



Facilities Project Portlet

My Cal Poly Portal
my.calpoly.edu

afd.calpoly.edu/facilities

Facilities Project Portlet

The purpose of the Facilities Project Portlet is to provide easy access to project details and status. This step by step guide will walk you through adding the portlet to your my.calpoly portal and how to use the portlet. For more information about the minor project process please visit the website at https://afd.calpoly.edu/facilities/services_minorconstruction.asp

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Setting Up Your Project Portlet

STEP 1

The screenshot displays the Cal Poly Project Portlet interface. At the top right, there is a navigation bar with a dropdown menu showing '15 EForms Workitems', a counter '0', and a user greeting 'Welcome Jessica Hunter | Sign Out'. Below this is a search bar with the text 'Search' and a 'Go' button. A red text overlay with an underline reads: 'Add a tab for Facilities by clicking the "Add Tab" button'. The 'Add Tab' button is circled in red. To the right of the 'Add Tab' button is a 'Customize' dropdown menu. The main content area is divided into two sections. The left section contains a blue banner with the text 'Take up to 4 hours to update. Visit the for your latest class information'. The right section is titled 'Training Resources' and features a large image of a green field with the text 'Training Resources for Cal Poly Faculty and Staff' overlaid.

Setting Up Your Project Portlet

STEP 2

The screenshot shows the 'My Cal Poly Portal' interface. At the top left is the Cal Poly San Luis Obispo logo. To its right is the text 'My Cal Poly Portal'. Below this is a navigation bar with links: Home, Academics, Money Matters, Personal Info, Library, eAP101, and a 'My Tab' button. The 'My Tab' button is circled in red. Below the navigation bar is a section titled 'Customize this page' with the text: 'You can Add Portlets, change the page Layout, and pick your Skin. Click the CUSTOMIZE handle to get started.' At the bottom left is a 'Single Click Links' section with a left arrow. It contains two links: 'PolyPlanner' with a clock icon and 'Email and Calendar' with a calendar icon.

The default title of a new tab is "My Tab" click into the field to change the title

Setting Up Your Project Portlet

STEP 3

The screenshot shows the 'My Cal Poly Portal' interface. At the top left is the Cal Poly San Luis Obispo logo. To its right is the text 'My Cal Poly Portal'. Below this is a navigation bar with links: Home, Academics, Money Matters, Personal Info, Library, eAP101, and a dropdown menu. The dropdown menu is open, showing a new tab titled 'Facilities Projects' with a close button (X). This tab is circled in red. Below the navigation bar is a section titled 'Customize this page' with the text: 'You can Add Portlets, change the page Layout, and pick your Skin. Click the CUSTOMIZE handle to get started.' On the left side, there is a 'Single Click Links' section with two links: 'PolyPlanner' and 'Email and Calendar'. To the right of the 'Facilities Projects' tab, there is a red text instruction: Change the title of your new tab to "Facilities Projects", "Facilities" or another title of your choice.

Setting Up Your Project Portlet

STEP 4

tal **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.**

15 EForms Workitems ▼ 0 ▼ Welcome Jessica Hunter | Sign Out

Search Go

Info Library eAP101 Facilities Projects x

Add To Customize ▲

Conference
in President Armstrong for the 2014 Fall Conference Session & Reception

Academic Schedule
View your registration date and register for classes. KEYWORDS: poly planner, student planning calendar, finals schedule, cpreg

Account Summary
View payments due, recent payments, and financial aid information. Check balances and activity on your Cal Poly account and make payments.

Classifieds
to sell and buy various items such as books, furniture, and much more. Keywords: want, for sale, trade

ASI News
Check out exciting events and activities sponsored by ASI

Cal Poly Glossary
Glossary of well-used terms specific to Cal Poly. KEYWORDS: glossary, terms, newly, admitted, newly admitted

n. Click the CUSTOMIZE handle to get started.

Setting Up Your Project Portlet

STEP 5

The screenshot shows the 'My Cal Poly Portal' interface. At the top, there's a navigation bar with links: Home, Academics, Money Matters, Personal Info, Library, eAP101, and Facilities Projects. Below this is a section titled 'Add Portlets'. On the left, there's a sidebar with options: 'Use Now!', 'Colors', 'Layouts', and 'I'm Done'. In the center, there's a search bar with the text 'facil' entered and a 'Search' button. To the right of the search bar, there's a list of categories. The 'Facilities Projects' category is highlighted, and an 'Add' button is visible next to it. A red arrow points from the 'Add' button to the 'Facilities Projects' category. Another red arrow points from the 'Add' button to the 'Single Click Access' section. A red box highlights the search bar and the 'Search' button. A red box highlights the 'Add' button. A red box highlights the 'Facilities Projects' category. A red box highlights the 'Single Click Access' section.

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

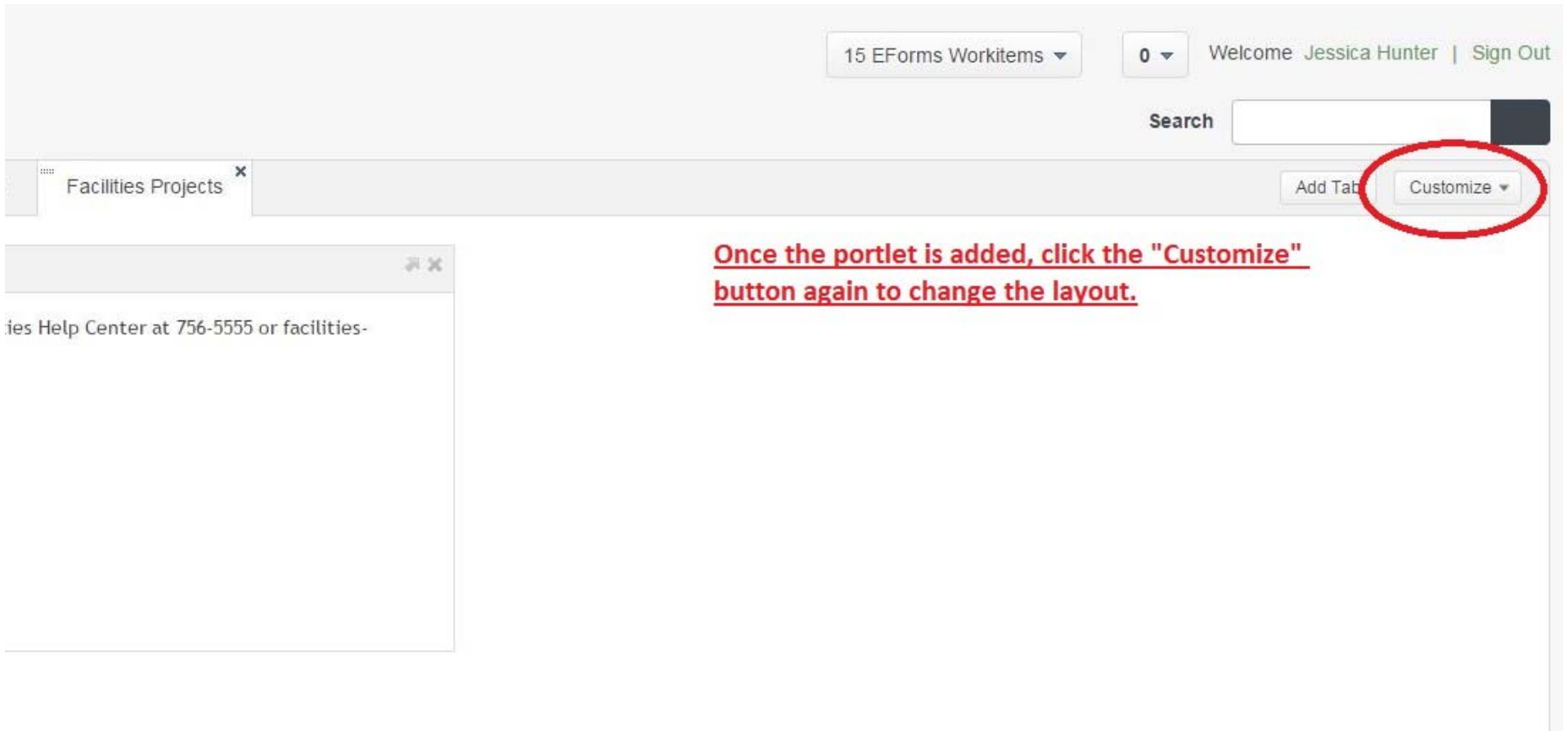
Customize this page
You can Add Portlets, change the page Layout, and pick your Skin. Click the CUSTOMIZE handle to get started.

Single Click Links <

- PolyPlanner
- Email and Calendar

Setting Up Your Project Portlet

STEP 6



The screenshot shows the top navigation bar of the Cal Poly AFD system. It includes a dropdown for '15 EForms Workitems', a notification count of '0', and a user profile for 'Jessica Hunter' with a 'Sign Out' link. A search bar is also present. Below the navigation bar, a tab labeled 'Facilities Projects' is active. In the bottom right corner of the interface, the 'Add Tab' and 'Customize' buttons are visible. The 'Customize' button is circled in red. A red text overlay with underlines reads: 'Once the portlet is added, click the "Customize" button again to change the layout.'

15 EForms Workitems ▼ 0 ▼ Welcome Jessica Hunter | Sign Out

Search

Facilities Projects x

Add Tab Customize ▼

Once the portlet is added, click the "Customize"
button again to change the layout.

Setting Up Your Project Portlet

STEP 7

My Cal Poly Portal

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

The screenshot shows the 'My Cal Poly Portal' layout selection interface. At the top, there is a navigation bar with links: Home, Academics, Money Matters, Personal Info, Library, eAP101, and Facilities Projects. Below this is a row of layout options. The '1 Column Full-width' option is circled in red. Other options include '2 Columns Narrow, wide', '2 Columns Even' (highlighted with a green border), '2 Columns Wide, narrow', '3 Columns Even', '3 Columns Narrow, wide, narrow', and '4 Columns Even'. On the left side of the layout selection area, there are buttons for 'Add Portlets', 'Use Now!', 'Colors', 'Layouts', and 'I'm Done'.

The screenshot shows the 'Facilities Projects' portlet. On the left, there is a 'Single Click Links' sidebar with icons and text for: PolyPlanner, Email and Calendar, Student & HR Administration, CSU Portal- Financial Administration, PolyData Dashboards, Campus Wiki, and Student Assistant Management. The main content area of the portlet has a title 'Facilities Projects' and a close button. Below the title, it says: 'If you have questions about a project, please contact the Facilities Help Center at 756-5555 or facilities-cbs@calpoly.edu'. There is a 'Search Projects:' section with a 'Show/Hide Advanced Search' link. Below this is a search form with the label 'Project Number Ends With:' and a text input field. A 'Search' button is located below the input field. At the bottom of the portlet, it says 'No Projects' and 'Results are based on username (jhunter@calpoly.edu)'.

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.

Home Academics Money Matters Personal Info Library eAP101 Facilities Projects

Add Portlets Use Now! Colors Layouts

I'm Done

Single Click Links

- PolyPlanner
- Email and Calendar
- Student & HR Administration
- CSU Portal- Financial Administration
- PolyData Dashboards
- Campus Wiki
- Student Assistant

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:


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


Now you're ready to begin using the portlet!


STEP 9


[Home](#) [Academics](#) [Money Matters](#) [Personal Info](#) [Library](#) [eAP101](#) [Facilities Projects](#) ×


Single Click Links <


 PolyPlanner


 Email and Calendar

 Student & HR Administration

 CSU Portal- Financial Administration

 PolyData Dashboards

 Campus Wiki

 Student Assistant Management

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

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

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.

Using The Project Portlet

STEP 10

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:

Projects
Results are based on project number ending with (129)

Project Number ▲▼	Description ▲▼	Project Manager ▲▼	Building ▲▼	Room ▲▼	Estimated Completion Date ▲▼	Status ▲▼
PJ0004129	REPLACE EXTERIOR DOORS WITH GLASS - ADMN 01 RM 209	MAY, TOM	ADMINISTRATION	0209		CANCELED
PJ0005129	M&R HOUS 15/16: REPLACE RESTROOM TILE - CV 170 A-F	PINHEIRO, RICK	CERRO VISTA APTS - ALL			ASSIGNING

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

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:

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



afd.calpoly.edu/facilities

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Using The Project Portlet

STEP 12

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:

Projects
 Results are based on building name (library)

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.

Project Number ^v	Description ^v	Project Manager ^v	Building ^v	Room ^v	Estimated Completion Date ^v	Status ^v	Requestor
PJ0004196	SR 12/13: FIRE ALARM UPGRADE - KEN LIB BLD 35	BRENNAN, MICHAEL	KENNEDY LIBRARY			CANCELED	PIPAL,GAIL,

Using The Project Portlet

STEP 13

The overview section provides a summary of useful information

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:

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

Project Number	PJ0004196	Estimated Total Cost	0.00
Description	SR 12/13: FIRE ALARM UPGRADE - KEN LIB BLD 35	Actual Costs	0.00
Project Manager	BRENNAN, MICHAEL	Contract Encumbrance	0.00
Building	KENNEDY LIBRARY	Total Cost	0.00
Room		Balance	0.00
Request Date	22-JUN-2012		
Estimated Completion Date			
Status	CANCELED		
Requestor	PIPAL,GAIL,		

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

Work Order Number	Description	Status	Assigned To Name	Estimated Total Cost	Estimated Labor Hours	Actual Labor Hours	Estimated Labor Cost	Actual Labor Cost	Estimated Material Cost	Actual Material Cost	Estimated Contract Cost	Actual Contract Cost	Contract Encumbrance	Project Total	Balance
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Using The Project Portlet

STEP 14

Project Work Orders - PJ0004196

Scroll right, using arrow keys, to view more columns

***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".**

Work Order Number	Description	Status	Assigned To Name	Estimated Total Cost	Estimated Labor Hours	Actual Labor Hours	Estimated Labor Cost	Actual Labor Cost	Estimated Material Cost	Actual Material Cost	Estimated Contract Cost	Actual Contract Cost	Contract Encumbrance
W00206051	CP: PROJECT CONTINGENCY	CANCELED	GALVEZ, CESAR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Chartfield Strings - PJ0004196

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

Percentage	Fund	Dept Id	Account	Program	Project	Class
100	SL001	209800	660021		SR4196	

<< Back to Projects

The details reflected under Project Work Orders are based on the signed approved estimate form, which is completed before a project begins, and any costs currently posted.

*When reconciling please note PeopleSoft Finance is only updated **once** per month.*

Questions?

■ Information

- ❑ Facilities Web Site

<https://afd.calpoly.edu/facilities/>

- ❑ 756-5555





Facilities Project Portlet

my.calpoly.edu

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