



## 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

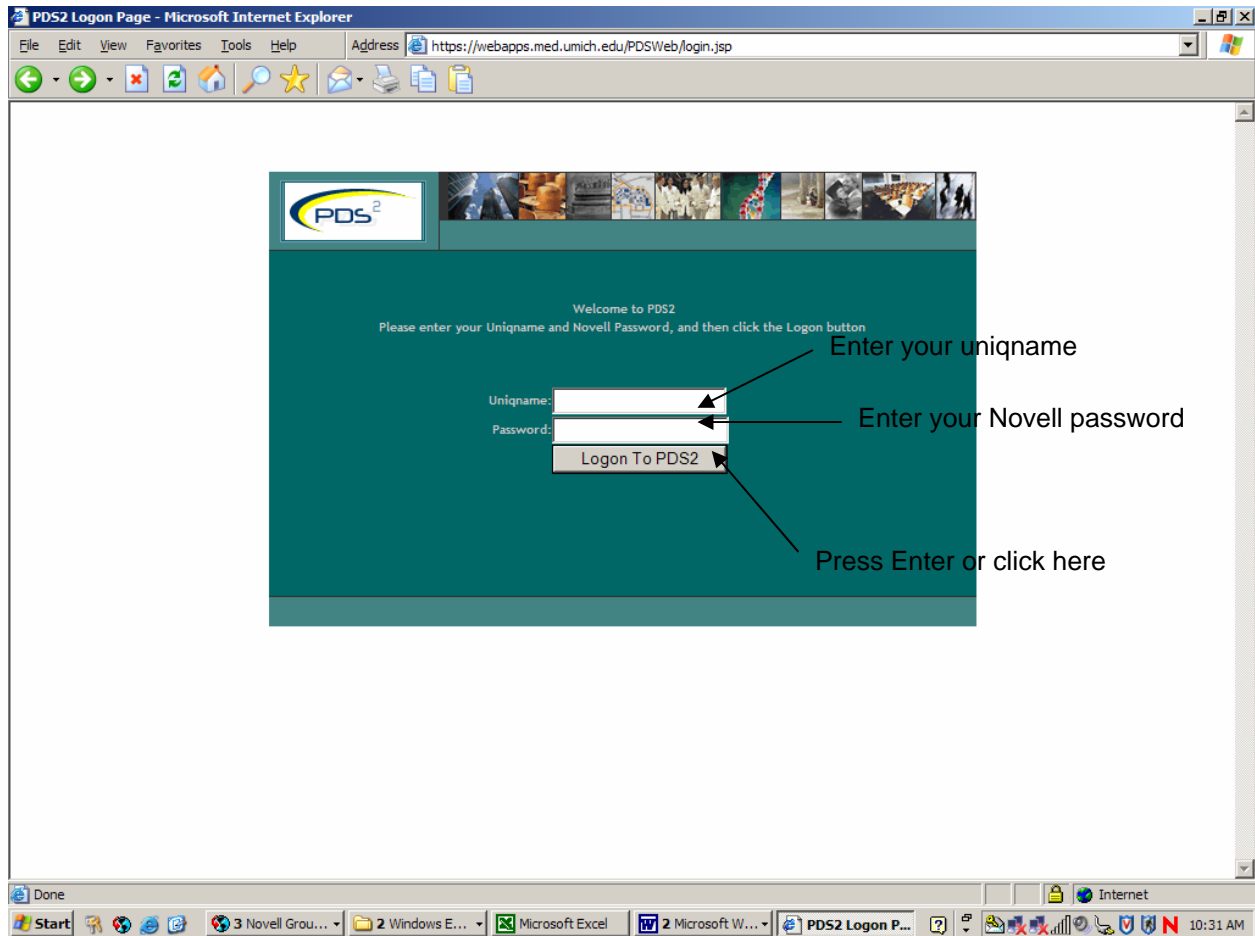
The next few pages will show you how to log in to the system, select a new request, and fill out key information.



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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”



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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.



# USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

## Step 3 – Complete the Capital Request Entry screen

**::Capital Request Entry:**

**Your Profile Information**

Uniqname: PDS-REQTEST  
User name: pds-reqtest pds-reqtest  
Phone number:  
Dept ID:

**Preliminary Request Information**

1. Which category of request is this?   
2. Which type of request is this?   
3. Are there operating expenses/impacts associated with this request?   
[Continue with request...](#)

[Click here for help!](#)

- 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.



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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 displays the PDS2 web interface in Microsoft Internet Explorer. The main content area is titled "Capital Request Entry" and includes a "Your Profile Information" section with fields for Uniqname, User name, Phone number, Dept ID (999997), Admin code (90), Department manager, and AHD (JLAW). A "Preliminary" section contains a list of questions, with the third question, "Are there operating expenses/impacts associated with this request?", set to "No". A "Continue with request..." link is visible below. A "Need Help?" section is on the left. A "Microsoft Internet Explorer" dialog box is overlaid on the page, asking "You have entered a new request without operating impacts. Are you sure you want to continue?" with "OK" and "Cancel" buttons. Arrows from the text below point to these buttons.

Click OK if your request does not have an operating budget impact.

Click Cancel if it does.

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



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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."

The screenshot shows a web browser window with the URL <https://141.214.154.92/PDSWeb/editRequest.do>. The page title is "PDS2 - Version 2.0 - Microsoft Internet Explorer". The main content area is titled "Capital Request Entry" and contains the following sections:

- Contact Information:** A dropdown menu with "No" selected, a text input field for "Contact's unickname", and an "Enter" button.
- Request Information:** A text input field for "short request title (30 characters max)", a larger text area for "long request description (2000 characters max)", and a "Continue with request..." link.

On the right side of the form, there are four bullet points with arrows pointing to the form fields:

- 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."

The bottom of the browser window shows the Windows taskbar with the Start button, several open applications (Novell GroupWi..., D:\marlab\Desk..., PDS2\_ReqEqui..., PDS Test Acco..., PDS2 - Version...), and the system tray showing the time as 10:22 AM.



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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**.

**Capital Requests**  
View Capital Requests  
Enter a new request  
Cancel Capital Request  
Capital Reports

**Need Help?**  
Click here.  
Email Capital Budget Office

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

**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.*

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

**Example**

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

- 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 Requests**  
View Capital Requests  
Enter a new request  
Cancel Capital Request  
Capital Reports

**Need Help?**  
Click here.  
Email Capital Budget Office

**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](#)  
[Sponsor Info](#)  
[Request Info](#)

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

**Current items:**

Quantity	Name	Dept ID	Location	Room Number	
1	Widget	999997	101 SIMPSON RD		<a href="#">details</a> <a href="#">edit</a> <a href="#">remove</a>

Capital Total: 50.00

[Continue with request...](#)

User : PDS-REQTEST  
Logout !

Done

Start | Novell GroupWise - M... | PDS :: Version 2.0 ... | PDS2\_Reqs.doc - Mic... | Microsoft PowerPoint ... | 9:06 AM

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

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### 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

*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

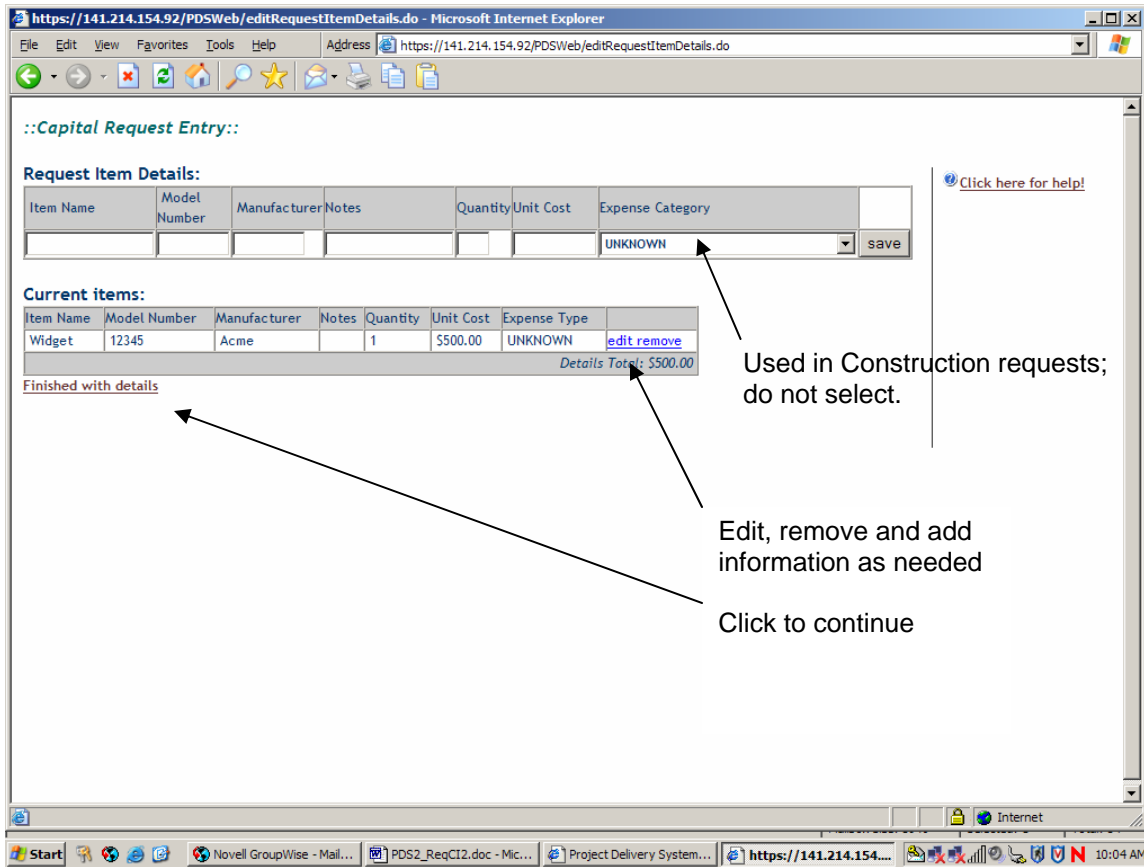
1. Complete all request detail.  
2. Click save.

Used in Construction requests; do not select.

**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.

### 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.

**Operating Expenses:**

Impact Type	Revenue
Amount	
Admin Code	100- MWORKS ADMINISTRATION
Description	
Effective Date	
Effective End Date	
Save	

**Summary:**

Revenue Impact	Subtotal: \$0.00
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...](#)

[Click here for help!](#)

[Request at a glance](#)

[Your Profile Info](#)

[Preliminary Request Info](#)

[Sponsor Info](#)

[Request Info](#)

[Request Item Summary](#)

[Request Details](#)



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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**.

The screenshot shows the PDS2 web application interface. The main content area is titled "Request Verification" and contains the following text: "To review your entries for this request, expand each box below." Below this, there are summary statistics: "Capital Cost Total: \$1,000.00", "Operating Expenses Total: \$0.00", and "Revenue Impact Total: \$0.00". A list of sections follows, each with a dropdown arrow: "Profile Info", "Preliminary Request Info", "Request Info", "Request Item Summary", and "Request Details". At the bottom of the main content area, there are two links: "Edit this request..." and "Confirm this request...". A "Click here for help!" link is located to the right of the sections list. The left sidebar contains navigation links for "Capital Requests", "My Budgets", "Capital Budgets", "Capital Reports", and "Search". The user is identified as "User : PDS-REQTEST".

- Click the down arrow to expand each section
- (Click the up arrow to close the section)
- Review each section for accuracy
- Edit the request if necessary
- Confirm the request when confirmation and corrections are complete

**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."



## USING PDS2 – SUBMITTING REQUESTS – EQUIPMENT

### 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.

**Request Confirmation:**

To track this request action, use the Request Tracking Number. The system now has processed your request.

**Request Tracking Number:** 2569632

Prior to becoming an approved capital budget, your request must pass through...

\*\* Technival Validation Committee approval (if applicable)  
\*\* Capital Budget Office approval

[Enter Another Request](#) [View This Request](#) [Edit This Request](#)

\*Use the View This Request link to view a printable version of the Request

[Click here for help!](#)

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

- Your request is assigned a tracking number
- You can Enter Another Request or
- View or Edit the current request
- Click Logout 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.