

Rail Carrier Partner 2.0.15 Tool: Data Entry Guide 2015 Data Year - United States Version





Rail Carrier Partner 2.0.15 Tool: Data Entry Guide 2015 Data Year - United States Version

Transportation and Climate Division
Office of Transportation and Air Quality
U.S. Environmental Protection Agency



Office of Transportation and Air Quality
EPA-420-B-16-039
February 2016

Part 3: DATA ENTRY GUIDE

This guide is Part 3 of a three-part series designed to help your company participate fully in the SmartWay Transport Partnership.

In Part 3, you will learn how to enter the company and fleet data you collected using Part 2 into the SmartWay Rail Tool. This guide covers:

1. Downloading and setting up the Tool to run properly
2. Basic organization of the SmartWay Rail Tool
3. Entering your data
4. Data validation
5. Viewing fleet performance summary data
6. Submitting data to SmartWay
7. Troubleshooting the Tool



WARNING!

Completing this Tool requires a considerable amount of information about your company and the fleets that are joining SmartWay. There are many sections and screens to complete for each fleet that you operate. While you will have the ability to save your Tool along the way and return to it at any time, we **STRONGLY ENCOURAGE** you to review Part 1 to understand key information about joining the Partnership and use Part 2 of this series to learn about the data requirements and gather your data **BEFORE** attempting to use Part 3 to complete the Tool.

Downloading and Setting up the Tool

Software and Hardware Requirements

The Rail Tool was designed in Microsoft Excel. Microsoft Excel is an electronic spreadsheet program used for storing and manipulating data. Microsoft Excel Forms were used to enable the functional capabilities of the Tool.

Completing the Rail Tool requires the following software and hardware:

- A 2003 or later version of Microsoft Excel
- Excel security level set at Medium or lower
- A PC running Windows XP or newer operating system, or a Mac that is running the Windows XP operating system The tool does not currently work using the Mac operating system
- At least 10 megabytes of available disk space (more disk space may be required based on the number of companies you define in your Tool).
- Adequate memory (RAM) to run Microsoft Office
- A monitor resolution of at least 1,024 x 768

NOTE: The Excel web application in MS Office 365 (the cloud-based version of the Office operating system) does not currently support the macros used in the SmartWay tools. Therefore SmartWay tools do no function properly in Office 365 at this time.

Check with the user guides for your computer, online support, or your company's IT department to make sure your system is set up to use the Rail Tool.

We encourage you to make sure that you virus software is up to date, and scan your PC before putting data in the Rail Tool.

Downloading the SmartWay Rail Tool

To download the Rail Tool, visit: <http://www.epa.gov/smartway/forpartners/index.htm>

Save the Tool in a folder on your hard drive; this folder will house copies of your data and future updates.

How to Set Security Levels for the SmartWay Tools

The following instructions should appear on your screen *if* you need to change your security settings before running the Tool. The instructions differ depending upon what version of Excel you use (Excel 2003, 2007, 2010 or 2013).

Security Settings For Excel 2003 Users

To use the Rail Tool in Microsoft Excel 2003, you will need to have your security levels set to “Medium.”

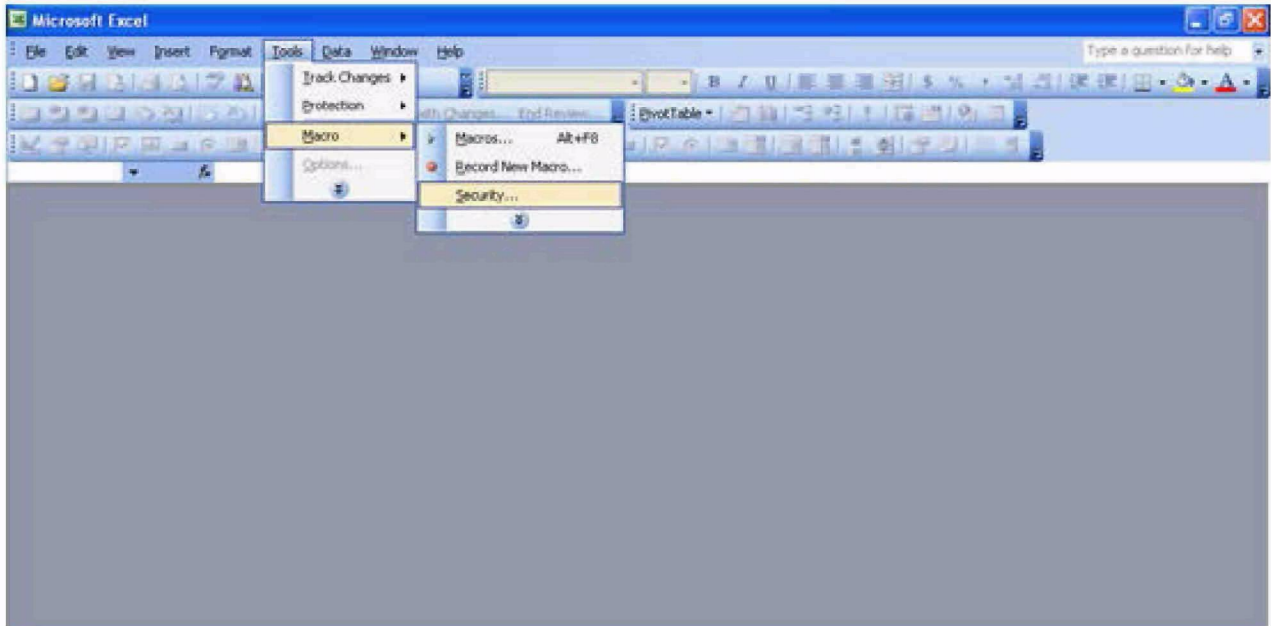


Figure 1: Macro Setting Tabs in Excel 2003

Setting Security Levels to Medium in Excel 2003

1. When using Excel 2003, on the menu bar, go to *Tools* → *Macro* → *Security Level*.
2. When the “Security” window opens, select the “Medium” level, and select **OK**.



Figure 2: Security Level Setting Screen in Excel 2003

Running the Tool in Microsoft Excel 2003

1. Save the Tool to your computer in a folder on your hard drive.
2. Go to that folder and double-click on the file to open the Tool.
3. You will see a security-warning box appear (**Figure 3**). Select the

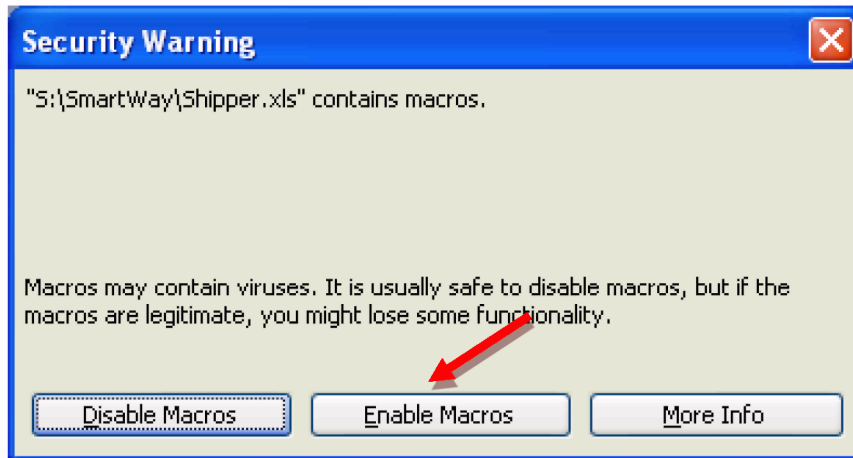
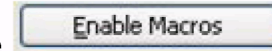


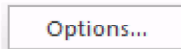
Figure 3: Screen showing “Enable Macros” button

The **Welcome** Screen for the Rail Tool should then appear and you will be ready to begin working on your tool.

Security Settings For Excel 2007 Users

The default settings for Excel 2007 should enable you to run the Tool without any changes.

Running the Tool in Microsoft Excel 2007

- 1) Save the Tool to your computer.
- 2) Open the file, and select the  button that appears after the Security Warning just below the menu bar (**Figure 4**). Detailed instructions are also provided on the screen itself.

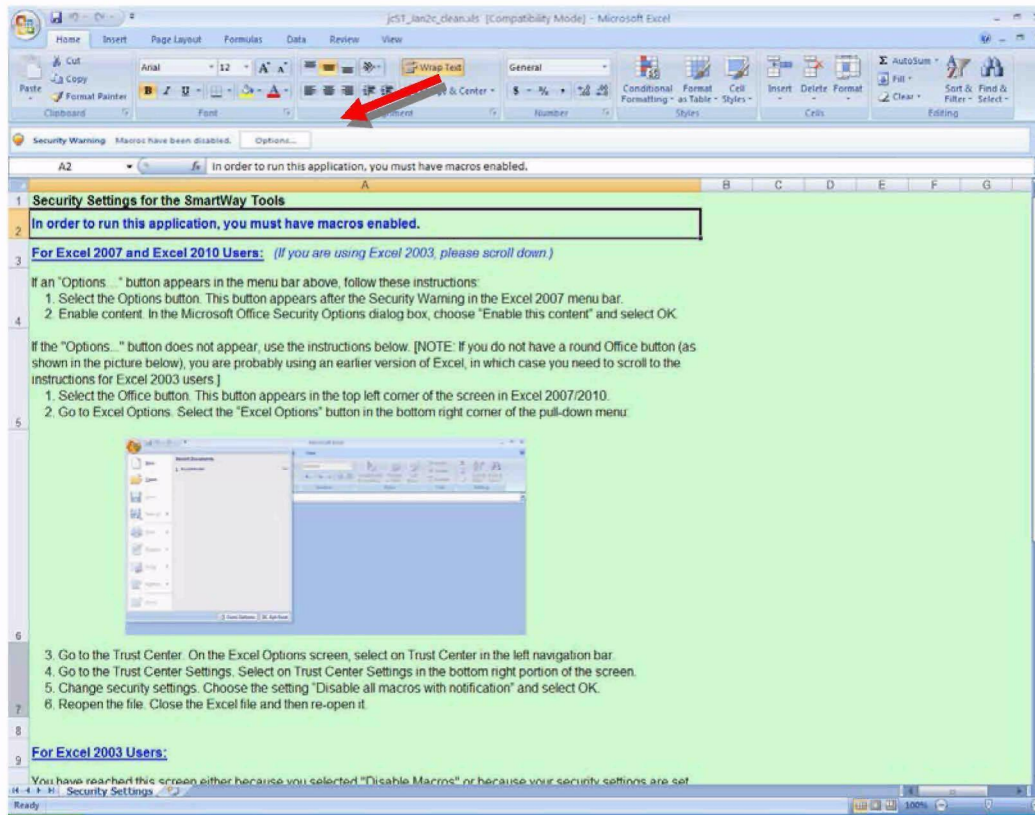


Figure 4: Security Warning Screen

- 3) In the **Microsoft Office Security Options** dialog box (Figure 5), choose “Enable this content” and select **OK**.



Figure 5: Security Options Dialogue Box

The **Welcome** Screen for Rail Tool should then appear and you will be ready to begin working on your Tool.

Troubleshooting the Security Settings in Microsoft Excel 2007

If you reach this point and the Tool does NOT open, you may have your security set too high.

To adjust your security settings, select the  button (in the top left corner of the screen) and then select the  button in the bottom right corner of the pull-down menu (**Figure 6A**).

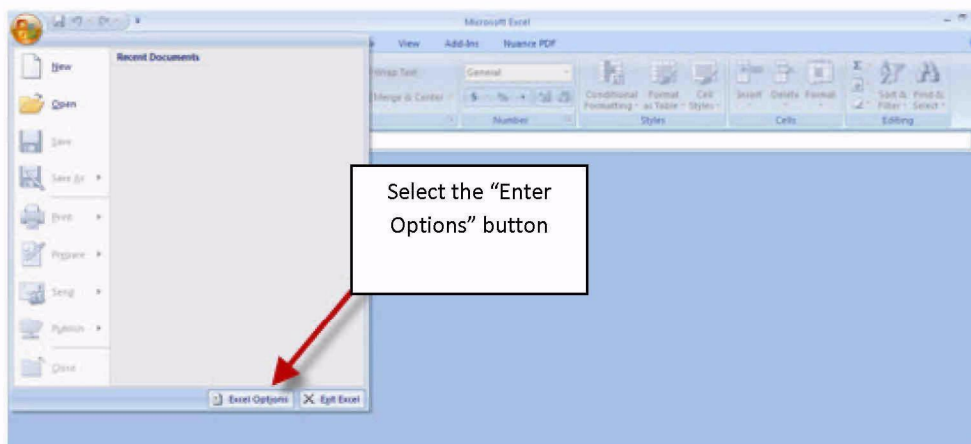


Figure 6A: Excel Options Drop-Down Menu

On the **Excel Options** screen, select **Trust Center** in the left navigation bar (**Figure 6B**):

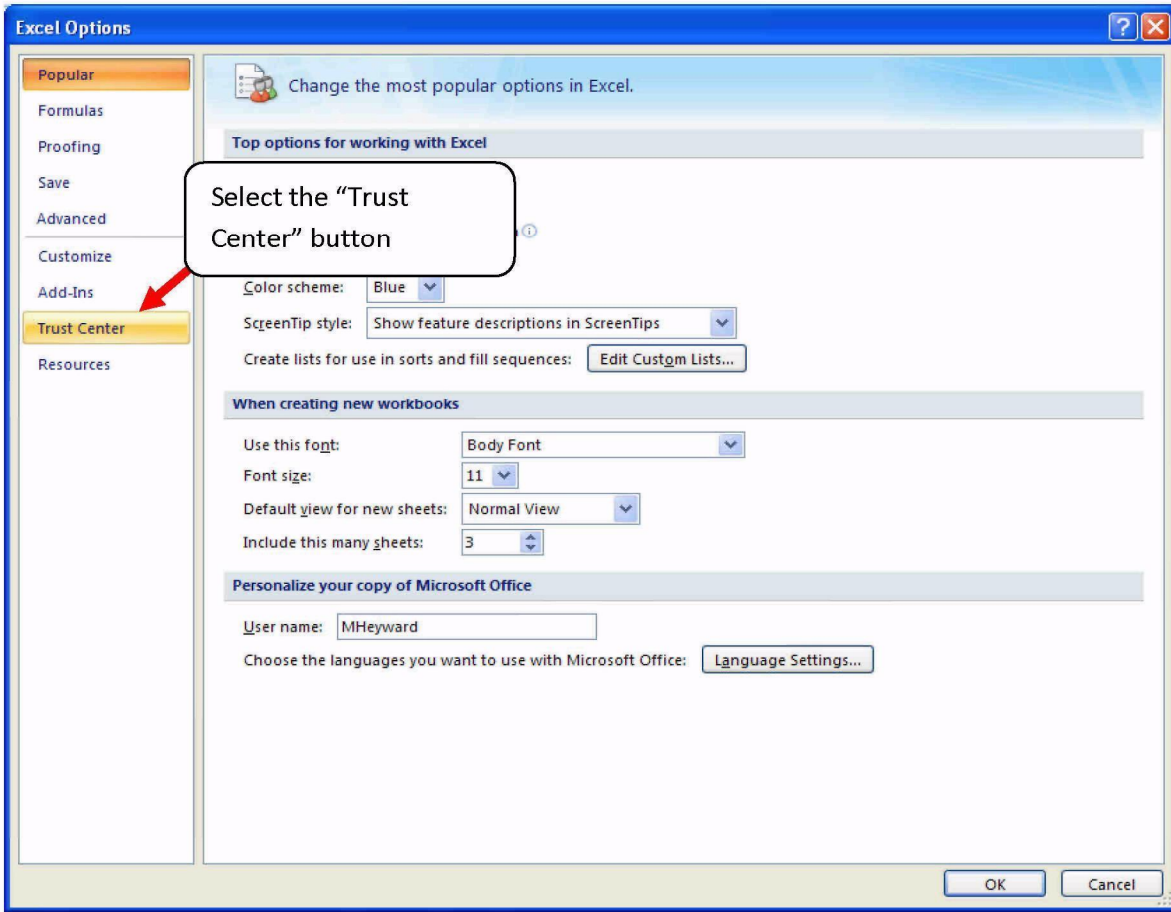


Figure 6B: Excel Options Drop-Down Menu

When the Trust Center options display opens, select **Trust Center Settings** in the bottom right portion of the screen (**Figure 7**):

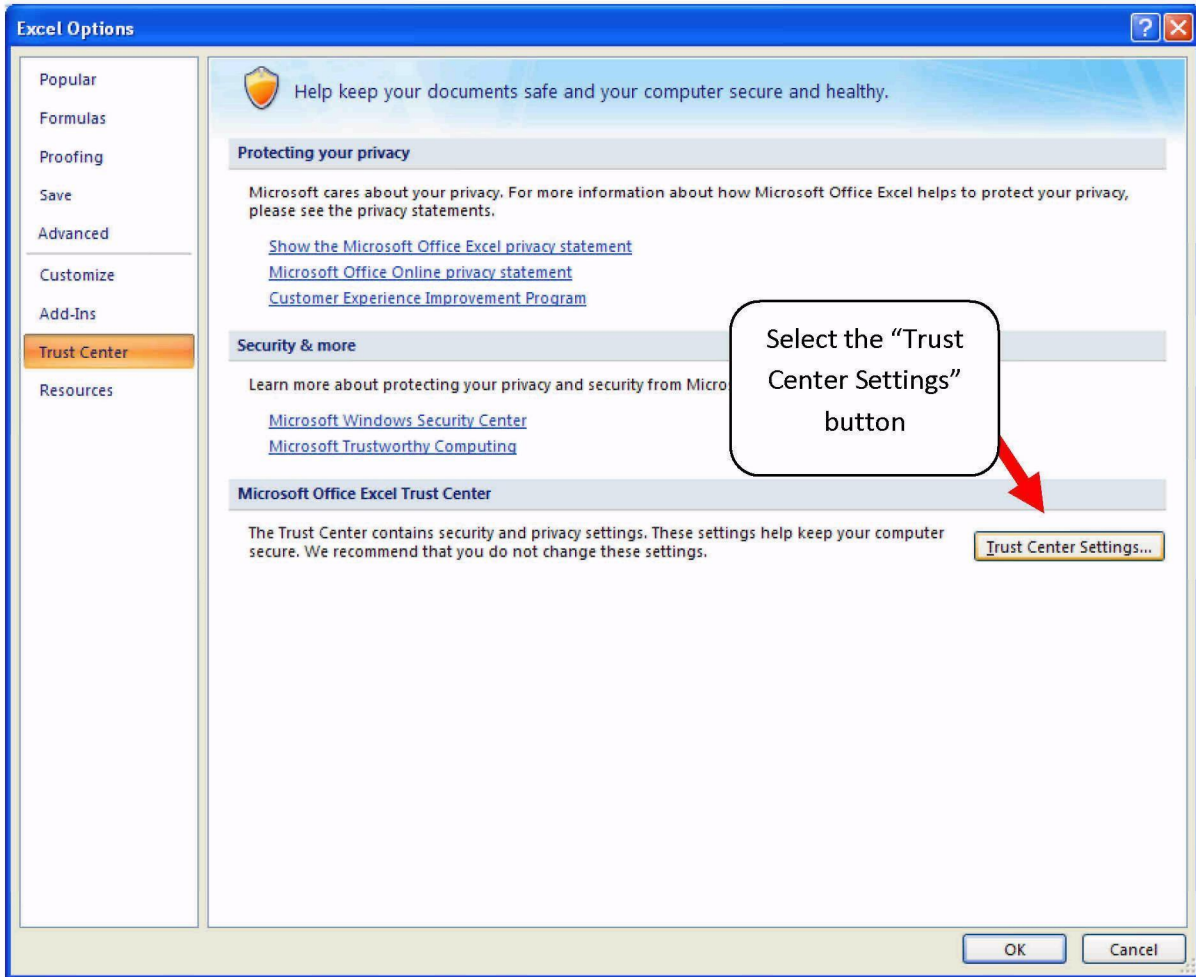


Figure 7: Trust Center Settings Screen

Choose the setting “Disable all macros with notification” (Figure 8) and select **OK**.

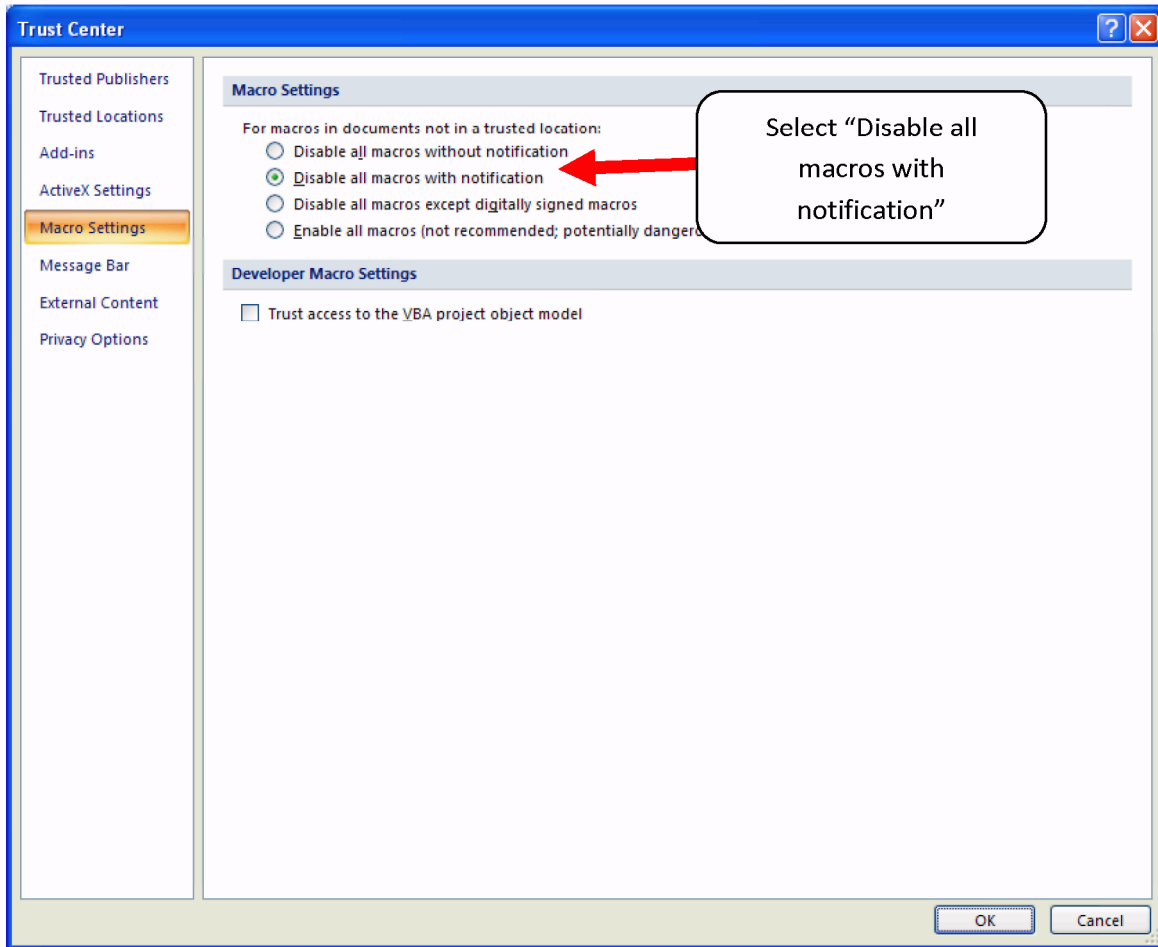


Figure 8: Macro Settings Screen

Then run the Tool.

If, at this point, the Tool does not open, review the “Software and Hardware Requirements” on page 7.

If you after reviewing this section, you cannot determine how to correct the problem, contact your SmartWay Partner Account Manager.

Security Settings For Excel 2010 and 2013 Users

The default settings for Excel 2010 and 2013 should enable you to run the tool without any changes. To run the tool:

- 1) Save the Tool to your computer.
- 2) Open the file. Depending on your Office settings, you may receive an “Enable Editing” popup. If you do, simply select the  button. This will allow you to enter data into the Tool. You may only receive this popup the very first time you open the Tool.

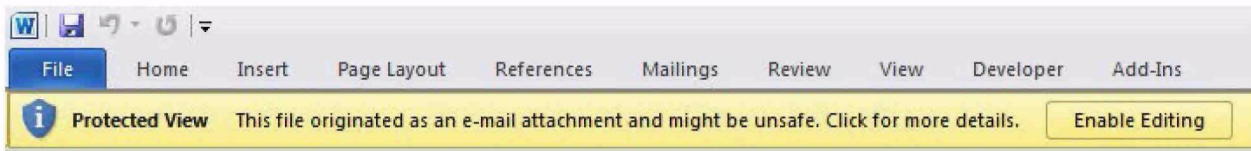


Figure 9: The Enable Editing Button

- 3) Depending on your Excel macro security settings, you may receive a  popup. If you do, simply select the  button. This will enable macros in the tool you just opened.

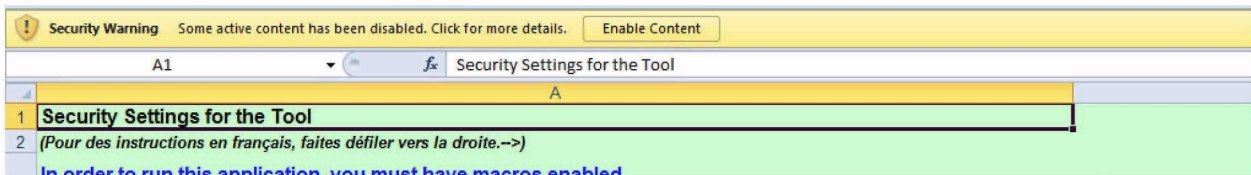

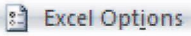


Figure 10: Security Warning Popup

If, at this point, the Tool does not open, review the “Software and Hardware Requirements” on page 7.

Otherwise, you may have your security set too high. To adjust your security settings, select the  button (in the top left corner of the screen) and then select the  button in the bottom right corner of the pull-down menu (**Figure 11**):

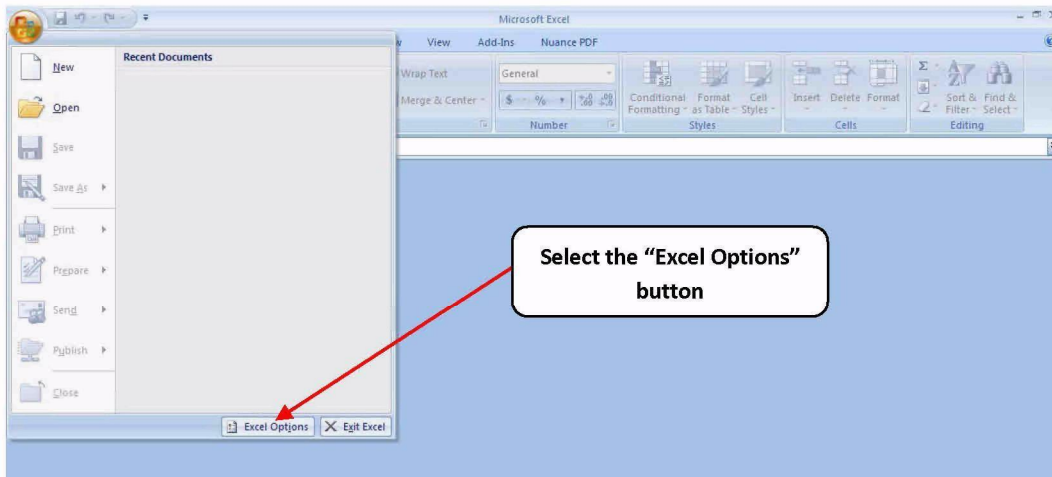


Figure 11: Excel 2010/2013 Options Drop-Down Menu

On the Excel Options screen, select **Trust Center** in the left navigation bar (**Figure 12**):

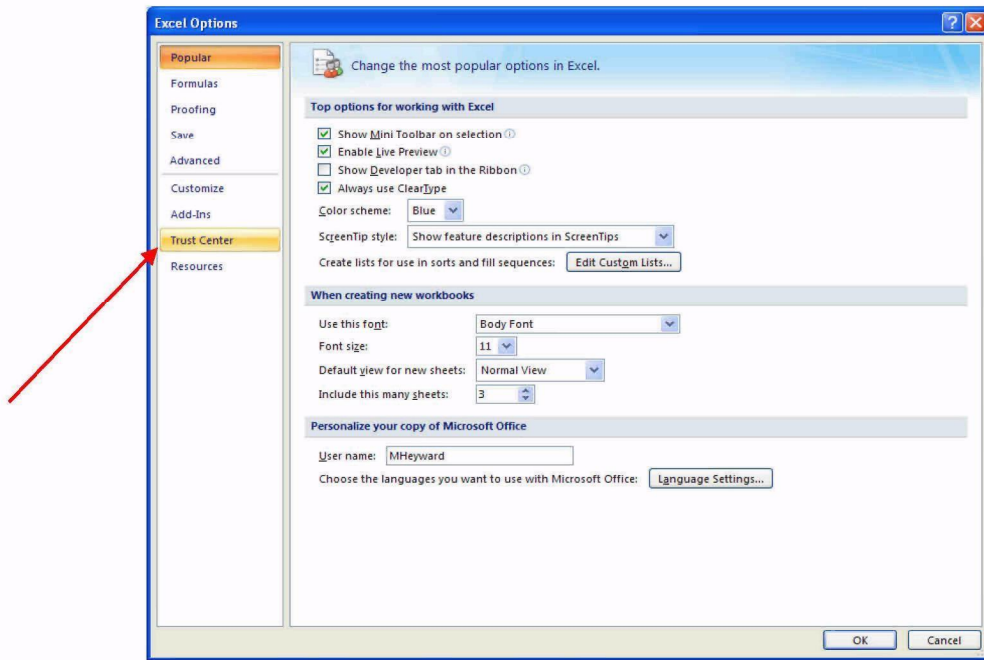


Figure 12: Excel 2010/2013 Options Drop-Down Menu

When the Trust Center options display opens, select **Trust Center Settings** in the bottom right portion of the screen (**Figure13**):

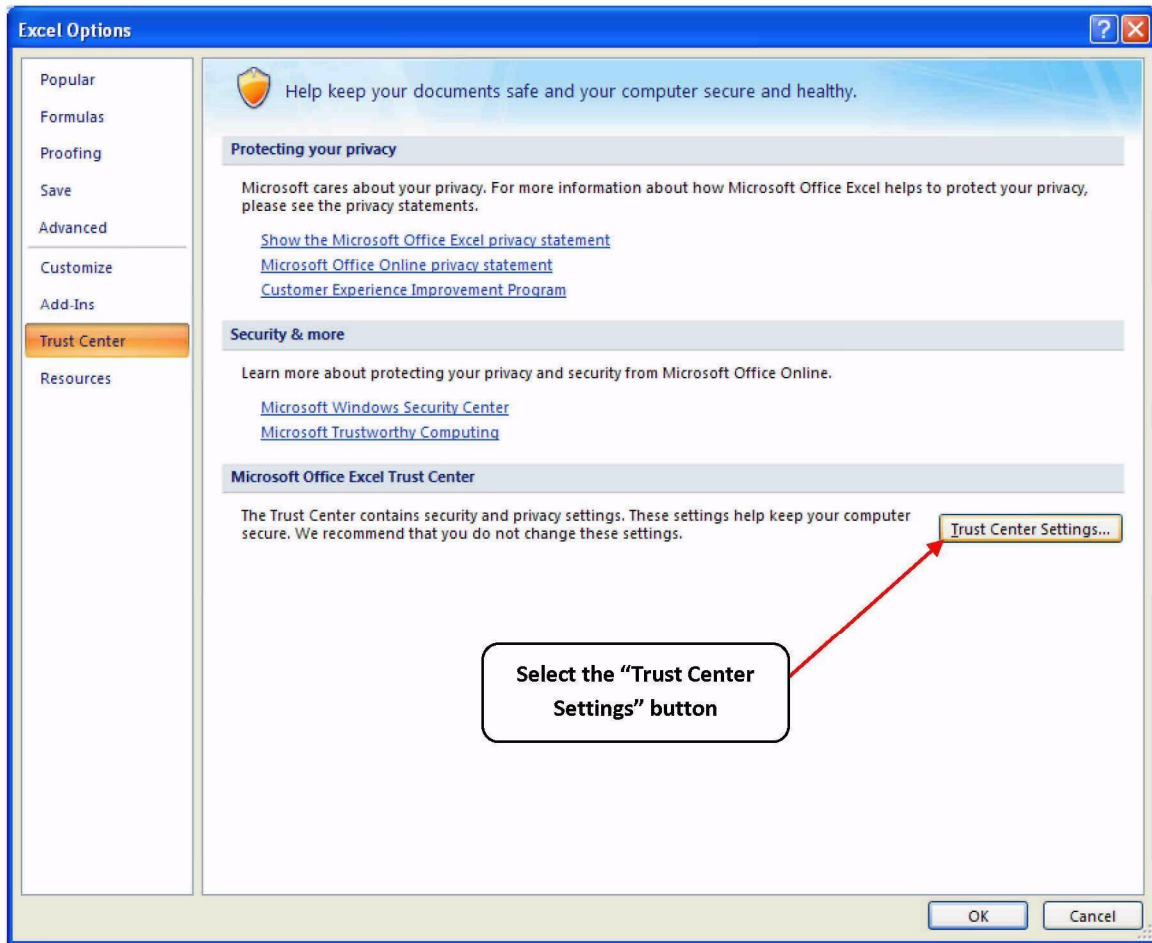


Figure 13: Trust Center Settings Screen

Choose the setting “Disable all macros with notification” (Figure 14) and select **OK**.

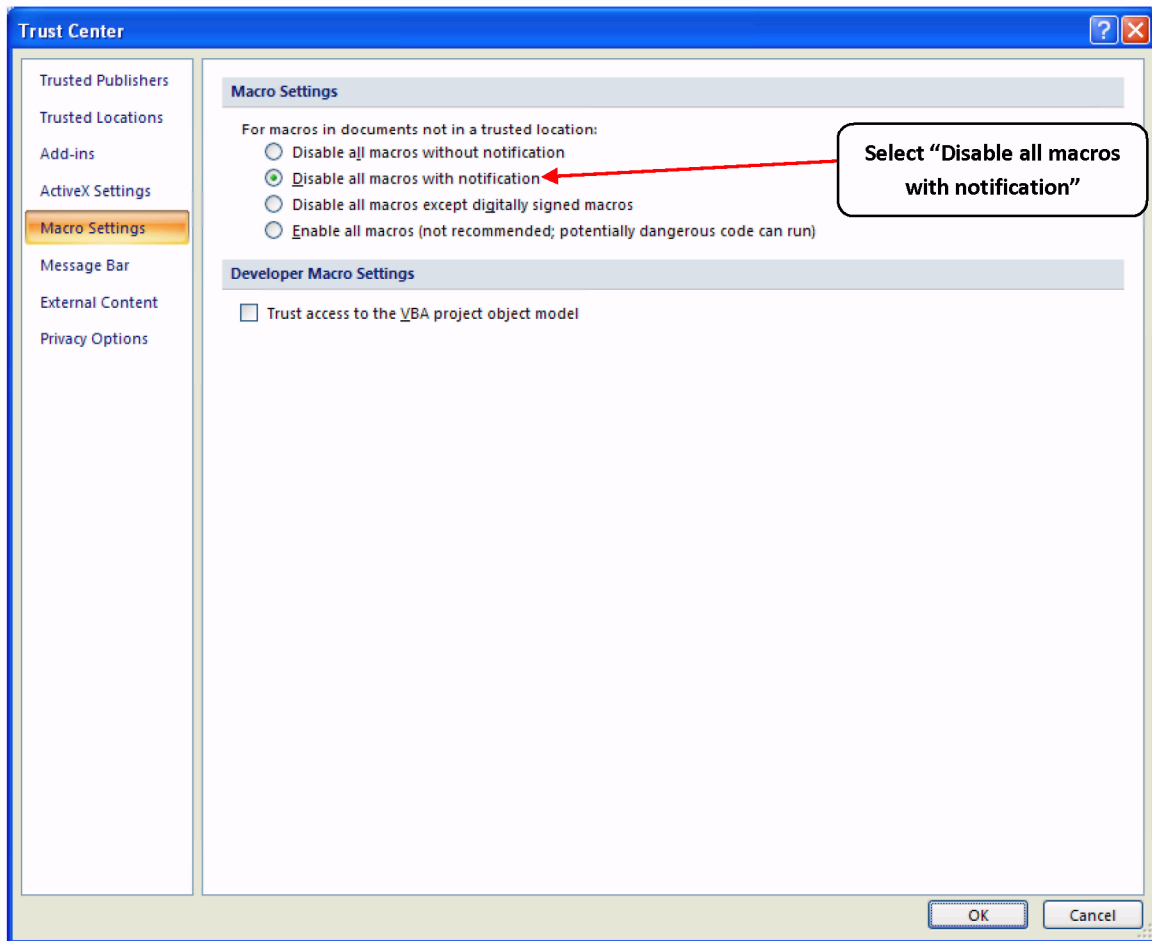


Figure 14. Macro Settings Screen

Basic Organization of the SmartWay Rail Tool

Understanding the Tool Format and Structure

The SmartWay Rail Tool is organized around (1) information screens, (2) forms or worksheets, and (3) reports/summaries that guide you through the process of joining the SmartWay Transport Partnership and/or providing your annual update to maintain your good standing with the program.

Each screen or form opens up within a Microsoft Excel spreadsheet. The screens generally look like the one shown here:

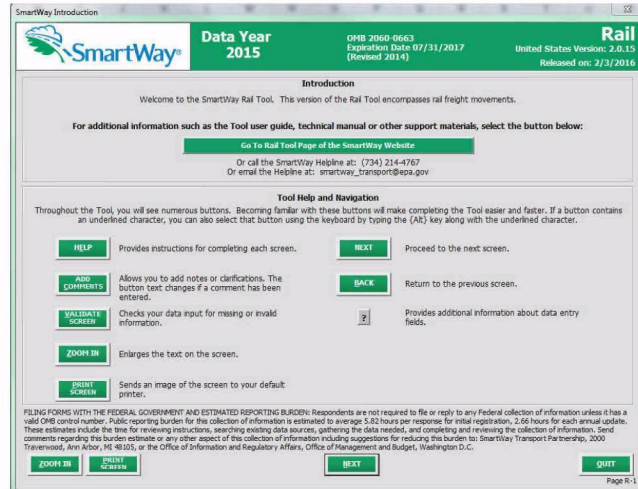


Figure 15 Opening Screen of Rail Tool

The name of each form appears at the top left-hand corner of the screen, in white text on the blue window bar.

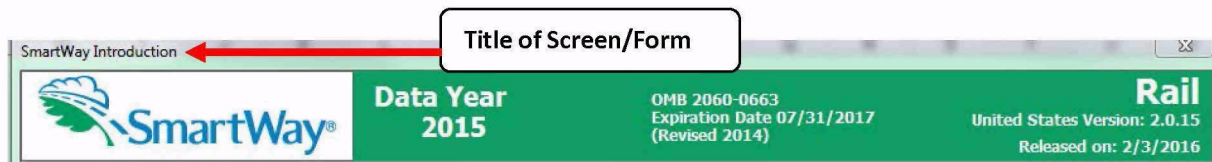


Figure 16 Screenshot of Title of Screen/Form

Each screen contains text instructions or information about the Program. Where applicable, the screen will also include buttons to link to the SmartWay website or other sections of the Tool (e.g., the various data entry screens); these buttons are shown in green with white text.



Figure 17 Screenshot of Button Link in the Tool

The screens also contain navigation buttons to direct you through the Tool.



Figure 18 Screenshot of Selected Navigation Buttons in the Tool

When new concept/topic is introduced on a screen, a small question mark ([?]) appears next to it. When you select the question mark, you will find additional definitions of terms or instructions to help you complete the screen properly.

Reviewing the Introductory Screens

Before you reach your data entry section of the Tool, you will move through four introductory pages that allow you to review the basics of participation in SmartWay for Rail Carriers:


- **The “SmartWay Introduction” Screen**
- **The “SmartWay Partnership Annual Agreement” Screen**
- **The “Required Information” Screen**
- **The “SmartWay Partner Schedule” Screen**

The features of these four screens are described below.

The “SmartWay Introduction” Screen

The [SmartWay Introduction](#) screen is the first window that appears when the Tool is opened (Figure 19). This screen contains a button linking to the SmartWay website where you can view and download additional information about the Program, the Tool, and the technical basis for the calculations in the Tool.

SmartWay Introduction



**Data Year
2015**

OMB 2060-0663
Expiration Date 07/31/2017
(Revised 2014)

Rail
United States Version: 2.0.15
Released on: 2/3/2016

Introduction

Welcome to the SmartWay Rail Tool. This version of the Rail Tool encompasses rail freight movements.

For additional information such as the Tool user guide, technical manual or other support materials, select the button below:

[Go To Rail Tool Page of the SmartWay Website](#)

Or call the SmartWay Helpline at: (734) 214-4767
Or email the Helpline at: smartway_transport@epa.gov

Tool Help and Navigation

Throughout the Tool, you will see numerous buttons. Becoming familiar with these buttons will make completing the Tool easier and faster. If a button contains an underlined character, you can also select that button using the keyboard by typing the {Alt} key along with the underlined character.

<p>HELP Provides instructions for completing each screen.</p> <p>ADD COMMENTS Allows you to add notes or clarifications. The button text changes if a comment has been entered.</p> <p>VALIDATE SCREEN Checks your data input for missing or invalid information.</p> <p>ZOOM IN Enlarges the text on the screen.</p> <p>PRINT SCREEN Sends an image of the screen to your default printer.</p>	<p>NEXT Proceed to the next screen.</p> <p>BACK Return to the previous screen.</p> <p>? Provides additional information about data entry fields.</p>
--	---

FILING FORMS WITH THE FEDERAL GOVERNMENT AND ESTIMATED REPORTING BURDEN: Respondents are not required to file or reply to any Federal collection of information unless it has a valid OMB control number. Public reporting burden for this collection of information is estimated to average 5.82 hours per response for initial registration, 2.66 hours for each annual update. These estimates include the time for reviewing instructions, searching existing data sources, gathering the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information including suggestions for reducing this burden to: SmartWay Transport Partnership, 2000 Traverwood, Ann Arbor, MI 48105, or the Office of Information and Regulatory Affairs, Office of Management and Budget, Washington D.C.

ZOOM IN

PRINT SCREEN

NEXT

QUIT

Page R-1

Figure 19: SmartWay Introduction Screen

○

The “SmartWay Partnership Annual Agreement” Screen

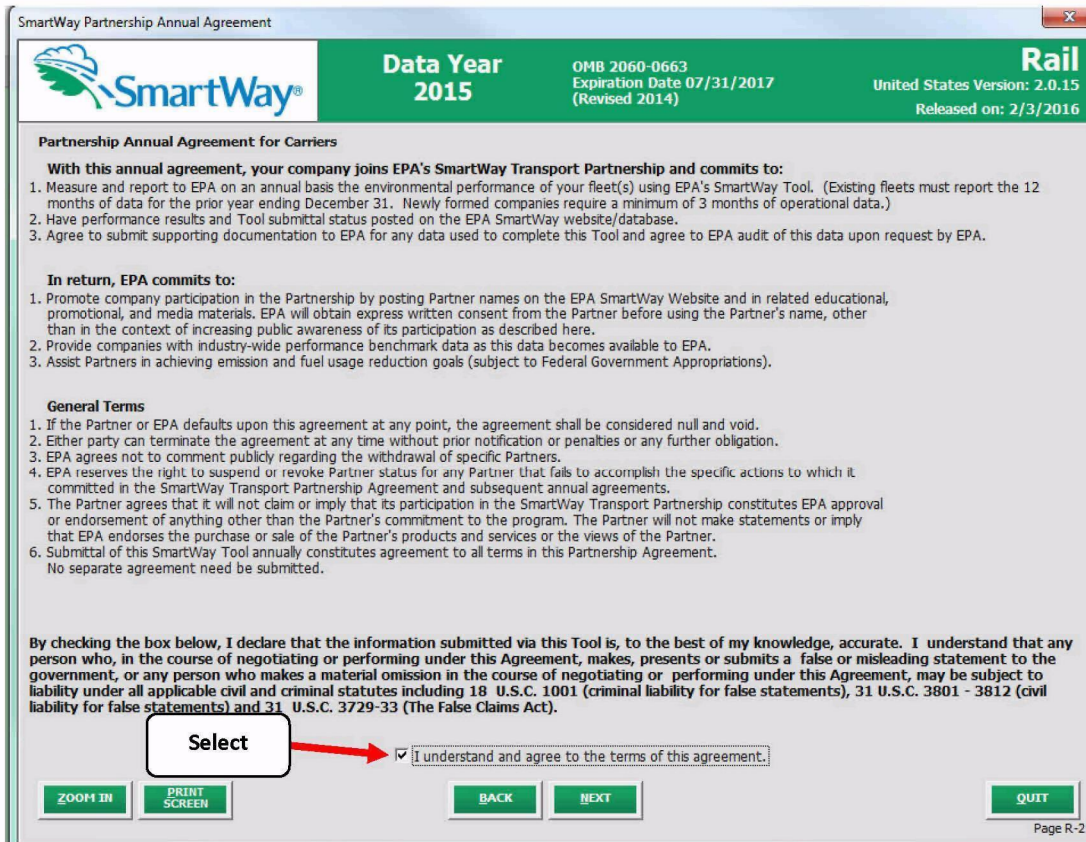



Figure 20: SmartWay Partner Agreement

After selecting the  button on the [SmartWay Introduction](#) screen, the [SmartWay Partnership Annual Agreement](#) will appear. This screen replicates the agreement language found in Part 1 of this users guide series.

Submitting a SmartWay Rail Tool to EPA constitutes agreement to all terms in the Partnership Annual Agreement, so please review this screen or the text version in Part 1 of this users guide series **before** sending your Tool to EPA.

To reach the data entry sections of the Tool, you must agree to this language to join the SmartWay Transport Partnership by selecting the check box at the bottom left of the screen.

SmartWay Rail Tool submissions are due on an annual basis; therefore, when you submit your tool each year, this will constitute your renewal of your Partnership Agreement. **Failure to send your annual Tool update will constitute a violation of the terms of the Agreement and will result in immediate removal of your company name/fleet from the SmartWay Partner List.**

The “Required Information” Screen

This screen provides a summary listing of the information you will need to collect to complete the SmartWay Rail Tool. Each of these items is discussed in detail later in this guide. Please refer to Part 2 of this guide series for a further discussion of the process used to gather the necessary data for the Tool.

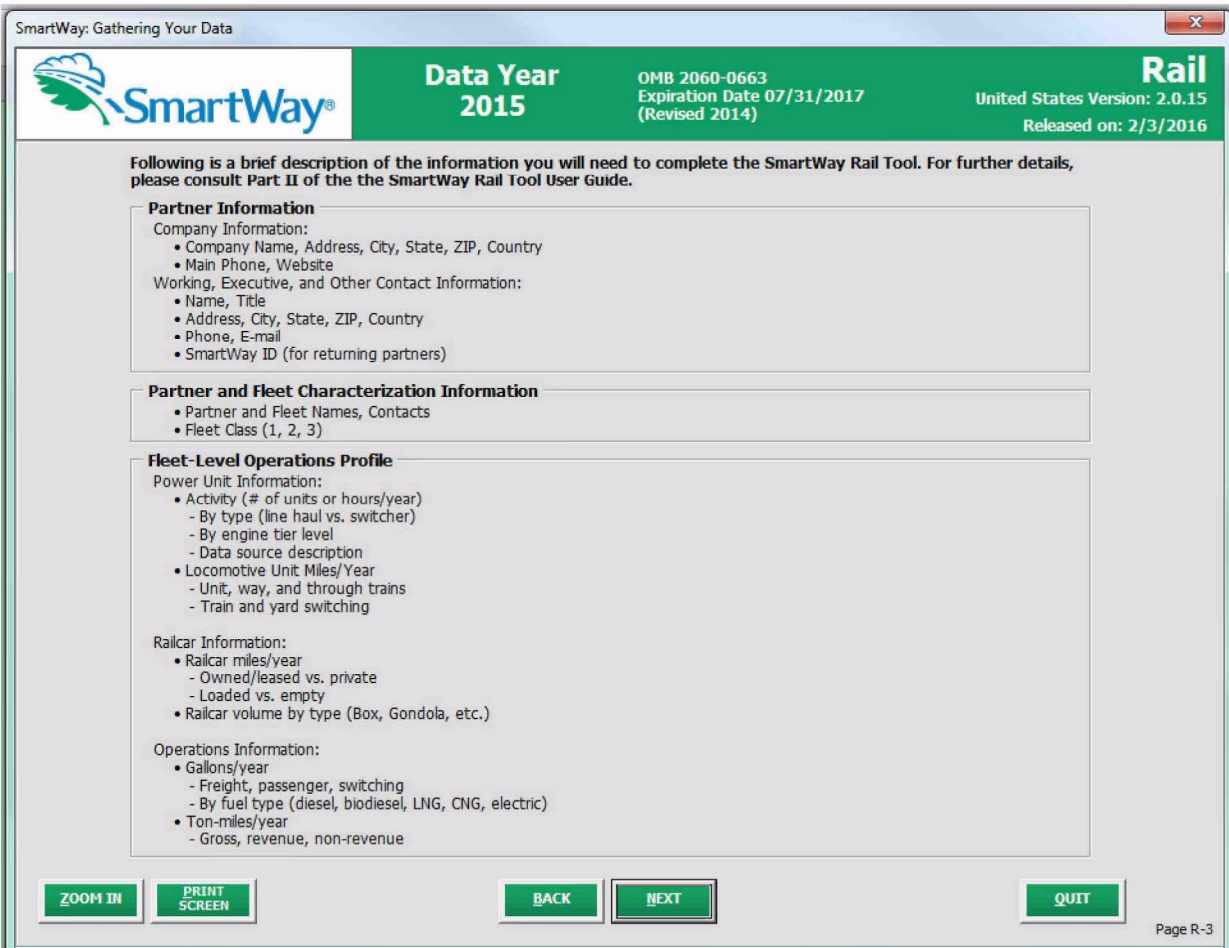


Figure 21: Summary of Required Information

The “SmartWay Partner Schedule” Screen

The **SmartWay Schedule of Tool Due Dates** screen shows the release dates and due dates for the various Partner tools for the 2016 calendar year (**Figure 22**). The screen also shows how the outputs from the various carrier tools serve as inputs to other “downstream” tools such as Multi-modal, Logistics, and Shipper.

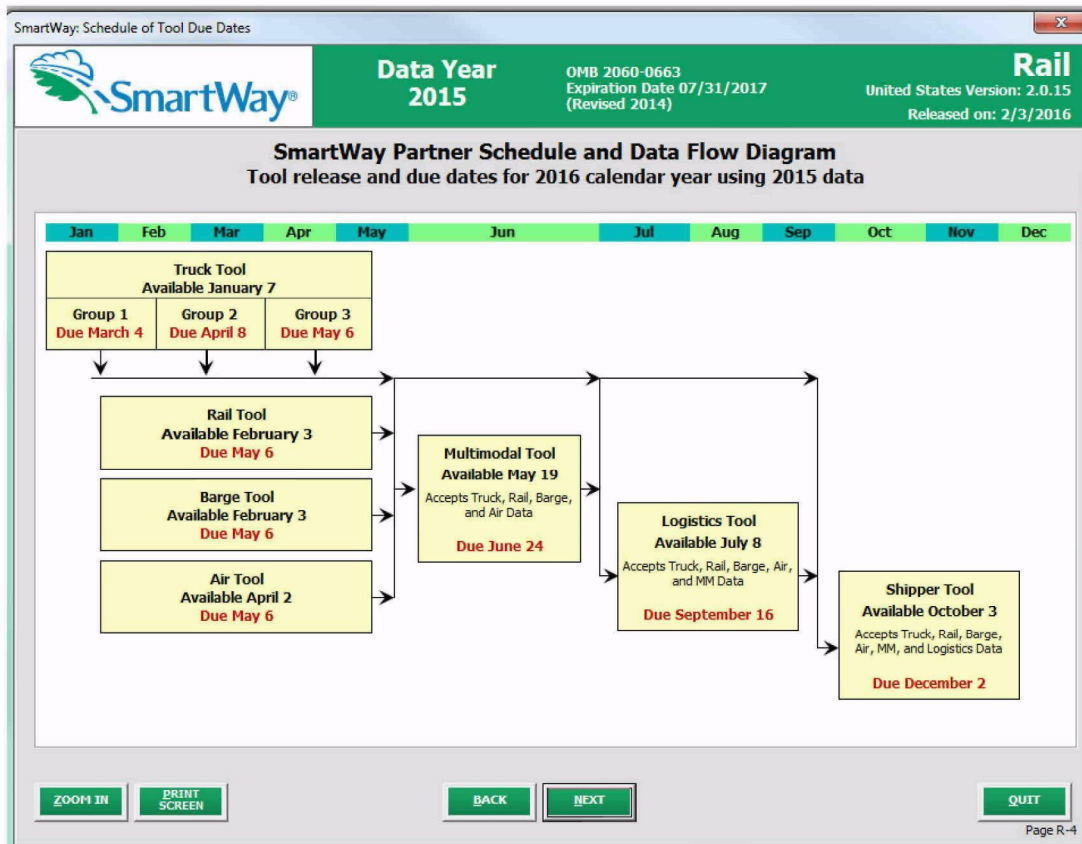


Figure 22: Screenshot of the Shipper Schedule Screen

Once you have navigated through the four introductory screens, you will be taken to the SmartWay Rail Tool [Home](#) screen.

Navigating the “Home” Screen

Figure 23 displays the structure of the **Home** screen.

SmartWay Rail: Home

SmartWay **Data Year 2015** OMB 2060-0663 Expiration Date 07/31/2017 (Revised 2014) **Rail** United States Version: 2.0.15 Released on: 2/3/2016

Please complete the following steps. Check boxes on the left indicate successful completion of each step. For more information, select the 'Help' button.

1. **Enter Partner Name** (Exactly as it should appear on the SmartWay website):
2. **Contact Information**
3. **Characterize your fleets**
4. **Data Entry** (Double-click the fleet name or select and hit Enter):
5. **Partner Profile / Suggestions** ?
6. **View Your Data Reports**
7. **Generate a (.xml) data file** ?

** After selecting this option, be sure to carefully read all directions before proceeding.*

BACK **ZOOM IN** **PRINT SCREEN** **SAVE** **QUIT** **HELP**

Page R-5

Figure 23: Main Tool Navigation or “Home” Screen

From the [Home](#) screen, you can:

- 1) Specify your Partner Name;
- 2) Fill out company contact information;
- 3) Characterize your fleet(s) and create your blank data entry forms;
- 4) Enter the required data for each fleet;
- 5) Provide additional optional information and suggestions;
- 6) View results of your data entry; and,
- 7) Create the final file to submit to EPA.

There are seven sections on the [Home](#) screen. With the exception of the first, each section links to additional screens or worksheets within the tool which are described below:

- 1. Enter Partner Name (data field):** Specify your company's Partner Name, exactly as you want it to appear on the SmartWay website.
- 2. Contact Information (button):**


This button takes you to a screen that asks for general company contact information, a working SmartWay point of contact, and an executive-level contact. Additional contacts may also be included.
- 3. Characterize your Fleets (button):**

This button takes you to a screen where you will define all the fleets your company operates and provide information describing their operation. Once these parameters are defined, the software will enable you to generate blank data entry forms for each fleet.
- 4. Data Entry (list):** This section allows you to select the fleet for which you will be entering performance and fleet composition information necessary to calculate efficiency metrics for your fleet; a list will indicate the fleet(s) defined and characterized in Section 3.
- 5. (Optional) Partner Profile / Suggestions (button):** Here you can give EPA feedback about the SmartWay program. This information is optional and is not required in order to submit your Rail Tool to EPA.
- 6. (Optional) View Your Data Reports (button):** Here you can view final summaries of your data including all data inputs, fleet performance summaries, and a summary of entered comments.
- 7. Generate a (.xml) data file (button):** This button creates a version of the Tool (in XML format) for you to send as an attachment in an e-mail to your Partner Account Manager (PAM), along with the Tool itself. Selecting the **OK** button on this screen does *not* automatically submit the file to EPA; you still need to submit it to EPA by attaching it in an e-mail.

Entering Your Data


The first four sections of the home screen must be completed in order, and comprise all the steps needed to complete your SmartWay Rail Tool. After they are completed, you can review your output and/or submit your Tool to EPA.

Saving Your Data



At any stage of the process above, you can save the data you have entered by selecting the  button that appears at the bottom of all screens (including the [Home](#) screen). We recommend saving your data frequently if you are entering information for large numbers of fleets.

Validating Your Data

The SmartWay Carrier Tools include a variety of range checks and other validation rules designed to help identify potential data entry errors and/or unusual data values. In order to identify potential problems with your data entry and ensure the highest quality in your data submission, we highly recommend

selecting the  button at the bottom of each screen after completion of each data entry screen. The Tool will then identify any potential data problems on that screen for you to modify or to provide a text explanation. Please refer to the **Rail Tool Technical Documentation** available from the Rail Tool page of the SmartWay website, for details regarding the validation ranges used in the Tool.

Reviewing Your Data

Each screen within the tool has a  button. If you need a hard copy of introductory screen text you may select this button to send a copy to your default printer. Selecting the  button on data entry screens will direct you to a specific report under the **Reports Menu**. The data reports provided by the Rail Tool are discussed in detail in the **View Your Data Reports** section of this guide.

Entering Your Data

You must complete the first four sections of the **Home** screen in order. The next four sections of this guide explain how to enter your data on each of the screens.

Section 1 Data Entry: Enter Partner Name

Here you must specify your company's **Partner Name**, exactly as you want it to appear on the SmartWay website. For example, if your company's name includes "Inc." or "Ltd.," you may choose not to include that in your **Partner Name**. Please also pay special attention to proper capitalization, abbreviations, and punctuation.

The screenshot shows the 'SmartWay Rail: Home' interface. At the top, there is a green header with the SmartWay logo, 'Data Year 2015', OMB 2060-0663, Expiration Date 07/31/2017 (Revised 2014), and 'Rail United States Version: 2.0.15 Released on: 2/3/2016'. Below the header, instructions state: 'Please complete the following steps. Check boxes on the left indicate successful completion of each step. For more information, select the 'Help' button.'

The main content area lists seven steps:

- 1. Enter Partner Name** (Exactly as it should appear on the SmartWay website):
A text input field contains 'Mountain Rail, Inc.'. A red arrow points from a callout box labeled 'Enter Partner Name' to this field.
- 2. Contact Information**
- 3. Characterize your Fleets**
- 4. Data Entry** (Double-click the fleet name or select and hit Enter):
A large empty text area is provided.
- 5. Partner Profile / Suggestions** ?
- 6. View Your Data Reports**
- 7. Generate a (.xml) data file** ?

A note below step 7 reads: '* After selecting this option, be sure to carefully read all directions before proceeding.'

At the bottom, there are buttons for BACK, ZOOM IN, PRINT SCREEN, SAVE, QUIT, and HELP. The page number 'Page R-5' is in the bottom right corner.

Figure 24: Enter Partner Name on Home Screen

Section 2 Data Entry: Enter Company and Contact Information

PLEASE REFER TO [WORKHEET #1: Company Contact Information](#) from Part 2 of this guidance to complete this section of the Rail Tool.

From the [Home](#) screen, select the [Contact Information](#) button.

The screenshot shows the 'SmartWay Rail: Home' interface. At the top, there is a green header with the SmartWay logo, 'Data Year 2015', OMB 2060-0663, Expiration Date 07/31/2017 (Revised 2014), and 'Rail United States Version: 2.0.15 Released on: 2/3/2016'. Below the header, a message reads: 'Please complete the following steps. Check boxes on the left indicate successful completion of each step. For more information, select the 'Help' button.' The main content area contains a list of steps:

1. Enter Partner Name (Exactly as it should appear on the SmartWay website):
Mountain Rail, Inc.
2. [Contact Information](#)
3. [Characterize your fleets](#)
4. Data Entry (Double-click the fleet name or select and hit Enter):
[Empty text box]
5. [Partner Profile / Suggestions](#) ?
6. [View Your Data Reports](#)
7. [Generate a \(.xml\) data file](#) ?

* After selecting this option, be sure to carefully read all directions before proceeding.

At the bottom, there are buttons for BACK, ZOOM IN, PRINT SCREEN, SAVE, QUIT, and HELP. A red arrow points from a callout box labeled 'Select Contact Information' to the 'Contact Information' button in step 2.

Figure 25: Select Contact Information Button on Home Screen

You will then be taken to the [Contact Information](#) screens. These screens will ask you to, provide the following information:

1. Company Information
2. Working Contact information
3. Executive Contact (Vice President or higher)
4. Other Contacts

SmartWay: Contact Information

Partner Information	Working Contact	Executive Contact	Other Contacts
Address1* 645 Main Street			
Address2 Suite 203			
City* Phoenix	State* AZ	ZIP* 85968	Country* USA
Main Phone* 765-898-4576	Toll Free 888-898-4545		
Web Site www.mountainrail.com			Show
<p>There must be at least two different people that SmartWay can contact. The Working Contact is the person assigned to work directly with EPA regarding timely and accurate Tool submission, and maintaining direct communication with SmartWay.</p> <p>The Executive Contact is the company executive who is responsible for agreeing to the requirements in the SmartWay Partnership Annual Agreement and ensuring timely submission of the Tool to SmartWay. The Executive Contact should be a Vice President or higher-level representative for the company.</p>			
Working Contact: ?			
Name	Mr. First* Patrick	MI	Last* Swenson
Title*	VP Operations		
Executive Contact: ?			
Name	Mr. First* Jerod	MI	Last* Lane
Title*	CEO		
* - Required			
NEXT		ZOOM IN	PRINT SCREEN
HOME		VALIDATE SCREEN	ADD COMMENTS
		HELP	

Page R-6

Figure 26: Entering Company and Contact Information

Each field marked with an asterisk must be filled out. You will not be able to submit the Tool to SmartWay without this information.

Steps for Entering Contact Information:

Under the Partner Information tab:

1. Enter the Company data.

2. **Enter the Working Contact name and title.**

The **Working Contact** is the individual designated by the Executive Contact to directly interface with SmartWay regarding specific tasks involved in the timely submission of the Tool. The Working Contact is responsible for coordinating the assembly of information to complete/update fleet data; completing and updating the Tool itself; maintaining direct communication with SmartWay; and keeping interested parties within the company apprised of relevant developments with SmartWay. (NOTE: To ensure that e-mails from SmartWay/EPA are not blocked, new contacts may need to add SmartWay/EPA to their preferred list of trusted sources.)

3. **Enter the Executive Contact name and title**

The **Executive Contact** is the company executive who is responsible for agreeing to the requirements in the SmartWay Partnership Annual Agreement, overseeing the Working Contact (as appropriate), and ensuring the timely submission of the Tool to SmartWay. The Executive Contact also represents the company at awards/recognition events. This person should be a Vice President or higher level representative for the company.

Under the Working Contact tab:

The screenshot shows a web application window titled "SmartWay: Contact Information". It has four tabs: "Partner Information", "Working Contact" (which is selected and highlighted in blue), "Executive Contact", and "Other Contacts". The main content area contains a form with the following fields and values:

- Name: Patrick Swenson
- Address1*: 645 Main Street
- Address2: Suite 203
- City*: Phoenix
- State*: AZ (dropdown menu)
- ZIP*: 85968
- Country*: USA
- Phone*: 765-898-4004
- Ext: 121
- Cell: 765-456-9192
- Fax: 765-898-1111
- Email*: patrick.swenson@mountainrail.com
- Confirm Email*: patrick.swenson@mountainrail.com

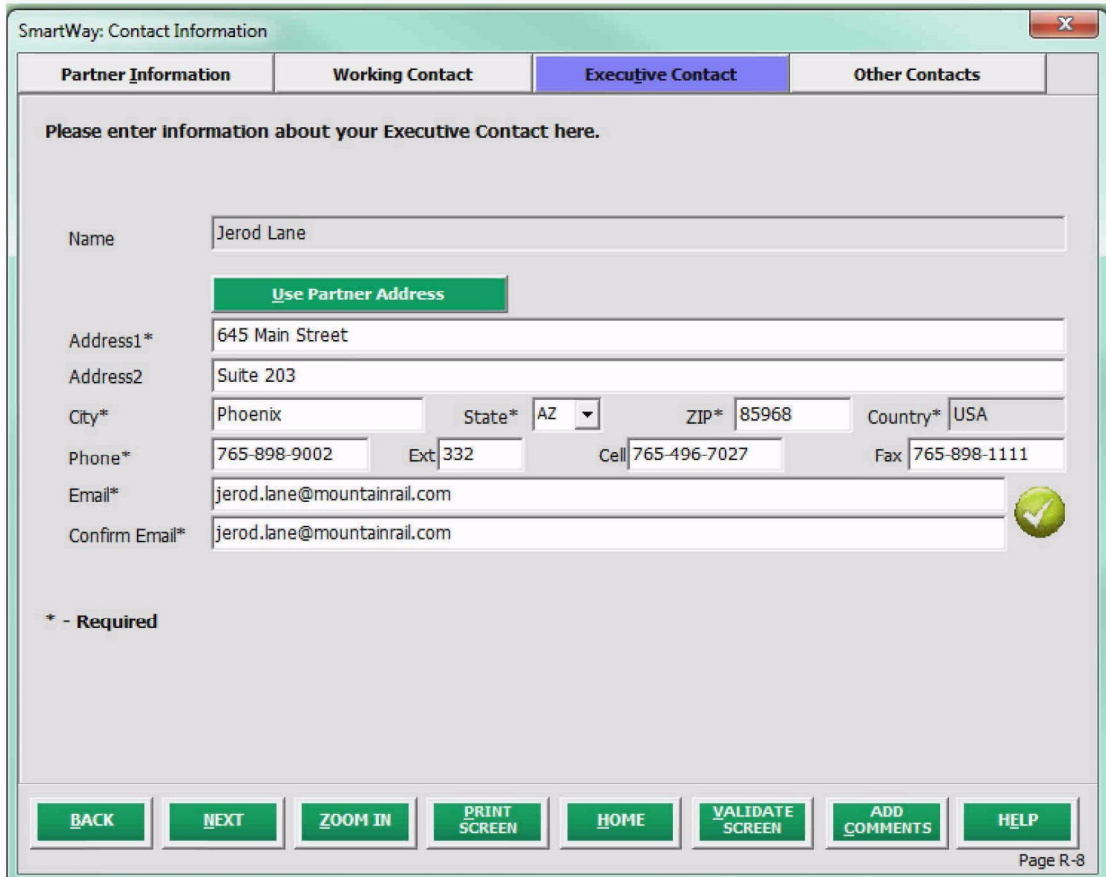
A green checkmark icon is visible next to the Confirm Email field. A green button labeled "Use Partner Address" is located above the Address1 field. At the bottom of the form, there is a legend: "* - Required". Below the form are several green buttons: "BACK", "NEXT", "ZOOM IN", "PRINT SCREEN", "HOME", "VALIDATE SCREEN", "ADD COMMENTS", and "HELP". The page number "Page R-7" is displayed in the bottom right corner.

Figure 27. Working Contact Information Screen

Enter the Working Contact information. If the Working Contact shares the same address as the company, you may select the **Use Partner Address** button to auto-populate the address section of this record. Enter the email address twice to confirm its accuracy. When

confirmed a  will appear to the right.

Under the Executive Contact tab:



SmartWay: Contact Information

Partner Information Working Contact **Executive Contact** Other Contacts

Please enter information about your Executive Contact here.

Name Jerod Lane

Use Partner Address

Address1* 645 Main Street

Address2 Suite 203

City* Phoenix State* AZ ZIP* 85968 Country* USA

Phone* 765-898-9002 Ext 332 Cell 765-496-7027 Fax 765-898-1111

Email* jerod.lane@mountainrail.com

Confirm Email* jerod.lane@mountainrail.com

* - Required

BACK NEXT ZOOM IN PRINT SCREEN HOME VALIDATE SCREEN ADD COMMENTS HELP

Page R-8

Figure 28. Executive Contact Information Screen

Enter the Executive Contact information. If the Working Contact shares the same address as the company, you may select the **Use Partner Address** button to auto-populate the address section of this record.

Under the Other Contacts tab:

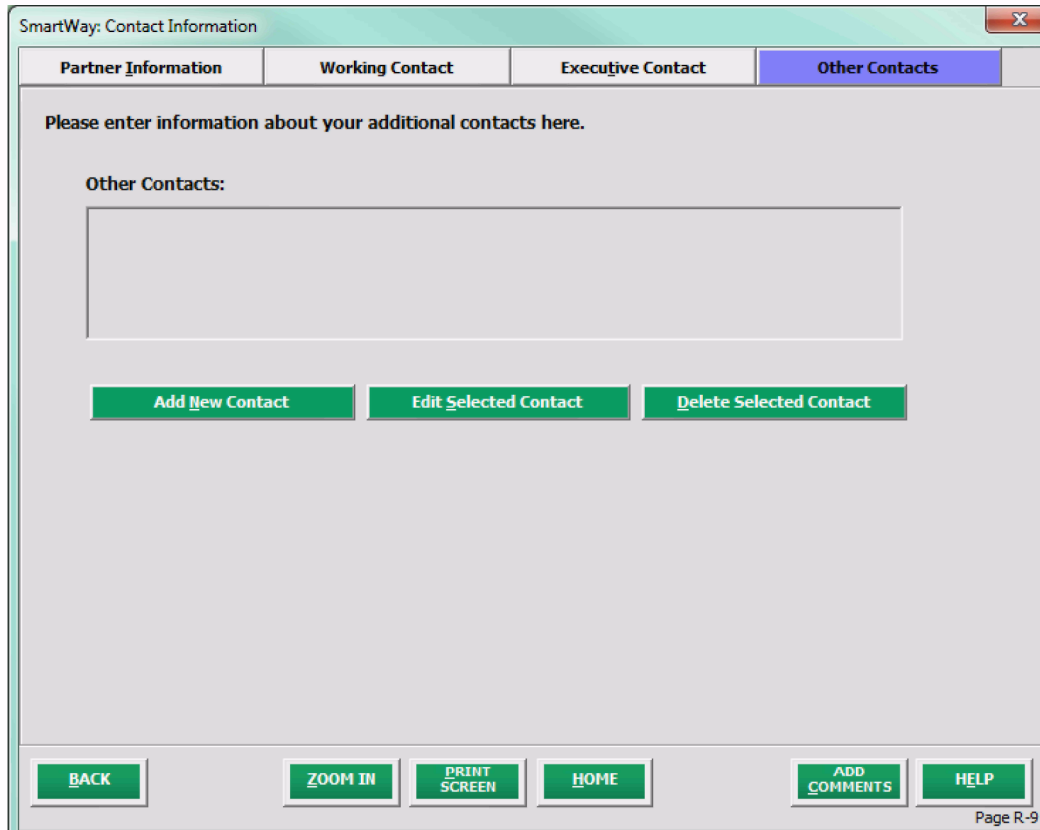



Figure 29. Other Contact Information Screen


1. Enter Other Contacts (if applicable) by selecting the **Add New Contact** button.
2. Enter the first Other Contact then select **OK** when done.

Note: You must supply at least two unique contacts on the contact screen to ensure EPA has access to at least two people for Tool submission follow-up.

NOTE: In some cases, companies with multiple fleets will gather information from different sources within the company. You may find it useful to have this additional contact information stored within the Tool.

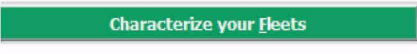
You can add more contacts to the **Other Contacts** box by repeating this process. If you wish to edit an existing contact's information, highlight the name you wish to edit and then select the **Edit Selected Contact** button. You can remove an existing contact by highlighting the contact and then selecting **Delete Selected Contact**.

To make sure you have filled out all required contact information, select  at the bottom of the screen on the Partner Information tab. If any information is missing or invalid, a dialogue box will appear informing you what additional information is required.

4. Next select the  button to return to the [Home](#) screen and go to Step 3.

Section 3 Data Entry: Characterize your Fleets

PLEASE REFER TO [WORKHEET #2: Fleet Characterization](#) of Part 2 of this guidance to complete this section of the Rail Tool.

Next, on the [Home](#) screen select  to display the [Fleet Characterization](#) screen. This is the section where you will define the various components of your fleets.

The [Fleet Characterization](#) screen is shown below:

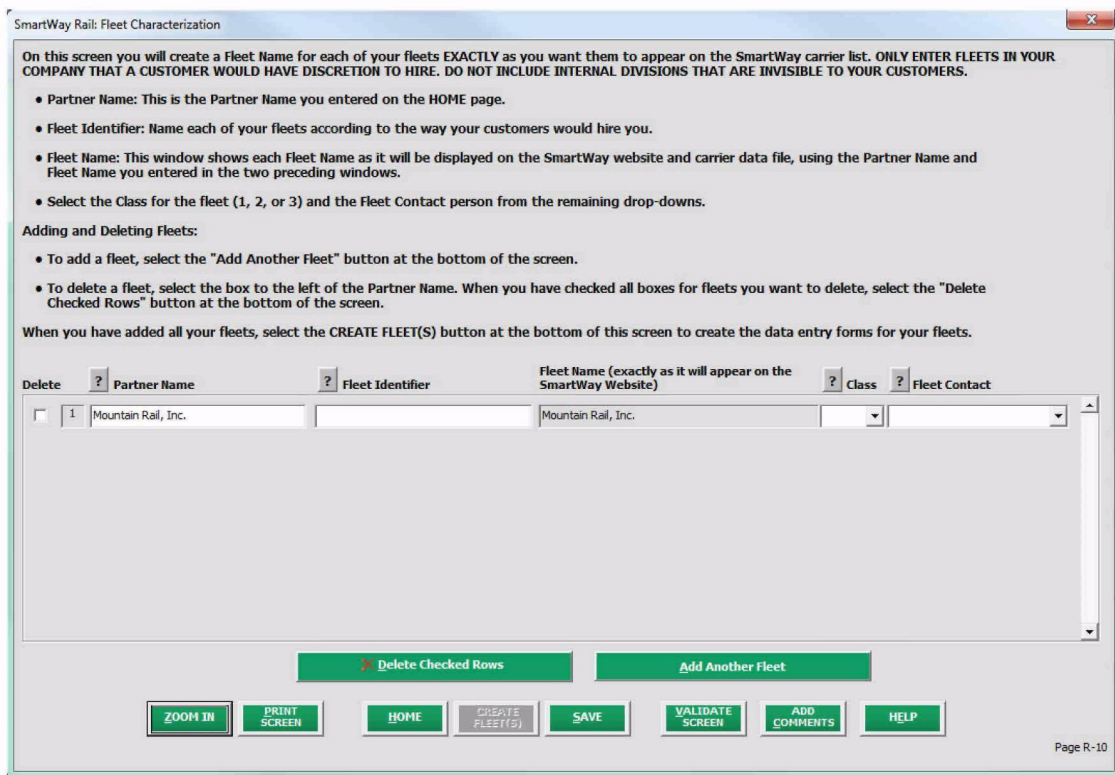




Figure 30: Blank Fleet Characterization Screen

Steps for Completing Fleet Characterization Screen:

For each fleet, you will need to specify:

- **Partner Name:** On the SmartWay website, each of your fleet names will begin with the name of your company. This fleet name will be whatever you enter in the **Partner Name** field on the Tool screen. By default, this field is automatically populated with the first 50 characters of the **Partner Name** that is entered on the **Home** screen. You should specify the name so that it appears EXACTLY as it you want it to show within each fleet name. (For example, if your company's name includes "Inc." or "Ltd.", you may choose not to include that in your fleet names.) Please pay special attention to proper capitalization, abbreviations, and punctuation.
- **Fleet Identifier:** Specify each fleet identifier exactly as you want it displayed on the SmartWay website, including proper capitalization, any abbreviations, and punctuation. Remember that it will automatically be combined with the **Partner Name** field.
- **Class:** Enter the Class of the associated rail fleet (1, 2, or 3).
- **Fleet Contact:** This contact should be one of the contacts you already identified in the **Contact Information** section as the contact for each fleet. **NOTE:** A drop-down menu in the Tool will supply this information; if there is a contact for the fleet that is not already listed in the Contacts worksheet, you will need to go back to that screen to add the required contact information.

Adding Fleets

To enter another fleet, select the  button. To delete a fleet, select the box next to the row you wish to delete, and then select the  button.

Once you have confirmed or modified the **Partner Name** and specified the **Fleet Identifier**, the full **SmartWay Website Fleet Name** will be displayed on the screen to the right, exactly how they will be displayed on the SmartWay website.

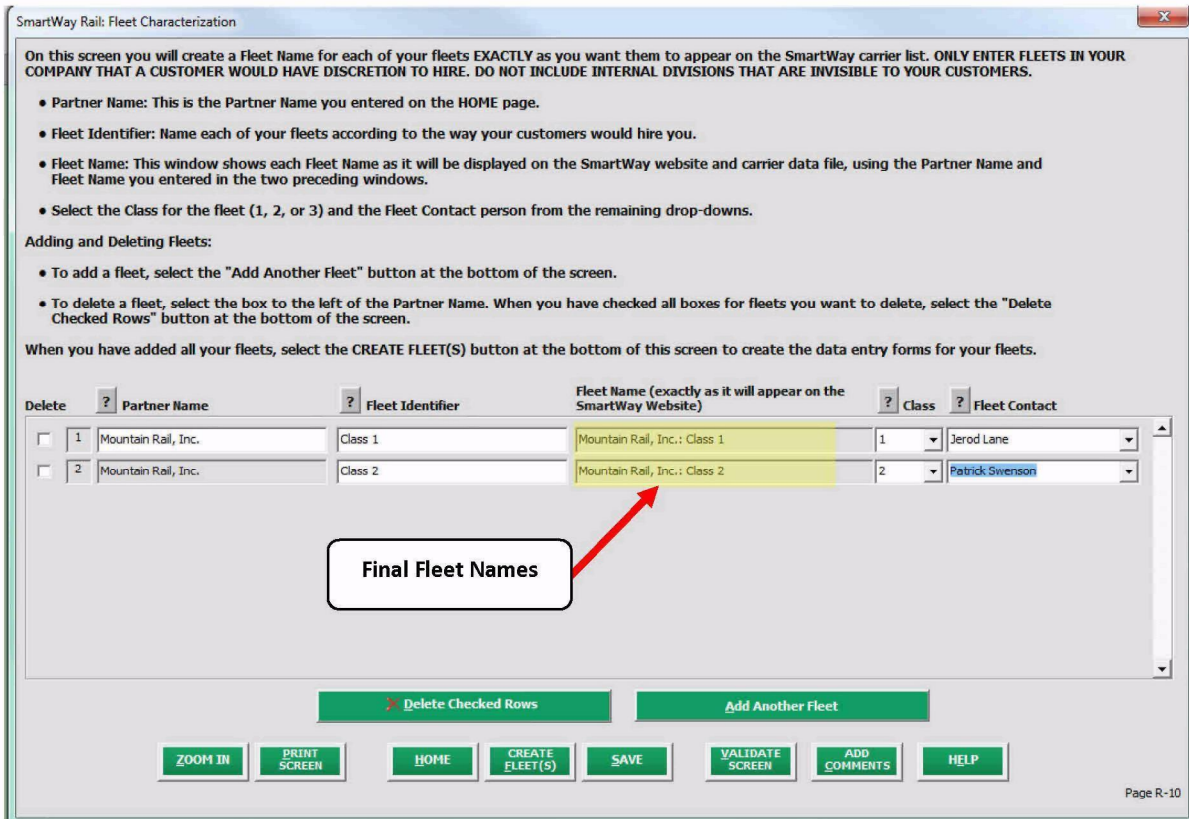


Figure 31: Example Fleet Name Definition




Remember to create separate fleets for each entity your customers have discretion to hire.

Adding Comments/Notes


Creating useful comments assists SmartWay Tool reviewers in approving your Tool as quickly as possible. Your comments help reviewers understand your business operations. Any details that you can provide related to your operations will speed up approval time.




Please note the  button located at the bottom of the screen. This allows you to enter notes about the collection process, your assumptions and methods, data, or other information. These details could prove useful for your reviewer when you or someone else fills out the Tool next year.

If comments have been added for a particular screen, the  button will be highlighted in

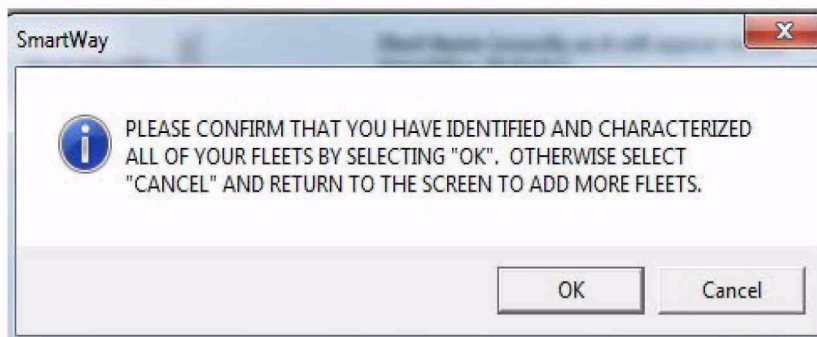
yellow on your screen and will now read  to indicate to your reviewer that there are comments to be read.

A  button is also available should you need assistance. You will also notice small gray icons with question marks [?] displayed throughout the Tool. When selected, these icons provide additional information about specific items located on the screen.

If, at a point later in the data entry process, you realize that you need to add a new fleet or delete an existing fleet, you can return to the **Fleet Characterization** screen. To add a new fleet, follow all of the

instructions on the screen regarding defining your fleets, including selecting the  button at the end of the process. When you select this button, the system will create blank data entry forms only for the new fleet(s) you have added; the existing fleets will not be affected.

NOTE: After selecting the CREATE FLEET(S) button you will be asked to confirm that you have identified all of your fleets (see below). Select OK to proceed or CANCEL to add more fleets.



If you need to delete an existing fleet, simply check the box next to the fleet and then select the **Delete Checked Rows** button.

As on the other screens there is a  button as well as an  button. Selecting  will take you back to the **Home** screen (see **Figure 23**).

Reviewing Fleet Status

On the **Home** screen, you will now see all the fleets you created listed in the window below item # 4: **Data Entry**.

The screenshot shows the SmartWay Rail Home interface. At the top, there is a green header with the SmartWay logo, 'Data Year 2015', OMB 2060-0663, Expiration Date 07/31/2017 (Revised 2014), and 'Rail United States Version: 2.0.15 Released on: 2/3/2016'. Below the header, a message reads: 'Please complete the following steps. Check boxes on the left indicate successful completion of each step. For more information, select the 'Help' button.'

The steps are listed as follows:

1. Enter Partner Name (Exactly as it should appear on the SmartWay website):
Mountain Rail, Inc.
2. **Contact Information**
3. **Characterize your fleets**
4. Data Entry (Double-click the fleet name or select and hit Enter):
Mountain Rail, Inc.: Class 1 - Not Checked
Mountain Rail, Inc.: Class 2 - Not Checked
5. **Partner Profile / Suggestions** ?
6. **View Your Data Reports**
7. **Generate a (.xml) data file** ?

A red arrow points from a box labeled 'Fleet Status Indicators' to the text 'Mountain Rail, Inc.: Class 1 - Not Checked' in step 4. Below step 7, a note reads: '* After selecting this option, be sure to carefully read all directions before proceeding.'

At the bottom, there are buttons for BACK, ZOOM IN, PRINT SCREEN, SAVE, QUIT, and HELP. The page number 'Page R-5' is in the bottom right corner.

Figure 32. Home Screen – Fleet Status Prior to Activity and Fuel Data Entry

There will be a status message after each fleet, indicating whether or not the data entry for that fleet is complete. The following information may appear beside a fleet name:

- **Not checked** - Data has not been entered yet.
- **Incomplete** - Some data is still missing and/or inconsistent.
- **Complete** - All data requirements have been met and validation has occurred.

In addition to the status indicators above, you may also see an “Error” qualifier. **Errors** will prevent you from generating the **Internal Metrics Reports** and must be addressed before you can submit your Tool to EPA.

To add data to a particular fleet file, highlight the fleet name and then double-click. You will then proceed to the tool **Data Entry Screens**.

Section 4 Data Entry: Enter activity and fuel consumption information for each of your fleets

Steps for Completing Power Units Screen

At this stage, you will be entering information about each fleet separately. For each fleet you will first fill out the **Power Units** screen, shown below in **Figure 33**.

Rail: Mountain Rail, Inc.: Class 1

Power Units Cars Operations

Please enter information on your power units. Select the data entry method (1 through 4) for part A, and then fill out the required information in the boxes provided. Next fill out the part B data. Finally, describe the sources for all the data on this page in the text area below.

Part A: Power Unit Inventory

Select Data Input Method

1. # of total Power Units

2. # Power units - line haul vs. switch

3. hours per tier

4. hours per tier - line haul and switch

Engine Tier # of Power Units

Engine Tier	# of Power Units
non-tier	
0	
0+	
1	
1+	
2	
2+	
3	
4	

Part B: Total Locomotive Unit Miles/Year

Unit Trains	
Way Trains	
Through Trains	
Subtotal	
Train Switching	
Yard Switching	
Subtotal	
Total	

Describe the source of information used to generate the user input values

3000 characters remaining

NEXT **ZOOM IN** **PRINT SCREEN** **HOME** **SAVE** **VALIDATE SCREEN** **ADD COMMENTS** **HELP**

Page R-11

Figure 33. Power Units Screen

PLEASE REFER TO **WORKHEET #3: Power Units** in Part 2 of this guidance to begin data entry for this section of the Rail Tool. Use the instructions below if you have questions about filling in the data.



NOTE: If you are a new SmartWay Partner you should enter the most recent 12 months of data into the tool. If you do not have a full year of operational data, please collect a minimum of three months' data for input into the SmartWay Tool. In your next update year, you will be required to submit a full year's data.


First, select your **Data Input Method**. You may select from four input methods, depending upon the type of data you have available. Methods 1 and 2 only require the input of the number of power units by engine tier level. Under Method 1 you may aggregate your fleet's line-haul and switch units together, while Method 2 requires that you report the unit type counts separately. Methods 3 and 4 are similar, but require inputting hours of operation by tier, rather than unit counts. **In general, Method 4 will provide the most accurate estimate for NOx and PM emissions, followed by Method 3.**

After selecting your preferred **Data Input Method**, please enter the tier-level data in the cells at the lower left of the screen. These data are used to estimate your fleet's NOx and PM emission performance levels. (See the **Rail Tool Technical Documentation** for details regarding emission performance calculations.) The different engine tier-level definitions are provided in the ? help text to the left of the cells.


Next, *for Class 1 fleets only*, enter your fleet's **Total Locomotive Unit Miles/Year** data under Part B. Break out your unit miles data by line haul and switching categories, as appropriate. **Note: the Part B data entry section is not presented for Class 2 and 3 fleets, given the difficulty of obtaining this data for smaller operations.**

Finally, enter a detailed description of the data sources used to obtain your power unit data (e.g., R-1 Form section and line numbers for Class 1 carriers).



You can select the  button to make sure you have filled out everything on this screen properly.



Once your **Power Units** data has been validated as complete and correct, select the  button or select the **Cars** tab at the top of the screen to proceed.

NOTE: The **Cars tab is not active for Class 2 and 3 fleets given the difficulty in obtaining car-mile data for smaller operations. For these fleets, proceed to the **Operations** tab.**

Steps for Completing Power Units Screen

PLEASE REFER TO **WORKHEET #4** in Part 2 of this guidance to complete this section of the Rail Tool.

Rail: Mountain Rail, Inc.: Class 1

Power Units | **Cars** | Operations

Please enter information on railcar miles below. These data are based on those provided in R1 report section 755 (R1 value x 1,000). You may enter your company-specific car volume data by selecting the Review/Update Volume Data button below.

Total Railcar Miles/Year	Owned and Leased		Private		Total
	Loaded	Empty	Loaded	Empty	
? Box - Plain 40'					
? Box - Plain 50'+					
? Box Equipped					
? Gondola Plain					
? Gondola Equipped					
? Hopper Covered					
? Hopper Open Top					
? Refrigerator Mechanical					
? Refrigerated Non-Mechanical					
? Flat TOFC/COFC					
? Flat Multi-Level					
? Flat General Service					
? Flat All Other					
? Tank Under 22,000 gallons					
? Tank Over 22,000 gallons					
? All Other Cars					
? Work Equip & Company Freight					
? No Payment Car-Miles					
Total					

Review/Update Volume Data
[Currently using Default volume data]

BACK NEXT ZOOM IN PRINT SCREEN HOME SAVE VALIDATE SCREEN ADD COMMENTS HELP

Page R-12

Figure 34. Cars Screen

Enter your Class 1 fleet's annual railcar miles for the reporting year on this screen, by car type (e.g., box, gondola, etc.) and ownership type (Owned/Leased or Private). These data may be obtained from R-1 Report Section 755. If available you can also provide fleet-specific railcar volumes by car type, by selecting the Review/Update Volume Data button (see **Figure 35**).

NOTE: Make sure to enter your car-mile data in actual miles, rather than 1,000's of miles (as reported in the R-1 forms).

NOTE: Hopper Open Top cars should include activity for both general service hoppers and special service hoppers.

SmartWay Data Volume by Car

Below are the default volume data by car type that will be used in calculations. These values reflect national averages across Class 1 carriers – see the Rail Tool Technical Documentation for details.

If you would like the Tool to use a different value, enter value(s) in the Fleet-Specific column; the default value will be used for any car type where an override value is not provided. Select OK to save and return or Cancel to return without saving changes.

	Default Values (cu ft)	Fleet-Specific Values (cu ft)
Box - Plain 40'	4,555	
Box - Plain 50'+	7,177	
Box Equipped	7,177	
Gondola Plain	5,190	
Gondola Equipped	5,190	
Hopper Covered	4,188	
Hopper Open Top	4,220	
Refrigerator Mechanical	6,202	
Refrigerated Non-Mechanical	6,202	
Flat TOFC/COFC	6,395	
Flat Multi-Level	13,625	
Flat General Service	6,395	
Flat All Other	6,395	
Tank Under 22,000 gallons	2,314	
Tank Over 22,000 gallons	3,857	
All Other Cars	5,014	
Work Equip & Company Freight	5,014	
No Payment Car-Miles	5,014	

ZOOM IN OK CANCEL

Page R-13

Figure 35. Volume by Railcar Type

The **Volume by Car** screen shows the default (Class 1 national average) railcar volumes used in the Rail Tool. (See the **Rail Tool Technical Documentation** for the sources of this data.) The railcar volume data from this form will be used to estimate the grams per truck-equivalent mile performance metrics for your fleet. You may enter your own fleet-specific volume data in the right hand column in order to override the default values.

Once your **Cars** data has been validated as complete and correct, select the



button or select the **Operations** tab at the top of the screen to proceed.

Steps for Completing the Operations Screen

PLEASE REFER TO [WORKHEET #5](#) in Part 2 of this guidance to complete this section of the Rail Tool.

Fuel Used	Units	Freight	Passenger	Switching	Total
Diesel	(gallons/year)				
Biodiesel: B	(gallons/year)				
LNG	(gallons/year)				
CNG	(cubic feet)				
Electric	(kWh/year)				

? Gross Ton Miles/Year [] R1: 755-104
? Revenue Freight Ton Miles/Year [] R1: 755-110
? Non-Revenue Freight Ton Miles/Year [] R1: 755-113

Figure 36. Operations Screen

You will enter your fleet's annual fuel consumption and ton-mile data on this screen. First enter annual fuel use per year by fuel type (diesel, biodiesel, LNG, CNG, and electric) and train category (freight, passenger, and switch). Petroleum diesel, biodiesel, and LNG entries must be in gallons per year. Specify your CNG units using the associated drop-down menu, indicating standard cubic feet or gasoline-equivalent gallons per year. Electricity use is specified in kWh/year.

If you enter biodiesel consumption data, you must also specify the blend level (between 0 and 100) in the cell to the left.

Next, enter your gross, revenue, and non-revenue ton-mile data at the bottom of the screen. The corresponding R-1 form section and line numbers for these are indicated on the screen for Class 1 fleets.

Once your **Operations** data has been validated as complete and correct you may return to the **Home** screen.

NOTE: Make sure to enter your ton-mile data in actual miles, rather than 1,000's of ton-miles (as reported in the R-1 forms).

NOTE: Switch engine fuel usage should also include fuels used by Work Trains involved in track maintenance (Schedule 750 line 6).

Viewing Your Fleet Status

Once you have returned to the **Home** screen, notice that the fleet for which you provided data now identifies its status as “Complete.” You may now highlight the next fleet if you have another one to complete. Fill out unfinished fleets in the same manner as the previous fleet.

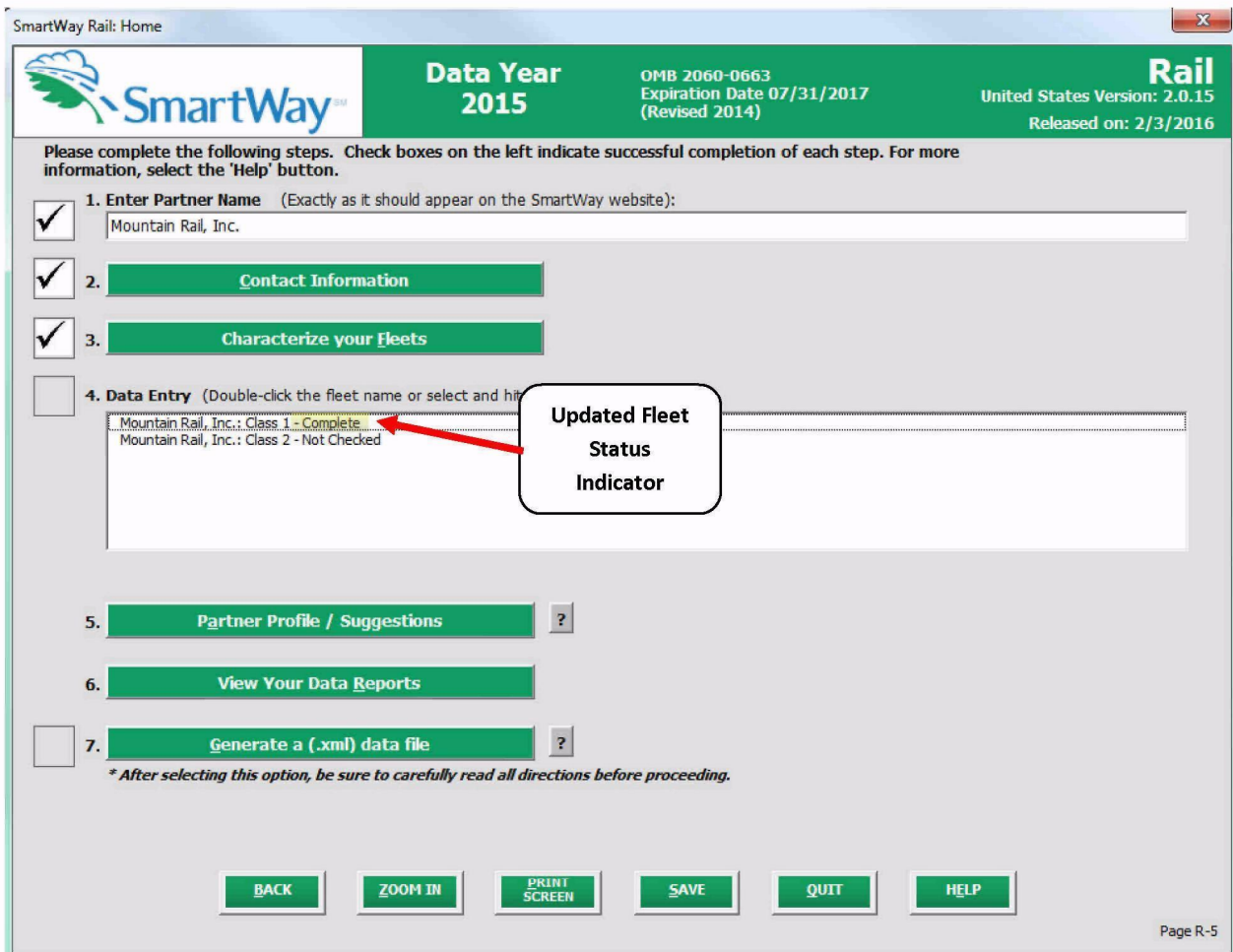


Figure 37. Home Screen after Data Entry for First Fleet

Provide Additional Information

After completing Steps 1 – 4 on the [Home](#) screen, you may provide EPA with additional information regarding your company and general feedback regarding the SmartWay Program. ***This information is optional and is not required in order to submit your Rail Tool data to EPA.***

Selecting the [Partner Profile / Suggestions](#) button on the [Home](#) screen will open the [Additional Information](#) screen (see [Figure 38](#)).

SmartWay Additional Information: Mountain Rail, Inc.

Partner Information Suggestions

Providing your information on **THIS PAGE** is **OPTIONAL**. SmartWay will use the information you submit via this page to make a **PUBLIC** partner company page on the SmartWay website. Please limit your responses to the specific questions asked as SmartWay will review your submission for appropriateness. SmartWay will not edit the data for spelling or grammar so please make sure it appears below **EXACTLY** as you want it displayed.

Partner Name: Mountain Rail, Inc.

Link to your company's environmental or SmartWay web page:

Executive Officer's quote on your SmartWay participation: (500 characters max)

Description of your best investment in emissions or fuel saving best practices: (3000 characters max)

Goal for SmartWay participation: (3000 characters max)

* The explanation field does not wrap in Office 2013 due to an Excel bug.

My company encourages other companies to join SmartWay to improve their efficiency by: (1000 characters max)

NEXT **ZOOM IN** **PRINT SCREEN** **HOME** **SAVE** **ADD COMMENTS** **HELP**

Page R-19

Figure 38. Partner Information Screen

Use this page to provide information you would like to share publicly. Information should be entered in the text boxes displayed. Use the scroll bar to the right to display additional questions. SmartWay will use this information to create a SmartWay Partner profile page for your company on the SmartWay website. You do not need to complete every question. SmartWay will NOT edit for spelling or grammar, so make sure the text is exactly as you wish it to appear. If your company contains public relations functions, you may want them to review this information before submittal, however, keep your SmartWay due date in mind. SmartWay WILL review this data for appropriate content. Information provided should be informational in nature, and speak to the question.

Figure 39 displays the **Suggestions** screen. You may respond to some or all of these questions in order to provide feedback regarding the various aspects of the SmartWay Program. SmartWay values your feedback. Any information you provide will be used to improve the program, and will be kept confidential. Use the scroll bar to the right to display additional questions.

SmartWay Additional Information: Mountain Rail, Inc.

Partner Information | **Suggestions**

OPTIONAL SMARTWAY SATISFACTION AND FEEDBACK SURVEY

We are always trying to improve the SmartWay program and provide better service to our partners. By filling out this optional survey, you can help us improve the program. Thank you.

Partner Name: Mountain Rail, Inc.

Please answer Yes or No

	Yes	No
Do you read the Tool User Guides?	<input type="radio"/>	<input type="radio"/>
Do you read the Tool Technical Documentation?	<input type="radio"/>	<input type="radio"/>
Do you regularly visit the SmartWay website?	<input type="radio"/>	<input type="radio"/>

On a scale of 1 to 10, 10 being the best:

How do you rate the SmartWay Tool?	<input type="text"/>
How do you rate the SmartWay User Guide?	<input type="text"/>
How do you rate the SmartWay Technical Document?	<input type="text"/>
How do you rate the SmartWay Website?	<input type="text"/>
How do you rate SmartWay support materials?	<input type="text"/>


On a scale of 1 to 10, 10 meaning strongly agree:

I understand the goals of the SmartWay program	<input type="text"/>
I understand how to participate in the program	<input type="text"/>
I understand and know how to find information on the SmartWay website	<input type="text"/>
I understand this SmartWay Tool	<input type="text"/>
I understand the SmartWay emission factor ranking system	<input type="text"/>
I understand the SmartWay Partnership logo guidelines	<input type="text"/>

BACK | **ZOOM IN** | **PRINT SCREEN** | **HOME** | **SAVE** | **ADD COMMENTS** | **HELP**

Page R-21

Figure 39. Suggestions Screen

Once you have completed these three screens, select the  button to return to the **Home** screen.

Viewing Reports

Once you are ready to continue, select [View Your Data Reports](#) from the [Home](#) screen which will take you to the following screen:

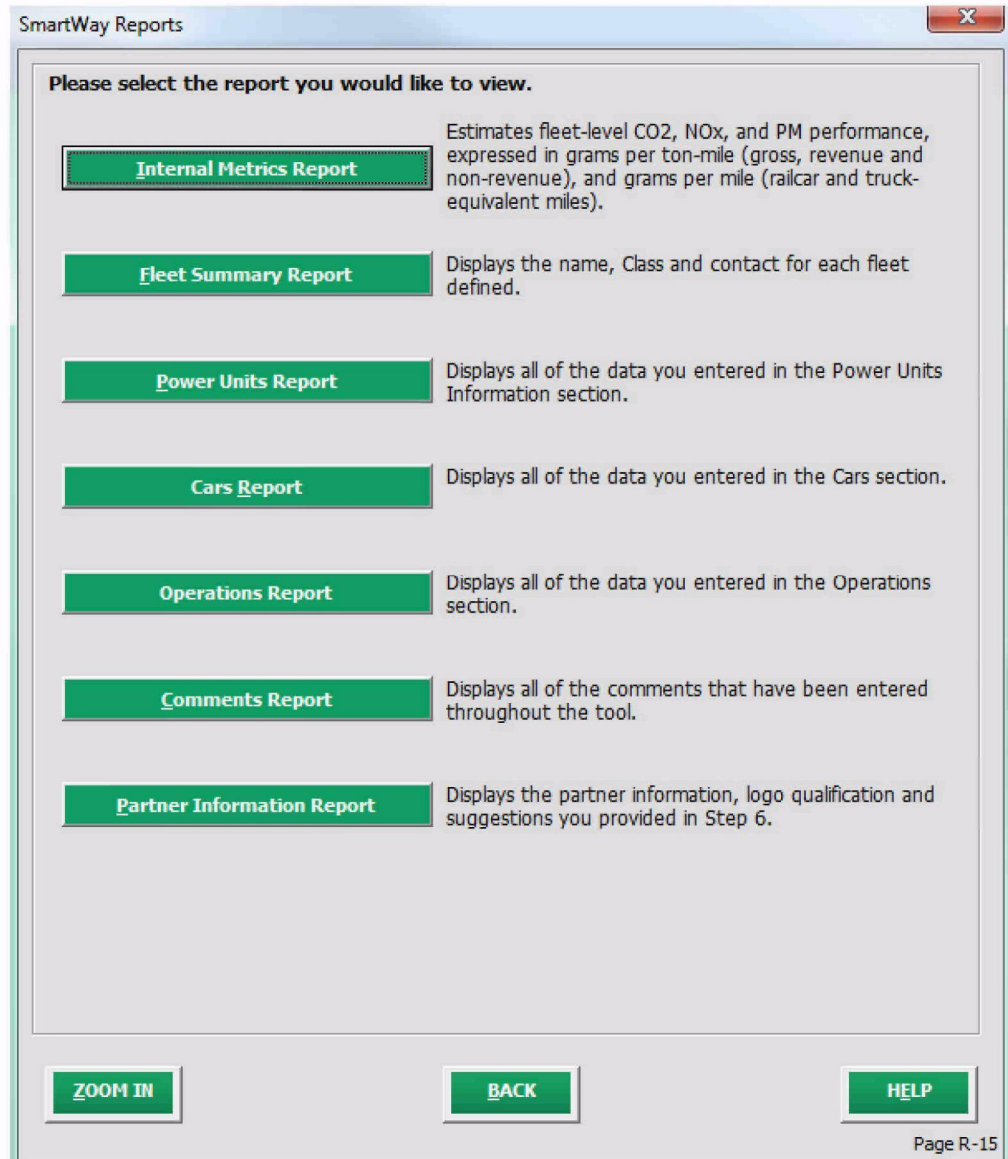


Figure 40. View Fleet Reports Screen

Selecting any of the green buttons on this screen will display the indicated data. Several reports summarize the data you entered on specific data input screens, such as the **Power Units, Cars, and Operations Reports**.



NOTE: The **Comments Report** allows you to review any notes and comments made during the compilation of the different data inputs throughout the Tool. These comments can provide a useful reference for documenting data sources and assumptions, as well as for preparation of subsequent year submittals. In addition, you can use this report to view questions and comments from your Partner Account Manager after they receive and return your Tool.

Select the **Internal Metrics Report** button to review the performance of your fleet(s) in terms of grams per ton-mile (gross, revenue and non-revenue), and grams per mile (railcar-mile and truck-equivalent mile), by pollutant type.

If you have defined multiple fleets, a drop-down box will appear allowing you to select the desired fleet for some report types (see **Figure 41** below).

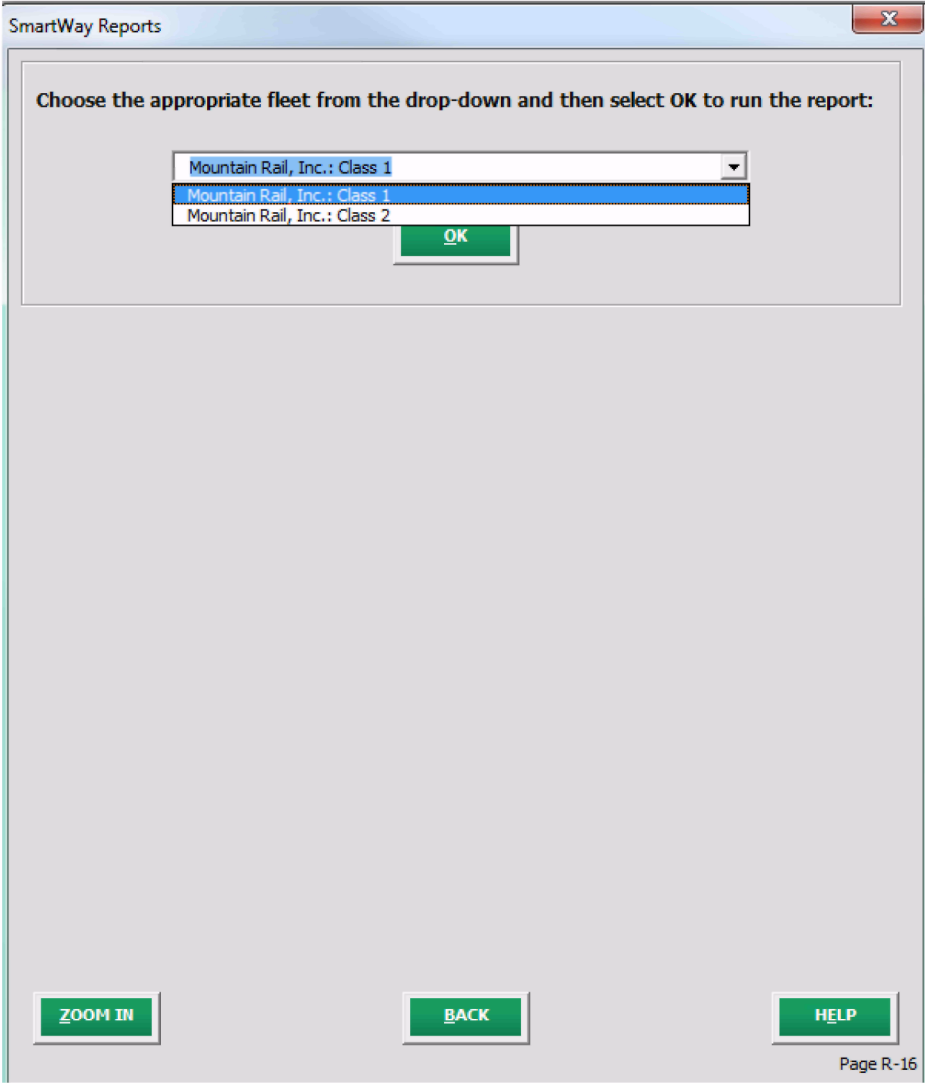


Figure 41. Fleet Selection Screen – Reports Menu

Submitting Data to SmartWay

Congratulations! You are now ready to send your data to EPA.

Select the **Generate a (.xml) data file** button, which will open the following screen.

Create submission file for EPA

SmartWay® **Data Year 2015** OMB 2060-0663 Expiration Date 07/31/2017 (Revised 2014) **Rail** United States Version: 2.0.15 Released on: 2/3/2016

By checking the box below, I declare that the information submitted via this Tool is, to the best of my knowledge, accurate. I understand that any person who, in the course of negotiating or performing under this Agreement, makes, presents or submits a false or misleading statement to the government, or any person who makes a material omission in the course of negotiating or performing under this Agreement, may be subject to liability under all applicable civil and criminal statutes including 18 U.S.C. 1001 (criminal liability for false statements), 31 U.S.C. 3801 - 3812 (civil liability for false statements) and 31 U.S.C. 3729-33 (The False Claims Act).

I understand and agree to the terms of this agreement.

ZOOM IN CANCEL PRINT SCREEN


Page R-22

Figure 42. Creating Submission File for EPA

Select the checkbox to indicate you understand the terms of the SmartWay Partnership Agreement once again. Next, a question will appear asking if you are an existing SmartWay Partner (Y/N). If you are, a question will appear asking for your Annual Submission ID, which has been sent to you by your SmartWay PAM via email. If you cannot locate your submission ID you can select the **Email me my SmartWay ID** button to have your ID sent to you. Submission of the SmartWay ID is optional.

If you are not an existing SmartWay Partner you will be asked how your company initially heard about SmartWay, and possibly some follow-on questions (see **Figure 43** below).

Create submission file for EPA



**Data Year
2015**

OMB 2060-0663
Expiration Date 07/31/2017
(Revised 2014)

Rail

United States Version: 2.0.15
Released on: 2/3/2016

By checking the box below, I declare that the information submitted via this Tool is, to the best of my knowledge, accurate. I understand that any person who, in the course of negotiating or performing under this Agreement, makes, presents or submits a false or misleading statement to the government, or any person who makes a material omission in the course of negotiating or performing under this Agreement, may be subject to liability under all applicable civil and criminal statutes including 18 U.S.C. 1001 (criminal liability for false statements), 31 U.S.C. 3801 - 3812 (civil liability for false statements) and 31 U.S.C. 3729-33 (The False Claims Act).

I understand and agree to the terms of this agreement.

Please answer the question that appears below. Depending on your answer(s), additional questions may appear that also requires an answer. Your answers will allow EPA to better process your submission.

Are you an existing Partner in SmartWay? Yes No

How did your company initially hear about SmartWay? Other (please describe)

Company 1, Company 2, ...

You are now ready to create your .xml file. The tool will also automatically save your .xml file and .xls file at: C:\Users\DPreusse\Documents\EPA SmartWay\RAIL\20160112 unless you designate another location. Please select the NEXT button below to continue.

ZOOM IN
NEXT
CANCEL
PRINT SCREEN

Page R-22

Figure 43. Completed Submission File Screen

When ready, select NEXT to create a file with the following naming convention:

Rail_PartnerName_Year_V0.xml¹

For example, Rail_Mountain Rail, Inc__2015_V0.xml

where **PartnerName** is your company's name as entered for Step 1 on the **Home** screen, and **Year** indicates the year for which you are submitting your data.

Next specify the folder where you would like to save the xml file, and the following screen will appear.

¹ If you create the XML file multiple times the file name will increment each time (e.g., Rail_Mountain Rail, Inc__2015_V1.XML for the second iteration, etc.

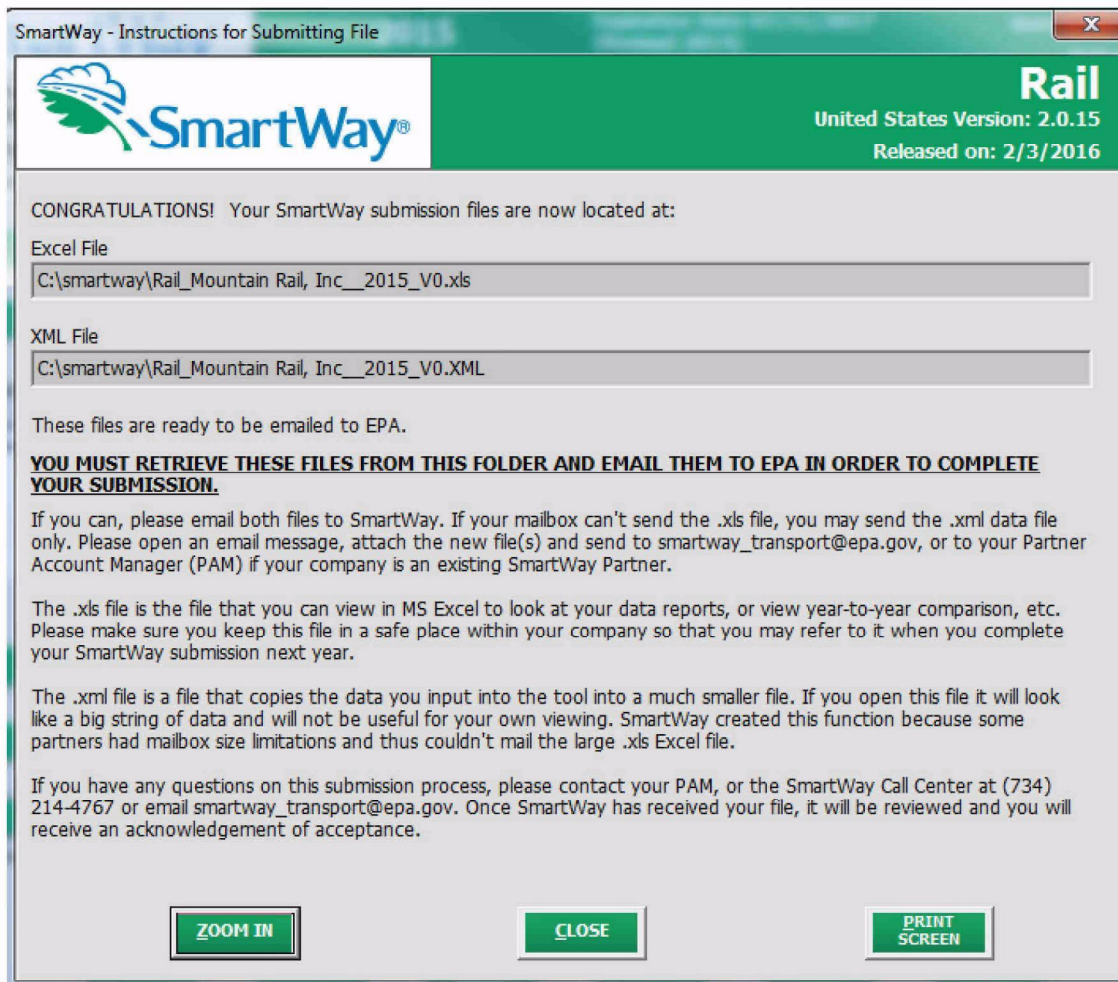


Figure 44. Instructions for Submitting xml File to EPA

Follow these instructions for submitting your xml and xls files to SmartWay. Note that the xml file is approximately 10 times smaller than the xls files the Tool generated in the past. Upon selecting

CLOSE

, a screen will appear that allows you to close the Rail Tool or return to the [Home](#) screen.

NOTE: DO NOT ZIP the File. Send it to EPA as a normal file attached in an e-mail. EPA security will not allow zipped files through the EPA firewall.

NOTE: DO NOT CHANGE THE NAME OF THE XML OR XLSX FILES.

NOTE: DO NOT DELETE YOUR EXCEL (XLSX) TOOL – SAVE THIS FILE FOR YOUR REFERENCE.

Troubleshooting the Tool

Although the SmartWay Tools have been tested extensively, you may encounter errors. Intermittent errors have been encountered when opening the Tool directly from the SmartWay website, or from an e-mail, rather than from a drive, or when multiple Excel files or other applications are open simultaneously. If you encounter an error during use of the Tool, please try restarting the Tool directly from a disk drive, with all other Excel files and applications closed. In addition, make sure that your computer is using a system and application version validated for use with the SmartWay Tools (Windows XP or later operating system, and Excel 2003 or later version).

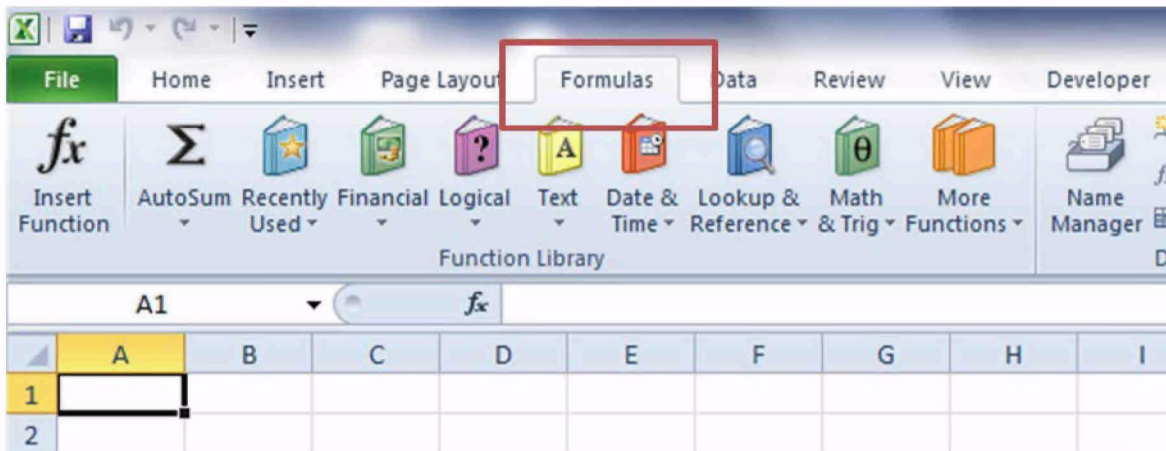
If you continue to encounter problems, please make a screen capture of the error message, and save the Tool at that point. (You can make a screen capture by pressing *Alt-Print Screen*, and then pasting the image into a document such as MS Word.) Then send the screenshot, along with the saved Tool to your Partner Account Manager for further assistance.

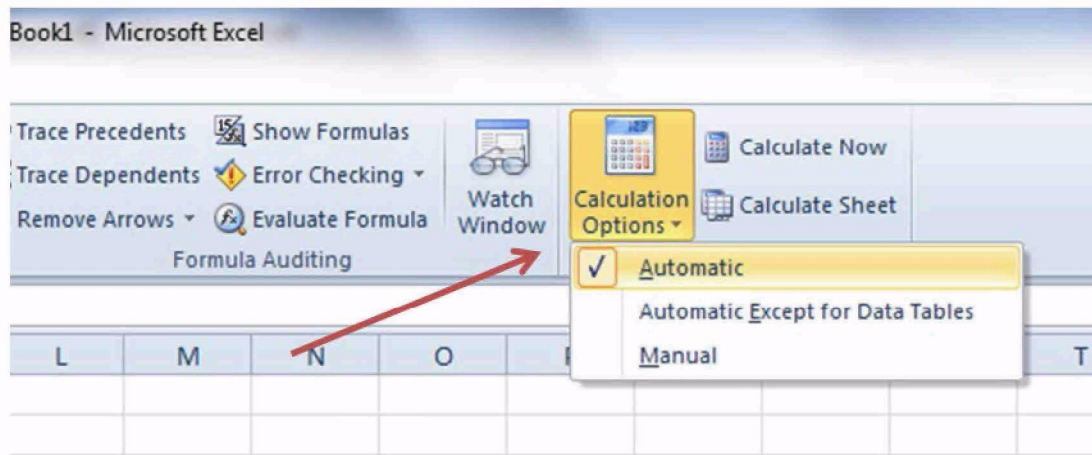
Proper Calculation Setting

By default, Microsoft Excel is set to automatically calculate formulas. If values within your Tool are not calculating automatically, then your Excel may be set to “Manual”. Follow these instructions to change your Excel Calculation setting.

Office 2010

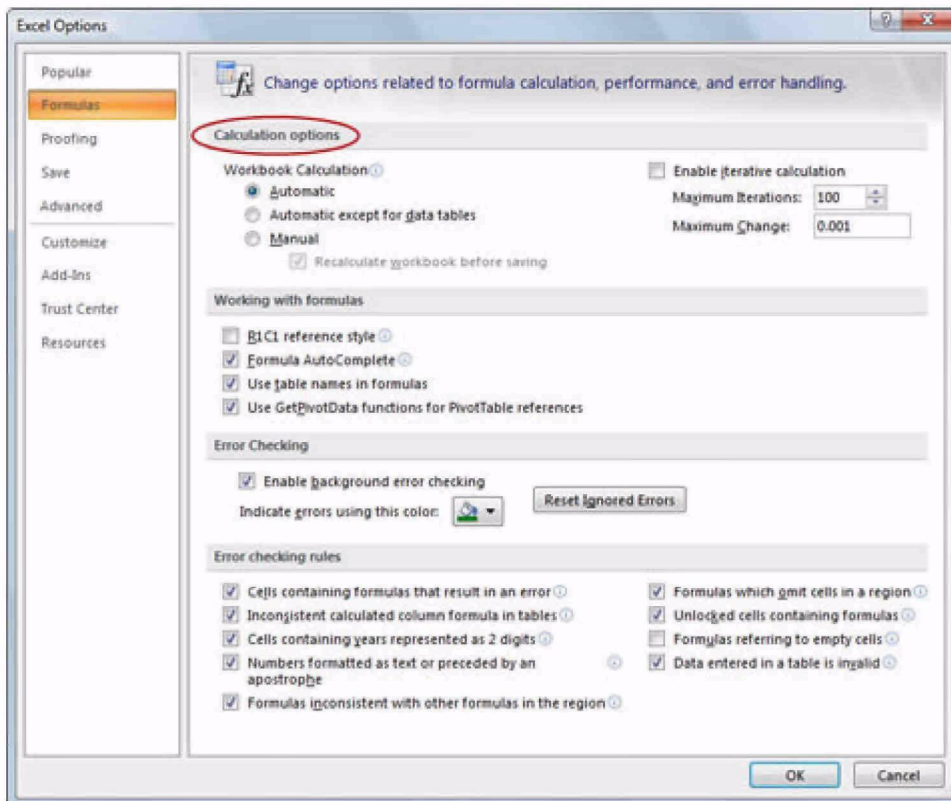
Choose the “Formulas” tab. Select the “Calculation Options” button in the “Calculation” section to view the drop-down list of options. Choose “Automatic” from the list of options to switch to automatic calculation.





Office 2007

Select the Office button at the top left. Then select the Excel Options button and the Excel Options dialog box will appear. Select the Formulas tab and the Formulas options will appear in the right pane. Select the “Automatic” radio button in the Calculation options section.



Office 2003

From the tools menu, select “Options”. When the Options dialog box is displayed, select the “Calculation” tab. Under the Calculation section, select the “Automatic” radio button and then select “OK”.

