

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Welcome to Lesson 2 of the Check Up Program for Small Systems (CUPSS) Self-Paced Training Series! This lesson will explain how to get started using the CUPSS software.

This lesson will show you how to set-up CUPSS and the features designed to assist in learning the software. These features include: help, Beauty View Acres Example utility system and database switch.

You are likely most intrigued by what CUPSS can actually do for you. We think CUPSS will help you:

- Communicate with the decision makers in your community
- Make more informed, proactive choices
- Improve the efficiency and focus of your operations
- Maximize limited financial resources

Like anything worth doing, integrating CUPSS and asset management into your utility's culture will take time and effort. These are certainly high goals, but we think taking the simple approach used in CUPSS will result in great strides forward for your community

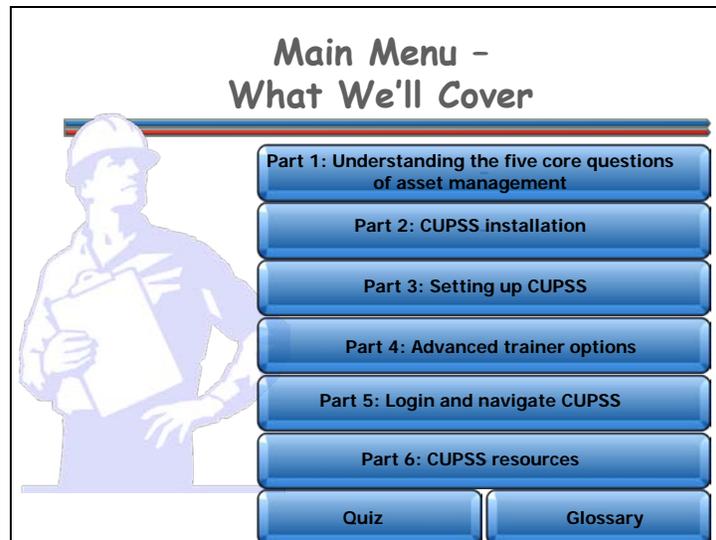
Objectives for Lesson 2



- Learn how to download and set-up CUPSS software
- Learn how to use user support functions, e.g. help.

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Lesson 2 objectives are to learn how to download and set-up CUPSS software and learn how to use user support functions, e.g. help.



Navigation: Click a button on the slide to begin a part of the lesson. You can start at the beginning or skip ahead the choice is yours. You may also choose “FAQ” to find frequently asked questions or “Glossary” to find term definitions. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer’s sound.

This lesson is designed to familiarize you with the Setting Up of CUPSS, Advanced Trainer options and CUPSS resources.

Here’s what we’ll cover in this lesson:

- Part 1: Understanding the five core questions of asset management
- Part 2: CUPSS installation
- Part 3: Setting up CUPSS
- Part 4: Advanced trainer options
- Part 5: Login and navigate CUPSS
- Part 6: CUPSS resources

What Are We Learning?

Part 1: Understanding the five core questions of asset management

Main Menu

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For Part 1 of this lesson, we want to start with the basics. The theme for Part 1 is, "What are assets and why manage them?"

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
 - Flash Training for CUPSS
 - Ongoing Support
 - Example CUPSS: Beauty View Acres

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Before we get into the nuts and bolts of how to use CUPSS, we’ll talk about how CUPSS can be used to implement a utility’s asset management process.

We’ll also talk about the many resources that EPA has developed to help you become familiar with the CUPSS software.

Benefits of Asset Management

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



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There are many benefits in implementing asset management at a drinking water or wastewater utility. Managing assets can help support budget discussions with solid facts and numbers, boost the efficiency of the utility, save staff time and keep utility customers happy by ensuring continual service at competitive prices.

Slide 7

The screenshot shows a software window titled "Asset Management Core Questions". On the left side, there is a vertical list of four blue buttons with white text, each containing a question number and text. The main content area on the right is titled "Introduction" and contains a paragraph of text followed by a list of the five core questions. At the bottom of the window, there is a "PROPERTIES" section with several options and two buttons: "Properties..." and "Edit in Engage".

Asset Management Core Questions

1. What is the Current State of Your Assets?

2. What is Your Required Sustained Level of Service (LOS)?

3. Which Assets are Critical to Sustained Performance?

4. What are Your Best Capital Improvement Project (CIP) and O&M Strategies?

Introduction

When you start thinking about asset management, there are five core questions that will help you get the ball rolling.

The five core questions of an asset management framework are:

1. What Is The Current State Of Your Assets?
2. What Is Your Required Sustained Level Of Service?
3. Which Assets Are Critical To Sustained Performance?
4. What Are Your Best "Minimum Life-Cycle-Cost" CIP And O&M Strategies?

PROPERTIES
Allow user to leave interaction:
Show 'Next Slide' Button:
Completion Button Label:

After viewing all the steps
Show upon completion
Next Slide

Properties...

Edit in Engage

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. Click on the buttons on the left side or click on the arrows at the top of the slide to navigate through the information. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

The image shows a presentation slide with a blue border and a red header bar. The header bar contains the text "Asset Management Core Questions" and three navigation icons (back, forward, search). On the left side, there is a vertical list of five blue buttons, each containing a question number and text. On the right side, there is a white box with a grey border containing the text "Introduction" and a paragraph of text. Below the paragraph, there is another paragraph of text followed by a numbered list of five questions.

Asset Management Core Questions

1. What is the Current State of Your Assets?

2. What is Your Required Sustained Level of Service (LOS)?

3. Which Assets are Critical to Sustained Performance?

4. What are Your Best Capital Improvement Project (CIP) and O&M Strategies?

5. What is Your Best Long-term Financing Strategy?

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- What Is The Current State Of Your Assets?
- What Is Your Required Sustained Level Of Service?
- Which Assets Are Critical To Sustained Performance?
- What Are Your Best "Minimum Life-Cycle-Cost" Capital Improvement Project (CIP) and Operation and Maintenance (O&M) Strategies?
- What Is Your Best Long-term Financing Strategy?

You'll soon see how these questions all relate to effective asset management!

Asset Management Core Questions

1. What is the Current State of Your Assets?

2. What is Your Required Sustained Level of Service (LOS)?

3. Which Assets are Critical to Sustained Performance?

4. What are Your Best Capital Improvement Project (CIP) and O&M Strategies?

5. What is Your Best Long-term Financing Strategy?

1. What is the Current State of Your Assets...

Asset Management Core Question
Question 1 of 5

1

What Is The Current State Of Your Assets?

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



Question 1 What Is The Current State Of Your Assets?

The first step in managing a utility's assets is knowing their current state. Because some of this information may be difficult to find, estimates can be used when necessary. Over time, as assets are replaced or rehabilitated, the utility's inventory will become more accurate.

Questions to ask:

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

Asset Management Core Questions

1. What is the Current State of Your Assets?

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4. What are Your Best Capital Improvement Project (CIP) and O&M Strategies?

5. What is Your Best Long-term Financing Strategy?

2. What is Your Required Sustained Level of Service (...)

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?



Question 2 What Is Your Required Sustained Level Of Service?

Knowing the utility's required "sustainable" level of service will help the utility implement an asset management plan and communicate to stakeholders what is being done. The required sustainable level of service is the set of features that describe the utility's short- and long-term performance standards as well as the customer's expectations.

Questions to ask in determining the utility's Level of Service (LOS):

- What do the regulators require? Find out what the utility has to provide and how.
- What are the utility's performance goals? Or what services is the utility currently providing? Find out if the services can be improved.
- What level of service do the stakeholders and customers demand or expect? Another way to ask this is 'what is the best way to meet the needs of the customers'? Find out from customers what services are most important to them.
- What are the physical capabilities of the assets? Or what else can the utility do in it's current capacity? Figure out if the utility is doing all it can do.

Asset Management Core Questions

1. What is the Current State of Your Assets?

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3. Which Assets are Critical to Sustained Performance?

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?



Question 3 Which Assets Are Critical To Sustained Performance?

Because assets fail, how you manage the consequences of failure is vital. Not every asset presents the same failure risk, or is equally critical to the drinking water or wastewater system's operations. Therefore, it is important to know which assets are required to sustain the utility's performance. Critical assets are those that you decide have a high risk of failing (like if the asset is old or in poor condition) and major consequences if they do fail (major expense, system failure, safety concerns, etc.). You can decide how critical each asset is and rank them accordingly.

Questions to ask:

- How can assets fail? Different things contribute to an asset failing. This can include: Demand exceeds design capacity (which comes from population growth) or physical deterioration from age, usage, or nature.
- How do assets fail? The type of failure depends on the type of asset: Water pipes can leak or disinfection equipment can stop working.
- What are the likelihoods (meaning the probabilities) and the consequences of asset failure? Likelihoods of failure depend on age and condition. Consequences of failure depend on how critical the asset is: Is it the Chlorinator in a small system that has no other backup? Are the customers logging more complaints than comments?
- What does it cost to repair or replace the asset? Cost depends upon if the utility has to repair, rehabilitate, or replace the asset.

- What are the other costs (such as social costs or environmental costs) that are associated with asset failure?

These are important values to know, understand and consider in any decision-making process. Running a utility is fundamentally a business operation and should be treated that way.

Asset Management Core Questions

1. What is the Current State of Your Assets?

2. What is Your Required Sustained Level of Service (LOS)?

3. Which Assets are Critical to Sustained Performance?

4. What are Your Best Capital Improvement Project (CIP) and O&M Strategies?

5. What is Your Best Long-term Financing Strategy?

4. What are Your Best Capital Improvement Project (...)

Asset Management Core Question
Question 4 of 5

4

What Are Your Best Capital Improvement Project (CIP) and O&M Strategies?

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

Question 4 What Are Your Best “Minimum Life-Cycle-Cost” Capital Improvement Project (CIP) and Operation and Maintenance (O&M) Strategies?

It is important to recognize that operations and maintenance (O&M), personnel, and the capital budget account for an estimated 85 percent of a typical system’s expenses. Asset management enables a system to determine the lowest cost options for providing the highest level of service over time. Utilities want to optimize the work O&M crews are doing, where they are doing it, and why. An asset management program helps a utility make risk-based decisions by choosing the right project, at the right time, for the right reason.

Questions to ask:

- What alternative management strategies exist? Run to failure may be a very real option for some utilities. Is it necessarily the best option?
- What strategies are the most feasible for the organization?

Asset Management Core Questions

1. What is the Current State of Your Assets?
2. What is Your Required Sustained Level of Service (LOS)?
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5. What is Your Best Long-term Financing Strategy?

5. What is Your Best Long-term Financing Strategy...

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?

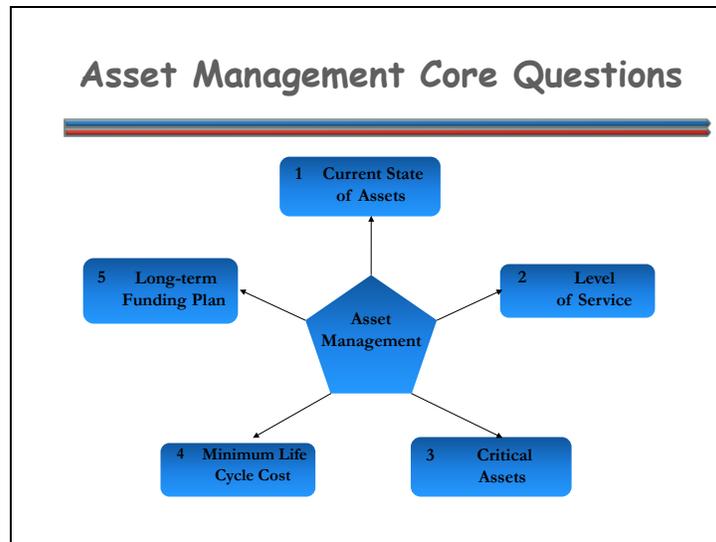


Question 5 What Is Your Best Long-term Financing Strategy?

Knowing the full economic costs of services provided is critical for making sound financial decisions and developing an effective long-term funding strategy. Having this information in an asset management plan will help tell the utility's "story." An asset management plan that refers to the utility's sustainable level of service is good for communicating this information to decision makers and customers. The utility can decide how to fund its strategies by knowing the system's financial forecast.

Questions to ask:

- 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?



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Now that you've been introduced to the core questions – here's a visual of how these questions relate to asset management. You'll soon see how these questions all relate to each other as well!

Introduction to CUPSS

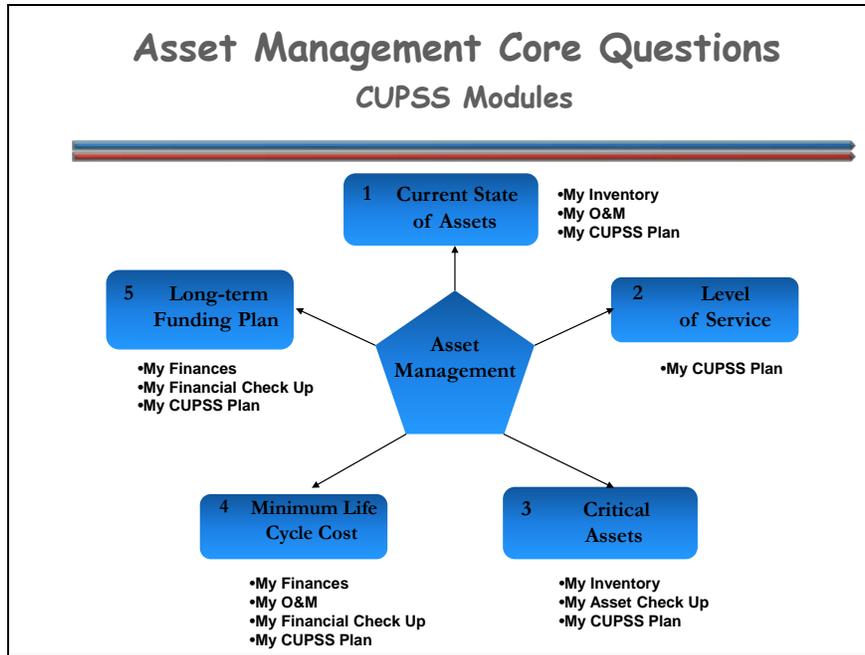


- Free Asset Management tool
- Tool developed in partnership with trainers like you
- 'Desktop software' – program that runs on your computer
- Series of modules that store information about a user's utility

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

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

CUPSS is free software that will make managing assets easier. It's a desktop system, so no internet connection is needed and the software requirements are minimal.



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Here's a diagram to show you how CUPSS relates to asset management. You can now see how all of these questions overlap with related management concepts. CUPSS helps a utility go through the objectives of each question in easy steps or modules to provide answers specific to that utility. The CUPSS application will provide this big picture vision and will ultimately aid in the preparation of an Asset Management Plan. An Asset Management Plan will provide a utility with valuable information that that can be used when making key management decisions.

The screenshot shows a presentation slide with a white background and a black border. At the top, the title "What Are We Learning?" is centered in a bold, dark grey font. Below the title is a decorative horizontal line consisting of three parallel lines in blue, red, and blue. In the center of the slide, the text "Part 2: CUPSS Installation" is displayed in a grey, italicized font. Below this, there is a rectangular text box with a black border. The text inside the box is as follows:
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.

In the bottom right corner of the slide, there is a small, blue button with the text "Main Menu" in white.

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

For Part 2 of this lesson, we want to understand how to install CUPSS. The theme for Part2 is, "CUPSS Installation".

Why Install CUPSS?



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

CUPSS User's Guide – Section 2

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Installing CUPSS is the first step in implementing asset management for a utility. This software is installed on your computer alone – none of your data will be transmitted to EPA or over the internet. Only your team members will have access to your information – and that is only if you allow them to.

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



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There are basic computer requirements needed to install the CUPSS software. These are pretty standard minimum requirements.

CUPSS Software

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



CUPSS User's Guide – Section 2

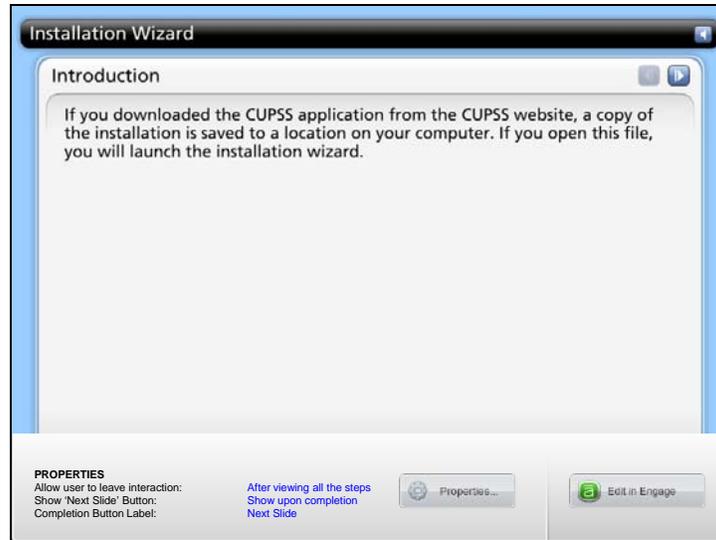
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For the purposes of this training session, we're assuming that everyone has downloaded or installed CUPSS already. So we'll only briefly go over the process of installing CUPSS.

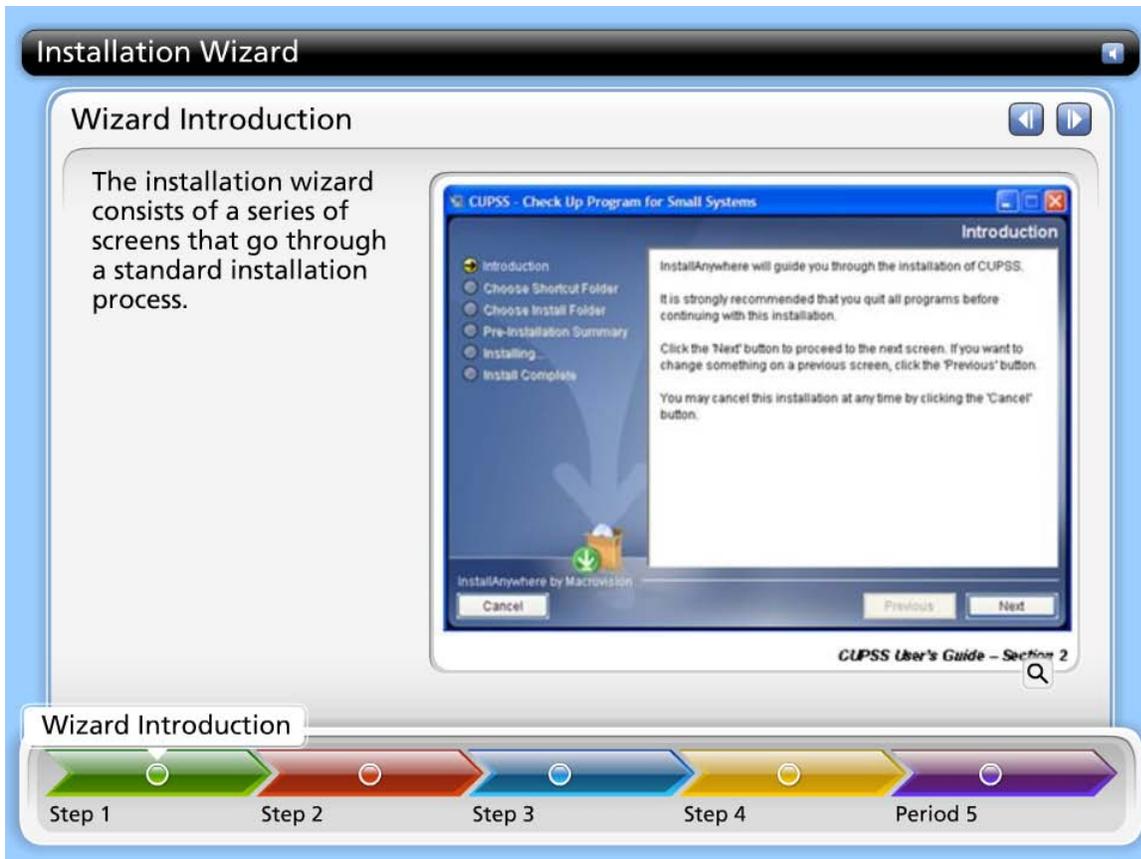
Remember that you can install the software from the CUPSS CD or from the CUPSS Website.

Any updates will not overwrite your current material.

Slide 15



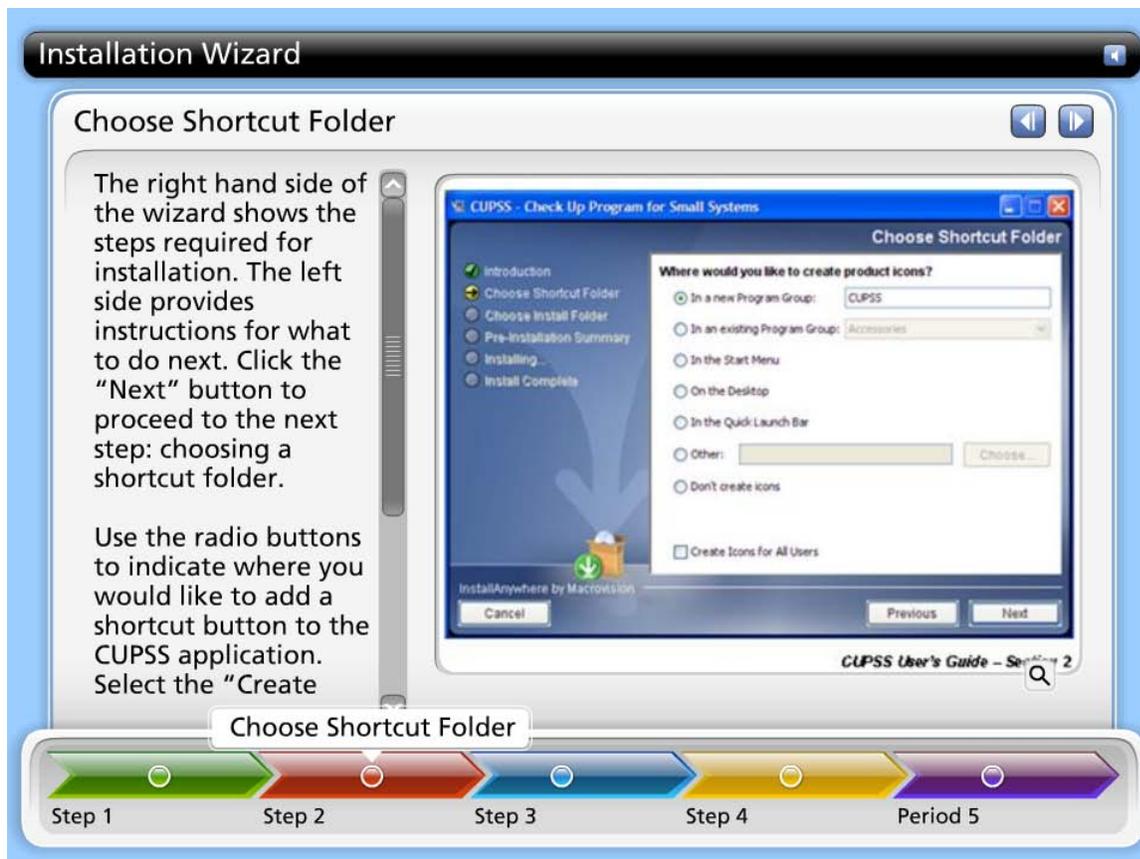
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Introduction

If you downloaded the CUPSS application from the CUPSS website, a copy of the installation is saved to a location on your computer. If you open this file, you will launch the installation wizard.

The installation wizard consists of a series of screens that go through a standard installation process.



Choose Shortcut Folder

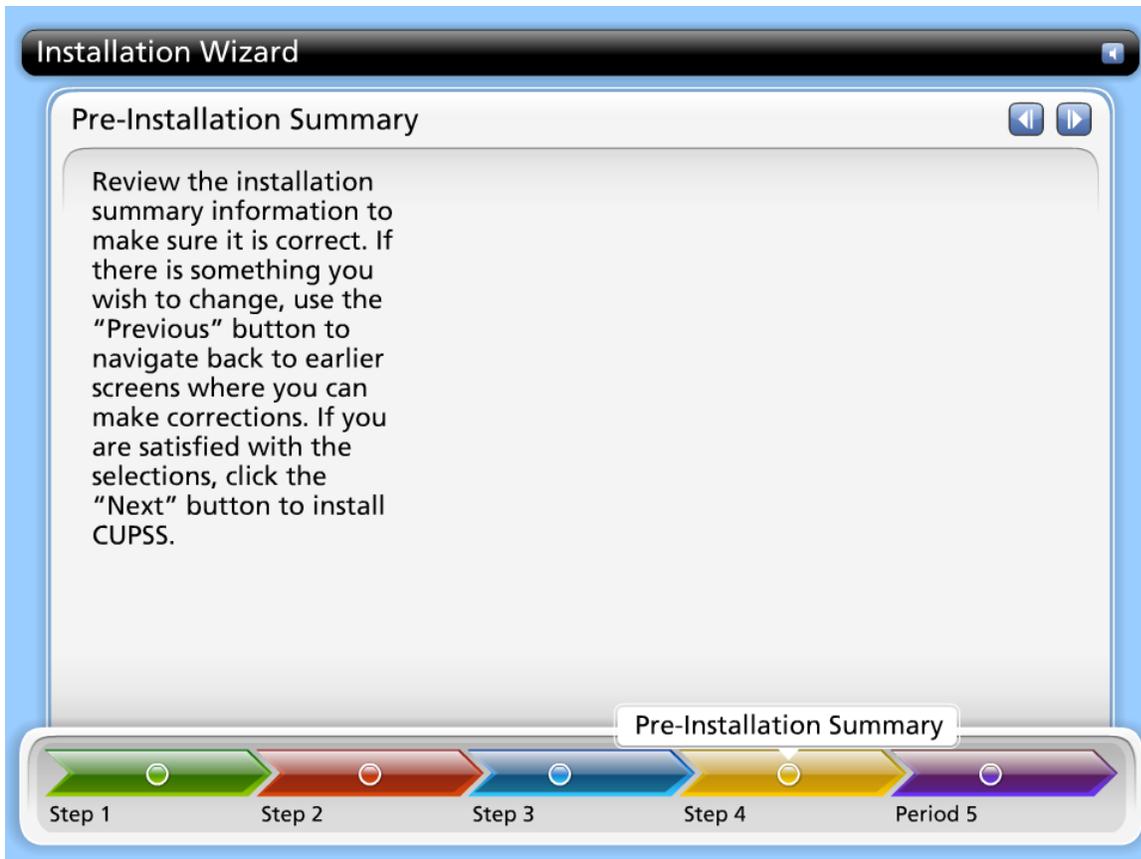
The right hand side of the wizard shows the steps required for installation. The left side provides instructions for what to do next. Click the "Next" button to proceed to the next step: choosing a shortcut folder.

Use the radio buttons to indicate where you would like to add a shortcut button to the CUPSS application. Select the "Create Icons for All Users" checkbox if you would like a CUPSS icon added to all user accounts on your computer. Click "Next" when you are done to proceed to the next step: choosing an installation folder.



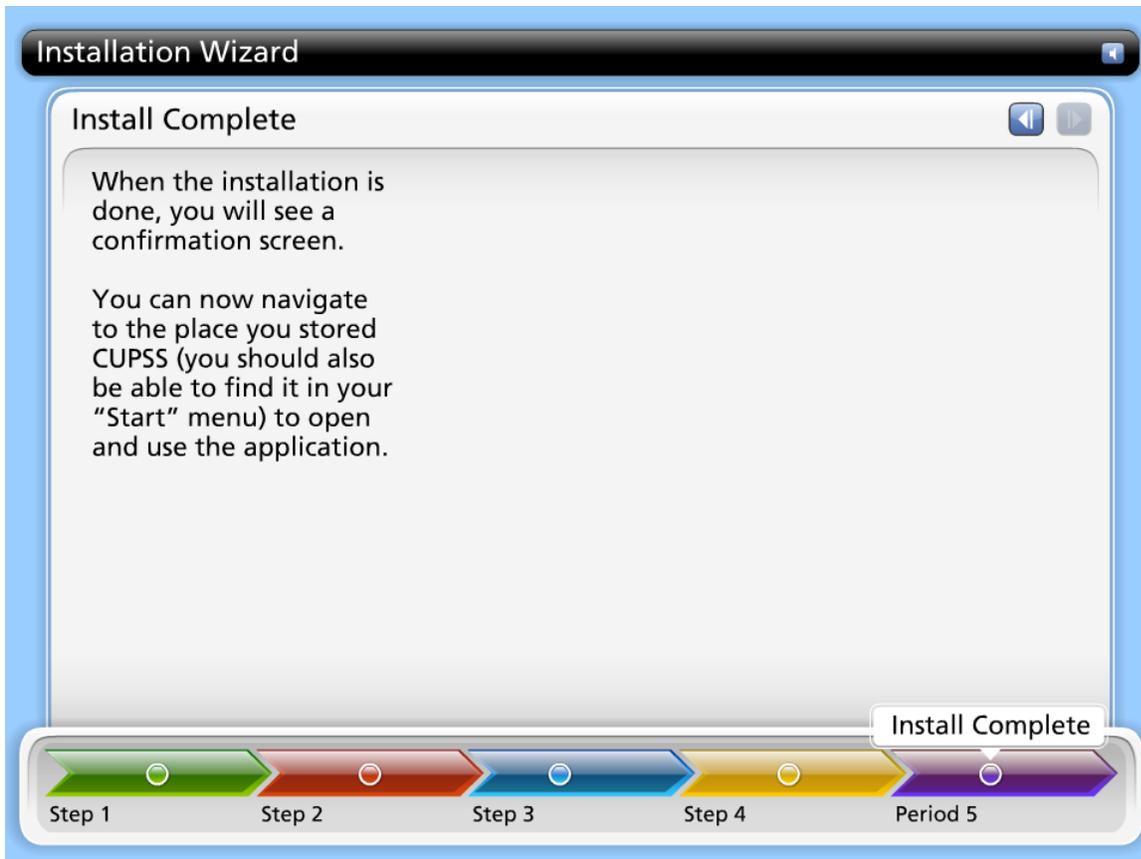
Choose Install Folder

The installation wizard selects a default location for the CUPSS program files. If you would like to select a different location, click "Choose..." and navigate to the folder where you want the files to be saved. Click "Restore Default Folder" to reset the save location to the CUPSS default choice. When you are done, click "Next" to move to the next step: the pre-installation summary.



Pre-installation Summary

Review the installation summary information to make sure it is correct. If there is something you wish to change, use the “Previous” button to navigate back to earlier screens where you can make corrections. If you are satisfied with the selections, click the “Next” button to install CUPSS.



Install Complete

When the installation is done, you will see a confirmation screen.

You can now navigate to the place you stored CUPSS (you should also be able to find it in your “Start” menu) to open and use the application.

What Are We Learning?

Part 3: 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.

Main Menu

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

For Part 3 of this lesson, we want to learn how to set up CUPSS. The theme for Part 3 is, "Setting Up CUPSS."

Why Set Up CUPSS?

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

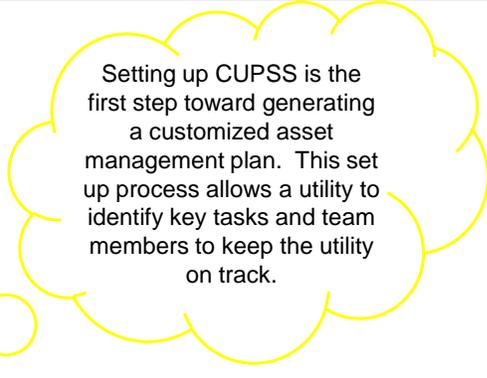


CUPSS User's Guide – Section 3

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Setting up CUPSS is done one time and allows you to customize the tool to fit your individual asset management implementation needs. You will enter your personal utility information, your user information, basic O&M tasks and additional 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.

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You should always be thinking of the end product – your asset management plan! This set-up process allows a utility to identify key tasks and team members to keep the utility on track.



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Setting Up CUPSS



Welcome Screen

When you first open CUPSS, you will see a welcome screen. To open CUPSS, select the CUPSS icon from your program menu or by using the desktop icon. On the welcome screen, click the "Enter Your CUPSS" button to

Welcome Screen

When you first open CUPSS, you will see a welcome screen. To open CUPSS, select the CUPSS icon from your program menu or by using the desktop icon. On the welcome screen, click the "Enter Your CUPSS" button to proceed to the startup page. If you would like to see an example of a completed CUPSS program, click the "Enter Example CUPSS" button. Information (including the username and password) is pre-populated in the example to show you what your CUPSS can and will look like.

For purposes of this training, we will use the Example CUPSS data. Any changes made to the Example CUPSS will be lost when updates are downloaded.

A new feature in CUPSS 1.3.5

Setting Up CUPSS



CUPSS Start Up

The first time you click "Enter Your CUPSS", you'll come to a screen directing you to get started with your set-up. From the initial startup page click the "Lets Get Started" button to enter the Getting Started module.

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Setting Up 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 project team
5. Review and save data

Get Started Using CUPSS

Before we get started, it is important to note that the data entered in the Getting Started module is not saved until you complete all five steps. If you close CUPSS before working through the entire Getting Started

Get Started Using CUPSS

Before we get started, it is important to note that the data entered in the Getting Started module is not saved until you complete all five steps. If you close CUPSS before working through the entire Getting Started module, your data is lost and you will need to go through the process again the next time you open CUPSS.

The first time you run CUPSS on your computer, it will run the Getting Started module. This module prompts you to enter some basic information about the utility, schedule standard operation and maintenance tasks, and add user information for the project team. You will only need to go through the set-up process once. Later, you can use the tools available within the application to edit and update this information.

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 project team
5. Review and save data

You only need to go through the set-up process once but remember that you cannot start and stop. You must finish the set-up process to proceed to the different CUPSS modules.

Setting Up CUPSS

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

Utility Information
The first thing you should be aware of is that your progress through the Getting Started module is shown using a tracking image at the top of each page.

Utility Information

The first thing you should be aware of is that your progress through the Getting Started module is shown using a tracking image at the top of each page.

The first task in the set-up process is to enter information about the utility. This is the Project and Utility Information page. Here, you will enter basic information about your project and utility.

Fields available on the Utility Information page:

- **Project Name *** Enter the name of the project.
- **Facility Name *** Enter the name of the utility.
- **Type of Facility *** Use the radio buttons to indicate whether this is a drinking water or wastewater facility.
- **PWSID (Drinking water facilities only) *** This field is made available if you select “Drinking Water” as the facility type. Enter the Public Water System identification number.
- **Estimated Number of Connections (Drinking water facilities only) *** This field is made available if you select “Drinking Water” as the utility type. Enter the number of customers receiving drinking water from the utility.

- **NPDES NUMBER (Wastewater facilities only)*** This field is made available if you select “Wastewater” as the utility type. Enter your National Pollutant Discharge Elimination System number here.
- **Flow (mgd) (Wastewater facilities only)*** This field is made available if you select “Wastewater” as the utility type. Enter the number of million gallons per day processed through the utility.
- **Street Address *** Enter the street address of the utility.
- **City *** Enter the city where the utility is located.
- **State *** Select the state where the utility is located from the dropdown menu.
- **Zip *** Enter the ZIP code of the utility.
- **Phone** Enter the phone number for the utility.
- **Fax** Enter the fax number for the utility.

When you have completed the form, click the “Continue” button to move to the next step.

The screenshot shows a software window titled "Setting Up CUPSS" with a navigation bar at the top containing back, forward, and refresh buttons. The main content area displays the "Check Up Program for Small Systems" interface. A progress bar at the top of the form indicates the current step is "Utility Information". Below the progress bar, a message states: "The first step in setting up CUPSS is to enter your basic utility information." A red asterisk (*) indicates required fields. The form includes fields for "Utility Name", "Select Type of Facility", "NPDES", "Estimated Number of Connections", "Street Address", "City", "State", "Zip", "Phone", and "Fax". A modal error message box is overlaid on the form, displaying a yellow warning icon and the text: "CUPSS. Address is required. City is required. State is required. Zip Code is required." The "Continue" button at the bottom of the form is disabled. At the bottom of the screenshot, a dark blue banner contains the text: "Utility Information. If you try to move to the next page without filling out all of the required fields, you will see an error message with a list of fields that require data before you can continue. This will happened for all forms".

Utility Information Continued

If you try to move to the next page without filling out all of the required fields, you will see an error message with a list of fields that require data before you can continue. This will happened for all forms within the CUPSS application.

It is possible to store information for more than one project and more than one utility within CUPSS. After the initial set-up, you can go back and add additional projects or utilities and manage the assets for each. We'll go over this later.

The screenshot shows a web browser window titled "Setting Up CUPSS". Inside the browser, a page titled "Check Up Program for Small Systems" is displayed. The page has a progress bar at the top with five steps: "Getting Started", "Add Utility", "Add Project", "Manage", and "Reports". The "Getting Started" step is currently active. Below the progress bar, there is a heading "Getting Started: Your Information" and a sub-heading "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." A red asterisk indicates that fields marked with an asterisk are required. The form contains the following fields: "Name" (First Name: "John", Last Name: "Howard"), "Organization" ("Ready View Acres Landowners Assn"), "Title" ("Treasurer/Secretary"), "Email" ("readyview@gmail.com"), "Role" (a dropdown menu with "Board Member" selected), "Same as Utility" (checkbox), "Street Address" ("PO Box 798"), "City, State, Zip" ("Gray Summit, Missouri, 64439"), "Phone, Fax" ("766-471-2375"), "Enter Username" ("HCHW80"), "Enter Password" (masked with asterisks), and "Confirm Password" (masked with asterisks). A "Finish" button is located at the bottom of the form.

User Information
The second step in the Getting Started module is to enter your personal information to set-up your user account. All users can add new project and utility information, determine who can access the various projects

User Information

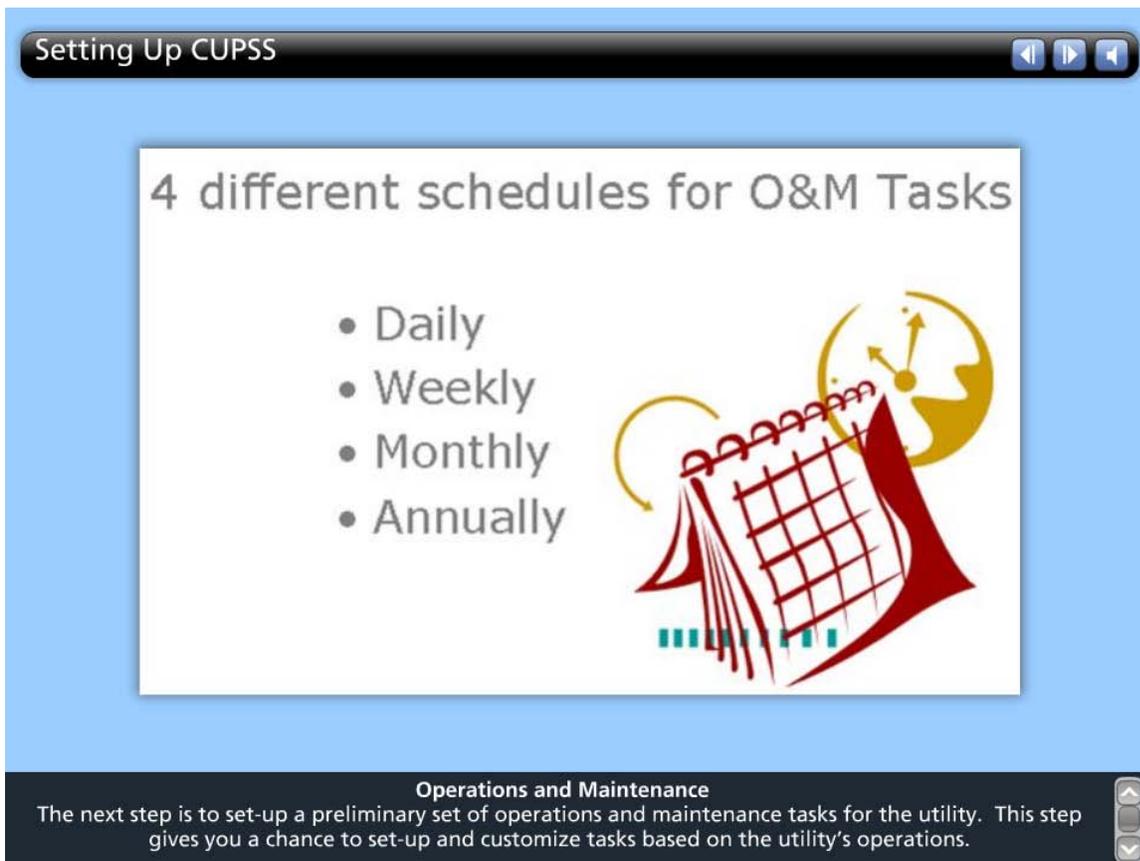
The second step in the Getting Started module is to enter your personal information to set-up your user account. All users can add new project and utility information, determine who can access the various projects set-up within CUPSS, and add additional project team members.

Fields available on the User Information page:

- **First Name** * Enter your first name.
- **Middle Initial** Enter your middle initial, if applicable.
- **Last Name** * Enter your last name.
- **Organization** Enter the name of your organization.
- **Title** Enter your job title.
- **Email** Enter your primary e-mail address.
- **Role*** Select your position within the organization from the dropdown menu.
- **Same as facility checkbox** Indicate whether your mailing address is the same as that of the facility you entered on the previous screen. If so, the address fields below this checkbox will automatically populate with the stored information.

- **Street Address** If your mailing address is different than that of the facility, enter you street address.
- **City** Enter your city.
- **State** Select your state from the dropdown menu.
- **Zip** Enter your ZIP code.
- **Phone** Enter your phone number.
- **Fax** Enter your fax number.
- **Enter Username** *Enter a username. This is the name you will use the next time you log into CUPSS.
- **Enter Password** * Enter a password. This is the password you will use the next time you log into CUPSS.
- **Confirm Password** * Re-enter the password to confirm.

When you have completed the form, click the “Continue” button to move to the next page.



The screenshot shows a software window titled "Setting Up CUPSS". Inside the window, there is a slide with the title "4 different schedules for O&M Tasks". The slide lists four options: Daily, Weekly, Monthly, and Annually. To the right of the list is a graphic of a red calendar with a yellow sun and a clock face. Below the slide, there is a dark blue footer area with the text "Operations and Maintenance" and a paragraph: "The next step is to set-up a preliminary set of operations and maintenance tasks for the utility. This step gives you a chance to set-up and customize tasks based on the utility's operations." There are navigation arrows in the top right and bottom right corners of the window.

Operations and Maintenance

The next step is to set-up a preliminary set of operations and maintenance tasks for the utility. This step gives you a chance to set-up and customize tasks based on the utility's operations.

This section of the Getting Started module is spread out over four pages. Tasks are presented based on frequency of occurrence. On the first page, you are presented with a list of standard maintenance tasks common to many utilities that typically occur on a daily basis. The next three pages show weekly, monthly and annual tasks.

For all four pages, use the checkboxes next to the task name to select which tasks to add to your O&M schedule and use the fields to the right of each listed task to establish the frequency with which these tasks occur. These tasks are what EPA recommends for small drinking water utilities using groundwater.

By default, all tasks are selected when the Daily Tasks page is first opened. You should think very carefully before keeping this default option of all tasks, especially for the daily tasks.

If you perform some of the tasks on the Daily Tasks page on a weekly, monthly, or annual basis, use the fields to the right of the task to change the frequency of occurrence (there is no need to change anything if the task is performed on a daily basis).

All tasks selected and scheduled in the Getting Started module are added to the CUPSS calendar. You will be able to modify, delete and add tasks from within CUPSS once you complete the initial set-up process. We'll talk more about the calendar later.



Check Up Program for Small Systems

Getting Started: Utility Operation and Maintenance Default Daily Tasks

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

The following routine maintenance tasks are set to occur daily.

<input checked="" type="checkbox"/> Check water meter readings and record water production.	Change tasks recurrence frequency by: <input type="text"/> Select Frequency
Weekly recurrence every: <input type="text"/> Week(s) on: <input type="text"/> Select Day	
Monthly recurrence on: <input type="text"/> Select Week <input type="text"/> Select Day every month	
Annual recurrence the: <input type="text"/> Select Week <input type="text"/> Select Day of <input type="text"/> Select Month	
<input checked="" type="checkbox"/> Check chemical solution tanks and record amounts used.	Change tasks recurrence frequency by: <input type="text"/> Select Frequency
Weekly recurrence every: <input type="text"/> Week(s) on: <input type="text"/> Select Day	
Monthly recurrence on: <input type="text"/> Select Week <input type="text"/> Select Day every month	
Annual recurrence the: <input type="text"/> Select Week <input type="text"/> Select Day of <input type="text"/> Select Month	
<input checked="" type="checkbox"/> Check and record water levels in storage tanks.	Change tasks recurrence frequency by: <input type="text"/> Select Frequency
Weekly recurrence every: <input type="text"/> Week(s) on: <input type="text"/> Select Day	

O&M - Daily Tasks

The first page of the O&M section shows tasks that typically occur on a daily basis.

O&M – Daily Tasks

The first page of the O&M section shows tasks that typically occur on a daily basis.

- Check water meter readings and record water production.
- Check chemical solution tanks and record amounts used.
- Check and record water levels in storage tanks.
- Inspect chemical feed pumps.
- Check and record chlorine residual at the point of application.
- Check and record chlorine residual in the distribution system.
- Inspect booster pump stations.
- Check and record fluoride concentration in the distribution system.
- Record well pump running times and pump cycle starts.
- Check instrumentation for proper signal input/output.
- Investigate customer complaints. Use special “Telephone Threat” card to record threats or suspicious activity.
- Complete a daily security check.
- Inspect heater operation during winter months.
- Inspect well pumps, motors, and controls.

When you have finished entering data, click the “Continue” button at the bottom of the page to proceed to the next page.

O&M - Weekly Tasks

The next page of the O&M section lists tasks commonly performed on a weekly basis.



O&M – Weekly Tasks

The next page of the O&M section lists tasks commonly performed on a weekly basis.

- Inspect chlorine and fluoride testing equipment.
- Clean pump house and grounds. Make sure fire hydrants are accessible.
- Record pumping rate for each well or source water pump.
- Conduct weekly security check.

When you have finished entering data, click the “Continue” button at the bottom of the page to proceed to the next page.



Check Up Program for Small Systems

Getting Started: Utility Operation and Maintenance Default Monthly Tasks

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

Monthly Tasks	Scheduled Day for Maintenance
The following routine maintenance tasks are set to occur monthly	
<input checked="" type="checkbox"/> Read electric meter at pump house and record.	Change the default monthly recurrence to First week of every month on Monday or Change this task's recurrence frequency to: Select Frequency Weekly recurrence every [] Week(s) on [Select Day] Annual recurrence the [Select Week] [Select Day] of [Select Month]
<input checked="" type="checkbox"/> Take appropriate monthly water quality samples.	Change the default monthly recurrence to First week of every month on Monday or Change this task's recurrence frequency to: Select Frequency Weekly recurrence every [] Week(s) on [Select Day] Annual recurrence the [Select Week] [Select Day] of [Select Month]
<input checked="" type="checkbox"/> Check and record static and pumping levels of each well.	Change the default monthly recurrence to First week of every month on Monday or

O&M - Monthly Tasks

The next page of the O&M section lists tasks commonly performed on a monthly basis.



O&M – Monthly Tasks

The next page of the O&M section lists tasks commonly performed on a monthly basis.

The standard list of monthly tasks includes:

- Read electric meter at pump house and record.
- Take appropriate monthly water quality samples.
- Check and record static and pumping levels of each well.
- Read all customer meters and compare against total water produced for the month.
- Inspect well heads.
- Lubricate locks.
- Check on-site readings against lab results.
- Confirm submittal of monthly reports.

When you have finished entering data, click the “Continue” button at the bottom of the page to proceed to the next page.



Check Up Program for Small Systems

Getting Started: Utility Operation and Maintenance: Annual Tasks

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

Annual Tasks	Scheduled Day for Maintenance
The following routine maintenance tasks are set to occur annually	
<input checked="" type="checkbox"/> Overhaul chemical feed pumps (O rings, check valves, and diaphragms).	Change the default annual recurrence the First Monday of January or Change this task's recurrence frequency to: Select Frequency Weekly recurrence every [] Week(s) on [] Select Day Monthly recurrence on [] Select Week [] Select Day every month
<input checked="" type="checkbox"/> Inspect and clean chemical feed lines and solution tanks.	Change the default annual recurrence the First Monday of January or Change this task's recurrence frequency to: Select Frequency Weekly recurrence every [] Week(s) on [] Select Day Monthly recurrence on [] Select Week [] Select Day every month
<input checked="" type="checkbox"/> Calibrate chemical feed pumps after overhaul.	Change the default annual recurrence the First Monday of January or Change this task's recurrence frequency to: Select Frequency

O&M - Annual Tasks

The next page of the O&M section lists tasks commonly performed on an annual basis.

O&M – Annual Tasks

The next page of the O&M section lists tasks commonly performed on an annual basis.

The standard list of annual tasks includes (default recurrence frequency shown in parentheses):

- Overhaul chemical feed pumps (O rings, check valves, and diaphragms). (first Monday in January)
- Inspect and clean chemical feed lines and solution tanks. (first Monday in January)
- Calibrate chemical feed pumps after overhaul. (first Monday in January)
- Begin Safety Equipment Repair Log. Maintain log continuously throughout the year. (first Monday in January)
- Operate all valves inside the treatment plant and pump house. Maintain log continuously throughout. (first Monday in January)
- Review emergency response plans. (first Monday in January)
- Inspect chemical safety equipment and repair or replace as needed. (first Monday in February)
- Operate all valves inside the treatment plant and pump house. (first Monday in February)
- Inspect, clean, and repair control panels in pump house and treatment plant. (first Monday in March)
- Exercise half of all mainline valves. (first Monday in March)
- Inspect and clean chemical feed lines and solution tanks. (first Monday in April)

- Calibrate chemical feed pumps. (first Monday in April)
- Inspect storage tanks for defects and sanitary deficiencies. (first Monday in May)
- Clean storage tanks if necessary. (first Monday in May)
- Flush the distribution system and exercise/check all fire hydrant valves. (first Monday in June)
- Perform preventive maintenance on treatment plant and pump house buildings. (first Monday in June)
- Inspect and clean chemical feed lines and solution tanks. (first Monday in July)
- Calibrate chemical feed pumps. (first Monday in July)
- Prepare a demand forecast. Identify and evaluate energy conservation measures (for your utility). Identify and evaluate distribution system leaks. Establish/update water loss mitigation program. Establish/update customer incentive program for water efficient home devices. (first Monday in July)
- Operate all valves inside the treatment plant and pump house. (first Monday in August)
- Exercise mainline valves that were not exercised in March. (first Monday in September)
- Prepare system for winter operation. This task may be postponed until October or November, based on local conditions. (first Monday in September)
- Make sure unnecessary equipment is properly decommissioned. (first Monday in September)
- Inspect and clean chemical feed lines and solution tanks (first Monday in October).
- Calibrate chemical feed pumps (first Monday in October).
- Prepare system for winter operation if not completed in September or October (first Monday in November).
- Contact an electrician to check running amps on well pumps (first Monday in December)

When you have finished entering data, click the “Continue” button at the bottom of the page to proceed to the next page.



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.

Assemble Your Team

Next, it is time to enter information about the people associated with this project - your team members. Your team is a critical component of your day to day operations. It is important to coordinate with them as you



Assemble Your Team

Next, it is time to enter information about the people associated with this project – your team members. Your team is a critical component of your day to day operations. It is important to coordinate with them as you work through the CUPSS application and implement your asset management plan.

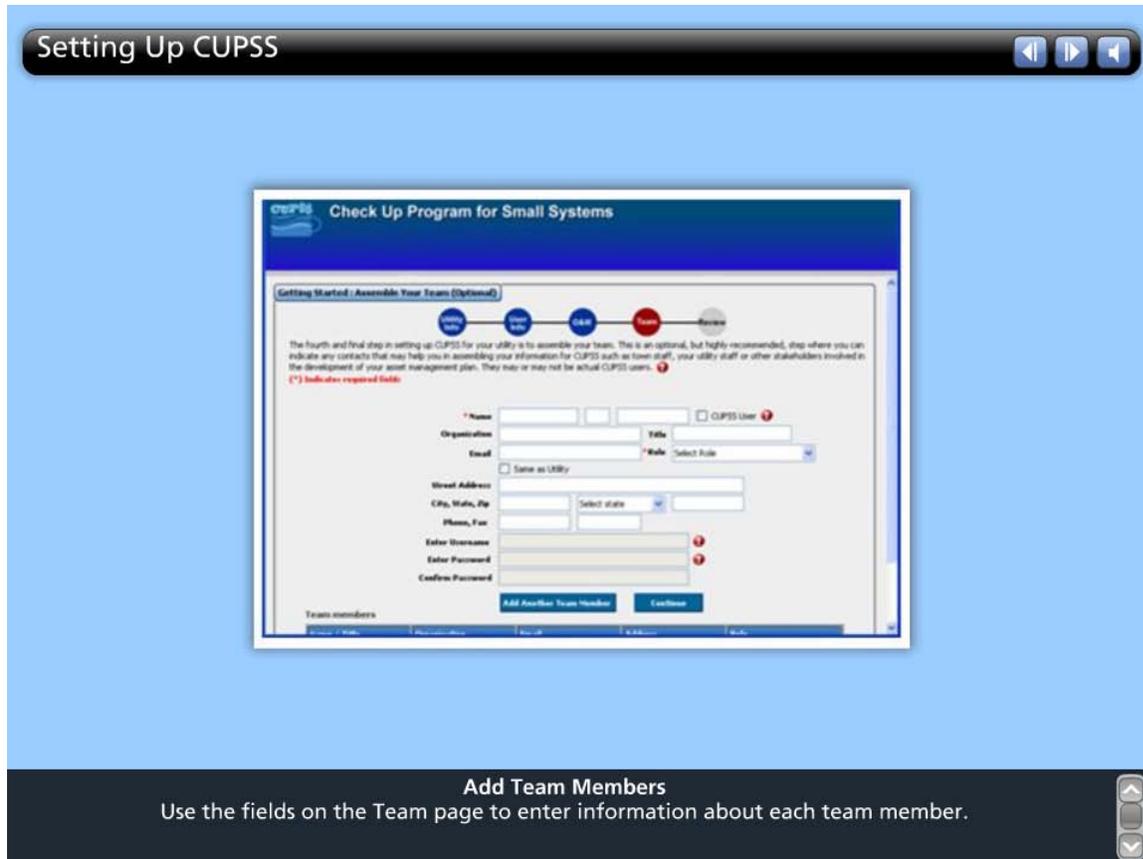
There is a long list of people that could potentially be team members!

Your team may include the following people:

- Water system operators and engineers (including upper management)
- Local and elected officials (e.g., mayor, council, town manager)
- Accounting staff
- Information technology staff
- Treasurer
- Other infrastructure managers and staff from other utilities (e.g., roads, sewers and electric)
- Representatives from conservation and environmental groups
- Representatives from neighboring water districts
- Members of the community
- And anyone else you work with in your day-to-day operations.

To help ensure the success of your asset management plan, your team should be supported by political leaders who have the authority and willingness to commit public resources and personnel. Your team should also have key decision makers who represent the departments involved with asset management. For more information on how to build a successful asset management team, see the EPA's Fact Sheet Building an Asset Management Team.

CUPSS includes information about all team members in your CUPSS Asset Management Plan. We'll go over the Asset Management Plan in Session 3.



The screenshot shows a web browser window titled "Setting Up CUPSS" with navigation arrows. The main content area displays the "Check Up Program for Small Systems" interface. A progress bar at the top indicates the current step is "Add Team Members" (highlighted in red), with previous steps being "Get Started", "Set Up", and "Review". Below the progress bar, a text box explains that this is the fourth and final step to assemble a team, which is optional but recommended. A note states that contacts provided are for information only and may not be actual CUPSS users. A red asterisk indicates required fields. The form includes fields for Name, Organization, Email, Title, Role (a dropdown menu), Street Address, City, State, Zip, Phone, Fax, Enter Username, Enter Password, and Confirm Password. There are "Add Another Team Member" and "Continue" buttons at the bottom of the form. A "Teams members" section is partially visible at the bottom left of the form area.

Add Team Members
Use the fields on the Team page to enter information about each team member.

Add Team Members

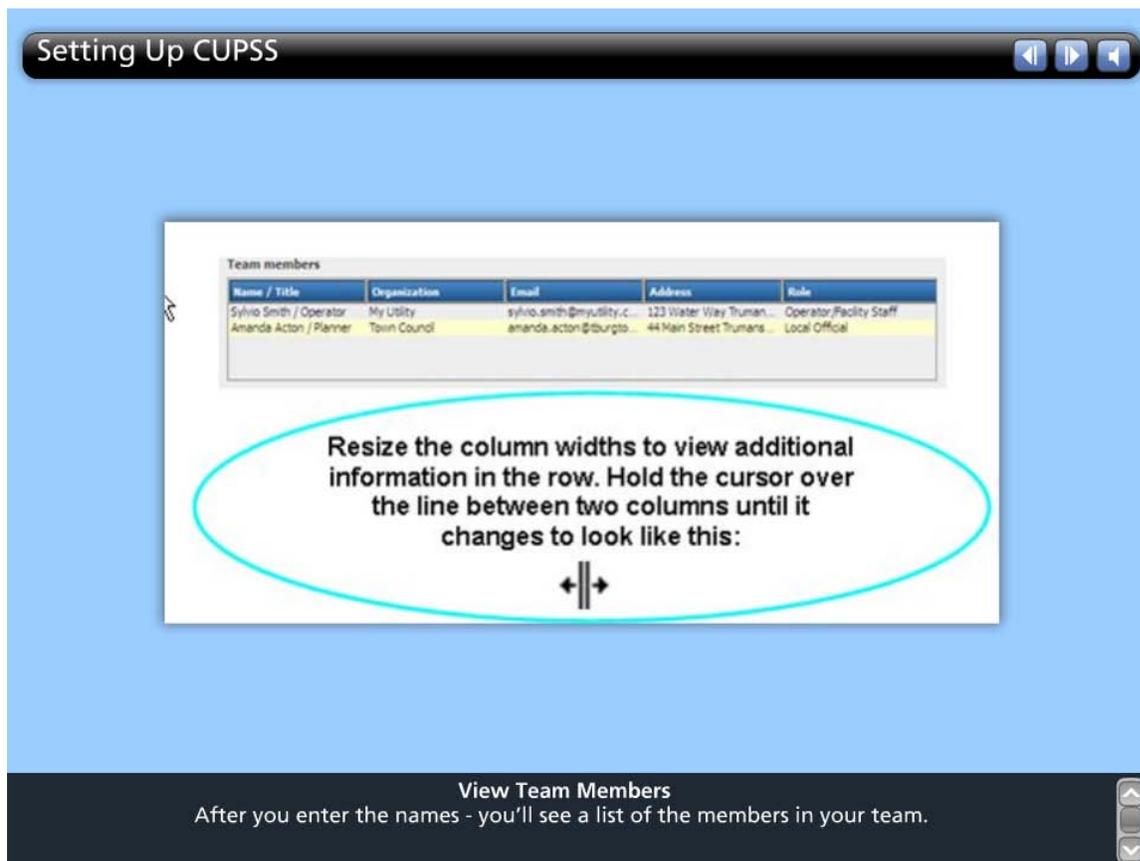
Use the fields on the Team page to enter information about each team member.

Keep in mind that additional team members can be added later within the CUPSS application using the Create User feature.

Team members can be set-up as CUPSS users or as non-users. Team members established as CUPSS users are given a username and password to access the application for the purposes of adding and editing project information. When you first set-up a team member as a CUPSS user, you can give them a preliminary username and password. Give this information to the appropriate team member so he or she can

log into CUPSS. All users can change their user information at any time through the Set-Up feature.

Click the “Add Another Team Member” button to save the record and clear the data entry form. The names of the people you already entered are displayed in a table below the data entry fields.



Setting Up CUPSS

Name / Title	Organization	Email	Address	Role
Sylvio Smith / Operator	My Utility	sylvio.smith@myutility.c...	123 Water Way Truman...	Operator/Facility Staff
Amanda Acton / Planner	Twin Council	amanda.acton@burgto...	44 Main Street Truman...	Local Official

Resize the column widths to view additional information in the row. Hold the cursor over the line between two columns until it changes to look like this:



View Team Members

After you enter the names – you’ll see a list of the members in your team.

If you want to view additional information in the row, it’s possible to resize the column widths. To do this, hold the cursor over the line between two columns until it changes to look like this: [point to line with double arrows on PowerPoint] . Click and drag the line back and forth to resize the column width. The columns on all tables within CUPSS can be resized in this way.

To sort the data in the table, click on the column heading you wish to sort data by. Click once to sort the data in ascending order. Click a second time to sort the data in descending order. A small arrow appears next to the column name to show whether the data is sorted in ascending (up arrow) or descending (down arrow) order.



Edit Records

Name / Title	Organization	Email	Address	Role	CUPSS User
Alden McDonald / C...	Beauty View Acres		101 EASTERN COB...	Head Operator	Yes
Dan Daugherty / ...	Missouri Departmen...	Missouri@dr...	8 St...	State Contact	Yes
Dennis Siders / Reg...	Midwest Assistance...	midwest@maq...	Man...	Technical Assistanc...	Yes
John Hoagland / Ad...	Missouri Rural Wat...	ruralwater@re...	1st St...	Technical Assistanc...	Yes
Robert Dunlevy / E...	USEPA	EPAwater@epa.gov	907 N 12th Street	EPA Contact	Yes

Delete Records

Edit and Delete Team Members

You also have the ability to edit or delete team members. Using the right mouse button to click the name of a team member in the table offers you two more options: editing and deleting records. Select "Edit Row" to



Edit and Delete Team Members

You also have the ability to edit or delete team members. Using the right mouse button to click the name of a team member in the table offers you two more options: editing and deleting records. Select "Edit Row" to repopulate the form fields with the previously-entered data for the selected team member. Select "Remove Row" to delete the team member from the list.

When you have finished entering data on the Team page, click the "Continue" button to move to the next page.

Setting Up CUPSS

Getting Started: Review and Save

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 "Go Back" 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

Utility Name: Beauty View Area Substation - DM
PMSID: R04000204
Scheduled Number of Connections: 33
Flow (gpd):
Address: PO Box 2145 Gray Summit Missouri 63039
Phone/Fax: 636 780 2265

User Information

Name: Helen Howard
Title: Treasurer/Secretary
Organization: Beauty View Area Landowners Assn
Role: Board Member
Email: BeautyView@gmail.com
Address: PO Box 2145 Gray Summit Missouri 63039
Phone / Fax: 636 780 2265
Username: HHOWARD
Password: BEAUTY

Team Information

Name / Title	Organization	Email	Address	Role
Allen McCreary / Chief O&M	Beauty View Area Subst.	AllenM@beautyview.org	PO Box 2145 Gray Summit, MO 63039	Head Operator
Don Daugherty / Water	Missouri Department of Re.	daugherty@mo.gov	1001 S. Main St. St. Louis, MO 63102	State Contact
David Siders / Regional	Missouri Assistance Prog.	siders@mo.gov	PO Box 955 William Penn, MO 63090	Technical Assistance Provider
John McCreary / Industrial	Missouri Department of Re.	johnm@mo.gov	1001 S. Main St. St. Louis, MO 63102	Technical Assistance Provider
Robert Durland / Director	UDRPA	rdurland@udrpa.gov	10776 S. 20th Kansas, KS 66216	EDA Contact
Tom Bowman / CEO	UDRPA	tbowman@udrpa.gov	10776 S. 20th Kansas, KS 66216	EDA Contact
Steve Hovatt / Engineer	Missouri Department of Re.	shovatt@mo.gov	PO Box 175, Jefferson, MO 64501	EDA Contact

Back and Edit Save and Continue Exit

Set Up Review

The Review page is the last page in the Getting Started module. Here, you can see all the information you have entered for the utility, yourself (or the person you entered as the primary user for the utility), and the

Set Up Review

The Review page is the last page in the Getting Started module. Here, you can see all the information you have entered for the utility, yourself (or the person you entered as the primary user for the utility), and the information entered for each team member. This page does not show the information entered on the O&M pages. You can view and edit maintenance tasks in the My O&M module after exiting the Getting Started module. We'll talk about the MY O&M module in Session 2.

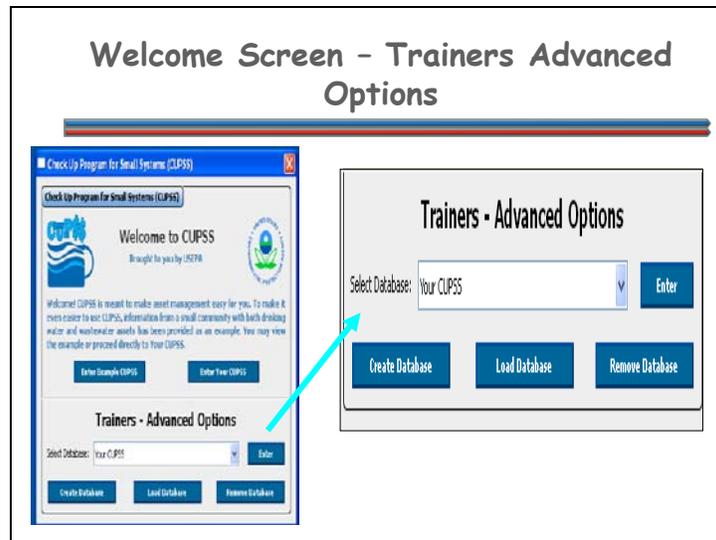
To make changes to the data you entered in the Getting Started module, click the "Back and Edit" button. This will bring you back to the Utility page which is the first page in the Getting Started section. You can view and edit the information entered during the set-up process as many times as needed before exiting the Getting Started module. You will not lose any of the information you've already entered by going back to edit information.

If you are satisfied with the information shown on the Review page, click the "Save and Continue" button at the bottom of the page to proceed.

The slide features a title "What Are We Learning?" at the top, followed by a decorative horizontal line with blue and red segments. Below this is the subtitle "Part 4: Advanced Trainer Options" in an italicized font. In the bottom right corner, there is a small blue button labeled "Main Menu".

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

For Part 4 of this lesson, we want to understand advanced tools to assist CUPSS trainers. The theme for Part 4 is, "Advanced Trainer Options."

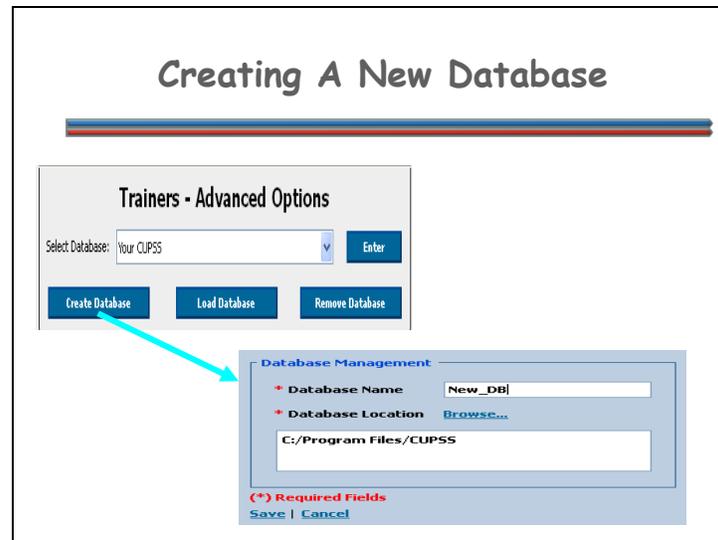


Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Once you have gone through the setup process, the next time you log in to CUPSS, it prompts you to select the database that you want to use.

Database Management

CUPSS allows you to manage more than one database in the application. You can create new databases that are separate than the databases used to power “Your CUPSS” and the “Example CUPSS.” These additional databases can be useful for CUPSS Trainers who are working with multiple utilities in implementing CUPSS. Trainers have the ability to remove these databases from the application and load them later at different locations.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Creating a New Database

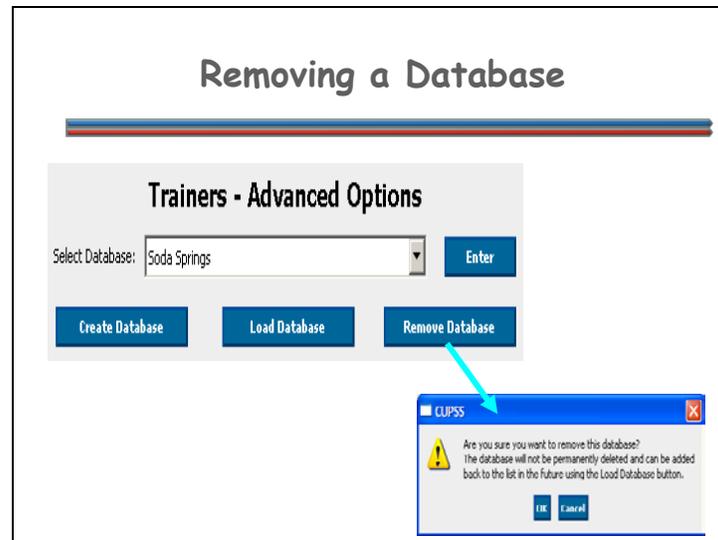
To create a new database to store your information, click the “Create Database” button on the startup page. The *Database Management* page appears. Enter the new database name, and use the “Browse...” button to designate the folder in which to store the database. Click “Save” to create the new database.

If the folder you selected for database location already has a database, a popup message appears asking you to confirm saving the database in the same folder. To make management easier, you might consider creating a new folder, then return to this screen to save your database in an empty folder. Storing the new database in the same folder does not delete existing databases. The database is not created until you enter the application and go through the setup pages.

Create Database – creates a new database

- Click the ‘Create Database’ button
- Enter name [Demo example: ‘Create 1’]
- Browse to CUPSS database location [Demo example: ‘CUPSS Download Files – Feb2010’] and select ‘database’

- Click 'Make New Folder button' and name new folder [Demo example: 'Create Example']
- Click Ok
- Click Save
- Database name now appears in dropdown list



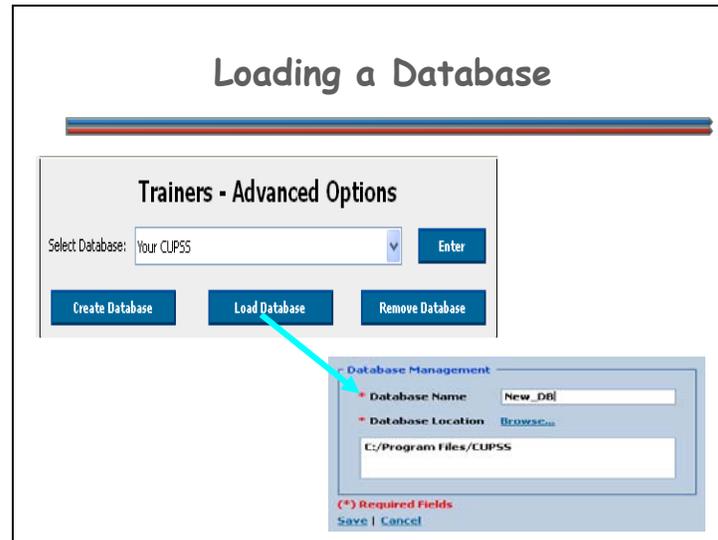
Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Removing a Database

To remove a database from the application list, select the database from the “Select Database” dropdown list and click the “Remove Database” button. Note that you can only remove databases that you have created, not the “Your CUPSS” or “Example CUPSS” databases. A confirmation message appears before the database is removed. The database is not deleted from your system, but it is removed from the “Select Database” dropdown list. You can use the “Load Database” button to load the database after you remove it.

Remove Database – deletes database name within the dropdown list on the software on this computer

- Select a database that has been added to the dropdown
- Click the ‘Remove Database’ button
- Database name no longer appears in dropdown list
- {Can’t delete ‘Your CUPSS’ or ‘Example’ databases}
- {This is not deleting the database from your computer, just from this list on this software}



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Loading a Database

To load a database that you previously created, click the “Load Database” button from the startup page. Enter the database name and location into the *Database Management* page and click the “Save” button. The database can now be selected from the “Example CUPSS” dropdown list.

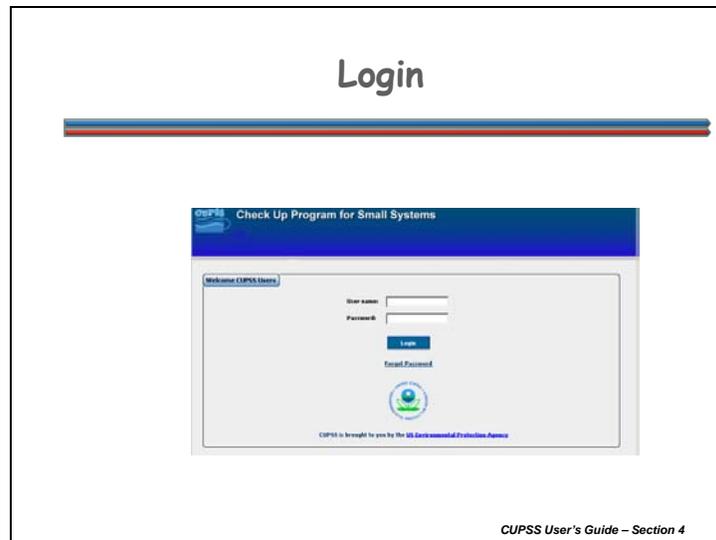
Load Database – loads existing database not within the software on this computer

- Click the ‘Load Database’ button
- Enter name [Demo example: ‘Load 1’]
- Browse to the folder that contains your database on your thumb drive or CD [Demo example: ‘DATABASE SWITCH’]
- Click Ok
- Click Save
- Database name now appears in dropdown list

The screenshot shows a presentation slide with a black border. At the top, the title "What Are We Learning?" is centered in a bold, dark grey font. Below the title is a decorative horizontal line consisting of three parallel lines in blue, red, and blue. The main content of the slide is "Part 5: Login and navigate CUPSS" in a grey font. In the center, there is a white rectangular box with a black border containing the text "Benefits to My Utility" in bold, followed by "CUPSS provides a secure interface and allows you to set-up multiple users to work on a utility." in a smaller font. In the bottom right corner of the slide, there is a small blue button with the text "Main Menu" in white.

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

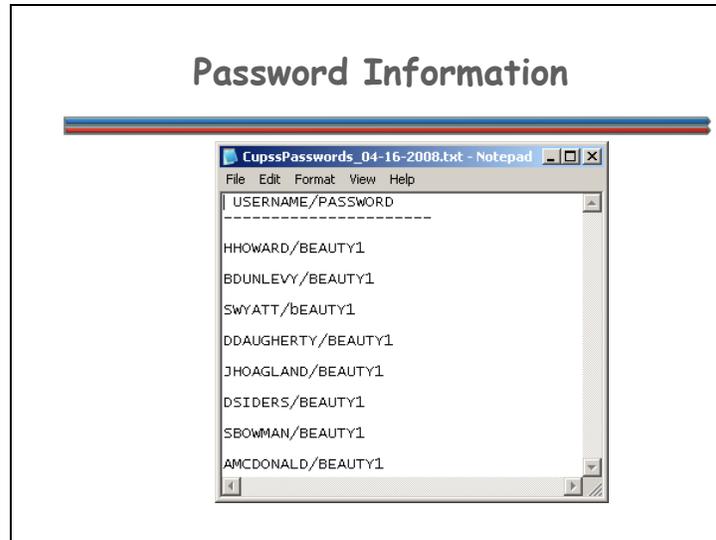
For Part 5 of this lesson, we work to understand how to login and navigate through CUPSS.. The theme for Part 5 is, "Login and navigate CUPSS."



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Once you have gone through the set-up process, the next time you log in to CUPSS you will be asked for login information. If you are the one who set-up CUPSS initially (by working through the Getting Started module), this is the username and password entered on the User Information page. If you are not the one who set-up CUPSS, the person who established you as a CUPSS user can provide you with the username and password he or she set-up for you. Username and password information can be changed at any time from within the CUPSS application. We'll talk about this shortly.

If you do not remember your username and password, this information is available in the directory you selected during the set-up process.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Your directory contains all the passwords of each user. It's suggested that not everyone know about this directory.

Select Utility

Utility Selection Options

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 User's Guide – Section 4

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

Once you have successfully logged in, you are prompted to select the utility you wish to work on.

Use the dropdown menu to select the utility you wish to work with. Click the “Load Utility” button to pick a utility. As you can see from the smaller screenshot, the example CUPSS gives you the option of viewing a drinking water utility or a wastewater utility.

If the project you wish to work on has not yet been entered into CUPSS, you can click the “Add Another Utility” button to go through a set-up process to add information for another project and utility.

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!

CUPSS User's Guide – Section 4

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

When the CUPSS My Home page first opens, you will see the Task Notification popup window. The Task Notification popup window shows all tasks that are currently due. These are the tasks that you selected in the beginning of the set-up process. As you can see there are a lot of tasks. This is the amount of tasks that will appear in your popup window if you select the defaults for the daily, weekly, monthly, and annual O&M tasks.

The CUPSS My Home page acts as a jumping-off point to all of the CUPSS modules and. It also provides you with some quick information about the status of your scheduled tasks and assets. This is the page that you will see every time you log onto CUPSS.

Navigate Through CUPSS



The screenshot shows the CUPSS application window titled "Check Up Program for Small Systems". The interface is divided into two main sections. The top section, labeled "Navigation Area", contains a menu bar with options like "Home", "My Home", "My Reports", "My Tools", "My Settings", "My Profile", and "My Help". Below the menu bar is a grid of icons for various activities: "No Service Troubleshooting", "Create or Update PPE Schematics", "Create or Update PPE Inspections", "Enter the Check List Reports", "Enter a New Task or Work Order", "Search, Alert, and Maintenance", "Enter PPE Placements", and "Work on the CUPSS Plan". The bottom section, labeled "Activity Windows", contains a calendar for the month of May 2016 and a table titled "City Personnel and Alerts".

Navigation Area

- Includes the administration menu and the CUPSS module buttons

Activity Windows

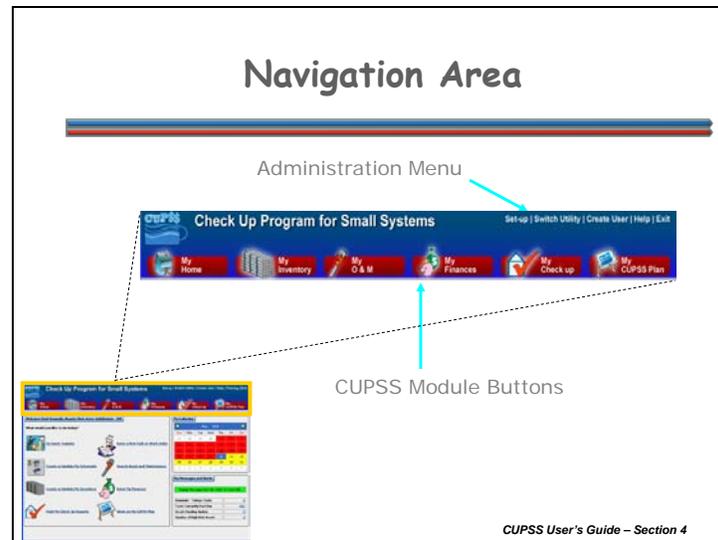
- Where you will view, edit and manipulate data

CUPSS User's Guide – Section 4

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

The My Home page is a good place to introduce you to the standard navigation features of CUPSS. The CUPSS application window is divided into two main sections:

- The navigation area, which includes the administration menu and the CUPSS module buttons, and
- The activity window, which is where you will view, edit and manipulate data.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

The navigation area is available from almost any module. This allows you to jump between modules and change the settings for the utility.

ADMINISTRATION MENU

The administration menu (in the upper right of the navigation area) helps you manage your CUPSS account and project information. The options available in the administration menu include:

- Set-up

This menu option launches the set-up module, where you can edit the information for the current project (Utility Info), information for the primary user (User Info), and the information about the project team members (Team). This is very similar to the module that allows you to add another utility from the Select Utility page.

- Switch Utility

Use this option to change the active project. Here, you are presented with the same page you see when first logging in to CUPSS. Select a project from the dropdown menu

and click “Load Utility” to load data for the selected project or click “Add Another Utility” to enter data for a new project.

- **Create User**

Click on the “Create User” link to add another member of your project team. This link takes you directly to the Team page within the Set-up module. The only difference between the Create User page and the Team page is that here you have the option to exit this page instead of continuing through the rest of the set-up process. Click the “Exit” button to return to the My Home page.

- **Help**

This link brings you to the CUPSS Help module. This module allows you to search for information on specific help topics using a dynamic help interface.

- **Exit**

Use this menu option to exit CUPSS. This is the preferred method for exiting the application and ensures that all data is saved correctly. Avoid using the close window button (the one with the small “X”) at the upper right corner of the application window.

CUPSS MODULE BUTTONS

CUPSS is divided into modules, or areas of functionality. The CUPSS module buttons allow you to navigate to the various data entry and reporting modules that help you manage the assets, tasks and finances for the utility.

- **My Home**

The My Home module provides quick access to specific tasks within the other modules. It also has a calendar showing past due and scheduled tasks and a status window that gives a snapshot of task and asset status.

- **My Inventory**

This module allows you to identify and characterize your water system's assets. You can add and edit information for each asset to prioritize maintenance activities and better manage revenue for repair and replacement of assets.

- **My O&M**

This module allows you to create and track current, future and past operation and maintenance activities as scheduled and logged tasks. You can add tasks to the schedule and mark scheduled items as "completed", thus moving them to the log, and incorporate all routine tasks. This module records the status and history of each task, displays an alert if the task status is past due or critically past due, or if you should reassess the condition of an asset if maintenance is not performed as scheduled. The My O&M module will be described in greater detail in Session 2.

- **My Finances**

This module helps you determine the full costs of doing business and calculate how much is needed for full recovery. This knowledge gives you the ability to discuss your

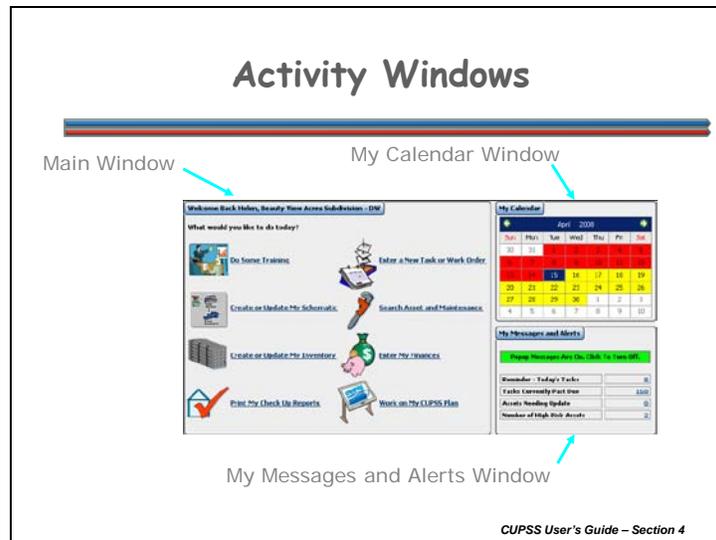
needs within the context of a community budget. You will be able to provide the current year's budget (at a minimum), what was actually spent (financial statement) from the previous year, and calculate the annual costs of asset rehabilitation and replacement. The My Finances module will be described in greater detail in Session 2.

- My Check Up

CUPSS generates two customizable reports: an “Asset Inventory Report” and “My Financial Statement.” You can use the options in this module to create targeted reports that will help you manage your assets and track your finances. We’ll talk about your Asset Inventory Report today.

- My CUPSS Plan

This module assembles, based on a predefined template, an asset management plan that has been pre-populated with the information and calculations entered in the other modules. This plan can be output as a Word document for modification and review. The My CUPSS Plan module will be described in greater detail in Session 3.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

The activity window is divided into three smaller windows.

MAIN WINDOW

The main window provides quick links to some of the CUPSS functions. These links are here to provide fast access to common tasks.

MY CALENDER WINDOW

The “My Calendar” window gives a snapshot of upcoming and overdue tasks for a particular month. The current day is shown in blue; days with overdue tasks are shown in red, and days with upcoming scheduled tasks are shown in yellow.

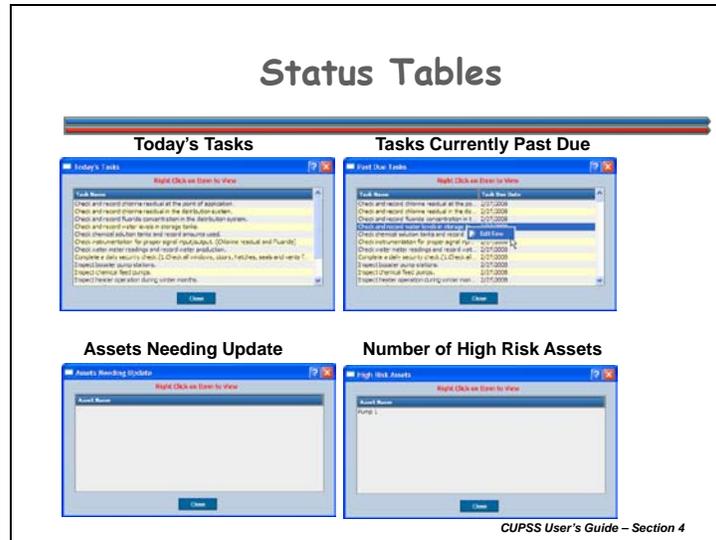
Use the arrow buttons to the left and right of the date to move forward and backward by one month at a time. To jump farther in time, click on either the date or year to navigate to a different month/year combination.

To view the activities scheduled for a given day, simply double-click on that day to open the My O&M module. Here you can view, edit and add tasks and work orders.

MY MESSAGES AND ALERTS

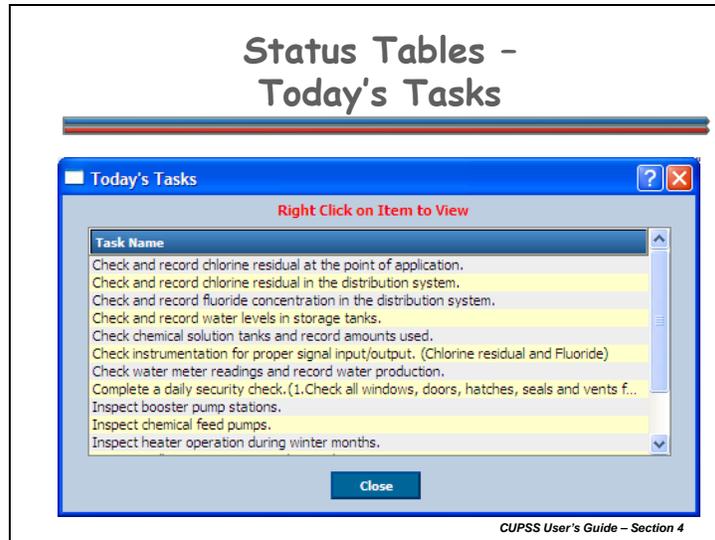
Use the “My Messages and Alerts” window to control whether popup alerts are used and to see what assets and tasks require your attention.

If you have popup messages turned on, you may see a popup window over the My Home page when you first log in (“On” is the default setting). This message box shows overdue tasks and a reminder of the current tasks for the day. To turn popup messages off, click the green box in the “My Messages and Alerts” window that reads “Popup Messages are On, Click To Turn Off.”. The message in the box will turn red and change to read “Popup Messages Are Off. Click to Turn On.”



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

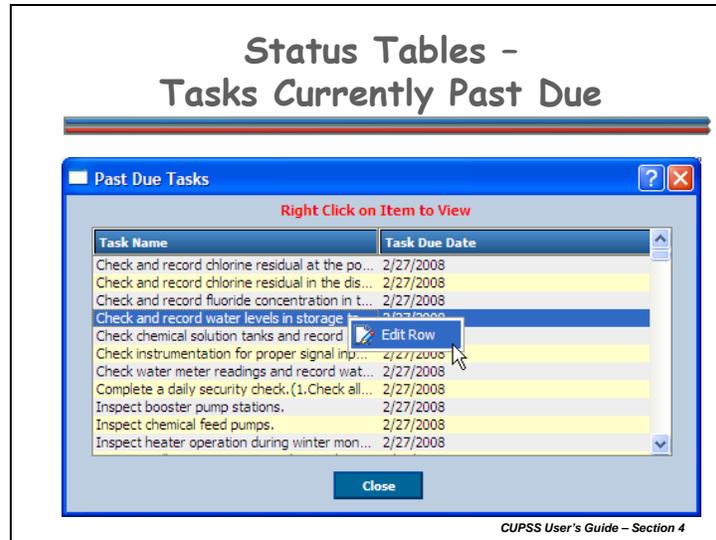
If you click on the links within the My Messages and Alerts window on the CUPSS homepage, you will see four Status tables. The status tables give a picture of the current state of your assets and tasks.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

TODAYS TASKS

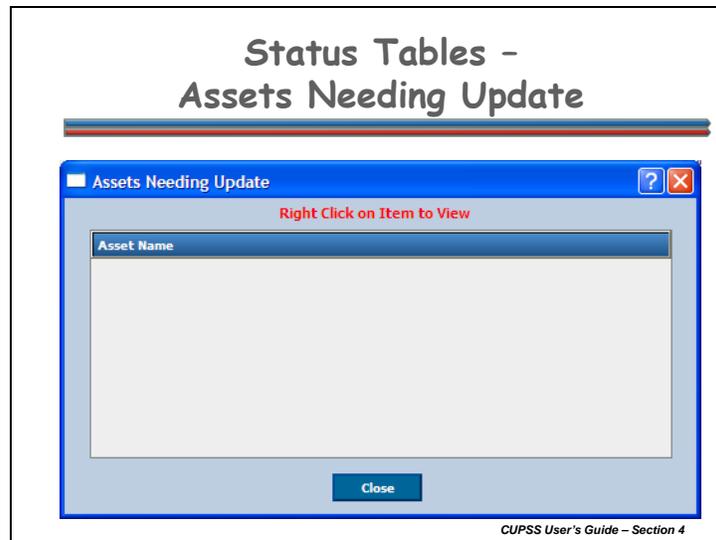
This number represents the number of tasks and work orders scheduled for the current day. Click on the number link to open a popup window that lists all tasks for the day.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

TASKS CURRENTLY PAST DUE

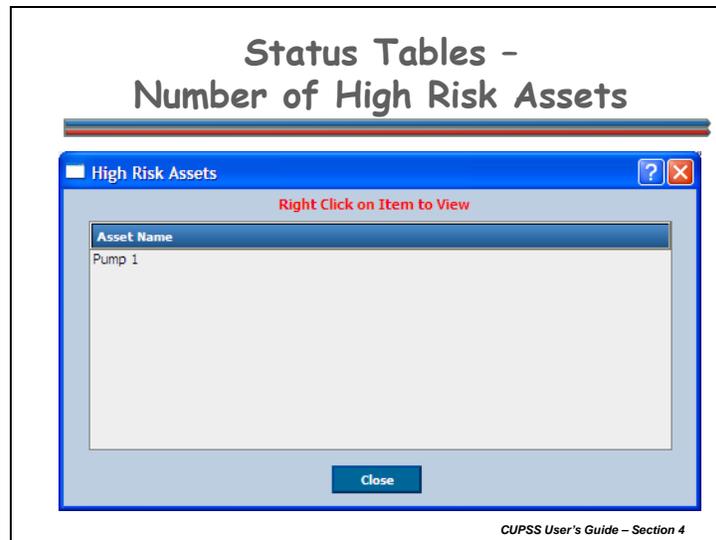
Past due tasks are those with dates earlier than the current date without a specified completion date. Click the number listed next to the "Tasks Currently Past Due" label to open a popup window that shows all overdue tasks. The popup window shows the task name and due date.



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

ASSETS NEEDING UPDATE

All assets that require updates are included in this window. Assets that need update are those assets that have associated tasks that are past due. It is important that as tasks are not completed on time that you update the condition of your asset based on the operation and maintenance tasks. The assets will require updating until the tasks associated with those assets are completed. This way you are able to better plan for assets that may fail earlier than expected due to improper maintenance.



CUPSS User's Guide – Section 4

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

NUMBER OF HIGH RISK ASSETS

This number shows high risk assets that could have a greater probability of failure if consequence of failure is greater than five.

Right-click on any of the assets in the window and click "Edit Row" to open the corresponding asset in the My Inventory module. Here, you can view and edit the asset details.

Click the "Close" button to close the popup window and return to the My Home page.

The screenshot shows a presentation slide with a black border. At the top, the title "What Are We Learning?" is centered in a bold, dark grey font. Below the title is a decorative horizontal bar consisting of three parallel lines in blue, red, and blue. In the center of the slide, the text "Part 6: CUPSS Resources" is displayed in a grey font. Below this, there is a rectangular text box with a black border containing the following text: "Benefits to My Utility" in bold, followed by "CUPSS provides step by step instructions on how to use every aspect of the application." in a smaller font. In the bottom right corner of the slide, there is a small blue button with the text "Main Menu" in white.

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

For Part 6 of this lesson, we will learn of all the CUPSS resources available to trainers and users.. The theme for Part 6 is, "CUPSS Resources".

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**

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

An important feature within the CUPSS application is that an example drinking water utility and an example wastewater utility are included. These are real utilities that are using CUPSS. Beauty View Acres is a subdivision in Franklin County, Missouri with a population of about 75 people. Data has been added to each module to be used as a helpful tool in case you don't know what to enter, or where to enter your own information.

This is Joe from Beauty View Acres. Hi Joe! We would like to thank him and all others who helped gather the data to be used as example projects in the CUPSS application.

The exercises that we perform today and in Sessions 2 and 3 will reference this information in Beauty View Acres.

CUPSS Website

www.epa.gov/cupss

- Basic Information
- Frequent Questions
- Case Studies
- Resources
- Training Events
- CUPSS Glossary



The screenshot shows the CUPSS website interface. It features a navigation menu on the left with icons for 'Check Up', 'Check Down', 'Check Up', 'Check Down', 'Check Up', and 'Check Down'. The main content area includes a 'Check Up Program for Smart Systems' header, a 'Check Up Program for Smart Systems' table, and a 'Check Up Program for Smart Systems' table. The table has columns for 'Check Up Program for Smart Systems' and 'Check Up Program for Smart Systems'. The table contains data for 'Check Up Program for Smart Systems' and 'Check Up Program for Smart Systems'.

Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

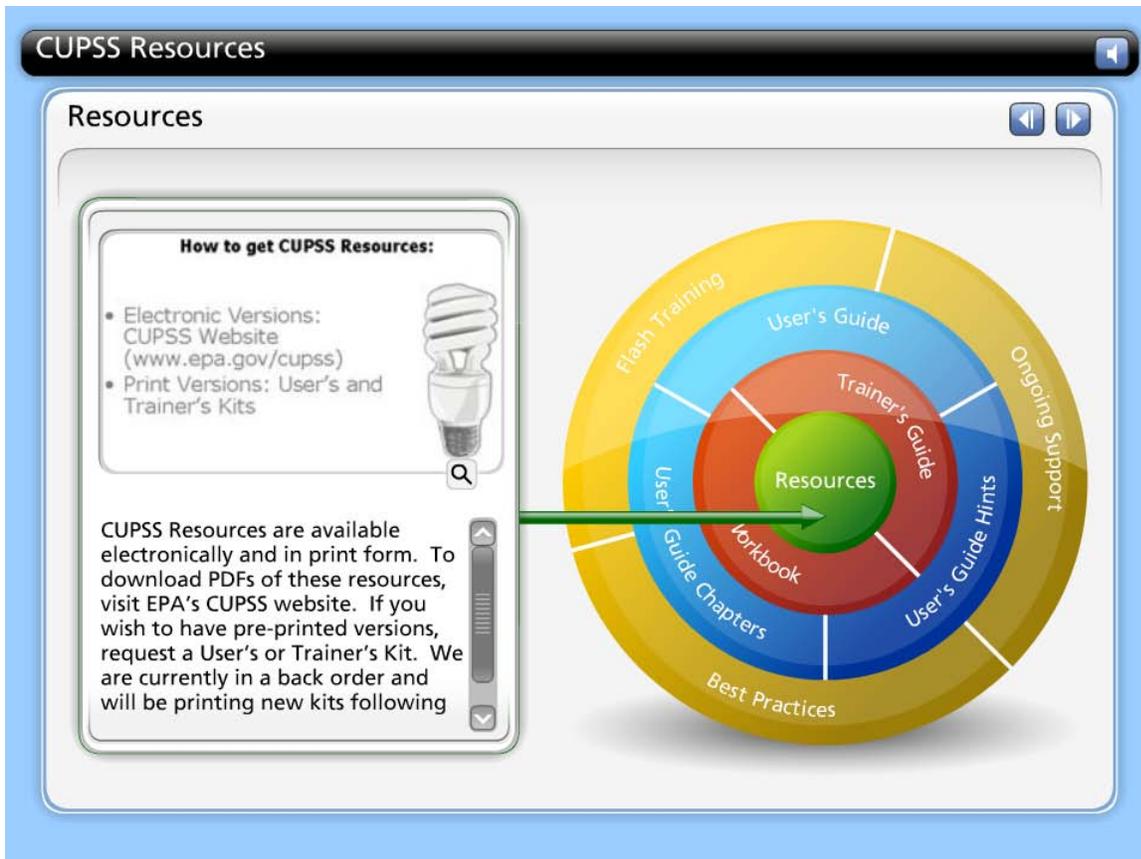
The CUPSS website will be the source of the latest data. The frequent questions and training events will be updated the most often, so check them often.

You can also download copies of the resources to help you better understand asset management and CUPSS.

Slide 41



Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. Click on the sections of the target or on the arrows at the top of the slide to navigate through the information. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.



CUPSS Resources

Now that you've seen a glimpse of what CUPSS can do for you, we'll go over some materials to help you do it.

CUPSS Resources are available electronically and in print form. To download PDFs of these resources, visit EPA's CUPSS website. If you wish to have pre-printed versions, request a User's or Trainer's Kit. We are currently in a back order and will be printing new kits following the summer updates to the user's guide.

CUPSS Resources

Workbook

One of the first resources that you should look at before using CUPSS is the "Getting Started with CUPSS Workbook". This workbook provides steps to get you started in using CUPSS to implement asset management. The workbook is also

Getting Started with CUPSS Workbook

Provides steps to get you started in implementing asset management:

- Team building
- Printable forms:
 - Inventory List (Drinking Water and Wastewater)
 - New Task
 - Finances

Resources

Trainer's Guide

User's Guide

Flash Training

Ongoing Support

User's Guide Hints

Best Practices

User's Guide Chapters

Getting Started with CUPSS Workbook

One of the first resources that you should look at before using CUPSS is the "Getting Started with CUPSS Workbook". This workbook provides steps to get you started in using CUPSS to implement asset management. The workbook is also a good resource in understanding the importance of team building. In addition, it provides printable forms that are very similar to the forms used in CUPSS – this way you can get started with writing down what you already know you have.

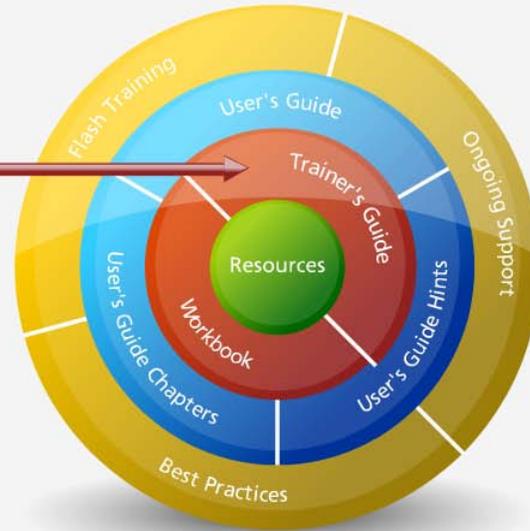
Trainer's Guide

The CUPSS Trainer's Guide is for, well, trainers! It is designed to educate trainers on possible marketing strategies and techniques to use to gain buy-in from decision makers and stakeholders on the adoption of

CUPSS Trainer's Guide

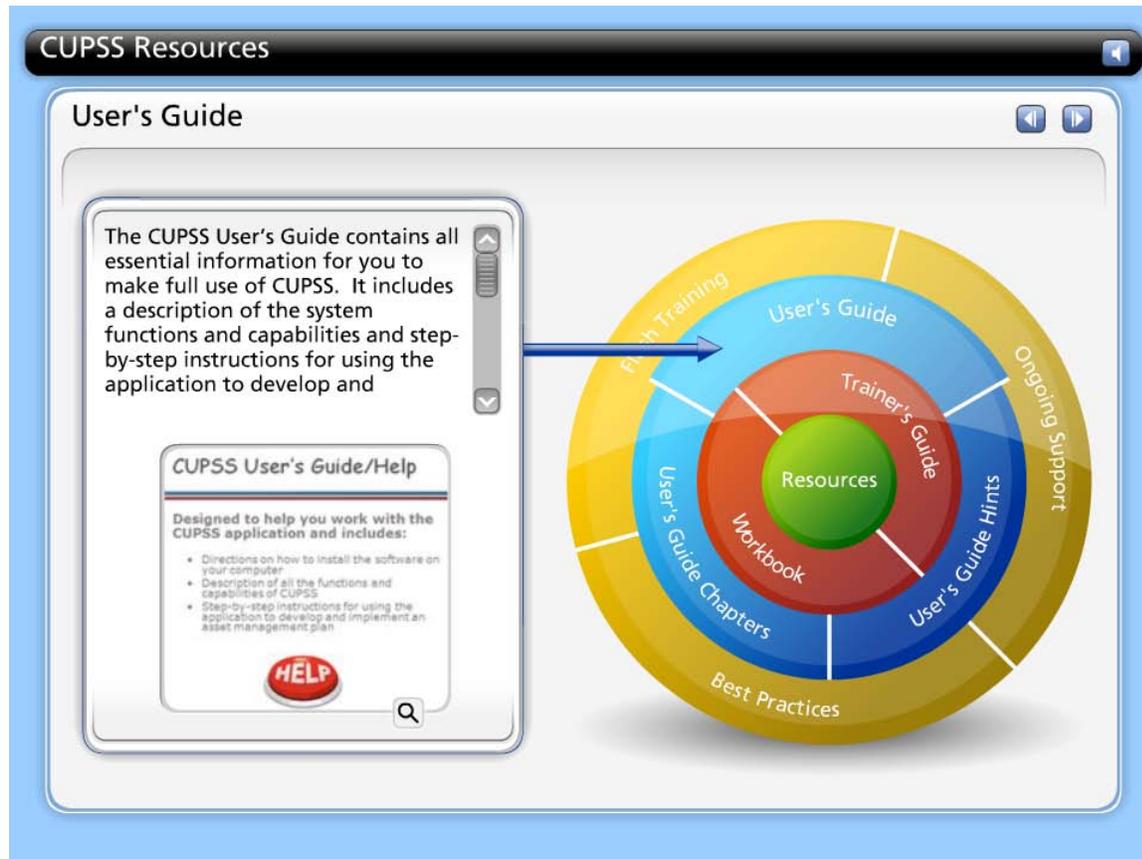
Educates trainers how to successfully introduce the CUPSS Tool

- Presents tips and techniques for
 - training preparation
 - marketing strategies



CUPSS Trainer's Guide

The CUPSS Trainer's Guide is for, well, trainers! It is designed to educate trainers on possible marketing strategies and techniques to use to gain buy-in from decision makers and stakeholders on the adoption of CUPSS and educate trainers on the key features and benefits of CUPSS to potential users.



CUPSS User's Guide / Help

The CUPSS User's Guide contains all essential information for you to make full use of CUPSS. It includes a description of the system functions and capabilities and step-by-step instructions for using the application to develop and implement an asset management plan.

If you have a question on how to use the different features of CUPSS, check the User's Guide first. Look for the Troubleshooting appendix and the call out boxes throughout the guide.

You don't have to have a copy of the User's Guide laying around at all times. This User's Guide is also available as a fully indexed guide in the CUPSS application. You can access this by clicking on the Help link.

CUPSS Resources

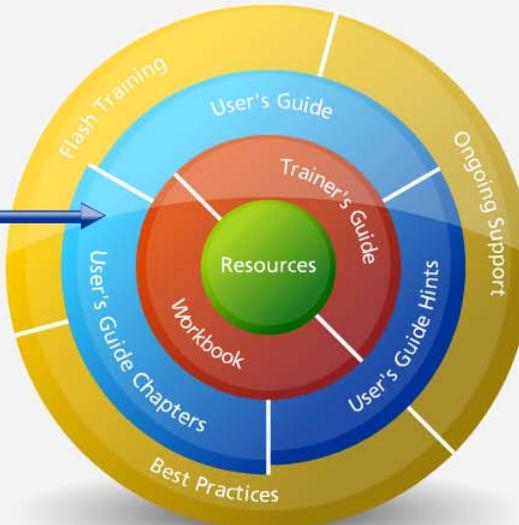
User's Guide Chapters

People often ignore the user's guide. You do not need to read it word for word, but it is useful to skim through it. If you run into a problem or have some confusion about a particular topic, such as My Finances, then please read that



Specific Instructions

- Chapter 2 – Installation Instructions
- Chapter 5 – Create or Edit My Schematic
- Chapter 9 – Begin a New My CUPSS Plan
- Appendix A – Database Backup and Restore Procedures



The diagram shows a central green circle labeled 'Resources' surrounded by concentric rings. The innermost ring contains 'Trainer's Guide', 'User's Guide Chapters', and 'User's Guide Hints'. The middle ring contains 'User's Guide', 'Workbook', and 'User's Guide Hints'. The outermost ring contains 'Flash Training', 'Ongoing Support', and 'Best Practices'. An arrow points from the text area to the 'User's Guide Chapters' section of the diagram.

User's Guide Chapters

People often ignore the user's guide. You do not need to read it word for word, but it is useful to skim through it. If you run into a problem or have some confusion about a particular topic, such as My Finances, then please read that chapter or section carefully.

Don't forget the Appendices. Appendix A on backing up and restoring the CUPSS database is particularly important.

CUPSS Resources

User's Guide Hints

Helpful Hints appear throughout the User's Guide. These are blocked out and labeled "Benefits to My Utility".

There are two examples above. The first is rather lengthy while the second is short and sweet.

User's Guide Helpful Hints

Helpful Hints labeled 'Benefits to My Utility'

<p>Benefits to My Utility CUPSS allows you to track all of the tasks associated with each ability. Since CUPSS allows several users to use CUPSS so everyone can manage their tasks in CUPSS. Using the search module in CUPSS you can then extract all of the task information to help develop the CMI section of the My CUPSS Asset Management Plan.</p>	<p>Benefits to My Utility CUPSS data provide you with a quick summary of the financial health of your utility.</p>
---	---

User's Guide Helpful Hints

Helpful Hints appear throughout the User's Guide. These are blocked out and labeled "Benefits to My Utility".

There are two examples above. The first is rather lengthy while the second is short and sweet.

CUPSS Resources

Best Practices

EPA recently developed a short best practices guide and two accompanying fact sheets to help in implementing asset management. This guide will help you understand what asset management means, what the benefits and best practices

Best Practices Guide and Fact Sheets

Flash Training

User's Guide

Trainer's Guide

Ongoing Support

Resources

User's Guide Chapters

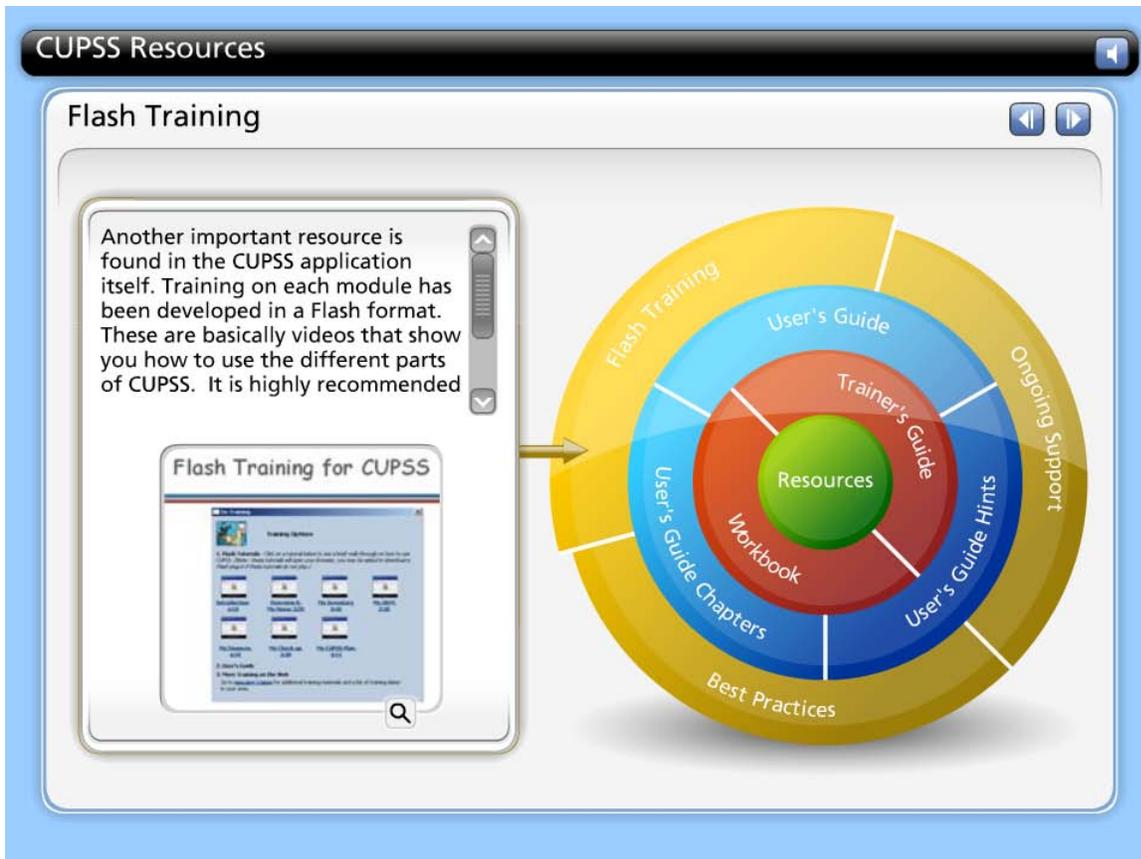
User's Guide Hints

Workbook

Best Practices

Best Practices Guide and Fact Sheets

EPA recently developed a short best practices guide and two accompanying fact sheets to help in implementing asset management. This guide will help you understand what asset management means, what the benefits and best practices are and how to implement an asset management plan. The fact sheets focus on local officials' vital role in successfully implementing an asset management program and how forming and having a team can help your system successfully implement asset management.



Flash Training for CUPSS

Another important resource is found in the CUPSS application itself. Training on each module has been developed in a Flash format. These are basically videos that show you how to use the different parts of CUPSS. It is highly recommended that you view these videos before working on a module. You can access these training videos by clicking on the Training link when the CUPSS application is open.

The image shows a screenshot of a web browser window titled "CUPSS Resources". Inside the window, there is a section titled "Ongoing Support". On the left, a text box contains the following text: "There are also resources available on the internet. As I mentioned before, CUPSS has a website that contains all of these resources as well as additional information such as Training Events, like this one!". Below this text is a smaller window titled "Ongoing Support" which lists the following resources:

- CUPSS Website
 - www.epa.gov/cupss
- CUPSS Email
 - cupss@epa.gov
- Listservs
 - User's
 - Trainer's

On the right side of the "Ongoing Support" section is a circular diagram with a central green circle labeled "Resources". Surrounding this center are several concentric rings and segments, each representing a different resource category: "User's Guide", "Trainer's Guide", "User's Guide Chapters", "User's Guide Hints", "Best Practices", "Flash Training", and "Ongoing Support". An arrow points from the text box on the left towards the circular diagram.

Ongoing Support

There are also resources available on the internet. As I mentioned before, CUPSS has a website that contains all of these resources as well as additional information such as Training Events, like this one!

If you have any questions where the answers can't be found in the User's Guide, email cupss@epa.gov and a CUPSS expert will get back to you.

There are also two listservs that you can sign up for to receive ongoing information about CUPSS. The User's listserv provides tips and lessons learned and the Trainer's listserv is used for networking among trainers.

Help



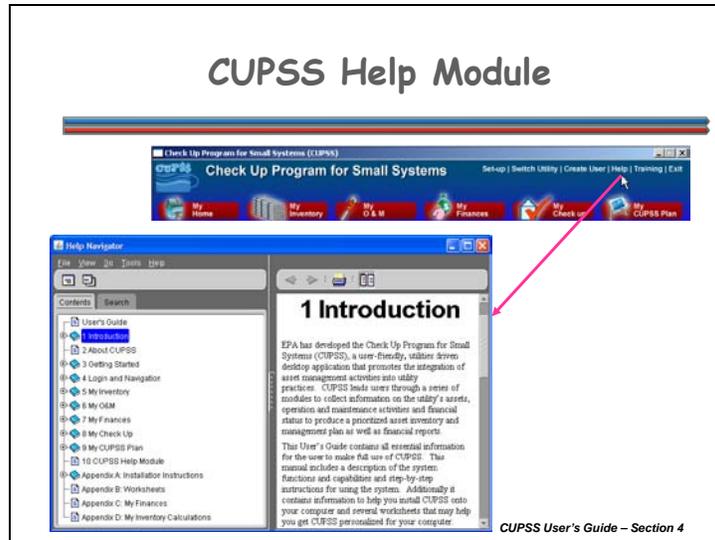
In the Help module, we will be discussing:

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

CUPSS User's Guide – Section 4

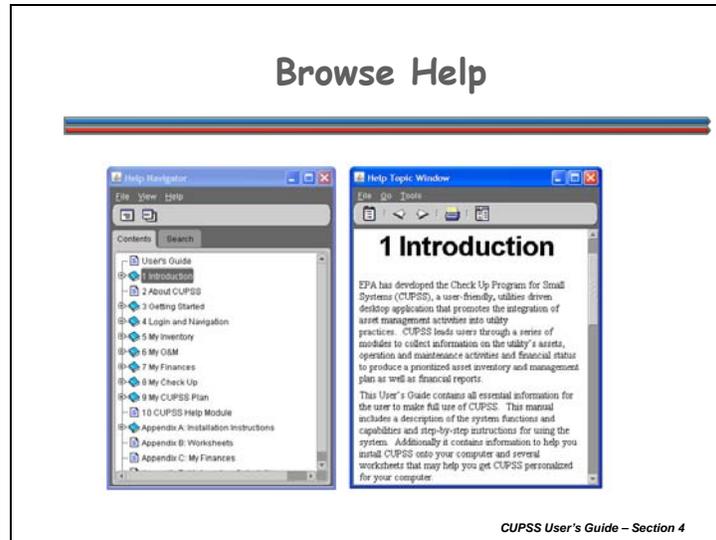
Navigation: Use the arrows in the bottom-middle of the screen to navigate backward to previous screens or forward through the lesson screens. When you enter an interactive tool, check the notes to receive instruction on using that tool's navigation. If you do not want to hear the audio, set the sound scale on the bottom left to zero or mute the computer's sound.

The help module contains a bookmarked version of the User's Guide. You can browse the User's Guide by chapters or you can search for specific words or phrases in the User's Guide.



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The CUPSS Help module is accessible from the Administration menu at the upper right corner of the navigation area window. Click the "Help" link to open the Help module.



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By default, the Help Navigator and Help Topic Window are shown in a single window. To view each as a separate window, click the "Undock" button. This changes the structure of the toolbars and allows each side to be manipulated separately. Click the button again to reconnect the two windows.

The two primary methods for finding information using the Help Navigator are browsing the help contents and searching for specific help topics. Each task is performed using the tabs in the Help Navigator window.

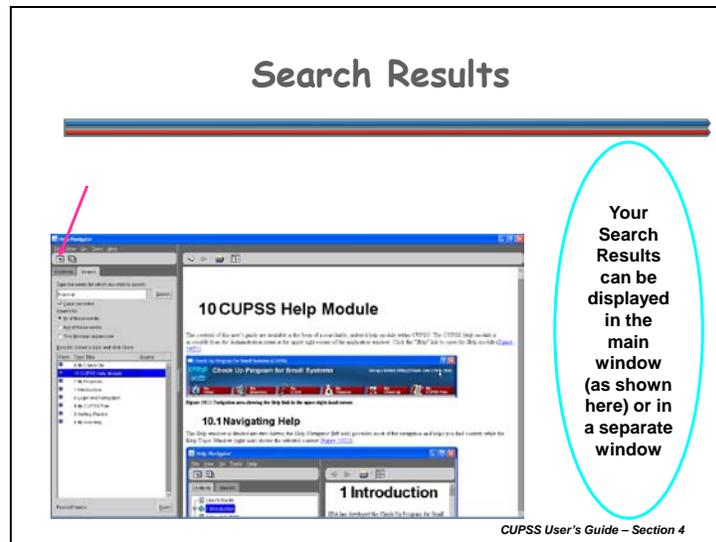
BROWSE HELP CONTENTS

Each chapter and sub-heading in the User's Guide is shown in the Contents tab of the Help Navigator window.

To view chapter sub-headings, click the "+" (plus) icon next to the chapter name, this expands the entry to show all sub-headings. As you can see here, Chapter 1: Introduction, has been expanded to show all sub-headings. To view the text for a chapter or sub-heading, double-click its name within the Contents tab or select

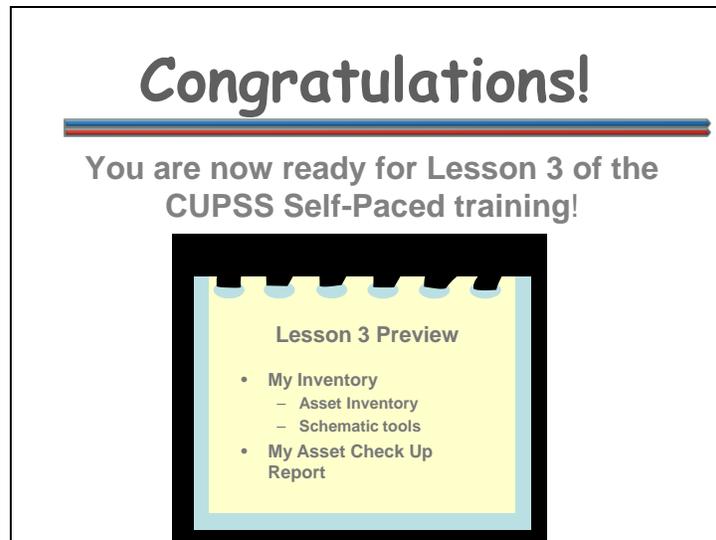
File>>Display, from the File menu at the top of the Help Navigator window. This will open the topic text in the Help Topic window on the right.

click once on the topic or chapter and click the “Open” button to view the text in the Help Topic Window.



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To see your search results in the main window, click on this button on the left.



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Congratulations! You have completed Lesson 2 and are now ready for Lesson 3 of the CUPSS Self-Paced training!

Lesson 3 includes:

- My Inventory
 - Asset Inventory
 - Schematic tools
- My Asset Check Up Report

For More CUPSS Information

- Email us at:
 - cupss@epa.gov

- Visit the CUPSS website at:
 - www.epa.gov/cupss



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