

# Global CRUISE 2 Quick Guide for the Service Provider Assigner (SPA)

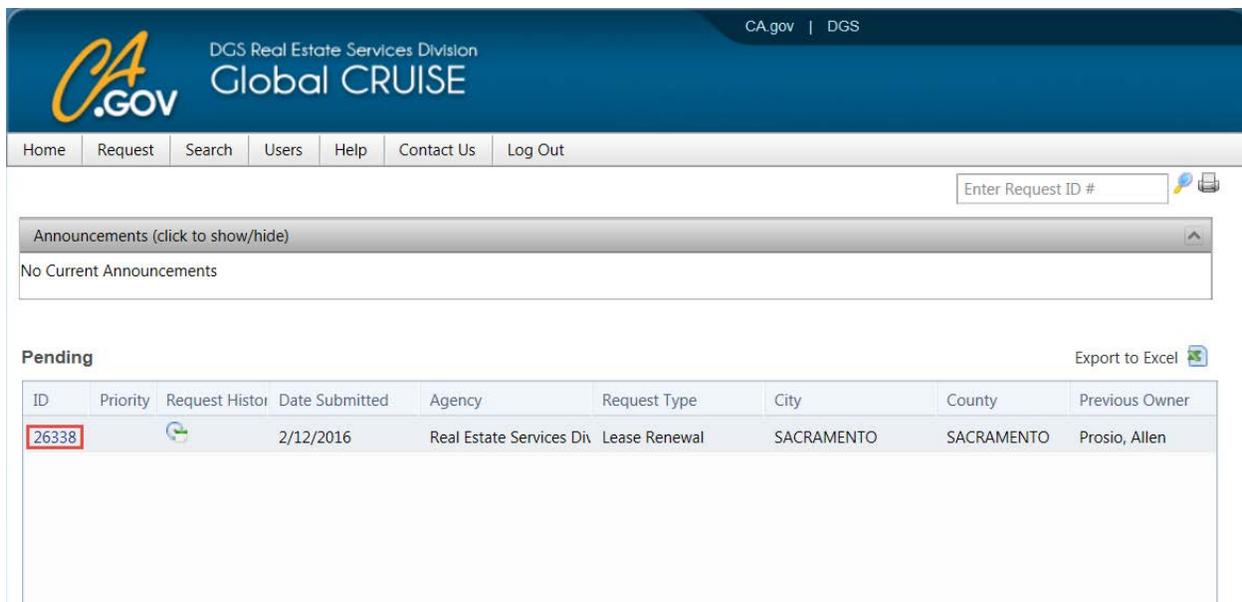
## ENTER STAFF ASSIGNMENTS

The CRUISE Summary contains information entered by the agency or organization requesting services from RESD, as well as the Customer Services Manager (CSM) and Regional Portfolio Manager (RPM) who reviewed the request.

To enter the system and view the Summary, click on the link in the email you received or access the site ([globalcruise.dgs.ca.gov](http://globalcruise.dgs.ca.gov)) from your Favorites on your web browser. The system uses your DGS network credentials to automatically log you in.

If a Log In page displays, enter your DGS network user name in the field labeled Email Address and your DGS network password. For example, Alice Klinger enters her user name, `aklinger`, in the Email Address field and uses the same password she uses to log into her computer every morning.

Once you are logged in, your Home page displays. Your Home page contains two grids, a Pending and Tracking grid. Your Pending grid contains requests that require your action, and your Tracking grid displays requests that you returned to the Branch Catcher (BC). Click on the ID number in your Pending grid to open the request and view the Summary.



The screenshot shows the Global CRUISE 2 web application interface. The header includes the CA.GOV logo, the text "DGS Real Estate Services Division Global CRUISE", and the URL "CA.gov | DGS". A navigation menu contains links for Home, Request, Search, Users, Help, Contact Us, and Log Out. A search bar labeled "Enter Request ID #" is located in the top right. Below the navigation is an "Announcements" section with the text "No Current Announcements". The main content area features a "Pending" section with an "Export to Excel" button. A table displays a single pending request with the following data:

ID	Priority	Request Histor	Date Submitted	Agency	Request Type	City	County	Previous Owner
26338			2/12/2016	Real Estate Services Div	Lease Renewal	SACRAMENTO	SACRAMENTO	Prosiso, Allen

After reviewing the Summary, scroll to the bottom of the page and click on the Proceed to Staff Assignments button.

The screenshot shows the Global CRUISE web application interface. At the top, there is a blue header with the CA.GOV logo and the text "DGS Real Estate Services Division Global CRUISE". Below the header is a navigation menu with links for Home, Request, Search, Users, Help, Contact Us, and Log Out. A search bar on the right contains the text "Enter Request ID #". The main content area displays the title "Request 26338: Lease Renewal - Real Estate Services Division, DGS - Sacramento County". Below the title is a tabbed interface with tabs for Summary, Request History, Notes to File, Project Setup, Email Summary, and Track. The "Summary" tab is active, showing the following information: Agency: Real Estate Services Division, DGS; City: Sacramento; Requested Completion Date: 2/1/2018; Date Submitted to RESD: 2/12/2016; Project Number(s); Lease File Number(s): 4610004. To the right of this information, it shows "Unit to Occupy Space: Test" and "County: Sacramento". Below this is a section titled "Existing Lease" with a partially visible number "1102". At the bottom of the page, there is a grey bar labeled "ACTION REQUIRED" and a button labeled "Proceed to Staff Assignments" which is highlighted with a red border.

See next page

The Project Setup page opens and displays project details for one or more projects identified for the request. If only one project is identified, the project is already expanded. If more than one project is identified, the projects are collapsed. Click on one of the > symbols near the left margin to expand and view the project details for each project.

The screenshot shows the CA.gov Global CRUISE 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 is a secondary navigation bar with links for Home, Request, Search, Users, Help, Contact Us, and Log Out. A search box labeled "Enter Request ID #" is located on the right side of this bar. The main content area displays the title "Request 26338: Lease Renewal - Real Estate Services Division, DGS - Sacramento County" and a set of tabs: Summary, Request History, Notes to File, Project Setup (selected), Email Summary, and Track. Under the "Project Setup" tab, the following information is shown: "Date Requested Action Needed: 2/1/2018", "Lease File Number: 4610004", and "Department Billing Code: 099999". A section titled "PROJECTS FOR THIS SERVICE REQUEST" contains a table with two rows of project data. The first row has a red-bordered expand icon (>) next to project number GC26338-1, funding type SRF, and an empty project title. The second row has a grey-bordered expand icon (>) next to project number GC26338-2, funding type ARF, and an empty project title. Below the table is an "ACTION REQUIRED" section with a button labeled "Return to Branch Catcher". The page footer features a decorative blue and brown wavy graphic.

*See next page*



Enter Request ID #  

### Request 26338: Lease Renewal - Real Estate Services Division, DGS - Sacramento County

Summary Request History Notes to File Project Setup Email Summary Track

#### Project Setup

Date Requested Action Needed: 2/1/2018  
Lease File Number: 4610004

Department Billing Code: 099999

#### PROJECTS FOR THIS SERVICE REQUEST

Edit	Project Number	Funding Type	Project Title	Delete									
✓	GC26338-1	SRF											
<p><b>Project Number:</b> GC26338-1</p> <p><b>Project Title:</b></p> <p><b>Project Scope:</b></p> <p><b>Location:</b> 1102 Q STREET SACRAMENTO SACRAMENTO CA 95811 STR: 4610 Lease: 4610004</p> <p><b>Managing Branch/Section:</b> RELPS Leasing - Sacramento</p> <p><b>Supporting Branch (Optional):</b> RELPS Planning - Sac</p> <p><b>Project Template:</b> RESD-PMDB-SEC1 LEASNG-SRF</p> <p><b>Funding Type:</b> SRF</p>													
<p><b>Project Setup Instructions:</b> </p> <p>2/12/2016 @ 3:31 PM</p> <p>by Klinger, Alice</p> <p>Enter information for the Branch Catcher.</p> <p style="text-align: right;"><input type="button" value="Enter Project Setup Instructions"/></p>													
<p><b>Staff Assignments</b></p> <p>The following RESD Staff is assigned to the Key Member Roles indicated:</p> <table border="1"> <thead> <tr> <th>Role</th> <th>RESD Staff</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td>Leasing Unit Manager</td> <td>Zadel, Kerry</td> <td></td> </tr> <tr> <td>Planning Unit Manager</td> <td>Nguyen, Diem</td> <td></td> </tr> </tbody> </table> <p style="text-align: right;"><input type="button" value="Enter/Edit Staff Assignments"/></p>					Role	RESD Staff	Hours	Leasing Unit Manager	Zadel, Kerry		Planning Unit Manager	Nguyen, Diem	
Role	RESD Staff	Hours											
Leasing Unit Manager	Zadel, Kerry												
Planning Unit Manager	Nguyen, Diem												
<p><b>Project Type Code:</b> Project Type Code not selected</p> <p><b>Intra-Agency Instructions :</b></p> <p><input type="checkbox"/> New Project File - original information</p> <p><input type="checkbox"/> New Space Planning File - copy all information</p> <p><input type="checkbox"/> Pull Existing Project File - original information</p> <p><input type="checkbox"/> Send Customer Relocation Advisory Memo (new space only)</p> <p><input type="checkbox"/> Add project to Access Database</p> <p><a href="#">Generate Form 9</a></p> <p style="text-align: right;"><input type="button" value="Enter/Edit RELPS/RPSS Instructions"/></p>													
>	GC26338-2	ARF											

#### ACTION REQUIRED

View the Project Title, Scope, and Managing Branch as well as any instructions from the CSM or BC that display under the heading, Project Setup Instructions. You may also enter any instructions you wish to convey to the BC. Click on the Enter Project Setup Instructions button, enter a note and click on the Save button. Project Setup Instructions display only on the Project Setup page and are visible only to RESD users.

Click on the Enter/Edit Staff Assignments button to enter staff assignments for the identified project. Select the Role and RESD staff from the filterable dropdown lists, and enter the number of hours assigned (optional). When all of your assignments are entered, click on the Save button. A red X appears next to your entries when the staff assignments are saved. Click on the red X to delete an entry. If the dropdown list does not contain an employee's name, inform the CSM or BC that a name does not display in the dropdown list.

If more than one project is identified for your Branch or Section, enter staff assignments for each project. If the staff assignments are the same for multiple projects, you may enter them for one project and leave a note to the BC under the Project Setup Instructions for the others.

Additional information is required for requests assigned to RELPS and RPSS: Project Type Code and/or Intra-Agency Instructions. To provide this information, click on the button labeled Enter/Edit RELPS/RPSS Instructions, make your selections and click on the Save button.

When your entries are complete, click on the Return to Branch Catcher button on the bottom of the Project Setup page. The optional routing comment displays in the Request History, which both Agency and RESD users can view. When you click on the Send button, a confirmation message displays, and the request automatically moves from your Pending to your Tracking grid for easy access. The system sends an email alert to the BC when all the staff assignments for a request are returned.

The BC completes the project setup in ABMS and then broadcasts the request. The system sends a broadcast email to the agency users who initiated and approved the request to inform them their project(s) has been assigned and to the individuals assigned to the project(s). Employees who processed the request are also included on the broadcast email.