

## UC Davis Researchers: Quick-Start Guide to Stratocore PPMS (BSR Specific)

Request PPMS user account creation or use an existing PPMS account

Each user (faculty, staff, student, or finance admin) will need to request an account in PPMS. Each user account in PPMS allows access to all facilities in PPMS – users who have previously created an account for another facility do NOT need to create another account.

1. Go to PPMS start page <https://ppms.us/ucdavis/start>
2. Select the Biostatistics Shared Resource under Facilities available in UC Davis:
3. Below the log in boxes, select the first bulleted link for user account creation request
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 Number
  - Please note, the fields for email and login will be prepopulated based on your CAS Login – **please DO NOT change these fields.**

Please enter your details below (\*: required fields)

First name:  \*

Last name:  \*

Phone:  \*

Email:  @ucdavis.edu \*

o Financial Account Number

*\*Campus requires you to list a default financial account number. If a financial account number is not specified prior to invoicing, your default account will be charged.*

*This number can be changed any time, and you may add multiple accounts to your profile, once your user account is established.*

Add your financial account number by clicking in the Financial Account Number box – an Account Number Request page will pop open.

Click in the “search an account” box beneath Select or create an account.

Begin typing your financial account number.

Financial account numbers follow 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 list as you begin typing. Select the appropriate account from the list.

If the account number is not found in the list, select >> Create a new account (approval will be required), to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately.

**\*Helpful Notes:**

a. If the error message stating “Warning: this account number is not valid” is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.

b. “An admin will have to validate the creation of this account” should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

Select Save

5. User Category

Choose the appropriate role:

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

## 6. Group

Choose your lab group by typing your Principal Investigator's 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**, create your group following with steps below:

Select >> My Group is NOT in 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 name = person who manages the financial accounts and grants for the PI (often the department financial manager)
- Group administrator/financial contact email
- Group administrator/financial contact phone
- Account Payable Email = optional, may list another contact other than the finance contact if desired
- Department = PI's department

## 7. Group Management

Check this box if you are the Investigator, Finance Admin, or Lab Manager for the group.

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

Information is reviewed by the facility admin and approval can take a few business days.

**Group name (PI Lastname, PI Firstname)**

 \*

**Group director or PI name: (Lastname, Firstname)**

 \*

**Group director or PI email:**

@ucdavis.edu \*

**Group administrative/financial contact name:**

 \*

**Group administrative/financial contact email:**

@ucdavis.edu \*

**Group administrative/financial contact phone:**

**Account Payable Email (optional):**

**Group default financial account number:**

**Affiliation:**

 \*

**Department:**

 \*

**Group management:**

I request management rights for this group

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

## Request a Project

1. Go to the PPMS start page <https://ppms.us/ucdavis/start>
2. Select the Biostatistics Shared Resource under Facilities available in UC Davis and log in with your UC Davis credentials
3. From HOME >> Make a new request: request/start a new project or from HOME >> REQUEST Tab, fill out the Biostatistician Request for Support Form:
  - Project Title
  - Description
  - Financial Account (this can be changed later)
  - Cancer Center Membership Status
  - Project Type
  - Objectives
  - Timeline
  - Outcome
  - Study Design
  - Sample Size
  - Biostatistician Preference
  - Other Info
  - Budgeting
4. Click Submit Request  
 Your request will be sent to the Biostatistics Shared Resource for approval. Once approved, you will receive an email notification and be able to view your project on your homepage under the category "My Projects." Project tracking and charges from the Biostatistics Shared Resource will be posted to this project.

The screenshot shows the PPMS website interface. At the top, the navigation bar includes 'Home', 'Order', 'Request' (highlighted with a red circle), 'Documents', 'Statistics', and 'Reports'. Below the navigation bar is a yellow banner for 'Group/Account Management'. The main content area is titled 'Home' and features a prominent callout box with a red border that reads 'Make a new request: request/start a new project' with a mouse cursor pointing to the link. Below this is the 'Biostatistician Request for Support Form'. The form includes several sections:
 

- Please enter a title for your project:** A text input field.
- Please enter a short abstract/description for your project:** A larger text input field.
- Please define the account number to use for services and activities linked with this project:** A text input field.
- Please answer the questions below:** A section containing:
  - A paragraph of text explaining the Biostatistics Shared Resource (BSR) services.
  - A URL: <https://ppms.us/ucdavis/getfile?file=11640-676-C28528C>
  - Question: 'Are you a Cancer Center Member?' with radio buttons for 'Yes', 'No', and 'Member is a member'.
  - Section: 'Check your Cancer Center membership here:' with a link to <https://ppms.us/ucdavis/getfile?file=11640-676-C28528C>
  - Section: 'Project type' with radio buttons for 'Grant Proposal', 'Protocol Development', 'Data Analysis', and 'Other (Please Specify)'.
  - Section: 'Aims/Objectives' with a text input field.
  - Section: 'Expected timeline' with a text input field.
  - Section: 'Primary endpoint/outcome (i.e., variable being used to address the primary objective)' with a text input field.
  - Section: 'Study design' with radio buttons for 'Clinical trial', 'Feasibility/Pathway Study', 'Cohort', 'Risk study', 'Preclinical', 'Prospective observational', 'Retrospective observational', 'Cross-sectional observational', and 'Other (Please Specify)'.
  - Section: 'Approximate Sample Size' with a text input field.
  - Section: 'Biostatistician Preference' with radio buttons for 'No Preference', 'Diana Migliorini', 'Lihong Qi', 'Hong Li', 'Susan Stewart', 'Shuai Chen', 'Yueqi Guo/Li', and 'Other (Please Specify)'.
  - Section: 'Other information you would like to share?' with a text input field.
  - Section: 'Do you plan to include biostatistics in your budget?' with radio buttons for 'Yes', 'No', and 'Do not know'.
  - Section: 'Additional Details' with:
    - Question: 'Should all users in your group/lab have access to this project? (Anyone in your group/lab can charge work to the project)' with radio buttons for 'Yes' and 'No'.
    - Question: 'Are there specific users outside of your group/lab who should also have access to this project? Please list:' with a text input field.
    - Question: 'Does the submitter verify the information is accurate?' with radio buttons for 'Yes' and 'No'.
- At the bottom right of the form is a 'Submit request' button, highlighted with a red box.

## Change Default Financial Account

1. Go to PPMS start page <https://ppms.us/ucdavis/start>
2. Select the facility of interest under Facilities available in UC Davis and log in with your UC Davis credentials
3. From HOME >> PROFILE  
Under the Financial Account Information section >> Default Financial Account Number >> Select Change your default account number
4. Under Please enter the new account number, click inside the text box
5. An Account Number Request page will pop up.  
Click in the "search an account" box beneath Select or create an account.  
Begin typing your financial account number.
  - Financial account numbers follow the format X-XXXXXXX

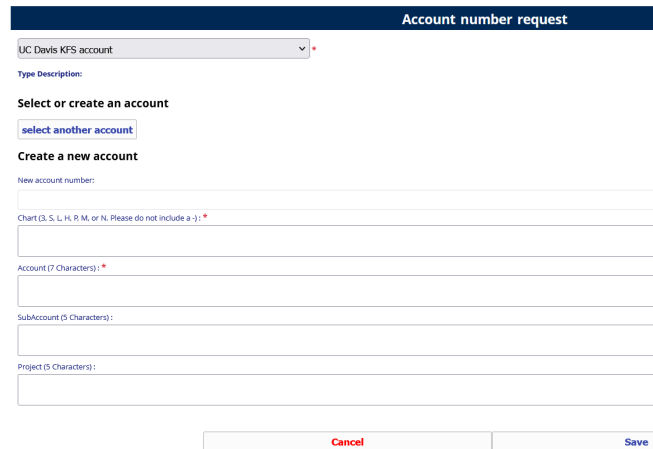
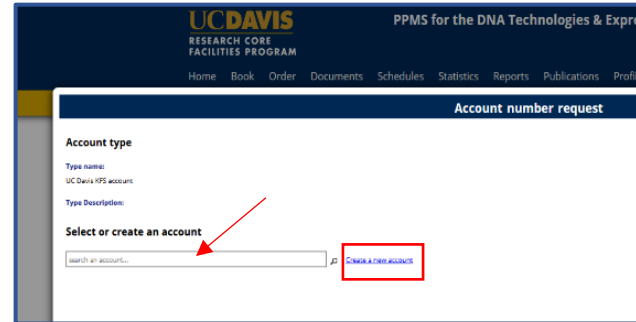
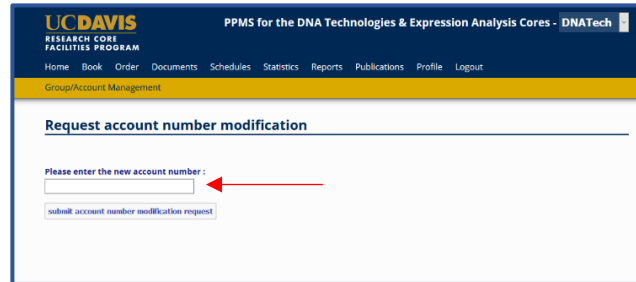
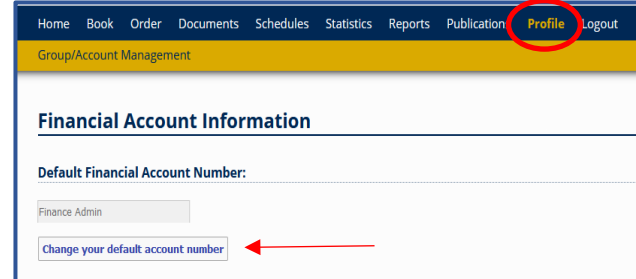
Previously validated numbers will appear in a drop-down list as you begin typing. Select the appropriate account from the list.

If the account number is not found in the list, select >> Create a new account (approval will be required), to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately. (A 5-character SubAccount may be included as well if you have one.)

### Helpful Notes:

- a. If the error message stating "Warning: this account number is not valid" is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.
- b. "An admin will have to validate the creation of this account" should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

6. Click Save



## Add Additional Financial Accounts

1. Go to PPMS start page <https://ppms.us/ucdavis/start>
2. Select the facility of interest under Facilities available in UC Davis and log in with your UC Davis credentials
3. From HOME >> PROFILE under the Financial Account Information section >> Request authorization to USE a financial account >> select New account AUTHORIZATION request
4. An Account Number Request page will pop up. Click in the "search an account" box beneath Select or create an account

account.

Begin typing your financial account number.

- Financial account numbers follow the format X-XXXXXXX

Previously validated numbers will appear in a drop-down list as you begin typing. Select the appropriate account from the list.

If the account number is not found in the list, select >> Create a new account (approval will be required), to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately. (A 5-character SubAccount may be included as well if you have one.)

### Helpful Notes:

a. If the error message stating "Warning: this account number is not valid" is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.

b. "An admin will have to validate the creation of this account" should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

5. Click Save

