UCDAVIS
RESEARCH CORE
FACILITIES PROGRAM

My PPMS ∨

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External Researchers: Quick-Start Guide to PPMS

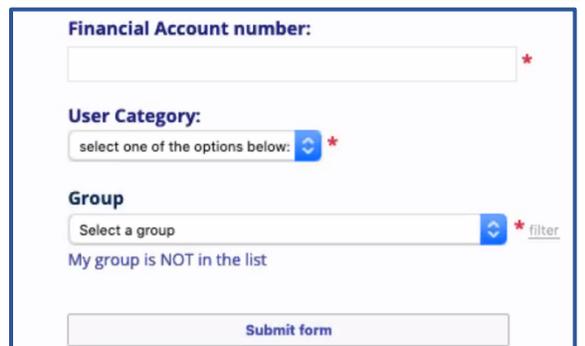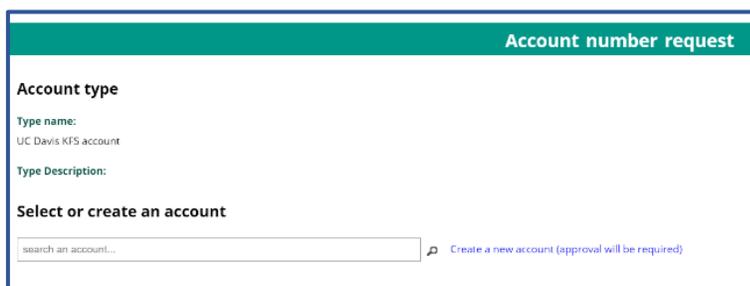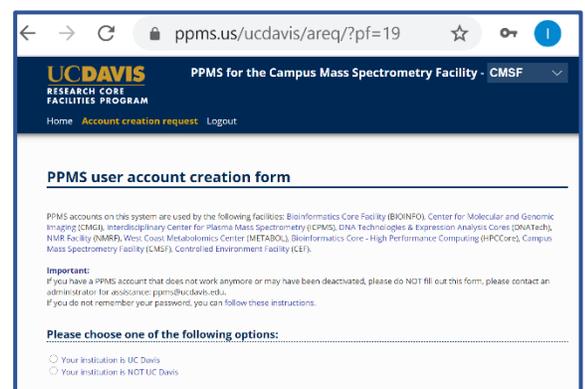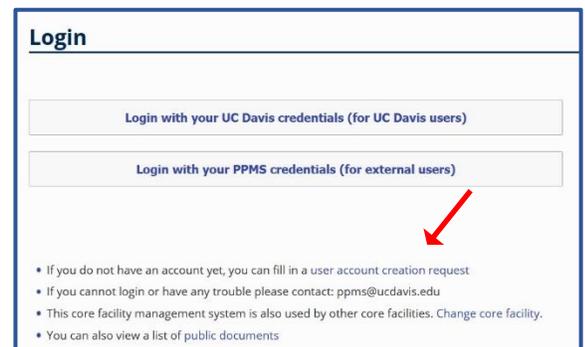**Use PPMS to request services and time on instruments**

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. PPMS can be used by external core customers at other universities, non-profit agencies, and businesses.

Request PPMS account creation or use an existing PPMS account

Each researcher (faculty, staff, or student) will need to request an account in PPMS. Existing accounts created for one core using PPMS are valid at all other cores using PPMS. Important: the Principal Investigator (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

4. At the PPMS user account creation form
   Select the >> ● Your institution is NOT UC Davis.

5. Enter your details on the PPMS user account creation form.
   First name, Last name, Phone, Email

6. Financial Account Number
   • External UCs: Add your financial IOC chartstring
   • External Non-Profit & For-Profit: Add your Revenue Agreement, Purchase Order, or alternatively, no financial account is required
   *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)

Login

Login with your UC Davis credentials (for UC Davis users)

Login with your PPMS credentials (for external users)

• If you do not have an account yet, you can fill in a user account creation request
• If you cannot login 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 view a list of public documents

← → C   🔒 ppms.us/ucdavis/areq/?pf=19   ☆   ⊶   ①

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PPMS for the Campus Mass Spectrometry Facility - CMSF ∨

Home   Account creation request   Logout

PPMS user account creation form

PPMS accounts on this system are used by the following facilities: Bioinformatics Core Facility (BIOINFO), Center for Molecular and Genomic Imaging (CMGI), Interdisciplinary Center for Plasma Mass Spectrometry (ICPMS), DNA Technologies & Expression Analysis Cores (DNATech), NMR Facility (NMRF), West Coast Metabolomics Center (METABOL), Bioinformatics Core - High Performance Computing (HPCCore), Campus Mass Spectrometry Facility (CMSF), Controlled Environment Facility (CEF).

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:
○ Your institution is UC Davis
○ Your institution is NOT UC Davis

Financial Account number:
[   ] *

User Category:
[select one of the options below: ⬍] *

Group
[Select a group ⬍] * filter
My group is NOT in the list

Submit form

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)

7. User Category
   Choose the appropriate role:
   - Investigator
   - Lab Manager
   - Lab Personnel (Staff/Student)

8. 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 department.
   If your lab group is not found, check with your PI or lab manager.

   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 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
   - 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
   - Accounts payable email (if different than financial contact email)
   - Affiliation (Ext-UC, Ext-NP, Ext-FP)
   - Institution
     - If your institution is not in the list, input your institution name directly in the text box
   - Invoicing Address

9. 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 with questions or concerns about account creation or approval.

Change Default Financial Account

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

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.

5. Select an account type from the drop-down list

- Ext-UCs: Select your university
- Ext-NP & FP: Select Purchase Order

6. Add the financial account number as provided by your PI or lab manager.
   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.)

7. Click <u>Save</u>

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 Davis</u> and log in with your UC Davis credentials

3. From PROFILE under <u>Request authorization to use a financial account</u>, select <u>New account authorization request</u>.

4. Select an account type from the drop-down list

   - Ext-UCs: Select your university
   - Ext-NP & FP: Select Purchase Order

5. Add the financial account number as provided by your PI or lab manager.
   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.)

6. Click <u>Save</u>