

For Account Managers: Adding and Managing Cost Objects in PPMS

This guide outlines the step-by-step process for financial administrators and/or PIs to add and manage cost objects in PPMS.

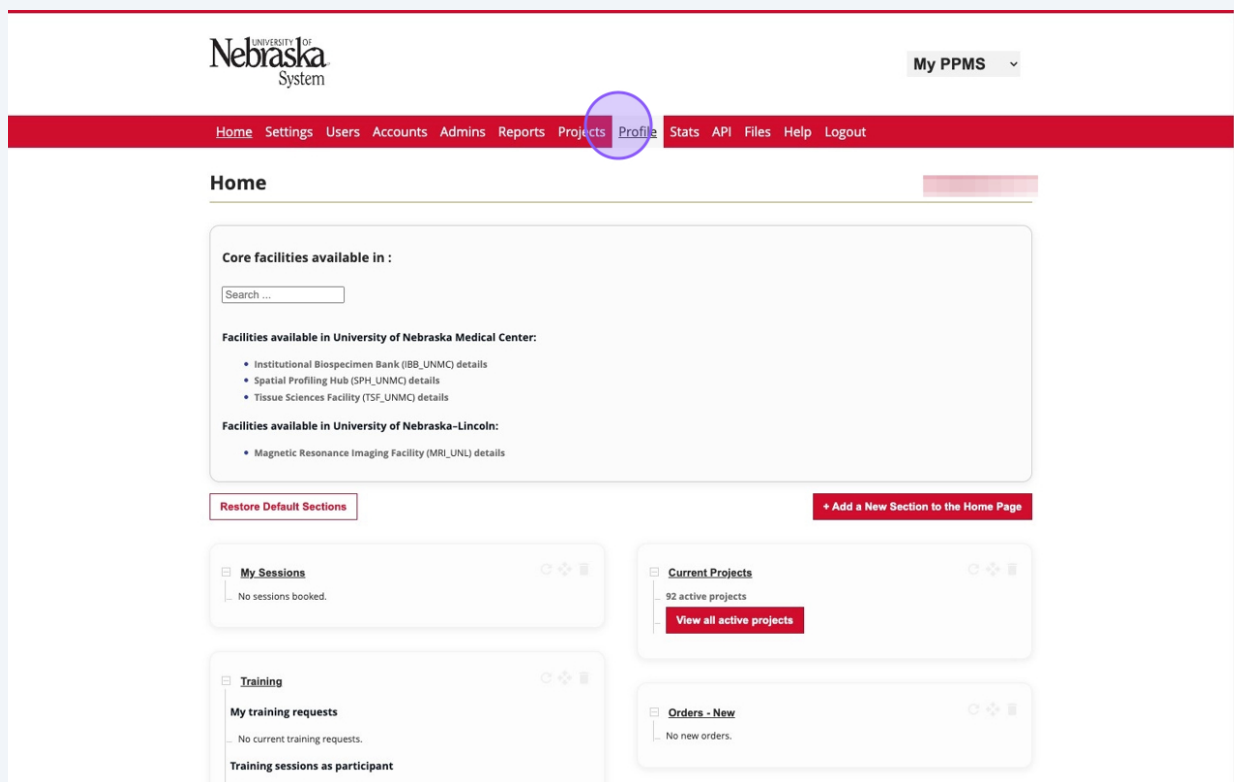
By following this guide, account managers will be able to oversee financial transactions, control account access, and ensure appropriate and compliant use of cost objects.

For more resources and information, visit UNMC's Stratocore PPMS Webpage: www.unmc.edu/research-resources/resources/strat...

- 1 Navigate to <https://ppms.us/unebraska/start> and log in with your UNMC SSO credentials.

- 2 Click "**Profile**" to add a cost object you do not already manage.

If the cost object is already in PPMS, skip to **Step 9**.



3

Under **Request authorization to manage a financial account** section, select **"New account management request"**.

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

Save

Financial Account Information

Default Financial Account Number:

Change your default account number

Request authorization to use a financial account:

Request authorization to manage a financial account:

Financial Accounts available for use:

Account Number	Account Type	Origin	Start	End
		your account number		
		authorization		
		authorization		

Code-based authentication and 2-factor setup

User files

No files

4

Enter cost object number.

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

Save

Account manager request

Select an account type

Type Description:

Select or create an account

5

Select the cost object from dropdown if it appears, or click "**create this new account**" if the cost object doesn't appear. If it appears in the dropdown, that means the cost object is already in PPMS.

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

Save

Account manager request

Select an account type

NU Internal (SAP)

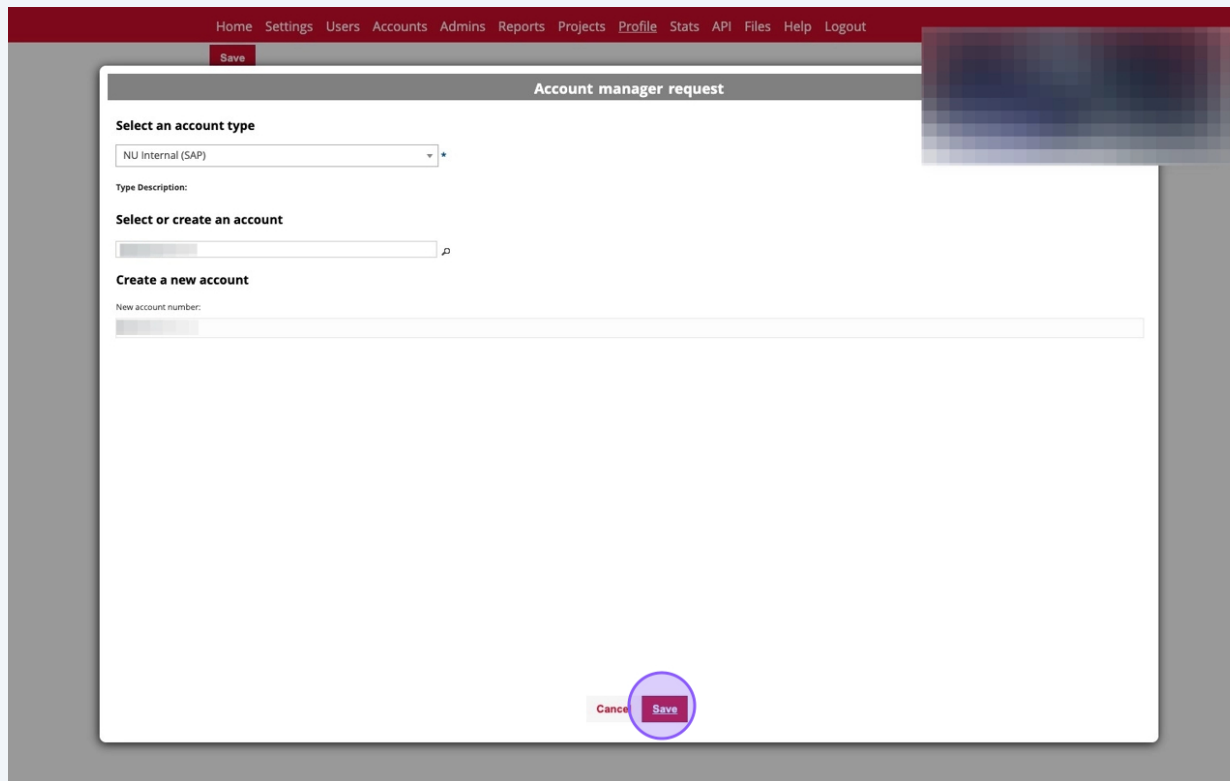
Type Description:

Select or create an account

Create this new account

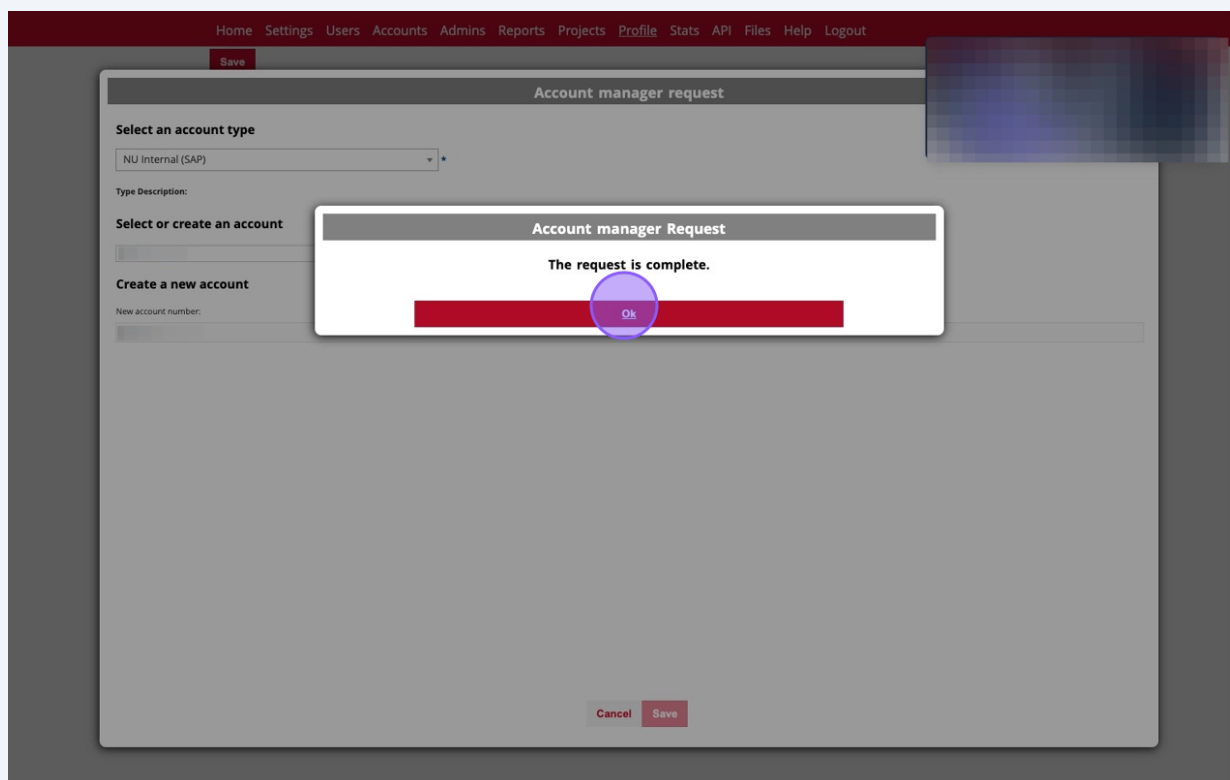
Cancel Save

6 Click "Save"



The screenshot shows a web application interface with a dark red header bar containing navigation links: Home, Settings, Users, Accounts, Admins, Reports, Projects, Profile, Stats, API, Files, Help, and Logout. Below the header, a modal window titled "Account manager request" is displayed. The modal has a "Save" button in the top left corner. The form inside the modal includes a dropdown menu for "Select an account type" (currently showing "NU Internal (SAP)"), a "Type Description:" label, a "Select or create an account" section with a text input field, and a "Create a new account" section with a "New account number:" label and a text input field. At the bottom right of the modal, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a purple circle.

7 Click "ok"



The screenshot shows the same web application interface as in step 6. The "Account manager request" modal is still open. A confirmation dialog box titled "Account manager Request" is now displayed in the center of the screen. The dialog box contains the text "The request is complete." and an "Ok" button. The "Ok" button is highlighted with a purple circle. The background modal is dimmed, and the "Cancel" and "Save" buttons at the bottom are still visible.

8

Wait for a system administrator to approve your account manager request. You will receive an email once it is approved or denied.

If the cost object is already in the system and has an account manager, they will also receive and may approve/decline management requests.

9

Once you are notified your request has been approved or if the cost object is already in PPMS, go to any core facility homepage in PPMS.

University of Nebraska System

IBB_UNMC

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

Home

Core facilities available in :

Search ...

Facilities available in University of Nebraska Medical Center:

- Institutional Biospecimen Bank (IBB_UNMC) details
- Spatial Profiling Hub (SPH_UNMC) details
- Tissue Sciences Facility (TSF_UNMC) details

Facilities available in University of Nebraska-Lincoln:

- Magnetic Resonance Imaging Facility (MRI_UNL) details

Restore Default Sections

+ Add a New Section to the Home Page

My Sessions

No sessions booked.

Current Projects

92 active projects

View all active projects

Training

My training requests

No current training requests.

Training sessions as participant

Orders - New

No new orders.

10 Click "**Group/Account Management**" tab.

This is where the groups and accounts you have management rights in PPMS will show.

The screenshot displays the PPMS for the Institutional Biospecimen Bank - IBB_UNMC interface. The navigation bar at the top includes links for Home, Order, Documents, Reports, Publications, Profile, and Logout. The 'Group/Account Management' tab is highlighted in the navigation bar. The main content area shows a 'Home' section with a 'Welcome Document' link. Below this, there is an 'Order a service or a consumable' section with a dropdown menu labeled 'Services/consumables available:' and an 'order' button. Further down, there are several sections: 'Report a Publication' with a 'Report a publication' button, 'Orders - New' with 'No new orders on this core.', 'Orders - Accepted', 'Quotes' with 'No new quotes on this core.', 'Financial account and authorization requests' with 'You do not have any pending requests.', and 'My Order History'.

11 Go to **Financial Account management** section.

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PPMS for the Institutional Biospecimen Bank - IBB_UNMC

[Home](#) [Order](#) [Documents](#) [Reports](#) [Publications](#) [Profile](#) [Logout](#)

Group/Account Management

Financial Account management

My managed accounts

account number	account type	author	start	end
	NU Internal (SAP)		no date	no date
	NU Internal (SAP)		no date	no date

Authorizations for sets of financial accounts

[show](#)

Financial transaction review

Review financial transactions related to the accounts you manage:

Financial transaction review

Invoices

none

Group and users

Group

- Default account number:
- change

12 The cost objects you are authorized to manage will appear under **My managed accounts**.

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PPMS for the Institutional Biospecimen Bank - IBB_UNMC

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Group/Account Management

Financial Account management

My managed accounts

account number	account type	author	start	end
	NU Internal (SAP)		no date	no date
	NU Internal (SAP)		no date	no date

Authorizations for sets of financial accounts

[show](#)

Financial transaction review

Review financial transactions related to the accounts you manage:

Financial transaction review

Invoices

none

Group and users

Group

- Default account number:
- change

13 Click the cost object you wish to view and manage.

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PPMS for the Institutional Biospecimen Bank - IBB_UNMC

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Group/Account Management

Financial Account management

My managed accounts

account number	account type	author	start	end
	NU Internal (SAP)		no date	no date
	NU Internal (SAP)		no date	no date

Authorizations for sets of financial accounts

show

Financial transaction review

Review financial transactions related to the accounts you manage:

Financial transaction review

Invoices

none

Group and users

Group

• Default account number:

change

14 On this page you can:

- View who is using the account (users, groups, and projects)
- View and edit managers of the account
- Remove or edit authorizations of the account
- Add authorizations of the account (this SOP)

[Home](#) [Order](#) [Documents](#) [Reports](#) [Publications](#) [Profile](#) [Logout](#)

Group/Account Management

Expiration date:
no expiration date [add one](#)

Active:
☒

Save

[Return to account management page](#)

Profiles (Users, Groups and Projects) using account :

Projects using account

Project name	Status
	approved
	approved

Users using account

User name	Status
	approved

Managers of account

[show](#)

Authorizations of account :

For	Priority	activation date	expiration date	made by	Comments		
group affiliation	5					edit	deactivate
group affiliation	5					edit	deactivate

Create a new authorization

Show authorizations history :
☐

Audit log - account

9

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Under the **Authorizations of account** section, you can view, edit, or deactivate the authorizations of the account

[Home](#) [Order](#) [Documents](#) [Reports](#) [Publications](#) [Profile](#) [Logout](#)

Group/Account Management

Name	Email	Made By	Made Date	
			Aug 20 2025	edit deactivate
			Sep 03 2025	edit deactivate
			Aug 22 2025	edit deactivate

Create a new Manager

Show description :
☐

Show managers history :
☐

Authorizations of account

For	Priority	activation date	expiration date	made by	Comments	
group affiliation	5					edit deactivate
group affiliation	5					edit deactivate

Create a new authorization

Show authorizations history :
☐

Audit log - account

show

 STRATOCORE PPMS release 20790 (RCS.2/ebfd)

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To authorize a User, Group, or Project to access the cost object, select **Create a new authorization**.

Home Book Order Request Documents Reports Publications Profile Logout

Group/Account Management

Users using account

User name	Status
-	approved

Managers of account

Name	Email	Made By	Made Date	
				edit deactivate

Create a new Manager

Show description :

☐

Show managers history :

☐

Authorizations of account

No active authorizations for this account

Create a new authorization

Show authorizations history :

☐

Audit log - account

[show](#)

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Select the type of entity you'd like to authorize the account for (User, Group, or Project) in the first dropdown menu.

The default selection is User, but you can change it based on what entity you want to have access to the cost object.

[Home](#) [Book Order](#) [Request Documents](#) [Reports](#) [Publications](#) [Profile](#) [Logout](#)

Group/Account Management

☐

Authorizations of account

No active authorizations for this account

Create a new authorization

Show authorizations history :
☐

Create a new authorization

Authorization for :
User
Please select a valid user from the list.

Select a user
Select user
filter

Priority
5 - default priority

(Priority applies when a ppms tracker is in use - the tracker will select the account with highest priority)

Start date
no start date [add one](#)

Expiration date
no expiration date [add one](#)

Comments

Save

Audit log - account 2377011110

[show](#)

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In this example, “Group” is selected as the entity. In the second dropdown (Select a group), you can choose the specific group you want to authorize. You may use the filter option on the right to search, or scroll through the list manually. Once you find the appropriate group, select it to authorize the cost object.

Note: If you are authorizing a user or a project instead, follow the same steps using the corresponding selection.

Home Book Order Request Documents Reports Publications Profile Logout

Group/Account Management

☐

Authorizations of account

No active authorizations for this account

Create a new authorization

Show authorizations history : ☐

Create a new authorization

Authorization for : Please select a valid group from the list.

Select a group filter

Priority

(Priority applies when a ppms tracker is in use - the tracker will select the account with highest priority)

Start date no start date [add one](#)

Expiration date no expiration date [add one](#)

Comments

Save

Audit log - account 2377011110

[show](#)

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Note for Priority: trackers are not currently used in NU's PPMS, so the default priority can remain selected. Once authorized, users, groups, or projects will be able to select this cost object when booking, ordering, or submitting requests with a core, as appropriate.

20

You may optionally specify a start date and an expiration date for this authorization.

Home Book Order Request Documents Reports Publications Profile Logout

Group/Account Management



Authorizations of account

No active authorizations for this account

Create a new authorization

Show authorizations history :



Create a new authorization

Authorization for :

Group

Please select a valid group from the list.

Select a group

Select group

filter

Priority

5 - default priority

(Priority applies when a ppms tracker is in use - the tracker will select the account with highest priority)

Start date

no start date [add one](#)



Expiration date

no expiration date [add one](#)



Comments

Save

Audit log - account

[show](#)

21 Click "Save"

Home Book Order Request Documents Reports Publications Profile Logout

Group/Account Management

No active authorizations for this account

[Create a new authorization](#)

Show authorizations history : ☐

Create a new authorization

Authorization for : Please select a valid group from the list.

Select a group [filter](#)

Priority

(Priority applies when a ppms tracker is in use - the tracker will select the account with highest priority)

Start date 

[delete](#)

Expiration date no expiration date [add one](#)

Comments

[Save](#)

Audit log - account

[show](#)

STRATOCORE PPMS release 21013 (RC9.2/427e)

22 The cost object is now authorized for the user, group, or project you selected. To make additional changes or manage the cost object further, return to steps 9–21.