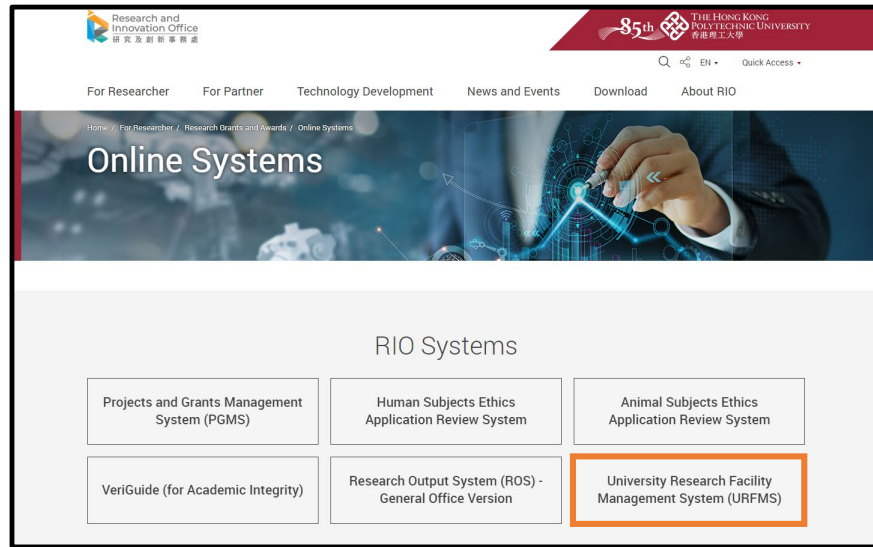# University Research Facility Management System (URFMS) Quick Guide For ULS Supervisor

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

Main Menu
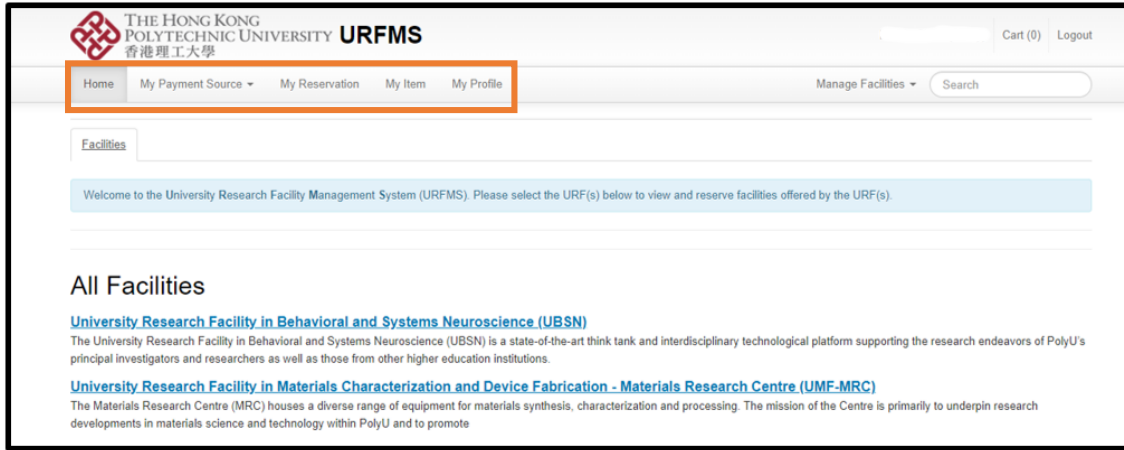
My Payment Sources:

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))

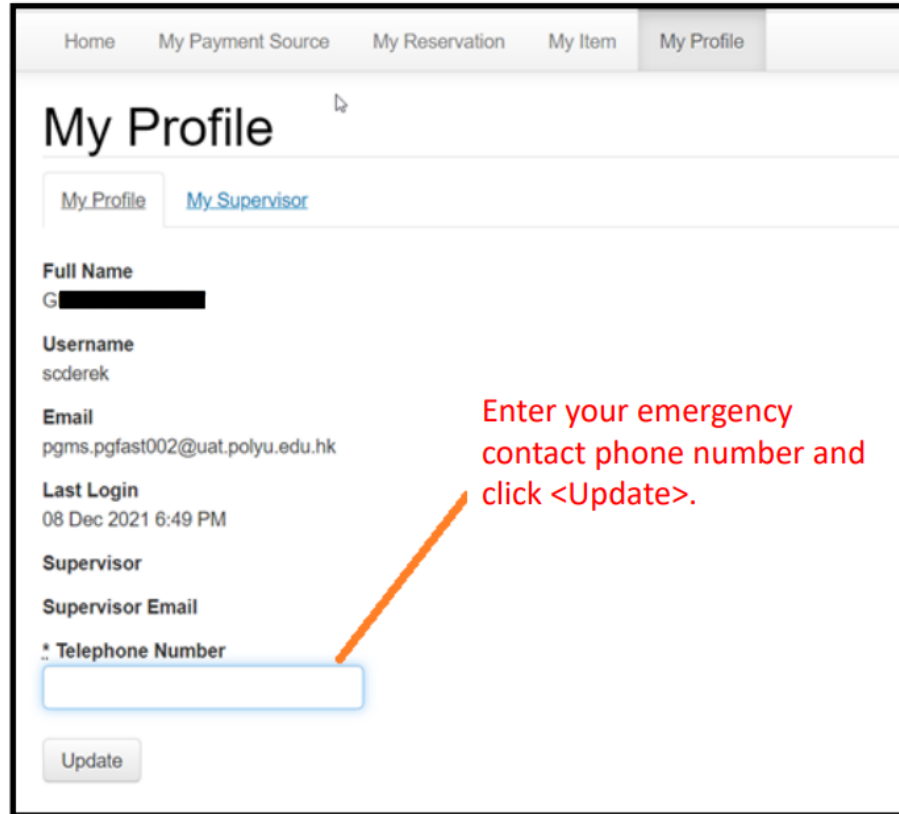**Please note that ULS users can use a virtual ULS cheque account (i.e. ULS-ABCT-TAIMANCHAN-001) as a backup when a true funding account (i.e. PGMS project account) is insufficient fund for reservation**

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

My Supervisor

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.
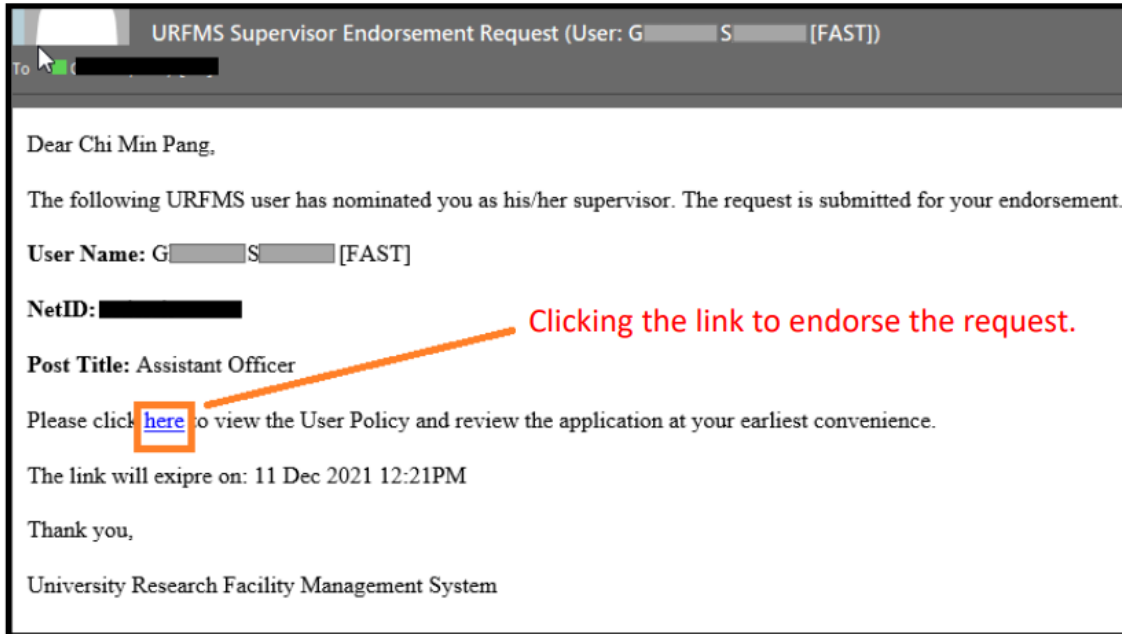
Supervisor Endorsement

- 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

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

- 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.

Payment Source User

Payment Source Detail | Quota assignment

1.12.█.ZVH9
PGMS Project Account P

Add User ⓘ

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

Add Payment Source Member

Payment Source Detail | Fund Top-up / Release | Payment Source User | Quota assignment

1.12.█.ZVH9
PGMS Project Account P0001133

Search by name, NetID, or email

[   ] Search

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	███@uat.polyu.edu.hk

Can't find the user you're looking for? Se...

Step 5:

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

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Add Payment Source Member

Payment Source Detail | **Fund Top-up / Release** | Payment Source User | **Quota assignment**

Payment Source Number
1.12█.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 Admi...

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.

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Assign Assistant to Manage My Payment Source(s)

Step 1:
Go to **"My Profile"**.

Step 2:
Click **"My Assistant"**.

My Assistant

My Profile | My Assistant

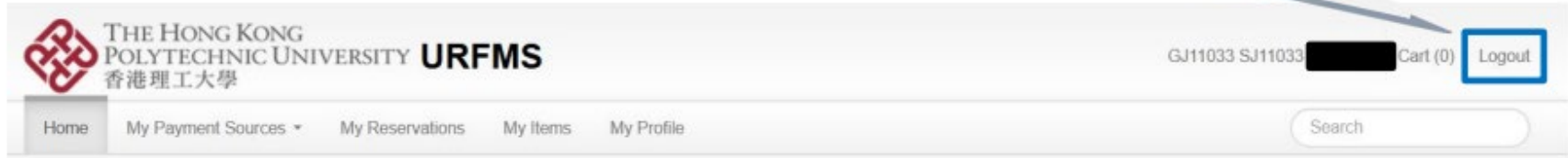### Please note that when you assign an assistant, he/she can :

(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

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

Assign

- 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.

System logout

Click **<Logout>** to logout.

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.

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For enquiries, please contact

- Any staff of ULS

- RIO at urfms.support@polyu.edu.hk