

CONTENTS

1) Create an Account	2
2) Log in to PPMS.....	4
3) Book a System	5
4) Place a Service Order	8
5) Request Training.....	11
6) Setup Additional Speedtypes in PPMS.....	12

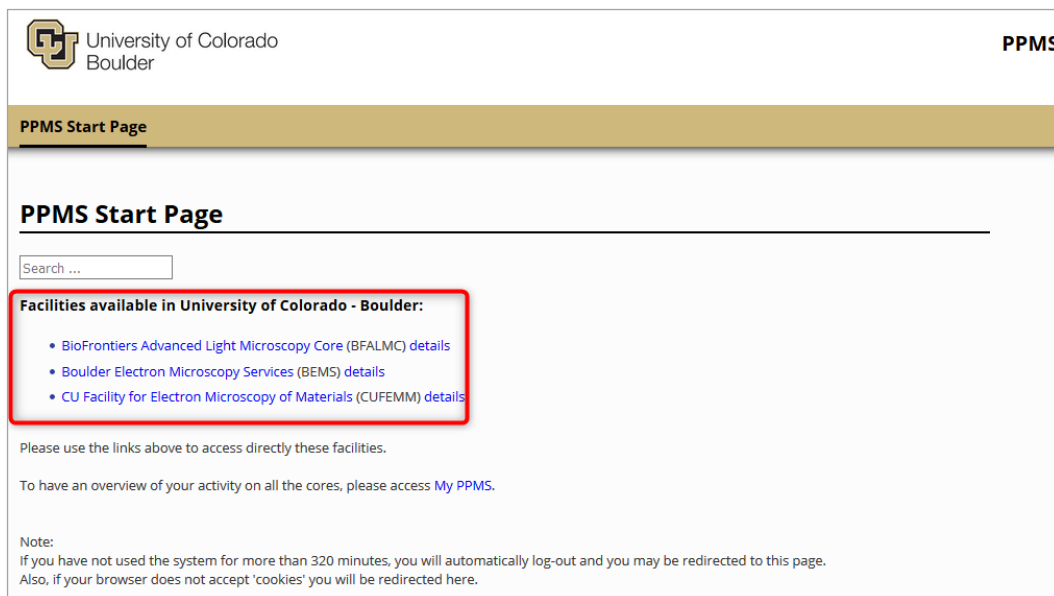
This guide provides step by step instructions for account creation and essential functions performed using PPMS at the University of Colorado Boulder.

1) Create an Account

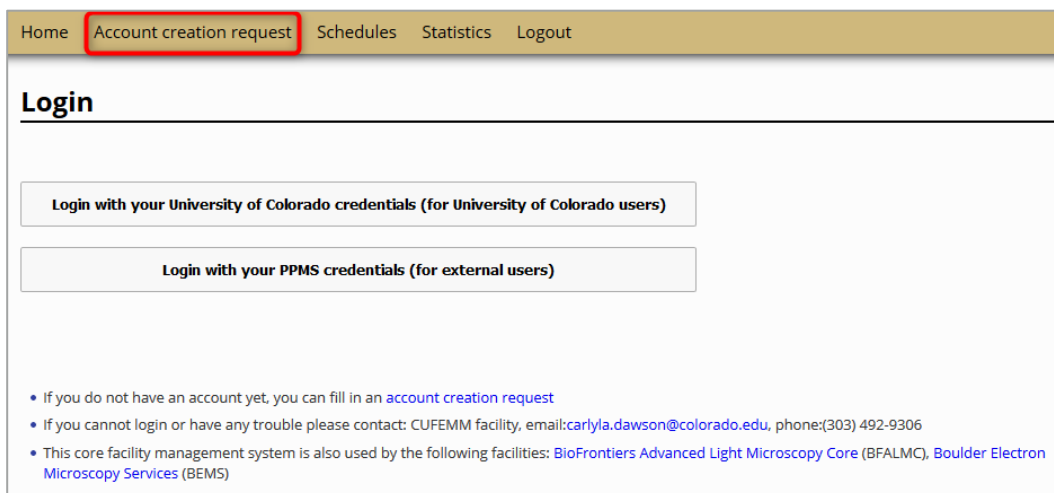
If you are new to PPMS, you will need to create an account in order to login and use the system. Please follow these 5 steps:

Step 1: Navigate to <https://ppms.us/cuboulder>.

Step 2: Click on the name of the appropriate facility from the list.

The screenshot shows the 'PPMS Start Page' for the University of Colorado Boulder. At the top left is the university logo and name, and at the top right is the 'PPMS' label. Below the header is a search bar. A red box highlights a section titled 'Facilities available in University of Colorado - Boulder:' which contains three bullet points: 'BioFrontiers Advanced Light Microscopy Core (BFALMC) details', 'Boulder Electron Microscopy Services (BEMS) details', and 'CU Facility for Electron Microscopy of Materials (CUFEMM) details'. Below this section, there is a note about automatic log-out after 320 minutes and a link to 'My PPMS' for an overview of activity.

Step 3: Click **Account creation request** at the top of the page.

The screenshot shows the 'Login' page of the PPMS system. At the top is a navigation bar with links: 'Home', 'Account creation request' (highlighted with a red box), 'Schedules', 'Statistics', and 'Logout'. Below the navigation bar is the 'Login' section. It contains two login options: 'Login with your University of Colorado credentials (for University of Colorado users)' and 'Login with your PPMS credentials (for external users)'. At the bottom, there are three bullet points: 'If you do not have an account yet, you can fill in an account creation request', 'If you cannot login or have any trouble please contact: CUFEMM facility, email: carlyla.dawson@colorado.edu, phone: (303) 492-9306', and 'This core facility management system is also used by the following facilities: BioFrontiers Advanced Light Microscopy Core (BFALMC), Boulder Electron Microscopy Services (BEMS)'.

Step 4: Read the information on the screen related to PPMS account creation. Select your **affiliation** with regards to the University (i.e. internal or external).

Home **Account creation request** Schedules Statistics Logout

PPMS account creation form

PPMS accounts on this system are used by the following facilities: [BioFrontiers Advanced Light Microscopy Core \(BFALMC\)](#), [Boulder Electron Microscopy Services \(BEMS\)](#), [CU Facility for Electron Microscopy of Materials \(CUFEMM\)](#).

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: CUFEMM facility, email: carlyla.dawson@colorado.edu, phone: (303) 492-9306.
If you do not remember your password, you can [follow these instructions](#).

Please choose one of the following options:

☐ Your institution is University of Colorado - Boulder
☐ Your institution is NOT University of Colorado - Boulder

Step 5: Enter your information in the required fields and click **Submit form**.

Internal CU Affiliate

Home **Account creation request** Schedules Logout

Please enter your details below (*: required fields)

Credentials for BioFrontiers Institute:
simsc@colorado.edu (logout)

First name:

Last name:

Phone:

Account number:
 (optional)

Group
 Select a group
 My group is NOT in the list

Submit form

External User

Home **Account creation request** Schedules Statistics Logout

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@colorado.edu instead of firstname.lastname@colorado.edu)

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

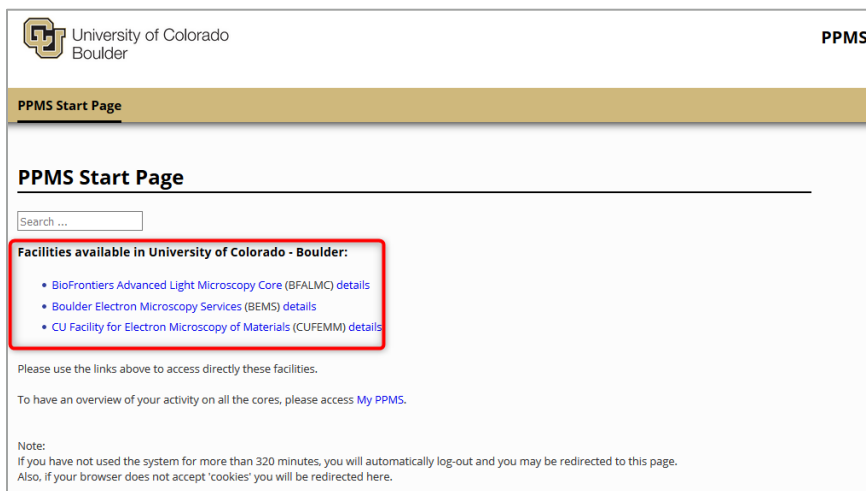
Group
 Select a group
 My group is NOT in the list

Submit form

2) Log in to PPMS

To log in to the system, please follow these 2 steps:

Step 1: Navigate to <https://ppms.us/cuboulder> and click on the name of the appropriate **facility** from the list.



University of Colorado Boulder

PPMS

PPMS Start Page

PPMS Start Page

Search ...

Facilities available in University of Colorado - Boulder:

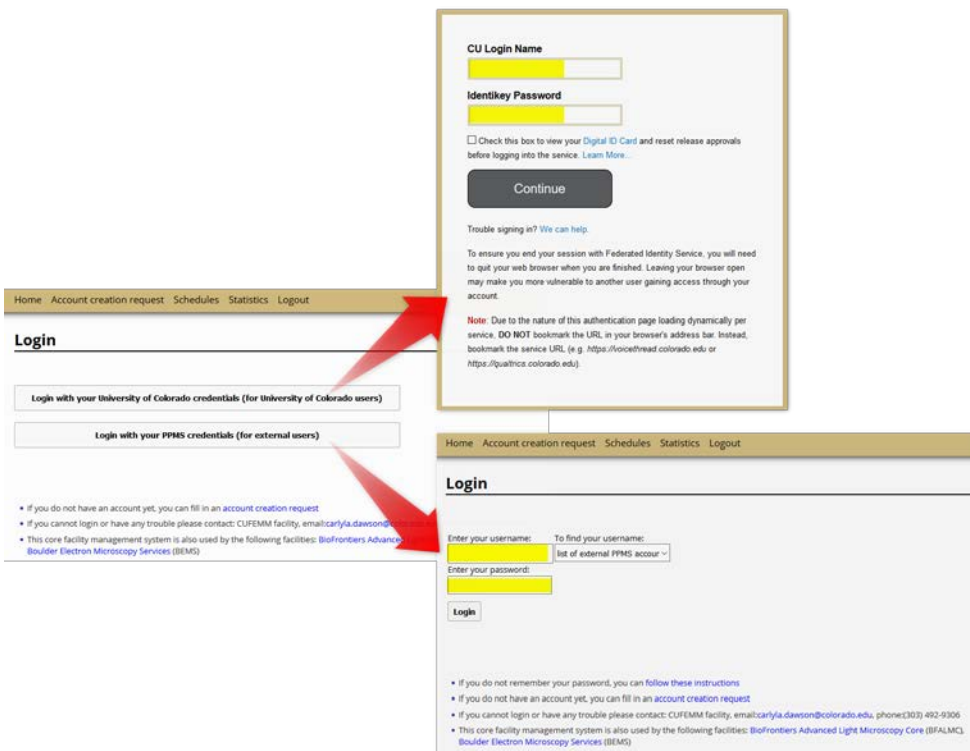
- [BioFrontiers Advanced Light Microscopy Core \(BFALMC\) details](#)
- [Boulder Electron Microscopy Services \(BEMS\) details](#)
- [CU Facility for Electron Microscopy of Materials \(CUFEMM\) details](#)

Please use the links above to access directly these facilities.

To have an overview of your activity on all the cores, please access [My PPMS](#).

Note:
If you have not used the system for more than 320 minutes, you will automatically log-out and you may be redirected to this page.
Also, if your browser does not accept 'cookies' you will be redirected here.

Step 2: Login with your University of Colorado IdentiKey or, if you are an external affiliate, enter your PPMS username and password.



Home Account creation request Schedules Statistics Logout

Login

Login with your University of Colorado credentials (for University of Colorado users)

Login with your PPMS credentials (for external users)

CU Login Name

IdentiKey Password

☐ Check this box to view your Digital ID Card and reset release approvals before logging into the service. [Learn More](#)

Continue

Trouble signing in? [We can help](#)

To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account.

Note: Due to the nature of this authentication page loading dynamically per service, DO NOT bookmark the URL in your browser's address bar. Instead, bookmark the service URL (e.g. <https://voicethread.colorado.edu> or <https://qualtrics.colorado.edu>)

Home Account creation request Schedules Statistics Logout

Login

Enter your username: To find your username: [list of external PPMS account ~](#)

Enter your password:

Login

• If you do not remember your password, you can follow these instructions

• If you do not have an account yet, you can fill in an account creation request

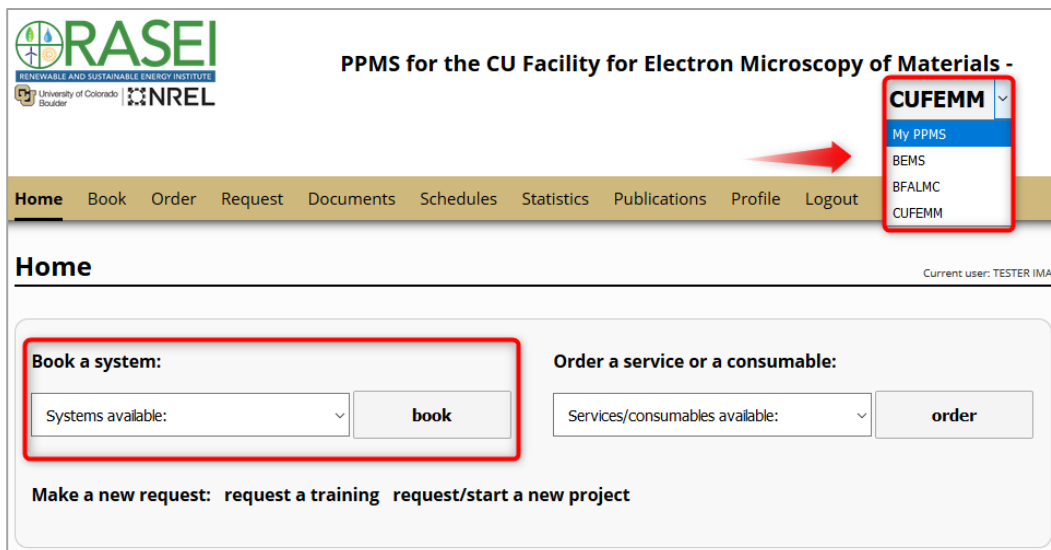
• If you cannot login or have any trouble please contact: CUFEMM facility, email: carlyla.dawson@colorado.edu, phone: (303) 492-9306

• This core facility management system is also used by the following facilities: BioFrontiers Advanced Light Microscopy Core (BFALMC), Boulder Electron Microscopy Services (BEMS)

3) Book a System

To book a system, please follow these 4 steps:

Step 1: From the *Home* page, open the **Systems available** dropdown and select the system.

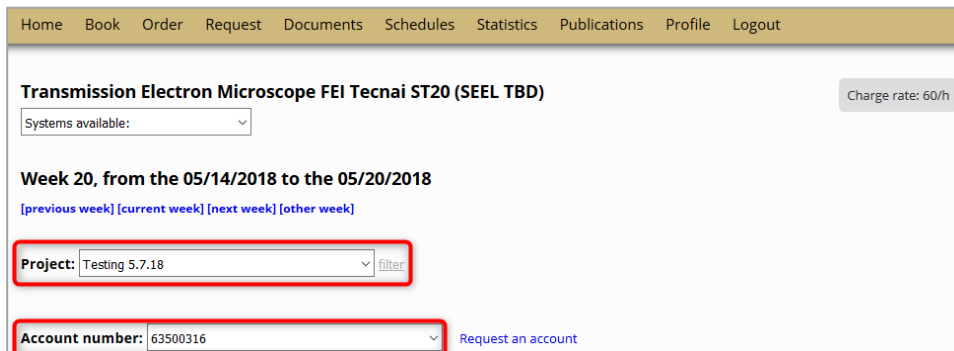


Troubleshooting Tip: If the system you are looking for is not listed, it may be for two reasons:

- (a) You may not be in the correct facility's system. Check the header at the top of the page. To select another facility, use the dropdown menu in the upper right corner of the screen.
- (b) You may not have permission to book. Request a training or contact the Facility Manager directly.

Step 2: You will be directed to the scheduling page. If your facility is utilizing "**Projects**" in PPMS, open the drop-down and make the appropriate selection. Otherwise, open the "**Account number**" drop-down and select the appropriate Speedtype to charge for this booking.

***Note:** Only Internal/CU Affiliates will have account numbers. For external customers, this field will be populated with the text "EXTERNAL – [Group Name]."



Troubleshooting Tip: If the project/account number you are looking for is not there, it may be for two reasons:

- (a) You have not been added as authorized user on this speedtype. Contact Core Manager if this is an error.
- (b) The speedtype has not been setup by the PI yet. PI must submit a *Speedtype/Project Setup* form and indicate authorized users. (Access the form by clicking on the **Request** tab.)

Step 3: Click the checkbox(es) for the desired time slots (or you can click and drag to select time across multiple hours or days). Before clicking **Book the selected sessions** at the bottom of the calendar, select any of the available options shown above the button (e.g. request assistance or alternate equipment configuration).

Home
Book
Order
Request
Documents
Schedules
Statistics
Publications
Profile
Logout

Sample Preparation Leica Automatic Freeze-Substitution (B0020) [More information](#)

Systems available: ⌵

Charge rate: n/a

A project is required to book this system - to create a new project

Week 18, from the 04/30/2018 to the 05/06/2018

[\[previous week\]](#) [\[current week\]](#) [\[next week\]](#) [\[other week\]](#)

After completing the booking, please submit an order form to indicate the number of time you intend to run the system. Go to Home page and select the appropriate form under "Order a Service or a Consumable."

	Monday 04/30/2018	Tuesday 05/01/2018	Wednesday 05/02/2018	Thursday 05/03/2018	Friday 05/04/2018	Saturday 05/05/2018	Sunday 05/06/2018
↑more↑ 09:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12:00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15:00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16:00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
↓more↓							

☐ Request Assistance

Book the selected sessions

Report an incident or a problem on this system.

Notifications

- Receive a notification by email if someone cancels a booking.

The charge rate for the service/system is posted here.

If you will need assistance during the training, check this box.

Note: If the system you reserved is billed *per shot or run*, you will need to submit a *Usage Form*.

Access the *Usage Form* by clicking on the **Order** tab, then follow these 3 steps:

- (1) Select the project (i.e. speedtype) to charge from the dropdown.
- (2) Enter the number of shots/run used in the quantity field (highlight green).
- (3) Click **Save quote**.

Home
Book
Order
Request
Documents
Schedules
Statistics
Publications
Profile
Logout

Order service or consumable

Attach this order to this project:

TESTING (default)
filter

1

A compatible project is required to order some services/consumables
[Request/start a new project](#)

Services and consumables available for order (select and enter the quantity values)
(Some services and consumables will not be visible until you select a compatible project above)

Service Requests (to be completed by BEMS)				Min	Max	Incr.	Unit price	Quantity	Price
#030013	Cryo-Sample Preparation Service	show description	add a comment	1	1	1	0.00	0	0.00
#030014	TEM Imaging Services	show description	add a comment	1	1	1	0.00	0	0.00
Usage Forms (complete for equipment charged per shot/run)				Min	Max	Incr.	Unit price	Quantity	Price
#030006	Leica Automatic Freeze-Substitution System (AFS)	show description	add a comment	1	-	1	1+ : 105.00	3	315.00
#030005	Leica EM BAF060 Freeze-Etch System	show description	add a comment	1	-	1	1+ : 52.00	0	0.00
#030004	Wohlwend Compact O2 High Pressure Freezer	show description	add a comment	1	-	1	1+ : 12.00	0	0.00
TOTAL								Quantity	Price
								3	315.00

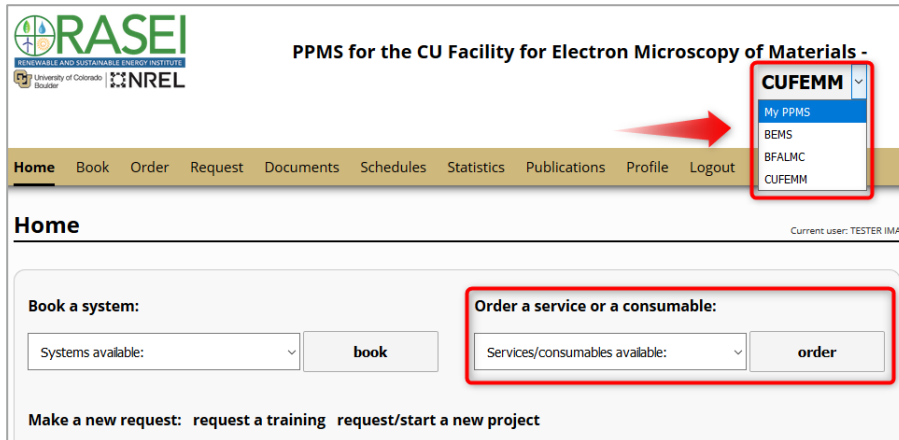
If you have a PO number for this order, please enter it here:

Order
Save quote
3

4) Place a Service Order

To place an order for a service to be completed by the core facility staff, please follow these 4 steps:

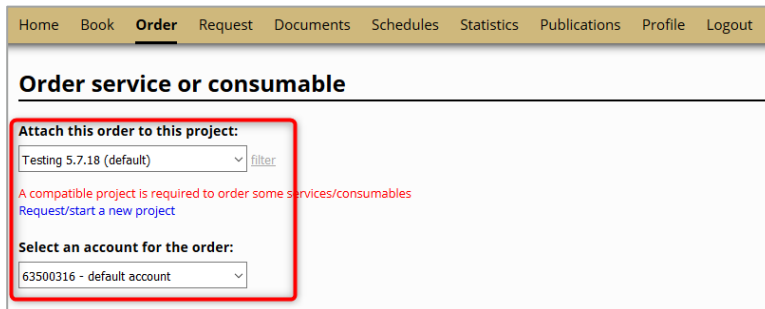
Step 1: From the *Home* page, open the **Services/consumables available** dropdown and select a service.



The screenshot shows the PPMS Home page. At the top, there's a navigation bar with links: Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, Logout. Below this, the 'Home' section is visible. On the right, a dropdown menu for 'Services/consumables available' is open, showing options: My PPMS, BEMS, BFALMC, and CUFEMM. A red arrow points to the CUFEMM option. Below the navigation bar, there are two main sections: 'Book a system:' and 'Order a service or a consumable:'. The 'Order a service or a consumable:' section is highlighted with a red box. It contains a dropdown menu for 'Services/consumables available' and an 'order' button. Below these sections, there's a link to 'Make a new request: request a training request/start a new project'.

Step 2: You will be directed to the order form page. If your facility is utilizing “**Projects**” in PPMS, open the drop-down and make the appropriate selection. Otherwise, open the “**Account number**” drop-down and select the appropriate Speedtype to charge for this booking.

***Note:** Only Internal/CU Affiliates will have account numbers. For external customers, this field will be populated with the text “EXTERNAL – [Group Name].”



The screenshot shows the 'Order service or consumable' page. At the top, there's a navigation bar with links: Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, Logout. Below this, the 'Order service or consumable' section is visible. It contains two main sections: 'Attach this order to this project:' and 'Select an account for the order:'. The 'Attach this order to this project:' section has a dropdown menu set to 'Testing 5.7.18 (default)' and a 'filter' button. Below this, there's a red text message: 'A compatible project is required to order some services/consumables' and a link to 'Request/start a new project'. The 'Select an account for the order:' section has a dropdown menu set to '63500316 - default account'. A red box highlights these two sections.

Step 3: Enter “1” in the **Quantity** field next to the service type and click **Save quote**.

Services and consumables available for order (select and enter the quantity values)
(Some services and consumables will not be visible until you select a compatible project above)

Service Requests (to be completed by BEMS)		Min	Max	Incr.	Unit price	Quantity	Price
#030013	Cryo-Sample Preparation Service add a comment	1	1	1	0.00	1	0.00
Description: Please enter 1 for quantity and click 'Save Quote' - you will be redirected to the order form.							
#030014	TEM Imaging Services show description add a comment	1	1	1	0.00	0	0.00
Usage Forms (complete for equipment charged per shot/run)		Min	Max	Incr.	Unit price	Quantity	Price
#030006	Leica Automatic Freeze-Substitution System (AFS) show description add a comment	1	-	1	1+ : 105.00	0	0.00
#030005	Leica EM BAF060 Freeze-Etch System show description add a comment	1	-	1	1+ : 52.00	0	0.00
#030004	Wohlwend Compact 02 High Pressure Freezer show description add a comment	1	-	1	1+ : 12.00	0	0.00
TOTAL						Quantity	Price
						1	0.00

If you have a PO number for this order, please enter it here:

Step 4: An order form will display. Answer the questions and click **Submit form**.

Cryo-Sample Preparation Order Form

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

1) Select sample preparation method:

☐ Negative Stain

☐ Cryo-TEM

2) Describe the composition of the solution/buffer:

3) Enter quantity of samples (including controls):

Note: Once the facility manager reviews your request, you will receive notifications from PPMS.

- The facility manager may request additional information, which you may provide by logging back into PPMS and responding via the order form or simply contacting the Core Manager.

Step 5: *If additional information is not necessary, you will receive an itemized quote detailing the anticipated labor and resources required to fulfill your request.*

Click the link from your email to view the quote. If you accept the quote, click **Make the order**.


Quote ref. #19

Quote ref. #19
 Quote for TESTER IMA, email: carina.duhadway@colorado.edu, phone: 3033499791 (EXTERNAL TEST)
 Quote made the 05/04/2018 at 16:25 by TESTER IMA
 Account number to use: 99999
 Affiliation: ExNP
 This quote is attached to [project "TESTING"](#). [Change project](#)
 Assigned to: nobody

Admin Use Only		Unit price	Quantity	Price	
#030007	Technical Assistance show user's comments	104.00	2	208.00	added
#030010	TEM (300kV) show user's comments	175.00	2	350.00	added

Service Requests (to be completed by BEMS)		Unit price	Quantity	Price	
#030013	Cryo-Sample Preparation Service (service form) show description show user's comments	0.00	1	0.00	

TOTAL			Quantity	Price	
			5	558.00	



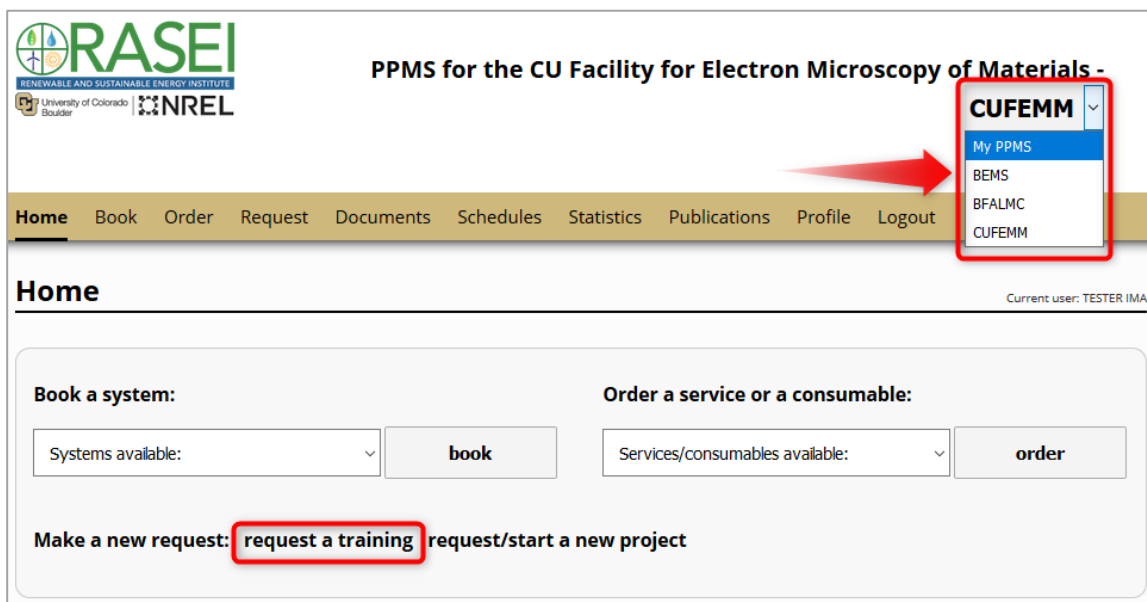
If you have a PO number for this order, please enter it here:

Review labor and resource estimations here

5) Request Training

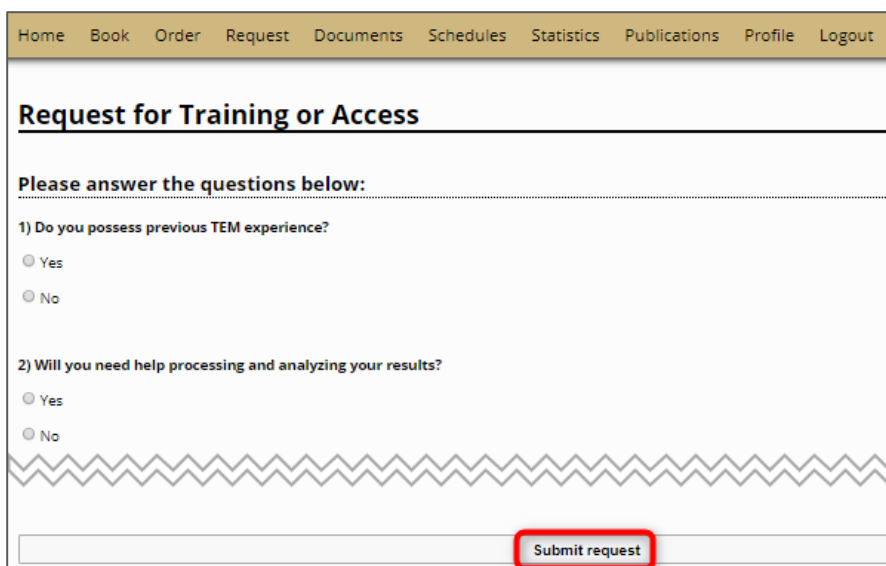
If you need to request training, please follow these 2 steps:

Step 1: From the *Home* page, click **request a training**. Verify you are submitting this request to the correct facility.



The screenshot shows the PPMS Home page. At the top, there are logos for RASEI, University of Colorado Boulder, and NREL. The title is "PPMS for the CU Facility for Electron Microscopy of Materials -". Below this is a navigation bar with links: Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, Logout. A dropdown menu is open for "CUFEMM", showing options: My PPMS, BEMS, BFALMC, and CUFEMM. A red arrow points to the "CUFEMM" option. Below the navigation bar, the "Home" section is displayed. It includes a "Book a system:" section with a "Systems available:" dropdown and a "book" button. It also includes an "Order a service or a consumable:" section with a "Services/consumables available:" dropdown and an "order" button. At the bottom, there is a "Make a new request:" section with a red box around the "request a training" link and the text "request/start a new project". The current user is listed as "TESTER IMA".

Step 2: Complete the form and click **Submit request**.



The screenshot shows the "Request for Training or Access" form. At the top, there is a navigation bar with links: Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, Logout. The title is "Request for Training or Access". Below the title, it says "Please answer the questions below:". There are two questions: "1) Do you possess previous TEM experience?" with radio buttons for "Yes" and "No", and "2) Will you need help processing and analyzing your results?" with radio buttons for "Yes" and "No". At the bottom, there is a red box around the "Submit request" button.

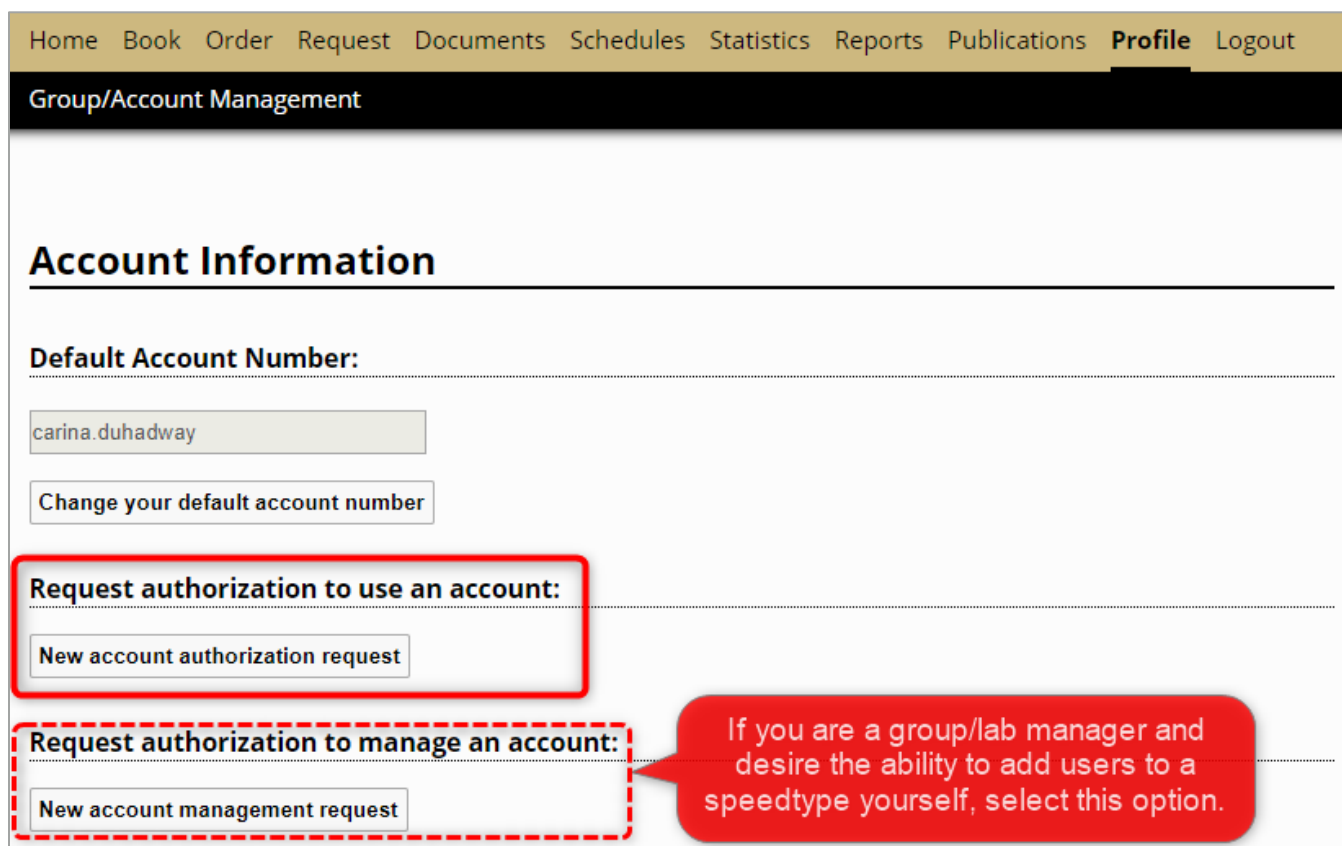
You will be contacted by a facility administrator to regarding your training request.

6) Setup Additional Speedtypes in PPMS

Step 1. Click **Profile** from top navigation bar.

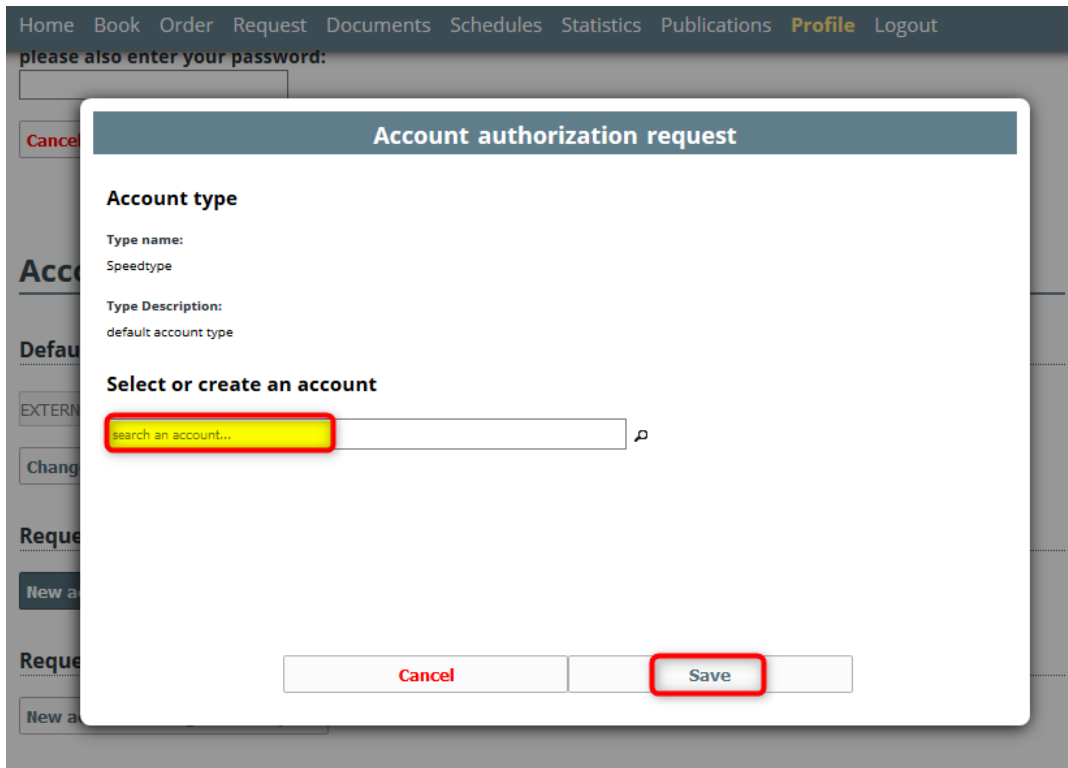
Step 2. Scroll down to **Account Information** and click 'New account authorization request.'

- If you are a group or lab manager, you can request the authority to manage speedtype requests (instead of facility admin). If this is desired, click 'New account management request.'



The screenshot shows the 'Profile' page in the PPMS system. The top navigation bar includes links for Home, Book, Order, Request, Documents, Schedules, Statistics, Reports, Publications, Profile, and Logout. Below this is a 'Group/Account Management' header. The main section is titled 'Account Information'. Under this, there is a 'Default Account Number' field containing 'carina.duhadway' and a 'Change your default account number' button. Below that, there are two sections for requesting authorization. The first section, 'Request authorization to use an account:', is highlighted with a solid red border and contains a 'New account authorization request' button. The second section, 'Request authorization to manage an account:', is highlighted with a dashed red border and contains a 'New account management request' button. A red callout bubble points to the second section with the text: 'If you are a group/lab manager and desire the ability to add users to a speedtype yourself, select this option.'

Step 3. Enter SpeedType. (PPMS validates SpeedTypes using list provided by PeopleSoft nightly. If PPMS indicates the ST is invalid, please recheck the number and consult with your financial manager.)



The screenshot shows a web application interface with a dark header bar containing navigation links: Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, and Logout. Below the header, a text prompt reads "please also enter your password:" followed by a password input field. A "Cancel" button is visible to the left of the password field. Overlaid on this is a modal dialog box titled "Account authorization request". Inside the dialog, under the heading "Account type", there are two fields: "Type name:" with the value "Speedtype" and "Type Description:" with the value "default account type". Below these is a section titled "Select or create an account" which contains a search input field with the placeholder text "search an account...". At the bottom of the dialog are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red rectangular box. The search input field is also highlighted with a red rectangular box.

Step 4. The request has been submitted. Once the request is approved, the user will receive an email notification.