User Guides for Group PI

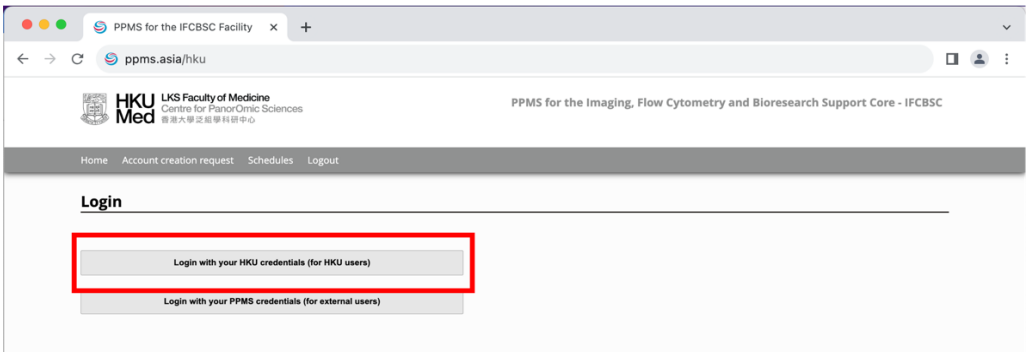
To access PPMS for instruments and service booking of HKU CPOS Imaging and Flow Cytometry Core and Bioresearch Support Core, please visit the follow website:

https://ppms.asia/hku

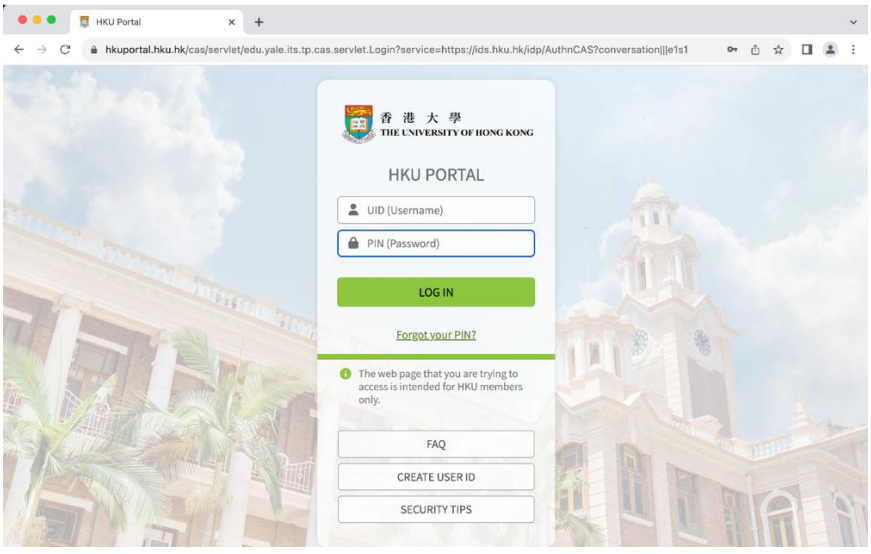
Accessing the account

Current PI:

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

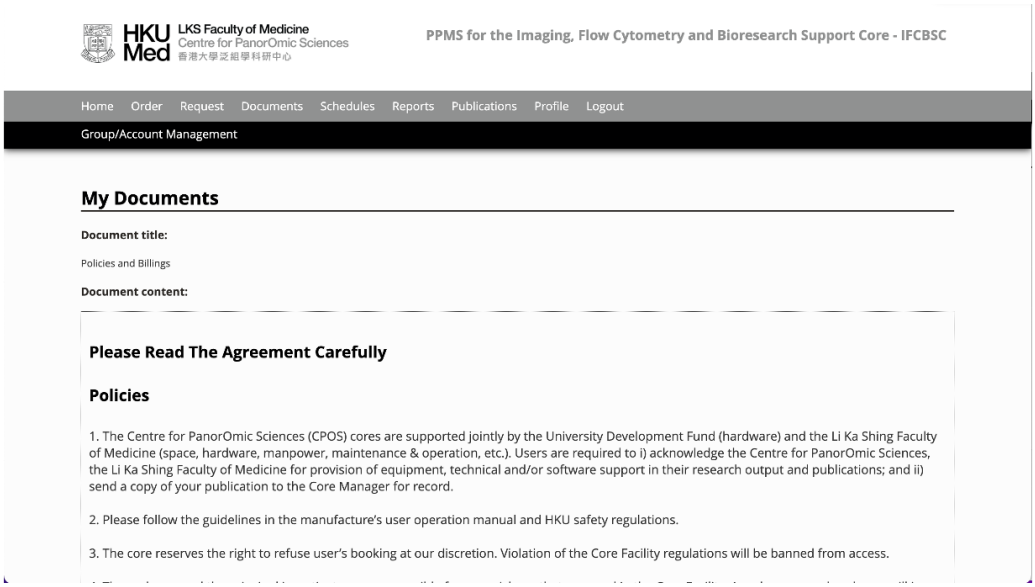


Login with your HKU portal



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”.



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 2185-5050.

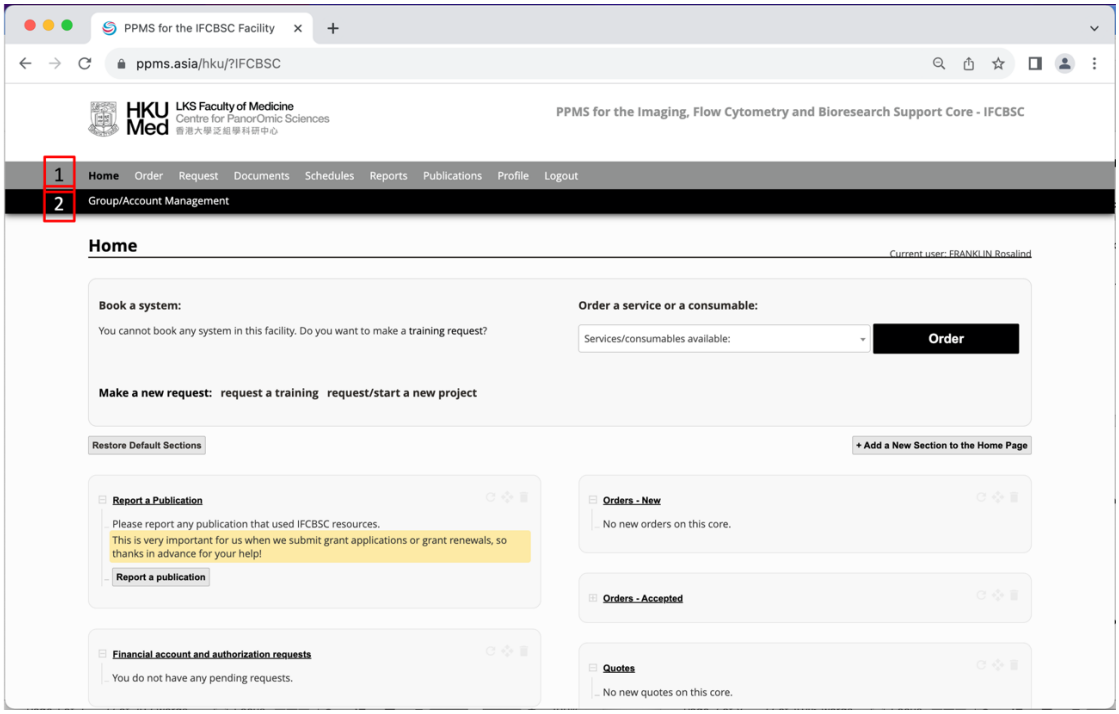
Email will be sent to your HKU portal email upon the completion of set up, please try to login to PPMS following the instructions in session “Current PI”.

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



Navigating PPMS

Home page

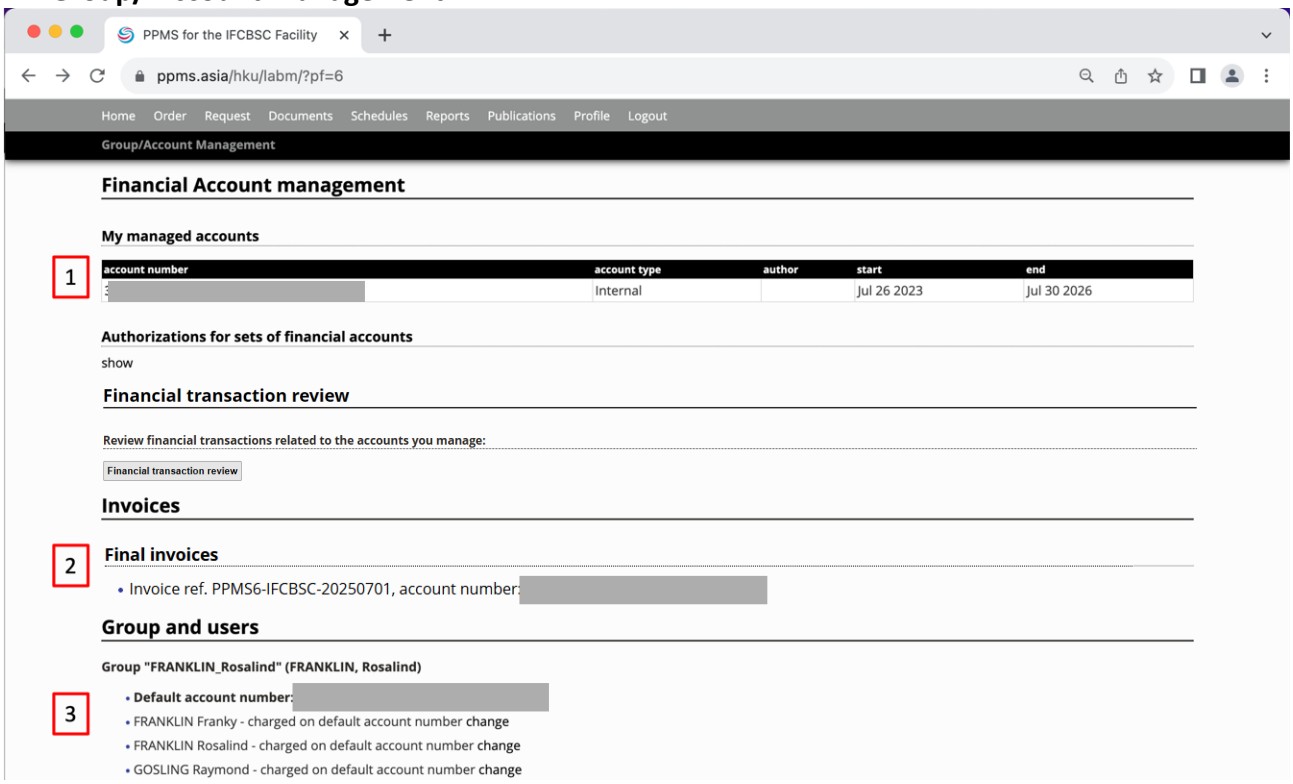


Tabs on the Top Grey bar (1) are for daily instrument bookings, related consumables orderings, for details of the operations please refer to User Guide for User.

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."**

The Principal Investigator may assign Group Manager(s) to manage the group in PPMS. For assistance, please contact our staff at enquiry.cpos@hku.hk or call 2185-5050.

In “Group/ Account Management”



(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.

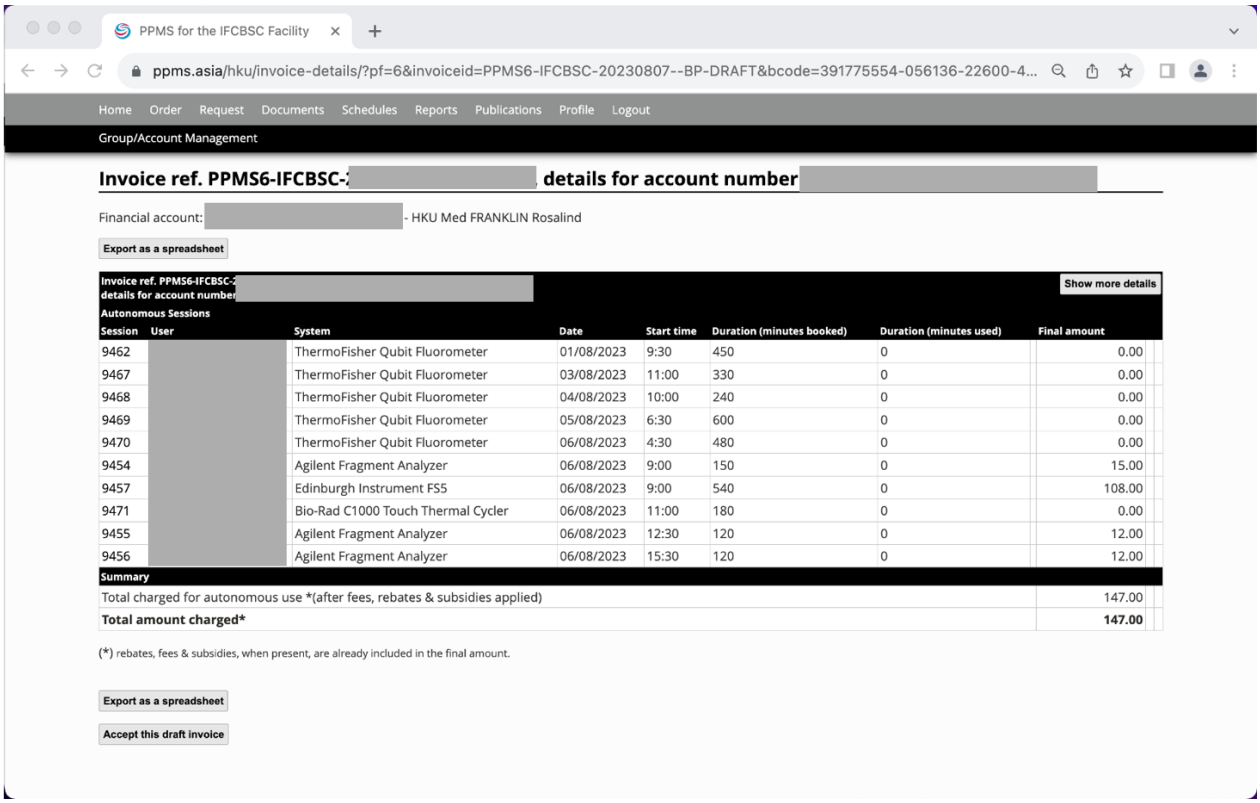
Should you have any new accounts to add or remove, please contact our staff directly, DO NOT make any request via “New account management request”.

(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.

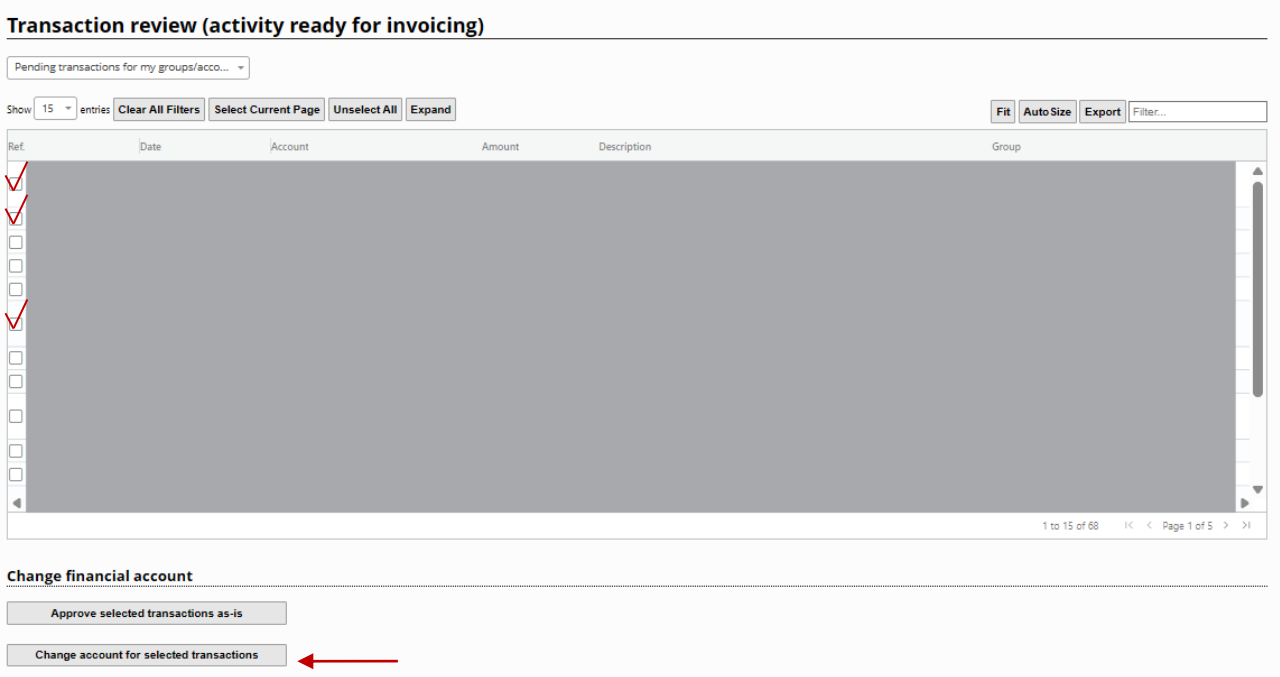
To view invoice details, hovering the mouse onto one of the invoice reference **"Invoice ref. PPMS6-IFCBSC- Invoicing period cut-off date"** and click will direct you to that month's invoice.
In the directed page, the booking session and order details, including the session number, users, system (Instrument), services or consumables, date, booking duration and usage duration (tracker time if system permits), and the overall amount.



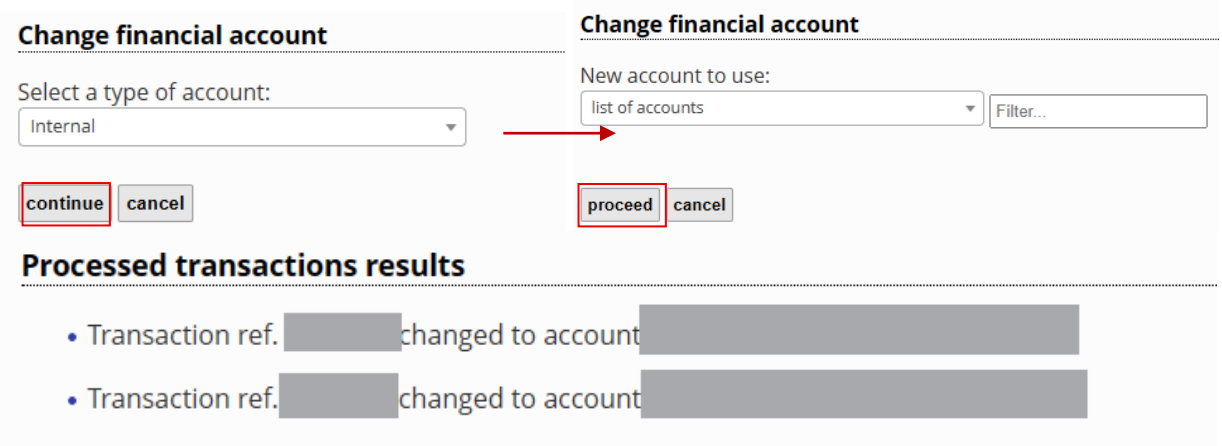
Financial Transaction Review



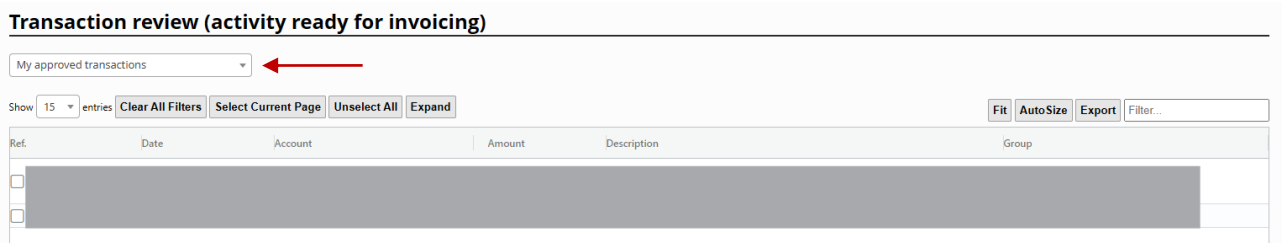
The Financial Transaction Review tab allows account managers to review and manage the selection of financial accounts for the ready for invoicing transactions.



To change account for designated transactions, check the boxes next to the transaction lines.
Click **Change account for selected transactions**.

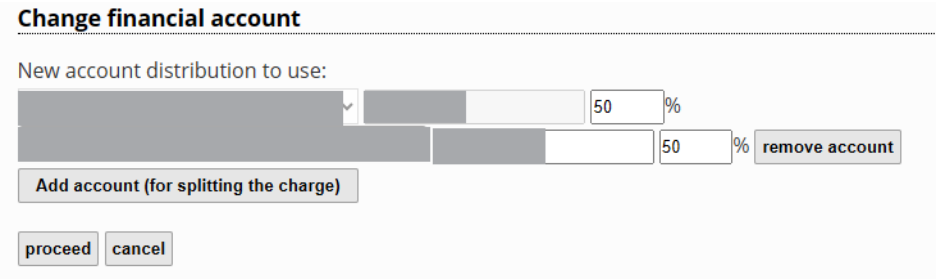


Select **Internal** for type of account and click **continue**.
Select the designated account from list of accounts dropdown list.
Click **proceed** to complete the action.
You can only choose from accounts that have been previously submitted to CPOS.
If the desired account does not appear in the dropdown list, please contact CPOS staff at enquiry.cpos@hku.hk to have the financial account added to your group in PPMS.



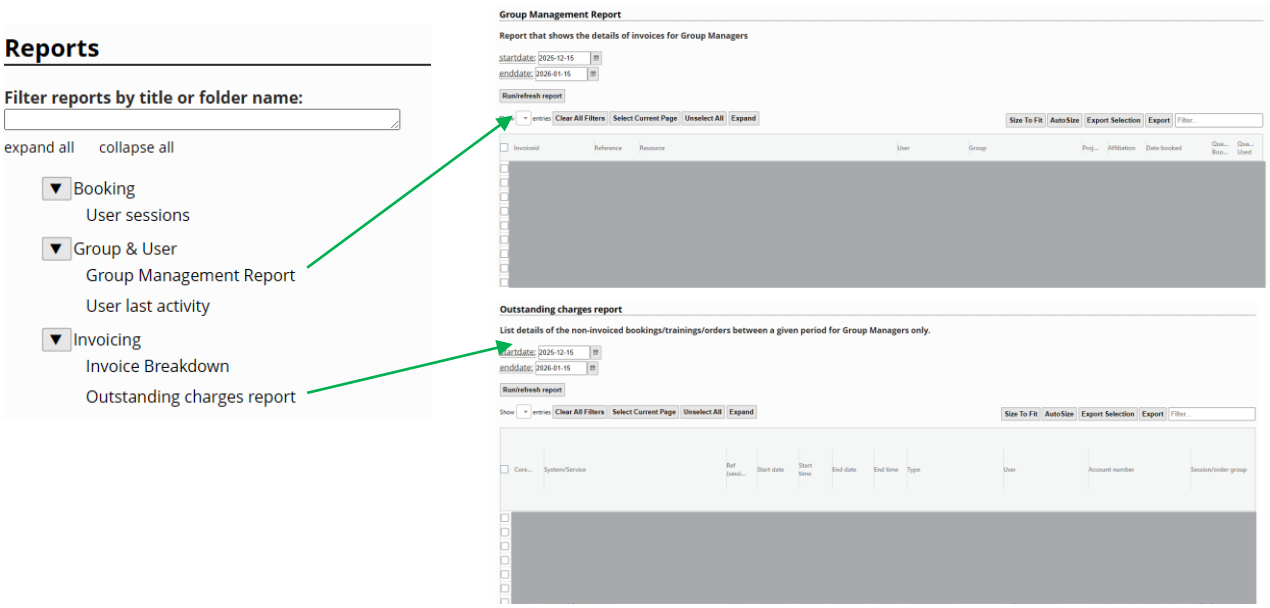
You may review the processed transaction results under **My approved transaction** which could be selected from the dropdown menu.

Split the bill across multiple accounts (Optional)



You may split the charges across multiple accounts for the selected transaction by clicking **Add account (for splitting the charge)**.
Enter the proportion of charges for the selected accounts.
Click **proceed** to complete the action.

Checking of staffs/ students booking sessions/ consumables/ services



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. The new user is required 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, when your staff or students depart, please email us their full name and HKU Portal email at enquiry.cpos@hku.hk so that we can deactivate their user account or transfer them from your group to their new group. Users who remain at HKU and continue to have access to the Portal system will still be able to log in to PPMS, and by default their charges will follow the previous group settings.

The Principal Investigator may assign Group Manager(s) to manage the group members in PPMS. For assistance, please contact our staff at enquiry.cpos@hku.hk or call 2185-5050.

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.

The Principal Investigator may assign Group Manager(s) to manage the group financial account in PPMS. For assistance, please contact our staff at enquiry.cpos@hku.hk or call 2185-5050.