



USING PDS2 – SUBMITTING REQUESTS – INFORMATION TECHNOLOGY

REQUESTING INFORMATION TECHNOLOGY 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 **Information Technology (IT)** 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

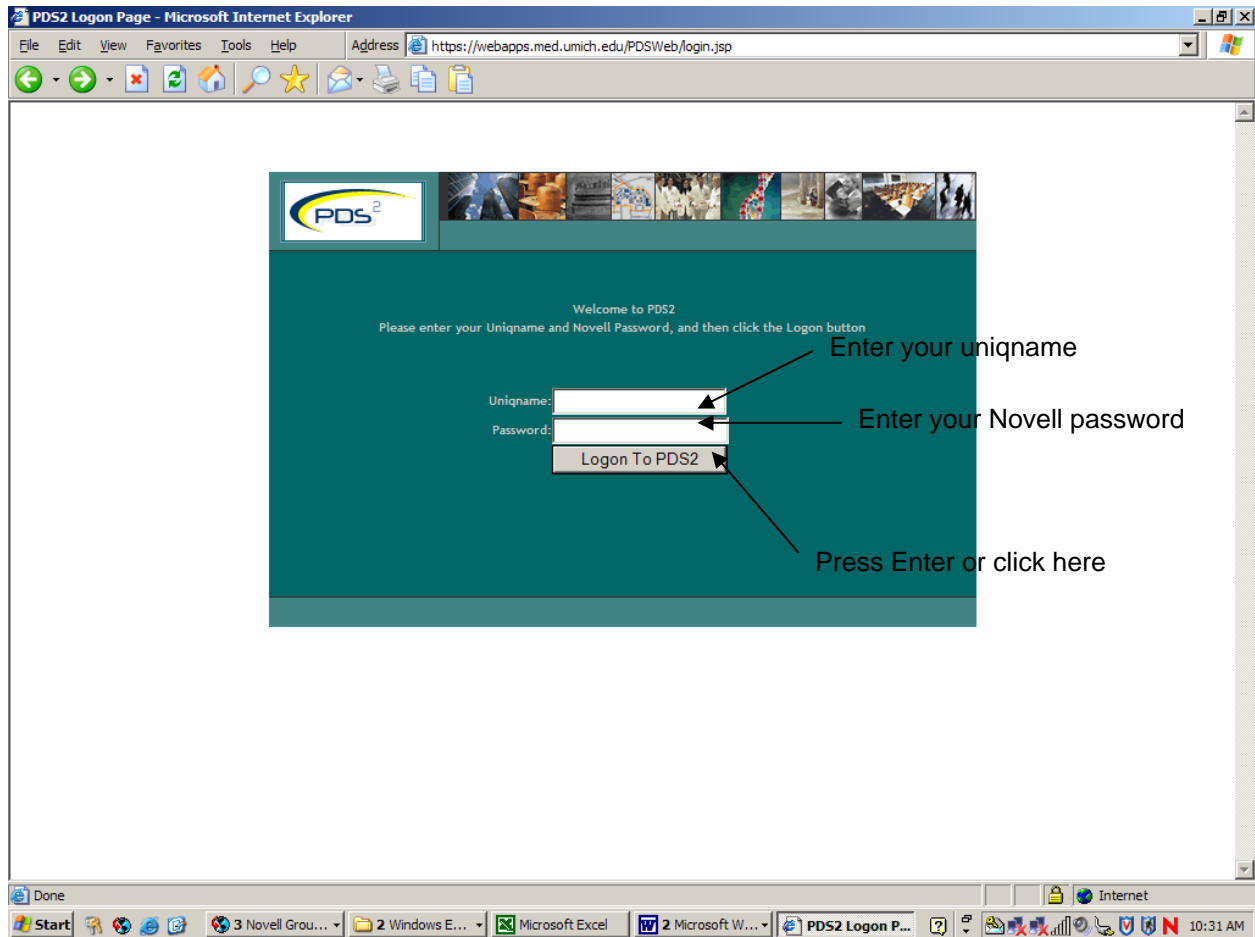
The next few pages will show you how to log in to the system, select a new request, and fill out key information.



USING PDS2 – SUBMITTING REQUESTS – INFORMATION TECHNOLOGY

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.

Project Delivery System :: PDS 2.0 - Microsoft Internet Explorer

Address: https://webapps.med.umich.edu/PDSWeb/login.do

Production

CAPITAL REQUESTS | MY BUDGETS | CAPITAL BUDGETS | CAPITAL REPORTS | SEARCH | PROXY

Capital Requests
[View Capital Requests](#)
[Enter a new request](#)
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Need Help?
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Email Capital Budget Office

Your Requests

Requests Needing Approval

Requests In Approval Process

Denied Requests

Approved Requests

Disapproved Requests

User : MARLAB

Logout !

Click “Enter a new request”

Done

Start | Novell GroupWise - ... | Document1 - Micros... | PDS2_ReqIT.doc - ... | Project Delivery ... | 11:21 AM



USING PDS2 – SUBMITTING REQUESTS – INFORMATION TECHNOLOGY

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:** Do not use this category for IT equipment. 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 that do not need MCIT support should be categorized as Equipment.
 - **NOTE:** This job aid walks you through entering an Information Technology (IT) 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).



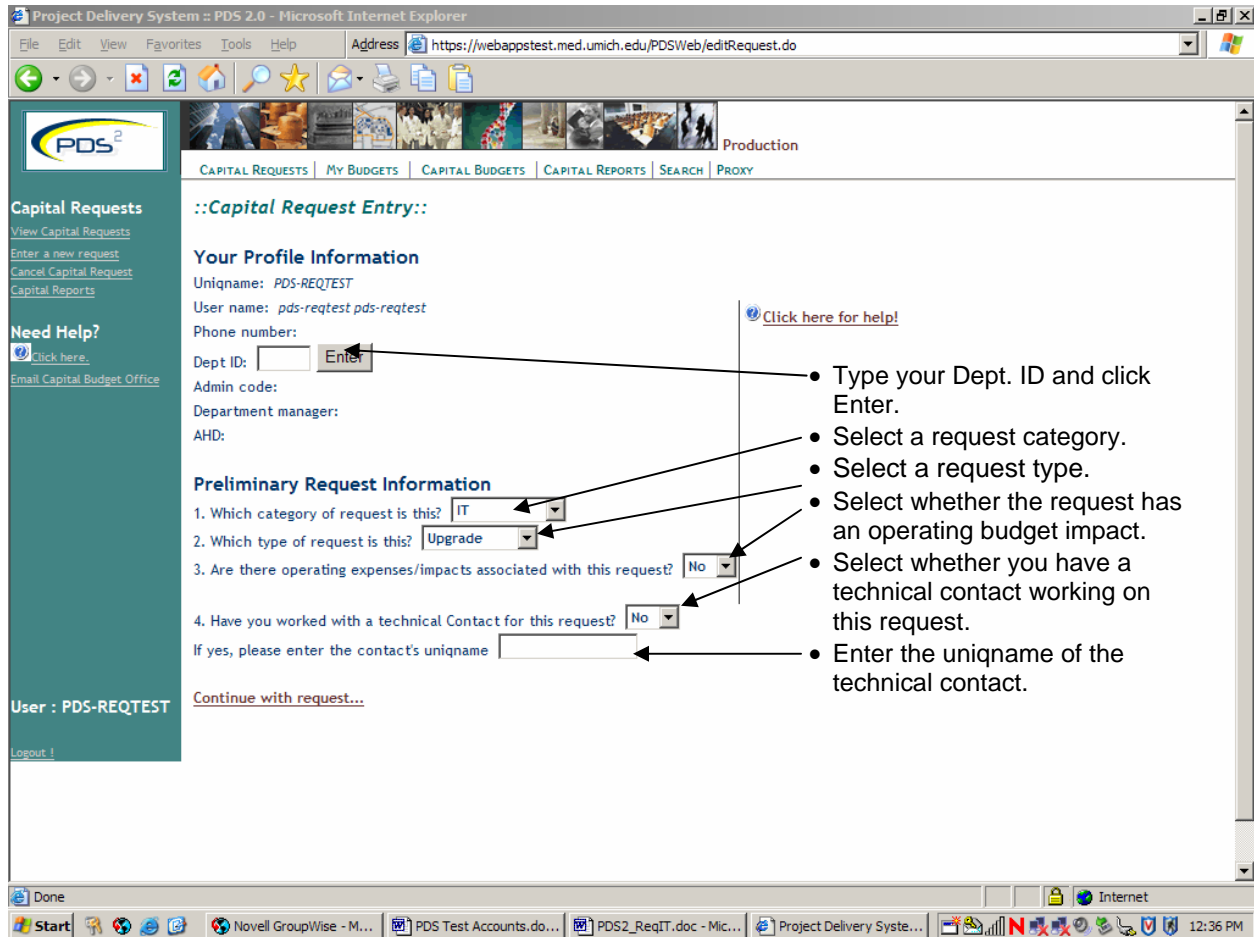
USING PDS2 – SUBMITTING REQUESTS – INFORMATION TECHNOLOGY

- 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?
 - **NOTE:** Your AHD will need to allocate the necessary operating funds for this project/purchase. MCIT will request a budget transfer when the funds are needed.
 - **NOTE:** At this time, operating budget transfers are not required for new desktop equipment.

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 an IT 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 whether you have already worked with a **technical contact** on the request.
 - Enter the **contact's uniqname** if you select Yes.
 - **NOTE:** Consider using a technical contact if you need help selecting equipment or are implementing a new application or system. To request a technical contact, go to the MCIT website at http://www.med.umich.edu/i/mcit/mcit_home/about_content/about_operate.htm and follow the instructions for "Requesting an IT Service from MCIT."
 - **NOTE:** Standard desktop equipment with model numbers and prices are listed on the MCIT website at http://www.med.umich.edu/i/mcit/mcit_services/ots-coreimage/coreimageservices.htm.
 - 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://webappstest.med.umich.edu/PDSWeb/editRequest.do>. The page title is "Project Delivery System :: PDS 2.0 - Microsoft Internet Explorer". The main content area is titled "Capital Request Entry" and contains a form for entering profile information. The form fields include: Uniqname: PDS-REQUEST, User name: pds-request pds-request, Phone number: (empty), Dept ID: 999999, Admin code: 90, Department manager: PDS-DEPTMGR, and AHD: PDS-AHDT. A "Preliminary" section contains four questions: 1. Which category? (empty), 2. Which type of? (empty), 3. Are there operating expenses/impacts associated with this request? (No), and 4. Have you worked with a technical Contact for this request? (No). A "Continue with request..." button is visible. A pop-up dialog box titled "Microsoft Internet Explorer" is overlaid on the form, displaying the message: "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 text below to the "OK" and "Cancel" buttons. The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the time 10:03 AM.

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.



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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."

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

Need Help?
Click here.
Email Capital Budget Office

User : PDS-REQTEST
Logout !

::Capital Request Entry::

Contact Information
Are you the contact for this request? No
If no, enter the Contact's unickname
User name:
Phone number:
[Click here for help!](#)

Request Information
Enter short request title (30 characters max):
Enter long request description (2000 characters max):
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."

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**.

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"/>
			Select Building:	<input type="button" value="save"/>

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.

NOTE: You can enter additional line items if needed.



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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.

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"/>	
Location		Room			
Select Building:		<input type="text"/>		save	

Current items:

Quantity	Name	Dept ID	Location	Room Number	
1	IT Request	999999	300 N INGALLS BUILDING	1234	details edit remove

Capital Total: \$0.00

[Continue with request...](#)

User : PDS-REQTEST
Logout !

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

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

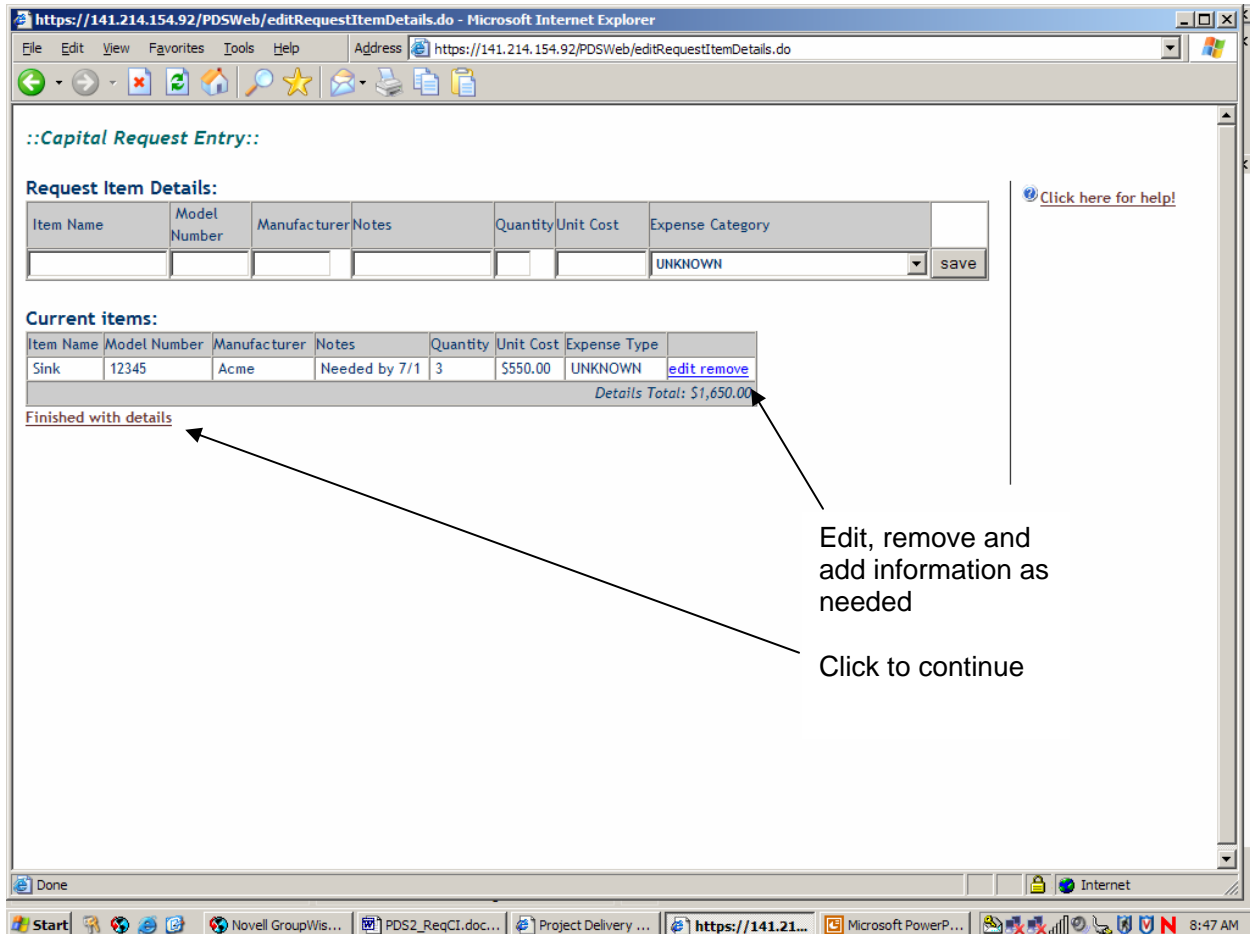
For construction requests only

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

HINT: If you need information on IT desktop equipment model numbers and prices, see the MCIT website at http://www.med.umich.edu/i/mcit/mcit_services/ots-coreimage/coreimageservices.htm.

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; if not, go to **Step 8**.

Step 7 – Complete the Operating Expenses screen

- Enter the operating **Impact Type**:
 - Revenue
 - FTE
 - Commodity
 - Other Expenses (**NOTE:** Use this category for maintenance; reference “maintenance” in description.)
 - **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	
Save	

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...](#)



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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**.

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.”



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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 the PDS2 web application interface. The main content area displays a confirmation message: "Request Confirmation: To track this request action, use the Request Tracking Number. The system now has processed your request." Below this, the Request Tracking Number is shown as 3063478. There are links for "Enter Another Request", "View This Request", and "Edit This Request". A "Logout" link is located in the bottom left corner. A sidebar on the left contains links for "Capital Requests", "Need Help?", and "User: PDS-REQTEST". A list of instructions on the right side of the screenshot points to these elements:

- 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.
- **NOTE:** IT requests will go through several layers of review and approval within MCIT and ITSAC, depending on the scope of the request. These processes are outlined in the Approving a Request section.