



Cornell University  
Division of Budget and Planning

# Longview Capital Budget Tool (CBT) Reference Guide

How to perform essential tasks in Longview CBT

October 2023



## Table of Contents

<b>TABLE OF CONTENTS .....</b>	<b>1</b>
<b>CAPITAL BUDGET BASICS .....</b>	<b>3</b>
<i>Annual Capital Budget Cycle.....</i>	<i>3</i>
<i>Overview of Longview CBT Submissions.....</i>	<i>3</i>
<b>GUIDELINES FOR LONGVIEW CBT SUBMISSIONS .....</b>	<b>4</b>
<i>Project Categorizations .....</i>	<i>4</i>
<b>LONGVIEW CAPITAL PLANNING TOOL (CBT) BASICS .....</b>	<b>6</b>
<i>Accessing Longview CBT.....</i>	<i>6</i>
<i>Longview Plan - Home Page.....</i>	<i>8</i>
<i>Longview CBT Portal.....</i>	<i>8</i>
<b>GENERAL NAVIGATIONAL FEATURES .....</b>	<b>9</b>
<i>Fields Types Found in Longview CBT.....</i>	<i>9</i>
<i>Pull-Down Menus.....</i>	<i>9</i>
<i>Editable Cells.....</i>	<i>10</i>
<i>Expandable Leaf Columns or Rows .....</i>	<i>10</i>
<i>Using the Search Icon .....</i>	<i>11</i>
<b>CAPITAL BUDGET TOOL APPLICATION .....</b>	<b>14</b>
<i>Launching the Capital Budget Tool.....</i>	<i>14</i>
<i>Organizational Approach.....</i>	<i>15</i>
<i>Capital Views (Data Access).....</i>	<i>15</i>
<i>Data Grid Display (Org Selection) .....</i>	<i>15</i>
<i>Navigating the Responsible Hierarchy .....</i>	<i>16</i>
<b>CAPITAL BUDGET SUBMISSION GRID.....</b>	<b>17</b>
<i>Adding a Request.....</i>	<i>19</i>
<i>Viewing Project Details .....</i>	<i>20</i>
<i>Adding Comments .....</i>	<i>20</i>
<i>Adding Attachments .....</i>	<i>21</i>
<b>CAPITAL BUDGET PROJECT DETAILS TAB.....</b>	<b>24</b>
<i>Reference Information.....</i>	<i>24</i>
<i>Overall Information .....</i>	<i>25</i>
<i>Project Relationship Information.....</i>	<i>26</i>
<i>Status Information.....</i>	<i>27</i>
<i>Maintaining the Capital Budget/Plan Year(s) Field:.....</i>	<i>28</i>
<i>Maintenance Information.....</i>	<i>28</i>
<i>Alignment Information .....</i>	<i>29</i>
<i>Space Information .....</i>	<i>29</i>




---

<i>Review Information</i> .....	30
<i>Timing Information</i> .....	30
<i>Sources - Capital Uses Information</i> .....	30
<b>CAPITAL BUDGET DETAILS</b> .....	<b>31</b>
<i>Navigating the Budget Tab</i> .....	31
<i>Capital Budget Sources</i> .....	31
<i>Capital Uses</i> .....	33
<i>Time Periods</i> .....	33
<b>FINISHING YOUR CAPITAL SUBMISSIONS</b> .....	<b>34</b>
<i>Saving your Entries</i> .....	34
<i>Resume?</i> .....	34
<i>Delete Request</i> .....	34
<i>Changing Project Status</i> .....	34
<i>Accessing Change Project Status option</i> .....	34
<b>STATUS DEFINITIONS</b> .....	<b>36</b>
<b>FILTERING CAPITAL DATA</b> .....	<b>38</b>
<i>Using Filter Requests</i> .....	38
<i>Using Data Table View</i> .....	39
<i>Data Table View Features</i> .....	39
<b>EXPORT CAPITAL BUDGET DATA APPLICATION</b> .....	<b>44</b>
<i>Launching the Export Capital Budget Data Application</i> .....	44
<i>Viewing the Export Capital Budget Data Application Data</i> .....	45
<b>AUDIT REPORTS</b> .....	<b>46</b>
<i>Approved Audit</i> .....	46
<i>Authorized Status</i> .....	47
<i>Capital Plan Review Status</i> .....	48
<i>Close Out Status</i> .....	48
<i>Pre-Planning Status</i> .....	48
<i>Proposed Need Status</i> .....	48
<i>Sub-Project Status</i> .....	49
<i>Subsumed By Status</i> .....	49
<i>Deferred Status</i> .....	49
<i>Holding Status</i> .....	49
<b>ACCESSING REPORTS IN LONGVIEW</b> .....	<b>50</b>
<i>Launching Capital Reports</i> .....	50



## Capital Budget Basics

---

Capital budgeting 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 Budget Cycle

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

The system is planned to be open for three weeks in October. 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 CBT 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 CBT 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 \$2-5M that have not been previously identified; these should be entered into the CBT with appropriate explanation of the need and scope in the project description field. Entry into the CBT will initiate conversations with the Capital Budget and Planning team and Facilities & Campus Services (FCS) regarding scope, budget, and timeline, if such discussion has not already begun.

Any needs/projects submitted into the Longview CBT 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 CBT Submissions

---

All capital needs and projects with an estimated project value of \$250,000 or greater should be entered into Longview CBT.

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 include a projected project value, even if the value is an order of magnitude budget estimate or guess. FCS will work with Colleges and Administrative Units to understand and inform the project values being submitted.

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 the funding sources are TBD.

In general, debt (of any form) 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 value, the amount the unit wants to apply to debt should be entered under “Unidentified Funding Source” as noted above.

### 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.



<b>Project Categorization</b>	<b>Description</b>
<b>Planning &amp; Design</b>	Used to describe projects or needs that are in the planning and/or design phases of development.
<b>Net New Space – Program</b>	Used to describe a project that will add new space rather than substantially renew existing space.
<b>Net New Space – Infrastructure</b>	Used for projects that support utilities or other infrastructure systems (e.g., solar farms, pump houses, substations) and are not meant to be occupied by people.
<b>Building Renewal</b>	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.
<b>Renewal – Programmatic Fit</b>	Used to describe projects that are primarily driven by a need to address a new or underserved programmatic need. The project may address existing infrastructure or maintenance challenges, but these issues are not the primary driver.
<b>Renewal – Infrastructure &amp; Maintenance</b>	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.
<b>Demolition</b>	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 <a href="http://dbp.cornell.edu/home/offices/spaceplanning/resources/">http://dbp.cornell.edu/home/offices/spaceplanning/resources/</a>
<b>Administrative Systems</b>	Used to describe projects that develop and implement or improve administrative systems.
<b>Uncertain Solution Program</b>	Used when the solution is completely unidentified and may not be under consideration for a while.

Very large projects (generally  $\geq$  \$10M) will be separated into two projects by the capital budget administrator. The first project will be identified with the project categorization “Planning & Design.” This allows for first phase activity that has a more defined budget and scope to inform a second phase of activity where the not-to-exceed project value has yet to be established. The Planning & Design phase will be submitted into the one-year capital budget while the second phase will be included in the five-year capital plan (year 2-5). Once the second phase is imminent and ready to roll into the one-year capital budget, the not-to-exceed project value must be established.

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

One-Year Capital Budget

Balch Hall Planning and Design (Planning & Design)  
McGraw Hall Planning and Design (Planning & Design)

Five-Year Capital Plan

Balch Hall Renovation (Building Renewal)  
McGraw Hall Renovation (Building Renewal)



## Longview Capital Planning Tool (CBT) Basics

Longview CBT 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 CBT 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 because of that incomplete understanding. The more near-term the project, the more fields should be completed with appropriate level of detail.

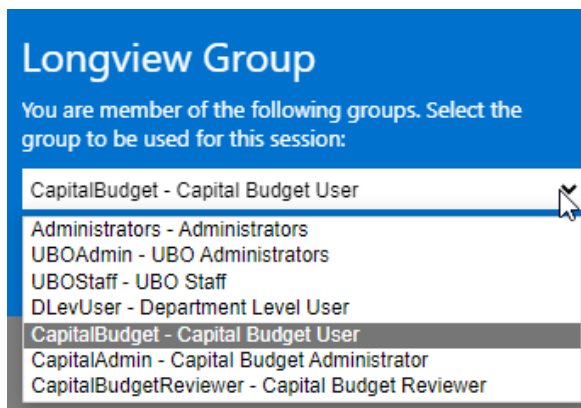
Fields included in Longview CBT are evaluated on a regular basis. Units are welcome to provide input regarding fields that are difficult to complete as well as those that they would like to include and this input will be taken into consideration to inform future system development.

The system requires the use of Microsoft Edge Version 92.0 or higher. Tablets, smart phones and Apple computers are not currently supported.

### Accessing Longview CBT

#### Launching your web browser and accessing the Longview CBT system:

1. Open your Microsoft Edge browser and navigate to the following URL:  
<https://cornell.lvcloud.com/cornellprd> (for the production environment) or  
<https://cornelldev.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.



3. From the Longview Group page, choose the Capital Budget User Group (CapitalBudget) to access and launch Longview Plan.

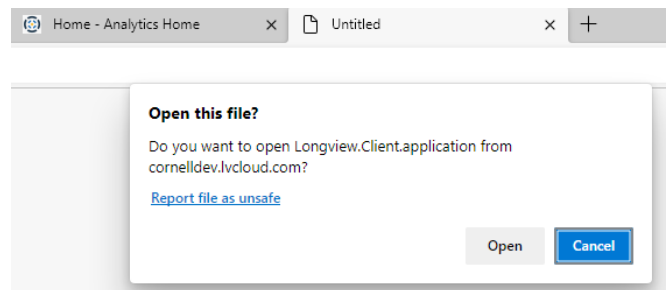
**Note:** You may need to make Microsoft Edge your default browser, instructions are below, or you can copy and paste the above links into your Microsoft Edge browser



4. After your group is selected, you will land on the Longview Home page. Click the “Longview Plan” box, where you will be directed to another window, seen below.



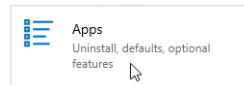
5. Click “Open” to continue launching the application.



**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.



6. Close window.







## Longview Plan - Home Page

After successfully authenticating with Longview CBT, 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 CBT Portal.

## Longview CBT 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. Once the tab loads, double click in the green menu bar area to maximize your screen real estate.

Longview Planning - CML73@CORNELL.EDU/CAPITALBUDGET - CornellTrn

Welcome

Welcome to Longview, CML73@CORNELL.EDU

You are connected to the **CornellTrn** instance as CAPITALBUDGET - Capital Budget User Group User.

LBP System status: **Open**. Open - Longview Budget Planning and Reporting available  
LBP Welcome message: FY24 Budget - The system is open until June 30th for Final Balancing - ubo-help@cornell.edu for help/concerns.

CBT System status: **Open**. Longview Capital Budget Tool and Reporting available.  
CBT Welcome message: Testing FY 2025 changes

KFS data is as of 09/05/2023 11:43PM.  
Workday data is as of 09/05/2023 6:45PM.  
Ebuilder data is as of 09/05/2023 6:45PM.

CornellTrn database refreshed from CornellPrd on 7/3/2023 using a 7/2/2023 snapshot.

### ***Tasks you can carry out from the portal include:***

1. Launch either the Capital Budget Tool or Export Capital Budget Data Application, depending on your need.
  - a. To enter a capital project or a proposed need, select the Capital Budget Tool Application.
  - b. To view project data, select the Export Capital Budget 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.
2. 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 46.***
3. Review supportive documentation.



## General Navigational Features

### Fields Types Found in Longview CBT

Based on the way Longview CBT 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 Budget Project Details Tab](#) section (starting on page 24).

- 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
- h. Integrated Pull-Down Menu field

### 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.

Campus Identifier	ITH
Capital Budget ID	0
Project Categorization	Planning and Design
Funding Account Number(s)	0
eBuilder Number(s)	0
eBuilder Project Phase	0
eBuilder Project Type	0
KFS Project Account Number	0
▾ Reference Information	

2. Once highlighted, double click to display the field's pull-down menu.

Campus Identifier	ITH
Capital Budget ID	0
Project Categorization	Planning and Design
Funding Account Number(s)	0
eBuilder Number(s)	0
eBuilder Project Phase	0
eBuilder Project Type	0
KFS Project Account Number	0
▾ Reference Information	

**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.

Cost Identifier		0
Project Value		750,000
Authorized Budget to Date		315,000
Year Submitted	FY2024	
Capital Budget/Plan Year(s)	FY2023	

### Expandable Leaf Columns or Rows

As a general rule of thumb, if you see a black shaded triangle (▾), this is an expandable field, whether it be a row or column. Clicking on the black shaded triangle icon (▾) will reveal one or more additional “children” columns or rows, that make up the “parent” column or row. For example, the “parent” column “Gift Funds” is the first column that is collapsed on the submission grid (see [Capital Budget Submission Grid](#) on page 17 for further details). By clicking the black shaded triangle 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 (▴) next to the “parent” column, in this example Gift Funds, to close the fields.

▾ Gift Funds	▾ Centrally Managed Funds	▾ Unit Funds	▾ Auxiliary and Service Ops	▾ State Appropriations (SUCF)	▾ Other/Government Programs	Third Party Developer	▾ External Debt	Unidentified Funding Source	▾ Sources
--------------	---------------------------	--------------	-----------------------------	-------------------------------	-----------------------------	-----------------------	-----------------	-----------------------------	-----------

*Gift Funds Column Collapsed*

Capital Budget/Plan Year(s)	Cost Identifier	Project Value	Authorized Budget to Date	NO - Gifts Cash	Transfer In - from Plant Gift	Transfer In - from Restricted Gift - RGGIFT	Pledge payments- Capital Budget	Gifts to be Raised- Capital Budget	▾ Gift Funds
-----------------------------	-----------------	---------------	---------------------------	-----------------	-------------------------------	---	---------------------------------	------------------------------------	--------------

*Gift Funds Column Expanded*



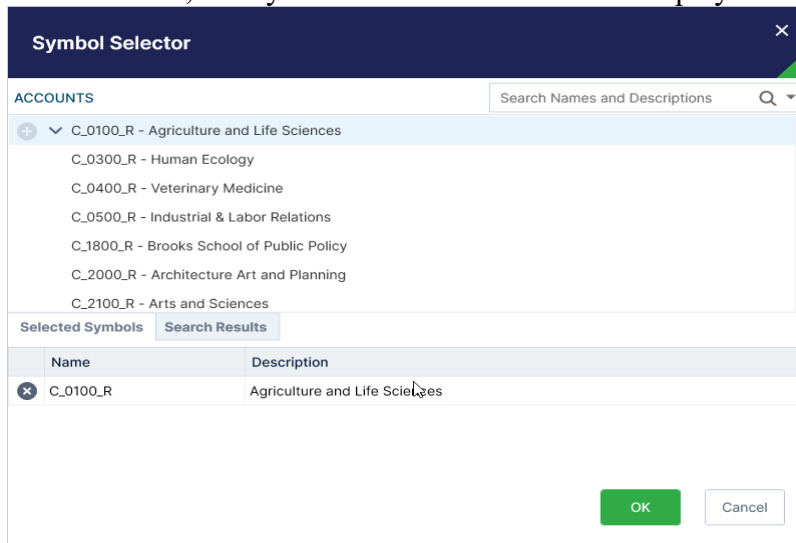
## Using the Search Icon

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:**

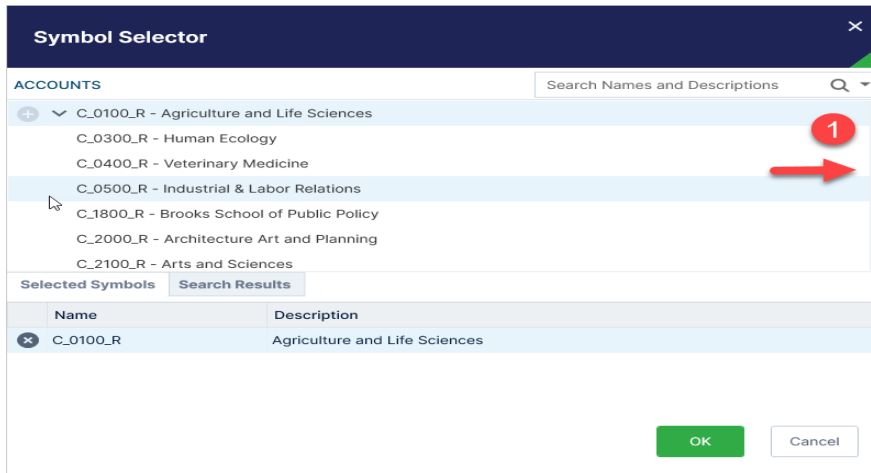
1. Navigate the hierarchy manually by scrolling through the list.
2. Navigate the hierarchy manually, using the drill-down method.
3. Use Text Search.



## Navigate the Hierarchy Manually

### To navigate manually by scrolling down the list:

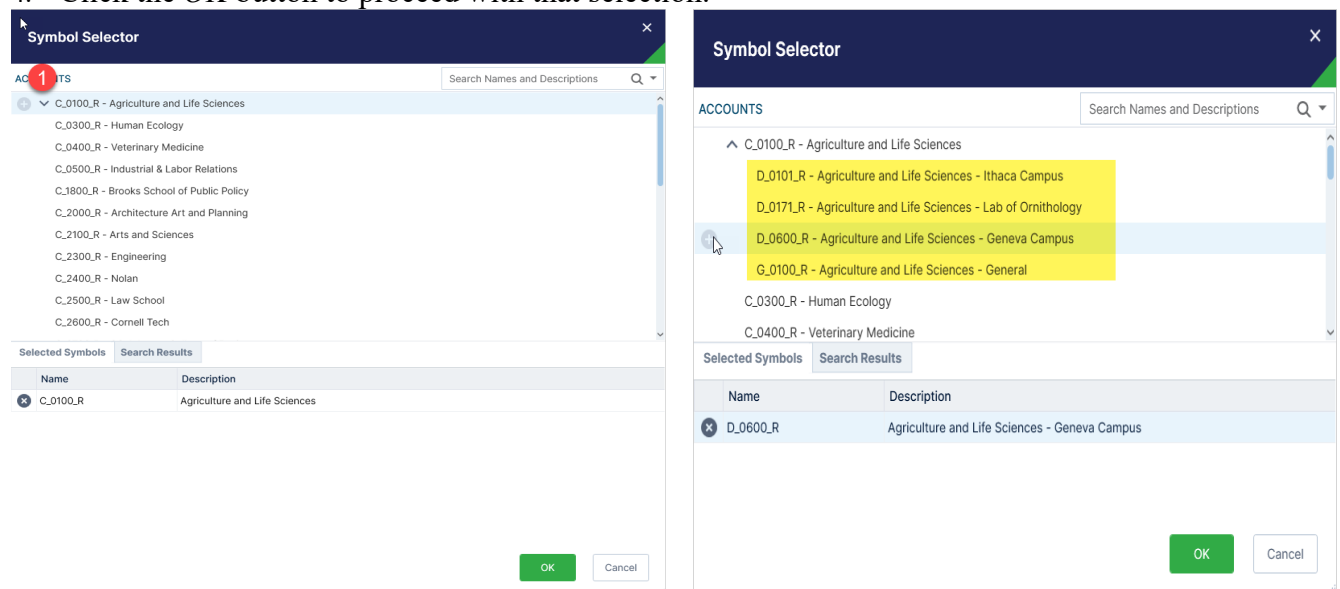
To search manually, use your mouse or screen directive arrows to scroll down the page to the College/Unit that you wish to select as the Responsible Unit. Once found, single click the appropriate College/Unit to display a gray “+” icon (⊕). This feature allows you to select that symbol. The selected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



## Navigate the Hierarchy using Drill Down

### Using “Drill down” for your search:

1. Click on the downward arrow (∨) to the left of the organization. This will expand the hierarchy one level and point the arrow upwards (∧). Continue to click the downward arrow (∨) until you reach the org level (or account) you want.
2. Click on the gray “+” 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 gray “x” icon (⊗).
4. Click the *OK* button to proceed with that selection.



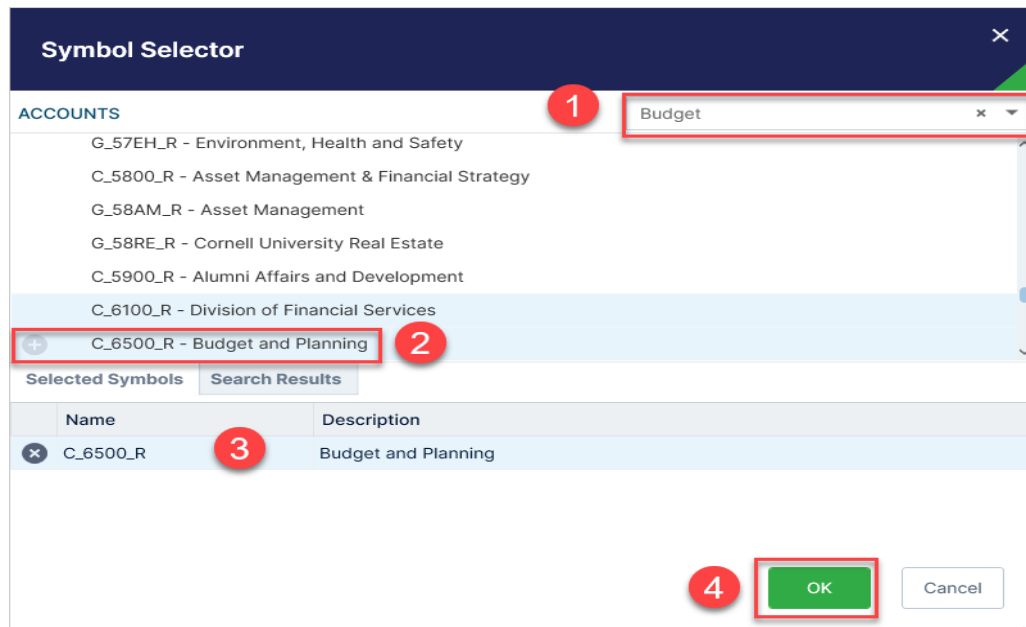


**Note: Drill functionality is only available when searching the responsible hierarchy, see [Navigating the Responsible Hierarchy](#), [page 16](#).**

### 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 gray “+” icon (+) to select that symbol. This will move that symbol to the *Selected Symbols* tab (as above).
4. Click *OK* to continue.



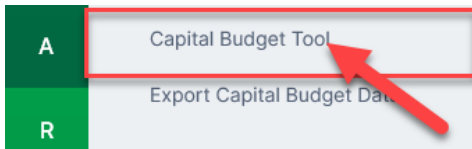


## Capital Budget Tool Application

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 Budget Tool

1. To begin, single click the Capital Budget Tool Link:



2. to select your data access:

A screenshot of a web form titled 'Capital Projects Org Selector (CornellTrn)'. The form has a dark blue header. Below the header, there is a section titled 'Data Access' with a red asterisk. Under 'Data Access', there are two radio buttons: 'Lock' (selected) and 'Read Only'. Below this is a section titled 'Select desired Org to update/view:'. It contains two dropdown menus: 'Submitting Unit' and 'Responsible Unit', each with a search icon to its right. Below the dropdowns is the text 'Selected Org Description' followed by '\*no org selected\*'. At the bottom left, there is a red asterisk and the word 'Required'. At the bottom right, there are two buttons: 'Next' and 'Cancel'.

*Capital Planning- Organization Planning Selector 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 Budget Submission Grid (see [Capital Budget Submission Grid](#) below on page 17).

Some Units such as Facilities and Campus Services (FCS) and Student & Campus Life (SCL) have more complex organizational and funding structures that have department and/or group-level tabs, also with four-digit 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 (Data Access)

**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 (Org Selection)

**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.*

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

To select your assigned College or Administrative Unit:

1. Choose your Data Access, Lock or Read Only
2. Navigate to the Data Grid Display – choosing either the Submitting Unit or Responsible Unit drop-down menus.





3. Choose the College/Unit for which you want to view/enter data. Click “Next”.
4. Once you click “Next” in the project org selector window, Longview CBT will load the account data from your selection into the Capital Budget 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 Budget Submission Grid for further information.

### Navigating the Responsible Hierarchy

If you select the “Responsible Unit” drop-down menu as your data grid display, note the data will appear in “Read Only” mode, even if Lock is selected under Data Access.

Data can **ONLY** be changed using the Submitting Unit, data display.

Please follow the steps below to access your assigned College/Unit:

**Capital Projects Org Selector (CornellTrn)**

**Data Access**

Select Data Access \*

Lock

Read Only

**Select desired Org to update/view:**

Submitting Unit

Responsible Unit

Selected Org Description

\*no org selected\*

\* Required

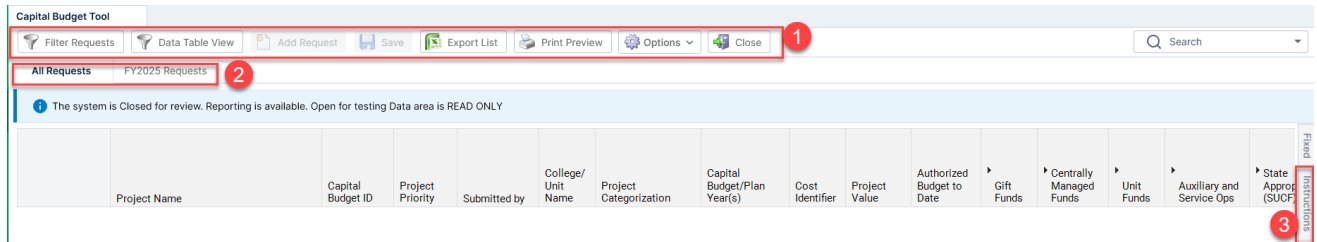
Next Cancel

1. Double click on the Responsible Unit Drop-Down menu to load the responsible orgs, you have security access to view.
2. Double click on the org you wish to select.
3. The selected org will appear in the Capital Project Org Selector screen.
4. You can additionally, click the magnifying glass, to utilize 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 11 for further instructions).
5. Click “Next” to continue to the Data Grid.



## Capital Budget Submission Grid


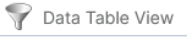






The Capital Budget Submission Grid is the portal hub that holds all capital activity requests or needs at the College/Unit level.



### Capital Budget Submission Grid

The Capital Budget 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 19, 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 CBT 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 Capital Project Org Selector Screen. 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., FY2025 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 Budget 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:

<b>Feature:</b>	<b>Description:</b>
<b>Cut:</b>	Cut the contents of a cell, to be placed in another cell.
<b>Copy:</b>	Copy the selected cell’s content.
<b>Paste:</b>	Paste values from the clipboard into a cell.
<b>Freeze:</b>	Use Freeze to Freeze the screen in place, right click to Unfreeze.
<b>Comments:</b>	See <a href="#">Adding Comments</a> on Page 22.
<b>Attachments:</b>	See <a href="#">Adding Attachments</a> on Page 23.
<b>View Project Details:</b>	See <a href="#">Viewing Project Details</a> on Page 22.
<b>Duplicate Request:</b>	This feature allows you to duplicate the previously entered request or any selected request, if necessary.
<b>Change Project Status:</b>	See <a href="#">Changing Project Status</a> on Page 37.



## 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 Budget 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 project value. This can be a rough estimate (order of magnitude budget), if the planned solution is in early development.
4. Select Submit, to load the request or need to the Capital Budget Submission Grid.
5. To exit the Add Request Screen, select cancel to return to the submission grid.

**Add Capital Request (CornellTrn)**

C\_0100\_C - Agriculture and Life Sciences

Project Name \*  
[Text Input]

Cost Identifier \*  
[Dropdown]

Project Value \*  
[Text Input: 0]

Project Categorization \*  
[Dropdown]

Description \*  
[Text Input]

Justification \*  
[Text Input]

Priority \*  
[Text Input: 0]

College/Unit Org Code \*  
C\_0100\_R [Dropdown] 🔍

Scratchpad for text data

\* Required

Submit Cancel

*Tip: From this window, you will enter the basic details of your project or proposed need that will load directly into the Capital Budget 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 “Submit”, 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 “Cancel” and the project request entered will display in the Submission Grid.*

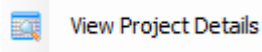
**Note: Longview CBT was designed to assume that the Submitting and Responsible College/Unit for a project request and/or need are the same. However, if another College or Administrative Unit is the Responsible Unit for the project or need, use the drop-down menu or the search icon 🔍 to select the appropriate College/Unit (for additional details on [Using the Search Icon](#) see page 11).**

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



### Viewing Project Details

- Next to the “Project Name”, underneath the column, “Capital Budget ID” right click to select “View Project Details”.



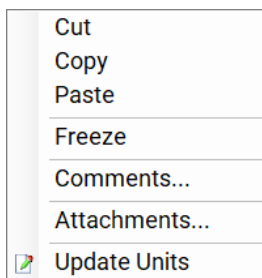
- Single click “View Project Details” to display the Capital Budget Project Request Screen (see section titled [Capital Budget Project Detail Tab](#) below for further details):

Details	Budget
	C_0100_REQ_08 - CALS Plant Science Innovation and Business Development Center
Campus Identifier	ITH
Capital Budget ID	0014;
Project Categorization	Renewal - Programmatic Fit
Funding Account Number(s)	0
eBuilder Number(s)	10706;
eBuilder Project Status	Closed
eBuilder Project Phase	0
eBuilder Project Type	0
KFS Project Account Number	IT-1169743
▾ Reference Information	

### Capital Budget- Project Request Screen

#### Adding Comments

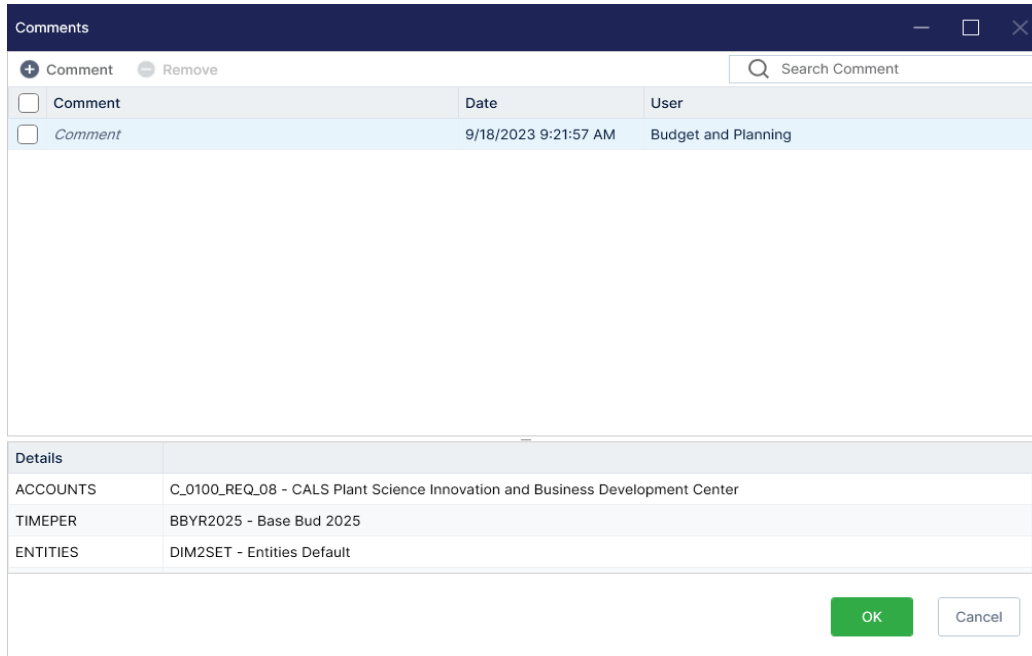
- To add a Comment to a project request, you will need to utilize the right click menu options as follows:
  - Right mouse-click on desired area within project to display menu:



- Select Comments... menu option.

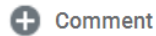


c. The Comments window will display:



d. Single - mouse click on the word comment in the blue area to begin adding your comment.

e. If multiple comments are needed, select the Comment button in the upper left-hand corner.



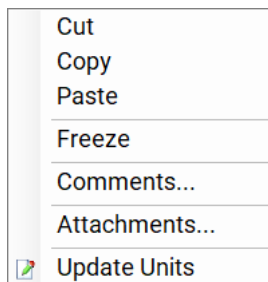
f. To load the comments and to exit the window, select OK.

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:

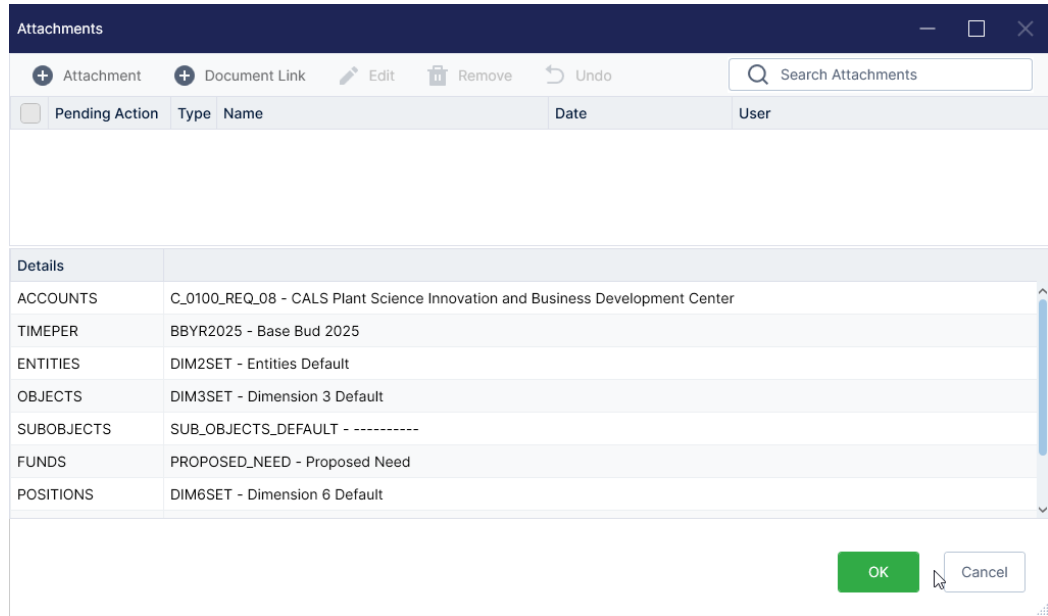
a. Right mouse-click on desired area within project to display menu:




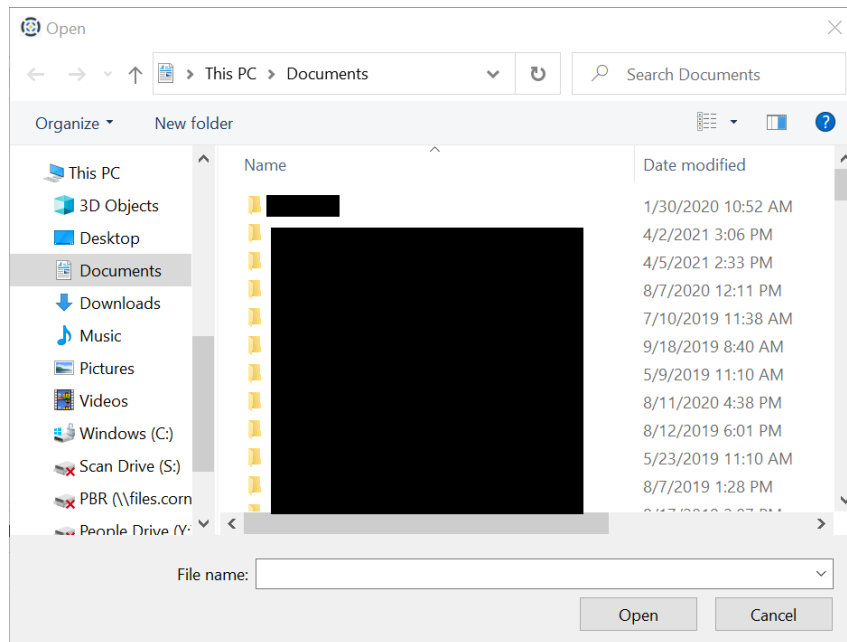
b. Select Attachments... menu option.



c. The attachments window will display:



d. On the top left corner, select the Attachment button , which will launch your file search to search your local machine:



- 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.

	C_0100_REQ_08 - [REDACTED]	
Campus Identifier	ITH	
Capital Budget ID	0014;	
Project Categorization	Renewal - Programmatic Fit	
Funding Account Number(s)		0
eBuilder Number(s)	[REDACTED]	
eBuilder Project Status	Closed	
eBuilder Project Phase		0
eBuilder Project Type		0
KFS Project Account Number	[REDACTED]	
▼ Reference Information		
Project Name	[REDACTED]	
eBuilder Project Name		0
Submitting Org Code	C_0100_C	
Submitted by	Agriculture and Life Sciences	
College/Unit Org Code	C_0100_R	
College/Unit Name	Agriculture and Life Sciences	
Facility Code		0
Description	[REDACTED]	
Justification	[REDACTED]	
▼ Overall Information		
Portfolio Name		0
Related Master Project		0
Related Sub-Project(s)		0
Subsumed By		0
Enabling project notes	[REDACTED]	
▼ Project Relationship Information		





## Capital Budget 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:

Field Description	Field Type
<b>Campus Identifier</b>	Admin Only Field
<b>Capital Budget ID</b>	Admin Only Field
<b>Project Categorization</b>	Pull-Down Menu
<b>Funding Account Number(s)</b>	Numeric Field (supports text)
<b>eBuilder Number(s)</b>	Numeric Field
<b>eBuilder Project Status</b>	Integrated Pull-Down Menu
<b>eBuilder Project Phase</b>	Integrated Pull-Down Menu
<b>eBuilder Project Type</b>	Integrated Pull-Down Menu
<b>KFS Project Account Number</b>	Integrated Field

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. Capital Budget ID: This field is for Administrative Use Only. Starting with the FY19 Capital Budget, all **approved** projects have been assigned a capital budget ID. This number should be referenced in the FPAR process and entered into supporting eBuilder field, CBID.
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. Funding Account Number(s): Enter the funding account number(s), associated with the project or need.
5. eBuilder Number(s): Enter the project number in eBuilder, if applicable.
6. 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.*
7. 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.*
8. 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.

*Current menu options include: Code Compliance, Condition Assessment, Demolition, Infrastructure, Infrastructure/Systems, Landscape, Maintenance, Maintenance & Repair, New Construction, New Construction/Renovation, Planning/Study, Renovation, Systems, Transportation, and Other.*

9. 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, such as 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:**

Field Description	Field Type
Project Name	Text Field
eBuilder Project Name	Integrated Field
Submitting Org Code	Autofill Field
Submitted By	Autofill Field
College/Unit Org Code	Autofill Field
College/Unit Name	Autofill Field
Facility Code	Numeric Field
Description	Text Field
Justification	Text Field

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 FPARs, 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.
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, such as 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 [“Using Search Icon”](#), for additional 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.

*Example Description:*

*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.

*Example Justification:*

*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:**

Field Description	Field Type
Portfolio Name	Text Field
Related Master Project	Text Field
Related Sub-Project(s)	Text Field
Subsumed By	Text Field
Enabling Project Notes	Text Field

1. Portfolio Name: For Units maintaining sub-projects in the system, enter the supporting portfolio name that the sub-project(s) roll-up to. *This field is now being maintained for historical reporting purposes.*
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 Master Projects, enter in the names of the supporting sub-project work, which are included in the master project.
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 the names and a brief description for any enabling projects. Cost details around the enabling work should be entered here within the text. If there are no enabling projects, leave the field as is with the default value 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:**

Field Description	Field Type
Cost Identifier	Pull-Down Menu
Project Value	Numeric Field
Authorized Budget to Date	Numeric Field
Year Submitted	Pull-Down Menu
Capital Budget/Plan Year(s)	Admin Only Field

1. Cost Identifier: Used to determine the confidence level of the project value being submitted.  
Cost Identifier Types:
  - a. **Order of Magnitude Budget:** Used for early capital planning. A preliminary budget using historical cost by facility type. The cost identifier is based on a reasonably defined scope without a specific facility solution.
  - b. **Benchmark Budget:** Used for first project approval request (FPAR Design Authorization). Opinion of internal subject matter experts informed by scope, intended schedule, and project limit lines but not yet fully informed by confirmed scope and schedule and existing conditions.



- c. **Design Phase Estimate:** Used to adjust Benchmark Budget or subsequent estimate based on design effort. Cost estimate from AE Team based on design phase documents (schematic, design, development).
- d. **Final Project Cost:** Used for final authorization. Authorized construction FPAR value based on a contractor's bids.
2. **Project Value:** For projects and/or needs, enter the total project value, even if the amount is an estimate. For submissions for programs without identified solutions, change the default value of 0, to \$250,000 selecting the project categorization, Uncertain Solution – Program. This amount can be revised, as details are refined.
3. **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.*
4. **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.
5. **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 FPAR/SPAR 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).*

### 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 Project submitted into the five year capital plan are reviewed by Senior Leadership and not approved by the Trustees. These projects will be assigned the associated four year range (years 2-5) reflecting the capital plan year submission (e.g., FY2022-2025 for the FY2021 capital budget year).

### 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:**

Field Description	Field Type
Estimated Maintenance Backlog Addressed	Numeric Field
Functional Renewal Value	Numeric Field

1. Estimated Maintenance Backlog Addressed: Please add the details per the facilities maintenance Unifomat 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.**
2. Functional Renewal Value: A calculated field that returns the difference between project value and estimated maintenance backlog addressed. This field was design to highlight the overall amount of facility investment we are making towards the University’s capital infrastructure. The value is only calculated for our Renewal Project Categorizations: Building Renewal, Renewal – Programmatic Fit, Renewal – Infrastructure & Maintenance and Demolition.

**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:**

Field Description	Field Type
Project Synergies	Text Field
Project Priority	Numeric Field
Alignment Notes	Text Field

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.

**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:**

Field Description	Field Type
-------------------	------------



Space Notes	Text Field
-------------	------------

- 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.

### Review Information

***This section is for the use of the Administrator only and cannot be filled out by the units.***

The review information section includes the following fields:

- 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 CBT 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 CBT system.

▶ Gift Funds	0
▶ Centrally Managed Funds	0
▶ Unit Funds	0
▶ Auxiliary and Service Ops	0
▶ State Appropriations (SUCF)	0
▶ Other/Government Programs	0
Third Party Developer	45,500,000
▶ External Debt	0
Unidentified Funding Source	0
▼ Sources	<b>45,500,000</b>
Capital Uses	45,500,000
▼ Sources - Capital Uses	



## Capital Budget Details

The Capital Budget Tab identifies information about the way a project will be funded (sources), the anticipated schedules for expenditures (capital uses), and the alignment to our fiscal calendar (time periods). The sources are additionally linked to Quali Financials with object code planning, 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

Project Name	Projections	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	Next 5 Years	Future Years	Total	Project Name
	through FY2023									
NO - Gifts Cash	0	0	0	0	0	0	0	0	0	
Transfer In-from Plant Gift	0	0	0	0	0	0	0	0	0	
Transfer In-from Restricted Gift -RGGIFT	0	0	0	0	0	0	0	0	0	
Pledge payments- Capital Budget	0	0	0	0	0	0	0	0	0	
Gifts to be Raised- Capital Budget	0	0	0	0	0	0	0	0	0	
▼ Gift Funds	0	0	0	0	0	0	0	0	0	
General Purpose Capital Budget Project Support Allo	0	0	0	0	0	0	0	0	0	
Institutional Funds	0	0	0	0	0	0	0	0	0	
Transfer In-from Internal Treasury Fund	0	0	0	0	0	0	0	0	0	
▼ Centrally Managed Funds	0	0	0	0	0	0	0	0	0	
LTIP Capital Planning Payout	0	0	0	0	0	0	0	0	0	
Transfer In - from Current Operating	0	0	0	0	0	0	0	0	0	
Transfer In - from FFE	0	0	0	0	0	0	0	0	0	
Transfer In-from Renewal & Replacement	0	0	0	0	0	0	0	0	0	
Transfer In-from Capital Reserve	0	0	0	0	0	0	0	0	0	
Transfer In - from General Reserves	0	0	0	0	0	0	0	0	0	
Transfer In - from Faculty Renewal Revs	0	0	0	0	0	0	0	0	0	
Transfer In - from Contingency	0	0	0	0	0	0	0	0	0	
Transfer In - from Capital Long-Term	0	0	0	0	0	0	0	0	0	
▼ Unit Funds	0	0	0	0	0	0	0	0	0	
Service Operations	0	0	0	0	0	0	0	0	0	
Enterprise Funds	0	0	0	0	0	0	0	0	0	
▼ Auxiliary and Service Ops	0	0	0	0	0	0	0	0	0	
Non Operating - Approp-State Const Fund	0	0	0	0	0	0	0	0	0	
Non-Operating - Approp - State Const Fund - Anticipa	0	0	0	0	0	0	0	0	0	
▼ State Appropriations (SUCF)	0	0	0	0	0	0	0	0	0	
Transfer In - from Sponsored	0	0	0	0	0	0	0	0	0	
Contract & Grant Revenue Direct	0	0	0	0	0	0	0	0	0	
Contract & Grant Revenue Proposed	0	0	0	0	0	0	0	0	0	
Government/Institution Legislative Proposed	0	0	0	0	0	0	0	0	0	
Other Affiliated Programs	0	0	0	0	0	0	0	0	0	

### Capital Planning Budget Tab

The budget tab has been divided into three sections:

1. Sources
2. Capital Uses
3. Time Periods

### Capital Budget 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 CBT, the fields read bottom up. For Example: The first four rows listed to the right are the “children” of the “parent” row Gifts Funds. If you select the black triangle that tips upward ( ▲ ), the rows will roll down into the “parent” row.**

NO - Gifts Cash
Transfer In-from Plant Gift
Transfer in-from Restricted Gift -RGGIFT
Pledge payments- Capital Budget
Gifts to be Raised- Capital Budget
▼ Gift Funds





**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 and Transfers In from: 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.

**External Debt**

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 external debt that hasn't already been agreed to by the Provost.

▾ Gift Funds
General Purpose Capital Budget Project Support Allocations
Institutional Funds
Transfer In-from Internal Treasury Fund
▾ Centrally Managed Funds
LTIP Capital Planning Payout
Transfer In - from Current Operating
Transfer In - from FFE
Transfer In-from Renewal & Replacement
Transfer In-from Capital Reserve
Transfer In - from General Reserves
Transfer In - from Faculty Renewal Resvs
Transfer In - from Contingency
Transfer In - from Capital Long-Term
▾ Unit Funds
Service Operations
Enterprise Funds
▾ Auxiliary and Service Ops
Non Operating - Approp-State Const Fund
Non-Operating - Approp - State Const Fund - Anticipated
▾ State Appropriations (SUCF)
Transfer In - from Sponsored
Contract & Grant Revenue Direct
Contract & Grant Revenue Proposed
Government/Institution Legislative Proposed
Other Affiliated Programs
▾ Other/Government Programs
Third Party Developer
Transfer In - from Debt Service
▾ Debt Financing
Unidentified Funding Source
▾ Sources



### 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): The capital use line identifies project expenditures planned over time. These expenditures should be aligned to the anticipated cash flow schedule of the project, meaning when will the expenditure leave the University’s resources to pay submitted bills for the work completed.

### Time Periods

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

Projections ▶ through FY2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	◀ Next 5 Years	▶ Future Years	◀ Total
------------------------------------	-----------	-----------	-----------	-----------	-----------	-------------------	-------------------	---------

### Projections through FY##### (##### = fiscal year)

The Projections through FY##### field is an expandable leaf column, that represents the sum of Prior Year Actuals and Current Year activity. Anticipated FPAR approvals should be planned in the actuals columns (i.e., 2023 – 2024 (Actuals) for funding (appropriate Funding Source) and the projected columns for expenditures (Capital Uses) (i.e., 2023 -2024 (Projected).

### 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. 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.



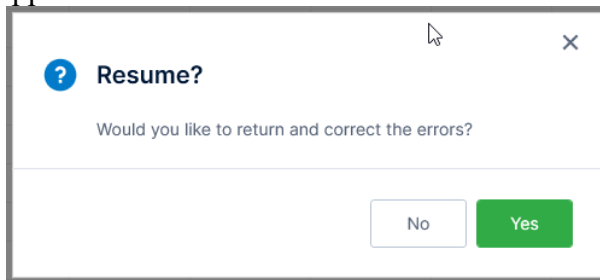
## Finishing your Capital Submissions

### 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 CBT 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](mailto:cp-help@cornell.edu), so your request(s) can be reviewed by the Director of Capital and Space Planning.

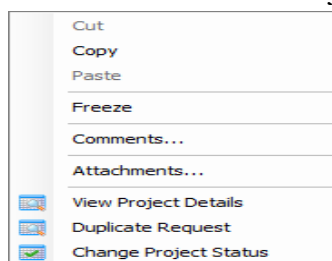
### Changing Project Status

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:

The screenshot shows a web browser window titled "Cornell - Capital Planning". The main content area is titled "Change Project Status" and features the Cornell University logo and name. Below the header, there are two input fields: "Project Name" with the text "Test" and "Status" with a dropdown menu showing "Proposed Needs". At the bottom of the form, there are two buttons: "Next" and "Cancel".

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](mailto: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 Budget Submission Grid.



## Status Definitions

Status Value	Description
<b>Proposed Need</b>	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.
<b>Capital Plan Review</b>	Used to identify all capital needs that are ready for review for the one-year capital budget and five-year capital plan.
<b>Pre-Planning</b>	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 CBT, 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.”
<b>Approved – Tentative</b>	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.
<b>Approved</b>	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.
<b>Authorized</b>	This status value identifies all projects that are active and authorized to spend through the PAR process.
<b>Sub-Project</b>	A project that is one of several included in a portfolio or master <sup>1</sup> 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.
<b>Deferred</b>	This status value identifies projects that are deferred in time due to prioritization, sequencing, or other timing issues.
<b>Subsumed by</b>	Used to designate a need or project that will be addressed by another capital plan project (referred to as the <i>lead project</i> ), but not as a discrete phase or sequence within another project. Subsumed should never be applied to a new entry in Longview CBT, 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.

<sup>1</sup> 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.



---

<b>Close Out</b>	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.
<b>Complete</b>	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 1 <sup>st</sup> of the impending one-year capital budget year).
<b>Annulled</b>	Applied to a need or project already in Longview CBT that has gone away (need) or is never going to happen (project). Applied to projects that units would like to delete.
<b>Holding</b>	Identifies a project that was approved and/or authorized in-between planning cycles.



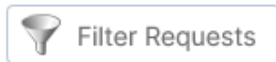
## Filtering Capital Data

Longview CBT 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

Field Description	Field Type
Cost Identifier	Pull-Down Menu
Project Cost >	Numeric Field
Project Cost <	Numeric Field
Project Categorization	Pull-Down Menu
Project Status	Pull-Down Menu
Submitting Unit	Search Icon
Responsible Unit	Search Icon
Sources	Search Icon
Timing	Search Icon

*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.*



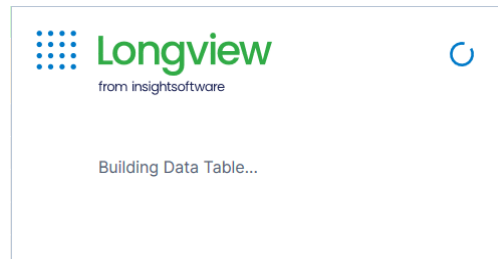
## Using Data Table View

Data Table View provides the same capability as the Filter Request option, but holds some additional features, which are outlined below.

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



2. Once selected, the Data Table View will load the Capital Budget 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.

Capital Budget Tool (Longview)

Group by  Filter Remove Filter Export to Excel Layout Close

Search

Submitted by	Status	Campus Identifier	Capital Budget ID	Project Categorization	Project Name	Portfolio N
Agriculture and Life	APPROVED	ITH	0442;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0440;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0305;0441;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0304;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0597;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0551;0306;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0560;0438;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0574;0438;	Renewal - Programr		
Agriculture and Life	AUTHORIZED	ITH	0582;	Renewal - Infrastruc		
Agriculture and Life	AUTHORIZED	ITH	0607;0439;	Renewal - Programr		
Agriculture and Life	CAPITAL_PLAN_REV	ITH	0	Renewal - Infrastruc		
Agriculture and Life	CLOSE_OUT	ITH	0235;	Renewal - Programr		

100%

Data Table View

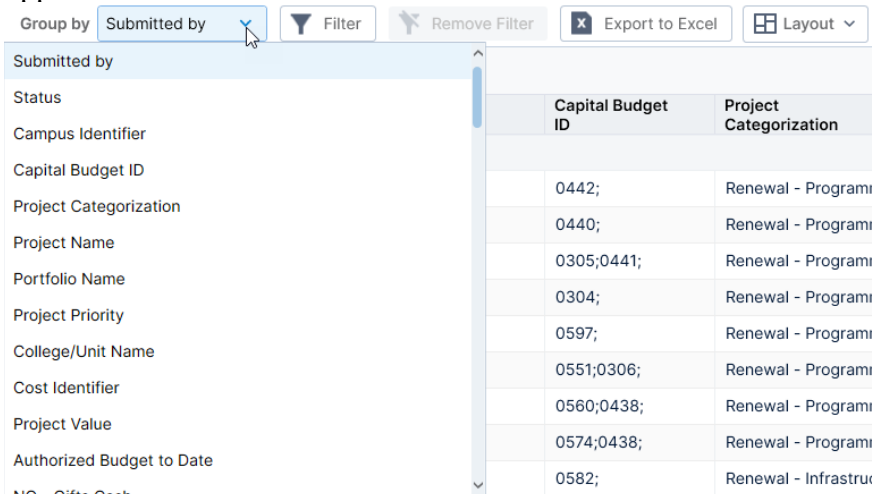




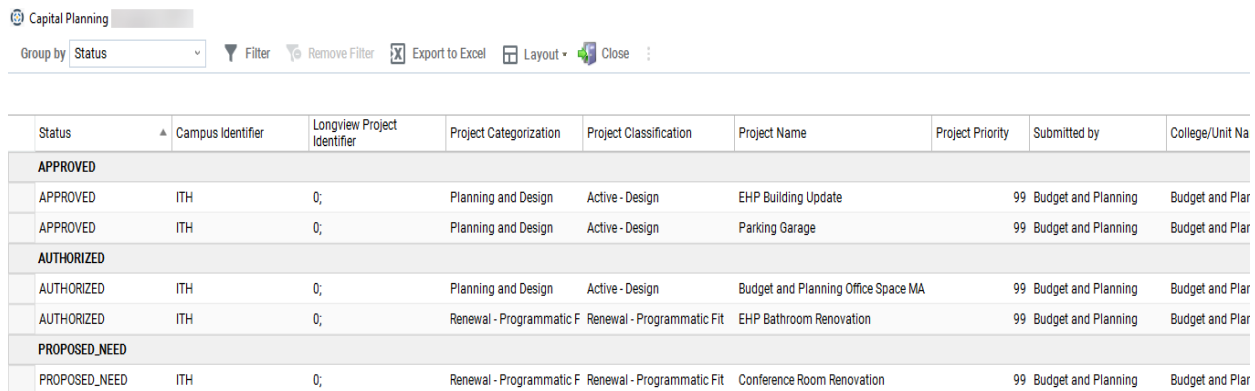
### Group By:

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:



2. Next, select the fields you would like to group your data by, by single-clicking the field name. (The example below was sorted by Status):



3. If you would like to change the grouping, simply reselect the menu and select another field.

### Adding a Filter

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

1. Select the filter icon in the toolbar:

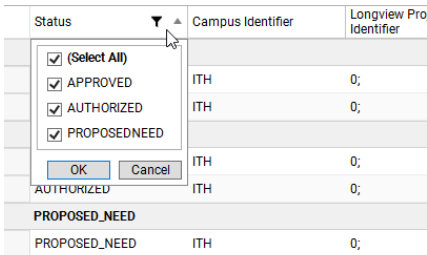
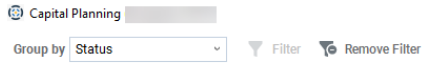




- To filter the desired column data, hover over the column of choice, to display a filter icon:



- Click on the filter icon, to display the available options:

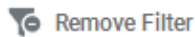


- Choose the desired options by checking or unchecking the boxes and select OK to load.

### Removing a Filter

To remove the filter, take the following steps:

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

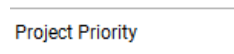


**Note:** If you are utilizing other options such as Group by or Drag and Drop, these features will remain intact.

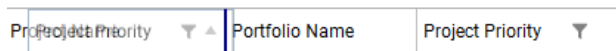
### Drag and Drop

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

- Single click the column of choice:



- Hold it down to drag the field to the left or right using the dark blue line that displays as your guide:

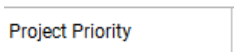


- Once you have found your new field location, simply release the left click and the field will drop into the new desired location.

### Hiding Columns:

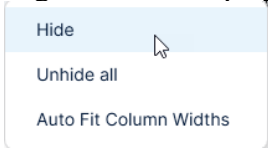
The Data table view is full of information; if you would like to work with a smaller data set, you can utilize the hide feature. To hide columns, take the following steps:

- Hover over the desired field:



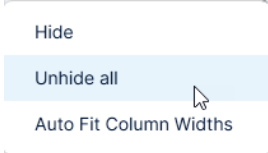


2. Right click to display the “Hide” option:



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

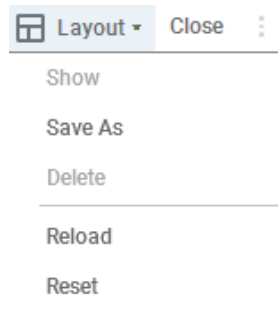
4. Similarly, take the above steps to “Unhide” the columns:



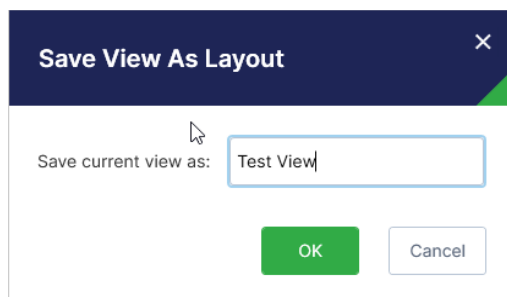
### Saving Data Table View Layout

A user can customize the Data Table View layout. Once the view is organized based on the available features (starting on [Page 39](#)), 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.

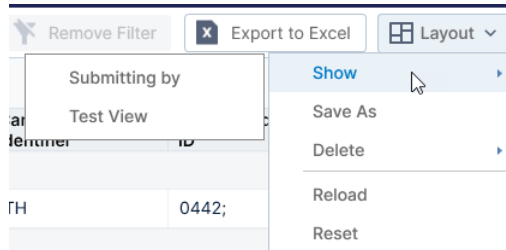


---

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

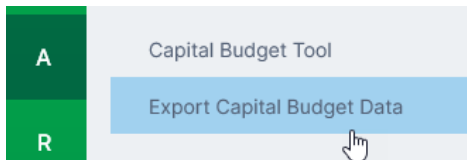


## Export Capital Budget Data Application

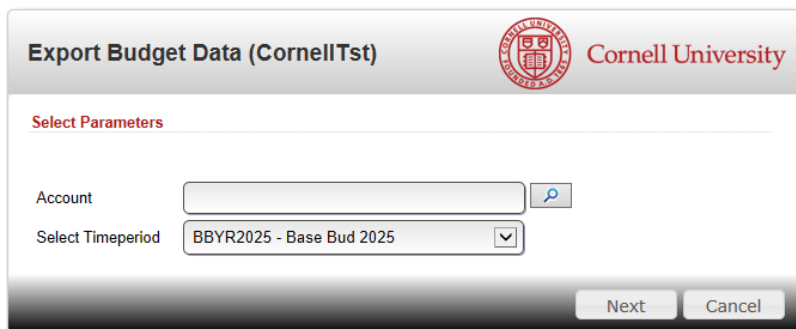
The Export Capital Data application is an application designed to allow users the ability to export all Capital Requests and Proposed Needs at the College or Administrative Unit level.

### Launching the Export Capital Budget Data Application

- To begin, single click the Export Capital Data Link:



- This will launch the Export Capital Data selector window:



- To search for your College or Administrative Unit, use the Search Icon to navigate the hierarchy. Refer to [Using the Search Icon](#), for further details.



- 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.
- 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:

C\_0100\_C\_BBYR2022.csv and Space\_UNIV\_000\_C\_FBYR2017.csv

- Excel will now launch automatically with the data loaded.
- 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.**

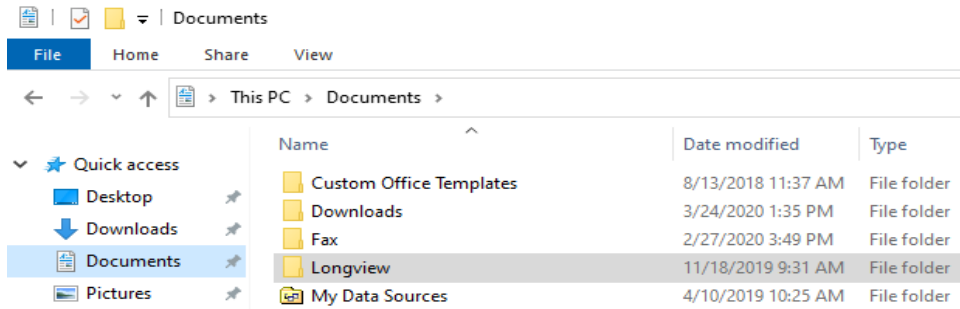
**Note: If you are exporting the same data area, you must save the first file, or the export will result in an error.**



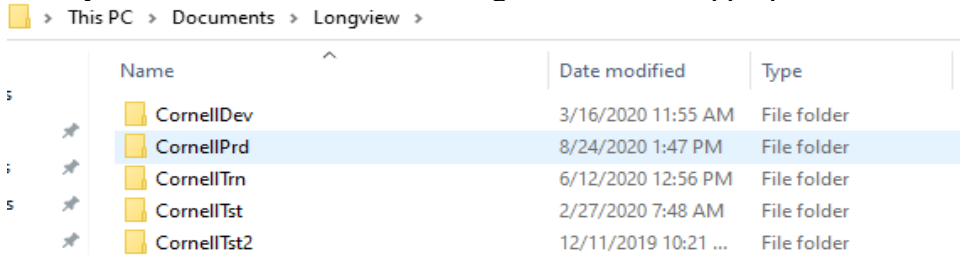
## Viewing the Export Capital Budget Data Application Data

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

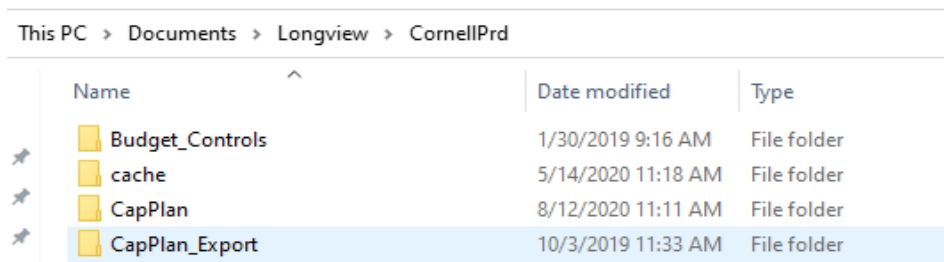
1. From your desktop, open your Documents Folder to view your Longview Folder:



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, C\_ORG CODE\_C or C\_ORG CODE\_R. or Space. See previous bullet 5 on page 44.
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 (.xlxs).



---

## Audit Reports

---

**Purpose:** The Division of Budget and Planning request assistance from the Colleges/Unit with reviewing the workflow of projects through the various statuses within the Longview Capital Budget Tool. Colleges/Units should audit submissions each budget cycle before system closure and at any time records are updated throughout the year.

Status updates outside of the capital budgeting cycle can be submitted to the capital budget and planning EGA: [cp-help@cornell.edu](mailto:cp-help@cornell.edu).

**Overview:** 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](mailto:cp-help@cornell.edu) and request the change with clear identification of the project name, the current project status, the proposed project status and an supporting explanation. Note: ALL status changes require an explanation. During the budget cycle, changes should be submitted to the capital budget administer using the status audit template provided to all users. This template can also be obtained by clicking on the link: [Status Change Request Template](#).

### College/Unit Expectation:

Any time a record is changed, especially when it is moved from one status to another, the College/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 to ensure project data is being accurately represented in the capital budget and/or plan.

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. Only records that anticipate a FPAR authorization in the current fiscal year, should remain in *Approved* status at the end of the initial submission period (Round 1).

Where should my project go?

#### Authorized Status:

- If you expect that one or more FPARs will circulate against these items before the end of the current fiscal year, then the capital budget 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.

#### Capital Plan Review Status:

- 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 budget variance request.

**Proposed Need Status:**

- 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.

**Subsumed By Status:**

- 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.

**Annulled Status:**

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

**Authorized Status**

Review *Authorized* projects:

- Spend in the current fiscal year should be greater than 0.
- Authorized Budget to Date should be greater than 0.
- Authorized Budget to Date should be less than the Project Value.
- Projections through FY##### should be less than Authorized Budget to Date.
- Is spending complete within the current fiscal year? Confirm the eBuilder status of the project. Is it 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 Projections through FY#####.
- Authorized to Date should be less than or equal to the Project Value.
- If the Authorized Budget to Date is less than the Project Value, then sources beyond the current fiscal year should be included.
- Expenditures should be included for at least one upcoming fiscal year.

**Note: Beginning with FY 2025 budgeting, projects should not be moved to close-out status from Authorized status unless the eBuilder status is set to close-out. This will assist with variance tracking and monitoring as well as budget alignment.**





## 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.
- Projections through FY##### 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 *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 1<sup>st</sup> 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 Projections through FY#####.
- 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.

## 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.
3. If this status contains stale project status, use the Status Change Request template, to move the request to Unit-Delete status.



### 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.

*Note: Beginning with FY 2024 Capital Budgeting, portfolio entries no longer exist. This status will be maintained for historical purposes, as we phase out prior year portfolio entries.*

### 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 – 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](mailto:cp-help@cornell.edu) to request a status change to *Authorized* or *Close-Out* depending on its eBuilder status and follow the guidance above.
- Will the project be active within the current fiscal year? Send an email to [cp-help@cornell.edu](mailto:cp-help@cornell.edu) to request a status change to Capital Plan Review and follow the guidance.

### Holding Status

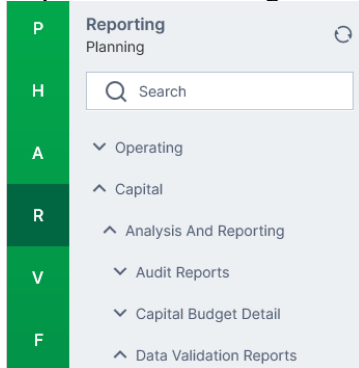
This status value is used for administrative purposes. Project held in Holding status have been approved and/or authorized in-between budget cycles. If a project is held within this status and your College/Unit would like to request a change, submit a request to: [cp-help@cornell.edu](mailto:cp-help@cornell.edu).

Status definitions are linked [here](#).

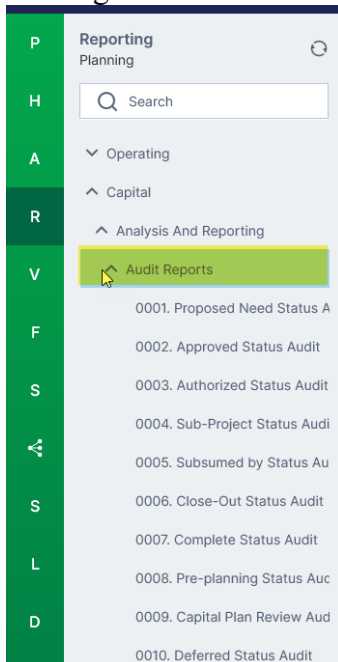


## Accessing Reports in Longview

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

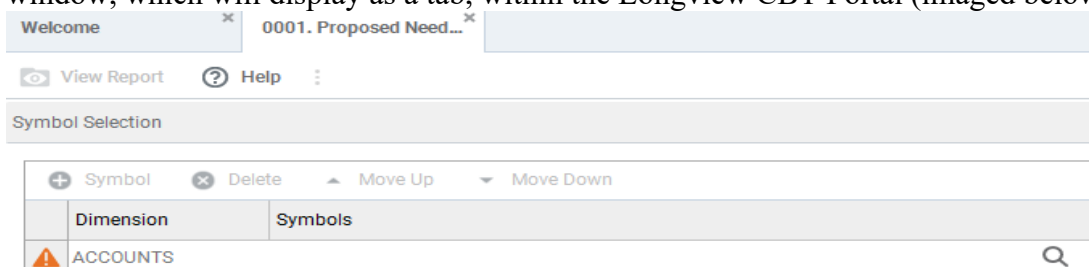


Under Capital, users can access **Capital Audit Reports** and **Capital Budget Detail Reports**, by clicking the arrow under Analysis and Reporting.



### 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 CBT 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 11):

- For Submitting View, click on the downward arrow 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.**

The screenshot shows a window titled "Symbol Selector" with a search bar and a list of accounts. The list is expanded to show sub-accounts under "UNIV\_000 - Cornell University". The sub-accounts are: "UNIV\_000\_C - Capital Submitting Orgs", "UNIV\_000\_EN - Total Endowed", "UNIV\_000\_CC - Total Contract", "UNIV\_000\_POS - Univ\_000 Position Data", and "UNIV\_000\_R - Capital Responsible Orgs". The "UNIV\_000\_C" and "UNIV\_000\_R" items are highlighted in yellow. Below the list, there are tabs for "Selected Symbols" and "Search Results", and a table with columns "Name" and "Description". At the bottom right, there are "OK" and "Cancel" buttons.



Once the org is selected, select “View Report” from the report window.

The screenshot shows a web application interface. At the top, there are two tabs: 'Welcome' and '0001. Proposed Need...'. Below the tabs is a navigation bar with a 'View Report' button (highlighted in yellow), a 'Help' button with a question mark icon, and a vertical ellipsis menu icon. Below the navigation bar is a section titled 'Symbol Selection'. Underneath this section is a table with a toolbar above it. The toolbar contains icons for '+ Symbol', 'x Delete', '▲ Move Up', and '▼ Move Down'. The table has two columns: 'Dimension' and 'Symbols'. The first row of the table is highlighted in light blue and contains the text 'ACCOUNTS' in the 'Dimension' column and 'C\_6500\_C - Budget and Planning' in the 'Symbols' column. A yellow search icon is located in the bottom right corner of the table.

Dimension	Symbols
ACCOUNTS	C_6500_C - Budget and Planning