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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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.

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.
2) Log in to PPMS

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

**Step 1:** Navigate to [https://ppms.us/cuboulder](https://ppms.us/cuboulder) and click on the name of the appropriate *facility* from the list.

![PPMS Start Page Image](Image)

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

![Login Page Image](Image)
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.

![Image of PPMS system selection](image)

**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. 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.**

![Image of PPMS scheduling page](image)

**Troubleshooting Tip:** If the project 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 and click **Book the selected sessions** at the bottom of the calendar.

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### Sample Preparation Leica Automatic Freeze-Substitution (80020) More information

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

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."

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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.

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*Receive a notification by email if someone cancels a booking.*
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:

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**.
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.

![Home page screenshot]

**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.**

![Order form screenshot]

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

![Order form screenshot]
Step 4: An order form will display. Answer the questions and click Submit form.

![Cryo-Sample Preparation Order 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]
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.

![PPMS Home Page](image)

Step 2: Complete the form and click Submit request.

![Speedtype/Project Setup Form](image)

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