ABC 2016 Fall Summit

Facilities Service Requests via My Cal Poly Portal

September 7th & 8th, 2016

afd.calpoly.edu/facilities
Agenda

- Ways to Enter a Service Request
- Maintenance vs Chargeback
- What is a Project?
- Entering a Service Request via the My Cal Poly Portal
  - Special Forms
  - Searches
- Setting up the Project Portlet
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
Submit a Service Request

- Maintenance when
  - the item is part of the building

- Chargeback when
  - the item was added by a department
  - the item was added by a previous department
📞 **Give us a call**
or use the Portal 🛠️

- 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 a keyboard tray
- Hang pictures / bulletin boards
- Attach a bookcase / file cabinet to the wall
- Moving or Surplus

https://afd.calpoly.edu/facilities/maintenance_defs.asp
What is a Project?

- 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
MY CAL POLY PORTAL

afd.calpoly.edu/facilities
Click on Facilities Requests

afd.calpoly.edu/facilities
it’s ITS - not Facilities
When you can’t use the portal for requests: Other Request Forms

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.
Specialized Forms

- Forms (don’t use the 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)
See our website for:

- Permits
- Office Furniture

https://afd.calpoly.edu/facilities/services_buildingpermits.asp
Choose from the available forms.
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-cbs@calpoly.edu or 756-5555.

No work order will be generated for these items.

afd.calpoly.edu/facilities
When you should use the portal for requests

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

<table>
<thead>
<tr>
<th>SLO</th>
<th>CAL POLY SAN LUIS OBISPO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Requests</td>
<td></td>
</tr>
</tbody>
</table>

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.

Site

SLO CAL POLY SAN LUIS OBISPO

Service Requests
If you know the SR# you can get a cost summary by clicking on Request Details.
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

Cancel Back
Select Facility Type (for service location):

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

- Basic Maintenance Operations
- Minor Requests
- Minor Requests with
- Project Requests

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 expand 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.
Create Service Request: Select Service - Step 2 of 5

Confirm Requestor Select Service Enter Service Details Enter Location Review

STATE FACILITY (ALL OTHER CAMPUS DEPARTMENTS)

Explanation of Request Types

- BASIC MAINTENANCE OR REPAIRS (NO CHARGE)
- MINOR REQUESTS
- MINOR REQUESTS WITH ESTIMATE
- PROJECT REQUESTS

Cancel  Back

afd.calpoly.edu/facilities
the key is hard to turn and often sticks

Please include primary contact information, if other than yourself.
<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>
<td></td>
</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>
Select the Building, Floor, and Room by clicking the button for each field. Only rooms associated with the selected will be available.
### Create Service Request: Enter Location - Step 4 of 5

- **Site**: SLO
- **Building**: 186
- **Floor**: 1

<table>
<thead>
<tr>
<th>Building</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<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>RESTROOM</td>
</tr>
<tr>
<td>B101</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B102</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B103</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B104</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B105</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B106</td>
<td>ASSIGNED-WOMEN</td>
</tr>
<tr>
<td>B107</td>
<td>CUSTODIAL CLOSET</td>
</tr>
<tr>
<td>B108</td>
<td>MECHENCT</td>
</tr>
<tr>
<td>B108A</td>
<td>RESTROOM-MEN</td>
</tr>
<tr>
<td>B109</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>B110</td>
<td>MECHENCT</td>
</tr>
<tr>
<td>B111</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>C100</td>
<td>ASSIGN</td>
</tr>
<tr>
<td>C101</td>
<td>ASSIGN</td>
</tr>
</tbody>
</table>

[afd.calpoly.edu/facilities](afd.calpoly.edu/facilities)
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.
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: WMACDONA@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
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

<table>
<thead>
<tr>
<th>Requestor Name</th>
<th>MACDONALD, WENDY, L.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor Phone</td>
<td>805/756-5555</td>
</tr>
<tr>
<td>Requestor Dept</td>
<td>311</td>
</tr>
<tr>
<td>Requestor Email</td>
<td><a href="mailto:WMACDONA@CALPOLY.EDU">WMACDONA@CALPOLY.EDU</a></td>
</tr>
</tbody>
</table>

### Service Description

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

### Location

<table>
<thead>
<tr>
<th>Site</th>
<th>SLO</th>
<th>Building</th>
<th>186</th>
</tr>
</thead>
<tbody>
<tr>
<td>Floor</td>
<td>1</td>
<td>Room</td>
<td>A106</td>
</tr>
</tbody>
</table>
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

Please include primary contact information if other than yourself.
If noted in description – building and room number can be left blank.
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  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

Finish
Thank you for your request. (SR0229411) has been submitted to Facilities Customer & Business Service Center. 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 future reference.

If you have questions, contact Facilities Customer & Business Service Center at 805-756-4700 or facilities@calpoly.edu

Requestor Information
Requestor Name: MACDONALD, WENDY, L.
Requestor Dept: 311

Service Description
Account Segments: SL001-100400-617001—CU004
Work Title: MOUNT PICTURES ON WEST WALL
Description: I’ve placed sticky notes where I would like the pictures mounted.
My office is in use from 2 to 4 p.m. please call at other times.
Thanks

Location
Site: SLO
Building
Floor
Room

Go Back to Service Requests

afd.calpoly.edu/facilities 35
Questions
Facilities Project Portlet

My Cal Poly Portal

my.calpoly.edu
Purpose of the Portal

- Project Manager Contact Information
- Easy Access
- Dynamic Information
Setting Up Your Project Portlet

STEP 1

Add a tab for Facilities by clicking the "Add Tab" button.

Training Resources

http://afd.calpoly.edu/facilities
Setting Up Your Project Portlet

STEP 2

The default title of a new tab is "My Tab". Click into the field to change the title.
STEP 3

**Change the title of your new tab to "Facilities Projects", "Facilities" or another title of your choice.**
STEP 4

Now you're ready to add the portlet, click the "Customize" button on the far right side of your portal window. This will open up the customization options. Click into the search field to find the Facilities Project portlet.

Click the CUSTOMIZE handle to get started.
Setting Up Your Project Portlet

STEP 5

Searching for 'facilities' will bring up the "Facilities Projects" portlet, click on link to add the portlet to your Facilities tab.

afs.calpoly.edu/facilities
STEP 6

Once the portlet is added, click the “Customize” button again to change the layout.
Setting Up Your Project Portlet

My Cal Poly Portal

Check the box for the "1 Column, Full-width" layout.

1 Column

Facilities Projects

If you have questions about a project, please contact the Facilities Help Center at 756-5555 or facilities-cbs@calpoly.edu

Search Projects:
Show/Hide Advanced Search
Project Number Ends With: 

Search

No Projects
Results are based on username (jhunter@calpoly.edu)

afd.calpoly.edu/facilities
Setting Up Your Project Portlet

STEP 8

My Cal Poly Portal

Once you’ve selected the "Full-width" view, click "I'm Done" to close the customize screen.

Now you’re ready to begin using the portlet!

afd.calpoly.edu/facilities
Using The Project Portlet

STEP 9

Search Projects:
Project Number Ends With 129

Projects you are the requestor on will show up automatically in your list.

If you are NOT the requestor you may search by project number.

No Projects
Results are based on username (jhunter@calpoly.edu)
## Using The Project Portlet

### STEP 10

If you have questions about a project, please contact the Facilities Help Center at 756-5555 or facilities-cbs@calpoly.edu

#### Search Projects:
Show/Hide Advanced Search

Project Number Ends With: 129

**Searching by partial number, in this example "129" will bring up any possible project matches.**

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Description</th>
<th>Project Manager</th>
<th>Building</th>
<th>Room</th>
<th>Estimated Completion Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PJ0004129</td>
<td>REPLACE EXTERIOR DOORS WITH GLASS - ADMN O1 RM 209</td>
<td>MAY, TOM</td>
<td>ADMINISTRATION</td>
<td>0209</td>
<td></td>
<td>CANCELED</td>
</tr>
<tr>
<td>PJ0005129</td>
<td>M&amp;R HOUS 15/16: REPLACE RESTROOM TYLE - CY 170 A-F</td>
<td>PINHEIRO, RICK</td>
<td>CERRO VISTA APTS - ALL</td>
<td></td>
<td></td>
<td>ASSIGNING</td>
</tr>
</tbody>
</table>
Using The Project Portlet

STEP 11

Facilities Projects

If you have questions about a project, please contact the Facilities Help Center at 756-5555 or facilities-cbs@calpoly.edu

Search Projects:
Show/Hide Advanced Search

Project Number Ends With: 
OR

Use any combination of the criteria below

Bldg. Name Contains: 
Requestor Last Name: 
Project Manager Last Name: 

Search

Switch to Advanced Search to search by Building Name, Requestor Last Name, or Project Manager Last Name.
Using The Project Portlet

STEP 12

If you have questions about a project, please contact the Facilities Help Center at 756-5555 or facilities-cbs@calpoly.edu

Search Projects:

Show/Hide Advanced Search
Project Number Ends With: 
Search

A search for "library" will return a list of any projects in the library up to 100 results.

Once you have located the project, click on the project number to view details.

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Description</th>
<th>Project Manager</th>
<th>Building</th>
<th>Room</th>
<th>Estimated Completion Date</th>
<th>Status</th>
<th>Requestor</th>
</tr>
</thead>
<tbody>
<tr>
<td>PJ0004196</td>
<td>SR 12/13: FIRE ALARM UPGRADE - KEN LIB BLD 35</td>
<td>BRENNAN, MICHAEL</td>
<td>KENNEDY LIBRARY</td>
<td></td>
<td></td>
<td>CANCELED</td>
<td>PIPAL,GAIL</td>
</tr>
</tbody>
</table>
Using The Project Portlet

STEP 13

Facilities Projects

If you have questions about a project, please contact the Facilities Help Center at 736-5555 or facilities-cbs@calpoly.edu

Search Projects:
Show/Hide Advanced Search
Project Number Ends With:
Search

Project Details - PJ0004196
Project costs reflect those posted through the end of the previous business day. Costs are not final until the project status displayed is "closed".

<< Back to Projects

Click "Back to Projects" at anytime to return to your search screen

Overview

<table>
<thead>
<tr>
<th>Project Number</th>
<th>PJ0004196</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>SR 12/13: FIRE ALARM UPGRADE - KEN LIB BLD 35</td>
</tr>
<tr>
<td>Project Manager</td>
<td>BRENNAN, MICHAEL</td>
</tr>
<tr>
<td>Building</td>
<td>KENNEDY LIBRARY</td>
</tr>
<tr>
<td>Room</td>
<td></td>
</tr>
<tr>
<td>Request Date</td>
<td>22-JUN-2012</td>
</tr>
<tr>
<td>Estimated Completion Date</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>CANCELED</td>
</tr>
<tr>
<td>Requestor</td>
<td>PIRAL, GAIL</td>
</tr>
</tbody>
</table>

Estimated Total Cost: 0.00
Actual Costs: 0.00
Contract Encumbrance: 0.00
Total Cost: 0.00
Balance: 0.00

Project Work Orders - PJ0004196
Scroll right, using arrow keys, to view more columns

|-------------------|-------------|--------|-------------|----------------------|-----------------------|--------------------|----------------------|---------------------|------------------------|-----------------------|------------------------|-----------------------|---------------------|-------------|---------|

afd.calpoly.edu/facilities
Using The Project Portlet

STEP 14

Project Work Orders - PJ0004196

*Remember* Project costs reflect those posted through the end of the previous business day. Costs are not final until the project status displayed is "closed".

<table>
<thead>
<tr>
<th>Work Order Number</th>
<th>Description</th>
<th>Status</th>
<th>Assigned To Name</th>
<th>Estimated Total Cost</th>
<th>Estimated Labor Hours</th>
<th>Actual Labor Hours</th>
<th>Estimated Labor Cost</th>
<th>Actual Labor Cost</th>
<th>Estimated Material Cost</th>
<th>Actual Material Cost</th>
<th>Estimated Contract Cost</th>
<th>Actual Contract Cost</th>
<th>Contract Encumbance</th>
</tr>
</thead>
<tbody>
<tr>
<td>W00260051</td>
<td>CP: PROJECT CONTINGENCY</td>
<td>CANCELED</td>
<td>GALVEZ, CESAR</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Chartfield Strings - PJ0004196

If you need to correct the chart-field please contact your project manager.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Fund</th>
<th>Dept Id</th>
<th>Account</th>
<th>Program</th>
<th>Project</th>
<th>Class</th>
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</thead>
<tbody>
<tr>
<td>100</td>
<td>51.001</td>
<td>209800</td>
<td>660021</td>
<td>5R-4196</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<< Back to Projects
Facilities Service Requests

Wendy Macdonald
wmacdona@calpoly.edu
756-7556

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