

UC Davis Researchers: Quick-Start Guide to Stratocore PPMS (BRSR Specific)

Request Stratocore PPMS user account creation or use an existing Stratocore PPMS account

Each user (faculty, staff, student, or finance admin) will need to request an account in Stratocore PPMS. Each user account in Stratocore PPMS allows access to all facilities in Stratocore PPMS – users who have previously created an account for another facility do NOT need to create another account.

1. Go to **Stratocore PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the Biorepository Shared Resource under "Facilities available in UC Davis:"
3. Below the log in boxes, select the first bulleted link for **user account creation request**
4. At the PPMS user account creation form
Select the option >> "Your institution is UC Davis"
You will be directed to the UC Davis log-in screen if you are not already signed in to a UCD application.
Log in using your UC Davis Kerberos (CAS) credentials.
You will be returned to the PPMS form with expanded questions.

3. Enter your details on the PPMS user account creation form:
 - First Name
 - Last Name
 - Phone Number
 - *Please note, the fields for email and login will be prepopulated based on your CAS Login – **please DO NOT change these fields.**

Login

Login with your UC Davis credentials (for UC Davis 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: ppms@ucdavis.edu
- This core facility management system is also used by other core facilities. Change core facility.
- You can also view a list of public documents

UCDAVIS RESEARCH CORE FACILITIES PROGRAM

PPMS for the Campus Mass Spectrometry Facility - CMSF

Home Account creation request Logout

PPMS user account creation form

PPMS accounts on this system are used by the following facilities: Bioinformatics Core Facility (BIOINFO), Center for Molecular and Genomic Imaging (CMGI), Interdisciplinary Center for Plasma Mass Spectrometry (ICPMS), DNA Technologies & Expression Analysis Cores (DNATech), NMR Facility (NMRF), West Coast Metabolomics Center (METABOL), Bioinformatics Core - High Performance Computing (HPCore), Campus Mass Spectrometry Facility (CMSF), Controlled Environment Facility (CEF).

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: ppms@ucdavis.edu.
If you do not remember your password, you can follow these instructions.

Please choose one of the following options:

Your institution is UC Davis

Your institution is NOT UC Davis

Please enter your details below (*: required fields)

First name: *

Last name: *

Phone: *

Email: @ucdavis.edu *

4. Financial Account Number

**Campus requires you to list a default financial account number. If a financial account number is not specified prior to invoicing, your default account will be charged.*

This number can be changed any time, and you may add multiple accounts to your profile, once your user account is established.

Add your financial account number by clicking in the "Financial Account Number" box – an "Account Number Request" page will pop open.

Click in the "search an account" box beneath "Select or create an account"

Begin typing your financial account number*

*Financial account numbers follow the format X-XXXXXXX with a mixture of numbers and capital letters (a 5-character SubAccount may be included at the end.)

Previously validated numbers will appear in a drop-down list as you begin typing. Select the appropriate account from the list.

If the account number is not found in the list, select >> Create a new account (approval will be required), to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately.

Helpful Notes:

a. If the error message stating "Warning: this account number is not valid" is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.

b. "An admin will have to validate the creation of this account" should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

Select Save

5. User Category

Choose the appropriate role:

Investigator, Lab Manager, Lab Personnel (Staff/Student)

6. Group

Choose your lab group by typing your Principal Investigator's last name in the filter box, directly in the drop down, or by scrolling through the list of established groups - sorted by department.

If your lab group is not found, create your group following the steps below:

Select >> "My Group is NOT in the list" and complete the required fields.

- Group name = PI Last Name, PI First name
- Group director or PI = PI Last Name, PI First name (again)
- Group director or PI email = PI email (UC Davis email)
- Group administrator/financial contact name = person who manages the financial accounts and grants for the PI (often the department financial manager)
- Group administrator/financial contact email
- Group administrator/financial contact phone
- Account Payable Email = optional, may list another contact other than the finance contact if desired
- Department = PI's department

7. Group Management

Check this box if you are the Investigator, Finance Admin, or Lab Manager for the group.

8. Submit form and await an email verification of your PPMS account.

Information is reviewed by the facility admin and approval can take a few business days.

Group name (PI Lastname, PI Firstname)

 *

Group director or PI name: (Lastname, Firstname)

 *

Group director or PI email:

@ucdavis.edu *

Group administrative/financial contact name:

 *

Group administrative/financial contact email:

@ucdavis.edu *

Group administrative/financial contact phone:

Account Payable Email (optional):

Group default financial account number:

Affiliation:

 *

Department:

 *

Group management:

I request management rights for this group

**Please contact
ppms@ucdavis.edu with
 questions or concerns about
 account creation or approval.**

Cancer Center Full & Associated Member – Access to Subsidized Rates

Cancer Center Members requesting access to subsidized service and instrument rates will need to first create a project **before** requesting services or reservations. Services and reservations requested without using an approved cancer-center project will not be subsidized. Note that not all cores in PPMS offer Cancer-Center member subsidies: check with the core for additional information.

Each project is specific to a core. A new project must be requested for each core for which the subsidy is accessed.

REQUEST A PROJECT

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
- Select the core of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
- From REQUEST, fill out the Project Creation Request form: BRSR Cancer Center Project Subsidy Form
 - Project Title
 - Project Description
 - Financial Account Number
 - Membership Status (Full, Associated, Non-Member)*
 - Cancer-related research*
 - *Please answer these questions as accurately as possible. This will ensure you receive the appropriate pricing.
 - Grant & Funding information
 - Group & Member information
- Click "Submit request"

Your request will be sent to the Core for approval. Once approved, you will receive an email notification and be able to view your project on your homepage under "My Projects."

Use this Cancer-Center project when requesting services and reservations to ensure access to subsidized rates.



Pathology Member – Access to Subsidized Rates & Slide or Block Pulls

Pathology members requesting access to subsidized service and instrument rates will need to reference their specific project when requesting services or reservations. Services and reservations requested without using an approved pathology project will not be subsidized.

- Each Pathology PI will have a project titled "PI Last Name, PI First Name Subsidy" for access to subsidy rates.
- Each Pathology PI will have access to the project "Pathology Slide or Block Pull" to access fully funded pulls.

REQUEST SERVICES

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
- Select the core of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
- From HOME or ORDER select >> "Order a service or consumable" and choose from drop-down menu. Click the "Order" box.
- [Optional] Select the appropriate project in the "Attach this order to this project*" dropdown
 - * Cancer-Center & Pathology members should select the project approved for subsidized rates
 - *Pathology members requesting Slide or Block Pull should select the project approved for pulls
- Select the appropriate financial account for the order (if more than one account is available)
- Services and consumables available for order
 - Add "Quantity" of 1 on the appropriate service line.
 - to communicate additional information to core staff
- Review quantities and service and click "Order" at bottom left.
- Confirm by clicking OK.
- Fill out the form on the next screen
- Review provided information
 - Select "Submit form" at the bottom of the page
 - Review, change funding, print, or cancel the order upon creation.

NOTE: Stratocore PPMS is NOT rated for HIPAA compliance. Please DO NOT enter any Protected Health Information (PHI) into any comments or forms within Stratocore PPMS. PHI data should only be shared through secure forms of communication (ex. secure email)

Type of Service Request	Min	Max	Intra	Unit price	Quantity	Price
#090200 Block/Slide/Thin-section (TMA/Sections of TMA) add a comment	1	1	1	0.00	0	0.00
#090202 Block Pull add a comment	1	1	1	0.00	0	0.00
#090201 Fresh/Frozen Tissue add a comment	1	1	1	0.00	0	0.00
#090204 Provide your own specimen (wet tissue, blocks and slides) add a comment	1	1	1	0.00	0	0.00
#090203 Slide (CC OCR Only) add a comment	1	1	1	0.00	0	0.00
TOTAL					Quantity	Price
					0	0.00

To continue with your order, please answer the questions below:

Notice to All Principal Investigators:

This resource is funded by the UC Davis Comprehensive Cancer Center Support Grant (CCSG) awarded by the National Cancer Institute (NCI P30CA093373). Publications that have utilized facility resources, services or scientific data generated by the resource should acknowledge the resource or the assistance provided by resource staff and cite the NCI CCSG grant. An electronic copy of the publication should also be sent to the resource directors.

Please read the NIH public access policy: <http://publicaccess.nih.gov/>

Instructions:

Unit price	Quantity	Price
\$8.00	1	\$8.00
	Quantity	Price
	1	\$8.00

Change Default Financial Account

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the facility of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
3. From HOME >> PROFILE
Under the Financial Account Information section >> "Default Financial Account Number" >> Select "Change your default account number"
4. Under "Please enter the new account number," click inside the text box
5. An "Account Number Request" page will pop up.
Click in the "search an account" box beneath "Select or create an account"
Begin typing your financial account number.
*Financial account numbers follow the format X-XXXXXXX

Previously validated numbers will appear in a drop-down list as you begin typing. Select the appropriate account from the list.

If the account number is NOT found in the list, select >> **Create a new account (approval will be required),** to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately. (A 5-character SubAccount may be included as well if you have one.)

Helpful Notes:

a. If the error message stating "Warning: this account number is not valid" is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.

b. "An admin will have to validate the creation of this account" should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

6. Click "Save"

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

Group/Account Management

Financial Account Information

Default Financial Account Number:

Finance Admin

[Change your default account number](#)

UC DAVIS RESEARCH CORE FACILITIES PROGRAM PPMS for the DNA Technologies & Expression Analysis Cores - DNATech

Home Book Order Documents Schedules Statistics Reports Publications Profile Logout

Group/Account Management

Request account number modification

Please enter the new account number:

[submit account number modification request](#)

UC DAVIS RESEARCH CORE FACILITIES PROGRAM PPMS for the DNA Technologies & Expression Analysis Cores - DNATech

Home Book Order Documents Schedules Statistics Reports Publications Profile

Account number request

Account type

Type name:
UC Davis KFS accounts

Type Description:

Select or create an account

search an account...

[Create a new account](#)

Account number request

UC Davis KFS account

Type Description:

Select or create an account

[select another account](#)

Create a new account

New account number:

Chart (3, S, L, H, P, M, or N. Please do not include a-j): *

Account (7 Characters): *

SubAccount (5 Characters):

Project (5 Characters):

[Cancel](#) [Save](#)

Add Additional Financial Accounts

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the facility of interest under "Facilities available in UC Davis" and log in with your UC Davis credentials
3. From HOME >> PROFILE under the Financial Account Information section >> "Request authorization to **USE** a financial account" >> select "**New account AUTHORIZATION request**"
4. An "Account Number Request" page will pop up. Click in the "search an account" box beneath "Select or create an account" Begin typing your financial account number.
*Financial account numbers follow the format X-XXXXXXX

Previously validated numbers will appear in a drop-down list as you begin typing. Select the appropriate account from the list.

If the account number is NOT found in the list, select >> **Create a new account (approval will be required),** to the right of the search, you will be taken to another account number request page where you will enter your Chart (1 character) and Account (7 characters) separately. (A 5-character SubAccount may be included as well if you have one.)

Helpful Notes:

a. If the error message stating "Warning: this account number is not valid" is still showing after entering your account info, click into the Project field box and wait a few seconds. The error should disappear and you may now Save.

b. "An admin will have to validate the creation of this account" should not stop you from saving the account info. The Core will validate this financial account as they approve your account request.

5. Click "Save"