

External Researchers: Quick-Start Guide to PPMS (CGPL Specific)

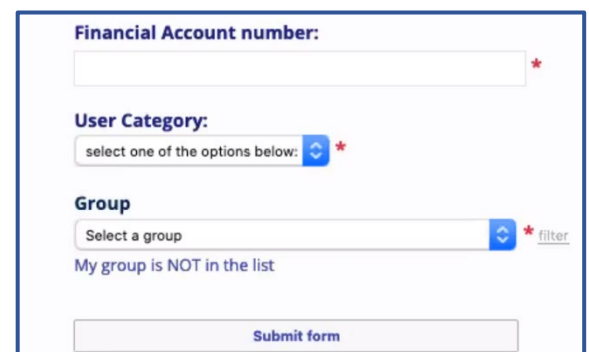
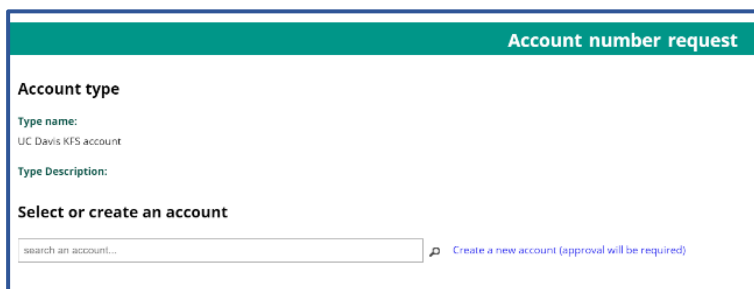
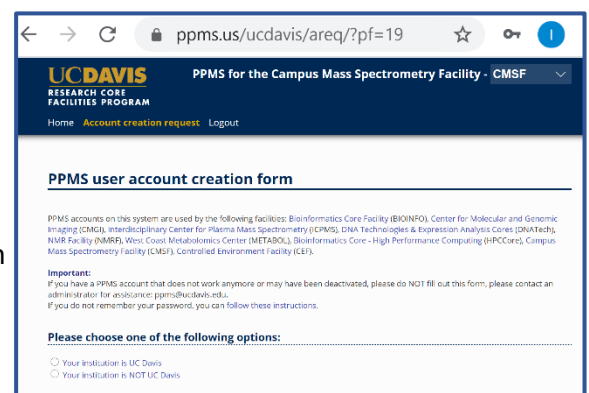
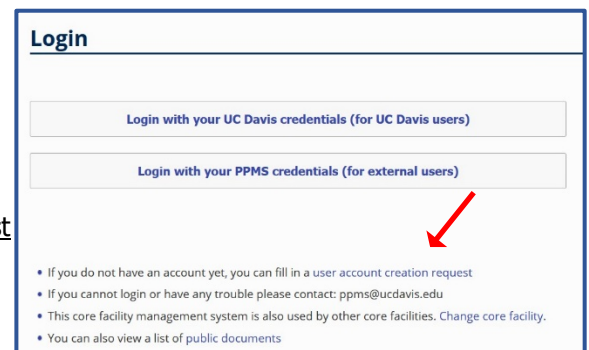
Use PPMS to request services and time on instruments

PPMS is a core management software system used in several facilities at UC Davis. PPMS is used to reserve instruments, request training, request services, and manage the financial accounts for payment of core charges. PPMS can be used by external core customers at other universities, non-profit agencies, and businesses.

Request PPMS account creation or use an existing PPMS account

Each researcher (faculty, staff, or student) will need to request an account in PPMS. Each user account in PPMS allows access to **all** cores in PPMS. Important: the **Principal Investigator (PI), lab manager, or authorized lab member** must first initiate an account creation request that also creates the lab group.

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
- Select the core of interest under Facilities available in UC Davis:
- Below the log in boxes, select the first bulleted link for user account creation OR from the top access bar, select Account Creation request
- At the PPMS user account creation form
Select the >> Your institution is NOT UC Davis
- Enter your details on the PPMS user account creation form
 - First name, Last name, Phone, Email
- Financial Account Number
 - External UCs: Add your financial IOC chartstring
 - Previously validated numbers will appear in a drop down as you begin typing. If the account number is not found >> Create a new account (approval will be required)
 - External Non-Profit & For-Profit: Add your Purchase Order, or alternatively, no financial account is required at this time and can be added later



7. User Category

Choose the appropriate role:

- Investigator
- Lab Manager
- Lab Personnel (Staff/Student)

8. Group

Choose your lab group by typing PI last name in the filter box, directly in the drop down, or by scrolling through the list of established groups sorted by department.

If your lab group is not found, you will need to create your group.

PI, lab manager, or lab members: you must first create a group if your lab is not already registered in PPMS. Select >> My Group is NOT on the list and complete the required fields.

- Group name = PI Last Name, PI First name
- Group director or PI = PI Last Name, PI First name (again)
- Group director or PI email = PI email
- Group administrator/financial contact fields = person who manages the financial accounts and grants for the PI (often the department financial manager)
 - THIS IS AN IMPORTANT PERSON TO LIST CORRECTLY AS THIS FINANCIAL CONTACT WILL REVIEW CHARGES AND RESOLVE FINANCIAL ACCOUNT ISSUES
- Accounts payable email (if different than financial contact email)
- Affiliation (Ext-UC, Ext-NP, Ext-FP)
- Institution
 - If your institution is not in the list, input your institution name directly in the text box
- Invoicing Address

9. Submit form and await an email verification of your PPMS account.

The account, group, and financial administrator information is reviewed, and approval can take a few business days.

Please contact
ppms@ucdavis.edu with
questions or concerns about
account creation or approval.

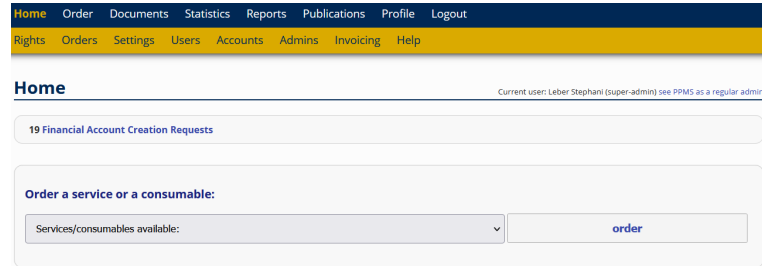
REQUEST SERVICES

1. Confirm you are on the correct Core Facility landing page, **PPMS for the Center for Genomic Pathology - CGPL**, in the top right corner of your homepage



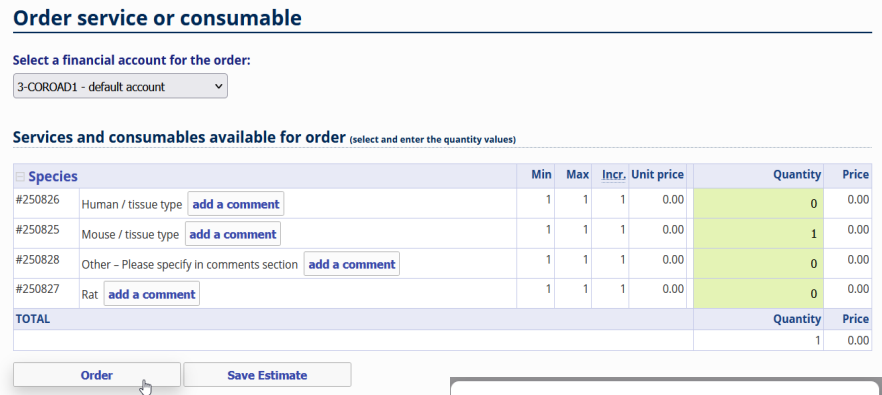
- If you are on the incorrect landing page, select CGPL from the dropdown menu

2. From **HOME** select >> Order a service or consumable and choose from drop-down menu or click the order box



OR from **HOME** >> **ORDER** tab, you will be taken to the Order page

3. Select the appropriate financial account for the order (if more than one account is available)



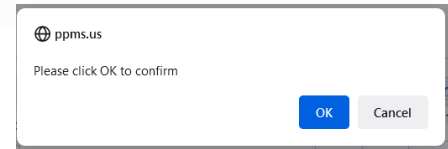
4. Services and consumables available for order:

Add **Quantity = 1** for the appropriate species

***You** will be redirected to a form to provide further details upon clicking Order.

5. Click Order at bottom left

6. Confirm by clicking OK



7. Fill out the form on the next screen

8. Review provided information

Select Submit form at the bottom of the page



Review, change funding, print, or cancel the order upon creation

PPMS HELP DESK
ppms@ucdavis.edu

Change Default Financial Account

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis and log in with your UC Davis credentials
3. From PROFILE under Default Financial Account Number Select Change your default account number.
4. Under Please enter the new account number, click inside the text box.
5. Select an account type from the drop-down list
 - Ext-UCs: Select your university
 - Ext-NP & FP: Select Purchase Order
6. Add the financial account number as provided by your PI or lab manager. Previously validated numbers will appear in a drop down as you begin typing.
If the account number is not found,
>> Create a new account (approval will be required.)
7. Click Save

This screenshot shows the 'Profile' page in the PPMS system. The 'Profile' link in the top navigation bar is circled in red. Below the navigation bar, the 'Financial Account Information' section is visible. It includes a 'Default Financial Account Number' field with the value 'Finance Admin' and a 'Change your default account number' button.

This screenshot shows the 'Request account number modification' page. It features a 'Please enter the new account number:' text box and a 'submit account number modification request' button.

This screenshot shows the 'Account number request' page. A dropdown menu titled 'Select an account type' is open, displaying various options including 'Purchase Order', 'UC Davis RFP account', 'Purchase Order', 'UCD Business Agreement Number', and several UC campuses (Berkeley, Irvine, Los Angeles, Merced, Riverside, San Diego, San Francisco, Santa Barbara, Santa Cruz).

Add Additional Financial Accounts

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis and log in with your UC Davis credentials
3. From PROFILE under Request authorization to use a financial account, select **New account authorization request**.
4. Select an account type from the drop-down list
 - Ext-UCs: Select your university
 - Ext-NP & FP: Select Purchase Order
5. Add the financial account number as provided by your PI or lab manager. Previously validated numbers will appear in a drop down as you begin typing.
If the account number is not found,
>> Create a new account (approval will be required.)
6. Click Save