UCDAVIS
RESEARCH CORE
FACILITIES PROGRAM

My PPMS ∨

Home   Settings   Users   Accounts   Admins   Reports   Projects   Profile   Stats   API   Files   Help   Logout

UC Davis Researchers: Quick-Start Guide to Stratocore PPMS (GSR 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 Genomics 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.**

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 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 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.

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:

UCD (UC Davis) ⌄ *

Department:

Select a Department here ⌄ *

Group management:

☐ I request managment rights for this group

**Submit form**

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
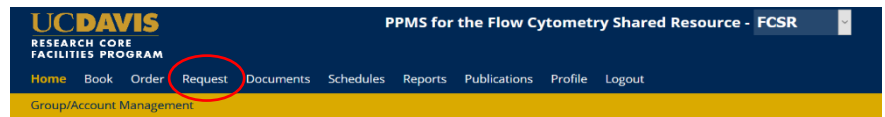
1. Go to **PPMS start page** https://ppms.us/ucdavis/start

2. Select the facility of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials

3. From REQUEST Tab, fill out the requested GSR Project Creation form
   - Project Title
   - Project Description
   - Financial Account related to the project
     *A separate project will need to be created for each grant/fund account
   - 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.
   - Title of Grant
   - Grant Number
   - Funding Agency
   - Group Access
   - User Access

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.

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"
   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"