Guidance documents for PPMS Users - Staff and Students:

Contents

Please use this guidance to inform how to interact with the facility booking system (PPMS) and our services. There are detailed instructions on what to do and how to use the PPMS system to maximise information about use of facility equipment and services by research group members. Pricing for the use of facility services is available and can be communicated on a case-by-case basis as explained in the introduction.

Introduction

The new pricing structure in the IRF is the result of a cross-directional effort (IRF, Finance and JRES) to ensure the university recovers income as well as costing services appropriately for researchers and funders; providing auditable appropriate charges for use of equipment and services.

Formerly the "one price for all" concept that was active in the facility did not take into consideration the knowledge that some funders pay overheads directly to the university and as such must not be charged again for use of or access to university supplied services. If this "double dipping" is found to have occurred the organisation is asked to pay the money back, with the cost covered by the institute to which the academic belongs. Additionally, there are funding categories that allow an institution to charge for different expenses incurred

As a result, we have 5 levels of pricing dependent on the source of funding provided.

Funding source	Example	Charge - yes/no	Cost to funder / researcher at point of IRF use

Full Economically Costed (FEC) Grants	UKRI, MRC, BBSRC	Cannot charge for equipment use and services.	Zero. Funds provided via overhead payments to university
Small charities / other funders	BHF	Can charge for equipment use and services.	A portion of what it costs the university to provide
Commercial Grants	Grants from Pharma companies	Can charge for equipment use and services.	A portion of what it costs the university to provide
Internal recharges	University sourced funding	Can charge for equipment use and services.	A portion of what it costs the university to provide
Commercial rates	Access of facility by external parties	Can charge for equipment use and services.	Benchmarked pricing – not less than what it cost the university to provide

Since this has been implemented, any subproject codes that you currently have in the booking system within the IRF have been linked to the correct stream of funder as informed and checked by the Head of Funding JRES. Majority of prices for our equipment and resources are cheaper than the single price available before. This means that no research currently costed for will be detrimentally affected by the costings review within the IRF, which was the result of no prior analysis of costs or knowledge of the funding obligations for researchers and the university. Additionally, future grant costings will be appropriately costed and work in synchronicity and alignment with the JRES and external funding obligations.

For future grants, PI's should complete a template 04.05.2022- Facility Operations - IRF Grant Costing Template v1.0: currently available from the IRF staff, soon to be on the website) and send to irf@sgul.ac.uk. Upon receipt, we in the IRF will identify which stream of funding the grant will sit within, continue to cost the project and then provide the PI with the completed template ready to work with the JRES on the funding application.

How to create an account on PPMS - St George's staff and students

This document details the process to create a user account on PPMS. Please note that because of the checks involved in the process, it can take time for accounts to be validated – f**or this reason you must create your account well in advance of using the facility.**

All users of the IRF – whether booking equipment themselves or paying for services – are required to create an account on PPMS. To set up your account, please follow these steps:

1. Visit https://ppms.eu/sgul/?IRF and select "Login with your St George's, University of London credentials"
2. Read the presented documents, and tick the "agree" box to continue

3. Fill out the empty fields in the Account Creation request form – <u>username, email address, and name are determined by the single sign-on and do not need to be modified</u>. **Note:** Account Number refers to subproject code and is required for invoicing any equipment bookings or work done as a service. You can change the subproject code at any time by following the guidance in "How to manage subproject code use in PPMS"
4. Submit account creation request and await confirmation by IRF staff who will take steps to validate the account

| Home | Account creation request | Schedules | Logout |

Login

| Login with your St George's, University of London credentials (for St George's, University of |

| Login with your PPMS credentials (for external users) |

- If you do not have an account yet, you can fill in a user account creation request
- If you cannot login or have any trouble please contact: IRF facility, email:irf@sgul.ac.uk, phone:020 8725 5218
- You can also view a list of public documents

5. The IRF PPMS Administrator will validate your account – subproject codes submitted at this stage are checked by the Joint Research and Enterprise Service (JRES) and Finance before accounts are validated. If there are any issues you will be contacted via email at the address provided in the request.
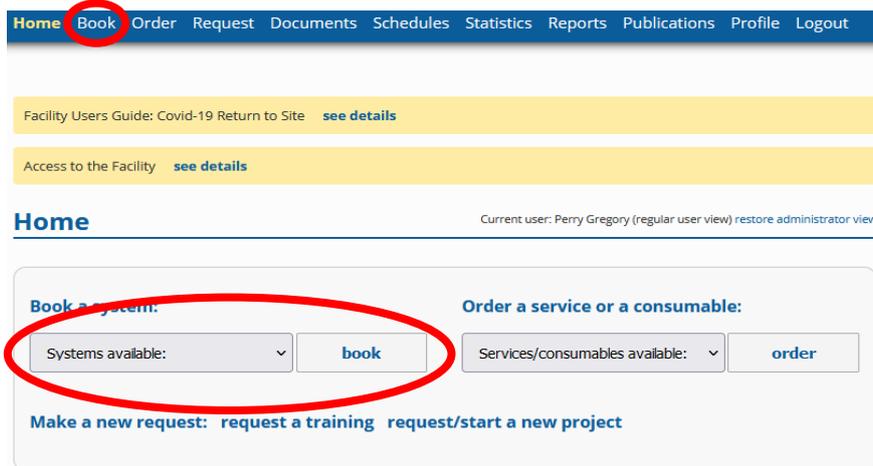
How to book equipment on PPMS booking system

This document will explain the process of booking equipment on PPMS. <u>In order to do this, you must have a valid user account.</u>

1. **Setting up new booking:**

   To book equipment, please follow these steps:

   1. Go to ppms.eu/sgul/?IRF and log into your account
   2. From the home page, click on the "Book" tab, or open the "Systems available:"

   dropdown

   3. Select the System (equipment) that you wish to book
   4. From the System calendar, select the time slots that you wish to use by clicking on the box for the corresponding time. If you are using Credit, IRF Research Excellence Fund award or a specific project please select this from the Project list at the top of the calendar – Failure to do so will mean incorrect charging. **Note: it is your responsibility to check the subproject code that this work will be charged to can be used and has sufficient balance – for every booking, your subproject code is shown in the "Financial account #" field above the booking calendar. If you need to change subproject codes, follow the guidance in How to manage subproject code use in PPMS before creating a booking.**
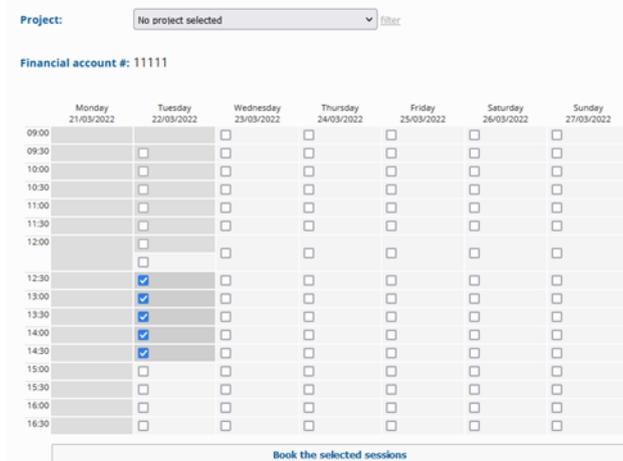
   5. Click on "Book the selected sessions" to make your booking

2. Modifying existing bookings:

Once a booking is made, at any point before it starts, you can Reschedule or Cancel the booking. Once the session has started, you will lose the ability to reschedule and cannot cancel sessions that are current or in the past. To cancel a session in the past, contact irf@sgul.ac.uk with the session information (date, time, and instrument) and the reason why the booking was not cancelled in advance – cancellations in this manner are handled on a case by case basis and repeatedly missed bookings or invalid reasons for late cancellations may result in the session being charged.
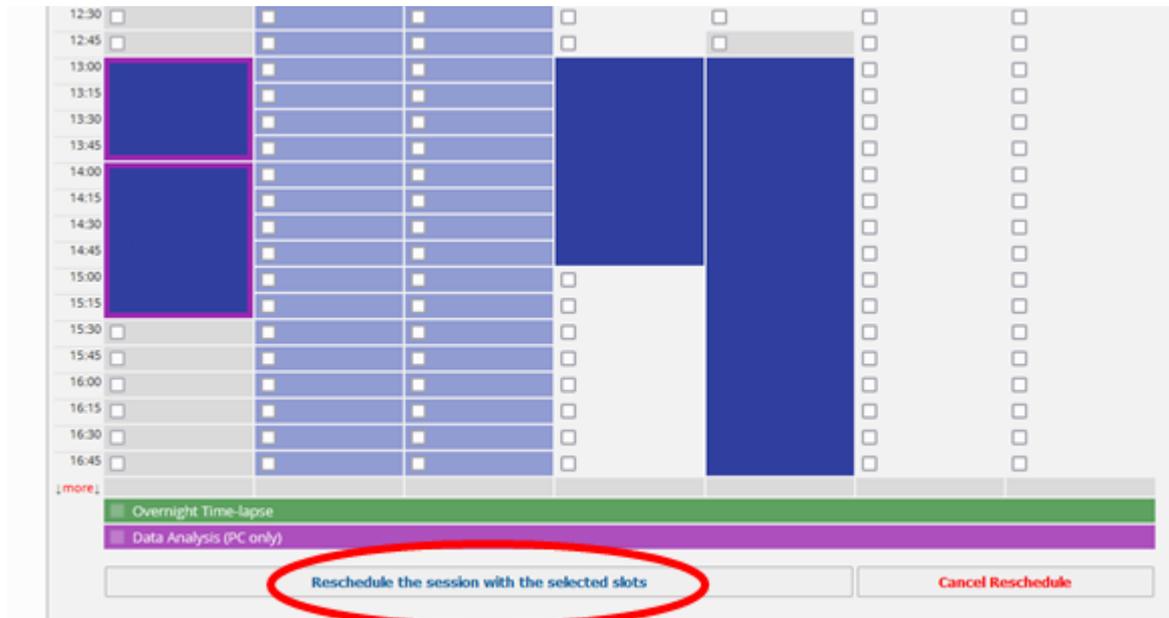
Rescheduling

To reschedule an existing booking:

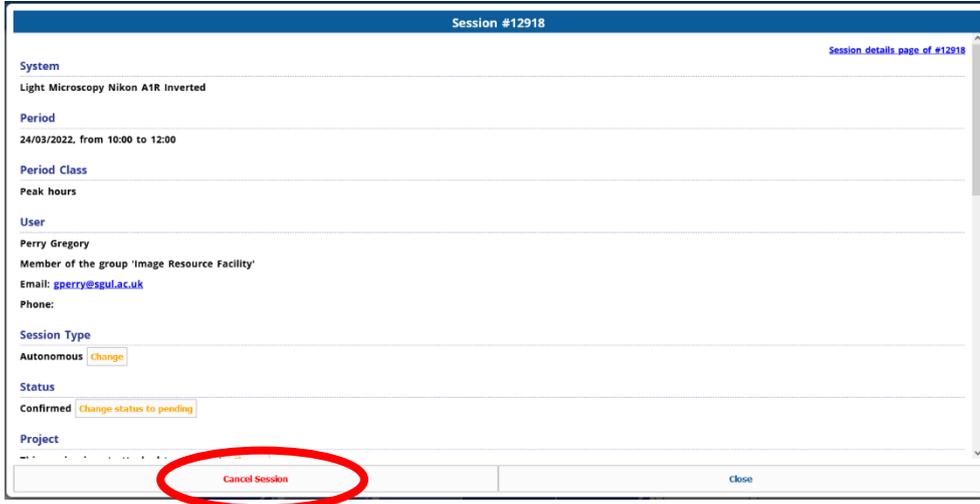1. Click on the pencil icon on the booking in the calendar:
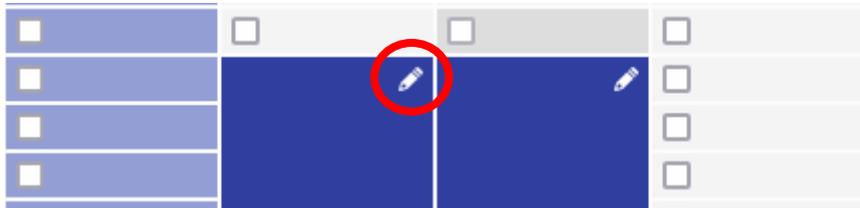
2. Re-select the time slots that you wish to use, and click on "Reschedule the session with the selected slots"

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3. Cancelling an existing booking

Before the session starts, if you wish to cancel a booking, click on it in the System calendar then select "Cancel session"

If your session has begun, "Cancel session" will become "Cancel rest of session". This option will cancel any portion of the session still to occur, rounding up to the nearest time block. In the above example, at 10:10, a session booked from 10:00-12:00 would be shortened to 10:15, as the time slots are 15 minutes long.

If you cannot use a booked session but have not cancelled it in time, follow the procedure described in "Modifying existing bookings above":

How to manage my account (subproject codes)

PPMS uses Account Numbers to assign subproject codes to bookings and orders. It is essential to maintain valid subproject codes as these are used to generate invoices as part of the monthly internal recharging process. Subproject codes submitted to PPMS are checked with the JRES by IRF staff before they are permitted to be used on the system. This is done to ensure that the correct price for use of the facility is attributed to each finding source. For this reason, there can be a delay between the initial submission of a code and that code being validated on the booking system.

1. Changing your default subproject code

Your default Account Number is the subproject code that will be attached to any bookings or orders that you place

To change the subproject code associated with your user account, please do the following:

1. Go to ppms.eu/sgul/?IRF and log into your account
2. From the homepage, click on the "Profile" tab
3. Under "Financial Account Information", click on "Change your default account

Financial Account Information

Default Financial Account Number:

88888

Change your default account number

number"

4. Click on the box under "Please enter the new account number"

Please enter the new account number :

submit account number modification request

5. Input the desired subproject code
6. Press "Save"
7. Click on "submit account number modification request"
8. An IRF administrator will review your request and confirm it once the subproject code has been validated

2. Adding additional Account Numbers

It is possible to maintain multiple Account Numbers, allowing you to choose which subproject code to use for a booking or order. To add an additional Account Number, please do the following:

1. Go to ppms.eu/sgul/?IRF and log into your account
2. From the homepage, click on the "Profile" tab
3. Under "Financial Account Information", click on "New account authorization request"

Request authorization to use a financial account:

New account authorization request

4. Click on "search an account" and input your subproject code – if it is a new code, you will need to click on "Create this new account"

Select or create an account

| 12345 | 🔍 Create this new account |

5. Click on "Save"
6. An IRF administrator will review your request and confirm it once the subproject code has been validated.
7. Once your additional Account Number has been added, you will be able to select it from a dropdown menu when you make a booking or place an order

Book a session for:	Perry Gregory	filter
Project:	No project selected	filter
Financial account #:	88888	Request a financial account number

Monitoring the usage of the facility by members of the research group
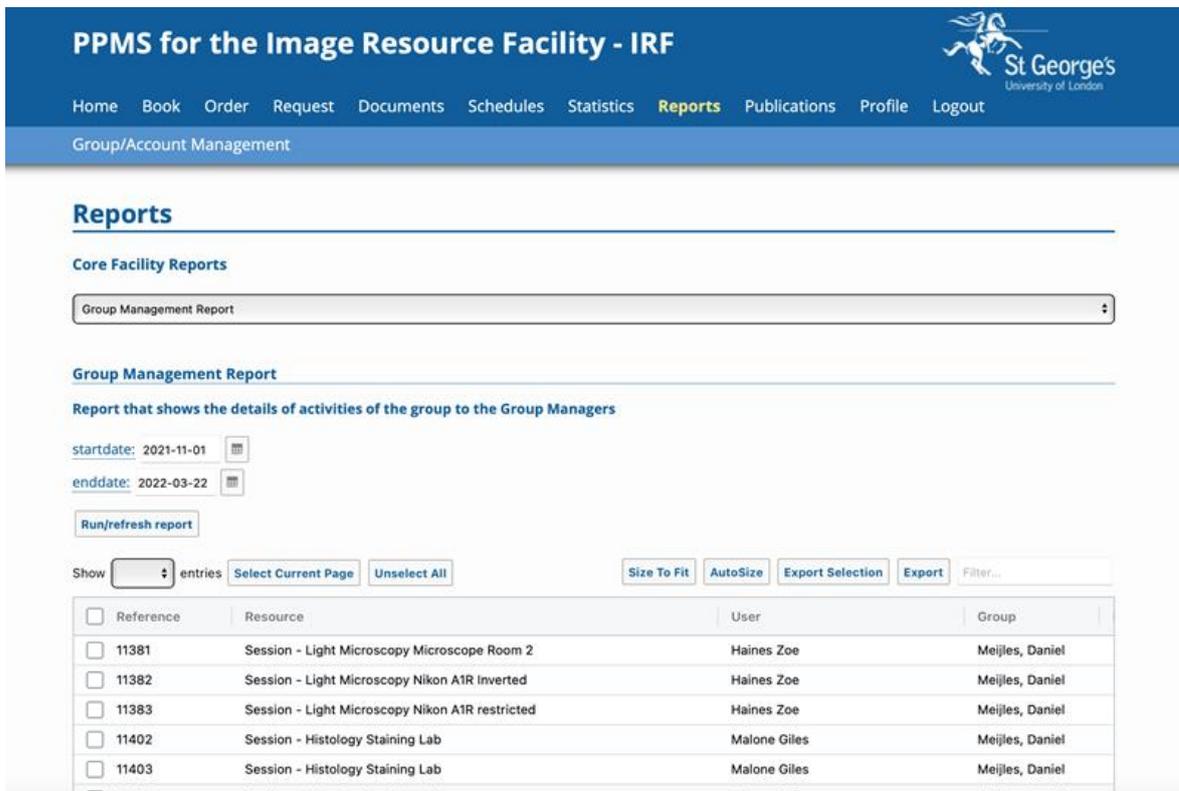
Within PPMS, Group Managers should be set up, this allows researchers to see usage for all users within their group, and to access invoices for work charged to their group. Account Managers can also be set up, giving users additional control over the Account Number (subproject code) that they provide. The ability to change the subproject code in use is not tied to being an Account Manager – a basic user can request to stop using their default sub project number if the account has run out of funding- this can be done with default profile settings, covered in– see guidance "How to manage subproject code use in PPMS" for details.

1. **Setting up to be a Group Manager and running the Group Management Report**

To become a Group Manager, you must make a request by emailing irf@sgul.ac.uk and CC'ing the Principal Investigator (PI) of the group (if you are not the PI). This is not an exclusive role, there can be multiple Group Managers per group – <u>helpful if there are more than one supervising PI attributable to the research</u>, or if another individual is involved in managing the group (e.g. Research Assistant).

Group Managers can – **at any time** – run the "Group Management Report" on the PPMS Reports tab to get a table of their Group's usage. To do this, follow these steps:

1. Go to ppms.eu/sgul/?IRF and log into your account
2. Click on the "Reports" button on the home page

3. Excerpts from monthly Invoices are automatically available to Group Managers according to their specific subproject codes via the Groups/Accounts Management tab.

2. Cancelling/shortening sessions

All users can cancel their booked sessions in advance by clicking on their booking on the calendar for the specific equipment and pressing the "cancel session" button on the pop-up window.

If a session has already started (e.g. The session is booked from 15:00-17:00 and the current time is 16:13) the "cancel session" button is replaced with "cancel rest of session", which will remove all outstanding time from the session up to the nearest increment, rounding up (e.g. In the example given, the booking will terminate from 16:15 as calendar increments are 15 minutes).

The facility staff advise users to book the time that is sensible and appropriate for their work (please speak to IRF staff if in doubt)

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## IRF Research Excellence Fund – how to activate and use the award

Congratulations on your successful application.
To set up your award **you must do the following in order**:

1. Meet with the relevant section specialist to discuss any training requirements or access
2. Request the IRF staff PPMS administrator to create a Project for you on the PPMS booking system - **this must be used on all bookings for your Research Excellence Fund Project** and this is essential to ensure that your usage is charged at the correct rate. **Failure to use the Project will result in the full cost of equipment use being charged against your supplied Subproject code**. You must provide a subproject code from which funds will be provided.
3. IRF staff will set up your Project(s) and inform you by email when complete.

   Now you are set up to begin the use of facility equipment and services at low-cost.

4. Log into your PPMS account and use the "Book" tab to access the booking calendar for the equipment (e.g. LiveCyte) you wish to use or service (e.g. wax sectioning) you wish to access.
5. Use the Project dropdown to select your Research Excellence Fund Project

Book a session for:	Professor Wonderful	filter
Project:	IRF Research Excellence Fund: Professor Wonderful	filter
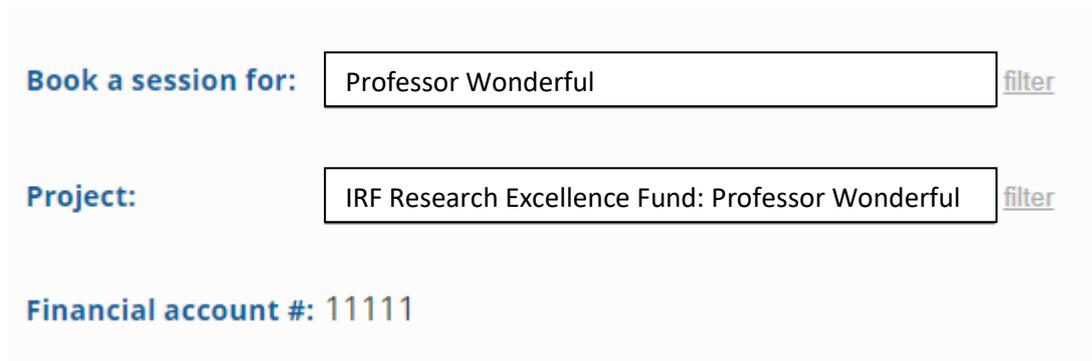
Financial account #: 11111

6. Check that the appropriate Financial account # is displayed - checking that it is the same subproject code provided in step no. 2
7. Book the equipment or service as usual

Once your project has started, you can check your booking history from the "My Projects" square on the Home page:
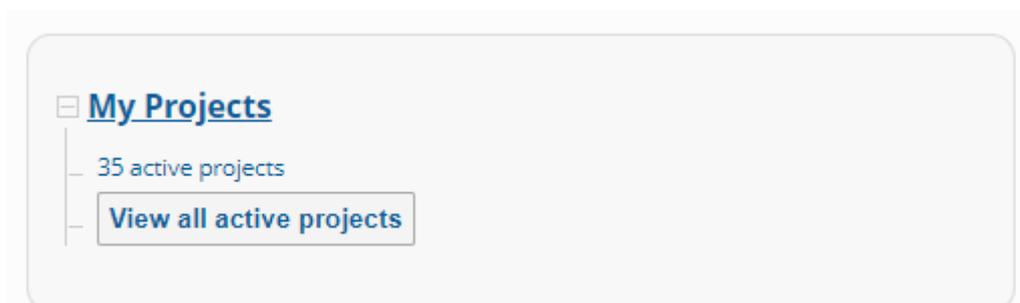
⊟ **My Projects**
35 active projects
View all active projects

You will have **6 months** to complete the research activities, with a **further 6 months to report** back to Imaging Advisory Group (IAG). Please use the IRF Research Excellence Fund Reporting Template on the IRF webpages.

How to order staining, slides, or tissue processing

Staining, slides and tissue processing (embedding or sectioning) are ordered as individual units on PPMS; often, you will need to place an order for the number of units that you require, then book the equipment needed to generate them (e.g. For Sectioning – Wax, you will need to order the number of samples that you intend to section, then book the Microtome in order to carry out the sectioning. In this example, the associated charge is drawn from the number of samples sectioned, and the microtome booking is not charged). **Please see the table at the end of this document that details which equipment must be booked depending on the item ordered.** To place an order, complete the following steps:

1. Go to ppms.eu/sgul/?IRF and log into your account
2. Click on the "Order" button on the home page
3. Select any specially created Project that you would need to apply your order to, or leave the field blank if you are not using a Project – note that pricing can vary depending on Project type selected (e.g. IRF Research Excellence Fund or if you have credit in the facility) so if you are using a specific project, ensure that it is selected at this stage so that the correct price is applied
4. Check that the subproject code (financial account) selected is the one that you wish to be charged against. *If you have credit it will come from there if the credit project has been selected*
5. Fill the "Quantity" field for each item that you wish to order – note that for stains, each "unit" is a slide that you intend to stain. E.g. For 20 slides, place an order for 20 units of your stain.
6. Click on "Order" to submit your order – IRF staff will then process your order (note that this is not instant, so ensure that you place your order before you need to use the equipment)

7. Take note of your Order Number
8. **Next you must book the relevant equipment or space in the facility** using the booking tab. Take your order number and supply this when booking equipment to process your samples - see table below. (one order number can be used any number of times, if the ordered items are still being processed). Your Order Numbers can be found by click on the "My Order History" tab on the home page:

Table showing relationship between items ordered and equipment to book

Activity	Item to order	Equipment to book
Purchasing APES-coated slides	APES-coated slides	-
Embedding tissue for cryosectioning	Embedding - Cryostat	Histology – Staining Lab
Embedding tissue for wax sectioning	Embedding - Wax	Histology – Embedding - Wax
Staining slides with Haematoxylin and Eosin (H&E)	Haematoxylin and Eosin (H&E) Stain	Histology – Staining Lab
Immunohistochemistry on slides	Immunohistochemistry	Histology – Staining Lab

Staining slides with Lillie's Trichrome	Lillie's Trichrome Stain	Histology – Staining Lab
Staining slides with Picrosirius Red	Picrosirius Red Stain	Histology – Staining Lab
Sectioning frozen tissue using the Cryostat	Sectioning - Cryostat	Histology – Sectioning – Cryostat HM525 NX Or Histology – Sectioning – Cryostat Leica CM1900
Sectioning wax embedded tissue blocks using the microtome	Sectioning – Wax	Histology – Sectioning - Wax

How to book IRF staff for service work

Staff at the Image Resource Facility can carry out work on the behalf of a user and this will be charged at our service rates which are higher than standard DIY rates. The process for scheduling work done as a service is as follows:

1. Contact irf@sgul.ac.uk with your query and inform the facility that you wish to have work done on your behalf – the relevant member of staff will contact you to set up an initial meeting to establish your requirements.
2. You will be provided with a quote for the work requested

Requesting a Service Project

To begin the work quoted for, you will need to request a Project on PPMS. To do this, follow these steps:

1. Go to ppms.eu/sgul/?IRF and log into your account
2. Click on the "Request" button on the home page
3. From the list under "Project Creation Requests" select "SGUL Researchers with subproject code – work done by IRF staff."

4. Fill out the form and include your quote reference in the project title
5. Click on "Submit request" to finalise the form

6. IRF staff will set the Project up on PPMS and use it to record all usage against the provided subproject code – recharges will take place monthly

SGUL Researchers with subproject code - work done by IRF staff.

Please enter a title for your project:

Please enter a short abstract/description for your project:

Please define the account number to use for services and activities linked with this project:

Please answer the questions below:

Please add your subproject code to the "Account number" field.

This form is intended for SGUL researchers with an active subproject code for their intended work. Please contact irf@sgul.ac.uk if you are unsure which project form applies to you.

Please fill out this form prior to IRF staff commencing service work within the Image Resource Facility.

Once set up this Project will be used by IRF staff as a repository for all work done towards this specific project and subproject code. Work will be charged monthly. Please add any relevant notes below:

Submit request

How to acknowledge the IRF in publications

This is an obligation for **all** facility users, is part of the normal research process and embedded in research integrity. The IRF is an integral part of the research environment at St George's and as such, acknowledging the contributions that our equipment and services make to publications. Knowing the publications that we have contributed to allows us to demonstrate our impact and attract funding for further development of our equipment, which in turn provides greater research tools to our users.

Service Level Agreement

The Service Level Agreement for the Image Resource Facility states the following:

Acknowledgement and Authorship: Any publications generated as a result of IRF resources should be acknowledged as part of the standard acknowledgement process using the following template: "We acknowledge the use of the Image Resource Facility, St George's University".

Where service level technical support has been given by IRF staff, the following statement should be included in the methods section of any publication: "[technique (insert as appropriate)] was performed by Image Resource Facility, St Georges University".

Where significant technical and creative input is given by IRF staff they should be named as an author on the publication. This will be ascertained as part of the service and research collaboration relationship. Publications include all submitted student thesis, abstracts, posters and scientific papers.

Examples of contributions meriting co-authorship include developing or adapting protocols to suit samples or materials, designing or re-designing experiments, or extensive data analysis and interpretation.

Notifying the IRF of Publications: on PPMS

The Publications feature of PPMS allows the IRF to track publications using our equipment – this is essential to the continual growth and development of the facility, and hence the level of support provided to researchers.

To report a publication, click on the "Publications" button on the home page.

Report a publication

Please enter the details of your publication below.
This is very important for us when we submit grant applications or grant renewals, so thanks in advance for your help!

Publication details

The Publications page has entries for PubMed ID and DOI – supplying these and clicking on "Search and populate publication details from online databases" will perform a search and automatically populate the fields:

- Journal Name
- Year of publication
- Month of publication
- Volume/page
- Title

These fields can also be entered manually if the PubMed/DOI is unknown/unavailable.

The remaining information requested pertains to PPMS – you will be requested to indicate the Group(s), User(s) and System(s)/Service(s) involved, and a field is available to specifically acknowledge Facility Staff members that contributed.

Once your entry is complete, click on "Submit" to add the publication to PPMS.

Essential reading: documentation that users must be aware of

This document compiles all the relevant facility documentation that is presented to new users when they create an account on PPMS. These are accessible from the "Documents" tab on the PPMS home page.

1. IRF Data Storage Policy

Users of the Image Resource Facility (IRF) are solely responsible for the storage and security of data generated as a result of their operation of IRF data-generating instruments (eg microscope images). Whilst use of local storage is permitted, users must ensure they take a copy of their data at the end of their session either via BitLocker-encrypted removable drive, OneDrive, or server upload.

The IRF is not responsible for data loss from local storage and instrument PCs are monitored for drive space with regular drive clearance occurring when required. Local storage solutions are provided solely for the generation of data and if these provisions reach capacity, files will be deleted to provide space. Best practice requires as much free space as possible so as not to impact other's work, and all users are encouraged not to store data locally for any period of time.

Data generated by IRF staff on behalf of facility users will be stored securely until a copy can be taken by the user, after which liability returns to said user.

Please contact SGUL IT for guidance on – and solutions for – secure storage of data.

Please direct any queries to irf@sgul.ac.uk

2. Access to the Facility

Access to the facility will be by booking on the PPMS system only.

IRF staff will be on-site daily for the performance of scheduled laboratory work. There are times when staff will be remote working and can be accessed via email. If you will need support, contact the IRF and do not proceed with any experiments until you have received confirmation from IRF staff. The Facility core hours are 9-5pm daily. Work and access outside of those hours is discouraged, however if this is unavoidable we ask that users get permission from the section lead, work in-line with their risk assessments and follow the university guidance on Lone Working.

Facility access: IRF staff on-site

Access will be as usual, rooms will be unlocked.

Facility access: IRF staff not on-site - rooms not unlocked

the following process will be used:

• When users are booked into IRF equipment booking systems, on the days that IRF staff are not on site, Isabelle Crevel or Sandra Ashton will send an email to security SGUL-Security@sgul.ac.uk and Mell Masters mmasters@sgul.ac.uk stating who that person is and what time they will need to pick up the keys (for specific room and handwashing access).

Please also send IRF staff an email to inform of access requirements – there will be a response within 48hrs

• The person collects the key at the designated time

• Person opens the required room (following all facility hygiene rules – wash hands!!)

• The key can remain with the user until session has finished, after which it must be immediately returned to security.

• Security will inform IRF of any deviations from the process by facility users.

Note

There may come a time when IRF staff are unwell and unable to respond to emails. Every effort will be made to communicate with users in that instance –

do not proceed with experiments unless you have had a response from IRF staff.

Please contact irf@sgul.ac.uk if you intend to make use of Light Microscopy equipment for which you will need specific in-person assistance or arrangement for on-site assistance when required. remote support is available via Teams when working remotely.

Many Thanks

Sandra

3. IRF Personal Data Disclaimer

The Image Resource Facility at St George's University London collects your name, email address, telephone number, recharging details, and IRF equipment use history for the purposes of administering our services/booking system. We use an external service provider, Stratocore, to deliver our booking system. SGUL and Stratocore will only ever use your details to facilitate your access to the Image Resource Facility's services. We will not share your information with any third parties and the information will not be used for marketing. Your information will be kept securely on encrypted servers maintained by Stratocore and only accessed by authorised persons (IRF staff). Your information will be kept until the cancellation of your account or the discontinuation of the IRF use of PPMS from Stratocore; should you cancel your account or the IRF discontinue the use of PPMS, all user data will be securely destroyed. Contact irf@sgul.ac.uk for queries about how we use your details or to obtain a copy of the personal data we hold for you. If you have a complaint please contact irf@sgul.ac.uk in the first instance. If you wish to take the matter further you can contact the Information Commissioner's Office Helpline on 0303 123 1113.

4. Facility Users Guide: Covid-19 Return to Site

All users must read the attached Facility Users Guide in advance of using equipment in the IRF. Please read this document and contact the relevant section lead to confirm that you have read it and intend to use equipment within their remit (Sandra Ashton: IHC & Histology, Head of Facility / Light Microscopy / Isabelle Crevel: Flow Cytomtery).

The facility is not guaranteed to be staffed every working day and as such arrangements for access will need to be made in advance with the SGUL security office; contact the relevant staff member at the time of making your booking to arrange this.

https://ppms.eu/sgul/getfile/?pf=2&id=4-9A145BD0

If you have already received this document via email and confirmed, please simply close this message. Access will not be granted to users that have not confirmed they have read the user guide.

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