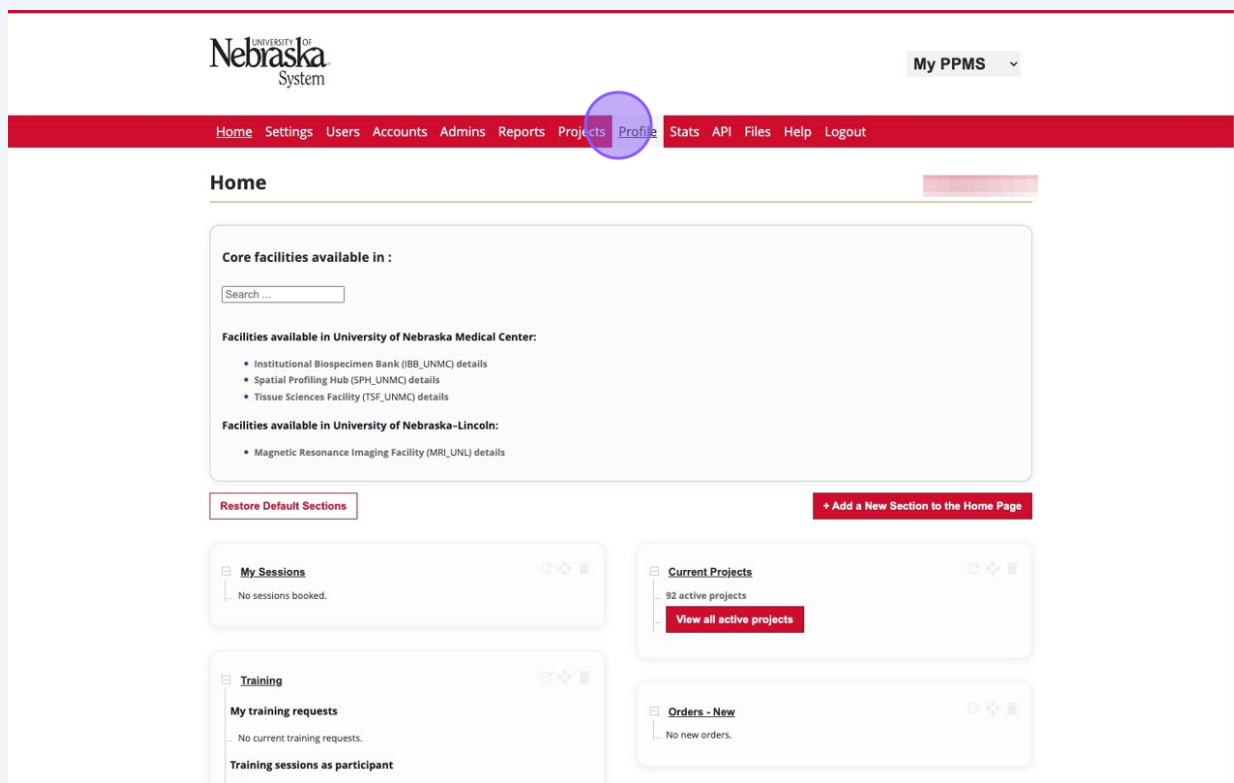


For Lab Members - How to Request Access to a Cost Object

This guide provides a step-by-step process for lab group members to request access to a cost object in PPMS.

If you need to have financial account management (e.g., for PIs and department finance administrators), please see UNMC's Stratocore PPMS Financial Management for resources and guides - www.unmc.edu/research-resources/resources/strat...

1 Click "Profile"



2 Click "New account authorization request"

Home Settings Users Accounts Admins Reports Projects Profile Stats API Files Help Logout

Communications on webinars:

Save

Financial Account Information

Default Financial Account Number:

Change your default account number

Request authorization to use a financial account:

New account authorization request

Request authorization to manage a financial account:

New account management request

Financial Accounts available for use:

Account Number	Account Type	Origin	Start	End
		your account number		
		authorization		

Code-based authentication and 2-factor setup

Setup or configure code-based authentication and 2-factor login

User files

No files

3 Enter cost object number.

Home Settings Users Accounts Admins Reports Projects Profile Stats API Files Help Logout

Communications on webinars:

Account authorization request

Select an account type

NU Internal (SAP)

Type Description:

Select or create an account

search an account...

You may add a note or comment that will be attached to this request:

4

Select cost object from drop down if it shows up **or** click "create this new account".

All cost objects will be validated with SAP. Invalid cost objects cannot be added.

Home Settings Users Accounts Admins Reports Projects Profile Stats API Files Help Logout

Communications on webinars:

Account authorization request

Select an account type

NU Internal (SAP)

Type Description:

Select or create an account

Create this new account Warning: this account number is not valid.

You may add a note or comment that will be attached to this request:

Cancel Save

No files

5

Click the "You may add a note or comment that will be attached to this request:" field.

The screenshot shows a web application interface for an 'Account authorization request'. At the top, there is a dark red navigation bar with links: Home, Order, Request, Documents, Statistics, Reports, Publications, Profile, and Logout. Below this is a dark grey bar with links: Rights, Projects, Orders, Stock, Settings, Users, Accounts, Admins, Invoicing, and Help. The main content area has a grey header titled 'Account authorization request'. Below the header, the form contains the following elements: a section titled 'Select an account type' with a dropdown menu showing 'NU Internal (SAP)'; a 'Type Description:' label; a section titled 'Select or create an account' with a search input field labeled 'search an account...'; and a text area with the label 'You may add a note or comment that will be attached to this request:'. A purple circle highlights the text area label.

Home Order Request Documents Statistics Reports Publications **Profile** Logout

Rights Projects Orders Stock Settings Users Accounts Admins Invoicing Help

Account authorization request

Select an account type

NU Internal (SAP)

Type Description:

Select or create an account

search an account...

You may add a note or comment that will be attached to this request:

6

In order to properly configure the cost object, you must add the following information in the comment field:

1. Your PI and department financial administrator

- This information will be used to create the financial account managers for the cost object

2. Who you are requesting access for (individual requestor, your lab group, or specific project)

The screenshot shows a web application interface for an 'Account authorization request'. At the top, there is a navigation bar with links: Home, Order, Request, Documents, Statistics, Reports, Publications, Profile, and Logout. Below this is a secondary navigation bar with links: Rights, Projects, Orders, Stock, Settings, Users, Accounts, Admins, Invoicing, and Help. The main content area is titled 'Account authorization request' and contains the following sections:

- Select an account type**: A dropdown menu with 'NU Internal (SAP)' selected.
- Type Description:**: A section for providing details about the account type.
- Select or create an account**: A search bar with the placeholder text 'search an account...'.
- You may add a note or comment that will be attached to this request:**: A text area for adding a note or comment.
- PI: Department Financial Administrator - to be account managers and who this cost o**: A text field for providing the PI information.

7

Click "Save"

Home Settings Users Accounts Admins Reports Projects Profile Stats API Files Help Logout

Communications on webinars:

Account authorization request

Select an account type

NU Internal (SAP)

Type Description:

Select or create an account

You may add a note or comment that will be attached to this request:

Cancel

Save

No files

8

Click "Ok"

Home Settings Users Accounts Admins Reports Projects Profile Stats API Files Help Logout

Communications on webinars:

Account authorization request

Select an account type

NU Internal (SAP)

Type Description:

Select or create an account

You may add a note or comment that will be attached to this request:

Cancel

Save

Account Authorization Request

The request is complete.

Ok

No files

9

Wait for a system administrator to approve your request.