PPMS QUICK START MANUAL

for users with a Yale NetID

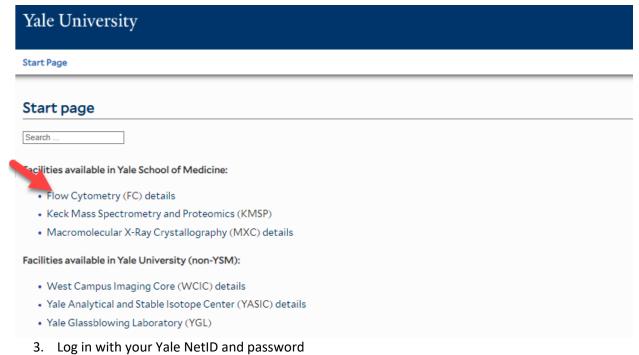
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Log in to PPMS

- 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)



PPMS for the Flow Cytometry - FC

Home Account creation request Schedules Statistics Logout

Login

Login with your Yale credentials (for Yale users)

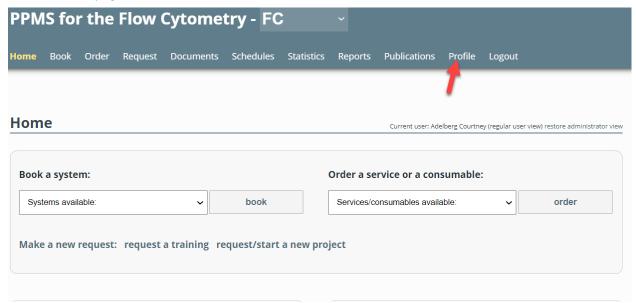
Login with your PPMS credentials (for external users)

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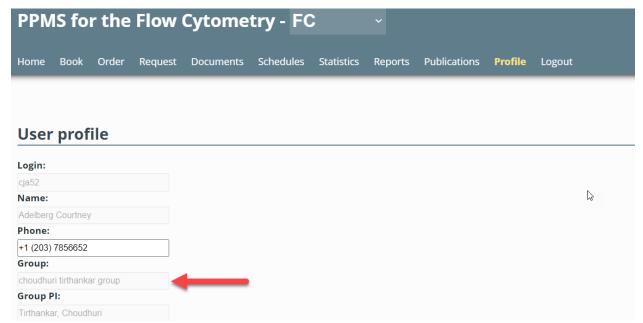
Verify Your Group

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.



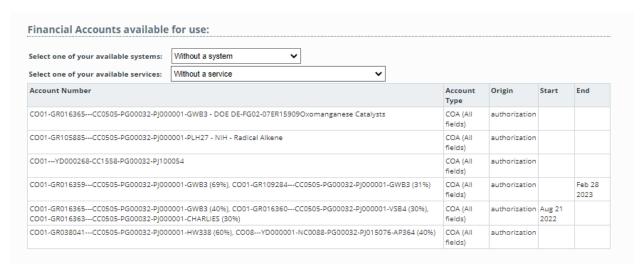
Note: You can only be associated with 1 Group at a time but you can have authorization to use multiple COAs, if you do work for multiple Groups

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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

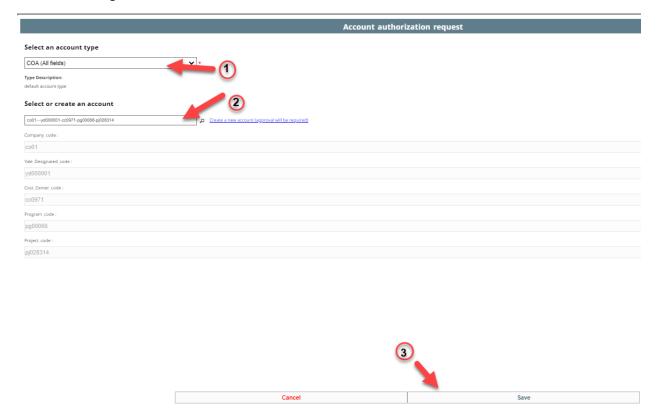
1. To request authorization to use a COA, click on "New account authorization request" button (1).



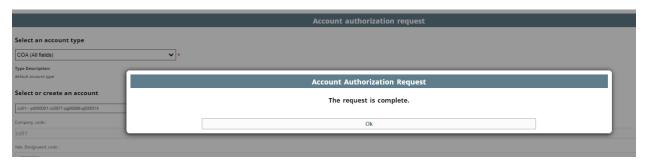
2. From the drop down, select COA (All fields) (1) and then click in the box to search for an account and enter the COA you wish to use (2). After selecting the COA, click on the Save button below

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



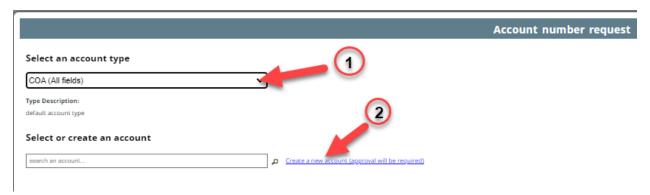
3. After selecting Save, your request to use the COA will be submitted for approval. The department responsible for this COA will receive notification to approve this authorization request.



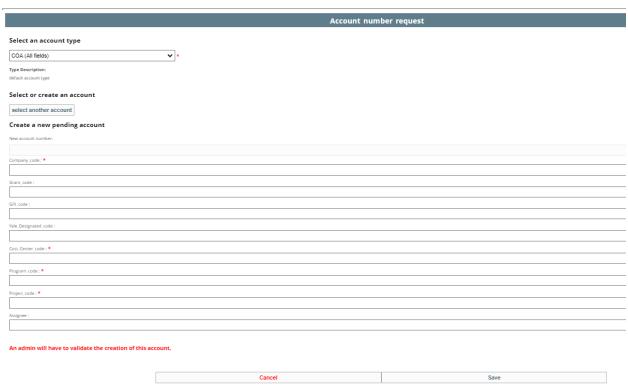
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Request Addition/Creation of a COA

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 below and click the Save button to submit your request. This request will be reviewed and approved by the department responsible for this COA.



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