Project Intake

FS and PD&C Together

UCR
UNIVERSITY OF CALIFORNIA, RIVERSIDE

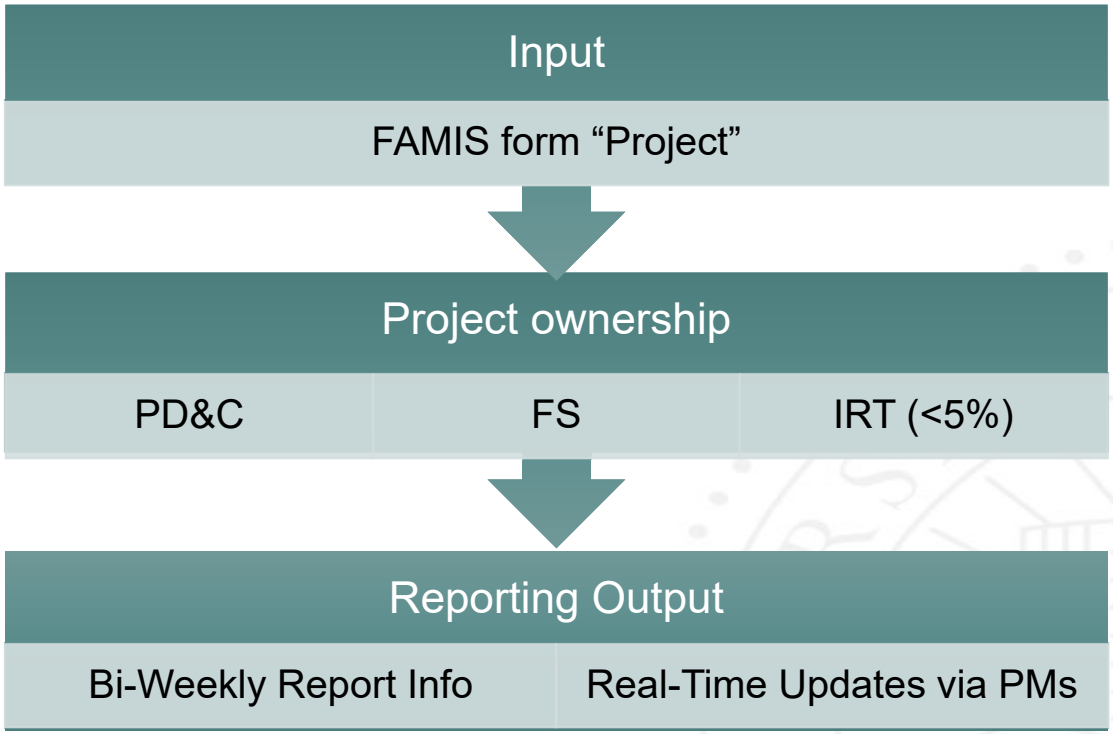
January 2019

Customer Relations

Today's Agenda

- Project Intake General Flow
- Updates to Project Intake Process
- How to submit a Project Request
- How to check the status of a Project
- Questions & Feedback

Project Intake General Flow



Meeting Feedback: *Campus Permitting Process*

Project Flow

FS

- SL5 prioritized multi-trade projects worked throughout quarter

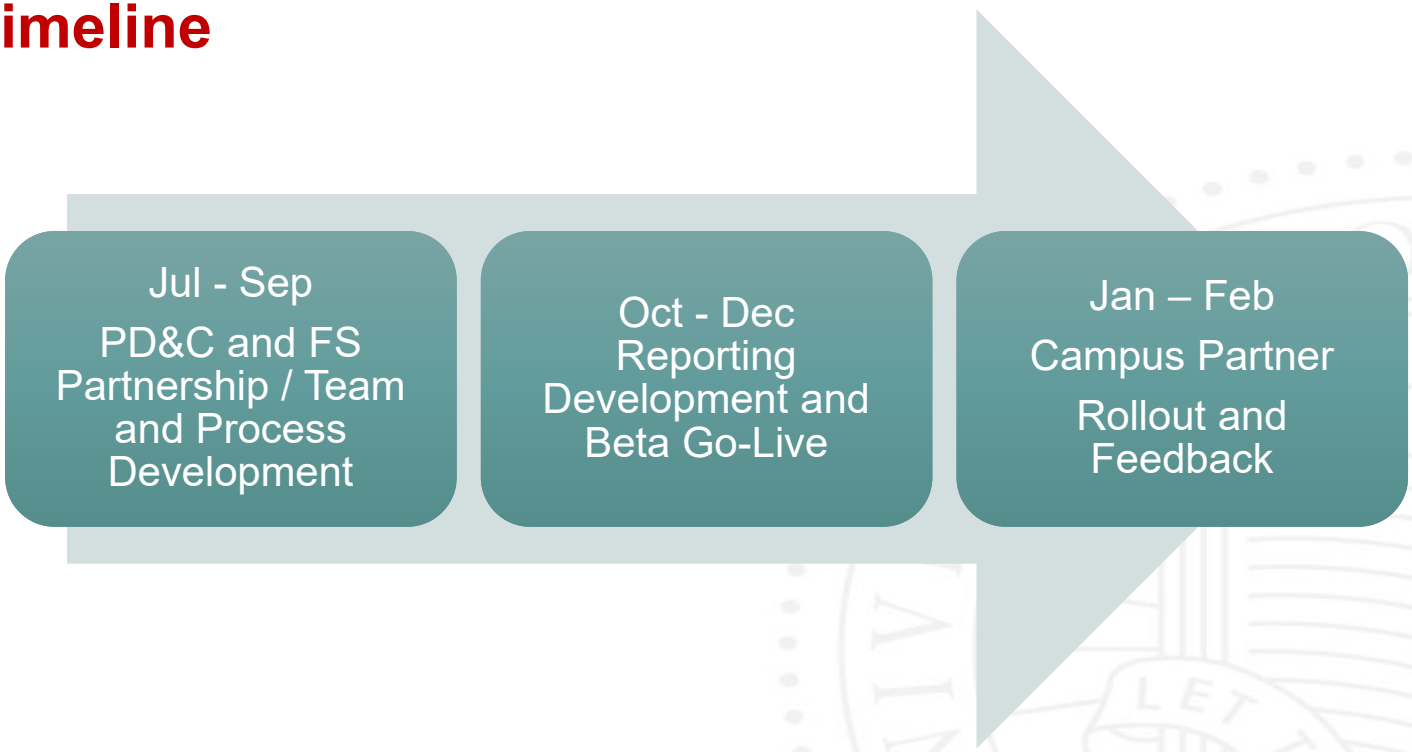
PD&C

- $35K - $750K Minor Cap Projects
- >$750K Major Cap Project
- All supported by PD&C PMs

Customer relations has come together to support both FS and PD&C through the intake and output process for all projects

Project Intake Update

Timeline



How to submit a Project request

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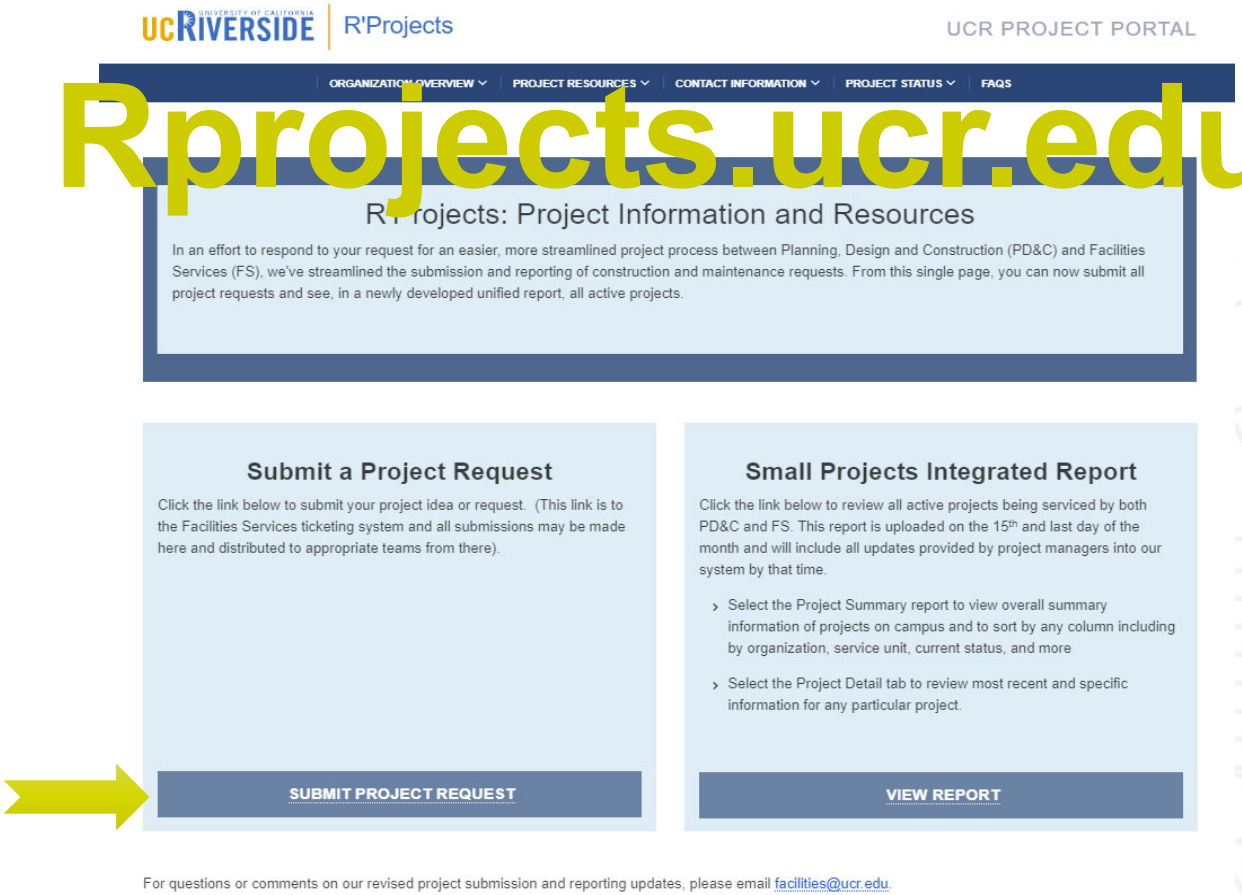
Revised, Unified, Searchable, Reporting (Output)



Project Submission (Input)

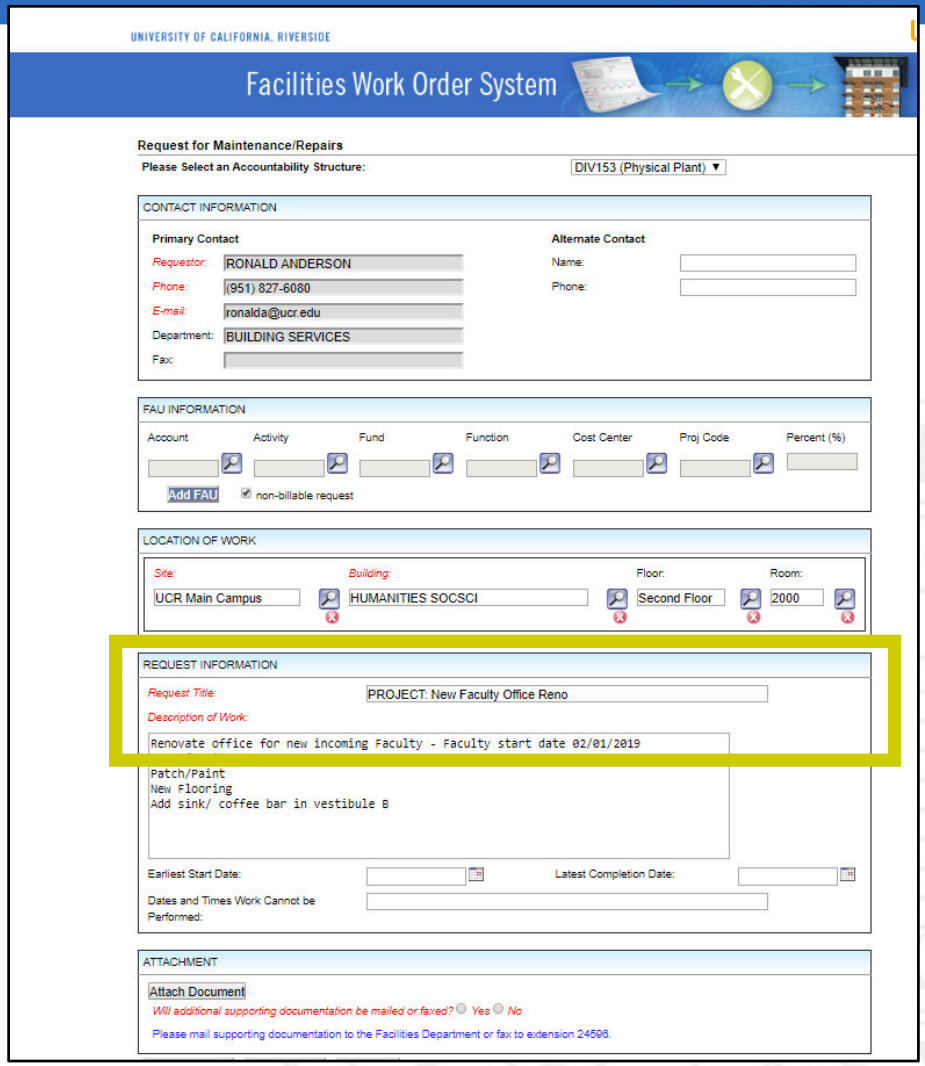
1. All project submissions will be entered through a single source – existing Facilities Work Order System

2. Front Desk team will process to appropriate department (PD&C or FS) or for IRT review if necessary

3. Replacing google form - providing single project input point

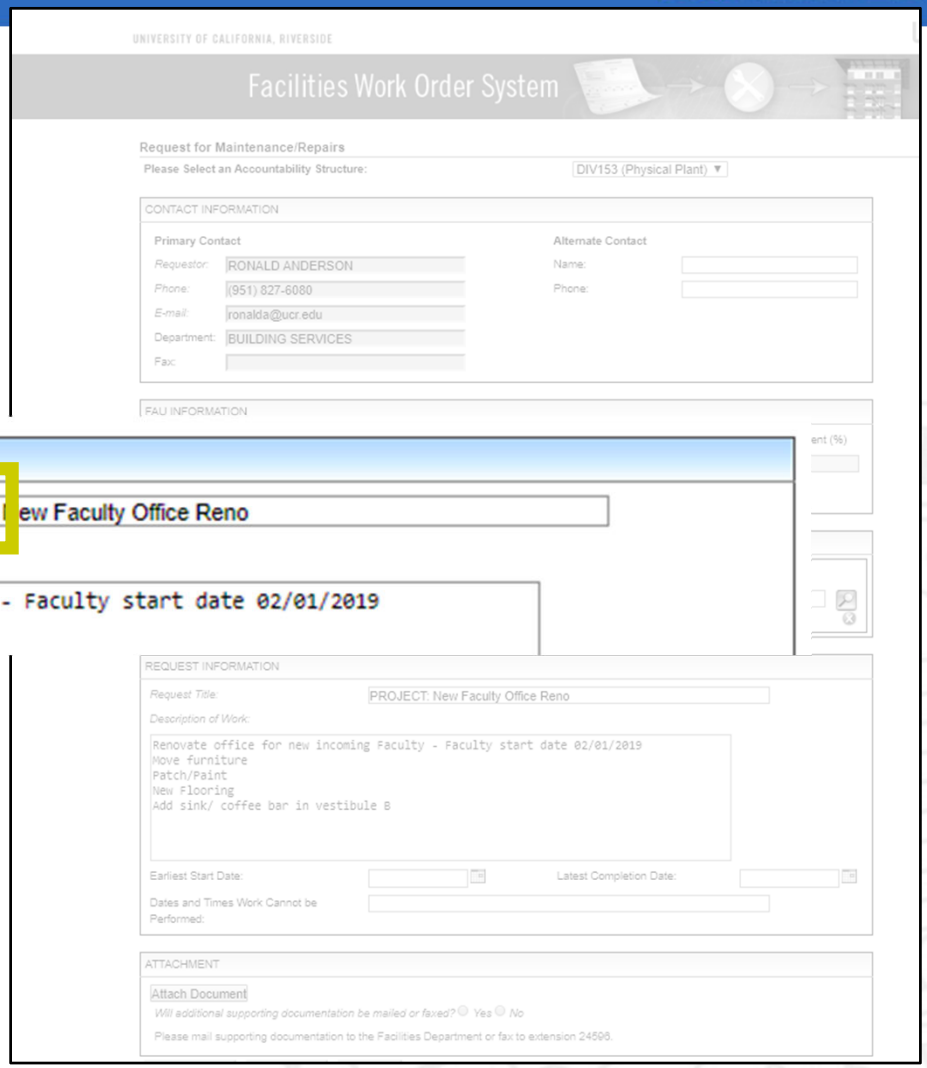
Future Goals:
When ITS support is available, we will create a custom entry form which is project specific.

facilities@ucr.edu



Project Submission (Input)

1. All project submissions will be entered through a single source – existing Facilities Work Order System
2. Front Desk team will process to appropriate department – D&C or F
3. F s



REQUEST INFORMATION

Request Title: PROJECT: New Faculty Office Reno

Description of Work:

Renovate office for new incoming Faculty - Faculty start date 02/01/2019
Move furniture
Patch/Paint

Future Goals:
When ITS support is available, we will create a custom entry form which is project specific.

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How to check on the status of a Project

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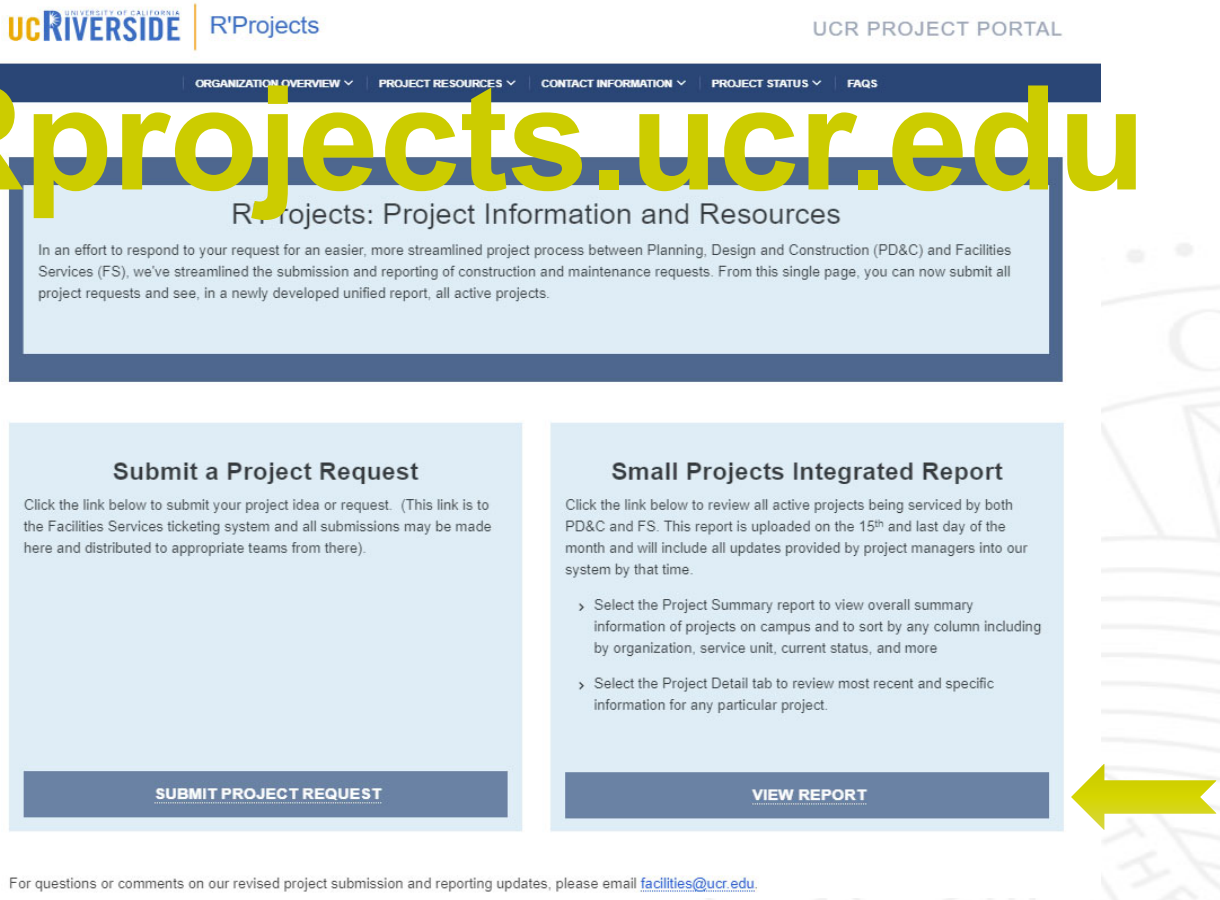
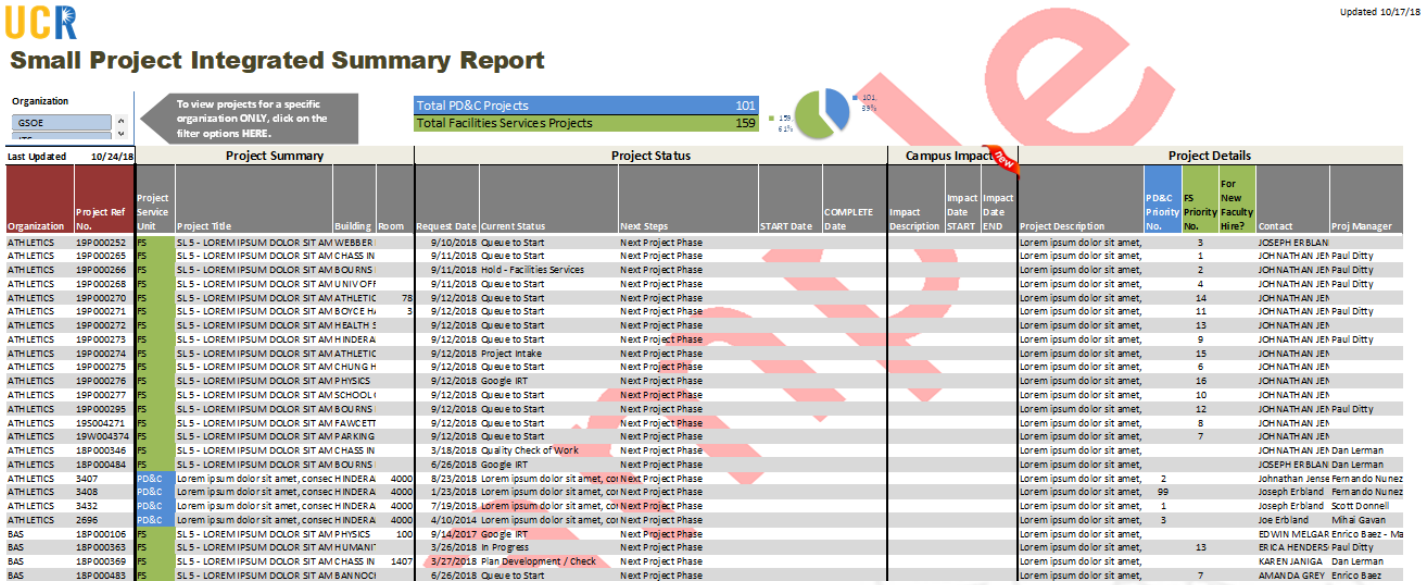
Revised, Unified, Searchable, Reporting (Output)



Revised, Unified, Searchable, Reporting (Output)

- Beta format through February
- Offers customer the ability to sort by multiple fields including Organization, Project Service Unit (PD&C vs FS) and Prioritization



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Small Project Integrated Summary Report

Updated 10/17/18

Organization: GSOE

To view projects for a specific organization ONLY, click on the filter options HERE.

Total PD&C Projects 101
Total Facilities Services Projects 159

Last Updated	10/24/18	Project Summary				Project Status					Campus Impact			Project Details					
Organization	Project Ref No.	Project Service Unit	Project Title	Building	Room	Request Date	Current Status	Next Steps	START Date	COMPLETE Date	Impact Description	Impact Date START	Impact Date END	Project Description	PD&C Priority No.	FS Priority No.	For New Faculty Hire?	Contact	Proj Manager
ATHLETICS	19P000252	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	WEBBER		9/10/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		3		JOSEPH ERBLAN	
ATHLETICS	19P000265	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	CHASS IN		9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		1		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19P000266	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	BOURNS		9/11/2018	Hold - Facilities Services	Next Project Phase						Lorem ipsum dolor sit amet,		2		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19P000268	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	UNIV OFF		9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		4		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19P000270	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	ATHLETIC	78	9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		14		JOHNATHAN JEN	
ATHLETICS	19P000271	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	BOYCE H	3	9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		11		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19P000272	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	HEALTH S		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		13		JOHNATHAN JEN	
ATHLETICS	19P000273	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	HINDER A		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		9		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19P000274	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	ATHLETIC		9/12/2018	Project Intake	Next Project Phase						Lorem ipsum dolor sit amet,		15		JOHNATHAN JEN	
ATHLETICS	19P000275	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	CHUNG H		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		6		JOHNATHAN JEN	
ATHLETICS	19P000276	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	PHYSICS		9/12/2018	Google IRT	Next Project Phase						Lorem ipsum dolor sit amet,		16		JOHNATHAN JEN	
ATHLETICS	19P000277	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	SCHOOL I		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		10		JOHNATHAN JEN	
ATHLETICS	19P000295	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	BOURNS		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		12		JOHNATHAN JEN	Paul Ditty
ATHLETICS	19S004271	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	FAWCETT		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		8		JOHNATHAN JEN	
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ATHLETICS	1BP000346	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	CHASS IN		3/18/2018	Quality Check of Work	Next Project Phase						Lorem ipsum dolor sit amet,				JOHNATHAN JEN	Dan Lerman
ATHLETICS	1BP000484	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	BOURNS		6/26/2018	Google IRT	Next Project Phase						Lorem ipsum dolor sit amet,				JOSEPH ERBLAN	Dan Lerman
ATHLETICS	3407	PD&C	Lorem ipsum dolor sit amet, consec	HINDER A	4000	8/23/2018	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,	2			Johnathan Jense	Fernando Nunez
ATHLETICS	3408	PD&C	Lorem ipsum dolor sit amet, consec	HINDER A	4000	1/23/2018	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,	99			Joseph Erbland	Fernando Nunez
ATHLETICS	3432	PD&C	Lorem ipsum dolor sit amet, consec	HINDER A	4000	7/19/2018	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,	1			Joseph Erbland	Scott Donnell
ATHLETICS	2696	PD&C	Lorem ipsum dolor sit amet, consec	HINDER A	4000	4/10/2014	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,	3			Joe Erbland	Mihai Gavan
BAS	1BP000106	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	PHYSICS	100	9/14/2017	Google IRT	Next Project Phase						Lorem ipsum dolor sit amet,				EDWIN MELGAR	Enrico Baez - Ma
BAS	1BP000363	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	HUMANI		3/26/2018	In Progress	Next Project Phase						Lorem ipsum dolor sit amet,		13		ERICA HENDERS	Paul Ditty
BAS	1BP000369	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	CHASS IN	1407	3/27/2018	Plan Development / Check	Next Project Phase						Lorem ipsum dolor sit amet,				KAREN JANIGA	Dan Lerman
BAS	1BP000483	FS	SL 5 - LOREM IPSUM DOLOR SIT AM	BANNOCI		6/26/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		7		AMANDA GREY	Enrico Baez

Revised, Unified, Searchable, Reporting (Output)

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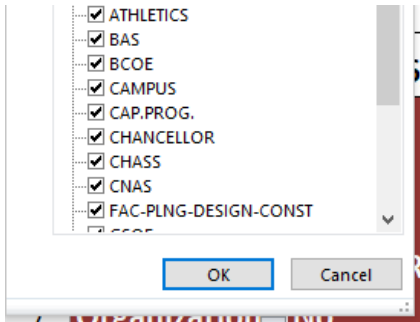
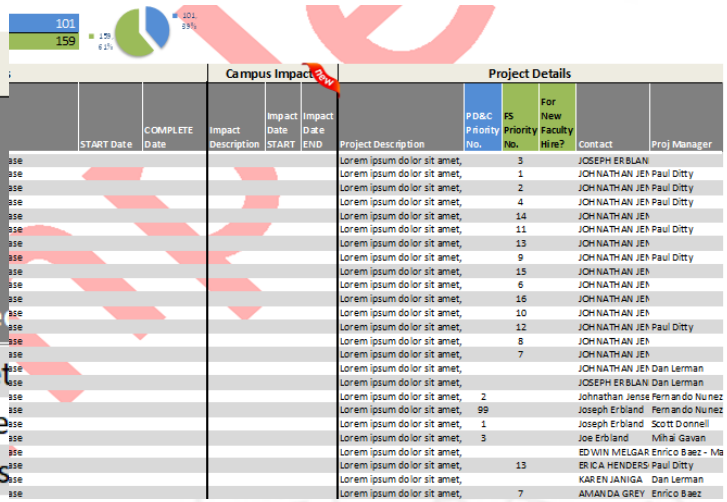
Total Active PD&C Projects	127
Total Active FS Projects	92

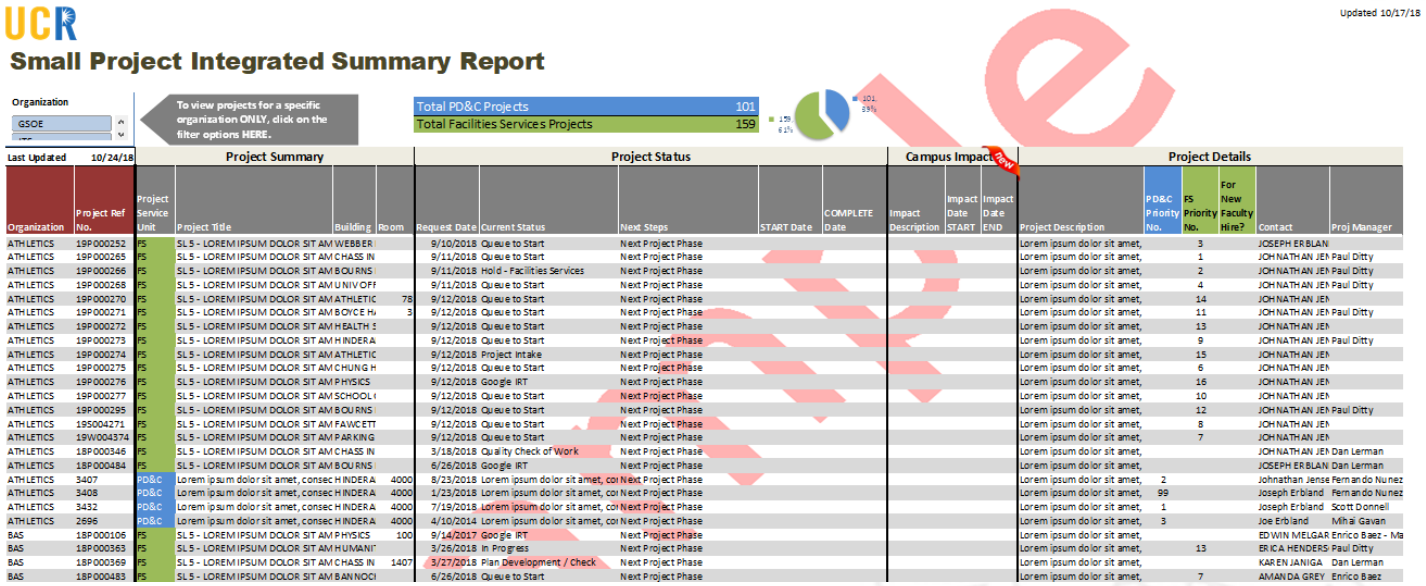


	Organization	No.	Project Service Unit	Proje
8	ATHLETICS	3432	PD&C	Athlet
9	ATHLETICS	2696	PD&C	Socce
10	ATHLETICS	3408	PD&C	Harris
11	ATHLETICS	3407	PD&C	Athlet
12	ATHLETICS	19P000274	FS	SL5-R



Revised, Unified, Searchable, Reporting (Output)

- Streamlined and scheduled availability – 1st and 16th of every month



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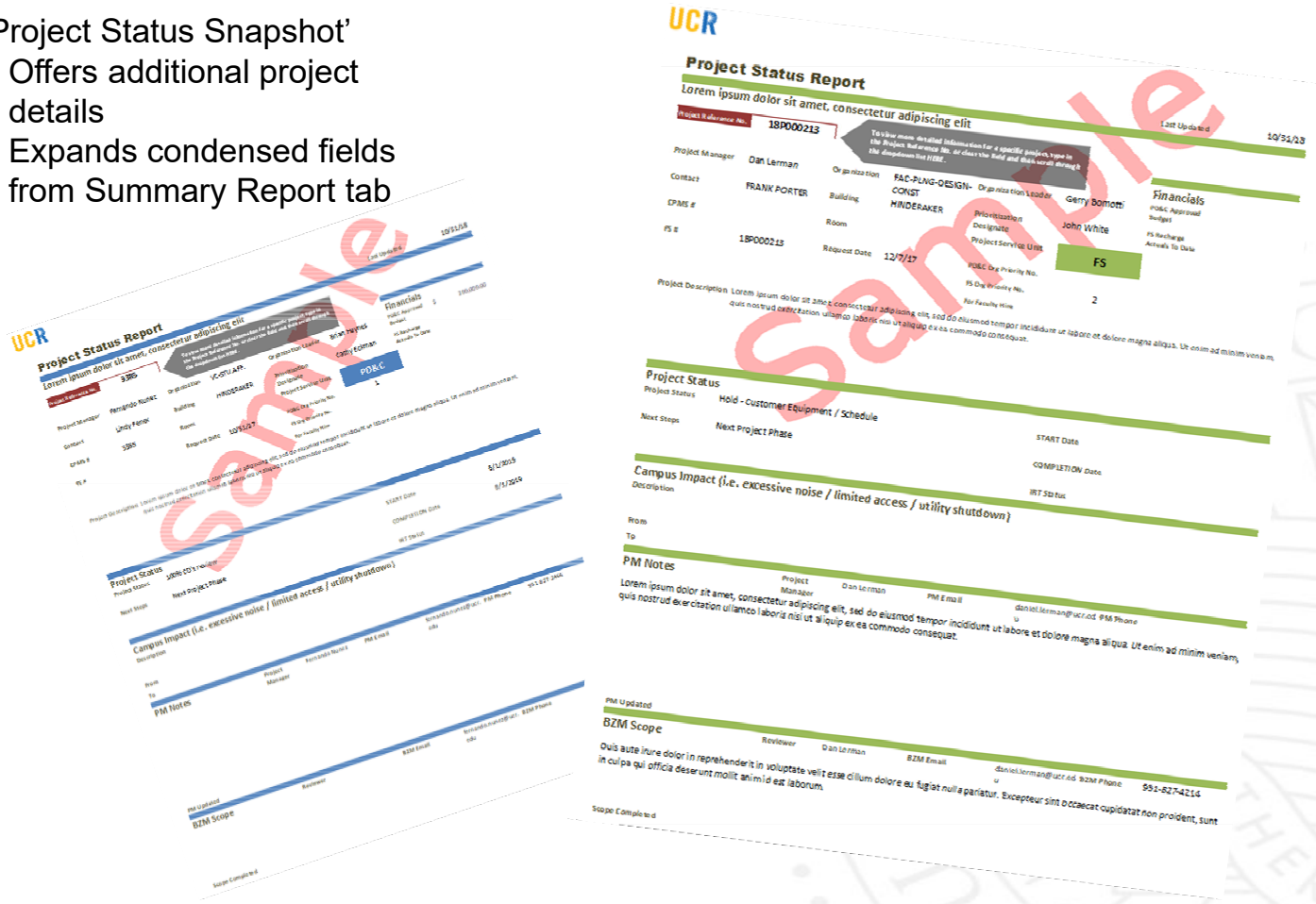
Revised, Unified, Searchable, Reporting (Output)

'Project Status Snapshot'

- Offers additional project details
- Expands condensed fields from Summary Report tab



Questions & Feedback

- We value your continued feedback to help improve how we can best serve your business needs.
- Please complete the **questionnaire** regarding your experience today.

Thank you!

Facilities@ucr.edu (951) 827-4214

Monty Anderson – monty.anderson@ucr.edu
Linda Bejenaru – linda.bejenaru@ucr.edu
Loretta Vandivier – loretta.vandivier@ucr.edu
Alan Siero – alan.siero@ucr.edu

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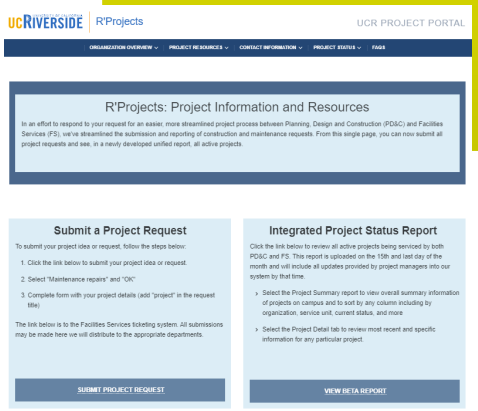
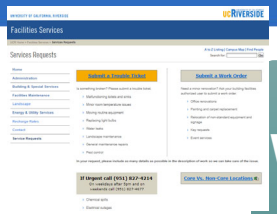
Today's Lunch & Learn

R'Projects





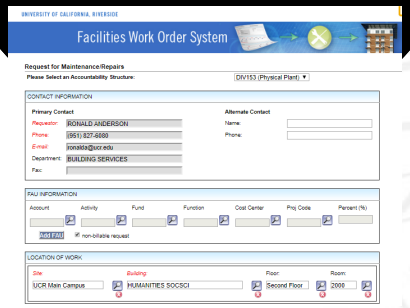
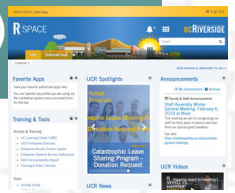
Facilities Website (Trouble Ticket or Service Request)

CPMS (Org Approver)

Input to FAMIS by FS

FAMIS

Work Order System



R'Space (authorized users only)