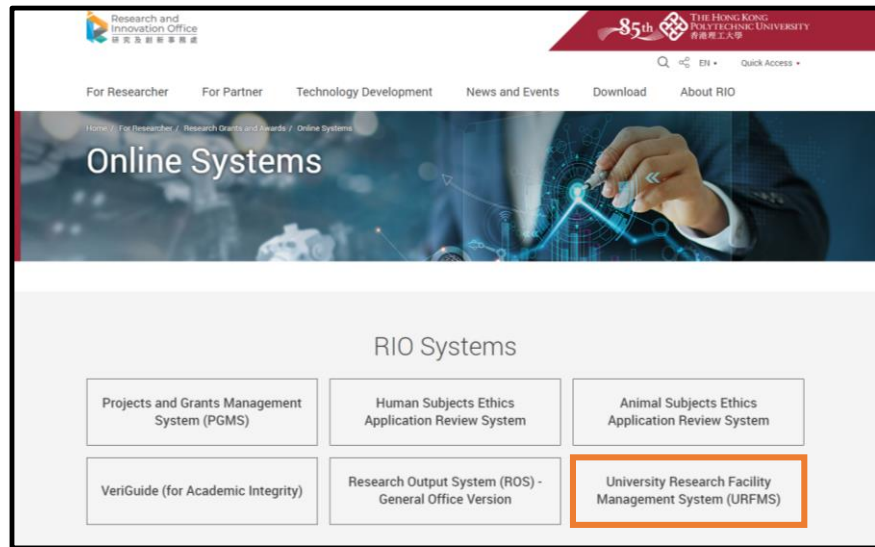


# University Research Facility Management System (URFMS) Quick Guide For ULS Supervisor

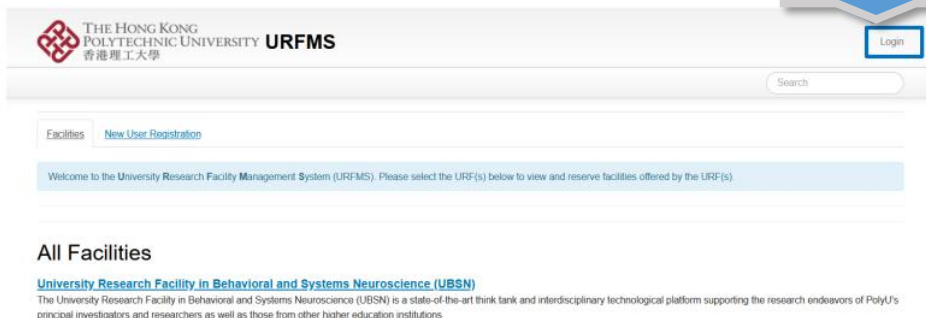
April 2022

- The **URFMS** can be accessed via the following paths:
  1. Go to: <https://urfms.polyu.edu.hk/>
  2. Go to relevant URF's website for “(Equipment) Booking”
  3. Go to the RIO website (<https://www.polyu.edu.hk/rio>)  
(For Researcher → Online Systems)



# System login

Click <Login>

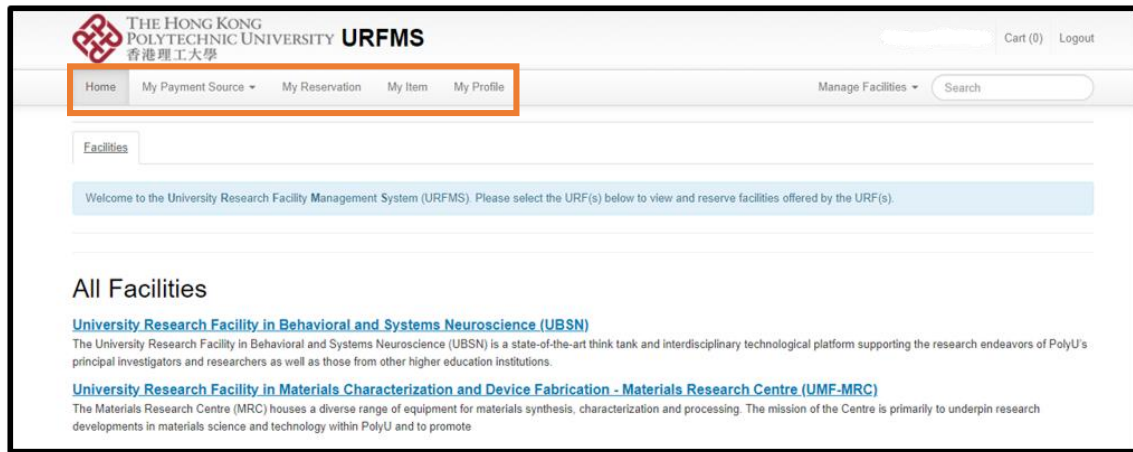


The screenshot shows the top of the URFMS website. At the top left is the logo for The Hong Kong Polytechnic University URFMS. To the right is a 'Login' button. Below the header is a search bar. A navigation bar contains 'Facilities' and 'New User Registration'. A welcome message states: 'Welcome to the University Research Facility Management System (URFMS). Please select the URF(s) below to view and reserve facilities offered by the URF(s)'. Below this is a section titled 'All Facilities' with a link to 'University Research Facility in Behavioral and Systems Neuroscience (UBSN)'. A paragraph follows: 'The University Research Facility in Behavioral and Systems Neuroscience (UBSN) is a state-of-the-art think tank and interdisciplinary technological platform supporting the research endeavors of PolyU's principal investigators and researchers as well as those from other higher education institutions'.



This section shows a login form for NetID and NetPassword. A speech bubble from the left points to the form with the text: 'Enter your NetID and NetPassword and then click <Sign in>'. The form includes the URFMS logo, the text 'Sign in with your NetID and NetPassword', two input fields for 'NetID' and 'NetPassword', a checkbox for 'Keep me signed in', a red 'Sign in' button, and a link for 'Forgot Your NetPassword?'. The background of the form area is a photograph of a modern building with a large, stylized sculpture.

# Main Menu



## My Payment Sources:

You can check your available payment source(s) with its transaction history.

For PIs, you can manage your payment source(s) (e.g. top-up/ release money to your payment source(s), add user(s) to use payment source(s) and allocate quota for each added user to the payment source(s))

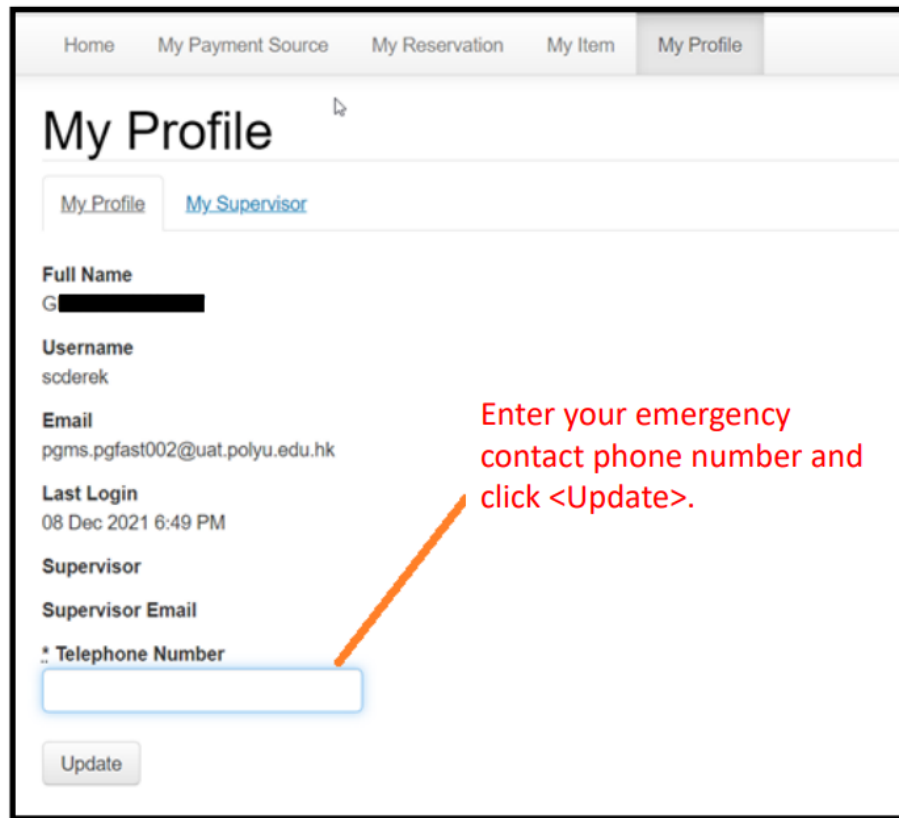
**Please note that ULS users need to choose a virtual ULS cheque account (ULS-ABCT-TAIMANCHAN-001) instead of a true account for reservation**

**My Reservations:** You can check your reservation history for equipment

**My Items:** You can check your item(s) purchased

**My Profile:** You can check your personal information (e.g. supervisor information) and update your emergency contact

# My Profile



The screenshot shows a web interface for a user's profile. At the top is a navigation bar with links: Home, My Payment Source, My Reservation, My Item, and My Profile (which is highlighted). Below the navigation bar is the title 'My Profile'. Underneath the title are two tabs: 'My Profile' and 'My Supervisor'. The main content area displays the following information:

- Full Name:** G [REDACTED]
- Username:** scderek
- Email:** pgms.pgfast002@uat.polyu.edu.hk
- Last Login:** 08 Dec 2021 6:49 PM
- Supervisor:**
- Supervisor Email:**
- \* Telephone Number:** [Empty input field]

At the bottom left is an 'Update' button. A red annotation with the text 'Enter your emergency contact phone number and click <Update>' and an orange arrow points to the 'Telephone Number' input field.

# My Supervisor

**THE HONG KONG POLYTECHNIC UNIVERSITY URFMS**  
香港理工大學

Home My Payment Source My Reservation My Item My Profile Search

## Request Endorsements

[My Profile](#) [My Supervisor](#)

Success, supervisor endorsement request sent.

### Search Supervisor

\*Supervisor's First name, Last name, NetID, or username:

\*Dept:

	Full Name	NetID	Email	Department
<a href="#">Request</a>	SZUH GN154E40	pgama001	pgms.pgama001@vat.polyu.edu.hk	AMA

### Supervisor Approval History

Ref. No.	Supervisor	Request date	Status	
25	pgama001	08 Dec 2021 6:56 PM	In Progress	<a href="#">Remove</a>

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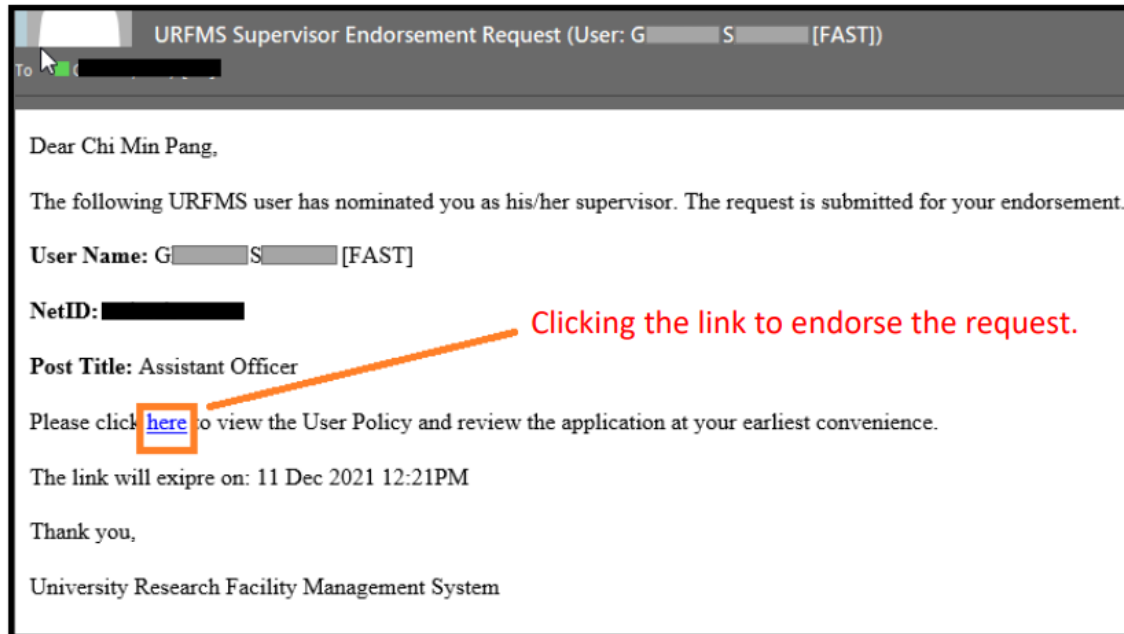
Select your supervisor as appropriate and click <Request> to seek endorsement from your supervisor.

### Important Note:

Only non-academic staff and students are required to seek for supervisor endorsement.

# Supervisor Endorsement

- After a user submitted a request to his/her supervisor for endorsement, the supervisor would receive the following email with hyperlink for endorsement of the request within 48 hours.



# Supervisor Endorsement

- Supervisor is required to view and agree the following Terms and Conditions for each request from user and ensure that user abides all rules and/or conditions as stipulated in each University Research Facility's User Policy

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香港理工大學

Login

Search

1. The supervisor is liable to the cost for equipment/platform usage, overtime usage, no-show penalty, training, consumables, technical support, repairing and/or replacement of damaged equipment resulted from misuse by the users.
2. The supervisor is responsible for informing the user of the university and/or departmental safety policies, as well as the potential hazards and safety precautions about each experiment.
3. The supervisor should ensure that the user abides by all rules and/or conditions as stipulated in the User Policy of each facility on URFMS.
4. The facilities on URFMS reserve the rights to amend their respective Terms & Conditions when deemed necessary.

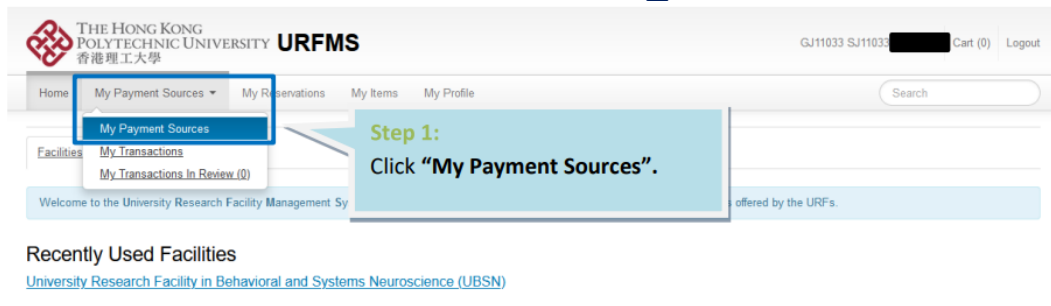
☐ I agree to the above and grant the approval to the user for using URFMS

Agree Decline

Check this box and click <Agree> to accept the Terms and Conditions for supervisor endorsement.



# Grant Right to Other Users to Use My Payment Source for Bookings



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Home My Payment Sources My Reservations My Items My Profile Search

My Payment Sources

My Transactions

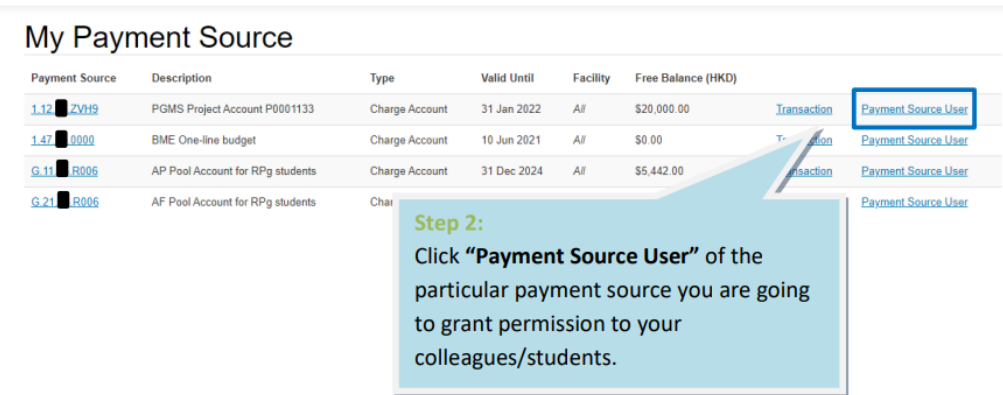
My Transactions in Review (0)

Welcome to the University Research Facility Management System

Recently Used Facilities

[University Research Facility in Behavioral and Systems Neuroscience \(UBSN\)](#)

A list of payment sources owned by you will be shown.



### My Payment Source

Payment Source	Description	Type	Valid Until	Facility	Free Balance (HKD)	Transaction	Payment Source User
<a href="#">1.12</a> <a href="#">R000</a>	PGMS Project Account P0001133	Charge Account	31 Jan 2022	All	\$20,000.00	<a href="#">Transaction</a>	<a href="#">Payment Source User</a>
<a href="#">1.47</a> <a href="#">R000</a>	BME One-line budget	Charge Account	10 Jun 2021	All	\$0.00	<a href="#">Transaction</a>	<a href="#">Payment Source User</a>
<a href="#">G.11</a> <a href="#">R006</a>	AP Pool Account for RPg students	Charge Account	31 Dec 2024	All	\$5,442.00	<a href="#">Transaction</a>	<a href="#">Payment Source User</a>
<a href="#">G.21</a> <a href="#">R006</a>	AF Pool Account for RPg students	Charge Account				<a href="#">Transaction</a>	<a href="#">Payment Source User</a>

Step 2:  
Click "Payment Source User" of the particular payment source you are going to grant permission to your colleagues/students.

- If you wish to allow your colleagues or students to make bookings using the virtual ULS cheque account (e.g. **ULS-ABCT-TAIMANCHAN-001**) under your payment source(s), please follow the steps below to grant permission to your colleagues/students concerned.
- Please ignore the amount of virtual ULS cheque account (e.g. ULS-ABCT-TAIMANCHAN-001). ULS staff will keep top-up the amount to prevent user booking failure.**
- ULS staff will also help to assign users to the corresponding ULS payment source of particular supervisor.

## Payment Source User

[Payment Source Detail](#) [Quota assignment](#)

1.12. [REDACTED] ZVH9  
PGMS Project Account F

**Step 3:**  
Click "Add User".

[Add User](#) ⓘ

Name (Net ID)	Dept. Abbrev.	User Type	Email	Role*
G409375 S409375 [REDACTED]	RO	Staff	[REDACTED]@polyu.edu.hk	Owner

## Add Payment Source Member

[Payment Source Detail](#) [Fund Top-up / Release](#) [Payment Source User](#) [Quota assignment](#)

1.12. [REDACTED] ZVH9  
PGMS Project Account P0001133

Search by name, NetID, or email

**Step 4:**  
Input user's name or NetID or email address and then click "Search".

## Select an Existing User

[Name](#) [Username](#) [Dept. Abbrev.](#) [User Type](#) [Email](#)

[SAE9505\\_GAE9505](#)

Can't find the user you're looking for? [Search](#)

**Step 5:**  
Click the name of the user whom you are going to add.

# Add Payment Source Member

[Payment Source Detail](#)[Fund Top-up / Release](#)[Payment Source User](#)[Quota assignment](#)

**Payment Source Number**

1.12 [REDACTED] ZVH9

**Payment Source Type**

Charge Account

**Description**

PGMS Project Account P0001133

**Expiration**

31 Jan 2022

**User**

GAE9505 SAE9505

**Role\***

User

Create

[Cancel](#)

**Step 6:**  
Click "Create".

*\* User: Eligible user to use this payment source*

*Payment Source Admin: Eligible user to use and admin this payment source*

# Quota Assignment

[Payment Source Detail](#)[Fund Top-up / Release](#)[Payment Source User](#)[Quota assignment](#)

1.12. ZVH9

PGMS Project Account P0001133

Committed Amount (HKD)

20000.0

Total Expense Amount (HKD)

0

Free Balance (HKD)

20000.0

Enable quota assignment for members



Name (Net ID)	Role *	Quota (HKD)	Expense (HKD)	Quota balance (HKD)
GAE9505 SAE9505	User	0.0	\$0.00	\$0.00

Save

\* User: Eligible user to u

Payment Source Admin

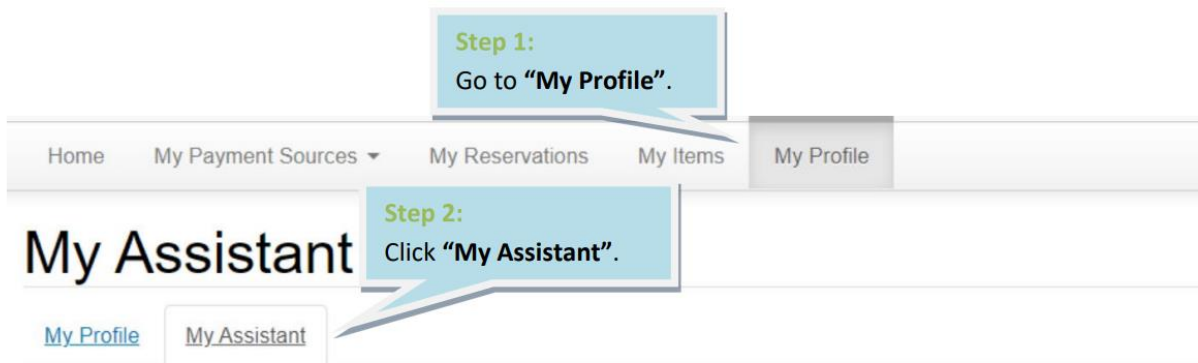
## Step 7:

Go to “Quota Assignment” page and **set quota** (i.e., max. amount) to each user.

## Step 8:

Click “**Save**” to confirm your decision.

# Assign Assistant to Manage My Payment Source(s)



- As a payment source owner, you can assign your colleague to act as your assistant to manage your payment source(s) in this system on behalf of you.

Please note that when you assign an assistant, he/she can :

- (1) Sign the facilities Terms and Conditions on behalf of you
- (2) Make item purchase / instrument reservation on behalf of you
- (3) Manage your payment source, e.g. assign payment source member, make funding request


.. NetID of My Assistant

**Assign**

**Step 3:**  
Input **NetID of the assistant** you are going to assign to and then click **<Assign>**.

# System logout

Click <Logout> to logout.

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URFMS

GJ11033 SJ11033 [Redacted] Cart (0) [Logout](#)

[Home](#) [My Payment Sources ▾](#) [My Reservations](#) [My Items](#) [My Profile](#)

Facilities

Welcome to the University Research Facility Management System (URFMS). Please select the URF(s) below to view and reserve facilities offered by the URF(s).

## Recently Used Facilities

[University Research Facility in Behavioral and Systems Neuroscience \(UBSN\)](#)

# Billing

- Usage cost of bookings from the URFMS will be included in the **ULS monthly invoice** as usual. Supervisors can review the bookings from the monthly invoice.

# For enquiries, please contact

- Any staff of ULS
- RIO at [urfms.support@polyu.edu.hk](mailto:urfms.support@polyu.edu.hk)