

2023 Business Conference

# **FACILITIES PLANNING & MANAGEMENT 101**



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# Overview

- What is Facilities Management?
- Requesting Service
- Work Orders vs. Projects
- Budget and Chargeback Billing
- Capital Projects
- Additional Resources



# What is Facilities Management?



# Facilities Planning & Management Services

- Facilities Management
  - Building Maintenance
  - Custodial Services
  - Heating and Air Conditioning
  - Landscape & Fleet Management
- Facilities Planning Design & Construction
  - Space Planning & Management
  - Renovations
  - Capital Projects & Construction



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# Facilities Planning & Management Services

## I'm not sure what I need?

- **Work Requests** are used to request maintenance services including lights out, cleaning needed, and to report other building issues.
- **Key Requests** are used to request building access and may include a key or electronic credentials.
- **Car Rental** can be reserved through Enterprise Car Rental and vehicles will be delivered to campus for use.
- **Space Requests** are used when trying to redefine space use on campus.

## Facilities Planning & Management Website

<https://www.csusb.edu/facilities-planning-management/services>

# HOW TO INPUT A REQUEST IN WEBTMA

Log into WebTMA through the Coyote Portal using your CoyoteID and Password. WebTMA is located under the “Administrative Systems” icon. Contact the Facilities Service Center at X75175 for **all emergencies that could either damage property or be considered unsafe to others.**

- When you log into WebTMA, the “CSUSB Request Form” should open in a new window.

**Requestor Information**

Request Date: 06/12/2019 13:45

Requestor Name: Polly Tech

Phone #: 909.537.3179

Requestor E-mail: tech@csusb.edu

Request Copy To:

Notify Me

**Action Requested**

**Request Information**

Request Type Desc: Web Request

Department Name: FM-Administration

Repair Center Name: Facilities Planning and Mg

Account #: 660061-SBCMP-SB001-D

Facility Name: Cal State San Bernardinc

Building Name:

Room/Area:

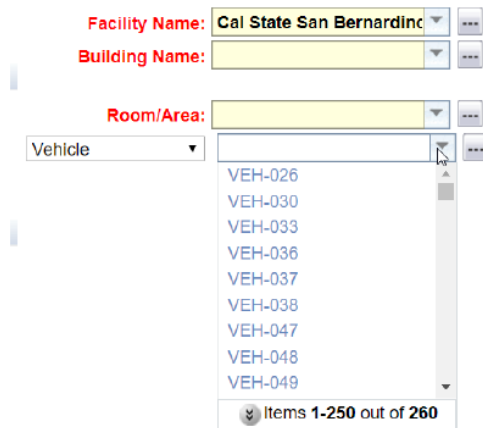
Vehicle:

- The following information auto-populates:
  - Requestor Name
  - Phone #
  - Requestor E-mail
  - Department Name
  - Account # associated with your Department
  - Facility Name: Cal State San Bernardino
    - If you are calling from PDC, then change Facility Name to “Palm Desert Campus”

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- If this request is for a vehicle, then input the vehicle # on the “Select Item” dropdown, the rest of the information will auto populate.




The screenshot shows a web form with the following fields:

- Facility Name:** A dropdown menu with "Cal State San BernardInc" selected.
- Building Name:** An empty dropdown menu.
- Room/Area:** An empty dropdown menu.
- Vehicle:** A dropdown menu with "Vehicle" selected, and a list of vehicle IDs: VEH-026, VEH-030, VEH-033, VEH-036, VEH-037, VEH-038, VEH-047, VEH-048, and VEH-049. A scroll bar is visible on the right side of the list.

At the bottom of the list, it says "Items 1-250 out of 260".

- Otherwise, select the Building Name of where the issue or request is occurring.
- Select the Area – Try to be specific and look at the floor plans online to confirm the correct room/area.

*Note there are options for ROOF, EXT DOOR, OUTSIDE and STAIR. Men’s Restrooms start with “MR”, Women’s Restrooms with “WR”, All Gender with “R” or “UR”, Corridor with “C”, Lobby with “L” and Vestibule with “V”*

- Input an Action Requested – Try to be as specific as possible.
- If you want a copy of correspondence to go to someone else besides you, input their email on the “Request Copy to” field.
- Click on the “Save” Button under the CSUSB Logo  Save .

# What's the difference between a Work Order & Project?

## Work Orders

- Routine Work
- Location Specific
- Trade Specific
- Maintenance of Existing Facility or Equipment

## Projects

- Involve multiple trades or phases
- Enhance space
- Re-assign or renovate space
- Involve multiple locations





# Budget & Chargeback Billing

## Why is my department being billed?

- Self-Support vs. Academic Departments
- Improvements vs. Maintenance
- Vehicle Maintenance
- Event Support
- Keys



# Capital Projects

- Budgeting and Approval
- Scheduling
- Design Phase and Plan Check
- Construction Phase



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# Where can we get more information?

Do you need more information?

Are you interested in a specific project or disruption on campus?

Do you need floorplans?

Want to find out how a particular space is assigned?

What about Sustainability?

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myCoyote Directory Library Maps Palm Desert Campus Make a Gift

## Facilities Planning & Management

Home Services Current Projects Forms & Documents Campus Disruptions Contractors

Facilities Planning & Management is here to provide, maintain, and enhance the campus community in support of the University's mission. Facilities Planning & Management consists of two divisions whose combined scope encompasses all aspects of Facilities at California State University, San Bernardino.

[Organizational Chart](#)

### Facilities Planning, Design & Construction

Facilities Planning, Design & Construction is a dedicated team of planning analysts, design professionals, construction project management and contract specialists who represent your interests. We will guide and assist you through all phases of your new building project or renovation. We will also coordinate the Architects, Contractors, and Consultants needed to complete your project. From initial planning and budgeting to occupancy, we will help you to meet your changing space needs.

[Public-Private Partnership](#) →

[Master Plan](#) →

[Tell Us How We Are Doing](#) →

[Frequently Asked Questions](#) →

### Contact Us

Facilities Planning & Management

<https://www.csusb.edu/facilities-planning-management>