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"
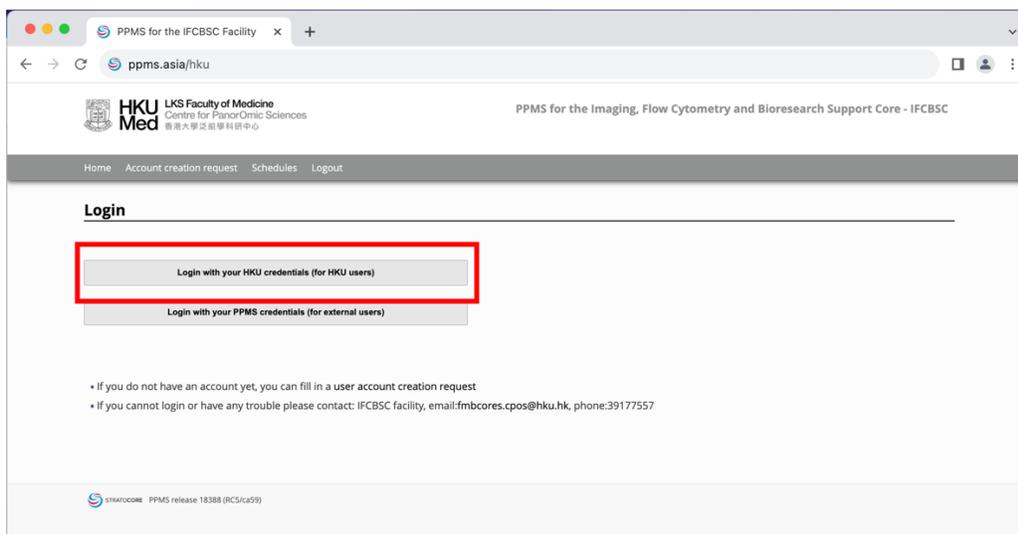
login with your HKU portal
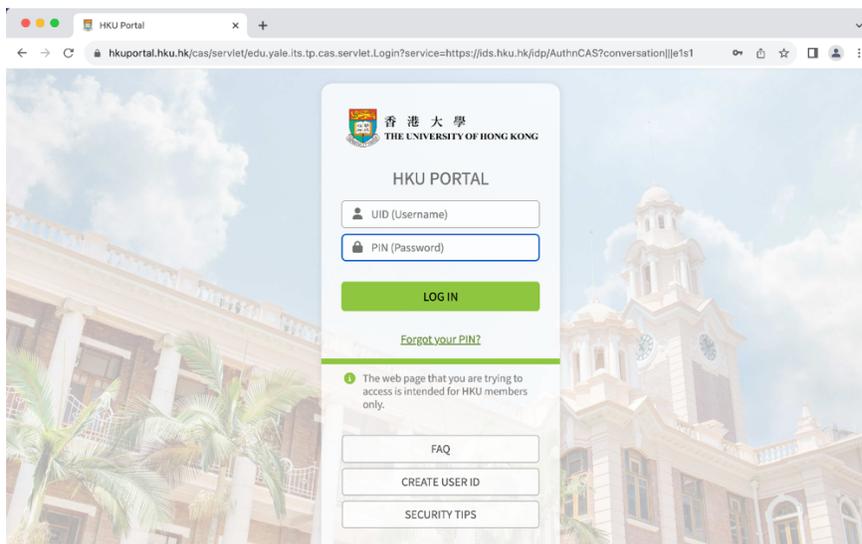
If the account is not available, please contact our staff at fmbcores.cpos@hku.hk or call 39177557.

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 submit the following information via email to fmbcores.cpos@hku.hk

Full name: eg. Patrick MANSON (last name full capitalized)
Telephone:
Email: only allow HKU portal email, no alias HKU email or other non-HKU emails
Financial/ Grant account: please follow 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.
Department:
Group administrative/ financial contact name:*.
Group administrative/ financial contact email:*.
Group administrative/ financial contact phone:*.
*The group administrative/ financial contact person must have set up his/her account already

Email will be sent to your HKU portal email upon the completion of set up, please try to login to PPMS as current PI

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

Navigating PPMS
Home page
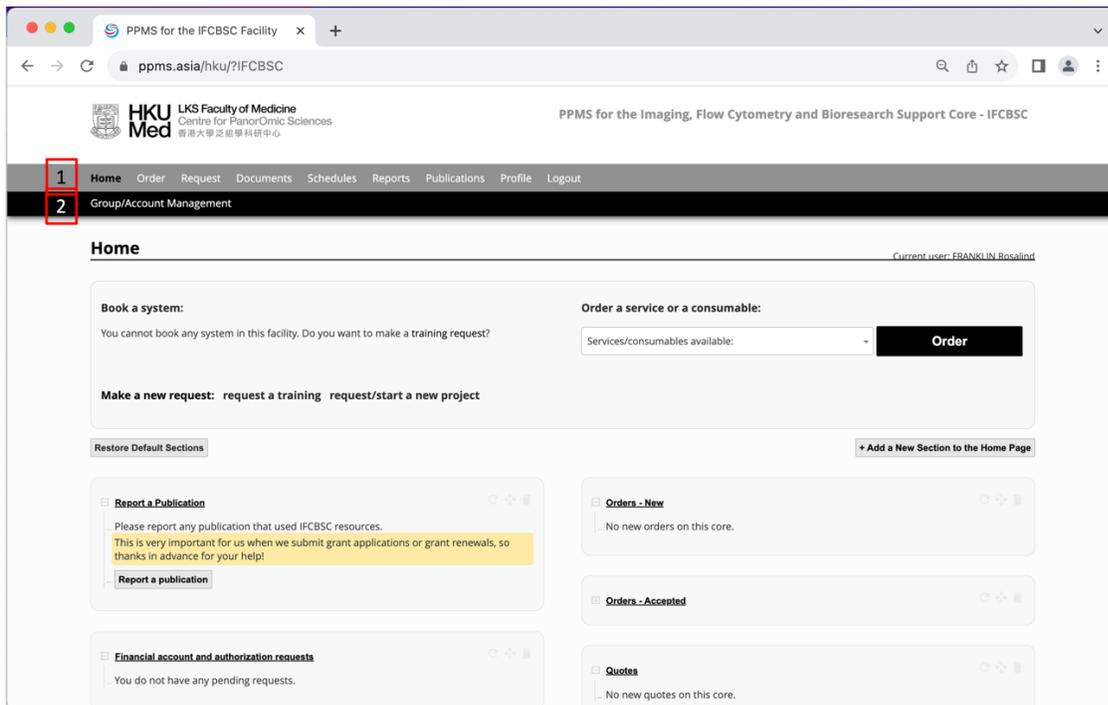
Tabs on the Top Grey bar (1) are for daily instrument bookings, related consumables orderings, for details of the operations please refer to the video for regular users.

Tabs on the Lower Black bar (2) are only available for PI or Group administrative/ financial contact. Main group management will be handled in the tab "Group/ Account Management."

In "Group/ Account Management"

(1). My managed accounts shows all the account 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 draft invoice generated by CPOS staff via PPMS at the end of each calendar month. 4 drafted Invoice will be created each month:
Invoice ref. PPMS6-IFCBSC- DATE –**BP**-DRAFT, account number = Bioresearch support
Invoice ref. PPMS6-IFCBSC- DATE –**FC**-DRAFT, account number = Flow Cytometry
Invoice ref. PPMS6-IFCBSC- DATE –**IG**-DRAFT, account number = Imaging
Invoice ref. PPMS6-IFCBSC- DATE -DRAFT, account number = All charging on consumables, trainings and technical supports.

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

For Draft Invoice, hovering the mouse onto the "Invoice ref. PPMS6 -IFCBSC- DATE ..... DRAFT" and click will direct you to that month's draft invoice. In the directed page, will list the booking session details, including the session number, which users, which system (Instrument), date, booking duration and usage duration (tracker time if system permits) and the overall amount.

PI are advice to check and if no problem, please press "Accept this draft invoice" or contact our staff for any problem.

In Group and users, should you want to make any changes to the default financial/ grant account or other financial/ grant accounts, please contact our staff.

If you wish to assign allow certain users in your group to have access to a particular existing account, you can do so by clicking edit next to the username. Click on the empty space to trigger the pop-up screen, and type in your staff ID or grant account numbers, click save and proceed on.

Checking of staffs/ students booking sessions/ consumables/ services

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

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

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 will send an email to user, and PI as confirmation. 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 fmbcores.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 update any financial accounts whenever they are approaching expiry date or about to reach deficit. As expired account cannot be used for instrument booking, therefore users of that group will not be able to make any bookings. 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 included.