

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

Request Stratocore PPMS user account creation or use an existing Stratocore PPMS account

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

- 1. Go to Stratocore PPMS start page https://ppms.us/ucdavis/start
- 2. Select the Biorepository 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 option >> "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.

	Login with your UC Davis credentials (for UC Davis users)
	Login with your PPMS credentials (for external users)
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	o not have an account yet, you can fill in a user account creation request nnot login or have any trouble please contact: ppms@ucdavis.edu
	e facility management system is also used by other core facilities. Change core facility.
	also view a list of public documents



Please enter your details belov	V (*: required fields
First name:	
	*
Last name:	
	*
Phone:	
	*
Email:	
test @ucdavis.edu	*

STRATOCORE PPMS QUICK START GUIDE: CUSTOMERS

4. 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 5character SubAccount may be included at the end.)

Previously validated numbers will appear in a dropdown 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)

Financial Account number:	*
User Category:	
select one of the options below: 😂 *	
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Group Select a group	S * <u>m</u>
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UC Davis KFS account	
Type Description:	
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Cancel Save	Cancel	Save

Select one of the options below: 🗘 *	
Group	
Select a group	🗢 * <u>filt</u>
My group is NOT in the list	
Submit form	

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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 the 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.

> Please contact <u>ppms@ucdavis.edu</u> with questions or concerns about account creation or approval.

Group direc	tor or PI name: (Lastname, Firstname
Group direc	tor or PI email:
	@ucdavis.edu
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Group defa Affiliation: UCD (UC Davi Departmen	yable Email (optional): ult financial account number: is) v t: rtment here v

Submit form

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Cancer Center Full & Associated Member – Access to Subsidized Rates

Cancer Center Members requesting access to subsidized service and instrument rates will need to first create a project **before** requesting services or reservations. Services and reservations requested without using an approved cancer-center project will not be subsidized. Note that not all cores in PPMS offer Cancer-Center member subsidies: check with the core for additional information.

Each project is specific to a core. A new project must be requested for each core for which the subsidy is accessed.

REQUEST A PROJECT

- 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 REQUEST, fill out the Project Creation Request form: **BRSR Cancer Center Project Subsidy Form**
 - Project Title ٠
 - **Project Description** •
 - **Financial Account Number** •
 - Membership Status (Full, Associated, Non-Member)* •
 - Cancer-related research* *Please answer these questions as accurately as possible. This will ensure you receive the appropriate pricing.
 - Grant & Funding information •
 - Group & Member information •
- 4. Click "Submit request"

Your request will be sent to the Core for approval. Once approved, you will receive an email notification and be able to view your project on your homepage under "My Projects." Use this Cancer-Center project when requesting services and reservations to ensure access to subsidized rates.

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		PPMS for the Biorepository shared Resource - BRSR
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	Please define the acc	ount number to use for services and activities linked with this project:
		questions below:
		mbers need fill out this form.*
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	O _{Non-member}	
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Pathology Member – Access to Subsidized Rates & Slide or Block Pulls

Pathology members requesting access to subsidized service and instrument rates will need to reference their specific project when requesting services or reservations. Services and reservations requested without using an approved pathology project will not be subsidized.

- Each Pathology PI will have a project titled "PI Last Name, PI First Name Subsidy" for access to subsidy rates.
- Each Pathology PI will have access to the project "Pathology Slide or Block Pull" to access fully funded . pulls.

REQUEST SERVICES

- 1. Go to **PPMS start page** <u>https://ppms.us/ucdavis/start</u>
- Select the core of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
- From HOME or ORDER select >> "Order a service or consumable" and choose from drop-down menu. Click the "Order" box.
- 4. [Optional] Select the appropriate project in the "Attach this order to this project*" dropdown
 * Cancer-Center & Pathology members should select the project approved for subsidized rates
 *Pathology members requesting Slide or Block Pull should select the project approved for pulls
- 5. Select the appropriate financial account for the order (if more than one account is available)
- Services and consumables available for order Add "Quantity" of 1 on the appropriate service line.
 add a comment to communicate additional information to core staff
- 7. Review quantities and service and click "Order" at bottom left.
- 8. Confirm by clicking OK.
- 9. Fill out the form on the next screen
- Review provided information
 Select "Submit form" at the bottom of the page
 Review, change funding, print, or cancel the order upon creation.

NOTE: Stratocore PPMS is NOT rated for HIPAA compliance. Please DO NOT enter any Protected Health Information (PHI) into any comments or forms within Stratocore PPMS. PHI data should only be shared through secure forms of communication (ex. secure email)

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A compatible project is required to order some services/consumables						
Request/start a new project						
Select a financial account for the order:						
3-GC07427 - default account						
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(Some services and consumables will not be visible until you select a compatible project above)						
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4090351 Fresh/Frozen Tissue add a comment	1	1	- 1	0.00	0	0.00
#090354 Provide your own specimen (wet tissue, blocks and slides) add a comment	1	1	1	0.00	0	0.00
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TOTAL					Quantity	Price
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ntinue with your order, please answe

Ice to All Principal Investigators: resource is funded by the UC Davis Commendencies Conter Support Grant (ICSSG) avanded by the National Cancer Institute (NCI PSOC4053373). Publications threa utiliated faulty resources, services or solentific data generated by the resource should acknowledge the resource to the assistance provided by resource shall an an exist the NCI CASC grant. An electronic cascy of the publication should also be sent to the resource therein.

Order completed								
Thanks for creating this order!								
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Order vef #25404								
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Cancel order								

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Change Default Financial Account

- 1. Go to **PPMS start page** <u>https://ppms.us/ucdavis/start</u>
- 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.

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UC Davis KFS account	•		
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Account (7 Characters) : *			
SubAccount (5 Characters) :			
Project (5 Characters) :			
	Cancel		Save

6. Click "Save"

Add Additional Financial Accounts

- 1. Go to **PPMS start page** <u>https://ppms.us/ucdavis/start</u>
- 2. Select the facility of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
- 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"

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"

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Type Description:		
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Chart : *		
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An admin will have to validate the	creation of this account.	