



## USING PDS2 – SUBMITTING REQUESTS – CONSTRUCTION INVESTIGATION

### REQUESTING CONSTRUCTION/CONSTRUCTION INVESTIGATION/PROJECT FUNDING

Although funding may have been allocated to your department, you still need to go into the PDS2 system to request or allocate the use of that funding to a specific project or equipment purchase. This guide will show you how to formally request the use of funding for a capital **construction/construction investigation** project.

Requests for capital funds/projects are organized into three categories:

1. Construction/Construction Investigation
2. Equipment
3. Information Technology

Each category is further broken down into three types:

- New
- Upgrade
- Replacement

You will also be asked if the request requires incremental operating budget.

Each category and type of request requires a different set of steps in PDS2. This document will outline the various steps by request category and type as well as added steps for those requests that impact the operating budget.

### GETTING STARTED

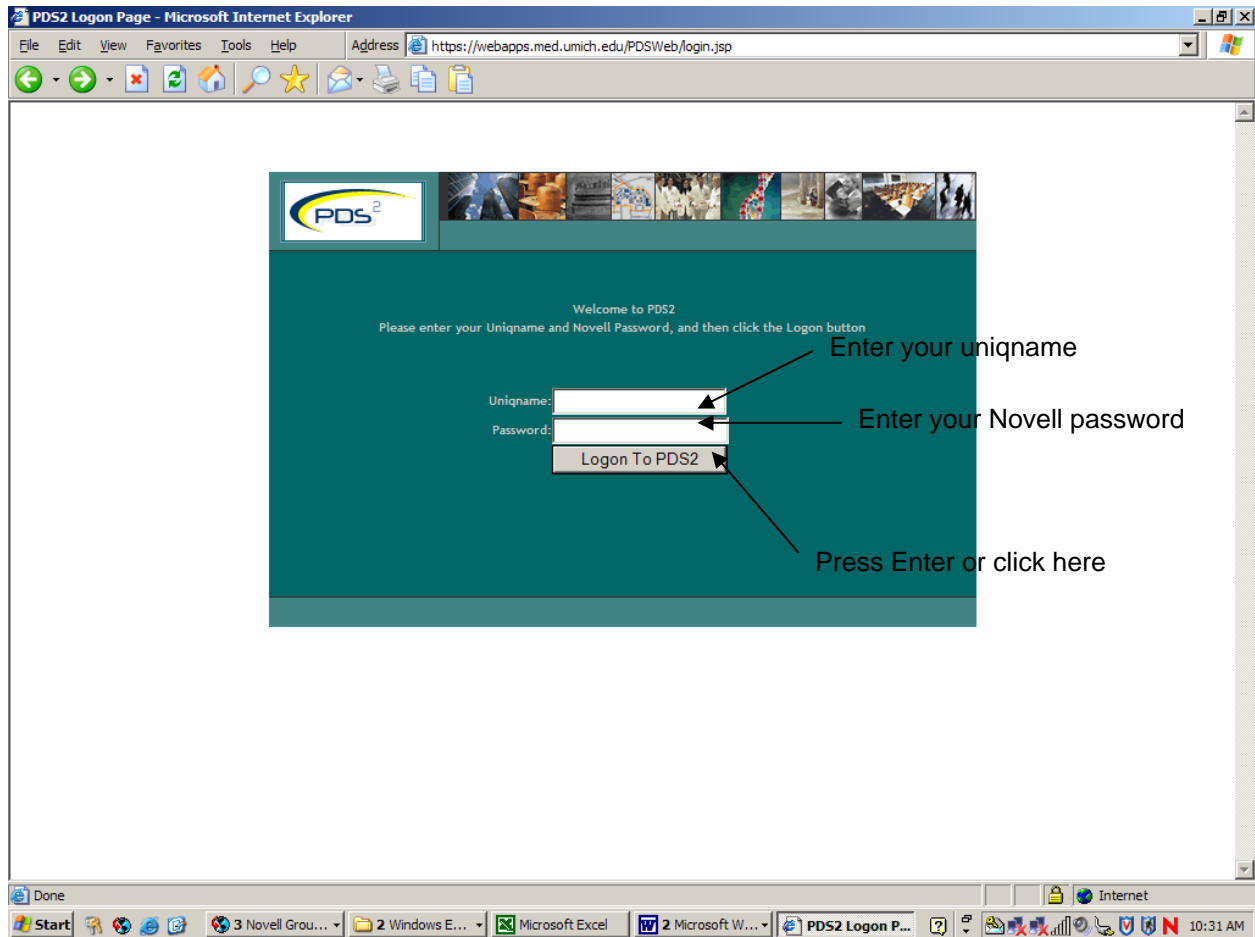
The next few pages will show you how to log in to the system, select a new request, and fill out key information.



## USING PDS2 – SUBMITTING REQUESTS – CONSTRUCTION INVESTIGATION

### Step 1 – Log in to PDS2

- Click on the PDS2 system link from the CBO website <http://www.med.umich.edu/facilities/capital.htm> or go directly to the system link at <https://pds.med.umich.edu/PDSWeb/login.jsp>.
- Enter your uniqname (user ID).
- Enter your Novell password.
  - Call the MCIT Help Desk at 936-8000 if you need assistance with your uniqname or Novell password.





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### Step 2 – Start a New Request

- Click on “Enter a new request” in the upper left hand corner of the PDS2 screen.

Click “Enter a new request”



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### Step 3 – Complete the Capital Request Entry screen

- Type your **Department ID** in the space provided and click Enter.
  - Contact your Department Manager, Business Manager, or AHD if you do not know which Dept. ID to use.
- Information about the Department ID will appear:
  - **Admin code** – Finance’s hierarchy for budget account numbers (the area to which the Dept. ID rolls up).
  - **Department Manager** – the responsible party/authorized owner of the Dept. ID. This person must approve your request.
  - **Trusted Manager** – the Department Manager’s representative. When assigned, has the same rights and responsibilities as the Department Manager.
  - **AHD** (Associate Hospital Director) - the high level administrator of a department responsible for approving all capital requests over \$150k and allocating incremental operating funds needed to maintain the capital investment. This person must approve your request if it is over \$150k and/or if it requires operating budget funding. The AHD also reviews any request to use AHD capital funds. A Department Manager can request AHD review of any request.  
**NOTE:** All Construction Investigation requests require AHD approval.
  - **Trusted Director** – the AHD’s representative. When assigned, has the same rights and responsibilities as the AHD.
- Select a **request category**:
  - **Construction** – the project primarily involves physical space (either renovation or new construction). **NOTE:** Use this category if a furniture request requires assistance from Interior Design.
  - **Equipment** – the request is for a new piece (or pieces) of equipment only. **NOTE:** Use this category for all furniture requests unless they require assistance from Interior Design or are otherwise part of a Construction project.
  - **IT** – the request is for any item (hardware, software, etc.) related to information technology and procured and managed by MCIT. Purchases going directly through the vendor should be categorized as Equipment.
  - **NOTE:** This job aid walks you through entering a Construction/Construction Investigation request. Select “Construction” for either type.
- Select a **request type**:
  - **New** – use this type for items that will not be replacing or upgrading something that already exists. **NOTE:** A Construction/Construction Investigation request will only be “New” if it is actually for new construction (a new building, etc.).
  - **Replacement** – use this type for items that will replace something existing (typically used for tangible assets). Construction/Construction Investigation requests are rarely seen in this category, although it may be used for the replacement of an HVAC unit, for example.
  - **Upgrade** – use this type for requests that involve the upgrade of an existing system or building (typically used for IT and Construction/Construction Investigation requests).



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- Select whether the request has an **operating budget impact**:
  - At this point, you are selecting yes or no.
  - Consider the ongoing impact of the capital investment:
    - Does the item require an ongoing maintenance agreement?
    - Will the project result in the need for additional staff?
    - Will the project result in the need for increased utilities?

*See the next page for a screen shot of the Capital Request Entry screen.*

**NOTE!** This screen will require additional information for Construction and IT requests. The next page will show the required fields for a Construction request.

### Step 3 – Complete the Capital Request Entry screen

- Type your Dept. ID and click Enter.
- Select a request category.
- Select a request type.
- Select whether the request has an operating budget impact.
- Select whether you have a technical contact working on this request.
- Enter the uniqname of the technical contact.
- Select Yes if you have capital cost detail for the project.
- Use the Help document if needed.

- Select whether you have already worked with a **technical contact** on the request.
  - Enter the **contact's uniqname** if you select Yes.
- Select whether you have the details of the **capital cost** of the project.
  - If you select No, the request becomes a Construction Investigation and Facilities will determine and enter the capital cost.
- Click "Continue with request."



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**NOTE!** If you do not change the default on the operating expenses/impact question from “No” to “Yes,” you will see a pop-up message asking you to verify this choice.

If correct, click OK.

If you wish to change the operating expenses/impact answer to “Yes,” click Cancel.

The screenshot shows the PDS2 web application interface in Microsoft Internet Explorer. The browser address bar shows the URL: <https://141.214.154.92/PDSWeb/editRequest.do>. The page title is "PDS :: Version 2.0 - Microsoft Internet Explorer". The main content area displays the "Capital Request Entry" form. The form includes a navigation menu with links for "CAPITAL REQUESTS", "MY BUDGETS", "CAPITAL BUDGETS", "CAPITAL REPORTS", and "SEARCH". The "Your Profile Information" section shows the following details: Uniqname: PDS-REQTEST, User name: pds-reqtest pds-reqtest, Phone number: (empty), Dept ID: 999997, Admin code: 90, Department manager: (empty), and AHD: JLAW. A "Click here for help!" link is also present. A "Preliminary" section contains a list of questions: "1. Which category...", "2. Which type of...", and "3. Are there operating expenses/impacts associated with this request?". The third question has a dropdown menu currently set to "No". Below the list is a "Continue with request..." link. A "Need Help?" section with a "Click here." link and "Email Capital Budget Office" is visible on the left. At the bottom of the page, the user is identified as "User : PDS-REQTEST" with a "Logout !" link. A pop-up dialog box titled "Microsoft Internet Explorer" is overlaid on the form, containing the text: "You have entered a new request without operating impacts. Are you sure you want to continue?". The dialog box has "OK" and "Cancel" buttons. Arrows point from the "OK" button to the text "Click OK if your request does not have an operating budget impact." and from the "Cancel" button to the text "Click Cancel if it does." The Windows taskbar at the bottom shows several open applications, including "Novell Gro...", "S:\MCIT\B...", "PDS\_Gloss...", "5 Micro...", "Microsoft P...", and "PDS :: Ver...". The system clock shows 3:57 PM.

**NOTE:** This will only appear if you have selected “New” as your request type.



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### Step 4 – Complete the Contact Information/Request Information screen

- Select whether or not you are the Contact of the request.
  - The Contact is the person who knows what the request is for and about.
  - The Requester may be the Contact.
- If you are not the Contact, type the Contact's unickname in the space provided.
- Click Enter.
  - The Contact's user name and phone number will appear automatically.
- Select and type a short title for the request into the space provided.
  - The title should be no more than 30 characters long.
  - The title should be identifiable with the specific request and your department.
- Enter a longer description of the request in the space provided.
  - The description must answer who, what, where, when, why and how.
  - The description may be no more than 2000 characters (~1 Word page) long.
  - **HINT:** You can copy and paste the description from a Word document into the description field (attachments are not available).
- Click "Continue with request."

- Choose whether or not you are the Contact of the Request.
- If not, enter the Contact's unickname.
- Enter a short, descriptive title for your request.
- Enter a longer description.
- Click "Continue with request."





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### Step 5 – Complete the Request Item Summary screen

**NOTE** – This screen will only appear if you selected Yes when asked if you have details on the capital cost of the project. If you did not enter capital costs but you do know the operating costs, go to **Step 7**. If you have neither capital nor operating costs to enter, go to **Step 8**.

- Enter the **Quantity** or number of items you wish to purchase.
- Enter the **Name** of the item(s).
- Enter the **Dept. ID** number.
  - This should be the Dept. ID number for the Department Manager who has the ability/authority to execute the purchase.
  - This is where the item(s) will depreciate.
  - This is often the same Dept. ID you are using to make the request.
- Select the **Building** where the item(s) will be placed in service.
- Select the **Room** number where the item(s) will be placed in service (Optional).
- Click **Save**.

**Request Item Summary:**  
To add Item Summary information to your request, make the appropriate entries in the boxes below and then click on Save. To view a sample entry, see the section below marked *Example*.

After entering an Item Summary line item, click on details for each line item to add specific information. Note: Every Item Summary must have Detail added prior to continuing with the request.

[Click here for help!](#)

Request at a glance  
[Your Profile Info](#)  
[Preliminary Request Info](#)  
[Contact Info](#)  
[Request Info](#)

Quantity	Name	Dept ID	Location	Room Number
2	Operating Room	12345	Mott	6789
1	Lobby	12345	Mott	6789

Example

User : PDS-REQTEST  
[Logout !](#)

Enter Quantity  
Enter Name of Item(s)  
Enter Dept. ID for depreciation  
Select Building  
Enter Room # (optional)  
Click save  
Once saved, the example changes to your live data.



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### Step 5 – Complete the Request Item Summary screen

- The Example will be replaced by a **Current Items** box showing the item(s) you just entered.
  - You can enter additional items in the space above.
- You must complete request details for all items added.
  - Click **details** to see the detail entry screen.
  - Click **edit** to change the request line item.
  - Click **remove** to delete the line item.

**Capital Request Entry::**  
**Request Item Summary:**  
To add Item Summary information to your request, make the appropriate entries in the boxes below and then click on Save. To view a sample entry, see the section below marked *Example*.

After entering an Item Summary line item, click on details for each line item to add specific information. Note: Every Item Summary must have Detail added prior to continuing with the request.

[Click here for help!](#)

Request at a glance  
[Your Profile Info](#)  
[Preliminary Request Info](#)  
[Contact Info](#)  
[Request Info](#)

Quantity	Name	Dept ID	Location	Room	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Location		Room			
Select Building:		<input type="text"/>	save		

**Current items:**

Quantity	Name	Dept ID	Location	Room Number	
1	Room Renovation	999997	300 N INGALLS BUILDING	123	<a href="#">details</a> <a href="#">edit</a> <a href="#">remove</a>

Capital Total: 50.00

[Continue with request...](#)

User : PDS-REQTEST  
[Logout !](#)

Annotations:  
- Enter additional items if needed (points to the form)  
- Recently entered items display (points to the table)  
- Click here to edit, remove or add detail (points to the table)

**NOTE:** You will not be able to select “Continue with request” until you have completed the details for each item.

**Step 6 – Complete the Request Item Details screen**

- Re-enter the **Item Name** (Required).
- Enter the manufacturer's **Model Number** (Optional).
- Enter the **Manufacturer's** name (Optional).
- Enter any **Notes** you wish to record about the item (Optional).
- Enter the **Quantity** of the item you wish to order (Required).
- Enter the **Unit Cost** (Required).
- Click **save**.

**Request Item Details:**

Item Name	Model Number	Manufacturer	Notes	Quantity	Unit Cost	Expense Category	
						UNKNOWN	save

*Example*

Item Name	Model Number	Manufacturer	Notes	Quantity	Unit Cost
Refrigerators	1234-56789	Freeze-All, Inc.	Current ones are broken -- We need these ASAP	5	\$1500

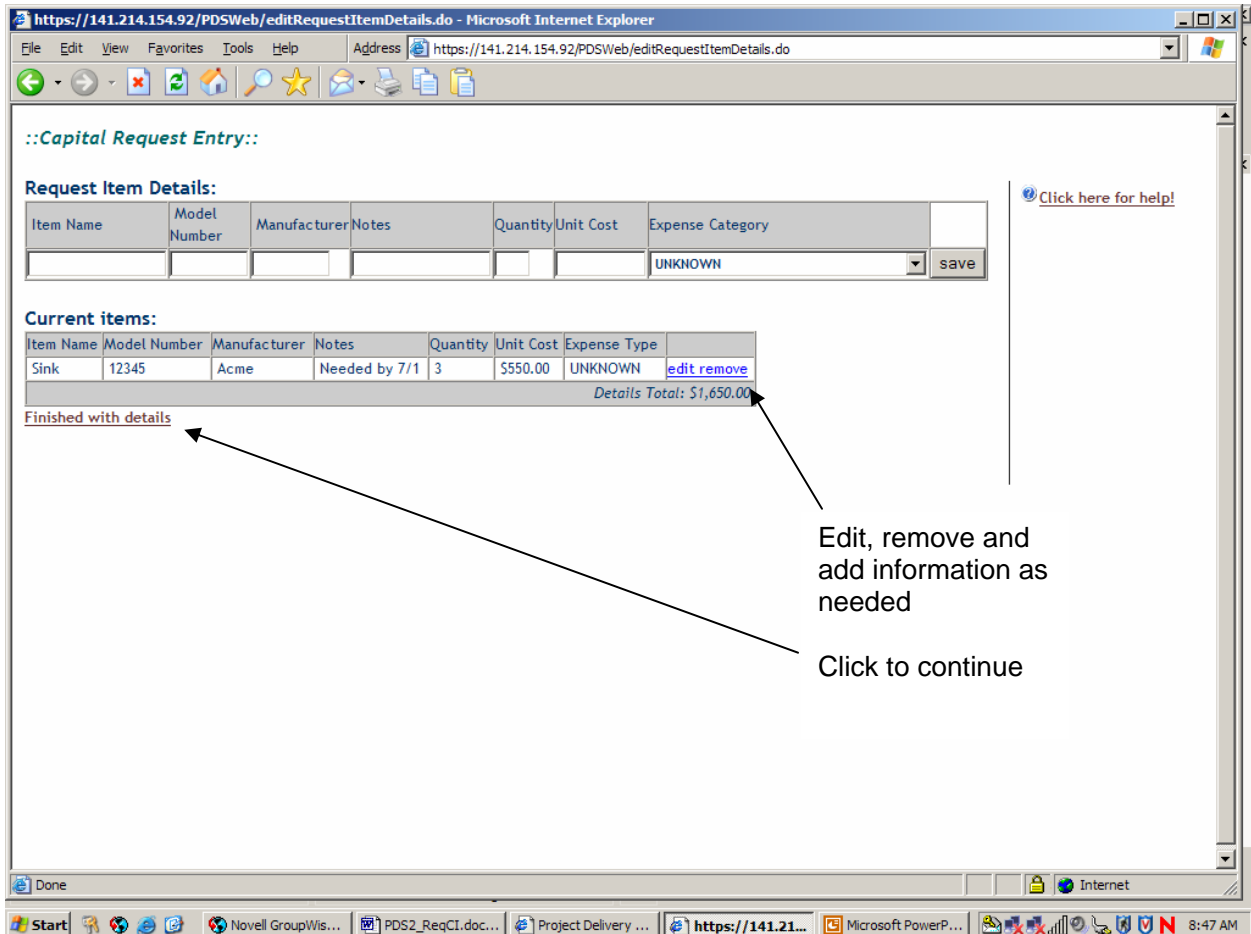
Design Manager completes this section

1. Complete all request detail
2. Click save

**NOTE:** When entering data into number fields, you may only use numbers and decimals; commas, symbols and letters are not permitted.

**Step 6 – Complete the Request Item Details screen**

- The information you entered will now appear under **Current Items**.
- You can **edit** or **remove** the information if needed.
- You can **add** details if needed.
- Click **Finished with details** when finished.



- You will be taken back to the **Request Item Summary** screen.
- Click "Continue with request" at the bottom of the screen.



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**NOTE!** If you selected Yes for Operating Impact, you will now be asked to complete the Operating Expenses screen; if not, go to **Step 8**.

### Step 7 – Complete the Operating Expenses screen

- Enter the operating **Impact Type**:
  - Revenue
  - FTE
  - Commodity (NOTE: Use this category for maintenance; reference “maintenance” in description.)
  - Other Expenses
  - NOTE: You can enter as many and reuse Impact Type categories as needed.
- Enter the dollar **Amount** for each impact type.
- Enter the operating budget **Admin Code** where the operating impact will hit.
- Enter a **Description** of the impact.
- Enter the **Effective Date** (and **Effective End Date** if applicable) of the impact.
  - Use the calendar icon to the right of the data entry field to select a precise date.
- Click **Save**.
- Your entries will appear in the summary on the bottom of the screen. Subtotals and total will update automatically.
- Repeat this process to add additional impacts as needed.
- Click **Continue with request** when finished.

**Operating Expenses:**

Impact Type	Revenue
Amount	
Admin Code	100- MWORKS ADMINISTRATION
Description	
Effective Date	
<input type="button" value="Save"/>	

**Summary:**

Revenue Impact	
FTE Impact	Subtotal: \$0.00
Commodity Impact	Subtotal: \$0.00
Other Expenses Impact	Subtotal: \$0.00
Revenue Impact Total: \$0.00	
Operating Expenses Total: \$0.00	

[Continue with request...](#)

- Enter the detail of the operating impact.
- Click Save.
- Repeat for as many line items as required.
- View and verify detail.
- Click on down arrows to expand to see detailed line items.
- Click here to Continue with request.



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### Step 8 – Complete the Request Verification screen

- If you entered capital amounts, they will appear at the top of this screen.
- Click the down arrow to expand each section and view the detail entered.
- **Review** the request detail in each section to ensure accuracy.
- Edit the request if needed by clicking on **Edit this request**.
  - Selecting Edit this request will take you back through all data entry screens.
- Confirm the request when ready by clicking on **Confirm this request**.

The screenshot shows the PDS2 web application interface. The browser title is "PDS :: Version 2.0 - Microsoft Internet Explorer". The address bar shows the URL: <https://webappstest.med.umich.edu/PDSWeb/verifyRequest.do?dispatch=begin&requestId=24880>. The page content includes a navigation menu with "CAPITAL REQUESTS", "MY BUDGETS", "CAPITAL BUDGETS", "CAPITAL REPORTS", and "SEARCH". The main content area is titled "Capital Request Entry" and "Request Verification". It displays the following summary:

- Capital Cost Total: \$0.00
- Operating Expenses Total: \$0.00
- Revenue Impact Total: \$0.00

Below the summary are three expandable sections: "Profile Info", "Preliminary Request Info", and "Request Info". Each section has a down arrow on its right side. To the right of these sections is a link: "Click here for help!". At the bottom of the main content area are two buttons: "Edit this request..." and "Confirm this request...".

Annotations on the screenshot include:

- Arrows pointing from the text "Click the down arrow to expand each section (Click the up arrow to close the section) Review each section for accuracy" to the down arrows on the three sections.
- Arrows pointing from the text "Edit the request if necessary Confirm the request when confirmation and corrections are complete" to the "Edit this request..." and "Confirm this request..." buttons.

**NOTE:** If you leave the request screen at this time, it is saved in your PDS2 work list. It will not go forward to the next level of approval until you select "Confirm this request."



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### Request Complete!

- The **Request Tracking Number** (RTN) now appears on the screen.
- You can **Enter Another Request** from this screen.
- You can **View** the Request.
- You can **Edit** the Request.
- **Log out** when finished.

The screenshot shows a web browser window titled "PDS :: Version 2.0 - Microsoft Internet Explorer". The address bar shows "https://141.214.154.92/PDSWeb/verifyRequest.do". The page content includes a navigation menu with "CAPITAL REQUESTS", "MY BUDGETS", "CAPITAL BUDGETS", "CAPITAL REPORTS", and "SEARCH". The main content area is titled "Capital Request Entry" and "Request Confirmation". It states: "To track this request action, use the Request Tracking Number. The system now has processed your request." The Request Tracking Number is displayed as "2569632". Below this, it says "Prior to becoming an approved capital budget, your request must pass through..." followed by "Technival Validation Committee approval (if applicable)" and "\*\* Capital Budget Office approval". There are three links: "Enter Another Request", "View This Request", and "Edit This Request". A note at the bottom says "\*Use the View This Request link to view a printable version of the Request." In the bottom left corner, it says "User : PDS-REQTEST" and "Logout !". On the right side of the screenshot, there is a list of instructions with arrows pointing to the corresponding elements on the page:

- Your request is assigned a tracking number (points to the RTN)
- You can Enter Another Request or (points to the "Enter Another Request" link)
- View or Edit the current request (points to the "View This Request" and "Edit This Request" links)
- Click Logout when finished (points to the "Logout !" link)

**NOTE!** You have completed the initial data entry of the request only. The RTN must now go through several review and approval steps.

- The RTN is now in the Department Manager's **Requests Needing Approval** list.
  - If you did not enter capital cost information (Step 3), the request will go to Facilities for investigation and assignment of staff after going to the Department Manager and AHD for initial approval; the request will go back to the Department Manager and AHD for funding source and approval once costs have been determined by the Facilities Design Manager.
- See the section on **Approving a Request** for more information on Next Steps.