

Online Capital Project Request Form

6/20/17

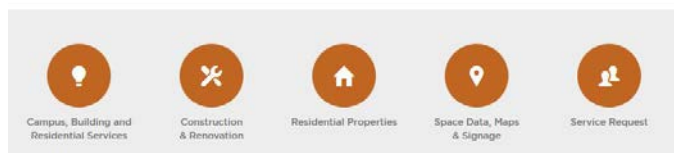
Application Help – FOR SUBMITTERS –

Accessing the website:

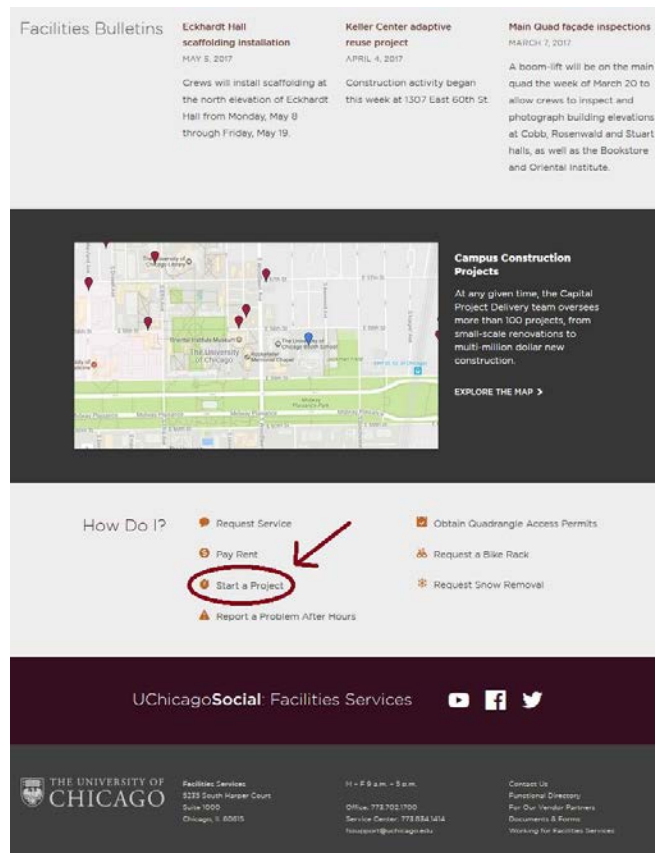
Utilizing the Firefox browser, go to the Facilities Services website (<http://facilities.uchicago.edu/>), and



Facilities Services supports the mission of the University of Chicago through efforts to maintain and enhance the University campus and environment and provide superior client service to our community including faculty, students, staff, neighbors and visitors. About Us >

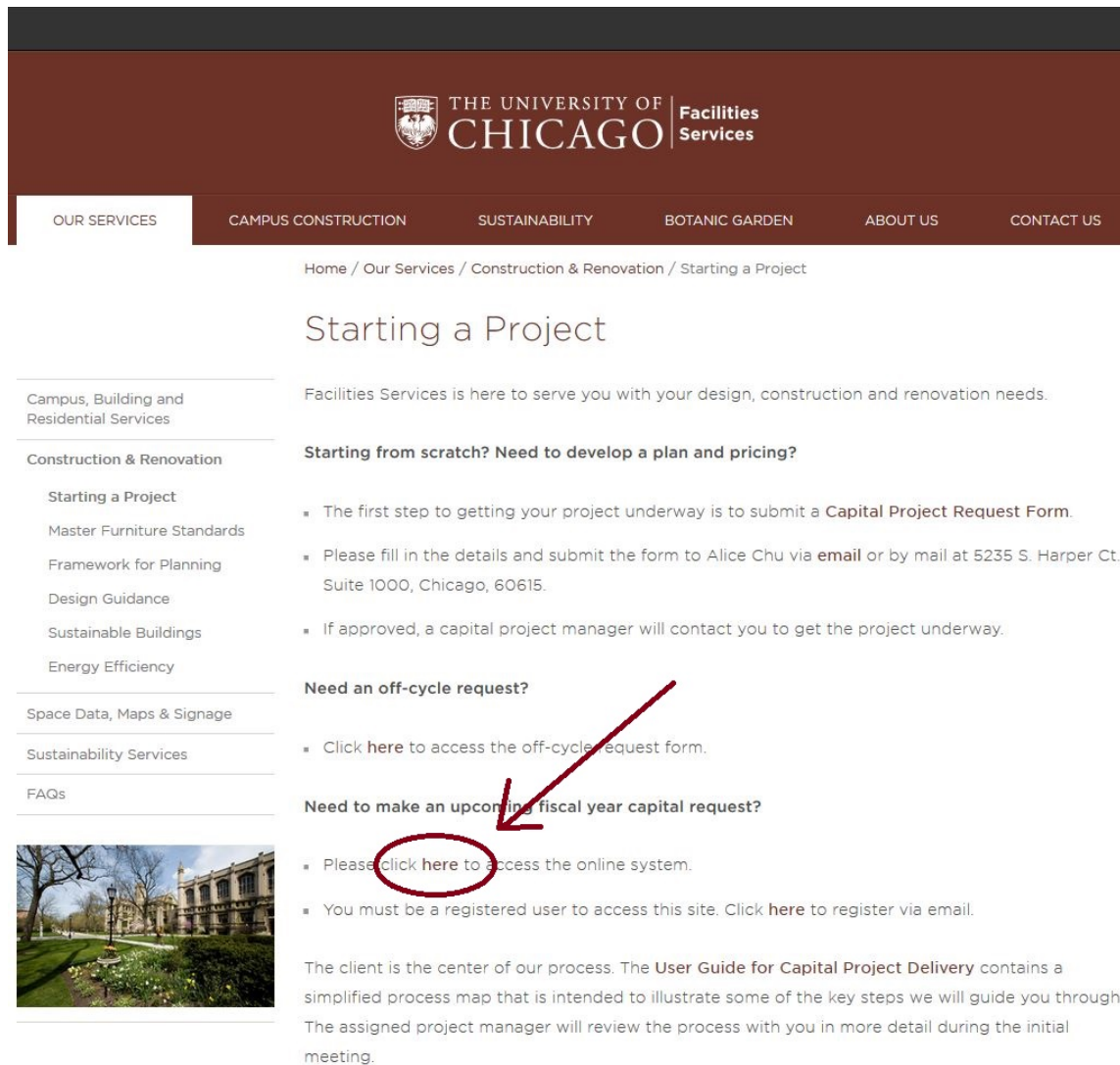


Scroll to the bottom of the page and click on the “**Start a Project**” link.



OR Go to <http://facilities.uchicago.edu/services/construction/starting-project/>, and

Pan down to the section labeled, “**Need to make an upcoming fiscal year capital request?**”, and Click the [link](#) to access the online system.



The screenshot shows the University of Chicago Facilities Services website. The header includes the university logo and navigation links. The main content area is titled 'Starting a Project' and provides information about capital project requests. A red arrow points to the section 'Need to make an upcoming fiscal year capital request?', and a red circle highlights the word 'here' in the instruction 'Please click here to access the online system.'

Home / Our Services / Construction & Renovation / Starting a Project

Starting a Project

Facilities Services is here to serve you with your design, construction and renovation needs.

Starting from scratch? Need to develop a plan and pricing?

- The first step to getting your project underway is to submit a **Capital Project Request Form**.
- Please fill in the details and submit the form to Alice Chu via **email** or by mail at 5235 S. Harper Ct., Suite 1000, Chicago, 60615.
- If approved, a capital project manager will contact you to get the project underway.

Need an off-cycle request?

- Click [here](#) to access the off-cycle request form.

Need to make an upcoming fiscal year capital request?

- Please click [here](#) to access the online system.
- You must be a registered user to access this site. Click [here](#) to register via email.

The client is the center of our process. The User Guide for Capital Project Delivery contains a simplified process map that is intended to illustrate some of the key steps we will guide you through. The assigned project manager will review the process with you in more detail during the initial meeting.

Login by inputting your CNetID (**in lower case only**) and then your password.



The screenshot shows the 'Capital Project Requests' login page. It features a 'Please Login' form with fields for Username and Password, and a Login button. The form is circled in black.

THE UNIVERSITY OF CHICAGO
Office Of The Provost

Facilities Services
Building and Renovation Excellence
PRD Version 1.2

Capital Project Requests

Please Login

Username:

Password:

Login

© The University Of Chicago 2016. - For questions, and support regarding this Web site, please send emails to fsupport@lists.uchicago.edu.

If you do not have access, please email fcapitalrequests@lists.uchicago.edu to become a registered user.

Capital Request Submittal Process Overview –

Step 1: Create a Capital Project Request

Step 2: Update your Capital Project Request

Step 3: Upload Documents in support of your Capital Project Request

Step 4: Formally Submit a Capital Project Request

Step 5: Reviewers will check your SUBMITTED Request

Step 6: Edit an INCOMPLETE submittal

*** How to Review/ Print a Project Request**

Step 1: Create a Capital Project Request

- Start by selecting “Create Project Request”.

- Answer as many questions as possible within the sections provided. If needed, see [List of Capital Request Questions](#).

Note: the questions with a **red asterisk *** will need to be answered in order to save (create) the form.

- Once completed, click the “Create” button on the left, lower most corner of the page.

This will save a draft version of your request and take you to the “Show Request” screen.

Step 2: Update your Capital Project Request

- Select the “Edit” button at the top or bottom of the page,

The screenshot shows the 'Capital Project Requests' page for the University of Chicago. At the top, there is a red header with the university logo and the text 'Office Of The Provost' and 'Capital Project Requests'. Below the header, a navigation bar contains links: Home, Search Request List, New Request, Edit (highlighted with a black arrow), Back, and Back to list after updating this record. The main content area displays details for 'Request 608 created'. The details are as follows:

Capital Project Request Number.:	2017608
Capital Project Request TransID.:	608
1. Project Name:	Roof Drain Disconnects
2. Project Description:	Remove roof drain downspouts
3. Project Type:	Exterior Upgrade
4. Original Request:	NO
5. Repeat Req:	YES
6. Fiscal Year:	2020
7. Contact Person:	Barry O'Quinn
8. Contact Phone:	312-456-7854
9. Contact Email:	barry@uchicago.edu
10. Unit Operating Budget:	NO
11. University Surplus:	NO
12. Gift/ Endowment:	NO
13. University Funded:	YES
14. Cost Estimate:	\$3,000,000.00
15. Development:	NO
16. Cost Sharing:	NO
17. Relative Priority: Only Request:	NO
20. Creation Date:	2017-05-15 09:38:03 CDT

- Update the form as needed, and then click the “Update” button at the bottom of the page,

The screenshot shows the 'CRITERIA CHECKLIST' form. It contains 57 questions with dropdown menus for 'YES', 'NO', or 'NO' (for question 40). A black arrow points to the 'Update' button at the bottom of the form. Below the questions, there is a red warning message: 'Please check the box below after checking that the required fields are filled in, then click on the "Submit" button.' and a checkbox labeled 'I acknowledge the form is complete.'.

CRITERIA CHECKLIST Please Answer The Following Questions:

39. Does the project correct Life/Safety concerns?	NO	40. If so have citations been issued?	NO
41. Does the project address environmental or code violations?	YES	42. If so have citations been issued?	YES
43. Does the project address accessibility issues?	YES	44. If so have citations been issued?	NO
45. If deficiency is not corrected will the use of the facility be adversely affected?	NO		
46. Are the components of this project beyond effective repair?	NO		
47. Was the project included in last year's Capital Project list, but not funded?	NO		
48. Is project related to a Presidential Initiative?	NO		
49. If deficiency is not corrected will it cause significant damage to the facility or its contents?	NO		
50. Is this project a sequential phase of a multi-phased, schedule-critical, project?	NO	51. If so please indicate which project(s) in comments: -->	
52. Will this project significantly reduce O&M costs?	NO		
53. Will this project address significant client complaints?	YES		
54. Does project expand programming and/ or provide additional space (SFP)?	NO		
55. Will this project support sustainability objectives and/ or generate energy savings?	NO		
56. Is this a priority 1 or 2 project in the Facility Condition Assessment database?	NO		
57. Estimated square footage increase with implementation of this project. *	0		

*Please check the box below after checking that the required fields are filled in, then click on the "Submit" button.

I acknowledge the form is complete.

Update Submit Back

© The University Of Chicago 2016 - For questions, and support regarding this Web site, please send emails to fsupport@ts.uchicago.edu.

- Go to Step 3
- OR
- If not already in, login to the Capital Request website homepage.

- Select **“Find/ Edit a Project Request”**.

THE UNIVERSITY OF CHICAGO

Office Of The Provost Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Application Help

Capital Projects Request Form (CPR)

Please select from the list of actions below:

Available Actions:

- [Create Project Request](#)
- [Find /Edit a Project Request](#)

Links

[Office to the Provost](#)
[The University of Chicago](#)

© The University Of Chicago 2016. - For questions, and support regarding this Web site, please send emails to fsupport@lists.uchicago.edu.

- Click the **“Find Request”** button to show all Requests.

THE UNIVERSITY OF CHICAGO

Office Of The Provost Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Home New Request Back

Capital Project Request Filter Form

Search Fields For Capital Project Requests:

Project Number	Project Name	Building Name	Status:	Created By Name:	Request Date From:	Request Date To:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Fs Maximo	<input type="text"/>	<input type="text"/>

Find Requests

TransID	Project No.	Project Name	Status	Created Date	Bldname	PSC Group	Cost Estimate	Project Type
EXCEL								

© The University Of Chicago 2016. - For questions, and support regarding this Web site, please send emails to fsupport@lists.uchicago.edu.

Note: You can use column headers to sort as needed, use % sign for wildcard **OR**

Input a few letters into the search fields and click the **“Find Request”** button,

- Select your Request by clicking on the **“Project Number”**.

THE UNIVERSITY OF CHICAGO

Office Of The Provost Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Home New Request Back

Capital Project Request Filter Form

Search Fields For Capital Project Requests:


Project Number	Project Name	Building Name	Status:	Created By Name:	Request Date From:	Request Date To:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Fs Maximo	<input type="text"/>	<input type="text"/>

Find Requests

TransID	Project No.	Project Name	Status	Created Date	Bldname	PSC Group	Cost Estimate	Project Type
606	2017505	Roof Drain Disconnects	DRAFT	5/15/17 9:38 AM	Rockefeller Chapel	Capital AR	\$3,000,000	Exterior Upgrade
607	2017507	ghd	SUBMITTED	5/15/17 7:52 AM	Other	Major Projects	\$0	Feasibility/ Planning
606	2017506	fed	SUBMITTED	5/15/17 7:51 AM	UNKNOWN	Major Projects	\$0	Code or Infrastructure Deficiency
605	2017505	FY Electrical	SUBMITTED	5/15/17 7:48 AM	Multiple Buildings	Units	\$25,300,000	Equipment/ Systems
588	2017588	Large Attachments - 2017-05-12 V3	DRAFT	5/12/17 12:11 PM	Young Memorial Building	Major Projects	\$0	Equipment/ Systems
587	2017587	Large Attachments - 2017-05-12 V3	DRAFT	5/12/17 12:11 PM	Young Memorial Building	Major Projects	\$0	Equipment/ Systems
586	2017586	Test 2 - 2017-0512	REVIEWCOMPLETE	5/12/17 11:32 AM	Young Memorial Building	Campus Enhancements	\$0	Equipment/ Systems
585	2017585	Test 1 ok — Blah	REVIEWCOMPLETE	5/12/17 11:29 AM	Other	Capital AR	\$0	Code or Infrastructure Deficiency
566	2017566	Test 2-17-04-27 - DEV #2	REVIEWCOMPLETE	4/27/17 1:20 PM	Young Memorial Building	Campus Enhancements	\$0	Equipment/ Systems

This will take you to the **“Show Request”** screen.

- Click the “Edit” button at the top or bottom of the page.



THE UNIVERSITY OF
CHICAGO

Office Of The Provost
Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Home Search Request List New Request Edit Back Back to list after updating this record

Show Request

Request 608 created

Capital Project Request Number:	2017608
Capital Project Request TransID:	608
1. Project Name:	Roof Drain Disconnects
2. Project Description:	Remove roof drain downspouts
3. Project Type:	Exterior Upgrade
4. Original Request:	NO
5. Repeat Req:	YES
6. Fiscal Year:	2020
7. Contact Person:	Barry O'Quinn
8. Contact Phone:	312-456-7854
9. Contact Email:	barry@uchicago.edu
10. Unit Operating Budget:	NO
11. University Surplus:	NO
12. Gift/ Endowment:	NO
13. University Funded:	YES
14. Cost Estimate:	\$3,000,000.00
15. Development:	NO
16. Cost Sharing:	NO
17. Relative Priority: Only Request:	NO
20. Creation Date:	2017-05-15 09:38:03 CDT

- Update the form as needed, and then click the “Update” button at the bottom of the page.

CRITERIA CHECKLIST Please Answer The Following Questions:

39. Does the project correct Life/Safety concerns?	NO	40. If so have citations been issued?	NO
41. Does the project address environmental or code violations?	YES	42. If so have citations been issued?	YES
43. Does the project address accessibility issues?	YES	44. If so have citations been issued?	NO
45. If deficiency is not corrected will the use of the facility be adversely affected?	NO		
46. Are the components of this project beyond effective repair?	NO		
47. Was the project included in last year's Capital Project list, but not funded?	NO		
48. Is project related to a Presidential Initiative?	NO		
49. If deficiency is not corrected will it cause significant damage to the facility or its contents?	NO		
50. Is this project a sequential phase of a multi-phased, schedule-critical, project?	NO	51. If so please indicate which project(s) in comments. -->	
52. Will this project significantly reduce O&M costs?	NO		
53. Will this project address significant client complaints?	YES		
54. Does project expand programming and/ or provide additional space (SF)?	NO		
55. Will this project support sustainability objectives and/ or generate energy savings?	NO		
56. Is this a priority 1 or 2 project in the Facility Condition Assessment database?	NO		
57. Estimated square footage increase with implementation of this project. *	0		


Please check the box below after checking that the required fields are filled in, then click on the "Submit" button.

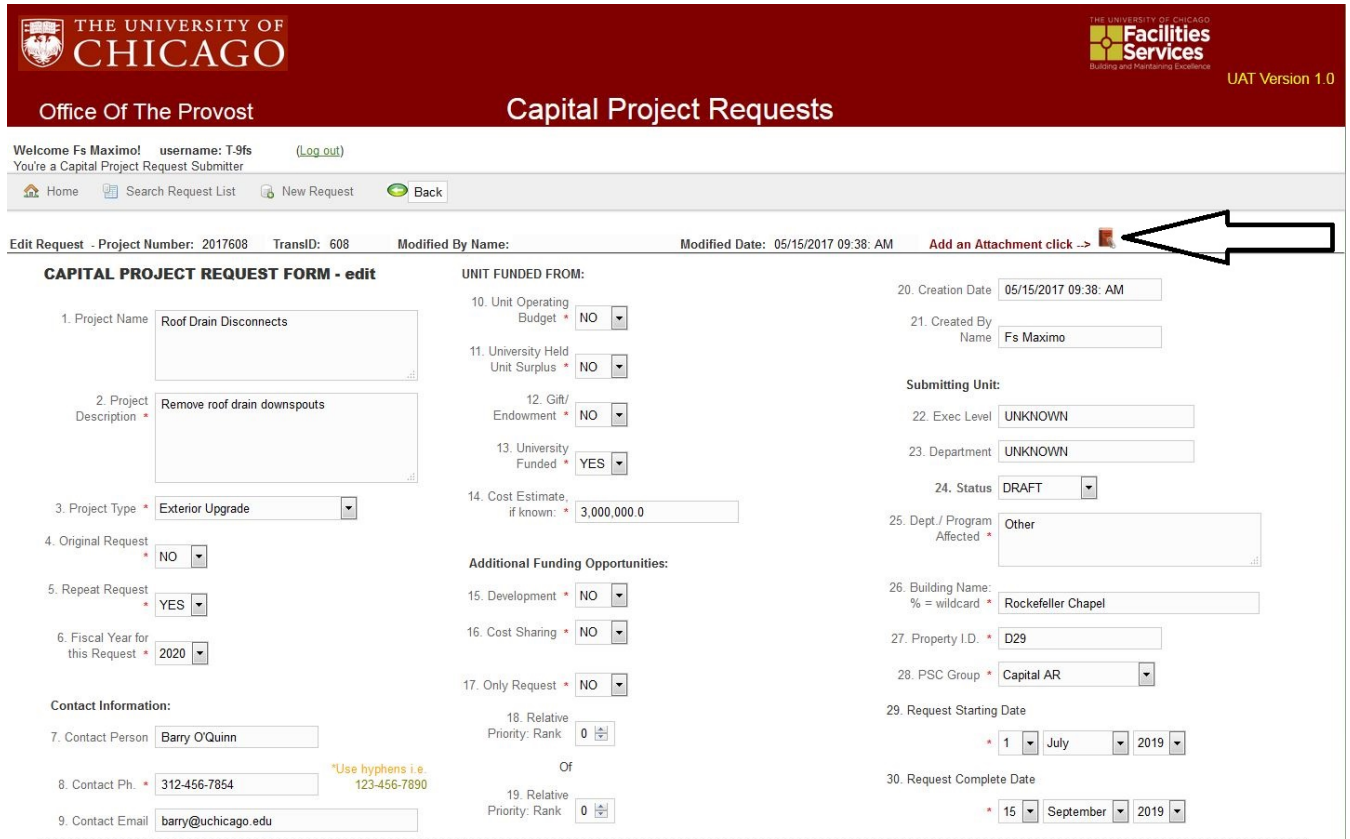
I acknowledge the form is complete

Update Submit Back

© The University Of Chicago 2016 - For questions, and support regarding this Web site, please send emails to faupport@fa.uchicago.edu

Step 3: Upload Documents in support of your Capital Project Request


- To upload documents, go to the top of the page and
Click on the icon to the right of “Add an Attachment click →” 



THE UNIVERSITY OF CHICAGO
Office Of The Provost
Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Home Search Request List New Request Back

Edit Request - Project Number: 2017608 TransID: 608 Modified By Name: Modified Date: 05/15/2017 09:38: AM Add an Attachment click → 

CAPITAL PROJECT REQUEST FORM - edit

1. Project Name: Roof Drain Disconnects

2. Project Description: Remove roof drain downspouts

3. Project Type: Exterior Upgrade

4. Original Request: NO

5. Repeat Request: YES

6. Fiscal Year for this Request: 2020

Contact Information:

7. Contact Person: Barry O'Quinn

8. Contact Ph.: 312-456-7854

9. Contact Email: barry@uchicago.edu

UNIT FUNDED FROM:

10. Unit Operating Budget: NO

11. University Held Unit Surplus: NO

12. Gift/Endowment: NO

13. University Funded: YES

14. Cost Estimate, if known: 3,000,000.0

Additional Funding Opportunities:

15. Development: NO

16. Cost Sharing: NO

17. Only Request: NO

18. Relative Priority: Rank: 0

19. Relative Priority: Rank: 0

20. Creation Date: 05/15/2017 09:38: AM

21. Created By Name: Fs Maximo

Submitting Unit:

22. Exec Level: UNKNOWN

23. Department: UNKNOWN

24. Status: DRAFT

25. Dept./ Program Affected: Other

26. Building Name: % = wildcard: Rockefeller Chapel

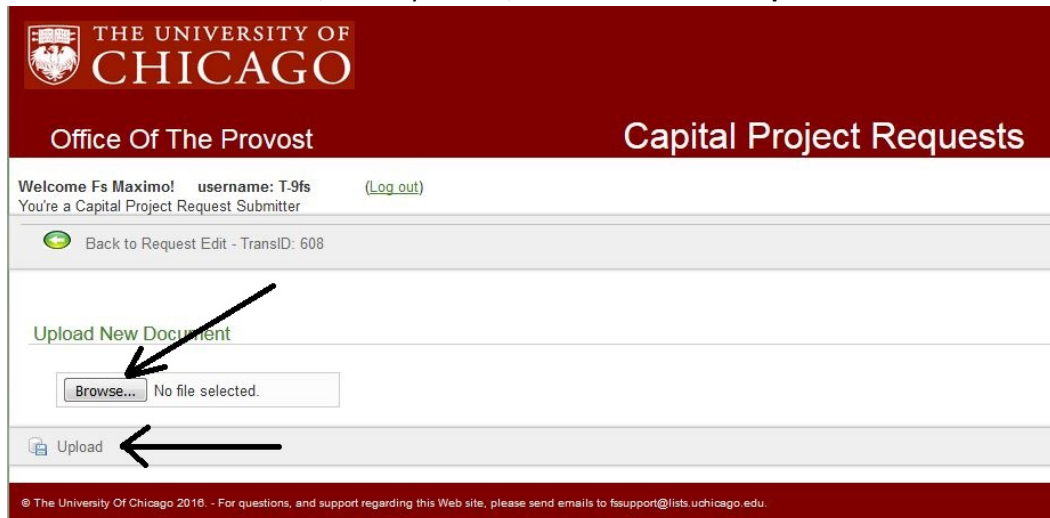
27. Property I.D.: D29

28. PSC Group: Capital AR

29. Request Starting Date: 1 July 2019

30. Request Complete Date: 15 September 2019

- Click the “Browse” button, select your file, and then click the “Upload” button.



THE UNIVERSITY OF CHICAGO
Office Of The Provost
Capital Project Requests

Welcome Fs Maximo! username: T-9fs (Log out)
You're a Capital Project Request Submitter

Back to Request Edit - TransID: 608

Upload New Document

Browse... No file selected.

Upload

© The University Of Chicago 2016. - For questions, and support regarding this Web site, please send emails to fsupport@lists.uchicago.edu.

This will save your request and take you to the “Document List” screen.

Step 4: Formally Submit a Capital Project Request

- Select the “Back to Request” button at the top left of the screen,

File Name	Upload Date	TransID
DOC110116-11012016110938.pdf	05-15-2017	608

OR

- If not already in, login to the Capital Request website and “Edit” your Request (Step 2).
- If you have answered all questions, and uploaded all necessary documents, go to the bottom of the page and check the “I acknowledge the form is complete” box, and then click “Submit”.

CRITERIA CHECK-LIST Please Answer The Following Questions:

39. Does the project correct Life/Safety concerns? NO

40. If so have citations been issued? NO

41. Does the project address environmental or code violations? NO

42. If so have citations been issued? NO

43. Does the project address accessibility issues? NO

44. If so have citations been issued? NO

45. If deficiency is not corrected will the use of the facility be adversely affected? NO

46. Are the components of this project beyond effective repair? NO

47. Was the project included in last year's Capital Project list, but not funded? NO

48. Is project related to a Presidential Initiative? NO

49. If deficiency is not corrected will it cause significant damage to the facility or its contents? NO

50. Is this project a sequential phase of a multi-phased, schedule-critical, project? NO

51. If so please indicate which project(s) in comments. --->

52. Will this project significantly reduce O&M costs? NO

53. Will this project address significant client complaints? NO

54. Does project expand programming and/ or provide additional space (SF)? NO

55. Will this project support sustainability objectives and/ or generate energy savings? NO

56. Is this a priority 1 or 2 project in the Facility Condition Assessment database? NO

57. Estimated square footage increase with implementation of this project. * 0

Please check the box below after checking that the required fields are filled in, then click on the "Submit" button.

I acknowledge the form is complete ☐

Update Submit Back

Note: if you have not completed all fields, you will get an error message requesting you to “go back and check the form, and fill in the required values”

- Once you have submitted your request, you will be taken to the “Show Request” screen.
- At this point, you can exit the webpage, complete a New Request, or return to the Project Request list.

Note: If you try to edit a submitted Request you will get an error message. See Steps 5 + 6.

Step 5: Reviewers will check your SUBMITTED Request and respond to you with either:

- An e-mail confirming receipt and completion,



OR

- An e-mail requesting revisions or additional information.

Step 6: Edit an INCOMPLETE submittal

- If your Request requires revisions or additional information, a Reviewer will mark it “**INCOMPLETE**”, and send you an email notifying you to re-submit.
- “**Edit**” your Request as needed (Step 2) and when complete,
- Proceed to re-“**Submit**” (Step 4).
- Repeat until request is formally submitted

Review/ Print a Project Request

- Select a project (Step 2) and go to its “Show Request” screen.
- To print the Request (in case an approval signature is required), utilize Firefox’s print function.
Note: Please format by scaling to 70%, and printing the background option
(this can be found within “Format & Options” in the Page Setup menu)
- To view a Request’s uploaded Documents or Attachments,
Click the icon  to the right of “**View Capital Project Request Document(s)**”.
- To view a history of the Request,
Click the icon  to the right of “**Status History**”.

Note:

Please see FY18 Capital Project Requests for level of information required, particularly “**Project Justification and Consequences of not funding**” and other questions regarding the criticality of the project or its potential to impact program.