

UC Davis Researchers: Quick-Start Guide to Stratocore PPMS (BSR 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 Biostatistics 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

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

Submit form

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

Request a Project

1. Go to the **PPMS start page** <https://ppms.us/ucdavis/start>
2. Select the Biostatistics Shared Resource under "Facilities available in UC Davis" and log in with your UC Davis credentials
3. From HOME >> REQUEST Tab, fill out the **Biostatistician Request for Support Form**:
 - Project Title
 - Description
 - Financial Account (this can be changed later)
 - Cancer Center Membership Status
 - Project Type
 - Objectives
 - Timeline
 - Outcome
 - Study Design
 - Sample Size
 - Biostatistician Preference
 - Other Info
 - Budgeting
4. Click "Submit Request"
 Your request will be sent to the Biostatistics Shared Resource for approval. Once approved, you will receive an email notification and be able to view your project on your homepage under the category "My Projects."
 Project tracking and charges from the Biostatistics Shared Resource will be posted to this project.

The screenshot shows the PPMS web application interface. At the top, there is a navigation bar with links: Home, Order, Request (highlighted with a red circle), Documents, Statistics, and Reports. Below this is a yellow bar with the text 'Group/Account Management'. The main content area has a 'Home' heading. A prominent red-bordered box contains the text 'Make a new request: request/start a new project' with a mouse cursor pointing at it. Below this is the 'Biostatistician Request for Support Form'. The form includes several sections with text input fields and radio button options:

- Please enter a title for your project:** (Text input field)
- Please enter a short abstract/description for your project:** (Text input field)
- Please define the account number to use for services and activities linked with this project:** (Text input field)
- Please answer the questions below:**
 - The Comprehensive Cancer Center (CCC) Biostatistics Shared Resource (BSR) provides pre-award biostatistics services without charge to directly support development of grant proposals that, if awarded, will include biostatistics funding for project-specific support. For other, unfunded projects, the BSR provides CCC members up to 10 free hours of support. Additional support will be charged using our current recharge rate. For a grant proposal involving a biostatistician collaborator, please see our Guidelines for Estimating Biostatistician Effort and Resources on Grants at the link below:** <https://ppms.us/researcher/getfile?file=11640-679-C285708C>
 - Are you a Cancer Center Member? ***
 - ☐ Yes
 - ☐ No
 - ☐ Member is a member
 - Check your Cancer Center membership here:** <https://ppms.us/researcher/verifymembership>
 - Project type ***
 - ☐ Grant Proposal
 - ☐ Protocol Development
 - ☐ Data Analysis
 - ☐ Other (Please Specify)
 - Aims/Objectives *** (Text input field)
 - Expected timeline*** (Text input field)
 - Primary endpoints/outcome (i.e., variable being used to address the primary objectives) *** (Text input field)
 - Study design: * (select all that apply)**
 - ☐ Clinical trial
 - ☐ Feasibility/Pilot Study
 - ☐ Cohort
 - ☐ Case study
 - ☐ Preclinical
 - ☐ Prospective observational
 - ☐ Descriptive observational
 - ☐ Cross-sectional
 - ☐ Other (Please Specify)
 - Approximate sample size *** (Text input field)
 - Biostatistician Preference ***
 - ☐ No Preference
 - ☐ Dana Mikhovets
 - ☐ LiHong Qi
 - ☐ Hong Li
 - ☐ Susan Stewart
 - ☐ Shuai Chen
 - ☐ Huajie (Judy) Li
 - ☐ Other (Please Specify)
 - Other information you would like to share?** (Text input field)
 - Do you plan to include biostatistics in your budget? ***
 - ☐ Yes
 - ☐ No
 - ☐ Do not know
 - Additional Details**
 - Should all users in your group/lab have access to this project? (Anyone in your group/lab can charge work to the project) ***
 - ☐ Yes
 - ☐ No
 - Are there specific users outside of your group/lab who should also have access to this project? Please list: *** (Text input field)
 - Does the submitter verify the information is accurate? ***
 - ☐ Yes
 - ☐ No

At the bottom right of the form, there is a red-bordered box containing the text 'Submit request'.

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 account

Type Description:

Select or create 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-z): *

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"

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

Request authorization to **use** a financial account:

New account authorization request

UC DAVIS RESEARCH CORE FACILITIES PROGRAM PPMS for the DNA Technologies & Ex

Home Book Order Documents Schedules Statistics Reports Publications Pr

Account number request

Account type

Type name: UC Davis XPS account

Type Description:

Select or create an account

Search an account...

Create a new account

Account number request

Account type

Type name: UC Davis XPS account

Type Description:

Select or create an account

select another account

Create a new pending account

New account number:

Chart *

Account *

Subaccount:

Project:

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

Cancel Save