



PPMS QUICK START MANUAL

for users with a Yale NetID

Table of Contents

What You Can Do as a PPMS User:	2
PPMS Account Creation:	3
Profile:	7
View User, Group, and PI information:	7
View Financial Account Information:	8
Request Authorization to use a COA:	9
Search For Existing COA:	10
COA Creation:	12
What to Do if COA Authorization Is Still Pending:	13



What You Can Do as a PPMS User:

Users can schedule time to use instruments and book services at one or more cores

User types:

- **Novice:** The user can only book during the peak hours defined in the instrument Configuration
- **Autonomous:** The user can book the instrument at any available time
- **Super-User:** The user is allowed to organize trainings, validate and manage incidents, book on behalf of other users, etc.
 - The Super-User must first be defined as an Autonomous user, and then as a Super-User
 - **Note:** When a user requests an account creation, the validation process will redirect the admin to the user rights definition allowing a fast update

Yale users have the following access rights:

- Request Account Authorization for Chart of Accounts (COA)
- Request Services and Schedule Instruments - depending on training level

User skill level is normally set to Autonomous



PPMS Account Creation:

1. Click [YalePPMS](#) to go to the Yale University PPMS Start Page
2. Select the Facility you want to use (ex: CCMi Confocal in YSM)

Yale University PPMS

Start Page

Start page

Search ...

Facilities available in Yale School of Medicine:

- CCMi Confocal (CCMI_CFL) details
- Chemical Metabolism Core (CMC) details
- Cytometry by Time of Flight (CyTOF) details
- Keck Microarray, Single Cell and Spatial Genomics Shared Resource (Microarray) details
- Stem Cell Core (SCC) details
- YSM Biorepository (Deans) (YSM_BioRep) details
- Yale Flow Cytometry (YFC) details

Facilities available in Yale University (non-YSM):

- Catalysis and Separation Core (CSC) details
- Chemical and Biophysical Instrumentation Center (CBIC) details
- Science Hill Flow Cytometry (SHFC) details
- WTI BrainWorks (BW) details
- West Campus Flow Cytometry Core (WCFC) details
- West Campus Imaging Core (WCIC) details
- Yale Analytical and Stable Isotope Center (YASIC) details
- Yale Glassblowing Laboratory (YGL)

My PPMS dashboard:

- My PPMS: for an overview of your activity and pending requests system-wide (on all facilities).

Public Documents

- External user account creation guide
- External user password change guide
- Who approves my COA??? Look up Cost Center Managers here:
- Yale Internal User - Quick Start Guide

3. Select “user account creation request”

Yale University PPMS for the CCMi Confocal - CCMi_CFL

Home Account creation request Schedules Statistics Logout

Login

Login with your Yale credentials (for Yale users)

Login with your PPMS credentials (for external users)

- If you do not have an account yet, you can fill in a user account creation request
- If you cannot login or have any trouble please contact: CCMi_CFL facility, email:mateus.guerra@yale.edu, phone:12037853793
- This core facility management system is also used by other core facilities. Change core facility.
- You can also view a list of public documents



4. Select "Continue"

Yale University PPMS for the CCMI Confocal - CCMI_CFL

Home Account creation request Schedules Statistics Logout

My Documents

Title:
Who approves my COA??? Look up Cost Center Managers here:

Details:
Document #25
Created on 08/08/2023 at 11:14am
last updated on 08/09/2023 at 11:09am by Stratocore Support

Document content :

Please utilize the link provided below to identify the entity responsible for authorizing COA within your Department. Upon entering the COA Cost Center, you will be presented with a roster of account managers. Feel free to send a follow-up email to the appropriate account manager for further assistance.

<https://ppms.us/yale/reports/#report-7510>

Continue

5. Select "Your institution is Yale University"

Yale University PPMS for the CCMI Confocal - CCMI_CFL

Home Account creation request Schedules Statistics Logout

PPMS accounts on this system are used by the following facilities: Yale Flow Cytometry (YFC), Yale Glassblowing Laboratory (YGL), Yale Analytical and Stable Isotope Center (YASIC), West Campus Imaging Core (WCIC), WTI BrainWorks (BW), Chemical and Biophysical Instrumentation Center (CBIC), CCMI Confocal (CCMI_CFL), Cytometry by Time of Flight (CyTOF), Stem Cell Core (SCC), West Campus Flow Cytometry Core (WCFC), Science Hill Flow Cytometry (SHFC), Keck Microarray, Single Cell and Spatial Genomics Shared Resource (Microarray), Chemical Metabolism Core (CMC), YSM Biorepository (Deans) (YSM_BioRep), Catalysis and Separation Core (CSC).

Important:
If you have a PPMS account that does not work anymore or may have been deactivated, please do NOT fill out this form, please contact an administrator for assistance: CCMI_CFL facility, email:mateus.guerra@yale.edu, phone:12037853793.
If you do not remember your password, you can follow these instructions.

Please choose one of the following options:

Your institution is Yale University
 Your institution is not Yale University



6. Fill out your Yale NetID login information

Central Authentication Service

[Manage NetID Account](#)

Sign In

Make sure your session is secure

Before entering your NetID and password, verify that the URL for this page begins with:

https://secure.its.yale.edu

To protect your privacy, quit your web browser when you are finished with your session

NetID

Password

[Forgot My Password](#)

SIGN IN

Yale

Copyright © 2024 Yale University. All Rights Reserved.

7. Fill in the information that has a red asterisk (*) beside it

Home [Account creation request](#) [Schedules](#) [Statistics](#) [Logout](#)

PPMS user account creation form

PPMS accounts on this system are used by the following facilities: Flow Cytometry (FC), Macromolecular X-Ray Crystallography (MXC), Yale Glassblowing Laboratory (YGL), Yale Analytical and Stable Isotope Center (YASIC), West Campus Imaging Core (WCIC).

Important:
If you have a PPMS account that does not work anymore or may have been deactivated, please do NOT fill out this form, please contact an administrator for assistance: FC facility, email:lesley.devine@yale.edu, phone:203.737.7451.

Please choose one of the following options:

Your institution is Yale University
Your institution is not Yale University

Please enter your details below (*) required fields

Credentials for Yale School of Medicine:
js842 (logout)

First name: *

Last name: *

Phone: *

Financial Account number: (optional)

Group: *

Select a group filter
My group is NOT in the list



8. An administrator will receive an email notifying them that you've submitted an account creation request
 - a. **Note:** If your account has not been authorized within a few days of request, please email PPMS@yale.edu

Home [Account creation request](#) Schedules Statistics Logout

Account creation request

Your account creation request status

Your account creation request (ref. #295) has been successfully recorded and will need to be validated by an administrator.

While your request is awaiting validation

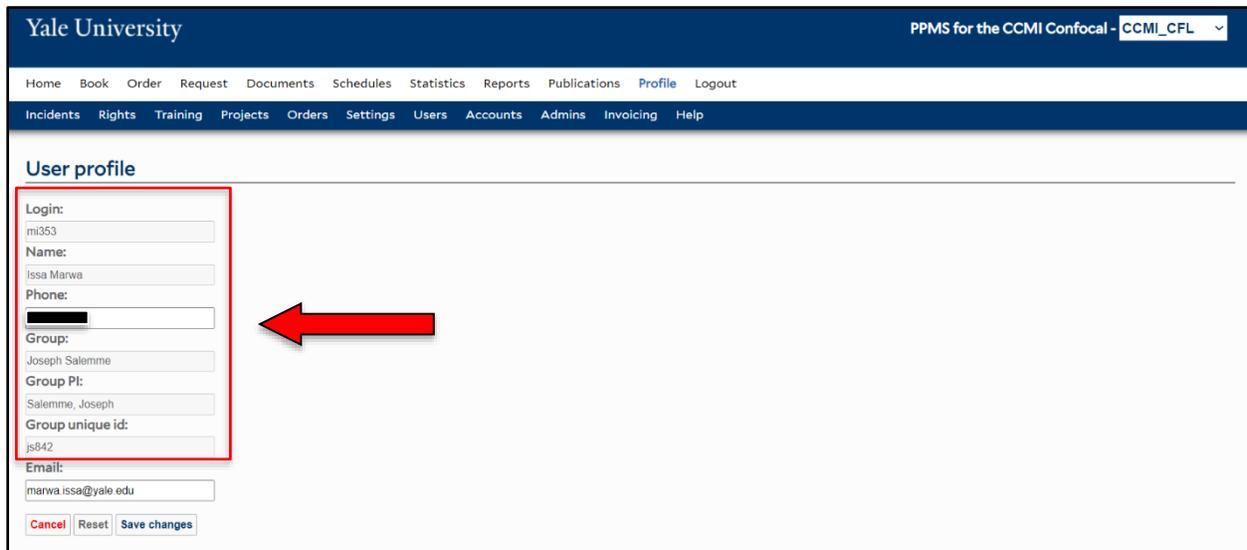
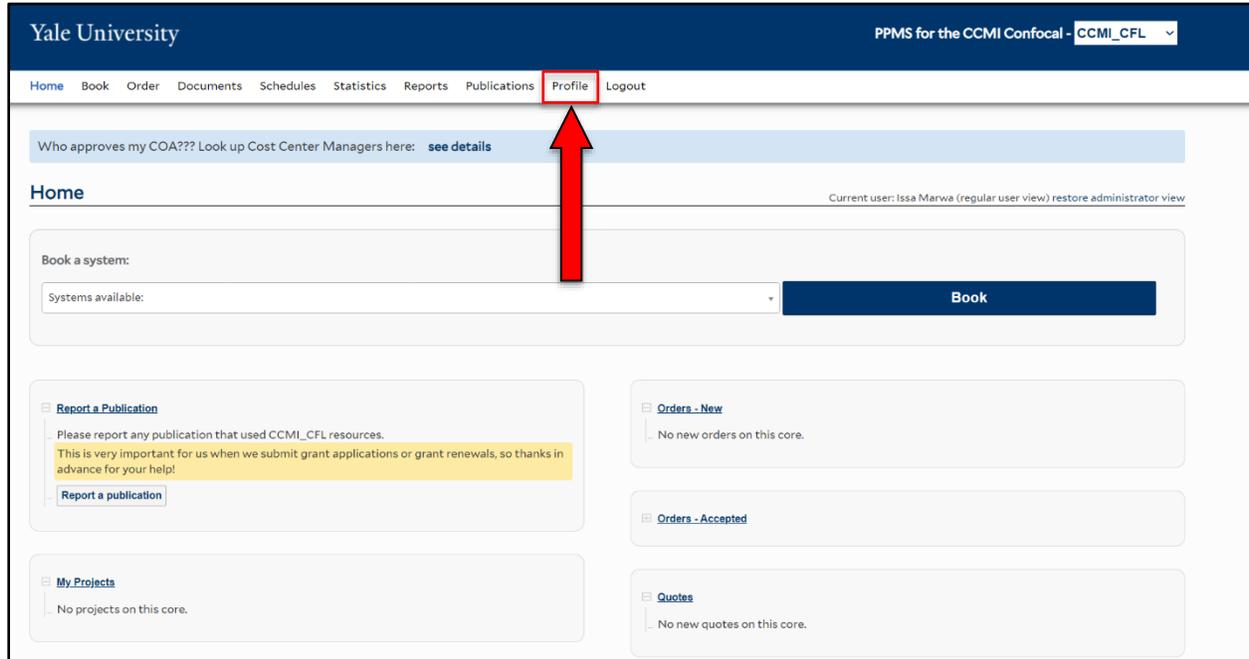
To request training please fill out the form at the following URL:
<https://ppms.us/yale/req/?pf=8>



Profile:

View User, Group, and PI information:

1. Login to PPMS
2. Select “Profile”



3. If the User or Group/PI information is **incorrect**, email your core administrator at PPMS@yale.edu
 - a. **Note:** You can only be associated with 1 Group at a time, but you can have authorization to use multiple COAs if you work for multiple Groups



View Financial Account Information:

1. To see individual COA and split accounts that are authorized for your use, scroll down in the Profile page to the “Financial Accounts available for use:” section

Home Book Order Request Documents Schedules Statistics Reports Publications Profile Logout

Incidents Rights Training Projects Orders Settings Users Accounts Admins Invoicing Help

Financial Account Information

Default Financial Account Number:

js842

Request authorization to use a financial account:

New account authorization request

Request authorization to manage a financial account:

New account management request

Financial Accounts available for use:

No account available to use.

Code-based authentication and 2-factor setup

Setup or configure code-based authentication and 2-factor login

User files

No files

Create an API2 Key

2. Verify that the COA(s) you wish to use are listed in your list of available accounts
 - a. If no account is available to use, proceed to the next section
 - b. 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, scroll down in the Profile page to the “Financial Accounts Information” section
2. Select “New account authorization request”

The screenshot shows the 'Financial Account Information' section of a user profile. The navigation bar at the top includes: Home, Book, Order, Request, Documents, Schedules, Statistics, Reports, Publications, Profile, Logout. Below the navigation bar, the section title is 'Financial Account Information'. Underneath, there are several sections:

- Default Financial Account Number:** A text input field containing 'js842'.
- Request authorization to use a financial account:** A button labeled 'New account authorization request' is highlighted with a red box and a red arrow pointing to it.
- Request authorization to manage a financial account:** A button labeled 'New account management request'.
- Financial Accounts available for use:** A section with the text 'No account available to use.'
- Code-based authentication and 2-factor setup:** A button labeled 'Setup or configure code-based authentication and 2-factor login'.
- User files:** A section with the text 'No files'.

At the bottom of the section, there is a button labeled 'Create an API2 Key'.

3. Select an account type

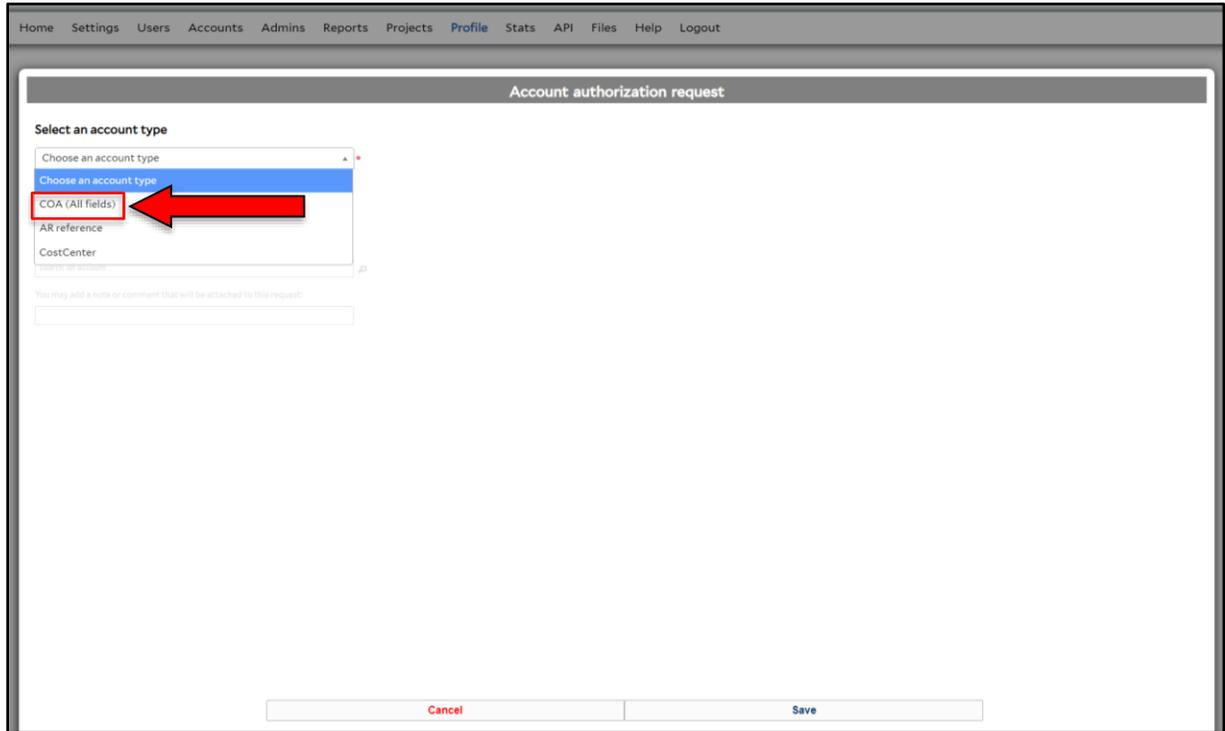
The screenshot shows a dialog box titled 'Account authorization request'. The navigation bar at the top includes: Home, Settings, Users, Accounts, Admins, Reports, Projects, Profile, Stats, API, Files, Help, Logout. The dialog box contains the following elements:

- Select an account type:** A dropdown menu with the text 'Choose an account type' is highlighted with a red box and a red arrow pointing to it.
- Type Description:** A section with a text input field.
- Select or create an account:** A section with a text input field labeled 'select an account'.
- You may add a note or comment that will be attached to this request:** A text input field.

At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.

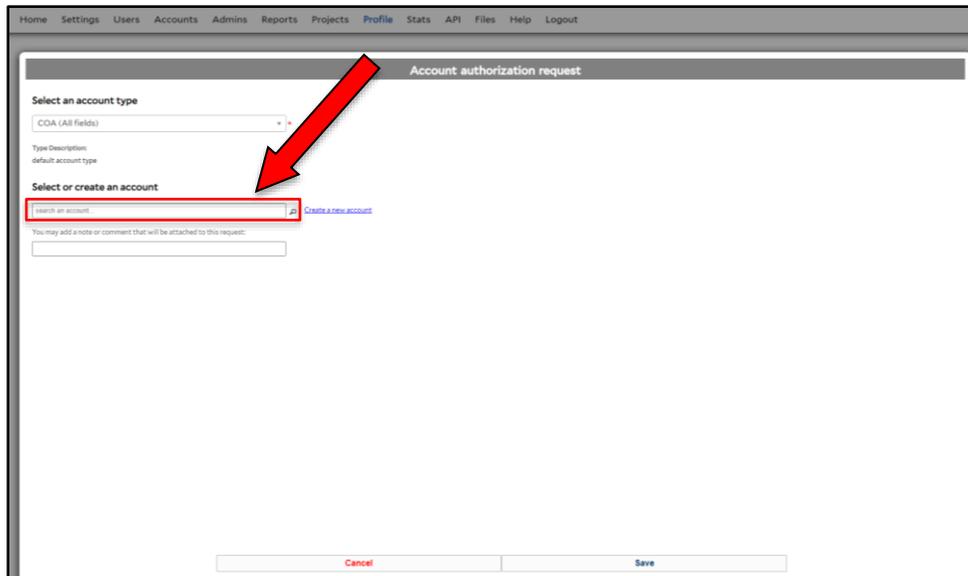


4. Select “COA (All fields)”



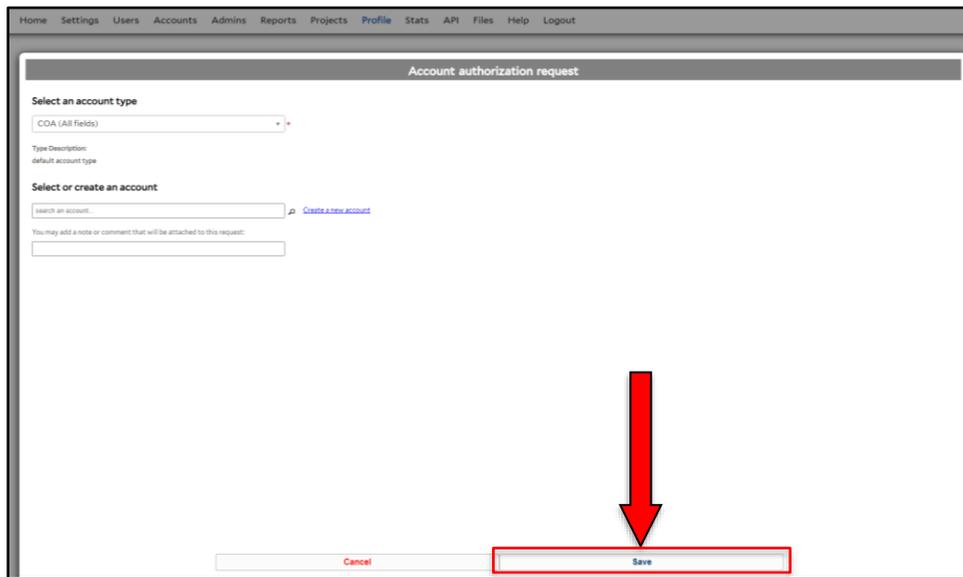
Search For Existing COA:

1. Search for the account you wish to use (the account information should have already been provided to you if you are authorized to use an existing account)
 - a. **Note:** If you can't find the account, or need to create one, skip the rest of this section and proceed to [“COA Creation”](#)

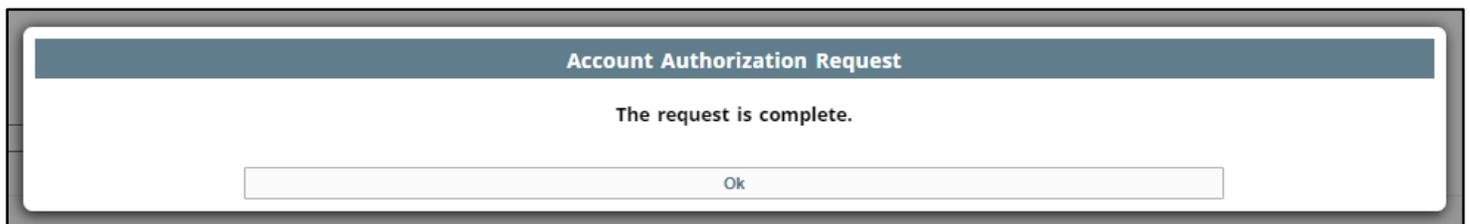




2. After selecting the COA, click on the **Save** button below
 - a. **Note:** The COA will be validated in real time and the system will only accept a COA with valid segment information
 - b. **Note:** Only the business office can approve COAs. Unfortunately, core facility staff are unable to add any 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
 - c. **Note:** 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



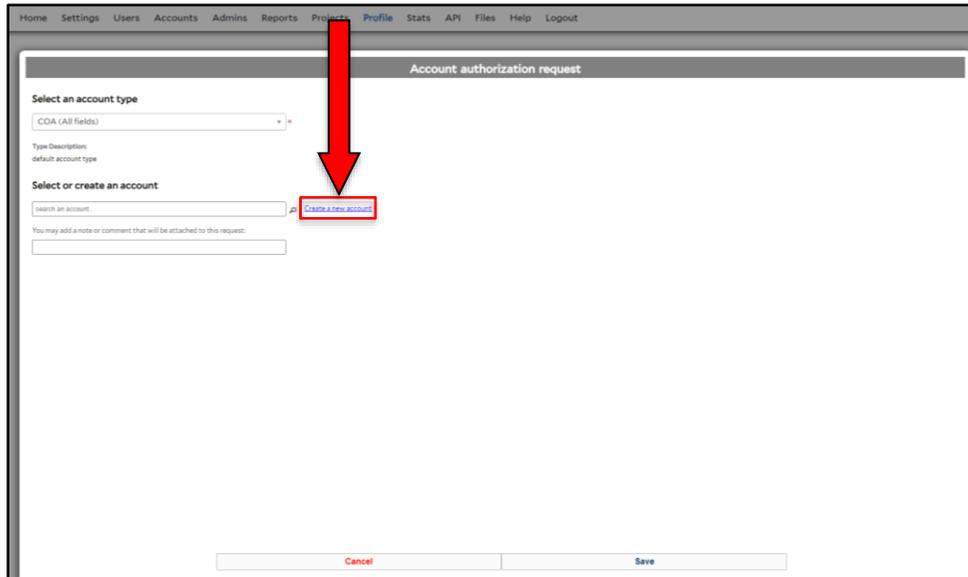
3. After selecting Save, the request will be automatically forwarded to the Lead Administrator in the business office of the department responsible for this COA
 - a. **Note:** Once the Lead Administrator has approved your ability to use this COA, your PPMS account will become fully active. If your Lead Administrator has not yet authorized access, then please contact them at PPMS@yale.edu for further assistance (see section “**What to Do if COA Authorization Is Still Pending**” for more information)



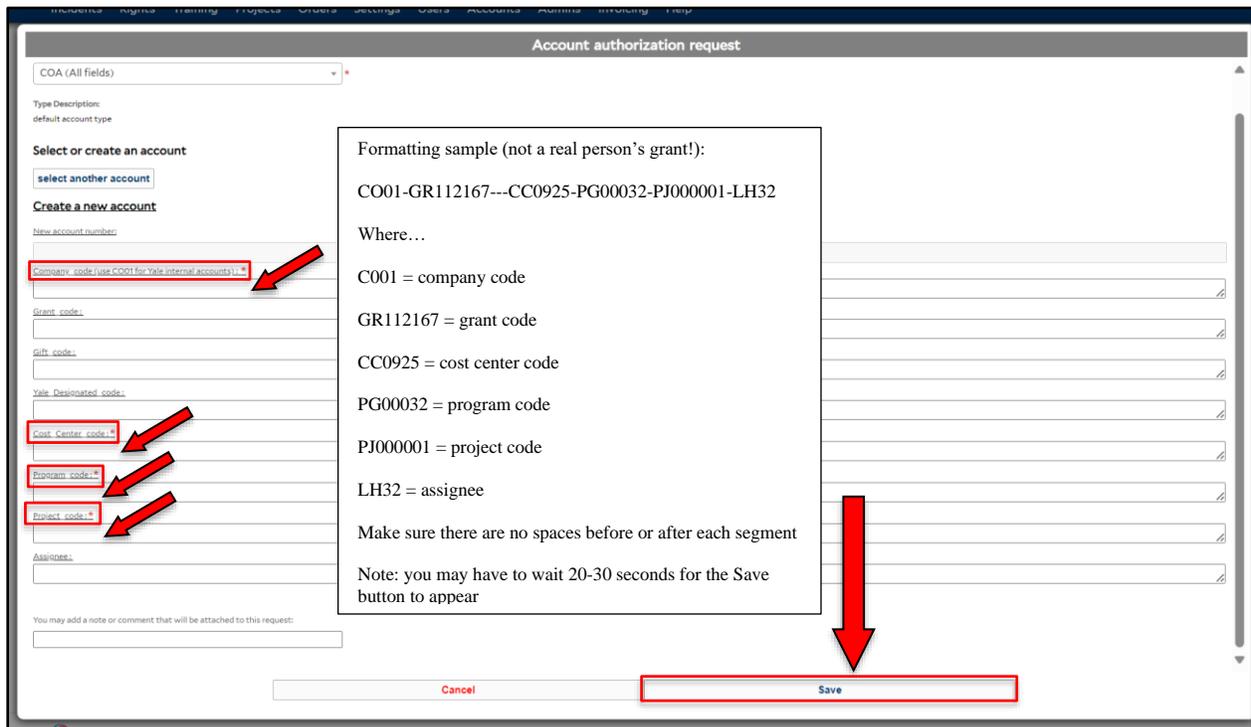


COA Creation:

1. Select “Create a new account”



2. Fill out the information that has a red asterisk (*) next to it

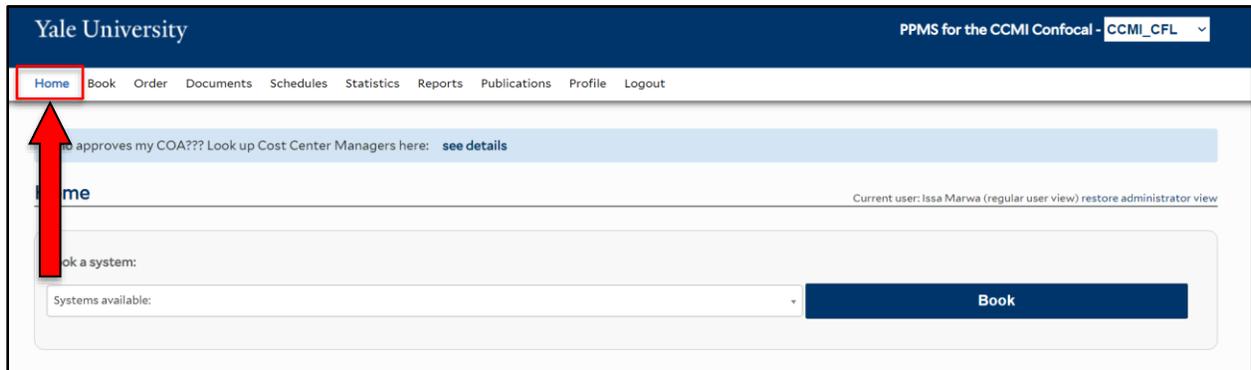




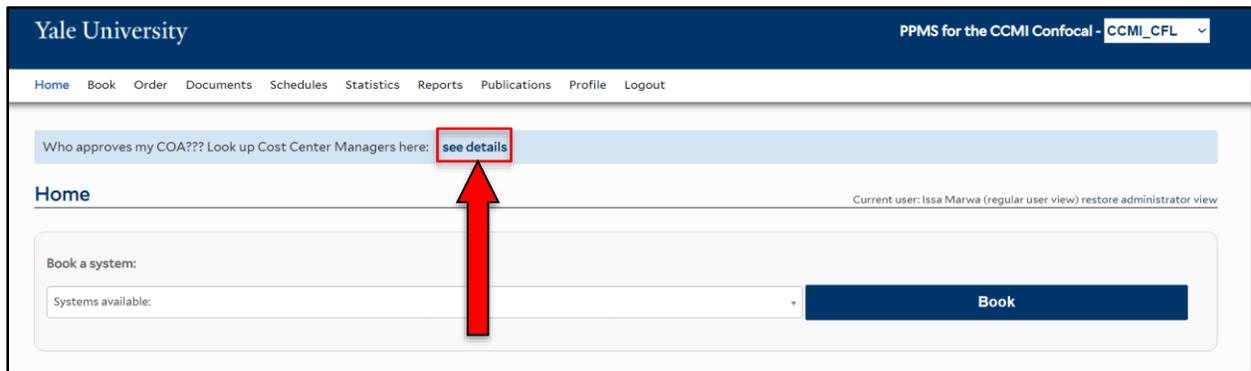
What to Do if COA Authorization Is Still Pending:

If no response is received within a few days, contact your account manager by following these steps:

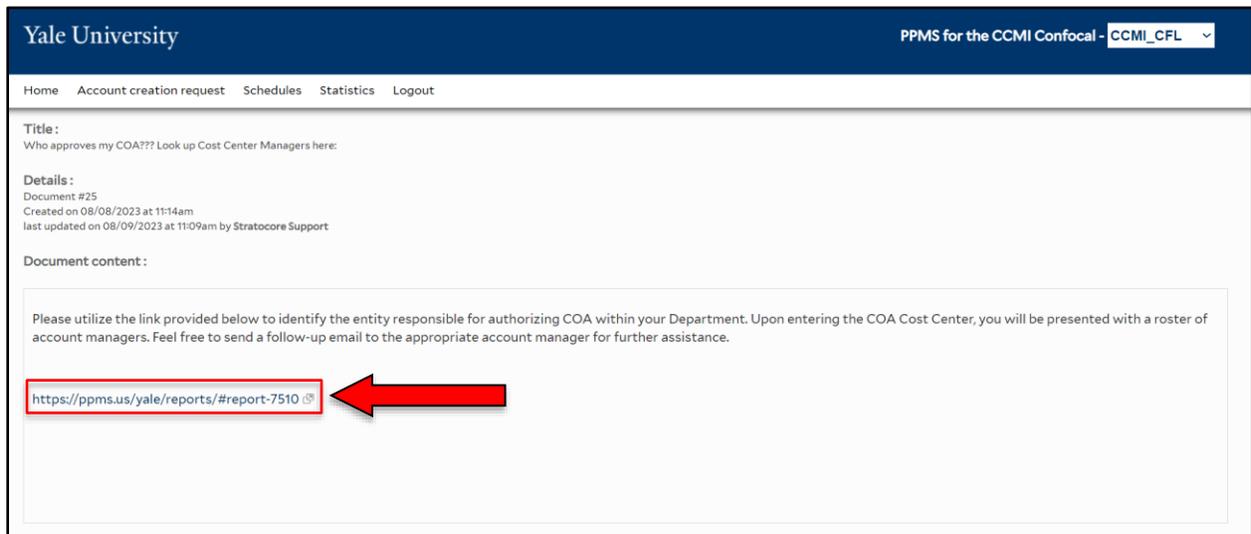
1. Go to “Home”



2. Select “see details” after “Who approves my COA???”



3. Click the link under “Document content:”





4. Scroll through the “cost center” column and search for your department

Yale University PPMS for the CCMi Confocal - CCMi_CFL

Home Book Order Request Documents Schedules Statistics **Reports** Publications Profile Logout

Incidents Rights Training Projects Orders Settings Users Accounts Admins Invoicing Help

Reports

Show Reports

Cost Center Managers

Report of cost center managers

Run/refresh report

Show entries [Clear All Filters](#) [Select Current Page](#) [Unselect All](#) [Expand](#) [Size To Fit](#) [AutoSize](#) [Export Selection](#) [Export](#)

<input type="checkbox"/> Cost Center	Managers who can approve	Email List
<input type="checkbox"/>	Kellerman Kelly	kelly.kellerman@yale.edu
<input type="checkbox"/> CC0001 HOSBUS Business Office	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0004 HOSDIN Berkeley	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0005 HOSDIN BranSay	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0006 HOSDIN Hopper	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0007 HOSDIN Freshmen Commons	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0008 HOSDIN Davenport	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0009 HOSDIN Ezra Stiles & Morse	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0010 HOSDIN Jonathan Edwards	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0011 HOSDIN Pierson	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu

Home Book Order Request Documents Schedules Statistics **Reports** Publications Profile Logout

Incidents Rights Training Projects Orders Settings Users Accounts Admins Invoicing Help

<input type="checkbox"/> CC0023 HOSAUX Health Center Cafe	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0024 HOSAUX Health Center Dining Hall	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0025 HOSAUX Cafe Med	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0026 HOSAUX Norfolk	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0027 HOSAUX Widdy's	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0028 HOSAUX Vending	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0029 HOSAUX Auxiliary Administration	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0030 HOSAUX Divinity Cafe	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu
<input type="checkbox"/> CC0031 HOSAUX Graduate School Dining Hall	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu
<input type="checkbox"/> CC0032 EHSEHS Environmental Health and Safety	Nancy	michael.kaseta@yale.edu;nancy.scanlon@yale.edu
<input type="checkbox"/> CC0034 FACOPS VP Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu
<input type="checkbox"/> CC0035 FACOPS Grounds Maintenance Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu
<input type="checkbox"/> CC0036 FACPLA Physical Plant Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu
<input type="checkbox"/> CC0037 FACOPS Business Office Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu
<input type="checkbox"/> CC0038 FACCUS Custodial Services Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu
<input type="checkbox"/> CC0039 FACCAP Capital Project Management	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu



5. The CC number corresponds with the cost center segment in your COA

Home	Book	Order	Request	Documents	Schedules	Statistics	Reports	Publications	Profile	Logout
Incidents	Rights	Training	Projects	Orders	Settings	Users	Accounts	Admins	Invoicing	Help
<input type="checkbox"/>	CC0023	HOSAUX Health Center Cafe	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0024	HOSAUX Health Center Dining Hall	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0025	HOSAUX Cafe Med	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0026	HOSAUX Norfolk	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0027	HOSAUX Widdy's	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0028	HOSAUX Vending	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0029	HOSAUX Auxiliary Administration	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0030	HOSAUX Divinity Cafe	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0031	HOSAUX Graduate School Dining Hall	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0032	EHSEHS Environmental Health and Safety	Kaseta Michael, Scanlon Nancy	michael.kaseta@yale.edu;nancy.scanlon@yale.edu						
<input type="checkbox"/>	CC0034	FACOPS VP Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0035	FACOPS Grounds Maintenance Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						
<input type="checkbox"/>	CC0036	FACPLA Physical Plant Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0037	FACOPS Business Office Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						
<input type="checkbox"/>	CC0038	FACBUS Custodial Services Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0039	FACCAP Capital Project Management	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						

6. Use the email in the email list column associated with your cost center segment and email your account manager(s) to say that you have not yet received access

Home	Book	Order	Request	Documents	Schedules	Statistics	Reports	Publications	Profile	Logout
Incidents	Rights	Training	Projects	Orders	Settings	Users	Accounts	Admins	Invoicing	Help
<input type="checkbox"/>	CC0023	HOSAUX Health Center Cafe	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0024	HOSAUX Health Center Dining Hall	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0025	HOSAUX Cafe Med	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0026	HOSAUX Norfolk	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0027	HOSAUX Widdy's	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0028	HOSAUX Vending	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0029	HOSAUX Auxiliary Administration	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0030	HOSAUX Divinity Cafe	Courtney Dana, Russo Donald	donald.russo@yale.edu;dana.cirillo@yale.edu						
<input type="checkbox"/>	CC0031	HOSAUX Graduate School Dining Hall	Courtney Dana, Russo Donald	dana.cirillo@yale.edu;donald.russo@yale.edu						
<input type="checkbox"/>	CC0032	EHSEHS Environmental Health and Safety	Kaseta Michael, Scanlon Nancy	michael.kaseta@yale.edu;nancy.scanlon@yale.edu						
<input type="checkbox"/>	CC0034	FACOPS VP Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0035	FACOPS Grounds Maintenance Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						
<input type="checkbox"/>	CC0036	FACPLA Physical Plant Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0037	FACOPS Business Office Admin	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						
<input type="checkbox"/>	CC0038	FACBUS Custodial Services Admin	Kaufhold John, Zotto Stephen	steve.zotto@yale.edu;john.kaufhold@yale.edu						
<input type="checkbox"/>	CC0039	FACCAP Capital Project Management	Kaufhold John, Zotto Stephen	john.kaufhold@yale.edu;steve.zotto@yale.edu						