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<tr>
<th>VERSION</th>
<th>DATE</th>
<th>EDITOR</th>
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<tr>
<td>1/10/2017</td>
<td>J. Locklear</td>
<td></td>
<td>Initial Draft Document</td>
</tr>
<tr>
<td>5/2/2017</td>
<td>J. Locklear, M. Banick</td>
<td></td>
<td>Final Draft Document</td>
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<td>10/1/2018</td>
<td>J. Vernick</td>
<td></td>
<td>Refine and Finalize Draft Document</td>
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</table>
INTRODUCTION

Welcome To PRIME

Each year the NJTPA, its subregions and partner agencies conduct studies focused on a variety of transportation issues. Many relate to the NJTPA Regional Transportation Plan and other agency policies and programs. As this body of research continues to grow, maintaining access to study findings and relating them to each other is an enormous challenge.

The Planning Recommendations Integration Management Engine (PRIME), is a searchable online database designed to make locating and analyzing study findings efficient and interactive.

PRIME provides the capability to organize, track, map and relate the following **three types of planning result records** identified by the NJTPA, subregions and partner agencies:

- **Source**: A record describing the study, outreach or policy product that contains planning findings (i.e., Needs and Recommendations).
- **Need**: A problem, issue, challenge or opportunity finding identified in a Source that describes the performance of the transportation system, a facility or a location.
- **Recommendation**: A strategy, solution, method or approach finding identified in the Source that addresses one or more Needs.
PRIME

Additional features of PRIME include an interactive map highlighting geographic locations of studies and a data analysis feature that allows you to make connections among findings from different studies.

By correlating planning findings across many agencies, PRIME informs the NJTPA’s systematic performance-based planning process, supports improved inter-agency planning coordination and encourages multi-modal approaches to solutions.

About This User Guide

This User Guide provides procedures to access and use the PRIME application. Each section includes step-by-step instructions and illustrations that walk you through the various features and functions of the application.

Further information about PRIME including Introduction and How-To Videos, a Quick Start Guide, FAQs and a Glossary of PRIME terminology are available under the PRIME Support menu.
User Access Levels Overview

PRIME has four built-in User Access Levels that control and govern user access to the various tools and features within the application.

Registered Users
The Registered User level provides full access to search and analytical tools, including printing, exporting results and saved search features.

Publisher
The Publisher level provides Registered User level access plus the ability to enter, connect and update records for their agency. These records may only be seen by other internal users within their agency.

Agency / Subregion Administrator
The Agency / Subregion Administrator level provides Publisher level access, the ability to manage their agency’s user accounts and the authority to review / approve their agency’s internal records for viewing by all PRIME users.

System Administrator
The System Administrator level provides Agency / Subregion Administrator level access, the ability to manage all user access levels, agency groups, project types, categories, notifications, records and system notifications, and final authority on review / approval of records advanced from Agency / Subregion Administrator level for viewing by all PRIME users.

For guidance on selecting an appropriate account, see PRIME FAQs.

System Access
To use PRIME, you must first submit an access request and create an account with login credentials. Once your request is submitted, it is reviewed by a System or Agency / Subregion Administrator who will then review and either approve or deny your request.
Notification updates on the status of your request are sent via email throughout the approval process to the email address you provided. Once approved, you’ll be able to login and access PRIME using your username and password credentials.

Submit an Access Request

1.) Click the **Request Access** button located on PRIME’s home screen.

2.) Select your **Agency** and **Group** (if applicable) from the dropdowns then enter your **Name**, **Phone Number**, **Email**, **Username** and desired **Password**

   *Password must meet complexity requirements and contain a minimum of 6 characters, at least one digit and at least one alphanumeric character.*

3.) Indicate which access level you’d like to request by selecting one of the following: **Registered User**, **Publisher** or **Agency / Subregion Administrator** then click **Continue** to submit your request.
Setting Your System to Accept PRIME E-Mails

PRIME issues system-generated e-mails during the new user signup process and the user account password reset process. The following steps are required to ensure that e-mails from PRIME will be received in your e-mail inbox and avoid being mislabeled as spam. The following instructions apply to adjusting settings for the Outlook 2013 desktop client.*

1.) On the top ribbon, under ‘Home’ click the Junk dropdown icon and from the dropdown menu, and select Junk E-mail options.
2.) The Junk E-mail Options window will appear. Click on the Safe Senders tab, and click the Add button on the right.

3.) Add no-reply@njtpa.org to add PRIME to Outlook’s safe sender list. Click OK.
4.) Back in the Safe Senders tab, click **Apply**, and then click **OK** to commit your Junk settings update.

*NOTE: The instructions above apply only to Outlook 2013. Users with other e-mail clients should consult their IT department on “white-listing” PRIME.*

**Introduction Video**

The first time you log into PRIME, you’re presented with an Introduction Video that provides an overview of PRIME. After viewing the video, you can click **Don’t show this again**. Otherwise, the Introduction Video will display each time you log into PRIME. You can also access this video under the Support drop-down menu in the PRIME Main Navigation bar at any time.

**How-To Videos**

Several “How-To” videos are available to explain PRIME features. These include the Welcome to PRIME, Using PRIME Search, Entering PRIME Text Records, Mapping PRIME Records and Managing and Using PRIME Search Results. These are available under the Support drop-down menu in the PRIME Main Navigation bar.

**User Dashboards**

Once you have successfully logged in to PRIME, you will arrive at **My Dashboard**, a multi-faceted home screen that allows you access all of PRIME tools and features*, quickly find records that you have entered, call up frequently used search commands and view scoping reports that you have generated and saved.

PRIME will automatically log-out user accounts following 60 minutes of inactivity.
*NOTE; The visibility and availability of dashboard tools and features is dependent upon your account Access Level. See User Access Levels Overview as well as the descriptions below.

Main Navigation Bar

1.) **My Dashboard:** [All User Access Levels] Returns you to your dashboard from any screen in the application.
2.) **My Account:** [All User Access Levels] Links to your account information page.
3.) **Logout:** [All User Access Levels] Signs you out of the application.
4.) **System Notifications:** [Administrators Only] Shows number of user access requests and reports awaiting review.

5.) **Support:** [All User Access Levels] Provides links for requesting support, training, and other support features.
6.) **Administration:** [Administrators Only] Provides links to user, system and records management tools.

Main Tools and Map

7.) **Analysis Tools:** [All User Access Levels] Tools for search and management* of needs, recommendations and sources. *Dependent on user access level.
8.) **Map**: [All User Access Levels] Map interface for viewing and management* of needs, recommendations and sources. *Dependent on user access level.

9.) **Interactive Map Tools**: [All User Access Levels] Toolset that allows you to adjust map layer visibility, pan and zoom the map and identify sources, needs and recommendations.

10.) **Results Panel**: [All User Access Levels] Display of search results.

**System Refresh Methods**

PRIME commands offer differing levels of map, filter and system refresh capabilities. The following list some of the primary ways that users can clear results or refresh system selections.

<table>
<thead>
<tr>
<th>Command Sequence</th>
<th>Result</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>-&gt;My Account -&gt; Cancel</td>
<td>Complete refresh</td>
<td>Complete return to log-in state</td>
</tr>
<tr>
<td>-&gt;My Dashboard; -&gt;PRIME Logo</td>
<td>Clears results table and map results; returns map view to that selected for Search on Map/Manual Search</td>
<td>Partial refresh supports similar repetitive searches</td>
</tr>
<tr>
<td>Clear Results Button</td>
<td>Clears Results Table and map results</td>
<td>Partial refresh supports similar repetitive searches</td>
</tr>
<tr>
<td>Clear Filters</td>
<td>Clears all selected filters</td>
<td>Click ‘x’ on individual filters to remove</td>
</tr>
</tbody>
</table>

**My Account**

My Account provides access to your account details and is accessible from the top main menu. Account details include: your username, agency, user group and contact info. From here, you can update your contact information, change your password and request additional access to PRIME.
Update Your Contact Info

To update your contact info:

1. Click **My Account** to open your account details.
2. Make desired edits to your **First Name**, **Last Name**, **Phone Number** or **Email** then click **Save** to save your edits.

3.) Click **Cancel** to cancel and return to My Dashboard.

*NOTE: Once your account is created you will not be able to make changes to your username.*

Change Your Password

To change your password:

1. Click **My Account** to open your account details.
2. Click the **Change Password** link to open the change password form.
3. **Current Password**: Enter your current password.
4. **New Password**: Enter a new password.*
5. **Confirm Password**: Enter the new password again.
6. Click **Submit** to submit the request.
7. Click **Cancel** to cancel and return to My Account

*NOTE: New Password requires minimum of 6 characters with at least one digit and one non-alphanumeric character.

**Request Additional Access to PRIME**

To request additional access:

1. Click **My Account** to open your account details.
2. Click the **Request Additional Access to PRIME** link to open to access request form.
PRIME

3. Click the access level you’d like to request.

- Registered User
  Full access to search and analytical tools, including printing, exporting results and saved search features
- Publisher
  Registered User access plus ability to enter, connect, update and archive data. Ability to share draft needs, recommendation and study records privately
- Agency / Sub-Region Administrator
  Publisher access plus ability to review, update and manage all subordinate agency user access. Ability to generate dynamic real time data summaries and send alerts to subordinate agency users.

4. Click **Continue** to submit the request. You’ll receive confirmation that the request was sent.

   Thank you for submitting an access request!
   Your request for access will be reviewed and you will receive an email at the address you specified. You may continue to use the PRIME site until you receive notice that your account request has been approved.

   **<< Return to Dashboard**

5. Click **Return to Dashboard** to return to My Dashboard.
6. Or, click **Cancel** from the access request form to return to My Account.

**Password Reset**

From the login screen, you have the option to reset your password if you happen to forget it.
To use:

1. Click the **Forgot Password?** Link.
2. Provide the **Username** used to open your account.
3. Click **Reset Password** to submit the request. You’ll receive a confirmation email.

*NOTE: You also have the option to reset your password from your account details. See the [My Account](#) section for instructions.*
DATA ANALYSIS TOOLS

PRIME record analysis tools provide the ability to search for sources, needs and recommendations. You can save your searches for future use as well as create and save reports. Additionally, if you have a Publisher user Account Level or higher, you can also relate and connect needs and recommendations across different study sources.

Interactive Map Tools

The map tools allow you to configure the map display, pan and zoom selected map areas and identify map features. Tools include:

- **Basemap Selection** – Allows you to choose from a selection of basemap displays.
- **Map Layer Visibility** – Turns display of map feature layers off and on.*
- **Re-center Map** – Re-centers and focuses the map to its default scale and location.
- **Zoom In** – Provides the ability to zoom into a selected area on the map.
- **Zoom Out** – Provides the ability to zoom out of a selected area on the map.
- **Pan** – Turns off selection mode allowing you to drag and pan the map.
- **Identify** – Allows you to click anywhere on the map and identify map features.

*NOTE: The Map Layer Visibility box also serves as the key to map features.*
The Search & Connect tools provide the ability to search for sources, needs and recommendations manually by specific attributes as well as by interactive map. Guidance on adjusting and optimizing map and tabular display settings, selecting Manual Search vs. Search on Map methods and connecting records can be found in the PRIME FAQ document.

**Manual Search**

Manual Search allows you to drill down into locations and facilities manually using a hierarchal filter approach as well as search using keywords. This type of search works well when the exact map location is not known, but you know some information such as the facility type or agency for example.

The search filters can be used individually or in conjunction with each other to build a truly custom search. Filters include:

- **Location** – filters by municipality or county
- **Facility** – filters by facility type including (rail stations, roads, etc.)
- **PRIME ID** – filters by record identification number
- **Keyword** – filters by keyword
- **More Filters** – filters by source type, agency and more

Follow the steps below to conduct a Manual Search.

1.) Start by clicking **Search & Connect** in the **Main** analysis tools.
PRIME

2.) Select **Planning Source**, **Needs** or **Recommendations** from the I’m looking for... dropdown.

![I'm looking for...](image)

3.) Ensure the **Manual Search** radio is selected.

![Manual Search](image)

Next, use the filters to build your Manual Search. Instructions for using each filter type are provided below.

**Location Filter**

The location filter search options include by:

- Counties
- Municipalities
- Legislative Districts (State)
- MPO Boundaries

Steps:

1.) If collapsed, click **Location** to expand the Location filter.
2.) **Search by:** Select **Municipalities** or **Counties** from the Search by dropdown to filter available features.

3.) **Select Feature:** Select the desired municipality or county from the dropdown.

4.) Click **Add to Filter** to add the selections to the search.

5.) Next, click **Search** to run the query and return a list of results or add more filters.

### Facility Filter

The facility filter options include:

- Light Rail Stations
- NJ Transit Rail Stations
- Railroad Lines
- Ferry Lines
- Roads

**Steps:**

1.) If collapsed, click **Facility** to expand the Facility filter.
NOTE: Roads has different filter options. Advance to step 6: additional steps below.

2.) **Search by**: Select one of the options listed above from the Search by dropdown to filter the available features.

3.) **Select Feature**: Select the desired feature from the dropdown.

4.) Click **Add to Filter** to add the selections to the search.

5.) Next, click **Search** to run the query and return a list of results or continue to add more filters.

Additional Roads Filter Steps:
6.) **County**: Select a **County** from the dropdown.
7.) **Municipality**: Select a **Municipality** from the dropdown.
8.) **Route Type**: Select **Route Type** from the dropdown.
9.) **Route Number**: Select **Route Number** from the dropdown.
10.) **Road Name**: Select **Road Name** from the dropdown.
11.) **From MP**: Select the **From Mile Point** from the dropdown.
12.) **To MP**: Select the **To Mile Point** from the dropdown.
13.) Click **Add to Filter** to add the selections to the search.
14.) Next, click **Search** to run the query and return a list of results or continue adding more filters.

**NOTE**: For roadways with separate directional travel lanes (e.g., a divided highway or interstate highway), you will be asked to specify **Route Direction** following item 10.) above. From the drop down menu Select the S or W entry for Southbound or Westbound MPs; select the blank choice for the opposite direction (i.e., Northbound or Eastbound) MPs.

**PRIME ID Filter**

The PRIME ID filter searches for specific PRIME record identification numbers.
PRIME automatically assigns an alphanumeric PRIME ID to each Source, Need and Recommendation record at the time of entry to the system. These IDs are visible when a record is opened in the Details window view or in the PRIME Report and Scoping Report results tables. Source IDs begin with an “S” (Source) followed by 3 (or more) numeric digits. Because Need and Recommendation records belong to a specific Source, their IDs begin with the Source ID followed by “N” (Need) or “R” (Recommendation and 3 (or more) numeric digits.

<table>
<thead>
<tr>
<th>Record Type</th>
<th>PRIME ID Protocol</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>Sxxx</td>
<td>S254</td>
</tr>
<tr>
<td>Need</td>
<td>SxxxNxxx</td>
<td>S254N356</td>
</tr>
<tr>
<td>Recommendation</td>
<td>SxxxRxxx</td>
<td>S254R426</td>
</tr>
</tbody>
</table>

Steps:
1.) If collapsed, click PRIME ID to expand the PRIME ID filter.
2.) Enter a PRIME ID into the PRIME ID field.

Keywords Filter

The Keywords filter searches the following record fields for potential matches:

<table>
<thead>
<tr>
<th>Selected Record Type for Search</th>
<th>Record Fields Searched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>• Study / Policy / Event Title</td>
</tr>
<tr>
<td></td>
<td>• Study / Policy / Event Description</td>
</tr>
<tr>
<td>Need</td>
<td>• Need Title</td>
</tr>
<tr>
<td></td>
<td>• Need Summary</td>
</tr>
<tr>
<td></td>
<td>• Need Tag Type</td>
</tr>
<tr>
<td></td>
<td>• Need Tag</td>
</tr>
</tbody>
</table>
Recommendation | Recommendation Title  
|----------------|----------------------| 
|                 | Recommendation Summary  
|                 | Recommendation Tag Type  
|                 | Recommendation Tag  

Steps:

3.) If collapsed, click **Keywords** to expand the Keywords filter.
4.) Enter a keyword into the Keywords field.

![Keywords Filter](image)

5.) Next, click **Add to Filter** to add the selection to the search.

![Add to Filter](image)

6.) Next, click **Search** to run the query and return a list of results or continue adding more filters.

**NOTE:** More Filters selections when searching for a planning source versus a need or recommendation vary slightly. Therefore, each is discussed separately below.

**More Filters: Planning Sources**

More Filters offers specific search criteria for planning Sources that include:

- Planning Study
- Policy
- Outreach Event

Planning Topics include:

- Transportation
Steps for using More Filters with a planning source:

1.) Select **Planning Source** from the I’m looking for... dropdown and ensure that **Manual Search** is selected.

![I’m looking for...](image)

2.) If collapsed, click **More Filters** to expand the More Filters.

![More Filters](image)

3.) **Document Type**: Select **Planning Study**, **Policy** or **Outreach Event** from the dropdown.

4.) **Agency**: Select an agency from the dropdown.

5.) **Study Date**: This represents a date range you wish to search.
   a. **Start Date**: Starting date for the range.
   b. **End Date**: Ending date for the range.

6.) **Planning Topic**: Select **Transportation**, **Land Use** or **Environment** from the dropdown.
7.) Next, click **Add to Filter** to add the selections to the search.

8.) Next, click **Search** to run the query and return a list of results or continue adding more filters.

**More Filters: Needs or Recommendations**

More Filters for Needs and Recommendations allows you to filter results by Agency, Planning Topic, and Mode, and drill down by Need Type or Recommendation Type. More Filters allows you to use one or multiple filters at once. See table below for options. See Appendix A for a full list of drop-down selections for these filters.

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Need / Recommendation</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Both</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Planning Topic</td>
<td>Both</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Tag Type</td>
<td>Both*</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Tag</td>
<td>Both*</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Need Type</td>
<td>Need</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Recommendation Type**</td>
<td>Recommendation</td>
<td>Drop-down</td>
</tr>
<tr>
<td>Action**</td>
<td>Recommendation</td>
<td>Drop-down</td>
</tr>
</tbody>
</table>

* Although Needs and Recommendations both use Tag Types and Tags, drop-down selection lists for each are different. A Tag Type and Tag must be selected together in order to Add Filter.

** A Recommendation Type and Action must be selected together in order to Add Filter.

Steps for using More Filters with a Need or Recommendation:

1.) Select Needs or Recommendations from the I’m looking for... dropdown and ensure that Manual Search is selected.
2.) If collapsed, click **More Filters** to expand the More Filters.

For Both Need and Recommendation Records:

3.) **Agency**: Select an agency from the dropdown.
4.) **Planning Topic**: Select a topic from the dropdown.
5.) **Tag Type**: Select a descriptor category from the dropdown.*
6.) **Tag**: Select a descriptor term from the dropdown.*

*Must be selected together in order to Add Filter.*

For Need Records:
7.) **Need Type [Need]**: Select one of the options from the dropdown list.

For Recommendation Records:

![More Filters](image1)

8.) **Action Type**: Select one of the options from the dropdown list.*

9.) **Action**: Select one of the options from the dropdown list.*

   * Must be selected together in order to Add Filter.

For Both Need and Recommendation Records:

10.) Next, click **Add to Filter** to add the selections to the search.

![Search Filters](image2)

11.) Next, click **Search** to run the query and return a list of results or continue adding more filters.
Search on the Map

The Search on Map tool provides a way to search for planning sources, needs and recommendations directly on the map using map selection tools.

Available Selection Tools and Usage:

- **Pointer**: Will search a selected point on the map. Best for querying a specific map feature.
  - **Usage**: Click a location on the map to perform query.
- **Circle Select**: Will search a circular area on the map.
  - **Usage**: Click and drag mouse to draw circular area on the map to search.
- **Polygon Select**: Will search a precise polygon area on the map.
  - **Usage**: Use a series of single mouse clicks on the map to define a completely bounded search area then double-click to perform the query.

Steps:

1.) Start by clicking **Search & Connect** in the **Main** analysis tools.
2.) Select **Planning Source**, **Needs** or **Recommendations** from the **I’m looking for...** dropdown.

![I’m looking for... dropdown](image)

3.) Ensure the **Search on Map** radio is selected, then select **Point**, **Circle** or **Polygon**.

![Search on Map radio](image)

4.) Next, based on selection tool, click or click and drag mouse on the map to select the desired area to search.

![Map selection tool](image)
5.) The selected area is then queried and the search results are highlighted on the map and populated in the Results.

Viewing Search Results

Search results records are returned in the Results table and illustrated on the map screen. In order to view the full range of records returned on the map, the map scale will re-adjust to show the largest geographic feature of any record returned. Where PRIME map views appear stacked or cluttered, users may want to adjust layer settings, use zoom to focus in closer on an area and make use of the tabular records and detail windows to interpret results. The PRIME FAQs document provides additional guidance on using map and tabular results together.
In the Results table, click on any header to sort results by that criteria. Move your mouse across each record to enlarge it to show the full narrative and light up the geography on the map view. Use the scroll bar at the right of the table to access records down in longer results lists.

At the right of each Source, Need and Recommendation record are several record-specific command options. The table below illustrates commands that are available given the type of record, record ownership status and PRIME Account Access level of the user.

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
<th>Type(s) of Record</th>
<th>Record Ownership</th>
<th>Account Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoom</td>
<td>Adjusts map scale and view to display the geographic area for that record</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>Details</td>
<td>Opens window displaying full information for that record</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>Connect</td>
<td>Set connections between Recommendation and/or Need records</td>
<td>Needs and Recommendations Only</td>
<td>All</td>
<td>Publisher and above</td>
</tr>
</tbody>
</table>

---

Page 29 | Data Analysis Tools - Search & Connect
Zoom to result:

1.) Click the **Zoom** link next to the feature to highlight it and zoom into it on the map.

View **Details** of a result and **Download Documents**:

1.) Click the **Details** link to bring up details about the selected result.
2.) Further command options are available within the Details window.
   
a. Click **View Connections** to bring up connected records in the Results screen below the map.

b. Click **Download Documents** to download attachments associated with the record.

c. Click **Edit Recommendation** to access the record, if from your agency, in editing mode.

*NOTE: Where button(s) a. – c. appear faded, this selection is not available for that record.*
Connecting Needs and Recommendations

If you have Publisher or higher level credentials, you have the additional option to connect a need or recommendation to another need or recommendation from the same or different Source. Use of the Connection feature is intended to highlight highly inter-dependent or strongly related Need issues and/or Recommendation solutions.

Additional records may also be connected to these records. This will allow users to “pivot” between a series of connected records that have been identified as strongly or integrally related. The following options are available for connecting records.

<table>
<thead>
<tr>
<th>Record 1 Type</th>
<th>Record 2 Type</th>
<th>Purpose of Connection</th>
<th>Planning Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need</td>
<td>Need</td>
<td>Identify inter-dependent or strongly correlated needs issues that should be considered or addressed in context with each other.</td>
<td>Same or Different</td>
</tr>
<tr>
<td>Need</td>
<td>Recommendation</td>
<td>Identify one or more Recommendation(s) that are capable of / intended to address a specific Need issue.</td>
<td>Same or Different</td>
</tr>
<tr>
<td>Recommendation</td>
<td>Recommendation</td>
<td>Identify a Recommendation that is integral to or strongly connected with selecting or implementing other Recommendation(s).</td>
<td>Same or Different</td>
</tr>
</tbody>
</table>

NOTE: Where possible, users should limit the number of connections between records to ensure that only the most important or inter-dependent relationships are highlighted.

Steps to connect:

1.) Click **Connect** to select the first item you wish to connect.
2.) This will open a popup for the select item.
3.) Next, click **Connect** in the Results table for the next item you wish to connect.  

*NOTE: You may need to perform multiple searches to access the records you want to connect (e.g., after selecting a Need record from a Need search results list, you would have to perform a Recommendation search to generate a Recommendation results list in order to select a Recommendation record that you want to connect).* 

4.) This will add the selected item to the same popup. You can add as many items as you like by repeating steps 1-3.
5.) If you need to delete a selection, simply click the X in the header at the top left to remove.
6.) Once you’re satisfied with your selections, click **Connect**.
7.) The selected items will now be connected. To view the connection, click **Details** for the item you wish to view.

8.) This will open the details popup for the selected item. Click the **View Connections** option.
9.) All results will load in the **Search Results** table
Saving a Search

The Save Filter tool provides the ability to save a custom search for later use.

**Steps:**

1.) Enter a name for the search in the **Filter Name** field.

2.) Click **Save Filter** to save the filter then click **OK** on the confirmation popup.

    **NOTE:** Following a Search, if you intend to perform certain follow-on functions (i.e., Edit, Add Need or Add Recommendation) to a record in the Search Results window, or select View Connected Records from the Details window for any record, PRIME is unable to return to the original Search Results Window. To access the original search results list again, use the Save Filter command immediately after performing your initial search. You can then re-run the search using Saved Filter to access the same returned results.

Viewing Saved Searches

**Steps:**

1.) From My Dashboard, click the **Saved Searches** tab in the main analysis tools.
2.) All your saved searches will be listed here.

3.) Click **Load** to load the saved search filter. Alternatively, click **Delete** to delete a saved search filter.
4.) Select the **Manual Search Radio Button**. Click **Search** button to complete a Saved Search.

**NOTE:** You can modify or adjust filters loaded through Saved Search. Click the x within individual filters to remove them, add additional filters through the menus provided or click the Clear Filters button to remove all filters.

**Reports**

PRIME reporting tools provide the capability to query PRIME data and create reports. Currently there are two report options available: PRIME Report and Scoping Report

**PRIME Report**

PRIME Report creates graphic and tabular summaries of the number of records by owner and assigned categories for a geographic area such as a county, municipality or a custom area you select and name. The resulting report can be saved via the web browser to your local computer.

There are two search methods for the PRIME Report:
PRIME

- **Manual Search** – create a report using standard geographic features in PRIME
- **Search on Map** – create a report using map by selecting a location on the map

Steps to create a PRIME Report using a **Manual Search**:

1.) Start by clicking **Reports** in the **Main** analysis tools.

2.) Select **PRIME Report** from the **Which type of report would you like to create?** dropdown.

3.) Select either by **Municipalities** or **Counties** in the Search by dropdown.
4.) Next, based on your selection from step 3 - select a county or municipality from the dropdown and click Create Report to run the report.

5.) The PRIME Report will open in a separate browser window. The report will be titled based on the dropdown area selected.

Steps to create a PRIME Report using a Search on Map:
1.) Start by clicking **Reports** in the **Main** analysis tools.

2.) First, name the area you will select for the report in the “Describe General Location” box. Next, choose a selection tool: **Point**, **Circle** or **Polygon**, then click and/or draw the search area on the map to run the report.

   **NOTE:** In order for the area name you entered to appear as a title on the report page, you must enter it before selecting and using the map selection tool.

3.) The PRIME Report will open in a separate browser window.
Saving and Printing PRIME Reports

1.) To save a copy of the report as an HTML file, right-click anywhere on the report and select **Save As**, then choose where you want to save the report.

2.) To save a copy of the report as a PDF, right-click anywhere on the report and select **Print** then select **Save as PDF** as the Destination.
NOTE: Remember to close the browser window containing PRIME Report when finished.
**Scoping Report**

The Scoping Report is a comparison tool that allows you to search and select existing Needs and Recommendations records for inclusion in a report, and to output the results to CSV.

The report can provide a starting point for discussion between agencies when seeking to scope out further study, problem statement or even project concepts for locations. Two search methods are available to create a Scoping Report:

- **Manual Search** – create the report using a hierarchal filter to find locations
- **Search on Map** – create the report using map selection tools to select custom locations from the map

Steps to create a Scoping Report using **Manual Search**:

1.) Start by clicking **Reports** in the **Main** analysis tools.

2.) Select **Scoping Report** from the dropdown to open the report info form (Step 1).
3.) Enter Scoping Report Information that will be incorporated into the title and header of the Scoping Report product. Although a text entry is required for each, these may be as formal or informal as needed for your working purposes:

   a. Enter the type of analysis (e.g., corridor study, pedestrian walkability audit, site review, etc.) proposed in the Study Type field.

   b. Enter a title for your scoping report in the Study Name field. Because all Scoping Report outputs are automatically saved, the name you select will be used to access the report through the My Dashboard Saved Reports Tab.

   c. Enter the main study goal (e.g., Congestion Reduction, Safety Improvement) in the Study Goal field.

   d. Enter a description of the analysis methods proposed in the Study Approach field (e.g., travel demand model, community outreach, etc.).

4.) Select either by Municipalities or Counties.
5.) Next, based on your selection from step 4, select a county or municipality from the dropdown and click **Create Report** to run the report and generate proposed study area outcomes. Advance to step 10.) to view proposed outcomes and continue creating the report.

Steps to create a Scoping Report using **Search on Map**:

6.) Start by clicking **Reports** in the **Main** analysis tools.

7.) Select **Scoping Report** from the dropdown to open the report info form (Step 1).
8.) Enter Scoping Report Information that will be incorporated into the title and header of the Scoping Report product. Although a text entry is required for each, these may be as formal or informal as needed for your working purposes:
   a. Enter the type of analysis (e.g., corridor study, pedestrian walkability audit, site review, etc.) proposed in the **Study Type** field.
   b. Enter a title for your scoping report in the **Study Name** field. Because all Scoping Report outputs are automatically saved, the name you select will be used to access the report through the My Dashboard Saved Reports Tab.
   c. Enter the main study goal (e.g., Congestion Reduction, Safety Improvement) in the **Study Goal** field.
   d. Enter a description of the analysis methods proposed in the **Study Approach** field (e.g., travel demand model, community outreach, etc.).

9.) Select Search on Map. Enter text that describes the custom location. This text will appear in the header of the Scoping report.
10.) Choose a selection tool: **Point**, **Circle** or **Polygon**, then click and/or draw the search area on the map to run the report and generate proposed study area outcomes.

11.) The **Proposed Study Area Outcomes** will open in a separate browser window and will be organized by **Record Type**, **Needs** and **Recommendations**.
12.) Click Add to Report to select and add an outcome to the report. Once selected the text will change to Remove from Report (which you can click to remove an outcome from the report).

<table>
<thead>
<tr>
<th>PRIME ID</th>
<th>Outcome</th>
<th>Agency</th>
<th>Topic</th>
<th>Recommendation Type</th>
<th>Description</th>
<th>Related</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>S274R518</td>
<td>Adaptive Signal Technology at Promenade U.S. 1 Intersection</td>
<td>New Jersey Department of Transportation</td>
<td>Transportation</td>
<td>Road Enhance Intelligent Transportation Operations</td>
<td>Systematic improvement of traffic signal at Promenade / U.S. Route 1 Intersection to improve U.S. Route 1 progression and congestion reduction</td>
<td>Pending</td>
<td>Add to Report</td>
</tr>
</tbody>
</table>

13.) When you’ve completed your selections, click Create Scoping Report to save the report and view your selected outcomes.

Saving, Printing and Exporting Scoping Reports

1.) To Print a Scoping Report, copy and paste text contained in the report to another document and then print out. For best results, click and hold the left mouse button and drag your mouse to highlight all text from the header through the table that you wish to copy for print. Release the left mouse button, move your cursor over highlighted text and click the right mouse button to open a dialogue box. Click the left mouse button on Copy.
2. Open a new blank document in MS Word (or other office software) (recommended page settings: 11” x 17”; landscape orientation)

3. Click the right mouse button to open a dialogue box. Click Paste using left mouse button. Using MS Word, the Scoping Report will be copied in a tabular format that can be edited and formatted. Alternatively, you can click Export to CSV button to download a copy of the outcomes into an MS Excel file.

**Viewing Saved Reports**

Whenever you create a Scoping Report it is saved to your main tools under Saved Reports.

To view a saved report:

1. Start by clicking **Saved Reports** in the **Main** analysis tools.

2. Click **Access** next to the report you wish to view.

3. The report is then loaded in the browser where you have the option to copy it into a MS Word file or Export to CSV (see the **Saving, Printing and Exporting Scoping Reports** section above).
### Scoping Report Outcomes:

**Study Name:** TRAFFIC OPTIONS FOR AN INTERSECTION AT U.S. ROUTE 3 AND PROMENADE BOULEVARD (CP532) IN SOUTH BRANFORD TOWNSHIP IN MIDDLESEX COUNTY  
**Study Goal:** IDENTIFY MULTI-FACET STRATEGIES

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Type</th>
<th>Description</th>
<th>Recommended Type</th>
<th>Rating</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5164102</td>
<td>Traffic Signal Improvement</td>
<td>Improve signal operation on Route 3 at the Promenade Boulevard</td>
<td>Improved Signal Operation</td>
<td>Pending</td>
<td>Drafted</td>
</tr>
<tr>
<td>5164103</td>
<td>Traffic Signal Improvement</td>
<td>Improve signal operation at the Promenade Boulevard</td>
<td>Improved Signal Operation</td>
<td>Pending</td>
<td>Drafted</td>
</tr>
<tr>
<td>5164104</td>
<td>Traffic Signal Improvement</td>
<td>Improve signal operation on Route 3 at the Promenade Boulevard</td>
<td>Improved Signal Operation</td>
<td>Pending</td>
<td>Drafted</td>
</tr>
<tr>
<td>5164105</td>
<td>Traffic Signal Improvement</td>
<td>Improve signal operation at the Promenade Boulevard</td>
<td>Improved Signal Operation</td>
<td>Pending</td>
<td>Drafted</td>
</tr>
</tbody>
</table>

**Recommendations:**
- Improve signal operation on Route 3 at the Promenade Boulevard
- Improve signal operation at the Promenade Boulevard
- Improve signal operation on Route 3 at the Promenade Boulevard
- Improve signal operation at the Promenade Boulevard

**Types of Recommendations:**
- Improved Signal Operation

**Status:**
- Pending
- Drafted

---

**Footer:**

NJTPA  
NORTH JERSEY TRANSPORTATION PLANNING AUTHORITY  
Defining the Vision. Shaping the Future.
If you’re a user with Publisher or Administrator level access, you can add, edit and manage study sources, needs and recommendations in the PRIME database using the analysis tools. Guidance on selecting and entering content to, and maintaining, records can be found in PRIME FAQs.

**Tools for Publishers**

*Add a New Study Source*

Follow the steps below to add a new study source.

1.) Click **Add** in the Main analysis tools.

2.) Select the **Yes, I’m adding a new planning source** option, then click **Continue**.
PRIME

You’re now presented with the New Planning Source entry form which contains three tabs. You can navigate back and forth between the tabs by clicking the tab name. Tabs include:

- **Details** – contains the title, source type and other relevant details about the planning source [Default tab]
- **Contacts** – allows you to list the names, phone numbers and email addresses of all relevant contacts for the planning source
- **Attachments** – provides the ability to add images, documents and other files to the source

**NOTE:** You must complete all required fields on the **Details**, **Contacts** and **Attachments** tabs. Required fields are indicated by an asterisk (*).

On the **Details** tab:

1. **Study/Policy/Event Title**: Enter the full title for the study, policy or event.
Figure 1: example study/policy/event title.

*Study/Policy/Event Title: Liberty State Park Circulator Cost Benefit Analysis

4.) **Source Type:** Select a source type from the dropdown, options include: Planning Study, Policy and Outreach Event.

5.) **Study/Policy/Event Date:** Enter date of the study, policy, or event by selecting the numeric month and year from the dropdowns.

*Study/Policy/Event Date: 5 2013

6.) **Prepared By:** Enter the name of the agency or organization that prepared the source.

*Prepared By: Sam Schwartz Engineering, D.P.C.

7.) **Prepared For:** Enter the name of the entity the planning source was prepared for.

*Prepared For: City of Jersey City, New Jersey

8.) **Planning Topic:** Select a planning topic from the dropdown, options include: Transportation, Land Use and Environment. Click the Add Topic button to add the selected topic to the planning source. **Note:** You can add more than one topic if needed.

*Planning Topic: Add Topic

Figure 4: planning topic examples.

9.) **Study/Policy/Event Description:** Enter a description for the planning source. This is typically an overview or summary of the study, policy or event.
10.) Figure 5: planning source description example.

*Study/Policy/Event Description: This study analyzed a range of options for mass transit service to serve destinations in Liberty State

11.) **Study/Policy/Event Location Description:** Enter a description for the location.

Figure 6: planning source location example.

*Study/Policy/Event Location Description: Liberty State Park

12.) **Agency:** Select your agency from the dropdown.

13.) **Status:** Select the current status of the planning source. Options include:
   a. Pending (*Default Value, Inactive – No known follow-up*)
   b. Active (*In Process – Being utilized for project development that is scheduled or underway*)
   c. Partially Addressed (*Some Progress - Some elements advanced, addressed or otherwise resolved*)
   d. Addressed (*Progress complete - Completed, addressed or otherwise resolved*)
   e. Mockup (*For testing purposes only*)
14.) Click **Continue** to navigate to the Contacts tab.

**On the Contacts tab:**

15.) **Select an Existing Contact:** Check the existing contacts list first by typing an entry into the **Contact Name, Contact Phone** or **Contact Email** fields or use the scroll bar at right to view the list.

16.) Put check marks next to the individual contacts you wish to add, then click the **Add Selected Contacts** button.

17.) The selected contacts will now be listed in the **Added Contacts** list.
18.) **Add a New Selected Contact**: If your contact is not found in the Existing Contact list, enter the **Contact Name**, **Contact Phone** and **Contact Email** into the provided fields under Add New Contact then click the **Add New Contact** button.

19.) The contact will now be listed in the **Added Contacts** List. The contact will also be recorded and added to the Existing Contacts list for future use.

20.) Click **Continue** to go to the Attachments tab.

**On the Attachments tab:**

![Attachment Details](Image)
21.) **Upload Attachments:** Click the **Choose File** button to open file explorer on your computer, then select the file you wish to upload. Next, click the **Open** button to upload the file.*

22.) **Attachments:** The uploaded file will now be listed in the Attachments list.

```
Attachments:
Central Bergen Bicycle and Pedestrian Plans and Appendices (Electronic Sharing Letter).pdf
```

23.) **Delete an Attachment:** Clicking the [x] next an attachment will delete it from the planning source.

24.) Once you’ve completed your entries on all three tabs, click **Continue**. If you have not entered all required fields when pressing **Continue**, the system will return you to the specific tab location where an error message will identify the field(s) that are missing information.

You are now directed to the map where you can select and enter location features for the new planning source. See the next topic to learn how to add source features.

* **Attachment size limit is 75 MB per file with no limit on number of files.**
Add Study Source Features

After completing all three tabs on the New Study Source form and clicking Continue, you will be directed to the Map Locations interface to enter the location of your record into PRIME. You can add and select study source locations manually using the Select Pre-Defined Locations hierachal filter, or use the Define Custom Locations tools to add a new study location to the map interface.

Guidance on selecting and entering geographic features to records can be found in PRIME FAQs.

Select Pre-Defined Locations

The Menu Select option provides a way to drill down into locations and facilities manually using a hierarchal filter approach. This type of search works well when the exact map coordinates for a location or facility are not known or you need to search for specific attributes.

Location Searches

Menu Select Search. Options include:

- Counties
- Municipalities
- Legislative Districts (State)
- MPO Boundaries

Steps:

1.) Ensure the Menu Select radio is selected.
2.) Next, if collapsed, click **Location** to expand the Location filter.

3.) **Search by**: Select **Municipalities** or **Counties** from the Search by dropdown to filter available features.

4.) **Select Feature**: Select the desired municipality or county from the dropdown.

5.) Then, click **Search** to run the query and populate the **Search Results**.

**Facility Searches**

Manual Facility Search options include:

- Light Rail Stations
- NJ Transit Rail Stations
- Railroad Lines
- Ferry Lines
- Roads
Steps:

1.) Ensure the **Menu Select** radio is selected.

2.) Next, if collapsed, click **Facility** to expand the Facility filter.

![Facility Filter](image)

*Note: Roads has different filter options. Advance to step 6: additional steps below.*

3.) **Search by**: Select one of the options listed above from the Search by dropdown to filter the available features.

4.) **Select Feature**: Select the desired feature from the dropdown.

5.) Click **Search** to run the query and populate the **Search Results**.

![Search Results](image)

Additional **Roads** Filter Steps:
6.) **County**: Select a **County** from the dropdown.

7.) **Municipality**: Select a **Municipality** from the dropdown.

8.) **Route Type**: Select **Route Type** from the dropdown.

9.) **Route Number**: Select **Route Number** from the dropdown.

10.) **Route Name**: Select **Route Name** from the dropdown.

11.) **Route Direction**: Select the direction of route*

12.) **From MP**: Select the **From Mile Point** from the dropdown.

13.) **To MP**: Select the **To Mile Point** from the dropdown.

14.) Click **Select Roads** to run the query and populate the **Search Results**.
NOTE: For roadways with separate directional travel lanes (e.g., a divided highway or interstate highway), you will be asked to specify Route Direction following item 10. above. From the drop down menu Select the S or W entry for Southbound or Westbound MPs; select the blank choice for the opposite direction (i.e., Northbound or Eastbound) MPs.

Select from Map

The **Select from Map** tool provides a way to query for locations and facilities directly on the map. This type of search works well when you know the general location of a facility and aren’t searching for a specific attribute.

Select from Map includes three different map selection modes and selection tools.

**Selection Modes:**

- **New**: Select this mode for new map queries. It adds the queried features to the Search Results.
- **Add**: Use this mode to query additional locations and add those features to the current Search Results.
- **Remove**: Use this mode to remove queried results for a selected location from the Search Results.

**Selection Tools and Usage:**

- **Pointer**: Will query a selected point on the map. Best for querying a specific map feature.
  - **Usage**: Simply click a location on the map to perform query.
- **Circle Select**: Will query a circular area on the map.
  - **Usage**: Click and drag mouse to draw circular area on the map to query.
- **Polygon Select**: Will query a precise polygon area on the map.
**Usage:** Use single mouse clicks on the map to define the query area then double-click to perform the query.

To perform a new query:

1. Click on the **Map Layer Visibility** button and select layer features to make available for selection.

2. Ensure the **Select from Map** radio is selected.

3. Select **New** as your Selection Mode.

4. Click desired selection tool: **Point**, **Circle** or **Polygon**.
5.) Next, based on selection tool, click or click and drag mouse on the map to select the desired area and run the query.

6.) The selected area is then queried and the results are highlighted on the map and populated in the Search Results.
To Add to current query:

1.) Click on the **Map Layer Visibility** button and select layer features to make available for selection.

![Map Layer Visibility](image)

2.) Ensure the **Select from Map** radio is selected.

![Select from Map](image)

3.) Select **Add** as your Selection Mode.

![Selection Mode](image)

4.) Click desired selection tool: **Point**, **Circle** or **Polygon**.

![Selection Tools](image)

5.) Next, based on selection tool, click or drag mouse on the map to select the additional area to query.
6.) The selected area is then queried and the results are highlighted on the map and populated in the Search Results.

To Remove features from the current query:

1.) Ensure the **Select from Map** radio is selected.
2.) Select **Remove** as your Selection Mode.

3.) Click desired selection tool: **Point**, **Circle** or **Polygon**.

4.) Next, based on selection tool, click or drag mouse on the map to select the features you wish to remove from the current query.

5.) Features in the selected area are then removed from the Search Results and no longer highlighted on the map.
Add Search Results to the Source

Whenever you perform a query using the Menu Select or Select from Map options, the results are returned in the Search Results table. From here, you can zoom into a search result feature on the map as well as add the selected feature to the source.

Menu Select searches return only the filtered feature type or attribute in the results, while Select from Map searches return all feature types listed out by category and number of results per category.
NOTE: The applications map query tool has a threshold of 1K results per feature layer type. If you don’t see a feature you expect to see in the search results, you may need to zoom in closer on the map and submit a new query, query a smaller area or try a Menu Select search instead.

**Zoom** into a Result:

1. Click the **Zoom** link next to the feature to highlight it and zoom into it on the map.
Add a Result to the source:

1.) Click **Add** next to a feature to add it to the source.

![Add Feature](image)

2.) The feature will then be listed in the **Locations Added** table.

![Locations Added Table](image)

Clear Results:

1.) Click **Clear Results** to clear all results from the Search Results table.
Define Custom Location(s)

You can import location features into PRIME using Import Feature(s) command as well as add them manually using the drawing tools. You may also Use Source Geography from an existing PRIME record.

Add locations using Import Features:

1.) Click the Select Import File button next to Import Features to open file explorer on your computer, then select the file you wish to upload. Next, click the Open button to upload the file.

2.) The uploaded features will be imported and added to the source locations.
Add locations using Use Source Geography:

1.) Click the **Use Source Geography** button add the location feature(s) from the parent Source record to the current record.

2.) Next, click the **Edit** command to re-name or modify a location feature.
3.) Click **Remove** to delete a location feature.

Add location using the Drawing Tools:

The **Add New Feature** drawing tools allow you to create and add specific map locations and features to a source. This is useful when you need to define a specific location, attribute or boundary on the map that isn't a pre-defined PRIME location or feature (e.g. municipality, road, county, etc.)

**Drawing tools include:**

- **Point**: Will add a point on the map.
  - **Usage**: Simply click a location to add to map.
PRIME

- **Circle**: Will draw a circle on the map.
  - **Usage**: Click and drag mouse to draw circle and release mouse when done.

- **Polygon**: Allows you to draw a precise polygon area on the map.
  - **Usage**: Use a series of single mouse clicks on the map to define a bounded polygon area then double-click to complete.

- **Line**: Adds straight lines to the map. (similar to the polygon tool, but doesn’t auto close)
  - **Usage**: Use a single mouse click to select the starting point then double-click map where you want the ending point.

To add a Feature:

1.) Click desired drawing tool: **Point, Circle, Polygon** or **Line**.

2.) Next, based on drawing tool selected, click or drag mouse on the map to draw the new feature. Release mouse or double-click when done drawing.

*Figure 7: polygon example.*
3.) The newly drawn feature is added to the **Locations Added** table with generic ‘draw’ labels for the Location and Source.

4.) Click **Edit** to rename the Location or the Source.

5.) Click **Submit** when done.

**Zoom** to a Feature:

1.) Click the **Zoom** link next to the feature to highlight it and zoom into it on the map.
Add a Recommendation or Need to a Source

Follow the steps below to add a new recommendation or need to a study source.

1.) Start by clicking **Add** in the Main analysis tools.

2.) Select the **I’m adding needs and recommendations to an existing planning source** option.
3.) Next, select the study source you wish to add the recommendation to from the dropdown, then click **Continue**.

4.) Select **Need** or **Recommendation** from the **Entry Type** dropdown.

Like the Source entry form, you’re now presented with the Need/Recommendation entry form which contains three tabs. You can navigate back and forth between the tabs by clicking the tab name. Tabs include:

- **Details** – contains the title, related source and other relevant details about the need [Default tab]
- **Contacts** – allows you to list the names, phone numbers and email addresses of all relevant contacts for the planning source and or need
- **Attachments** – provides the ability to add images, documents and other files to the need

The dropdown at the top of the form will denote which entry type you’ve selected.
NOTE: You must complete all required fields on the **Details**, **Contacts** and **Attachments** tabs. Required fields are indicated by an asterisk (*).
On the Details Tab:

5.) **Need or Recommendation Title**: Enter a title for the need.

*Need Title: *Transit Access Needed via 834 Route to Middletown Senior Housing*

6.) **Planning Source**: Select the applicable planning source from the dropdown.

7.) **Planning Topic**: Select a planning topic from the dropdown, options include: Transportation, Land Use and Environment. Click the **Add Topic** button to add the selected topic to the need or recommendation. **Note**: You can add more than one topic if needed.

8.) **Summary of Need or Recommendation**: Enter a summary of the proposed need or recommendation.

*Summary of Need: *Bus transit access is needed on the NJ TRANSIT 834 Route to Daniels Towers and Alice V. Tomasso Plaza, two senior housing

9.) **Need Type** [you’ll see this option if adding a need. Skip to step 11 if adding a recommendation]: Next, select the Need Type from dropdown menu.
10.) Then click **Add Need Type** to add it to the need details. Repeat to select multiple Need Types.

11.) **Action** [you'll see this option if adding a recommendation. Return to step 10 if adding a need. Advance to step 14 if adding a need]: Next, select the action type from the first menu and the corresponding sub-category from the second menu.

12.) Then click **Add Action** to add it to the recommendation details.

13.) **Tags:** Select the tag type from the first menu and the corresponding tag from the second menu.
14.) Then click **Add Tag** to add it to the need details.

15.) **Status:** Select the current status of the need or recommendation. Options include:
- **f.** Pending *(Default Value, Inactive – No known follow-up)*
- **g.** Active *(In Process – Being utilized for project development that is scheduled or underway)*
- **h.** Partially Addressed *(Some Progress - Some elements advanced, addressed or otherwise resolved)*
- **i.** Addressed *(Progress complete - Completed, addressed or otherwise resolved)*
- **j.** Mockup *(For testing purposes only)*

16.) Click **Continue** to go to the **Contacts** Tab.

On the **Contacts** tab:
17.) **Select an Existing Contact**: Check the existing contacts list first by typing an entry into the **Contact Name**, **Contact Phone** or **Contact Email** fields or use the scroll bar at right to view the list.

Select from existing contacts within the PRIME system:

- Steve M
- Test Contact
- Patty Pathmaster

18.) Put check marks next to the individual contacts you wish to add, then click the **Add Selected Contacts** button.

19.) The selected contacts will now be listed in the **Added Contacts** list.
20.) **Add a New Selected Contact:** To add new contacts to the system. Enter the **Contact Name**, **Contact Phone** and **Contact Email** into the provided fields then click the **Add New Contact** button.

![Add a New Contact Form]

21.) The contact will now be listed in the **Added Contacts** List. The contact will also be recorded and added to the Existing Contacts list for future use.

![Added Contacts List]

22.) Click **Continue** to go to the Attachments tab.

On the **Attachments** Tab:
23.) **Upload Attachments:** Click the **Choose File** button to open a file explorer window on your computer, then select the file you wish to upload. Next, click the **Open** button to upload the file.

24.) **Attachments:** The uploaded file will now be listed in the Attachments list.

25.) **Delete an Attachment:** Clicking the [x] next an attachment will delete it from the planning source.

26.) Click **Continue**.

You are now directed to the map where you can select and enter location features for the new need or recommendation. See the **Add Study Source Features** topic for detailed steps.

**Edit Source, Needs and Recommendations Records**

There are a few options for editing Source, Need and Recommendation records in PRIME. As a Publisher, you can edit records created and added by you as well as records added by other Publishers in your agency.

**My Data – Edit Your Records**

The **My Data** tab contains a list of all records you have created and added to PRIME – including Sources, Needs and Recommendations.
To edit My Data:

1.) Click **My Data** to navigate to the My Data tab.
2.) Click **Edit** next to the Source, Need or Recommendation record you wish to edit.
3.) Next, make desired edits to the selected item. See the [Add a New Study Source](#) for detailed steps.
4.) When done, click **No, I’m finished** to save your edits and return to My Dashboard, or
5.) Click **Yes, Continue** to add a new recommendation or need to the current source.

**My Agency Data – Edit Agency Records**

The **My Agency Data** table contains a list of all records that other Publishers at your agency have added to PRIME—including Sources, Needs and Recommendations.

Follow the steps below to edit My Agency Data:

1.) Start by clicking **Edit** in the Main analysis tools.
2.) Click **Edit** next to the source, need or recommendation you wish to edit in the Agency Data table.

3.) Next, make desired edits to the selected item. See the [Add a New Study Source](#) topic for detailed steps.

4.) When done, click **No, I’m finished** to save your edits and return to My Dashboard, or

5.) Click **Yes, Continue** to add a new recommendation or need to the current source.

**NOTE:** You can also edit sources added by your agency from the Search & Connect ‘Results’ table or from the “Details” popup window by clicking the **Edit** command.
Administrator Review and Approval of Records

Records entered into PRIME are subject to a review and approval process that controls access and view capabilities to selected users at specific Access levels. This allows agencies to retain internal control of their records until ready for sharing with outside users. Figure 9. below illustrates the review and approval process used in PRIME and record visibility status.

Figure 9: PRIME Review and Approval Process and Record Visibility

1) Publisher level users and above at Agency “A” enter a new record into PRIME. All users belonging to Agency “A” can view (and those at Publisher level and above can edit) a new record as soon as the entry is saved in the system. This allows users in Agency “A” to work together to refine the new record while in a “draft state.” During this time, the record will remain visible only to Agency “A” staff.

2) When the record is ready to be made available to All Other PRIME Users outside of that agency, an Agency “A” Agency / Subregion Administrator must review and approve the
record before it can be advanced for publishing. During the review process, the Agency Administrator can make modifications to any of the entry’s details including its attachments, contacts, locations and connections, or may reject the record and enter notes in the Comments Box describing what steps would be needed by Agency “A” staff to address concerns.* Once approved, the record is flagged for review by the PRIME System Administrator. During this time, the record will remain visible only to Agency “A” staff.

3) The **PRIME System Administrator** will review the record to ensure that it conforms to PRIME standards. During the review process, the PRIME System Administrator can make modifications to any of the entries details including its attachments, contacts, locations and connections, or may reject the record and note in the Comments Box what steps would be needed by Agency “A” staff to address concerns.* Once approved, the record is published and accessible to all user levels across all agencies.

Notification that a record is available for both **Agency / Subregion Administrator** and **PRIME System Administrator** review will appear in their respective notification menus based on the above sequence.**

*NOTE: An Administrator cannot delete a record while undergoing the review process. This must be done outside of the review process.

**NOTE: All records entered will appear in the Notification window as soon as they are entered. Administrators should check with their agency staff to determine when records are actually ready for review.

Steps to review:

1.) Click **GO** to navigate to the Review Data screen which shows the list of data entries awaiting review by **Type, Title, Source, Topic** and **Agency**.
2.) Click **Review** to open a record that you wish to review.

3.) Review the following tabs and make edits if needed. (See the [Tools for Publishers](#) section for detailed steps on editing each tab)

   a. **Details** – contains the title, source type and other relevant details about the entry
   b. **Attachments** – contains any attached images, documents and other files
   c. **Contacts** – list the names, phone numbers and email addresses of all relevant contacts for the entry
   d. **Connections** – lists any connections between the current entry and other entries

4.) Click **Modify Locations** to review the locations and make edits if needed. (See the [Add Study Source Features](#) section for detailed steps on editing locations)

5.) Next, to **Approve an Entry**: Click the **Comments** tab and enter any notes or comments you wish the Publisher to see about the approval.

6.) Click **Approve** to approve the entry.

7.) To **Deny an Entry**: Click the **Comments** tab and enter any notes or comments regarding why the entry is being denied.

8.) Click **Not Approved** to deny the entry.
User Management

PRIME System Administrators have the authority to approve new user account requests. Once approved, Agency / Subregion Administrators manage their agency’s users within PRIME.

New User Requests

New user requests submitted to PRIME are sent directly to the PRIME System Administrator for review. Once approved by the PRIME System Administrator, the user shall receive an E-Mail notifying them of the account approval and log-in credentials. User requests awaiting review will appear in the PRIME System Administrator notification menu, along with the number of requests.

Following PRIME System Administrator approval, a user account is managed by the Agency / Subregion Administrator for the Agency selected in the New PRIME Account Request screen. Agency / Subregion Administrator permissions include approval for changes to account Access Level and disabling accounts.

Steps to review:

1.) Click **GO>** to navigate to the User Management screen which shows a list of all users and all requests. New User Requests are listed first and highlighted in green.

2.) Click **Approve** to approve the request.

3.) Or click **Deny** to deny the request.

4.) The user who submitted the request will receive an update via email as to the status of their request.
Update Access Level Requests

Existing PRIME users have the option to request additional system access or request access updates. These requests must also be approved by an administrator. Request awaiting your review will show up in the notification menu, along with the number of requests.

Steps to review:

1.) Click **GO** to navigate to the User Management screen which shows a list of all users and all requests. User Access Update Requests are highlighted in yellow.

2.) Click **Approve** to approve the request.

3.) Or click **Deny** to deny the request.

4.) The user who submitted the request will receive an update via email as to the status of their request.

Manage Users

As an administrator, you can disable a user’s access as well as update the following user information:

- **Group** – the PRIME group the user belongs to
- **Access Level** – the user’s role or level of access in the system
- **Email** – user email address

To update user information:
1.) Click **Manage** next to the user whose information you wish to update to enable edit mode.

2.) Make the desired edits.

3.) Click **Save** when done.

To disable a user:

1.) Click **Manage** next to the user whose information you wish to update to enable edit mode.

2.) Click **Disable**.

To enable a user:

1.) Click **Manage** next to the user whose information you wish to update to enable edit mode.

2.) Click **Enable**.

**Agency and Group Management**

As System Administrator, you also can manage and create new Subregion & Agency Groups.

**Add / Edit Groups**

To add or edit a group, navigate to the management page by clicking Agency and Group Management in the main navigation menu.
To add a new group:

1.) Click **Add New**.

2.) Enter a **Name** in the Group field.

3.) Select an **Agency** from the Agency dropdown.

4.) Click **Save**.
To edit an existing group:

1.) Click **Edit**.
2.) Update the **Group** and/or **Agency** as needed.
   
   Click **Save**.
APPENDIX A: Menu Selection Choices

The following tables list all drop-down menu selection choices available for each record type in PRIME.

<table>
<thead>
<tr>
<th>Source Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Source Type</td>
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<tr>
<td>o Planning Study</td>
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<tr>
<td>o Policy</td>
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<tr>
<td>o Outreach</td>
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<tr>
<td>• Planning Topic</td>
</tr>
<tr>
<td>o Transportation</td>
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<tr>
<td>o Land Use</td>
</tr>
<tr>
<td>o Environment</td>
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<tr>
<td>• Agency</td>
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<tr>
<td>o List of all agencies</td>
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<tr>
<td>• Status</td>
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<tr>
<td>o Pending</td>
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<tr>
<td>o Active</td>
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<tr>
<td>o Partially Addressed</td>
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<tr>
<td>o Addressed</td>
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<tr>
<td>o Mockup</td>
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</tbody>
</table>
## APPENDIX A: Menu Selection Choices

### Need Record

- **Agency**
  - List of all agencies
- **Planning Topic**
  - Transportation
  - Land Use
  - Environment
- **Need Type**
  - Environment
  - Land Use
  - Health
  - Safety / Security
  - State of Good Repair
  - Roadway Access / Mobility / Congestion
  - Transit Access / Mobility
  - Walk / Bike Mobility
  - Freight Mobility
  - System Connections
  - Mobility-Impaired Access
  - Travel Affordability
  - Reliability
  - Traveler Information
  - Economic Activity
  - Equity
  - Resilience / Vulnerability
- **Tag Type / Tag**
  - Mode
    - Road
    - Parking
    - Transit
    - Bicycle
    - Pedestrian

### Recommendation Record

- **Agency**
  - List of all agencies
- **Planning Topic**
  - Transportation
  - Land Use
  - Environment
- **Recommendation Type / Action**
  - Road
  - Transit
  - Dedicated Freight
  - Pedestrian
  - Bicycle
    - Enhance
    - Expand
    - Preserve
  - Intelligent Transportation
    - Technology
    - Operations
    - Incident Management
    - Communication
    - Alternate Fuels
  - Shared Ride
    - Rideshare Program
    - HOV Facilities
    - Private Mobility Services
  - Direct Safety
    - Direct Safety
  - Bridge
    - Preserve
    - New
  - Administration
    - Policy / Regulation
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<thead>
<tr>
<th>Freight</th>
<th>Enforcement</th>
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</thead>
<tbody>
<tr>
<td>Aviation</td>
<td>Coordination</td>
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<tr>
<td>Other</td>
<td>Education</td>
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<tr>
<td>Qualitative Performance</td>
<td>Aviation</td>
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<tr>
<td>Excellent</td>
<td>Preservation</td>
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<td>Good</td>
<td>Mitigation /</td>
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<td>Fair</td>
<td>Remediation</td>
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<td>Poor</td>
<td>Redevelopment</td>
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<td>Impacted Markets</td>
<td>New Development</td>
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<td>Recreation</td>
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<td>Shopping / Services</td>
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<td>Emergency Response</td>
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<td>Light Rail</td>
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<td>Regional Bus</td>
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<td>Shuttle Bus</td>
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<td>Jitney</td>
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<td>Operational Facility</td>
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<td>Right-of-Way</td>
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<td>Grade Crossing</td>
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<tr>
<td>Grade Separation</td>
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<tr>
<td>Priority Treatment</td>
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<td>Parking</td>
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<td>Service / Schedule</td>
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<td>Intermodal Connection</td>
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<td>Signals</td>
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<td>Power</td>
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<tr>
<td>Lighting</td>
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</table>
PRIME

- Pending
- Active
- Partially Addressed
- Addressed
- Mockup

- Drainage
- Clearance / Weight

- Road and Bridge
  - Signalized Intersection
  - Un-signalized Intersection
  - Travel Lane
  - Interchange
  - Traffic Circle Ramp
  - Shoulder
  - Right-of-Way
  - Grade Crossing
  - Grade Separation
  - Geometric / Striping
  - Driveway
  - Parking
  - Crosswalk
  - Sidewalk
  - HOV / Priority Lane
  - Customer Facility
  - Operational Facility
  - Pavement
  - Drainage
  - Lighting
  - Signage
  - Traffic Calming
  - Complete Streets
  - Vehicles
  - Clearance / Weight
  - Bridge Deck
  - Bridge Structure

- Pedestrian and Bicycle
  - Crosswalks
  - Sidewalks
APPENDIX A: Menu Selection Choices

- Paths
- Lanes
- Geometric Striping
- Lighting
- Signals
- Signage
- Pavement
- Intermodal Connection
  - Policy and Coordination
    - Tolls / Fees / Fares
    - Restrictions
    - Compliance
    - Cooperation
    - Agreement
  - Land Use
    - Transit Oriented Development (TOD)
    - Sustainability
    - Access
    - Employment / Population Density
  - Freight
    - Freight Rail
    - Truck
    - Waterborne
    - Intermodal Connections
    - Port
    - Pier
    - Yard / Terminal
    - Parking
    - Fuel / Service
    - Delivery
    - Storage
    - Vehicles
# APPENDIX A: Menu Selection Choices

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<th>Clearance / Weight</th>
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<td>◦ Active</td>
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<td>◦ Partially Addressed</td>
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<tr>
<td>◦ Addressed</td>
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<td>◦ Mockup</td>
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