Facilities Project Portlet

My Cal Poly Portal

my.calpoly.edu
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**

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

[Image of a tab titled "Training Resources"]

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

STEP 2

My Cal Poly Portal

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

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

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

STEP 3

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

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Setting Up Your Project Portlet

STEP 6

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.

Facilities Projects

1 Column

2 Columns

2 Columns

2 Columns

3 Columns

3 Columns

4 Columns

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)

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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:
Show/Hide Advanced Search
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

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: 129
Search

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

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

<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 01 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 TILE - 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

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

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

The overview section provides a summary of useful information.
STEP 14

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.

*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".

### Chartfield Strings - PJ0004196

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

### Project Work Orders - PJ0004196

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

afd.calpoly.edu/facilities
Questions?

Information

- Facilities Web Site
  https://afd.calpoly.edu/facilities/
- 756-5555
Facilities Project Portlet
my.calpoly.edu

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