

## CAPITAL PLANNING SYSTEM USER MANUAL

### Set Cabinet Level Priorities

Only the Cabinet Contact for Cabinet-level submissions is authorized to assign cabinet priority numbers in the capital planning system. Projects meeting the criteria to be assigned Agency Priority numbers are also to be assigned Cabinet Priority numbers.

The cabinet priority setting function must be accessed on the **SELECT OPTION** page. Under Cabinet Contact Functions, choose [Select] next to “Set Cabinet Level Priorities.”

Selecting “Set Cabinet Level Priorities” will display a list of those projects requiring the assignment of a cabinet priority ranking. The *initial display* will list project titles in order by Agency Priority number. The agency, project category (e.g., construction, equipment, IT) and the total budget are also displayed. Two columns to the left of the Agency Priority will be blank – they are labeled Sort Order and Cabinet Priority.

### ASSIGNING CABINET PRIORITY NUMBERS

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 Cabinet 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 toward 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 Cabinet Priority* column on the Cabinet Priority field on Form SYP-P2. The Cabinet Priority field on Form SYP-P2 is read-only – that is, the Cabinet Priority number cannot be changed directly on Form SYP-P2.

### RETURNING TO THE CABINET PRIORITY FUNCTION

Once priority rankings have been assigned and the user has left this function, selecting the “Set Cabinet Level Priorities” function again from the **SELECT OPTIONS** page will display a list of projects with numbers in the Cabinet 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.

### PROJECT CHANGES

Since the Cabinet Contact has read-only access to the proposed projects data (Form SYP-P2), any changes to those data must be made at the agency level. To the extent a change at the agency level affects the priorities that have been set at that level (e.g., a project is added or deleted, or its status relative to requiring a priority ranking changes), the Agency Contact must first make the necessary adjustments through the “Set Agency-Level Priorities” function. The Cabinet Contact then must make the necessary changes to the cabinet priorities by returning to the “Set Cabinet Level Priorities” function.

### REQUIRED DATA FIELDS

Before the Cabinet Contact can submit the completed agency plans to CPAB, the system will check to ensure that each project that meets the criteria has a Cabinet 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 Cabinet Priority, [Select] “View/Print Cabinet Level Reports” under Cabinet Level Functions 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).”