Stratocore (PPMS) New GROUP (Lab/PI) set up for UC investigators:

1) Before starting the process please talk to your businessperson to have your default payment account string information available: The typical format for a grant: G100122-6262412003-1-10143XX

Fund-cost center-FA-Grant number

2) Connect to the UC Stratocore website at <u>https://ppms.us/uc/start/</u> which should launch the page below:

3) Select the core facility you wish to use and then select <u>account creation request</u> (note that if you are already a registered user with any of the cores you can just select Login with your UC credential as indicated by the star):
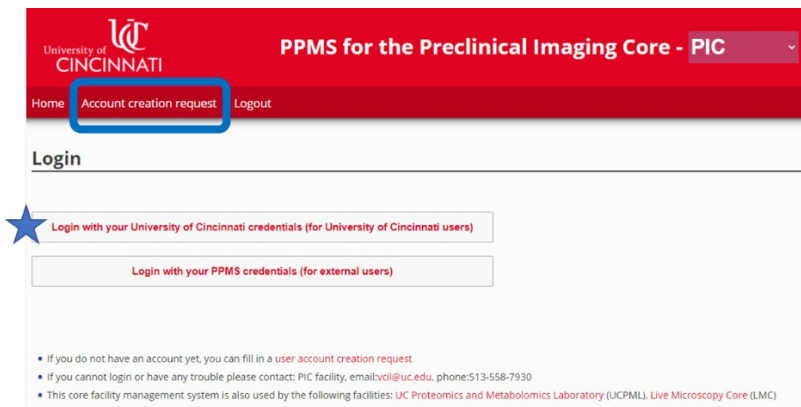
4)Then select your institution as UC
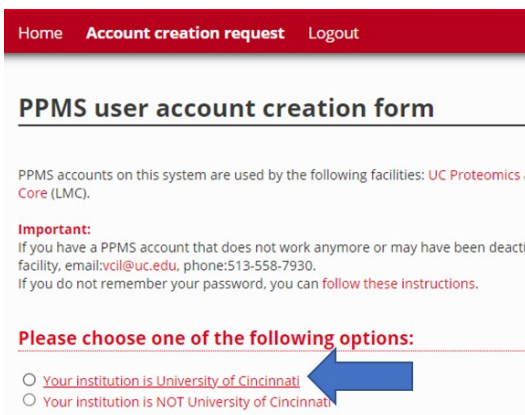
5) When prompted you should login with your normal UC credential and then provide the requested information about your GROUP profile (see examples below) including selecting a department/division, a business contact and also creating a default account string to be used for charging your core activities. If you are uncertain about a specific field, you can leave it blank and we will work with you to include the necessary information.

Create a new group (note that a PI is a designated group)

mandatory parameters

Group PI or director full name: (Lastname, Firstname)
`Greis, Ken` *

Group name:
`Greis Lab` *

Group PI or director email:
`greiskd@uc.edu` *

Example information

Please use the 6+2 user format for email

Group unique id:
`greiskd` *

Group PI or director ORCID:
`0000-0002-5316-3351`   Kenneth Greis ✓

Please enter your ORCID so we can track publications

Group default financial account#:

○ Do not use any financial account for the group
(WARNING: users from this group will be prevented from booking unless they have a financial account attached to their profile, or to the profile of their project, or are allowed to use a specific financial account)

◉ Specify the financial account to use for this group as a default financial account
(This financial account will only be used, if the user's profile and the project's profile - if a project is selected - do not have a financial account, and if no other financial account is selected)

`D600056-6261303200-1`

Select this field to enter your default account string

Instructions for account creation are on the next page

Group administrative contact name:
`Betsy Russell`

Group administrative contact email:
`betsy.russell@uc.edu`

You can add your designated business contract if you would like them to also receive billing invoices.

Group administrative contact phone:
`513-558-0074`

Group administrative contact fax:
``

Department:
`COM-Cancer Biology` * [Choose a Choose a department ▾]   Pull down with dept/division

Institution:
`University of Cincinnati` * [Choose a Choose an institution ▾]

Invoicing address:
`Not needed`

Affiliation
[UC ▾]

Group manager(s)
`Haffey Wendy`   [Remove]

Add a group manager:
[Choose a user ▾] [Add] filter

Can designate a group manager once you staff register as users

External Group:
☐

Active:
☑

[Save]   Please save your profile

6) Creating a financial account

CREATE ACCOUNT Please consult your finance person for full account string

Account Type: Select internal as account type

Internal ▾ *

New account number: This will fill automatically as you add the account string part below
It will also automatically validate against active account in the UC system *

Short description:
Please include your name in the short description (e.g., Smith NCI R01 grant)

Description:

Add a bit more detail as you see fit

This financial account is populated using the metadata of the custom parameters that are defined below.
Super admins can update these custom parameters and therefore the account bcode here.

Fund: Required

*

Cost center: Required

*

FA: Required

*

Grant: Only required if a grant number is available

ION: Only needed if tracking as part of an internal order number

Start date:
no start date **add one**

Expiration date:
no expiration date **add one** Please include an end date for grants and other
accounts if available

Active:
☑

Save Please save your account

You need to specify the account number.