CUPSS Training

Part 1 of 3 Sessions

www.epa.gov/cupss

cupss@epa.gov

Helpful Tips for Today's Session

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

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

Cisco webex

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

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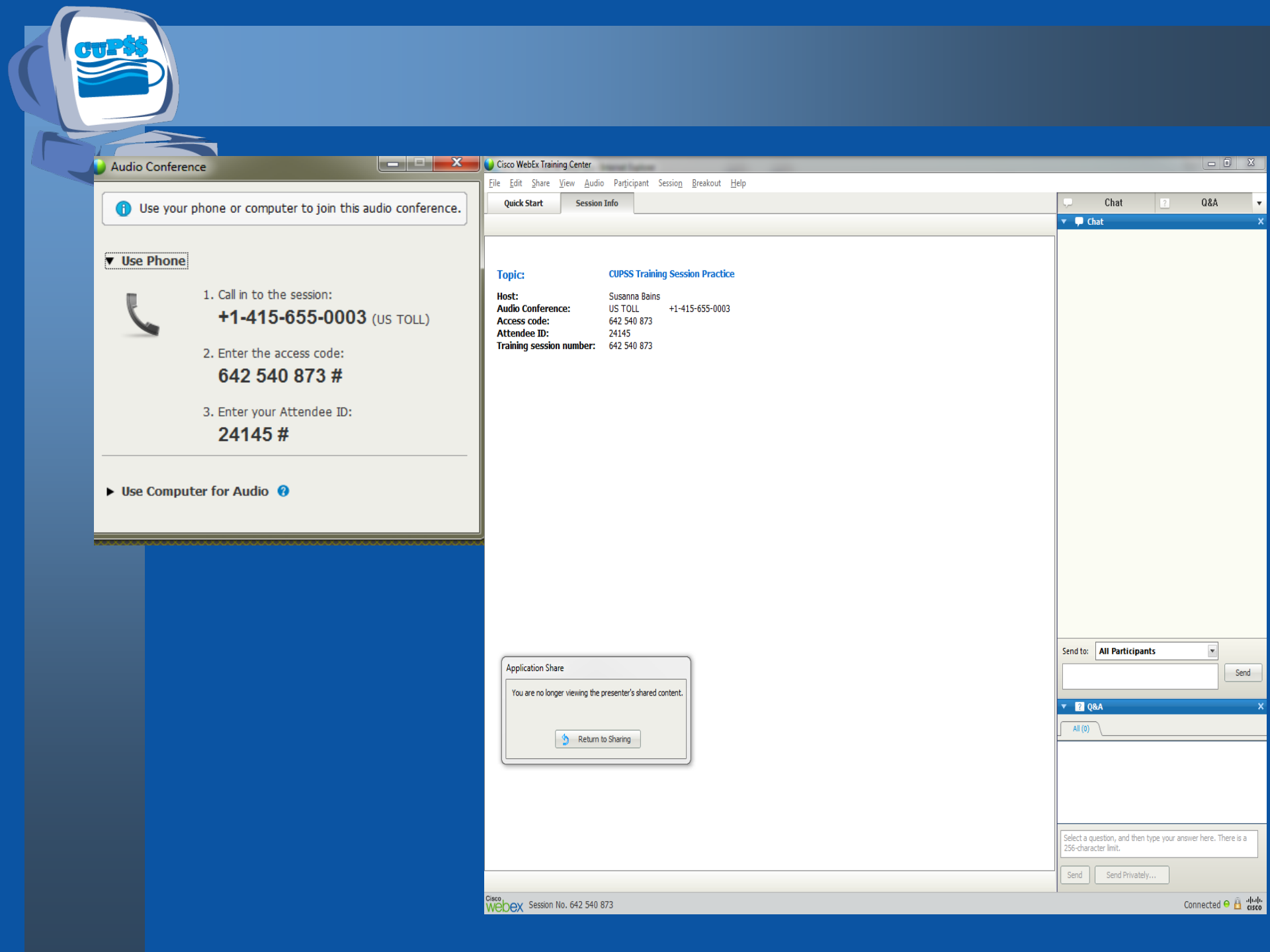
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CUPSS Training Session Practice
Host:
Susanna Bains
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Select a question, and then type your answer here. There is a 256-character limit.
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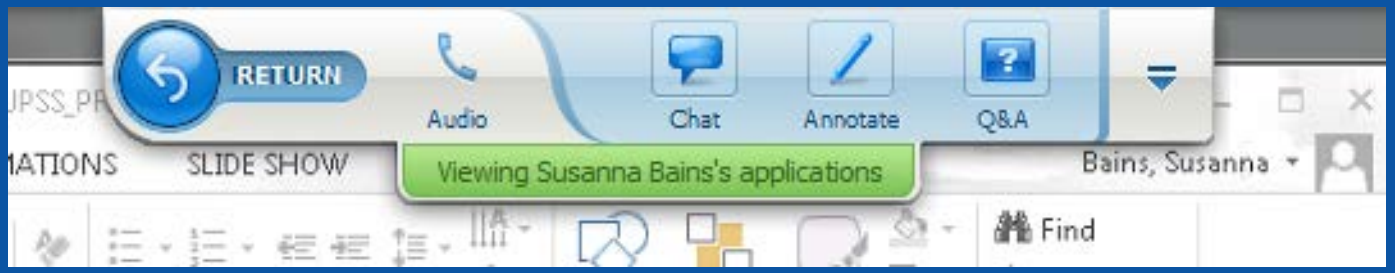

RETURN
Audio
Chat
Annotate
Q&A
SLIDE SHOW
Viewing Susanna Bains's applications
Bains, Susanna
Find

Today's Panel

CUPSS Program Team

Susanna Bains, ORISE Fellow, USEPA

Adrienne Harris, USEPA

Cindi Atwood, TetraTech

Structure for CUPSS Training

3 training sessions

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

Today's Agenda

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

Goals of Session 1

1

Prepare to use CUPSS

2

Download and install CUPSS

3

Set-up the utility's basic information

4

Login and navigate CUPSS

5

Create the asset inventory

6

Create a customized asset report

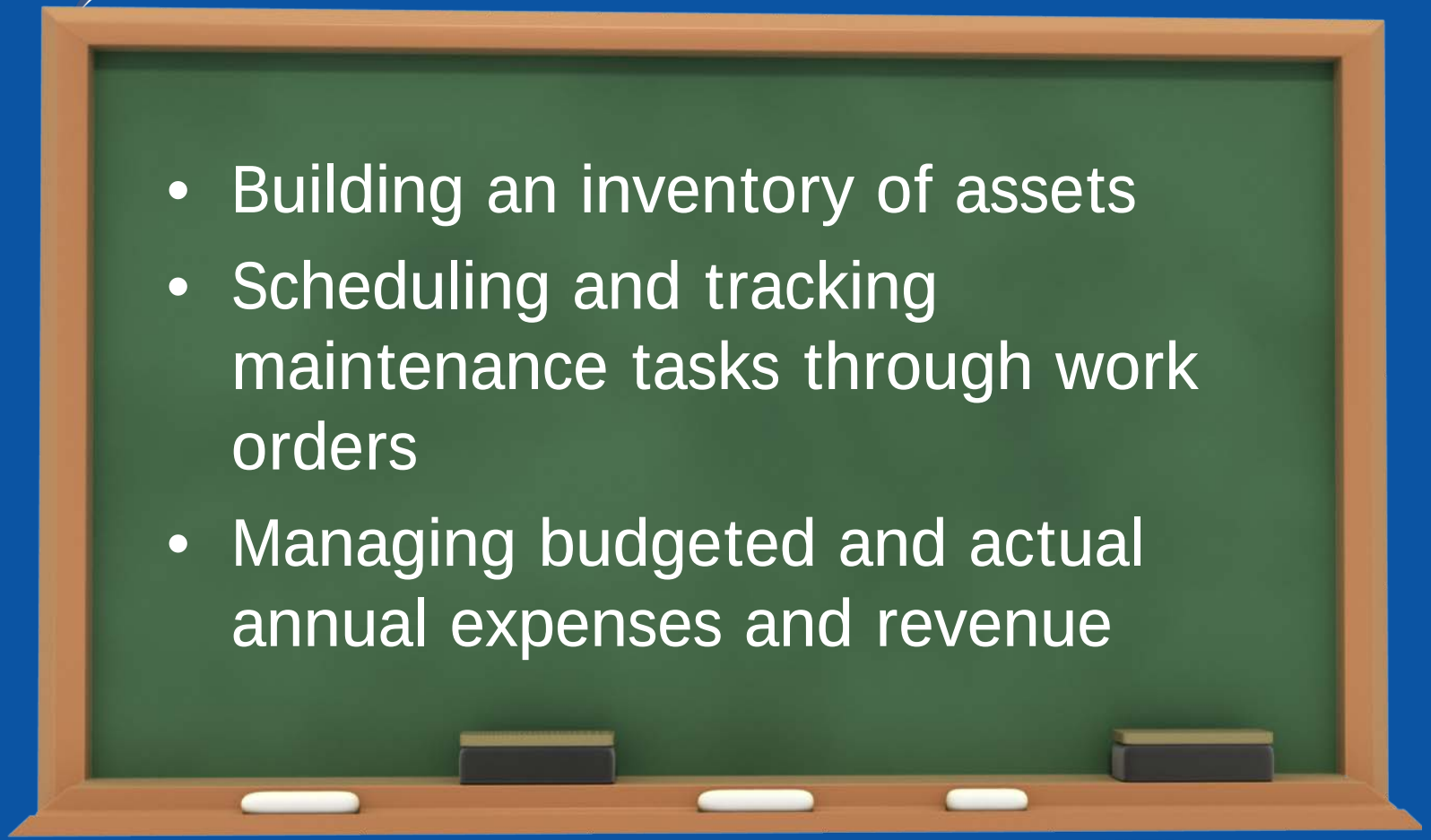
Prepare to Use CUPSS

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

Asset Management is…

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

Asset Management includes….



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

Asset Management will…

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

Give utilities the basis to make good decisions

Benefits of Asset Management

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

Asset Management Core Questions

1. What Is The Current State Of The Utility's Assets?
2. What Is The Utility's Required Sustained Level Of Service (LOS)?
3. Which Assets Are Critical To Sustained Performance?
4. What Are The Utility's Best Capital Improvement Project (CIP) and O&M Strategies?
5. What Is The Utility's Best Long-term Financing Strategy?

Asset Management Core Question
Question 1 of 5

1

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

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

Asset Management Core Question
Question 2 of 5

2

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

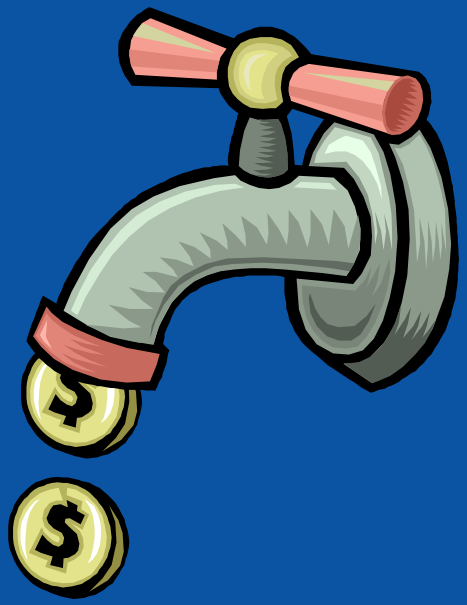
- What do the regulators require?
- What are the utility's performance goals?
- What LOS do the customers demand?
- What are the physical capabilities of the assets?

Asset Management Core Question
Question 3 of 5

3

Which Assets Are Critical To Sustained Performance?

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



Asset Management Core Question
Question 4 of 5

4

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

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

Asset Management Core Question
Question 5 of 5

5

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

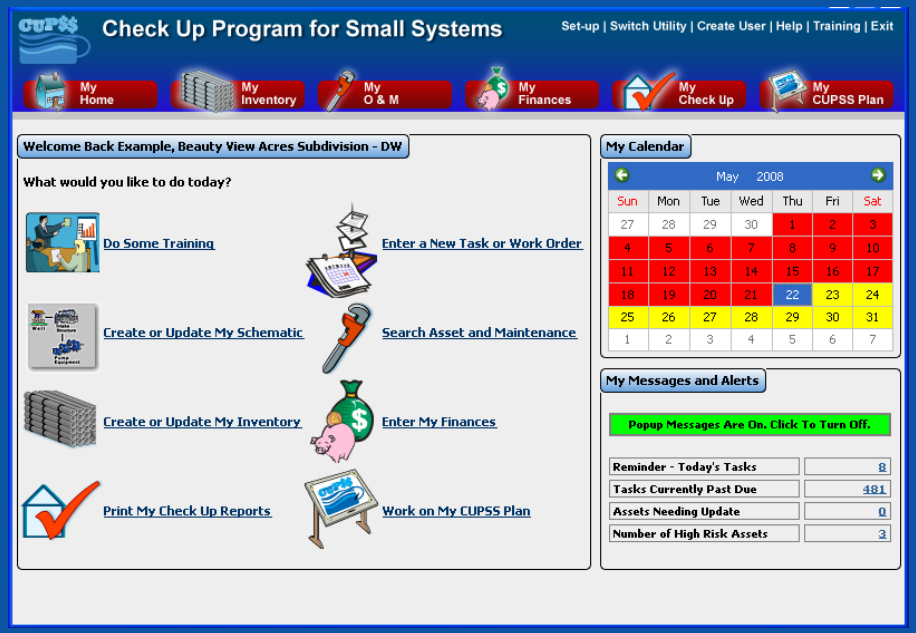
- Do we have enough funding to maintain our assets for our required level of service?
- Is our rate structure sustainable for our system's long-term needs?

Develop an Asset Management Plan

Develop basic Asset Management plans based on:

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

Introduction to CUPSS



- Free Asset Management tool
- Tool developed in partnership with trainers like you

- 'Desktop software' – program that runs on your computer
- Series of modules that store information about a user's utility

Asset Management Core Questions

CUPSS Modules

1 Current State of Assets

- My Inventory
- My O&M
- My CUPSS Plan

2 Level of Service

- My CUPSS Plan

3 Critical Assets

- My Inventory
- My Asset Check Up
- My CUPSS Plan

4 Minimum Life Cycle Cost

- My Finances
- My O&M
- My Financial Check Up
- My CUPSS Plan

5 Long-term Funding Plan

- My Finances
- My Financial Check Up
- My CUPSS Plan

Asset Management

CUPSS User's Guide / Help

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

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

Best Practices Guide and Fact Sheets

EPA United States Environmental Protection Agency

Asset Management for Local Officials

This guide will help you understand:

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

This fact sheet is intended for local officials, owners and operators of pub
state personnel.

Asset Management

Asset management is maintaining a desired level of service, that is, what y
cycle cost. This means the best appropriate cost – not without cost. Publi

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

Asset management requires:

- Support and involvement of local officials who have the authorit
  personnel to maintain community assets.
- A commitment of time and money to make cost-effective asset d
  save more money over the long-term).
- A team made up of key decision makers.

Improving Service and Maintaining Infrastructure Through

A sustainable water service delivers safe, clean water to its customers' sati
maximize their useful life. An asset management program will help you "
understandable. Small systems that have simple asset management plans
complex plans. Asset management will enable your system to:

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

The Five Core Questions of Asset Management

A good starting point for any system are five core questions, which walk
asset management.

1. What is the current state of my assets?
   Your water infrastructure assets are part of your community's to
   infrastructure indicates insufficient funding of asset management
2. What is my desired "sustainable" level of service?
   Your desired sustainable level of service is the set of features tha
   desired level of service is the basis for justifying your user rates.
3. Which assets are critical to sustained performance?
   Identifying critical assets will help you make decisions about reso
   your sustainable level of service.

EPA United States Environmental Protection Agency

Asset Management: A Best Practices Guide

Introduction

Purpose	This guide will help you understand: • What asset management means. • The benefits of asset management. • Best practices in asset management. • How to implement an asset management plan.
Target Audience	This guide is intended for owners, managers, and operators of public water systems, local officials, technical assistance providers, and state personnel.

Asset Management

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

Challenges faced by Public Water Systems	Benefits of Asset Management
• Aging assets. • Increasing demand for services. • Resistance to rate increases. • Diminishing resources. • Determining the best (or optimal) time to repair, replace, or renew assets. • Rising service expectations of customers. • Increasingly stringent regulatory requirements.	• Budgets focused on activities critical to sustained performance. • Financial management and rates based on sound operational information. • Efficient and focused operations and maintenance to prolong asset life and aid repair/replace decisions. • Ability to meet consumer demands with a focus on system sustainability. • Improved response to emergencies. • Security and safety of assets improved.

Implementing Asset Management: Five Core Questions Framework

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

EPA

Building an Asset Management Team

derstand:

elp your system successfully implement asset management.

of a successful asset management team.

for local officials, owners and operators of public water systems, technical assistance providers, and

nent

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

oney to implement the program.

cost-effective asset decisions.

ble level of service for the community.

mmitment, asset management is implemented by a team that is:

tical leaders who have the authority and willingness to commit public resources and personnel.

cision makers who represent the departments involved with asset management.

ning an Asset Management Culture

differently can be the first step towards having a sustainable water system. With the limited shifting away from reacting to events and towards making strategic plans can lead to real savings. move beyond an unsophisticated pipe-replacement plan based on a simple formula that does not g., replace 5 percent per year). The asset management model focuses on the long-term life cycle of erformance, not on the day-to-day aspects of the asset. It involves a shift in a water system's aracterized by:

em's business environment.

t all asset decisions are investment decisions.

ual improvement driven by results (sustainability).

es a champion to promote and articulate the benefits of asset management to decision makers, es. The champion can be an operator, manager, elected official, or stakeholder who coordinates the plements the asset management program.

cessful Asset Management Team

uthority and resources to answer the core questions that lead to asset investment decisions. An

ourages critical thinking.

ties for sharing ideas and information through open and transparent debate.

oblems and shares the success, not the blame.

here that builds trust and develops partnerships.

ents of asset management as a basis for the program.

tion during planning to achieve early gains.

Ongoing Support

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

Example CUPSS - Beauty View Acres

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

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

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

INSTALLATION WIZARD

Benefits to My Utility

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

Why Install CUPSS?

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

Basic Computer Requirements

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

CUPSS Software

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

Poll Question

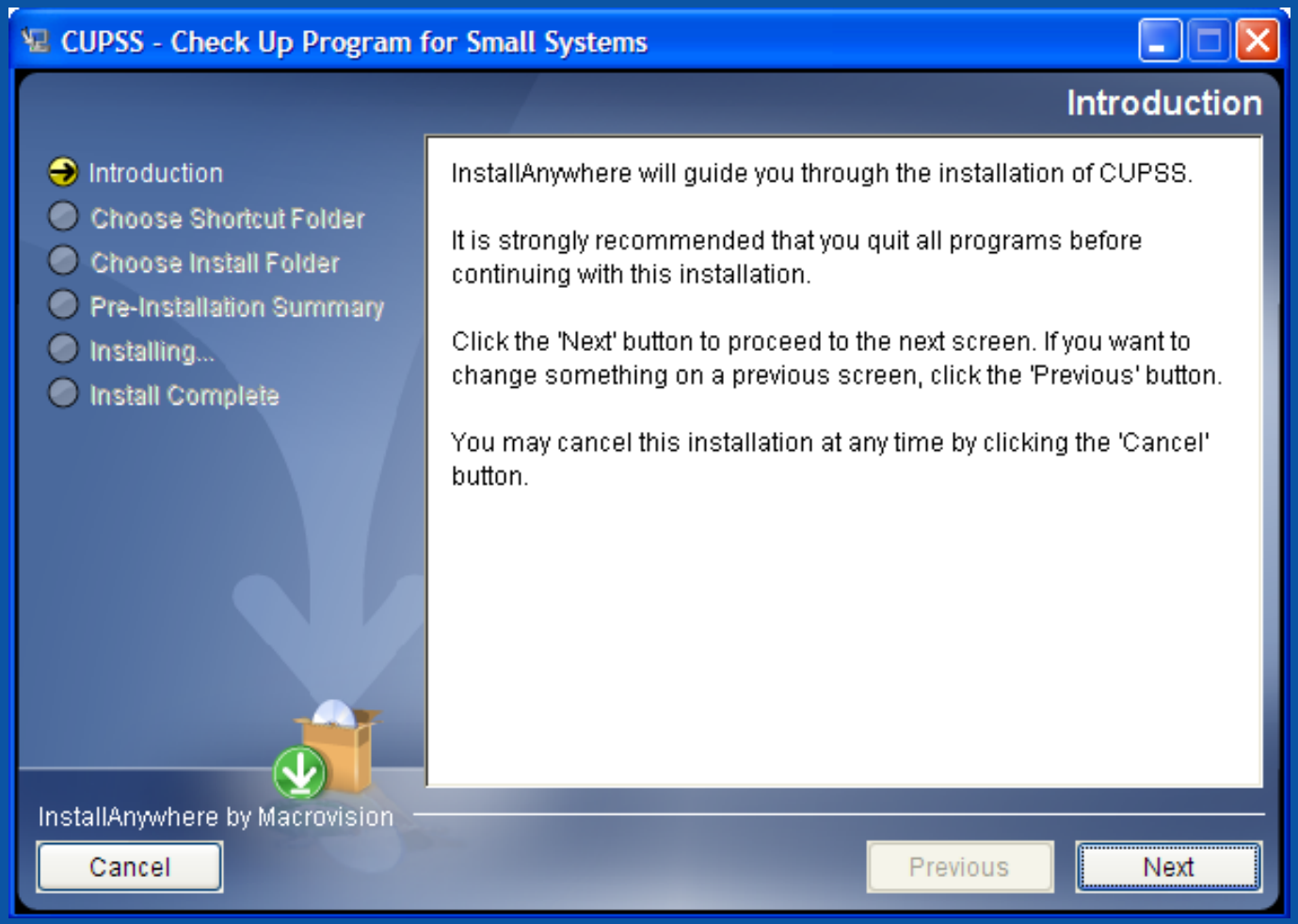
Have you installed CUPSS on your personal computer?

A. Yes

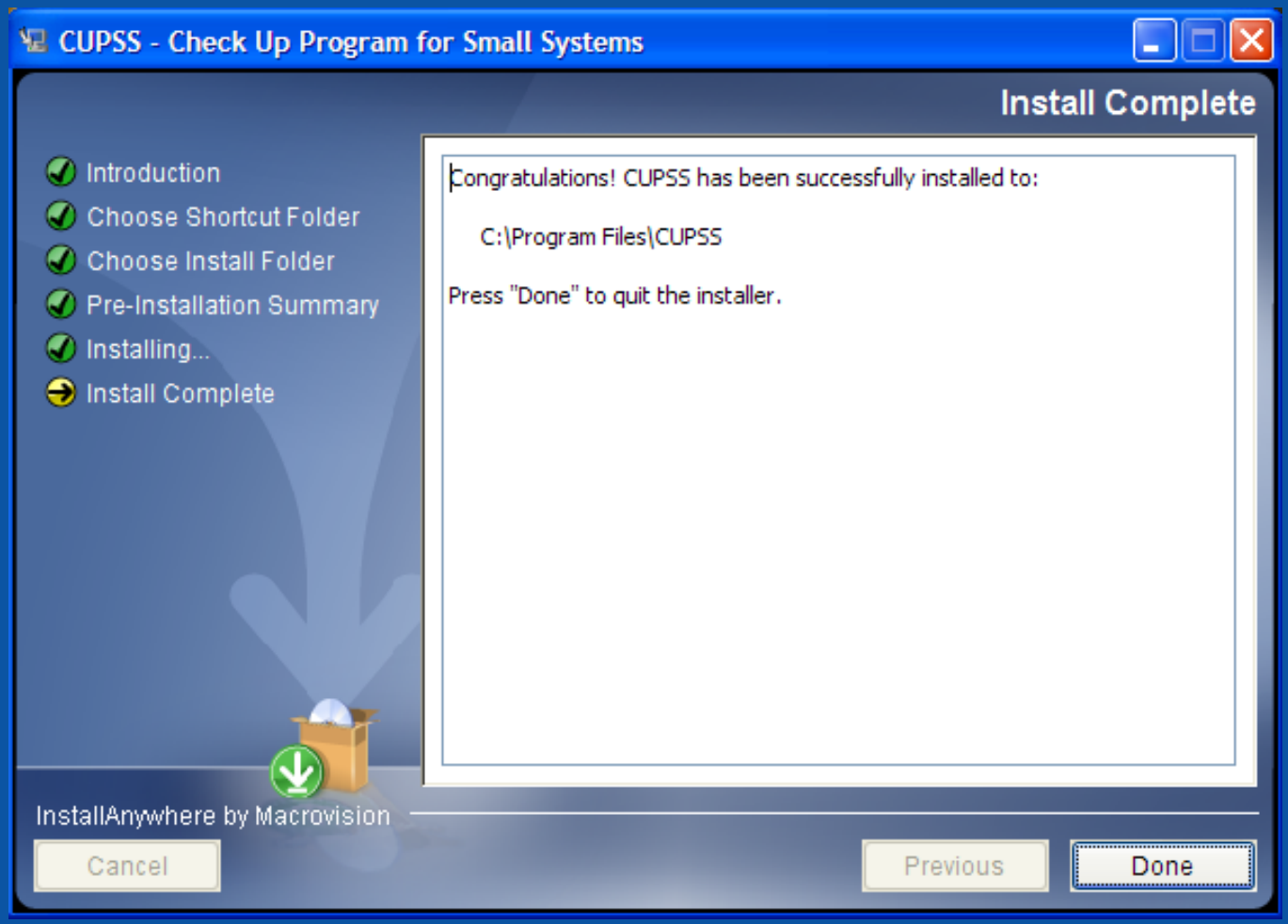
B. No

C. I’m installing right now

Installation Wizard



Installation Wizard



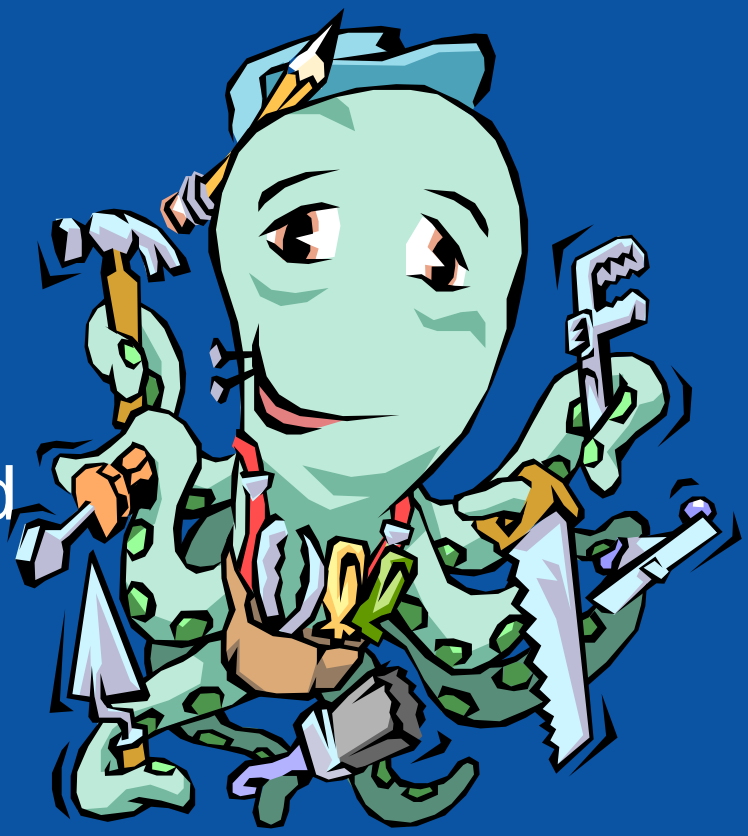
SETTING UP CUPSS

Benefits to My Utility

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

Why Set Up CUPSS?

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

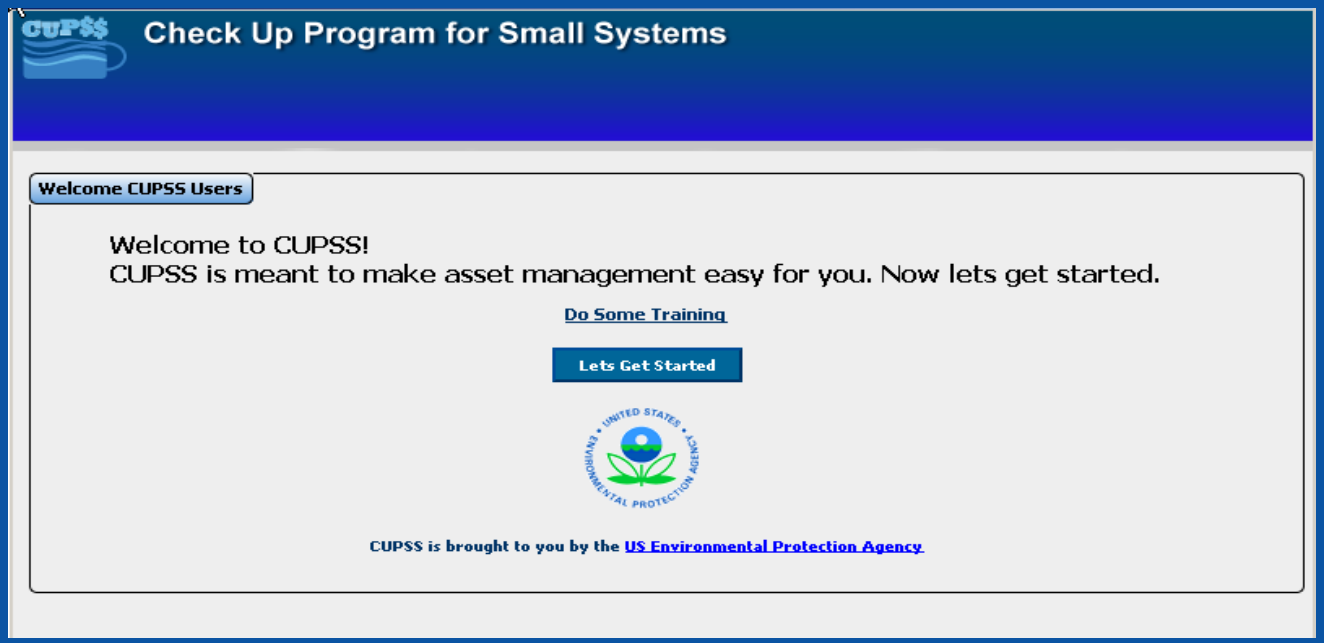


Think about the Asset Management Plan

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

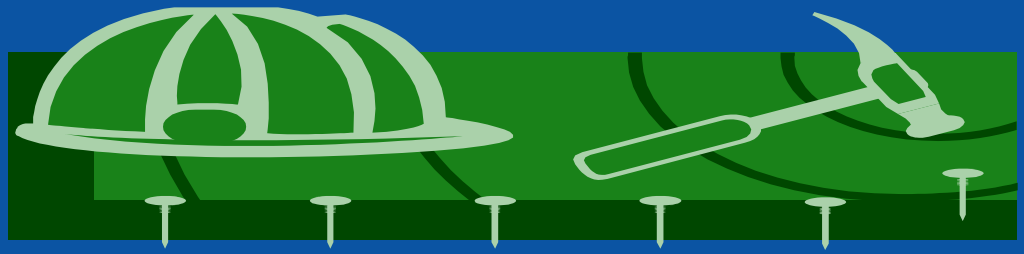
Welcome Screen

CUPSS Start Up



Get Started Using CUPSS

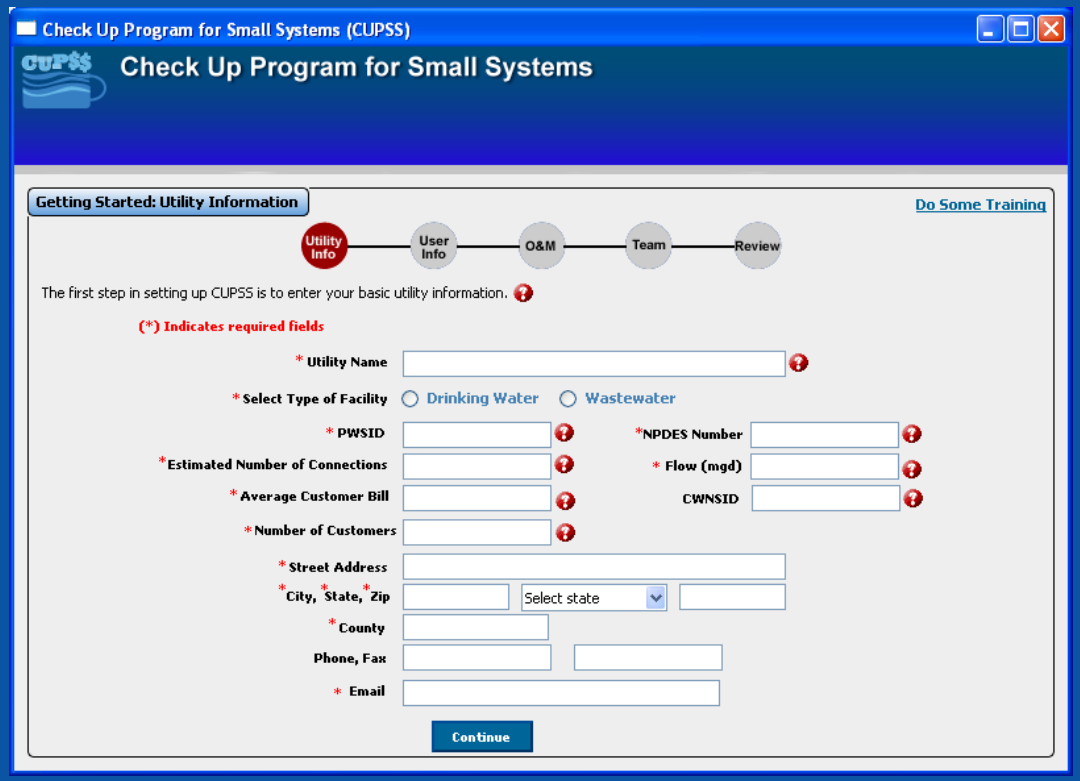
There are five steps in the Getting Started module:



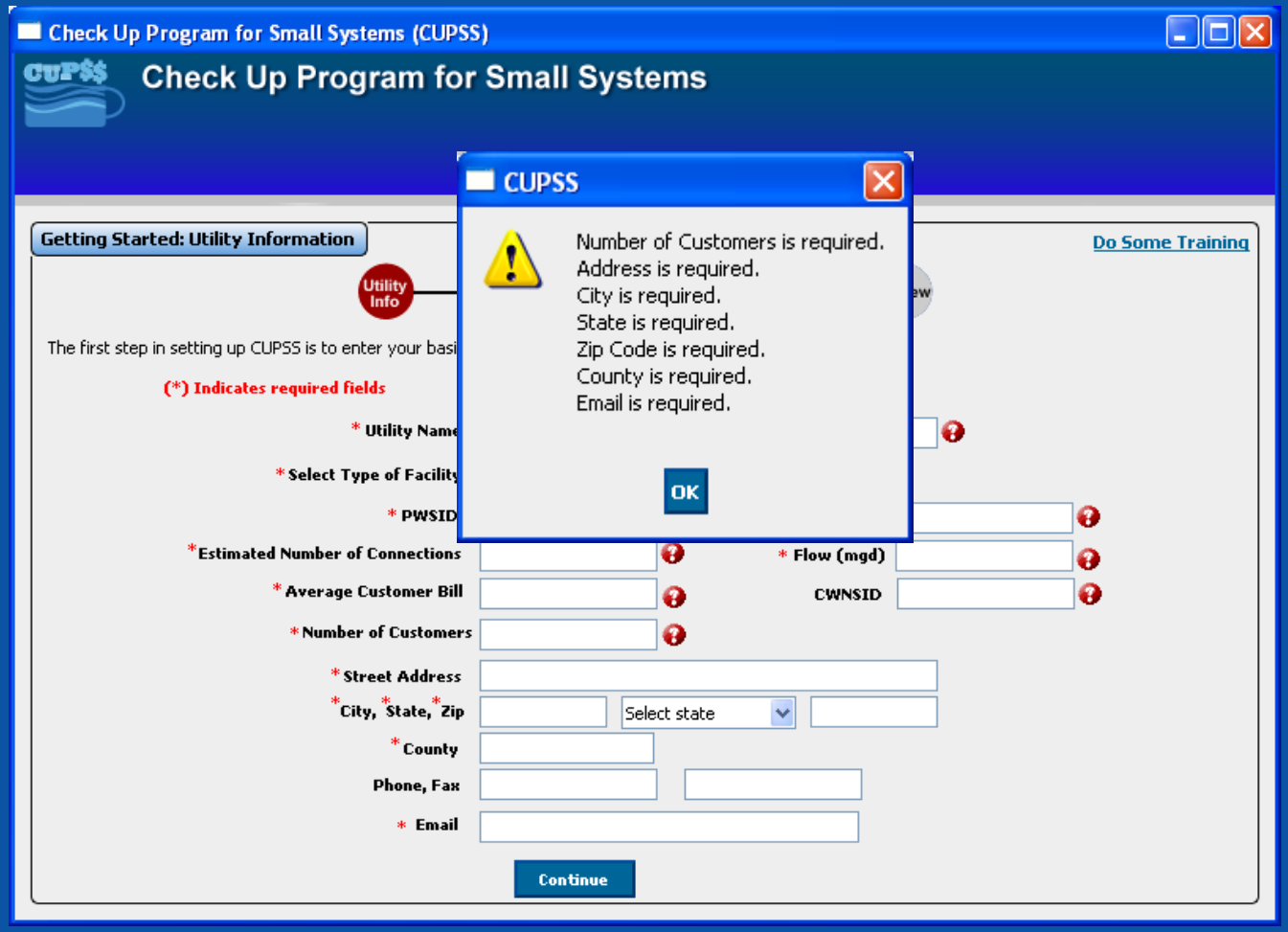
1. Enter utility information
2. Enter user information
3. Schedule operations and maintenance tasks
4. Enter information about your team
5. Review and save data

Utility Information

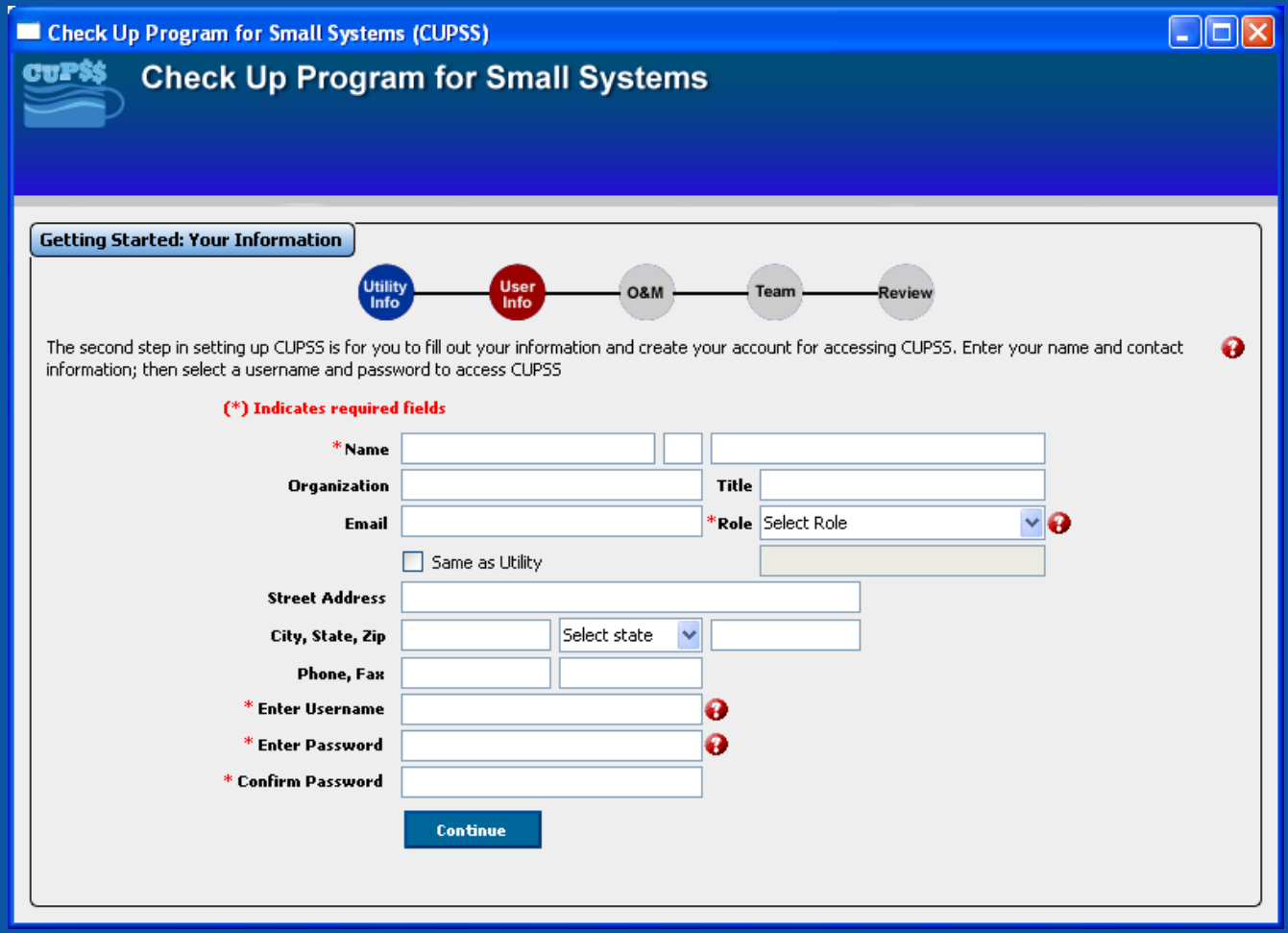
If you have multiple projects that you would like to enter into CUPSS, enter the utility name and then the project name.
Ex. Beauty View Acres - DW



Utility Information



User Information

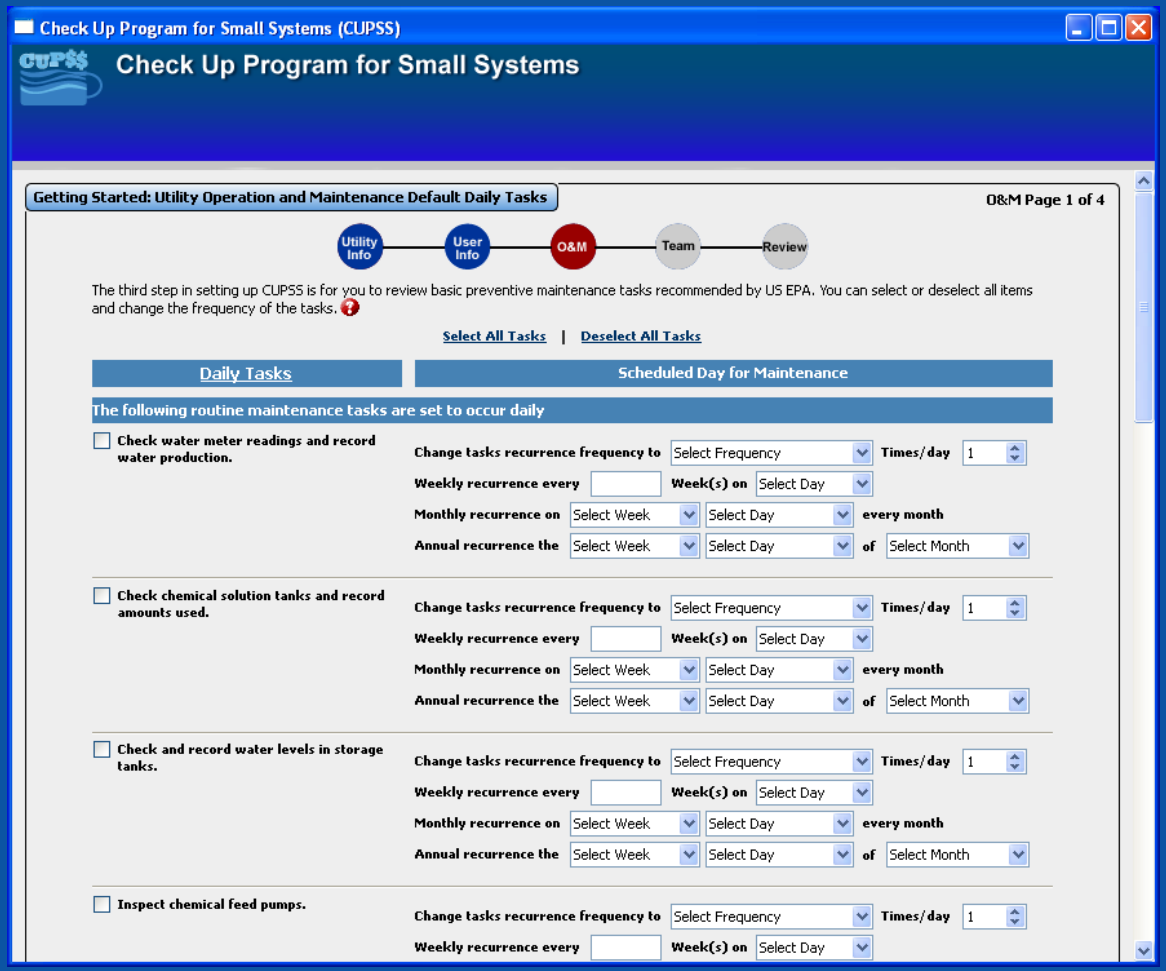


Operations and Maintenance

4 different schedules for O&M Tasks

- Daily
- Weekly
- Monthly
- Annually

O&M Tasks


Check Up Program for Small Systems (CUPSS)
Check Up Program for Small Systems
Getting Started: Utility Operation and Maintenance Default Daily Tasks
O&M Page 1 of 4
Utility Info
User Info
O&M
Team
Review
The third step in setting up CUPSS is for you to review basic preventive maintenance tasks recommended by US EPA. You can select or deselect all items and change the frequency of the tasks.
Select All Tasks | Deselect All Tasks
Daily Tasks
Scheduled Day for Maintenance
The following routine maintenance tasks are set to occur daily
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.
Change tasks recurrence frequency to
Select Frequency
Times/day
Weekly recurrence every
Week(s) on
Select Day
Monthly recurrence on
Select Week
every month
Annual recurrence the
of
Select Month

Assemble Your Team

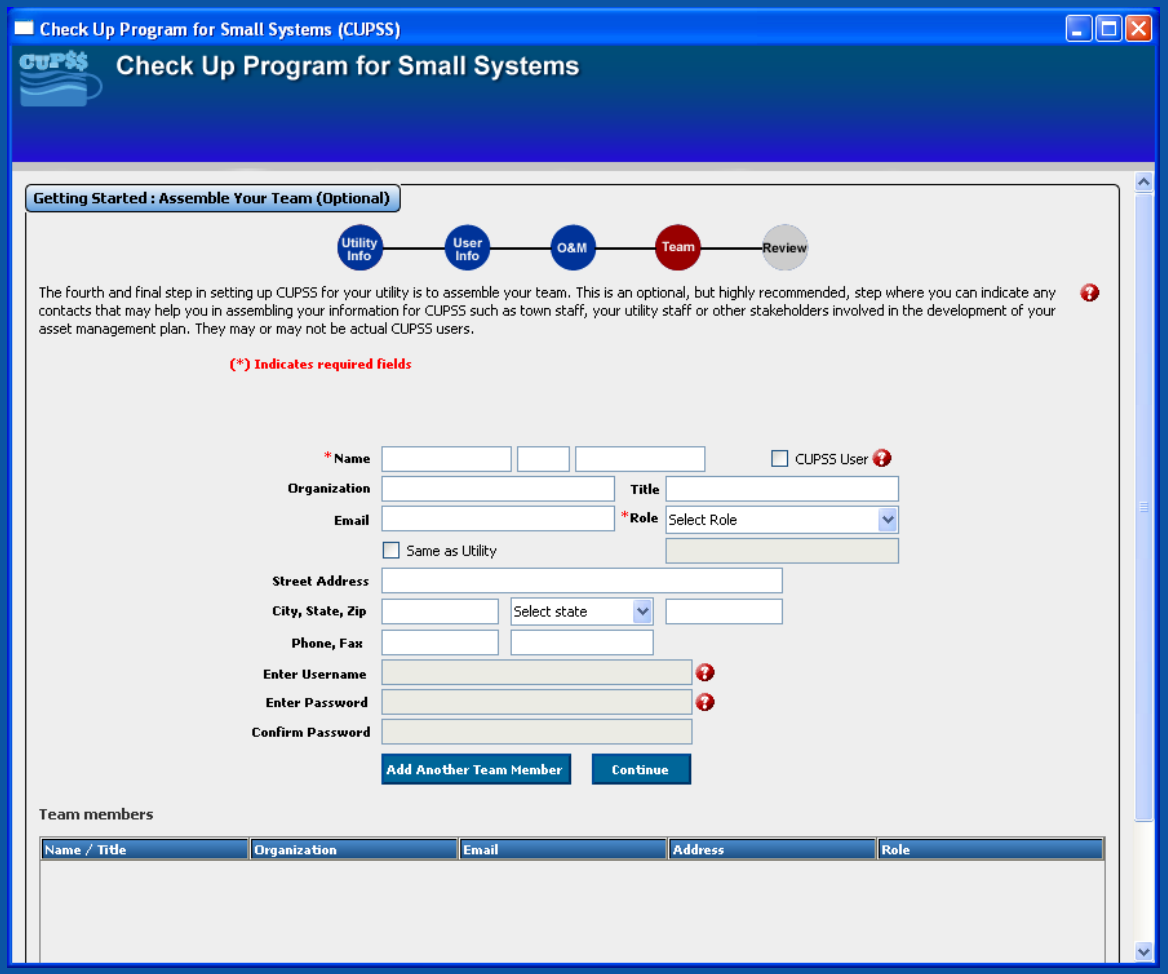
Your team may include the following people:

Benefits to My Utility

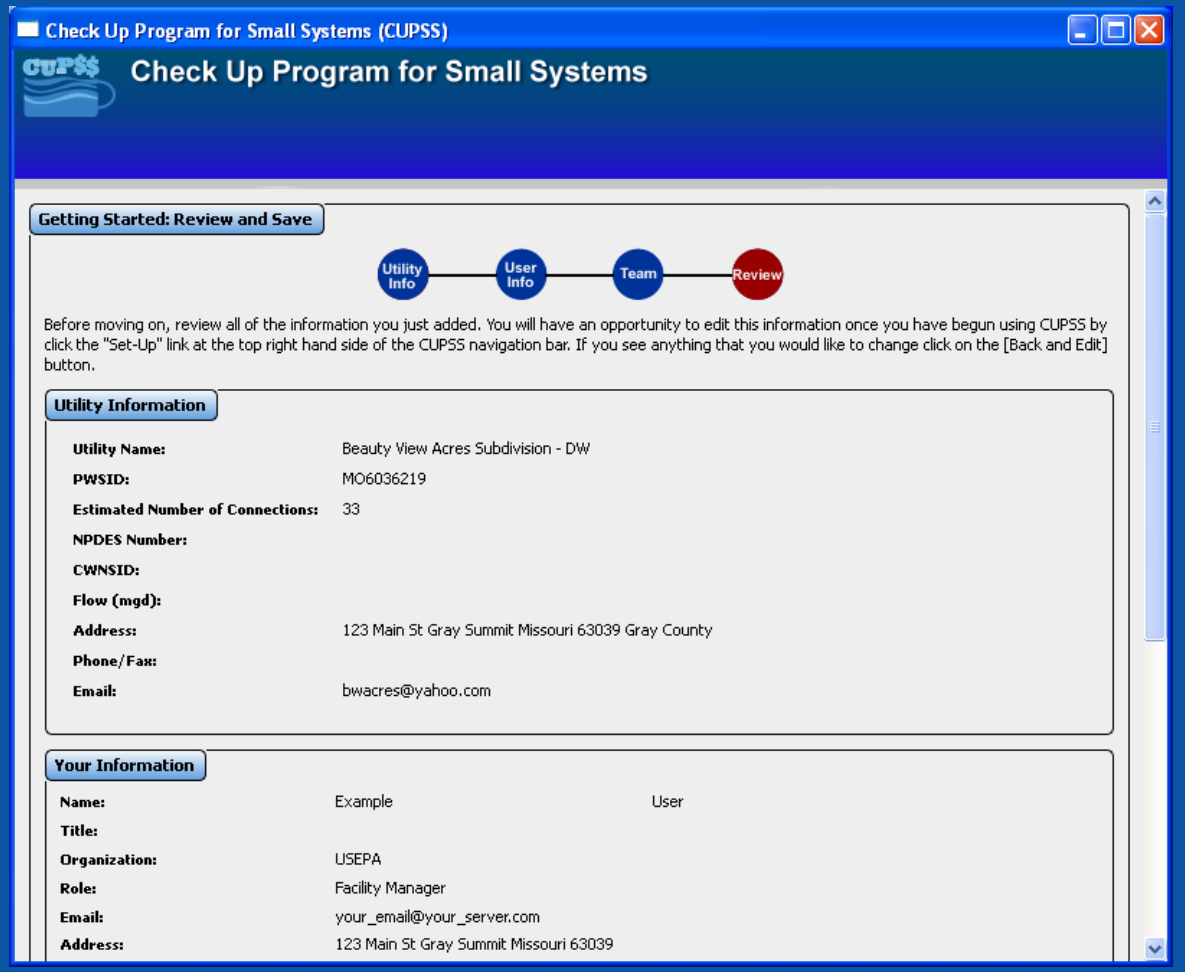
CUPSS can help you save your team member contacts in one easy to find place. These team members will later help you prepare and implement your Asset Management Plan.

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

Add Team Members



Set Up Review



Setting Up CUPSS Exercise

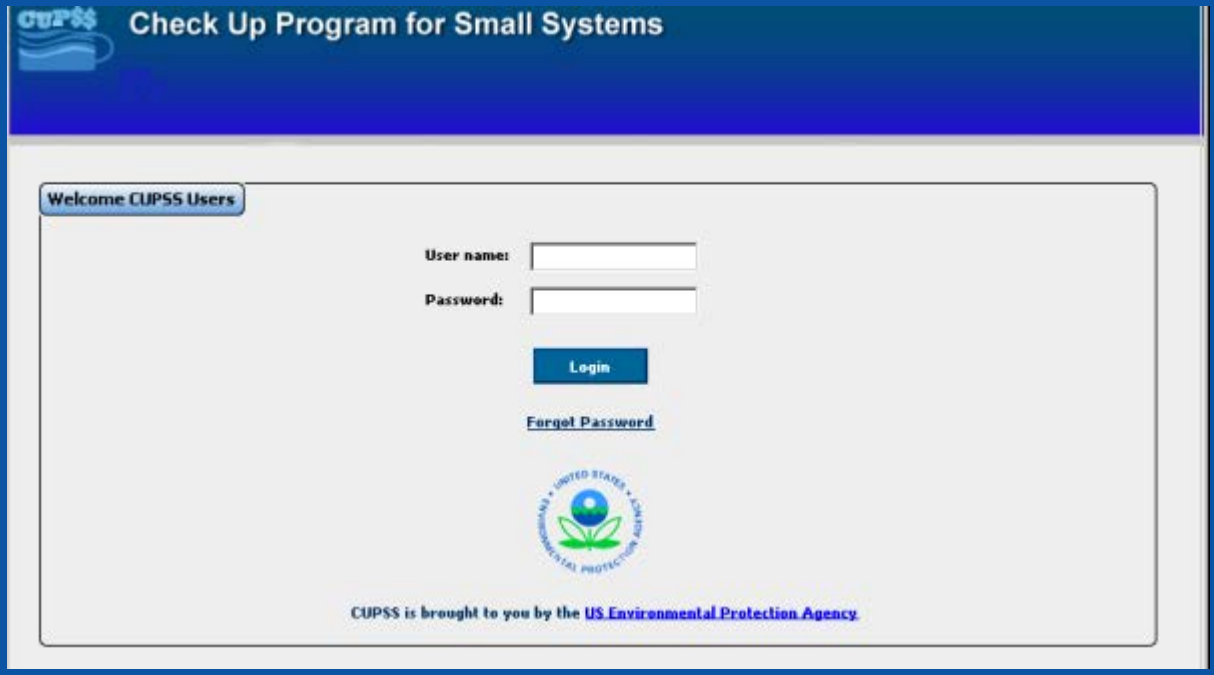
Q&A on Setting Up CUPSS

LOGIN AND NAVIGATION

Benefits to My Utility

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

Login


Check Up Program for Small Systems
Welcome CUPSS Users
User name:
Password:
Login
Forgot Password
CUPSS is brought to you by the US Environmental Protection Agency

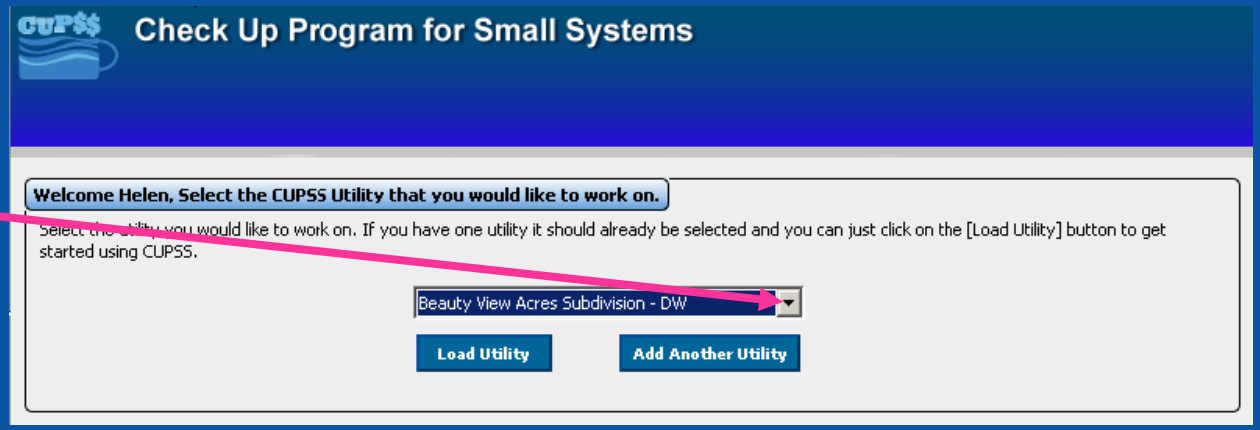
Password Information

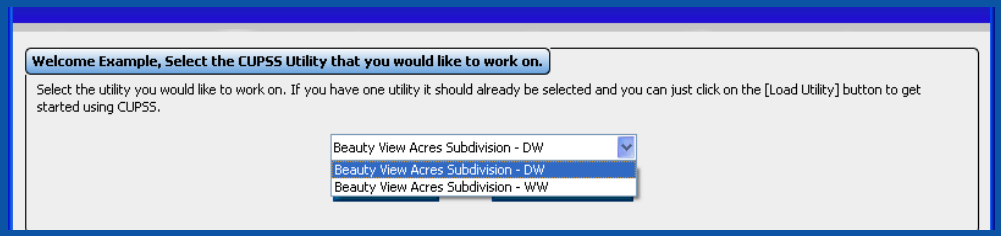
CupssPasswords_04-16-2008.txt - Notepad

File Edit Format View Help

```
 USERNAME/PASSWORD
----------------------

HHOWARD/BEAUTY1

BDUNLEVY/BEAUTY1

SWYATT/bEAUTY1

DDAUGHERTY/BEAUTY1

JHOAGLAND/BEAUTY1

DSIDERS/BEAUTY1

SBOWMAN/BEAUTY1

AMCDONALD/BEAUTY1
```

Select Utility





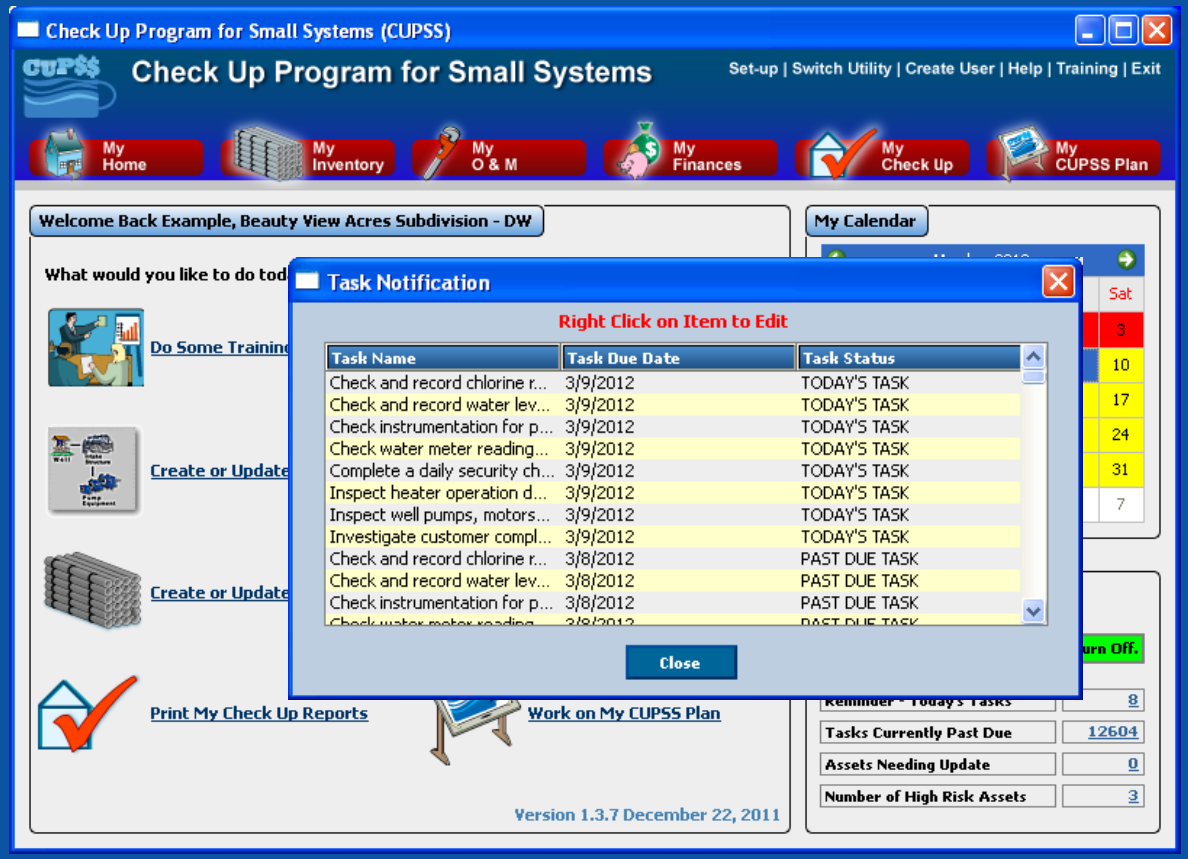
Benefits to My Utility

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

CUPSS Homepage

Benefits to My Utility

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



Navigate Through CUPSS

Navigation Area

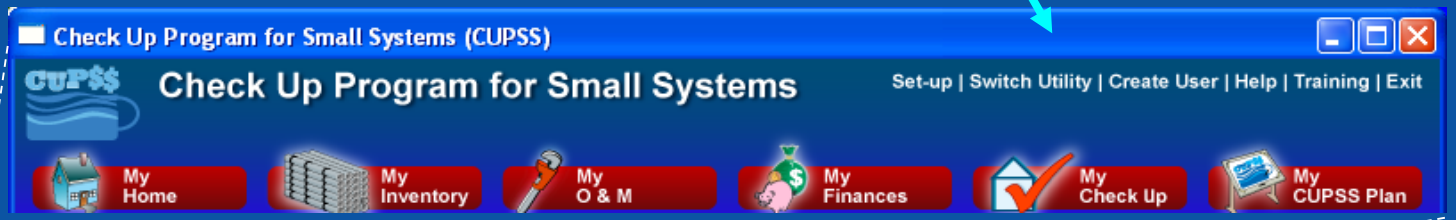
- Includes the administration menu and the CUPSS module buttons

Activity Windows

- Where you will view, edit and manipulate data

Navigation Area

Administration Menu



CUPSS Module Buttons

Activity Windows

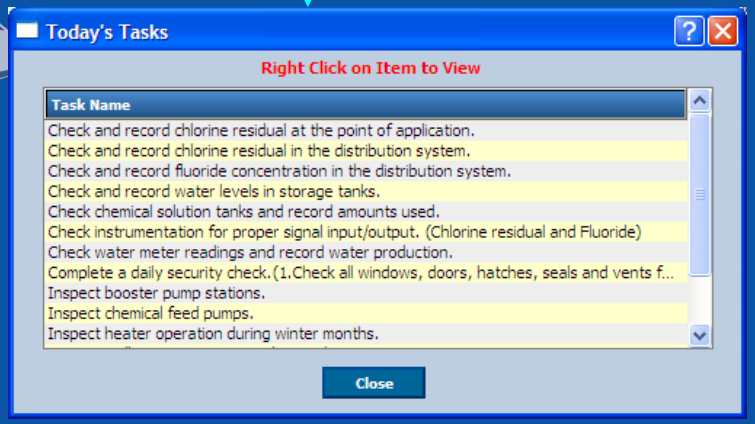
Main Window

My Calendar Window

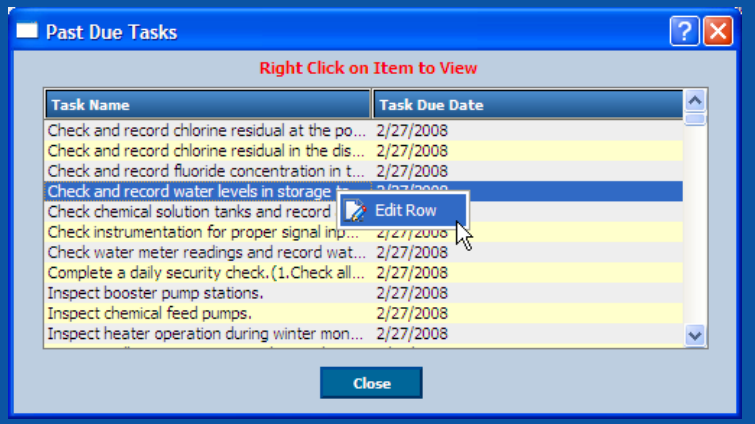
My Messages and Alerts Window

Status Tables

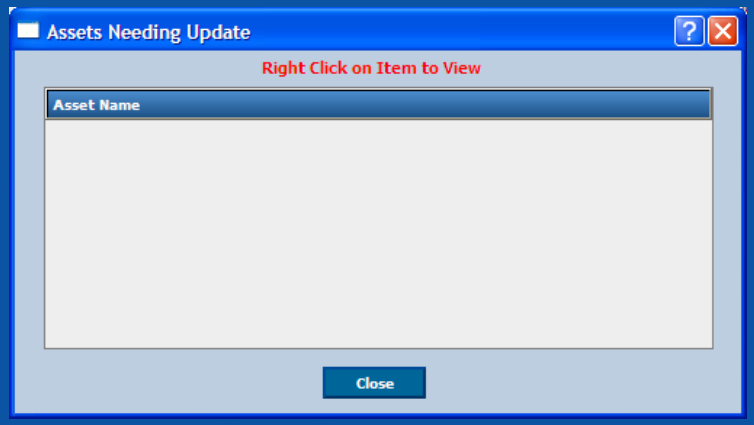
Today's Tasks



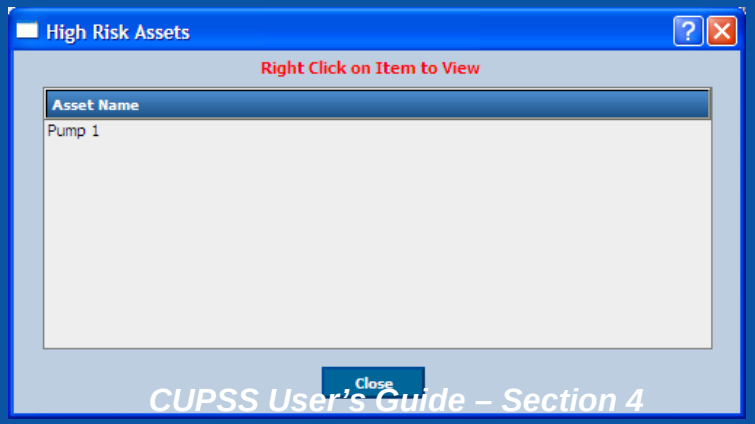
Tasks Currently Past Due



Assets Needing Update



Number of High Risk Assets

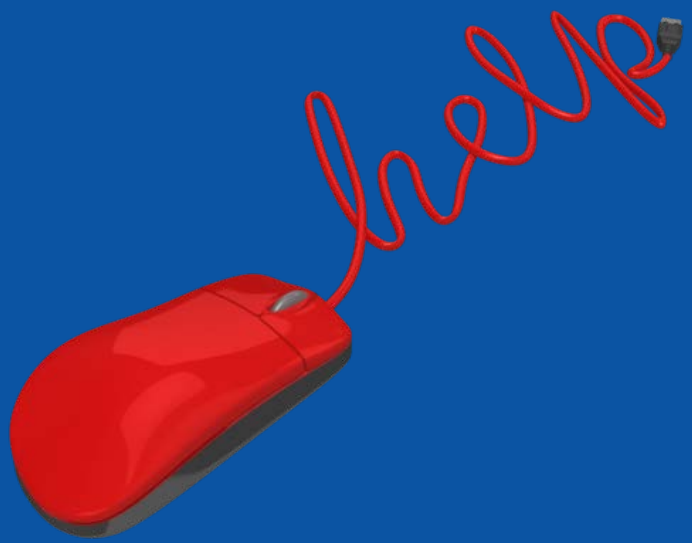


HELP

Benefits to My Utility

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

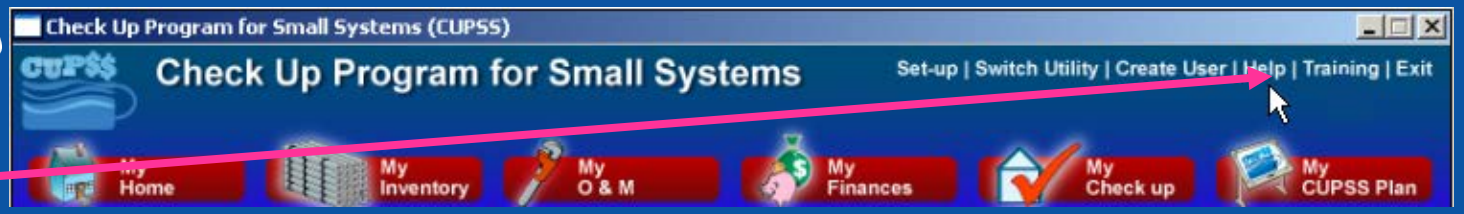
Help

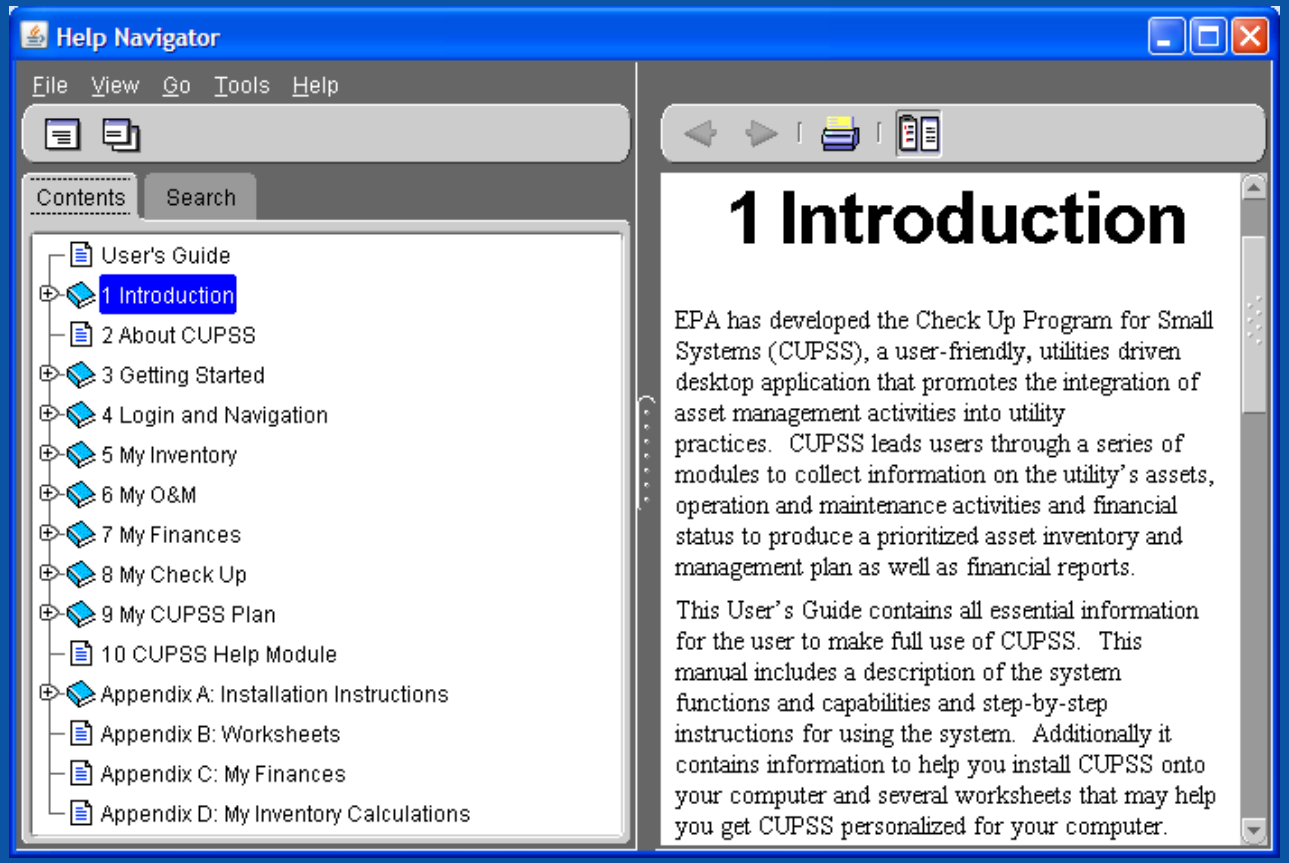


In the Help module, we will be discussing:

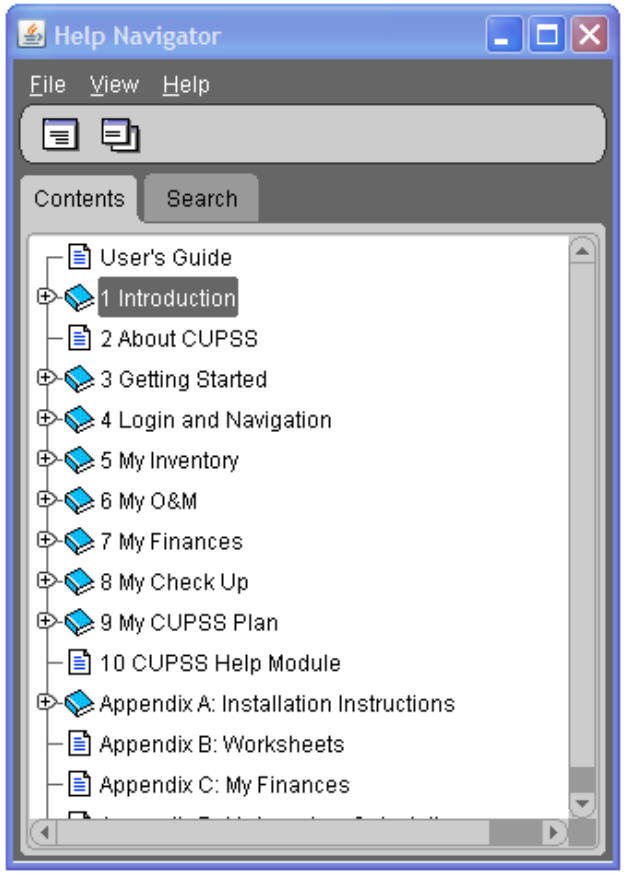
- How to view the contents within the electronic CUPSS User's Guide
- How to search the CUPSS User's Guide

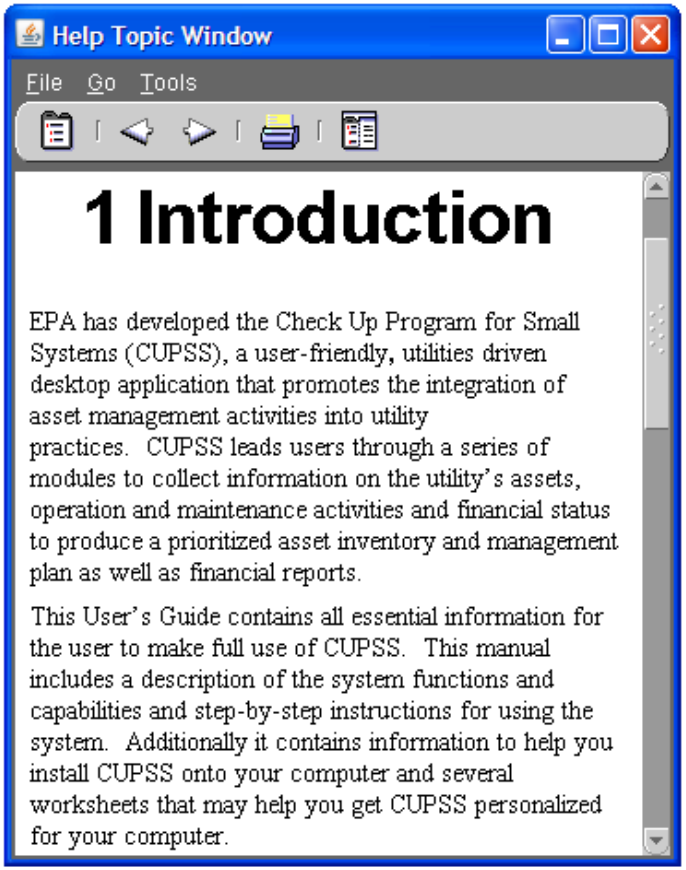
CUPSS Help Module



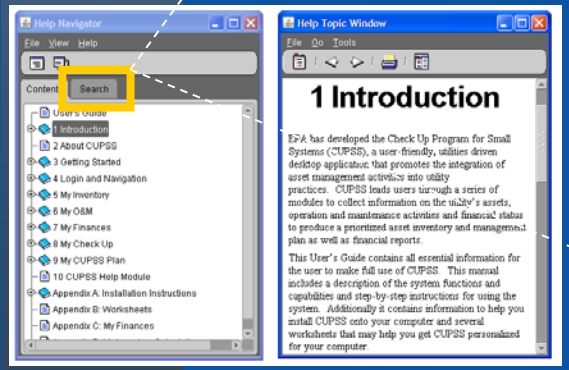


Browse Help


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


Help Topic Window
File Go Tools
1 Introduction
EPA has developed the Check Up Program for Small Systems (CUPSS), a user-friendly, utilities driven desktop application that promotes the integration of asset management activities into utility practices. CUPSS leads users through a series of modules to collect information on the utility's assets, operation and maintenance activities and financial status to produce a prioritized asset inventory and management plan as well as financial reports.
This User's Guide contains all essential information for the user to make full use of CUPSS. This manual includes a description of the system functions and capabilities and step-by-step instructions for using the system. Additionally it contains information to help you install CUPSS onto your computer and several worksheets that may help you get CUPSS personalized for your computer.

Search Help



Help Navigator

File View Go Tools Help

Contents | Search

Type the words for which you want to search

financial — Search

☑ Case-sensitive

Search for

- ◉ All of these words
- ○ Any of these words
- ○ This Boolean expression

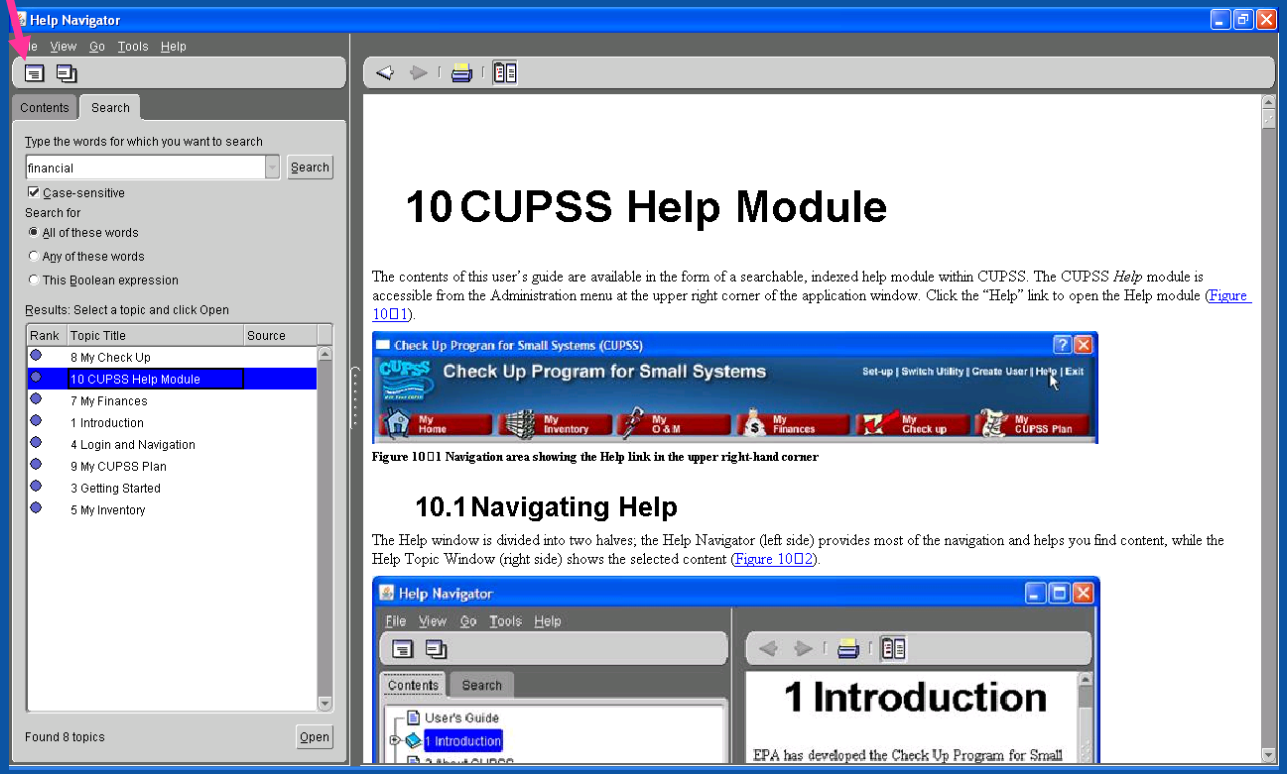
Results: Select a topic and click Open

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

Found 8 topics — Open

Search Results

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



Poll Question

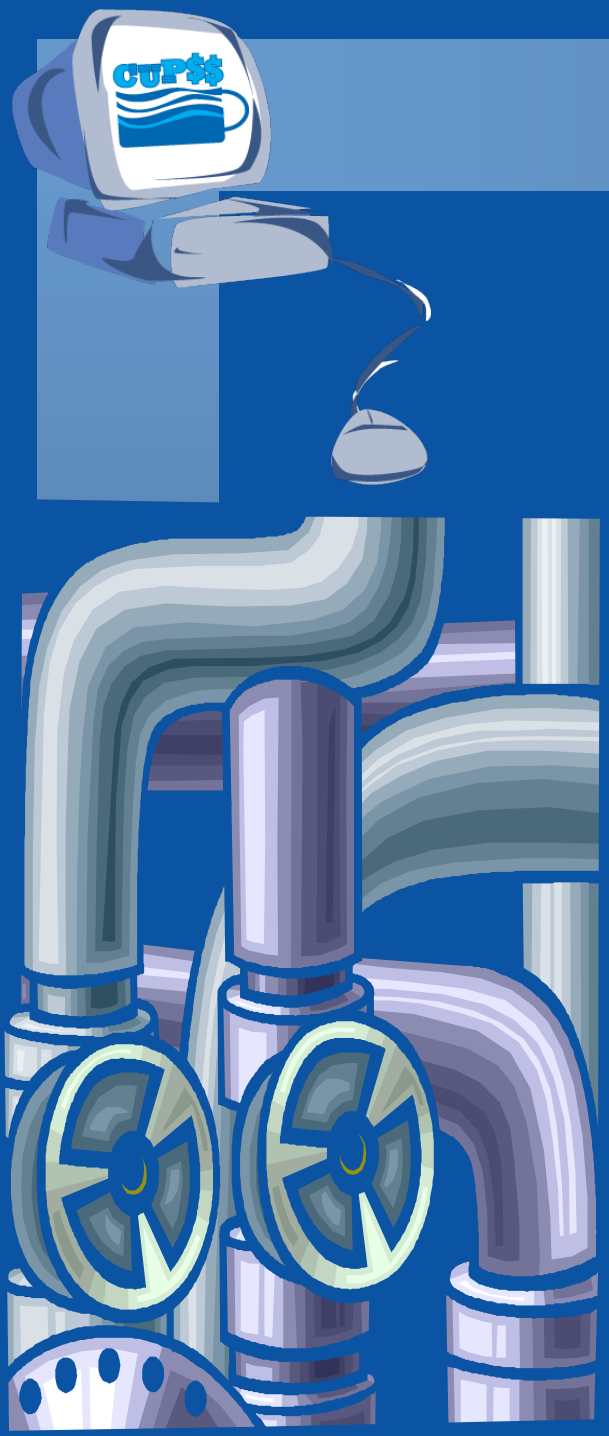
In what chapters is the term ‘financial’ located?

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

CUPSS Example

Help Exercise

Q&A on Login / Navigation and Help



MY INVENTORY

Benefits to My Utility

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

Asset Management Core Questions

CUPSS Modules

1 Current State of Assets

- My Inventory
- My O&M
- My CUPSS Plan

2 Level of Service

- My CUPSS Plan

3 Critical Assets

- My Inventory
- My Asset Check Up
- My CUPSS Plan

4 Minimum Life Cycle Cost

- My Finances
- My O&M
- My Financial Check Up
- My CUPSS Plan

5 Long-term Funding Plan

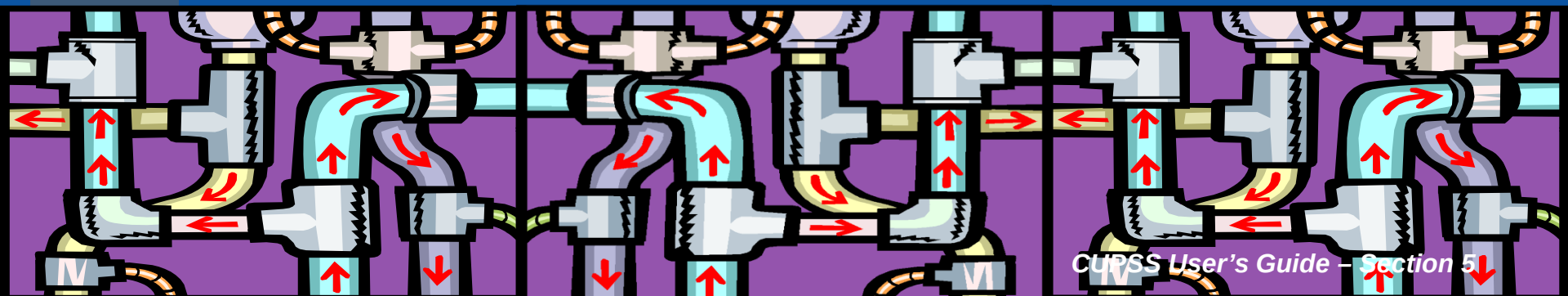
- My Finances
- My Financial Check Up
- My CUPSS Plan

Asset Management

My Inventory

In the My Inventory module, we will be discussing:

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



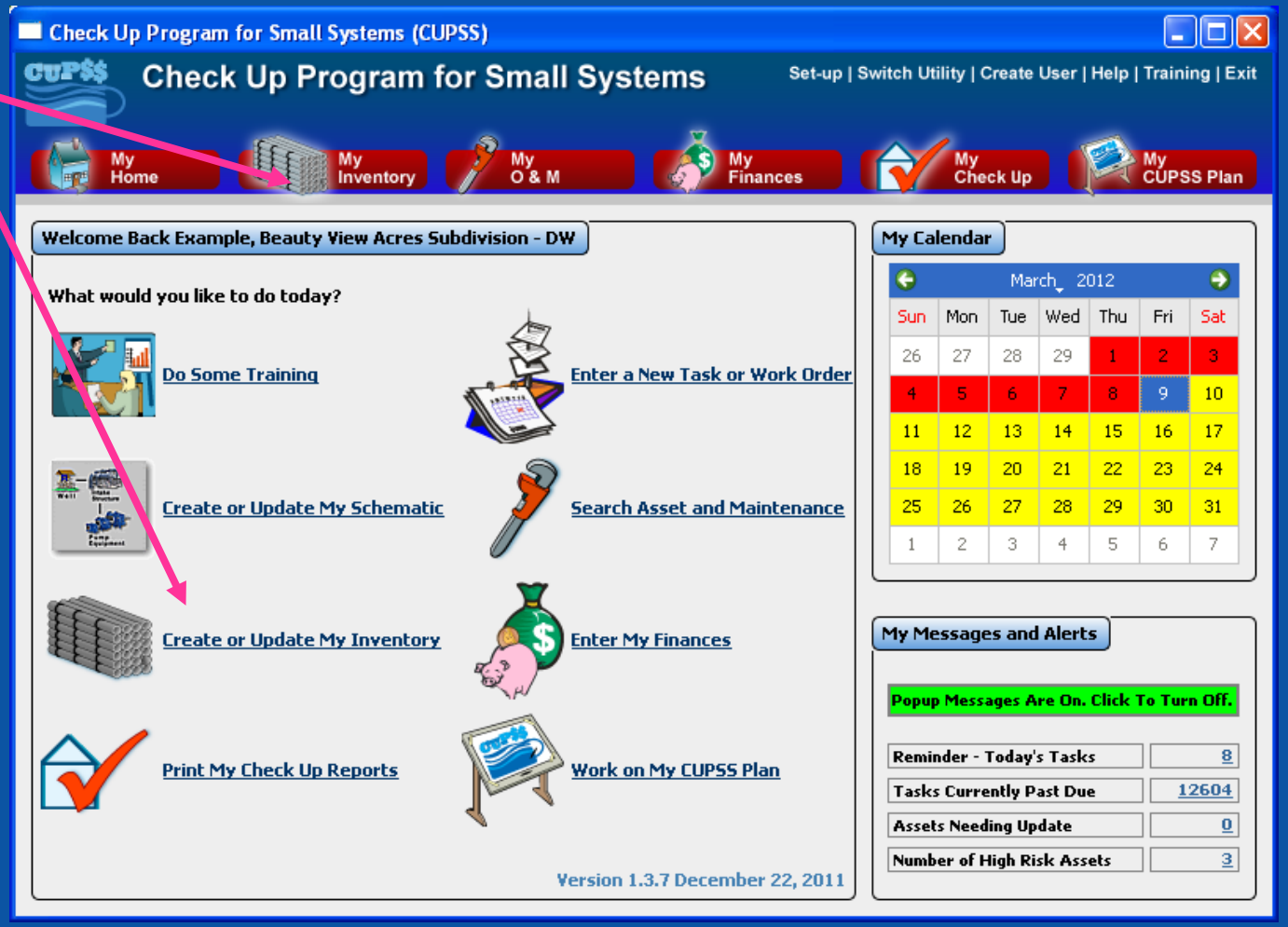
Why Manage Your Inventory?

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

Think about the Asset Management Plan

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

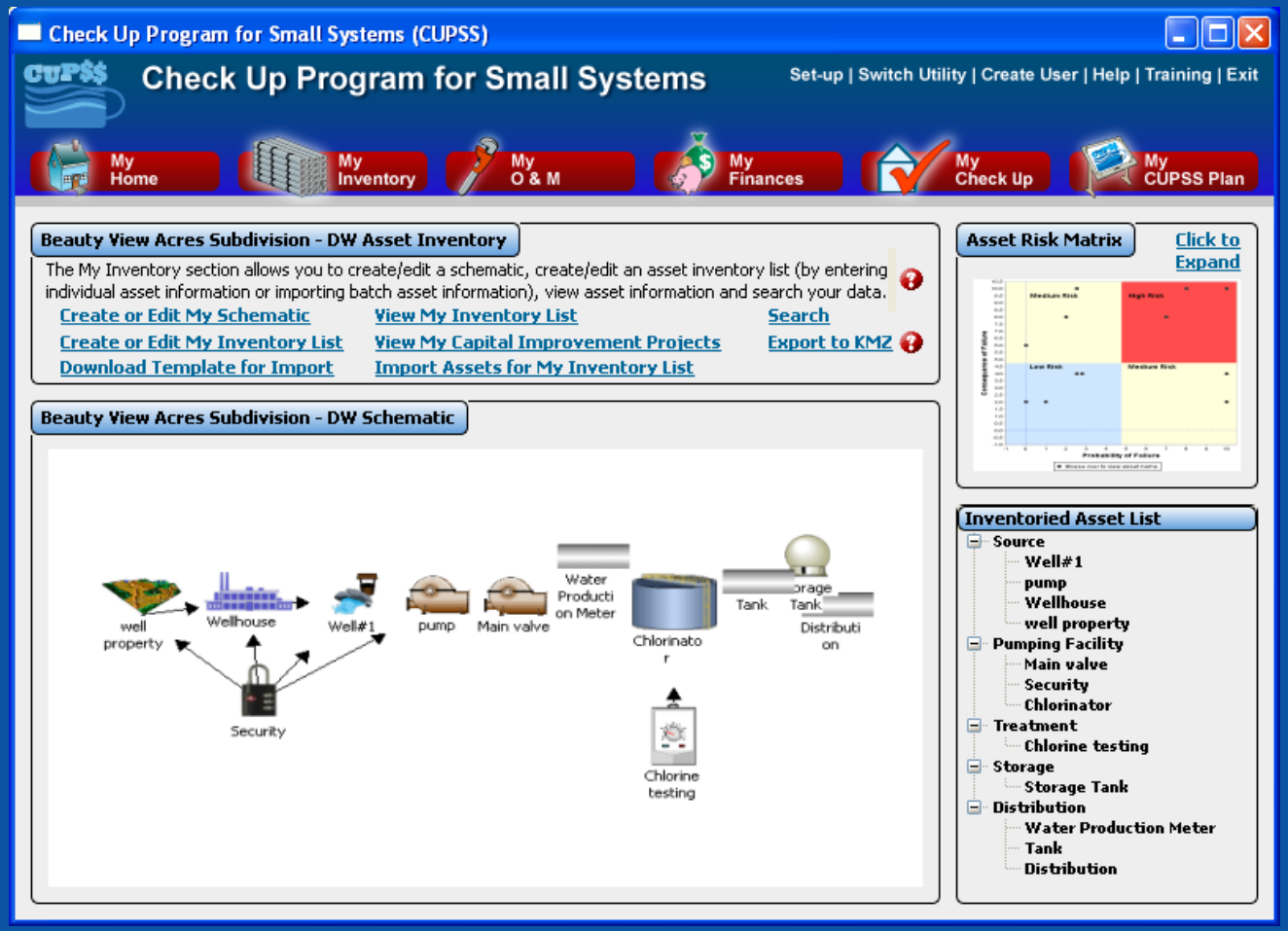
Navigate to My Inventory



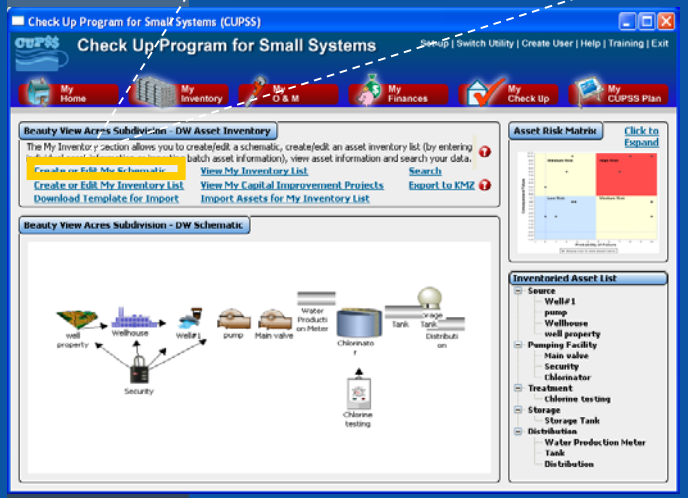
CUPSS Example

My Inventory Exercise

My Inventory Home



Create or Edit My Schematic

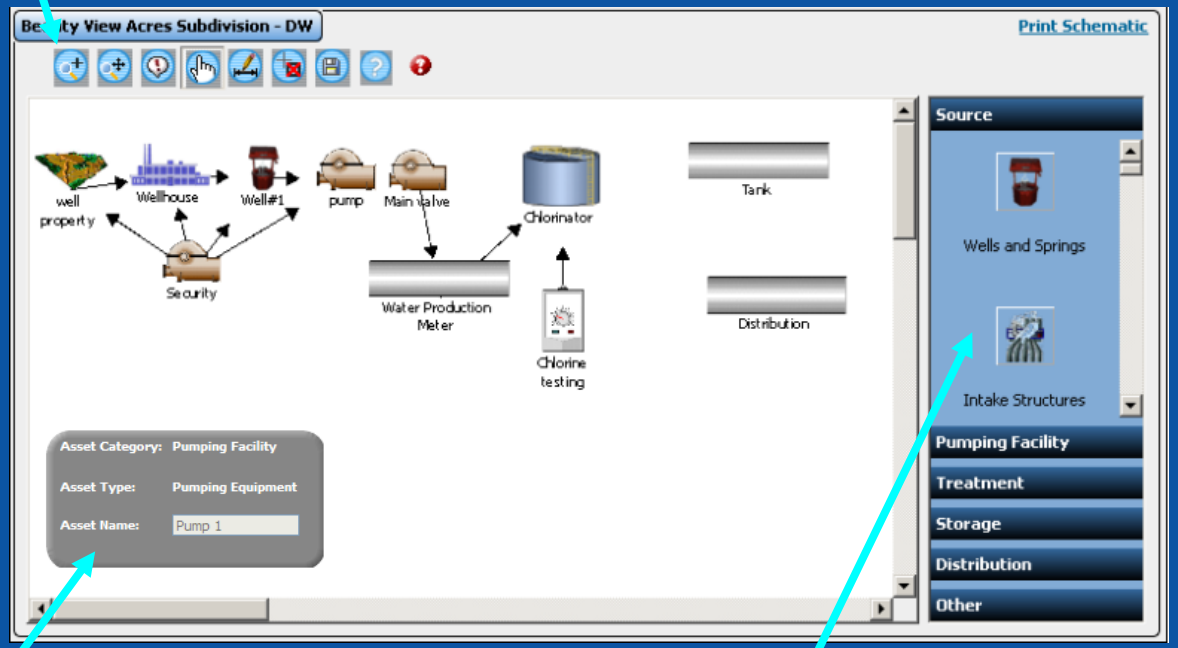


Benefits to My Utility

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

Create or Edit My Schematic

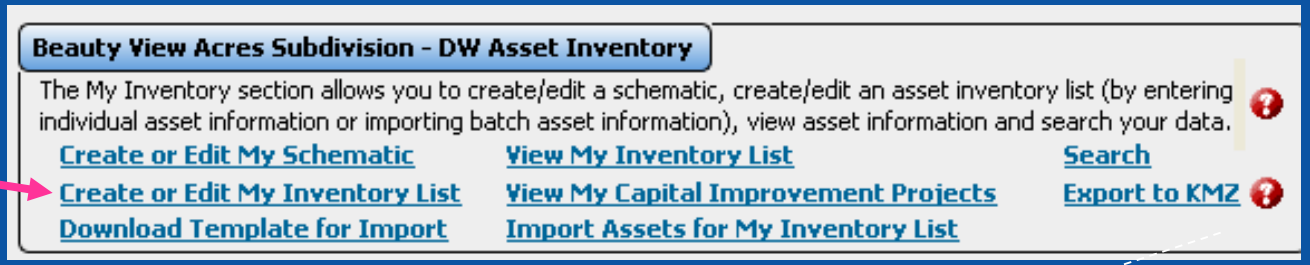
Schematic Editing Buttons

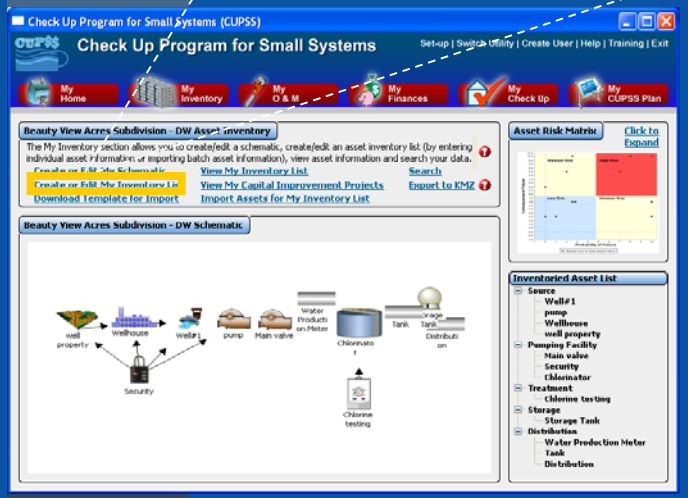


Identify Asset

Asset Category Images

Create or Edit My Inventory List





Benefits to My Utility

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

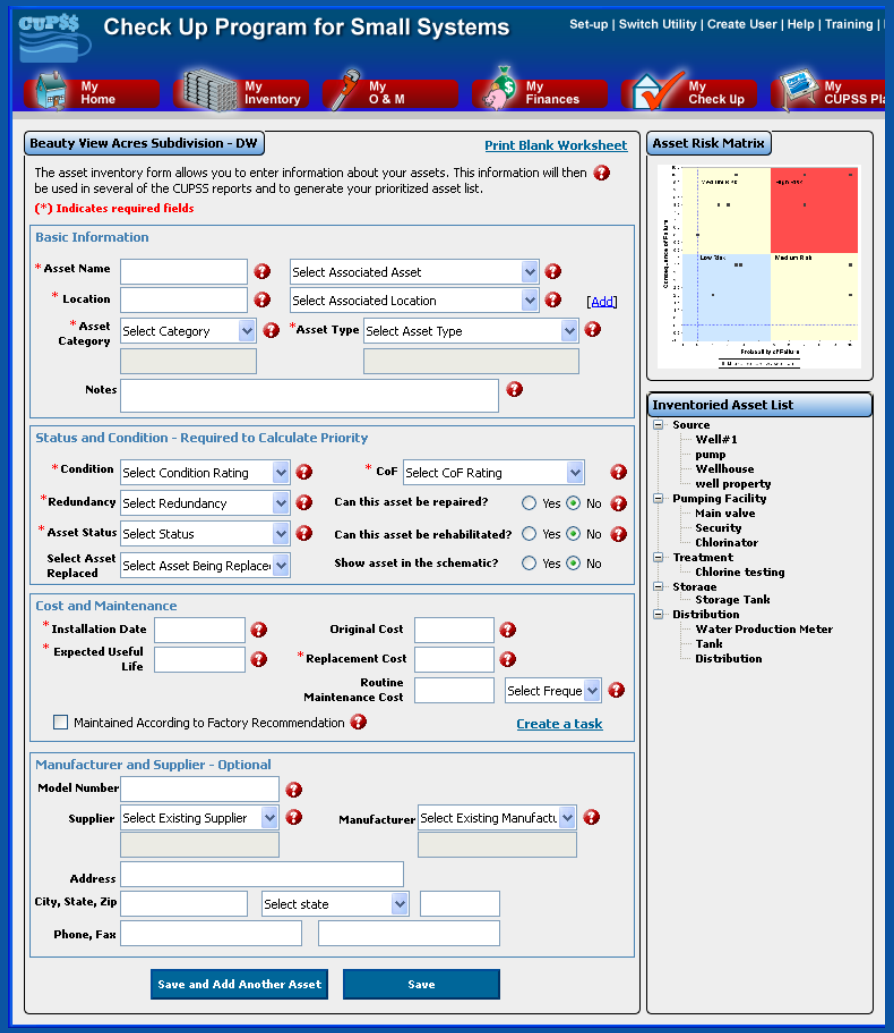
Asset Inventory

Basic Information

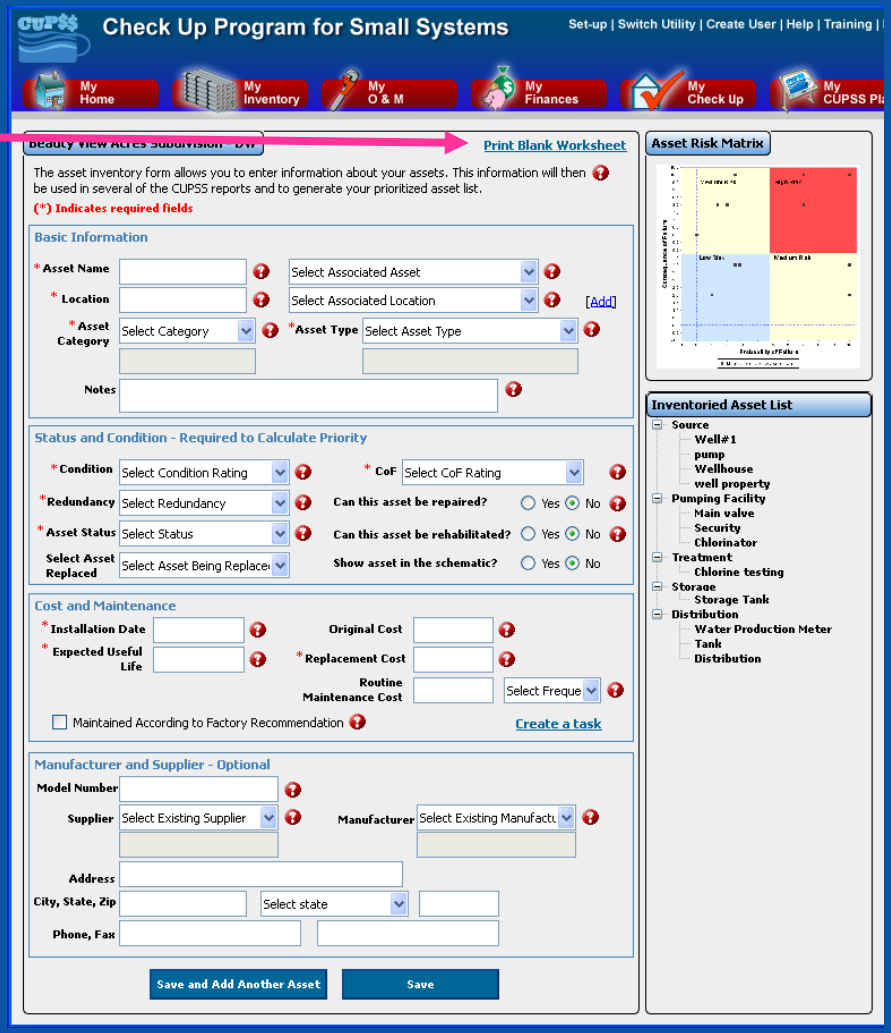
Status and Condition

Cost and Maintenance

Manufacturer and Supplier



Print Blank Worksheet



Blank Drinking Water Worksheet

Inventory List (Drinking Water)

Asset Name	Location
Associated Asset	**Associated Location**
Asset ID (optional)	**Asset Size (optional)**
Asset Latitude (optional)	**Asset Longitude (optional)**
Storage Capacity in Days (optional)	**Linear Feet (optional)**
Acres of Land (optional)	

Asset Category

❑ Source ❑ Pumping Facility ❑ Treatment ❑ Storage ❑ Distribution ❑ Other

Asset Type

❑ Wells and Springs	❑ Valves	❑ Hydrants	❑ Galleries and Tunnels
❑ Intake Structures	❑ Computer Equipment/ Software	❑ Treatment Equipment	❑ Meters
❑ Pumping Equipment	❑ Transformers/ Switchgears/ Wiring	❑ Lab/Monitoring Equipment	❑ Raw Water Reservoirs
❑ Disinfection Equipment	❑ Motor Controls/Drives	❑ Tools and Shop Equipment	❑ Generators
❑ Hydropneumatic Tanks	❑ Sensors	❑ Transportation Equipment	❑ Liquid Waste Handling & Disposal
❑ Concrete & Metal Storage Tanks	❑ Buildings	❑ Security Equipment	❑ Solid Waste Handling & Disposal
❑ Transmission Mains	❑ Service Lines	❑ Land	❑ Wells
❑ Distribution/ Collection Mains			❑ Springs
			❑ Other

Asset Status

❑ Active ❑ Not in Use – Abandoned ❑ Not in Use – Back Up ❑ Future Investment

Can this Asset be Repaired? ❑ Yes ❑ No	Can this Asset be Rehabilitated? ❑ Yes ❑ No
Asset Replaced (optional):	Show asset in schematic? ❑ Yes ❑ No

Condition

❑ Excellent ❑ Good ❑ Fair (Average) ❑ Poor ❑ Very Poor

Is the asset maintained according to manufacturer's recommendations? ❑ Yes ❑ No

Capacity

❑ Fullsized ❑ Oversized ❑ Undersized

Consequence of Failure

❑ Insignificant – CoF of 2 ❑ Minor – CoF of 4 ❑ Moderate – CoF of 6
❑ Major – CoF of 8 ❑ Catastrophic – CoF of 10

Redundancy

❑ 0% Backup ❑ 50% Backup ❑ 100% Backup ❑ 200% Secondary Backup

Installation Date	Original Cost
	$
Expected Useful Life	**Replacement Cost**
	$
Routine Maintenance Costs	**Timeframe - Frequency of Routine Maintenance**
$	❑ per/day ❑ per/week ❑ per/month ❑ per/year ❑ lifetime

Optional Information

Model Number	Manufacturer
Supplier Name	**Address**
City, State, Zip	**Phone Number**
Fax Number	**Notes**

Blank Wastewater Worksheet

Inventory List (Wastewater)

Asset Name	Location
Associated Asset	**Associated Location**
Asset ID (optional)	**Asset Size (optional)**
Asset Latitude (optional)	**Asset Longitude (optional)**
Storage Capacity in Days (optional)	**Linear Feet (optional)**
Acres of Land (optional)	

Asset Category

❑ Pumping Facility ❑ Treatment ❑ Storage ❑ Collection ❑ Other

Asset Type

❑ Pumping Equipment	❑ Transformers/ Switchgears/ Wiring	❑ Lab/ Monitoring Equipment	❑ Galleries and Tunnels
❑ Disinfection Equipment	❑ Motor Controls/Drives	❑ Tools and Shop Equipment	❑ Meters
❑ Concrete & Metal Storage Tanks	❑ Sensors	❑ Transportation Equipment	❑ Generators
❑ Transmission Mains	❑ Buildings	❑ Security Equipment	❑ Liquid Waste Handling & Disposal
❑ Valves	❑ Service Lines	❑ Land	❑ Solid Waste Handling & Disposal
❑ Computer Equipment/ Software	❑ Treatment Equipment	❑ Sewers	❑ Digester
	❑ Distribution/ Collection Mains	❑ Pressure Pipework	❑ Other

Asset Status

❑ Active ❑ Not in Use – Abandoned ❑ Not in Use – Back Up ❑ Future Investment

Can this Asset be Repaired? ❑ Yes ❑ No	Can this Asset be Rehabilitated? ❑ Yes ❑ No
Asset Replaced (optional):	Show asset in schematic? ❑ Yes ❑ No

Condition

❑ Excellent ❑ Good ❑ Fair (Average) ❑ Poor ❑ Very Poor

Is the asset maintained according to manufacturer's recommendations? ❑ Yes ❑ No

Capacity

❑ Fullsized ❑ Oversized ❑ Undersized

Consequence of Failure

❑ Insignificant – CoF of 2 ❑ Minor – CoF of 4 ❑ Moderate – CoF of 6
❑ Major – CoF of 8 ❑ Catastrophic – CoF of 10

Redundancy

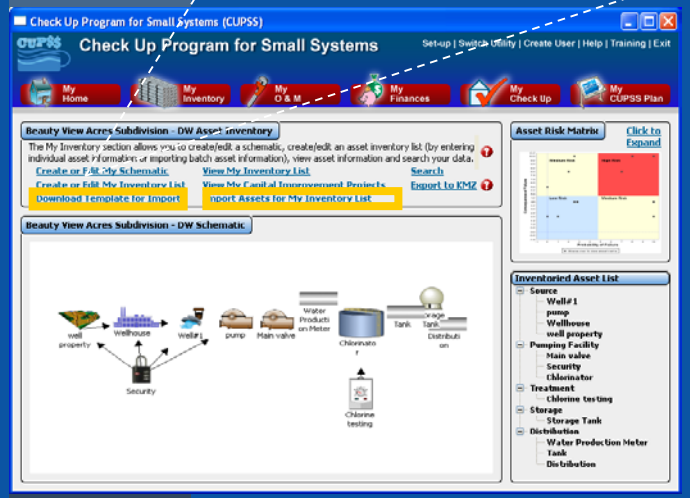
❑ 0% Backup ❑ 50% Backup ❑ 100% Backup ❑ 200% Secondary Backup

Installation Date	Original Cost
	$
Expected Useful Life	**Replacement Cost**
	$
Routine Maintenance Costs	**Timeframe - Frequency of Routine Maintenance**
$	❑ per/day ❑ per/week ❑ per/month ❑ per/year ❑ lifetime

Optional Information

Model Number	Manufacturer
Supplier Name	**Address**
City, State, Zip	**Phone Number**
Fax Number	**Notes**

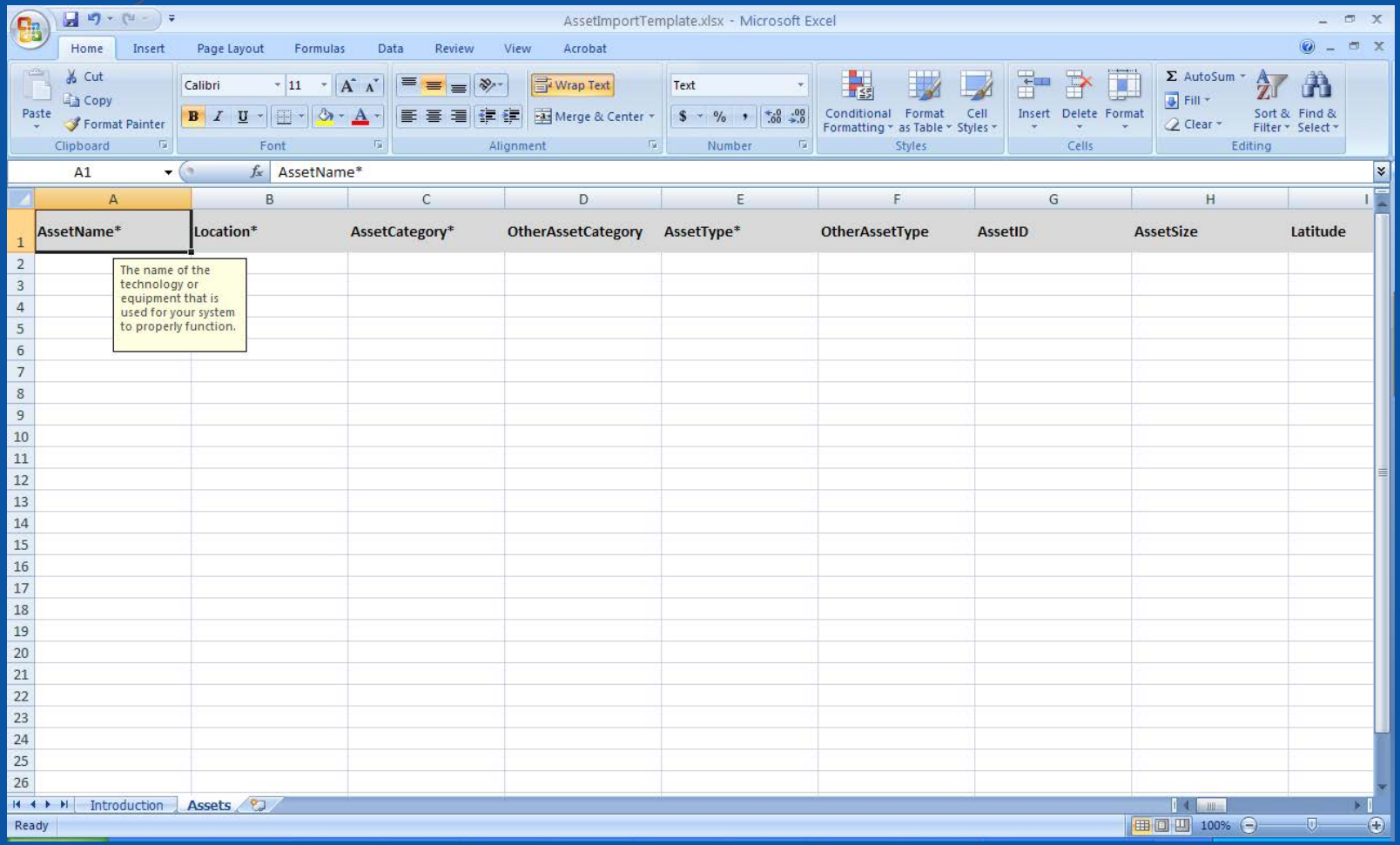
Import Assets for My Inventory List



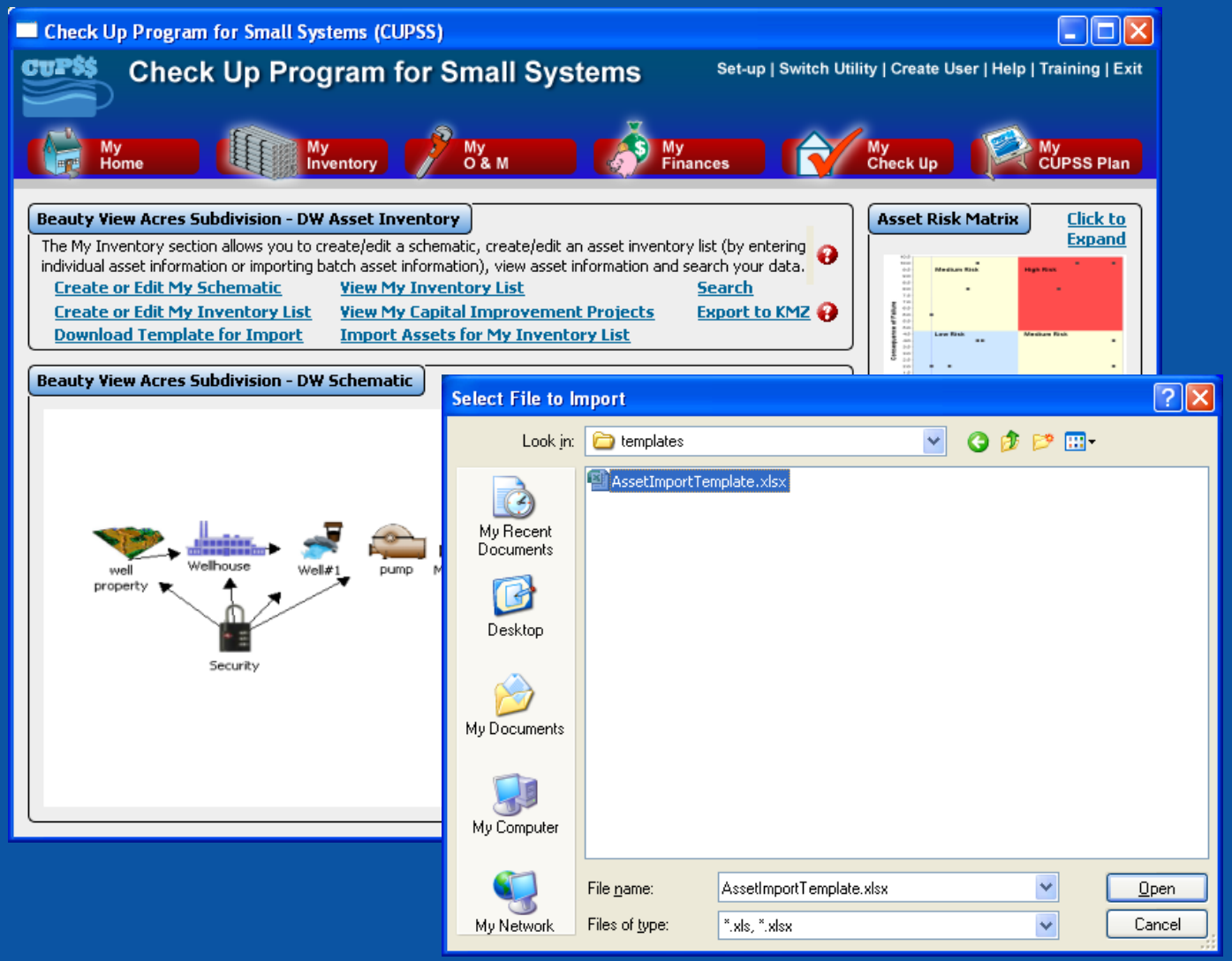
Benefits to My Utility

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

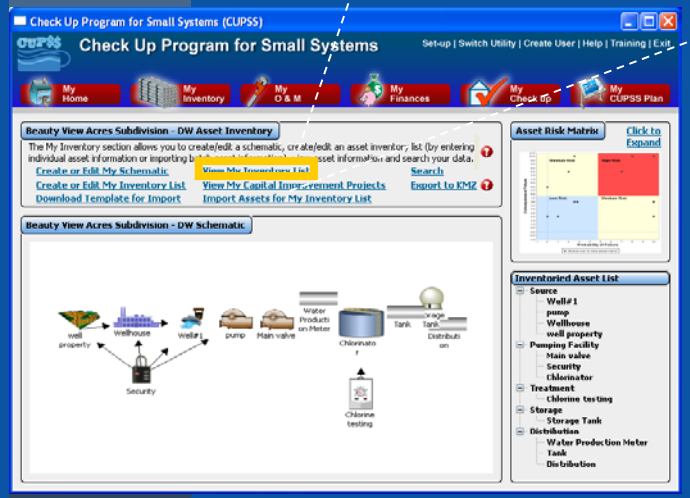
Download Template



Import Template



View My Inventory List



Benefits to My Utility

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

Asset Inventory List

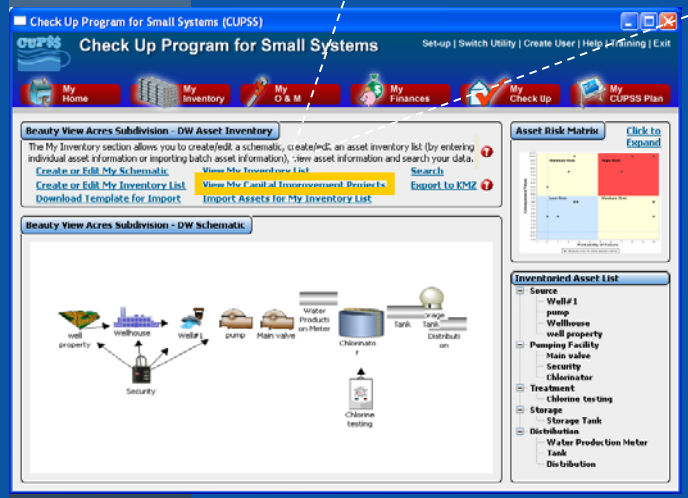
Beauty View Acres Subdivision - DW Inventory

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

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

<< Return

View My Capital Improvement Projects



Benefits to My Utility

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

Capital Improvement Projects

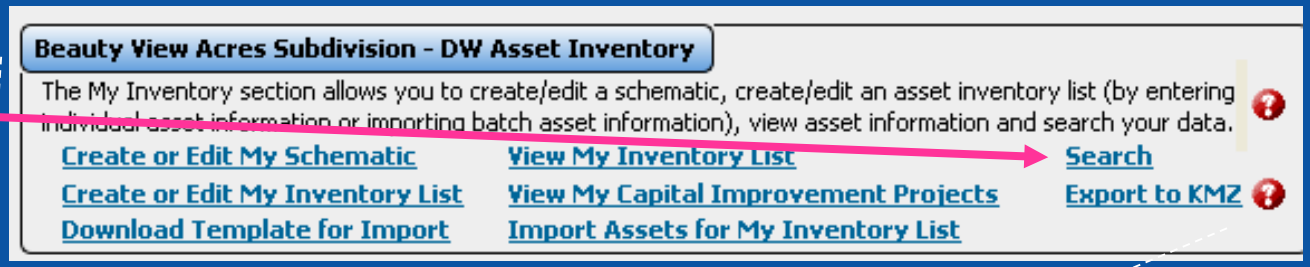
Beauty View Acres Subdivision - DW Capital Improvements

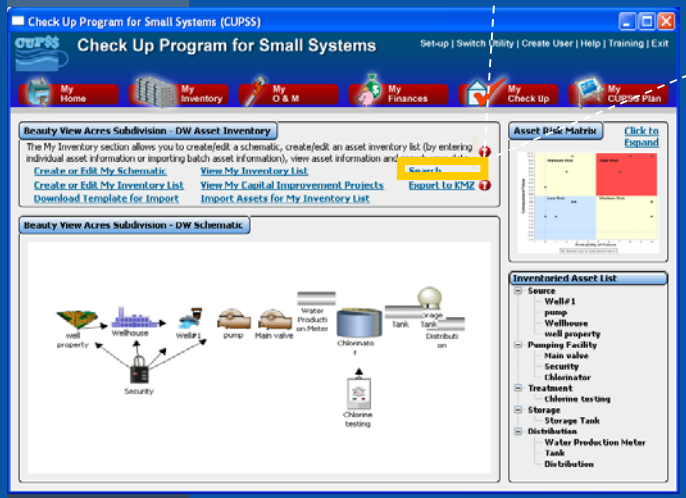
The following is a list of Capital Improvement Projects. Double click or right click on the "Recommended Date" column to change the recommended date and year for the capital improvements. To plan a needed capital improvement, click the "Add Planned Asset" button to to be directed to the "Create or Edit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

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

Save | Add Planned Asset

Search





Benefits to My Utility

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

Search and Report

Beauty View Acres Subdivision - DW Search And Report

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

Search Criteria

Select Utility: Beauty View Acres Subdivision - DW

Select Report Type: Asset Service Report

Filter By:

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

Task Date Range _ **Keyword**

<< Return View Results

Search Results

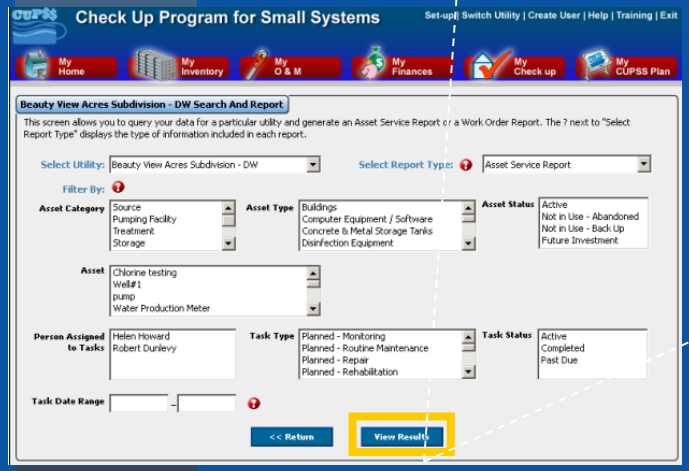
Beauty View Acres Subdivision - DW Search Results

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

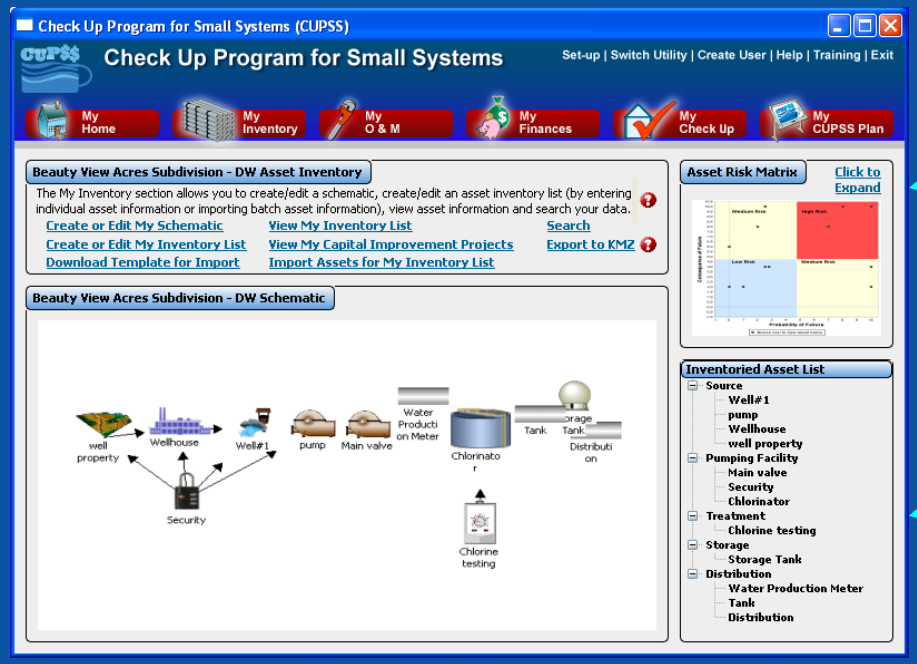
Asset Service Report

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

<< Return | Print Report



Asset Inventory



Asset Risk Matrix

Inventoried Asset List

Benefits to My Utility

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

Poll Question

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

A. Asset Inventory list

B. Import Asset Template

C. Either, depending on the situation

CUPSS Example

Q&A on My Inventory

MY ASSET CHECK UP REPORT

Benefits to My Utility

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

Asset Management Core Questions

CUPSS Modules

1 Current State of Assets

- My Inventory
- My O&M
- My CUPSS Plan

2 Level of Service

- My CUPSS Plan

3 Critical Assets

- My Inventory
- My Asset Check Up
- My CUPSS Plan

4 Minimum Life Cycle Cost

- My Finances
- My O&M
- My Financial Check Up
- My CUPSS Plan

5 Long-term Funding Plan

- My Finances
- My Financial Check Up
- My CUPSS Plan

Asset Management

My Asset Check Up Report

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

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

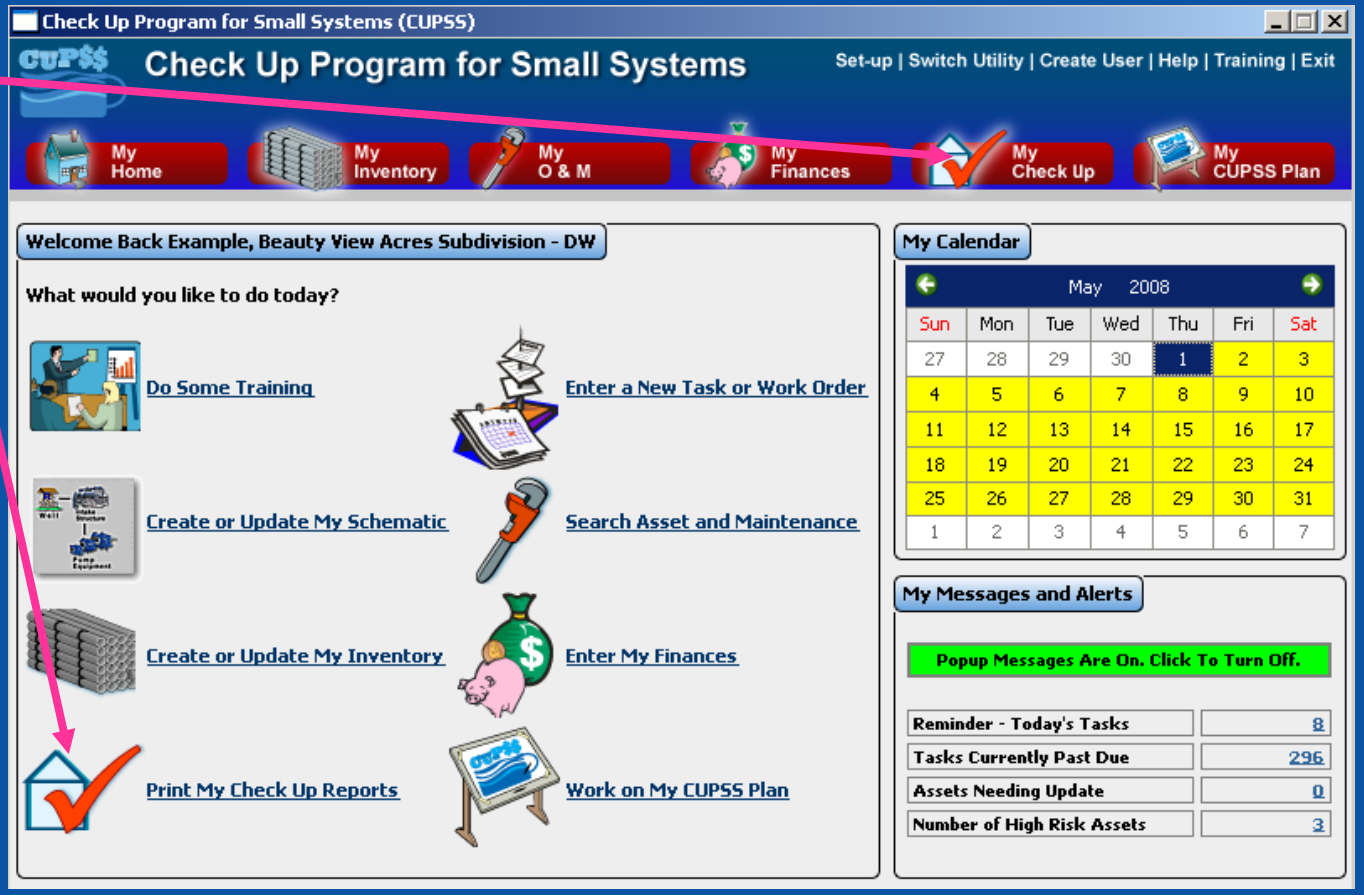
Think about the Asset Management Plan

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

Why Identify Critical Assets

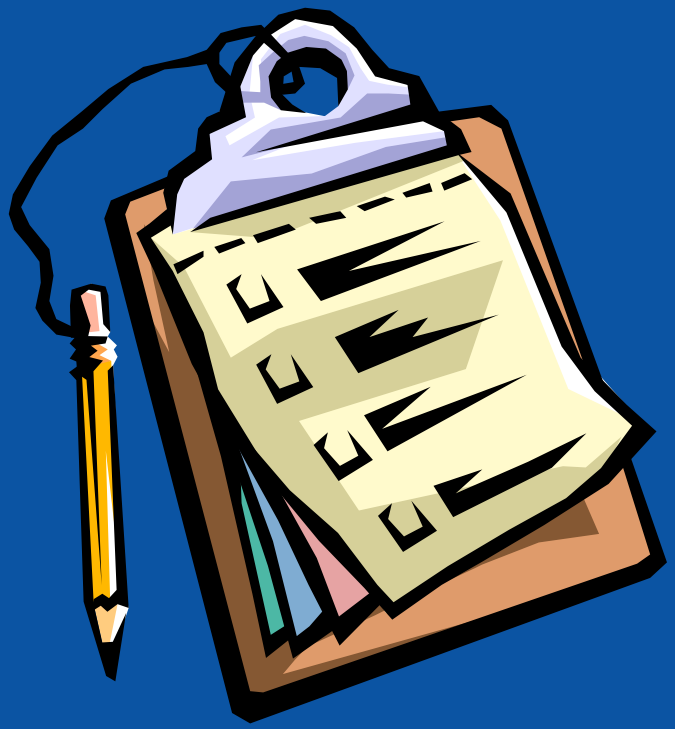
- Understand the risk of a critical asset failing
- Prioritize maintenance work based on an asset's consequence of failure
- Identify redundancy, or lack thereof, within the utility

Navigate to My Asset Check Up



CUPSS Example

My Asset Check Up Report Exercise



CUPSS Example

Q&A on My Asset Check Up Report

Today's Agenda

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

Your CUPSS

1) My Inventory page

Inventory List

1.1) Add two additional assets to the inventory list for ‘Beauty View Acres Subdivision – DW’ through the Asset Inventory form

1.2) Add two additional assets to the inventory list through the Asset Import template

1.3) Change one daily task to a weekly task

Schematic

1.3) Delete one asset in the schematic

1.4) Add two new assets in the schematic

- Link these two assets with the drawing tool

2) Help page

2.1) Search for term ‘inventory’

3) My Asset Report page

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

Agenda for Session 2

Sneak Peak!

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

Join Us for Session 2

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

Thursday, May 7, 2015

1-3pm EDT

www.epa.gov/cupss

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