Online Capital Project Request Form

7/2/18

Application Help **– FOR SUBMITTERS –**

Accessing the website:

Utilizing the Firefox browser, go to https://itsfit01.uchicago.edu/CAPREQPROC

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

If you do not have access, please email fycapitalrequests@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 7: Duplicate a previously submitted Capital Project Request

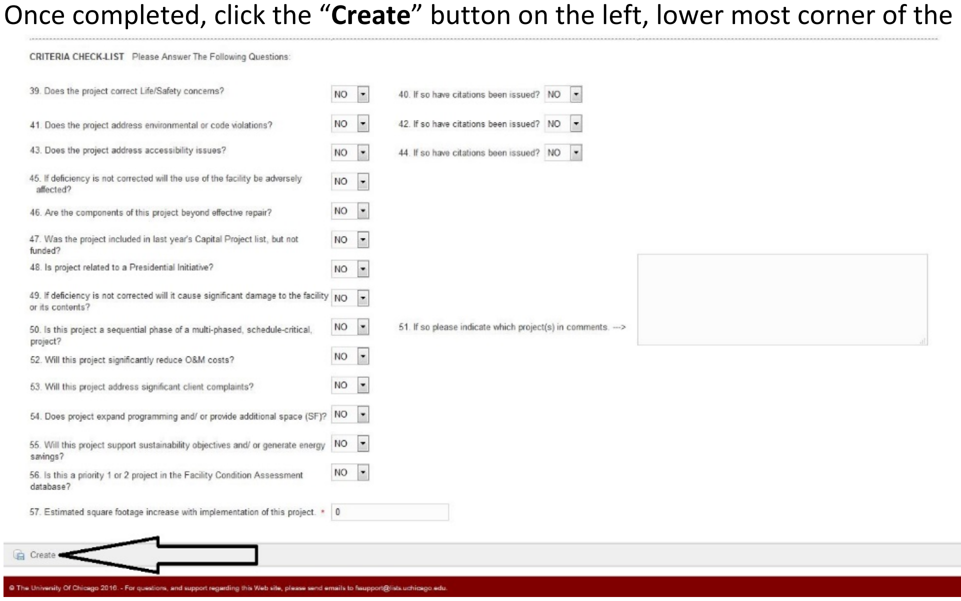
Step 1: Create a Capital Project Request

- Start by selecting "**Create Project Request**"

- Answer as many questions as possible within the sections provided.

  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.

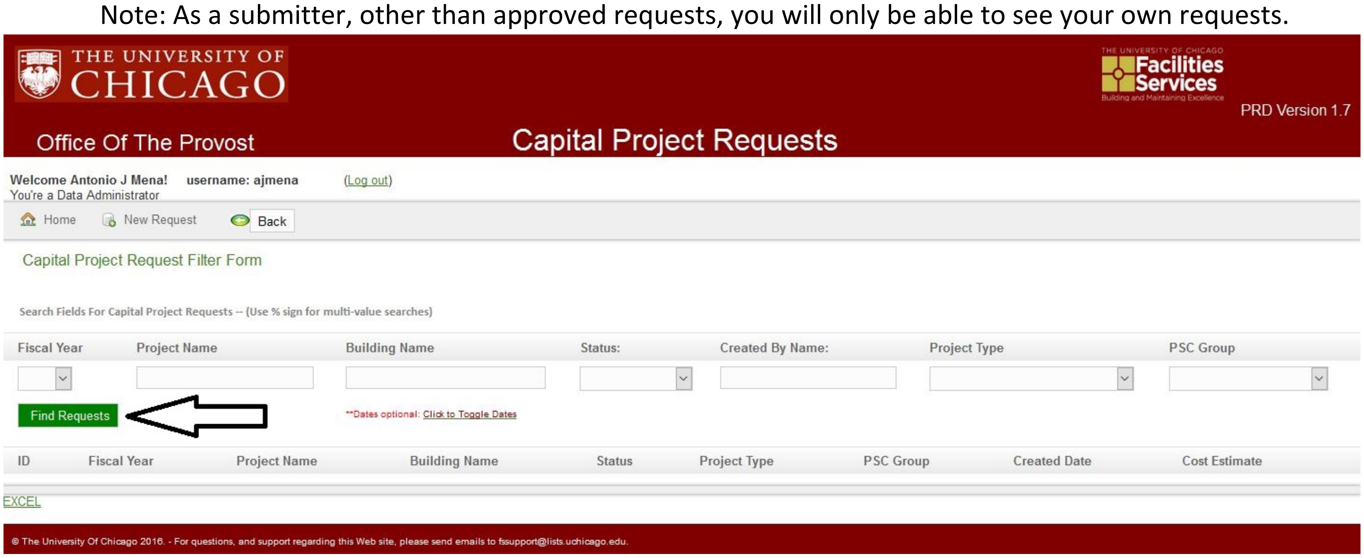
Step 2: Update your Capital Project Request

- If not already in, login to the Capital Request website homepage.

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

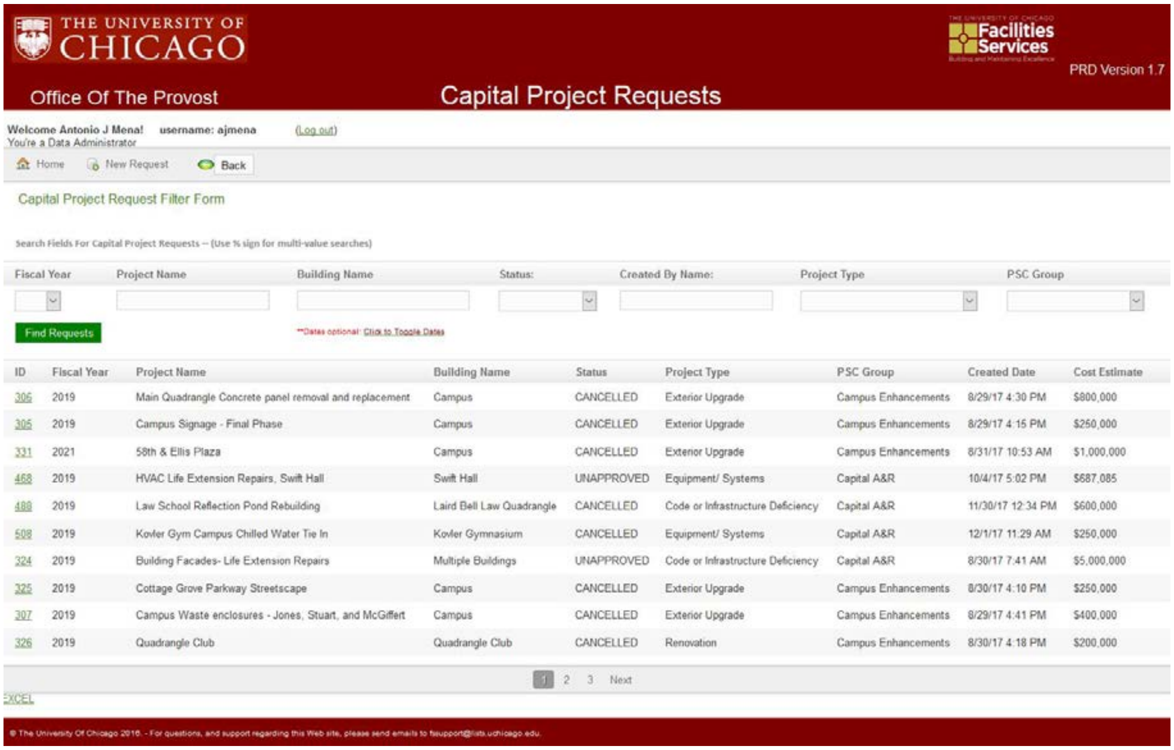
- Click the “**Find Request**” button to show all of your Requests.

  Note: As a submitter, other than approved requests, you will only be able to see your own requests.



Note: You can use column headers to sort as needed. Use % sign for multi-value searches ***OR***
Input a few letters into the search fields and click the “**Find Request**” button,

- Select your Request by clicking on the "**ID**".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Facilities Services

PRD Version 1.7

Office Of The Provost

Capital Project Requests

Welcome Antonio J Mena! username: ajmena (Log out)
You're a Data Administrator

Home New Request Back

Capital Project Request Filter Form

Search Fields For Capital Project Requests -- (Use % sign for multi-value searches)

Fiscal Year | Project Name | Building Name | Status: | Created By Name: | Project Type | PSC Group

Find Requests

**Dates optional: Click to Toggle Dates

ID	Fiscal Year	Project Name	Building Name	Status	Project Type	PSC Group	Created Date	Cost Estimate
306	2019	Main Quadrangle Concrete panel removal and replacement	Campus	CANCELLED	Exterior Upgrade	Campus Enhancements	8/29/17 4:30 PM	$800,000
305	2019	Campus Signage - Final Phase	Campus	CANCELLED	Exterior Upgrade	Campus Enhancements	8/29/17 4:15 PM	$250,000
331	2021	58th & Ellis Plaza	Campus	CANCELLED	Exterior Upgrade	Campus Enhancements	8/31/17 10:53 AM	$1,000,000
468	2019	HVAC Life Extension Repairs, Swift Hall	Swift Hall	UNAPPROVED	Equipment/ Systems	Capital A&R	10/4/17 5:02 PM	$687,085
488	2019	Law School Reflection Pond Rebuilding	Laird Bell Law Quadrangle	CANCELLED	Code or Infrastructure Deficiency	Capital A&R	11/30/17 12:34 PM	$600,000
508	2019	Kovler Gym Campus Chilled Water Tie In	Kovler Gymnasium	CANCELLED	Equipment/ Systems	Capital A&R	12/1/17 11:29 AM	$250,000
324	2019	Building Facades- Life Extension Repairs	Multiple Buildings	UNAPPROVED	Code or Infrastructure Deficiency	Capital A&R	8/30/17 7:41 AM	$5,000,000
325	2019	Cottage Grove Parkway Streetscape	Campus	CANCELLED	Exterior Upgrade	Campus Enhancements	8/30/17 4:10 PM	$250,000
307	2019	Campus Waste enclosures - Jones, Stuart, and McGiffert	Campus	CANCELLED	Exterior Upgrade	Campus Enhancements	8/29/17 4:41 PM	$400,000
326	2019	Quadrangle Club	Quadrangle Club	CANCELLED	Renovation	Campus Enhancements	8/30/17 4:18 PM	$200,000

1 2 3 Next

EXCEL

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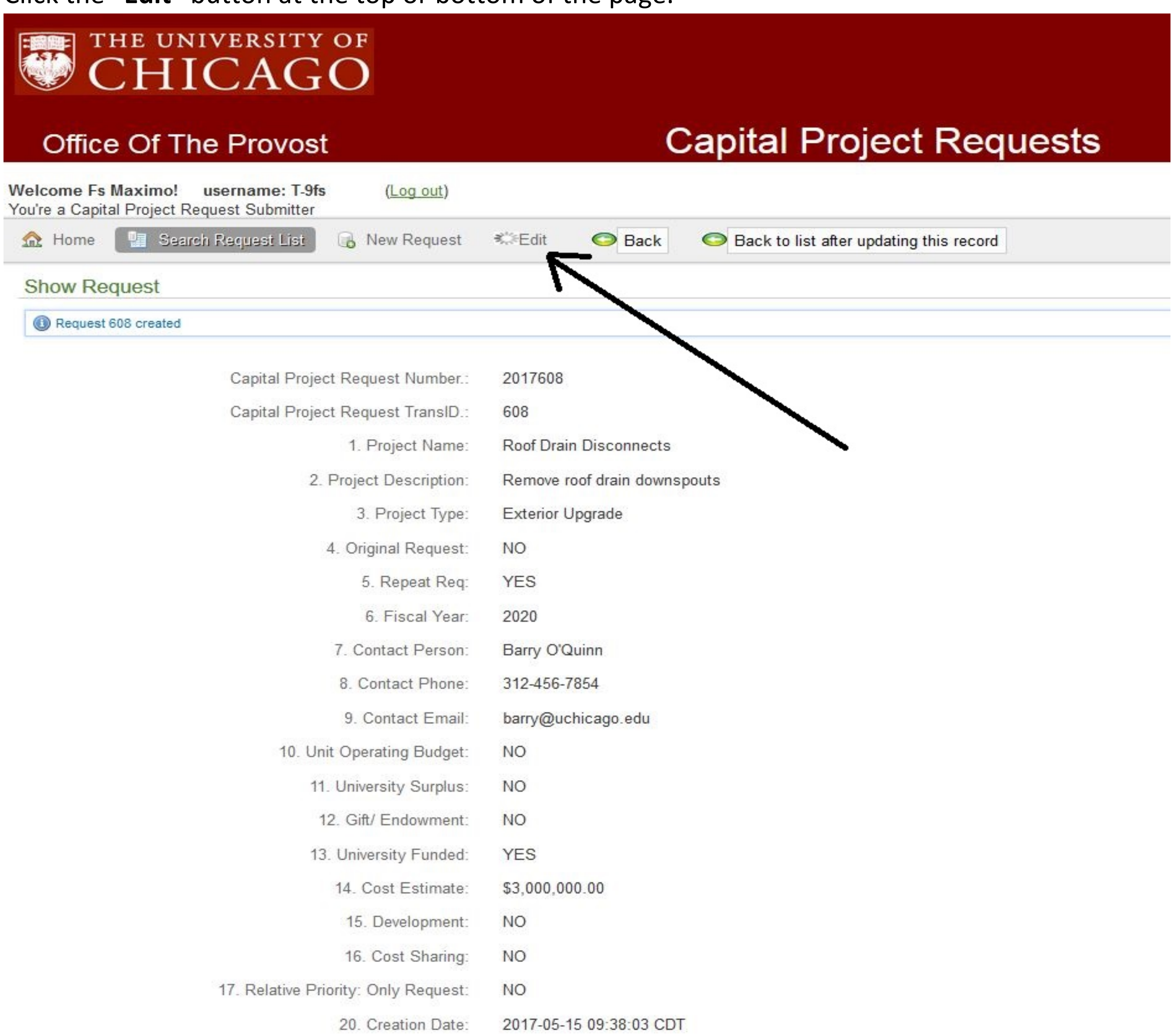
This will take you to the "Show Request" screen.

- Click the "**Edit**" button at the top or bottom of the page.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Office Of The Provost

Capital Project Requests

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

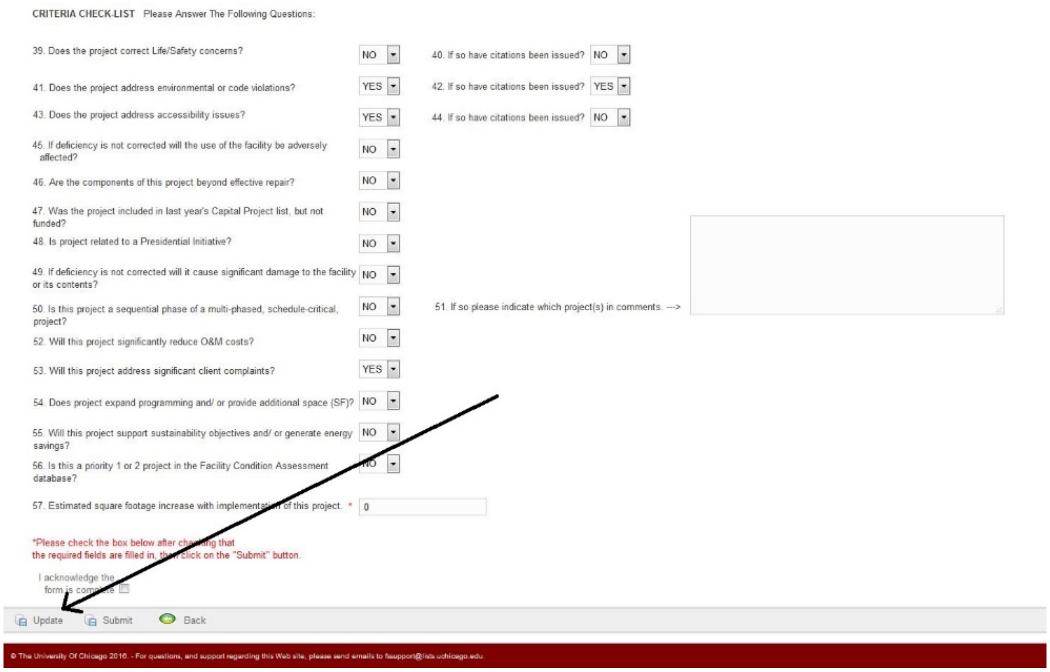
Home | Search Request List | New Request | Edit | Back | Back to list after updating this record

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 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? 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

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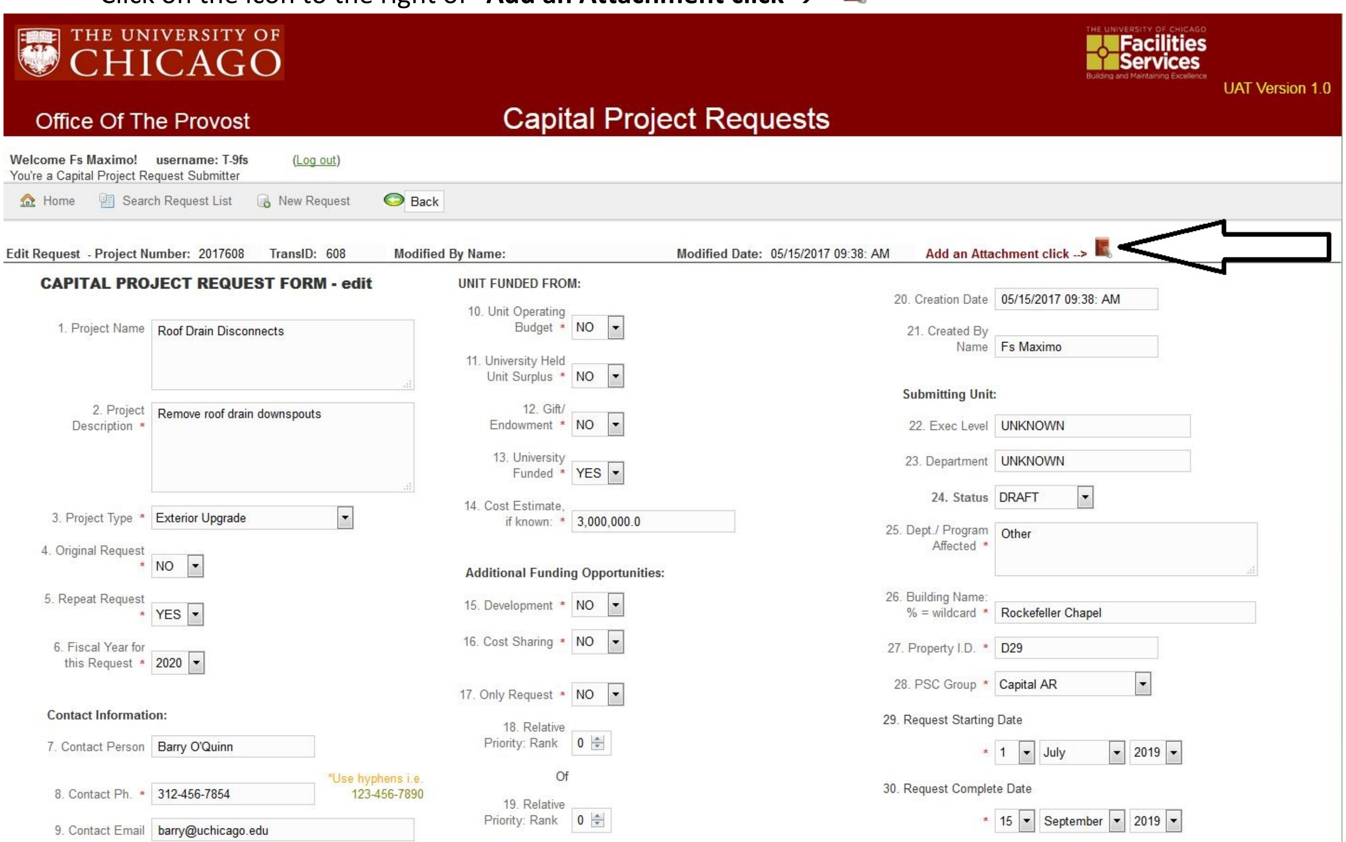
Step 3: Upload Documents in support of your Capital Project Request

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



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Office Of The Provost

Capital Project Requests

THE UNIVERSITY OF CHICAGO Facilities Services Building and Maintaining Excellence

UAT Version 1.0

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 *Use hyphens i.e. 123-456-7890
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:

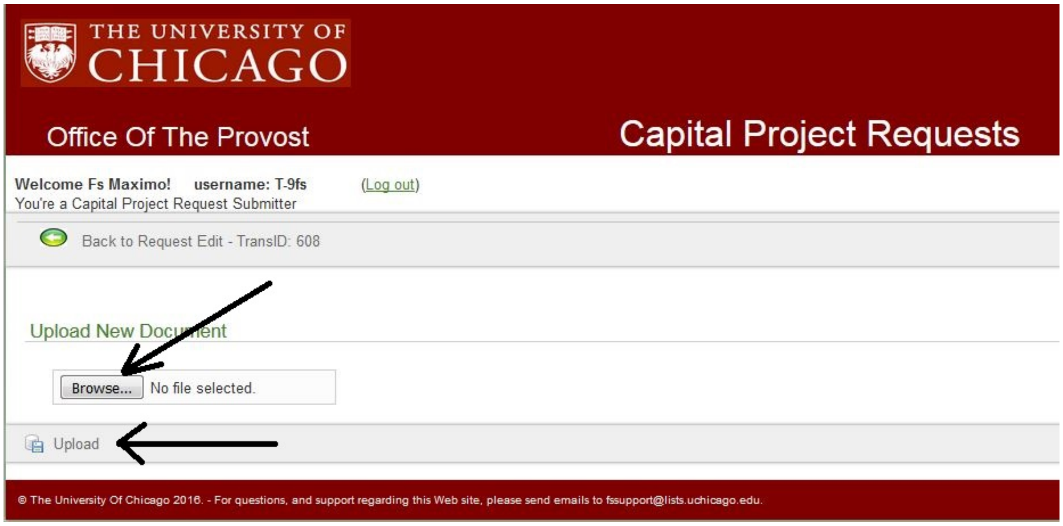
15. Development *: NO
16. Cost Sharing *: NO
17. Only Request *: NO
18. Relative Priority: Rank: 0
Of
19. Relative Priority: Rank: 0

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

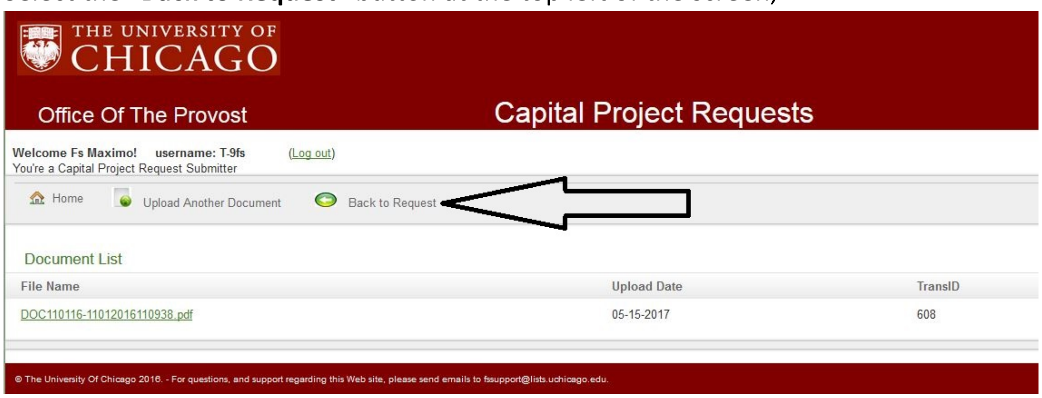
- Click the "**Browse**" button, select your file, and then click the "**Upload**" button.



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

Step 4: Formally Submit a Capital Project Request

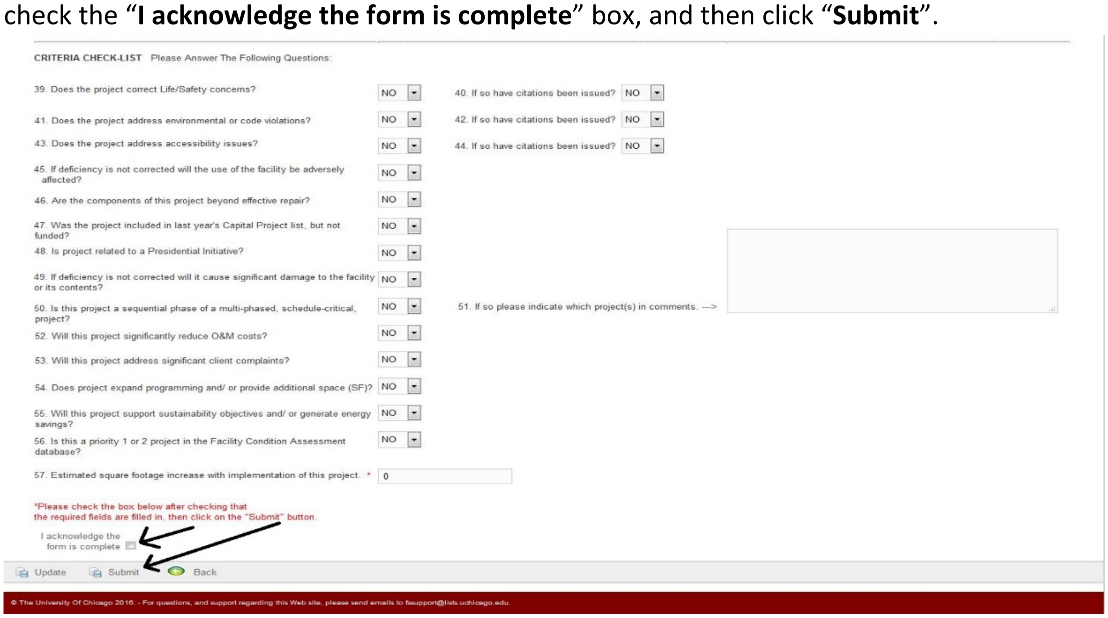
- Select the "**Back to Request**" button at the top left of the screen,



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**".



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/ 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, utilize Firefox's print function.

Note: Format to Landscape, Scale to 70%, and use the "Print Background" option (found within "Format & Options" in the Page Setup menu)

- To view an approved Request's uploaded Documents or Attachments,

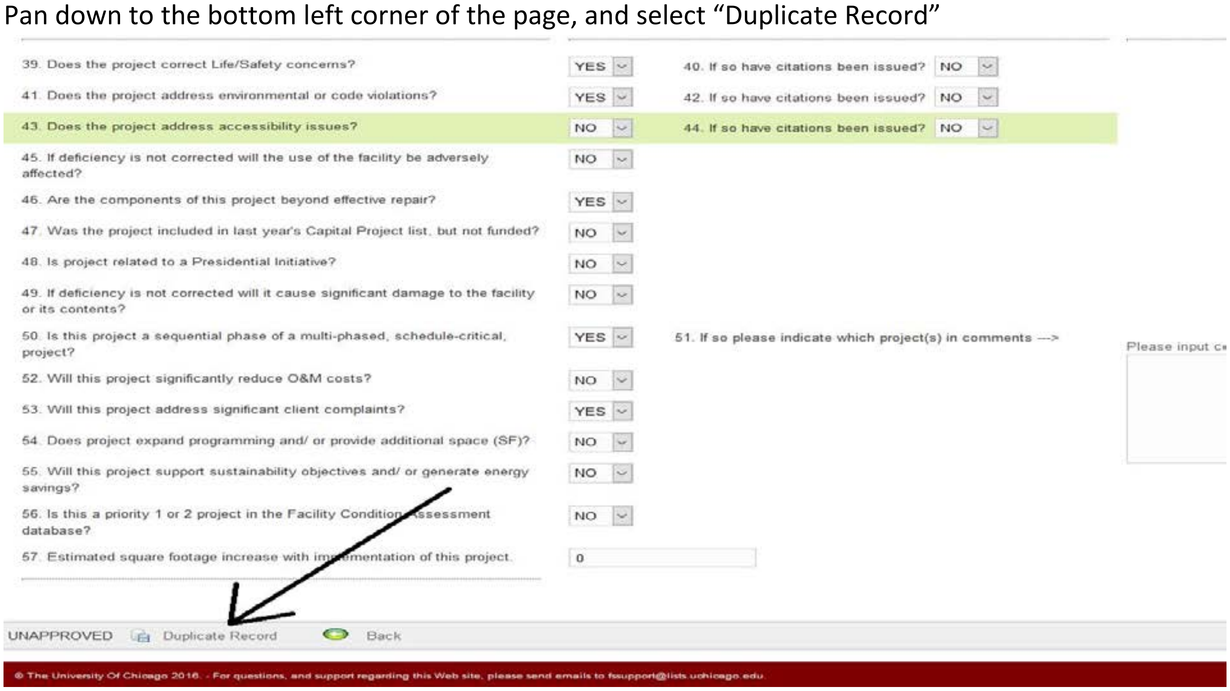
Click the icon to the right of "**View Capital Project Request Document(s)**".

- To view a history of an approved Request,

Click the icon to the right of "**Status History**".

Step 7: Duplicate a previously submitted Capital Project Request

- Select a project (Step 2) and go to its "Show Request" screen.
- Click the "**Edit**" button at the top or bottom of the page.
- Pan down to the bottom left corner of the page, and select "Duplicate Record"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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

UNAPPROVED Duplicate Record Back

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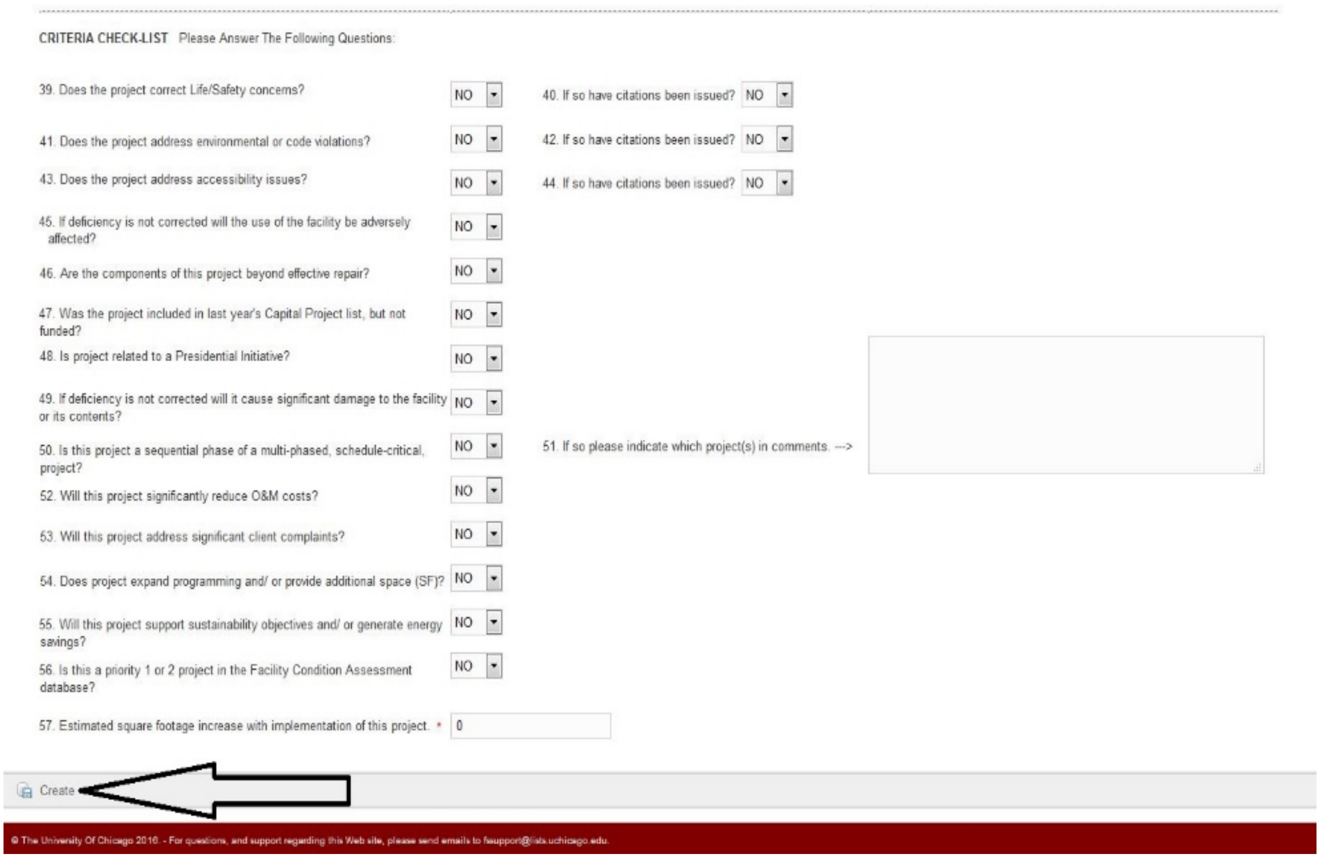
The site will auto-populate all of the fields with the same values as previously entered for the cap request, except for the Creation Date and all of the Criteria Check-List entries.

- Revise the capital project request as needed.
  Note: at minimum change the Fiscal Year for the Request, #6
- Once complete, select “Create” at the bottom left hand side of the page.



- Repeat steps 2-6 above as needed until formal submittal.