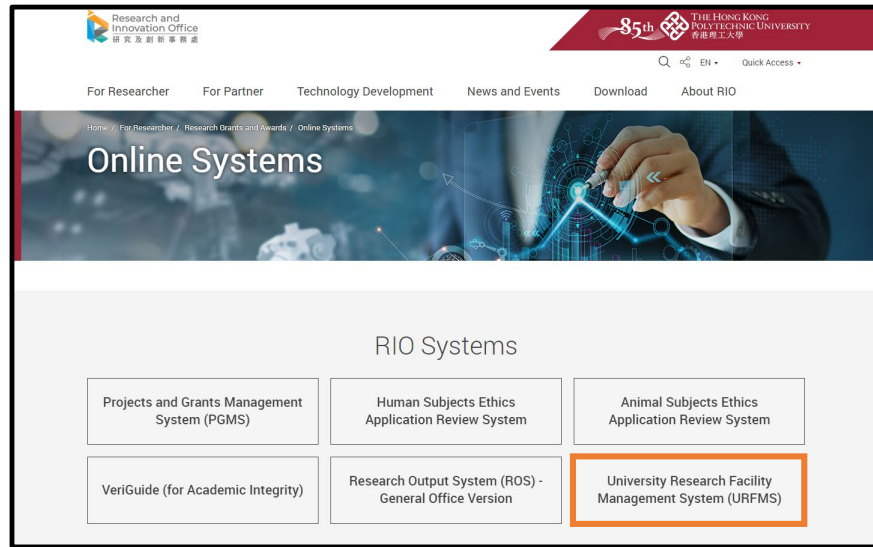


University Research Facility Management System (URFMS) Quick Guide For ULS Supervisor

September 2024

- 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. On the left is the logo for THE HONG KONG POLYTECHNIC UNIVERSITY URFMS 香港理工大學. To the right is a 'Login' button. Below the logo is a search bar. Further down, there are links for 'Facilities' and 'New User Registration'. A welcome message reads: '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 short description 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'.

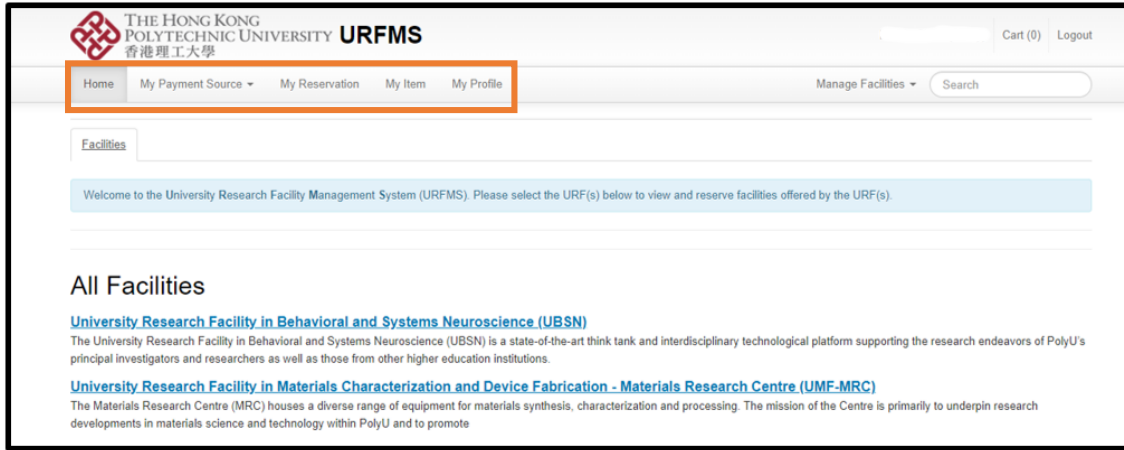


Sign in with your NetID and NetPassword

Keep me signed in

[Forgot Your NetPassword?](#)

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))

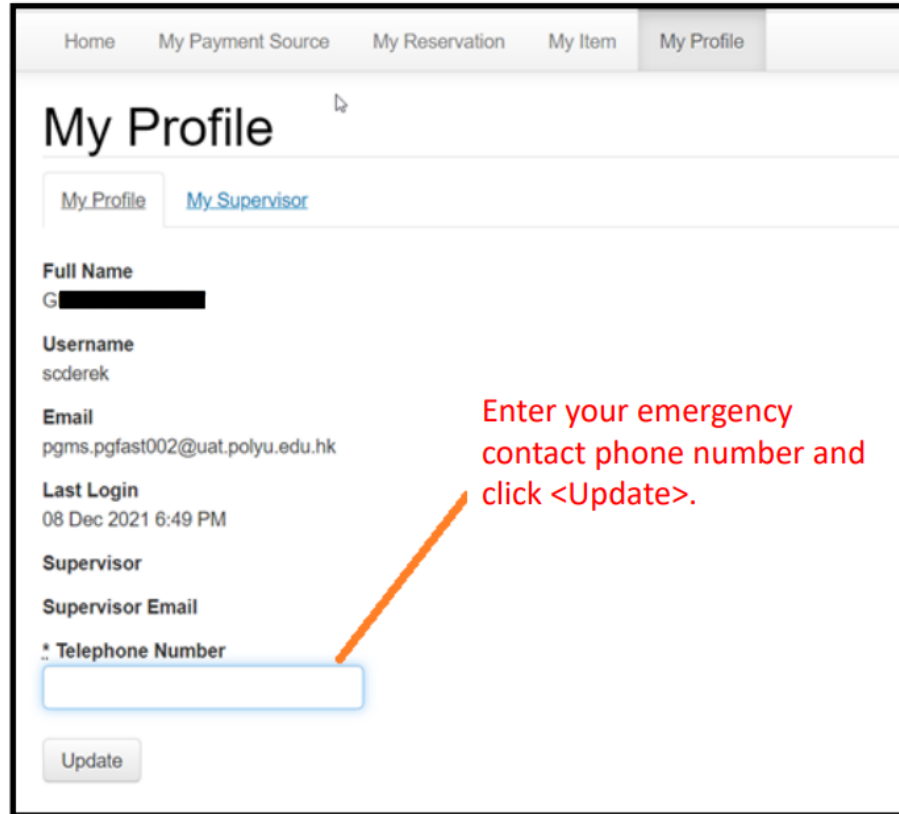
Please note that ULS users can use a virtual ULS cheque account (i.e. ULS-ABCT-TAIMANCHAN-001) as a backup when a true funding account (i.e. PGMS project account) is insufficient fund for reservation

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



Home My Payment Source My Reservation My Item My Profile

My Profile

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

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

Enter your emergency contact phone number and click <Update>.

My Supervisor

Request Endorsements

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

Success, supervisor endorsement request sent.

Supervisor Approval History

Ref. No.	Supervisor	Request date	Status
26	pgama001	08 Dec 2021 6:58 PM	In Progress Request

Search Supervisor

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

*Dept:

Request	Full Name	NetID	Email	Department
<input type="radio"/>	SZUH GN154640	pgama001	pgms.pgama001@ust.polyu.edu.hk	AMA

Supervisor Approval History

Ref. No.	Supervisor	Request date	Status
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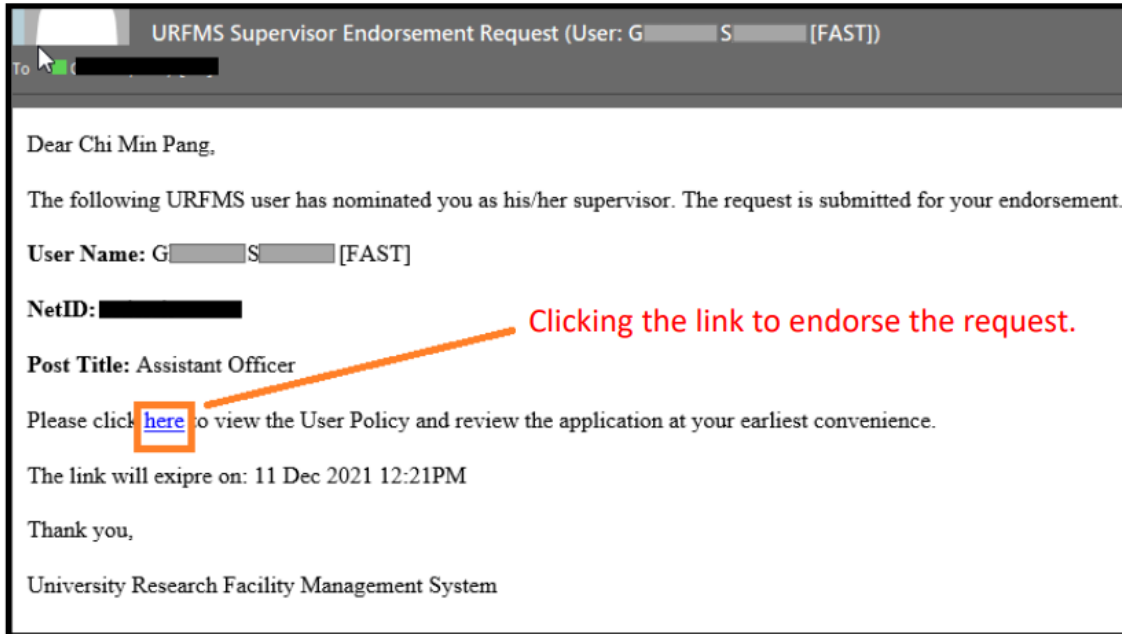
Select your supervisor as appropriate and click <Request> to seek endorsement from your supervisor.

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.



Clicking the link to endorse the request.

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



THE HONG KONG
POLYTECHNIC UNIVERSITY URFMS
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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香港理工大學

GU11033 SJ11033 [REDACTED] Cart (0) Logout

Home My Payment Sources My Reservations My Items My Profile Search

My Payment Sources

Facilities My Transactions My Transactions in Review (0)

Welcome to the University Research Facility Management System offered by the URFs.

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

- If you wish to allow your staff or students to make bookings using the funding accounts under your payment source(s), please follow the steps below to grant permission to your colleagues/students concerned.
- ULS staff will also help to assign users to the corresponding ULS payment source of particular supervisor.

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

My Payment Source

Payment Source	Description	Type	Valid Until	Facility	Free Balance (HKD)		
1.12 [REDACTED] ZVH9	PGMS Project Account P0001133	Charge Account	31 Jan 2022	All	\$20,000.00	Transaction	Payment Source User
1.47 [REDACTED] 0000	BME One-line budget	Charge Account	10 Jun 2021	All	\$0.00	Transaction	Payment Source User
G.11 [REDACTED] R006	AP Pool Account for RPg students	Charge Account	31 Dec 2024	All	\$5,442.00	Transaction	Payment Source User
G.21 [REDACTED] R006	AF Pool Account for RPg students	Char					Payment Source User

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

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			Staff	[REDACTED]@uat.polyu.edu.hk

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

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 [REDACTED].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 [REDACTED]	User	<input type="text" value="0.0"/>	\$0.00	\$0.00

Save

* User: Eligible user to u
Payment Source Admin

Step 8:

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

Step 7:

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

Assign Assistant to Manage My Payment Source(s)

The screenshot shows a navigation menu with the following items: Home, My Payment Sources (with a dropdown arrow), My Reservations, My Items, and My Profile. Below the menu is a section titled "My Assistant" with two sub-links: "My Profile" and "My Assistant".

Step 1: Go to "My Profile".

Step 2: Click "My Assistant".

- As a payment source owner, you can assign your staff 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 :

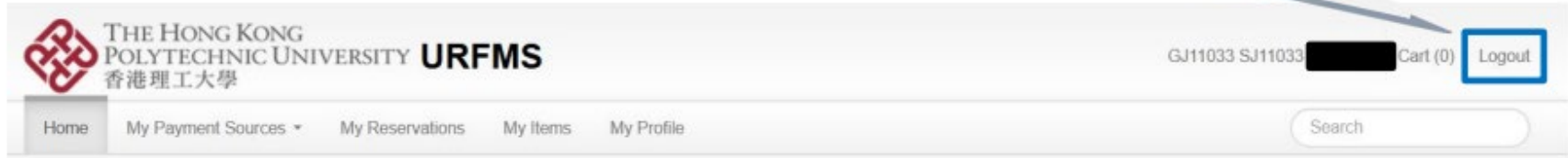
- (1) Sign the facilities Terms and Conditions on behalf of you
- (2) Make item purchase / instrument reservation on behalf of you
- (3) Manage your payment source, e.g. assign payment source member, make funding request

The form has a label "NetID of My Assistant" above an empty text input field. Below the input field is a blue "Assign" button.

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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GJ11033 SJ11033 [Redacted] Cart (0) Logout

Home My Payment Sources My Reservations My Items My Profile

Search

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

- Bookings using true payment sources:
 - The payment will be processed via internal fund transfer within the URFMS. For details, please read the video “Post Reservation Review” in the following link:
<https://www.polyu.edu.hk/rio/guidelines-forms-and-systems/online-systems/urfms/>
- Bookings using virtual ULS payment sources:
 - ULS admin staff will move the related bookings back to a true payment account for internal fund transfer. Issuance of ULS monthly invoice will be suspended.

For enquiries, please contact

- Any staff of ULS
- RIO at urfms.support@polyu.edu.hk