# PPMS QUICK START MANUAL

for users with a Yale NetID

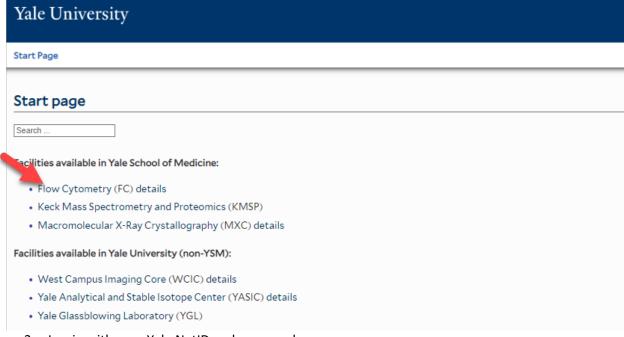
# **Table of Contents**

Log in to PPMS	2
Verify Your Group	
Verify your COA(s)	
Request Authorization to use a COA	4
Request Addition/Creation of a COA	6

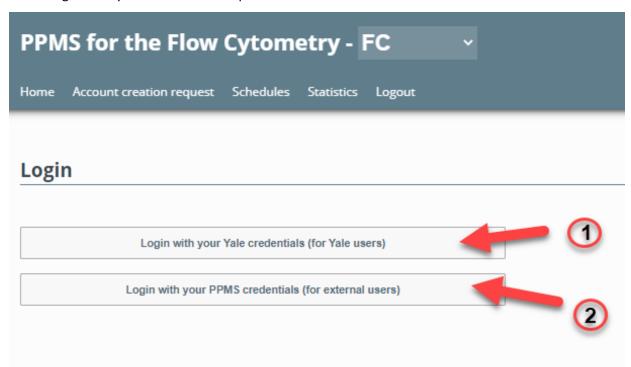
10/26/2022 Page 1 of 7

### Log in to PPMS

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



3. Log in with your Yale NetID and password

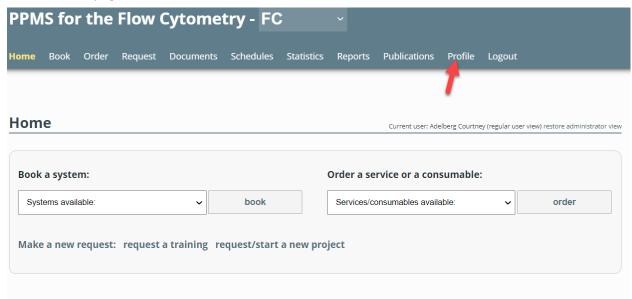


10/26/2022 Page 2 of 7

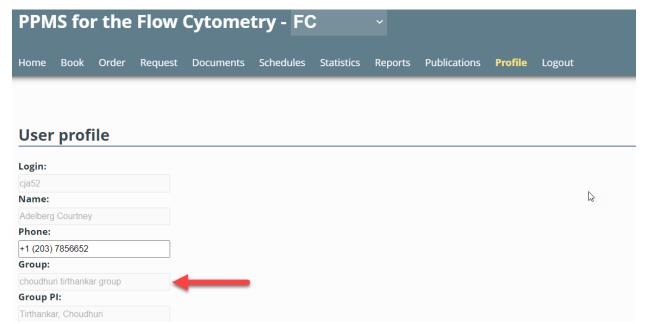
#### **Verify Your Group**

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.



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



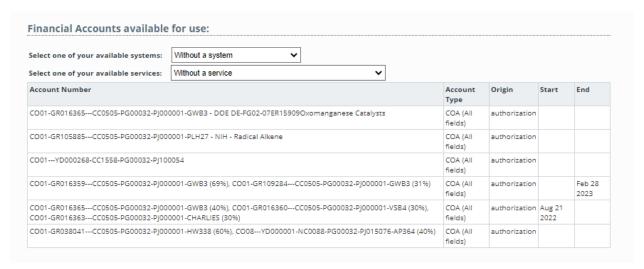
**Note:** You can only be associated with 1 Group at a time but you can have authorization to use multiple COAs, if you do work for multiple Groups

10/26/2022 Page 3 of 7

## 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.



- 2. Verify that the COA(s) you wish to use are listed in your list of available accounts.
- 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**

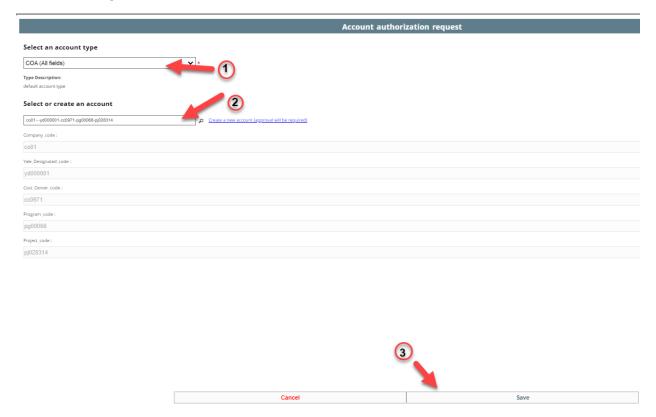
1. To request authorization to use a COA, click on "New account authorization request" button (1).



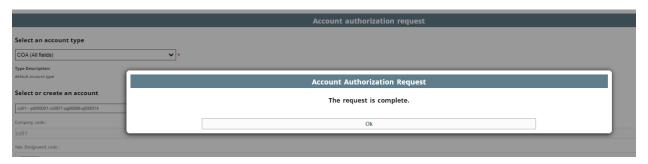
2. From the drop down, select COA (All fields) (1) and then click in the box to search for an account and enter the COA you wish to use (2). After selecting the COA, click on the Save button below

10/26/2022 Page 4 of 7

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



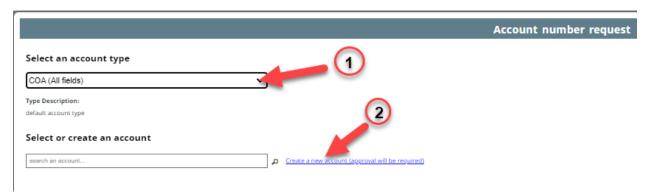
3. After selecting Save, your request to use the COA will be submitted for approval. The department responsible for this COA will receive notification to approve this authorization request.



10/26/2022 Page 5 of 7

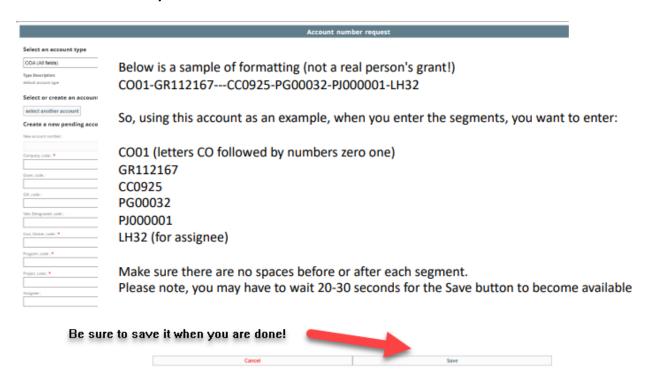
#### Request Addition/Creation of a COA

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).



2. Fill out all the required information. 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 COO1 that uses the letter O followed by the number zero.

#### Be sure to save it when you are done!



10/26/2022 Page 6 of 7

## 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 <a href="mailto:PPMS@yale.edu">PPMS@yale.edu</a> 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 the system, nor override the system to make bookings on your behalf without an approved COA associated with your account.

10/26/2022 Page 7 of 7