

Capital Planning

Welcome to Capital Planning

Capital Planning is a web-based application that allows facility managers and analysts to organize, analyze, and act upon facility condition assessment information. It will also facilitate the building of capital plans required to address short and long-term facility needs. It is the second step of a two-step process known as Facility Condition Assessment.

Capital Planning will take deficiency information collected from the Facility Assessment Survey Tool (step 1 of the 2-step process) and allow facility managers and/or analysts to review it and decide on a course of action to address it. Using this information, facility managers and/or analysts can do one of several things:

- Assign the deficiency to a correction
- Price the correction
- Organize multiple deficiencies/corrections into projects
- Create work orders

Before you start Capital Planning

After you have entered the SiteNet URL, answer **YES** to all prompts that appear. (Capital Planning has several controls to download before it will start. Click in the **Always trust content** box to bypass these messages.)

Using Capital Planning

There are four levels of security for Capital Planning. Security is set up within Capital Planning and in SiteNet Manager.

Levels of Security

Level 1 is the highest level of security and Level 4 is the lowest. Each level can do any functionality allowed by levels lower than itself.

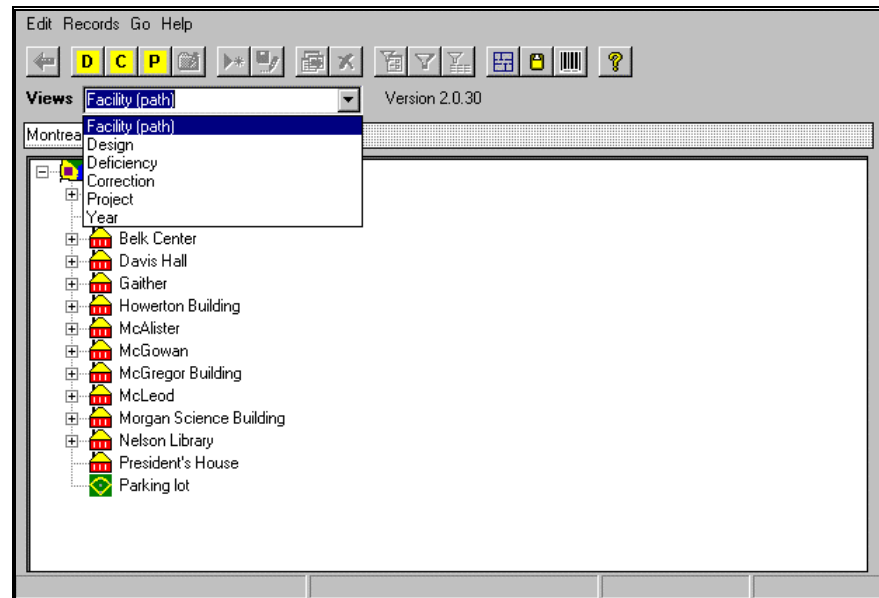
Level 1 -- delete, edit, add, and view records

Level 2 -- edit, add, and view records

Level 3 -- add and view records

Level 4 -- view records

Capital Planning Views

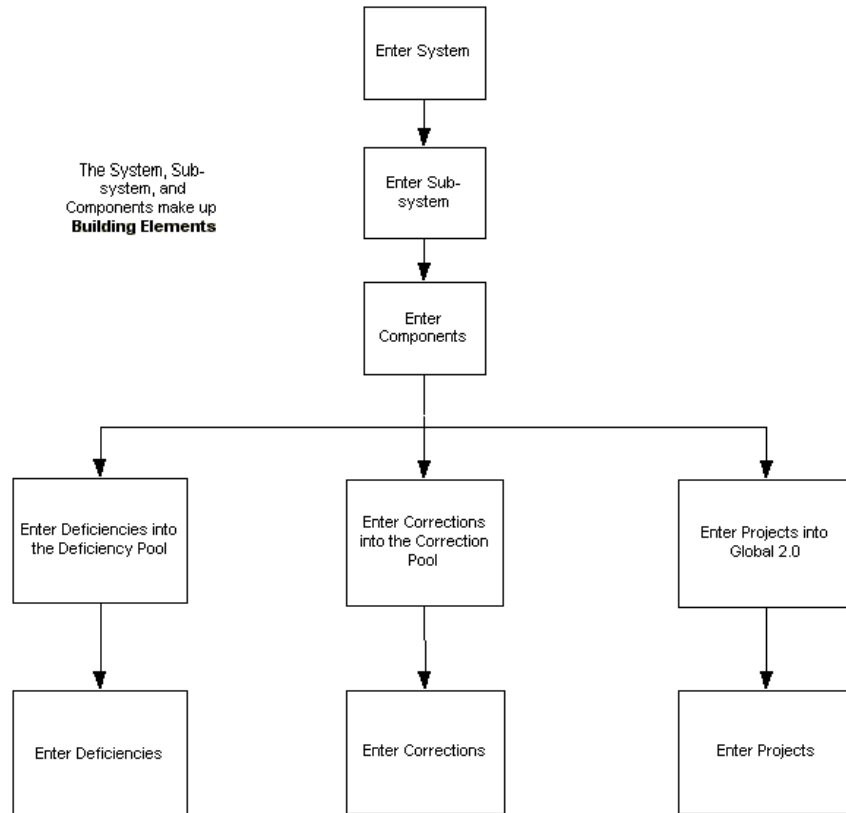


There are several views in Capital Planning:

- **Design view** -- allows the user to design the relationships between Project, Correction, and Deficiency information. This view displays the Path Names as well as the Deficiencies, Corrections, and Projects associated with each path. This will be the primary working view.
- **Deficiency view** -- allows the user to quickly access deficiency information based upon location. This view displays Path Names based upon a Path Type hierarchy and also displays the Deficiency Name(s) associated with each path.
- **Correction view** -- allows the user to quickly access correction information based upon location. This view displays Path Names based upon a Path Type hierarchy.

- **Project view** -- allows the user to quickly access project information based upon location. This view displays Path Names based upon a Path Type hierarchy.

How to Use Capital Planning: A Flowchart



Quick Steps to Using Capital Planning

For a quick reference guide to using Capital Planning, refer to the steps below. For a process flowchart detailing how to use Capital Planning, refer to How to use Capital Planning: A Flowchart.

1. Enter **Building Elements**.
2. Enter **Systems**.
3. Enter **Sub-systems**.
4. Enter **Components**.
5. Enter **Deficiencies** into the Deficiency Pool, **Corrections** into the Correction Pool, and enter **Projects** into Global 2.0. These are the items that you will be able to select from when using Capital Planning.

6. Enter **Deficiencies, Corrections, Projects**, and selections from the items entered in Step 2 above into Capital Planning.

Building Elements

Building Elements is just one component of Capital Planning. Building Elements allows the user to drill down into categories for deficiencies and corrections in hierarchy fashion. This hierarchy can be seen in a treeview. Many deficiencies and corresponding corrections will be pre-defined, but users have the option of adding, deleting, and editing them. Basically, Building Elements works as shown below:

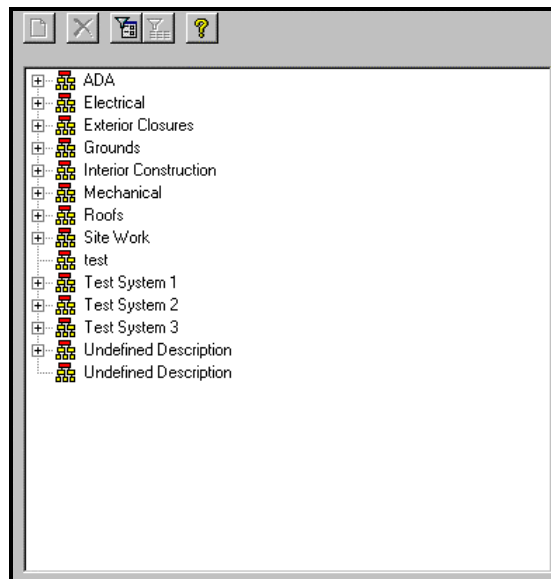
1. Enter a **System**.
2. Enter a **Sub-system**. The Sub-system further defines the System.
3. Enter a **Component**. The Component further defines the Sub-system.

For an overview of the entire process, refer to How to use Capital Planning and Quick Steps to Using Capital Planning.

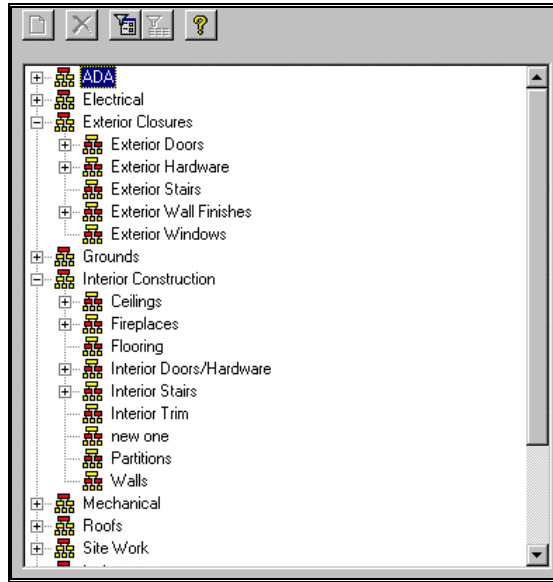
Entering Systems

To enter a System:

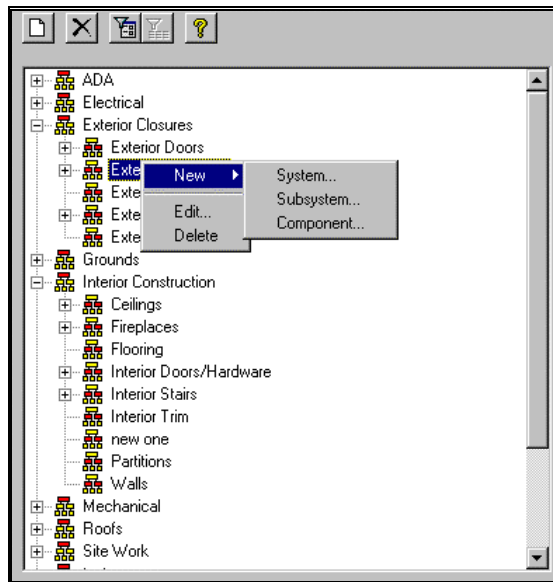
1. From the Main Menu Bar, click **Go → Building Elements**. The Building Elements treeview appears.



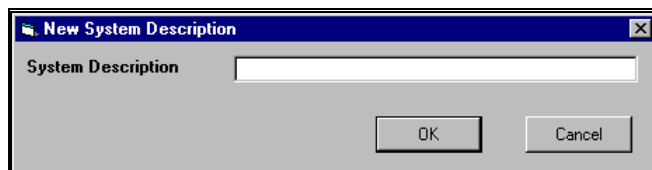
2. Expand the existing Systems.



3. Right-click to add a System.



4. Click **New** → **System**.



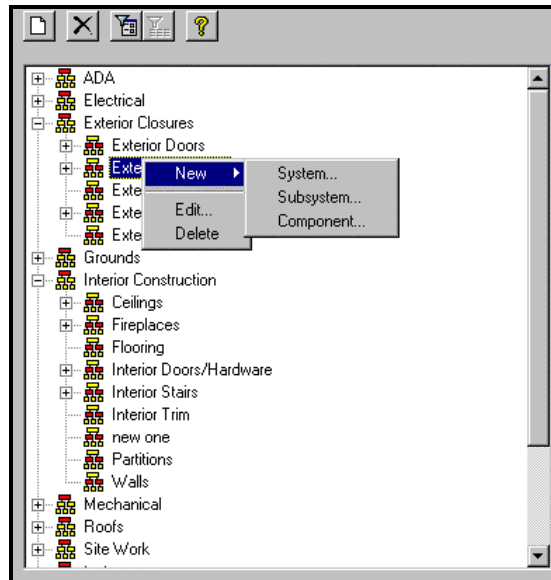
5. Add a **Description** (name) for the System.

6. Click **OK**.

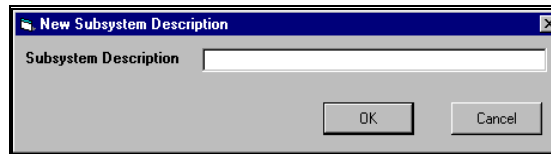
Entering Sub-systems

To enter a Sub-system:

1. From the treeview, click on the **System** for which you wish to enter a Sub-system.
2. Right-click to add a Sub-system.



3. Click **New** → **Sub-system**.



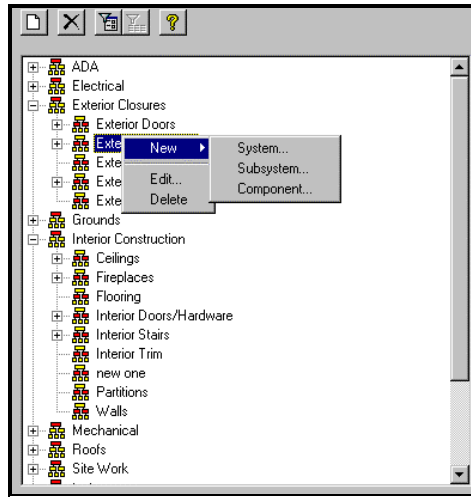
4. Enter a **Description** (name) for the Sub-system.
5. Click **OK**.

Entering Components

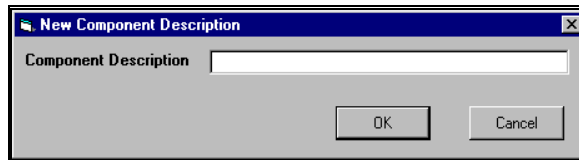
To add a Component:

1. From the treeview, click on the Sub-system to which you wish to add a Component.

2. Right-click to add a new Component.



3. Select **New** → **Component**.
4. Enter a **Description** (name) for the Component.

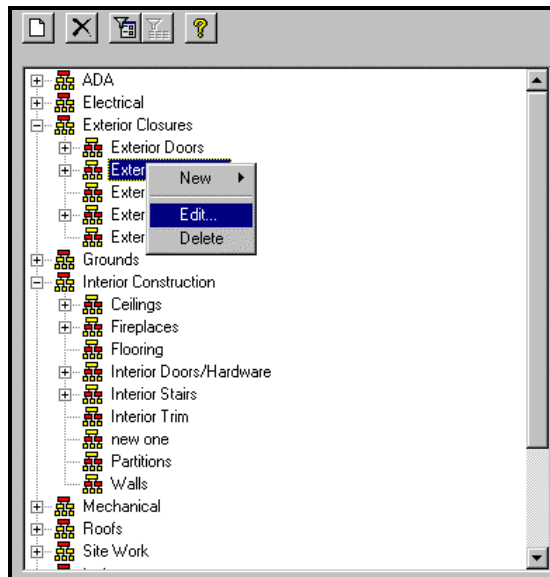


5. Click **OK**.

Editing Building Elements

To edit a building element description:

1. Click on the element you wish to edit.
2. Right-click and choose **Edit**.

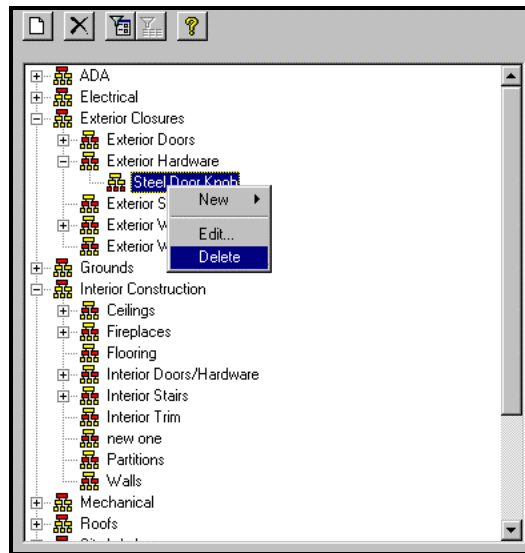


3. Edit the **Description**.
4. Click **Enter**.

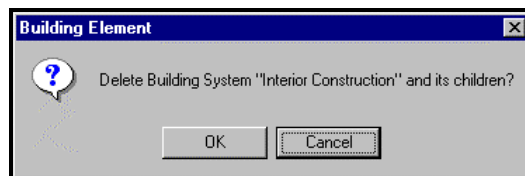
Deleting Building Elements

To delete a building element:

1. Click on the building element you wish to delete.
2. Right-click and select **Delete**.



3. Click **Yes** to delete the element and its children. **Note: Be cautious that you do indeed intend to delete its children.**



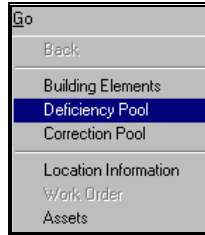
About the Deficiency Pool


The Deficiency Pool is a list of valid deficiencies that show up in the Deficiency drop-down boxes. In the Deficiency Pool, you add, edit, and delete deficiencies. Keep in mind that these deficiencies must be set up in the pool before they will show up in the Deficiency drop-down box.

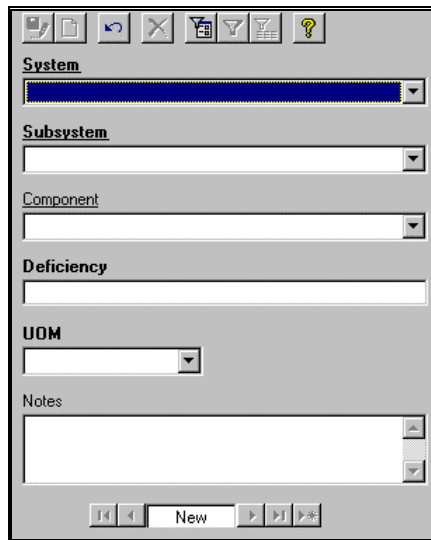
Adding New Deficiencies to the Pool

To add a new Deficiency:

1. From the Capital Planning menu bar, go to **Go → Deficiency Pool**.

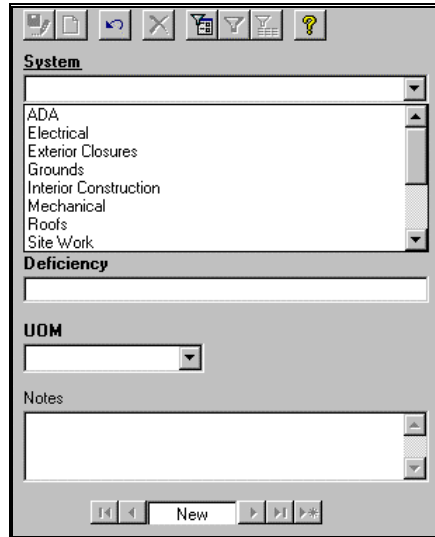


2. Click  to create a new record.

A screenshot of a software form for creating a new record. The form has a title bar with standard window controls and a toolbar with icons for save, undo, redo, and help. The form fields are: "System" (dropdown menu), "Subsystem" (dropdown menu), "Component" (dropdown menu), "Deficiency" (text input field), "UOM" (dropdown menu), and "Notes" (text area). At the bottom, there is a "New" button and navigation arrows.

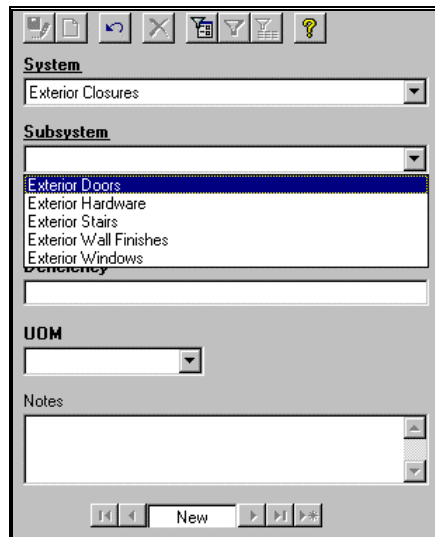
3. Select a **System** for the Deficiency.

Note: You can add new Building Elements (System, Sub-system, and Component) by double-clicking the underlined field label. Doing so will access the Building Element control where you can add new building elements.



The screenshot shows a software window titled "Deficiency" with a toolbar at the top containing icons for file operations and help. The main area is divided into sections: "System" with a dropdown menu showing a list of options (ADA, Electrical, Exterior Closures, Grounds, Interior Construction, Mechanical, Roofs, Site Work), "Deficiency" with a text input field, "UOM" with a dropdown menu, and "Notes" with a text area. At the bottom, there are navigation buttons and a "New" button.

4. Select a **Sub-system** for the Deficiency.



The screenshot shows the same "Deficiency" form window. The "System" dropdown menu is now set to "Exterior Closures". The "Subsystem" dropdown menu is open, showing a list of options: Exterior Doors, Exterior Hardware, Exterior Stairs, Exterior Wall Finishes, and Exterior Windows. The "Deficiency" text field, "UOM" dropdown, and "Notes" text area are visible below. The bottom navigation buttons and "New" button are also present.

5. Select a **Component** for the Deficiency. This field is not required.

The screenshot shows a software interface for entering a deficiency. At the top, there is a toolbar with icons for save, undo, redo, delete, and help. Below the toolbar are several dropdown menus: 'System' (set to 'Exterior Closures'), 'Subsystem' (set to 'Exterior Hardware'), and 'Component' (set to 'Steel Door Knob'). Below these is a text field for 'Deficiency' which is currently empty. Underneath is a 'UOM' dropdown menu, also empty. At the bottom is a 'Notes' text area with scrollbars. A 'New' button is located at the very bottom of the form.

6. Enter a name for the **Deficiency**.


A close-up view of the 'Deficiency' text field, which is currently empty and ready for input.

7. Select a **Unit of Measure** (UOM) for the Deficiency.

The screenshot shows the same software interface as before, but now the 'UOM' dropdown menu is open, displaying a list of units: '11 Gal', '15 Gallon', 'AC', 'EA', 'FT', 'JB', 'LF', and 'ON'. The 'AC' unit is currently selected and highlighted in blue. The 'Deficiency' text field now contains the text 'Knob missing'.

8. Enter any **Notes** for the Deficiency.

A close-up view of the 'Notes' text area, which is currently empty and ready for input.

9. Click  to save the record.


About Deficiencies

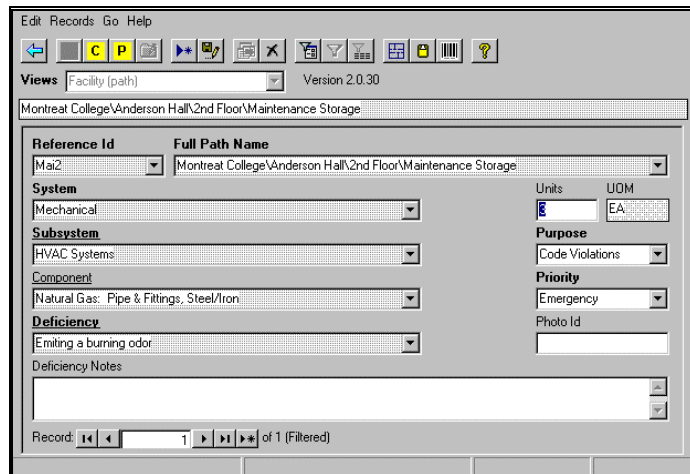
A Deficiency is something that is wrong, or lacking, in a location. For example, if a location is surveyed and the surveyor discovers a broken window or ripped carpet, they would report these as deficiencies. Deficiencies are generally aspects of a location that need to be fixed, or corrected.

Entering Deficiencies in Capital Planning


The Deficiency Form is used to create and view a deficiency for a particular path, correction, or project. The list of deficiencies that appear in the Deficiency combo-box field are a subset of all available deficiencies in the database based on System, Sub-system, and Component.

To enter Deficiencies:

1. Select the **path, Correction, or Project** for which you wish to create a Deficiency.
2. Click  to create a deficiency. The **Deficiency Form** appears.



3. If not protected, select the **Reference ID** or **Full Path Name** for which you wish to create a deficiency. The Reference ID or Full Path Name will automatically fill in if it is not entered.
4. Select the **System** for the Deficiency.
5. Select the **Sub-system** for the Deficiency.
6. Select the **Component** for the Deficiency. This field is not required.
7. Select the specific **Deficiency** that is to be noted for the location.

8. Enter any **Deficiency Notes**.
9. Select the **Purpose Code** to explain why the Deficiency exists.
10. Select the **Priority** to describe the level of urgency for the Deficiency.
11. Enter the **Photo ID** to indicate the photo exposure number. This also may be used to store the file name.
12. Click  to save the Deficiency.

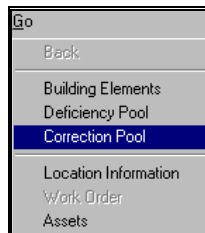
About Correction Pool


The Correction Pool is a list of valid corrections that show up in the Correction drop-down boxes. In the Correction Pool, you add, edit, and delete corrections. Keep in mind that these corrections must be set up in the pool before they will show up in the Correction drop-down box.

Entering New Corrections in the Correction Pool

To enter a Correction:


1. On the Capital Planning main menu, go to **Go → Correction Pool**.



2. Click  to create a new record.
3. Select a **System** for the Correction.

Note: You can add new Building Elements (System, Sub-system, and Component) by double-clicking the underlined field label. Doing so will access the Building Element control where you can add new building elements.

4. Select a **Sub-system** for the Correction.
5. Select a **Component** for the Correction. This field is not required.
6. Enter a name for the **Correction**.
7. Select a **Unit of Measure** (UOM) for the Correction.

8. Enter a **Correction Cost** for the Correction.
9. Enter any **Notes** for the Correction.
10. Click  to save the record.


About Corrections

A Correction is a fix for a Deficiency. For example, if a location is surveyed and the surveyor discovers a broken window or ripped carpet, they would report these as deficiencies. Possible Corrections for these Deficiencies would be to fix the window or replace the carpet.


Entering Corrections in Capital Planning

The Correction Form is used to create and view corrections for a particular path or Deficiency. The list of corrections that appear in the Correction combo-box field are a subset of all available corrections in the database based on System, Sub-system, and Component.

To enter Corrections:

1. Select the path or Deficiency for which you wish to create a Correction.
2. Click  to create a correction. The **Correction Form** appears.

3. If not protected, select the **Reference ID** or **Full Path Name** for which you wish to create a correction. The Reference ID or Full Path Name automatically fills in if it is not entered.
4. Select the **System** for the Correction.
5. Select the **Sub-system** for the Correction.

6. Select the **Component** for the Correction. This field is not required.
7. Select the specific **Correction** that is to be noted for the location.
8. Enter any **Correction Notes**.
9. Select the **Purpose Code** to explain why the Correction is needed.
10. Select the **Priority** to describe the level of urgency for the Correction.
11. Enter the **Photo ID** to indicate the photo exposure number. This also may be used to store the file name.
12. Select **Units** based on deficiencies if the number of units should strictly be the sum from all the associated deficiencies.
13. Select **Custom Cost** if the amount in the cost field has been entered by the user and should not change based on the assigned deficiencies.
14. Enter an **Adjustment Factor** for the Correction. This is a multiplier that is used to adjust the cost based on special circumstances for the correction. **The multiplier must be greater than 0.**
15. Enter the **Units** to be used. This figure is based on the UOM.
16. Enter the **Cost of the Correction** if not satisfied with the default.
17. Click  to save the Correction.

About Projects and Global 2.0

You can assign corrections to projects that reside in Global for Windows. You must enter projects into Global before you can use them in Capital Planning. This allows you to track Capital Planning projects as you would any other Global project. For more information on Global, refer to the *Global User's Guide*.

Entering Projects in Global 2.0

To enter a project in Global 2.0:

1. Open **Global 2.0**.
2. Click **Projects** from the Projects Form.
3. Enter an ID number for the project in **Project ID**.

4. Enter a name for the project in **Project Name**.
5. Enter the name of the project lead in **Project Lead**.
6. Enter a description for the project in **Project Description**.
7. Enter any notes for the project in **Notes**.

For more information on Global 2.0, refer to the *Global 2.0 User's Guide*.


About Projects

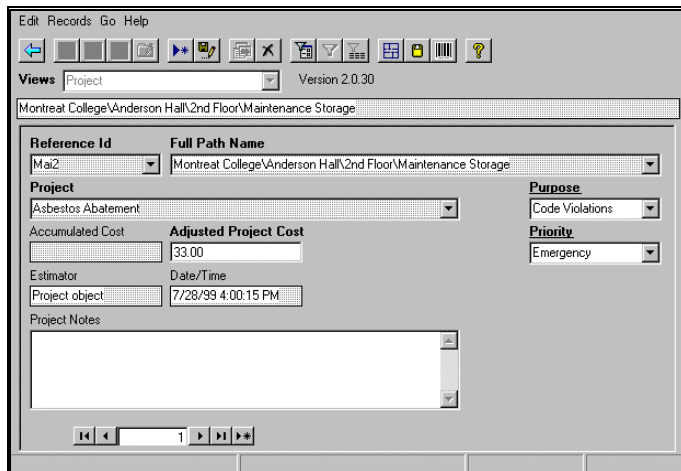
Capital Planning stores additional information on Global projects, such as adjusted costs, priority, and purpose code. Capital Planning projects can also be tracked within Global.

Entering Projects in Capital Planning


The Projects Form is used to create and view a project for a particular path. The list of projects available is taken from projects entered in Global 2.0.

To enter Projects:

1. Select the path for which you wish to create a project.
2. Click  to create a project. The **Project Form** appears.



3. If not protected, select the **Reference ID** or **Full Path Name** for which you wish to create a project. The Reference ID or Full Path Name automatically fills in if it is not entered.
4. Select the name of the **Project**.
5. Enter an **Adjusted Project Cost** (if not satisfied with the default) for the project.

6. Enter any **Project Notes**.
7. Select the **Purpose Code** to identify why the project is needed.
8. Select the **Priority** to indicate the level of urgency for the Project.
9. Click  to save the Project.