



# PPMS

## QUICK START MANUAL

*for users with a Yale NetID*

### Table of Contents

Log in to PPMS.....	2
Verify Your Group.....	3
Verify your COA(s).....	4
Request Authorization to use a COA .....	4
Request Addition/Creation of a COA.....	6



## 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 name. Below the header, the text "Start Page" is visible. A search bar is present. The main content area is titled "Start page" and lists facilities available in two categories: "Facilities available in Yale School of Medicine:" and "Facilities available in Yale University (non-YSM):". A red arrow points to the first facility listed under the first category: "Flow Cytometry (FC) details".

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 buttons. The first button is "Login with your Yale credentials (for Yale users)" and the second is "Login with your PPMS credentials (for external users)". Red arrows point to each button, and circled numbers 1 and 2 are placed next to them respectively.

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:   Order a service or a consumable:

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).

**Account number request**

Select an account type

COA (All fields)

Type Description:  
default account type

Select or create an account

search an account... [Create a new account \(approval will be required\)](#)

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.

**Account number request**

Select an account type

COA (All fields)

Type Description:  
default account type

Select or create an account

Create a new pending account

New account number:

Company code: \*

Grant code:

Gift code:

Yale Designated code:

Cost Center code: \*

Program code: \*

Project code: \*

Assignee:

**An admin will have to validate the creation of this account.**