

Financial account number in PPMS

08/11/2019

You need a financial account number to book the microscopes, this is usually a grant code or internal Imperial account and consists of the PI name who holds the grant, a **cost centre** (4 letter code for the department), an **activity code** (starting with a letter P, G, F, N followed by 5 numbers). **You need to ask your PI which account to use and get their authorisation as your microscope usage will be charged to this account.**

- 1) Select 'profile' tab and 'Change your default account number'

PPMS for the NHLI Facility for Imaging by Light Microscopy - FILM

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Group/Account Management

User profile

Login: jbruckba
Name: Bruckbauer Andreas
Phone:
Group: Magee, Tony
Email: a.bruckbauer@imperial.ac.uk
Cancel Reset Save changes

Financial Account Information

Default Financial Account Number: FILM

Change your default account number

Request authorization to use a financial account:
New account authorization request

- 2) Click into 'Please enter account number' field

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Group/Account Management

Request account number modification

Please enter the new account number :

submit account number modification request

- 3) Choose account type 'Grants P Accounts' or 'All other accounts'

Start typing in 'Select or create an account' field, e.g. your supervisors name or activity code PXXXXX

Select the account which your PI authorised you to use

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Account number request

Select an account type: All Other Accounts

Type description: Accounts with activity beginning with A, G, N, or I

Select or create an account: [Create a new account \(internal use only\)](#)

Cancel Save

4) save

The screenshot shows the 'Account number request' form. The 'Select an account type' dropdown is set to 'All Other Accounts'. The 'Select or create an account' dropdown is set to 'FILM-WHZZ-G07919-165138'. The 'Short description' field is empty. The 'Long description' field is empty. The 'Surname of PI' field is empty. The 'Film' field is empty. The 'Code/Format' field is empty. The 'Activity/Code/Format' field is empty. The 'Analysis/Code/Format' field is empty. The 'Save' button is highlighted in blue.

5) Click OK

The screenshot shows the 'Account number request' form with an 'Account Update Info' dialog box overlay. The dialog box contains the text: 'The account: FILM-WHZZ-G07919-165138 has been successfully selected. However, you still have to save the account modification.' The 'OK' button is highlighted in blue.

6) Submit account number modification request

The screenshot shows the 'Request account number modification' form. The 'Please enter the new account number' field is empty. The 'submit account number modification request' button is highlighted in blue.

If the account is not already listed in PPMS, you need to select 'create a new account'

The screenshot shows the 'Account authorization request' form. Under the 'Select or create an account' section, there is a link labeled 'Create a new account' which is circled in red. Below this section are 'Cancel' and 'Save' buttons.

You need to fill out the fields for **PI name, cost centre and activity code** and save your request.

This screenshot shows the 'Create a new account' section of the form. A red box highlights the following fields: 'New account number' (containing 'Magen-SPM27-CH321'), 'PI name' (containing 'Magen'), 'Cost centre' (containing 'SPM27'), and 'Activity code' (containing 'CH321'). Below these fields are 'Cancel' and 'Save' buttons.

The financial account request will go to approval, once it is approved, you will be able to book equipment.

If you need more than one account, you can select '**New account authorization request**' in your profile and add an additional account which can be selected when booking a microscope.

It is important that you have at least one default account, as this will be used when you exceed the booked time.