USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

REQUESTING CAPITAL PROJECT/EQUIPMENT 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 **equipment** purchase.

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

1. Construction
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.

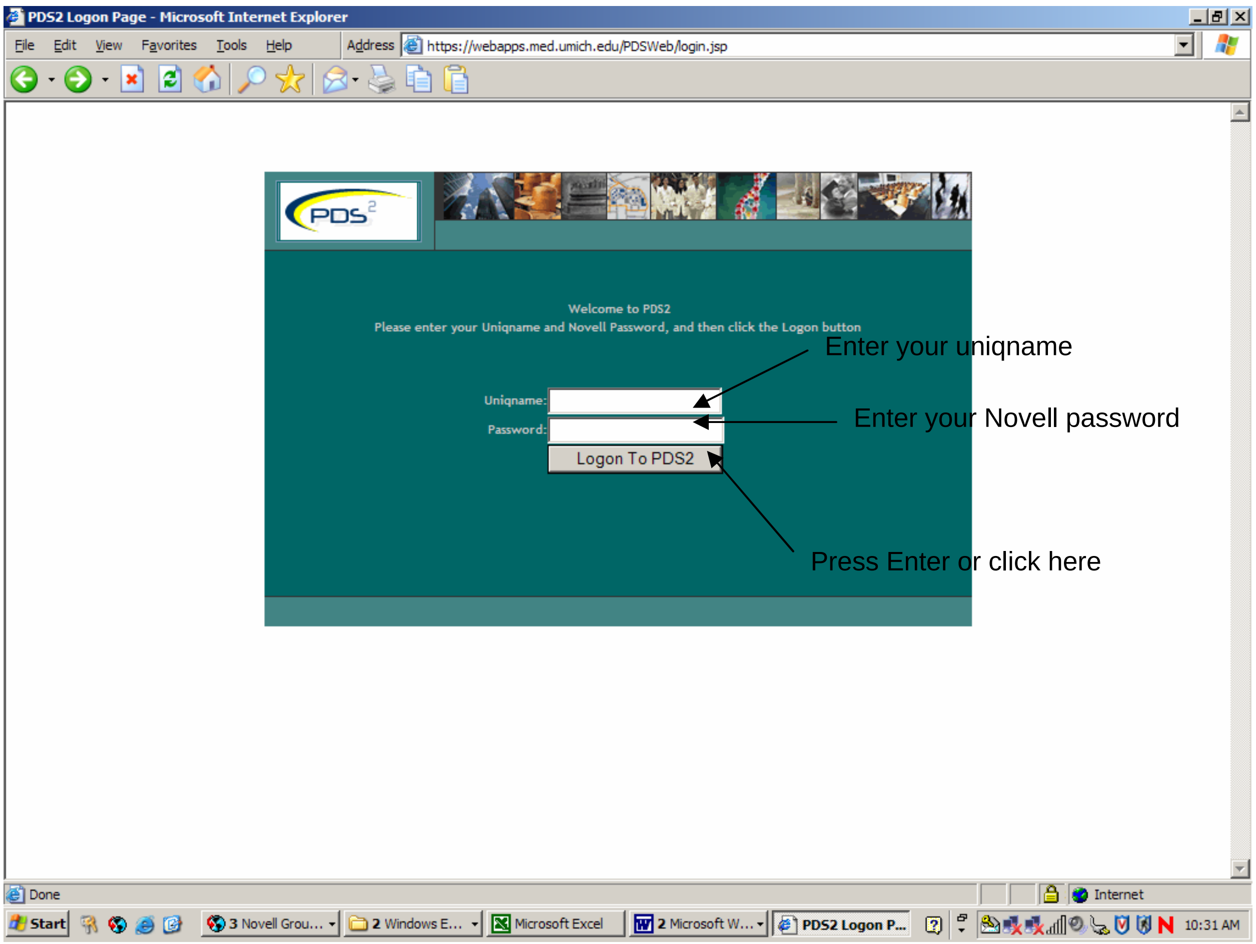
Each category and type of request requires a different set of steps in PDS2. This document will outline the various steps by request category and type as well as added steps for those requests that impact the operating budget.

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.

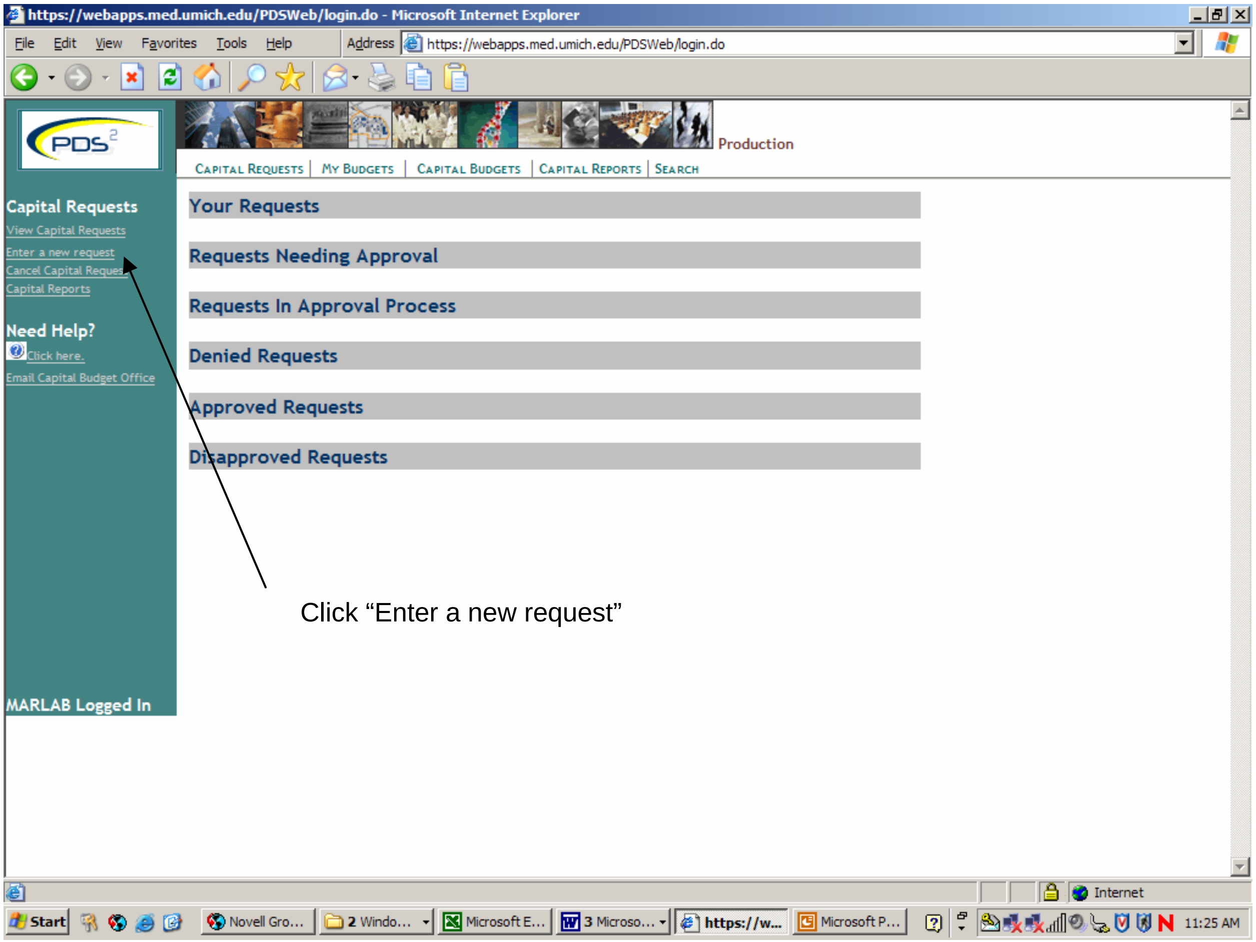
Step 1 – Log in to PDS2

- 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.
    - o Call the MCIT Help Desk at 936-8000 if you need assistance with your uniqname or Novell password.



Step 2 – Start a New Request

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



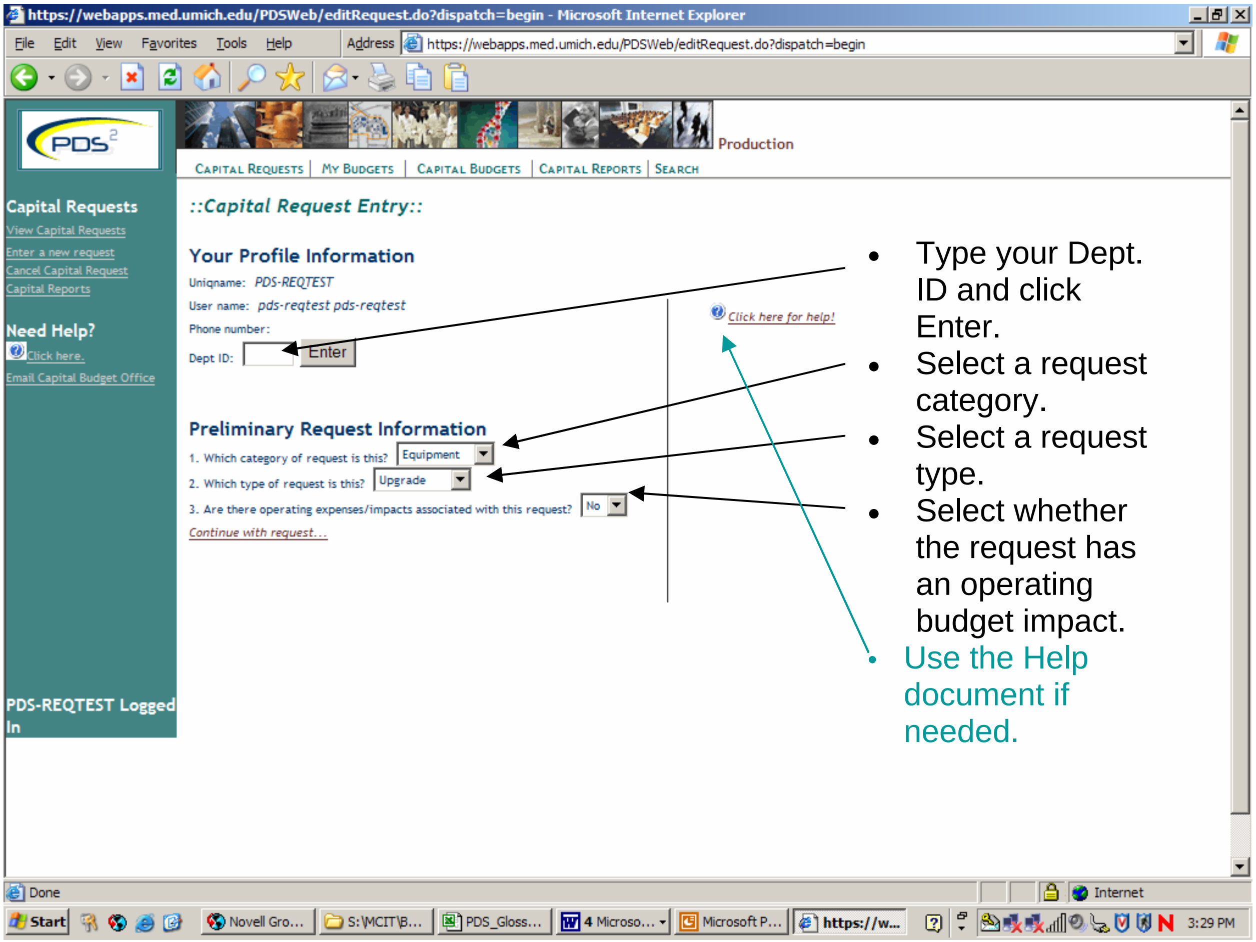
Step 3 – Complete the Capital Request Entry screen

- 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.
  - **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 an Equipment request.
- Select a **request type**:
  - **New** – use this type for items that will not be replacing or upgrading something that already exists.
  - **Replacement** – use this type for items that will replace something existing (typically used for tangible assets).
  - **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).
- 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 you wish to purchase 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?
    - Etc.

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. See the job aids for Construction and IT requests for more information.

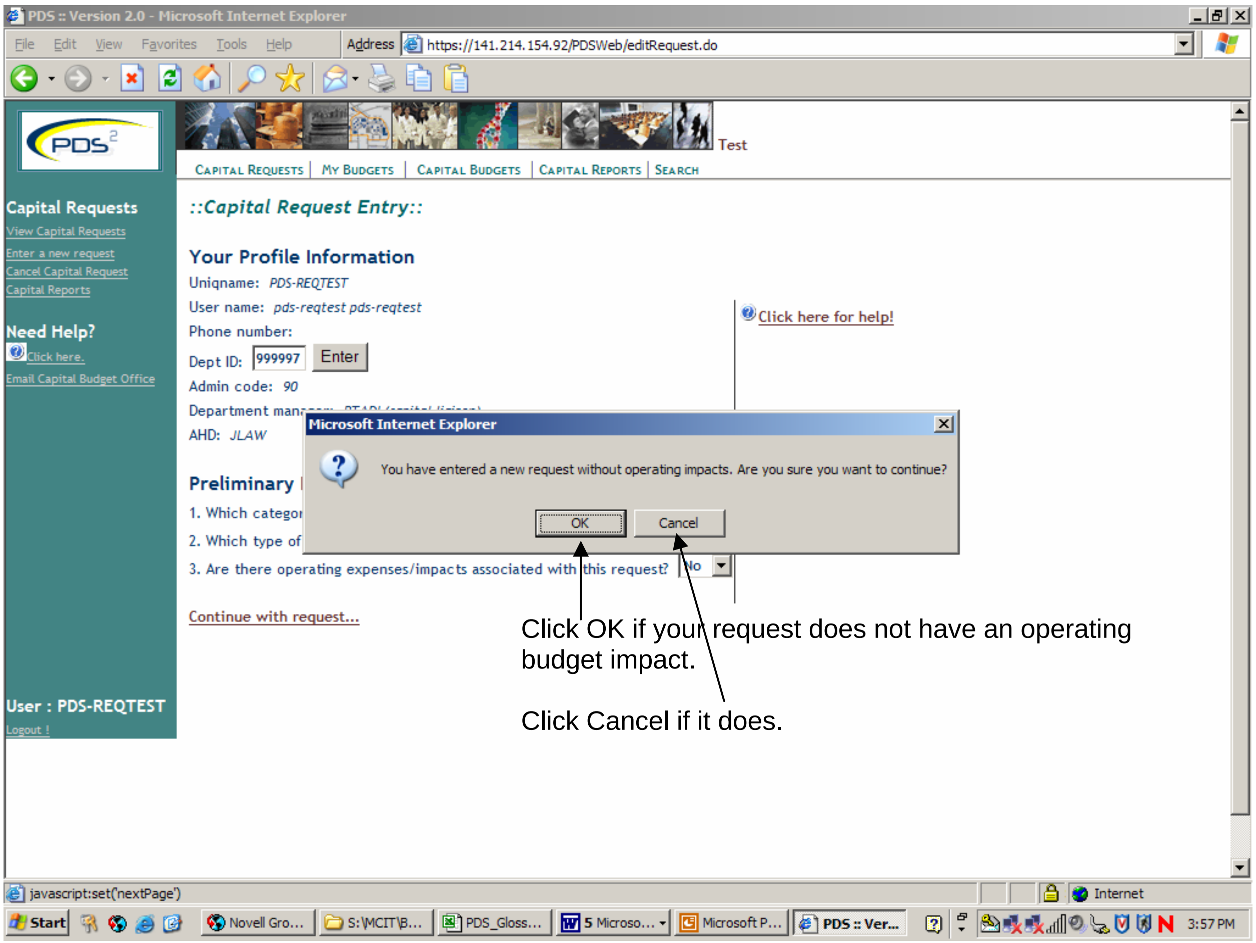
Step 3 – Complete the Capital Request Entry screen



- Type your Dept. ID and click Enter.
- Select a request category.
- Select a request type.
- Select whether the request has an operating budget impact.
- Use the Help document if needed.

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.

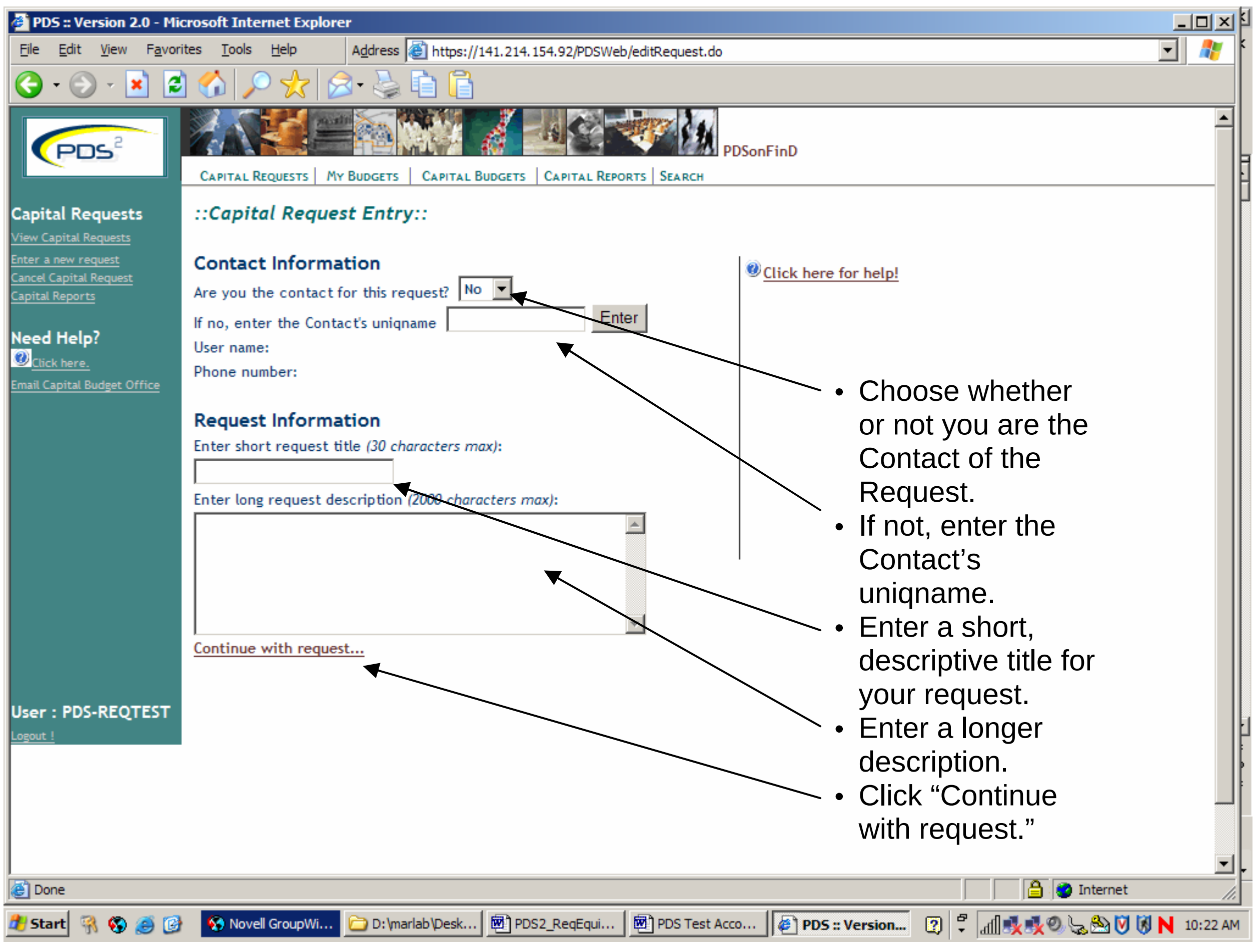
If correct, click OK.
If you wish to change the operating expenses/impact answer to "Yes," click Cancel.



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

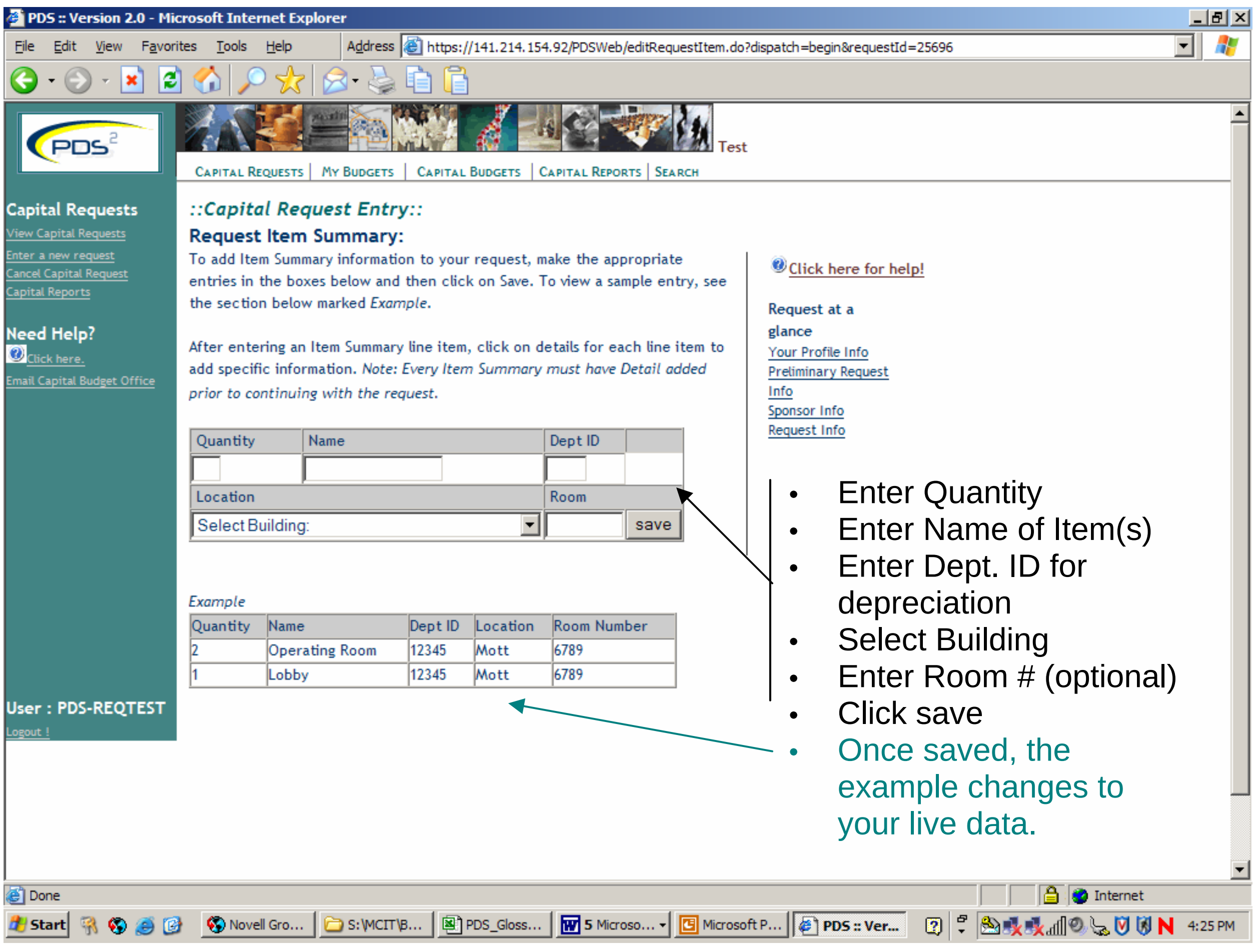
Step 4 – Complete the Contact Information/Request Information screen

- 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 uniqname 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."



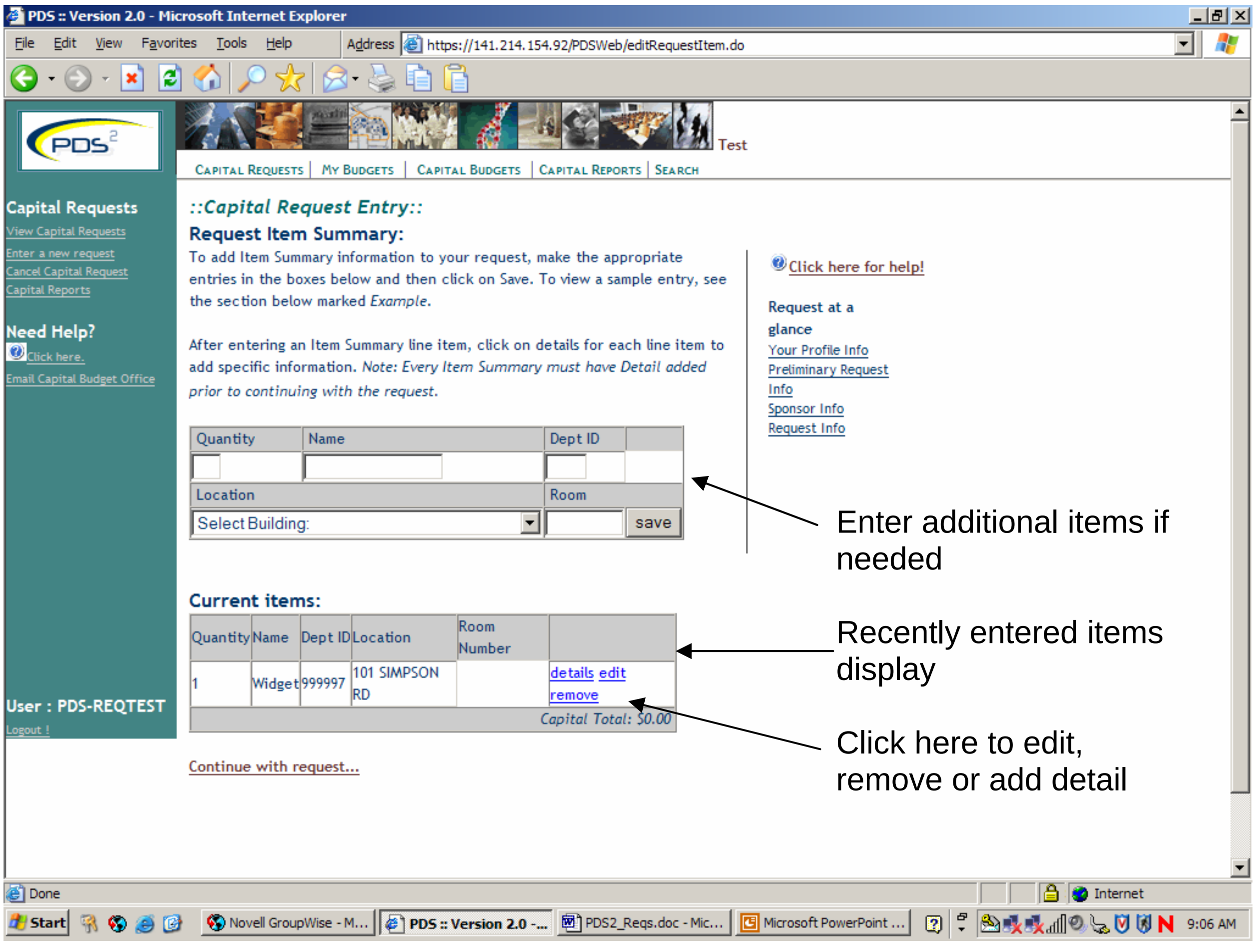
Step 5 – Complete the Request Item Summary screen

- 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**.



Step 5 – Complete the Request Item Summary screen

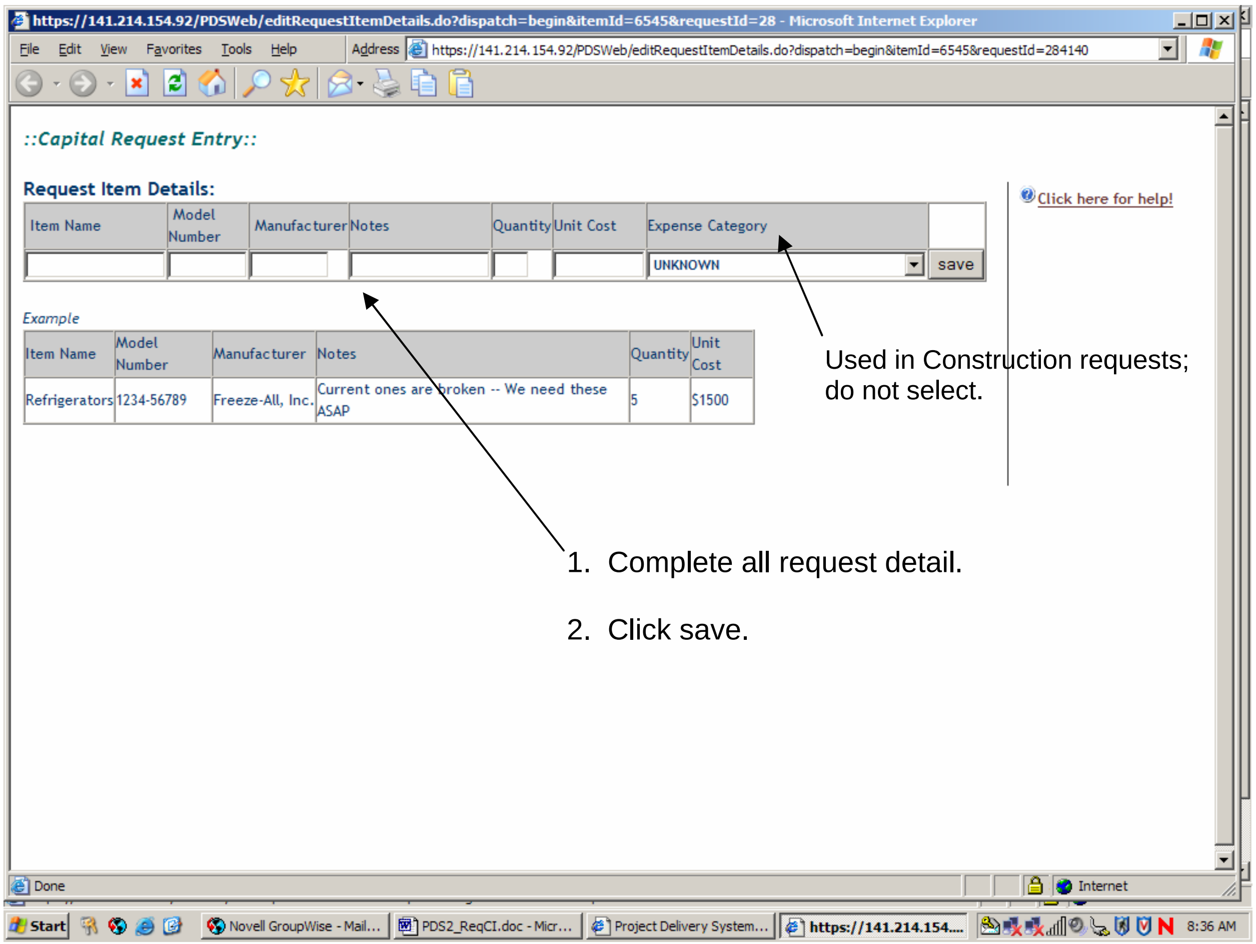
- The Example will be replaced by a **Current Items** box showing the item(s) you just entered.
  - You can enter additional items in the space above.
- You must complete request details for all items added.
  - Click **details** to see the detail entry screen.
  - Click **edit** to change the request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



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

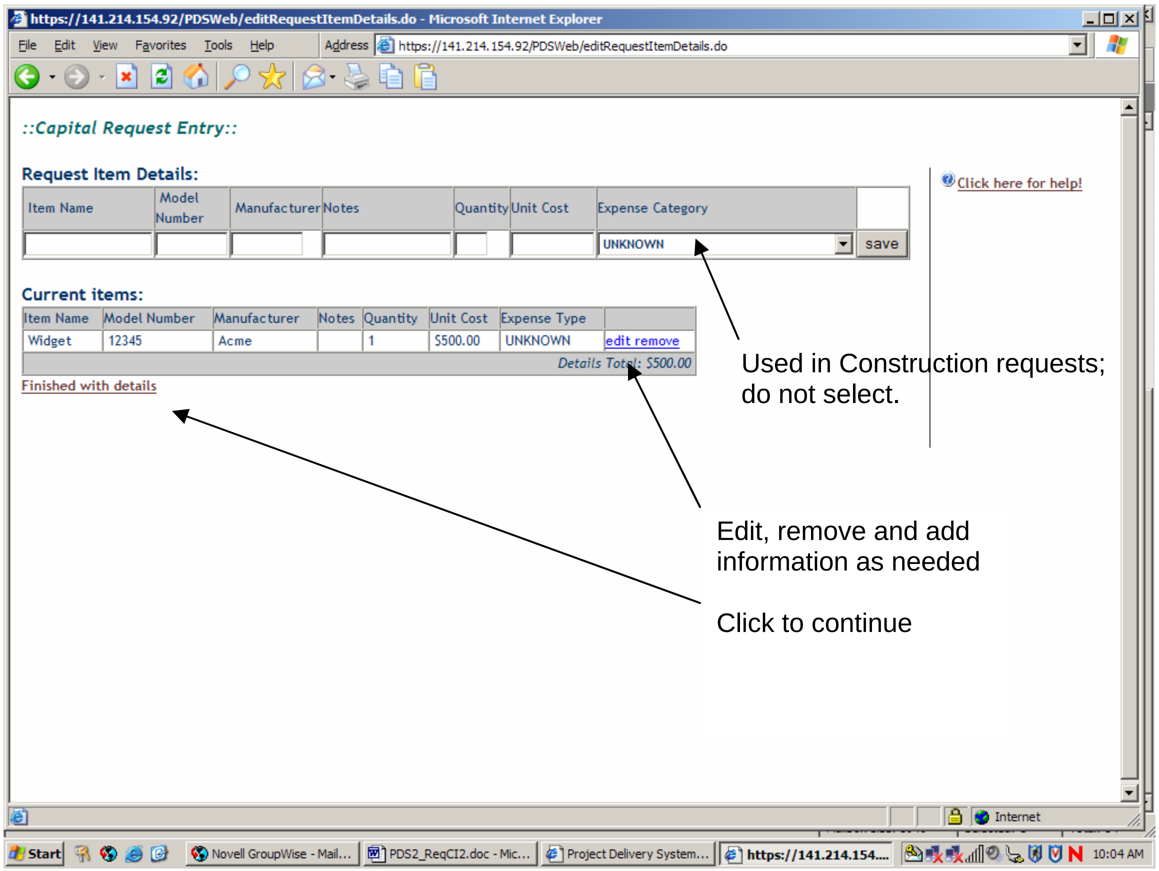
- Re-enter the **Item Name** (Required).
- Enter the manufacturer's **Model Number** (Optional).
- Enter the **Manufacturer**'s name (Optional).
- Enter any **Notes** you wish to record about the item (Optional).
- Enter the **Quantity** of the item you wish to order (Required).
- Enter the **Unit Cost**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



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.

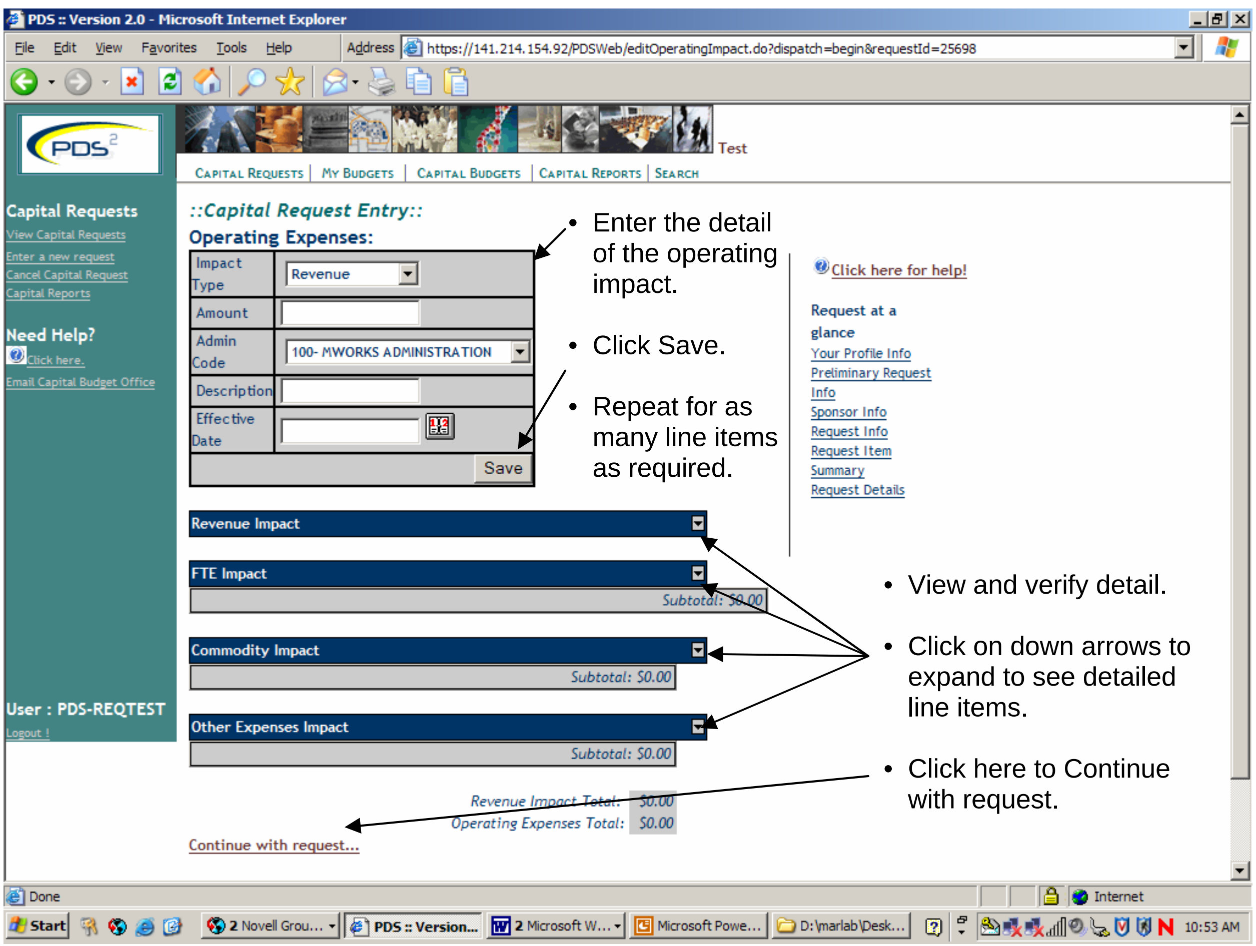


- You will be taken back to the **Request Item Summary** screen.
- Click **Continue with request** at the bottom of the screen.

NOTE! If you selected Yes for Operating Impact, you will now be asked to complete the Operating Expenses screen.

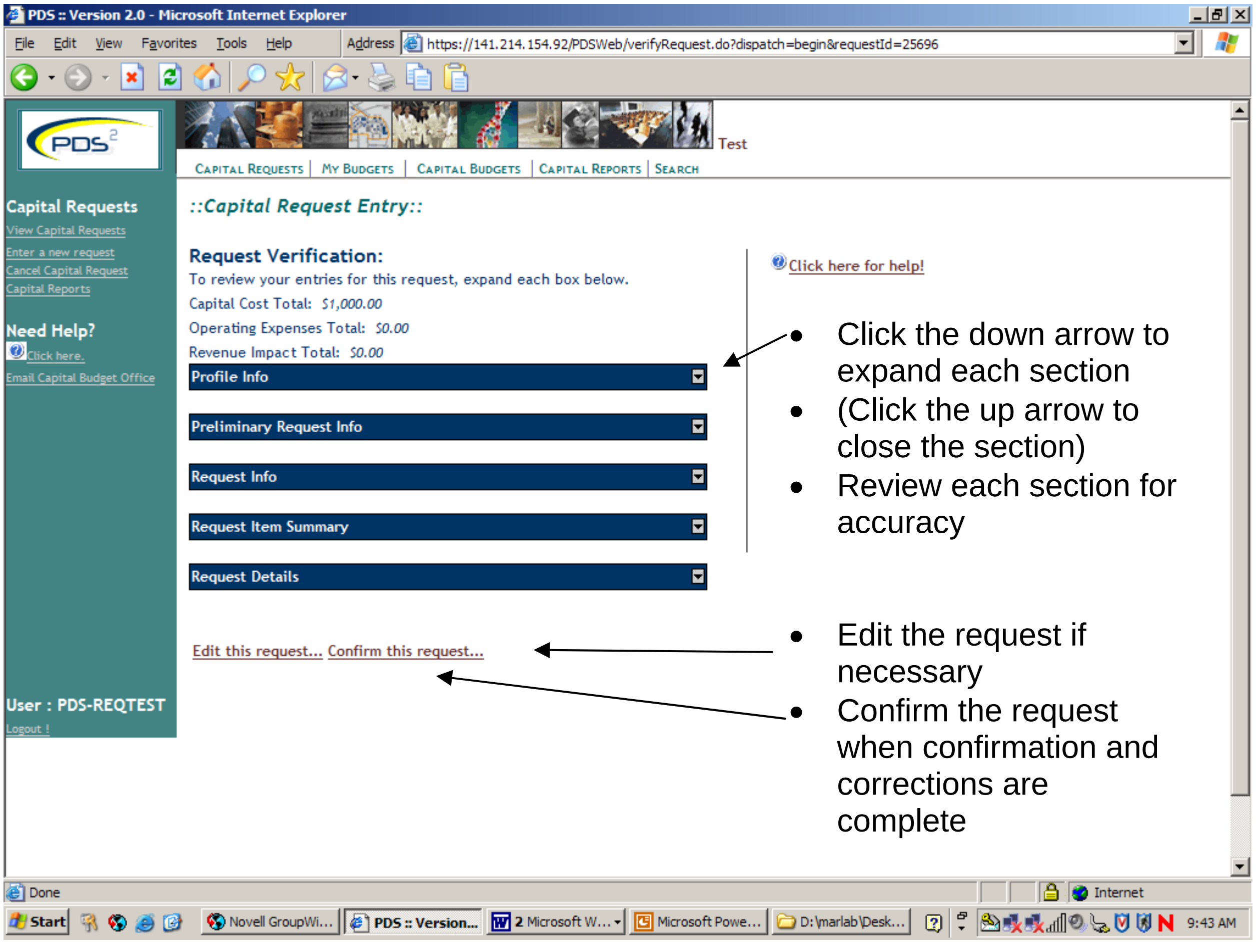
Step 6a – Complete the Operating Expenses screen

- 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.



Step 7 – Complete the Request Verification screen

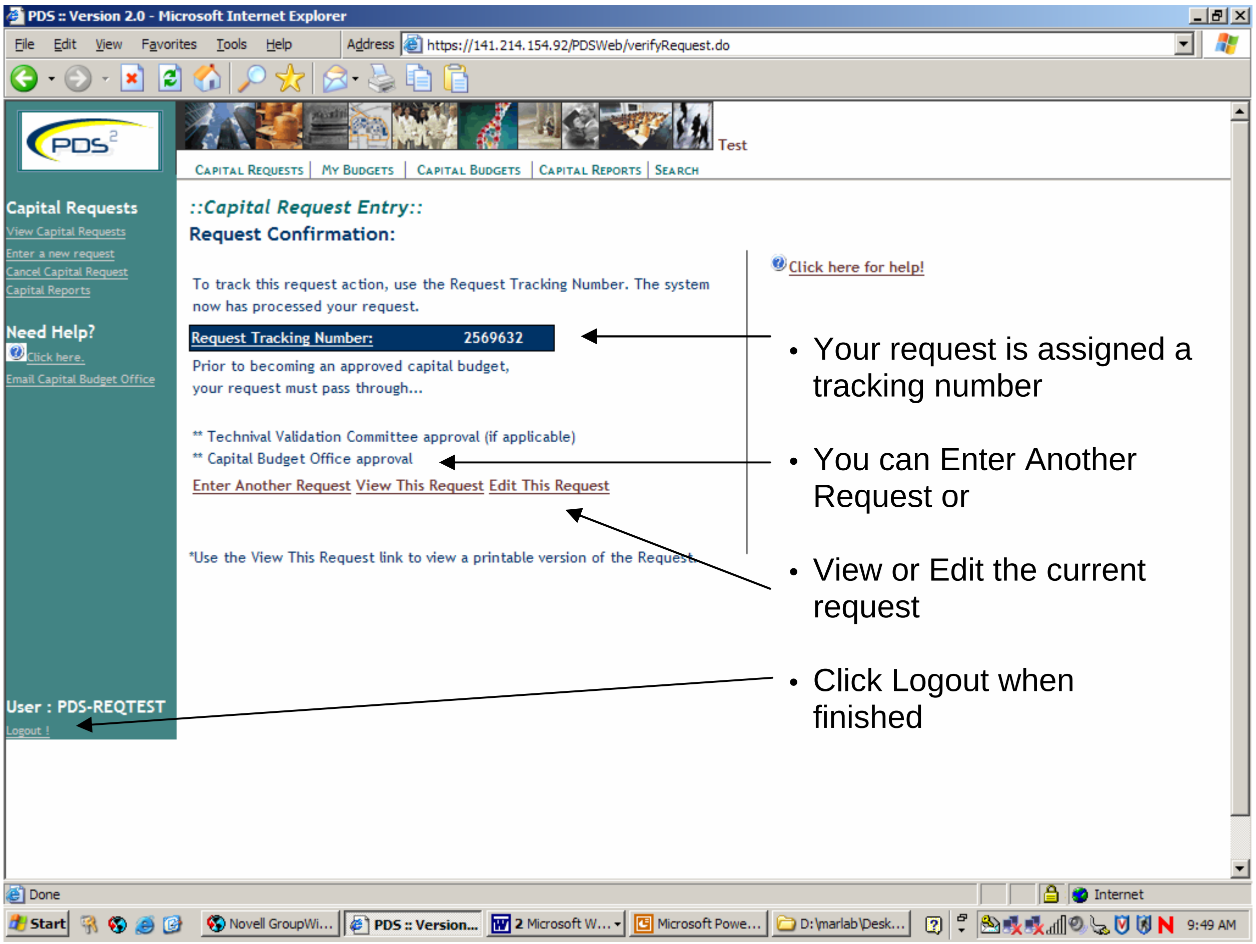
- Click the down arrow to expand each section.
- **Review** the request detail in each section to ensure accuracy.
- Edit the request if needed by clicking on **Edit this request**.
    - Selecting Edit this request will take you back through all data entry screens.
- Confirm the request when ready by clicking on **Confirm this request**.



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."

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.



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.
- See the section on **Approving a Request** for more information on Next Steps.