

**2004-2010 CAPITAL PLANNING SYSTEM  
USER MANUAL**

**State-Owned Property Administered by the Agency**  
**(Form SYP-B4a)**

Upon choosing Form SYP-B4a from the **SELECT OPTION** page, a listing of all State-Owned Property Administered by the Agency that have already been entered into the system will be displayed in order by Installation Name. This display also reflects the Installation Number, Facility Name, Facility Number, and County. The listing is based on information from Form SYP-B4a.

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

- Retrieve the detailed data for a specific facility to review and/or edit
  - *Select [Edit] next to the desired facility*
- Add a new entry and the accompanying detailed data
  - *Select [Add New Item] at the bottom of the page*
- Search for and display the facility with a specific Facility Number
  - *Enter that number in the space provided above the facility list and press [Search]*
- Return to the complete facility listing after the Search list has been displayed
  - *Press [Reset] above the facility list*
- Sort and display the list based on any of the headings/categories that are shown
  - *Click on the heading that is to be the basis of the sort*
- View and/or print the detailed data for a single facility
  - *Select [View] under the Reports column*

Note: Changes to the data or the deletion of an entire facility can be done only by accessing the relevant Form SYP-B4a form. Changes or deletions cannot be made directly to this listing.

**NAVIGATING THE LISTING**

If there are more than 15 facility entries, they will be listed on multiple pages (15 per page). Up to 10 pages will be identified at the bottom of the screen of the selected page, click on the ellipse (. . .) to go to pages other than the 10 listed. The bottom of the page will also display the total number of pages and the current page number (Viewing page \_\_ of \_\_).

**ENTERING DATA**

To move between fields on Form SYP-B4a, use the <Tab> key or the mouse.

After completing the data entry, selecting [Save Changes] will save the information to the database if all required data have been entered (see Required Data Fields below). The other

option at this point is to [Cancel] which returns the user to the property listing, without saving any new or changed data.

### PRE-POPULATED DATA

For agencies that had State-Owned Property Administered by the Agency in their 2002-2008 capital plans, Form SYP-B4a has been pre-populated with those data. These data need to be carefully reviewed and revised/updated where appropriate.

To facilitate review of the pre-populated data, a summary report may be printed as follows:

- On the **SELECT OPTION** page, choose “View/Print Reports” under Agency Level Reports
- Select [View Report] next to “State Owned/Agency Administered Property-Summary Report”

To change data for one or more specific facilities, return to the listing as described above. The [Search] option can assist in locating a specific facility - enter the Facility Number in the search box and click [Search].

A new item on Form SYP-B4a asks whether there are any “*Other Occupants*” of the facility other than the reporting agency. Each property in the *pre-populated data has been defaulted to a “no” response* to address the majority of instances. If there are, in fact, other occupants, the agency must switch this to the “yes” response and provide the additional information that is required. (See Entering “Other Occupant” Information below.)

### TYPES OF DATA

Data on Form SYP-B4a are comprised of yes/no responses, selections from picklists, text, and numeric entries.

- |           |   |
|-----------|---|
| Yes/No    | Click to fill in the circle to the left of the Yes or No response. (If “yes”, be sure to provide any additional explanation or other information that is required.) |
| Picklists | Click on the down arrow to the right of the data entry field to access the options.   |
| Text      | Enter text as in a word processing application. Use the up and down arrows to view contents of the field.   |
| Numbers   | Enter figures with or without commas (,); commas will be inserted automatically.  |

### DELETING AN ENTRY

To delete a property, select [Edit] from the Form SYP-B4a listing then select [Delete] at the top of the page. The user will be prompted to confirm that the intent is to remove the property.

### ENTERING “OTHER OCCUPANT” INFORMATION

If the response to “Are there any occupants of the facility other than the reporting agency?” is “yes”, the [Save Changes] instruction will take the user to another listing of all of the Other Occupants that have already been entered into the system. Selecting “Add New Item” at the bottom on this page will allow for a new entry to be added.

The listing operates like the overall property/facility listing except that 1) there is no search option, and 2) detailed reports cannot be viewed here. (The Other Occupant information can be seen on the detailed report for the facility in which they are located.) Additionally, from this point, the user may return to the State-Owned Property List.

### REQUIRED DATA FIELDS

A Facility Name must be entered in order for the system to accept the [Save Changes] instruction on Form SYP-B4a. For the system to [Save Changes] on the Other Occupant information, the Name of Other Occupant field must be completed.

Before the cabinet/agency contact can submit the completed agency plan to CPAB, the system will run a series of checks to ensure that all required data fields have been completed. The plan will not be submitted unless all required fields are completed. Items that will be checked on Form SYP-B4a are as follow:

- Has the “County” field been completed?
- Has the “Primary Use” field been completed?
- Has the “Condition” field been completed?
- Has “Square Footage” or “Acres” field been completed?
- Has yes or no been selected for “Are there any occupants of this facility other than the reporting agency.” If yes is selected, at least one “Other Occupant” form been completed?

Items that will be checked on the Other Occupants form are as follow:

- Has the “Type of Entity” field been completed?
- Has the “Square Footage Occupied” field been completed?
- Has the “Original Start Date” field been completed using the format specified?
- Has the “Expiration Date” field been completed using the format specified?
- If the “Agreement Number” or “Annual Rent” field is blank, has the “Other Explanation” field been completed?

### PRINTING REPORTS

In addition to the ability to print data for individual facilities from the listing, summary reports can be printed by choosing “View/Print Reports” under Agency Level Reports on the **SELECT OPTION** page. Options are available here to print the following

- State Owned/Agency Administered Property – Summary Report
- State-Owned/Agency Administered Property - Summary Report of “Other Occupants”

All reports are provided in PDF, which requires the Adobe Acrobat Reader. (This software may be downloaded from the capital planning system **HOME** page.)