

GLOBAL CRUISE QUICK GUIDE

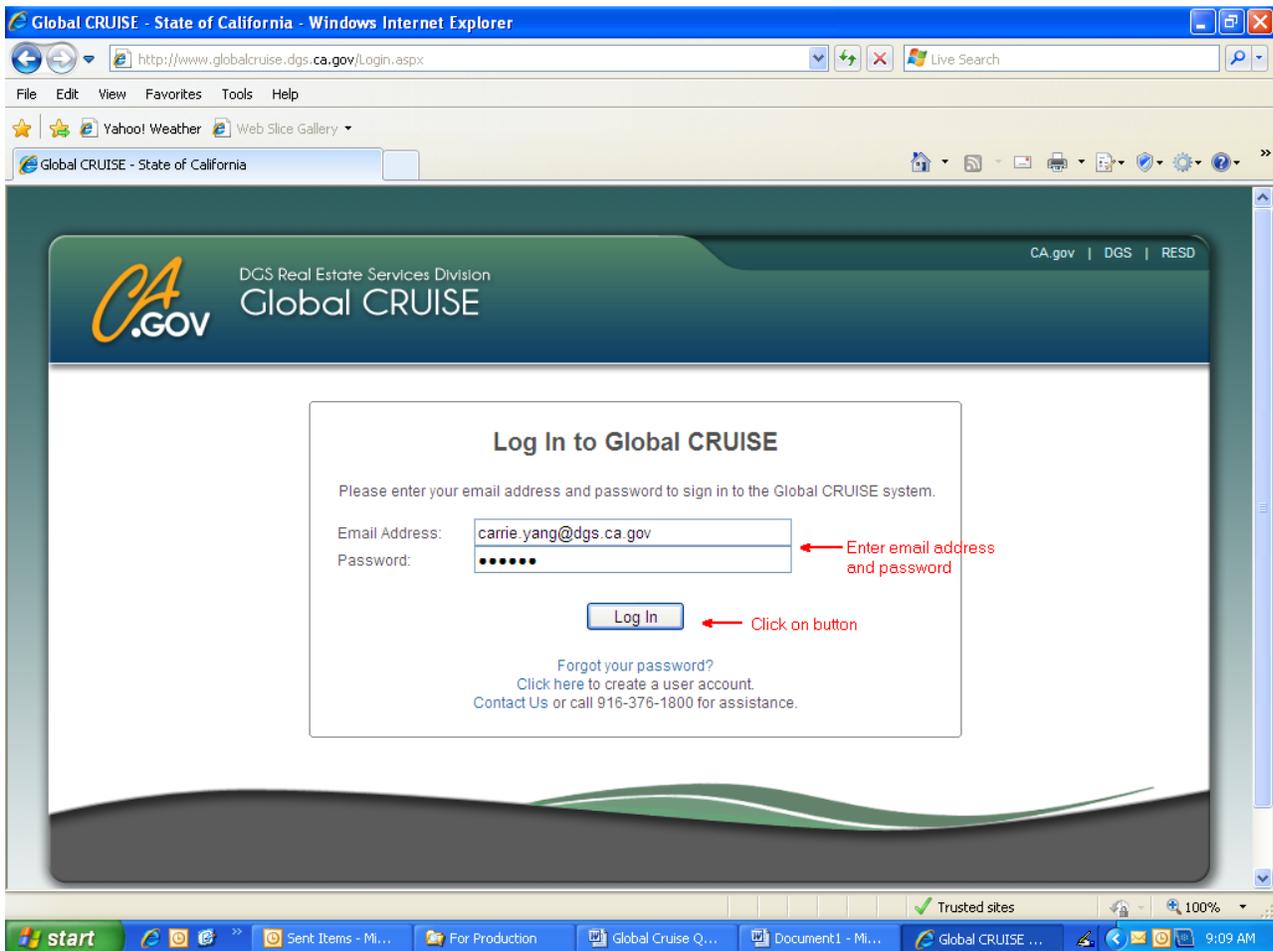
Instructions for Agency Representatives (AR) and Delegated Authorities (DA)

Welcome to Global CRUISE. This Quick Guide introduces some of the basic features of Global CRUISE and, beginning on page 7, demonstrates how to create and submit a service request to The Department of General Services (DGS), Real Estate Services Division (RESA). If you need help, click the Contact Us link located under the Log In button for RESA Customer Services Manager contact information. After log in, Contact Us is located under HELP on the Main Menu.

LOG IN TO GLOBAL CRUISE: Access the site at: www.globalcruise.dgs.ca.gov

- Enter your Email Address and Password.
- Click the Log In button.

👉 If you have forgotten your password, click the *Forgot your password?* link located directly under the Log In button.



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GETTING STARTED:

Before performing the Agency Representative (AR) and Delegated Authority (DA) functions in Global CRUISE, take a moment to go over some of the features of the Global CRUISE workspace so you can effectively navigate the system.

After successful log in, you will see your HOME page (also referred to as your Dashboard). Your Dashboard contains two grids to help you manage your requests.

PENDING GRID: The Pending grid displays requests that require action, as described below:

AR Role

- Requests initiated by you that are still in working status and have not been routed to a DA for approval.
- Requests routed to you by another user that require your action (i.e. review).
- When you select a DA for approval or route a request to another user, the request will remain in your Pending grid until the recipient claims it.

DA Role

- Requests submitted to you by an AR that require your approval.
- Requests initiated by you that are still in working status and have not been routed or submitted to RESD.
- Requests routed to you by another user that require your action (i.e. review and/or approval).
- When you approve and submit a request to RESD or route a request to another user, the request will remain in your Pending grid until the recipient claims it.

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Announcements (Click to Show/Hide)

Welcome to Global CRUISE! - 7/21/2011
Have fun creating CRUISE requests and checking out the features of the new Global CRUISE. Refer to the 'Quick Guide' for help creating requests and the 'Testing Features' document for more detailed info on the [Read More...](#)

Pending [Export to Excel](#)

ID	Routing History	Request Type	Date Created	Street Address	City	County	Previous Owner
45		Alterations in a State-C	7/26/2011				
47		Rent Reduction	7/26/2011				
48		Rent Reduction	7/26/2011				
53		Construction Services	7/29/2011				

Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4

Tracking [Export to Excel](#)

ID	Routing History	Date Created	Request Type	Street Address	City	County	Status
----	-----------------	--------------	--------------	----------------	------	--------	--------

Session Time Remaining: 07:43

Trusted sites +

100%

Start | Inboxes - Microsoft Outlook | DRAFT Global Cruise Qui... | Global CRUISE - State... | 2:04 PM

GLOBAL CRUISE QUICK GUIDE

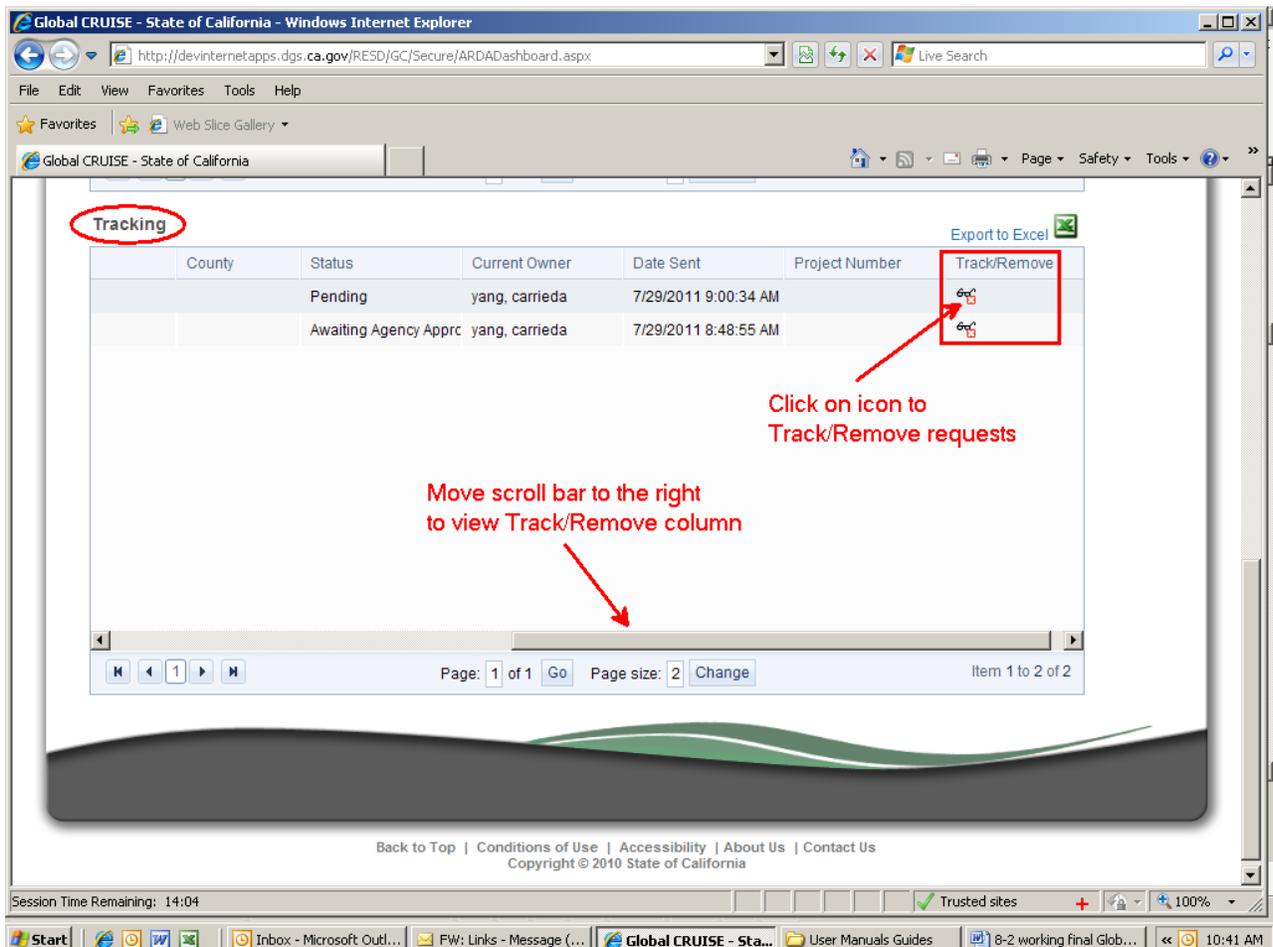
Instructions for Agency Representatives (AR) and Delegated Authorities (DA)

TRACKING GRID: The Tracking grid contains requests that you are monitoring:

AR and DA Roles

- When you route a request to another user, select a DA to approve a request, or submit a request to RESD, the request will automatically move from your Pending to your Tracking grid when the recipient claims it.
- Add requests to your Tracking grid using one of two options:
 - ♦ **Click request ID** to view a request and **click Tracking** on the Request Menu.
 - ♦ From the Search Results grid, **click the icon** under the Track/Remove column for the request you want to add.

 *Remove requests that you no longer want to track by using the Track/Remove function on your Tracking grid or the Search Results grid (scroll to right).*



County	Status	Current Owner	Date Sent	Project Number	Track/Remove
	Pending	yang, carrieda	7/29/2011 9:00:34 AM		
	Awaiting Agency Apprc	yang, carrieda	7/29/2011 8:48:55 AM		

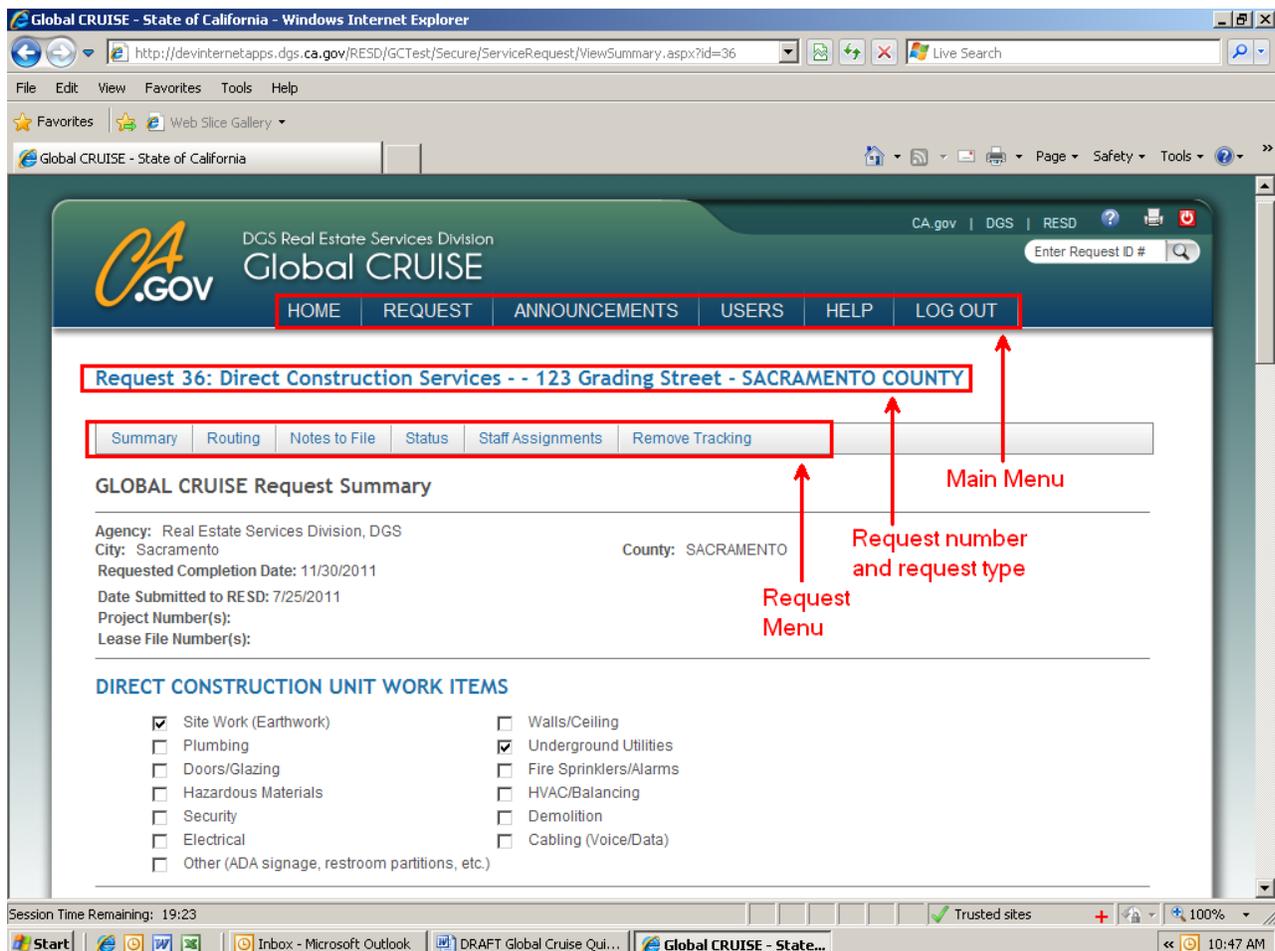
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MENUS: Global CRUISE utilizes three different menus to access various functions:

- **Main Menu (HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP AND LOG OUT):** Located directly under the Global CRUISE header, this menu provides access to your Dashboard as well as functions to begin or search for a request, manage user accounts, display announcements and obtain help documentation.
- **Request Menu (Summary, Routing, Status, Notes to File and Staff Assignments):** This menu is displayed when viewing a request and provides functions and commands to view, route, change an attribute of or record information about a specific request.

 *When viewing a request, the Request ID, Request Type, Street Address and County are displayed between the Main Menu and the Request Menu to identify the request.*



Global CRUISE - State of California - Windows Internet Explorer

http://devinternetapps.dgs.ca.gov/RESD/GCTest/Secure/ServiceRequest/ViewSummary.aspx?id=36

File Edit View Favorites Tools Help

Global CRUISE - State of California

CA.gov | DGS | RESD

Enter Request ID #

HOME REQUEST ANNOUNCEMENTS USERS HELP LOG OUT

Request 36: Direct Construction Services - - 123 Grading Street - SACRAMENTO COUNTY

Summary Routing Notes to File Status Staff Assignments Remove Tracking

GLOBAL CRUISE Request Summary

Agency: Real Estate Services Division, DGS
City: Sacramento
Requested Completion Date: 11/30/2011
Date Submitted to RESD: 7/25/2011
Project Number(s):
Lease File Number(s):

County: SACRAMENTO

DIRECT CONSTRUCTION UNIT WORK ITEMS

<input checked="" type="checkbox"/> Site Work (Earthwork)	<input type="checkbox"/> Walls/Ceiling
<input type="checkbox"/> Plumbing	<input checked="" type="checkbox"/> Underground Utilities
<input type="checkbox"/> Doors/Glazing	<input type="checkbox"/> Fire Sprinklers/Alarms
<input type="checkbox"/> Hazardous Materials	<input type="checkbox"/> HVAC/Balancing
<input type="checkbox"/> Security	<input type="checkbox"/> Demolition
<input type="checkbox"/> Electrical	<input type="checkbox"/> Cabling (Voice/Data)
<input type="checkbox"/> Other (ADA signage, restroom partitions, etc.)	

Session Time Remaining: 19:23

Trusted sites

100%

10:47 AM

Start | Inboxes - Microsoft Outlook | DRAFT Global Cruise Qui... | Global CRUISE - State...

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Instructions for Agency Representatives (AR) and Delegated Authorities (DA)

- **Left Navigation Menu:** This menu appears on each step (page) when you begin a request and displays a list of the sequential steps required to complete the request. The list of steps is displayed in two colors and fonts:
 - ♦ **Blue** indicates steps that have already been completed. You may revisit any step that is a blue link in the Left Navigation Menu at any time should you need to review or modify your data.
 - ♦ **Black** indicates steps that you have not completed.
 - ♦ **Italic** designates the step you are currently on.

👉 *Each step in a request consists of a question or group of related questions.*

The screenshot displays the Global CRUISE web application interface. At the top, there is a navigation bar with links for HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP, and LOG OUT. Below this, the page title is "Request 103: Alterations in a State-Owned Facility - Left Navigation". A sub-navigation bar contains tabs for Summary, Routing, Notes to File, Status, Staff Assignments, and Remove Tracking. The left navigation menu is highlighted with a red box and contains the following items: Begin Request, Space Planning Data, CTA Approval, Environmental Review, Project Information (italicized), Project Contact, Telecommunications, Existing Lease, Current/Project Location, Project Funding, Budget, Justification, General Comments, Attach Documents, and Select Approver. The main content area is titled "Project Information" and contains several text input fields with labels: "What is the project description/scope of this request?", "Is there a project name or reference number that your agency refers to for this project?", "What is the approximate/estimated size (square feet) of the requested project area?", and "What is the approximate number of workstations related to this request?". Red arrows point from the text "Left Navigation" to the navigation menu, and from "Italic to show current step" to the "Project Information" header and the "Project Information" menu item.

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BEGIN A SERVICE REQUEST

1. From any page, **hover your cursor over REQUEST** on the Main Menu, and **click Begin Request**.

Global CRUISE - State of California - Windows Internet Explorer

http://devinternetapps.dgs.ca.gov/RESD/GCTest/Secure/ARDADashboard.aspx

Global CRUISE - State of California

CA.gov | DGS | RESD

Enter Request ID #

HOME REQUEST ANNOUNCEMENTS USERS HELP LOG OUT

Begin Request
Search
Generate Blank Request

Announcements (Click to Show/Hide)

Welcome to Global CRUISE! 7/21/2011

Have fun creating CRUISE requests and checking out the features of the new Global CRUISE. Refer to the 'Quick Guide' for help creating requests and the 'Testing Features' document for more detailed info on the Read More...

Pending Export to Excel

ID	Routing History	Request Type	Date Created	Street Address	City	County	Previous Owner
45		Alterations in a State-C	7/26/2011				
47		Rent Reduction	7/26/2011				
48		Rent Reduction	7/26/2011				
53		Construction Services	7/29/2011				

Session Time Remaining: 09:56

Trusted sites + 100%

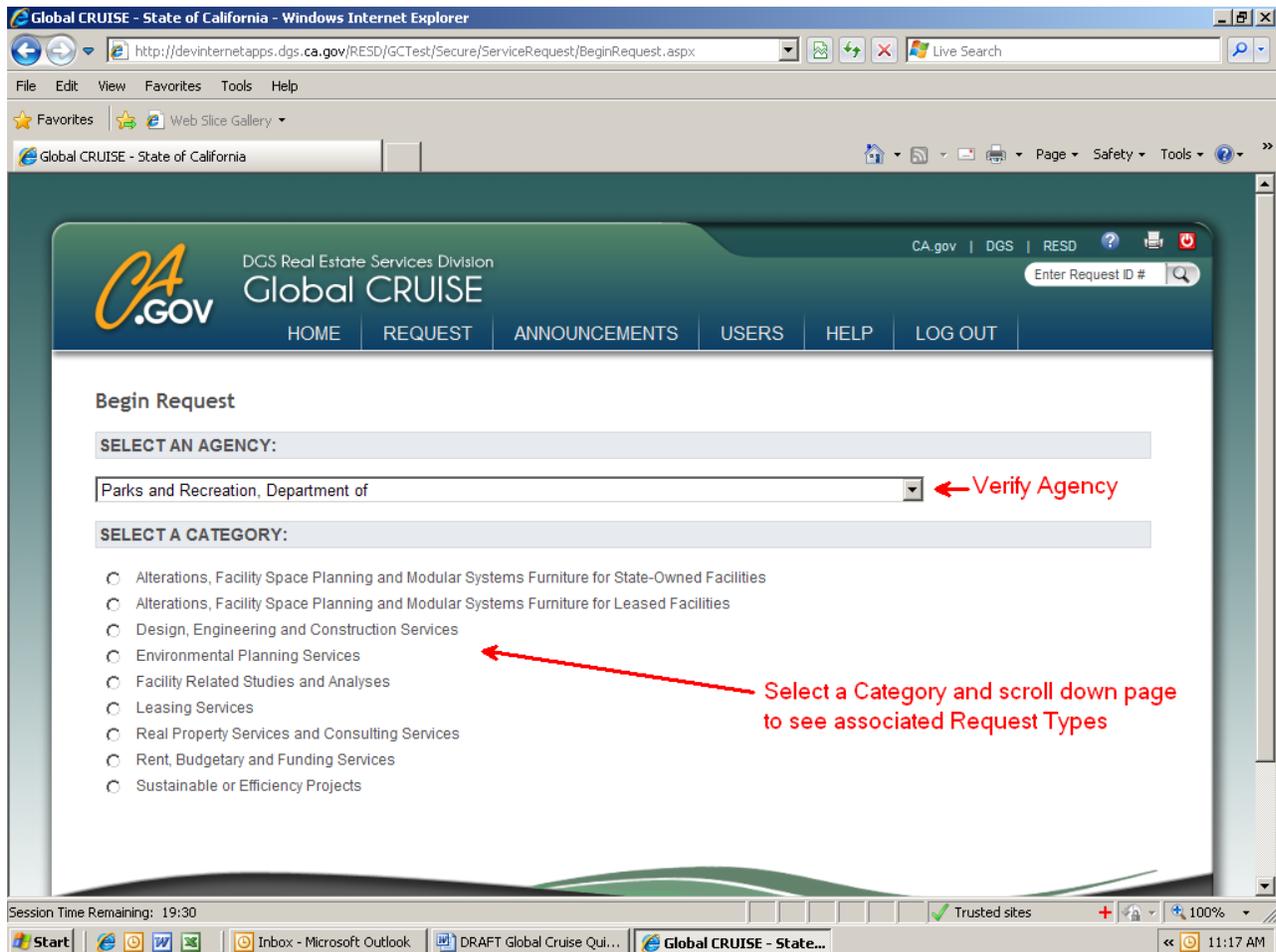
Start | Inbox - Microsoft Outlook | DRAFT Global Cruise Qui... | Global CRUISE - State... | 2:02 PM

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- Select an Agency:** If your agency (and sub-agency, if applicable) is different from what is displayed, use the dropdown list to make a selection.
- Select a Category:** Select the type of service your agency requires. Then scroll down the page to view request types.

 *If unsure, select a category and scroll down to see its associated request types. If you don't find what you need, select another category to display its associated request types.*

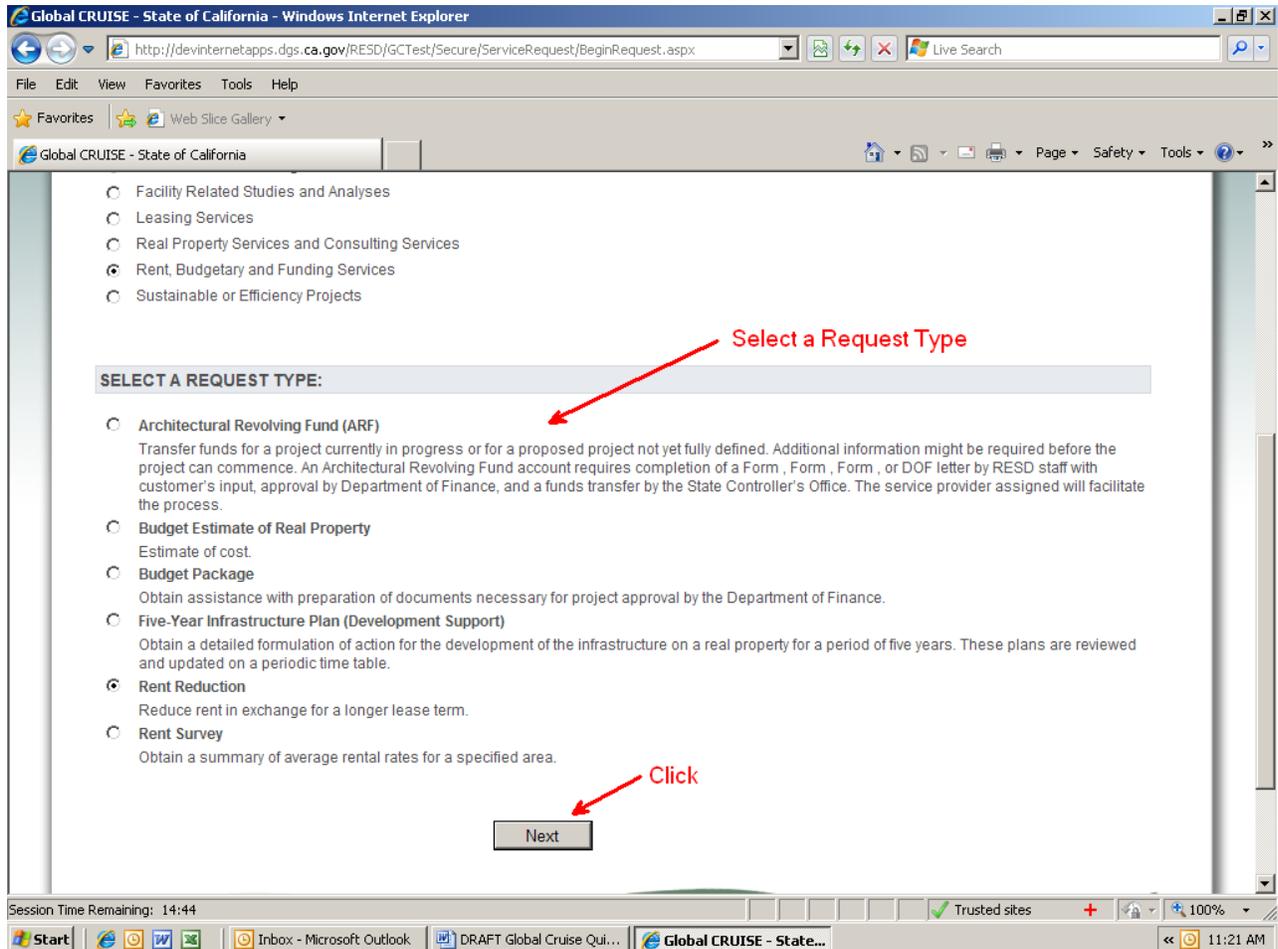


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4. **Select a Request Type** and **click the Next button**. Only a single request type can be selected for each request.

 *Data entered on each step (page) is saved when the Previous or Next button is clicked. After 15 minutes of inactivity, a warning is displayed that your session is about to expire. Interact with the system (click a button to load a new page), and your data will be saved.*

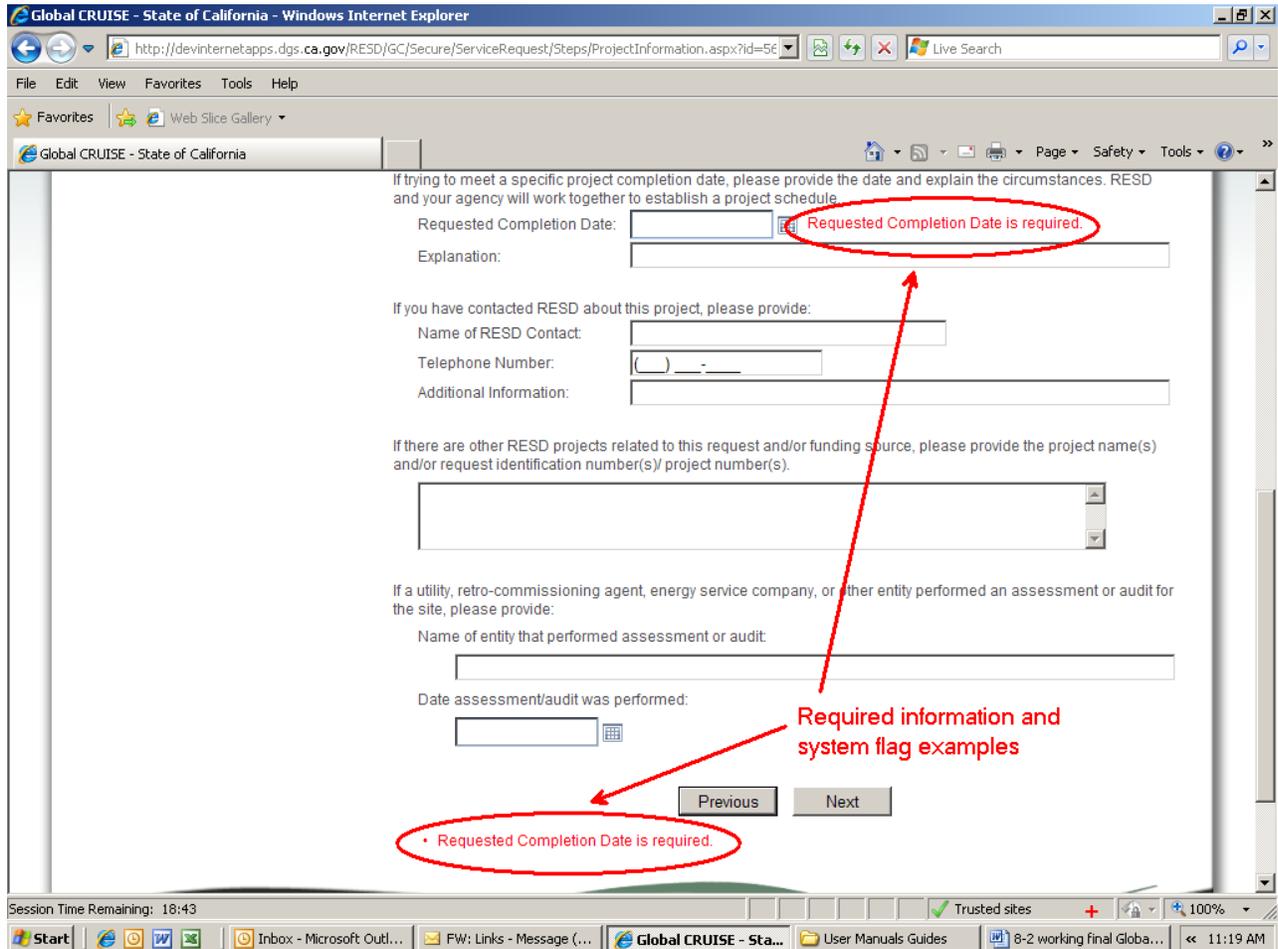


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5. **Continue completing the steps** (pages) that follow, and **click the Next button** on the bottom of each page.

 *If the Next button is clicked and you are returned to the top of the same page, scroll down the page to verify that entries were made for questions requiring answers (they will be flagged with a message in red).*



The screenshot shows a web browser window titled "Global CRUISE - State of California - Windows Internet Explorer". The address bar shows the URL: <http://devinternetapps.dgs.ca.gov/RESD/GC/Secure/ServiceRequest/Steps/ProjectInformation.aspx?id=56>. The page content includes several form sections:

- Requested Completion Date:** A text input field with a red error message: "Requested Completion Date is required."
- Explanation:** A text input field.
- If you have contacted RESD about this project, please provide:**
 - Name of RESD Contact:** A text input field.
 - Telephone Number:** A text input field with a phone number format mask.
 - Additional Information:** A text input field.
- If there are other RESD projects related to this request and/or funding source, please provide the project name(s) and/or request identification number(s)/ project number(s):** A text input field.
- If a utility, retro-commissioning agent, energy service company, or other entity performed an assessment or audit for the site, please provide:**
 - Name of entity that performed assessment or audit:** A text input field.
 - Date assessment/audit was performed:** A date input field.

At the bottom of the form, there are "Previous" and "Next" buttons. A red error message is displayed at the bottom of the page: "Requested Completion Date is required." A red arrow points from this message to the "Requested Completion Date" field. Another red arrow points from the text "Required information and system flag examples" to the "Requested Completion Date" field.

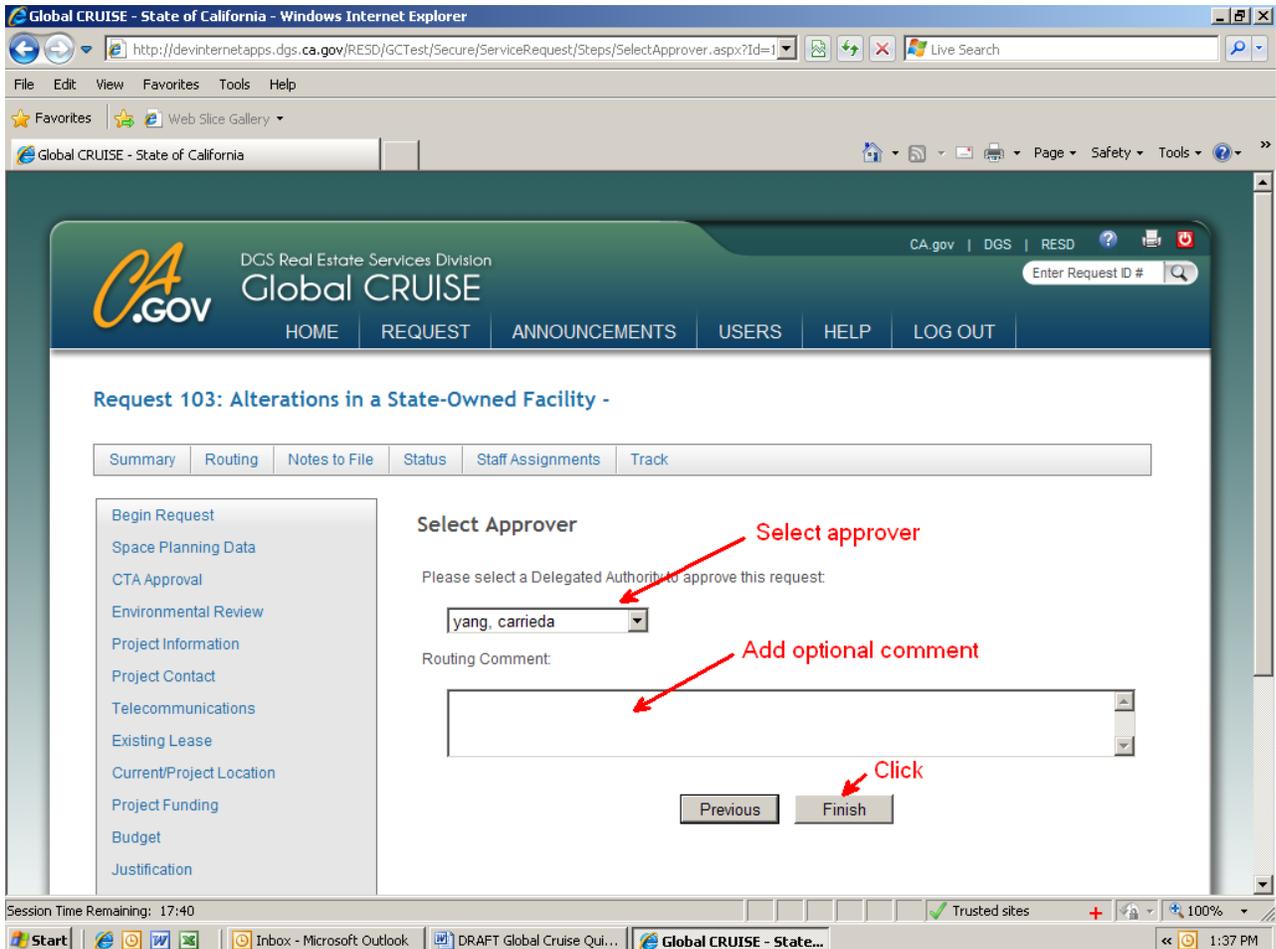
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Instructions for Agency Representatives (AR) and Delegated Authorities (DA)

Note: If you are a DA creating this request, skip to page 12, number 7.

- The Select Approver step is the final step. **Select a Delegated Authority** from the dropdown list, add a routing comment (optional) and **click the Finish button**.

 *The routing comment will appear in the notification email sent to the DA and in the Routing History under Routing.*



The screenshot displays the 'Global CRUISE' web application interface. At the top, there is a navigation bar with the CA.GOV logo and the text 'DGS Real Estate Services Division Global CRUISE'. Below this, there are tabs for 'HOME', 'REQUEST', 'ANNOUNCEMENTS', 'USERS', 'HELP', and 'LOG OUT'. The main content area shows 'Request 103: Alterations in a State-Owned Facility -' with a sub-menu containing 'Summary', 'Routing', 'Notes to File', 'Status', 'Staff Assignments', and 'Track'. On the left side, there is a vertical menu with options like 'Begin Request', 'Space Planning Data', 'CTA Approval', etc. The central part of the screen is titled 'Select Approver' and contains the instruction 'Please select a Delegated Authority to approve this request'. A dropdown menu is open, showing 'yang, carrieda'. Below this is a 'Routing Comment' text area. At the bottom of the form are 'Previous' and 'Finish' buttons. Red arrows and text annotations highlight the 'Select approver' dropdown, the 'Add optional comment' text area, and the 'Click' on the 'Finish' button.

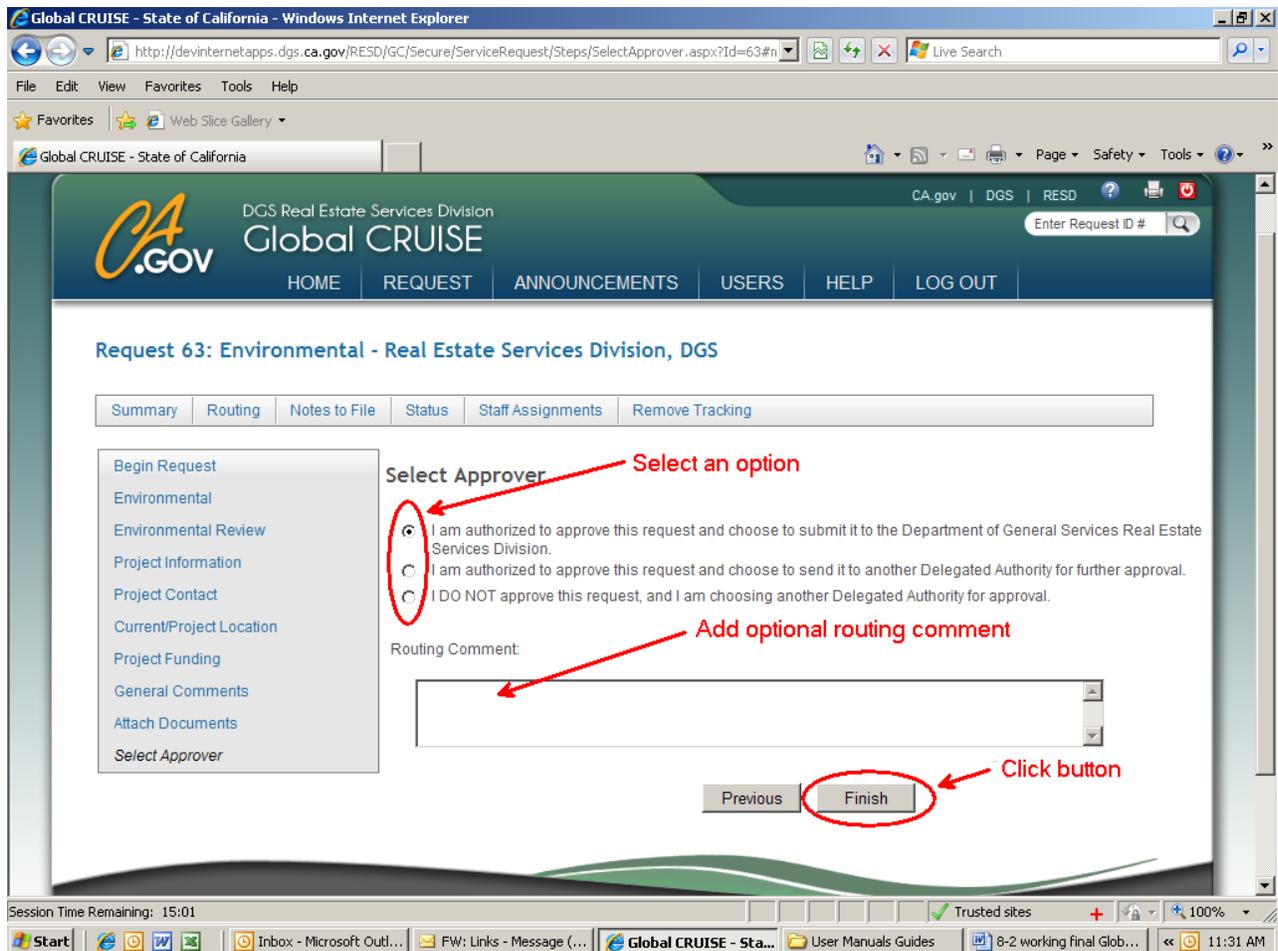
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Note: If you are an AR creating this request, skip to page 13, number 8.

7. As a DA, the Select Approver page gives you three options. **Select an option**, add an optional routing comment and **click the Finish button**.

 *The routing comment will appear in the notification email sent to RESD and in the Routing History under Routing.*



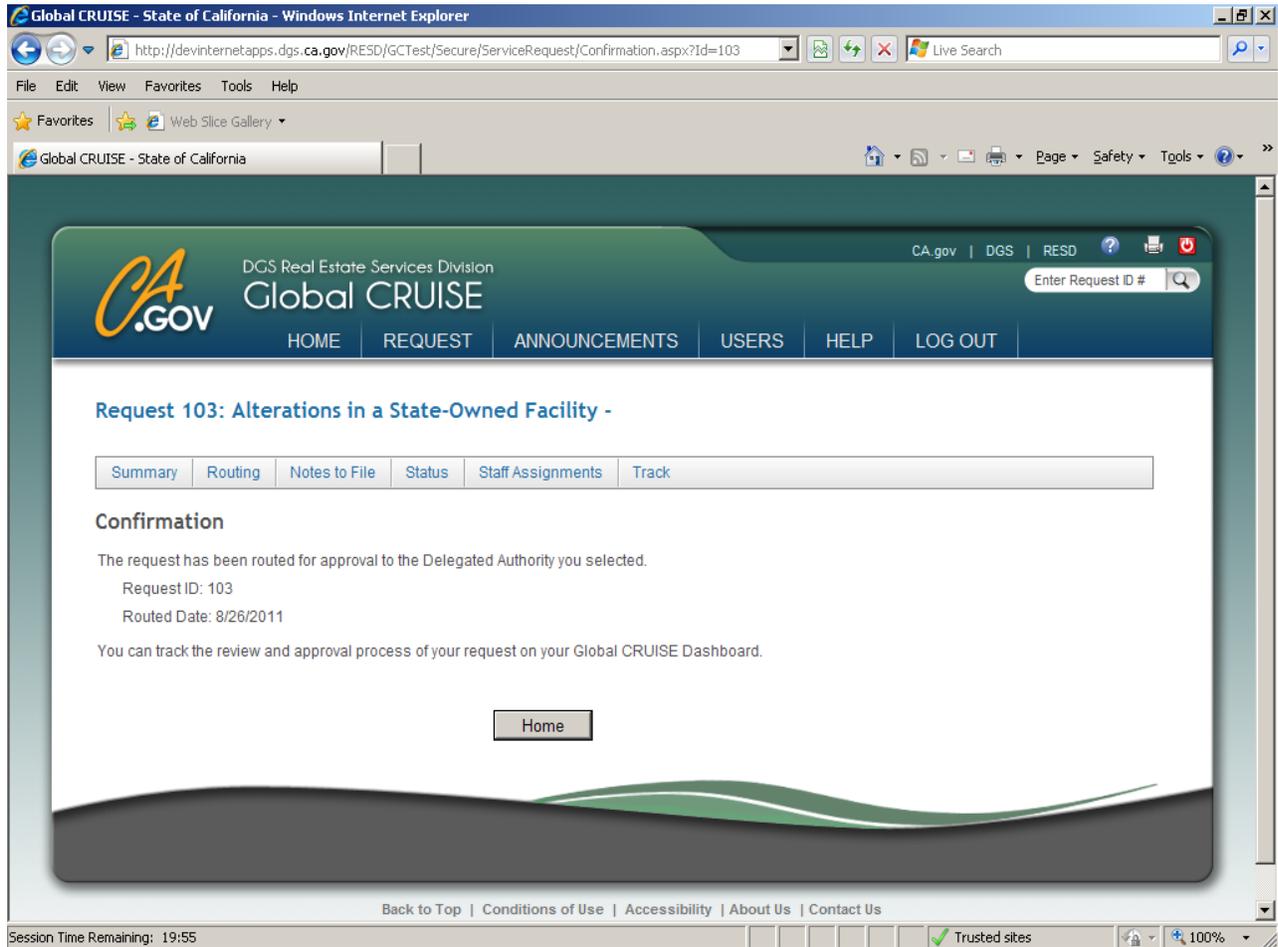
The screenshot displays the 'Global CRUISE' web application interface. The page title is 'Request 63: Environmental - Real Estate Services Division, DGS'. The main content area is titled 'Select Approver' and contains three radio button options for approval. The first option is selected and circled in red. Below the options is a 'Routing Comment' text box, also highlighted with a red arrow. At the bottom of the page, there are 'Previous' and 'Finish' buttons, with the 'Finish' button circled in red. Red annotations with arrows point to these key elements: 'Select Approver', the first radio button option, the 'Routing Comment' field, and the 'Finish' button.

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- The Confirmation page displays as validation that the request was submitted to RESD. Your request can be viewed in the Pending grid on your HOME page (Dashboard) until the recipient claims it. Once claimed, the request will appear in your Tracking grid.

 Click the request ID in your Pending or Tracking grid to view the request.



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QUICK SEARCH

To find a single request, use the Quick Search field located in the top right-hand corner of the screen. **Enter the request ID and click the magnifying glass icon.**

The screenshot shows the Global CRUISE web application interface. At the top, there is a navigation bar with the CA.GOV logo and the text "DGS Real Estate Services Division Global CRUISE". The navigation bar includes links for HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP, and LOG OUT. In the top right corner, there is a search field labeled "Enter Request ID #" with a magnifying glass icon. Two red arrows point to this search field, with a red text box next to them that says "Enter ID and click to find request".

Below the navigation bar, there is an "Announcements" section with a "Welcome to Global CRUISE! - 7/21/2011" message. Below the announcements, there is a "Pending" section with a table of requests. The table has columns for ID, Routing Histo, Request Type, Date Created, Street Address, City, County, and Previous Owner. The table contains four rows of data:

ID	Routing Histo	Request Type	Date Created	Street Address	City	County	Previous Owner
53		Construction Services	7/29/2011				
48		Rent Reduction	7/26/2011				
47		Rent Reduction	7/26/2011				
45		Alterations in a State-C	7/26/2011				

At the bottom of the page, there is a taskbar showing the Start button, several open applications (Inbox - Microsoft Outlook, DRAFT Global Cruise Qui..., Global CRUISE - State...), and the system clock showing 1:41 PM.

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SEARCH FOR REQUESTS

1. From any page, **hover your cursor over REQUEST on the Main Menu, and click Search.** You will be redirected to the Search for Service Requests page.
2. **Enter search criteria** in one or more fields. Additional fields are available under the More Search Options link.
3. **Click the Search button.** The results display in the Search Results grid at the bottom of the page.
4. To view a request, **click ID** for the request you want to see.
5. To add a request to your Tracking grid from the Search Results grid, **click the Track/Remove icon** for the request you want to add.

The screenshot shows the Global CRUISE website interface. The top navigation bar includes links for HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP, and LOG OUT. A dropdown menu is open under the REQUEST link, showing options: Begin Request, Search, and Generate Blank Request. A red arrow points to the Search option. Below the navigation, there is a section for Announcements and a 'Pending' table. The table has columns for ID, Routing Histo, Request Type, Date Created, Street Address, City, County, and Previous Owner. The table contains four rows of data.

ID	Routing Histo	Request Type	Date Created	Street Address	City	County	Previous Owner
53		Construction Services	7/29/2011				
48		Rent Reduction	7/26/2011				
47		Rent Reduction	7/26/2011				
45		Alterations in a State-C	7/26/2011				

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Instructions for Agency Representatives (AR) and Delegated Authorities (DA)

The screenshot shows the Global CRUISE web application interface within a Windows Internet Explorer browser window. The browser's address bar displays the URL: `http://devinternetapps.dgs.ca.gov/RESD/GCTest/Secure/ServiceRequest/Search.aspx`. The page header includes the CA.GOV logo, the text "DGS Real Estate Services Division Global CRUISE", and navigation links for HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP, and LOG OUT. A search bar in the top right corner is labeled "Enter Request ID #".

The main content area is titled "Search For Service Requests" and contains the instruction "Enter one or more fields to find request(s)". Below this, there is a form with the following fields:

- Request ID:
- Project Number:
- Request Type:
- Agency:
- Billing Code:
- Street Address:
- City:
- County:
- State:
- Zip Code:

Below the form, there is a link for "More Search Options (Click to Show/Hide)". At the bottom of the form area, there are "Search" and "Clear" buttons. The "Search" button is circled in red.

Red annotations are present on the page:

- A red arrow points to the "Request ID" input field with the text "Enter information for search".
- A red arrow points to the "More Search Options" link with the text "Click for more options".
- The "Search" button is circled in red.

The browser's taskbar at the bottom shows the Start button, several application icons (including Microsoft Outlook), and the system clock displaying 2:10 PM. The session time remaining is shown as 16:58.

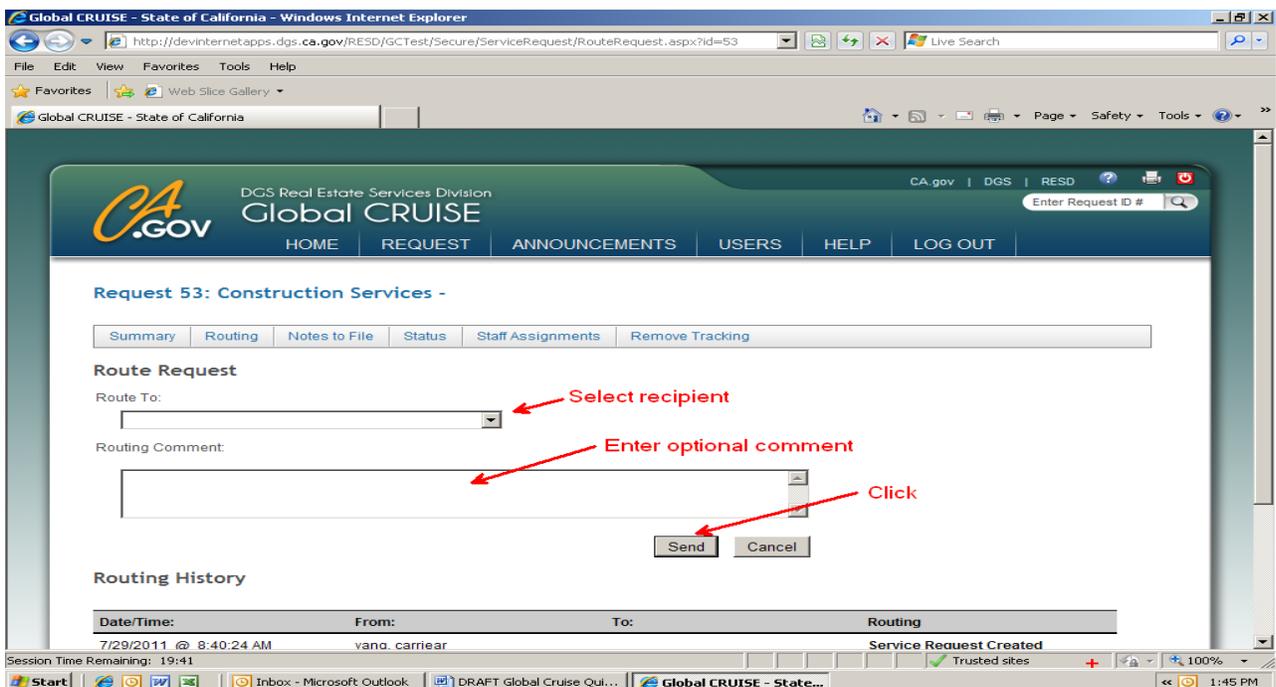
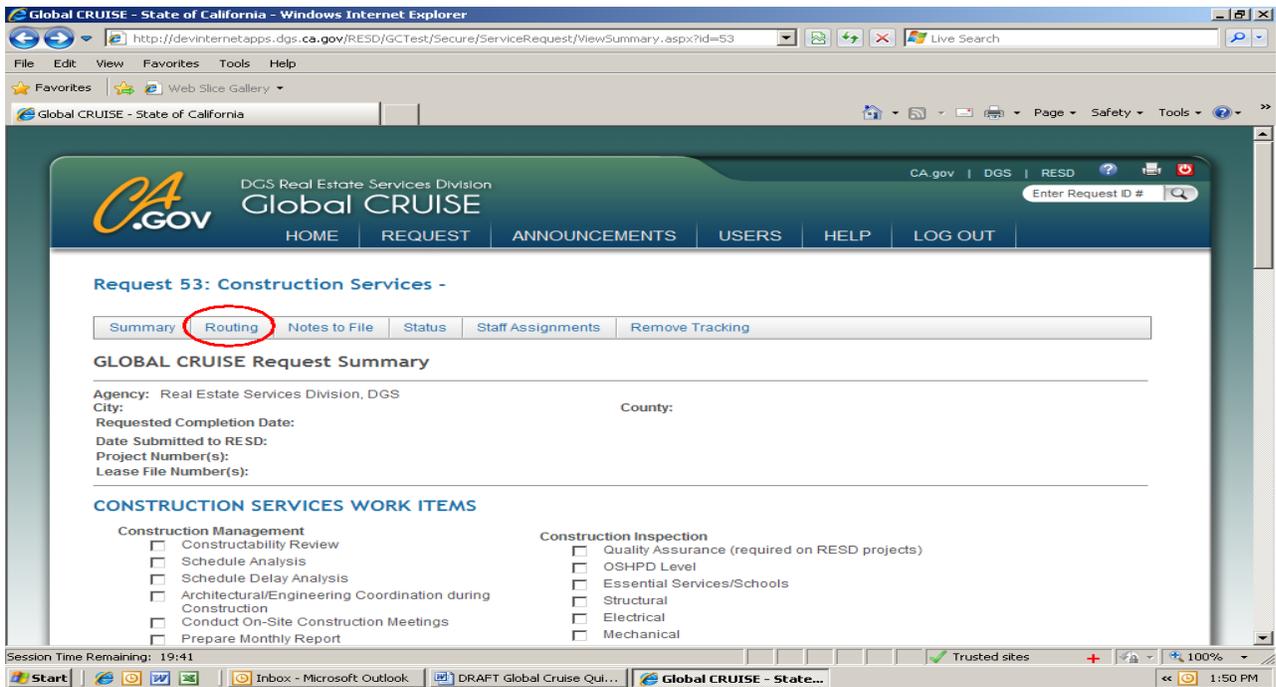
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ALTERNATE ROUTING

This feature is used when a Global CRUISE user needs to route a request outside of the regular process flow; for example, when an AR needs to route a request to another AR.

Click Routing on the Request Menu. Under Route Request, **select a recipient from the dropdown list and click the Send button.** The recipient will receive an email alert, and the request will be displayed in their Pending grid.



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NOTES TO FILE

On the **Request Menu**, click **Notes to File** to add notes to a request or to read other users' notes. An agency's Notes to File are available only to users of that agency.

The screenshot displays the Global CRUISE web application interface. At the top, the browser window shows the URL: <http://devinternetapps.dgs.ca.gov/RESD/GCTest/Secure/ServiceRequest/NotesToFile.aspx?id=53>. The application header includes the CA.GOV logo, "DGS Real Estate Services Division", and "Global CRUISE". Navigation links include HOME, REQUEST, ANNOUNCEMENTS, USERS, HELP, and LOG OUT. A search bar for "Enter Request ID #" is also present.

The main content area is titled "Request 53: Construction Services -" and features a tabbed interface with options: Summary, Routing, Notes to File (selected), Status, Staff Assignments, and Remove Tracking. Under the "Notes To File" section, there is a "Comments:" label and a text input field. Below the input field are "Save" and "Clear" buttons. The text "No Current Notes to File." is displayed below the input field.

At the bottom of the page, there are links for "Back to Top", "Conditions of Use", "Accessibility", "About Us", and "Contact Us", along with the copyright notice "Copyright © 2010 State of California". The browser status bar at the very bottom shows "Session Time Remaining: 19:49" and "Trusted sites".

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CUSTOMIZE YOUR GRID FEATURES

These features allow you to manipulate requests in your grids and to customize the layout of the columns.

- **Sort by Column:** Requests within a grid can be sorted by a column. Right click on the column name to see a dropdown list of options that include ascending and descending. Left click to select an option.
- **Resize or Reorder Columns:** Columns can be resized or reordered to suit your needs. Place the cursor left of the column name that you want to reposition. A two-way arrow is for resizing the column. A four-way arrow allows for the column to be moved. Both are done by dragging and dropping while staying within the header.
- **Hide or Display Columns:** Select the columns you want to display in a grid. Right click on the column header and select Columns. Select the checkboxes for the column names you want to display.
- **Scroll to View Columns:** Use the horizontal scroll bar to view all columns that are displayed in a grid.
- **Define Grid Page Size:** Define the number of requests to view in a grid using the page size field. You can choose to view all requests in the grid on one page with a vertical scroll bar or you can choose to view multiple pages.

The screenshot shows the Global CRUISE web application interface. The main content area displays a 'Pending' grid with the following data:

ID	Routing History	Request Type	Date Created	Street Address	City	County	Previous Owner
45		Alterations in a State-C	7/26/2011				
47		Rent Reduction	7/26/2011				
48		Rent Reduction	7/26/2011				
53		Construction Services	7/29/2011				

Annotations on the screenshot include:

- Red arrows pointing to the 'Date Created' column header with the text: "Sorted Date Created in ascending order".
- Red arrows pointing to the 'Request Type' column header with the text: "Re-sized column to view entire label".
- Red arrows pointing to the 'Request Type' column header with the text: "Re-ordered Request Type column to the right of Routing Request".
- Red arrows pointing to the 'Page size' field (set to 4) with the text: "Change number to view more requests in grid".
- Red arrows pointing to the 'Item 1 to 4 of 4' text with the text: "Number of requests in grid".