



# USING PDS2 – AN INTRODUCTION

## WHAT IS PDS2?

PDS2 stands for Project Delivery System – version 2. It is a web-based application that primarily manages capital budgets down to a project by project level of detail. It provides the following functionality:

- **Capital Request** – a formal request for existing capital funds be allocated to a specific capital project or equipment purchase.
- **Program Change** – a request to move (reallocate) funds from one project to another.
- **Approvals** – automates the funding approval process through multiple levels of review and sign-off.
- **Reports** – provides status reporting on budget transactions including commitments and expenditures.
- **Capital Budget Management** – includes program change, changing budget status, adding resources to a budget and adding comments to a budget.

## WHO USES PDS2?

Anyone with a UMHC username and Novell password can use PDS2. There are roles performed by different types of PDS2 users:

- **Requester** – anyone requesting capital funding for a project or equipment.
- **Department Manager** – the person responsible for the funding allocated to a specific department. The Department Manager may choose to assign a request to the AHD for review.
- **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 for the capital investment. The AHD also approves Construction Investigation requests.
- **Technical Reviewers** – these formalized groups or individuals (information technology specialists, designers, architects) ensure that the funding requests incorporates all necessary technical requirements based on the scope of the project/request.
- **CBO (Capital Budget Office)** – staff responsible for final review of project requests and PDS2 system administration.

## HOW ARE PROJECTS/CAPITAL ACCOUNTS TRACKED IN PDS2?

Each project or equipment request is assigned an **RTN** or Request Tracking Number, until the funding allocation request has been approved. Once approved, the allocation receives a **CBN**, or Capital Budget Number. From this point on, the CBN is used to refer to the project/account.

## HOW DO I REQUEST CAPITAL FUNDS USING PDS2?

The UMHC has a formal, annual capital funding request process which typically begins in October and is usually completed by May. This process establishes the department's above threshold (>\$300k) projects to be executed in the next Fiscal Year as well as below threshold allocations for the next Fiscal Year. The department's below threshold allocation is a source of funding for capital items costing less than \$300k that departments may want to purchase throughout the year.

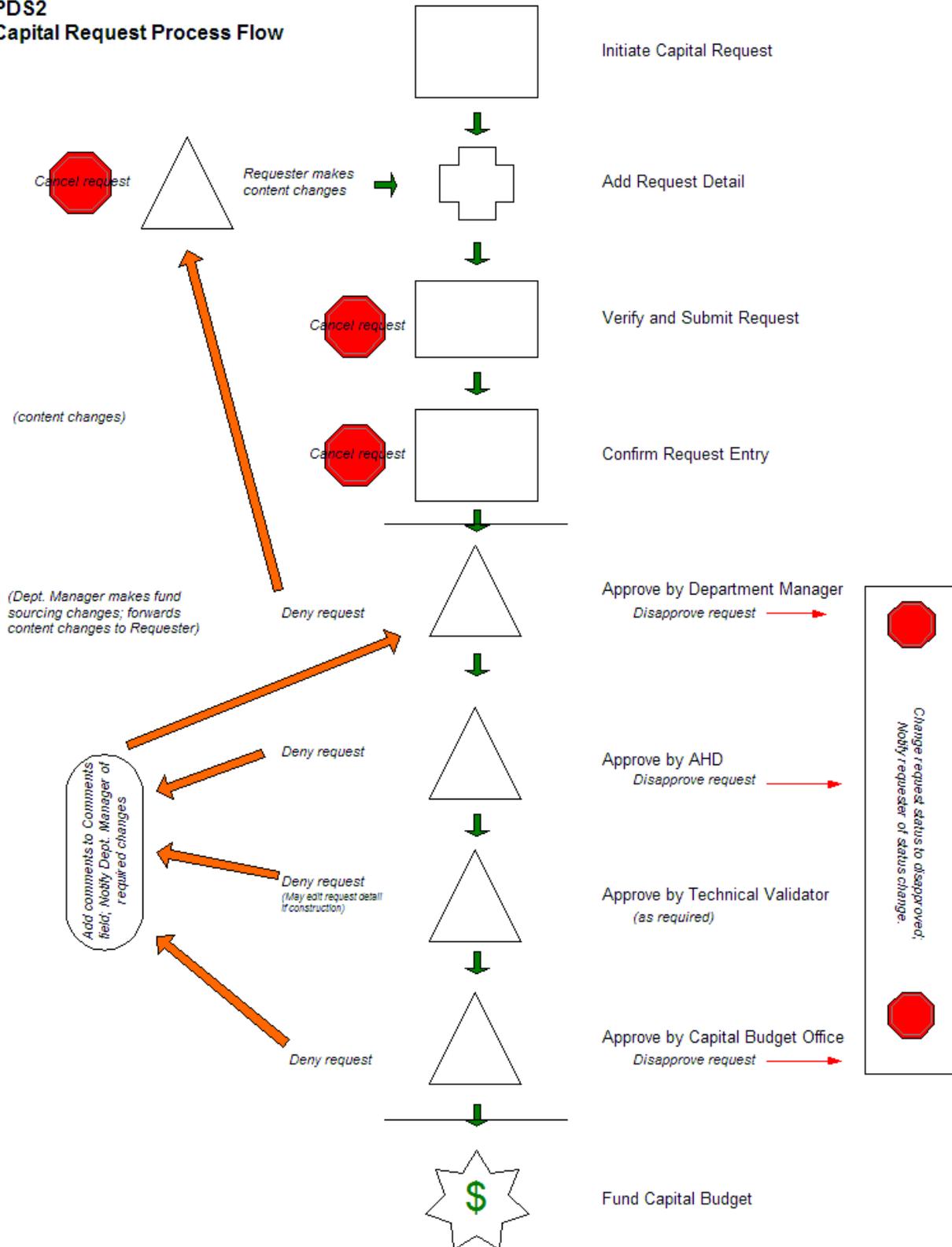
Once your department has been allocated capital funds, you must still request that they be allocated to a specific project, or set up in a specific project budget, in PDS2. These requests may be made at any time throughout the year. Large projects which are funded at \$300k or higher (above threshold projects) will be automatically entered into PDS2 by the CBO and can only be requested during the annual capital funding request process. See the section on [Requesting Capital Project/Equipment Funding](#) for more information.

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## WHAT HAPPENS TO MY REQUEST AFTER I ENTER IT INTO PDS2?

The following flow chart explains the capital request process flow in PDS2.

### PDS2 Capital Request Process Flow





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## THE PDS2 PROCESS (The Flow Chart Explained)

1. The **Requester initiates a request** for capital funds allocation in PDS2.
  - The Requester may make content changes to the request.
  - The Requester may cancel the request.
2. The **Requester verifies and submits** the request.
3. The **Requester confirms** the request entry.
  - The requester may cancel the request entry.
4. The **Department Manager reviews** the request.
  - The Department Manager may fund the request.
  - The Department Manager may disapprove the request.
  - The Department Manager may deny it (ask the Requestor to make changes).
    - The Department Manager denies the request.
    - The Department Manager documents the required changes in the Comments section of the denial.
    - The system places the denied request with comments on the requester's PDS2 work list and notifies the requester of the denial by email.
5. The **AHD reviews** the request.
  - If it is \$150k or over.
  - If request is for use of AHD controlled funds.
  - If the Department Manager requests AHD review.
  - If the request is for Construction Investigation.
6. The **AHD takes action** on the request.
  - The AHD may approve the request.
  - The AHD may disapprove the request.
  - The AHD can deny it back to the Department Manager for changes.
    - The Department Manager **MUST DENY** the request back to the requester for changes or the Department Manager may disapprove it.
7. The appropriate area performs a **technical validation**.
  - Construction
  - Interior Design
  - IT
8. The **Technical Validator verifies or enters detailed cost information** on the request
  - The Technical Validator will enter the request detail if it is a construction investigation or interior design request.
  - The Technical Validator notifies the Department Manager of required changes through the denial process.
    - The Department Manager denies the request and the request goes back to the requester for changes or cancellation (see step 4).
9. The **Capital Budget Office reviews** the request.
  - The Capital Budget Office can disapprove the request.
  - The Capital Budget Office can approve the request.
  - The Capital Budget Office can deny back to the Department Manager for changes.



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- The Department Manager denies the request and the request goes back to the requester for changes or cancellation.

### **10. If the Capital Budget Office approves the request, the project is funded!**

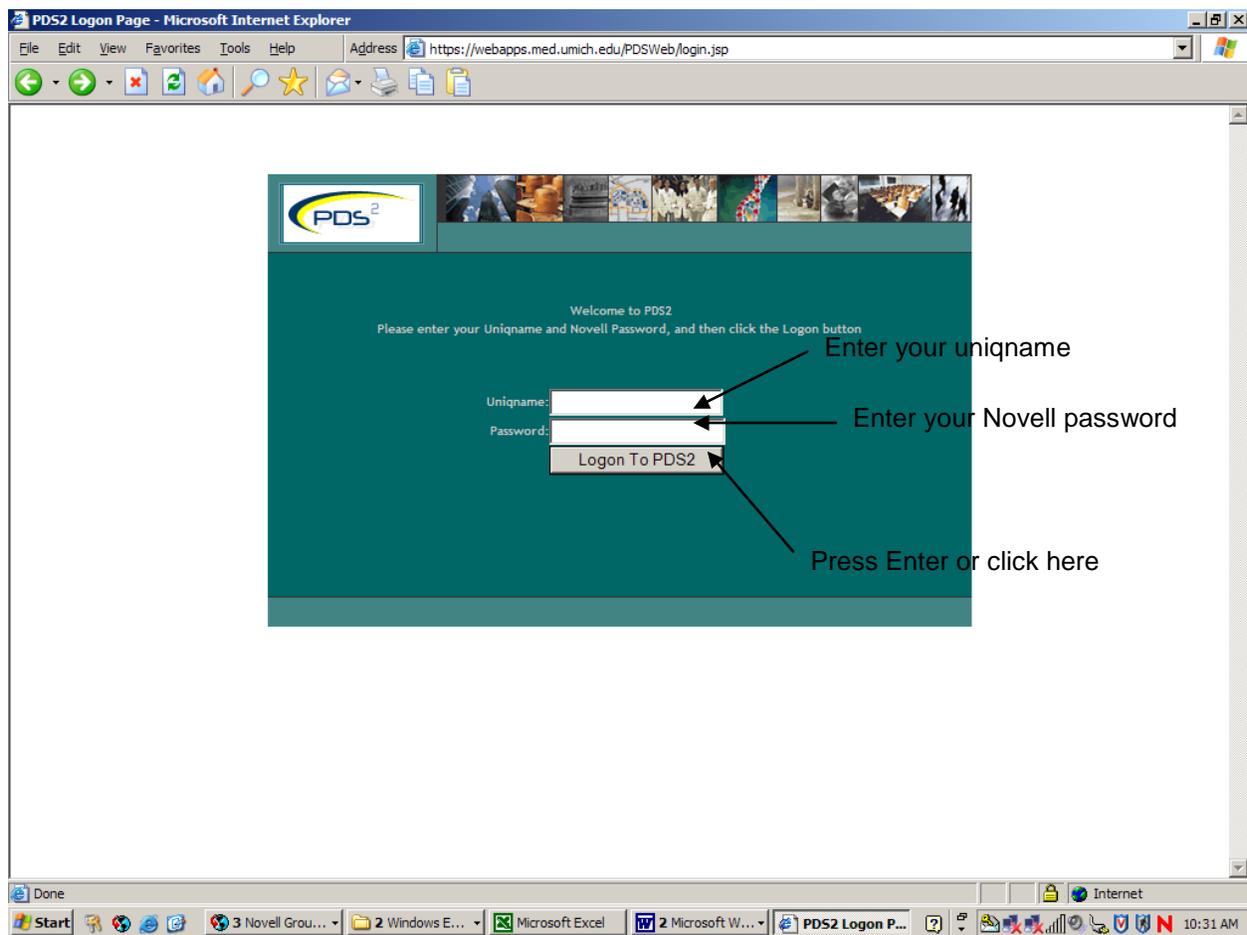
- The system notifies the requester of the new CBN via email. That email contains instructions to go into PDS2 and review the chartcom information of the new budget. That chartfield combination is to be used in the purchasing process.



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## HOW DO I LOG ON TO THE SYSTEM?

- Click on the PDS2 system link from the Facilities website [Capital Budget](#) or go directly to the system link at <https://pds.med.umich.edu/PDSWeb/login.jsp>.
- Enter your unickname (user ID).
- Enter your Novell password.
  - Call the MCIT Help Desk at 936-8000 if you need assistance with your unickname or Novell password.



## WHERE DO I GO FOR HELP?

There are several ways to get help with the PDS2 system and the capital budget request and management process in general.

- Visit the Facilities website [Capital Budget](#) for access to job aids, PDS2 user's manual and other information.
- Click on "Need Help?" links throughout the PDS2 application.
- Email the CBO: [pds-cboreview@med.umich.edu](mailto:pds-cboreview@med.umich.edu).
- Contact the MCIT Help Desk at 936-8000 if you have difficulty logging on to the system.