

External Customers: Quick-Start Guide to Stratocore PPMS

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

Each customer will need to request an account in Stratocore PPMS. Existing accounts created for one facility in Stratocore PPMS are valid at all other facilities using Stratocore PPMS.

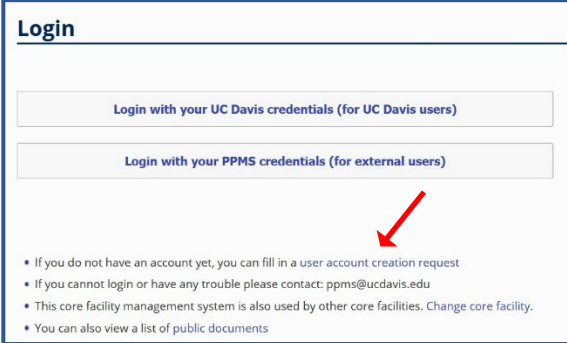
1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis
3. Below the log in boxes, select the first bulleted link for **user account creation request**
4. At the PPMS user account creation form
Select the >> **Your institution is NOT UC Davis**
5. Enter your details on the PPMS user account creation form
 - First Name, Last Name, Phone Number, Email Address
6. Financial Account Number
 - **Other UCs (REQUIRED):** Add your financial IOC chartstring (*Add'l details at the end of this document*)
 - **External Non-Profit & For-Profit (OPTIONAL, unless otherwise stated*):** For most facilities, this field is **not required** to be filled out for external NP and FP customers

*If a facility requires this OR you wish to have a Purchase Order number listed on your invoices, add your Revenue Agreement or Purchase Order Number.

Click in the Financial Account Number box – an Account Number Request page will pop open.

Select an account type: Purchase Order, UCD Revenue Agreement, or specific other UC.

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



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

ppms.us/ucdavis/areq/?pf=19

UC DAVIS 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 (DNA Tech), NMR Facility (NMR), West Coast Neurobiology 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: *

If your email exists in both a short and a long form, please use the short form (Use username@ucdavis.edu instead of firstname.lastname@ucdavis.edu)

Financial Account number: *

Begin typing your financial account number.

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

If the account number is not found in the list, select >> **Create this new account**, to the right of the search

Add a start date and end date to your account (Optional)

Select Save

7. User Category

Choose the appropriate role:
Investigator, Lab Manager, Lab Personnel (Staff/Student)

8. Password

Enter the password you want to use for your account

9. Group

Choose your group by typing Principal Investigator's (or main company contact) last name in the filter box, directly in the drop down, or by scrolling through the list of established groups sorted by department/institution/company

If your 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/main contact Last Name, First name
- Group director or PI = PI/ main contact Last Name, First name (again)
- Group director or PI email = PI/main contact email
- Group administrator/financial contact name = person who manages the financial accounts and grants for the PI/main contact/company
 - THIS IS AN IMPORTANT PERSON TO LIST CORRECTLY AS THIS FINANCIAL CONTACT WILL REVIEW CHARGES AND RESOLVE FINANCIAL ACCOUNT ISSUES
- Group administrator/financial contact email
- Group administrator/financial contact phone

Password you want to use: *

Retype password: *

- Do not use a dictionary based word, or a name
- Do not use series like 1234 or qwerty or abcd
- Try to use combinations of lowercase (a-z), uppercase letters (A-Z), numbers (0-9) and non-alphanumeric characters
- The non alphanumeric characters allowed are: ! " # \$ % & ' () * + , - . / : ; < - > ? @ [\] ^ _ ` { | } ~ and the space character

Group

Select a group filter

My group is NOT in the list ←

Group name (PI Lastname, PI Firstname) *

Group director or PI name: (Lastname, Firstname) *

Group director or PI email: *

Group administrative/financial contact name: *

Group administrative/financial contact email: *

Group administrative/financial contact phone: *

- Accounts payable email = optional, may list another contact other than the finance contact if desired
- Affiliation
 - Ext-UC (Other UC outside UC Davis)
 - Ext-Non-Profit
 - Ext-For Profit
- Institution
Select your institution or company from the list.
***If your institution is not in the list,** type your institution name directly in the text box
- Invoicing Address

Account Payable Email (optional):**Group default financial account number:****Affiliation:**

Select your affiliation below

*

Institution:

Select an Institution here

Invoicing address:

*

Group management: I request management rights for this group**Submit form**

10. Group Management

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

11. 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.

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

Change Default Financial Account

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis and log in with your email and password
3. From PROFILE under Default Financial Account Number Select Change your default account number.
4. Enter your password.
5. Under Please enter the new account number, click inside the text box - an Account Number Request page will pop open.
6. Select an account type from the drop-down list
 - Ext-UCs: Select your university
 - Ext-NP & FP: Select Purchase Order
7. Click in the "search an account" box beneath Select or create an account.

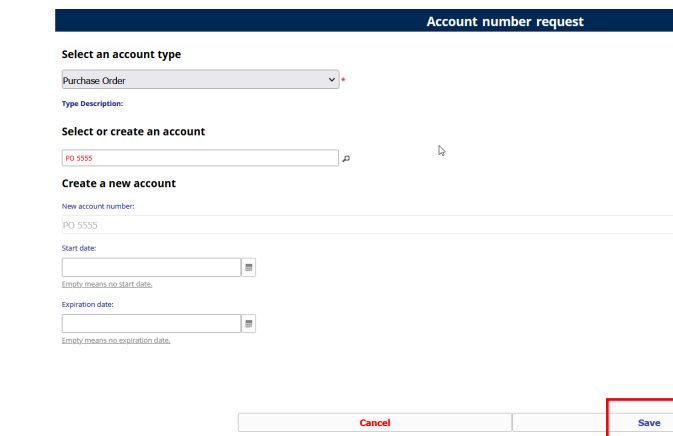
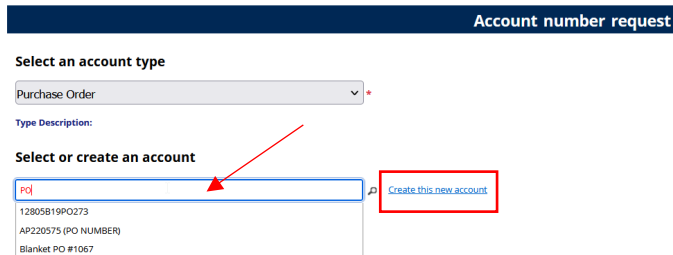
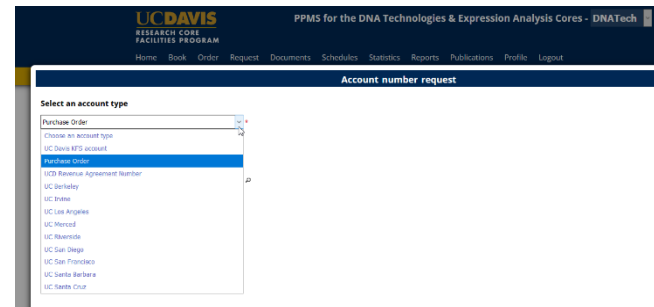
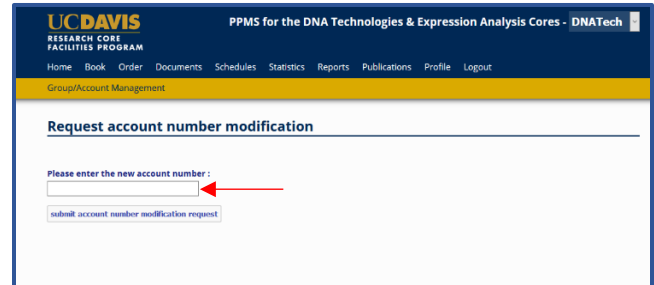
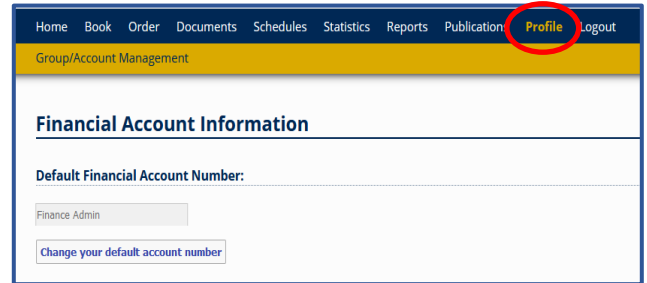
Begin typing your financial account number.

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

If the account number is not found in the list, select >> **Create this new account**, to the right of the search.

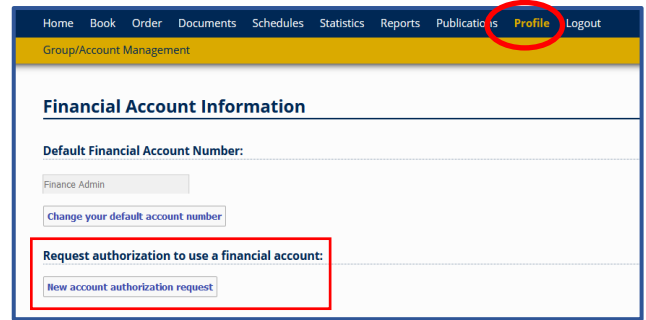
Add a start date and end date to your account. (Optional)

8. Click Save



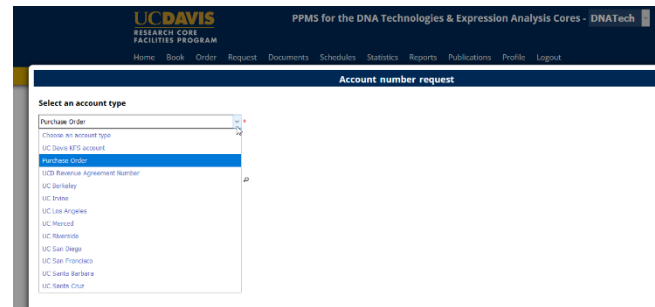
Add Additional Financial Accounts

1. Go to **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the core of interest under Facilities available in UC Davis and log in with your email and password
3. From PROFILE under Request authorization to USE a financial account, select New account authorization request.



4. Select an account type from the drop-down list
 - Ext-UCs: Select your university
 - Ext-NP & FP: Select Purchase Order
5. Click in the "search an account" box beneath Select or create an account.

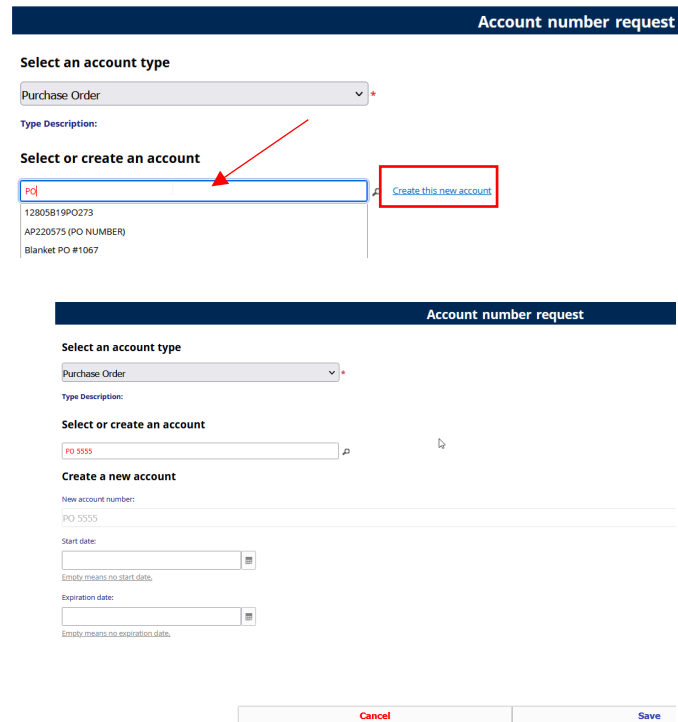
Begin typing your financial account number.



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

If the account number is not found in the list, select >> **Create this new account**, to the right of the search.

Add a start date and end date to your account. (Optional)



8. Click Save

External UC Intercampus Order Charge (IOC) Financial Chartstring Formats

If you are uncertain what your IOC chartstring is, please contact your group Finance admin.

<https://financeandbusiness.ucdavis.edu/finance/accounting-financial-reporting/intercampus/acct-strings>

Note: brackets () indicate the number of alphanumeric (AN) or numeric (N) characters required

UC Berkeley

Location (1) **1 or J**
 Account (5 - N)
 Fund (5 - N)
 Organization (5 - N)
 Program (2 - N)
 Project (6 - AN) **optional**
 Flex Field (5 - AN) **optional**

UC Irvine

Location (1) **9 or R**
 Account (7 – AN/N)
 Fund (5 - N) **optional**
 Sub (2 - N) **optional**
 Object (4 – AN/N)
 Reference (Up to 10 -AN) **optional**
 Source (Up to 6 – AN) **optional**
 Project (Up to 6 – AN) **optional**

UC Los Angeles

Location (1) **4 or M**
 Account (6 - N)
 Cost Center (2 - AN) **optional**
 Fund (5 - N)
 Project (up to 6) **optional**
 Sub (2 - N)
 Object (4 - N)
 Source (up to 6 - AN) **optional**

UC Santa Barbara

Location (1) **8 or Q**
 Account (6 - N)
 Fund (5 - N)
 Object (4 - N)
 Sub (1 - N)
 Reference (up to 6 - AN) **optional**

UC Riverside

Location (1) **5 or N**
 Account (6 - N) **optional**
 Activity (6 - AN)
 Fund (5 - N)
 Function (2 - N)
 Cost Center (4 or 5 - AN) **optional**
 Project Code (5 - AN) **optional**

UC San Francisco

Location (1) **2 or K**
 Business Unit (5 - AN)
 Account (5 - N)
 Fund (4 - N)
 Dept ID (6 - N)
 Project (7 – AN/N)
 Activity Period (2 - N) **optional**
 Function (2 - N)
 Flexfield (up to 6 - AN) **optional**

UC Santa Cruz

Location (1) **7 or P**
 Fund (5 - N)
 Org (6 - N)
 Account (6 – AN/N)
 Program (2 - N) **optional**
 Activity (up to 6 - AN) **optional**
 Doc ref (up to 6 - AN) **optional**

UC San Diego

Entity (5 - N)
Fund (5 - AN)
Financial Unit (7 - N)
Account (6 - N)
Function (3 - N)
Program (3 - AN)
Location (6 - AN)
Project (7 - N)
Activity (6 - AN)
InterEntity (5 - N)
Flex 1 (6 - N)
Flex 2 (6 - N)

Note: Function, Program, Project, Activity, InterEntity, Future1, and Future2 are Mandatory, but may be all zeroes

UC Merced

Entity (4 - N)
Fund (5 - N)
Financial Unit (7 - AN)
Account (6 - N)
Function (2 - N)
Program (3 - AN)
Project (10 - AN)
Physical Location (3 - N)
Sub-Activity (6 - AN)
Inter Entity (4 - N)
Future 1 (6 - AN)

Note: Function, Program, Project, Activity, InterEntity, and Future1 are Mandatory, but may be all zeroes