CAPITAL PLANNING SYSTEM
USER MANUAL

Capital-Related Reports
(Form SYP-B3)

Upon choosing Form SYP-B3 from the **SELECT OPTION** page, a listing of all reports that have already been entered into the system will be displayed in alphabetical order by title. This display also reflects the status of the report relative to a copy being provided to CPAB, and whether any projects directly related to the report are proposed in the agency's capital plan (if so, the box is checked). This listing is based on information entered for each report for which Form SYP-B3 has been completed.

From this listing, the user may take any of the following actions (the steps to do each operation are shown in *italics*)

- Retrieve the detailed data for a specific report to review and/or edit
  - *Select [Edit] on the report line*
- Add a new report and the accompanying detailed data
  - *Select [Add New Report] at the bottom of the page*
- View and/or print the detailed data for a single report
  - *Select [View] under the Reports column on the project line*

Note: Changes to the data or the deletion of an entire report in the listing can be done only by accessing the relevant Form SYP-B3. Changes or deletions cannot be made directly to this listing.

ENTERING DATA

To move between fields on Form SYP-B3, use the <Tab> key or the mouse.

After completing the data entry, selecting [Save Changes] will save the report information to the database if all required data have been entered (see Required Data Fields below). The other option at this point is to [Cancel] which returns the user to the capital-related reports listing, without saving any new or changed data.

TYPES OF DATA

Data on Form SYP-B3 are primarily text. However, there are also fields requiring yes/no responses or where selection from a picklist is required.

Text	Enter text as in a word processing application. Use the up and down arrows or scroll bar to view contents of the field.
Yes/No	Click to fill in the circle to the left of the Yes or No response. (If "yes," be sure to complete the required narrative.)
Picklists-	Click on the down arrow to the right of the data entry field to access the available options.

DELETING A REPORT

To delete a report, select [Edit] from the Form SYP-B3 listing then select [Delete] at the top of the data entry page. The user will be prompted to confirm that the intent is to completely remove the report from the system.

REQUIRED DATA FIELDS

A Report Title must be entered before the system will accept the [Save Changes] instruction on Form SYP-B3.

Before the cabinet/agency contact can submit the completed agency plan to CPAB, the system will run a series of checks to ensure that all required data fields have been completed. The plan will not be submitted unless all required fields are completed. Items that will be checked on Form SYP-B3 are as follow:

- Has at least one Form SYP-B3 been created if "yes" was selected on the Plan Checklist?
- Has the “Purpose of the Report” field been completed?
- Has the “Who Prepared the Report” field been completed?
- Is the “Completion Date” valid and in a mm/yyyy format?
- Has a “Status of Providing a Copy to CPAB” been selected from the picklist?
- Has yes or no been selected for the “Proposed Report-Related Projects” field?
    - If yes is selected, is the narrative field following that question completed?
    - If no is selected, is the narrative field following that question blank?

PRINTING REPORTS

In addition to the ability to print data for individual reports from the capital-related reports listing, all Form SYP-B3 reports can be printed by choosing “View/Print Forms” under Agency Level Reports on the **SELECT OPTION** page.

All reports are provided in PDF, which requires the Adobe Acrobat Reader.