ABC 2015 Fall Summit

Facilities
Service Requests and Project Portlet

September 9th & 10th, 2015

afd.calpoly.edu/facilities
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?
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
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/maintenanceDefs.asp
Specialized Forms

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

*Instructions for submittal are on the forms*
Specialized Forms

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

https://afd.calpoly.edu/facilities/services_buildingpermits.asp
Facilities Requests for on-campus or VPN Users

afd.calpoly.edu/facilities
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-cbs@calpoly.edu or 756-5555.
Choose from the available forms.
No work order will be generated for these items.
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-cbs@calpoly.edu or 756-5555.

Site
SLO  CAL POLY SAN LUIS OBISPO
Service Requests
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My Cal Poly Portal

Searches

<table>
<thead>
<tr>
<th>Request Number</th>
<th>Phase</th>
<th>Work Order</th>
<th>Request Details</th>
<th>Requestor</th>
<th>Maint Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Search**

- Create Service Request

- **Search**

  - My requests this week
  - My requests last week
  - My requests this month
  - My requests last month
  - All my requests

- **Go**

[afd.calpoly.edu/facilities](http://afd.calpoly.edu/facilities)
Create Service Request: Confirm Requestor - Step 1 of 5

Requestor

MACDONALD, WENDY, L.
Phone 805/756-5555
E-mail WMACDONA@CALPOLY.EDU
Department 311

Cancel Next
Create Service Request: Select Service - Step 2 of 5

Available Services

- CLICK HERE TO PROCEED
Create Service Request: Select Service - Step 2 of 5

Select Facility Type (for service location):

- NON-STATE FACILITY (ASI, CORPORATION, & FOUNDATION)
- STATE FACILITY (ALL OTHER CAMPUS DEPARTMENTS)
Facilities Request Types

Basic Maintenance and Repairs: Facilities is funded to maintain state buildings, landscaping, and the campus wide road and utility infrastructure in support of the university's academic mission. Therefore, we do not charge for maintenance services at state facilities. Our department is not funded to maintain non-state facilities, such as those leased by ASI, Corporation, and Foundation and must charge these groups for our services. We are not permitted to expend tax-payer funds in support of non-state entities.

Minor Requests: These consist of non-maintenance requests and are generally smaller jobs predominately completed by a single trade, such as Painters or Carpenters, with the possibility of minor support from others. Facilities is not funded for this type of work and, therefore, must charge for these services. A valid chartfield string must be submitted along with the request and the requestor must have authority to expend campus funds.

Project Requests: These consist of larger jobs, such as facility modifications, including change of use, renovations, or system upgrades. They are generally completed by multiple trade shops with the possibility that one or more outside contractor may be involved. Facilities is not funded for non-maintenance project work and must charge for these services, which are often completed on overtime, due to staffing constraints. A valid chartfield string must be submitted along with the request and high level approval must be obtained prior to the commencement of work. Facilities Customer & Business Services will assist the requestor with the approval process.
STATE FACILITY (ALL OTHER CAMPUS DEPARTMENTS)

Explanation of Request Types

- BASIC MAINTENANCE OR REPAIRS (NO CHARGE)
- MINOR REQUESTS
- MINOR REQUESTS WITH ESTIMATE
- PROJECT REQUESTS
the key is hard to turn and often sticks

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

<table>
<thead>
<tr>
<th>Site</th>
<th>Building</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLO 001</td>
<td>ADMINISTRATION</td>
<td></td>
</tr>
<tr>
<td>SLO 002</td>
<td>COTCHETT EDUCATION BUILDING</td>
<td></td>
</tr>
<tr>
<td>SLO 002W</td>
<td>EDUCATION RENO (22%)</td>
<td></td>
</tr>
<tr>
<td>SLO 003</td>
<td>BUSINESS</td>
<td></td>
</tr>
<tr>
<td>SLO 004</td>
<td>RESEARCH DEVELOPMENT</td>
<td></td>
</tr>
<tr>
<td>SLO 004A</td>
<td>AERO HANGAR</td>
<td></td>
</tr>
<tr>
<td>SLO 004B</td>
<td>PUBLIC SAFETY STRG BLOCKHOUSE</td>
<td></td>
</tr>
<tr>
<td>SLO 004C</td>
<td>PUBLIC SAFETY LAB</td>
<td></td>
</tr>
<tr>
<td>SLO 004D</td>
<td>ROCKET TEST FACILITY</td>
<td></td>
</tr>
<tr>
<td>SLO 004E</td>
<td>RADIATION SAFETY</td>
<td></td>
</tr>
<tr>
<td>SLO 004N</td>
<td>ENVIRONMENTAL POOLS</td>
<td></td>
</tr>
<tr>
<td>SLO 004Q</td>
<td>AERO TOWER</td>
<td></td>
</tr>
<tr>
<td>SLO 004R</td>
<td>AERO STRG</td>
<td></td>
</tr>
<tr>
<td>SLO 004S-P003</td>
<td>PUBLIC SAFETY STRG</td>
<td></td>
</tr>
<tr>
<td>SLO 004U-P001</td>
<td>AERO PORTABLE (P001)</td>
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</tr>
<tr>
<td>SLO 005</td>
<td>ARCH &amp; ENVIR DESIGN</td>
<td></td>
</tr>
<tr>
<td>SLO 006</td>
<td>PERFORMING ARTS CENTER</td>
<td></td>
</tr>
<tr>
<td>SLO 007</td>
<td>ADVANCED TECHNOLOGY LAB</td>
<td></td>
</tr>
<tr>
<td>SLO 007A</td>
<td>ADVANCE TECHNOLOGY LAB SEISMIC LAB</td>
<td></td>
</tr>
</tbody>
</table>

[afd.calpoly.edu/facilities](http://afd.calpoly.edu/facilities)
Select the Building, Floor, and Room by clicking the buttons. You must select at least a Building and a Floor. The rooms associated with the selected floor will be available.

Select Floor (Description):

<table>
<thead>
<tr>
<th>Floor</th>
<th>Description</th>
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</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>
<tr>
<td>Location</td>
<td>Service</td>
</tr>
<tr>
<td>----------</td>
<td>------------------</td>
</tr>
<tr>
<td>A109</td>
<td>RESTROOM</td>
</tr>
<tr>
<td>A110</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>A112</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B100</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B101</td>
<td>RESTROOM</td>
</tr>
<tr>
<td>B102</td>
<td>RESTROOM</td>
</tr>
<tr>
<td>B103</td>
<td>ASSIGN</td>
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<td>B104</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B105</td>
<td>ASSIGN</td>
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<tr>
<td>B106</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B107</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B108</td>
<td>RESTROOM-WOMEN</td>
</tr>
<tr>
<td>B108A</td>
<td>CUSTODIAL CLOSET</td>
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<tr>
<td>B109</td>
<td>MECELECT</td>
</tr>
<tr>
<td>B110</td>
<td>RESTROOM-MEN</td>
</tr>
<tr>
<td>B111</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>C100</td>
<td>MECELECT</td>
</tr>
<tr>
<td>C101</td>
<td>ASSIGN</td>
</tr>
</tbody>
</table>
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
Floor: 1
Building: 186
Room: A106

[Finish]
Basic Request – SR#

Thank you for your request. (SR0229410) has been submitted to Facilities Customer & Business Services on 09/04/2015. 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
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 - Finished
Thank you for your request. (SR0229411) has been submitted to Facilities Customer & Business Services on 09/04/2015. 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 Dept: 311
- Requestor Phone: 805/756-5555
- Requestor Email: WMACDONA@CALPOLY.EDU

**Service Description**

- Account Segments: SL001-100400-617001—CU004 - (100%)
- Work Title: MOUNT PICTURES ON WEST WALL - BUILDING 10 ROOM 147
- Description: 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

**Location**

- Site: SLO
- Building
- Floor
- Room

[Go Back to Service Requests]
Questions
Facilities Service Requests and Project Portlet

Wendy Macdonald
wmacdona@calpoly.edu
756-7556

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