

# 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
- Below the log in boxes, select the first bulleted link for <u>user account</u> <u>creation</u> OR from the top access bar, select <u>Account Creation request</u>
- 4. At the PPMS user account creation form 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-XXXXXX with a mixture of numbers and capital letters (a subaccount may be included at the end).

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

	ogin with your UC Davis credentials (for UC Davis users)
	Login with your PPMS credentials (for external users)
If you do not ha	we an account yet, you can fill in a user account creation request
If you cannot lo	gin or have any trouble please contact: ppms@ucdavis.edu
This core facility	management system is also used by other core facilities. Change core facility.
You can also vie	w a list of public documents
$\rightarrow$ G	🔒 ppms.us/ucdavis/areq/?pf=19 🛛 🛠 👁
→ C UCDAV	ppms.us/ucdavis/areq/?pf=19
→ C UCDAV RESEARCH CORE FACILITIES PROG	ppms.us/ucdavis/areq/?pf=19 pPMS for the Campus Mass Spectrometry Facility - CMSF

Important:
If you have a PPMS account that does not work anymore or may have been deactivated, please do NOT fill out this form, please contact an
administrator for assistance: ppms@ucdavis.edu.
If you do not remember your password, you can follow these instructions.
Please choose one of the following options:
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	*
User Category:	
select one of the options below: 📀 *	
Group	
Group Select a group	🗘 * filte

If the account number is not found, select >> <u>Create a new account</u> (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

	Account number request
Account type	
Type name:	
UC Davis KFS account	
Type Description:	
Select or create an account	
search an account	Create a new account (approval will be required)

	Account India	bei request
Account type		
Type name:		
UC Davis KPS account.		
Type Description:		
Select or create an account		
select another account		
Create a new pending account		
New account number:		
Chart:*		
Account : *		
SubAccount :		
Project :		
An admin will have to validate the	creation of this account.	
	Cancel	Save
	(	

5. User Category

Choose the appropriate role Investigator Lab Manager Lab Personnel (Staff/Student)

User Category:	
select one of the options below: 📀 *	
Group	
Select a group	🗢 * filter
My group is NOT in the list	
Submit form	

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 >> <u>My Group is</u> <u>NOT on the list</u> 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
- 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.

Group	
Select a group	filter
My group is NOT in the list	_
Group name (PI Lastname, PI Firstname)	*
Group director or PI name: (Lastname, Firstname	e)
	*
Group director or PI email:	
@ ucdavis.edu	*

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 f	or the (	Center for Genomic Pathology - CGPL
	FACILIT	IES PRO	GRAM					
	Home	Order	Documents	Statistics	Reports	Publications	Profile	Logout

Home	Order	Documents	Statistics	Reports	Publication	is Profile	Logout				
Rights	Orders	Settings	Users Acc	ounts Ad	lmins Invo	icing Help					
Hom	e							Current user:	Leber Stephani (	super-admin) see Pi	PMS as a regular admin
19 Fir	ancial Acc	ount Creation	Requests								
Orde	r a servio	e or a consi	umable:								
Serv	rices/consu	mables availabl	le:					•		order	

### 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 value)

🗆 Specie	IS .	Min	Max	Incr.	Unit price	Quantity	Price
#250826	Human / tissue type add a comment	1	1	1	0.00	0	0.00
#250825	Mouse / tissue type add a comment	1	1	1	0.00	1	0.00
#250828	Other - Please specify in comments section add a comment	1	1	1	0.00	0	0.00
#250827	Rat add a comment	1	1	1	0.00	0	0.00
TOTAL		Quantity	Price				
		1	0.00				



Submit form

### PPMS QUICK START GUIDE: UC DAVIS CUSTOMERS

### **UC DAVIS OFFICE OF RESEARCH**

JUN 2021

# **Change Default Financial Account**

- 1. Go to **PPMS start page <u>https://ppms.us/ucdavis/start</u>**
- 2. Select the core of interest under <u>Facilities available in UC Davis</u> and log in with your UC Davis credentials
- 3. From PROFILE under <u>Default Financial Account Number</u> Select <u>Change your default account number</u>.
- 4. Under <u>Please enter the new account number</u>, click inside the text box.
- Add the financial account number as provided by your PI or lab manager. The financial account number has the format X-XXXXXX 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, >> <u>Create a new account</u> (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 <u>Facilities available in UC</u> <u>Davis</u> and log in with your UC Davis credentials
- 3. From PROFILE under <u>Request authorization to use a financial</u> <u>account</u>, select <u>New account authorization request</u>.
- 4. Add the financial account number as provided by your PI or lab manager. The financial account number has the format X-XXXXXX 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, >> <u>Create a new account</u> (approval will be required.)
- 5. Click Save

Home	Book	Order	Documents	Schedules	Statistics	Reports	Publication	Profile	Logout	
Group/	Account	Managem	nent					$\smile$		
Financial Account Information										
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UC Davis KFS account									
Type Description:									
Select or create an ac	count								
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Group//	Account	Managem	nent					$\overline{}$	
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Change	your del	fault accou	int number						
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Account type										
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UC Davis KPS account										
Type Description:										
Select or create an	account									