

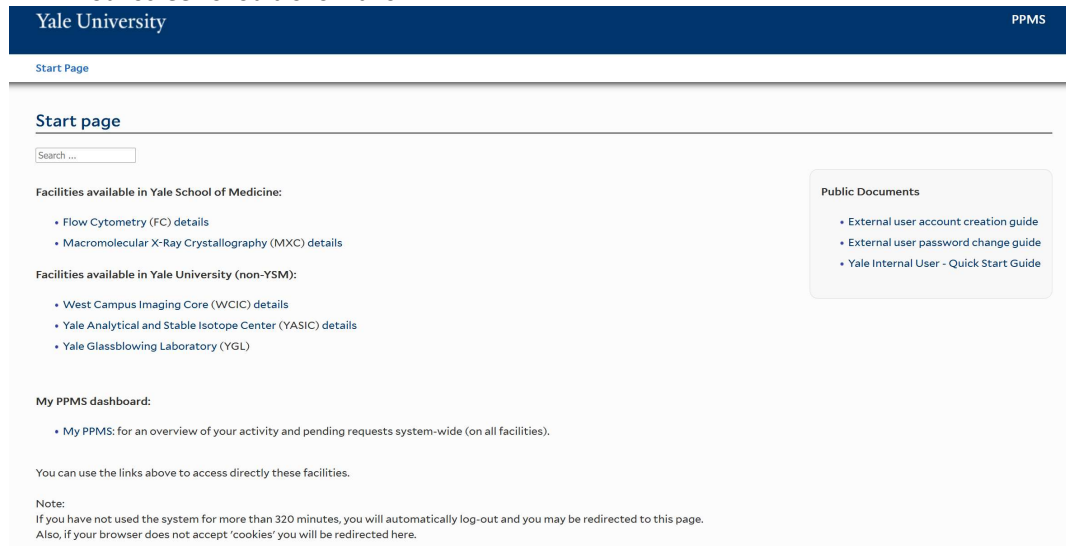
User Creates a Request

Thursday, November 17, 2022 9:40 AM

Class Shop Requests for Work:

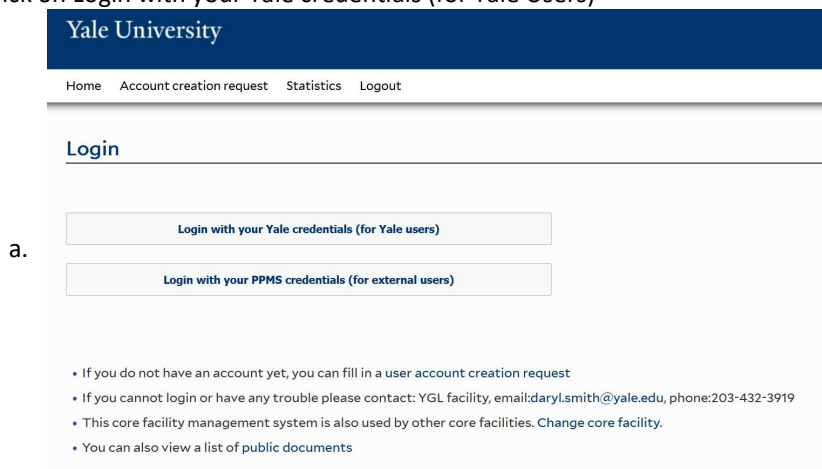
1. Navigate online to <https://ppms.us/yale/start/>
2. Use your Net-ID and Password to log into the system.
 - a. All Chemistry users through 10/31/22 who were active at that time were pre-loaded, and your account/s to charge was linked to your profile. Or, if you are a split charging user, the set has been pre-loaded per your PI's instructions. If we missed you, we apologize.
 - b. If you do not have an approved user profile in PPMS, you can create one -**Attached to this notice are the instructions to create a profile and to request access to a financial account.**

Your screen should show this:



The screenshot shows the 'Start page' of the Yale University PPMS system. At the top, there is a dark blue header with 'Yale University' on the left and 'PPMS' on the right. Below the header is a search bar and a list of facilities available in the Yale School of Medicine and Yale University (non-YSM). A 'Public Documents' box on the right contains links to external user account creation and password change guides, and a Yale Internal User Quick Start Guide. A 'My PPMS dashboard' section provides a link to an overview of activity and pending requests. A note at the bottom states that users will be automatically logged out after 320 minutes of inactivity.

3. Click on the Yale Glassblowing Laboratory (YGL) link.
4. Click on Login with your Yale credentials (for Yale Users)



The screenshot shows the 'Login' page of the Yale University PPMS system. At the top, there is a dark blue header with 'Yale University' on the left and navigation links for 'Home', 'Account creation request', 'Statistics', and 'Logout' on the right. Below the header is a 'Login' section with two buttons: 'Login with your Yale credentials (for Yale users)' and 'Login with your PPMS credentials (for external users)'. A list of links and notes is provided below the buttons, including a link to a user account creation request, contact information for the YGL facility, and a link to public documents.

5. You will see the home or start page, Under the word Home - Make a new request: click "request/start a new project."

a.

Home

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

b. The request form opens. Fill out the following fields:

- i. Please enter a title for your project: **Enter your first and last name - PI you work for.**
- ii. Please enter a short abstract/description for your project: **Describe the work and any other important information of what your request is for. In this box, you can also give the glassblowers information, like "I will come down with my drawing to discuss" or "I have emailed the drawing to you"**
- iii. Please define the account number to use for services and activities linked with this project: **This is a drop down menu and will only contain your approved charging, if you think it is incorrect, please email chemistry.finances@yale.edu with your name, netID, PI, and the charging you think it should be.**
 - 1) **Also to note: If you are on a grant and Workday is not updated by central grants office before the installment end date occurs or before an extension is approved, you won't be able to use your grant number, but we have included a suspense coa you can use. It looks like this YD000001.CC0505.PG99999.PJ000001.PIAssignee. Go ahead with your order using this number and the accountants will get it to the correct grant when it becomes available.**
- iv. Please answer the questions below:
 - 1) Provide any additional information you would like.
 - a) In this box, you can add any additional info you would like, a phone number to be reached at etc.
- v. Click the submit button - your order is now with the Glass Shop Staff.
- vi. Below is a snippet of this form:

Glass Shop Request, please include your name and PI in the project title

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:

CO01---YD000002-CC0504-PG00401-PJ000001
Request to be authorized for another financial account

Please answer the questions below:

Provide any additional information you would like.

Submit request

Creating a profile

Requesting access to a financial account