



Capital Funding Request Management System (CFRMS) User Training June 28-30th, 2021

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Training Objective for Today



- Provide an overview of CFRMS, and the information necessary for you to:
 - Submit a new capital request form (*this phase of the annual cycle has closed*) (<u>Note</u>: All FY21 forms for FY23 have been entered, and all documents have been uploaded)
 - Locate and review your FY21 capital request form(s)
 - Manage your institution and building documents and data

We will walk through a job aid and provide two short demonstrations.

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Course Outline

Introduction

- Part I Overview
- Part II How to Login

Capital Request

- Part III How to Submit a Capital Funding Request Form
- Part IV How to Review and Edit a Capital Funding Request Form
- Part V How to Upload Additional Capital Request Documents
- Demonstration

Institution Data

- Part VI How to Add/Delete/View Institution Documents
- Part VII How to Add/Edit/View Institution Data
- Demonstration

Wrap-up

- Part VIII How to Request Help
- Part IX Actions
- Part X Login and Review Forms and Data







Part I – Overview

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Discussion Topics

- What is the Purpose of CFRMS?
- The Challenge in Selecting Capital Requests
- Traditional Approaches (that we are not using)
- What is CFRMS?
- What is the Analytic Hierarchy Process (Information only)



What is the Purpose of CFRMS?



This purpose of CFRMS is to establish a more objective scoring process and enable the NMHED to develop incentives for institutions to program projects consistent with state goals for higher education.

The Challenge in Selecting Capital Requests



Selecting capital requests is *complex* because it requires:

- Determining the relative importance of decision criteria
- Using qualitative and quantitative criteria
- Consideration of other factors (e.g., portfolio mix and balance)
- Evaluation of many requests by multiple people
- Building consensus

Part I – Overview

Traditional Approach #1 – Stickies on a Wall





• An inconsistent evaluation approach that leads to circular conversations, less accurate decisions, and capitulation.

Part I – Overview

Traditional Approach #2 – BOPSAT



• A bunch of people sitting around a table (BOPSAT) leads to groupthink, and the highest-paid person or the person with the loudest voice making the decisions.



Traditional Approach #3 – Spreadsheet Magic



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			-	-	-	
Total	\$ 184,040	\$ 26,000	\$ 26,000	\$ 26,000	\$ 26,000	\$ 26,000
n Government Cost	\$ 278,091	\$ -	\$-	\$-	\$-	\$-
overnment Cost	-	-	-	-	-	-
on Government Cost	\$ -	\$ 53,842	\$ 55,565	\$ 24,911	\$ -	\$ -
Total	\$ 278,091	\$ 53,842	\$ 55,565	\$ 24,911	\$ -	\$-
entation Cost	\$ 436,131	\$ -	\$ -	\$ -	\$ -	\$-
ion Cost	\$ -	\$ -	\$ -	\$ -	\$ -	\$-
entation Cost	\$ 26,000	\$ 79,842	\$ 81,565	\$ 50,911	\$ 26,000	\$ 26,000
Total	\$ 462,131	\$ 79,842	\$ 81,565	\$ 50,911	\$ 26,000	\$ 26,000
Government FTEs	2021	2022	2023	2024	2025	2026
n Government FTEs	1.38	0.00	0.00	0.00	0.00	0.00
overnment FTEs	0.00	0.00	0.00	0.00	0.00	0.00
on Government FTEs	0.00	0.23	0.23	0.08	0.00	0.00
Total	1.38	0.23	0.23	0.08	0.00	0.00
evelopment	This table helps to spre	ad contractor costs (estir	nated by Pre-Implement	ation, Implementation, a	nd Post-Implementation)	by GFY.
by Phase and by Fiscal Year	2021	2022	2023	2024	2025	2026
'n	100%	0%	0%	0%	0%	0%
	0%	46%	46%	8%	0%	0%
welepment	This table bolns to spre	ad government costs (os	timated by CEV) by Pro-	Implementation Implem	ontation and Post-Imple	montation
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on					•	00%
Total	100%	100%	100%	100%	100%	100%

Part I – Overview



What is CFRMS?

What is CFRMS?



- CFRMS is a configured instance of Definitive Pro[®], our software as a service (SaaS) solution that includes:
 - A *portal* to submit capital funding requests
 - A *financial business case template* (future training session)
 - A state-of-the-art *prioritization capability*, which uses the leading methodology for multi-criteria decision making, the Analytic Hierarchy Process (AHP)
 - CFRMS aggregates NMHED committee member inputs and synthesizes qualitative and quantitative data to *accurately calculate priorities*
 - A leading *mathematical programming solver (i.e., optimizer)* to help the NMHED committee take other factors into consideration and find the most favorable set of capital requests that *optimize the allocation of funding resources*

What is CFRMS? (cont.)



- 1. Capital Request (data and textual information)
- 2. Solution Approach (textual information)
- 3. Resource Dependencies (identification of resources required to deliver)
- 4. Forecast (5-year cost and benefit projections; option to discount of cash flows)
- 5. Results (auto-calculated financial metrics, visual charts and graphs) Read Only
- 6. Documents (stores documents associated with the form, and institution and building documents)
- 7. Lookback (for tracking and analyzing changes over time; saves up to 25 baselines) *Read Only*
- The business case incorporates:
 - Technology Business Management (TBM) cost pools on the "Forecast" tab
 - Financial hurdle rates and pass/fail indicators on the Results tab

Subject of a future training session

What is CFRMS? (cont.)

- CFRMS can help teams *build consensus* and make *complex multi-criteria decisions* for the following use cases:
 - Academic Program Prioritization
 - Application Migration to the Cloud
 - Budget Formulation
 - Business Opportunity Selections
 - Business Partner Selections
 - Capital Request Management
 - Climate Action Plan

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- COVID-19 Opening Strategies
- IT Demand Management
- Merger & Acquisition Selections

- Organizational Cost Savings
- Organizational Design
- Personnel Selections
- Product and Feature Selections
- Requirements Prioritization
- Risk Assessments
- Strategic Investment Selections
- Strategy Development
- Technology Selections
- Vendor Selections

Our scope and focus is on Capital Request Management.





Part I – Overview



The Analytic Hierarchy Process (AHP) (Information Only)

The Analytic Hierarchy Process (AHP)



- Introduced in the 1970s by Thomas Saaty.
- It is now considered to be the *world's leading multi-criteria decision-making methodology*, per Gartner Inc. It was developed to help work through complicated, realworld prioritization scenarios.
- *Widely used in the military, government, private sector, and academia* to determine priorities and establish weighting factors and has become the gold standard for multicriteria decision making (MCDM).
- Based on mathematics and psychology. It simplifies the process of weighting the decision criteria by comparing two criteria at a time (i.e., *pairwise comparisons*) to determine which is more important with respect to the decision goal – and by how much.
- Without AHP, decision-makers are left to simply guess their relative importance.

Structure of a Decision Model





Part I – Overview

NMHED Scoring Rubric





NEW MEXICO HIGHER EDUCATION DEPARTMENT

Capital Funding Request Management System



Email:

lb l



Part II – How to Login

How to Login

- 1. Access via a web browser: <u>https://www.DefinitivePro.com/NM.aspx</u>
- 2. Enter your email address and click "Next".



3. Enter your password and click "Login".



4. Receive your 4-digit PIN via your email account.

(Later, you can enter your smartphone number in your profile for future use.)

5. Enter your 4-digit PIN and click "Submit".





smartphone

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Part II – How to Login

System Notification





William Bonney (Training) 🗢

You are accessing a State of New Mexico information system. In accessing this system, you agree to use this system for authorized purposes only and acknowledge that you have no reasonable expectation of privacy regarding the communications or information it displays, processes, stores, or transmits. Information system use may be monitored, recorded, and audited.

Unauthorized, or improper uses are prohibited, and subject to criminal, civil, and administrative penalties. System communications or information may be intercepted, searched, seized, and disclosed or used for any lawful government purpose. Your use of this information system indicates consent to these terms.





Capital Requests Part III – How to Submit a Capital Request

This phase of the annual cycle has closed.

Display Your List of Capital Requests

Vi	ew Portfolios			7			NEW MEXIC HIGHER EDUCA DEPARTMEN Fostering Student	O TION IT Success from Cradle to Career
2	ge System 🗢	Manage Portfolio 🗢	3					William Bonney (Training) 🗢
		Manage Critieria						
	Enterpr	Manage Alternatives	folio Manager	Portfolio	View	Portfolio Role	Active	Last Modified
	State of Education	Manage Team	ald Hoehne	Capital Funding Request Management System 2021 for FY23	Capital Requests	Request Manager	Yes	06-26-2021 03:35 PM

• <u>Option 1</u>:

- 1. Click the "Capital Requests" link in the "View" column for the desired portfolio -- OR
- <u>Option 2</u>:
 - 2. Select the desired portfolio: "Capital Funding Request Management System 2021 for FY23".
 - 3. Click the following menu item: Manage Portfolio → Manage Alternatives

(Note: Once inside the portfolio, the "Manage Alternatives" menu item will change to "Manage Capital Requests")

Display Your List of Capital Requests

Portfo Manage S	olio: <u>Capit</u> System ©	<mark>al Fun</mark> Man	ding R age Port	<mark>equest Manage</mark> tfolio ⊙	ement System 20	2 <u>1 for FY23</u>			NI HIGH DE Fost	EW MEXICO IER EDUCATIO EPARTMENT tering Student Succe	N ess from Cradle to Career William Bonney (Training) ©
Manage Cap	oital Reques	ts									
				Action	~	Show: Business Case Status Vor Return (\$) ROI (%)	kflow Status Descriptio	n Lead Sponsor 🖌 Co Discounting Limited Access	st 🖌 Benefit 🗌 Multi-Year	r 🖌 Decision	
Business Cas	e Views		[Default		Run View Manage Views					
View D	ashboard		s	ubmit a New Capita	Request	— <u>(1</u>)				(Export Capital Requests
Select All											
	ID	Ú	(3)	Status	Workflow Status	Capital Request	View		Cost	Benefit	Decision
	003	Ú	Î	Pending Start		UNM - Technology Infrastructure Upgrades	Business Case	<u>(copy link)</u>		\$0	Pending
	002	Ú	Î	Pending Start		UNM - Lab Safety Improvements	Business Case	<u>(copy link)</u>		\$0	Pending
	001	Ú	ß	Pending Start		UNM - Main Campus, Albuquerque, New Mexico	Business Case	<u>(copy link)</u>	101,000,000	\$0	Pending

1. Click the "Submit a New Capital Request" button.



Part III – How to Submit a Capital Request

Select an Institution and Enter a Project Title

Portfolio: <u>Capital Fundin</u>	g Request Management System 2021 for FY23	NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢 🛛 Manage	Portfolio 🗢	William Bonney (Training) 🗢
Capital Request Entry		
Before completing the project eval	uation form, please review the NMHED Instruction manual for Annual Capital Outlay Funding Requ	ests. The manual provides specific guidance on what should be provided for each measure.
Instruction Guide		
Institution	University of New Mexico	∠ ← (1)
Project Title	Aerospace Studies Building Renovation	
	Cancel Start Capital Request Form >>	2
	3	1. Select your institution.
		2. Enter a short descriptive title.
		2 Click "Start Capital Paguast Form"
		5. CIICK Start Capital Request Form .

Complete the Capital Request Form

Portfolio: <u>Capital Fu</u>	unding Request Management Syste	em 2021 for FY23				NEW MEXICO HIGHER EDUCATION DEPARTMENT
	Complete each field	in accordance with the N	MHED Inst	ruction Man	nual	Fostering Student Success from Cradle to Career
Manage System 🗢	for Annual Capital C	Outlay Funding Requests		•" fo waa		William Bonney (Training) 🗢
• Capital Request Entry	Scroll down to see tr	he remainder of the Cap	tal Reques	t form.		
Before completing the proje	ct evaluation form, please review the NMH	ED Instruction manual for Annual Capital Outlay Fu	nding Requests. The m	anual provides specific g	guidance on wh	at should be provided for each measure.
Instruction Guide						
Institution	University of New Mexico		✓	Note: This s	section	adds buildings to the capital request.
Project Title	Aerospace Studies Building Renovation			This does n	not add	ouildings to the list for the institution.
				$\sum_{n=1}^{n} \sum_{i=1}^{n} \sum_{j=1}^{n} \sum_{i=1}^{n} \sum_{i$	<u>ll for ho</u>	w to add/adit/view institution data
Buildings	Building	Building Age	K	See Part VI		w to add/edit/view institution data.
	Add Building to List					
	Building	AEROSPACE STUDIES BUILDING)			
	Age of Facility (in years) 🕡		10	GSF of Facility		200,000
	Save Building Cancel					



Project Location		Project Map	Add Document	
FY Priority #	0	Master Plan Priority #	0	
Total Project Cost	\$0	State Funding Request	\$0	
Committed Match Funding	\$0	Match Funding Source		
Previous Request Summary If funding was requested in the past for this project, provide a brief summary to include when it was presented, amount of funding received and any changes from original request(s) (Cost, Scope, etc.):				
History of Facility Provide a brief history and general description of the facility:				
Current Condition What is the current condition of the facility and supporting infrastructure?				
Renovation Information What was the last major renovation completed? When was the renovation completed? What funding sources were used? A major Renovation is anything over \$500K.				
Scope of Work Provide a detailed scope of work to be completed if the project is funded. Make sure to specify any deficiencies being remedied:				



request contains multiple projects or if the project can be phased. List in priority order:	Phase #	Description			Amount	Start Date	End Date	Delete
Shorty order.	Add Phase to Pi	roject						
	Phase #				Amount	\$0		
	Start Date				End Date	•		
	Description							
	Description							
	Save Phase	Cancel						
	Save Phase	Cancel)					
Students Impacted	Save Phase	Cancel)					
Students Impacted Provide the instructional program majors being served by this project:	Save Phase Major	Cancel	Headcount	FTE	% Growth Last Year	% Growth Average	Delete	
Students Impacted Provide the instructional program majors being served by this project:	Save Phase Major Add Impact	Cancel	Headcount	FTE	% Growth Last Year	% Growth Average	Delete	
Students Impacted Provide the instructional program majors being served by this project:	Save Phase Major Add Impact Major	Cancel	Headcount	FTE	% Growth Last Year	% Growth Average	Delete	
Students Impacted Provide the instructional program majors being served by this project:	Save Phase Major Add Impact Major Headcount	Cancel	Headcount	FTE	% Growth Last Year	% Growth Average	Delete	
Students Impacted Provide the instructional program majors being served by this project:	Save Phase Major Add Impact Major Headcount Growth % Last	Year	Headcount	FTE	% Growth Last Year FTE Average Growth % (?)	% Growth Average	Delete	



Provide R bis Senerate remolineer data prepared for the Skyenes as repared on the KNHED website/GDCAR: Add Enrollment Data Yaar 2021 V FE OFTE OFTE FE OFTE OFTE FE OFTE OFTE FE OFTE	Enrollment					
per yord for hold rat geora and welds webster/eDEAH: Add Eorolinent Dats var 2021 v FE OFFE	Provide Fall Semester enrollment data					
repried on the NMAED websity-RDEAR: Add Enrollment Data Year 2021 TE 0FTE Fregets Rationale and Need: Resoure B1: Projects Promotion of Enrollment Growth, Retention, and Dagree Production B1 Score @ Not at all Nearure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score @ Not at all	per vear for the last 8 years as	Year	FTE	OFTE	Delete	
website/wDDAR: Add Enrollment Data Yer 2021 v FE Strong and Need: B Project Rationals and Need: Matare B1: Project Stromotion of trollment Growth, Retention, and Degree Production B1: Soce @ Not at all v Measure B2: Project Simpaet on Education and Workforce Needs in Local and Regional Economies B2: Soce @ Not at all v Measure B2: Project Simpaet on Education and Workforce Needs in Local and Regional Economies B2: Soce @ Not at all v	reported on the NMHED					
Add Enrollment Data Year 2021 ~ FE OFFE Sve Data Cancel B. Project Rationals and Need: Masure 81: Project Promotion of Enrollment Growth, Retention, and Dagree Production B1 Score @ Not at all ~ Not at all ~ Masure 82: Projects Impact on Educetions and Workforce Needs in Local and Regional Economies B2 Score @ Not at all ~ B2 Explanation B2 Explanation B2 Explanation	website/eDEAR:					
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B. Project Rationale and Need: Measure B1: Projects Promotion of Enrollment Growth, Retention, and Degree Production B1 Score (2) Not at all Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (2) Not at all B2 Explanation B2 Explanation B3 Explanation B4 Explanation B5 Explanation		Save Data Cancel				
B. Project Rationale and Need: Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (a) Not at all Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (a) Not at all B2 Explanation E2 Exp						
B. Project Rationale and Need: Measure B1: Projects Promotion of Enrollment Growth, Retention, and Degree Production B1 Explanation Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (i) Not at all Explanation Image:						
Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score Not at all	B Project Pationale and Need					
Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score () Not at all Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score () Not at all B2 Explanation	Measure B1: Projects Promotion of F	wellment Growth Potentian and D	area Broduction			
B1 Score (*) Not at all Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (*) Not at all Particular of the state of the sta	Measure B1. Projects Promotion of El	forment growth, Retention, and D				
B1 Explanation Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score (i) Not at all S2 Explanation	B1 Score 🕜	Not at all	\checkmark			
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Measure B2: Projects Impact on Education and Workforce Needs in Local and Regional Economies B2 Score () Not at all						
B2 Explanation	Manager D2. Designed langest and T-lang	ation and Mendefana Needs to take	and Regional Formentias			
B2 Explanation	Measure B2: Projects Impact on Educ	ation and Workforce Needs in Local	and Regional Economies			
B2 Explanation	B2 Score 🕐	Not at all	✓)			
	B2 Explanation					
						/



Provide the facility's most recent condition	non score and summarize the major stru	ictural and systems conditions that resulted in that	score. Provide selected supporting documer	itation in appendices and reference them in the body of the pl	oposai.
B4 Level of Study Completed 😢	None at all	\checkmark	Study	Add Document	
Cost to Repair 🕐		\$0	Cost to Replace	\$0	
Replacement Cost Basis (\$ per SF)		\$0	Cost to Repair AFTER Project	\$0	
B4 Explanation					
Measure B5: Projects Impact on On–C	ampus and Off-Campus Instruction				
Provide information on how this projec	t request will support both on-campus a	and off-campus instruction.			
B5 Score 🕡	Not at all	~			
B5 Explanation					

C. Green Screen for Buildings				
Measure C1: Energy Audit or Similar Er	ergy Assessment			
Document details of the audit to include	who performed the audit, when it was completed, level of	audit/assessment, improvements proposed, and benefits to this project.		
C1 Score 🕐	Not at all			
Energy Audit Completed	⊖Yes ⊖No	Energy Audit	Add Document	
C1 Explanation				
•				
Measure C2: Projects Impact on Energy	/ Utility Cost Reduction			
Explain the impact of this project to the	net energy / utility costs. Provide a justification if no operat	ting budget impact is anticipated.		
	\$,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Energy Cost AFTER Project	ćo	
	ŞU	Energy Cost AFTER Project	\$0	
C2 Explanation				
L				
Measure C3: Executive Order (EO) 2019	9-003			
Provide detailed information on how th	s project will address the goal of reducing Green House Gas	s (GHG) emissions by 45% as called for in the EO. Explain the steps taken to	reduce the buildings energy demands.	
C3 Score 🕡	Not at all			
C3 Explanation				
L				

D. Stewardship - Detail how the HEI pr Measure D1: Project Estimates Describe how this projects cost estimate	rovides stewardship for its and the stewardship for its an	ssets. the total dollars attributed t	to inflation. Percentage increases MUST	F be defended in the narrative portion of	the document, or 0% inflation will be assumed.		
01 Score 🕡	Not at all	~					
Base Project Estimate 🕡			\$0	Dollars Related to Inflation		\$0	
ormal Estimate Provided	⊖Yes ⊖No			Formal Estimate	Add Document		
91 Explanation							
Aeasure D2: Describe how this project	t addresses/reduces total de	eferred maintenance backl	og on campus. If the total campus bac	cklog is not known, what is the project r	reduction? 🔞		
acklog			\$0	AFTER Completion		\$0	
Project Deferred Maintenance			\$0	Project Deferred Maintenance AFTER Completion		\$0	
2 Explanation							
Measure D3: Asset Stewardship Provid	de information on how the H	HEI supports the ongoing o	perational and maintenance needs of	current and proposed assets.			
03 Score 🕜	Not at all	~					
evel of Plan 📀	Not at all	~		BRR Plan	Add Document		
)3 Explanation							



Measure D4: Maintenance Cost Reduce Describe in detail how this project will	:tion affect operating appropriations for the curr	ent year and all out-years. Provide a justification ij	f no operating budget impact is anticipat	ed.		
Total Annual O&M Budget		\$0	Total Annual O&M Budget AFTER Project		\$0	
D4 Explanation 🕐						
Measure D5: Health, safety, and secur Describe how this project will address	ity major health and safety issues/concerns	on campus, including how it will improve physica	l safety and cybersecurity on campus. P	rovide selected supporting documentati	on and reference them in the body of the pro	posal.
D5 Score	Not at all	 Image: A set of the set of the				
Level of Plan 🕐	Level 1	✓	HSS Plan	Add Document		
D5 Explanation						
Appropriation Lanaguage	Compose the legislative language that wo	ould best suit your project needs should the projec	t be funded (Example: to plan, design, c	onstruct, and equip infrastructure improv	ements at John Doe College)	
	L					



Follow-up Questions (Reserved for NMHED use)		
Capital Request State You should keep this capital request in		
submit it. Once it's submitted, the	Draft	
data is locked until a question is submitted by NMHED.	Draft	
Cancel Save	Submitted	
	Post Review Updates	
	Final	
2		 Set the "Capital Request State" field to "Submitted" when ready. (<u>Note</u>: The default value is "Draft". It can be changed later.) Click "Save", and the form will become the first tab of the business case (Capital Request).



Part IV – How to Review and Edit a Capital Request Form

Display Your List of Capital Requests



• <u>Option 1</u>:

- 1. Click the "Capital Requests" link in the "View" column for the desired portfolio -- OR
- **Option 2**:
 - 2. Select the desired portfolio: "Capital Funding Request Management System 2021 for FY23".
 - 3. Click the following menu item: Manage Portfolio → Manage Alternatives

(Note: Once inside the portfolio, the "Manage Alternatives" menu item will change to "Manage Capital Requests")

Select the Business Case

Portfolio: <u>Ca</u>	pita	Fund	ding R	equest Manage	ement System 20	2 <u>1 for FY23</u>			N HICI D For	IEW MEXICO HER EDUCAT EPARTMEN1 stering Student St	ION Access from Cradle to Career
Manage System	5	Man	age Por	tfolio 🗢							William Bonney (Training) 🗢
Manage Capital Req	uests										
Business Case V View Dashboard Select All				Action Default ubmit a New Capital	Request	Show: Business Case Status Vorl Return (\$) ROI (%) Run View Manage Views	kflow Status Descript IRR (%) PBP (Years)	ion Lead Sponsor	Cost 🖌 Benefit 🚺 Multi-Ye	ar 🖌 Decision	Export Capital Requests
ID		0	(()	Status	Workflow Status	Capital Request	View		Cost	Benefit	Decision
05	2		B	Pending Start		UNM - Aerospace Studies Building Renovation	Business Case	<u>(copy link)</u>			\$0 Pending
00	3	U	Î	Pending Start		UNM - Technology Infrastructure Upgrades	Business Case	<u>(copy link)</u>			\$0 Pending
00	2	U	ŝ	Pending Start		UNM - Lab Safety Improvements	Business Case	(copy link)			\$0 Pending

- 1. Click the "Business Case" link in the "View" column that is associated with the desired capital request, OR
- 2. Click the business case icon

Part IV – How to Review and Edit a Capital Request Form

Edit the Capital Request Form

Portfolio: <u>Capital Fund</u>	ing Request Management Syste	em 2021 for FY23		NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢 🛛 Manag	ge Portfolio 🗢			William Bonney (Training) 🗢
Capital Request Entry				
Before completing the project even Instruction Guide Institution Project Title	University of New Mexico Aerospace Studies Building Renovation	ED Instruction manual for Annual Capital Outlay Funding Request	 The manual provides specific guidance on what should Updates can be made (see the next slide) Scroll down to see the 	until the form has been submitted remainder of the form.
Buildings	Building	Building Age	Building GSF	Delete
	Add Building to List Building Age of Facility (in years)? Save Building Cancel	AEROSPACE STUDIES BUILDING	GSF of Facility	200,000





Follow-up Questions (Reserved for NMHED use)			
Conside Restricted			
You should keep this capital request in			
draft status until you are ready to submitted the	Draft 🗸		
data is locked until a question is			
submitted by NMHED.	Draft		
Cancel Save	Submitted	——(<u>1</u>)	
	Post Review Updates		
	Final		
		1 Set the "Canital Request State" field to "Submitted" when ready	
		1. Set the Capital Request State field to Submitted when ready.	
		(<u>Note</u> : The default value is " Draft ". It can be changed later.)	
		2 Click "Save"	



Part V – How to Upload Additional Capital Request Documents

Select the Business Case

Portfolio:	Capit	al Fun	ding R	equest Manag	ement System 20	2 <u>1 for FY23</u>			HIG L Fo	NEW MEXICO HER EDUCATI DEPARTMENT pstering Student Su	ON Location Cradle to Career
Manage Syste	em 🛡	Man	age Por	ttolio 🛡							William Bonney (Training) 🛡
Manage Capital I	Request	ts									
	2			Action	~	Show: Return (\$) ROI (%)	rkflow Status Descript	tion Lead Sponsor	Cost 🖌 Benefit 🗌 Multi-Ye	ar 🖌 Decision	
Business Case V				Default		Run View Manage Views					
View Dashbo	oard		5	ubmit a New Capita	l Request						Export Capital Requests
Select All											
	ID	U		Status	Workflow Status	Capital Request	View		Cost	Benefit	Decision
	052		ŝ	Pending Start		UNM - Aerospace Studies Building Renovation	Business Case	<u>(copy link)</u>		1	\$0 Pending
	003	Ú	B	Pending Start		UNM - Technology Infrastructure Upgrades	Business Case	<u>(copy link)</u>		7	\$0 Pending
	002	U	(3)	Pending Start		UNM - Lab Safety Improvements	Business Case	<u>(copy link)</u>	. , . ,	1	\$0 Pending

- 1. Click the "Business Case" link in the "View" column that is associated with the desired capital request, OR
- 2. Click the business case icon

Click the "Documents" Tab

Portfolio: <u>Capital Fu</u>	nding Request I	Management System 2	021 for FY23					NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to	o Career
Manage System 🗢 🛛 Ma	anage Portfolio 🗢							William Bonney (1	īraining) 🗢
Financial Business Case <u>Capital Request 003: Technology</u>	Infrastructure Upgrad	les	2			V		Show Guidance	Run Report
Capital Request	Solution Approach	Resource Dependenci	es Forecast		Results	Documents		Lookback	
Add Document	Document Type				Upload		3)	
Document	Document T	/pe User		Date	Delete				
02 _Project_Evaluation_For	Evaluation Fo m_UN	orm Gerald	loehne	06/11/21	Delete				
Technology Infra Upgrad	es - Full Study	Gerald	loehne	06/11/21	Delete		1.	Click the " Documents " tab in the busines case for the associated capital request.	5
							2.	Enter the " Document Type ".	
Institution or Building	Year	Document	Document Type	User		Date	2	Click the "Upload " button	
University of New Mexico	2019	2019-IG-UNM.XLS	Space Verification	Gerald	Hoehne	6/6/2021	J. ∕	Browso to file and click "Onen" (not show	(n)
University of New Mexico	2021	05 _Status_of_all_Active_Pro	Active Project Status Dje	Gerald	l Hoehne	6/11/2021	4.	Browse to me and click Open (not show	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,



Capital Request Demonstration



Part VI – How to Add/Delete/View Institution Documents

Go to "Manage System → Manage Institution Data"

	Manage System 🗢 Manage Institution Data	< <u>1</u>		NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢	Manage Portfolios			William Bonney (Training) 🗢
	Manage Views			
Entity Type	Institution	~)		
Туре	Documents	\bigcirc	Name	BRR GSF per Parsons 2006
Institution	(8) Documents	(2)	University of New Mexico	5,146,904
		\sim		

- 1. Click the "Manage System → Manage Institution Data" menu item.
- 2. Click the "(#) Documents" link to view the list of documents, add a document, or delete a document.

Add/Delete/View Institution Documents





Part VII – How to Add/Edit/View Institution Data

Go to "Manage System → Manage Institution Data"

	Manage System 오 Manage Institution Data				NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢	Manage Portfolios				William Bonney (Training) 🗢
	Manage Views				
Entity Type	Institution	2			
Туре	Documents		Name	\frown	BRR GSF per Parsons 2006
Institution	(8) Documents		University of New Mexico	- 3	5,146,904

- 1. Click the **"Manage System → Manage Institution Data**" menu item.
- 2. Select the "Entity Type". The default selection is "Institution". (<u>Note</u>: The other option is "Building".)
- 3. Click the institution name link to view the data.

Add/Edit/View Institution Data

		2016 2017 2018	•		NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢		2019 2020			William Bonney (Training) 🗢
Entity Type Institution	University of New I	Ve 2022	~	2	
Type Documents Institution Documents	Year BRR GSF per Parsons 2006	General Data 5,146,904			r Parsons 2006
	Save	otal SE of Institution	Enrollment Headcount	ETE	1. Select the year.
	2021	6,056,453	19,430	16,556	
	2020	6,034,289	22,030	18,119	
	2019	6,027,289	22,602	18,832	
	2018	6,019,752	24,188	19,246	
	2017	6,019,752	26,140	20,924	
	2016	5,957,025	26,998	23,016	
		0,100,211	21,702		-



Add/Edit/View Institution Data (cont.)

						NEW MEXICO HIGHER EDUCATION DEPARTMENT Fostering Student Success from Cradle to Career
Manage System 🗢	Manage Portfolio 🛇					William Bonney (Training) 🗢
		University of Nev	v Mexico Data			×
Entity Type	Institution	Year	2022	•		
Туре	Documents	Total SF of Institution	0			r Parsons 2006
Institution	Documents	Enrollment Headcount	0			1 Enter the data
		Save				2. Click "Save".
		Year	Total SF of Institution	Enrollment Headcount	FTE	
		2021	6,056,453	19,430	16,556	
		2020	6,034,289	22,030	18,119	
		2019	6,027,289	22,602	18,832	
		2018	6,019,752	24,188	19,246	
		2017	6,019,752	26,140	20,924	
		2016	5,957,025	26,998	23,016	•





Institution Data Demonstration



Part VIII – How to Request Help

How to Request Help



Atton.	Manage S anage Cap	ystem 오 ital Reques	Ma ts	nage Po	ortfolio O					William Bonney (Training) 오	Your
et All It II II II II II II II II II III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	siness Cas View D	views shboard			Action Default Submit a New Capital Request	Show: Business Case Status	Workflow Status Descri	iption Lead Sponsor s) Discounting Limited	✓ Cost ✓ Benefit Multi-Y d Access	Export Capital Requests	Ema
052 Image: Construction of the Pending Start UNM - Arrospace Studies Building Renovation Business Case (cocy.link) 50 60 Pending 003 Image: Construction of the Pending Start UNM - Technology Infrastructure Upgrades Business Case (cocy.link) 50 Pending 001 Image: Construction of the Pending Start UNM - Lab Safety Improvements Business Case (cocy.link) 50 Pending 001 Image: Construction of the Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (cocy.link) 50 Pending 001 Image: Construction of the Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (cocy.link) 50 Pending 001 Image: Construction of the Start UNM - Main Campus, Albuquerque, New Mexico Business Case (cocy.link) 50 Pending S0 Pending <	ct All	ID	ŋ	(8)	Status Workflow	Status Capital Request	View		Cost	Benefit Decision	
003 0 0 Pending Start UNM - Technology Infrastructure Upgrades Business Case (copy, link) 50 Pending 001 0 0 0 0 Pending Start UNM - Alab Safety Improvements Business Case (copy, link) 50 Pending 001 0 0 0 0 0 Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (copy, link) 50 Pending 001 0 0 0 0 Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (copy, link) 50 Pending 0 0 0 0 0 0 Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (copy, link) 50 Pending 0 0 0 0 0 0 Pending Start UNM - Start USDE-2021 Definitive Business Solutions, Inc. All Rights Reserved. US. Peternt Nos. 10.268,977; 10.966,361; 10.417,590	כ	052	9		Pending Start	UNM - Aerospace Studies Building Renovation	Business Case	(copy link)	\$0	\$0 Pending	
002 0 0 Pending Start UNM - Lab Safety Improvements Business Case (ceev. link) S0 Pending 01 0 0 0 0 0 Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (ceev. link) S0 Pending Contraction (Contraction]	003	Ú	(B)	Pending Start	UNM - Technology Infrastructure Upgrades	Business Case	(copy link)	11,000,000	\$0 Pending	
001 Pending Start UNM - Main Campus, Albuquerque, New Mexico Business Case (coox link) S0 Pending Coox link) S0 Pending S0 Pending]	002	Ú	(B)	Pending Start	UNM - Lab Safety Improvements	Business Case	(copy link)	10,000,000	\$0 Pending	How
©2016-2021 Definitive Business Solutions, Inc. All Rights Reserved. U.S. Patent Nos. 10,268,977; 10,366,361; 10,417,590]	001	Ø	ß	Pending Start	UNM - Main Campus, Albuquerque, New Mexic	• Business Case	(copy link)	101,000,000	\$0 Pending	
						©2016-2021 Definitive	Business Solutions, Inc. All Ri	ights Reserved.		(2) Неір	Atta



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Part IX – Actions

Actions



- Review your capital requests by close of business Monday July 12th, 2021.
 - Perform a general QA check of your form(s) and data
 - Select a rating for each of the 13 scoring fields
 - Change the "Capital Request State" field to "Submitted"
- Review and update your institution data and building data, as needed



Part X – Login and Review Forms and Data

How to Login

- 1. Access via a web browser: <u>https://www.DefinitivePro.com/NM.aspx</u>
- 2. Enter your email address and click "Next".



3. Enter your password and click "Login".



4. Receive your 4-digit PIN via your email account.

(Later, you can enter your smartphone number in your profile for future use.)

5. Enter your 4-digit PIN and click "Submit".





smartphone



User Accounts (Sorted by Last Name, First Name)

First Name	Last Name	Institution	Email	First Name	Last Name		Institution
Renee	Allen	SIPI	Renee.Allen@bie.edu	Tony	Major	ENMU - Portal	es, Roswell & Ruidoso
Mark	Apodaca	NM School for the Deaf	mark.apodaca@nmsd.k12.nm.us	Lisa	Marbury	University of Ne	w Mexico
Jason	Arviso	NTU	jarviso@navajotech.edu	Loretta	Marquez	All	
Kiri	Baca	NMSU	kiwibaca@nmsu.edu	Marvin	Martinez	CNM	
Max	Baca	New Mexico Highlands University	mbaca@nmhu.edu	Karen	Massey	ENMU-Ruidoso	
Sylvia	Baca	New Mexico Highlands University	sbaca@nmhu.edu	Kevin	Matthes	Western New Mexic	o University
Rochelle	Bahe	Dine College	rochlbahe@dinecollege.edu	Henry	Mignardot	SFCC	· · · · · · · · · · · · · · · · · · ·
Michelle	Bailey	University of New Mexico	mbailey0825@unm.edu	Steve	Miller	San Juan College	
Natalie	Bass	NMJC	nbass@nmjc.edu	Larry	Mirabal	IAIA	
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Dr. Gregory	Busch	Mesalands Community College	President@mesalands.edu	Jim	Morgan	Mesalands Community C	ollege
Luis	Campos	NMSU	campos1@nmsu.edu	Josh	Morgan	NMJC	
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Maria	Dion	University of New Mexico	mdion@unm.edu	Delbert	Paquin	Dine College	
Rosie	Dudley	University of New Mexico	rdudley1@unm.edu	Amy	Pell	Santa Fe Community Colleg	ge
Kyle	Duran	University of New Mexico - Health Sciences Center	kwduran@salud.unm.edu	Shelley	Pickett	San Juan College	
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Robert	Herrera	New Mexico State University	<u>rh@nmsu.edu</u>	Dr. Hazel	Rountree	Mesalands Community Coll	ege
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Olga	Holguin	New Mexico State University	olgahol1@nmsu.edu	Dobby	Schmidt	Santa Fe Community College	9
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Laurie	Logan Brayshaw	Institute of American Indian Arts	<u>llogan@iaia.edu</u>	Yvonne	Tellez	SFCC	
Heather	Lovato	ССС	heather.lovato@clovis.edu	Ryan	Trosper	ENMU-Ruidoso	
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Shawn	Madrid	NNMC	shawn.madrid@nnmc.edu	Heather	Watenpaugh	New Mexico State University	
				David	West	NMMI	



Thank you for participating in CFRMS User Training!



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