

User Guides for Group PI

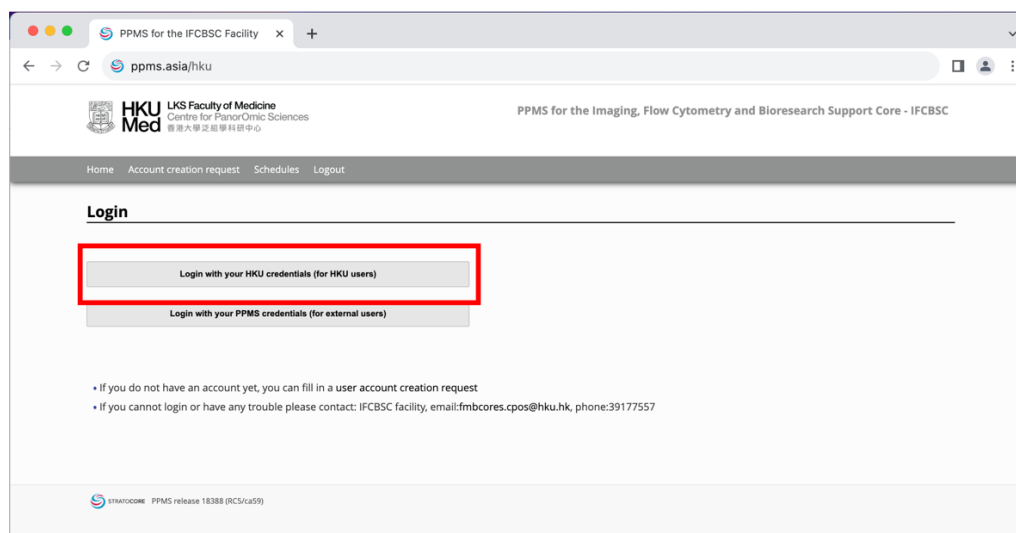
To access PPMS for instruments booking of HKU CPOS Laboratory block instruments, please visit the follow website:

<https://ppms.asia/hku>

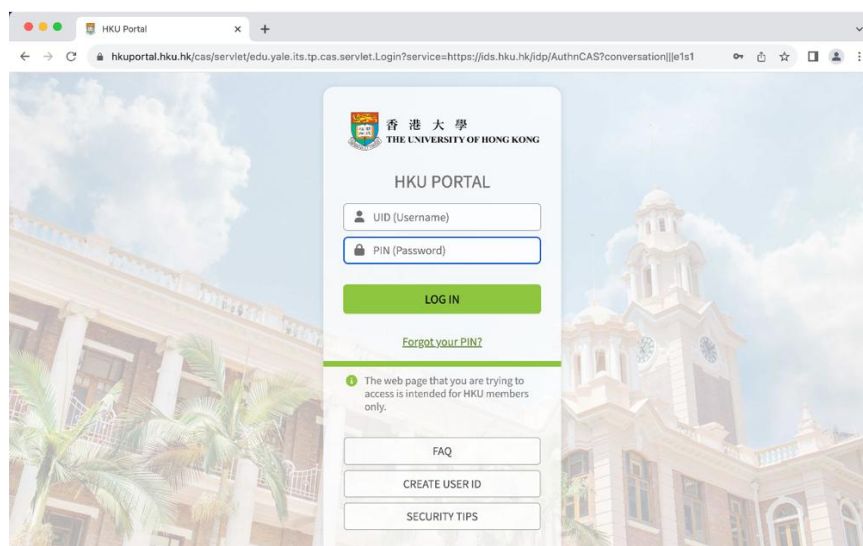
Accessing the account

Current PI:

For current HKU users of our facilities, please click “Login with your HKU credentials for HKU users”

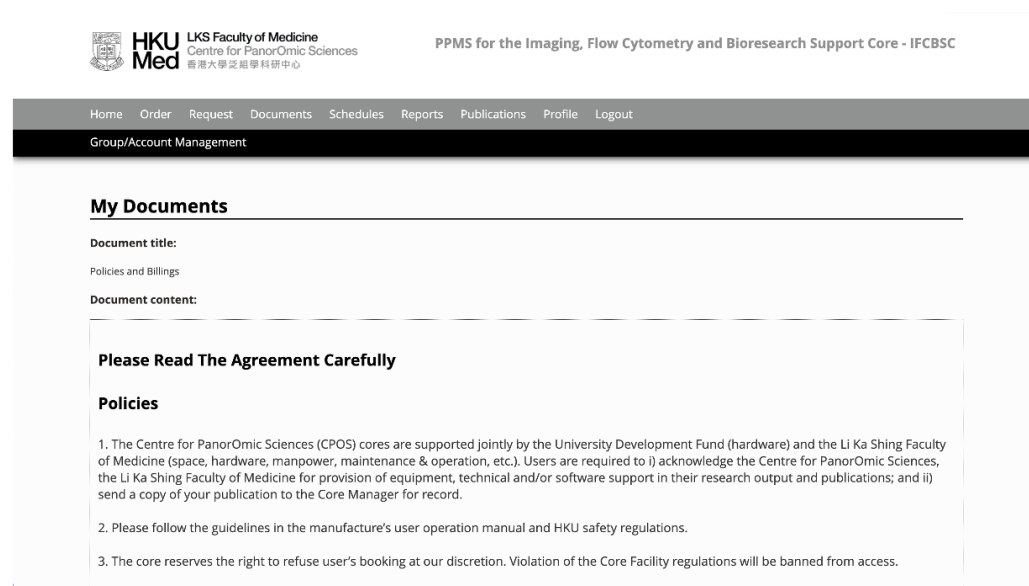


Login with your HKU portal



If you forgot your HKU portal password, please follow HKU ITS instruction to reset the password, DO NOT click the “follow these instructions” to attempt reset password.

Please read through and confirm on our “Policies and Billing agreement”.



The screenshot shows the HKU Med PPMS portal. The header includes the HKU Med logo, 'LKS Faculty of Medicine Centre for PanorOmic Sciences', and 'PPMS for the Imaging, Flow Cytometry and Bioresearch Support Core - IFCBSC'. The navigation bar has links: Home, Order, Request, Documents, Schedules, Reports, Publications, Profile, Logout. Below the navigation bar is a 'Group/Account Management' section. The main content area is titled 'My Documents' and shows a document titled 'Policies and Billings'. The document content is titled 'Please Read The Agreement Carefully' and lists three policies.

My Documents

Document title:
Policies and Billings

Document content:

Please Read The Agreement Carefully

Policies

1. The Centre for PanorOmic Sciences (CPOS) cores are supported jointly by the University Development Fund (hardware) and the Li Ka Shing Faculty of Medicine (space, hardware, manpower, maintenance & operation, etc.). Users are required to i) acknowledge the Centre for PanorOmic Sciences, the Li Ka Shing Faculty of Medicine for provision of equipment, technical and/or software support in their research output and publications; and ii) send a copy of your publication to the Core Manager for record.
2. Please follow the guidelines in the manufacture's user operation manual and HKU safety regulations.
3. The core reserves the right to refuse user's booking at our discretion. Violation of the Core Facility regulations will be banned from access.

New PI:

For new HKU PI, CPOS staff will create your account and group for you.
Please contact our staff at enquiry.cpos@hku.hk or call 2831-5500.

Email will be sent to your HKU portal email upon the completion of set up, please try to login to PPMS following the instructions in session “Current PI”.

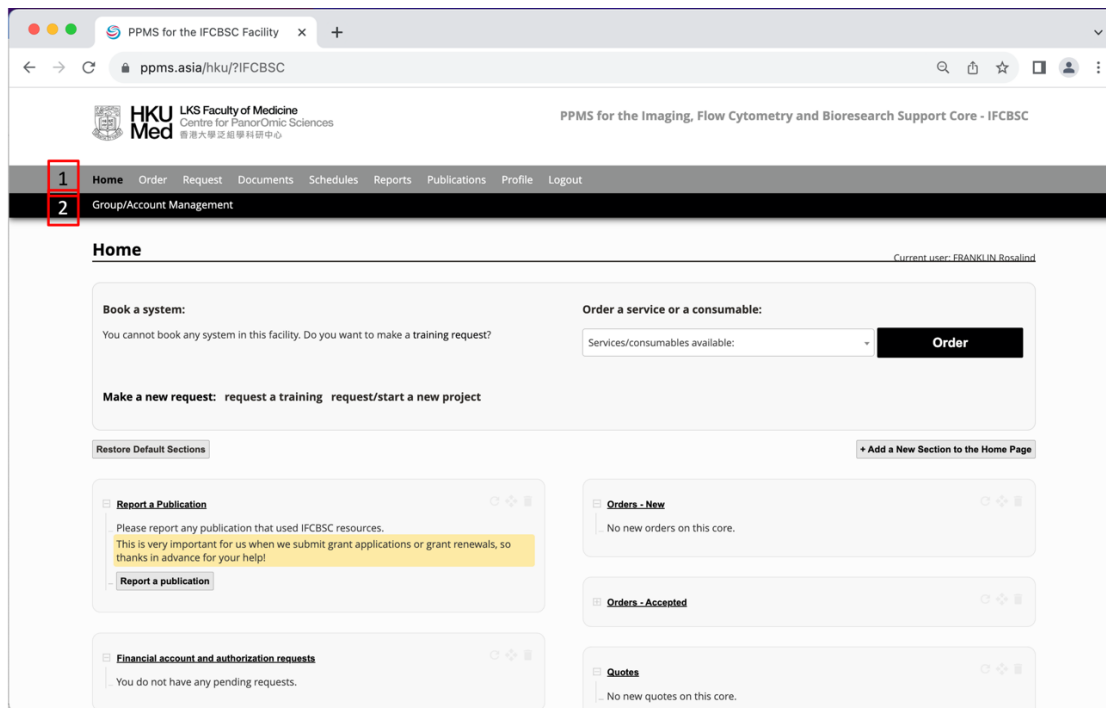
Please read through and confirm on our Policies and Billing agreement.



This screenshot is identical to the one above, showing the HKU Med PPMS portal with the 'My Documents' section and the 'Policies and Billings' document.

Navigating PPMS

Home page



Tabs on the Top Grey bar (1) are for daily instrument bookings, related consumables orderings, for details of the operations please refer to User Guide for User.

Tabs on the Lower Black bar (2) are only available for Group Manager/Financial account Manager. Group management functions can be found in the tab **“Group/ Account Management.”**

In “Group/ Account Management”

PPMS for the IFCBSC Facility

ppms.asia/hku/labrm/?pf=6

Home Order Request Documents Schedules Reports Publications Profile Logout

Group/Account Management

Financial Account management

My managed accounts

account number	account type	author	start	end
391775554-056136-22600-400-01	Internal		Jul 26 2023	Jul 30 2026

Authorizations for sets of financial accounts

show

Request authorization to manage a financial account:

New account management request

Invoices

Final invoices

- Invoice ref. PPMS6-IFCBSC-20250701, account number: 222222222-222222-22222-222-01

Group and users

Group "FRANKLIN_Rosalind" (FRANKLIN, Rosalind)

- Default account number: 391775554-056136-22600-400-01
- FRANKLIN Franky - charged on default account number change
- FRANKLIN Rosalind - charged on default account number change
- GOSLING Raymond - charged on default account number change
- YAM Bill - charged on default account number change

(1). My managed accounts shows all the accounts under your management in PPMS, please make sure the format follows the following format:

_____ - _____ - _____ - _____ - _____ (____)
 Project code Holder ID Centre Category (Dept ref, if needed)

Except for department ref, all others should be numerical value only.

Start date and End date of the financial/ grant account should also be listed.

Should you have any new accounts to add or remove, please contact our staff directly, DO NOT make any request via “New account management request”.

(2) Invoices will present you all the monthly invoices of the calendar month generated by CPOS staff via PPMS at the beginning of the following month with reference number:

Invoice ref. PPMS6-IFCBSC- Invoicing period cut-off date , account number

(3) Group and users, will indicate the default account for the group and all the users that are under your group.

To view invoice details, hovering the mouse onto one of the invoice reference “**Invoice ref. PPMS6-IFCBSC- Invoicing period cut-off date**” and click will direct you to that month’s invoice.

In the directed page, the booking session and order details, including the session number, users, system (Instrument), services or consumables, date, booking duration and usage duration (tracker time if system permits), and the overall amount.

PPMS for the IFCBSC Facility

ppms.asia/hku/invoice-details/?pf=6&invoiceid=PPMS6-IFCBSC-20230807--BP-DRAFT&bcode=391775554-056136-22600-4...

Home Order Request Documents Schedules Reports Publications Profile Logout

Group/Account Management

Invoice ref. PPMS6-IFCBSC-20230807--BP-DRAFT, details for account number 391775554-056136-22600-400-01

Financial account: 391775554-056136-22600-400-01 - HKU Med FRANKLIN Rosalind

[Export as a spreadsheet](#)

Invoice ref. PPMS6-IFCBSC-20230807--BP-DRAFT, details for account number 391775554-056136-22600-400-01 [Show more details](#)

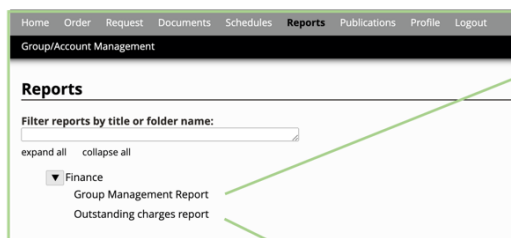
Session	User	System	Date	Start time	Duration (minutes booked)	Duration (minutes used)	Final amount
9462	GOSLING Raymond	ThermoFisher Qubit Fluorometer	01/08/2023	9:30	450	0	0.00
9467	GOSLING Raymond	ThermoFisher Qubit Fluorometer	03/08/2023	11:00	330	0	0.00
9468	GOSLING Raymond	ThermoFisher Qubit Fluorometer	04/08/2023	10:00	240	0	0.00
9469	GOSLING Raymond	ThermoFisher Qubit Fluorometer	05/08/2023	6:30	600	0	0.00
9470	GOSLING Raymond	ThermoFisher Qubit Fluorometer	06/08/2023	4:30	480	0	0.00
9454	GOSLING Raymond	Agilent Fragment Analyzer	06/08/2023	9:00	150	0	15.00
9457	GOSLING Raymond	Edinburgh Instrument FS5	06/08/2023	9:00	540	0	108.00
9471	GOSLING Raymond	Bio-Rad C1000 Touch Thermal Cycler	06/08/2023	11:00	180	0	0.00
9455	GOSLING Raymond	Agilent Fragment Analyzer	06/08/2023	12:30	120	0	12.00
9456	GOSLING Raymond	Agilent Fragment Analyzer	06/08/2023	15:30	120	0	12.00
Summary							
Total charged for autonomous use *(after fees, rebates & subsidies applied)							147.00
Total amount charged*							147.00

(*) rebates, fees & subsidies, when present, are already included in the final amount.

[Export as a spreadsheet](#)

[Accept this draft invoice](#)

Checking of staffs/ students booking sessions/ consumables/ services



Group Management Report

Report that shows the details of invoices for Group Managers

startdate: 2023-07-10

enddate: 2023-08-10

Run/refresh report

Show

▼

 entries Clear All Filters Select Current Page Unselect All Expand Size To Fit AutoSize Export Selection Export Filter...

id	Resource	User	Group	Pre...	Affiliation	Date booked
I-FCBSC-20230811--BP-DRAFT 9457	Session - Bioresearch - Analytical Edinburgh Instrument F55	GOSLING Raymond	FRANKLIN_Rosalind	HKU_Med	06/08/2023 09:00	
I-FCBSC-20230811--BP-DRAFT 9456	Session - Bioresearch - Analytical Agilent Fragment Analyzer	GOSLING Raymond	FRANKLIN_Rosalind	HKU_Med	06/08/2023 15:30	
I-FCBSC-20230811--BP-DRAFT 9455	Session - Bioresearch - Analytical Agilent Fragment Analyzer	GOSLING Raymond	FRANKLIN_Rosalind	HKU_Med	06/08/2023 12:30	
I-FCBSC-20230811--BP-DRAFT 9454	Session - Bioresearch - Analytical Agilent Fragment Analyzer	GOSLING Raymond	FRANKLIN_Rosalind	HKU_Med	06/08/2023 09:00	
I-FCBSC-20230811--BP-DRAFT 9256	Session - Bioresearch - Analytical Agilent Fragment Analyzer	YAM Bill	FRANKLIN_Rosalind	HKU_Med	02/08/2023 12:30	
I-FCBSC-20230811--BP-DRAFT 7766	Session - Bioresearch - Analytical Waters AutoPurification LCMS YAM Bill	FRANKLIN_Rosalind	FRANKLIN_Rosalind	HKU_Med	13/07/2023 18:00:2	
I-FCBSC-20230811--BP-DRAFT 7654	Session - Bioresearch - Analytical Waters AutoPurification LCMS YAM Bill	FRANKLIN_Rosalind	FRANKLIN_Rosalind	HKU_Med	13/07/2023 09:00:1	
I-FCBSC-20230811--BP-DRAFT 7653	Session - Bioresearch - Analytical Waters AutoPurification LCMS YAM Bill	FRANKLIN_Rosalind	FRANKLIN_Rosalind	HKU_Med	13/07/2023 09:00:1	

Group Management Report shows the drafted invoice or invoiced sessions/ services/ consumables

Outstanding charges Report shows the not yet invoiced sessions/ services/ consumables

Outstanding charges report

List details of the non-invoiced bookings/trainings/orders between a given period for Group Managers only.

startdate: 2023-07-10
enddate: 2023-08-10

Run/refresh report

Show entries Clear All Filters Select Current Page Unselect All Expand Size To Fit AutoSize Export Selection Export Filter...

Coren...	System/Service	Ref (se...)	Start date	Start time	End date	End time	Type	User	Account
<input type="checkbox"/>	Waters LCMS - LCMS vial cap without slit	295	08/08/2023	00:07:17	08/08/2023	00:24:39	Service and Consumable Orders	FRANKLIN_Rosalind	391775
<input type="checkbox"/>	Technical Support (0.5hr) -- Bioresearch	287	06/08/2023	01:23:46			Service and Consumable Orders	GOSLING Raymond	391775
<input type="checkbox"/>	Technical Support (0.5hr) -- Bioresearch	288	06/08/2023	01:29:27	06/08/2023	20:52:44	Service and Consumable Orders	GOSLING Raymond	391775
<input type="checkbox"/>								GOSLING Raymond SUM	

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At Report tab, there is the Group Management Report and Outstanding Charges Report.

In Group Management Report, it will list out all booking session, consumables and services that are included in a drafted invoice or an invoice.

In the Outstanding Charges Report, it will list out all booking session, consumables and services that are not yet included in any invoice.

Invoices are prepared monthly, so for past month's activities, please go to Group Management Report, while activities in current month will be in Outstanding Charges Report.

Adding and Removing Users in group

PPMS does not allow PI to actively add or remove users within group. During new user account set up, they will be able to select their PI group, this process will be validated by CPOS admin. We request the new user to send us an email asking to join the PI group and cc the PI for consensus, PI please reply to the email loop to confirm. Please let us know if the user does not belong to your group.

Likewise, during the departure of your staffs/ students, please email us the full name and the HKU portal email of the leaving staff/ students to enquiry.cpos@hku.hk, so we can remove the user from your group. Users who remain in HKU with access to the portal system will still be able to log in PPMS and by default will be charging to the previous settings.

Updating Financial accounts

All financial accounts can only be updated by admin, please notify our staff to update any financial accounts whenever they are approaching expiry date or about to reach deficit in advance. As expired account cannot be used for instrument booking, group members will not be able to make any bookings.

To update financial accounts, please email the **new financial account code** and the **expiry date** to enquiry.cpos@hku.hk

Please make sure the format follows the following format:

------()
Project code Holder ID Centre Category (Dept ref, if needed)
Except for department ref, all others should be numerical value only.