

This user guide provides step by step instructions for account creation and the primary functions performed using PPMS at [CU-Boulder Electron Microscopy Services](#).

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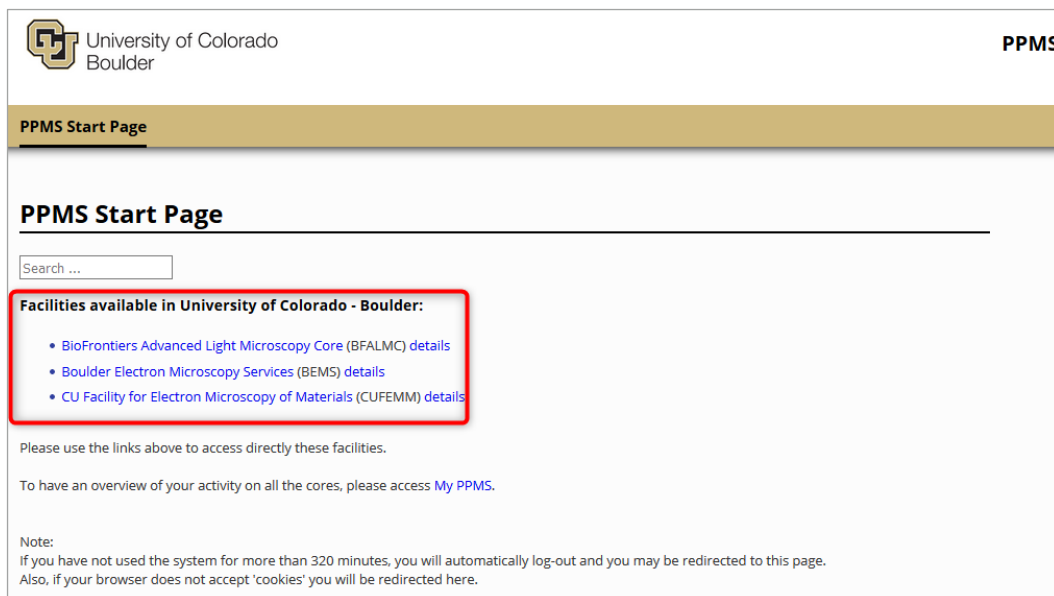
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1) Create an Account

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:

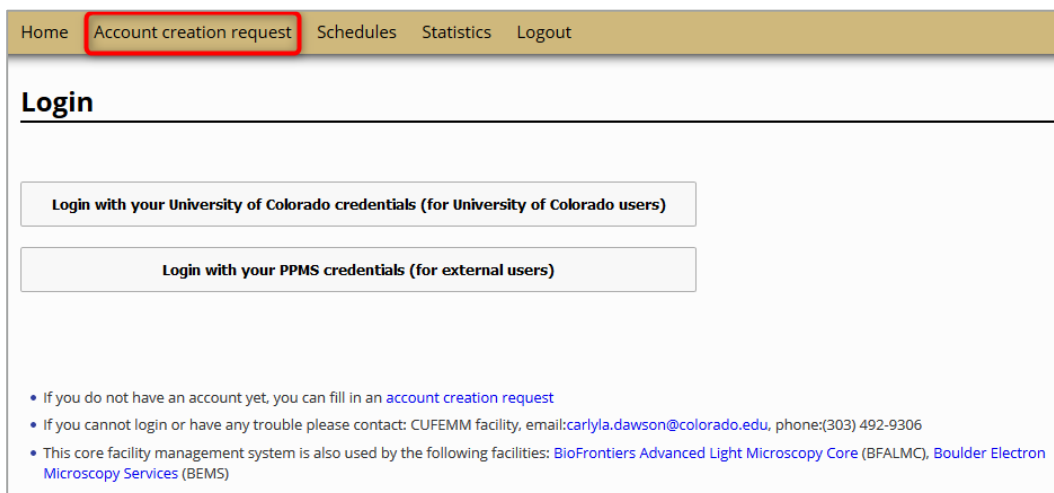
Step 1: Navigate to <https://ppms.us/cuboulder>.

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



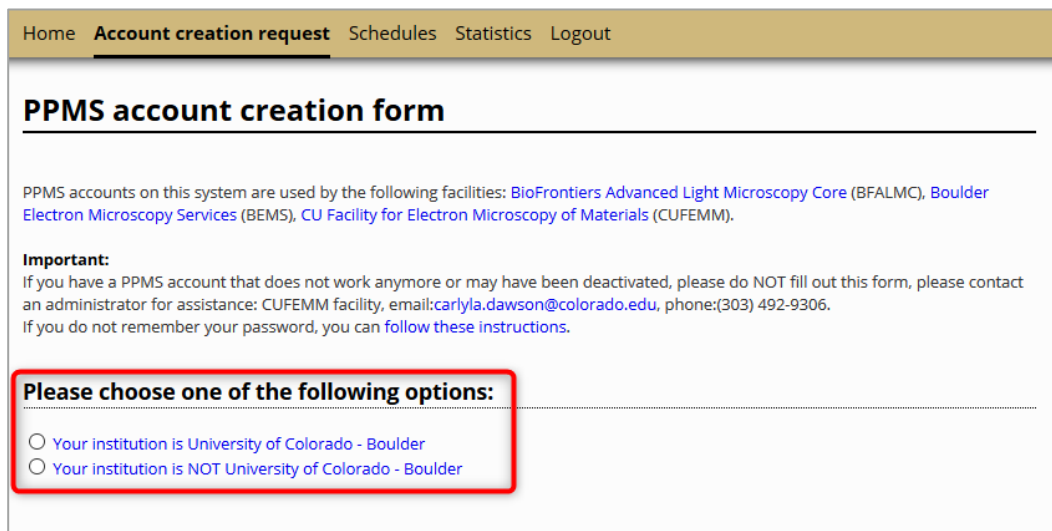
The screenshot shows the 'PPMS Start Page' for the University of Colorado Boulder. At the top left is the university logo and name, and at the top right is the 'PPMS' label. Below the header is a search bar. A red box highlights a section titled 'Facilities available in University of Colorado - Boulder:' which contains three links: '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 \(CUFEMM\)](#).

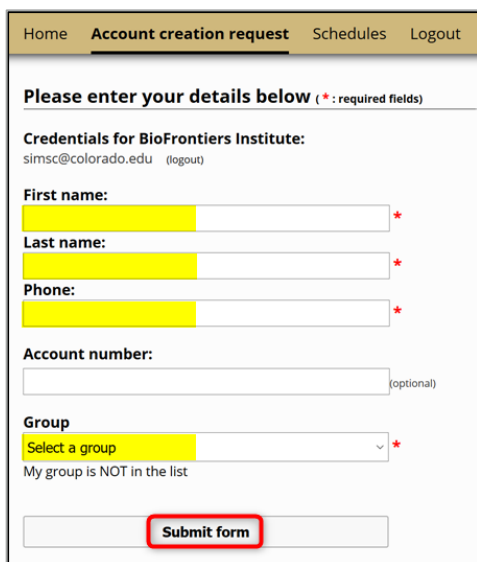
Important:
 If you have a PPMS account that does not work anymore or may have been deactivated, please do NOT fill out this form, please contact an administrator for assistance: CUFEMM facility, email: carlyla.dawson@colorado.edu, phone: (303) 492-9306.
 If you do not remember your password, you can [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:

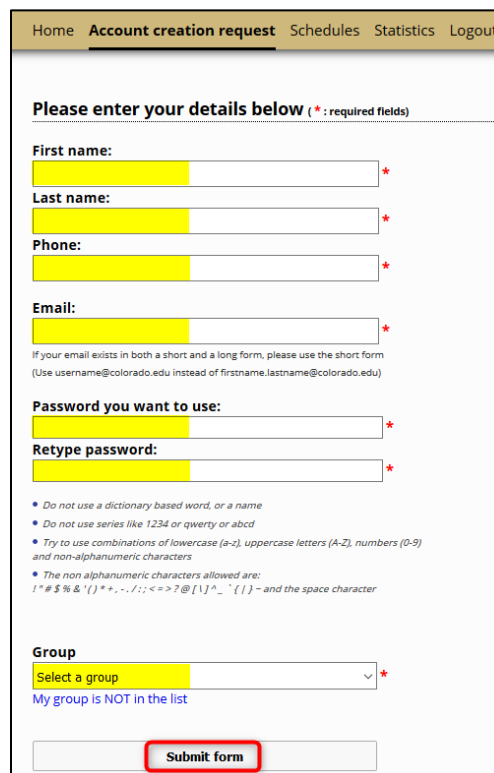
Phone:

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

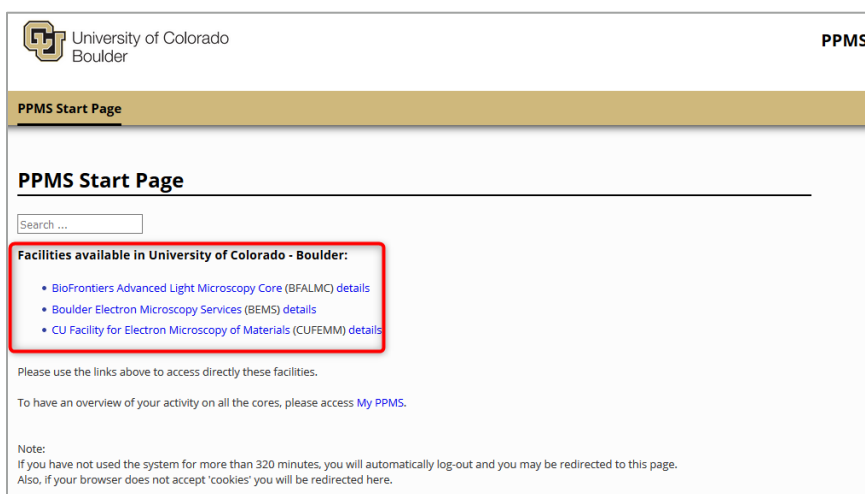
Group
 Select a group
 My group is NOT in the list

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:

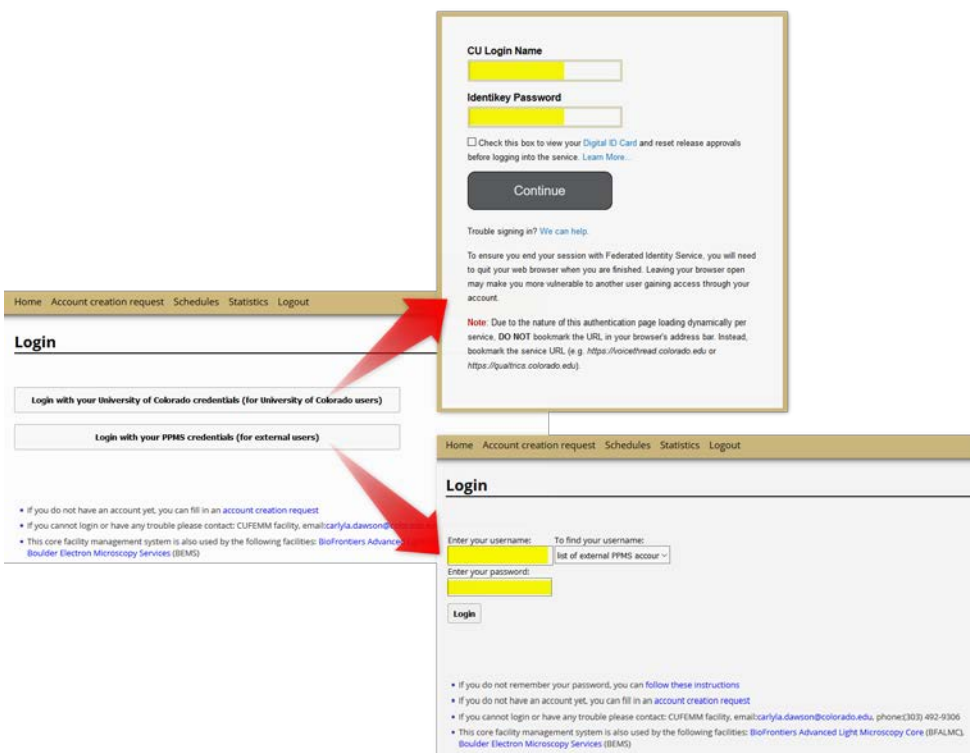
- [BioFrontiers Advanced Light Microscopy Core \(BFALMC\) details](#)
- [Boulder Electron Microscopy Services \(BEMS\) details](#)
- [CU Facility for Electron Microscopy of Materials \(CUFEMM\) details](#)

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.



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

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

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

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](#)

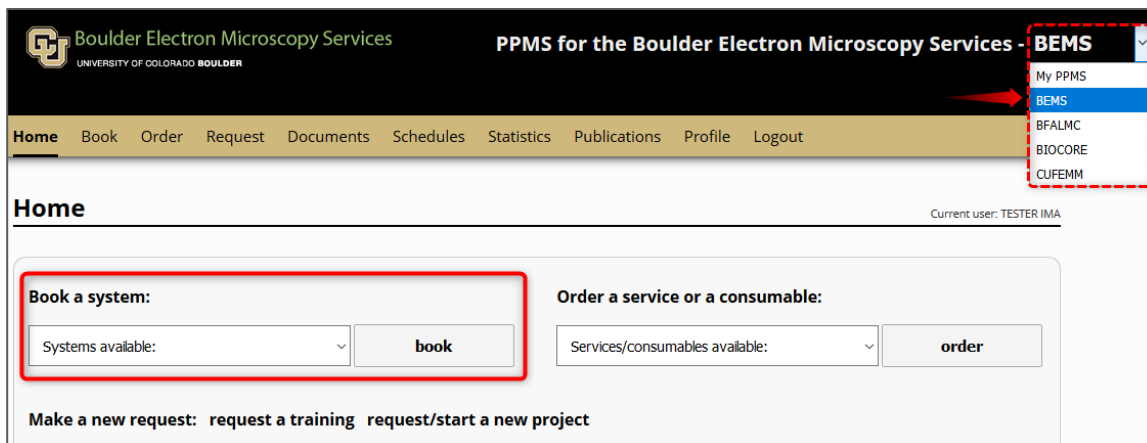
• if you cannot login or have any trouble please contact: CUFEMM facility, email: carlyla.dawson@colorado.edu, phone: (303) 492-9306

• 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 3 steps:

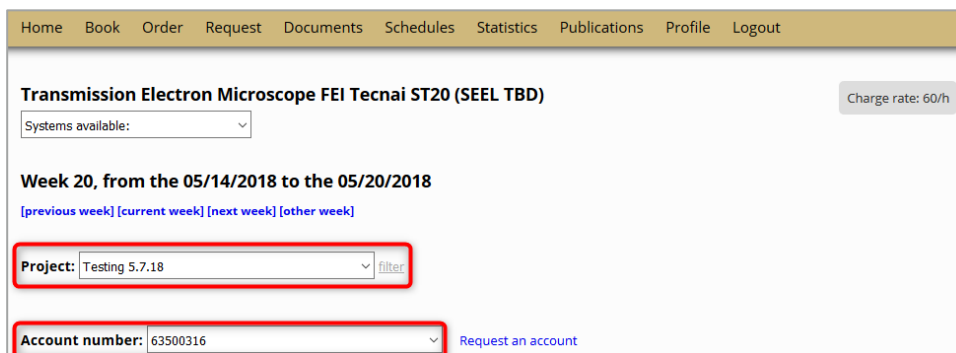
Step 1: From the *Home* page, open the **Systems available** dropdown and select the system.



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

- 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.
- You may not have permission to book. Click '**Request a training**' or contact the Core Manager directly.

Step 2: You will be directed to the scheduling page. Click the **Project** dropdown and select the appropriate speedtype. **Verify the account number is correct.**



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

- You have not been added as authorized user on this speedtype. Contact Core Manager if this is an error.
- 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 and click **Book the selected sessions** at the bottom of the calendar.

[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
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"/>

☐ 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.

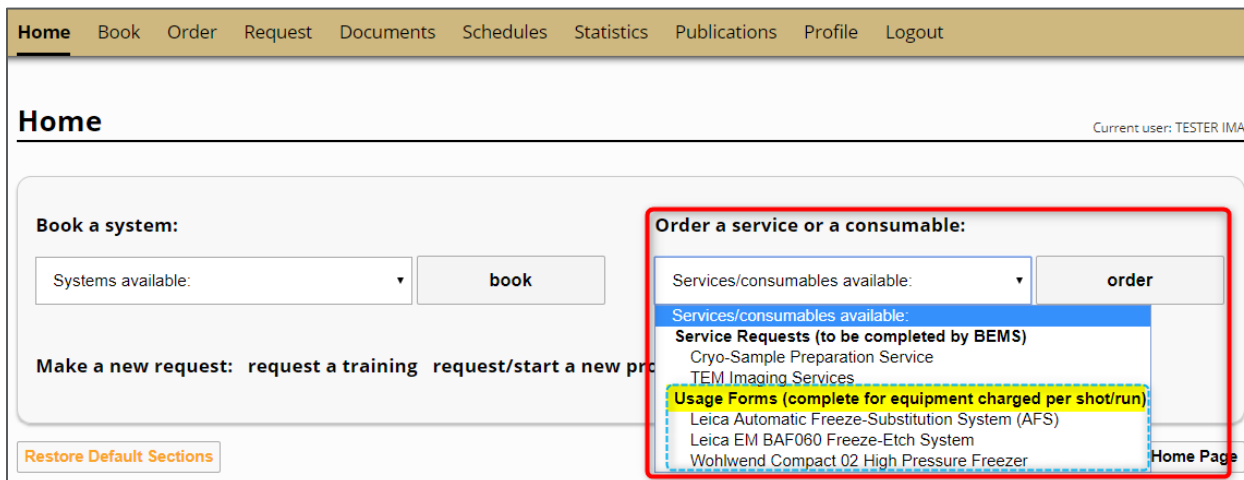
The charge rate for the service/system is posted here.

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

NOTE: If the system you booked is charged per shot/run - please see next page for additional instructions.

If the system you booked is billed *per shot/run*, please submit a *Usage Form*.

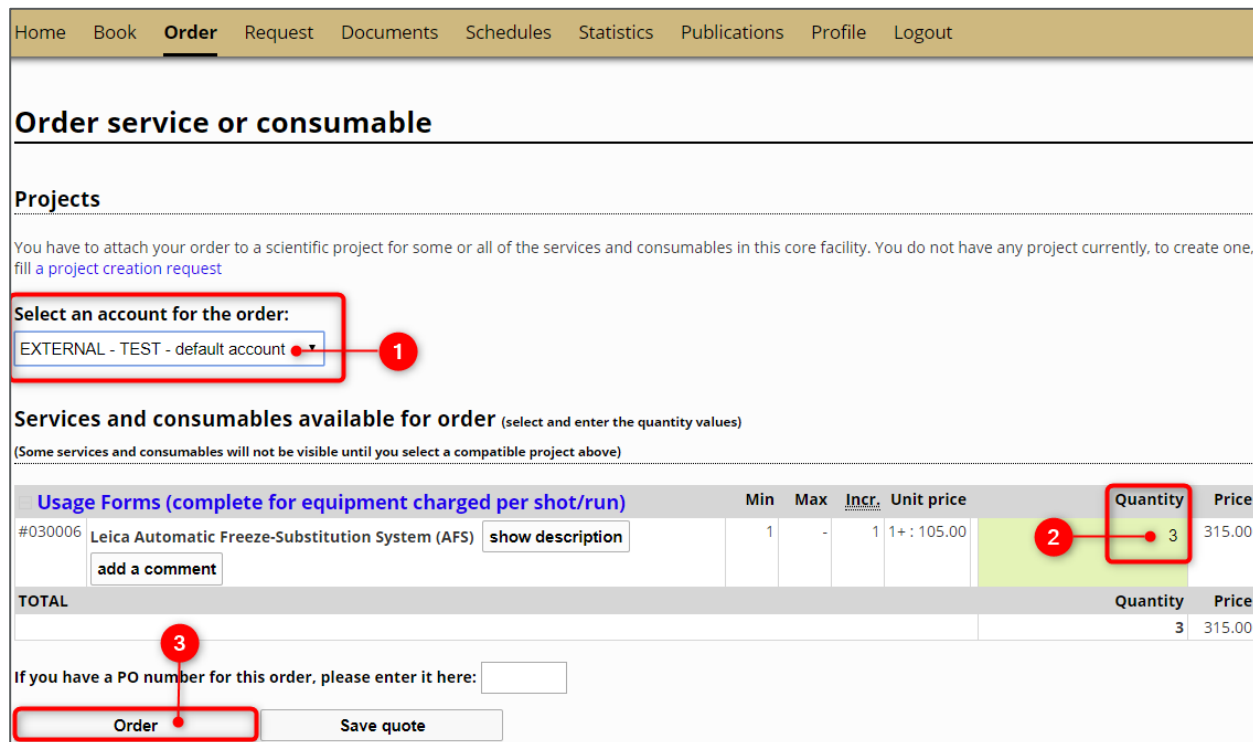
Usage forms are available from the “*Order a service...*” dropdown menu on the Home page:



The screenshot shows the Home page with a navigation bar (Home, Book, Order, Request, Documents, Schedules, Statistics, Publications, Profile, Logout). The 'Home' section includes a 'Book a system' form and a 'Make a new request' section. The 'Order a service or a consumable' dropdown menu is open, showing options like 'Service Requests (to be completed by BEMS)', 'Usage Forms (complete for equipment charged per shot/run)', and 'Leica Automatic Freeze-Substitution System (AFS)'. The 'Usage Forms' option is highlighted in yellow.

Complete the form following these 3 steps:

- (1) Select the project (i.e. speedtype) to charge from the dropdown.
- (2) Enter the number of shots/runs in the quantity field (highlighted green).
- (3) Click **Order**.



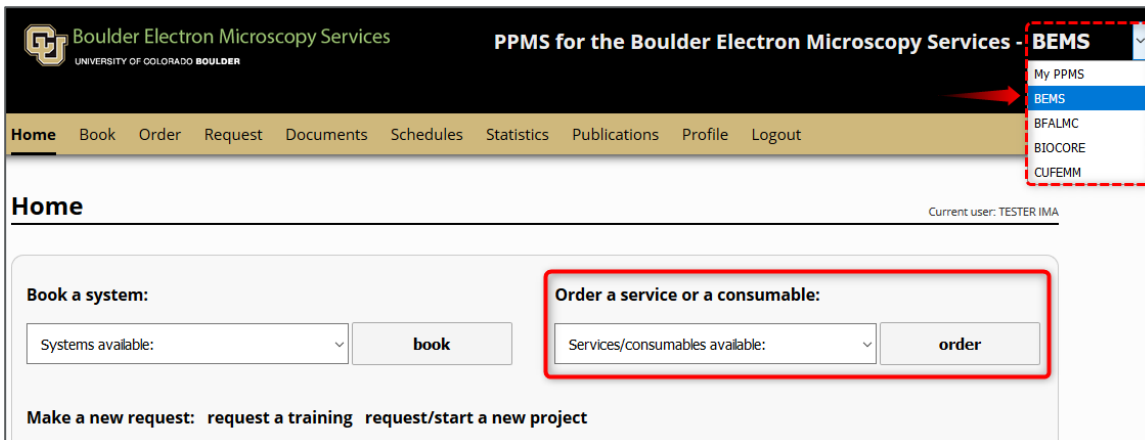
The screenshot shows the 'Order service or consumable' form. Step 1: 'Select an account for the order:' dropdown menu with 'EXTERNAL - TEST - default account' selected. Step 2: 'Usage Forms (complete for equipment charged per shot/run)' row in the table, with the 'Quantity' field highlighted in green and the value '3' entered. Step 3: The 'Order' button at the bottom of the form.

	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	1	-	1	1+ : 105.00	3	315.00
TOTAL							315.00

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.



Boulder Electron Microscopy Services
UNIVERSITY OF COLORADO BOULDER

PPMS for the Boulder Electron Microscopy Services - **BEMS**

Home Book Order Request Documents Schedules Statistics Publications Profile Logout

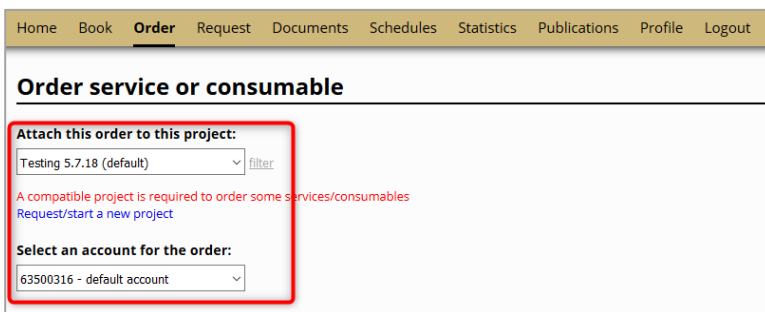
Home Current user: TESTER IMA

Book a system:
Systems available:

Order a service or a consumable:
Services/consumables available:

Make a new request: [request a training](#) [request/start a new project](#)

Step 2: You will be directed to the order form page. Click the **Project** dropdown and select the appropriate speedtype. **Verify the account number is correct.**



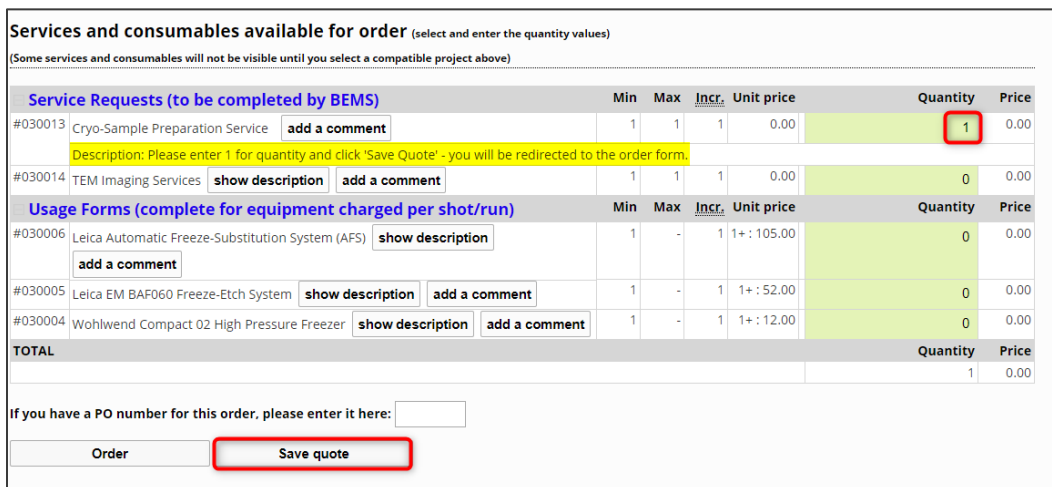
Home Book **Order** Request Documents Schedules Statistics Publications Profile Logout

Order service or consumable

Attach this order to this project:
Testing 5.7.18 (default)
A compatible project is required to order some services/consumables
[Request/start a new project](#)

Select an account for the order:
63500316 - default account

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 <input type="button" value="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 <input type="button" value="show description"/> <input type="button" value="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) <input type="button" value="show description"/> <input type="button" value="add a comment"/>	1	-	1	1+ : 105.00	0	0.00
#030005 Leica EM BAF060 Freeze-Etch System <input type="button" value="show description"/> <input type="button" value="add a comment"/>	1	-	1	1+ : 52.00	0	0.00
#030004 Wohlwend Compact 02 High Pressure Freezer <input type="button" value="show description"/> <input type="button" value="add a comment"/>	1	-	1	1+ : 12.00	0	0.00
TOTAL					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):

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**.

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	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			Quantity	Price
			5	558.00



[Export as a spreadsheet](#)

If you have a PO number for this order, please enter it here: [Save](#)

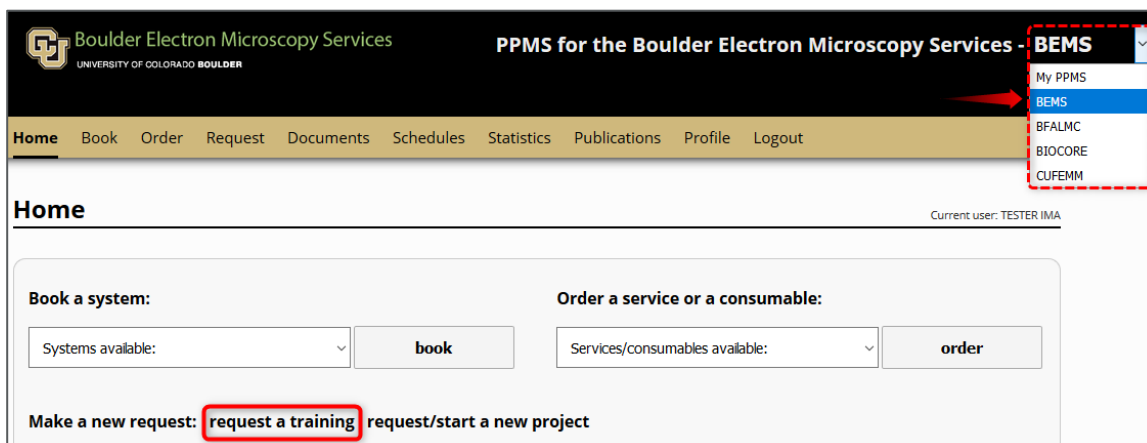
Make the order [Cancel this quote](#)

Review labor and resource estimations here

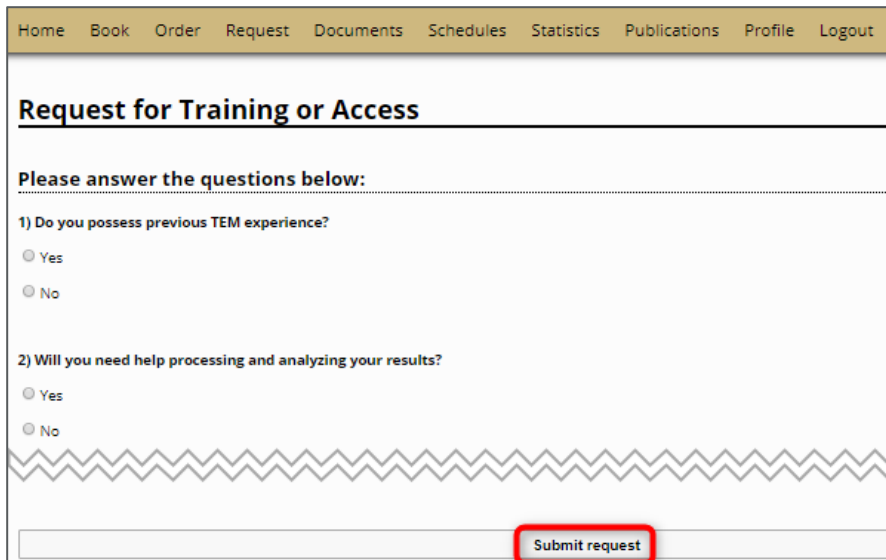
5) Request Training

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.



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

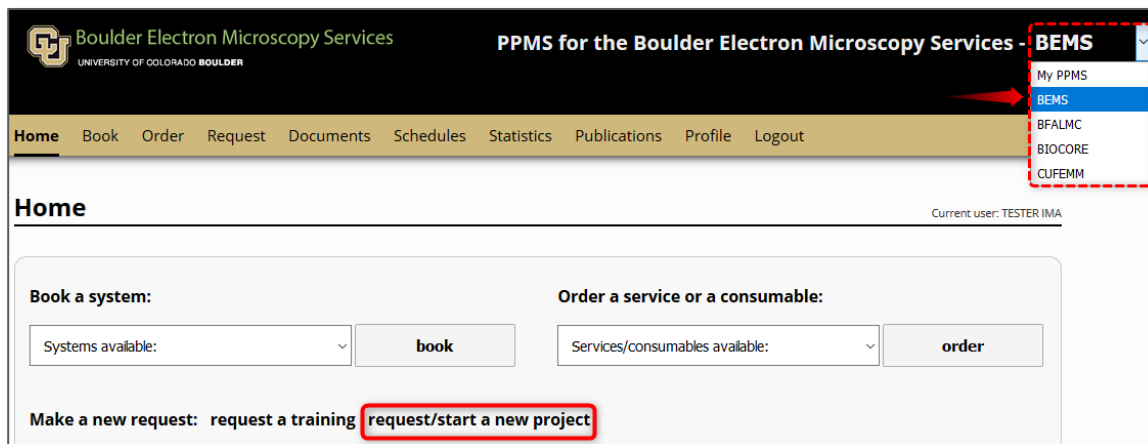


You will be contacted by the Core Manager to coordinate the training.

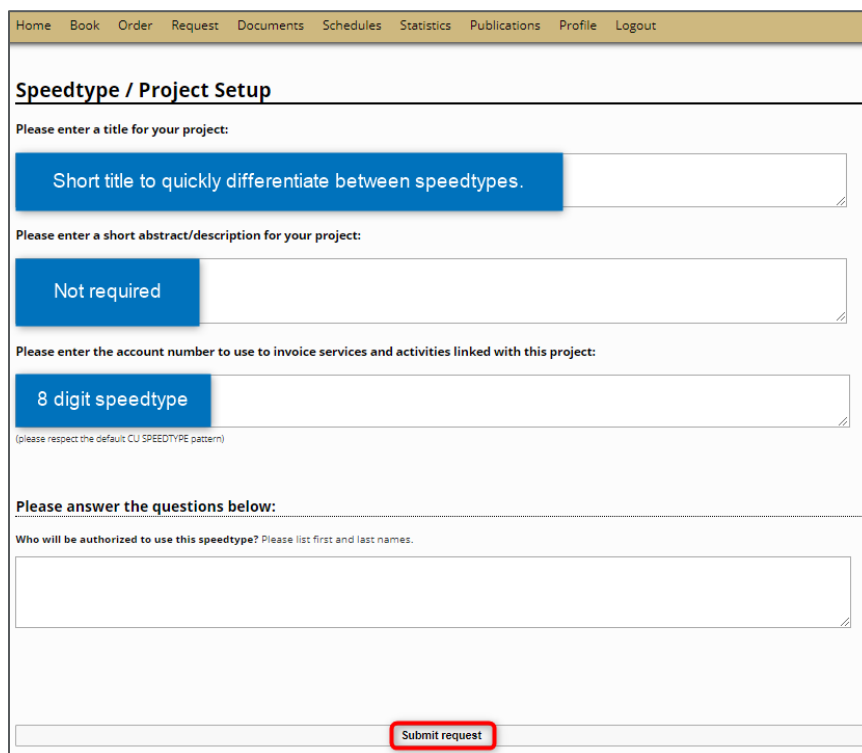
6) Setup Speedtype in PPMS – *performed by PIs only*

When booking a system or requesting a service, you will need to identify which speedtype to charge. If you only have one speedtype, that will still need to be associated to the request. In PPMS, you can define the different speedtypes by creating “projects.”

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



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



You will receive a notification from PPMS once the speedtype is setup and ready to use.