Longview Capital Planning Tool (CPT) Quick Reference Guide

How to perform essential tasks in Longview CPT

September 2022
# Table of Contents

**TABLE OF CONTENTS** ................................................................................................................... 1

**CAPITAL PLANNING BASICS** ...................................................................................................... 4

Annual Capital Planning Cycle ............................................................................................... 4

Overview of Longview CPT Submissions ................................................................................. 4

**GUIDELINES FOR LONGVIEW CPT SUBMISSIONS** ............................................................... 5

Project Portfolios ..................................................................................................................... 5

Project Categorizations ........................................................................................................... 8

**LONGVIEW CAPITAL PLANNING TOOL (CPT) BASICS** ....................................................... 9

Accessing Longview CPT ......................................................................................................... 9

Longview Plan - Home Page .................................................................................................... 11

Longview CPT Portal ............................................................................................................... 12

Setting Workspace View ......................................................................................................... 13

Configuring Workspace Layout ............................................................................................. 13

**GENERAL NAVIGATIONAL FEATURES** ................................................................................. 15

Fields Types Found in Longview CPT ................................................................................... 15

Pull-Down Menus ................................................................................................................... 15

Editable Cells ......................................................................................................................... 15

Expandable Leaf Columns or Rows ....................................................................................... 16

Using the Search Icon ............................................................................................................ 16

Navigate the Hierarchy Manually .......................................................................................... 17

Navigate the Hierarchy using Drill Down ............................................................................. 18

Navigate the Hierarchy using Text Search ............................................................................ 18

**CAPITAL PLANNING APPLICATION** ....................................................................................... 20

Launching the Capital Planning Application ........................................................................ 20

Organizational Approach ....................................................................................................... 21

Capital Views ......................................................................................................................... 21

Data Grid Display .................................................................................................................. 21

Navigating the Responsible Hierarchy .................................................................................. 22

**CAPITAL PLANNING SUBMISSION GRID** ............................................................................... 23

Adding a Request .................................................................................................................... 25

Viewing Project Details ......................................................................................................... 26

Adding Comments .................................................................................................................. 26

Adding Attachments ............................................................................................................... 27

**CAPITAL PLANNING PROJECT DETAILS TAB** ..................................................................... 30

Reference Information ............................................................................................................ 30

Overall Information ............................................................................................................... 31
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Relationship Information</td>
<td>33</td>
</tr>
<tr>
<td>Status Information</td>
<td>33</td>
</tr>
<tr>
<td>Maintaining the Capital Budget/Plan Year(s) Field</td>
<td>34</td>
</tr>
<tr>
<td>Maintenance Information</td>
<td>35</td>
</tr>
<tr>
<td>Alignment Information</td>
<td>35</td>
</tr>
<tr>
<td>Space Information</td>
<td>36</td>
</tr>
<tr>
<td>Review Information</td>
<td>36</td>
</tr>
<tr>
<td>Timing Information</td>
<td>37</td>
</tr>
<tr>
<td>Sources - Capital Uses Information</td>
<td>37</td>
</tr>
<tr>
<td>CAPITAL PLANNING BUDGET DETAILS TAB</td>
<td>38</td>
</tr>
<tr>
<td>Navigating the Budget Tab</td>
<td>38</td>
</tr>
<tr>
<td>Capital Planning Sources</td>
<td>38</td>
</tr>
<tr>
<td>Capital Uses</td>
<td>40</td>
</tr>
<tr>
<td>Time Periods</td>
<td>41</td>
</tr>
<tr>
<td>FINISHING YOUR CAPITAL SUBMISSIONS</td>
<td>42</td>
</tr>
<tr>
<td>Saving your Entries</td>
<td>42</td>
</tr>
<tr>
<td>Resume?</td>
<td>42</td>
</tr>
<tr>
<td>Delete Request</td>
<td>42</td>
</tr>
<tr>
<td>Changing Project Status</td>
<td>42</td>
</tr>
<tr>
<td>Accessing Change Project Status option</td>
<td>42</td>
</tr>
<tr>
<td>FILTERING CAPITAL DATA</td>
<td>46</td>
</tr>
<tr>
<td>Using Filter Requests</td>
<td>46</td>
</tr>
<tr>
<td>Using Data Table View</td>
<td>47</td>
</tr>
<tr>
<td>Data Table View Features</td>
<td>47</td>
</tr>
<tr>
<td>EXPORT CAPITAL DATA APPLICATION</td>
<td>52</td>
</tr>
<tr>
<td>Launching the Export Capital Data Application</td>
<td>52</td>
</tr>
<tr>
<td>Viewing the Export Capital Data Application Data</td>
<td>53</td>
</tr>
<tr>
<td>AUDIT REPORTS</td>
<td>54</td>
</tr>
<tr>
<td>Approved Audit</td>
<td>54</td>
</tr>
<tr>
<td>Authorized Status</td>
<td>55</td>
</tr>
<tr>
<td>Capital Plan Review Status</td>
<td>55</td>
</tr>
<tr>
<td>Close Out Status</td>
<td>55</td>
</tr>
<tr>
<td>Complete Status</td>
<td>56</td>
</tr>
<tr>
<td>Pre-Planning Status</td>
<td>56</td>
</tr>
<tr>
<td>Proposed Need Status</td>
<td>56</td>
</tr>
<tr>
<td>Sub-Project Status</td>
<td>56</td>
</tr>
<tr>
<td>Subsumed By Status</td>
<td>56</td>
</tr>
</tbody>
</table>
Deferred Status ....................................................................................................................... 57

ACCESSING REPORTS IN LONGVIEW .................................................................................... 58
  Launching Capital Reports .................................................................................................. 58

LONGVIEW ADD-IN FOR OFFICE ......................................................................................... 61
  Source and Use Data Extract ............................................................................................. 61
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. Coordinated planning for capital needs as issues and opportunities emerge;
2. Maintaining a prioritized list of needs that can shape the capital plan and planning decisions in future years, and
3. Aligning 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 a level of detail to create a meaningful one-year capital budget.

Annual Capital Planning Cycle

The formal annual capital planning cycle typically begins in September 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 September and October for the development of the annual Capital Budget and Five Year Capital Plan. After this timeframe, the development of draft reports will ensue as well as progress discussions with the units. All submissions are expected to be substantially complete for central review by the October deadline.

The Division of Budget and Planning then drafts the annual capital budget and the five-year capital plan from the CPT submission data, for presentation to the Finance Committee 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 in May to the full Board and included in the Operating & Capital Budget Plan.

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 Facilities & Campus Services (FCS) regarding scope, budget and timeline, if such discussion has 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 many will require updated descriptions, schedules, or budgets if they remain active as intended projects. Every existing entry should be reviewed from year to year.
Guidelines for Longview CPT Submissions

All capital needs and projects with an estimated budget 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 budget.

In general, the capital plan focuses on strategic renewal. 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. That is, needs should be identified even if funding is uncertain.

Other criteria of importance in identifying priority needs include 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. FCS 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 should be entered under “Unidentified Funding Source” 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, the amount the unit wants to apply to debt should be entered under “Unidentified Funding Source” 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 project for the five-year capital plan. For each submission, the previous one-year project rolls off 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 Portfolio 2021
(one-year budget, will roll off and be replaced by CLES Cyclical Housing Upgrades 2022)

*Note: Each year a new request should be added into the Capital Planning application, for inclusion in the annual capital budget. Previous Year Submissions, should be moved to the status, “Close Out” for tracking against the current year budget.*

CLES Cyclical Housing Upgrades Portfolio 2022-2025
(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 2023-2026)

*Note: The Year 2-5 Portfolio rolls forward each year and can be updated by adjusting the fiscal years as outlined above. A new submission should NOT be created, unless you are creating a brand new portfolio, not previously submitted.*

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

CVM Academic Program Renovations 2022
CVM Academic Program Renovations 2023-2026

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

CVM Renovations for New Faculty Hires 2022
CVM Renovations for New Faculty Hires 2023-2026

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 CPT as stand-alone projects as soon as they proceed through the approvals process with a confirmed estimated total project budget is equal to or greater than the value of one million dollars ($1,000,000). Projects under a million dollars will be reviewed by the University Budget Office but will be left at the College/Unit’s discretion for tracking and entry into the Longview Capital Planning Tool. Examples of portfolio management for projects ≥ $250,000 are held on pages 7 and 8.

That is, when a project budget is ≥ $1,000,000 initiated out of a portfolio:

- The first PAR will identify the fund source as the portfolio.
• The first PAR will also identify the name of a new project in Longview CPT that is specific to the Project.
• Subsequent PARs will refer to the new project in Longview CPT as the appropriate capital plan line.

As much as possible, the unit should revise Longview CPT entries. When the system is closed during periods of system development or capital plan preparation, the unit will work with University Budget Office staff to make appropriate revisions in Longview CPT.

Portfolio Management Examples:

College A has a Portfolio, College A Academic Program Renovations FY20, with an estimated total project budget of $2M. College A starts undertaking a series of small projects and manages them as identified here. Implications for Longview CPT and managing the capital plan are noted in italics.

1. Budget < $250,000. Creation of gender neutral restroom and reconfiguration of adjacent spaces ($150,000). This project is designed and constructed within the FY20 cycle. The Design PAR and Construction PAR both reference the College A Academic Program Renovations FY20 capital plan project. Because the budget is under $250,000, a new stand-alone project is not needed.

2. Budget < $250,000. Installation of flat panel monitors ($180,000). This project is designed and constructed within the FY20 cycle. Design PAR and Construction PAR both reference the College A Academic Program Renovations FY20 capital plan project. Because the budget is under $250,000, a new stand-alone project is not needed.

3. Budget > $250,000, set to close out. New student collaborative space ($280,000). This project is initiated with a design approval in December 2019. The college expects to receive construction approval in May 2020 and plans to construct the project in the summer of 2020 (FY21). The Design PAR references the College A Academic Program Renovations FY20 capital plan project for initiating the design work. The Design PAR also states that a new project has been established in Longview CPT, “College A New Student Collaborative Space.” The unit enters the College A New Student Collaborative Space project in Longview CPT, with appropriate sources and uses and adjusts the original College A Academic Program Renovations FY20 project accordingly. The status of this new project is immediately set to close out, because no further approvals are required beyond FY20. The Construction PAR references the College A New Student Collaborative Space project.

4. Budget > $250,000, set to authorized. Lecture hall refurbishment and technology ($900,000). This project is initiated with a design approval in April 2020 and the college realizes that it can’t construct the refurbishment until the summer of 2021. The Design PAR references the College A Academic Program Renovations FY20 capital plan project for initiating the design work. The Design PAR also states that a new project has been established in Longview CPT, “College A Lecture Hall Upgrade.” The unit enters the College A Lecture Hall Upgrade project in Longview CPT, with appropriate sources and uses and adjusts the original College A Academic Program Renovations FY20 project accordingly. The status of this project is immediately set to authorized, because this project will remain active into at least FY22 and it
needs to appear in the FY21 capital plan. The Construction PAR references the College A Lecture Hall Upgrade project.

5. **Budget > $250,000, set to authorized, with a capital plan variance and then a project budget variance.** Classroom renovations ($1,000,000). This project is initiated in April 2020 after the other four projects have received approvals. The college plans to design renovations for four classrooms and then construct them in the summer of 2021 (FY22) with a construction PAR expected in April 2021. The Design PAR references the College A Academic Program Renovations FY20 capital plan project for initiating the design work and states that a new project has been established in Longview CPT, “College A Classroom Renovations.” The Design PAR also seeks a capital plan variance, because College A has now exceeded its $2M budget for FY20.

The unit enters the College A Classroom Renovations project in Longview CPT, with appropriate sources and uses and adjusts the original College A Academic Program Renovations FY20 project accordingly. The status of this project is immediately set to authorized, because this project will remain active into at least FY22 and it needs to appear in the FY21 capital plan.

During the project, unforeseen conditions arise that increase the estimated total project budget to $1.25M. The Construction PAR references the College A Classrooms Renovations project and requests a project budget variance. The first preference is to fund the variance from the College A Academic Program Renovations FY21 project if at the time of construction approval funds remain in this project line. If not, the College must select another capital plan project as the source of project funds, if at all possible. If the College does not have any FY21 capital plan projects to apply to the budget variance for the classroom renovations project, then the PAR needs to request a capital plan variance.

### 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 & Design.” 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 & Design phase will roll into a one-year capital budget while the second phase remains in the five-year capital plan (year 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>Balch Hall Planning and Design (Planning &amp; Design)</td>
<td>Balch Hall Renovation (Building Renewal)</td>
</tr>
<tr>
<td>McGraw Hall Planning and Design (Planning &amp; Design)</td>
<td>McGraw Hall Renovation (Building Renewal)</td>
</tr>
</tbody>
</table>
Longview CPT is a web application that Cornell academic and administrative units employ to inform development of 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 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 included in Longview CPT are evaluated on a regular basis. Units are welcome to provide input regarding fields that are difficult to complete as well as those that they would like to include and this input will be taken into consideration to inform future system development.

The system requires the use of Microsoft Edge or Internet Explorer (IE) version 11. See Using Longview Budget and Capital Planning in Edge.

Accessing Longview CPT
Launching your web browser and accessing the Longview CPT system:
1. Open your Microsoft 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 CUWebLogin page appears, enter in your NETID and Password to be directed to the Longview Group page.

From the Longview Group page, choose either the Capital Planning Group (CapitalPlanning) or Capital Reviewer Group (CapitalReviewer), depending on security access, to access and launch Longview Plan.
Using Longview Budget and Capital Planning in Microsoft Edge:

1. Launch your Microsoft Edge 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).

   **Note:** You may need to make Microsoft Edge your default browser, instructions are below, or you can copy and paste the link into your Microsoft Edge browser.

2. Login and choose appropriate group.

3. After clicking the “Longview Plan” box, you will be directed to another window, seen below.

4. Click “Open” to continue launching the application.

   **Note:** There will be a blank untitled screen on your browser after you have fully launched the application. It can be closed once inside the application portal.

**Making Microsoft Edge your default browser:**

1. Click the Start button in the lower left corner of your screen.

2. Select Settings.

3. Select Apps.

4. Select Default apps.

5. Under Web browser, select the current browser listed and then select Microsoft Edge.

Longview Plan - Home Page

After successfully authenticating with Longview CPT, you will be presented with the Longview Plan home page, which has been customized for your level of access. The Plan page is set up in a tile like format, similar to Windows 10 and should **ONLY** be used to launch the Longview Plan tile for access to the Longview CPT Portal.
Longview CPT Portal

Once launched, you are at the dashboard display. The options for selection are aligned to the left. Hover over letters to display menu option titles and to navigate menu. Once menu option is selected, double click on desired link to launch application, which will display as a tab to the right of the menu display.

Tasks you can carry out from the portal include:

1. Set your workspace view (see next section).
2. 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 review and manipulation in Excel.
3. Access any standard report templates that have been made available to you.
   
   Note: Audit and Budget Detail reports can be found under letter “R”, Reports, navigate to appropriate report via the following path, Capital -> Analysis and Reporting -> Audit Reports or Capital Budget Detail. For more information on Reports, see Audit Reports on page 54.
4. Review supportive documentation.
5. Access Longview Launch Center for links for Excel and Longview Analysis and Reporting.
Setting Workspace View
The Longview Portal offers the *option* of saving your workspace view. A user can now launch their frequently used applications and save the layout to automatically launch the applications when opened, storing the navigation through categories and links. To save your workspace view, take the following steps:

1. Navigate through the categories on the left and select the categories, holding the applications you want to launch.
2. The applications will organize in the order of selection.
3. Once, the applications are launched, navigate to the upper left corner of the Longview CPT portal and click on the three bars (image below).

4. The below menu will populate and present your options:

5. Select Save workspace layout.
6. If you would like to revert back to the original layout, select Revert to saved workspace.

Configuring Workspace Layout
1. Once you have set your workspace layout, right-mouse click on a tab within your workspace view to display the menu to the right:
2. From this menu, you can access options to either close “All Tabs” or “Other Tabs” from the one you have selected.
3. Lastly, you can access options to Split Workspace Vertically (Image A) or Horizontally (Image B).
General Navigational Features

Fields Types Found in Longview CPT

Based on the way Longview CPT 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 Details Tab section (starting on page 30).

a. Text Fields
b. Text/Numeric fields
c. Numeric fields
d. Autofill fields
e. Pull-Down Menu fields
f. Administrative Use Only fields
g. Integrated Field - New
h. Integrated Pull-Down Menu field - New

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 display the field’s 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, integrated fields or pull-down menus. Blue font fields can also represent...
total fields for “parent” columns or “parent” rows which requires you to expand the total field(s) to edit the information within. (See next section, Expandable 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 black shaded triangle (.expand icon), this is an expandable field, whether it be a row or column. Clicking on the black shaded triangle icon (.expand 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 23 for further details). By clicking the black shaded triangle icon (.expand icon) to the left of the text Gifts Funds, five additional “children” columns open for review: NO - Gifts Cash, Transfer In - from Plant Gift, Transfer In - from Restricted Gift - RGGIFT, Pledge payments - Capital Budget and Gifts to be Raised - Capital Budget (see images below). To re-collapse these fields simply click the black triangle (collapse icon) 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 application. 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:

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 red “-“icon ( ).

[Symbol Selector window with options to navigate manually or search for entries]
2. Select the OK button to proceed with the selection.

Navigate the Hierarchy using Drill Down
Using “Drill down” for your search:
1. Click on the black shaded icon (▼) to the left of the organization. This will expand the hierarchy one level, and tipping it over (▶). Continue to click the black 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 (see image on the next page).
3. Ensure the College or Unit you want is in the Selected Symbol tab with a red “-” icon (–).
4. Click the OK button to proceed with that selection.

Note: Drill down functionality is only available when searching the responsible hierarchy, see Navigating the Responsible Hierarchy, page 22.

Navigate the Hierarchy 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 Link](image)

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

   ![Update Capital Projects Window](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, it 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 Capital Planning Submission Grid below on page 23).

Some Units such as Facilities and Campus Services (FCS) and Student & Campus Life (SCL) have more complex organizational and funding structures that 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.

*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 Facilities and Campus Services (FCS) may submit on behalf of other Colleges/Units for FCS 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 16 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 the next section 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.

Capital Planning Submission Grid

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 on page 25, 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 Requests 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 upcoming fiscal year.

   *Note: The system has been updated to display the current planning year on the “1 Year Requests” tab (e.g. FY2022 Requests).*

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 click under the desired project name to display the following options:

   **Feature:** | **Description:**
   --- | ---
   Cut: | Cut the contents of a cell, to be placed in another cell.
   Copy: | Copy the selected cell’s content.
   Paste: | Paste values from the clipboard into a cell.
   Freeze: | Use Freeze to Freeze the screen in place, right click to Unfreeze.
   Attachments: | See Adding Attachments on Page 27.
   Duplicate Request: | This feature allows you to duplicate the previously entered request or any selected request, if necessary.
   Change Project Status: | See Changing Project Status on Page 42.
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. Please note: You must enter a value for Estimated Total Budget. This can be a rough estimate (order of magnitude) if the planned solution is in early development.
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 (for additional details on Using the Search Icon see page 16).

Also Note: When you “Add a Capital Request”, the name that displays in RED is the identifier for the “Submitting Unit”.
**Viewing Project Details**

1. Next to the “Project Name”, underneath the column, “Project Priority” 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 Request Screen**

**Adding Comments**

1. To add a Comment to a project request, you will need to utilize the right click menu options as follows:
   a. Right mouse-click on desired area with in project to display menu:

   ![Right Click Menu]

   b. Select Comments… menu option
c. The Comments window will display:

![Comments window](image)

d. Left- mouse click on the word comments in the blue area to begin adding your comment.
e. If multiple comments are needed, select the Comments button in the upper left hand corner.
f. To load the comments and to exit the window, select OK.
g. To exit without adding a comment, select Cancel.

### Adding Attachments

1. To add an attachment to a project request, you will need to utilize the right click menu options as follows:

   a. Right mouse-click on desired area with in project to display menu:

   ![Right click menu](image)

   b. Select Attachments… menu option
c. The attachments window will display:

![Attachments Window]

- On the top left corner, select the Attachments button, which will launch your file search to search your local machine:

![File Search Window]
e. Once the file is located, click to select, then select Open to load the file into Longview.
f. Select OK, to attach file and exit screen.
g. If you no longer wish to add an attachment, select Cancel, to exit the window.
h. If the steps a-f were completed, a paperclip will be visible in the field you attached your document too.
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 sections based on similar types of information that describe 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 project identifier fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Identifier</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Longview Project Identifier</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Project Categorization</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Project Classification</td>
<td>Pull-Down Menu (Admin Only)</td>
</tr>
<tr>
<td>PAR# (Use semicolons between numbers)</td>
<td>Text/Numeric Field</td>
</tr>
<tr>
<td>eBuilder Number(s)</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>eBuilder Project Status</td>
<td>Integrated Pull-Down Menu</td>
</tr>
<tr>
<td>eBuilder Project Phase</td>
<td>Integrated Pull-Down Menu</td>
</tr>
<tr>
<td>eBuilder Project Type</td>
<td>Integrated Pull-Down Menu</td>
</tr>
<tr>
<td>KFS Project Account Number</td>
<td>Integrated Field</td>
</tr>
</tbody>
</table>

1. Campus Identifier: Drop-down menu used to identify campus in which the project resides. This field is automated based on your org selection.
2. Longview Project Identifier: This field is for Administrative Use Only. Starting with the FY19 Capital Budget, all approved projects have been assigned a project identifier number. This identifier number should be included in PAR submissions and entered in the supporting e-Builder field, Longview ID.
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. Project Classification: Admin Only field used to prepare annual capital budget.
5. PAR #: Enter the text PAR or S-PAR followed by the number, if applicable (e.g., PAR33201401; S-PAR33201401).
6. eBuilder Number(s): Enter the project number in eBuilder, if applicable.
7. eBuilder Project Status: Integrated Pull-Down Menu that will be populated from university system e-Builder. This field will only be populated for projects that hold an active e-Builder Number. Projects that hold multiple e-Builder numbers, namely portfolio and/or master projects will not be updated. The purpose of this field is to align university reporting. The field is restricted to Administrative use and cannot be changed by the user. 
   Current menu options include: Active, Administrative, Cancelled, Closed, Inactive, Planned, Hold & Reassess.
8. eBuilder Project Phase: Integrated Pull-Down Menu that will be populated from university system e-Builder. This field will only be populated for projects that hold an active e-Builder Number. Projects that hold multiple e-Builder numbers, namely portfolio and/or master projects will not be updated. The purpose of this field is to align university reporting. The field is restricted to Administrative use and cannot be changed by the user.
Current menu options include: Pre-Design, Design, Construction, Closeout and Complete.

9. eBuilder Project Type: Integrated Pull-Down Menu that will be populated from university system e-Builder. This field will only be populated for projects that hold an active e-Builder Number. Projects that hold multiple e-Builder numbers, namely portfolio and/or master projects will not be updated. The purpose of this field is to align University reporting. The field is restricted to Administrative use and cannot be changed by the user.


KFS Project Account Number: Integrated field that will be populated from university system e-Builder. This field will only be populated for projects that hold an active e-Builder Number. Projects that hold multiple e-Builder numbers, namely portfolio and/or master projects will not be updated. The field is restricted to Administrative use and cannot be changed by the user.

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>eBuilder Project Name</td>
<td>Integrated 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>

1. Project Name: Please enter the name of the project. The name of the project should be consistent with any other activity or requests related to the project, such as PARs, S-PARs, etc. For programmatic needs that do not yet have a solution in terms of a defined project, identify the need with a name (e.g., Meeting My Academic Unit Space Need). When a project is developed from this need, this name should be updated to be consistent with all other related activity or requests. **Note: See Guidelines on page 5 for Portfolio naming.**

2. eBuilder Project Name: Integrated field, that will be populated from university system e-Builder. This field will only be populated for projects that hold an active e-Builder Number. Projects that hold multiple e-Builder numbers, namely portfolio and/or master projects will not be updated. The field is restricted to Administrative use and cannot be changed by the user.

3. Submitting Org Code: The appropriate Org Code of the submitting unit you represent will autofill into this field.

4. Submitted By: The corresponding Description Name of the Org Code will autofill into this field.

5. College/Unit Org Code: The Org Code of the Responsible Unit will autofill into this field.
6. College/Unit Name: The corresponding Responsible Unit Description Name will autofill. If you would like to select another College/Unit as the Responsible Unit, see page 16 “Using Search Icon” for details.

7. Facility Code: Enter the appropriate facility code(s), separate by a semicolon (;) if the project or need will address multiple buildings.

8. Description: Please describe the need or project in full detail. If additional space is needed, please include an attachment to your project request, see “Adding an Attachment.” The example below illustrates the type of information that should be included. Colleges/Units are encouraged to include as many details as possible in order to best inform capital plan decision-making.

   This project will repurpose Noyes Lodge (facility code 3126) into a new Visitor Center for the Ithaca campus. After extensive analysis, Noyes Lodge was identified as the optimal site for this purpose, given project goals as well as cost constraints. However, the existing Noyes Lodge occupant, the Language Resource Center, will need to be relocated on campus before Noyes Lodge can be repurposed as a Visitor Center. The relocation of the Language Resource Center is being addressed as a separate capital project submission.

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.
Project Relationship Information
This section identifies information, as relevant, to relate projects in the database to one another.

The project relationship information section includes the following fields:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio Name</td>
<td>Text Field</td>
</tr>
<tr>
<td>Related Master Project</td>
<td>Text Field</td>
</tr>
<tr>
<td>Related Sub-Project(s)</td>
<td>Text Field</td>
</tr>
<tr>
<td>Subsumed By</td>
<td>Text Field</td>
</tr>
<tr>
<td>Enabling Project Notes</td>
<td>Text Field</td>
</tr>
</tbody>
</table>

1. Portfolio Name: For units maintaining sub-projects in the system, enter the supporting portfolio name that the sub-project(s) roll-up to. The portfolio name listed in this field should tie directly to the portfolio that will be submitted for approval in the one year budget or five year plan (see pages 5-8 for additional detail).
2. Related Master Project: A master project is a project of large scope, scale and budget managed as one entity in the capital plan. The only two recent examples of master projects are Cornell Tech Roosevelt Island Campus and North Campus Residential Expansion. Units would not normally ever be creating a master project without direction from senior administration.
3. Related Sub-Project(s): For all Portfolio or Master Projects, enter in the names of the supporting sub-project work, which are included in the portfolio budget.
4. Subsumed By: Used to designate a need or project that will be addressed by another capital plan project (referred to as the lead project), but not as a discrete phase or sequence within another project. Enter the name of the lead project, via the copy and paste function.
5. Enabling 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.

Status Information
This section identifies information about the status 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>Estimated Total Budget</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Approved Capital Budget</td>
<td>Admin Only Field</td>
</tr>
<tr>
<td>Estimated Total Project Cost</td>
<td>Numeric 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>
</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”. **Note:** For programs without identified solutions and budgets, you will need to submit a request to cp-help@cornell.edu for the status value to be changed to Capital Plan Review.

4. Approved Capital Budget: Admin Only field, used to capture the prior year approved capital budget amount.

5. Estimated Total Project Cost: For projects in the statuses Authorized, Close-Out and Complete, enter the Estimated Total Project Cost. The amount held in this field should align with the Estimated Total Project Cost in eBuilder. This field will be used to track budget variances.

6. 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; year 2-5 portfolios that roll from one year to the next are Ongoing.

7. 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. Inclusion in the capital budget/capital plan constitutes a fiscal approval and does not constitute specific project approval; projects are approved for activity (scope and financial authorization) through appropriate Project Approval Request process. (See Maintaining the Capital Budget/Plan Year(s) field for additional detail below).

8. 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 year 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.

9. 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 year 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.

**Maintaining the Capital Budget/Plan Year(s) Field:**

**One-Year Capital Budget**

After the Trustee meeting in May, the University Budget Office (UBO) will assign the upcoming fiscal year (i.e., the capital budget year, e.g., FY2021) into the Capital Budget/Plan Year(s) field, to all approved projects. This fiscal year identifier, marks the first year the project was approved in the Capital Budget. If the project is resubmitted in the following submission cycle the fiscal year entered in the Capital Budget/Plan Year(s) field will not change.

**Five-Year Capital Plan**

Projects reviewed by the Trustees for the five-year Capital Plan will be assigned the associated four year range (year 2-5) reflecting the capital budget year (e.g., FY2022-2024 for the FY2021 capital budget year). Portfolio project records included in year 2-5 of the five-year plan should be reviewed
and updated by the unit to support the rolling fiscal year range and be resubmitted during each submission cycle. These updated portfolios, once reviewed for the Upcoming Five Year-Plan, will be adjusted to the next year 2-5 range by the UBO. For example, if the portfolio was included in the FY2022-FY2025 capital plan, the Capital Budget/Plan Year(s) field will change to the next year 2-5 range, (e.g., FY2023-2026).

Projects submitted into the one-year capital budget that are broken out of a portfolio or that were previously stand-alone projects in the Five Year Capital Plan will be reviewed and if approved, assigned the upcoming capital budget year by the University Budget Office.

**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>Estimated Incremental Annual O&amp;M</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Estimated Maintenance Backlog Addressed</td>
<td>Numeric Field</td>
</tr>
</tbody>
</table>

1. 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.

2. 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”. Note: Please contact Facilities & Campus Services - 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>Campus Master Plan Zone</td>
<td>Pull-Down Menu</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: 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 FCS ONLY: FCS 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, 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 and unit 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.”

**Space Information**
The fields in this section identify the building area impacted by the project or need. If the capital activity is unrelated to a facility, please enter “0”.

**The Space Information section includes the following fields:**

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space Notes</td>
<td>Text Field</td>
</tr>
<tr>
<td>Swing Space (Sq. Ft.)</td>
<td>Numeric Field</td>
</tr>
<tr>
<td>Vacated Space (Sq. Ft.)</td>
<td>Numeric Field</td>
</tr>
</tbody>
</table>

1. 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.

2. Swing Space: Please enter an estimate of the total square feet required or leave as default value of “0”, if not applicable.

3. 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.

**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 fields:

1. Capital Variance Type: Variance type will be recorded here for active capital projects, if applicable.
   *Variance Types include: Capital Budget Omission, Capital Budget Variance, Project Budget Variance and Scope Variance.*
2. **Capital Variance Explanation:** Explanation submitted during the PAR process will be reflected in this field, for review.

3. **Approved Capital Budget 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.

4. **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.
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 are linked to Kuali Financials to enable tracking of funds used for capital activity as well as to link to the university’s operating budget by unit.

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): This section shows the “Color of Money”. How is your project being funded? Where is the money coming from to support your request?

Note: In Longview CPT, the fields read bottom up. For Example: The first four rows listed below under “children” of the “parent” Gifts Funds 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), Transfer In-from Restricted Gift – RGGIFT, 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 includes the following: General Purpose Capital Budget Project Support Allocations, Institutional Funds and Transfer In-from Internal Treasury Fund.

Unit Funds - Capital Transfers In
Unit Funds include funds from the LTIP Capital Planning Payout, Funds Functioning as Endowment (FFE) and Transfers In - from: Current Operating, Renewal and Replacement, Capital Reserves, General Reserves, Faculty Renewal Reserves, Contingency and/or Capital Long-term 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 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 also includes Government/Institution Legislative Proposed. Monies received from the City of New York should be budgeted here as well.

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. All Sponsored/Grant funding should be budgeted under Other/Government Programs.

Debt Financing
This refers to funding through short- or long-term 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 and the Executive Vice President/CFO.
Unidentified Funding Source
If the funding source is not yet identified or only partially identified, then the amount of the uncertain budget amount should be entered under “Unidentified Funding Source” as the source. 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): This 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 & Design, Demolition, Building Renewal, Renewal, Net New Space, and Administrative Systems.

Planning & Design: Used to describe projects or needs that are in the planning and/or design phases of development. As noted on page 8, large projects should be entered as two discrete entries, with phase one identified as a Planning & Design 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-FCS) 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. The 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. Administrative Systems contains two sub-categories: Information Systems 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.

**Uncertain Solution - Program:** When the project categorization of Uncertain Solution – Program is selected, there is no corresponding capital use line to support. This project categorization should only 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 & Design** for consideration in the one-year capital budget and five-year capital plan.

**Time Periods**
The Time Periods identify the following time frames for capital activity.

<table>
<thead>
<tr>
<th>Funding Account Number(s)</th>
<th>Prior Year Actuals</th>
<th>Current Year</th>
<th>Projections Through FY2023</th>
<th>2023-0024</th>
<th>2024-0025</th>
<th>2025-0026</th>
<th>2026-0027</th>
<th>2027-0028</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 Year Actuals**
The Prior Year 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 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 Years column is an expandable leaf column, which allows planning for future capital expenditures associated with anticipated needs.
Finishing your Capital Submissions

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 CPT database as frequently as possible to prevent a potential loss of information and your time.

Resume?
This feature was designed to allow the user the ability to return and update any missing fields required for submission. If 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 click under the desired Project Request or Needs Name to access the options menu:

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

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
   - Annulled
   - Holding

*Note: Colleges and units will only have access to change the project or need status to “Proposed Needs” 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>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 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.”</td>
</tr>
<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 projects included in the one-year capital budget or the five-year capital plan. This status represents a fiscal approval for inclusion in the capital plan; it does not represent authorization of any individual project.</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 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. In a PAR, the capital plan line and budget for any sub-project is the portfolio that contains the sub-project. If the sub-project was not included in a portfolio, then the PAR needs to request a capital plan variance.</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 will be addressed by another capital plan project (referred to as the lead project), but not as a discrete phase or sequence within another project. Subsumed should never be applied to a new entry in Longview CPT, but only to existing entries that can be removed as individual rows (entries) because some other project is taking the lead for the scope of work identified in the subsumed project. Projects should not be left in Subsumed By status if the project and its associated lead project is in close out, is complete or if the Subsumed By project should be annulled.</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 upcoming fiscal year. Projects with no further PARs</td>
</tr>
</tbody>
</table>

1 A master project is a project of large scope, scale and budget managed as one entity in the capital plan. The only two recent examples of master projects are Cornell Tech Roosevelt Island Campus and North Campus Residential Expansion. Units would not normally ever be creating a master project without direction from senior administration.
required should go into Close Out unless the remaining active work will extend into the upcoming fiscal year. For example, FY21 projects of limited duration and relatively small budgets with all authorizations completed should likely be put into Close Out when submitting the FY22 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 fiscal year.

<table>
<thead>
<tr>
<th>Complete</th>
<th>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 impending one-year capital budget year).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annulled</td>
<td>Applied to a need or project already in Longview CPT that has gone away (need) or is never going to happen (project). Applied to projects that units would like to delete.</td>
</tr>
<tr>
<td>Holding</td>
<td>Identifies a project that was approved and/or authorized in-between planning cycles.</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>Project Status</td>
<td>Pull-Down Menu</td>
</tr>
<tr>
<td>Project Categorization</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>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 Data Table View will load the Capital Submission Grid data into view and display the below prompts:

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.
**Group By:**
The Group by feature will display all available fields within the data table view that you are allowed to group by. To access the menu, take the following steps:

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

![Group By menu example](image)

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):

![Data Table View example](image)

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]

2. To filter the desired column data, hover over the column of choice, to display a filter icon:
   ![Filter Icon]

3. Click on the filter icon, to display the available options:
   ![Filter Options]

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]

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. Single click the column of choice:
   ![Project Priority]

2. Hold it down to drag the field to the left or right using the dark blue line that displays as your guide:
   ![Drag and Drop]

3. Once you have found your new field location, simply release the left 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:

2. Right click to display the “Hide” option:

3. Single click “Hide” to hide the column selected.

4. Similarly, take the above steps to “Unhide” the columns:

Saving Data Table View Layout
Now, per session you can customize the Data Table View layout. Once the view is organized based on the available features (starting on page 47), take the following steps to save the layout view. Multiple views can be set.

1. Customize view based on available features
2. Select Layout, from the options banner and click Save As

3. Once The Save View As Layout box appears, enter a name for the view for future reference

4. Repeat steps 1-3, to save an additional view
Accessing Saved Data Table View Layout(s)

To access the saved Data Table View Layouts, take the following steps:

1. Select Layout, in the options banner

2. Select Show and your saved views will display to the right

3. Select the view of preference by highlighting and clicking the name

*Note: The views are only available per session. Once a user fully signs out for the day, the Data Table View will return to its original state and ALL saved options will need to be recreated.*
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:

![Export Capital Data Link](image)

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

![Export Capital Data Selector](image)

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 16 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 beyond, the application will export one “.csv” file one for your college or units’ project requests and needs. For historical data (FY2018 and prior) the application will export two separate “.csv” files, one for your college or units’ project requests and needs and one for the space data associated with the projects. The .csv files will be located on your desktop under Documents -> Longview -> CornellPRD -> CapPlan_Export. The .csv files will be located in the CapPlan_Export folder and can be identified with the following formats:

![Csv File Formats](image)

6. Excel will now launch automatically with the data loaded.

7. Once the file is open, select Save As from the File menu and to save as an Excel file (.xlsx).

Note: Planning Years: FY2016 – FY2018 are the only years that will export a space file, as space details were removed from the system in the FY2018 cycle.

Note: If you are exporting the same data area, you must save the first file, or the export will result in an error.
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:

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

3. Within the CornellPRD folder, select CapPlan_Export

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

5. Double click on the .csv file to launch Microsoft Excel

6. From the file menu, select Save as and Save the .csv file as an Excel file (.xlsx).
Audit Reports

Units should audit submissions before system closure in October and at any time records are updated. Units can change projects in Proposed Need to Capital Plan Review and change projects in Capital Plan Review to Proposed Need. For all other status changes, email cp-help@cornell.edu and request the change with clear identification of the identification number, the project name, the current status, and the requested status.

Any time a record is changed, especially when it is moved from one status to another, the unit should review all the fields associated with the record, particularly the sources and uses data. It is contingent upon the unit to represent the correct values for all fields relevant to the project in order for the project to be accurately represented in the capital plan and to avoid the need to request a variance.

The budget details should always reflect the status of the project. Budget detail review comments noted below represent the more obvious signs of an underlying error. Discrepancies should be corrected in the details as appropriate.

Approved Audit

Projects are in Approved status if they are included in the annual capital budget. No records should be in Approved status at the end of the initial submission period (Round 1).

All one-year portfolios need a status change, as the one year portfolios cannot be brought forward into the following year. Individual projects ≥ $250,000 initiated out of the portfolio can be brought forward into the following year. For the one-year portfolios, the status should be set to:

1. Close Out – if there is at least one existing or planned authorization against the portfolio or
2. Annulled – if there are no expected authorizations against the portfolio in the current fiscal year. If it is too early for you to know whether you will have one or more authorizations against your portfolio, email cp-help@cornell.edu and the capital planning team will keep the portfolio on a list for final clean-up. Final decisions will need to be made no later than January.

For all other (non-portfolio) projects:

- If you expect that one or more PARs will circulate against these items before the end of the current fiscal year, then the capital planning team will pick this up as a change in status to Authorized. You need do nothing during the submission period, although it would be helpful to let us know the intentions and timeline for the project.
- If you expect to initiate the project within the current fiscal year but don’t expect any authorizations against it (no spending authorization) until the following year, then adjust your budgets, timing, etc. and set the project to Capital Plan Review so that the capital planning team can make sure to include it in the next year’s capital budget. Projects that aren’t set to Capital Plan Review could be overlooked in setting the next year’s budget, and the first required authorization in the following year will result in a capital plan variance request.
- If you don’t expect any authorizations against this project anytime soon, due to competing priorities or other circumstances, then change the status to Proposed Need. You can then easily put the project back into Capital Plan Review in a future year’s submission, when you are ready to proceed.
• If you don’t expect any authorizations against this project because some other project is addressing the intended effort, then change the status to *Subsumed By* and note in the description field the lead project that will address the scope.

• If you don’t ever expect any authorizations against this project (ever), then change the status to *Annulled*.

The definitions of all statuses can be found on pages 44 and 45.

**Authorized Status**

Review *Authorized* projects:

• Spend in the current fiscal year should be greater than 0
• Authorized to Date should be greater than 0
• Authorized to Date should be less than Total Budget
• Budget to Date should be less than Authorized to Date
• Is spending complete within the current fiscal year? In which case, should the project be set to *Close Out* or *Complete*?

**Budget Detail Review**

• Authorized to Date should reflect all current and planned authorizations for the current fiscal year.
• Authorized to Date should be greater than or equal to the Budget to Date.
• Authorized to Date should be less than or equal to the Estimated Total Budget. If Authorized to Date is less than the Estimated Total Budget, then sources beyond the current fiscal year should be included.
• Expenditures should be included for at least one upcoming fiscal year.

**Capital Plan Review Status**

Review for projects already *Authorized* or that are expected to be authorized before the end of the current fiscal year.

**Budget Detail Review**

• Authorized to Date should be 0.
• Budget to Date should be 0.
• No sources or expenditures should be stated for the current fiscal year.

**Close Out Status**

*Close Out* 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.

Review *Close Out* projects for those that are actually *Complete*. *Complete* 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). *Close Out* status will identify projects with ongoing work and/or expenses in the impending fiscal year; these will not appear in the published one-year capital budget because no further authorizations will be required. *Complete* will identify projects that no longer have work or expenses beyond the current fiscal year.
Budget Detail Review

- Authorized to Date should reflect all current and planned authorizations for the current fiscal year.
- Authorized to Date should equal the Budget to Date.
- Expenditures to Date (through the current fiscal year) should be less than or equal to the Budget to Date.
- Fund sources should be complete in the current fiscal year (given that all authorizations are complete).
- Fund expenditures can continue into one or a few more upcoming fiscal years.

Complete Status

Budget Detail Review

- Authorized to Date should include all authorizations.
- Authorized to Date should equal the Budget to Date.
- Expenditures to Date (through the current fiscal year) should be equal to the Budget to Date.
- Fund sources and fund expenditures should be complete in the current fiscal year.
- If the Final Project Budget, differs from the Approved Estimated Total Budget, update the Final Project Cost field and the budget information.

Pre-Planning Status

Review all projects with the status of Pre-planning and identify any that should be moved to Capital Plan Review or to another status.

Proposed Need Status

For projects in Proposed Need:
1. Confirm that none should be submitted for review for the upcoming capital budget year, and
2. All are still potentially active projects.

Sub-Project Status

Review Sub-Projects and make sure the crosswalk to the portfolio project or master project (rarely) is clear. Enter the name of the portfolio project in the field for “portfolio name.” It is also helpful if the description field in the portfolio project references the names of the sub-projects. The cross-referencing assists the capital planning team in reviewing and mapping the sub-projects to the portfolios.

Subsumed By Status

The Subsumed By status is used to designate a need or project that will be addressed by another capital plan project, but not as a discrete phase or sequence within another project. Subsumed By status only exists for current entries in Longview CPT – it cannot be applied to newly entered projects. Subsumed By projects can be removed as individual rows (entries) in the capital budget/plan because some other project is taking the lead for the scope of work identified in the subsumed project.

Subsumed By projects are completed when the lead project is complete, but are sometimes overlooked for updates during the annual submission process.
Review all projects in *Subsumed By* status:

- Are any complete or in close out because the lead project is done or nearly so?
- Should any be annulled, i.e., they are unlikely to ever happen?
- If the project is correctly identified as *Subsumed By*, identify the lead project (the project under which the work will occur) in the description of the project, preferably at the very beginning of the description. The description of the lead project should also refer to the *Subsumed By* project. Identified relationships between projects bring clarity to the plan.

**Deferred Status**

This status value identifies projects that are deferred in time due to prioritization, sequencing, or other timing issues. Projects within this status should be reviewed for placement into the appropriate status each year.

Review all projects in *Deferred* status:

- Is the project currently active? Send email to cp-help@cornell.edu to request a status change to *Authorized* or *Close-Out* depending on its eBuilder status and follow the guidance above for updates.
- Will the project be active within the current fiscal year? Send an email to cp-help@cornell.edu to request a status change to Capital Plan Review and follow the guidance above for updates.
- Will the project remain delayed for another year? If yes, the project should remain in deferred status.
- Has the project been delayed indefinitely? Send an email to cp-help@cornell.edu to request a status change to *Unit-Delete*.
- Is the project now complete? Send an email to cp-help@cornell.edu to request a status change to Complete and follow the guidance above for updates.

Other Review Tips (*In development*)

1. All projects with an eBuilder number should be status *Authorized, Close Out* or *Complete.*
Accessing Reports in Longview

Capital Reports can be accessed from the Longview CPT Portal, under the left menu option “R”, Reports and selecting the arrow next to Capital.

Under Capital, users can access Capital Audit Reports and Capital Budget Detail Reports, by clicking the arrow under Analysis and Reporting.

Launching Capital Reports

To launch a Capital Report, users should click once on the desired link, to display the report window, which will display as a tab, within the Longview CPT Portal (imaged below):
Once loaded, a Capital user should use the search icon, to select their org from the Symbol Selector window (for detailed instructions, see Using Search Icon on page 16):

- For Submitting View, click on the hollow triangle next to UNIV_000_C, to expand the org list, scroll down and select the desired org.

- For Responsible View, click on the hollow triangle next to UNIV_000_R, to expand the org list, scroll down and select the desired org.

Reports are security driven, users will only be able to access reports for Orgs, in which security access has been granted.
Once the org is selected, select “View Report” from the report window.
Longview Add-In for Office

Source and Use Data Extract

Once logged into the Longview home page, select the green tile labeled “Add-In for Office”.

Another window will open. Select “Open” to continue.

Connect via Excel:

On the excel ribbon select the “Longview” tab.

In the Connections group select “Connect”.
After the Longview Add-In for Office box appears, select “Single sign-on (Web)”.

Next, select “CapitalPlanning – Capital Planning” and click “Ok”.

Data Extract Function:
In the Insert group, select “Data Extract”.
Data Options:
After the Data Extract box appears, you should be in the “Data Options” section. Next to the field “Varying” select “Details” from the dropdown. Fill in the “Symbols” section for your account (org- C_XXXX_C), using the symbol guidance below.

Accounts: C_XXXX_C
Timeper: BBYR2024 - Base Bud 2024 (the period you want to look at)
Entities: DIM2SET - Entities Default
Objects: CAP_OBJECTS - Sources - Capital Uses
Subobjects: SUB_OBJECTS_DEFAULT
Funds: CAP_PLAN_STATUS - Status for Capital Planning
Positions: DIM6SET - Dimension 6 Default
Details: CAP_TOTAL - Total
Versions: DIM8SET - Dimension 8 Default
Next update the “Spec” column as shown below.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Symbols</th>
<th>Spec</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNTS</td>
<td>C:\500 - Budget and Planning</td>
<td>Leaf</td>
<td>0</td>
</tr>
<tr>
<td>TIMEPER</td>
<td>BYR2024 - Base Bud 2024</td>
<td>All</td>
<td>99</td>
</tr>
<tr>
<td>ENTITIES</td>
<td>5M3SET - Entity Default</td>
<td>All</td>
<td>99</td>
</tr>
<tr>
<td>OBJECTS</td>
<td>CAPBJECTS - Sources - Capital Users</td>
<td>Leaf</td>
<td>0</td>
</tr>
<tr>
<td>SUBOBJECTS</td>
<td>SUBOBJECTS_DEFAULT - ---------------</td>
<td>All</td>
<td>99</td>
</tr>
<tr>
<td>FUNDS</td>
<td>CAP_PLAN_STATUS - Status for Capital Planning</td>
<td>Leaf</td>
<td>0</td>
</tr>
<tr>
<td>POSITIONS</td>
<td>3M3SET - Dimension &amp; Default</td>
<td>All</td>
<td>99</td>
</tr>
<tr>
<td>DETAILS</td>
<td>CAP_TOTAL - Total</td>
<td>All</td>
<td>99</td>
</tr>
<tr>
<td>VERSIONS</td>
<td>3M3SET - Dimension &amp; Default</td>
<td>All</td>
<td>99</td>
</tr>
</tbody>
</table>

**Format Options:**
In the “Format Options” section select the below criteria and click “Run Extract”.

<table>
<thead>
<tr>
<th>Format Options</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output for each dimension</td>
<td>Two columns: Symbol Name, Symbol Description</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Alphabetically</td>
</tr>
<tr>
<td>Exclude Zeros</td>
<td>All</td>
</tr>
</tbody>
</table>
Excel Sort Option:
Sort option to align data, using “Data” tab and “Sort & Filter” group.

Tip:
To re-run the query, right click on any column heading and select “Rerun Query” to display the data extract window.