



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 'Start Page' of the Yale University PPMS system. At the top is a dark blue header with 'Yale University' in white. Below this is a light blue bar with 'Start Page' in white. The main content area is white and titled 'Start page'. It features a search bar with the placeholder text 'Search ...'. Below the search bar, there are two sections of facilities. The first section, 'Facilities available in Yale School of Medicine:', is highlighted with a red arrow. It contains three bullet points: 'Flow Cytometry (FC) details', 'Keck Mass Spectrometry and Proteomics (KMSP)', and 'Macromolecular X-Ray Crystallography (MXC) details'. The second section, 'Facilities available in Yale University (non-YSM):', contains three bullet points: 'West Campus Imaging Core (WCIC) details', 'Yale Analytical and Stable Isotope Center (YASIC) details', and '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 title 'PPMS for the Flow Cytometry - FC' in white, followed by a dropdown arrow. Below the header is a navigation bar with links: 'Home', 'Account creation request', 'Schedules', 'Statistics', and 'Logout'. The main content area is white and titled 'Login'. It contains two login options, each with a red arrow pointing to it and a circled number. The first option is 'Login with your Yale credentials (for Yale users)' with a red arrow and a circled '1'. The second option is 'Login with your PPMS credentials (for external users)' with a red arrow and a circled '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: book

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

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: cja52

Name: Adelberg Courtney

Phone: +1 (203) 7856652

Group: choudhuri tirthankar group

Group PI: Tirthankar, Choudhuri

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:

Without a system

Select one of your available services:

Without a service

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.

The screenshot shows the 'Account authorization request' form. It includes a dropdown menu for 'Select an account type' with 'COA (All fields)' selected, indicated by a red arrow and a circled '1'. Below this is a 'Type Description' field. The 'Select or create an account' section has a text input field containing 'co01--y0000001-co0971-pg00066-pj028314', indicated by a red arrow and a circled '2'. Below this are fields for 'Company code', 'Yale Designated code', 'Cost Center code', 'Program code', and 'Project code'. At the bottom, there are 'Cancel' and 'Save' buttons, with a red arrow and a circled '3' pointing 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.

The screenshot shows the 'Account authorization request' form with a confirmation dialog box overlaid. The dialog box is titled 'Account Authorization Request' and contains the text 'The request is complete.' with an 'OK' button.



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. Step 1 points to the 'Select an account type' dropdown menu, which has 'COA (All fields)' selected. Step 2 points to the 'Create a new account (approval will be required)' link next to the 'search an account...' input field.

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.

The screenshot shows the 'Account number request' form with the 'Create a new pending account' section expanded. It includes fields for 'New account number', 'Company code', 'Grant code', 'Gift code', 'Yale Designated code', 'Cost Center code', 'Program code', 'Project code', and 'Assignee'. A red message states: 'An admin will have to validate the creation of this account.' At the bottom are 'Cancel' and 'Save' buttons.