ABC 2015 Fall Summit

Facilities
Service Requests and Project Portlet

September 9th & 10th, 2015

Overview

- Service Request
  - Maintenance vs Recharge
  - Projects
  - Specialized Forms
  - How to Enter via the Portal
Overview

- **Project Portlet**
  - Set-up
  - Using

Ways to Enter a Service Request

- My Cal Poly Portal
- 756-5555 (Emergency/Maintenance)
- facilities-cbs@calpoly.edu
- Fax: 756-6114
- Inter-Campus Mail or Walk-In
  - Building 70 Room 100
Submitting a Service Request

- **Maintenance**
  - Is the item part of the building?

- **Chargeback**
  - Was the item added by a department?
  - If I’m a new occupant do I own it?

**Submit a Request**

Give us a call or use the Portal

- Reset a tripped breaker
- Too hot or too cold
- Broken restroom fixture
- Lights out: ceiling, streets, or exteriors
- Pest control
- Custodial

https://afd.calpoly.edu/facilities/maintenance_defs.asp
Recharge

**We need your Chartfield string in writing**

- Install / move an electrical outlet or light switch
- Install a keyboard tray
- Hang pictures / bulletin boards
- Attach a bookcase / file cabinet to the wall

https://afd.calpoly.edu/facilities/maintenance defs.asp

Projects

**More than one Trade/Shop**

- Convert a storage room to office space
- Minor install of new lab equipment

**Outside Contract**

- Install security alarms linked to UPD
- Carpets

https://afd.calpoly.edu/facilities/maintenance defs.asp
Specialized Forms

- **Forms (non-portal)**
  - Nameplates / Name Tags
  - Moving
  - Surplus Pickup
  - Supply Rentals
  - Permits

*Instructions for submittal are on the forms*  
(https://afd.calpoly.edu/facilities/services_buildingpermits.asp)

Specialized Forms

- **Forms (non-portal)**
  - Permits
    - Office Furniture

https://afd.calpoly.edu/facilities/services_buildingpermits.asp
My Cal Poly Portal

Facilities Requests for on-campus or VPN Users

It's ITS - not Facilities
Choose from the available forms.
No work order will be generated for these items.
My Cal Poly Portal

Use the "Facilities Requests" tab to request basic maintenance, repairs, or facility modifications or upgrades.

Use the "Other Request Forms" tab to access a building permit, supply rental, moving, surplus, nameplate, or vehicle service request form.

For Custodial, Landscaping, or customer services contact the Facilities Help Center at facilities-help@calpoly.edu or 756-5555.

afd.calpoly.edu/facilities

My Cal Poly Portal

Searches

afd.calpoly.edu/facilities
Select Facility Type (for service location):

- NON-STATE FACILITY (ASL CORPORATION & FOUNDATION)
- STATE FACILITY (ALL OTHER CAMPUS DEPARTMENTS)

Explanation of Request Types

- Minor Requests: These consist of one or two employee requests and are generally smaller jobs that can be completed by a single trade, such as Painters or Carpenters, with the possibility of some support from others. Facilities is not funded for this type of work and, therefore, must charge for these services. A valid purchase order must be included along with the request and the requestor must have the authority to expend campus funds.

- Project Requests: These consist of larger jobs, such as facility modifications, including change of use, renovations, or interior upgrades. They are generally completed by multiple trades, and the possibility that one or more outside contractors may be involved. Facilities is not funded for these projects or project work and must charge for these services, which are often completed in overtime due to staffing constraints. A valid purchase order must be submitted along with the request as high level approval must be obtained prior to the commencement of work. Facilities, Customer & Business Services will assist the requestor with the approval process.
Basic Request - Types

STATE FACILITY (ALL OTHER CAMPUS DEPARTMENTS)

Explanation of Request Types
- BASIC MAINTENANCE OR REPAIRS (NO CHARGE)
- MINOR REQUESTS
- MINOR REQUESTS WITH ESTIMATE
- PROJECT REQUESTS

Basic Request - Description

Work Description
*Brief Description of Work: key sticks in lock
*Detailed Description of Work:

the key is hard to turn and often sticks

Please include primary contact information, if other than yourself.
Basic Request - Building

Select Site - Building (Building Description)

<table>
<thead>
<tr>
<th>Site</th>
<th>Building</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLO</td>
<td>001</td>
<td>ADMINISTRATION</td>
</tr>
<tr>
<td>SLO</td>
<td>002</td>
<td>GUTCHELT EDUCATION BUILDING</td>
</tr>
<tr>
<td>SLO</td>
<td>002W</td>
<td>EDUCATION BLDG</td>
</tr>
<tr>
<td>SLO</td>
<td>003</td>
<td>BUSINESS</td>
</tr>
<tr>
<td>SLO</td>
<td>004</td>
<td>RESEARCH DEVELOPMENT</td>
</tr>
<tr>
<td>SLO</td>
<td>004A</td>
<td>AERIAL HANGAR</td>
</tr>
<tr>
<td>SLO</td>
<td>004B</td>
<td>PUBLIC SAFETY STASH BLOCKHOUSE</td>
</tr>
<tr>
<td>SLO</td>
<td>004C</td>
<td>PUBLIC SAFETY LAB</td>
</tr>
<tr>
<td>SLO</td>
<td>004D</td>
<td>ROCKET TEST FACILITY</td>
</tr>
<tr>
<td>SLO</td>
<td>004N</td>
<td>BIOLOGICAL SAFETY</td>
</tr>
<tr>
<td>SLO</td>
<td>005</td>
<td>ENVIRONMENTAL POOL</td>
</tr>
<tr>
<td>SLO</td>
<td>005A</td>
<td>AERO TOWER</td>
</tr>
<tr>
<td>SLO</td>
<td>005B-P001</td>
<td>AERO STRG</td>
</tr>
<tr>
<td>SLO</td>
<td>005U-P001</td>
<td>PUBLIC SAFETY STASH</td>
</tr>
<tr>
<td>SLO</td>
<td>006</td>
<td>AERIAL PORTABLE (P101)</td>
</tr>
<tr>
<td>SLO</td>
<td>007</td>
<td>ARCH &amp; ENGR DESIGN</td>
</tr>
<tr>
<td>SLO</td>
<td>007A</td>
<td>PERFORMING ARTS CENTER</td>
</tr>
<tr>
<td>SLO</td>
<td>007A</td>
<td>ADVANCED TECHNOLOGY LAB</td>
</tr>
</tbody>
</table>

afd.calpoly.edu/facilities

Basic Request - Floor

Create Service Request: Enter Location - Step 4 of 5

Select Site - Building (Building Description)

<table>
<thead>
<tr>
<th>Site</th>
<th>Building</th>
<th>Floor</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLO</td>
<td>186</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Floor</td>
<td>Room</td>
</tr>
</tbody>
</table>

Select Floor (Description)

<table>
<thead>
<tr>
<th>Floor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>GROUND FLOOR/BASEMENT</td>
</tr>
<tr>
<td>1</td>
<td>FIRST FLOOR</td>
</tr>
<tr>
<td>2</td>
<td>SECOND FLOOR</td>
</tr>
<tr>
<td>3</td>
<td>THIRD FLOOR</td>
</tr>
</tbody>
</table>

afd.calpoly.edu/facilities
Basic Request - Room

Create Service Request: Enter Location - Step 4 of 5

- Site
  - Building: 186
  - Floor: 1
  - Room: A106

Select the Building, Floor, and Room by clicking the button to the left of each field. Only rooms associated with the building and floor you selected will be available.
Basic Request - Finished

Create Service Request: Review - Step 5 of 5

Requestor Information
Requestor Name: MACDONALD, WENDY L., Requestor Phone: 805/756-5555
Requestor Dept: 311, Requestor Email: WMACDONALD@CALPOLY.EDU

Service Description
Work Title: KEY STICKS IN LOCK
Description: the key is hard to turn and often sticks

Location
Site: SLO, Building: 186
Floor: 1, Room: A106

Cancel  Finish

Basic Request – SR#

Thank you for your request. [SR#] has been submitted to Facilities Customer & Business Services on 04/04/2015. You will be notified when it has been processed or contacted for further authorization, if needed.

Please note this request number or save a copy of this page for your records.

If you have questions, contact Facilities Customer & Business Services at facilities.cbs@calpoly.edu or 756-5555.

Requestor Information
Requestor Name: MACDONALD, WENDY L., Requestor Phone: 805/756-5555
Requestor Dept: 311, Requestor Email: WMACDONALD@CALPOLY.EDU

Service Description
Work Title: KEY STICKS IN LOCK
Description: the key is hard to turn and often sticks

Location
Site: SLO, Building: 186
Floor: 1, Room: A106

Go Back to Service Requests
Minor Request will go straight to the Trades. Estimates require an extra 2 weeks minimum.

I've placed sticky notes where I want the pictures hung. My office is in use from 2 to 4 pm M-F, please come any other time. Thanks.
If noted in description – building and room number can be left blank.
Minor Requests – SR# 

Thank you for your request, (SR#1234567) has been submitted to Facilities Customer & Business Services on 09/01/2015. You will be notified when it has been processed or contained for further action/authorization, if needed.

Please note this request number or save a copy of this page for your records.

If you have questions, contact Facilities Customer & Business Services at facilities-clc@calpoly.edu or 765-6555.

Requester Information
Requestor Name: R. Donald J. McDonald
Requestor Dept: 316
Requestor Phone: 0957545555
Requestor Email: R.MCDONALD@CALPOLY.EDU

Service Description
Account Name: 503.35-112434-145678
Work Site: MOUNT PICTURES ON WEST WALL. BUILDING 16 ROOM 147
Description: I've placed story notes where I want the pictures hang. My office is in use from 2 to 4 pm M-F, please come any other time.

Thanks

Location
Site: SLU
Building: 16
Floor: 1
Room: 147

Questions
Facilities Service Requests and Project Portlet

Wendy Macdonald
wmacdona@calpoly.edu
756-7556

Facilities Help Center
facilities-cbs@calpoly.edu
756-5555