Longview Capital Planning Tool Quick Reference Guide

How to perform essential tasks in Longview CPT

October 6, 2017
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Capital Planning Basics

Capital planning is managed on an annual basis although it is occurring in many forms – especially through discussions that guide and structure projects and the relationships between projects – all year long. Formal and informal discussions are focused on three objectives:

1. Enhance planning for capital needs as issues and opportunities emerge;
2. Maintain a prioritized list of needs that can shape the capital plan and planning decisions in future years, and
3. Align funding resources with priority needs.

Capital plan submissions need to be general enough to inform thoughtful and engaged development of a five-year plan – allowing for adjustments in scope, schedule and budgets to optimize outcomes – balanced, as appropriate, with an appropriate level of detail to create a meaningful one-year capital budget.

Annual Capital Planning Cycle

The formal annual capital planning cycle typically begins in August with a memo to the units that identifies important considerations for the cycle and announces that the Longview Capital Planning Tool (CPT) is open for submission revisions and additions.

The system is planned to be open between August – early January, with several intermittent closures to allow for development of draft reports and progress discussions with the units. All submissions are expected to be revised and complete by early January.

The Division of Budget and Planning then drafts the annual capital budget and the five-year capital plan from the CPT submissions, for presentation to a joint meeting of the Buildings & Properties and Finance Committees of the Board of Trustees in March. Any input from this presentation informs the final version of the annual capital budget and the five-year capital plan presented to the full Board and included in the Operating & Capital Budget Plan in May.

Overview of Longview CPT Submissions

During the annual submissions period, units are expected to 1) review and modify those items already in the tool, 2) submit any newly identified needs and projects, and 3) prioritize the full list of unit needs and projects. It is particularly important to identify needs/projects greater than $3-5M that have not been previously identified; these should be entered into the CPT with appropriate explanation of the need and scope in the project description field. Entry into the CPT will initiate conversations with Capital Planning and IPP regarding scope, budget and timeline, if these have not already begun.

Any needs/projects submitted into the Longview CPT in previous cycles remain in the system and don’t need to be re-entered, although some may require updated descriptions, schedules, or budgets if they remain active as intended projects.
Guidelines for Longview CPT Submissions

All capital needs and projects with an estimated budget of $250,000 or greater and all plans to enter into new lease arrangements or extend existing leases with a net present value of $250,000 or greater should be entered into Longview CPT.

All anticipated capital spending activity for the upcoming capital budget year that will be funded by the operating budget will need to be clearly identified and funded in the fiscal year operating plan.

In general, the capital plan focuses on strategic renewal and therefore the unit submissions should be guided by the following principles and criteria:

- Program needs should be met through the re-use and redevelopment of existing space without the addition of net new space.
- Plans and projects should consider synergies and coordination between needs and resources, including addressing maintenance and renewal needs.
- Needs and projects may be submitted with funding plans for capital, operating, and renewal costs that are uncertain.

Other criteria of importance are health, life safety, risk reduction, compliance, asset protection, critical maintenance, cost savings/avoidance, and select “mission critical” programmatic and infrastructure improvements.

Text descriptions that can be entered in several fields (e.g., to describe the project and related aspects, such as alignment and space implications) are important. Every unit will need to use judgement regarding the completeness and clarity of these descriptions and units may be asked to complete or update these fields during the review periods each fall.

All projects should be included with a total project budget, even if the budget is an order of magnitude estimate or guess. IPP will work with units to understand and inform the budgets.

If the funding source is not yet identified or only partially identified, then the amount of the uncertain budget amount should be entered under “Third Party Developer” as the source and a note should be added to the project description field that indicates that some or all of the funding sources are TBD.

In general, debt is not available as a funding source unless specifically identified between unit leadership and central administration. Future availability of debt remains uncertain, so debt should not be entered as a funding source for any future year. In such cases where a project may need to rely on debt for some or all of the total project budget, that amount the unit wants to apply to debt should be entered under “Third Party Developer” as noted above.

Project Portfolios

Smaller projects (generally under $1-$2M) should be organized into portfolios (or “buckets”) of like projects and named according to a system that identifies the unit, the project type, and the year. Portfolios are proposed as two projects – a one-year project for the annual capital budget and a year two-five projects for the five-year capital plan. For each submission, the previous one-year project rolls off of the plan each year, a new one-year project is established, and the dates, description and budget are adjusted on the year two-five project.
For example:

CLES Cyclical Housing Upgrades 2018
(one-year budget, will roll off and be replaced by CLES Cyclical Housing Upgrades 2019))

CLES Cyclical Housing Upgrades 2019-2022
(year two-five project, with regularized budget for each year that can be adjusted when the project rolls forward and becomes CLES Cyclical Housing Upgrades 2020-2023)

Academic units typically have one portfolio for academic program renovations, e.g.,

CVM Academic Program Renovations 2018
CVM Academic Program Renovations 2019-2022

And one portfolio for new faculty hires, e.g.,

CVM Renovations for New Faculty Hires 2018
CVM Renovations for New Faculty Hires 2019-2022

Units may also have portfolios for Repairs/Maintenance, Facility Upgrades & Freshening, Accessibility, etc. Contact cp-help@cornell.edu for guidance regarding naming new portfolios.

This portfolio approach helps to manage the (sometimes) large variances (as a percent of total project cost) associated with small projects of a predictable type. It is not intended to provide a path toward avoiding variances; the project descriptions for portfolios will be reviewed as projects initiate and pass through the approvals process. Variances will be required when a project does not fit within the proposed portfolio.

Projects proposed in portfolios should be entered into Longview as stand-alone projects if it becomes clear that the project budget will increase beyond $2M and/or project approvals will be required in years 2 (or beyond) of the capital cycle.

Project Categorizations

Units are asked to identify every need/project with a Project Categorization that describes the major type of the activity. This Categorization will be used as one of the major organizing elements in creation of the annual capital budget and five-year capital plan.

Very large projects (generally >$10M) should be entered as two projects, with the first project identified with the Categorization “Planning.” This allows for first phase activity that has a more defined budget and scope to inform a second phase activity that does not yet have a not-to-exceed budget. The Planning phase will roll into a one-year capital budget while the second phase remains in the five-year capital plan (years 2-5). Once the second phase is imminent to roll into the one-year capital budget, the not-to-exceed project budget should be established.

Two examples of using Categorization and multiple entries to enter larger projects in Longview CPT:

<table>
<thead>
<tr>
<th>For One-Year Capital Budget</th>
<th>For Five-Year Capital Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comstock Hall Planning and Design (Planning)</td>
<td>Comstock Hall Renovation (Renewal – Programmatic Fit)</td>
</tr>
<tr>
<td>McGraw Hall Planning and Design (Planning)</td>
<td>McGraw Hall Renovation (Renewal – Programmatic Fit)</td>
</tr>
</tbody>
</table>
Longview Capital Planning Tool (CPT) Basics

Longview CPT is a web application that Cornell academic and administrative units employ to inform development of capital plans and budgets that then inform the University’s annual capital budget and five-year capital plan. Longview CPT also enables integration of the University’s capital and operating budgets.

Units should try to provide as complete a response as each field may require, as responses inform the evaluation of each proposed need and project. While it is acceptable to enter a default value of 0 (zero) or NA when the response is truly unknown, any fields left blank risk an incomplete or poorly informed evaluation of the project and possible deferral or rejection on the basis of that incomplete understanding. The more near-term the project, the more fields should be completed with appropriate level of detail.

Fields will be evaluated going forward. Units are welcome to provide input regarding fields that are difficult to complete and this information will be taken into consideration to inform the next capital planning cycle.

The system requires that you use Microsoft Internet Explorer (IE) version 8, 9 or 10.

Accessing Longview CPT

Launching your web browser and accessing the Longview CPT system.

1. Open your MS Internet Explorer browser and navigate to the following URL: https://cornell.lvcloud.com/cornellprd (for the production environment) or https://cornell.lvcloud.com/cornelltrn (for the training environment).

2. When the Longview7 sign-in window appears, choose “Single Sign On (Web)” as the authentication type, and you will be redirected to the CUWebLogin page, to enter in your NETID and Password.

3. Choose the Capital Planning Group (CapitalPlanning - Capital Planning) or Capital Reviewer Group (CapitalReviewer - Capital Planning Reviewer), depending on security access to login to the Capital Planning Portal.

**NOTE: You will see a security window pop up, warning you that if you close it, it will terminate your session. Please just minimize this window and continue on.**

Longview CPT Portal

After successfully authenticating with Longview, you will be presented with the Longview Capital Planning Portal that has been customized for your level of access.

Tasks you can carry out from the portal include:

1. Change Your Preferences, Access Longview Help, and Sign Off from Longview CPT.
2. Access any standard report templates that have been made available to you.
3. Launch either the Capital Planning or Export Capital Data Application, depending on your need. To enter a capital project or a proposed need, select the Capital Planning Application. The Export Capital Data Application was designed to support unit reporting needs. It provides the
user with the ability to export all projects and proposed needs at the lowest level possible for display and manipulation in Excel.

4. Review supportive documentation.

General Navigational Features

Fields Types Found in Longview CPT

Based on the way Longview is structured and designed, some fields will appear to be numeric, when in fact they are text fields, pull-down menus or table fields. A more detailed listing and description of the fields that fall into the below listed categories is held in the Capital Planning Project/Program Details Tab section (pages 18-24).

a. Text Fields
b. Text/Numeric Fields
c. Numeric Fields
d. Autofill Fields
e. Table Fields
f. Pull-Down Menu Fields
g. Administrative Use Only Fields

Pull-Down Menus

To access a pull-down menu, the following steps must be implemented:

1. Single click, the desired field to highlight the field option in blue.
2. Once highlighted, double click, to bring in the fields pull-down menu.

Note: Any field that is a pull-down menu has been highlighted in an “Ice Blue”, to make them easily identifiable.

Editable Cells
As you work through the capital planning process, you will notice that some fields are blue type font and others are black font. As a general rule, fields that are blue are not editable directly. These fields are either auto-fill fields or they are total fields for ‘parent’ columns or rows and may require you to expand them to edit the field. (See section below, Expanding Leaf Columns or Rows for further details). Black font fields can be edited directly.

Expandable Leaf Columns or Rows
As a general rule of thumb, if you see a hollow triangle (▷) or black shaded triangle (■), this is an expandable field, whether it be a row or column. Clicking on the hollow triangle icon (▷) will reveal one or more additional ‘children’ columns or rows, that make up the ‘parent’ column or row. For example, the ‘parent’ column “Gift Funds”, is the first column that is collapsed on the submission grid (see Capital Planning Submission Grid on page 14 for further details). By clicking the hollow triangle icon (▷) to the left of the text Gifts Funds, four additional ‘children’ columns open, for review: NO – Gifts Cash, Transfer in – From Plant Gift, Pledge payments – Capital Budget and Gifts to be Raised – Capital Budget (see Images below). To re-collapse, these fields simply click the black triangle (■) next to the ‘parent’ column, in this example Gift Funds, to close the fields.

Gift Funds Column Collapsed

Gift Funds Column Expanded
Using the Search Icon

The ‘Search Icon’ is a tool that you will use to search for a different College or Administrative Unit and to filter down the request if/when you are submitting a project or need on behalf of another unit. You will see the search icon displayed in several locations within the applications. The general use of the icon is the same throughout.

1. To begin your search, select the search icon:

2. Once selected, the Symbol Selector Window will display:

   ![Symbol Selector Window]

To search for your desired entry there are three ways to use the Symbol Selector window:

1. Navigate the Hierarchy manually by scrolling through the list
2. Navigate the Hierarchy manually, using the drill-down method
3. Use Text Search

Navigate the Hierarchy manually

To navigate manually by scrolling down the list:

1. To search manually, use your mouse or screen directive arrows to scroll down the page, to the College/Unit that you wish to select as the Responsible Unit. Once found, single click the appropriate College/Unit to display a green “+” icon ('). This feature allows you to select that symbol. The selected symbol will then display in the Selected Symbol tab with a grey “-” icon ( ).

   ![Symbol Selector Window scrolled down]
2. Select the OK button to proceed with the selection.

Navigate the Hierarchy manually
Using “Drill down” for your search

1. Click on the hollow triangle icon (∨) to the left of the organization. This will expand the hierarchy one level, turning the icon black, and tipping it over (∧). Continue to click the hollow triangle icons (∨) until you reach the org level (or account) you want.
2. Click on the green ‘+’ icon (➕) to select that symbol and it will move to the Selected Symbols tab below.
3. Ensure the College or Unit you want is in the Selected Symbol tab with a grey “-” icon (➖)
4. Click the OK button to proceed with that selection.
Navigate the Hierarchy manually using Text Search:

To search for the name of a College or Administrative Unit:

1. Type the text you are searching for in the “Search Names and Descriptions” box in the upper right of the symbol selector.
2. The predictive search will start displaying all the matches in the Search Results section at the bottom of the window.
3. Once you have found the symbol you are looking for (the appropriate Org Code based on your search will display), click on the green “+” icon (●) to select that symbol. This will move that symbol to the Selected Symbols tab (as above).
4. Click OK to continue.
Capital Planning Application

The Capital Planning application is where all capital project requests and/or proposed needs will be entered into the system. Within the application, the user has the ability to add a Capital Request or Proposed Need, submit supporting details and relevant budget information, view and update any submitted project or need, filter project requests and change the status of a project.

Launching the Capital Planning Application

1. To begin, single click the Capital Planning Link:

   ![Capital Planning Apps](image)

   - Capital Planning - Version 3
   - Export Capital Data

2. This will launch the Update Capital Projects- Organization Planning Selector window (below):

   ![Update Capital Projects](image)

   *Capital Planning- Organization Planning Selector – OR “Update Capital Projects Window”*
Organizational Approach
The Planning Selector Window has been organized by Colleges and Administrative Units. If you have clearance to access more than one unit, you will see those units in the window, and can click on any one of them to begin your planning. If you have access to only one College or Administrative Unit, the appropriate College or Administrative Unit will display in the planning selector window, for you to select your Capital View and Data Grid Display (see below for more information on Capital Views and Data Grid Display). The Planning Selector window for anyone with Administrator access will show all the Colleges and Administrative Units. Once the College or Administrative Unit is selected, the appropriate Organization Code (Org Code, e.g., C_2300_C (Engineering)) will display on the Capital Planning Submission Grid (see below for further details on the Capital Planning Submission Grid).

Some Units such as Infrastructure, Properties and Planning and Student and Campus Life that have more complex organizational and funding structures have department-level tabs, also with four-digit department level codes. Projects can be entered at this level as well. All projects within a unit will be visible at the College/Unit level.

Capital Views:

Lock: This view should be utilized when entering a capital request or proposed need. The Lock view will prevent another user of the system from editing the project data.

Read Only: This view allows multiple users to view the data at once. In Read Only display, all cells are non-editable, meaning they will appear in a blue text font and remain locked to all users, except the one who first entered the system under Lock view.

Please note: If you try to enter the system under Lock display and another user is already in the system, you will receive a LOCK CONFLICT and will be taken into the system as Read Only.

Data Grid Display:

Submitting Unit: A Submitting Unit is the unit submitting projects or needs on the behalf of another unit or itself. For example, units such as Infrastructure, Properties and Planning (IPP) may submit on behalf of other Colleges/Units for IPP projects. The Submitting Data Grid Display allows the user to see all projects or proposed needs that a unit has submitted on behalf of itself or another unit.

Responsible Unit: A Responsible Unit is the unit associated with the capitalization of the asset. The Responsible Unit Data Grid Display allows the user to see all projects that have been submitted on its behalf by another unit in addition to the project(s) submitted by the unit itself. The data in Responsible view is automatically set to “Read Only” in an effort to eliminate changes to projects or proposed needs submitted by another unit.

Note: The Submitting Unit and the Responsible Unit can be the same.
Navigating the Responsible Hierarchy

If you select “Responsible” as your data grid display, a window will appear similar to the Symbol Selector Screen. Please follow the steps below to access your assigned College/Unit:

1. Select Responsible as your Data Grid Display.
2. Click the search icon to navigate the hierarchy for your College or Administrative Unit by using the symbol selector screen (see Using the Search Icon on page 9, for further instructions).
3. Click “Next” to continue to the Data Grid.

The Organizational Approach is the default and only approach used for Capital Planning.

To select your assigned College or Administrative Unit:

1. Choose your Capital View
2. Select the Data Grid Display
3. Choose the College/Unit for which you want to view/enter data
4. Click Next

5. Once you click “Next” in the Planning selector window, Longview CPT will load the account data from your selection into the Capital Planning Submission Grid. This Grid is where you will begin your data entry. You will also be able to export data from the submission grid into Excel for your reporting needs. Please see section below entitled Capital Planning Submission Grid for further information.
Capital Planning Submission Grid

The Capital Planning Submission Grid is the portal hub that holds all capital activity requests or needs at the College/Unit level.

The Capital Planning Submission Grid has four key sections:

1. **Toolbar:**
   
   a. **Filter Requests:** Use this feature to filter down project requests and needs within the Capital Submission Grid. A new window will display based on the filter criteria used. Results can then be exported to Excel for reporting needs.
   
   b. **Data Table View:** This feature offers additional filter capability by allowing the user to filter project requests and needs, rearrange columns by dragging and dropping, group projects by any given category and filter within the result set. Results can be exported to Excel for reporting needs.
   
   c. **Add Request:** Enter a capital activity request or need by selecting the Add Request feature. Further details on adding a request are outlined below, as this is the main tool that will be used for project input.
   
   d. **Save:** Save commits your additions, deletions and changes to the Longview CPT database. *Note: If you close the screen before saving, you will lose all of your work.*
   
   e. **Export List:** Use this feature to export the data held in the Capital Planning Submission Grid to Microsoft Excel.
   
   f. **Print Preview:** As the name implies, users can preview their printout before sending it to the printer.
   
   g. **Options:** Allows the user to selectively choose information you want to display, e.g., symbol name or description for the dimensions on the screen.
h. **Close:** This button closes the current grid and returns the user to the Longview CPT Portal. If you have not previously saved your work, you’ll be prompted to do so.

2. **Tabs:**
   a. **All Requests:** The All Request Tab displays every project entered into the system by the selected unit, regardless of funding and capital expenditures. This is the only tab that will display projects that only have prior and current year spending.
   b. **1 Year Requests:** The 1 Year Requests Tab displays only projects/needs that anticipate spending in the planning year.
   c. **10 Year Requests:** The 10 Year Requests tab displays the 1 year requests details in addition to projects that anticipate spending in the next 10-year time frame. If you are planning for a project that is beyond the next immediate ten years, these projects will display on the All Request Tab.

3. **Instructions Link:** This feature provides on-site field instructions that are available on the Capital Submission Grid, Project Details tab and Budget tab.

4. **Capital Planning Submission Grid Features:** This area of the grid is where your data will be displayed, in summary format. To take action on a project request, right-mouse click under the desired project name to display the following options:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Cut the contents of a cell, to be placed in another cell.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copy the selected cell’s content.</td>
</tr>
<tr>
<td>Paste</td>
<td>Paste values from the clipboard into a cell.</td>
</tr>
<tr>
<td>Freeze</td>
<td>Use Freeze to Freeze the screen in place, right click to Unfreeze.</td>
</tr>
<tr>
<td>Comments</td>
<td>See Adding Comments section below.</td>
</tr>
<tr>
<td>Attachments</td>
<td>See Adding Attachments section below.</td>
</tr>
<tr>
<td>View Project Details</td>
<td>See Viewing Project Details on Page 18.</td>
</tr>
<tr>
<td>Duplicate Request</td>
<td>This feature allows you to duplicate the previously entered request or any selected request, if necessary.</td>
</tr>
</tbody>
</table>
Adding a Request

1. To begin entering a project request, you will need to select the add request icon, located towards the upper left corner of the Capital Submission Grid Toolbar.
2. Once selected, you will be directed to the “Add Capital Request” screen (shown to the right), which appears as an additional window.
3. Fill in the required fields shown to the Right. Please note: You only need to enter in a value for either Estimated Total Budget or Net Present Value (Leases). One is required, but not both.
4. Select OK, to load the request or need to the Capital Submission Grid.

Tip: From this window, you will enter the basic details of your project or proposed need, that will load directly into the Capital Planning Submission Grid and the Project Details Tab (see below for more details on the Project Details Tab). The tool was designed to allow you to enter multiple projects at once. When you select ‘OK’, the Add Capital Request window will redisplay and allow you to enter your next project request. If you prefer to enter each project one by one, simply click ‘Close’ and the project request entered will display in the Submission Grid.

Note: Longview CPT was designed to assume that the Submitting and Responsible College/Unit for a project request and/or need are the same. However, if another College or Administrative Unit is the Responsible Unit for the project or need, use the search icon to select the appropriate College/Unit. (Please refer to General Navigational Features, located on pages 7-9, for additional details on Using the Search Icon).

Please Note: When you ‘Add a Capital Request’, the name that displays in RED is the identifier for the “Submitting Unit”.

Viewing Project Details

1. Underneath ‘Project Name’, right click to select ‘View Project Details’.

2. Single click ‘View Project Details’ to display the Capital Planning Project Request Screen (see section titled Capital Planning Project Detail Tab below for further details):
Capital Planning Project Details Tab

The project details tab is intended to hold details about the requested capital activity or need. Although termed ‘Project Details’, a program need at any level of development may be entered under this tab. The project details tab has several key sections by type of information that describes the project or program need. All the fields are required to have an entry. If a field is not applicable, please enter ‘0’ or ‘None’, depending on whether it is a number or text field.

Outlined below are the key sections of the Project/Program Details Tab:

Reference Information
The reference information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach Files Here</td>
<td>Attachments Only</td>
</tr>
<tr>
<td>Project Identifier</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Project Categorization</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>PAR# (Use semicolons between numbers)</td>
<td>Text/Numeric Field</td>
</tr>
<tr>
<td>Funding Account #</td>
<td>Text/Numeric Field</td>
</tr>
<tr>
<td>eBuilder Number(s)</td>
<td>Numeric Field</td>
</tr>
</tbody>
</table>

1. Attach Files Here: Please use this field to attach any additional information needed to support your project/program request or proposed need.
2. Project Identifier: This field is for Administrative Use Only.
3. Project Categorization: This field identifies the major type of the activity and will be used as one of the major organizing elements in creation of the annual capital budget and five-year capital plan.
4. PAR #: Enter the text PAR or S-PAR followed by the number, if applicable (e.g., PAR33201401; S-PAR33201401).
5. Funding Account #: Enter the Funding Account number(s), associated with the project or need.
6. eBuilder Number(s): Enter the project number in eBuilder, if applicable.

Overall Information
This section includes general information that identifies a requested capital activity, such as the responsible college or unit, the name, description and justification for the need or project.

The overall information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td>Text Field</td>
</tr>
<tr>
<td>Submitting Org Code</td>
<td>Autofill Field</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Autofill Field</td>
</tr>
<tr>
<td>College/Unit Org Code</td>
<td>Autofill Field</td>
</tr>
<tr>
<td>College/Unit Name</td>
<td>Autofill Field</td>
</tr>
<tr>
<td>Facility Code</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Description</td>
<td>Text Field</td>
</tr>
<tr>
<td>Justification</td>
<td>Text Field</td>
</tr>
</tbody>
</table>
9. Justification: Please explain the reason for the need or project in full detail. The example below illustrates the type of information that should be included. Please include as many details as possible in order to best inform capital plan decision-making.

Currently, the lobby of Day Hall serves as the Visitor Center for the Cornell campus. This location was not designed for this use, and does not provide the amount nor quality of space required to welcome visitors appropriately to an Ivy League campus, provide information to crowds, nor provide suitable waiting space for visitors to gather as they wait for campus tours (particularly on bad-weather days). This issue was highlighted in the 2008 Campus Master Plan with a recommendation for enhancing the campus experience. In 2011, the university hired Target-X consulting, which specializes in analyzing the visitor experience at higher education institutions, to help assess our overall visitor experience. Improving the welcome/visitor center was among the key recommendations from the consultants, as was enhancing wayfinding and transportation to the campus and Visitor Center. (Other non-capital “behavioral” and institutional recommendations for improving the visitor experience are being pursued as well, by various working groups.) The primary offices concerned with the visitor experience are Campus Information and Visitor Relations (University Relations), the Undergraduate Admissions Office, and the Graduate School, but this issue is also quite germane to the interests of Alumni Affairs and Development, International Affairs, Human Resources, and most of the academic units on campus, and affects the operational strategy for Transportation Services. Recruitment of highly-sought students depends in part on their initial experience at Cornell, which is often through visiting the campus with their families. Recruiting top quality researchers, faculty and staff also depends in part on the ambience of the first on-campus experience.
Status Information
This section identifies information about the phase of your project or need, as well as costs and schedules relative to the capital plan and actual project commencement and completion.

The status information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized Budget to Date</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Actuals to Date</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Estimated Total Budget</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Net Present Value (Leases)</td>
<td>Autofill Field</td>
</tr>
<tr>
<td>Year Submitted</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Capital Budget/Plan Year(s)</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Start Year</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Estimated Completion Year</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Lease Entered</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Lease Terminated</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Lease Renewed</td>
<td>Numeric Field</td>
</tr>
</tbody>
</table>

1. **Authorized Budget to Date**: Enter if applicable, otherwise leave as the default value of ‘0’.
   
   *Note: The University Budget Office will maintain this field for all projects in the Status of: Approved, Authorized, Close-Out and Complete.*

2. **Actuals to Date**: This field is for Administrative Use only and is a non-editable field. If the project is active or underway and attached to an account number in KFS, the Division of Budget and Planning will feed actuals into the system. A need that is in the early planning or project development stages will have an estimated budget but no actuals unless a PAR has initiated for these early stage activities.

3. **Estimated Total Budget**: For projects, enter the total project budget, even if the amount is an estimate. For submissions for programs without identified solutions, it is acceptable to leave as the default value of ‘0’.

   *Please Note: For programs without identified solutions and budgets, you will need to submit a request to [cp-help@cornell.edu](mailto:cp-help@cornell.edu) for the status value to be changed to Capital Plan Review.*

4. **Net Present Value (Leases)**: For leases, enter the net present value. For submissions of planned but not yet negotiated leases, it is acceptable to leave as the default value of ‘0’.

5. **Year Submitted**: Select the fiscal year for which the project or need was first submitted for capital plan approval. If the project or need was submitted before the first listed fiscal year, please select ‘Prior Years’. If the project is an ongoing project and the project activity recurs each year, please select ‘Ongoing’. One-year portfolios have a year submitted; years 2-5 portfolios that roll from one year to the next are Ongoing.

6. **Capital Budget/Plan Year(s)**: Used to identify the plan year in which a project was approved in the one year capital budget and/or reviewed for the five-year capital plan. *Note: All approved projects must go through the PAR process to obtain authorization to spend.*

7. **Start Year**: Select the fiscal year during which the project will actually or is anticipated to start. If the project is an ongoing project and the project activity recurs each year, please select ‘Ongoing’. One-year portfolios have a start year. The start year for years 2-5 portfolios that roll from one year to the next will be the first year of the portfolio (year 2), which will be updated each year the project rolls forward.
8. Estimated Completion Year: Select the fiscal year when the project is expected to be completed. One-year portfolios have a completion year (most often, the year after the start year, to allow all activity to complete). The completion year for years 2-5 portfolios that roll from one year to the next will be the last year of the portfolio (year 5), which will be updated each year the project rolls forward.

9. Lease Entered: For leases, enter in the date (MM/DD/YEAR) in which your College or Administrative Unit entered or is expected to enter the lease.

10. Lease Terminated: For leases, enter the date (MM/DD/YEAR) in which you anticipate the lease will be terminated.

11. Lease Renewed: For leases, enter the date (MM/DD/YEAR) in which your College or Administrative Unit renewed or is expecting to renew an existing capital lease.

Maintenance Information

This section identifies detailed information about the maintenance needs and status of a need or project. Information entered here should be consistent with that included in the Facilities Maintenance database (FPNMS) for consistency in reporting.

The maintenance information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance Zone</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Estimated Incremental Annual O&amp;M</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Estimated Incremental Planned Maintenance</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Estimated Maintenance Backlog Addressed</td>
<td>Numeric Field</td>
</tr>
</tbody>
</table>

1. Maintenance Zone: Please select the appropriate Campus Maintenance Zone from the pull-down menu, if the project is on the Ithaca Campus. Otherwise, select ‘None’. Please use the following link to access the Maintenance Zone list (also available under Longview Documentation on the Capital Planning Portal): https://fm.fs.cornell.edu/docs/node_doc/185_FM%20brochure%2011_11.pdf

2. Estimated Incremental Annual O&M: Enter the amount of incremental annual operations and maintenance costs (positive or negative) or leave as default value of ‘0’ if 1) this field does not apply to the need/project, 2) there is/will be no change, or 3) the value is not yet determined. The value entered here should be consistent with that entered into the PARs for the project.

3. Estimated Incremental Planned Maintenance: Enter the amount of incremental planned maintenance costs (positive or negative) or leave as default value of ‘0’, if 1) this field does not apply to the need/project, 2) there is/will be no change, or 3) the value is not yet determined. The value entered here should be consistent with that entered into the PAR for the project.

4. Estimated Maintenance Backlog Addressed: Please add the details per the facilities maintenance Uniformat categories and details on maintenance backlog as they apply to your project. If additional space is needed, please add an attachment to your project request in the Attachments Here field located on the Project Details tab. If Estimated Maintenance Backlog Addressed is not applicable to your project/need or it is ‘0’, leave as the default value of ‘0’. Please Note: Please contact Infrastructure, Properties and Planning - Facilities Management early to obtain accurate information related to your projects.
Alignment Information
This section identifies relationships to unit and university-wide activities, strategic priorities, other projects and needs and information about alignment with the Campus Master Plan and the Climate Action Plan.

The alignment information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Synergies</td>
<td>Text Field</td>
</tr>
<tr>
<td>Project Priority</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Alignment Notes</td>
<td>Text Field</td>
</tr>
<tr>
<td>Geographic Location</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Enabling or Related Project Cost</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Enabling Project Notes</td>
<td>Text Field</td>
</tr>
</tbody>
</table>

1. Project Synergies: Please describe or list projects/needs that have synergies with the proposed capital activity. Synergies can be programmatic, functional, and/or financial.
2. Project Priority: Please list the priority of this project within the unit's overall list of projects, arranging all projects in sequential order, from 1 to X. Note that the priorities need to be re-established every year or the unit list may end up with multiple projects with the same priority and/or an incomplete sequence of priorities. FOR IPP ONLY: IPP projects should include both the unit capital priority for Longview and the facilities priority index, separated by a decimal point.
3. Alignment Notes: Enter any information that pertains to how this project/need relates to advancing the campus master plan, the climate action plan, or any other unit or institutional strategic planning effort. This field provides an opportunity to describe how the project/need advances institutional strategic objectives in alignment with recognized planning efforts.
4. Geographic Location: Please enter the Geographic Location in relation to the Campus Master Plan, for the project/need in question. Reference the Campus Master Plan Zone Map on your Longview Portal Page under Longview Documentation. If you don’t yet have a good idea of where the project may occur, leave the default set to “N/A.”
5. Campus Master Plan Zone: If the project is on the Ithaca Main Campus, select the Campus Master Plan precinct or zone. Otherwise, select your campus location as best described. See the Capital Planning Documentation section in your Capital Planning Portal for a link to the Campus Master Plan Precinct and Zone Map. If you don’t yet have a good idea of where the project may occur, leave the default of “none.”
6. Enabling or Related Project Cost: Please note the total cost of enabling projects related to the proposed project or enter ‘0’ if there are no enabling projects or costs. If an enabling project is embedded within the overall project cost, enter the enabling cost here.
7. Enabling or related project notes: Please list names and brief descriptions for enabling projects. If you have entered an enabling cost that is also part of the overall project cost, explain that here. If there are no enabling projects, leave the field as is with the default value of N/A.

Space/Land Information
The fields in this section identify the building area and/or land area impacted by the project or need. If the capital activity is unrelated to a facility or land, please enter ‘0’.

The Space Information section includes the following fields:
Longview CPT Quick Reference Guide

**Space Notes:** Enter any information that pertains to how this project/need might change net or gross square footage, that is, a text description of any addition and/or demolition of space, and/or any swing space requirements, and/or any space that will be vacated by resolving this need/accomplishing this project. Also, as possible, enter approximate square footages for these changes. Leave the default of N/A if no space impacts (positive or negative) are anticipated.

**Swing Space (Sq. Ft.):** Please enter an estimate of the total square feet required or leave as default value of ‘0’, if not applicable.

**Vacated Space:** Please enter an estimate of the total square feet vacated by this project or leave as default value of ‘0’, if not applicable.

**Land Area (Acreage):** If land is involved in the need/project, enter the known or approximate acreage or leave as default value of ‘0’, if not applicable.

**Space/Land (Leases):** Please select the appropriate option from the pull-down menu.

**Space/Land Use Type (Leases):** Please select the appropriate option from the pull-down menu.

---

**Cornell University Role:** For each capital lease, select the appropriate Cornell University Role from the pull-down menu, if applicable. Otherwise, leave as default value of ‘0’, if not applicable.

*For entry: Only enter leases in which Cornell is the tenant. All other leases will be recorded and maintained by the Real Estate office.*

**Tenant Information:** Please enter sufficient Tenant information to identify the occupant of the leased space.

**Landlord Information:** Please enter sufficient Landlord information to allow reconciliation with Real Estate records.

**CU Entity:** Enter the Cornell unit responsible for the lease if different from the tenant.

**Lease Location (Address):** Enter in the physical address of the lease.

**Division of Budget and Planning Location:** Please select the appropriate location identifier from the pull-down menu.
Review Information
This section is for the use of the Administrator only, and does not need to be filled out by the units.

The review information section includes the following sections:

1. Capital Plan Status: For Review Phase Only- Not to be filled in by the units. This field will be used if needed during the Capital Plan review process to inform units of decisions and status changes for projects under consideration.

2. Capital Plan Comments: For Review Phase Only- Not to be filled in by units. This field will be used if needed during the Capital Plan review process.

Timing Information
This section is a snapshot of the budget tab. The timing of capital expenditures will populate from the data entered into the Longview CPT system.

Sources - Capital Uses Information
This section is a snapshot of the budget tab. All Source and Use information will populate from data entered into the Longview CPT system.

<table>
<thead>
<tr>
<th>Sources</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift Funds</td>
<td>0</td>
</tr>
<tr>
<td>Centrally Managed Funds</td>
<td>0</td>
</tr>
<tr>
<td>Unit Funds</td>
<td>250,000</td>
</tr>
<tr>
<td>Auxiliary and Service Ops</td>
<td>0</td>
</tr>
<tr>
<td>State Appropriations (SUOF)</td>
<td>0</td>
</tr>
<tr>
<td>Other/University Programs</td>
<td>0</td>
</tr>
<tr>
<td>Debt-Bridge Financing</td>
<td>0</td>
</tr>
<tr>
<td>Third Party Developer</td>
<td>0</td>
</tr>
<tr>
<td>Sources</td>
<td>250,000</td>
</tr>
<tr>
<td>Planning</td>
<td>250,000</td>
</tr>
<tr>
<td>Demolition</td>
<td>0</td>
</tr>
<tr>
<td>Building Renewal</td>
<td>0</td>
</tr>
<tr>
<td>Renovation</td>
<td>0</td>
</tr>
<tr>
<td>Net New Space</td>
<td>0</td>
</tr>
<tr>
<td>Administrative Systems</td>
<td>0</td>
</tr>
<tr>
<td>Lease</td>
<td>0</td>
</tr>
<tr>
<td>Sources - Capital Uses</td>
<td>250,000</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Capital Planning Budget Details Tab

The Capital Planning Budget Details identifies information about funding sources, funding uses, and schedules for expenditures. The Uses are further detailed by project type. The Sources and Uses are linked to the Kuali Financial System (KFS) to enable tracking of funds used for capital activity and link to the unit’s and university’s operating budget.

Navigating the Budget Tab

The budget tab has been divided into three sections:

1. Sources
2. Capital Uses
3. Time Periods

Capital Planning Sources

Sources (row fields): The Sources section (to the right) shows the “Color of Money”. How is your project being funded? Where is the money coming from to support your request? Please note: In Longview, the fields read bottom up. For Example: The first five rows listed on the left are ‘children’ of the ‘parent’ Gifts/Investment section and if you select the black triangle that tips upward (])). the rows will roll down into the ‘parent’ section.
Capital Gifts Income:
This section includes project funds from gifts. The gift amounts may be entered under NO (Non-Operating) - Gifts Cash (Unrestricted Gifts), Transfer In- from Plant Gifts (Restricted Gifts), Pledge Payments- Capital Budget or Gifts to be Raised-Capital Budget.

Centrally Managed Funds:
Centrally Managed Funds are funds that are approved for a project from a central funding account. This section has been expanded to include the following: Facilities Assessments, Rates and Fees, General Purpose Capital Budget Project Support Allocation and Institutional Funds.

Unit Funds - Capital Transfers In:
Unit Funds include funds from the LTIP Capital Planning Payout, Funds Functioning as Endowment and/or Capital Reserves that are transferred to the project account for capital-related activity.

Auxiliary and Service Ops (Enterprise):
This section includes funds from Auxiliary and Service Ops, otherwise known as Enterprise funds that are transferred to the project account.

State Appropriations (SUCF):
SUCF Funds are funds allocated or anticipated from the SUCF capital plan.

Other/Government Programs:
This Source should be used for all Sponsored or otherwise awarded or anticipated funds from grants and contracts, including economic development funding. This section has been expanded to include Government/Institution Legislative Proposed.

Debt-Bridge Financing
This refers to funding through short- or long-term debt. This section has been expanded to include both short- and long-term as well as internal and external debt. Please contact the Director of Capital and Space Planning if your project is expected to rely on debt financing that hasn’t already been agreed to by the Provost.

Third Party Developer
This refers to funding from a Third Party, external to any Cornell funding source and not Sponsored/Grant activity, which is used to develop the project. Note: If the funding source is not yet identified or only partially identified, then the amount of the uncertain budget amount should be entered under “Third Party Developer” as the source and a note should be added to the long description field that indicates that some or all of the funding sources are TBD.
Capital Uses

Capital Uses (row fields): The Capital Uses section identifies project expenditures and details as appropriate. In this section, units should align the expenditure of funds with the project type and sub-type.

Project Categorization (Capital Uses):

The expenditures are differentiated by project categorization to distinguish major types of capital activity. Project Categorizations include: Planning, Demolition, Building Renewal, Renewal, Net New Space, Administrative Systems and Leases.

Administrative Systems contains two sub-categories: Information Systems

Infrastructure and Support and Teaching & Learning/Student Experience. Please enter the details as they are applicable to your project. The expenditures in each of the project types and sub-types will total in the parent Capital Uses row.

Planning: Used to describe projects or needs that are in the planning and/or design phases of development. As noted on page 5, large projects should be entered as two discrete entries, with phase one identified as a Planning project.

Demolition: Used to describe projects that are primarily implemented to remove space/facilities, e.g. demolitions of unwanted/unneeded structures that have gone through the Procedure to Designate and Manage Out-of-Service Facilities, found at http://dbp.cornell.edu/home/offices/space-planning/resources/.

Building Renewal: Used to describe projects that substantially renovate existing buildings. Often called “gut renovations,” these are large projects with substantial impact on existing programs and they result in resetting the clock on a large portion or an entire building. This category may include some amount of demolition and/or new space.

Renewal: There are two options for Renewal. The scale of these projects is generally far less than full building renewal. The majority of unit (non-IPP) projects generally fit in one of these two categories.

Programmatic Fit: Used to describe projects that are primarily driven by a need to address a new or under-served programmatic need. The project may address existing infrastructure or maintenance challenges, but these issues are not the primary driver.

Infrastructure and Maintenance: Used to describe projects that are primarily driven by a need to address an infrastructure or maintenance need. Program may benefit, but is not the primary driver.

Net New Space: Used to describe a project that will add new space rather than substantially renew existing space. Choose “Net New Space – Infrastructure” for those projects that support utilities or other infrastructure systems (e.g., Solar Farms, pump houses, substations) and are not meant to be occupied by people.

Administrative Systems: Used to describe projects that develop and implement or improve administrative systems. May be used by units but most typically used by CIT.
**Lease:** Used for all submissions for capital leases.

**Uncertain Solution - Program:** May be used when the solution is completely unidentified and may not be under consideration for a while. Typically, projects in this category should advance into Planning for consideration in the one-year capital budget and five-year capital plan.

**Time Periods**

<table>
<thead>
<tr>
<th>Prior Years Actuals</th>
<th>Current Year</th>
<th>Budget to Date</th>
<th>2016 - 2017</th>
<th>2017 - 2018</th>
<th>2018 - 2019</th>
<th>2019 - 2020</th>
<th>2020 - 2021</th>
<th>Next 5 Years</th>
<th>Future Years</th>
<th>Total</th>
</tr>
</thead>
</table>

**Budget to Date**

The Budget to Date field is the sum of Prior Year Actuals and Current Year spending. Consider the entire current year, as you are planning in the beginning/middle of the year.

**Prior Years Actuals**

The Prior Years Actuals field is an expandable leaf column, which references inception to date funding and spending. The application has been updated to now include, the prior year submitted actuals. Units are encouraged to review and make any necessary adjustments.

**Current Year**

The Current Year field is now divided into three parts – Current Year Actuals, Prior Year Planned and Current Year Projected. These fields reference the actual, planned and projected in-year spending. In order to gain more accuracy in our reporting, Colleges/Units should review all data held in the Prior Year Planned field and shift funding either to Current Year Projected or Current Year Actuals. **Note:** The Current Year column is an expandable leaf column. It is presented as a blue font field that is not directly editable. By selecting the hollow triangle, you will be able to see three editable columns in which data for the current planning year can be entered.

**Next 5 Years**

The Next 5 Years column is an expandable leaf column designed to allow you to enter anticipated 5-year expenditure activity.

**Future Years**

The Future Year column is an expandable leaf column, which allows planning for future capital expenditures associated with anticipated needs.

**Saving your Entries**

A ‘Save All’ icon is present on each capital request screen. It is highly recommended that you save your data to the Longview database as frequently as possible to prevent a potential loss of information.
Resume?
This feature was designed to allow the user the ability to return and update any missing fields required for submission. If a flag window appears, stating that additional data is needed on the project details or budget tab, the window below will appear:

If you would like to finish your entry at a later time, select ‘No’. If you would like to resume immediately, select ‘Yes” to be taken back into the project or need.

Delete Request:
Colleges and Administrative Units cannot delete needs and project requests. If you would like to delete a request, please email cp-help@cornell.edu, so your request(s) can be reviewed by the Director of Capital and Space Planning.

Changing Project Status
Once you have fully entered a project request or need (entering all applicable fields for both the Project/Program Details Tab and the Budget Details Tab), you can then change the status of each project request or need to reflect that it is ready for Capital Plan Review.

Accessing Change Project Status option:
To access the Change Project Status option:

1. Right-mouse click under the desired Project Request or Needs Name to access the options menu:

2. Double-mouse click to select Change Project Status:
3. Once selected an additional window will appear, Change Project Status:

![Change Project Status](image)

4. Single click in the status field, to display the following drop-down menu options:

- Proposed Need
- Capital Plan Review
- Pre-planning
- Approved – Tentative
- Approved
- Authorized
- Sub-Project
- Deferred
- Subsumed by
- Close Out
- Complete
- Anulled

**Note:** Colleges and units will only have access to change the project or need status to ‘Proposed Need’ or ‘Capital Plan Review’. All other options are for Administrative use only. If your College or Administrative Unit would like to change the status to something other than Capital Plan Review, submit a request to cp-help@cornell.edu.

5. Single click the appropriate option, typically Capital Plan Review.
6. Select ‘Next’, to close the window and return you to the Capital Planning Submission Grid.

<table>
<thead>
<tr>
<th>Status Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed Need</td>
<td>This is the initial status value for all Capital Needs during the submission process. This status should be utilized when the need and project request details and budget information are being defined.</td>
</tr>
<tr>
<td>Capital Plan Review</td>
<td>Capital Plan Review is used to identify all Capital Needs that are ready for review for the one-year capital budget and five-year capital plan.</td>
</tr>
<tr>
<td>Pre-Planning</td>
<td>This status value should only be used when a need or project is in very early discussions and may not yet be ready for publication in the one-year capital budget or five-year capital plan. It is important</td>
</tr>
</tbody>
</table>
to have the need or project in the Longview CPT, but we may want to filter and report on it differently than other, more informed projects. Projects with a status of “Pre-Planning” may have a Project Categorization of “Uncertain Solution – Program.”

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved – Tentative</td>
<td>Used during the capital project review cycle (Fall-May) to identify projects that are likely to be in the approved one-year capital budget and five-year capital plan.</td>
</tr>
<tr>
<td>Approved</td>
<td>This status value identifies all project requests approved by CF&amp;PC.</td>
</tr>
<tr>
<td>Authorized</td>
<td>This status value identifies all projects that are active and authorized to spend through the PAR process.</td>
</tr>
<tr>
<td>Sub-Project</td>
<td>A project that is one of several included in a portfolio or other master project listed in the one-year capital budget and/or five-year capital plan. Sub-projects might be executed as discrete projects within the larger program Sub-projects cannot be identified as the capital planning project in PARs beyond FY18. The capital plan line and budget for any subproject will be the portfolio that the subproject was rolled into, or a capital plan variance if not identified in a portfolio.</td>
</tr>
<tr>
<td>Deferred</td>
<td>This status value identifies projects that are deferred in time due to prioritization, sequencing, or other timing issues.</td>
</tr>
<tr>
<td>Subsumed by</td>
<td>Used to designate a need or project that has been addressed or will be addressed by another capital plan project, but not as a discrete phase or sequence within another project. Subsumed should never be applied to a new entry in Longview, but only to existing entries that can go away as individual rows (entries) because of some other project that is taking the lead for the scope of work identified in the subsumed project.</td>
</tr>
<tr>
<td>Close Out</td>
<td>Identifies a project for which the scope of work and the expenditures are substantially complete, with the end of the project work and expenses completing in the one-year capital budget. Projects with no further PARs required should go into Close Out unless the remaining active work will extend beyond the upcoming fiscal year. For example, FY18 projects of limited duration and relatively small budgets with all authorizations completed should likely be put into Close Out when submitting the FY19 projects, while a large project in construction for several years should remain in Authorized status until the construction phase is expected to wind down in a future year fiscal year.</td>
</tr>
<tr>
<td>Complete</td>
<td>Identifies a project with both a completed scope of work and completed expenditures. Accounts for these projects should be closed by the start of the upcoming fiscal year (i.e., July 1st of the one-year capital budget year).</td>
</tr>
<tr>
<td>Annulled</td>
<td>Applied to a need or project already in Longview that has gone away (need) or is never going to happen (project). Only applied to projects that units would like to delete.</td>
</tr>
</tbody>
</table>
Filtering Capital Data

Longview CPT includes two filter capabilities for your reporting needs.

Using Filter Requests

Filtering requests allows you to narrow down your submissions for a more specific review.

1. To apply a new filter, select the Filter Requests Icon, located within the toolbar, in the upper left corner:

2. Once selected, the Filter Requests window will display:

3. To filter the project requests or needs there are three options:
   a. Enter Numeric
   b. Use Pull-Down Menu
   c. Use Search Icon

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Project Cost &gt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Total Project Cost &lt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Net Present Value (Leases) &gt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Net Present Value (Leases) &lt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Project Status</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Submitting Unit</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Responsible Unit</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Phase</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Sources</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Capital Uses</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Timing</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Estimated Completion Year</td>
<td>Pull-Down Menu</td>
</tr>
</tbody>
</table>

Note: Each filter request is unique to itself. If you would like to remove your existing search criteria, simply select the Filter Request Icon and a new 'Filter Request' window will display.
Using Data Table View:
Data Table View provides the same capability as the Filter Request option, but holds some additional features, which are outlined below.

4. To apply a new filter, select the Data Table View Icon, located within the toolbar in the upper left corner:

5. Once selected, the Filter Requests window will display:

6. To filter the project request or needs there are three options:
   a. Enter Numeric
   b. Use Pull-Down Menu
   c. Use Search Icon

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Project Cost &gt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Total Project Cost &lt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Net Present Value (Leases) &gt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Net Present Value (Leases) &lt;</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Project Status</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Submitting Unit</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Responsible Unit</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Phase</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Strategic</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Sources</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Capital Uses</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Timing</td>
<td>Search Icon</td>
</tr>
<tr>
<td>Estimated Completion Year</td>
<td>Pull-Down Menu</td>
</tr>
</tbody>
</table>

Note: Each filter request is unique to itself. If you would like to remove your existing search criteria, simply select the Filter Request Icon and a new 'Filter Request' window will display.
If you would like to see your full data set, simply select OK for the Data Table View to load.

Data Table View Features:

The data table view works similarly to Excel, allowing you to ‘Group By’ a selected field, filter the data within the view, hide columns as well as drag and drop columns of choice.

1. Within the Data Table View, enter your search criteria, and then select the Group By menu in the upper left Corner:

2. Next, select the fields you would like to group your data by, by single-clicking the field name. (The example below was sorted by Status):
3. If you would like to change the grouping, simply reselect the menu and select another field.

Adding a Filter:
The filter capability within the Data Table View works just like Excel. To filter the columns, take the following steps:

1. Select the filter icon in the toolbar:

![Filter Icon](image)

2. To filter the desired column data, hover over the column of choice, so it is highlighted in blue and a downward arrow displays:

![Project Priority Filter](image)

3. Click on the arrow, to display the available options:

![Filter Options](image)

4. Choose the desired options by checking or unchecking the boxes and select OK to load.

Removing a Filter:
To remove the filter, take the following steps:

1. Select the Remove Filter Option, next to Filter, to return the data table back to its previous state.

![Remove Filter Icon](image)

*Please note: If you are utilizing other options such as Group by or Drag and Drop, these features will remain intact.*

Drag and Drop:
The Drag and Drop feature allows you to rearrange the columns to your liking. To make use of this feature, take the following steps:

1. Hover over the column of choice, so it is highlighted in blue:
2. Holding down the left-mouse click begin to drag the field, to the left or right using the dark blue line that displays as your guide:

![Drag Field](image)

3. Once you have found your new field location, simply release the left-mouse click and the field will drop into the new desired location.

**Hiding Columns:**
The Data table view is full of information; if you would like to work with a smaller data set, you can utilize the hide feature. To hide columns, take the following steps:

1. Hover over the desired field, so it displays in blue:

   ![Hover Field](image)

2. Right-mouse click to display the ‘Hide’ option:

   ![Hide Options](image)

3. Single-Click ‘Hide’ to hide the column selected.

4. Similarly, take the above steps to ‘Unhide’ the columns:
Export Capital Data Application

The Export Capital Data application is an application designed to allow users the ability to export all Capital Requests and Proposed Needs at the College or Administrative Unit level.

Launching the Export Capital Data Application

1. To begin, single click the Export Capital Data Link:

   ![Capital Planning Apps]

   - Capital Planning - Version 3
   - Export Capital Data

2. This will launch the Export Capital Data Selector window:

   ![Export Capital Data Selector Window]

3. To search for your College or Administrative Unit, use the Search Icon to navigate the hierarchy. Refer to Using the Search Icon, on page 6, for further details.

4. Once you have selected the appropriate College or Administrative Unit, use the pull-down menu to select the appropriate Time Period. This field is pre-set to the current Base Budget.

5. Select Next to begin the export process to Excel. For FY2019 and future planning, the application will export one “.txt” file one for your college or units’ project requests and needs. For historical data (FY2018 and prior), this application will export two separate “.txt” files, one for your college or units’ project requests and needs and one for the space data associated with the projects. The .txt files will be located on your desktop under Documents -> Longview -> CapPlan_Export. The .txt files will be located in the History folder and can be identified with the following formats:

   ![Capital Planning_C_2000_R and Space_C_2000_R]

   Note: Planning Years: FY2016 – FY2018 are the only years that will export a space file, going forward this will no longer be included.
Viewing the Export Capital Data Application Data

To access the data from the Export Capital Data Application, please follow these recommended steps:

1. From your desktop, Open your Documents Folder, to view your Longview Folder:

![Documents Folder Screenshot]

2. From your Documents Library, select Longview, then the appropriate environment (CornellPRD)

![Documents Library Screenshot]

3. Within the CornellPRD folder, select CapPlan_Export

![CapPlan Export Screenshot]

4. Select the file you would like to view, either Capital_Planning or Space_ (See Page 37 bullet 5 for more details)

5. To select all, use Ctrl A, then Ctrl C to copy the data.

7. In the upper left-hand corner, select the paste drop-down menu to select Use Text Import Wizard.

8. For Step 1 of the Wizard, verify that Delimited is selected and Select Next to continue:
9. For Step 2 of the Wizard, select Other and use the Open Curley Bracket ({}), to align the columns, then select Next:

![Test Import Wizard - Step 2 of 3]

10. For Step 3 of the Wizard, verify that General is selected and select Finish to view your data in an Excel spreadsheet:

![Test Import Wizard - Step 3 of 3]

*Please Note: It is recommended that you save a separate copy of your data in a location of choice for future reference.*