

UCLA Sequencing Core

Placing a TCGB Sequencing Core Order Using PPMS

Contents

1. <u>Introduction</u>	<u>2</u>
2. <u>Getting Started with PPMS</u>	<u>2</u>
3. <u>Beginning an Order</u>	<u>3</u>
4. <u>Completing an Order Form</u>	<u>4</u>
5. <u>After Order Submission</u>	<u>7</u>
6. <u>Tracking Order Status</u>	<u>7</u>

Placing a TCGB Sequencing Core Order Using PPMS

1. Introduction

PPMS is a web-based scheduling software designed for shared resource groups to manage their instruments and services. In the case of UCLA's sequencing cores, PPMS allows users the ability to create an account and submit requests for whichever type of sequencing service they need.

The below guide provides a step-by-step process of how a user can submit orders for services offered by UCLA's sequencing core TCGB.

2. Getting Started with PPMS

Before a user can begin using PPMS, they will need to create an account.

For instructions on how to create an account within PPMS, please use the guide "How To – Create an Account in PPMS" hosted [here](#).

Once the user's account creation request has been approved and they have logged into PPMS for the first time, they will see the PPMS **main landing page** (below).

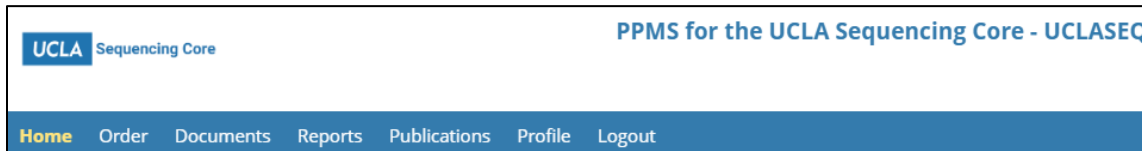
The screenshot shows the main landing page of the PPMS system for the UCLA Sequencing Core. At the top, there is a navigation bar with the following items: Home, Order, Documents, Reports, Publications, Profile, and Logout. Below the navigation bar, there is a yellow banner with the text "Test Public Doc" and a link "see details". The main content area is titled "Home" and includes the text "Current user: Hong Eunice (regular user view) restore administrator view". The primary action is a section titled "Order a service or a consumable:" which contains a dropdown menu labeled "Services/consumables available:" and an "order" button. Below this, there are several expandable panels: "Report a Publication" (with a "Report a publication" button), "Orders - New" (with the text "No new orders on this core."), "Orders - Accepted", and "Quotes".

Main PPMS landing page

The **main landing page** offers users the ability to customize which information they can see immediately upon logging in, such as active orders or available quotes.

Placing a TCGB Sequencing Core Order Using PPMS

More importantly, at the top of the main landing page is the **top navigation bar**, pictured below.



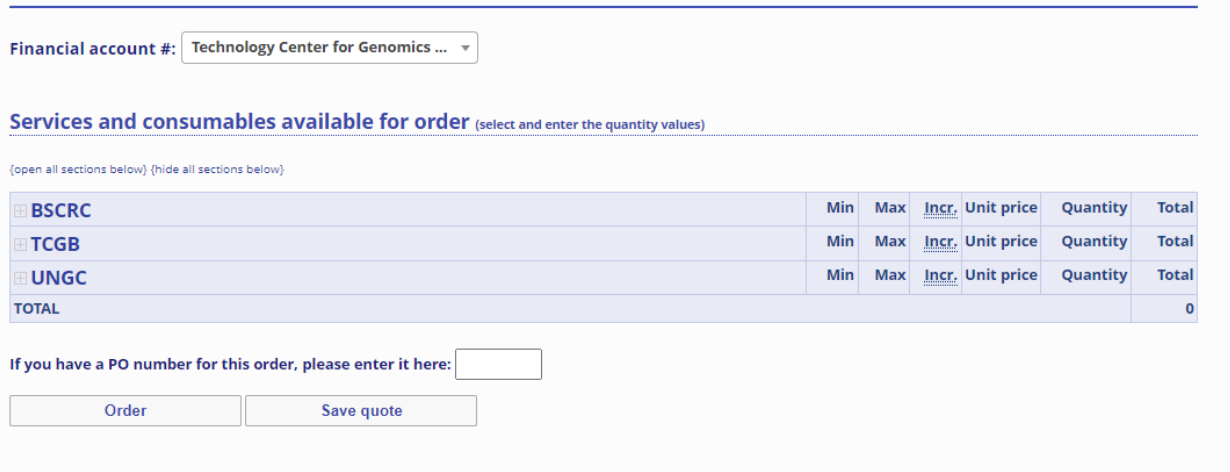
The **top navigation bar** is present on all pages within PPMS and is the main way to move between different areas of the site. For the purpose of this guide, we will be most concerned with the **Order button** present on the top navigation bar.

3. Beginning an Order with TCGB

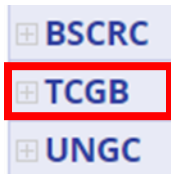
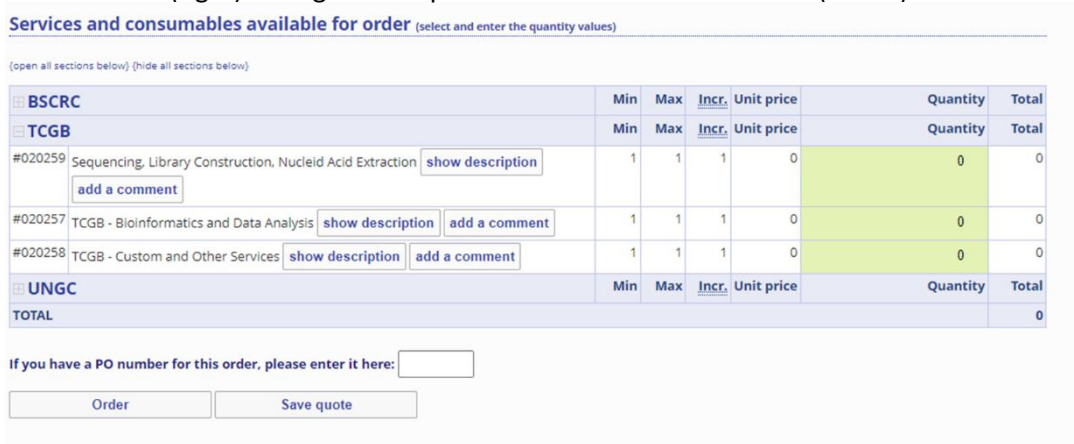
To begin an order, click on the **Order** button located on the top navigation bar (below).



This will open the **Order Service or Consumable** page, shown below.



To reveal services that can be ordered, click on the **plus icon** next to each of the individual sequencing core names (right). Doing so will open each individual core section (below).



Placing a TCGB Sequencing Core Order Using PPMS

With the core sections opened, multiple columns containing information will appear. There are only two pieces of information that are important: **the name of the service(s)** and the **quantity counter**. Both are outlined below.

TCGB		Min	Max	Incr.	Unit price	Quantity	Total
#020259	Sequencing, Library Construction, Nucleid Acid Extraction show description add a comment	1	1	1	0	0	0
#020257	TCGB - Bioinformatics and Data Analysis show description add a comment	1	1	1	0	0	0
#020258	TCGB - Custom and Other Services show description add a comment	1	1	1	0	0	0

The **name of the service** (indicated by the letter 'A' above) is a general label for a type of service provided by the core. It does not describe the specific sub-services that will be undertaken to fulfill the order. In the example above, the type of service the user is selecting is a sequencing run.

The **quantity counter** (letter 'B' above) is used by the user to communicate which service they would like ordered. To do this, a user will click the up arrow once on the quantity counter, increasing it from zero to one. Only one service should have a value of one before submitting.

Important Note: the value of the quantity counter cannot go above one and does not represent the number of samples or specific sub-services a user needs performed per order. This information will be provided to the core staff in the next step.

With the quantity counter at a value of one for the desired service, click the **Order** button at the bottom of the page to advance (outlined in red to the right)

TOTAL

If you have a PO number for this order, please enter it here:

4. Completing an Order Form – TCGB

After clicking the order button, a new window will open on top of the previous window containing the **order form**. The order form contains relevant information and instructions for the service being ordered.

Each order form will contain different questions and instructions based on the service selected. As certain questions or options are selected, the number and kind of questions may change, based on additional information that may be needed.

All required questions (denoted by a red asterisk) must be answered. Should there be any question about what information is being requested by the form, please contact the sequencing core staff.

Placing a TCGB Sequencing Core Order Using PPMS

Examples of what the order form window looks like can be found below.

Order form of TCGB - Sequencing, Library Construction, Nucleic Acid Extra.

TCGB - Nucleic Acid Extraction, QC, Library Preparation, Sequencing Request Form

This form is to be completed if you are requesting services provided by TCGB.

TCGB Email Address: sequencing@mednet.ucla.edu

Mailing Address:
650 Charles E Young Drive South, CH5 38-123
Los Angeles, CA 90095-1735
Phone: (310) 206-3945

WHAT YOU SHOULD KNOW:

A. Fill in information requested below for project creation. There are seven (7) sections in total. Fields marked with * are mandatory. Insert 'N/A' if it is not applicable to your request.

B. A Sample Manifest is required for each work order. Sample Drop will be scheduled after a completed "Sample Manifest Template for TCGB Service" has been submitted.

C. Sample Manifest could be submitted in tandem with or at any time after work order submission - that is, when a service quote is accepted and a make work order is submitted. TCGB will send you a quote for all the services identified for this project after the project request has been reviewed and accepted.

Whom should we contact if we have questions regarding this project request?

Name: *

Sequencing, Library Construction, Nucleic Acid Extraction Order Form

Order form of TCGB - Bioinformatics and Data Analysis

TCGB - Bioinformatics and Data Analysis Request Form

Previous answers:

SECTION 1. BIOINFORMATICS AND DATA ANALYSIS:

Bioinformatics and Data Analysis Requested (multiple choices allowed):

- Spatial Transcriptomics Analysis
- Single Cell Analysis
- NGS Partial Data Analysis - generate VCF (Variant Call Format) file
- NGS Full Data Analysis
- Other

SECTION 2. DATA DELIVERY OPTIONS:

- BCL files
- FASTQ files

Bioinformatic and Data Analysis Request Order Form

Order form of TCGB - Custom and Other Services

TCGB - Custom and Other Services Request Form

Previous answers:

This form is to be completed if you are requesting custom and other services provided by TCGB.

TCGB Email Address: sequencing@mednet.ucla.edu

Mailing Address:

650 Charles E Young Drive South, CHS 38-123
 Los Angeles, CA 90095-1735
 Phone: (310) 206-3945

WHAT YOU SHOULD KNOW:

A. Fill in information requested below for project creation. There are seven (2) sections in total. Fields marked with * are mandatory. Insert 'N/A' if it is not applicable to your request.

B. A Sample Manifest is required for each work order. Sample Drop will be scheduled after a completed "Sample Manifest Template for TCGB Service" has been submitted.

C. Sample Manifest could be submitted in tandem with or at any time after work order submission - that is, when a service quote is accepted and a make work order is submitted. TCGB will send you a quote for all the services identified for this project after the project request has been reviewed and accepted.

STRATOCORE PPM3 release 19/07 (6ec9)

Custom and Other Services Request Form

Once all required questions have been answered and all instructions followed, click the **Proceed Order** found at the bottom of the form.

Doing so will replace the order form with a pop-up window confirming that the order has been successfully submitted (below).


Order submitted

Your order #273 has been submitted.

Click the OK button to close the submission confirmation and be taken to the order reference page (below).

Order ref. #273

Order ref. #273					
Order for Williams Elijah, email: emwilliams@mednet.ucla.edu, phone: 6145314419 (Technology Center for Genomics & Bioinformatics (TCGB))					
Order made on 2024/05/20 at 14:31 by Williams Elijah					
Account number to use: Technology Center for Genomics Bioinformatics (TCGB) Change account					
This order is not attached to a project. Change project					
Order phase: P1 - Work Order Review					
Assigned to: nobody					
TCGB			Unit price	Quantity	Price
#020258 oid:273	TCGB - Custom and Other Services (service form)	show description	0.00	1	0.00
TOTALS				Quantity	Price
				1.00	0.00




Send a notification by email

Add a manifest

Placing a TCGB Sequencing Core Order Using PPMS

The **order reference** page displays all current information related to the submitted order. When a user needs to check on the status of an order or confirm information related to it, this is the page that will be accessed.

Order ref. #273					
Order for Williams Elijah, email: emwilliams@mednet.ucla.edu , phone: 6145314419 (Technology Center for Genomics & Bioinformatics (TCGB))					
Order made on 2024/05/20 at 14:31 by Williams Elijah					
Account number to use: Technology Center for Genomics Bioinformatics (TCGB) Change account					
This order is not attached to a project. Change project					
Order phase: P1 - Work Order Review A					
Assigned to: nobody					
TCGB		Unit price	Quantity	Price	
#020258 oid:273	TCGB - Custom and Other Services (service form) B	show description	0.00	1	0.00
TOTALS				Quantity	Price
				1.00	0.00
					

One of the most important pieces of information on this page is the current **order phase** (marked by the letter 'A' above). The order phase indicates where the order is in the workflow. This allows users to know the current progress of the order without needing to contact the core staff.

The submitted order form can be reviewed by the user by clicking the **service form** linked text (letter 'B' above)

5. After Order Submission– TCGB

Once the order has been submitted and accepted by the core, the core staff will begin work on completing the order. Additional communication may be received from the core depending on the core's workflow or if there are questions about the submitted order request.

Once the order has been completed, the core will notify the user and provide any deliverables related to the requested service. The exact nature of this notification and delivery may vary depending on the core and service selected. Any questions about final delivery should be directed to the staff of the core.

6. Tracking Order Status – TCGB

Navigate back to the order reference page to continue to track the submitted order's status. To do this, return to the main landing page by clicking the Home button on the top navigation bar (below)

Placing a TCGB Sequencing Core Order Using PPMS

Home

Order

Documents

Reports

Publications

Profile

Logout

Once on the main landing page, you will see three sections relating to orders (right).

The section **Orders - New** will list orders that are newly created but not yet accepted by the core.

Orders - Accepted will show all orders that are currently being worked on by the core(s). Orders shown in **My Order History** have completed.

To open the order reference page for any order, simply click on the order displayed in any of the above sections.

☰ [Orders - New](#)

| Order ref #273

☰ [Orders - Accepted](#)

☰ [Quotes](#)

| No new quotes on this core.

☰ [My Order History](#)