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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 already have an account in PPMS, you do not need to create an additional one. 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.

 University of Colorado
Boulder

PPMS Start Page

PPMS Start Page

Facilities available in CU Boulder:

- [Arikaree Environmental Laboratory \(Arikaree\)](#)
- [Boulder Electron Microscopy Services \(BEMS\) details](#)
- [COSINC-Characterization Facility \(COSINCCHR\)](#)
- [COSINC-Fabrication Facility \(COSINCFAF\)](#)
- [CU Facility for Electron Microscopy of Materials \(CUFEMM\) details](#)
- [Materials Instrumentation & Multi-Modal Imaging Core Facility \(MIMIC\) details](#)

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

Home **Account creation request** Schedules Statistics Logout

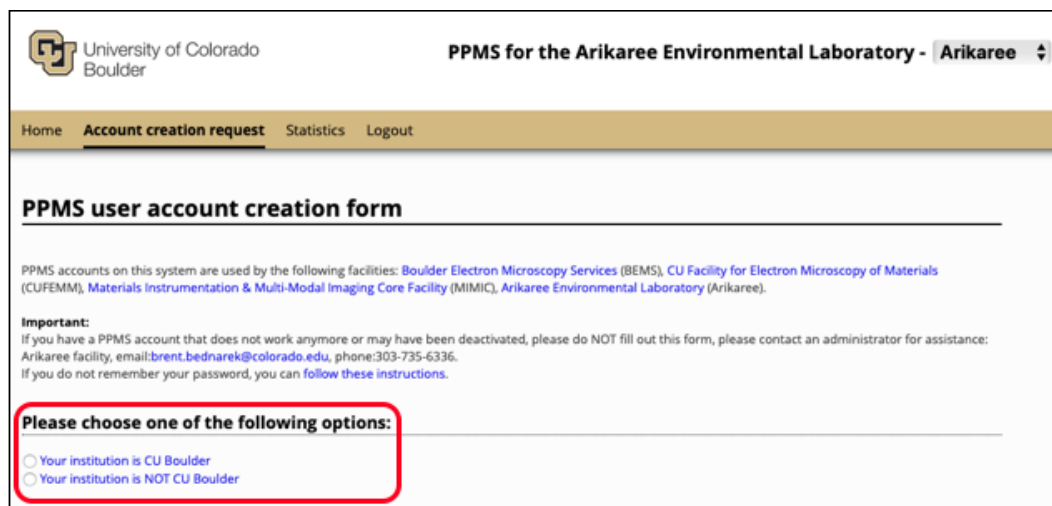
Login

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

Login with your PPMS credentials (for external users)

- 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 \(BEMS\)](#)

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).



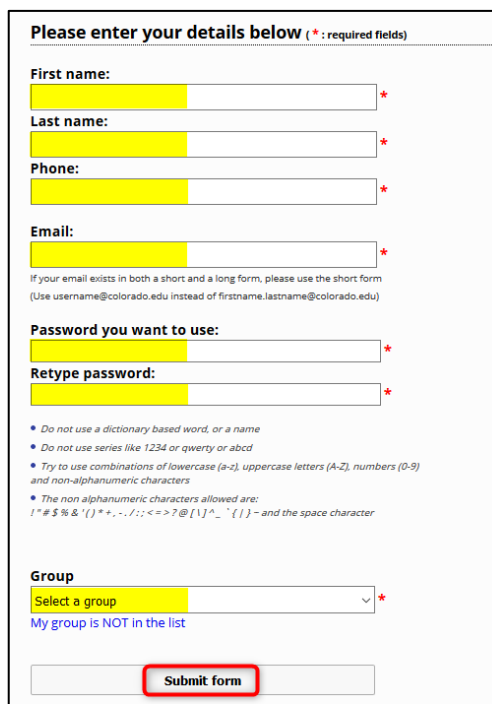
Note: If you choose CU Boulder – you'll need to log-in with your IdentiKey Password. Accept the service requirements. Click **Accept**.

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

Institution is CU Boulder



External User



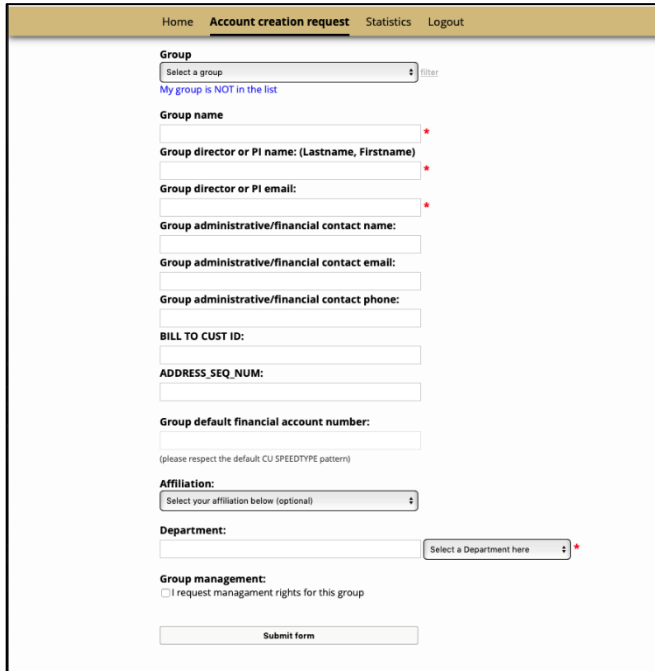
If your *Group* is not listed, select the link **My group is NOT in the list** and complete the following.

Mandatory fields:

- Group Name
- Group PI or director's full name (Last Name, First Name)
- PI or director email
- Affiliation (if you know it)
- Department
- Institution (external user only)
- Invoicing Address (external user only)

Institution is CU Boulder

External User



Home **Account creation request** Statistics Logout

Group
 Select a group filter
[My group is NOT in the list](#)

Group name *

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:

BILL TO CUST ID:

ADDRESS_SEQ_NUM:

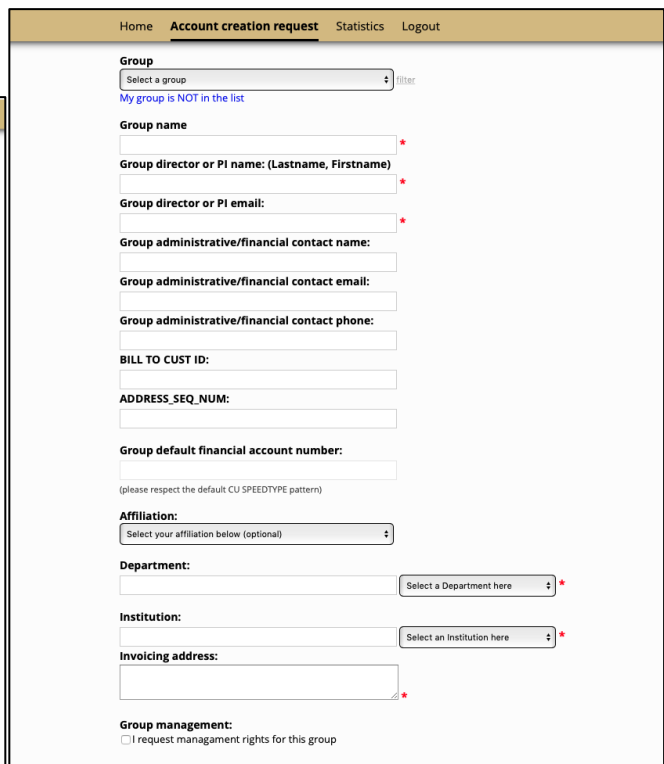
Group default financial account number:

(please respect the default CU SPEEDTYPE pattern)

Affiliation:
 Select your affiliation below (optional)

Department:
 Select a Department here *

Group management:
☐ I request managment rights for this group



Home **Account creation request** Statistics Logout

Group
 Select a group filter
[My group is NOT in the list](#)

Group name *

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:

BILL TO CUST ID:

ADDRESS_SEQ_NUM:

Group default financial account number:

(please respect the default CU SPEEDTYPE pattern)

Affiliation:
 Select your affiliation below (optional)

Department:
 Select a Department here *

Institution:
 Select an Institution here *

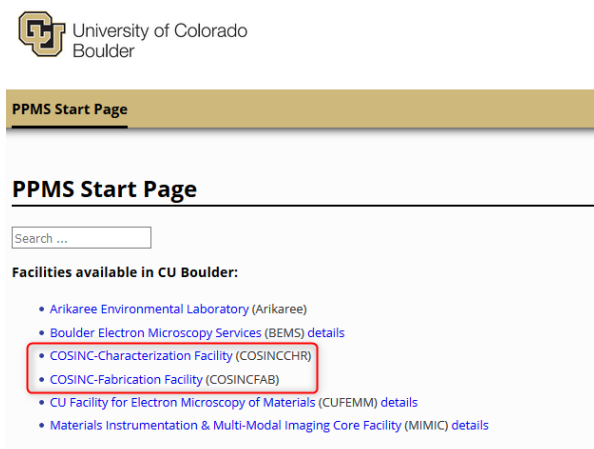
Invoicing address: *

Group management:
☐ I request managment rights for this group

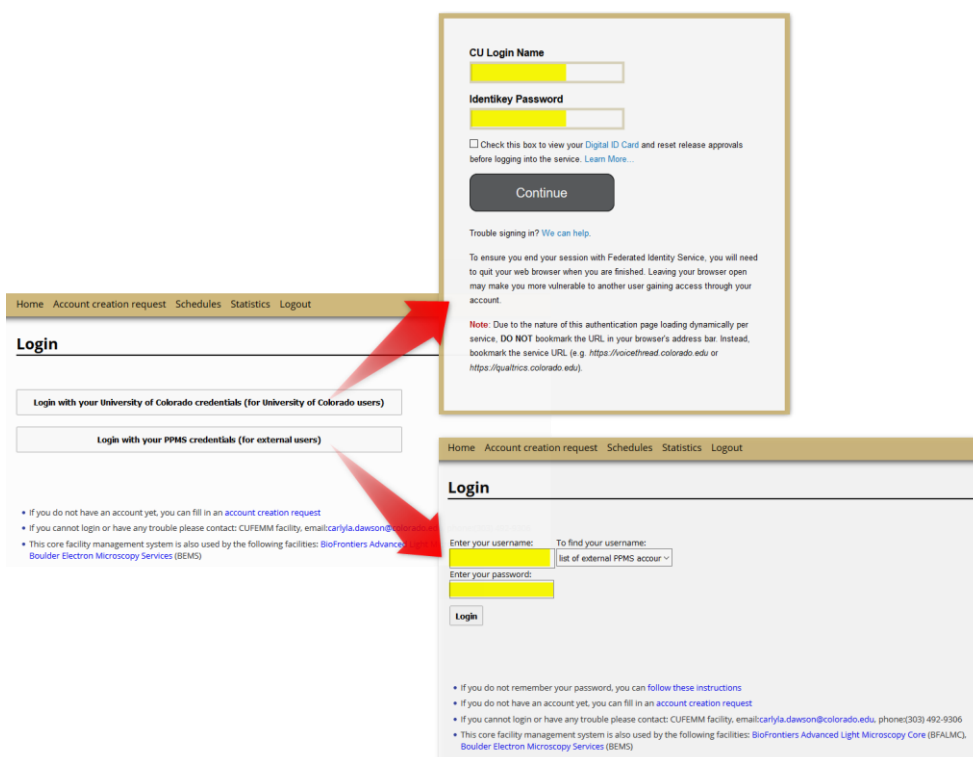
2) Log in to PPMS

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.



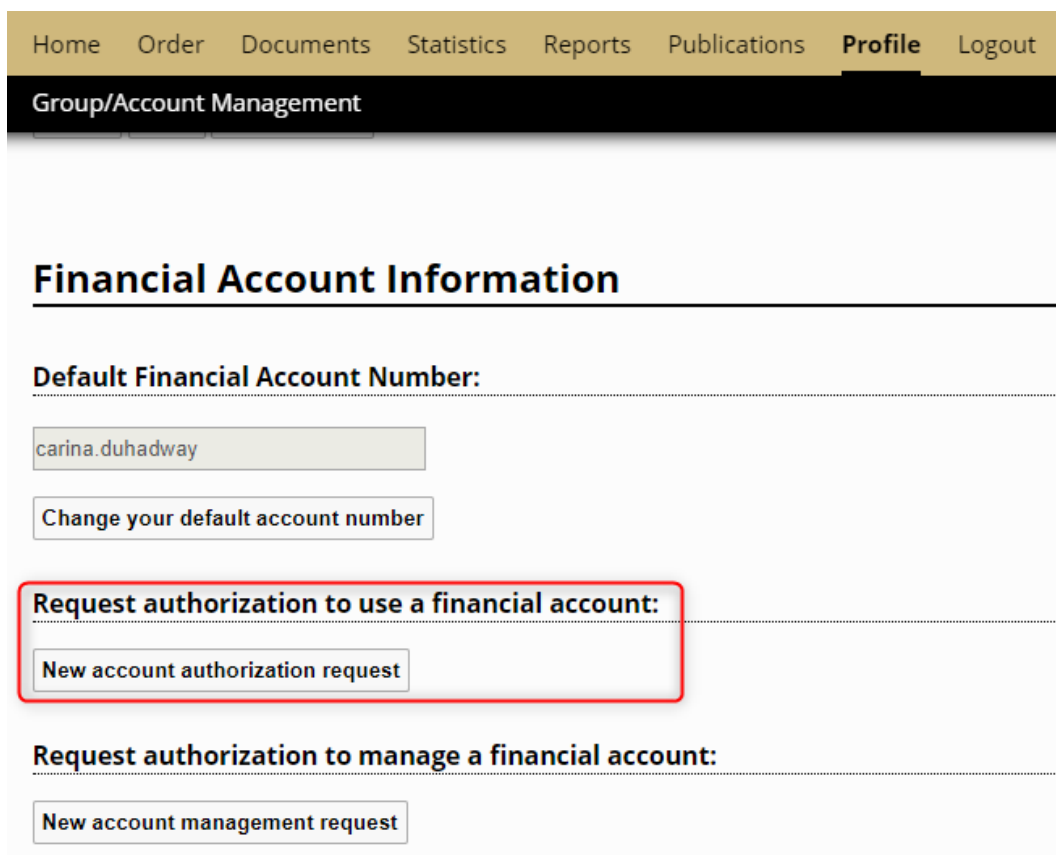
Step 2: Login with your University of Colorado IdentiKey or, if you are an external affiliate, enter your PPMS username and password.



3) Setup Additional SpeedTypes in PPMS

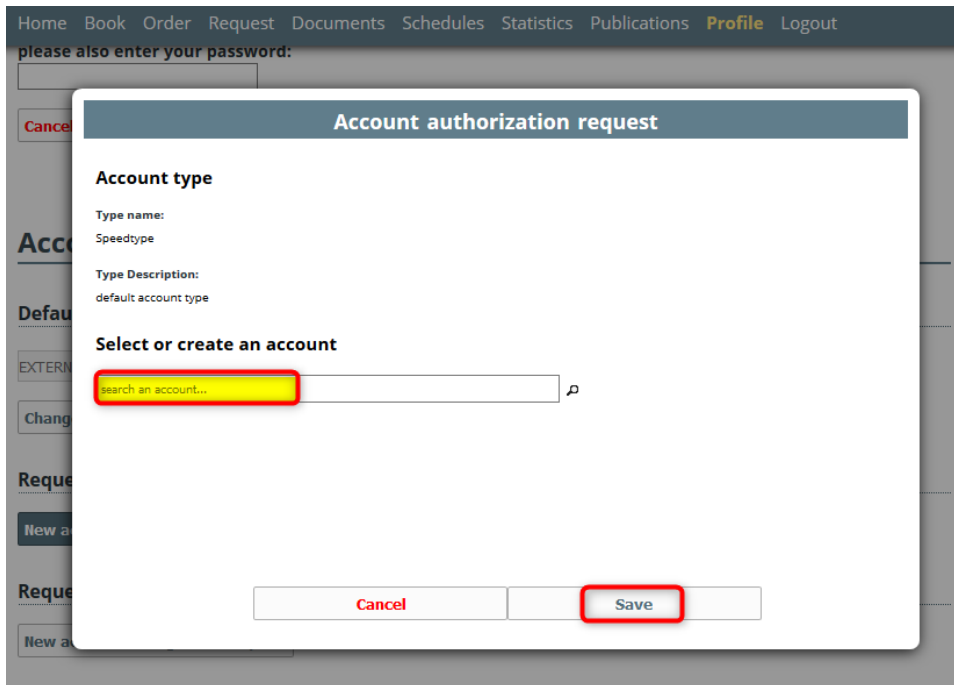
Step 1. Click **Profile** from top navigation bar.

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

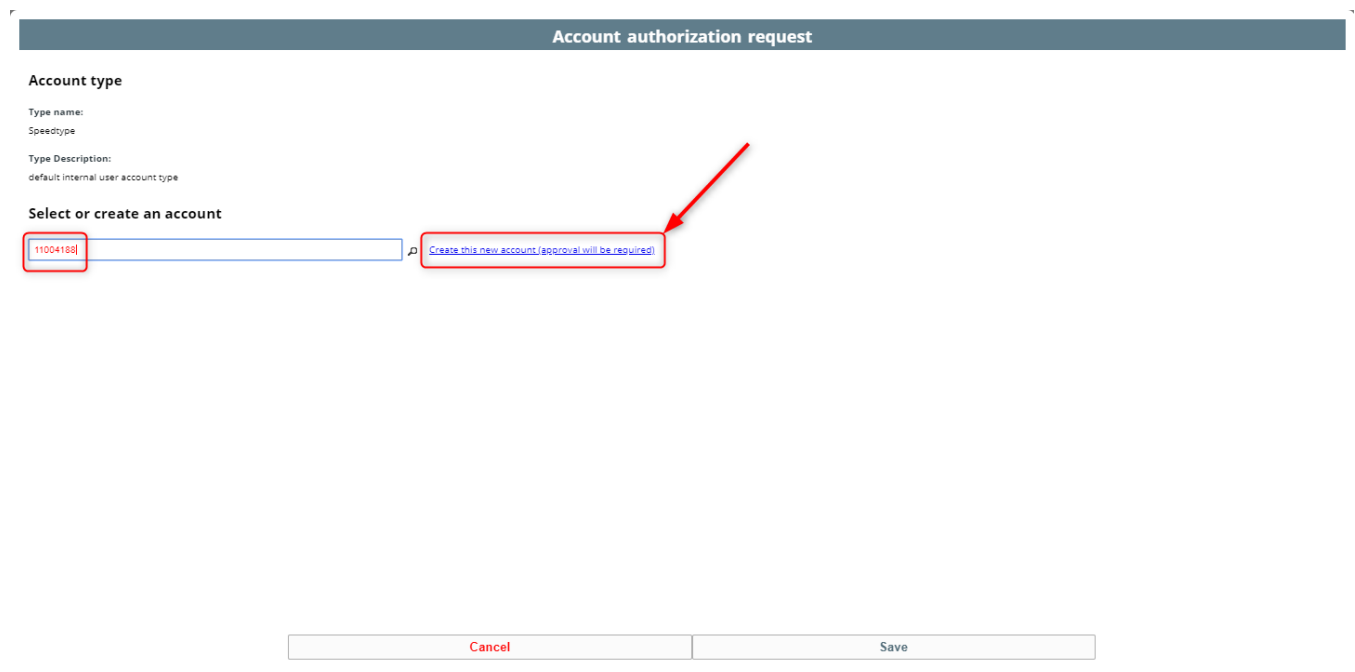


The screenshot shows the PPMS web interface. At the top is a navigation bar with links: Home, Order, Documents, Statistics, Reports, Publications, **Profile**, and Logout. Below this is a dark header bar labeled "Group/Account Management". The main content area is titled "Financial Account Information". Under this title, there is a section "Default Financial Account Number:" followed by a text input field containing "carina.duhadway" and a button labeled "Change your default account number". Below this is a section "Request authorization to use a financial account:" which is highlighted with a red rectangle. This section contains a button labeled "New account authorization request". At the bottom is a section "Request authorization to manage a financial account:" with a button labeled "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. If your SpeedType has not yet been used within the PPMS system, you will see a link to the right of your SpeedType indicating that you can create a new account for this SpeedType as indicated below. To proceed, click the link.





Step 5. You will receive a notification indicating that Admin approval will be needed to validate the account. Click Save.

Account authorization request

Account type

Type name:
Speedtype

Type Description:
default internal user account type

Select or create an account

11004188

Create a new pending account

New account number:
11004188

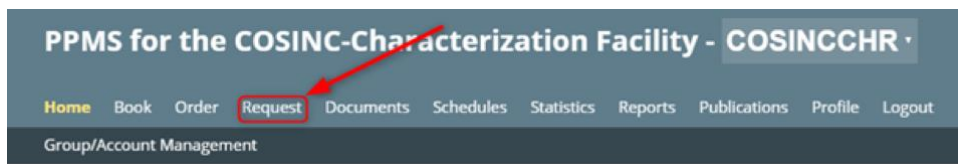
An admin will have to validate the creation of this account.

Cancel

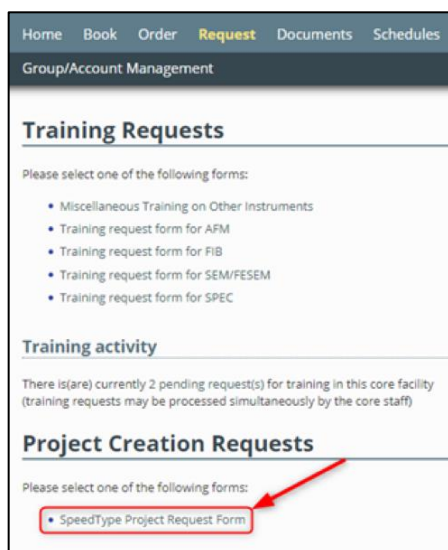
Save

**** If you use multiple SpeedTypes that have different affiliations, you must create a Project for each SpeedType/affiliation!!!

- 1) On the *Home* page, select **Request** in the banner.



- 2) Under *Project Creation Request*, select **SpeedType Project Request Form**.



- 3) Fill out the form completely.

SpeedType Project Request Form

Please enter a title for your project:

Please enter a short abstract/description for your project:

Please define the account number to use for services and activities linked with this project:

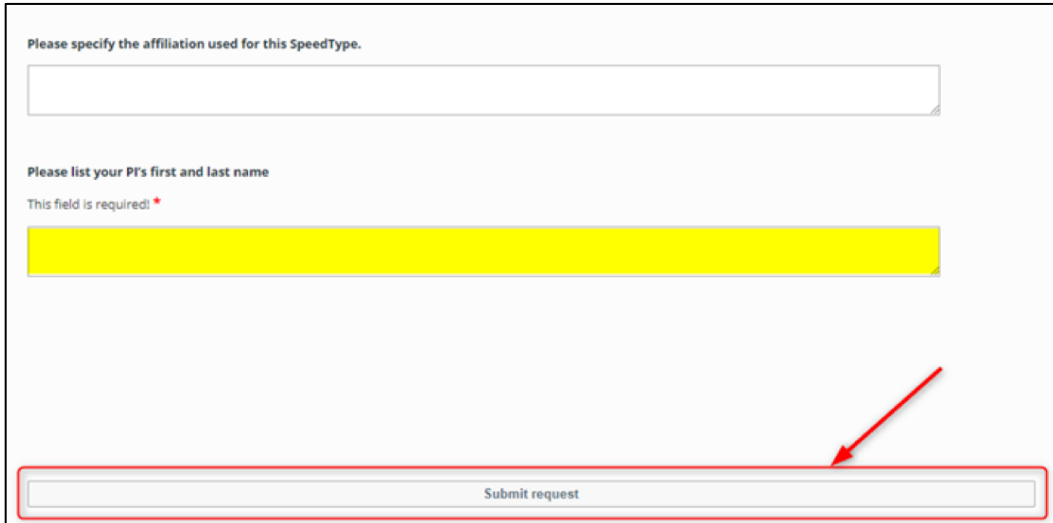
Please answer the questions below:

SpeedType Project Request Form

Who will be authorized to use this SpeedType. Please list first and last names.

This field is required! *

- 4) Click **Submit request** at the bottom of the page.



Please specify the affiliation used for this SpeedType.

Please list your PI's first and last name

This field is required! *

Submit request

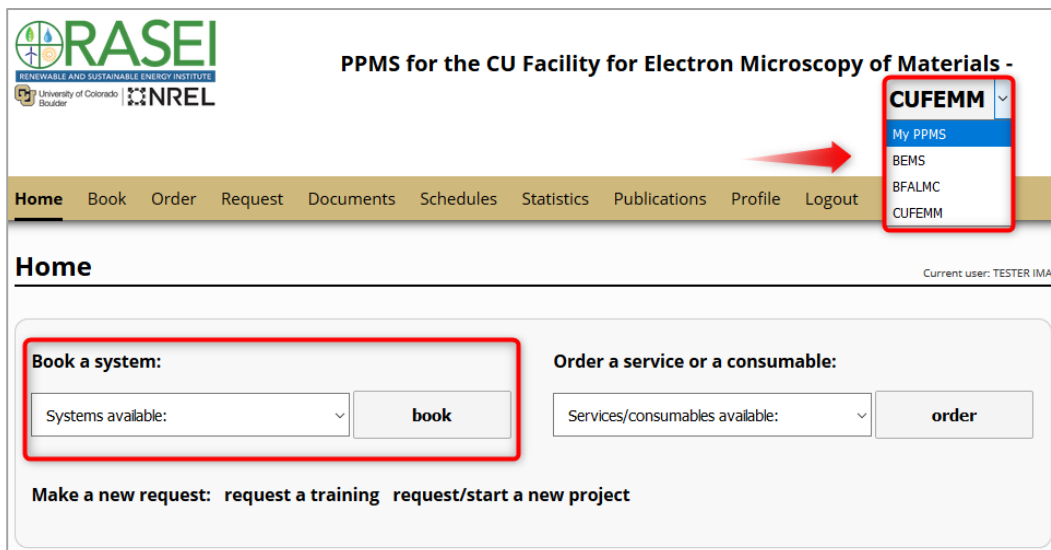
- 5) Admins will contact you if they have questions. If they do not have questions, they will create the project.
- 6) You will need to create a separate Project Request for each SpeedType.

Step 6. The request has been submitted. Once the request is approved, the user will receive an email notification.

4) 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.

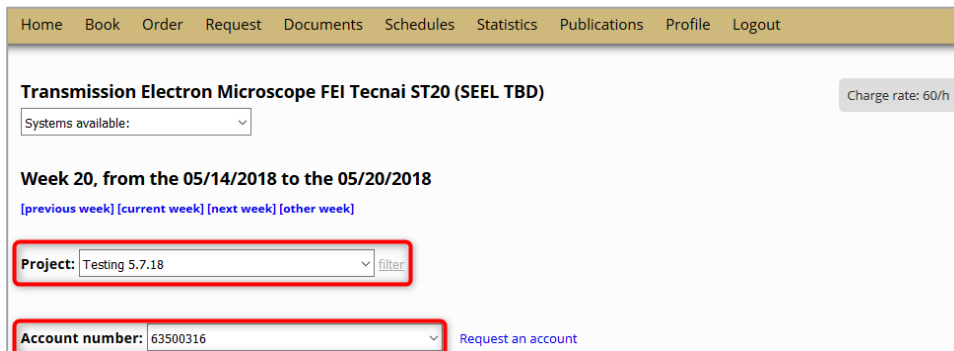


Troubleshooting Tip: If the system you are looking for is not listed, it may be for two reasons:

- (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](#)
Charge rate: n/a

Systems available:

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.

Charge rate: n/a

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

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

Book the selected sessions

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

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	Wohlrwend Compact 02 High Pressure Freezer show description add a comment	1	-	1	1+ : 12.00	0	0.00
TOTAL						Quantity	Price
						3	315.00

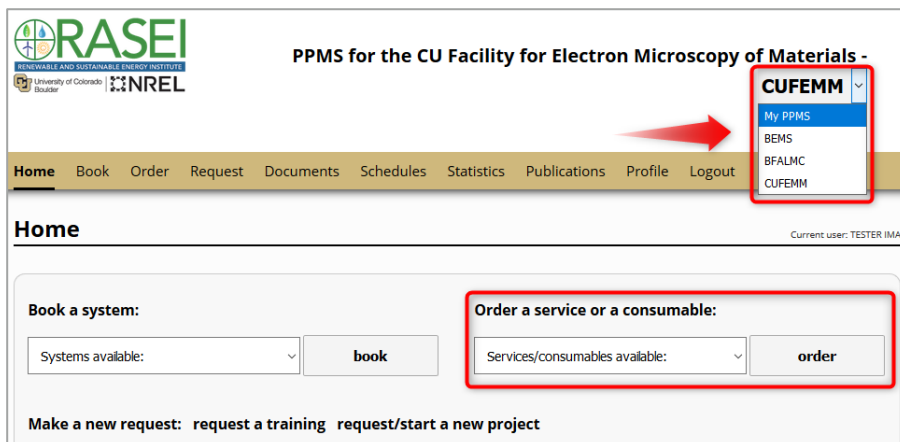
If you have a PO number for this order, please enter it here:

Order
Save quote

5) Place a Service Order (for Training) or Consumable 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.



PPMS for the CU Facility for Electron Microscopy of Materials -

CUFEMM

My PPMS
BEMS
BFALMC
CUFEMM

Home Book Order Request Documents Schedules Statistics Publications Profile Logout

Home Current user: TESTER IMA

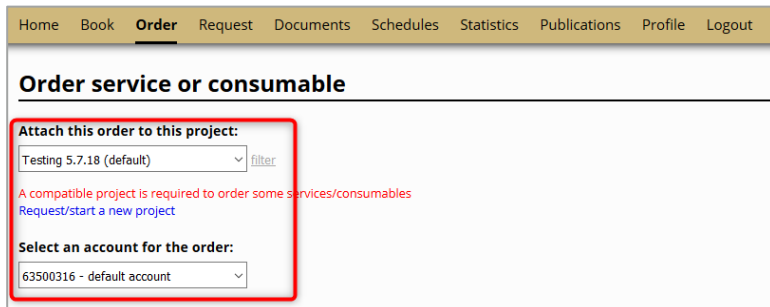
Book a system:

Order a service or a consumable:

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].”



Home Book **Order** Request Documents Schedules Statistics Publications Profile Logout

Order service or consumable

Attach this order to this project: [filter](#)

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

Select an account for the order:

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

Review labor and resource estimations here

Admin Use Only		Unit price	Quantity	Price	
#030007	Technical Assistance	104.00	2	208.00	show user's comments added
#030010	TEM (300kV)	175.00	2	350.00	show user's comments added
Service Requests (to be completed by BEMS)		Unit price	Quantity	Price	
#030013	Cryo-Sample Preparation Service (service form)	0.00	1	0.00	show description show user's comments
TOTAL			5	558.00	



Export as a spreadsheet

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

Save

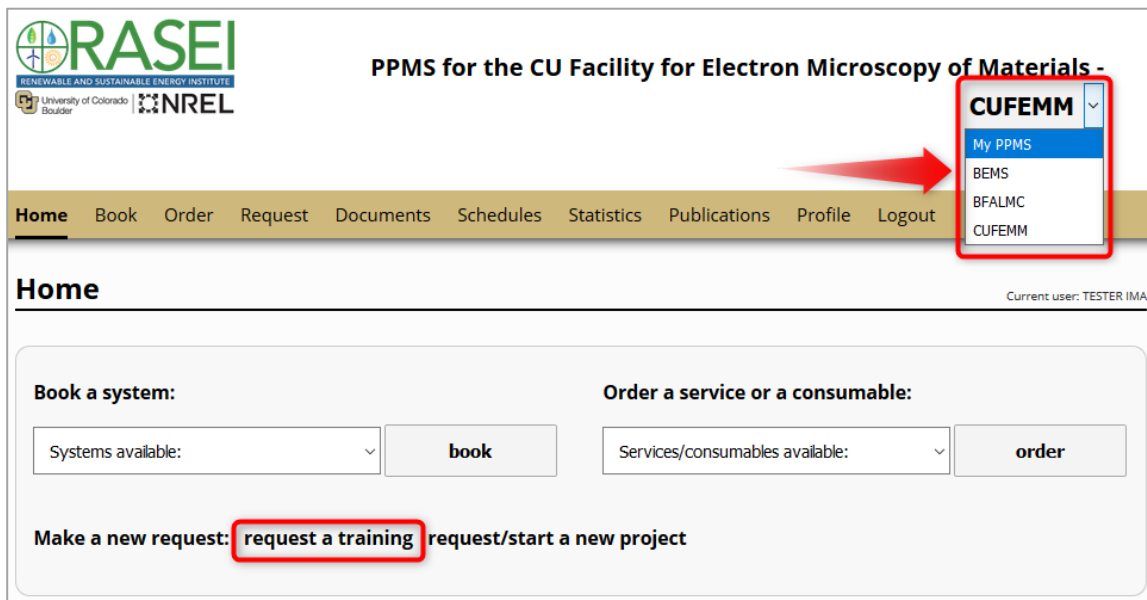
Make the order

Cancel this quote

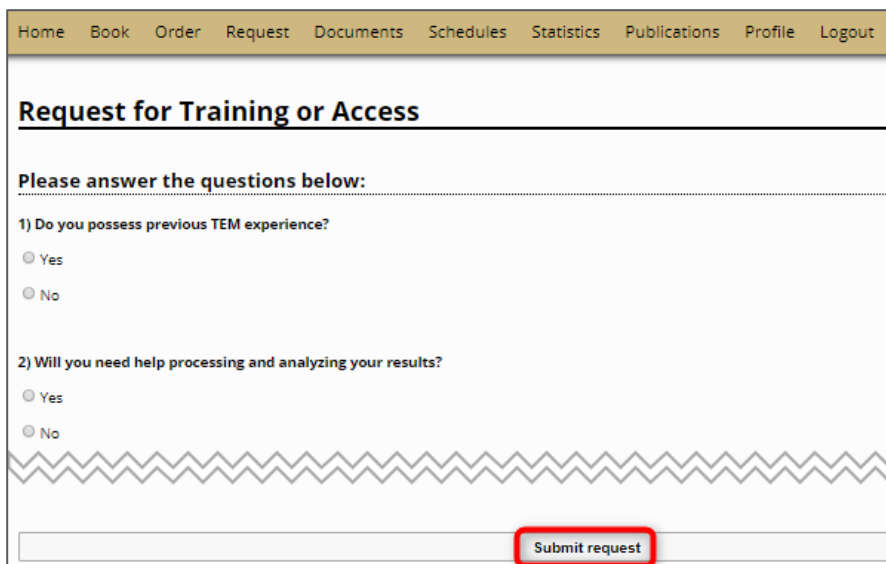
6) Request Training

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.

NOTE: Remember to order your training as a Service (as in 5) above.