CAPITAL PLANNING SYSTEM
USER MANUAL

<u>Set Agency Level Priorities</u>

Only the Agency Contact is authorized to enter agency priorities in the capital planning system. Projects meeting the following criteria are to be assigned priority numbers: 1) active project, 2) proposed in the first biennium of the planning period, and 3) involves funding from the General Fund or Road Fund.

This function must be accessed on the **SELECT OPTION** page. Under Agency Contact Functions, choose [Select] next to "Set Agency Level Priorities."

Selecting "Set Agency Level Priorities" will display a list of those projects, which meet the criteria requiring that an agency priority ranking be assigned. The ***initial display*** will be in alphabetical order by project title. The project category (e.g., construction, equipment, IT) and the total budget are also displayed. Two columns to the left of the project title will be blank – they are labeled Sort Order and Agency Priority.

<u>ASSIGNING AGENCY PRIORITY NUMBERS</u>

Enter a priority number (up to 4 digits) for each project in the Sort Order column. To move between projects, use the <Tab> key – or mouse. (Using the <Enter> Key will automatically re-sort the projects but will not take the user out of the listing.)

Click on the [Sort] button above the Sort Order column to reorder the display based on the numbers entered.

- The Agency Priority column will display numbers from 1 . . . n based on the total number of projects to which priorities have been assigned. Any projects without priority numbers will be assigned lower priority numbers and moved towards the bottom of the list.

- The Sort Order column will display numbers in intervals of 10. Any project that has not been given a priority number will appear at the bottom of the list.

- Numbers may be entered again in the Sort Order column to allow changes to a priority ranking without re-numbering all projects that follow. (For example, to insert a project between number 10 and 20, assign it the number 15 in the Sort Order column.) Clicking on [Sort] will again reorder the display based on the changes that have been made.

Click the [Save Changes] button to save the priorities that have been assigned. This will automatically enter the ***numbers as reflected in the Agency Priority*** column on the Agency Priority field on Form SYP-P2. The Agency Priority field on Form SYP-P2 will reflect – as read-only – the priority number assigned using the "Set Agency Level Priorities" function.

<u>RETURNING TO THE AGENCY PRIORITY FUNCTION</u>

Once priority rankings have been assigned and the user has left this function, selecting the "Set Agency Level Priorities" function again from the **SELECT OPTIONS** page will display a list of projects with numbers in the Agency Priority column reflecting the most recently saved rankings. The Sort Order column will display numbers in intervals of 10 to facilitate any additional changes by the user.

WHEN A PROJECT IS CHANGED SO THAT A PRIORITY RANKING IS NOT REQUIRED

After priorities have been assigned, if a project changes so that it no longer requires a priority ranking (e.g., it is changed to inactive status, moved out of the first biennium, General/Road Fund amounts deleted), the Agency Priority number will automatically be deleted. Following such changes, users must return to the "Set Agency Level Priorities" function and select [Save Changes] so the priorities on all affected projects are renumbered to close gaps and so the Form SYP-P2 Agency Priority numbers are revised.

WHEN A PROJECT IS CHANGED SO THAT A PRIORITY RANKING IS REQUIRED

If changes are made that would require the assignment of a priority ranking to a project (e.g., changed to active status, moved to the first biennium, General/Road Fund amounts included), the user must return to the "Set Agency Level Priorities" function. Projects without a priority assigned will appear at the top of the list with a blank Sort Order value. The user will need to make the necessary priority ranking modifications, and select [Save Changes] to renumber the projects and revise the Form SYP-P2 Agency Priority numbers.

WHEN A PROJECT (FORM SYP-P2) IS DELETED

When the Form SYP-P2 for a project with a priority ranking assigned is deleted, the user must return to the "Set Agency Level Priorities" function and select [Save Changes] so the priorities on all affected projects are renumbered to close gaps and so that the Form SYP-P2 Agency Priority numbers are revised/updated.

WHEN A PROJECT (FORM SYP-P2) IS ADDED

When a project is added that would require the assignment of a priority ranking (e.g., active status, first biennium, General/Road Fund amounts involved), the user must return to the "Set Agency Level Priorities" function. The new project (no priority assigned) will appear at the top of the list with a blank Sort Order value. The user will need to make the necessary priority ranking modifications, and select [Save Changes] to renumber the projects and revise the Form SYP-P2 Agency Priority numbers.

REQUIRED DATA FIELDS

Before the Cabinet/Agency Contact can submit the completed agency plan to CPAB, the system will check to ensure that each project that meets the criteria has an Agency Priority number assigned and that all priority numbers are in consecutive order with no gaps or duplications.

PRINTING REPORTS

To print a report of projects listed by Agency Priority, [Select] "View/Print Forms" under Agency Level Reports on the **SELECT OPTION** page. Under Proposed Projects–Summary Info, select [View Report] for "(Listing of) Projects Involving the General Fund or Road Fund (Form SYP-P1b)".