

Version 25



Trapeze

Enterprise Asset Management

Equipment Planning

User Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Equipment Planning - User Guide

Version 25.x

February 2025

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1. Overview

The Equipment Planning Module is designed as an easy to use, browser-based interface to assist with replacing dated equipment and adding new equipment to an organization.

Requirements

Application 25.x

Web Modules 25.x

Notifications Module and MAXQueue 25.x if notifications are to be sent.

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

-  User defined required fields that do not appear in the Web Modules will return validation messages.
-  Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Understanding the Module

Equipment Planning provides organizations with a means to facilitate the equipment replacement/addition process. Equipment Planning allows users to enter, update, and view equipment information and equipment procurement data. The module also follows equipment through the entire review and approval process for equipment acquisition and replacement.



Equipment Planning may be used in conjunction with the Notifications Module so users are notified when specific equipment procurement events occur.

The steps below provide instructions to use the module.

Equipment Planning Module

Click the Equipment Planning tab to display the Equipment Planning Module Page.

Equipment Planning Portal							
2007 Planning Summary							
Department	Equipment Units	Replacement Candidates	PROJECTS				
			Requested	Planned	Planned Waiting My Approval	Active	All
* 414 - EVERETT REPAIR FACILITY	169	6 / 18	3	8	0	1	16
KADEPT2 - DEPARTMENT 2	75	0 / 0	0	0	0	0	0
KADEPTP - KARL'S MOTOR POOL DEPT	15	0 / 0	0	0	0	0	0

*Current Department

Department 414 Quick Actions

Equipment List Replacement List Project List

Planning Summary Section

This section of the page provides summary information for all the departments supported by the user.



Note: An asterisk in the far left column indicates the user's current department.

- **Department:** Each department supported by the user appears in the list.
- **Equipment Units:** The total number of equipment units for each department is indicated in this column. Click the button to go to the Current Equipment page. See the [Current Equipment Page](#) section below for more information about this page.
- **Replacement Candidates:** The numbers on the button (e.g., 6/18) represent how many Replacement Candidates (6) still need action (as indicated by **[edit]** next to the Equipment ID on the Equipment Replacements and Additions page) out of the total number of Replacement Candidates (18). Click the button to go to the Equipment Replacements and Additions page. See the [Equipment Replacements and Additions Page](#) section below for more information about this page.

- **Projects:** The numbers of projects in various stages are listed in each column (i.e., Requested, Planned, Planned Waiting My Approval, Active, and All). Click on the desired button to go to the respective project list page. See the [Projects Page](#) section below for more information about the main Projects page.

Department Quick Actions

This section allows the user to click a button and automatically go to the desired page.

- **Equipment List:** Click this button to go to the Current Equipment page. See the Current Equipment section below for more information about this page.
- **Replacement List:** Click this button to go to the Replacements and Additions page. See the Replacements and Additions Page section below for more information about this page.
- **Project List:** Click this button to go to the Projects page. See the Projects Page section below for more information about this page.

Current Equipment Page

Upon clicking the **Equipment List** button (or the button in the Equipment Units column for your desired department) on the Main Equipment Planning Module Page, you are taken to the Current Equipment page.

This page supports the manual process of flagging existing assets for replacement, and the processes of viewing and fine-tuning batch-loaded data.

Users can list all active equipment units in a given department by selecting the department from the Department dropdown box. The list of departments is based upon that user's employee's supported departments. This list of equipment units includes basic information about each unit, and a checkbox that is used to (a) flag one or more units for replacement, and (b) indicate which units are already flagged for replacement. (Un-flagging units for replacement is performed on a separate page, the [Equipment Replacements and Additions Page](#).)

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
No filter defined.
Define Filter Reset Filter

Actions
Back Flag for Replacement View Replacements

Fleet Equipment Screen

Equipment Units Section

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code	
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0	
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1		
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		

Current Filter
No filter defined.

Define Filter Reset Filter

Actions
Back Flag for Replacement View Replacements

Fleet Equipment Screen

This section provides a list of all the active equipment units in your department and their identifying information including: Equipment ID, Year, Make, Model, Maintenance Class, Equipment Type, Age, Years Owned, Replace Code, and Disposal Comment. Each column in this section may be sorted by clicking on the column title. (Use the scroll bar at the bottom of the list to view the columns on the right.) The default sort for this list of equipment units is vehicle age (e.g., current year minus model year). Hover-over text is also provided in some of the columns to give more detail about the Equipment ID.

In the Equipment Units section, the box in the far-left side of the section is used to (a) flag one or more units for replacement, and (b) indicate which units are already flagged for replacement. The scroll bar at the far-right side of this section allows you to scroll down to view all the equipment units in the list.

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		
☒	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		
☐	C-1004	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		
☒	C-1003	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		
☒	C-1005	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		
☐	A-1006	2010	CHVRL	MALIBU	12	MALIBU	2	3		

➡ To learn more about an Equipment Unit, click on the **Equipment ID**.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code	
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0	
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1		
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3		
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		

Current Filter
No filter defined.

Define Filter Reset Filter

Actions
Back Flag for Replacement View Replacements

Fleet Equipment Screen

The Equipment Details page displays.

Equipment Details			
Equipment ID	101H-2007 CHEVROLET 1500 CREW CAB GRAY	Latest meter reading	20146 MILES
Description	2007 SILVERADO 1500 4X4 CREW CAB		
Model Year	2007	Make	CHVRL
Maintenance Class	32 - TRUCK THRU 1/2T	Model	1500 CREW CAB
Rental Rates Class	32 - TRUCK THRU 1/2T	Equipment Type	07-CHVRL-1500 C
Vehicle Age	5	Years in Service	5
Lease Rate		Budget Amount	
Asset number		Next PM Due At	19992 MILES
Serial number	2GCEK133271664150	Next PM Date	08/08/2008
License number	G69676	Service Due	A - PM-A
Registration expiration date		Next Inspection	
Life cycle status code ID	A - ACTIVE	Assigned PM	EG - PINO HVY EQ GARAGE
Service status		Assigned repair	EG - PINO HVY EQ GARAGE
Warranty Status	NOT UNDER WARRANTY	Stored	BL - POL-CIB
Department ID	1000 - MOTORPOOL DEPARTMENT	Station	BL - POL-CIB
Department to notify for PM	POL - POLICE	Current	
Equipment Management			
Fleet Equipment Screen			
Back			

Equipment Details Page

1. Click the Equipment ID in the Current Equipment List to display the Equipment Details page.

The Equipment Details page cannot be modified here. This page is only for viewing information.

2. If the Enterprise Portal is installed, click the **Fleet Equipment Screen** link to open the Fleet Equipment screen.

Equipment Details			
Equipment ID	101H-2007 CHEVROLET 1500 CREW CAB GRAY	Latest meter reading	20146 MILES
Description	2007 SILVERADO 1500 4X4 CREW CAB		
Model Year	2007	Make	CHVRL
Maintenance Class	32 - TRUCK THRU 1/2T	Model	1500 CREW CAB
Rental Rates Class	32 - TRUCK THRU 1/2T	Equipment Type	07-CHVRL-1500 C
Vehicle Age	5	Years in Service	5
Lease Rate		Budget Amount	
Asset number		Next PM Due At	19992 MILES
Serial number	2GCEK133271664150	Next PM Date	08/08/2008
License number	G69676	Service Due	A - PM-A
Registration expiration date		Next Inspection	
Life cycle status code ID	A - ACTIVE	Assigned PM	EG - PINO HVY EQ GARAGE
Service status		Assigned repair	EG - PINO HVY EQ GARAGE
Warranty Status	NOT UNDER WARRANTY	Stored	BL - POL-CIB
Department ID	1000 - MOTORPOOL DEPARTMENT	Station	BL - POL-CIB
Department to notify for PM	POL - POLICE	Current	
Equipment Management			
Fleet Equipment Screen			
Back			

The Fleet Equipment screen displays.

Fleet Equipment Preferences Help

Filter Sort NEW COPY DB UNDO

Row #	Equipment ID	Model year	Manufacturer ID	Model ID	Equipment description	License number
1	101H	2007	CHVRL	1500 CREW CAB	2007 SILVERADO 1500 4X4 CREW CAB	G69676

Equipment ID: 101H 2007 CHVRL 1500 CREW CAB 2007 SILVER New equipment unit

Basic Info

Model year: 2007
 Manufacturer ID: CHVRL CHEVROLET
 Model ID: 1500 CREW CAB
 Equipment type: 07-CHVRL-1500 C 2007 CHEVROLET 1500 C
 PM program type: CLASS, INDIVIDUAL, NONE

Description: 2007 SILVERADO 1500 4X4 CREW CAB
 Color: GRAY
 Serial number: 2GCEK133271664150
 Asset number:
 Associated file:
 Path and file name:
 Description:

Meter Info

Equipment class for meter types: 32 TRUCK THRU 1/2T
 Meter information: Meter 1: 10 MILES, Meter 2: NONE
 Meter at delivery: 20146
 Latest meter reading: 20146

Row #	Delete	Date	Meter number	Reason

- Click the **Back** button to go back to the Current Equipment Page.

Equipment Details

Equipment ID	101H.2007 CHEVROLET 1500 CREW CAB GRAY	Latest meter reading	20146 MILES
Description	2007 SILVERADO 1500 4X4 CREW CAB		
Model Year	2007	Make	CHVRL
Maintenance Class	32 - TRUCK THRU 1/2T	Model	1500 CREW CAB
Rental Rates Class	32 - TRUCK THRU 1/2T	Equipment Type	07-CHVRL-1500 C
Vehicle Age	5	Years in Service	5
Lease Rate		Budget Amount	
Asset number		Next PM Due At	19992 MILES
Serial number	2GCEK133271664150	Next PM Date	08/08/2008
License number	G69676	Service Due	A - PM-A
Registration expiration date		Next Inspection	
Life cycle status code ID	A - ACTIVE	Assigned PM	EG - PINO HVY EQ GARAGE
Service status		Assigned repair	EG - PINO HVY EQ GARAGE
Warranty Status	NOT UNDER WARRANTY	Stored	BL - POL-CIB
Department ID	1000 - MOTORPOOL DEPARTMENT	Station	BL - POL-CIB
Department to notify for PM	POL - POLICE	Current	

Equipment Management
 Fleet Equipment Screen

Back

Current Equipment Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐ 101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒ A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒ A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐ C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
 No filter defined.

Define Filter Reset Filter

Actions
 Back Flag for Replacement View Replacements

Fleet Equipment Screen

Current Filter Section

Data in the Equipment Units list is always restricted by the currently-selected department. The data may be further restricted in the Current Filter section as shown in the following screenshot.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
No filter defined.

Define Filter Reset Filter

Actions
Back Flag for Replacement View Replacements

Fleet Equipment Screen

1. In this section, you may define a filter to narrow your equipment list by clicking on the **Define Filter** button.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
No filter defined.

Define Filter Reset Filter

Actions
Back Flag for Replacement View Replacements

Fleet Equipment Screen

The Equipment Filters page displays.

Equipment Filters

Equipment ID		...	Assigned PM Location		...
Model Year		...	Assigned Repair Location		...
Manufacturer		...	Station Location		...
Model		...	Stored Location		...
Equipment Type		...	Operator ID		...
Serial Number		...	Account ID		...
Maintenance Class		...	Life Cycle Status		...
Rental Class		...	Fuel Card ID		...
Asset Category		...	License		...

Actions
Back Clear Filter Apply Filter

2. Populate the filter fields with desired data and click the **Apply Filter** button.

Equipment Filters

Equipment ID		Assigned PM Location	
Model Year	2010	Assigned Repair Location	
Manufacturer		Station Location	
Model		Stored Location	
Equipment Type		Operator ID	
Serial Number		Account ID	
Maintenance Class		Life Cycle Status	
Rental Class		Fuel Card ID	
Asset Category		License	

Actions

The resulting Current Equipment page displays with your filtered request.

Current Equipment

Department:

Equipment Units: 12

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	
☒	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

Model Year: 2010

Actions

Fleet Equipment Screen

- Click the **Reset Filter** button to remove your filter settings.

Current Equipment

Department:

Equipment Units: 12

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	
☒	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

Model Year: 2010

Actions

Fleet Equipment Screen

The unfiltered Current Equipment list displays.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

Actions Section

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

The Actions section of the page provides you with the ability to click a button and automatically go to the desired page as mentioned in the following sections.

Back Button

➡ Click the **Back** button to go back to the Main Equipment Planning Module Page.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

The Main Equipment Planning Module Page displays.

Equipment Planning
Planning Summary

Department	Equipment Units	Replacement Candidates	PROJECTS				
			Requested	Planned	Planned Waiting My Approval	Active	All
-	0	0 / 0	0	0	0	0	0
* 1000 - MOTORPOOL DEPARTMENT	13	5 / 5	0	0	0	0	0
2000 - MAINTENANCE DEPARTMENT	0	0 / 0	0	0	0	0	0
AUD - INTERNAL AUDIT	0	0 / 0	0	0	0	0	0
AVI - AVIATION	3	0 / 0	0	0	0	0	0
AVI-ADMIN - AVIATION ADMINISTRATION	8	0 / 0	0	0	0	0	0
AVI-AF - AVIATION AIRFIELD MAINTENANCE	63	0 / 0	0	0	0	0	0
AVI-BMX - AVIATION BUILDING MAINTENANCE	12	0 / 0	0	0	0	0	0
AVI-DEII - AVIATION DOUBLE EAGLE II	15	0 / 0	0	0	0	0	0
AVI-OPS - AVIATION OPERATIONS	5	0 / 0	0	0	0	0	0

*Current Department

Department 1000 Quick Actions

Equipment List Replacement List Project List

Flag for Replacement Button

A unit may be selected for replacement only if both of the following are true:

- The unit is not already flagged for replacement in the current budget year
- There is not an active project for that unit (active means any non-canceled project that replaces the unit).

To flag an equipment unit for replacement:

- ➡ Select the unit for replacement by placing a check in the (enabled) box to the left of the Equipment ID. Then click the **Flag for Replacement** button.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐ 101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒ A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒ A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐ A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐ C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

A message displays to indicate units were flagged for replacement.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment units flagged for replacement

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

 Note: If you click the button without selecting an equipment unit first, a message displays to remind you to select items prior to clicking the button as shown in the screenshot below.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Please select some items first.

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements

Fleet Equipment Screen

View Replacements Button

 Click the **View Replacements** button to open the [Equipment Replacements and Additions](#) page as discussed in the section following below.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
☐	101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒	A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒	A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒	A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐	C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter

No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement **View Replacements**

Fleet Equipment Screen

Fleet Equipment Screen Link

A Fleet Equipment Screen link is available if your organization has the Enterprise Portal installed.

➡ Click the **Fleet Equipment Screen** link to open the Fleet Equipment screen.

Current Equipment

Department: 1000 - MOTORPOOL DEPARTMENT

Equipment Units: 13

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Replace Code
101H	2007	CHVRL	1500 CREW CAB	32	07-CHVRL-1500 C	5	5	0
☒ A-1005	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1000	2010	CHVRL	MALIBU	12	MALIBU	2	1	
☒ A-1004	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1003	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☒ A-1002	2010	CHVRL	MALIBU	12	MALIBU	2	3	
☐ C-1000	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2	

Current Filter
No filter defined.

Define Filter Reset Filter

Actions

Back Flag for Replacement View Replacements **Fleet Equipment Screen**

The Fleet Equipment screen displays.

Fleet Equipment Preferences Help

Filter Sort NEW COPY DB UNDO

Row #	Equipment ID	Model year	Manufacturer ID	Model ID	Equipment description	License number
Equipment ID New equipment unit						

Basic Info

Model year PM program type
CLASS
INDIVIDUAL
NONE

Manufacturer ID Model ID Equipment type

Description Color Serial number Asset number Associated file

Path and file name Description

Meter Info

Equipment class for meter types Meter 1 Meter 2

Meter information Meter resets

Row #	Delete	Date	Meter number	Reason

Meter at delivery Latest meter reading Latest meter source Latest meter date Maximum meter value

999999 99999 999999 99999

Equipment Replacements and Additions Page

1. Click the **Replacements List** button or the button in the Replacement Candidates column on the Main Equipment Planning Module Page, you are taken to the Equipment Replacements and Additions Page.

The Equipment Replacements and Additions page lists all the equipment units that have an open project for the budget year. It includes the following types of assets:

- Existing assets that are flagged for replacement
- Incremental (new) assets.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 6

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions

Back Fleet Addition View Projects

Actions for Selected Items

Create Project(s) Remove from List

- On this page, click the column titles to sort the columns as needed. The fields **Equipment ID**, **Make**, **Maintenance Class**, **Equipment Type**, **Template**, **Project**, and **User Added** offer hover-over text that provides a description of the item as shown in the screenshot below.

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

- Check the checkbox (when available) in the far left column to select the specific equipment ID. This allows you to and either Create a Project or Remove it from the List by clicking the appropriate button in the Actions for Selected Items section at the bottom, right portion of the page. See [Create Project\(s\)](#) and [Remove from List](#) sections below for more information about these actions.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 6

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☒	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions

Back Fleet Addition View Projects

Actions for Selected Items

Create Project(s) Remove from List

Department Drop-down

Your currently supported department displays in the dropdown box. Select a different department from the dropdown box to view replacements and additions in another department.

Replacement Report Link

Click the [Replacement Report](#) link to open the Crystal Replacement Report as configured by the administrator.

Equipment Units Section

The Equipment Units section lists the equipment units that already have an open project for the budget year.

Equipment Units: 6

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

When the Equipment ID has [\[edit\]](#) next to it, it has not been assigned to a project. Click the [\[edit\]](#) link to go to the Fleet Replacement/Addition page to edit the Replacement Candidate as described in the following section.

Fleet Replacement

1. Click the [\[edit\]](#) link next to the Equipment ID to designate an equipment unit for replacement.

Equipment Units: 6

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

You are taken to the Fleet Replacement/Addition page.

Fleet Replacement / Addition	
Department ID	1000
Budget Year	2011
Equipment Replaced	A-1003
Maint. Class Replaced	12
Template	...
Model year	2010
Manufacturer ID	CHVRL - CHEVROLET
Model ID	MALIBU - MALIBU
Priority	3
Justification	
Actions Back Save	

 This page is similar to the one used for additions. When **Equipment Replaced** and **Maint. Class Replaced** fields *are* displayed on this page, it is indicative of a replacement. Otherwise, when the **Equipment Replaced** and **Maint. Class Replaced** fields *are not* visible on this page, it is indicative of an addition.

2. On this page, the following fields are available for editing:
 - **Template:** This is the template for the project as defined by the Maintenance Class. It defines the default information for the current budget year as located in the GUI (Data > Equipment Management > Planning > Templates). If the template is specified in advance, all required project fields have default fields so the user does not need to make changes unless desired.
 - **Priority:** Priority may be set as BLANK, or 1-5 with 1 being the highest. Setting the priority helps to determine which replacements are more important.
 - **Justification:** Justification is not required if the project is preapproved or if the project does not fail the specified Justification Rule as determined by the organization. For more information regarding the Justification Rule refer to the Equipment Planning Module Administrator Guide. A highlighted Justification box indicates that justification is required (as set in the configuration settings). This only comes into effect on the Projects Page.
3. To edit the replacement, complete the fields as desired and click **Save**.

Current Filter Section

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 6

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐ A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐ A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐ A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐ A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐ C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI
☐ C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3		MAI

Current Filter

Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions

Back Fleet Addition View Projects

Actions for Selected Items

Create Project(s) Remove from List

This section allows you to shrink the replacement/addition candidate list to only those you desire. The data in the list is always restricted by the currently selected department. Follow the steps below to filter the list.

1. Click the **Define Filter** button define a new filter.

You are taken to the Replacement Item Filters page.

Replacement Item Filters

Equipment ID ...

Model Year ▼

Make ...

Model ...

Equipment Type ...

Maint. Class ...

Budget Year 2011

User Added ...

Priority [ALL] ▼

Actions

Back Clear Filter Apply Filter

 The Budget Year defaults to the current budget year, but is editable to allow viewing of prior year's candidates.

2. Complete the desired filters and click **Apply Filter**.

Replacement Item Filters

Equipment ID **A-1005** ... Maint. Class ...

Model Year ... Budget Year 2011

Make ... User Added ...

Model ... Priority [ALL] v

Equipment Type ...

Actions

Back Clear Filter **Apply Filter**

The Equipment Replacements and Additions page reappears and the filtered list is displayed.

Equipment Replacements and Additions Department: 1000 - MOTORPOOL DEPARTMENT Replacement Report

Equipment Units: 1

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐ A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3 v		MAI

Current Filter
Priority: [ALL], Budget Year: 2011, Equipment ID: A-1005

Define Filter Reset Filter

Actions Back Fleet Addition View Projects

Actions for Selected Items Create Project(s) Remove from List

- Click the **Reset Filter** button to reset back to the default filter.

Actions Section

Equipment Replacements and Additions Department: 1000 - MOTORPOOL DEPARTMENT Replacement Report

Equipment Units: 1

Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐ A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3 v		MAI

Current Filter
Priority: [ALL], Budget Year: 2011, Equipment ID: A-1005

Define Filter Reset Filter

Actions Back Fleet Addition View Projects

Actions for Selected Items Create Project(s) Remove from List

This section of the page contains buttons that take you to different pages to assist with desired fleet actions.

Back Button

 Click the **Back** button to go back to the Current Equipment page.

Fleet Addition Button

Follow the steps below to create a fleet addition.

1. Click the **Fleet Addition** button to go to the Fleet Replacement/Addition page.

Fleet Replacement / Addition	
Department ID	1000
Budget Year	2011
Template	...
Model year	
Manufacturer ID	▼
Model ID	▼
Priority	▼
Justification	
Actions	
Back	Save

Use this page to add incremental (new) units to the replacements/additions page. You can also edit line items for when a project has not been created. It may be used to enter necessary attributes (such as template [which defines equipment class], justification, or priority) so that it can be added to a project later as equipment is requested, and ultimately be added as a shell equipment record.



This page is similar to the one used for replacements. When **Equipment Replaced** and **Maint. Class Replaced** fields are not displayed on this page, it is indicative of an addition. Otherwise, when the **Equipment Replaced** and **Maint. Class Replaced** fields are visible on this page, it is indicative of a replacement.

2. Complete the desired fields and click **Save** to save or create the line item, and return to the Replacements and Additions page.

Fleet Replacement / Addition	
Department ID	1000
Budget Year	2011
Template	...
Model year	2011
Manufacturer ID	DODGE - DODGE ▼
Model ID	1/2T - 1/2T ▼
Priority	1 ▼
Justification	Requires an additional part
Actions	
Back	Save

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions Back Fleet Addition View Projects

Actions for Selected Items Create Project(s) Remove from List

The addition/line item displays in the Equipment Units list and the total Equipment Units listed has increased by one.

View Projects Button

➡ Click the **View Projects** button to go to the Projects page.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions Back Fleet Addition **View Projects**

Actions for Selected Items Create Project(s) Remove from List

The Projects page displays.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

Current Filter
Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Actions Back New Project

Estimated Cost

Total Cost of Listed Projects:	\$ 100,000.00
New Equip Lease Total (\$/mo):	\$ 1,200.00
Current Lease Total (\$/mo):	\$ 0.00
Difference:	\$ 1,200.00

Actions for Selected Projects Approve Cancel

For more information about this page, please refer to the [Projects Page](#) section below.

Actions for Selected Items

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☐	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter

Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions

Back Fleet Addition View Projects

Actions for Selected Items

Create Project(s) Remove from List

The Actions for Selected Items section of the Current Equipment page is where the user selects the Equipment ID by placing a check in the box to the left of the column and clicks on the desired button as explained below.

Create Project(s) Button

The **Create Project(s)** button allows you to create a project for a particular equipment unit.

Follow the steps below to create a project:

1. To create a project for an Equipment ID, select the equipment unit by placing a check in the far, left box and click on the **Create Project(s)** button.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☒	C-1002 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions

Back Fleet Addition View Projects

Actions for Selected Items

Create Project(s) Remove from List

You are taken to the Project Basic Info page to enter applicable project details.

Project Basic Info

Project ID 2011-1 Budget year 2011

Purpose REPLACEMENT Purchase year 2010

Exception Status REQUEST

Description

Equipment Replaced C-1002 CHEV. CAVALIER 4 DOOR SEDAN

Project template ID ...

Department ID 1000 MOTORPOOL DEPARTMENT

Requesting user ID MOLLYT ... MARY SMITH

Originating location ID 1000 ... FULL SERVICE SHOP

Destination location ID 1000 ... FULL SERVICE SHOP

Actions

Back Save

2. After entering the needed details, click **Save**.

Project Basic Info

Project ID	2011-1	Budget year	2011
Purpose	REPLACEMENT	Purchase year	2010
Exception		Status	REQUEST
Description	template for rannis		
Equipment Replaced	C-1002 CHEV. CAVALIER 4 DOOR SEDAN		
Project template ID	DIESEL 84-87		
Department ID	1000 MOTORPOOL DEPARTMENT		
Requesting user ID	MOLLYT	... MARY SMITH	
Originating location ID	1000	... FULL SERVICE SHOP	
Destination location ID	1000	... FULL SERVICE SHOP	

Actions

Back Save

You are returned to the Equipment Replacements and Additions page and the project has been created as indicated by the grayed out selection box next to the Equipment ID column.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☐	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		2011-1	3	
☐	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions
Back Fleet Addition View Projects

Actions for Selected Items
Create Project(s) Remove from List

Remove from List Button

➡ To remove an addition/replacement from the list, select the desired equipment unit and click **Remove from List**.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Equipment Units: 7

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3	
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3	
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART
☒	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		2011-1	3	
☒	C-1003 [edit]	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2			3	

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions
Back Fleet Addition View Projects

Actions for Selected Items
Create Project(s) Remove from List

A message indicates successful removal of the replacement/addition and the total Equipment Units decreased.

Equipment Replacements and Additions

Department: 1000 - MOTORPOOL DEPARTMENT

Replacement Report

Replacement candidates removed

Equipment Units: 6

	Equipment ID	Year	Make	Model	Maint. Class	Equip. Type	Age	Years Owned	Template	Project	Priority	Justification	U
☐	A-1000 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	1			3		MAI
☐	A-1003 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1004 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	A-1005 [edit]	2010	CHVRL	MALIBU	12	MALIBU	2	3			3		MAI
☐	ADDITION [edit]	2011	DODGE	1/2T			1				1	REQUIRES AN ADDITIONAL PART	MAI
☐	C-1002	2010	CHVRL	CAVALIER	M-1000	CAVALIER	2	2		2011-1	3		MAI

Current Filter
Priority: [ALL], Budget Year: 2011

Define Filter Reset Filter

Actions
Back Fleet Addition View Projects

Actions for Selected Items
Create Project(s) Remove from List

Projects Page

Upon clicking the **Project List** button on the Main Equipment Planning Module Page and the **View Projects** button on the Replacements and Additions page, you are taken to the Projects Page.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐ 1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

Current Filter
Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Actions
Back New Project

Estimated Cost

Total Cost of Listed Projects:	\$ 100,000.00
New Equip Lease Total (\$/mo):	\$ 1,200.00
Current Lease Total (\$/mo):	\$ 0.00
Difference:	\$ 1,200.00

Actions for Selected Projects
Approve Cancel

On this page, the dropdown list of Department IDs is limited to the User's Associated Employee ID's Supported Departments. After selecting a Department ID, information indicated in the following sections is listed.

- ✓ The actions available on this page are based upon the current filter, the user's authority, and the status of the projects listed. Accordingly, various buttons/actions may not be available to some users.

Projects Section

The Projects Section lists project information including: a Selection checkbox, Project ID, Template, Originating Location (receiving location), Destination Location (location the equipment will be delivered to for operator pick-up), Status, Purpose, User, Budget Year, Estimated Cost, Equipment Replaced, Lease Rate (from Template), and Approval Level.



Note: Some of the above mentioned attributes appear as hover-over text.

- ✓ The Approval Level column is highlighted for any projects that require justification based on the module settings. This highlighting continues after the project is justified to serve as a reminder to the user.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

Current Filter
Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Estimated Cost
Total Cost of Listed Projects: \$ 100,000.00
New Equip Lease Total (\$/mo): \$ 1,200.00
Current Lease Total (\$/mo): \$ 0.00
Difference: \$ 1,200.00

Actions
Back New Project

Actions for Selected Projects
Approve Cancel

Project ID Link

➔ Click on the **Project ID** link to view the project in greater detail.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

You are taken to the Project Info page.

Project Info

Project	1000-1 - NEEDS NEW PARTS			Purpose	REPLACEMENT	Budget year	2011
Template	1000 - TEMPLATE ID FOR 1000			Status	REQUEST	Purchase year	2010
Department	1000 - MOTORPOOL DEPARTMENT			Exception			
Origin Loc	1000 - FULL SERVICE SHOP			Requested By	MARY SMITH		
Destination Loc	1000 - FULL SERVICE SHOP			Lease Rate	\$600.00	Approval Level	
Budget Amount	\$50,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$50,000.00

Options

Subsystem	Property	Description	Cost	Requested By	Comment
Justification Comments					

Equipment Requested

Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date
Equipment Replaced						

Back Edit Basic Info Cancel Project Approve Project

This page provides information about various aspects of the project as outlined in the [Project Info Page](#) section below.

Template Link and Template Detail Page

➡ Click the Template link to go to the Template Detail page.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 1000-1	1000-1	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐ 1000-3	1000-3	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

TEMPLATE ID FOR 1000

The Template Detail page displays.

Template Detail

Project template ID	2007-7500 SERIES	Date and time added	02/28/2007 16:37
Description	2007 TEMPLATE FOR 7500 SERIES	Date and time activated	02/28/2007 16:37
Budget year	2007	Purchase year	2007
Lease rate	\$980.00	Budget Amount	\$32000.00
MRF	1	Status	ACTIVE
Equipment class ID	7500 SERIES		
Associated Image			
Comments	7500 SERIES COMMENTS		

Features

Subsystem	Property	Description	Cost
DRIVETRAIN	4WD	4 WHEEL DRIVE ALL TIME	\$0.00
TRANSMISSION	MANUAL	MANUAL TRANSMISSION	\$0.00

Options

Subsystem	Property	Description	Cost
ACCESSORIES	AIR CONDITIONING	AIR CONDITIONING	\$1000.00
ACCESSORIES	AM/FM STEREO	AM/FM STEREO	\$100.00
ACCESSORIES	CD PLAYER	CD PLAYER	\$200.00
ACCESSORIES	MOON ROOF	MOON ROOF	\$750.00

Approval events required

Order	Event	Description	Comments
1	APPROVAL LEVEL 1	SUPERVISOR APPROVAL	
2	APPROVAL LEVEL 2	SUPERVISOR APPROVAL 2	
3	APPROVAL LEVEL 3	DIRECTOR APPROVAL	

Back

The Template Detail page displays the following fields:

- Project template ID
- Date and time Added
- Description
- Date and time activated
- Budget year
- Purchase year
- Lease rate
- Budget amount
- MRF
- Equipment Class ID
- Status

- Link to related file or image (the associated file on the Project Templates screen via the GUI)
- Template Comments
- Features
- Options
- Approval Events Required

The only **Action** button on this page is the **Back** button which returns you to the Projects Summary page.

Equip Replaced Link and Equipment Details Page

1. Click the **Equip Replaced** link to go to the Equipment Details page.

Projects											
Department: 1000 - MOTORPOOL DEPARTMENT											
Projects: 2											
	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	50,000.00	A-1000-1	600.00
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	50,000.00	10.00	600.00

The Equipment Details page displays.

Equipment Details			
Equipment ID	A-1000-2010 CHEVROLET MALIBU WHITE	Latest meter reading	35000 MILES
Description	CHEV. MALIBU 4 DOOR SEDAN		
Model Year	2010	Make	CHVRL
Maintenance Class	12 - AUTOMOBILE	Model	MALIBU
Rental Rates Class	12 - AUTOMOBILE	Equipment Type	MALIBU
Vehicle Age	2	Years in Service	1
Lease Rate		Budget Amount	
Asset number	CHEV-MALIBU01	Next PM Due At	5000 MILES
Serial number	A-1000-CHEVMALIBU01	Next PM Date	07/23/2012
License number	54241X23	Service Due	A - PM-A
Registration expiration date	12/31/2012	Next Inspection	
Life cycle status code ID	A - ACTIVE	Assigned PM	1000 - FULL SERVICE SHOP
Service status		Assigned repair	1000 - FULL SERVICE SHOP
Warranty Status	UNDER WARRANTY		
Department ID	1000 - MOTORPOOL DEPARTMENT	Stored	
Department to notify for PM	1000 - MOTORPOOL DEPARTMENT	Station	
		Current	
Equipment Management			
Fleet Equipment Screen			
Back			

This page displays equipment details and allows you to access the Fleet Equipment page by clicking the Fleet Equipment Screen link.

2. Click **Back** to go to the Project Summary page.

Current Filter Section

The Current Filter section displays the current filter used for the project list as well as the ability to define or reset the filter and, if applicable, list the approvals for the signed in user. The projects displayed in the list depend on the current filter. The current filter is indicated in red.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

Current Filter

Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects: \$ 100,000.00

New Equip Lease Total (\$/mo): \$ 1,200.00

Current Lease Total (\$/mo): \$ 0.00

Difference: \$ 1,200.00

Actions

Back New Project

Actions for Selected Projects

Approve Cancel

Define Filter Button

To define the filter:

1. Click the **Define Filter** button to change the list's filter.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	\$0,000.00	101H	600.00	

Current Filter

Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects: \$ 100,000.00

New Equip Lease Total (\$/mo): \$ 1,200.00

Current Lease Total (\$/mo): \$ 0.00

Difference: \$ 1,200.00

Actions

Back New Project

Actions for Selected Projects

Approve Cancel

The Project Filters page displays.

Project Filters

Project ID Equipment Replaced ...

Purpose Originating location ID ...

Status Destination location ID ...

Budget year Purchase year

Project template ID ... Requesting user ID ...

Actions

2. On this page, you can search all projects for their supported departments, or retrieve projects from previous years.
3. Complete the desired fields and click **Apply Filter**.
 - If needed, the **Clear Filter** button clears all the filter fields.

Project Filters

Project ID Equipment Replaced ...

Purpose Originating location ID ...

Status Destination location ID ...

Budget year Purchase year

Project template ID ... Requesting user ID ...

Actions

The status (in red) is updated and the projects list displays the new list based on the defined filter.

Projects

Department:

Projects: 1

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	\$0,000.00	A-1000	600.00	

Current Filter

Equipment Replaced: A-1000, Budget Year: 2011, Status: REQUEST

Estimated Cost

Total Cost of Listed Projects:	\$	50,000.00
New Equip Lease Total (\$/mo):	\$	600.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	600.00

Actions

Actions for Selected Projects

Reset Filter Button

➡ To reset the filter to the default, click the **Reset Filter** button.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 1

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	50,000.00	A-1000	600.00	

Current Filter
Equipment Replaced: A-1000, Budget Year: 2011, Status: REQUEST

Define Filter **Reset Filter** My Approvals

Estimated Cost

Total Cost of Listed Projects:	\$	50,000.00
New Equip Lease Total (\$/mo):	\$	600.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	600.00

Actions

Back New Project

Actions for Selected Projects

Approve Cancel

The Projects list displays according to the default filter information.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	50,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	50,000.00	101H	600.00	

Current Filter
Status: REQUEST, Budget Year: 2011

Define Filter **Reset Filter** My Approvals

Estimated Cost

Total Cost of Listed Projects:	\$	100,000.00
New Equip Lease Total (\$/mo):	\$	1,200.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	1,200.00

Actions

Back New Project

Actions for Selected Projects

Approve Cancel

My Approvals Button

The **My Approvals** button displays if there are planned projects whose next required approval event is authorized as a primary approval event for the logged in employee.

➡ Click the **My Approvals** button to display the list of **PLANNED** projects that require your approval.

Projects

Department: 414 - EVERETT REPAIR FACILITY

Projects: 4

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 2007-184	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8519	1,000.00	
☐ 2007-185	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8520	1,000.00	
☐ 2007-186	RATESTTEMP	KALOC1	KALOC1	REQUEST	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	0.00	8510	0.00	
☐ 2007-201	DIESEL 84-87 - 2007	LMLOC2	LMLOC2	REQUEST	REPLACEMENT	MOLLYS TEST ID	2007	30,000.00	8517	600.00	

Current Filter
Status: REQUEST, Budget Year: 2007

Define Filter Reset Filter **My Approvals**

Actions
Back New Project

Estimated Cost
Total Cost of Listed Projects: \$ 120,000.00
New Equip Lease Total (\$/mo): \$ 2,600.00
Current Lease Total (\$/mo): \$ 2,400.00
Difference: \$ 200.00

Actions for Selected Projects
Request Approval Cancel

The status (in red) indicates the list contains the **PLANNED** Projects awaiting approval of the logged in employee.

Projects

Department: 414 - EVERETT REPAIR FACILITY

Projects: 6

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 2007-102	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8414	600.00	
☐ 2007-121	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8515	600.00	
☐ 2007-61	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8407	600.00	
☐ 2007-62	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8415	600.00	
☐ 2007-63	DIESEL 88-89 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	45,000.00	8509	1,000.00	
☐ 2007-81	DIESEL NOVA - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	50,000.00	8511	1,200.00	

Current Filter
Status: PLANNED, Approval Level: MY APPROVALS

Define Filter Reset Filter **My Approvals**

Actions
Back New Project

Estimated Cost
Total Cost of Listed Projects: \$ 215,000.00
New Equip Lease Total (\$/mo): \$ 4,600.00
Current Lease Total (\$/mo): \$ 3,600.00
Difference: \$ 1,000.00

Actions for Selected Projects
Approve Reject

Estimated Cost Section

The Estimated Cost section provides summary information from the displayed projects.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☒ 1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	50,000.00	A-1000	600.00	
☐ 1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	50,000.00	101H	600.00	

Current Filter
Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Actions
Back New Project

Estimated Cost

Total Cost of Listed Projects:	\$	100,000.00
New Equip Lease Total (\$/mo):	\$	1,200.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	1,200.00

Actions for Selected Projects
Approve Cancel

Estimated Cost		
Total Cost of Listed Projects:	\$	100,000.00
New Equip Lease Total (\$/mo):	\$	1,200.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	1,200.00

The following summary information is provided:

- **Total Cost of Listed Projects:** Sum of all cost estimates listed (base cost + features cost + options cost for each project).
- **New Equipment Lease Total (\$/Month):** Sum of all monthly lease rates listed, from template.
- **Current Lease Total (\$/Month):** Sum of all the current lease rates listed, from the template for equipment replaced.
- **Difference:** New equipment lease total minus current lease total.

Actions Section

In this section, the following actions are available:

- Back
- New Project

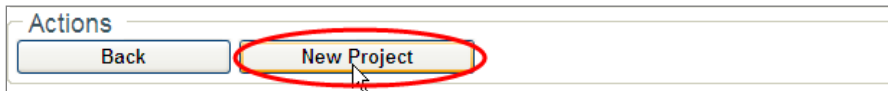
Back Button

Click the **Back** button to go to the Main Equipment Planning Summary Page.

New Project Button

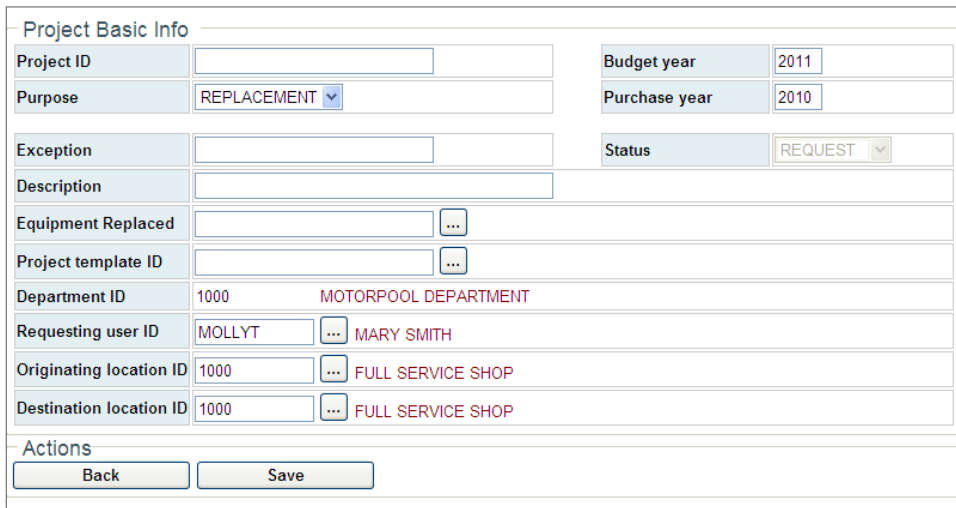
This button is provided for authorized users. Follow the steps below to create a new project.

1. Click the **New Project** button to go to the Project Basic Info page to create a project from scratch.



The screenshot shows a horizontal bar with the title 'Actions'. Inside the bar are two buttons: 'Back' and 'New Project'. The 'New Project' button is highlighted with a red circle, and a mouse cursor is pointing at it.

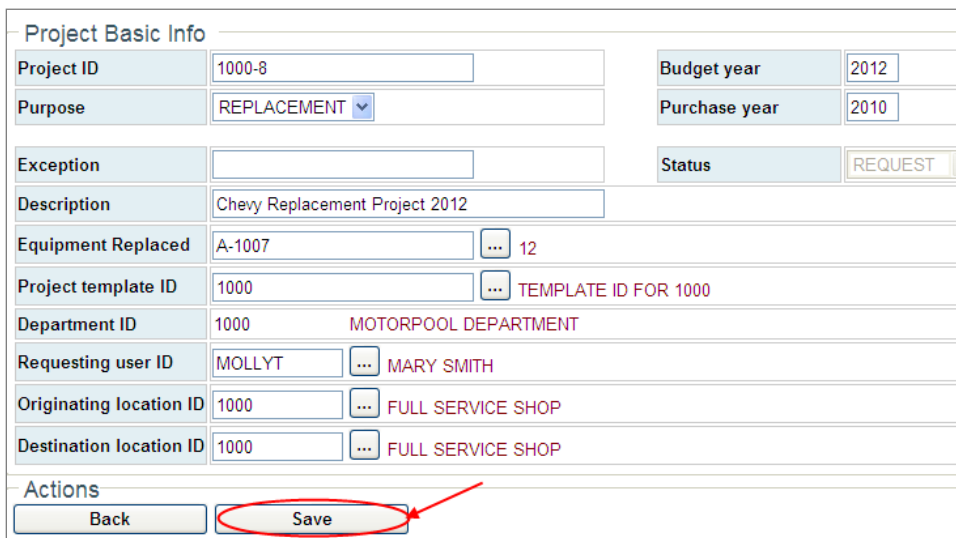
The Project Basic Info page displays.



The screenshot shows the 'Project Basic Info' form. It contains the following fields and controls:

- Project ID:** Text input field.
- Purpose:** Dropdown menu with 'REPLACEMENT' selected.
- Budget year:** Text input field with '2011'.
- Purchase year:** Text input field with '2010'.
- Exception:** Text input field.
- Status:** Dropdown menu with 'REQUEST' selected.
- Description:** Text input field.
- Equipment Replaced:** Text input field with a search icon (three dots).
- Project template ID:** Text input field with a search icon (three dots).
- Department ID:** Text input field with '1000' and 'MOTORPOOL DEPARTMENT'.
- Requesting user ID:** Text input field with 'MOLLYT' and a search icon (three dots) next to 'MARY SMITH'.
- Originating location ID:** Text input field with '1000' and a search icon (three dots) next to 'FULL SERVICE SHOP'.
- Destination location ID:** Text input field with '1000' and a search icon (three dots) next to 'FULL SERVICE SHOP'.
- Actions:** A bar at the bottom with 'Back' and 'Save' buttons.

2. Complete the desired fields and click the **Save** button to create a new project.



The screenshot shows the 'Project Basic Info' form with the following data entered:

- Project ID:** 1000-8
- Purpose:** REPLACEMENT
- Budget year:** 2012
- Purchase year:** 2010
- Exception:** (empty)
- Status:** REQUEST
- Description:** Chevy Replacement Project 2012
- Equipment Replaced:** A-1007 (with a search icon next to '12')
- Project template ID:** 1000 (with a search icon next to 'TEMPLATE ID FOR 1000')
- Department ID:** 1000 MOTORPOOL DEPARTMENT
- Requesting user ID:** MOLLYT (with a search icon next to 'MARY SMITH')
- Originating location ID:** 1000 (with a search icon next to 'FULL SERVICE SHOP')
- Destination location ID:** 1000 (with a search icon next to 'FULL SERVICE SHOP')
- Actions:** A bar at the bottom with 'Back' and 'Save' buttons. The 'Save' button is highlighted with a red circle and a red arrow points to it.

You are taken to the Project Info page. Please see the [Project Info Page](#) section below for further information about this page.

Actions for Selected Projects

The Actions for Selected Projects section allows users to select projects (using the checkbox) and click a button to **Request Approval** or **Cancel** the selected projects in REQUEST status or **Approve** or **Reject** multiple selected projects in PLANNED status.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 2

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	1000-1	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2011	50,000.00	A-1000	600.00	
☐	1000-3	1000	1000	1000	REQUEST	UPGRADE	MARY SMITH	2011	50,000.00	101H	600.00	

Current Filter

Status: REQUEST, Budget Year: 2011

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects: \$ 100,000.00

New Equip Lease Total (\$/mo): \$ 1,200.00

Current Lease Total (\$/mo): \$ 0.00

Difference: \$ 1,200.00

Actions

Back New Project

Actions for Selected Projects

Approve Cancel

Projects

Department: 414 - EVERETT REPAIR FACILITY

Projects: 7

	Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐	2007-102	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8414	600.00	
☐	2007-121	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8515	600.00	
☐	2007-5	CIN-PROJ-TEMPLO01	LM-MP1	LM-MP1	PLANNED	REPLACEMENT	RICHARD	2007	0.00	8404	0.00	
☐	2007-61	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8407	600.00	
☐	2007-62	DIESEL 84-87 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	30,000.00	8415	600.00	
☐	2007-63	DIESEL 88-89 - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	45,000.00	8509	1,000.00	
☐	2007-81	DIESEL NOVA - 2007	KALOC1	KALOC1	PLANNED	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	50,000.00	8511	1,200.00	

Current Filter

Status: PLANNED, Budget Year: 2007

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects: \$ 215,000.00

New Equip Lease Total (\$/mo): \$ 4,600.00

Current Lease Total (\$/mo): \$ 4,200.00

Difference: \$ 400.00

Actions

Back New Project

Actions for Selected Projects

Approve Reject

Request Approval Button

The **Request Approval** button allows users to request approval for selected projects. It changes the status of selected projects from REQUEST to PLANNED, locks down edits to Project Basic Info and Options and notifies the appropriate approvers.



Note: This action is only possible when the Project Status Filter = REQUEST.

To request approval for selected projects:

1. Select the desired projects by clicking the selection box and then click **Request Approval**.

Projects Department: 414 - EVERETT REPAIR FACILITY

Projects: 4

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 2007-184	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8519	1,000.00	
☒ 2007-185	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8520	1,000.00	
☐ 2007-186	RATESTTEMP	KALOC1	KALOC1	REQUEST	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	0.00	8510	0.00	
☐ 2007-201	DIESEL 84-87 - 2007	LMLOC2	LMLOC2	REQUEST	REPLACEMENT	MOLLYS TEST ID	2007	30,000.00	8517	600.00	

Current Filter
Status: REQUEST, Budget Year: 2007

Define Filter Reset Filter My Approvals

Actions
Back New Project

Estimated Cost
Total Cost of Listed Projects: \$ 120,000.00
New Equip Lease Total (\$/mo): \$ 2,600.00
Current Lease Total (\$/mo): \$ 2,400.00
Difference: \$ 200.00

Actions for Selected Projects
Request Approval Cancel

A message displays to indicate the project was stopped and, in the case below, justification is required prior to approval.

Projects Department: 414 - EVERETT REPAIR FACILITY

Stopped on Project 2007-185. This project requires justification. (See project detail page).

Projects: 4

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 2007-184	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8519	1,000.00	
☒ 2007-185	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8520	1,000.00	
☐ 2007-186	RATESTTEMP	KALOC1	KALOC1	REQUEST	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	0.00	8510	0.00	
☐ 2007-201	DIESEL 84-87 - 2007	LMLOC2	LMLOC2	REQUEST	REPLACEMENT	MOLLYS TEST ID	2007	30,000.00	8517	600.00	

Current Filter
Status: REQUEST, Budget Year: 2007

Define Filter Reset Filter My Approvals

Actions
Back New Project

Estimated Cost
Total Cost of Listed Projects: \$ 120,000.00
New Equip Lease Total (\$/mo): \$ 2,600.00
Current Lease Total (\$/mo): \$ 2,400.00
Difference: \$ 200.00

Actions for Selected Projects
Request Approval Cancel

- Click the **Project ID** link to go to the Project Info page.

Projects Department: 414 - EVERETT REPAIR FACILITY

Projects: 4

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 2007-184	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8519	1,000.00	
☒ 2007-185	DIESEL 88-89 - 2007	LM-MP1	LM-MP1	REQUEST	REPLACEMENT	RA EMPLOYEE	2007	45,000.00	8520	1,000.00	
☐ 2007-186	RATESTTEMP	KALOC1	KALOC1	REQUEST	REPLACEMENT	ANNIS-HILLIARD, RICHARD C.	2007	0.00	8510	0.00	
☐ 2007-201	DIESEL 84-87 - 2007	LMLOC2	LMLOC2	REQUEST	REPLACEMENT	MOLLYS TEST ID	2007	30,000.00	8517	600.00	

Current Filter
Status: REQUEST, Budget Year: 2007

Define Filter Reset Filter My Approvals

Actions
Back New Project

Estimated Cost
Total Cost of Listed Projects: \$ 120,000.00
New Equip Lease Total (\$/mo): \$ 2,600.00
Current Lease Total (\$/mo): \$ 2,400.00
Difference: \$ 200.00

Actions for Selected Projects
Request Approval Cancel

The Project Info page displays. Notice the red message indicating that justification is required before approval.

- Click **Edit** to enter a justification in the field.

The screenshot shows the 'Project Info' form. The 'Justification' field is empty, and the 'Edit' button is highlighted with a red circle and a red arrow pointing to it. The form includes fields for Project, Template, Department, Origin Loc, Destination Loc, Budget Amount, Purpose, Status, Exception, Requested By, Lease Rate, Approval Level, and Total per Equip. The 'Justification' field is located below the 'Options' section and above the 'Equipment Requested' section.

4. Enter the justification in the field and click **Save** to save your entry.

The screenshot shows the 'Project Info' form with the 'Justification' field containing the text 'Budgeted amount is approved for the project.'. The 'Save' button is highlighted with a red circle and a red arrow pointing to it. The form includes fields for Project, Template, Department, Origin Loc, Destination Loc, Budget Amount, Purpose, Status, Exception, Requested By, Lease Rate, Approval Level, and Total per Equip.

You are taken to the Add Event section of the page to add a Justification event.

5. Add information as desired and click the **Add Event** button.

The screenshot shows the 'Project Info' form with the 'Add Event' section. The 'Add Event' button is highlighted with a red circle and a red arrow pointing to it. The form includes fields for Event ID, Comments, Actual Start, and Actual Completion. The 'Add Event' button is located below the 'Add Event' section and above the 'Edit Events' section.

The event is added.

6. Click the **Save Changes** button to save the justification.

Project Info

Project	2007-185 - A	Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANINIS	Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY	Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA	Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA	Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$45,000.00

Add Event
Event added.
 Event ID:
 Comments:
 Actual Start:
 Actual Completion:
 Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/19/2007	05/21/2007	
JUSTIFICATION	06/11/2007	06/11/2007	PROJECT AMOUNT JUSTIFIED BASED ON PROJECTED EXPENSES

Save Changes

Back

A message (in red) indicates the event was saved.

Project Info

Project	2007-185 - A	Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANINIS	Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY	Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA	Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA	Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$45,000.00

Add Event
Changes saved.
 Event ID:
 Comments:
 Actual Start:
 Actual Completion:
 Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/19/2007	05/21/2007	
JUSTIFICATION	06/11/2007	06/11/2007	PROJECT AMOUNT JUSTIFIED BASED ON PROJECTED EXPENSES

Save Changes

Back

Cancel Button

The **Cancel** button changes the selected projects' status to CANCELED and requires entry of comments for each project being canceled.



Note: This action is only possible when Project Status Filter = REQUEST.

To cancel a project:

1. Select the project with the checkbox and click **Cancel**.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 1

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☒ 1000-8	1000	1000	1000	REQUEST	REPLACEMENT	MARY SMITH	2012	\$0,000.00	A-1007	600.00	

Current Filter
Status: REQUEST, Budget Year: 2012

Define Filter Reset Filter My Approvals

Estimated Cost
Total Cost of Listed Projects: \$ 50,000.00
New Equip Lease Total (\$/mo): \$ 600.00
Current Lease Total (\$/mo): \$ 0.00
Difference: \$ 600.00

Actions
Back New Project

Actions for Selected Projects
Approve Cancel

The Project Info page displays with an area to enter the reason for canceling the project.

Project Info

Project	1000-8 - CHEVY REPLACEMENT PROJECT 2012	Purpose	REPLACEMENT	Budget year	2012
Template	1000 - TEMPLATE ID FOR 1000	Status	REQUEST	Purchase year	2010
Department	1000 - MOTORPOOL DEPARTMENT	Exception			
Origin Loc	1000 - FULL SERVICE SHOP	Requested By	MARY SMITH		
Destination Loc	1000 - FULL SERVICE SHOP	Lease Rate	\$600.00	Approval Level	
Budget Amount	\$50,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$50,000.00

Cancel Reason

Reason for Canceling project (required):

Back Cancel and Finish

- Enter the reason for canceling the project and click the **Cancel and Finish** button.

Project Info

Project	1000-8 - CHEVY REPLACEMENT PROJECT 2012	Purpose	REPLACEMENT	Budget year	2012
Template	1000 - TEMPLATE ID FOR 1000	Status	REQUEST	Purchase year	2010
Department	1000 - MOTORPOOL DEPARTMENT	Exception			
Origin Loc	1000 - FULL SERVICE SHOP	Requested By	MARY SMITH		
Destination Loc	1000 - FULL SERVICE SHOP	Lease Rate	\$600.00	Approval Level	
Budget Amount	\$50,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$50,000.00

Cancel Reason

Reason for Canceling project (required):

Project cancelled due to underfunding

Back Cancel and Finish

The Projects list displays without the cancelled project.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 0

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
------------	----------	----------	----------	--------	---------	------	-------------	----------	----------------	------------	----------------

Current Filter
Status: REQUEST, Budget Year: 2012

Define Filter Reset Filter My Approvals

Estimated Cost
Total Cost of Listed Projects: \$ 0.00
New Equip Lease Total (\$/mo): \$ 0.00
Current Lease Total (\$/mo): \$ 0.00
Difference: \$ 0.00

Actions
Back New Project

Actions for Selected Projects
Approve Cancel

Approve Button

The **Approve** button allows authorized users to approve multiple projects in one step.



Note: This is only possible when the project status filter is PLANNED.



To approve multiple projects in one step, select the projects with the selection box and click the **Approve** button.

The screenshot shows the 'Projects' interface with the Department set to '1000 - MOTORPOOL DEPARTMENT'. A table lists projects, with the first project (ID 1000-6) selected. The 'Approve' button in the 'Actions for Selected Projects' section is highlighted with a red circle and an arrow. A red checkmark is visible in the selection box of the first project row.

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☒ 1000-6	1000	1000	1000	PLANNED	ADDITION	MARY SMITH	2011	50,000.00	C-1005	600.00	1

Estimated Cost Summary:

Total Cost of Listed Projects:	\$ 50,000.00
New Equip Lease Total (\$/mo):	\$ 600.00
Current Lease Total (\$/mo):	\$ 0.00
Difference:	\$ 600.00

The approval is given as indicated by the message in red at the top of the page and the Approval Level 1 indicated in the Projects list.

The screenshot shows the 'Projects' interface after approval. A red box highlights the 'Approval Given' message at the top. The 'Approval Level' for the selected project is now 2, indicated by a red circle and arrow.

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☐ 1000-6	1000	1000	1000	PLANNED	ADDITION	MARY SMITH	2011	50,000.00	C-1005	600.00	2

Reject Button

The **Reject** button allows authorized users to reject multiple projects.



Note: This is only possible when the project status filter is PLANNED.

To reject projects:

1. Select the projects with the selection box and click **Reject**.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 1

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
☒ 1000-6	1000	1000	1000	PLANNED	ADDITION	MARY SMITH	2011	\$0,000.00	C-1005	\$600.00	2

Current Filter
Status: PLANNED

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects:	\$	50,000.00
New Equip Lease Total (\$/mo):	\$	600.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	600.00

Actions

Back New Project

Actions for Selected Projects

Approve **Reject**

The Project Info Reject Reason page displays.

Project Info

Project	1000-6 - NEW FLEET	Purpose	ADDITION	Budget year	2011
Template	1000 - TEMPLATE ID FOR 1000	Status	PLANNED	Purchase year	2010
Department	1000 - MOTORPOOL DEPARTMENT	Exception	NONE		
Origin Loc	1000 - FULL SERVICE SHOP	Requested By	MARY SMITH		
Destination Loc	1000 - FULL SERVICE SHOP	Lease Rate	\$600.00	Approval Level	2
Budget Amount	\$50,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$50,000.00

Reject Reason

Reason for Rejecting project (required):

Budget Underfunding

Back Reject and Finish

2. Enter the reason for rejecting the projects in the field and click **Reject and Finish**.

Project Info

Project	1000-6 - NEW FLEET	Purpose	ADDITION	Budget year	2011
Template	1000 - TEMPLATE ID FOR 1000	Status	PLANNED	Purchase year	2010
Department	1000 - MOTORPOOL DEPARTMENT	Exception	NONE		
Origin Loc	1000 - FULL SERVICE SHOP	Requested By	MARY SMITH		
Destination Loc	1000 - FULL SERVICE SHOP	Lease Rate	\$600.00	Approval Level	2
Budget Amount	\$50,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$50,000.00

Reject Reason

Reason for Rejecting project (required):

Budget Underfunding

Back **Reject and Finish**

You are taken back to the Projects page and the list no longer includes the rejected projects.

Projects

Department: 1000 - MOTORPOOL DEPARTMENT

Projects: 0

Project ID	Template	Orig Loc	Dest Loc	Status	Purpose	User	Budget Year	Est Cost	Equip Replaced	Lease Rate	Approval Level
------------	----------	----------	----------	--------	---------	------	-------------	----------	----------------	------------	----------------

Current Filter
Status: PLANNED

Define Filter Reset Filter My Approvals

Estimated Cost

Total Cost of Listed Projects:	\$	0.00
New Equip Lease Total (\$/mo):	\$	0.00
Current Lease Total (\$/mo):	\$	0.00
Difference:	\$	0.00

Actions

Back New Project

Actions for Selected Projects

Approve Reject

Project Info Page

The Project Info page is the main page for a project that allows users to perform a variety of actions.



Workflow actions are dependent on the project's status and the user's authority. Thus, not all workflow actions are possible at all times.

Project Info							
Project	2007-184 - A		Purpose	REPLACEMENT	Budget year	2007	
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	LM-MP1 - SAN DIEGO, CA		Requested By	RA EMPLOYEE			
Destination Loc	LM-MP1 - SAN DIEGO, CA		Lease Rate	\$1,000.00	Approval Level		
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00
Options							
Subsystem	Property	Description	Cost	Requested By	Comment		
Justification						Edit	
Comments						Edit	
Equipment Requested							
Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date	
Equipment Replaced							
Back Edit Basic Info Cancel Project Justify Project Justification is required before approval.							

The Project Info page clearly indicates (at the bottom of the page) whether justification is required before the project can be approved.

The page also includes a customer-specific hyperlink, if defined in the module settings.

Project Info Section

Project Info							
Project	2007-184 - A			Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS			Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY			Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA			Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA			Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00

The Project Info section displays the main project details including, but not limited to, the following:

- Project ID
- Purpose
- Budget Year
- Template Name (including a link to the template)
- Status
- Purchase Year
- Department
- Exception
- Origination/Destination Location
- Requested By

- Lease Rate
- Approval Level
- Budget Amount – When the amount is highlighted, this means justification is required.
- Features
- Options
- Total per Equip

Options Section

Options					
Subsystem	Property	Description	Cost	Requested By	Comment
☐ CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00		
☐ CONFIGURATION	PAVMS	PAVMS STUFF	\$400.00		
☐ DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00		

[Edit](#)

This section allows you to view the various project options including the subsystem, property, description, cost, requested by and comment.

1. Click **Edit** to select the options.

Options					
Subsystem	Property	Description	Cost	Requested By	Comment
☐ CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00		
☐ CONFIGURATION	PAVMS	PAVMS STUFF	\$400.00		
☐ DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00		

[Edit](#)

You are taken to the Project Info page where you may select the desired options.

Project Info						
Project	2007-186 - TEST TEMPLATE FOR DELETION		Purpose	REPLACEMENT	Budget year	2007
Template	RATESTEMP - TEST TEMPLATE FOR DELETION		Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY		Exception			
Origin Loc	KALOC1 - ALL FUNCTIONS		Requested By	ANNIS-HILLIARD, RICHARD C.		
Destination Loc	KALOC1 - ALL FUNCTIONS		Lease Rate	\$0.00	Approval Level	
Budget Amount	\$0.00	Features	\$0.00	Options	\$300.00	Total per Equip

Options					
Subsystem	Property	Description	Cost	Requested By	Comment
☒ CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00		
☐ CONFIGURATION	PAVMS	PAVMS STUFF	\$400.00		
☐ DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00		

Features			
Subsystem	Property	Description	Cost
CONFIGURATION	EVEN OR ODD CAR	CAR NUMBERING	\$0.00
DRIVE ASSY	DRIVE AXLE	NOT OPTIONAL	\$0.00
DRIVE ASSY	DRIVE SHAFT	SUPER NOT OPTIONAL	\$0.00

[Back](#) [Save](#)

2. Select the desired options by checking the appropriate checkboxes.

 As you select the options, the Options and Total per Equip amounts increase accordingly.

3. Enter a comment if desired.
4. Click **Save** to save your selection.

You are returned to the Project Info page with the newly added option displayed.

Project Info	
Project	2007-186 - TEST TEMPLATE FOR DELETION
Template	RATESTEMP - TEST TEMPLATE FOR DELETION
Department	414 - EVERETT REPAIR FACILITY
Origin Loc	KALOC1 - ALL FUNCTIONS
Destination Loc	KALOC1 - ALL FUNCTIONS
Budget Amount	\$0.00
Features	\$0.00
Options	\$0.00
Total per Equip	\$300.00
Purpose	REPLACEMENT
Status	REQUEST
Exception	
Requested By	ANNIS-HILLIARD, RICHARD C.
Lease Rate	\$0.00
Approval Level	

Subsystem	Property	Description	Cost	Requested By	Comment
☒	CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00	MOLLYS TEST ID OVERHAUL OPTION REQUIRED
☐	CONFIGURATION	PAVMS	PAVMS STUFF	\$400.00	
☐	DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00	

Justification

Comments

Back Edit Basic Info Cancel Project Request Approval

Justification Section

The Justification section is where the user can enter text to be stored on the Project record.

Justification

Edit

The Justification section is where information displays regarding the project's justification.

1. To add justification information, click the **Edit** button.

Justification

Edit

You are taken into the Justification area.

2. Add text as needed and click **Save** to save the information.

Project Info	
Project	2007-186 - TEST TEMPLATE FOR DELETION
Template	RATESTEMP - TEST TEMPLATE FOR DELETION
Department	414 - EVERETT REPAIR FACILITY
Origin Loc	KALOC1 - ALL FUNCTIONS
Destination Loc	KALOC1 - ALL FUNCTIONS
Budget Amount	\$0.00
Features	\$0.00
Options	\$0.00
Total per Equip	\$300.00
Purpose	REPLACEMENT
Status	REQUEST
Exception	
Requested By	ANNIS-HILLIARD, RICHARD C.
Lease Rate	\$0.00
Approval Level	

Justification

Replacement required per project plan

Back Save

You are taken back to the main Project Info page where the justification text displays.

Project Info							
Project	2007-106 - TEST TEMPLATE FOR DELETION		Purpose	REPLACEMENT	Budget year	2007	
Template	RATESSTEMP - TEST TEMPLATE FOR DELETION		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	KALOC1 - ALL FUNCTIONS		Requested By	ANNIS-HILLIARD, RICHARD C.			
Destination Loc	KALOC1 - ALL FUNCTIONS		Lease Rate	\$0.00	Approval Level		
Budget Amount	\$0.00	Features	\$0.00	Options	\$300.00	Total per Equip	\$300.00

Subsystem	Property	Description	Cost	Requested By	Comment
☒ CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00	MOLLYS TEST ID	OVERHAUL OPTION REQUIRED
☐ CONFIGURATION	PAVMS	PAVMS STUFF	\$400.00		
☐ DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00		

[Edit](#)

Justification
REPLACEMENT REQUIRED PER PROJECT PLAN

Comments

[Edit](#)
[Edit](#)

[Back](#)
[Edit Basic Info](#)
[Cancel Project](#)
[Request Approval](#)

Comments Section

Comments

[Edit](#)

The Comments section is where comments regarding the project are added. The comment copies back to the comments field on the project (EQPLAN_PRJ_MAIN comment_area).

1. Click the **Edit** button to add a comment.

Comments

[Edit](#)

You are taken into the Comment area.

2. Add a comment and click **Save** to save the comment.

Project Info							
Project	2007-186 - TEST TEMPLATE FOR DELETION		Purpose	REPLACEMENT	Budget year	2007	
Template	RATESTEMP - TEST TEMPLATE FOR DELETION		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	KALOC1 - ALL FUNCTIONS		Requested By	ANNIS-HILLIARD, RICHARD C.			
Destination Loc	KALOC1 - ALL FUNCTIONS		Lease Rate	\$0.00	Approval Level		
Budget Amount	\$0.00	Features	\$0.00	Options	\$300.00	Total per Equip	\$300.00

Comments
This replacement must occur to secure funding for other projects.

Back Save

You are returned to the Project Info page where the comment now displays.

Project Info							
Project	2007-186 - TEST TEMPLATE FOR DELETION		Purpose	REPLACEMENT	Budget year	2007	
Template	RATESTEMP - TEST TEMPLATE FOR DELETION		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	KALOC1 - ALL FUNCTIONS		Requested By	ANNIS-HILLIARD, RICHARD C.			
Destination Loc	KALOC1 - ALL FUNCTIONS		Lease Rate	\$0.00	Approval Level		
Budget Amount	\$0.00	Features	\$0.00	Options	\$300.00	Total per Equip	\$300.00

Subsystem	Property	Description	Cost	Requested By	Comment
☒	CONFIGURATION	OVERHAUL	OVERHAUL PRICING	\$300.00 MOLLYS TEST ID	OVERHAUL OPTION REQUIRED
☐	CONFIGURATION	PAVMS	PAVMS STUFF		
☐	DRIVE ASSY	DIFFERENTIAL	OPTIONAL	\$2,000.00	

Justification
REPLACEMENT REQUIRED PER PROJECT PLAN.

Comments
THIS REPLACEMENT MUST OCCUR TO SECURE FUNDING FOR OTHER PROJECTS.

Back Edit Basic Info Cancel Project Request Approval

Equipment Requested/Replaced Sections

You may use the scrollbar on the right side of the page to view the Equipment Requested and Equipment Replaced sections. These sections display pertinent information about the requested/replaced equipment.

Project Info							
Project	2007-186 - TEST TEMPLATE FOR DELETION		Purpose	REPLACEMENT	Budget year	2007	
Template	RATESTEMP - TEST TEMPLATE FOR DELETION		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	KALOC1 - ALL FUNCTIONS		Requested By	ANNIS-HILLIARD, RICHARD C.			
Destination Loc	KALOC1 - ALL FUNCTIONS		Lease Rate	\$0.00	Approval Level		
Budget Amount	\$0.00	Features	\$0.00	Options	\$300.00	Total per Equip	\$300.00

Equipment Requested							
Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date	
Equipment Replaced							
Equipment	Year	Make	Model	Lifecycle Status Code	Lifecycle Status Category	Projected or Actual	Budget Amt
8510	1985	GM	T80604	A	ACTIVE		\$30,000.00

Features			
Subsystem	Property	Description	Cost
CONFIGURATION	EVEN OR ODD CAR	CAR NUMBERING	\$0.00
DRIVE ASSY	DRIVE AXLE	NOT OPTIONAL	\$0.00
DRIVE ASSY	DRIVE SHAFT	SUPER NOT OPTIONAL	\$0.00

Approval History			
Approval Event	Approval User	Approval Date	Comments

Features Section

The Features section lists all the features associated with the project.

Project Info									
Project	2007-186 - TEST TEMPLATE FOR DELETION				Purpose	REPLACEMENT	Budget year	2007	
Template	RATESTEMP - TEST TEMPLATE FOR DELETION				Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY				Exception				
Origin Loc	KALOC1 - ALL FUNCTIONS				Requested By	ANNIS-HILLIARD, RICHARD C.			
Destination Loc	KALOC1 - ALL FUNCTIONS				Lease Rate	\$0.00	Approval Level		
Budget Amount	\$0.00		Features	\$0.00		Options	\$300.00	Total per Equip	\$300.00

Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date	
Equipment Replaced							
Equipment	Year	Make	Model	Lifecycle Status Code	Lifecycle Status Category	Projected or Actual	Budget Amt
8510	1985	GM	T80604	A	ACTIVE		\$30,000.00

Features			
Subsystem	Property	Description	Cost
CONFIGURATION	EVEN OR ODD CAR	CAR NUMBERING	\$0.00
DRIVE ASSY	DRIVE AXLE	NOT OPTIONAL	\$0.00
DRIVE ASSY	DRIVE SHAFT	SUPER NOT OPTIONAL	\$0.00

Approval History			
Approval Event	Approval User	Approval Date	Comments
APPROVAL REQUEST	MOLLYS TEST ID	06/19/2007 13:09	PROJECT IS READY FOR APPROVAL

Events			
Event	Actual Start	Actual Completion	Comments

Back Edit Basic Info Cancel Project Request Approval Edit

Approval History Section

The Approval History section displays all approval history associated with the project.

Approval History			
Approval Event	Approval User	Approval Date	Comments
APPROVAL REQUEST	MOLLYS TEST ID	06/19/2007 13:09	PROJECT IS READY FOR APPROVAL

Events Section

The Events section is where you may add events to the project.

1. Click **Edit** to add events.

Events			
Event	Actual Start	Actual Completion	Comments

Edit

You are taken to the Add Event page.

Project Info							
Project	2007-184 - A		Purpose	REPLACEMENT	Budget year	2007	
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANINIS		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	LM-MP1 - SAN DIEGO, CA		Requested By	RA EMPLOYEE			
Destination Loc	LM-MP1 - SAN DIEGO, CA		Lease Rate	\$1,000.00	Approval Level		
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00

Add Event	
Event ID	
Comments	
Actual Start	
Actual Completion	
Add Event	

Edit Events			
Event	Actual Start	Actual Completion	Comments

Save Changes

Back

2. Complete the fields and click **Add Event** to add desired events.

Project Info							
Project	2007-184 - A		Purpose	REPLACEMENT	Budget year	2007	
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	LM-MP1 - SAN DIEGO, CA		Requested By	RA EMPLOYEE			
Destination Loc	LM-MP1 - SAN DIEGO, CA		Lease Rate	\$1,000.00	Approval Level		
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00

Add Event

Event ID:

Comments:

Actual Start:

Actual Completion:

Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/19/2007	05/21/2007	

Save Changes

Back

A message indicates the event was added.

Project Info							
Project	2007-185 - A		Purpose	REPLACEMENT	Budget year	2007	
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	LM-MP1 - SAN DIEGO, CA		Requested By	RA EMPLOYEE			
Destination Loc	LM-MP1 - SAN DIEGO, CA		Lease Rate	\$1,000.00	Approval Level		
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00

Add Event

Event added

Event ID:

Comments:

Actual Start:

Actual Completion:

Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/19/2007	05/21/2007	

Save Changes

Back

- To add comments, enter the desired comment and click **Save Changes**.

Project Info							
Project	2007-184 - A		Purpose	REPLACEMENT	Budget year	2007	
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007	
Department	414 - EVERETT REPAIR FACILITY		Exception				
Origin Loc	LM-MP1 - SAN DIEGO, CA		Requested By	RA EMPLOYEE			
Destination Loc	LM-MP1 - SAN DIEGO, CA		Lease Rate	\$1,000.00	Approval Level		
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00	Total per Equip	\$45,000.00

Add Event

Event ID:

Comments:

Actual Start:

Actual Completion:

Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/25/2007	05/31/2007	Check for better lease option availability

Save Changes

Back

A message indicates the change was saved.

Project Info

Project	2007-184 - A	Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS	Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY	Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA	Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA	Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$45,000.00

Add Event
Changes saved.

Event ID:

Comments:

Actual Start:

Actual Completion:

Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/25/2007	05/31/2007	CHECK FOR BETTER LEASE OPTION AVAILABILITY.

Save Changes

Back

- Click **Back** to return to the main Project Info page.

Project Info

Project	2007-184 - A	Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS	Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY	Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA	Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA	Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$45,000.00

Add Event
Changes saved.

Event ID:

Comments:

Actual Start:

Actual Completion:

Add Event

Edit Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/25/2007	05/31/2007	CHECK FOR BETTER LEASE OPTION AVAILABILITY.

Save Changes

Back

You are returned to the main Project Info page with the event and comments displayed.

Project Info

Project	2007-184 - A	Purpose	REPLACEMENT	Budget year	2007
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS	Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY	Exception			
Origin Loc	LM-MP1 - SAN DIEGO, CA	Requested By	RA EMPLOYEE		
Destination Loc	LM-MP1 - SAN DIEGO, CA	Lease Rate	\$1,000.00	Approval Level	
Budget Amount	\$45,000.00	Features	\$0.00	Options	\$0.00
				Total per Equip	\$45,000.00

Equipment Requested

Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date	
Equipment Replaced							
Equipment	Year	Make	Model	Lifecycle Status Code	Lifecycle Status Category	Projected or Actual	Budget Amt
8519	1985	GM	T80604	A	ACTIVE		\$30,000.00

Features

Subsystem	Property	Description	Cost
Approval History			
Approval Event	Approval User	Approval Date	Comments

Events

Event	Actual Start	Actual Completion	Comments
MISC EVENT	05/25/2007	05/31/2007	CHECK FOR BETTER LEASE OPTION AVAILABILITY.

Edit

Back Edit Basic Info Cancel Project Justify Project Justification is required before approval.

Back Button

The screenshot shows the 'Project Info' form. At the bottom, there are four buttons: 'Back', 'Edit Basic Info', 'Cancel Project', and 'Request Approval'. The 'Back' button is circled in red, and a red arrow points to it from the 'Equipment Replaced' table above.

Project Info	
Project	2007-184 - A
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS
Department	414 - EVERETT REPAIR FACILITY
Origin Loc	LM-MP1 - SAN DIEGO, CA
Destination Loc	LM-MP1 - SAN DIEGO, CA
Budget Amount	\$45,000.00
Features	\$0.00
Options	\$0.00
Total per Equip	\$45,000.00

Subsystem	Property	Description	Cost	Requested By	Comment
Justification EQUIPMENT REQUIRED PER ANNUAL PROJECT PLAN. Edit Comments THIS REPLACEMENT MUST BE COMPLETED TO SECURE FUNDING FOR OTHER PROJECTS. Edit					

Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date
Equipment Replaced						

The **Back** button takes you back to the Main Project Summary page.

Edit Basic Info Button

The screenshot shows the 'Project Info' form. At the bottom, there are four buttons: 'Back', 'Edit Basic Info', 'Cancel Project', and 'Request Approval'. The 'Edit Basic Info' button is circled in red, and a red arrow points to it from the 'Equipment Replaced' table above.

Project Info	
Project	2007-184 - A
Template	DIESEL 88-89 - 2007 - TEST TEMPLATE FOR RANNIS
Department	414 - EVERETT REPAIR FACILITY
Origin Loc	LM-MP1 - SAN DIEGO, CA
Destination Loc	LM-MP1 - SAN DIEGO, CA
Budget Amount	\$45,000.00
Features	\$0.00
Options	\$0.00
Total per Equip	\$45,000.00

Subsystem	Property	Description	Cost	Requested By	Comment
Justification EQUIPMENT REQUIRED PER ANNUAL PROJECT PLAN. Edit Comments THIS REPLACEMENT MUST BE COMPLETED TO SECURE FUNDING FOR OTHER PROJECTS. Edit					

Equipment	Year	Make	Model	Planned Date	Actual Date	Shipped Date
Equipment Replaced						

The **Edit Basic Info** button takes you to the Project Basic Info page where the user may update various Project details.

The screenshot shows the 'Project Basic Info' form with various fields for project details.

Project Basic Info	
Project ID	2007-184
Purpose	REPLACEMENT
Budget year	2007
Purchase year	2007
Exception	
Status	REQUEST
Description	A
Project template ID	DIESEL 88-89 - 2007 TEST TEMPLATE FOR RANNIS
Department ID	414 EVERETT REPAIR FACILITY
Requesting user ID	RAEMP RA EMPLOYEE
Originating location ID	LM-MP1 SAN DIEGO, CA
Destination location ID	LM-MP1 SAN DIEGO, CA
Back	Save

Cancel Project Button

The screenshot shows the 'Project Info' form for project 2007-184 - A. The status is 'REQUEST'. The 'Cancel Project' button is highlighted with a red circle and an arrow. The form includes fields for Project, Template, Department, Origin Loc, Destination Loc, Budget Amount (\$45,000.00), Features (\$0.00), Options (\$0.00), and Total per Equip (\$45,000.00). There are also sections for Justification, Comments, and Equipment Requested/Replaced.

If the project's status is REQUEST, the project may be canceled by any user.

Justify Project Button

The screenshot shows the 'Project Info' form for project 2007-188 - PROJECT TO JUSTIFY. The status is 'REQUEST'. The 'Justify Project' button is highlighted with a red circle and an arrow. The form includes fields for Project, Template, Department, Origin Loc, Destination Loc, Budget Amount (\$30,000.00), Features (\$0.00), Options (\$0.00), and Total per Equip (\$30,000.00). There are also sections for Justification, Comments, and Equipment Requested/Replaced.

If the project's status is REQUEST, and justification is required before approval can be requested, the user is able to easily justify the project by following the steps below.

1. Click the **Justify Project** button.

The Add Event page displays with justification as the default event ID.

The screenshot shows the 'Add Event' page. The 'Event ID' field is set to 'JUSTIFICATION' and is highlighted with a red circle and an arrow. The form includes fields for Comments, Actual Start, and Actual Completion (06/21/2007). There are buttons for 'Add Event' and 'Save Changes'.

2. Enter comments as desired and click **Add Event**.

Project Info						
Project	2007-188 - PROJECT TO JUSTIFY		Purpose	ADDITION	Budget year	2007
Template	DIESEL 84-87 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY		Exception			
Origin Loc	LMLOC2 - SAN DIEGO, CA		Requested By	MOLLYS TEST ID		
Destination Loc	LMLOC2 - SAN DIEGO, CA		Lease Rate	\$600.00	Approval Level	
Budget Amount	\$30,000.00	Features	\$0.00	Options	\$0.00	Total per Equip \$30,000.00

Add Event			
Event ID	JUSTIFICATION		
Comments	Project reviewed and justification granted		
Actual Start			
Actual Completion	06/21/2007		
Add Event			

Edit Events			
Event	Actual Start	Actual Completion	Comments
JUSTIFICATION		06/21/2007	PROJECT REVIEWED AND JUSTIFICATION GRANTED

Buttons: Back, Save Changes

A message displays to indicate the event was added and the Justification event is listed in the Edit Events list.

Project Info						
Project	2007-188 - PROJECT TO JUSTIFY		Purpose	ADDITION	Budget year	2007
Template	DIESEL 84-87 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY		Exception			
Origin Loc	LMLOC2 - SAN DIEGO, CA		Requested By	MOLLYS TEST ID		
Destination Loc	LMLOC2 - SAN DIEGO, CA		Lease Rate	\$600.00	Approval Level	
Budget Amount	\$30,000.00	Features	\$0.00	Options	\$0.00	Total per Equip \$30,000.00

Add Event			
Event ID			
Comments			
Actual Start			
Actual Completion			
Event added			

Edit Events			
Event	Actual Start	Actual Completion	Comments
JUSTIFICATION		06/21/2007	PROJECT REVIEWED AND JUSTIFICATION GRANTED

Buttons: Back, Save Changes

3. Click **Back** to go back to the main Project Info page.

The main Project Info page displays with the Justification event listed and a new Request Approval button that allows the user to request approval for the justified project.

Project Info						
Project	2007-188 - PROJECT TO JUSTIFY		Purpose	ADDITION	Budget year	2007
Template	DIESEL 84-87 - 2007 - TEST TEMPLATE FOR RANNIS		Status	REQUEST	Purchase year	2007
Department	414 - EVERETT REPAIR FACILITY		Exception			
Origin Loc	LMLOC2 - SAN DIEGO, CA		Requested By	MOLLYS TEST ID		
Destination Loc	LMLOC2 - SAN DIEGO, CA		Lease Rate	\$600.00	Approval Level	
Budget Amount	\$30,000.00	Features	\$0.00	Options	\$0.00	Total per Equip \$30,000.00

Equipment Replaced							
Equipment	Year	Make	Model	Lifecycle Status Code	Lifecycle Status Category	Projected or Actual	Budget Amt.
0147	1995	TMC	T80206	A	ACTIVE		\$50,000.00

Features			
Subsystem	Property	Description	Cost
CONFIGURATION	EVEN OR ODD CAR	CAR NUMBERING	\$0.00
DRIVE ASSY	DRIVE AXLE	NOT OPTIONAL	\$0.00
DRIVE ASSY	DRIVE SHAFT	SUPER NOT OPTIONAL	\$0.00

Approval History			
Approval Event	Approval User	Approval Date	Comments

Events			
Event	Actual Start	Actual Completion	Comments
JUSTIFICATION		06/21/2007	PROJECT REVIEWED AND JUSTIFICATION GRANTED

Buttons: Back, Edit Basic Info, Cancel Project, **Request Approval**, Edit