



# PPMS

## QUICK START MANUAL

*for users with a Yale NetID*

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## Log in to PPMS

1. Clicking on the link to PPMS <https://ppms.us/yale/start/> will bring you to the Start Page
2. Select the Facility you want to use (e.g. Flow Cytometry in YSM)

The screenshot shows the Yale University website's 'Start Page'. At the top is the Yale University logo. Below it is a 'Start Page' link. The main content area is titled 'Start page' and contains a search bar. Underneath, there are two sections of facilities:

- Facilities available in Yale School of Medicine:**
  - Flow Cytometry (FC) details
  - Keck Mass Spectrometry and Proteomics (KMSP)
  - Macromolecular X-Ray Crystallography (MXC) details
- Facilities available in Yale University (non-YSM):**
  - West Campus Imaging Core (WCIC) details
  - Yale Analytical and Stable Isotope Center (YASIC) details
  - Yale Glassblowing Laboratory (YGL)

A red arrow points to the 'Flow Cytometry (FC) details' link.

3. Log in with your Yale NetID and password

The screenshot shows the 'PPMS for the Flow Cytometry - FC' login page. The header includes the title and a dropdown menu. Below the header is a navigation bar with links: Home, Account creation request, Schedules, Statistics, and Logout. The main content area is titled 'Login' and contains two login options:

- 1. Login with your Yale credentials (for Yale users)
- 2. Login with your PPMS credentials (for external users)

Red arrows and circled numbers 1 and 2 point to the respective login buttons.



## Verify Your Group

Verify that you are assigned to a Group and that the Group is the correct one.

1. To verify your assigned group, from the home page click on Profile in the upper right-hand corner of the page.

PPMS for the Flow Cytometry - FC

Home Book Order Request Documents Schedules Statistics Reports Publications **Profile** Logout

Home Current user: Adelberg Courtney (regular user view) restore administrator view

**Book a system:** Systems available:

**Order a service or a consumable:** Services/consumables available:

Make a new request: [request a training](#) [request/start a new project](#)

2. Under the Profile section, verify the Group listed is correct. If not, you will need to email the core admin.

PPMS for the Flow Cytometry - FC

Home Book Order Request Documents Schedules Statistics Reports Publications **Profile** Logout

### User profile

**Login:**

**Name:**

**Phone:**

**Group:**

**Group PI:**

**Note:** You can only be associated with 1 Group at a time but you can have authorization to use multiple COAs, if you do work for multiple Groups



## Verify your COA(s)

All services requested through PPMS require the use of an account that has been authorized for your use by your department.

1. To see individual COA and split accounts that are authorized for your use, scroll down in the Profile to the “Financial Accounts available for use:” section.

### Financial Accounts available for use:

Select one of your available systems:

Select one of your available services:

Account Number	Account Type	Origin	Start	End
CO01-GR016365---CC0505-PG00032-PJ000001-GWB3 - DOE DE-PG02-07ER15909Oxomanganese Catalysts	COA (All fields)	authorization		
CO01-GR105885---CC0505-PG00032-PJ000001-PLH27 - NIH - Radical Alkene	COA (All fields)	authorization		
CO01---YD000268-CC1558-PG00032-PJ100054	COA (All fields)	authorization		
CO01-GR016359---CC0505-PG00032-PJ000001-GWB3 (69%), CO01-GR109284---CC0505-PG00032-PJ000001-GWB3 (31%)	COA (All fields)	authorization		Feb 28 2023
CO01-GR016365---CC0505-PG00032-PJ000001-GWB3 (40%), CO01-GR016360---CC0505-PG00032-PJ000001-VSB4 (30%), CO01-GR016363---CC0505-PG00032-PJ000001-CHARLIES (30%)	COA (All fields)	authorization	Aug 21 2022	
CO01-GR038041---CC0505-PG00032-PJ000001-HW338 (60%), CO08---YD000001-NC0088-PG00032-PJ015076-AP364 (40%)	COA (All fields)	authorization		

2. Verify that the COA(s) you wish to use are listed in your list of available accounts.
3. If the required COA authorization is not available, proceed to the next section to request authorization. If you need access to a split authorization, please contact your department directly to request this authorization be created.

## Request Authorization to use a COA

1. To request authorization to use a COA, click on “New account authorization request” button (1).

### Financial Account Information

#### Default Financial Account Number:

tc786

[Change your default account number](#)

#### Request authorization to use a financial account:

[New account authorization request](#)



2. From the drop down, select COA (All fields) (1) and then click in the box to search for an account and enter the COA you wish to use (2). After selecting the COA, click on the Save button below



3. Please note the COA will be validated in real time and the system will only accept a COA with valid segment information.

3. After selecting Save, your request to use the COA will be submitted for approval. The department responsible for this COA will receive notification to approve this authorization request.



## Request Addition/Creation of a COA

1. If the COA you wish to use is not already created in PPMS, select COA (All fields) (1) and then click on “Create a new account (approval will be required)” (2).

The screenshot shows the 'Account number request' form. Under the heading 'Select an account type', a dropdown menu is set to 'COA (All fields)'. A red arrow labeled '1' points to this dropdown. Below it, the 'Type Description' is 'default account type'. Under the heading 'Select or create an account', there is a search box and a blue link that says 'Create a new account (approval will be required)'. A red arrow labeled '2' points to this link.

2. Fill out the required information below. Cutting and pasting the values can sometimes cause errors and suggest that the COA is invalid. Manually typing the characters for each field will overcome this. For many types of funding, the “company code” is CO01 that uses the letter O followed by the number zero.

Be sure to save it when you are done!

The screenshot shows the 'Account number request' form with the 'Create a new pending account' section expanded. The 'New account number' field is empty. Below it are several code fields, each with a red asterisk indicating it is required: 'Company code', 'Grant code', 'Gift code', 'Yale Designated code', 'Cost Center code', 'Program code', and 'Project code'. The 'Assignee' field is also empty. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. A green arrow points from the text 'Be sure to save it when you are done!' to the 'Save' button.



## **Request Addition/Creation of a COA**

3. After saving the new COA, the request will be automatically forwarded to the lead administrator in the business office of the department responsible for this COA. Once they have approved your ability to use this COA, your PPMS account will become fully active. If you've checked with your lead administrator and they have not received the approval request, then please contact [PPMS@yale.edu](mailto:PPMS@yale.edu) for further assistance.

Please note that only the business office can approve COAs. Unfortunately, core facility staff are unable to add any billing information for you in this system, nor override the system to make bookings on your behalf without an approved COA associated with your account.