

UC Davis 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.

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:
3. Below the log in boxes, select the first bulleted link for user account creation (arrow at right)
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-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 >> Create a new account (approval will be required), 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:**

- 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.
- "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. User Category

Choose the appropriate role

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

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, check with your PI or lab manager, or if authorized to create your group continue with steps below:

PI, lab manager, or lab members: you must first create a group if your lab is not already registered in PPMS. Select >> My Group is NOT on 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 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**

7. 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 Facilities available in UC Davis and log in with your UC Davis credentials
3. From PROFILE under Default Financial Account Number Select Change your default account number.
4. Under Please enter the new account number, click inside the text box.
5. Add the financial account number as provided by your PI or lab manager. The financial account number has 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 as you begin typing. If the account number is not found, >> Create a new account (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 Facilities available in UC Davis and log in with your UC Davis credentials
3. From PROFILE under Request authorization to use a financial account, select New account authorization request.
4. Add the financial account number as provided by your PI or lab manager. The financial account number has 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 as you begin typing. If the account number is not found, >> Create a new account (approval will be required.)
5. Click Save