University of Colorado **Boulder**

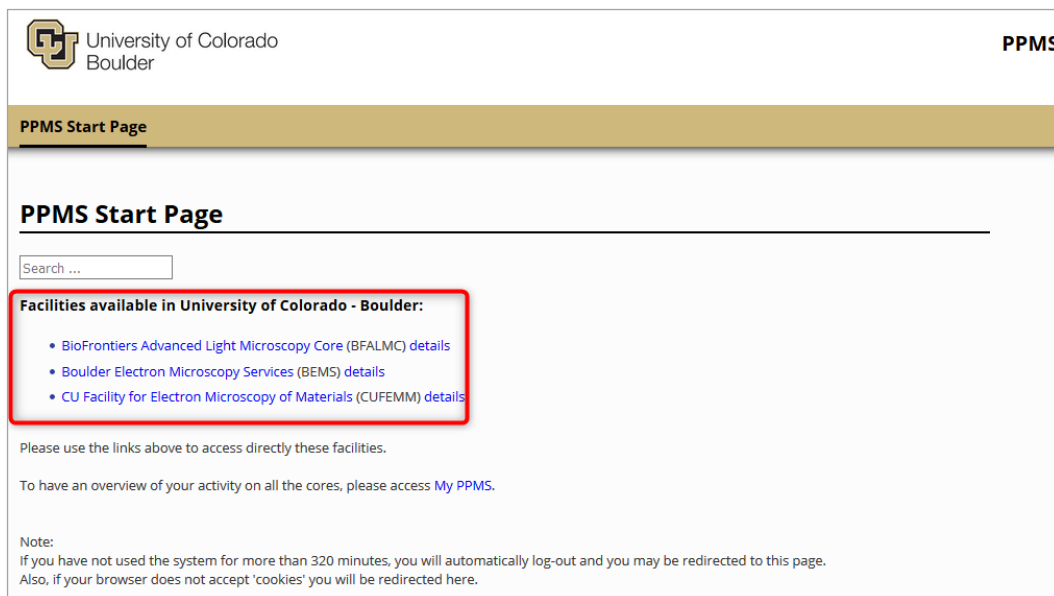## PPMS® | *Resource Management System by Stratocore*

CONTENTS

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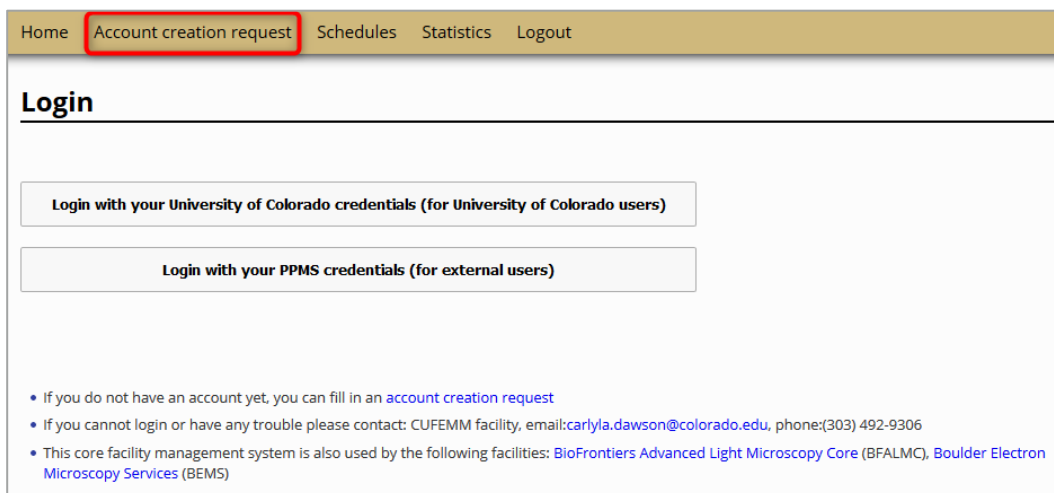
1) Create an Account

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.

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

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).

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

Internal CU Affiliate   *External User*
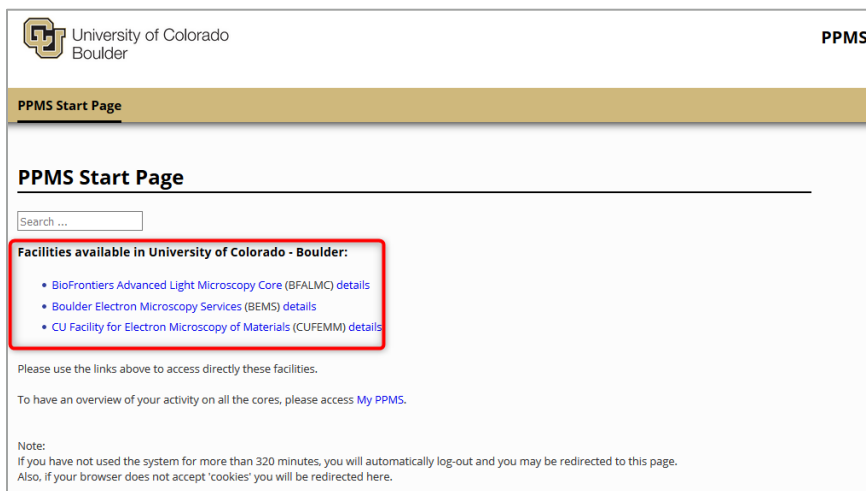
2) Log in to PPMS

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.

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

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.

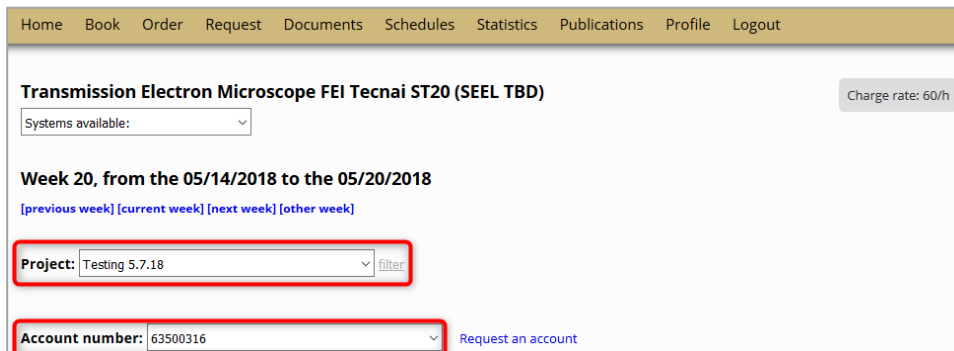(b) You may not have permission to book. Request a training or contact the Facility Manager directly.

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).

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**.

4) Place a Service Order

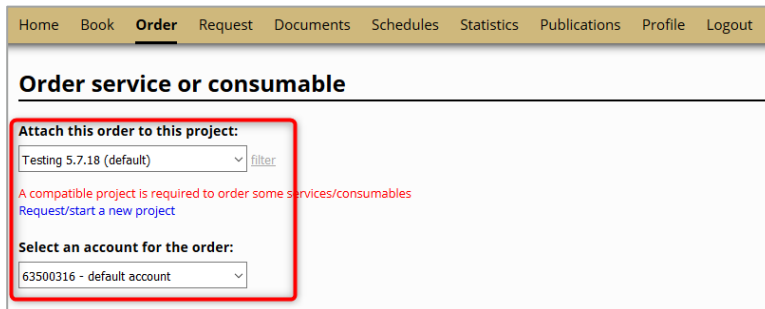To place an order for a service to be completed by the core facility staff, please follow these 4 steps:

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

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 <u>Speedtype</u> 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]."

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

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

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**.
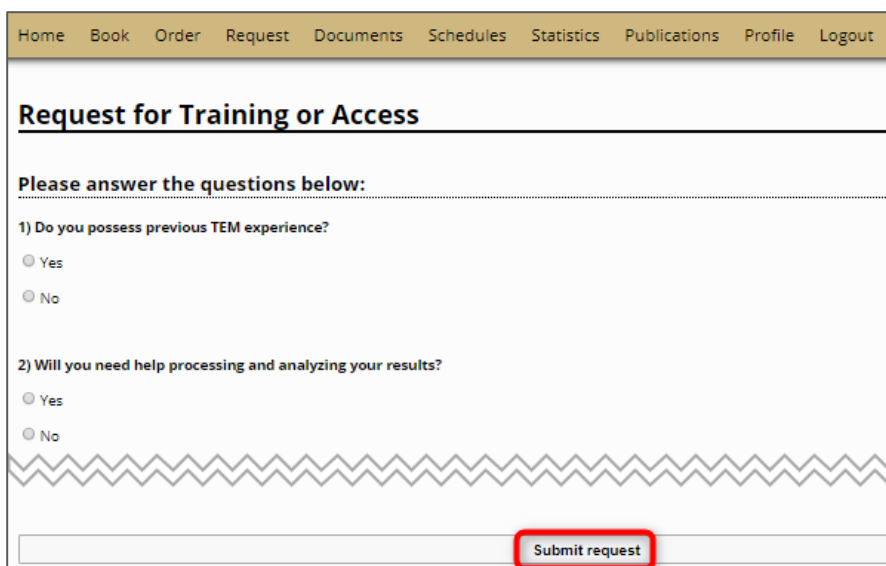
5) Request Training

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.

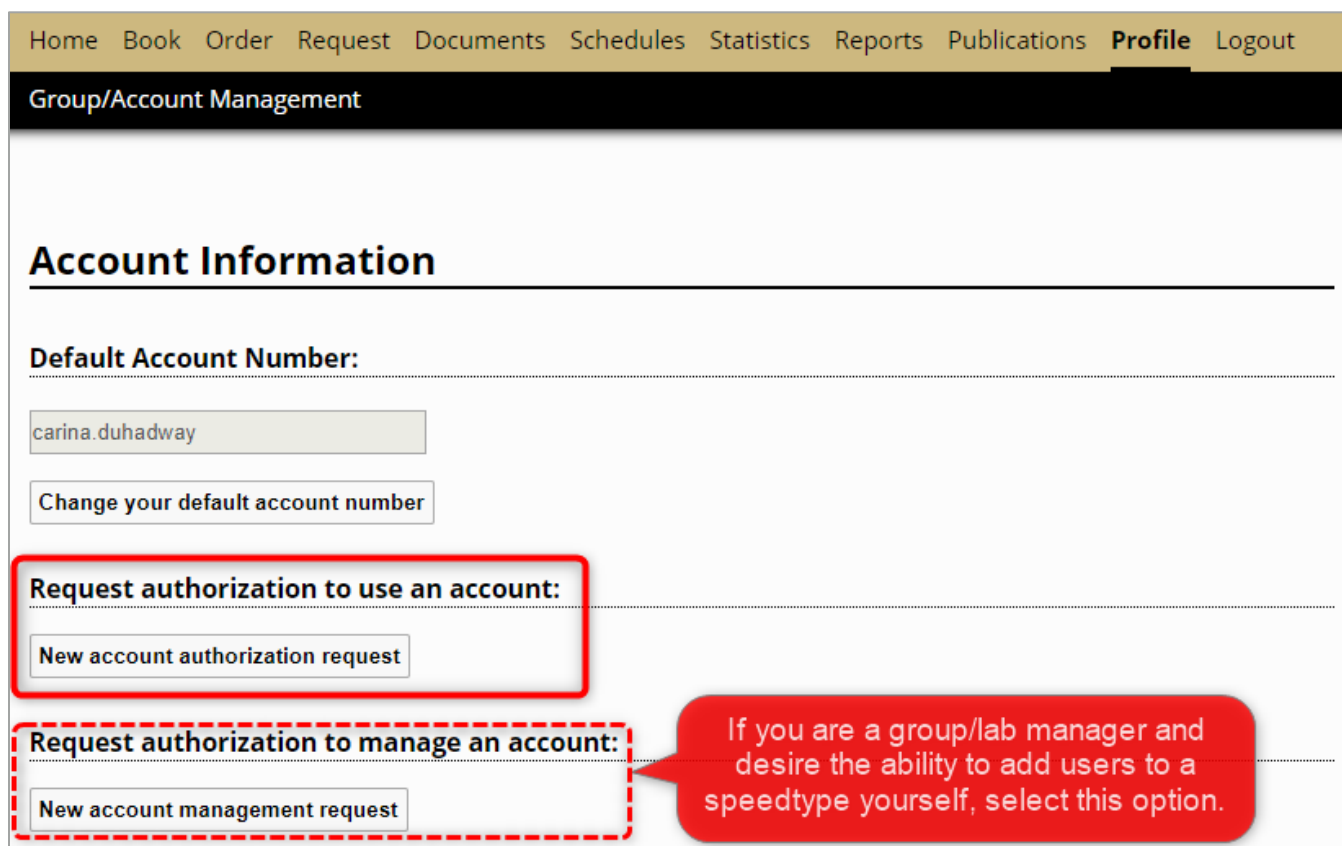**Step 2:** Complete the form and click **Submit request**.

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

6) Setup Additional Speedtypes in PPMS

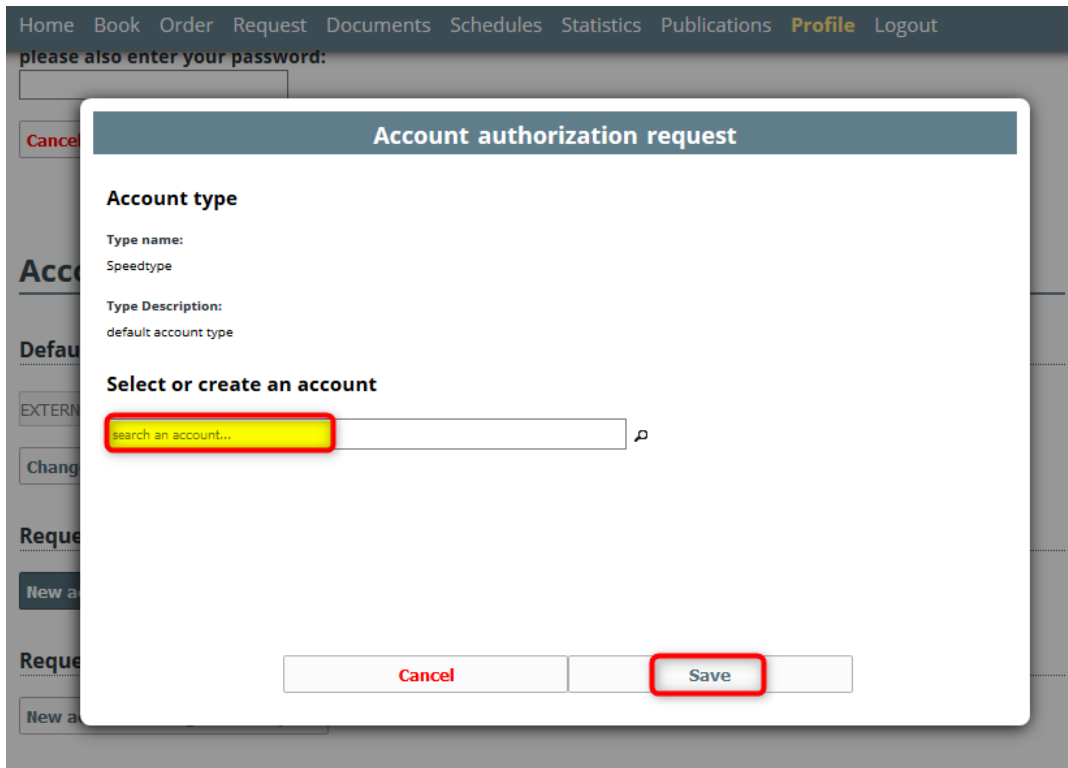**Step 1.** Click **Profile** from top navigation bar.

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.**'

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.)*

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