SECTION 3: CAPITAL INVENTORY EDITING AND UPDATING INSTRUCTIONS FOR GRANTEES

The steps in this section assume you are already logged into the Portal. To log into the Portal please refer to the Getting Started section of the Introduction.

Creating a Vehicle/Rolling Stock Inventory Item
1. Click on the Capital Inventory tab at the top of the page
2. Click on the Vehicle/Rolling Stock Inventory heading tab, if collapsed, then click "Add New"

This action will open up the vehicle information form, the top of which is shown on the next page.

3.   Complete and save all sections of the form, the following fields are required:
- Vehicle Type
- Vehicle Identification Number (VIN)
- Placed Into Service
- Year Purchased
- Vehicle Condition
- Vehicle Usage
- Wheelchair Lift

4.   Click on the "Save" button. This new record will now appear under the Vehicle/Rolling Stock Inventory heading tab (refer to Step 1). The system will automatically assign the inventory item a name, starting with the letters INV-0000xxxx.

5. Once a vehicle has been saved in the inventory, you can edit its information by clicking "Edit" next to the record where it appears in the Vehicle/Rolling Stock Inventory heading tab (shown below). This will enable you to update the information for this vehicle (mileage, repairs, maintenance costs, etc.) on the required annual basis.

Creating a Vehicle/Rolling Stock Inventory Item (continued)

6. If you have several vehicles in your fleet that are of the same make/model, you can save yourself a little bit of work by cloning an existing vehicle record, and then entering the information that is different from the original record (information such as model year, VIN, current mileage, etc.). To do this, click "Clone" next to the vehicle record that you want to copy.

A new vehicle record form will open up and is now available for editing. Don't forget to hit "Save" when you have finished entering the information for this new record.

Accident Reporting

Accidents that result in more than $5000 in damages to a vehicle must be reported. When they occur, accident reports are tied to vehicles that have been entered into the capital inventory. There are a two ways to enter accident information.

Method 1:

1. Click on the Capital Inventory tab at the top of the page
2. Under the Vehicle/Rolling Stock Inventory heading, find the vehicle that has been involved in an accident. Click "Report Accident" and the Accident Information form will open up.
3. Complete the form, entering information about damages, injuries, etc. NOTE: An Estimated Damage value of $5000 or above is required.
4. Click "Report Accident" to save the accident record.

Method 2: Method 2 can be used if you are already in a vehicle record that you have opened for editing.

1. From within the existing vehicle record, click on "Report Accident" at the top center of the screen.

Accident Reporting (continued)

5. The Accident Information form will open up. Follow steps 3 and 4 from Method 1 above. Don't forget to click "Report Accident" to save the accident record.

Creating a Facility inventory record

1. Click on the Capital Inventory tab at the top of the page
2. Click on the Facilities heading tab, if collapsed, then click "Add New"

3. Complete and save the form, the following fields are required:
   - Name of Facility
   - City
   - Physical Address
   - County
4. Click on the "Save" button. This new record will now appear under the Facilities heading tab.
5. If you need to edit any information for an existing facility record, click "Edit" next to the facility and change the information accordingly. Don't forget to click "Save" when you're done.

Creating a Park and Ride inventory record

1. Click on the Capital Inventory tab at the top of the page
2. Click on the Park and Ride heading tab, if collapsed, then click "Add New"

3. Complete and save the form, the following fields are required:
   - PnR Name
   - Street/Intersection
   - County
   - General Auto Parking
   - Handicapped Auto Parking
   - Reserved Auto Parking
4. Click on the "Save" button. This new record will now appear under the Park and Ride heading tab.
5. If you need to edit any information for an existing facility record, click "Edit" next to the facility and change the information accordingly. Don't forget to click "Save" when you're done.