

UC Davis Researchers: Quick-Start Guide to Stratocore PPMS

Request PPMS user account creation or use an existing PPMS account

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

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
- Select the facility of interest under Facilities available in UC Davis:
- Below the log in boxes, select the first bulleted link for **user account creation request**
- 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.

- 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

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

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 (ICPM), DNA Technologies & In-spection Analysis Cores (DNA Tech), NMR Facility (NMR), 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: test @ucdavis.edu

6. 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

Under Select and account type, select either:

- Chart of Account (COA)
- POET (Project Portfolio Management – PPM)

Begin typing your COA or POET into the search box.

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. Segment fields will generate below where you may now add your account string segments.

***Helpful Notes:**

a. Segment categories will detail the number of characters required and whether these should be numeric (N) or alphanumeric (AN)

b. The Natural Account for COA and Expenditure Type for POET will always be "770003" in PPMS

c. If you Project starts with F9, FP, K30, KL0, KS0, or PPMRC you should be utilizing a POET string

d. The error message "An admin will have to validate the creation of this account" should not stop you from saving the account info

e. See the last pages of this document for details on COA and POET string segments

Select Save

7. User Category

Choose the appropriate role:

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

A screenshot of a web form. The field 'Financial Account number:' is highlighted with a red oval. Below it are fields for 'User Category:' (with a dropdown arrow) and 'Group' (with a dropdown arrow and a 'filter' button). A 'Submit form' button is at the bottom.

Select an account type

A screenshot of a dropdown menu titled 'Choose an account type'. The menu is open, showing 'Chart of Account (COA)' selected and 'POET-AF (Project Portfolio Management - PPM)' as an option below it.

Select or create an account

A screenshot of a search box containing '3110-12100-'. Below the search box is a list of account numbers: '3110-12100-6000153-770003-44-000-AR06491001-000000', '3110-12100-6012002-770003-44-000-AR06606601-200504', and '3110-12100-6012002-775000-44-000-AR06606601-000000'. A red arrow points to the search box.

Select or create an account

A screenshot of the search box with '3110-12100-' entered. To the right of the search box is a link that says 'Create a new account (approval will be required)'. This link is highlighted with a red box.

A screenshot of a form for creating an account. It has several fields with labels and asterisks: 'Entity (4 - N): *' with value '3110', 'Fund (5 - AN): *' with value '20700', 'Department (7 - AN): *' with value '6013101', 'Natural Account (770003): *' with value '770003', 'Purpose (2 - N): *' with value '44', 'Program (3 - AN): *' with value '000', 'Project (10 - AN): *' with value '0000000000', and 'Activity (6 - N): *' with value '000000'.

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

A screenshot of a button bar with 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red oval.

A screenshot of a dropdown menu for 'User Category:'. The menu is open, showing options: 'Investigator', 'Lab Manager', 'Lab Personnel (Staff/Student)', and 'Finance Administrator'.

8. 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 with 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

9. Group Management

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

10. 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

Select a group * Smith

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: *

@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:

UCD (UC Davis) *

Department:

Select a Department here *

Group management:

I request management rights for this group

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

Change Your Default Financial Account

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
Select any core of interest under Facilities available in UC Davis and log in with your UC Davis credentials
- From PROFILE under Default Financial Account Number
Select Change your default account number
- Under Please enter the new account number, click inside the text box, a pop-up window titled "Account number request" will appear
- Under Select an account type, select either:
 - Chart of Account (COA)
 - POET (Project Portfolio Management – PPM)
- Begin typing your COA or POET string into the search box
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, select Create a new account (approval will be required.)

Segment fields will generate below, where you may now add your string segments.

***Helpful Notes:**

- Segment categories will detail the number of characters required and whether these should be numeric (N) or alphanumeric (AN)
- The Natural Account for COA and Expenditure Type for POET will always be "770003"**
- If you Project starts with F9, FP, K30, KL0, KS0, or PPMRC you should be utilizing a POET string
- The error message "An admin will have to validate the creation of this account" should not stop you from saving the account info
- See the last pages of this document for details on COA and POET string segments

- Click Save, click OK to confirm
- Click submit account number modification request

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:

3-COROAD1

[Change your default account number](#)

Select an account type

Choose an account type

- Chart of Account (COA)
- POET-AF (Project Portfolio Management - PPM)

Select or create an account

3110-12100-|

- 3110-12100-6000153-770003-44-000-AR06491001-000000
- 3110-12100-6012002-770003-44-000-AR06606601-200504
- 3110-12100-6012002-775000-44-000-AR06606601-000000

Select or create an account

3110-12100-| [Create a new account \(approval will be required\)](#)

Entity (4-N) : *

3110

Fund (5 - AN) : *

20700

Department (7 - AN) : *

6013101

Natural Account (770003) : *

770003

Purpose (2 - N) : *

44

Program (3 - AN) : *

000

Project (10 -AN) : *

0000000000

Activity (6 - N) : *

000000

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

Cancel **Save**

Please enter the new account number :

3110-12100-6012002-770003-44-000-AR06

[submit account number modification request](#)

Add Additional Financial Accounts

- Go to **PPMS start page** <https://ppms.us/ucdavis/start>
Select any facility of interest under Facilities available in UC Davis and log in with your UC Davis credentials
- From PROFILE under Request authorization TO USE a financial account, select New account AUTHORIZATION request
An Account authorization request window will pop open
- Under Select an account type, select either:
 - Chart of Account (COA)
 - POET (Project Portfolio Management – PPM)
- Begin typing your COA or POET into the search an account box

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, select Create a new account

Segment fields will generate below, where you may now add your string segments.

***Helpful Notes:**

- Segment categories will detail the number of characters required and whether these should be numeric (N) or alphanumeric (AN)
- The Natural Account for COA and the Expenditure Type for POET will always be "770003"**
- If you Project starts with F9, FP, K30, KL0, KS0, or PPMRC you should be utilizing a POET string
- The error message "An admin will have to validate the creation of this account" should not stop you from saving the account info
- See the last pages of this document for details on COA and POET string segments

- Click Save, click Ok to confirm

Financial Account Information

Default Financial Account Number:

3110-12100-6000153-770003-44-000-

[Change your default account number](#)

Request authorization to use a financial account:

[New account authorization request](#)

Select an account type

Choose an account type

Chart of Account (COA)

POET-AF (Project Portfolio Management - PPM)

Select an account type

POET (Project Portfolio Management - PPM)

Type Description:

<https://ucdavis-adminit.github.io/erp-api-docs/api/index.html> Oracle PPM Combined Segments Chartstring Must be (Sponsored Projects): CP00000001-000001-000000-000000-000000-000000 Format Regex: ^[0-9A-Z]{10}-[0-9A-Z]{6}-[0-9A-Z]{6}-[0-9A-Z]{6}-[0-9A-Z]{6}-[0-9A-Z]{6}\$

Select or create an account

K30

[Create a new account](#)

K302021BPA-TASK01-LCHE003-770003

Create a new account

New account number:

KS0DSCHRP1-TASK01-BGEN003-770003

Project (10 - AN) : *

KS0DSCHRP1

Task (6 - AN) : *

TASK01

Organization (7 - AN) : *

BGEN003

Expenditure Type (770003) : *

770003

Cancel

Save

CHART OF ACCOUNTS

The Chart of Accounts (CoA) creates a common language to record all financial transactions in the General Ledger (GL), laying the foundation for the new Aggie Enterprise system, supported by Oracle Cloud Financials. Each segment in the CoA has a distinct definition and purpose. When these segments are combined, the full chart string presents a complete picture of each financial transaction.

TRANSACTIONAL SEGMENTS

CHARACTERS	Segment	Description
4 Numeric	Entity	The Entity segment identifies a major organizational unit within the UC system. The Entity is responsible for all of the financial activities and results of all Financial Departments, Programs and Activities within the Entity's hierarchy. The Entity segment requires entry of a valid value for each transaction.
5 Alpha - Numeric	Fund	The Fund segment identifies funding resources. These resources, or "pots of money," are classified based on designations and restriction types. This classification also supports external reporting of net position. The Fund segment requires entry of a valid value for each transaction.
7 Alpha - Numeric	Financial Department	The Financial Department segment represents an academic or operating unit identified with an ongoing business objective, aligned with the UC Davis organization structure. The Financial Department segment requires entry of a valid value for each transaction.
6 Alpha - Numeric	(Natural) Account	The (Natural) Account segment classifies the nature of the transaction as a specific type of revenue, expense, recharge, transfer, asset, liability or net position. The (Natural) Account segment requires entry of a valid value for each transaction.
2 Numeric	Purpose	The Purpose segment is the functional classification of expenses for financial statements and other functional reporting, or for classifying revenues reflecting the mission of the university. Purpose supports federal and other external reporting requirements. The Purpose segment requires entry of a valid value for all <i>expense</i> transactions. When a Purpose value is not entered, Oracle will generate a default value.
3 Alpha - Numeric	Program	The Program segment records revenue and expense transactions associated with a formal, ongoing system-wide or cross-campus/location academic or administrative activity that demonstrates UC Davis' mission of teaching, research, public service and patient care. The Program segment requires entry of a valid value for transactions associated with UCOP and UC Davis sanctioned programs. When a Program value is not entered, Oracle will generate a default value.
10 Alpha - Numeric	Project	The Project segment tracks financial activity for a 'body of work' that often has a start and an end date that spans across fiscal years. The Project segment is optional**. When a Project value is not entered, Oracle will generate a default value. <i>** Transactions related to a contract, grant, capital, faculty project or other PPM designated project will require processing in the PPM module, which will populate a project segment value.</i>
6 Alpha - Numeric	Activity	The Activity segment will track significant transactions which are recurring and take place at a point in time. The Activity segment is optional. When an Activity value is not entered, Oracle will generate a default value.

PROJECT PORTFOLIO MANAGEMENT

The Project Portfolio Management (PPM) module is a subledger in Oracle. PPM is used to track more complex projects that require additional monitoring. PPM projects are often supported by a contract, with more granular budget and, in the case of sponsored awards, third-party invoicing needs. Types of projects managed in PPM include:

SPONSORED PROJECTS	FACULTY PROJECTS	DEPARTMENT PROJECTS	CAPITAL PROJECTS
<ul style="list-style-type: none"> Externally Funded. Set up and managed by Contracts & Grants Accounting (CGA) Includes: <ul style="list-style-type: none"> Grants Management (from funding to closeout) Billing 	<ul style="list-style-type: none"> Internally Funded. Set up and managed by Dean's offices and departments Includes: <ul style="list-style-type: none"> Faculty Start-Up Academic Enrichment Internal Awards Indirect Cost (F&A) Recovery 	<ul style="list-style-type: none"> Internally Funded. Set up and managed by Dean's offices and departments Units may choose to utilize Department Projects to track the budget and expenditures for a project in greater detail than what can be tracked in the general ledger. 	<ul style="list-style-type: none"> May be externally funded (sponsored) or Internally funded (non-sponsored). Set up and managed by CGA (sponsored) or CAA (non-sponsored) Includes: <ul style="list-style-type: none"> Minor Major Capital Renewal Fabrications

POET(AF) String

PPM is the only subledger module that uses an alternative chart string. Transactions processed for PPM Projects use POET(AF).

REQUIRED

CHARACTERS	REQUIRED
10 Alpha-Numeric	Project: The planned work or activity to be completed over a period of time and intended to achieve a particular goal. The POET(AF) Project value will roll up to the Project segment of the Chart of Accounts. The Project value also includes associated <i>attributes</i> that will map to the Entity and Financial Department segments in the Chart of Accounts.
7 Alpha-Numeric	Expenditure Organization: The organization that is incurring the expense. This may NOT be the same as the organization that owns the project. The POET(AF) Expenditure Organization value will not roll up to the Chart of Accounts.
6 Numeric	Expenditure Type: The natural classification of the expense transaction being recorded. The POET(AF) Expenditure Type value will roll up to the (Natural) Account segment in the Chart of Accounts.
6 Alpha-Numeric	Task: The activities used to further breakdown a PPM project. Every project MUST have at least one Task. The POET(AF) Task value will not roll up to the Chart of Accounts. However, for <u>internal projects</u> , including Faculty projects, the Task value will include embedded <i>attributes</i> that map to the Fund, Purpose, Program and Activity segments in the Chart of Accounts.

Contact
ppms@ucdavis.edu
 for questions or
 assistance.