

## UC Davis 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.

### 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 **PI, lab manager, or authorized lab member** must first initiate an account creation request that also creates the lab group.

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis
3. Below the log in boxes, select the first bulleted link for user account creation OR from the top access bar, select Account Creation request

#### 4. Financial Account Number

Select the >> ● **Your institution is UC Davis**.  
 You will be directed to the UC Davis log-in screen if you are not already signed in to a UCD application.  
 Log in using your UC Davis Kerberos (CAS) credentials.  
 You will be returned to the PPMS form with expanded questions.

3. Enter your details on the PPMS user account creation form.
 

- First name, Last name, Phone, UC Davis Email

4. Financial Account Number  
 Add the financial account number as provided by your PI or lab manager. The financial account number has the format X-XXXXXXX with a mixture of numbers and capital letters (a subaccount may be included at the end).

Begin typing your financial account in the Select or create an account box. If your account has already been submitted to PPMS by another user from your lab and validated, the account will appear in a dropdown list. Select the account.

If the account number is not found, select >> Create a new account (approval will be required) and enter your account information

- You will see an error message stating: "An admin will have to validate the creation of this account" – ignore this and proceed by clicking **Save**

#### 5. User Category

Choose the appropriate role

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

#### 6. 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 dept.

If your lab group is not found, you 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 (UC Davis 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**

#### 7. 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](mailto:ppms@ucdavis.edu) with  
**questions or concerns about**  
**account creation or approval.**

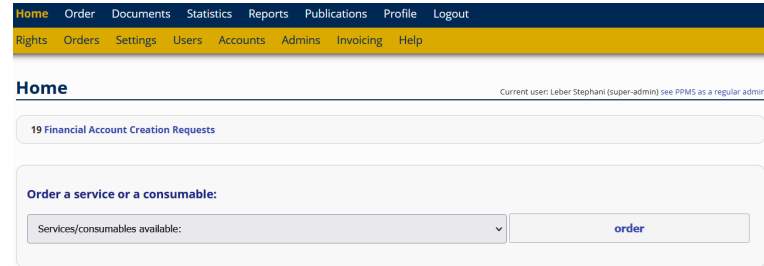
## REQUEST SERVICES

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)

### Order service or consumable

Select a financial account for the order:

3-COROAD1 - default account

Services and consumables available for order (select and enter the quantity values)

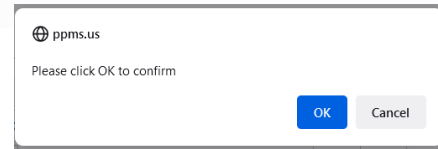
Species	Min	Max	Incr.	Unit price	Quantity	Price
#250826 Human / tissue type <a href="#">add a comment</a>	1	1	1	0.00	0	0.00
#250825 Mouse / tissue type <a href="#">add a comment</a>	1	1	1	0.00	1	0.00
#250828 Other - Please specify in comments section <a href="#">add a comment</a>	1	1	1	0.00	0	0.00
#250827 Rat <a href="#">add a comment</a>	1	1	1	0.00	0	0.00
<b>TOTAL</b>					<b>Quantity</b>	<b>Price</b>
					1	0.00

[Order](#) [Save Estimate](#)

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

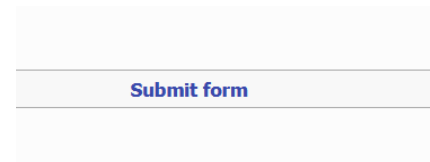
6. Confirm by clicking OK

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



## 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. Add the financial account number as provided by your PI or lab manager. The financial account number has the format X-XXXXXXX with a mixture of numbers and capital letters (a 5-character subaccount may be included at the end.)

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.)

5. Click Save

## 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. Add the financial account number as provided by your PI or lab manager. The financial account number has the format X-XXXXXXX with a mixture of numbers and capital letters (a 5-character subaccount may be included at the end.) 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.)
5. Click Save