



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, there is a dark blue header with the Yale University logo and the text "Yale University". Below the header, the page is titled "Start Page". A search bar is visible. The main content area is titled "Start page" and lists facilities available in the Yale School of Medicine and Yale University (non-YSM). A red arrow points to the "Facilities available in Yale School of Medicine:" section.

Yale University

Start Page

Start page

Search ...

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)

3. Log in with your Yale NetID and password

The screenshot shows the PPMS for the Flow Cytometry - FC login page. The header is dark blue with the text "PPMS for the Flow Cytometry - FC" and a dropdown arrow. Below the header, there is a navigation menu with links: Home, Account creation request, Schedules, Statistics, and Logout. The main content area is titled "Login" and contains two login options: "Login with your Yale credentials (for Yale users)" and "Login with your PPMS credentials (for external users)". Red arrows point to each option, with circled numbers 1 and 2 next to them.

PPMS for the Flow Cytometry - FC

Home Account creation request Schedules Statistics Logout

Login

Login with your Yale credentials (for Yale users) 1

Login with your PPMS credentials (for external users) 2



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:

Request authorization to use a financial account:



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.

The screenshot shows the 'Account authorization request' form. At the top, there is a header 'Account authorization request'. Below it, the form is divided into two main sections: 'Select an account type' and 'Select or create an account'. In the 'Select an account type' section, a dropdown menu is set to 'COA (All fields)'. A red arrow with a circled '1' points to this dropdown. In the 'Select or create an account' section, there is a text input field containing the account ID 'co01--yd000001-co0971-pg00066-pj028314'. A red arrow with a circled '2' points to this field. Below this field are several other input fields for 'Company code', 'Yale Designated code', 'Cost Center code', 'Program code', and 'Project code', each with its respective value filled in. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. A red arrow with a circled '3' points to the 'Save' button.

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.

This screenshot shows the same 'Account authorization request' form as the previous one, but with a confirmation dialog box overlaid in the center. The dialog box has a title bar that says 'Account Authorization Request' and a message that reads 'The request is complete.' Below the message is an 'Ok' button. The background form is dimmed, showing the same fields and buttons as before.



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 CO01 that uses the letter O followed by the number zero.

Be sure to save it when you are done!

Be sure to save it when you are done!



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 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.