# System for Harmonizing Academic Resource and Equipment (SHARE) non-University members manual

Ver. 1.2

Tohoku University Technical Support Center

TECHNICAL SUPPORT CENTER

-System for Harmonizing Academic Resource and Equipment (SHARE) non-University members manual-						

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# About the system

# 1.1. Purpose of the system

By creating a database (centralized management) of the facilities managed by the University and making
it available to the public both inside and outside the university,

We aim to promote the wide range of use of equipment.

2. By reviewing the on-campus facility reservation system, we will improve the convenience of facility reservations.

We will strive for efficient business operations from equipment reservation to payment processing.

### 1.2. System Overview

The following functions are available in this system.



1. Apply for the use of facilities

In order to use the equipment, we will apply for the use of the facility and renew it for the next year.



2. View detailed information of the equipment

You can view detailed information about the equipment.



3. Check the reservation status of each facility

On a weekly basis, you can check the availability of equipment.



4. Book your equipment

You can reserve facilities that can be booked in the system.



5. Register usage information for each facility reservation

You can register your usage records from your own PC, smartphone, or digital usage book installed near the facility.



6. Checking the details of the usage fee billing (limited function for the person in charge of use) You can set a billing address for each usage record of the facility and check the usage fee billing information for each billing destination.

### 1.3. Menu List

Click Menu in the upper right corner to open the menu list.

Booking Calendar

Reservations and results of facilities for which the application for use of facilities has been approved

It is displayed in a weekly calendar.

▶ What you can do from this screen

Facility Reservation Registration and Reproduction

Facility Reservation Confirmation, Change, Cancellation

Usage resultsregistration

Usage Results: Changes, Confirmations, and Approvals

② List of Facility Reservations

Displays a list of facility reservations for which you are the user or the person in charge.

▶ What you can do on this screen

Facility Reservation Registration and Reproduction

Facility ReservationConfirmation, Change, Cancellation

■ 予約カレンダー

₩ 設備予約一覧

計 利用実績一覧

引用料金請求一覧

☑ 設備利用申請

利用実績一覧 <モバイル>

₩ 設備一覧

▶ 利用者情報変更 (User information Change)

🚦 請求先情報

ゅ ログアウト

3 List of Usage Results

Displays a list of usage records in which you are the user and the person in charge of use.

▶ What you can do on this screen

Usage Records Registration

Usage Results: Changes, Confirmations, and Approvals

4 Usage Fee Billing List

If you are the person responsible for the use (or the person in charge of the proxy),

Displays the equipment usage fee billing data in a list.

▶ What you can do on this screen

Usage Billing Data Confirmation \_

Billing Statement Billing Adjustment

Usage Billing Statement Bulk Approval

Usage fee billing data **Download Excel** 

⑤ Application for use of facilities

Displays a list of Application for equipment usage for which you are the user or the person in charge of use.

► What you can do on this screen

Facility Usage Application Registration

Application for use of facilities: <u>Confirmation, change, cancellation, approval of the person in charge</u>

Application for use of facilities <u>Application for suspension of use / renewal</u>

### 6 Equipment List

This is a list of facilities that are open to the public outside the university.

What you can do from this screen

Facility Informationconfirmation

Application for use of facilities registration

Facility Reservation Registration

### Change of user information

Check and change your account information.

▶ What you can do on this screen

Account Information Change/Confirmation

### 8 Billing information

Displays a list of billing information that you have.

What you can do on this screen

Billing information added/removed

### 1.4. Flow from reservation to use of facilities

If you want to use the system, you must first create an account.

After that, the application for the use of the facility is registered, and after the application is approved by the person in charge of use, the facility reservation can be made.

\* Depending on the settings at the time of approval of the facility use application, it may be necessary for the administrator to approve the reservation.

(For information on the application for the use of facilities, please refer to "<u>5.Before you book your facilities</u>.) (For facility reservations, see "<u>6.Until you reserve and use the facility</u>.")

After use, billing will be processed when the user, administrator, and person in charge of use confirm the results.

### 2. Create an account

Create an account to use this system.

# 2.1. Enter and authenticate the email address of the account you created

From the top page, click "Login for non-Tohoku University ID" to move to the system authentication screen.

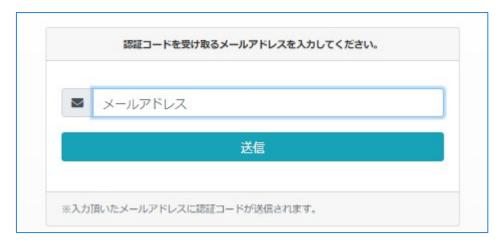


Click the link at the bottom of the system authentication screen that says "If you want to get an off-campus account, please apply here."



Enter the email address where you will receive the verification code to create your account.

\* The e-mail address you enter will be the e-mail address and login ID of the account you created.



When the email is sent, you will be redirected to the authentication code entry screen. Enter the 6-digit verification code in the email you received.

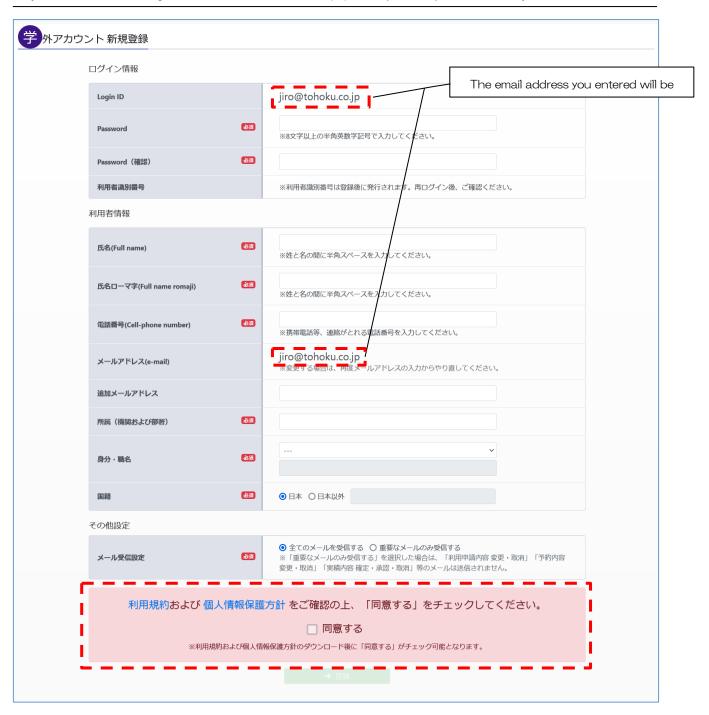
If you do not receive the email, click the link "If you do not receive the email, please try again by entering your email address" and enter your email address again.



On the new off-campus account registration screen, enter your account information.

After entering the required information, please download the Terms of Use and Personal Information Protection Policy from the link and check the contents.

After confirming the contents, you can create an account by checking "Agree".



Your account has been created with the information you entered. Click "Go to login screen" to log in to the system.

# 3. Log in to the system

### 3.1. Local Account Authentication

From the top page, click "Login for non-Tohoku University ID" to move to the system authentication screen.



Log in by entering your registered ID (email address) and password.



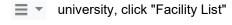
### POINT

What to do if you can't log in

- Incorrect login ID or password
  - → Contact the Tohoku University Technical Support Center.

# 4. See the equipment registered in the system

To display a list of facilities that are open to the public outside the in the upper right menu to display the facility list screen.



To see detailed information about the facility, click the Details button.



# 4.1. About equipment details



"Apply for use" button

When you click the button, the subscription request screen is displayed.

(The application for use is "5.2.Refer to "Applying for Use from the Facility")

2 "Make a reservation" button

It is displayed in the case of facilities that can be booked. When you click the button, the reservation screen will appear.

(Reservations can be found in "6. Until you reserve and use the equipment.")

\* You need to apply for use in order to reserve the facility.

If you would like to reserve and use the facility, please click the "Apply for use" button and register the application for use.



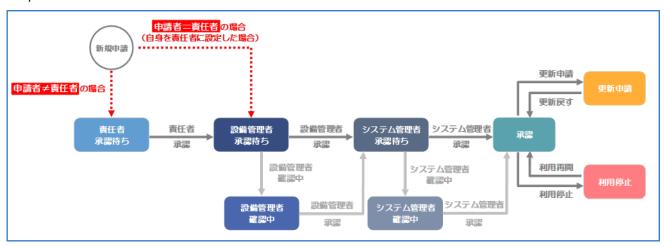
# 5. Before you book your equipment

In order to reserve a facility, it is necessary to apply for the use of the facility.

# 5.1. Status of Application for equipment usage

The status of the application for the use of facilities will be updated as follows.

You can only reserve facilities for applications whose application status is "Approved" or "Renewal Requested".



# 5.2. Applying for use from the facility

When you click the button on the facility details screen <u>図利用申請する</u>, the input screen for the facility use application is displayed.



 To apply for use, it is necessary to set a person in charge of use. When you enter identification number of the person in charge of use and click the button, the information of the person in charge will be reflected in the display field.

Also, if you have billing information, you can esponsible for use.

\* Please check the user identification number of the person in charge before entering.

(If you are responsible, refer to "12.1. Confirmation or Changing of User Identification Number" on how to check the user identification number.)



### POINT

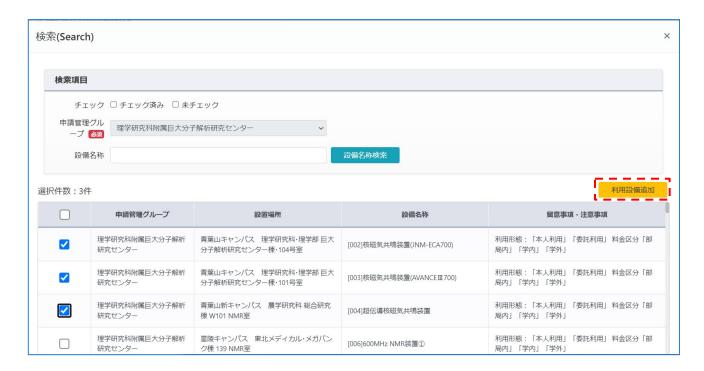
• Only accounts with billing information can be set as the person in charge.

In the "Equipment" section, you can add or delete equipment.

Click the "Add Equipment" button to open the Add Equipment modal.



On the equipment addition modal screen, check the equipment you want to use and click "Add equipment" to add the equipment to the equipment field of the application for use.



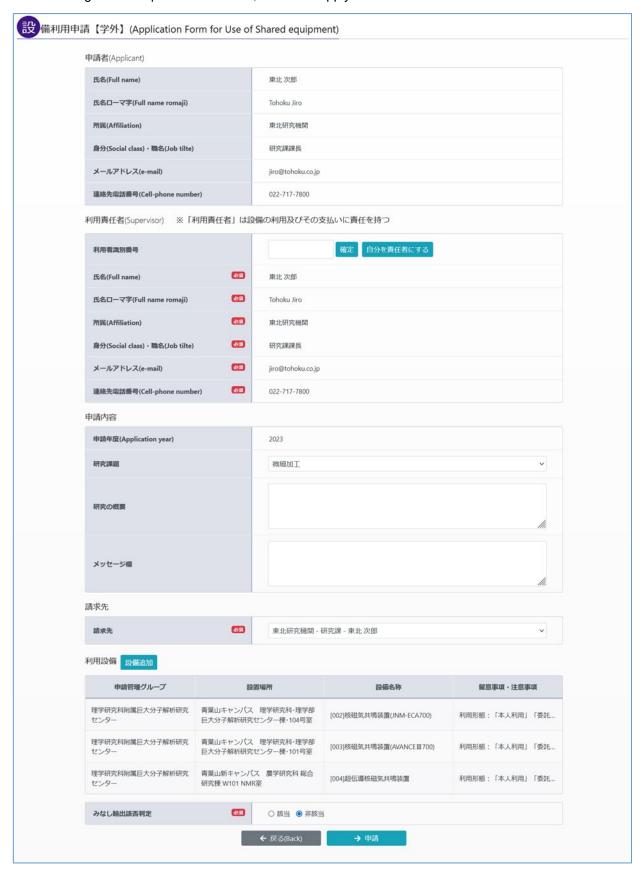


# POINT

There is no limit to the number of facilities that can be selected in one application, but only facilities in the same application management group can be selected.

• Since only the equipment selected in the equipment addition modal is displayed, if the added equipment is unchecked, it will be deleted from the equipment column.

After entering all the required information, click the "Apply" button.



If there is an input error, an error message is displayed on the screen.

入力内容に誤りがあります。 • 利用責任者を入力してください

If there is even one error, you will not be able to register a usage request.

Correct the information you entered and click the "Apply" button again.

When the application is completed, the following message will be displayed.

利用申請が完了しました。責任者(※責任者がいる場合)及び設備管理者、システム管理者が承認したら、改めて通知しますので、お待ちください。

If you set someone other than yourself as the person in charge, you will be able to reserve the facility with approval from the person in charge→ approval from the facility manager→ approval from the system administrator.

If you set yourself as the person in charge, you will be able to reserve equipment with approval from the facility manager  $\rightarrow$  approval from the system administrator.

In addition, if another user registers an application for the use of equipment with himself or herself as the person responsible, the application for use that requires approval will be displayed on the list screen, so please approve it by the person in charge.

(For the approval of the responsible person, see "<u>5.3.3. Approval of the person responsible (only the person responsible for use)</u>")

### POINT

- The "Research Project Information" that can be set on the facility use application screen can only be selected by the user's account. If you set "Research Project Information", you can set it as the default value when registering the use of facility reservations.
- Billing information can only be selected in the account of the person in charge of use. If you set

# 5.3. Operation of equipment use application

Click "Facility 

Usage Application" in the upper right menu to display the facility use application list screen.

To check the details of the facility usage application, click "Details" from the list screen to move to the details screen.

The buttons at the bottom of the details screen are displayed differently depending on the applicant and the person in charge.

▼ In the case of an applicant



▼ In the case of the person in charge (application registered by himself/herself)



▼ In the case of a responsible person (application for use in which another user has registered himself or herself as the person responsible)



# 5.3.1. Changes to the details of the application for the use of facilities

From the facility use application details screen, enter the items you want to change and click "Change".

\* The items that can be operated differ depending on the application status and authority.

# 5.3.2. Cancellation of application for use of facilities

Click "Cancel" from the facility use application details screen.

\* Canceled applications cannot be operated.

### 5.3.3. Approval of the person responsible (only the person responsible for use)

It is necessary to approve the application for use for which another user has registered himself or herself as the person responsible.

From the facility use application details screen, click "Approval of the person responsible".



The status of the application will be changed from "Pending Approval by the Responsible Manager" to "Pending Approval by the Facility Manager".

# 5.3.4. Review the results of the facility manager's approval

If the facility use application is approved by the facility manager, you can check the values such as "Immediate reservation availability" and "Fee classification" on the details screen.



Each item displays the following contents.

Approved Facilities

Whether or not you have been approved to use the facility

- \* If you are not approved, you will not be able to use the reservation
- Availability of instant booking

Can the booking be made immediately, or does the appointment need to be approved by an administrator?

3 Fee Classification

The fee category for use is either "departmental", "on-campus", or "off-campus"

4 Initial training

In the case of equipment that requires initial training, whether or not the initial training has been taken

### 5.4. Suspension and resumption of use of equipment use applications

If you no longer use the equipment for which you have applied to use the facility, you can suspend the use of it.

\* You can only suspend the use of the service by applying for "approval".

# 5.4.1. Suspension of use of equipment use application

From the list of equipment use requests, click "Stop".



When the confirmation modal screen is displayed, click OK.



The application for use and the equipment to be used that have been "suspended" will be in an invalid state, and you will not be able to register for the reservation of the facility.



# 5.4.2. Resumption of use of facility use application

If you want to reactivate a usage request that has been performed with the "Suspended" operation, click "Resume use" from the list of facility usage requests.

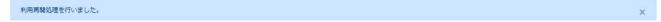


When the confirmation modal screen is displayed, click OK.



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The application is activated and operational.



# 5.5. Application for renewal of facility use application

If you want to continue to use the facilities in the next fiscal year, you will need to apply for renewal.

\* You can only apply for renewal by applying for "approval".

# 5.5.1. Application for renewal of facility use application

From the list of facility usage applications, click "Renewal Application".

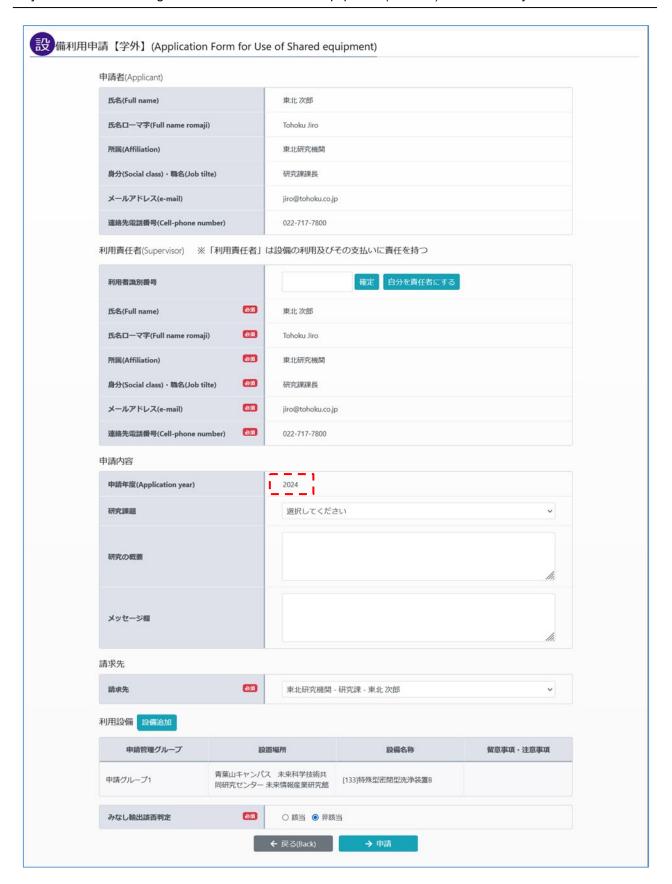
\* If you are outside the renewal application period, you cannot click the "Apply for Renewal" button.



When the confirmation modal screen is displayed, click OK.

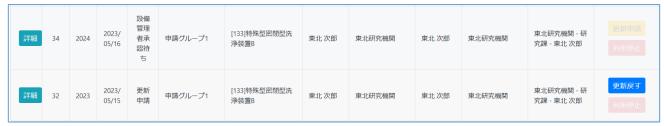


The same input screen as when registering the facility use application will be displayed, so please enter the application details for the next year.



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When you apply for renewal, the current year's application will be in the "Renewal Request" state, and a new application for the next year will be created.



In addition, since it is not possible to change the billing information or research project for a "renewal application", if you want to change it, please perform the "<u>5.5.2 Revert renewal of facility use application</u>" process.

### POINT

• Even if the application for facility use is in the "Renewal Application" state, it is valid during the application year, so you can continue to use it.

### 5.5.2. Revert an update to a facility usage request

If you want to operate a usage request for which you have performed the "Update request" operation, click "Update back" from the list of facility usage requests.



When the confirmation modal screen is displayed, click OK.

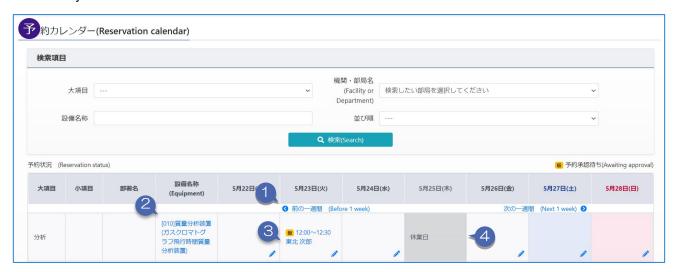


The application status will be changed to "Approved" and you will be able to perform the operation.

# 6. Until you reserve and use the equipment

### 6.1. Check equipment reservations and results

For facilities for which the facility use application has been approved, reservations and results are displayed on a weekly basis.



- ① Click "< Previous Week" or "Next Week >" to see the reservation status for the week before and after the currently displayed week,
- 2 When you click on the name of the equipment, you will be taken to the detailed information screen of the facility.
- When you click on the reservation status, the simplified display modal of reservation information is displayed.
  - If you have a reservation of your own or you are responsible, click the "View booking details" button,
  - You can display the reservation details screen.
- ④ If the facility is closed, it will be displayed as "Closed" and cannot be reserved.

# 6.2. Reservation Usage of Facility Reservations

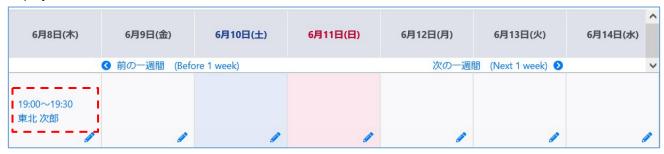
Depending on the setting of "Immediate reservation availability" in the facility use application, the reservation usage status after the reservation is completed will differ.

# 6.2.1. For facilities that can be booked immediately

In the case of facilities that can be reserved immediately, the following is displayed at the bottom of the facility reservation screen.

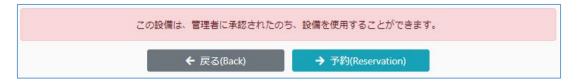


When the reservation is completed, the reservation usage status will be "Reservation Confirmed" and will be displayed in the reservation calendar as follows.

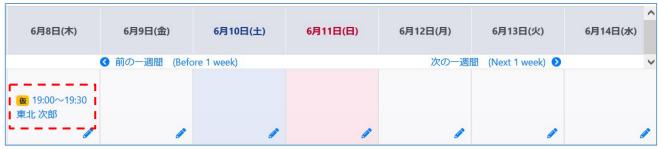


### 6.2.2. For equipment that requires approval

If the facility requires approval by the administrator, the following is displayed at the bottom of the facility reservation screen.



When the reservation is completed, the reservation usage status will be approval and a mark will be displayed on the reservation calendar.



Once the reservation is approved by the administrator, the reservation usage will change from "Pending Reservation Approval" to "Reservation Confirmed".

Also, if you change the reservation details after the reservation is approved, it will be "waiting for reservation approval" again.



Please use the facilities only after your reservation has been approved.

\* If your reservation is not approved, please contact the facility manager.

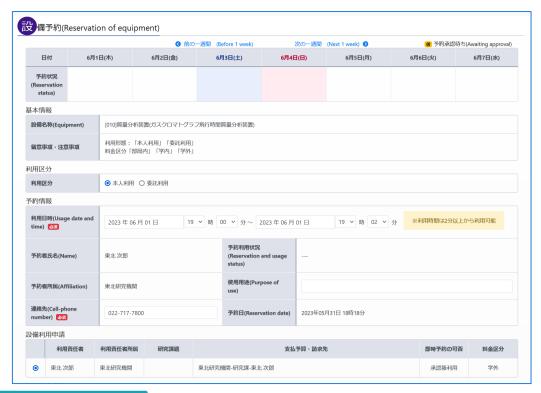
# 6.3. Make a reservation for equipment

When you click on the mark of the facility and date you want to reserve , the "Register Reservation / Usage Record" modal screen is displayed.



予約をする Click the button to move to the reservation screen.

On the facility reservation screen, enter the necessary information such as reservation information and approximate price information.



→ 予約(Reservation)

button, and if there are no errors, the configuration is complete.

If there are errors, the screen displays all the error messages.

If there is even one error, the reservation will not be registered.

Please correct or change the information you have entered, and click the "Reserve" button again.

When the reservation registration is complete, the following message will be displayed.

予約が完了しました。

# 6.4. Duplicate a reservation

In the reservation calendar, select your own reservation and the reservation details display modal will be displayed.



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When you click the "Duplicate Reservation" button, the reservation screen is displayed with the contents of the selected reservation information set as the default value.



After that, "6.3.The process is the same as "Make a reservation for equipment". Fill in the information as required.

sup

You can also duplical 複製 ervations from the button on the facility reservation list screen.

# 7. Confirmation, change, and cancellation of reservation details

In the reservation calendar, select your own reservation and the reservation details display modal will be displayed.



Click the "Reservation Details" button to move to the reservation details screen.

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You can also transitic the reservation details screen from the button on the facility reservation list

Please confirm, change, or cancel your reservation from the reservation details screen.



# If you want to change your reservation details

Change the reservation details and click the "Change" button.

### If you want to cancel your reservation

You can cancel your reservation by clicking on the "Cancel" button.

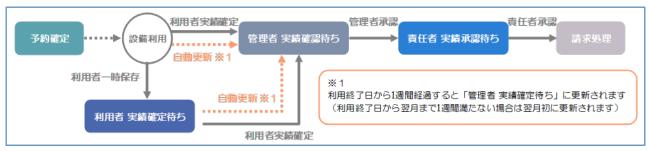
## 8. Enter your usage history

### 8.1. Reservation usage status of usage results

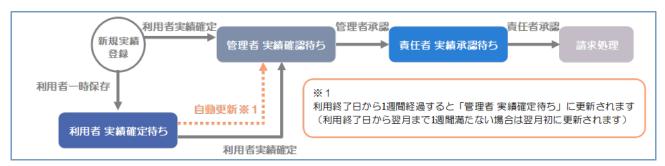
In this system, you can register usage records for equipment that has already been reserved, and new usage records for equipment that has been used without making a reservation.

The reservation usage status will be updated as follows.

### [Actual registration for reserved facilities]



### [Registration of new results for equipment used without reservation]



### 8.2. From the booking calendar

From the reservation calendar, you can register usage records for facilities that have already been reserved, and new usage records for facilities that have been used without reservations.

### 8.2.1. Enter the usage history of reserved facilities

In the reservation calendar, if you select your own reservation after the reservation end date and time, the following reservation details display modal will be displayed.



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Click the "Achievement Details" button to move to the Achievement Registration screen.



### sup

You can also transitic ## he achievement registration screen from the button on the usage record list

Since the reservation information is entered as the initial value, please change the values such as the date and time of use and the quantity as necessary.



If you click the "Confirm" button, the performance will be confirmed and you will not be able to edit the reservation details. After confirmation, it is necessary for the manager to confirm the performance and the person in charge to approve the performance.

If there is a possibility of editing the achievement again, please use the "Temporary Save" button to save the changes.

### POINT

• The usage record of "Reservation Confirmed" and "User Waiting for Confirmation of Results" will be automatically confirmed when the user or administrator operates or 7 days after the end of use date or the month following the end of use date.

### 8.2.2. Register new achievements for equipment that you have not reserved

When you click the mark of the facility and date for which you want to register the actual record , the "Reservation / Usage Record Registration Modal" screen is displayed.



利用実績を登録する

Click the button to move to the achievement registration screen.

The subsequent operation is "8.2.1.Enter the usage history of reserved facilities".

If necessary, change the values such as the date and time of use, quantity, etc., and click the "Temporarily Save" or "Confirm" button.

## 8.3. Operation from the mobile screen

From the mobile screen, you can register usage records for reserved facilities and new usage records for facilities that have been used without reservations, similar to the reservation calendar.

\* Since only facilities for which the application for use has been approved are displayed in the "Equipment List" on the mobile screen, it is not possible to register new achievements for facilities for which the application for use has not been approved.

# 8.3.1. Enter the usage history of reserved facilities

When you log in to the mobile screen, you will be redirected to the usage record list screen.

The target date of the data to be displayed is entered as the default value of the current day.



### POINT

The color of the usage record frame varies depending on the reservation usage status.

Yellow → reservation data

\* Can be edited from the first day of use.

Green → "User Waiting for Confirmation of Results" data

Editable

Light blue→ Data after "Administrator waiting for performance confirmation" \* Cannot be edited

When you click on the reservation / actual data for which you want to register the actual results, you will be redirected to the actual entry screen.



Since the reservation information is entered as the default value, change the values such as the date and time of use and the quantity as necessary, and click the "Temporarily Save" button to save.

\* It is not possible to perform the achievement confirmation process from the mobile screen.



How to use the "Get Date and Time" button

- -System for Harmonizing Academic Resource and Equipment (SHARE) non-University members manual-
- Click the "Start date and time" button to set the current date and time in "Start date and time". At the same time, "Current date and time + minimum usage time" will be set to "End date and time". If there is no minimum usage time setting, the current date and time will also be set in "End date and time".
- Click the "End 日時取得 date and time" button to set the current date and time in "End date and time".

# 8.3.2. Register new achievements for equipment that you have not reserved

Click the button at the 利用実績新規登録 top of the usage list screen to move to the equipment list screen.

On the equipment list screen, the equipment for which the application for use has been approved is displayed, so click on the new facility for which you want to register the usage record.



When you click on the equipment for which you want to register an act, you will be redirected to the actual entry screen.



The subsequent operation is "8.2.1.Enter the usage history of reserved facilities".

If necessary, change the values such as the date and time of use and the quantity, and click the "Temporarily Save" button.

## 8.4. Register usage records from the digital usage book

From the digital usage book of the shared terminal, you can register usage records for reserved facilities and new usage records for facilities used without reservations, as well as reservation calendars.

#### POINT

• The facilities that can register usage results from the digital usage book are limited for each shared terminal.

If the equipment for which you want to register usage records is not displayed in the Digital Usage

### 8.4.1. Browse the list of reservations and achievements

When you open the Digital Usage Book, you can see reservation and usage data for that date for each facility tab.



- ① The names of the facilities that can be operated from the shared terminal are displayed in a tab format. By switching the equipment tab, you can refer to the reservation and usage record information of each facility.
  - In addition, the name of the currently selected equipment is displayed below the tab.
- ② If you click the "The day before" or "Next day" button, you can refer to the reservation and actual information for the dates before and after the date displayed on the screen.
  - Also, if you click the "Today" button, reservation and performance information for the current date will be displayed.
- ③ Click the "New Usage Record" button to start "New Usage Record Registration" without making a reservation.
  - \* For details, see "8.4.2. Register a new usage without making a reservation".
- 4 When you click the "Edit" button, the "Edit Modal" is displayed.

-Sy	stem for Harmonizin	Academic R	esource and Equ	lipment (SHARE)	) non-University	/ members manual-
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- \* For details, see "8.4.3.Register usage records for reserved facilities".
- ⑤ When you click the "Cancel" button, the "Cancellation Confirmation Modal" is displayed.
  - \* For details, see "8.4.4.Revoke your usage history.

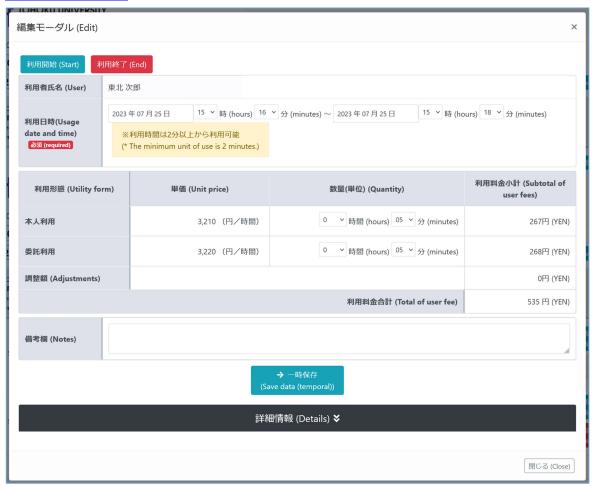
# 8.4.2. Register a new usage record without making a reservation

Open the tab of the facility for which you want to register usage history, and click the "Register new usage record" button to display the "Edit modal".



By entering your "User Identification Number" and clicking the "Confirm" button, the screen will switch and you will be able to enter various information.

\* For details of the "User Identification Number", please refer to "12.1.Checking and changing your user identification number".



<sup>\*</sup> The basic operation of each item is "8.2.1. Register the usage record of reserved facilities".

When you click the "Start Use" and "End of Use" buttons, the current date and time are entered at the start and end date and time of the date and time of use, respectively, and at the same time, the information that has been entered so far is registered in the system.

It is possible to change the date and time of use manually, but in that case, it will not be registered in the system.

When you click the "Temporarily Save" button, the information you have entered so far will be registered in the system.

When you click "Details", the input fields for "Application Information", "Billing Address (or Payment Budget)", and "Research Topic" are displayed.



Enter the project number in the "Research Topic" field and click the "Enter Research Project Number" button to reflect the research project information.

## 8.4.3. Registering usage records for reserved facilities

When you click the "Edit" button on the list screen of the Digital Usage Book, the "Edit Modal" of the reservation and performance information of the relevant data is displayed.

\* At this time, you will not be asked to enter the "user time number". The subsequent operation is "8.4.2. Register a new usage record without making a reservation".



If you click the "Edit" button to display it, you will not be able to see the information in "Billing (or payment budget)" and "Research Topic".

## 8.4.4. Revoke your usage history

When you click the "Cancel" button on the list screen of the reservation / performance of the digital usage book, the "Cancellation confirmation modal" for the relevant data will be displayed.



Enter your user identification number and click the "Confirm" button to delete the data.

## POINT

• The data that can be deleted is limited to "usage history for facilities used without reservation". The reservation date and time on the list screen is blank for the relevant data.

# 9. Change, confirmation, and approval of usage record

## 9.1. Modification and confirmation of usage results

After registering the actual results, if the reservation usage status is "Waiting for user confirmation of results", you can change or confirm the usage record.

The operation procedure is "8.2.1.Enter the usage history of reserved facilities".

### 9.2. Approval of usage record (only for the person responsible for use)

The person responsible for the use of the facility must process the approval process as the person responsible for the use of the equipment for which he or she is the person responsible for the use.

Click the "Approve" button from the usage record details screen of the usage record data whose reservation usage status is "Responsible Person Waiting for Approval of Performance".

The reservation usage status will be changed from "Responsible Person Pending Performance Approval" to "Billing Processing".

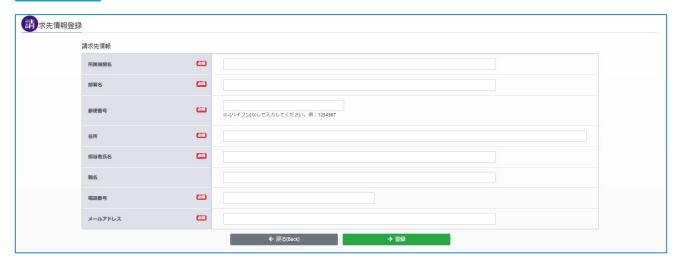
#### POINT

- · Usage records for which billing information has not been set cannot be approved.
- Only the usage record of "responsible person awaiting performance approval" can be approved.
- On the usage fee billing details screen, you can approve multiple usage records at once.

(For more information on bulk approvals, see "11.3.Batch Approval of Usage Statements". )

# 10. Register your billing address

ひ 追加する When you click the button, the billing information registration screen is displayed.



## POINT

If you register your billing information, you will be able to set yourself as the person in charge of use

### 10.1.1. Change your billing information

If you want to change the registered billing information, click the "Details" button on the billing information list screen.

After making changes, click Change to complete the change in billing information.



## 11. Manage billing data (only for the person responsible for use)

On the usage fee billing list screen, you can check the usage fee list of actual data for which you are the person responsible for use.

On this screen, you can set up billing information at once and approve it by the person in charge of use after setting up billing information.

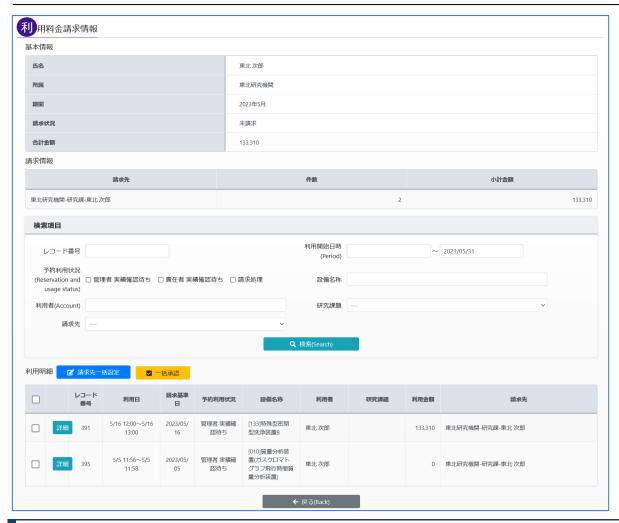
### 11.1. Confirmation of Billing

Click "Usage Fee Billing List" in the upper right menu to display the usage fee billing list.

From the list, you can check the total invoice amount and billing status during the period.



By clicking the button in the list, you will be redirected to the "Billing Information" screen, where you can check the breakdown of billing information.



## 11.2. Batch billing address setting for usage details

In the usage details column of the "Billing Information" screen, select the usage record and click the "Batch Billing Contact" button to display the Batch Billing Destination Settings modal.



After specifying the billing address on the modal screen, click the "OK" button. The billing address is set in bulk for the selected usage item.



## POINT

• For usage records where the reservation usage status is "billing processing", the person in charge of use has already approved the billing content.

### 11.3. Batch approval of usage details

If your usage statement includes the usage record of "Responsible Person Waiting for Performance Approval", please follow the procedure below to perform a batch approval in order to send it to the billing process.

(For details on reservation usage, see "8.1.Reservation Usage Status". )

On the usage details of the usage statement screen of the usage fee billing statement screen, select the usage record to be approved, and click the "Batch approval" button to display the confirmation modal.



If you click the OK button on the modal screen, the checked usage record will be approved collectively, and the reservation usage status will be changed from "Responsible Person Waiting for Actual Approval" to "Billing Processing".



#### POINT

- Usage records for which billing information has not been set cannot be approved.
- Only the usage record of "responsible person awaiting performance approval" can be approved.
- Since the approved usage record cannot be edited, please check if there are any modifications to the usage amount and billing information of the usage statement before batch approval.

## 11.4. Download the billing list

The output Excel file can be used for billing operations.

# 12. Change your account information

To check or change your account information (user information), go to 

"Change User Information" in the upper right menu and display the "Change User Information" screen.

If you need to change the information, click the "Change" button after changing the information to register.



## 12.1. Confirmation and change of user identification number

You can check and change the "User Identification Number" on the Change User Information screen.

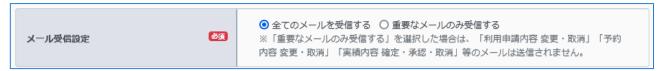


#### POINT

• The "User Identification Number" is used when setting the person responsible for the application for

## 12.2. E-mail reception settings

You can configure the settings for receiving e-mails from the system.



If you select "Receive only important emails", you will be able to receive only the following emails, and other emails will not be sent from the system.

## 12.2.1. About your own application and reservation

Application for use of facilities upon approval by the system administrator

Facility Usage Reservation At the time of registration, change, cancellation, or approval

Facility Usage Records At the time of cancellation

## 12.2.2. Application for use and reservation in which you are the person in charge of use

Application for use of equipment: When the application status is "Pending approval by the person concerned"

# 13. Registering, changing, and deleting research topics

Available research topics are created and set in the following ways:

- (1) Create a research project with yourself as the person in charge of the project.
- (2) You will be set as a project sharer for research projects created by other users.

- (3) You will be set as a project manager or project sharer in a research project registered by the system administrator.
- (3) The user can only view the data. (Cannot be changed or deleted)

sup

- Person in charge: The account that manages the research project
- Project sharer: An account that has been authorized to use the research project by the project manager

### 13.1. Browse the list of research topics

Click Research Topic List" in the upper right menu to display the research project list.

On this screen, you can see the research topics that you are available to (research projects for which you are the principal investigator or the project sharer).



## 13.2. Register a research project

Click the "Add Research Topic" button in the list of research projects to move to the new research project registration screen.



Fill in the required information and click the "Register" button to register your research project.

#### POINT

· Newly registered research projects with this function cannot be discounted for usage fees.

## 13.3. Change/Deletion of Research Topics

Click the "Details" button of the research topic you want to refer to in the research project list to move to the research project details screen.



Please confirm, change, or cancel from the research project details screen.



### If you want to change the information in your research project

Change the required items and click the "Change" button.

### If you want to delete a research project

Click the "Delete" button to delete the research project.

### 13.4. Set up issue sharers

In the list of research projects, click the "Edit [External Account]" button of the research project you want other users to use, and the project sharer setting screen will be displayed.



Click the "Change Issue Sharer" button to display the Change Issue Sharer modal.

sup

In the case of a research project for which you are not the person in charge of the project, only the list of

.....

### If you want to add issue collaborators

Enter the user identification number and click the "Add issue sharer" button to be set as a problem sharer.

### If you want to remove an issue collaborator

If you check the account you want to remove from the issue sharer and click the "Delete issue sharer" button, you will be removed from the issue sharer.

## 14. Linking research topics with results information

#### 14.1. Browse the list of achievement information

On this screen, you can see the research topics that you are available to (research projects for which you are the principal investigator or the project sharer).



## 14.2. Linking of outcome information

If you click the "Add Result Information" button in the list of results information linking, you will be redirected to the screen for linking research topics and results information.



When you click the "Add/Delete Result Information" button, the Add/Delete Result Information modal is displayed.

### sup

If you are not in charge of a research project, the "Add/Delete Results" button will not be displayed.



If you check the result information you want to link to the research topic and click the "Change" button, the result information will be linked to the research topic.

# 15. Inquiries

Center for Core Facilities, Research Promotion and Support Organization, Tohoku University Technical Support Center

Administrator: Extension:

Contact: Ext.

E-mail : terea-tsc@grp.tohoku.ac.jp

# 16. Revision History

date	ver	Updated By	What's New	remarks
2023/06/06	1.0	SRA	first edition	
		Tohoku		
2023/07/27	1.1	SRA	renewal	
		Tohoku		
2024/03/22	1.2	SRA	renewal	
		Tohoku		

