 December 22, 2011

**My Calendar**

March 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**My Messages and Alerts**

Popup Messages Are On. Click To Turn Off.

Reminder - Today's Tasks	8
Tasks Currently Past Due	12604
Assets Needing Update	0
Number of High Risk Assets	3



# CUPSS Example

## My Inventory Exercise





# My Inventory Home

Check Up Program for Small Systems (CUPSS)
\_ □ ×

**Check Up Program for Small Systems**
Set-up | Switch Utility | Create User | Help | Training | Exit

My Home
 

 My Inventory
 

 My O & M
 

 My Finances
 

 My Check Up
 

 My CUPSS Plan

### Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data. ?

[Create or Edit My Schematic](#)     [View My Inventory List](#)     [Search](#)  
[Create or Edit My Inventory List](#)     [View My Capital Improvement Projects](#)     [Export to KMZ](#) ?  
[Download Template for Import](#)     [Import Assets for My Inventory List](#)

### Beauty View Acres Subdivision - DW Schematic

### Asset Risk Matrix

[Click to Expand](#)

### Inventoried Asset List

- [-] Source
  - Well#1
  - pump
  - Wellhouse
  - well property
- [-] Pumping Facility
  - Main valve
  - Security
  - Chlorinator
- [-] Treatment
  - Chlorine testing
- [-] Storage
  - Storage Tank
- [-] Distribution
  - Water Production Meter
  - Tank
  - Distribution



# Create or Edit My Schematic

**Beauty View Acres Subdivision - DW Asset Inventory**

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

<a href="#">Create or Edit My Schematic</a>	<a href="#">View My Inventory List</a>	<a href="#">Search</a>
<a href="#">Create or Edit My Inventory List</a>	<a href="#">View My Capital Improvement Projects</a>	<a href="#">Export to KMZ</a>
<a href="#">Download Template for Import</a>	<a href="#">Import Assets for My Inventory List</a>	

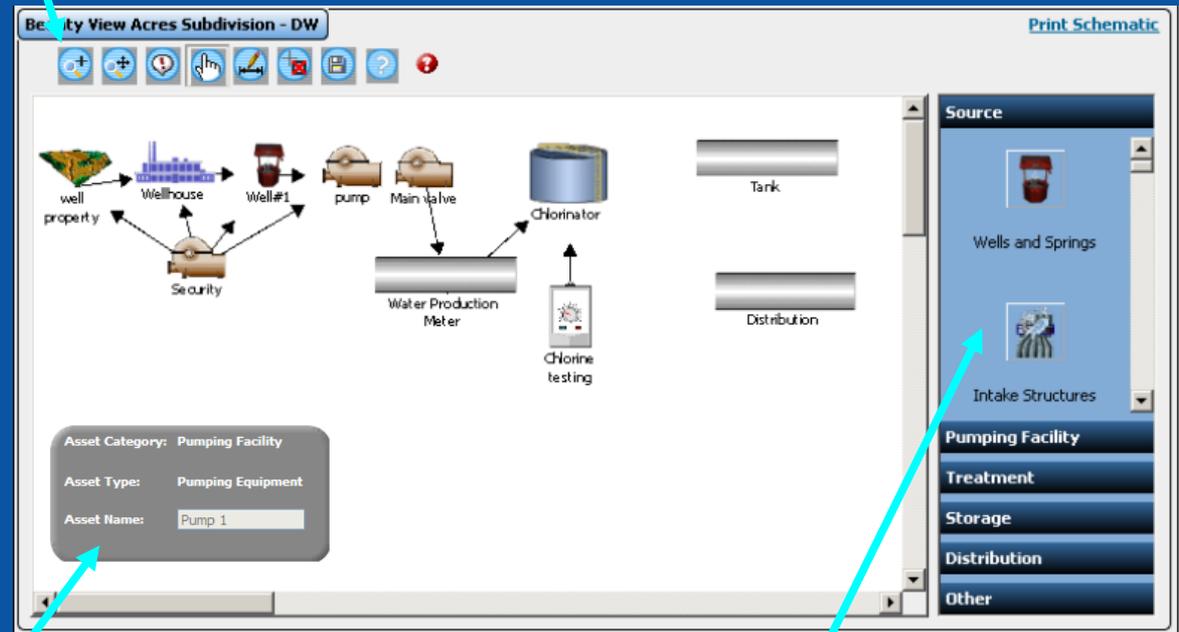
**Benefits to My Utility**

CUPSS includes a schematic of the utility in the My CUPSS Asset Inventory Report and My CUPSS Asset Management Plan. The schematic can be used to provide town officials an overview of the utility.



# Create or Edit My Schematic

## Schematic Editing Buttons



Identify Asset

Asset Category Images

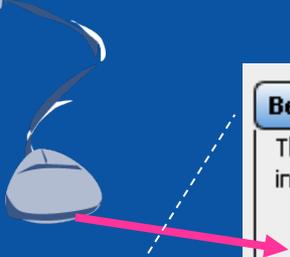


# Create or Edit My Inventory List

**Beauty View Acres Subdivision - DW Asset Inventory**

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

<a href="#">Create or Edit My Schematic</a>	<a href="#">View My Inventory List</a>	<a href="#">Search</a>
<a href="#">Create or Edit My Inventory List</a>	<a href="#">View My Capital Improvement Projects</a>	<a href="#">Export to KMZ</a>
<a href="#">Download Template for Import</a>	<a href="#">Import Assets for My Inventory List</a>	



The screenshot shows the CUPSS software interface. At the top, there's a navigation bar with 'My Home', 'My Inventory', 'My D & M', 'My Finances', 'My Check Up', and 'My CUPSS Plan'. The main content area is titled 'Beauty View Acres Subdivision - DW Asset Inventory' and contains the same text and links as the screenshot above. Below this, there's a 'Beauty View Acres Subdivision - DW Schematic' section with a diagram of water infrastructure components like well property, wellhouse, well, pump, main valve, water products on meter, chlorinator, tank, storage tank, and distribution. To the right, there's an 'Asset Risk Matrix' and an 'Inventoried Asset List' showing a tree view of asset categories such as Source, Pumping Facility, Treatment, Storage, and Distribution.

**Benefits to My Utility**

CUPSS includes your asset information in the My CUPSS Asset Management Plan to help you discuss the critical assets and develop the capital improvement plan.

# Asset Inventory

Basic Information

Status and Condition

Cost and Maintenance

Manufacturer and Supplier

**CUPSS Check Up Program for Small Systems** Set-up | Switch Utility | Create User | Help | Training |

My Home My Inventory My O & M My Finances My Check Up My CUPSS Pl

**Beauty View Acres Subdivision - DW** [Print Blank Worksheet](#)

The asset inventory form allows you to enter information about your assets. This information will then be used in several of the CUPSS reports and to generate your prioritized asset list.  
(\*) Indicates required fields

**Basic Information**

\* Asset Name  Select Associated Asset   
\* Location  Select Associated Location  [Add]  
\* Asset Category  \* Asset Type   
Notes

**Status and Condition - Required to Calculate Priority**

\* Condition  \* CoF   
\* Redundancy  Can this asset be repaired?  Yes  No  
\* Asset Status  Can this asset be rehabilitated?  Yes  No  
Select Asset Replaced  Show asset in the schematic?  Yes  No

**Cost and Maintenance**

\* Installation Date  Original Cost   
\* Expected Useful Life  \* Replacement Cost   
Routine Maintenance Cost  Select Freque   
 Maintained According to Factory Recommendation [Create a task](#)

**Manufacturer and Supplier - Optional**

Model Number   
Supplier  Manufacturer   
Address   
City, State, Zip  Select state   
Phone, Fax

[Save and Add Another Asset](#) [Save](#)

**Asset Risk Matrix**

**Inventoried Asset List**

- Source
  - Well#1
  - pump
  - Wellhouse
  - well property
- Pumping Facility
  - Main valve
  - Security
  - Chlorinator
- Treatment
  - Chlorine testing
- Storage
  - Storage Tank
- Distribution
  - Water Production Meter
  - Tank
  - Distribution



# Print Blank Worksheet

**CUPSS Check Up Program for Small Systems** Set-up | Switch Utility | Create User | Help | Training |

[My Home](#) [My Inventory](#) [My O & M](#) [My Finances](#) [My Check Up](#) [My CUPSS Pl](#)

**Ready View ARCS Subdivision - CA** [Print Blank Worksheet](#)

The asset inventory form allows you to enter information about your assets. This information will then be used in several of the CUPSS reports and to generate your prioritized asset list.  
**(\*) Indicates required fields**

**Basic Information**

\* Asset Name  Select Associated Asset   
\* Location  Select Associated Location  [Add]  
\* Asset Category  Select Category  \* Asset Type  Select Asset Type   
Notes

**Status and Condition - Required to Calculate Priority**

\* Condition  Select Condition Rating  \* CoF  Select CoF Rating   
\* Redundancy  Select Redundancy  Can this asset be repaired?  Yes  No  
\* Asset Status  Select Status  Can this asset be rehabilitated?  Yes  No  
Select Asset Replaced  Select Asset Being Replaced  Show asset in the schematic?  Yes  No

**Cost and Maintenance**

\* Installation Date  Original Cost   
\* Expected Useful Life  \* Replacement Cost   
Routine Maintenance Cost  Select Freque   
 Maintained According to Factory Recommendation  [Create a task](#)

**Manufacturer and Supplier - Optional**

Model Number   
Supplier  Select Existing Supplier  Manufacturer  Select Existing Manufact.   
Address   
City, State, Zip  Select state   
Phone, Fax

[Save and Add Another Asset](#) [Save](#)

**Asset Risk Matrix**

**Inventoried Asset List**

- Source
  - Well#1
  - pump
  - Wellhouse
  - well property
- Pumping Facility
  - Main valve
  - Security
  - Chlorinator
- Treatment
  - Chlorine testing
- Storage
  - Storage Tank
- Distribution
  - Water Production Meter
  - Tank
  - Distribution



# Blank Drinking Water Worksheet

Inventory List (Drinking Water)			
<b>Asset Name</b>	<b>Location</b>		
<b>Associated Asset</b>	<b>Associated Location</b>		
<b>Asset ID (optional)</b>	<b>Asset Size (optional)</b>		
<b>Asset Latitude (optional)</b>	<b>Asset Longitude (optional)</b>		
<b>Storage Capacity in Days (optional)</b>	<b>Linear Feet (optional)</b>		
<b>Acres of Land (optional)</b>			
<b>Asset Category</b>			
<input type="checkbox"/> Source <input type="checkbox"/> Pumping Facility <input type="checkbox"/> Treatment <input type="checkbox"/> Storage <input type="checkbox"/> Distribution <input type="checkbox"/> Other			
<b>Asset Type</b>			
<input type="checkbox"/> Wells and Springs <input type="checkbox"/> Intake Structures <input type="checkbox"/> Pumping Equipment <input type="checkbox"/> Disinfection Equipment <input type="checkbox"/> Hydropneumatic Tanks <input type="checkbox"/> Concrete & Metal Storage Tanks <input type="checkbox"/> Transmission Mains <input type="checkbox"/> Distribution/ Collection Mains	<input type="checkbox"/> Valves <input type="checkbox"/> Computer Equipment/ Software <input type="checkbox"/> Transformers/ Switchgears/ Wiring <input type="checkbox"/> Motor Controls/Drives <input type="checkbox"/> Sensors <input type="checkbox"/> Buildings <input type="checkbox"/> Service Lines	<input type="checkbox"/> Hydrants <input type="checkbox"/> Treatment Equipment <input type="checkbox"/> Lab/Monitoring Equipment <input type="checkbox"/> Tools and Shop Equipment <input type="checkbox"/> Transportation Equipment <input type="checkbox"/> Security Equipment <input type="checkbox"/> Land	<input type="checkbox"/> Galleries and Tunnels <input type="checkbox"/> Meters <input type="checkbox"/> Raw Water Reservoirs <input type="checkbox"/> Generators <input type="checkbox"/> Liquid Waste Handling & Disposal <input type="checkbox"/> Solid Waste Handling & Disposal <input type="checkbox"/> Wells <input type="checkbox"/> Springs <input type="checkbox"/> Other
<b>Asset Status</b>			
<input type="checkbox"/> Active <input type="checkbox"/> Not in Use – Abandoned <input type="checkbox"/> Not in Use – Back Up <input type="checkbox"/> Future Investment			
Can this Asset be Repaired? <input type="checkbox"/> Yes <input type="checkbox"/> No	Can this Asset be Rehabilitated? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Asset Replaced (optional):	Show asset in schematic? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>Condition</b>			
<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair (Average) <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor			
Is the asset maintained according to manufacturer's recommendations? <input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>Capacity</b>			
<input type="checkbox"/> Fullsized <input type="checkbox"/> Oversized <input type="checkbox"/> Undersized			
<b>Consequence of Failure</b>			
<input type="checkbox"/> Insignificant – CoF of 2 <input type="checkbox"/> Minor – CoF of 4 <input type="checkbox"/> Moderate – CoF of 6 <input type="checkbox"/> Major – CoF of 8 <input type="checkbox"/> Catastrophic – CoF of 10			
<b>Redundancy</b>			
<input type="checkbox"/> 0% Backup <input type="checkbox"/> 50% Backup <input type="checkbox"/> 100% Backup <input type="checkbox"/> 200% Secondary Backup			
<b>Installation Date</b>	<b>Original Cost</b>		
	\$		
<b>Expected Useful Life</b>	<b>Replacement Cost</b>		
	\$		
<b>Routine Maintenance Costs</b>	<b>Timeframe - Frequency of Routine Maintenance</b>		
\$	<input type="checkbox"/> per/day <input type="checkbox"/> per/week <input type="checkbox"/> per/month <input type="checkbox"/> per/year <input type="checkbox"/> lifetime		
<b>Optional Information</b>			
<b>Model Number</b>	<b>Manufacturer</b>		
<b>Supplier Name</b>	<b>Address</b>		
<b>City, State, Zip</b>	<b>Phone Number</b>		
<b>Fax Number</b>	<b>Notes</b>		



# Blank Wastewater Worksheet

Inventory List (Wastewater)	
<b>Asset Name</b>	<b>Location</b>
<b>Associated Asset</b>	<b>Associated Location</b>
<b>Asset ID (optional)</b>	<b>Asset Size (optional)</b>
<b>Asset Latitude (optional)</b>	<b>Asset Longitude (optional)</b>
<b>Storage Capacity in Days (optional)</b>	<b>Linear Feet (optional)</b>
<b>Acres of Land (optional)</b>	
<b>Asset Category</b>	
<input type="checkbox"/> Pumping Facility <input type="checkbox"/> Treatment <input type="checkbox"/> Storage <input type="checkbox"/> Collection <input type="checkbox"/> Other	
<b>Asset Type</b>	
<input type="checkbox"/> Pumping Equipment <input type="checkbox"/> Disinfection Equipment <input type="checkbox"/> Concrete & Metal Storage Tanks <input type="checkbox"/> Transmission Mains <input type="checkbox"/> Valves <input type="checkbox"/> Computer Equipment/ Software	<input type="checkbox"/> Transformers/ Switchgears/ Wiring <input type="checkbox"/> Motor Controls/Drives <input type="checkbox"/> Sensors <input type="checkbox"/> Buildings <input type="checkbox"/> Service Lines <input type="checkbox"/> Treatment Equipment <input type="checkbox"/> Distribution/ Collection Mains
<input type="checkbox"/> Lab/ Monitoring Equipment <input type="checkbox"/> Tools and Shop Equipment <input type="checkbox"/> Transportation Equipment <input type="checkbox"/> Security Equipment <input type="checkbox"/> Land <input type="checkbox"/> Sewers <input type="checkbox"/> Pressure Pipework	<input type="checkbox"/> Galleries and Tunnels <input type="checkbox"/> Meters <input type="checkbox"/> Generators <input type="checkbox"/> Liquid Waste Handling & Disposal <input type="checkbox"/> Solid Waste Handling & Disposal <input type="checkbox"/> Digester <input type="checkbox"/> Other
<b>Asset Status</b>	
<input type="checkbox"/> Active <input type="checkbox"/> Not in Use – Abandoned <input type="checkbox"/> Not in Use – Back Up <input type="checkbox"/> Future Investment	
Can this Asset be Repaired? <input type="checkbox"/> Yes <input type="checkbox"/> No	Can this Asset be Rehabilitated? <input type="checkbox"/> Yes <input type="checkbox"/> No
Asset Replaced (optional):	Show asset in schematic? <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Condition</b>	
<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair (Average) <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor	
Is the asset maintained according to manufacturer's recommendations? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Capacity</b>	
<input type="checkbox"/> Fullsized <input type="checkbox"/> Oversized <input type="checkbox"/> Undersized	
<b>Consequence of Failure</b>	
<input type="checkbox"/> Insignificant – CoF of 2 <input type="checkbox"/> Minor – CoF of 4 <input type="checkbox"/> Moderate – CoF of 6 <input type="checkbox"/> Major – CoF of 8 <input type="checkbox"/> Catastrophic – CoF of 10	
<b>Redundancy</b>	
<input type="checkbox"/> 0% Backup <input type="checkbox"/> 50% Backup <input type="checkbox"/> 100% Backup <input type="checkbox"/> 200% Secondary Backup	
<b>Installation Date</b>	<b>Original Cost</b>
	\$
<b>Expected Useful Life</b>	<b>Replacement Cost</b>
	\$
<b>Routine Maintenance Costs</b>	<b>Timeframe - Frequency of Routine Maintenance</b>
\$	<input type="checkbox"/> per/day <input type="checkbox"/> per/week <input type="checkbox"/> per/month <input type="checkbox"/> per/year <input type="checkbox"/> lifetime
<b>Optional Information</b>	
<b>Model Number</b>	<b>Manufacturer</b>
<b>Supplier Name</b>	<b>Address</b>
<b>City, State, Zip</b>	<b>Phone Number</b>
<b>Fax Number</b>	<b>Notes</b>

# Import Assets for My Inventory List

## Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#)

[View My Inventory List](#)

[Search](#)

[Create or Edit My Inventory List](#)

[View My Capital Improvement Projects](#)

[Export to KMZ](#)

[Download Template for Import](#)

[Import Assets for My Inventory List](#)

Check Up Program for Small Systems (CUPSS)

Check Up Program for Small Systems

Set-up | Shut-Down | Create User | Help | Training | Exit

My Home | My Inventory | My D & M | My Finances | My Check Up | My CUPSS Plan

Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#) | [View My Inventory List](#) | [Search](#)

[Create or Edit My Inventory List](#) | [View My Capital Improvement Projects](#) | [Export to KMZ](#)

[Download Template for Import](#) | [Import Assets for My Inventory List](#)

Beauty View Acres Subdivision - DW Schematic

Asset Risk Matrix

Inventoried Asset List

- Source
  - Well
  - Pump
  - Wellhouse
  - well property
- Pumping Facility
  - Main valve
  - Security
  - Chlorinator
- Treatment
  - Chlorine testing
- Storage
  - Storage Tank
- Distribution
  - Water Production Meter
  - Tank
  - Distribution

## Benefits to My Utility

CUPSS includes your asset information in the My CUPSS Asset Management Plan to help you discuss the critical assets and develop the capital improvement plan.



# Download Template

A screenshot of the Microsoft Excel application window. The title bar reads 'AssetImportTemplate.xlsx - Microsoft Excel'. The ribbon is set to 'Home', showing options for Font, Alignment, Number, Styles, Cells, and Editing. The spreadsheet grid shows a header row with the following columns: 'AssetName\*', 'Location\*', 'AssetCategory\*', 'OtherAssetCategory', 'AssetType\*', 'OtherAssetType', 'AssetID', 'AssetSize', and 'Latitude'. A tooltip is displayed over the 'AssetName\*' cell in row 2, containing the text: 'The name of the technology or equipment that is used for your system to properly function.' The status bar at the bottom indicates 'Ready' and '100%' zoom.



# Import Template

**Check Up Program for Small Systems (CUPSS)**

Check Up Program for Small Systems    Set-up | Switch Utility | Create User | Help | Training | Exit

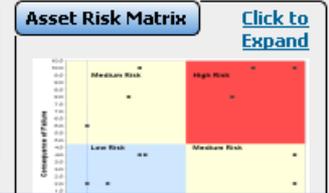
My Home    My Inventory    My O & M    My Finances    My Check Up    My CUPSS Plan

**Beauty View Acres Subdivision - DW Asset Inventory**

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#)    [View My Inventory List](#)    [Search](#)  
[Create or Edit My Inventory List](#)    [View My Capital Improvement Projects](#)    [Export to KMZ](#)  
[Download Template for Import](#)    [Import Assets for My Inventory List](#)

**Beauty View Acres Subdivision - DW Schematic**



**Select File to Import**

Look in: templates

AssetImportTemplate.xlsx

My Recent Documents  
Desktop  
My Documents  
My Computer  
My Network

File name: AssetImportTemplate.xlsx      
Files of type: \*.xls, \*.xlsx



# View My Inventory List

**Beauty View Acres Subdivision - DW Asset Inventory**

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

<a href="#">Create or Edit My Schematic</a>	<a href="#">View My Inventory List</a>	<a href="#">Search</a>
<a href="#">Create or Edit My Inventory List</a>	<a href="#">View My Capital Improvement Projects</a>	<a href="#">Export to KMZ</a>
<a href="#">Download Template for Import</a>	<a href="#">Import Assets for My Inventory List</a>	

**Benefits to My Utility**

CUPSS provides you with recommendations on repair, rehab and replace decisions using the condition, EUL, redundancy and CoF. These decisions are used in developing your capital improvement plan section of the My CUPSS Asset Management Plan.



# Asset Inventory List

## Beauty View Acres Subdivision - DW Inventory

The following is a list of assets currently in your inventory. To sort the table click on the column headings. To edit the information, right click on the selected record and click "edit row".

Priority	Asset	Category	AssetType	Condition	CoF	Redundancy	Replacement Date
1	Well#1	Source	Wells and Springs	Poor	Catastrophic	0%	2008-02-01
2	pump	Source	Pumping Equip...	Fair (Average)	Catastrophic	0%	2011-02-01
3	Security	Pumping Facility	Pumping Equip...	Good	Minor	0%	2008-02-01
4	Wellhouse	Source	Buildings	Good	Minor	0%	2008-02-01
5	Main valve	Pumping Facility	Pumping Equip...	Fair (Average)	Major	50%	2008-02-01
6	Distribution	Distribution	Distribution Pipes	Good	Major	0%	2032-02-01
7	Tank	Distribution	Distribution Pipes	Fair (Average)	Catastrophic	0%	2035-02-01
8	Chlorine testing	Treatment	Lab / Monitorin...	Excellent	Insignificant	0%	2008-02-01
9	Chlorinator	Pumping Facility	Disinfection Equ...	Fair (Average)	Insignificant	0%	2008-02-01
10	Water Producti...	Distribution	Distribution Pipes	Fair (Average)	Minor	0%	2035-02-01
11	well property	Source	Land	Excellent	Insignificant	0%	2305-02-01

<< Return

# View My Capital Improvement Projects

## Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#)

[View My Inventory List](#)

[Search](#)

[Create or Edit My Inventory List](#)

[View My Capital Improvement Projects](#)

[Export to KMZ](#)

[Download Template for Import](#)

[Import Assets for My Inventory List](#)

## Benefits to My Utility

CUPSS calculates financial reserve required for assets needing to be replaced. This will help you complete the Capital Improvement Plan section of the My CUPSS Asset Management and provide you with the necessary information in discussing your financial need with your community early to plan for these improvements.

Check Up Program for Small Systems (CUPSS)

Check Up Program for Small Systems

My Home My Inventory My D & M My Finances My Check Up My CUPSS Plan

Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#) [View My Inventory List](#) [Search](#)

[Create or Edit My Inventory List](#) [View My Capital Improvement Projects](#) [Export to KMZ](#)

[Download Template for Import](#) [Import Assets for My Inventory List](#)

Beauty View Acres Subdivision - DW Schematic

Asset Risk Matrix

Inventoried Asset List

- Source
  - Well#1 pump
  - Wellhouse well property
- Pumping Facility
  - Main valve
  - Security Chlorinator
- Treatment
  - Chlorine testing
- Storage
  - Storage Tank
- Distribution
  - Water Production Meter
  - Tank
  - Distribution



# Capital Improvement Projects

## Beauty View Acres Subdivision - DW Capital Improvements

The following is a list of Capital Improvement Projects. Double click or right click on the "Recommended Date" column to change the recommended date and year for the capital improvements. To plan a needed capital improvement, click the "Add Planned Asset" button to be directed to the "Create or Edit My Inventory List" section to enter your asset information. When entering asset information in this section, select "Future Investment" under the "Asset Status" dropdown for the asset to be added to your Capital Improvement Projects.

Priority	Asset	Category	Asset Type	Condition	CoF	Recomm. Action	Recomm. Date
1	Well#1	Source	Wells and Springs	Poor	Catastrophic	Replace	2/1/2008
2	pump	Source	Pumping Equip...	Fair (Average)	Catastrophic	Repair	2/1/2011
3	Security	Pumping Facility	Pumping Equip...	Good	Minor	Replace	2/1/2008
4	Wellhouse	Source	Buildings	Good	Minor	Replace	2/1/2008
5	Main valve	Pumping Facility	Pumping Equip...	Fair (Average)	Major	Replace	2/1/2008
6	Distribution	Distribution	Distribution Pipes	Good	Major	Repair	2/1/2032
7	Tank	Distribution	Distribution Pipes	Fair (Average)	Catastrophic	Repair	2/1/2035
8	Chlorine testing	Treatment	Lab / Monitorin...	Excellent	Insignificant	Replace	2/1/2008
9	Chlorinator	Pumping Facility	Disinfection Equ...	Fair (Average)	Insignificant	Replace	2/1/2008
10	Water Producti...	Distribution	Distribution Pipes	Fair (Average)	Minor	Repair	2/1/2035
11	well property	Source	Land	Excellent	Insignificant	Repair	2/1/2305

Save

Add Planned Asset

# Search

## Beauty View Acres Subdivision - DW Asset Inventory

The My Inventory section allows you to create/edit a schematic, create/edit an asset inventory list (by entering individual asset information or importing batch asset information), view asset information and search your data.

[Create or Edit My Schematic](#)

[View My Inventory List](#)

[Search](#)

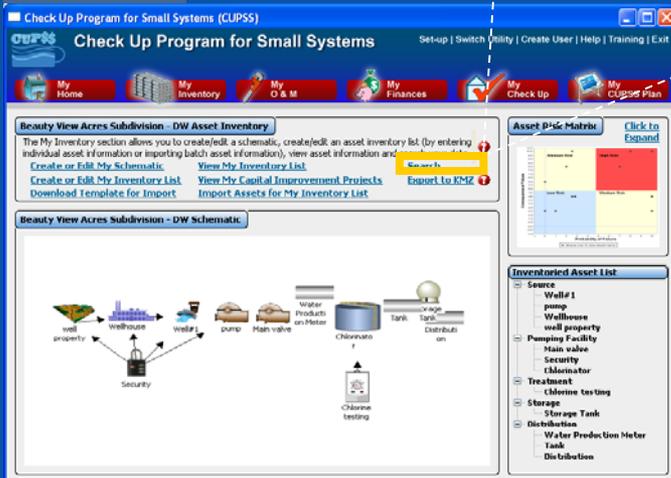
[Create or Edit My Inventory List](#)

[View My Capital Improvement Projects](#)

[Export to KMZ](#)

[Download Template for Import](#)

[Import Assets for My Inventory List](#)



## Benefits to My Utility

CUPSS allows you to export and work with your data. This way you can customize and work with all of the utility data in one location saving you time. In addition, you can use common tools like MS Excel to do additional analysis.



# Search and Report

## Beauty View Acres Subdivision - DW Search And Report

This screen allows you to query your data for a particular utility and generate an Asset Service Report or a Work Order Report. The ? next to "Select Report Type" displays the type of information included in each report.

**Search Criteria**

Select Utility: Beauty View Acres Subdivision - DW      Select Report Type: ? Asset Service Report

**Filter By: ?**

<b>Asset Category</b>	Source Pumping Facility Treatment Storage	<b>Asset Type</b>	Buildings Computer Equipment / Software Concrete & Metal Storage Tanks Disinfection Equipment	<b>Asset Status</b>	Active Not in Use - Abandoned Not in Use - Back Up Future Investment
<b>Asset</b>	Chlorinator Chlorine testing Distribution Main valve	<b>Recurrence Frequency</b>	Daily Weekly Monthly Annual	<b>Task Status</b>	Active Completed Past Due
<b>Person Assigned to Tasks</b>	Helen Howard	<b>Task Type</b>	Planned - Monitoring Planned - Routine Maintenance Planned - Repair Planned - Rehabilitation		
<b>Task Date Range</b>		<b>Keyword</b>			

<< Return

View Results

# Search Results

## Beauty View Acres Subdivision - DW Search Results

The following are the results of your search. Click the column headings to sort the information. A page of results is limited to 300 records. If necessary, click "Next" to see the additional sets of 300 records. Click "Print Report" to view the additional information associated with the tasks and/or assets.

Asset Service Report

Asset	Asset Type	Work Order/Tasks	Person	Risk	Condition	Replacement Date
Chlorine testing	Lab / Monitoring E...	None	None	Low Risk – Routin...	Excellent	2008-02-01
Well#1	Wells and Springs	None	None	High Risk – Immedi...	Poor	2009-09-01
pump	Pumping Equipment	None	None	High Risk – Immedi...	Good	2011-02-01
Water Production ...	Distribution Pipes	None	None	Low Risk – Routin...	Fair (Average)	2035-02-01
Tank	Distribution Pipes	None	None	Medium Risk – Agg...	Good	2036-02-01
Distribution	Distribution Pipes	None	None	Medium Risk – Agg...	Good	2038-02-01
Main valve	Pumping Equipment	None	None	High Risk – Immedi...	Fair (Average)	2011-02-01
Wellhouse	Buildings	None	None	Low Risk – Routin...	Good	2036-02-01
Security	Security Equipment	None	None	Medium Risk – Agg...	Good	2008-02-01
well property	Land	None	None	Medium Risk – Agg...	Poor	2267-02-01
Chlorinator	Disinfection Equip...	None	None	Medium Risk – Agg...	Fair (Average)	2008-02-01
Storage Tank	Concrete & Metal ...	None	None	Medium Risk – Agg...	Good	2055-02-01

<< Return

Print Report

**Check Up Program for Small Systems**    Setup | Switch Utility | Create User | Help | Training | Exit

My Home    My Inventory    My O & M    My Finances    My Check up    My CUPSS Plan

### Beauty View Acres Subdivision - DW Search And Report

This screen allows you to query your data for a particular utility and generate an Asset Service Report or a Work Order Report. The ? next to "Select Report Type" displays the type of information included in each report.

Select Utility: Beauty View Acres Subdivision - DW    Select Report Type: Asset Service Report

Filter By: ?

Asset Category: Source (Pumping Facility, Treatment, Storage)    Asset Type: Buildings (Computer Equipment / Software, Concrete & Metal Storage Tanks, Disinfection Equipment)    Asset Status: Active, Not in Use - Abandoned, Not in Use - Back-Up, Future Investment

Asset: Chlorine testing, Well#1, pump, Water Production Meter

Person Assigned to Tasks: Helen Howard, Robert Dunlevy    Task Type: Planned - Monitoring, Planned - Routine Maintenance, Planned - Repair, Planned - Rehabilitation    Task Status: Active, Completed, Past Due

Task Date Range: [ ] - [ ] ?

<< Return    **View Results**

# Asset Inventory

The screenshot shows the 'Check Up Program for Small Systems (CUPSS)' web application. The title bar reads 'Check Up Program for Small Systems (CUPSS)'. The main header includes the CUPSS logo and navigation links: 'Set-up | Switch Utility | Create User | Help | Training | Exit'. Below the header is a navigation bar with buttons for 'My Home', 'My Inventory', 'My O & M', 'My Finances', 'My Check Up', and 'My CUPSS Plan'. The main content area is divided into several sections:

- Beauty View Acres Subdivision - DW Asset Inventory**: A text-based section with links for 'Create or Edit My Schematic', 'View My Inventory List', 'Search', 'Create or Edit My Inventory List', 'View My Capital Improvement Projects', 'Export to KMZ', 'Download Template for Import', and 'Import Assets for My Inventory List'.
- Beauty View Acres Subdivision - DW Schematic**: A diagram showing a network of assets including 'well property', 'Wellhouse', 'Well#1', 'pump', 'Main valve', 'Water Production Meter', 'Chlorinator', 'Tank', 'Storage Tank', and 'Distribution'. A 'Security' icon is also present.
- Asset Risk Matrix**: A heatmap showing risk levels across different asset categories. A 'Click to Expand' link is provided.
- Inventoried Asset List**: A hierarchical tree view listing assets such as 'Well#1 pump', 'Wellhouse well property', 'Pumping Facility Main valve Security Chlorinator', 'Treatment Chlorine testing', 'Storage Storage Tank', and 'Distribution Water Production Meter Tank Distribution'.

**Asset Risk Matrix**

**Inventoried Asset List**

## Benefits to My Utility

CUPSS provides you with critical assets in the My CUPSS Asset Management Plan based on risk factors. So be sure to complete the asset inventory forms condition and cost section so you can get a complete picture of the health of a utility's asset to plan for the future.



# Poll Question

Are you more likely to build your inventory through the asset inventory list or asset import features?

- A. Asset Inventory list
- B. Import Asset Template
- C. Either, depending on the situation



# CUPSS Example

## Q&A on My Inventory



# MY ASSET CHECK UP REPORT



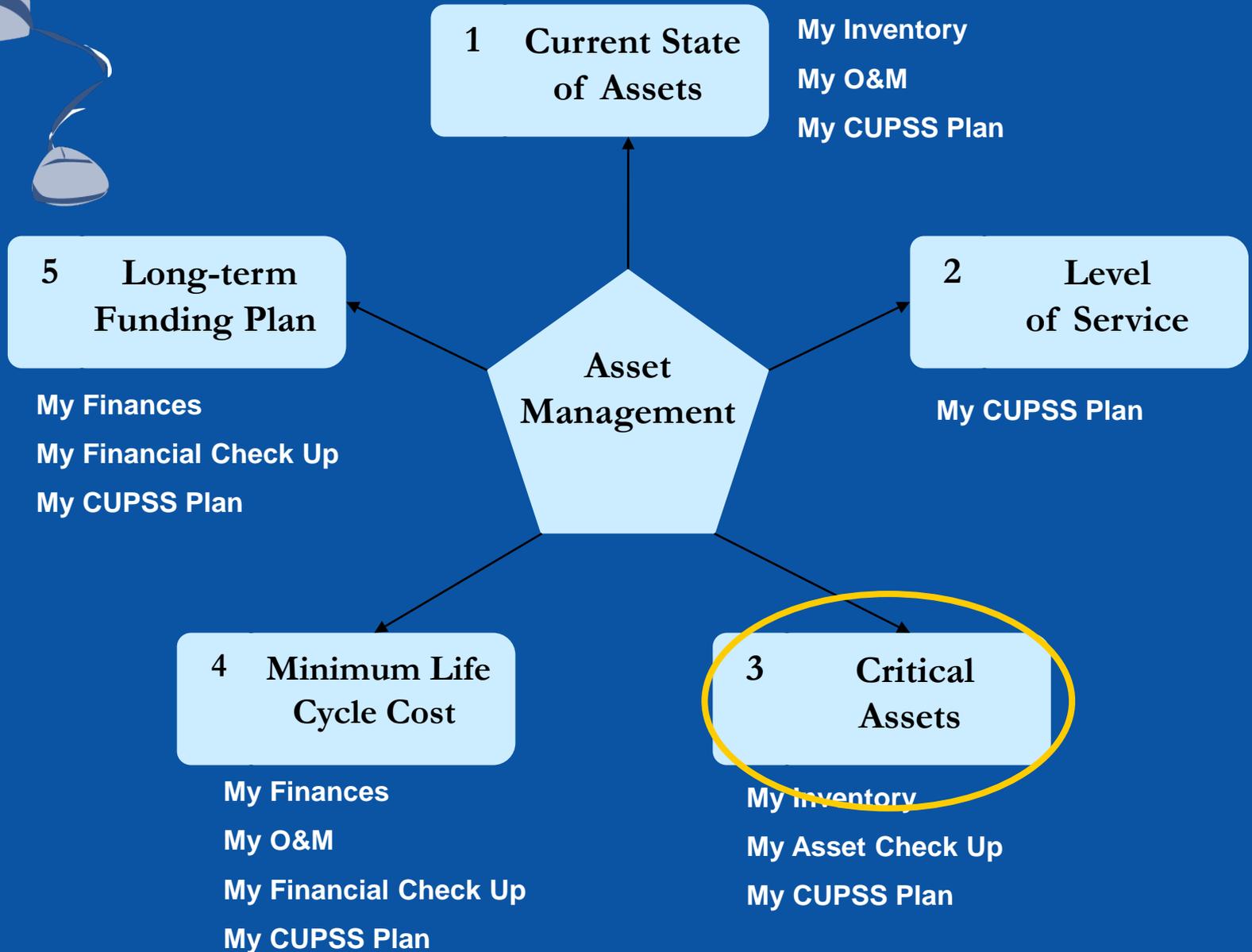
## **Benefits to My Utility**

CUPSS reports can be used to present your financial information entered in CUPSS in an organized fashion to your community decision makers and stakeholders.



# Asset Management Core Questions

## CUPSS Modules





# My Asset Check Up Report

In the My Asset Check Up Report module, we will be discussing:

- How you prioritize and identify high risk assets
- What role critical assets play in your decision making





# Think about the Asset Management Plan

Tracking your high risk assets will help you identify and prioritize these critical assets. This information will help you improve O&M practices and enhance your long-term planning efforts.

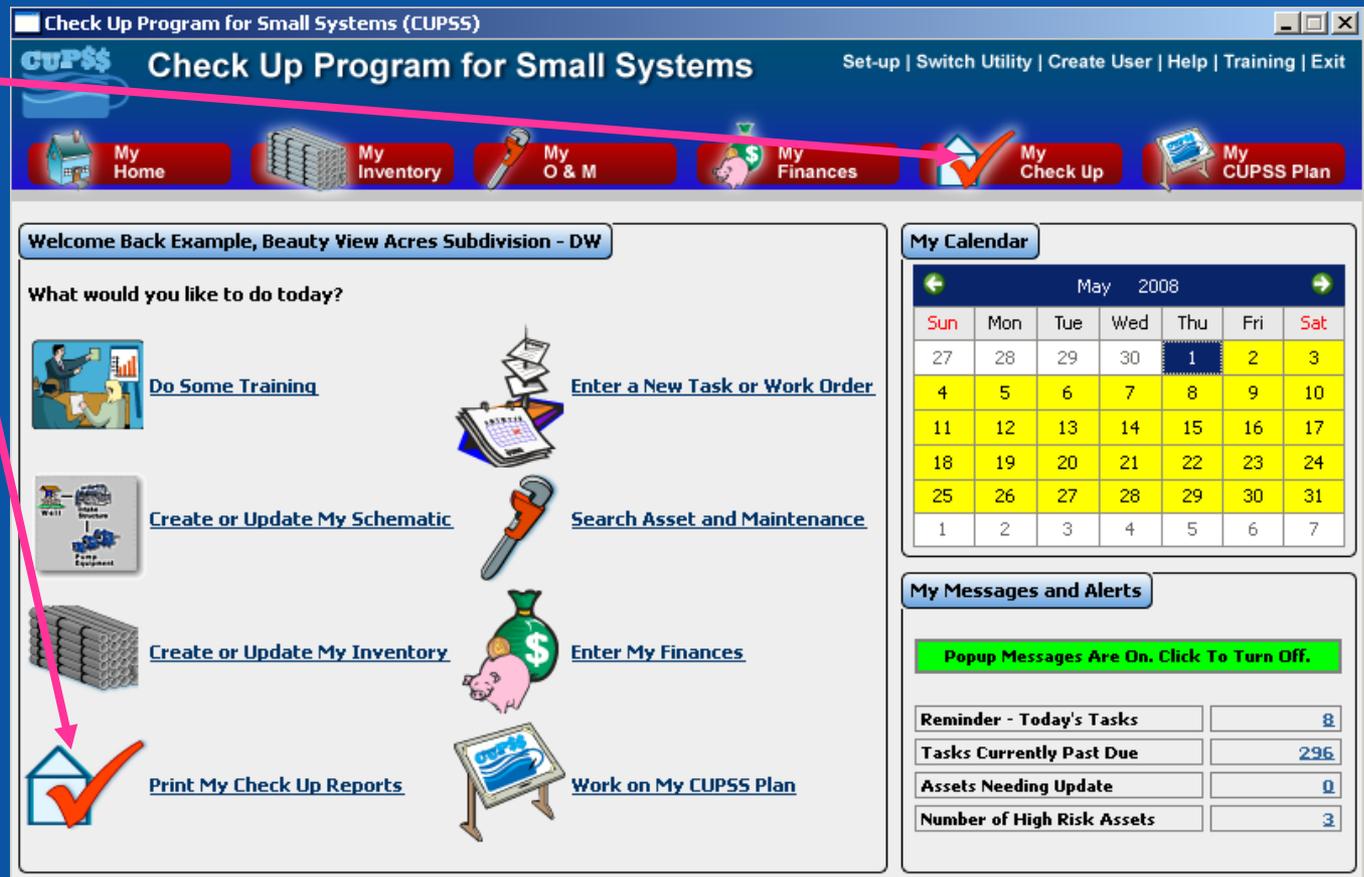


# Why Identify Critical Assets

- Understand the risk of a critical asset failing
- Prioritize maintenance work based on an asset's consequence of failure
- Identify redundancy, or lack thereof, within the utility



# Navigate to My Asset Check Up



Check Up Program for Small Systems (CUPSS)

**CUPSS Check Up Program for Small Systems** Set-up | Switch Utility | Create User | Help | Training | Exit

My Home My Inventory My O & M My Finances **My Check Up** My CUPSS Plan

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

- Do Some Training
- Enter a New Task or Work Order
- Create or Update My Schematic
- Search Asset and Maintenance
- Create or Update My Inventory
- Enter My Finances
- Print My Check Up Reports
- Work on My CUPSS Plan

**My Calendar**

May 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**My Messages and Alerts**

Popup Messages Are On. Click To Turn Off.

Reminder - Today's Tasks	8
Tasks Currently Past Due	296
Assets Needing Update	0
Number of High Risk Assets	3



# CUPSS Example

## My Asset Check Up Report Exercise



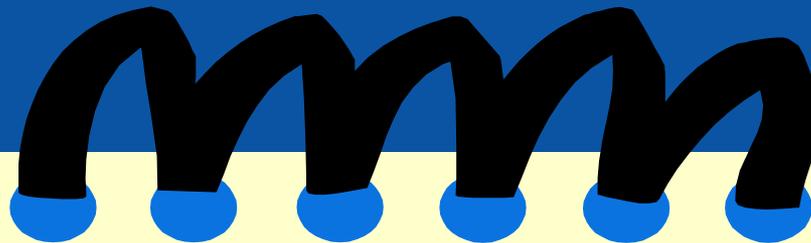


# CUPSS Example

## Q&A on My Asset Check Up Report



# Today's Agenda



- Preparing to Use CUPSS
- Session 1
  - Installation
  - Setting Up CUPSS
  - Login & Navigation
  - Help Module
  - My Inventory
  - My Asset Check Up Report
- Session 1 Your CUPSS



# Your CUPSS

## 1) My Inventory page

### **Inventory List**

- 1.1) Add two additional assets to the inventory list for 'Beauty View Acres Subdivision – DW' through the Asset Inventory form
- 1.2) Add two additional assets to the inventory list through the Asset Import template
- 1.3) Change one daily task to a weekly task

### **Schematic**

- 1.3) Delete one asset in the schematic
- 1.4) Add two new assets in the schematic
  - Link these two assets with the drawing tool

## 2) Help page

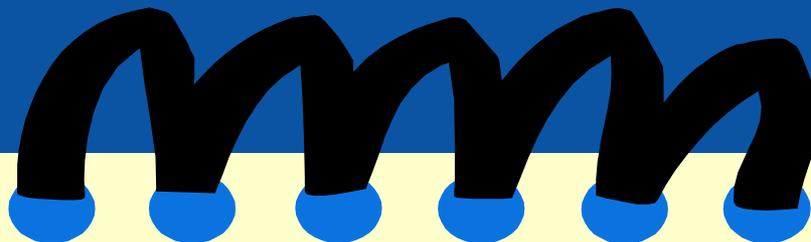
- 2.1) Search for term 'inventory'

## 3) My Asset Report page

- 3.1) Print a report showing your all assets in the drinking water example utility



# Agenda for Session 2



- Session 1 Summary
- Session 1 Your CUPSS
- Session 1 Quiz
- Session 2
  - My O&M
    - Search/Print
  - My Finances
  - My Financial Check Up Report
- Session 2 Your CUPSS



## Join Us for Session 2

Learn about entering your O&M tasks  
and finances in Session 2!

**Thursday, May 7, 2015**  
**1-3pm EDT**

[www.epa.gov/cupss](http://www.epa.gov/cupss)  
[cupss@epa.gov](mailto:cupss@epa.gov)