

Project Intake

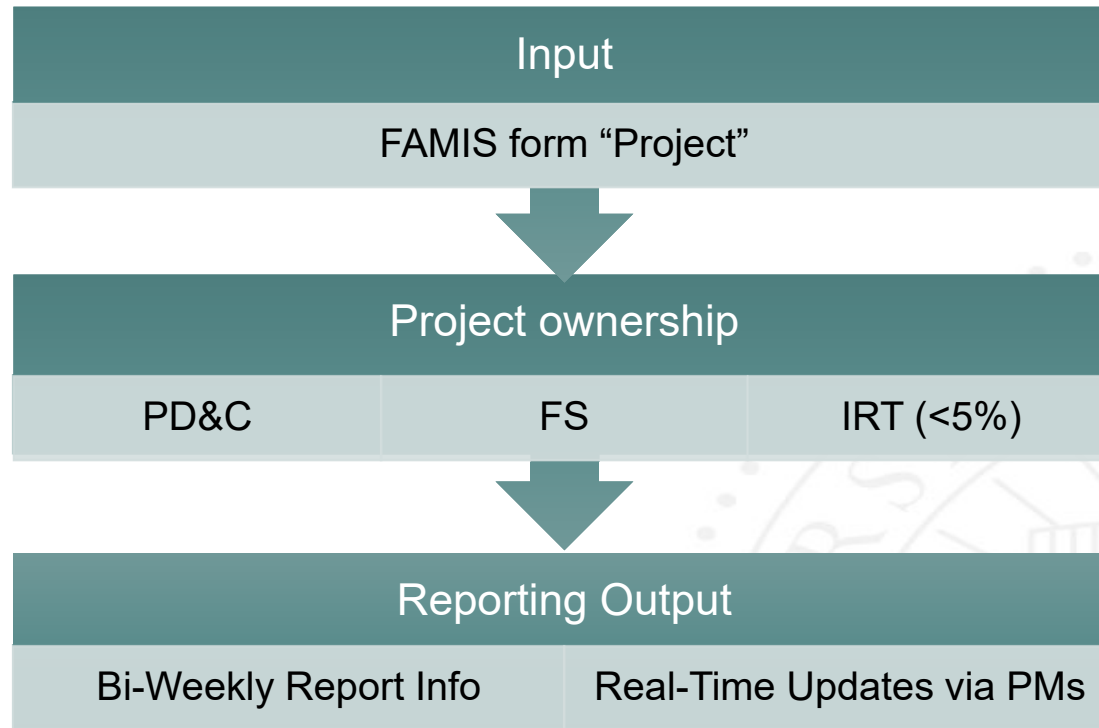
FS and PD&C Together

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**

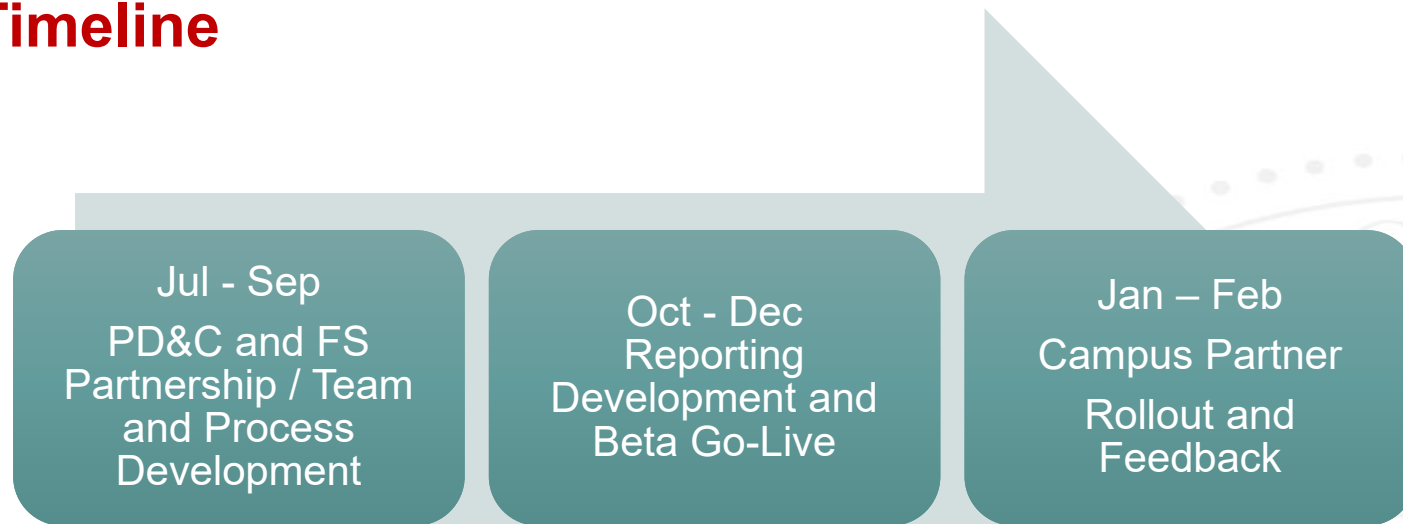
PD&C

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

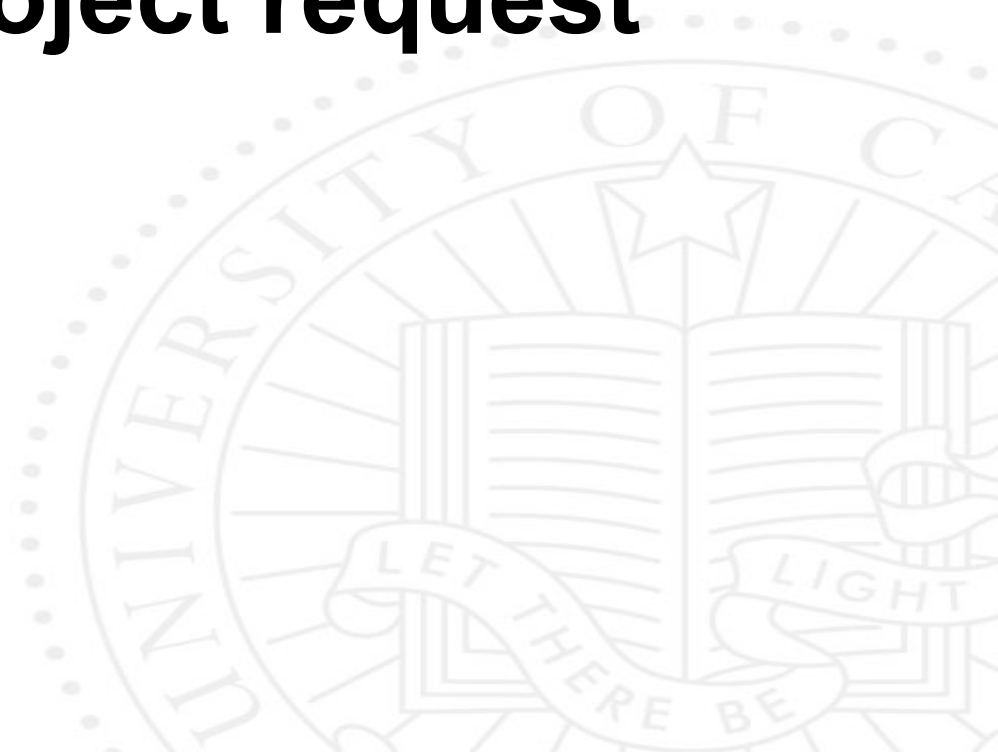
Customer relations has come together to support both FS and PD&C through the intake and output process for all projects

Project Intake Update

Timeline



How to submit a Project request



Revised, Unified, Searchable, Reporting (Output)

R'Projects | UCR PROJECT PORTAL

ORGANIZATION OVERVIEW | PROJECT RESOURCES | CONTACT INFORMATION | PROJECT STATUS | FAQs

R'Projects: Project Information and Resources

In an effort to respond to your request for an easier, more streamlined project process between Planning, Design and Construction (PD&C) and Facilities Services (FS), we've streamlined the submission and reporting of construction and maintenance requests. From this single page, you can now submit all project requests and see, in a newly developed unified report, all active projects.

Submit a Project Request

Click the link below to submit your project idea or request. (This link is to the Facilities Services ticketing system and all submissions may be made here and distributed to appropriate teams from there).

[SUBMIT PROJECT REQUEST](#)

Small Projects Integrated Report

Click the link below to review all active projects being serviced by both PD&C and FS. This report is uploaded on the 15th and last day of the month and will include all updates provided by project managers into our system by that time.

- > Select the Project Summary report to view overall summary information of projects on campus and to sort by any column including by organization, service unit, current status, and more
- > Select the Project Detail tab to review most recent and specific information for any particular project.

[VIEW REPORT](#)

For questions or comments on our revised project submission and reporting updates, please email 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 (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

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Facilities Work Order System

Request for Maintenance/Repairs
Please Select an Accountability Structure: DIV153 (Physical Plant)

CONTACT INFORMATION

Primary Contact
Requestor: RONALD ANDERSON
Phone: (951) 827-6080
E-mail: ronald@ucr.edu
Department: BUILDING SERVICES
Fax:

Alternate Contact
Name:
Phone:

FAU INFORMATION

Account	Activity	Fund	Function	Cost Center	Proj Code	Percent (%)

Add FAU non-billable request

LOCATION OF WORK

Site: UCR Main Campus Building: HUMANITIES SOCSCI Floor: Second Floor Room: 2000

REQUEST INFORMATION

Request Title: PROJECT: New Faculty Office Reno
Description of Work: Renovate office for new incoming Faculty - Faculty start date 02/01/2019

Patch/Paint
New Flooring
Add sink/ coffee bar in vestibule B

Earliest Start Date: Latest Completion Date:

Dates and Times Work Cannot be Performed:

ATTACHMENT

Attach Document
Will additional supporting documentation be mailed or faxed? Yes No
Please mail supporting documentation to the Facilities Department or fax to extension 24590.

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 Facilities)

3. Front Desk team will enter the following 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.

facilities@ucr.edu

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Facilities Work Order System

Request for Maintenance/Repairs
Please Select an Accountability Structure: DIV153 (Physical Plant)

CONTACT INFORMATION

Primary Contact		Alternate Contact	
Requestor:	RONALD ANDERSON	Name:	
Phone:	(951) 827-6080	Phone:	
E-mail:	ronalda@ucr.edu		
Department:	BUILDING SERVICES		
Fax:			

FAU INFORMATION

ent (%)

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

REQUEST INFORMATION

Request Title: PROJECT: New Faculty Office Reno

Description of Work:
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Move furniture
Patch/Paint
New flooring
Add sink/ coffee bar in vestibule B

Earliest Start Date: [] [] [] Latest Completion Date: [] [] []

Dates and Times Work Cannot be Performed: [] [] []

ATTACHMENT

Attach Document

Will additional supporting documentation be mailed or faxed? Yes No

Please mail supporting documentation to the Facilities Department or fax to extension 24599.

How to check on the status of a Project



Revised, Unified, Searchable, Reporting (Output)

UCRIVERSIDE | R'Projects UCR PROJECT PORTAL

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[VIEW REPORT](#)

For questions or comments on our revised project submission and reporting updates, please email facilities@ucr.edu.

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



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

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	SL5 - 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	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		1		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000266	FS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			9/11/2018	Hold - Facilities Services	Next Project Phase						Lorem ipsum dolor sit amet,		2		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000268	FS	SL5 - LOREM IPSUM DOLOR SIT AM UNIV OFF			9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		4		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000270	FS	SL5 - LOREM IPSUM DOLOR SIT AM ATHLETIC	78		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		14		JOHNATHAN JEH	
ATHLETICS	19P000271	FS	SL5 - LOREM IPSUM DOLOR SIT AM BOYCE HU	3		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		11		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000272	FS	SL5 - LOREM IPSUM DOLOR SIT AM HEALTH S			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		13		JOHNATHAN JEH	
ATHLETICS	19P000273	FS	SL5 - LOREM IPSUM DOLOR SIT AM HINDER A			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		9		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000274	FS	SL5 - LOREM IPSUM DOLOR SIT AM ATHLETIC			9/12/2018	Project Intake	Next Project Phase						Lorem ipsum dolor sit amet,		15		JOHNATHAN JEH	
ATHLETICS	19P000275	FS	SL5 - LOREM IPSUM DOLOR SIT AM CHUNG H			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		6		JOHNATHAN JEH	
ATHLETICS	19P000276	FS	SL5 - LOREM IPSUM DOLOR SIT AM PHYSICS			9/12/2018	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,		16		JOHNATHAN JEH	
ATHLETICS	19P000277	FS	SL5 - LOREM IPSUM DOLOR SIT AM SCHOOL I			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		10		JOHNATHAN JEH	
ATHLETICS	19P000285	FS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		12		JOHNATHAN JEH Paul Ditty	
ATHLETICS	19S004271	FS	SL5 - LOREM IPSUM DOLOR SIT AM FAWCETT			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		8		JOHNATHAN JEH	
ATHLETICS	19W004374	FS	SL3 - LOREM IPSUM DOLOR SIT AM PARKING			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		7		JOHNATHAN JEH	
ATHLETICS	18P000346	FS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			3/18/2018	Quality Check of Work	Next Project Phase						Lorem ipsum dolor sit amet,				JOHNATHAN JEH Dan Lerman	
ATHLETICS	18P000484	FS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			6/26/2018	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,				JOSEPH ERBLAN Dan Lerman	
ATHLETICS	3407	PD&C	Lorem ipsum dolor sit amet, conset	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, conset	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, conset	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, conset	HINDER A	4000	4/10/2014	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,		3		Joe Erbland Miha Gavan	
BAS	18P000106	FS	SL5 - LOREM IPSUM DOLOR SIT AM PHYSICS		100	9/14/2017	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,				EDWIN MELGAR ENRICO BAEZ - MB	
BAS	18P000295	FS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			3/26/2018	In Progress	Next Project Phase						Lorem ipsum dolor sit amet,		13		BRCA HENDERS Paul Ditty	
BAS	18P000369	FS	SL5 - 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	18P000483	FS	SL5 - LOREM IPSUM DOLOR SIT AM SANNOCI			6/26/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,		7		AMANDA GREY ENRICO BAEZ	

Revised, Unified, Searchable, Reporting (Output)



Organization	NO.	Project Service Unit	Project	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
8	ATHLETICS 3432	PD&C	Athlet						Lorem ipsum dolor sit amet,	3			JOSEPH ERBLAN	
9	ATHLETICS 2696	PD&C	Socce						Lorem ipsum dolor sit amet,	1			JOHNATHAN JEH Paul Ditty	
10	ATHLETICS 3408	PD&C	Harris						Lorem ipsum dolor sit amet,	2			JOHNATHAN JEH Paul Ditty	
11	ATHLETICS 3407	PD&C	Athlet						Lorem ipsum dolor sit amet,	4			JOHNATHAN JEH Paul Ditty	
12	ATHLETICS 19P000274	FS	SL5-R						Lorem ipsum dolor sit amet,	14			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	11			JOHNATHAN JEH Paul Ditty	
									Lorem ipsum dolor sit amet,	13			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	9			JOHNATHAN JEH Paul Ditty	
									Lorem ipsum dolor sit amet,	15			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	6			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	16			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	10			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	12			JOHNATHAN JEH Paul Ditty	
									Lorem ipsum dolor sit amet,	8			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,	7			JOHNATHAN JEH	
									Lorem ipsum dolor sit amet,				JOHNATHAN JEH Dan Lerman	
									Lorem ipsum dolor sit amet,	2			JOHNATHAN JEH Dan Lerman	
									Lorem ipsum dolor sit amet,	99			Joseph Erbland Fernando Nunez	
									Lorem ipsum dolor sit amet,	1			Joseph Erbland Scott Donnell	
									Lorem ipsum dolor sit amet,	3			Joe Erbland Miha Gavan	
									Lorem ipsum dolor sit amet,				EDWIN MELGAR Enrico Baez - Mb	
									Lorem ipsum dolor sit amet,	13			ERICA HENDERS Paul Ditty	
									Lorem ipsum dolor sit amet,				KAREN JANIGA Dan Lerman	
									Lorem ipsum dolor sit amet,	7			AMANDA GREY Enrico Baez	

Revised, Unified, Searchable, Reporting (Output)

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

Updated 10/17/18

Small Project Integrated Summary Report

Organization

GSOE

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ATHLETICS	19P000252	PS	SL5 - 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	PS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	1			JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000266	PS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			9/11/2018	Hold - Facilities Services	Next Project Phase						Lorem ipsum dolor sit amet,	2			JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000268	PS	SL5 - LOREM IPSUM DOLOR SIT AM UNIV OFF			9/11/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	4			JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000270	PS	SL5 - LOREM IPSUM DOLOR SIT AM ATHLETIC	78		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	14			JOHNATHAN JEH	
ATHLETICS	19P000271	PS	SL5 - LOREM IPSUM DOLOR SIT AM BOYCE HU	3		9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	11			JOHNATHAN JEH Paul Ditty	
ATHLETICS	19P000272	PS	SL5 - LOREM IPSUM DOLOR SIT AM HEALTH S			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	13			JOHNATHAN JEH	
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ATHLETICS	19P000276	PS	SL5 - LOREM IPSUM DOLOR SIT AM PHYSICS			9/12/2018	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,	16			JOHNATHAN JEH	
ATHLETICS	19P000277	PS	SL5 - LOREM IPSUM DOLOR SIT AM SCHOOL I			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	10			JOHNATHAN JEH	
ATHLETICS	19P000285	PS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	12			JOHNATHAN JEH Paul Ditty	
ATHLETICS	19S004271	PS	SL5 - LOREM IPSUM DOLOR SIT AM FAWCETT			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	8			JOHNATHAN JEH	
ATHLETICS	19W004374	PS	SL3 - LOREM IPSUM DOLOR SIT AM PARKING			9/12/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	7			JOHNATHAN JEH	
ATHLETICS	18P000346	PS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			3/18/2018	Quality Check of Work	Next Project Phase						Lorem ipsum dolor sit amet,				JOHNATHAN JEH Dan Lerman	
ATHLETICS	18P000484	PS	SL5 - LOREM IPSUM DOLOR SIT AM BOU RNS			6/26/2018	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,				JOSEPH ERBLAN Dan Lerman	
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ATHLETICS	3408	PD&C	Lorem ipsum dolor sit amet, conseq H INDER A		4000	1/23/2018	Lorem ipsum dolor sit amet, con	Next Project Phase						Lorem ipsum dolor sit amet,	99			Joseph Erbland Fernando Nunez	
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BAS	18P000106	PS	SL5 - LOREM IPSUM DOLOR SIT AM PHYSICS		100	9/14/2017	Google RT	Next Project Phase						Lorem ipsum dolor sit amet,				EDWIN MELGAR Enrico Baez - Mb	
BAS	18P000265	PS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN			3/29/2018	In Progress	Next Project Phase						Lorem ipsum dolor sit amet,				BRCA HENDERS Paul Ditty	
BAS	18P000369	PS	SL5 - LOREM IPSUM DOLOR SIT AM CHASS IN		1407	3/27/2018	Plan Development / Check	Next Project Phase						Lorem ipsum dolor sit amet,	13			KAREN JANIGA Dan Lerman	
BAS	18P000483	PS	SL5 - LOREM IPSUM DOLOR SIT AM SANNOCI			6/26/2018	Queue to Start	Next Project Phase						Lorem ipsum dolor sit amet,	7			AMANDA GREY Enrico Baez	

Revised, Unified, Searchable, Reporting (Output)

'Project Status Snapshot'

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

Project Status Report
 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Last Updated: 10/31/23

Project Information
 Project Reference No: 18P000213
 Take this more detailed information for a specific project. Year to the Project Reference No. at class the end and then scroll through the document for more.

Project Manager Dan Lerman
 Organization: FAC-PLNG-DESIGN-CONST HINDERAKER
 Organization Leader: Gerry Bometti

Contact FRANK PORTER
 Building: HINDERAKER
 Priority/Designate: John White

Request Date 12/7/17
 Request Date: 12/7/17
 Project Service Unit: FS

Project Description
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Project Status
 Project Status: Hold - customer Equipment / Schedule
 Next Steps: Next Project Phase

Campus Impact (i.e. excessive noise / limited access / utility shutdown)
 Description: [Blank]
 From: [Blank] To: [Blank]

PM Notes
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

BZM Scope
 Scope Completed: [Blank]

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!

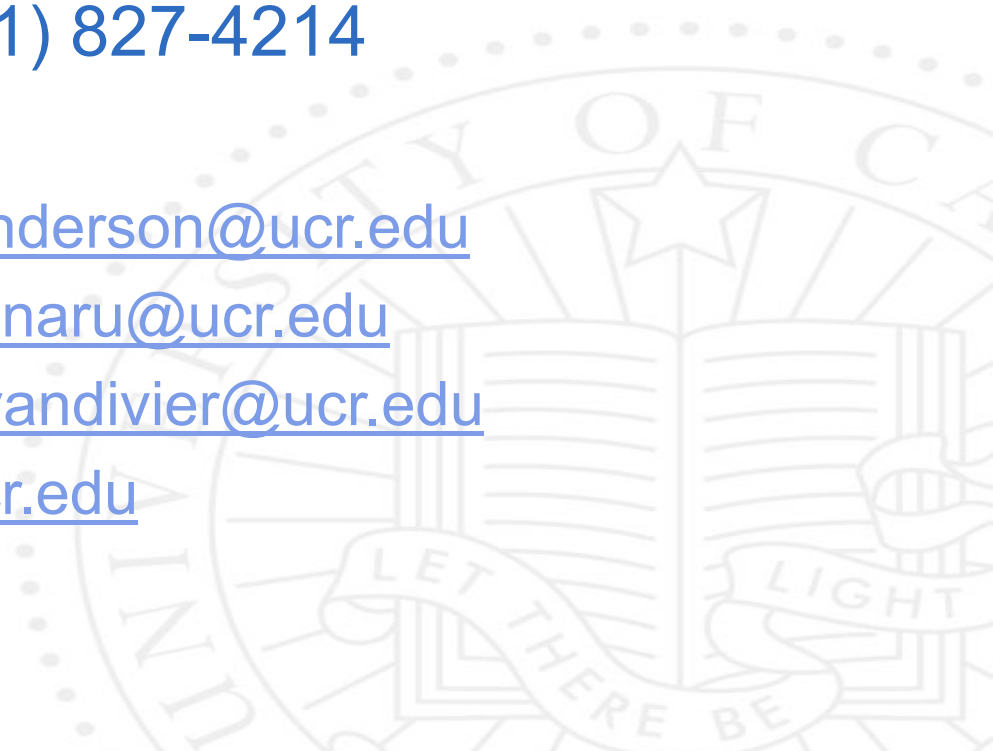
Facilities@ucr.edu (951) 827-4214

Monty Anderson – monty.anderson@ucr.edu

Linda Bejenaru – linda.bejenaru@ucr.edu

Loretta Vandivier – loretta.vandivier@ucr.edu

Alan Siero – alan.siero@ucr.edu



R'Projects

Today's Lunch & Learn

UC RIVERSIDE | R'Projects | UCR PROJECT PORTAL

ORGANIZATION OVERVIEW | PROJECT RESOURCES | CONTACT INFORMATION | PROJECT STATUS | PAGES

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Submit a Project Request

To submit your project idea or request, follow the steps below:

1. Click the link below to submit your project idea or request.
2. Select "Maintenance repair" and "OK".
3. Complete form with your project details (add "project" in the request title).

The link below is to the Facilities Services ticketing system. All submissions may be made here we will distribute to the appropriate departments.

[SUBMIT PROJECT REQUEST](#)

Integrated Project Status Report

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[VIEW THE REPORT](#)

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Facilities Services

Services Requests

Submit a Work Order

Request for Maintenance Repairs

Facilities Website (Trouble Ticket or Service Request)

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Capital Programs Management System

Home

CPMS Background

CPMS (Org Approver)

FAMIS Work Order System

Input to FAMIS by FS

R'Space (authorized users only)

UNIVERSITY OF CALIFORNIA, RIVERSIDE

Facilities Work Order System

Request for Maintenance Repairs

Please Select an Accountability Structure: **OV153 Physical Plant**

CONTACT INFORMATION

Primary Contact: **ROBERT ANDERSON** (Phone: 951-827-5888, Email: rander@ucr.edu, Department: BUILDING SERVICES)

Alternate Contact: _____

FAU INFORMATION

Account	Activity	Fund	Function	Cost Center	Proj Code	Parent ID
2	2	2	2	2	2	2

LOCATION OF WORK:

Site: **UCR Main Campus** | Building: **HERMANTHES SOCSCI** | Floor: **Second Floor** | Room: **2009**

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