Biosciences Central Research Facility



The Hong Kong University of Sciences and Technology

New Booking System User Guide

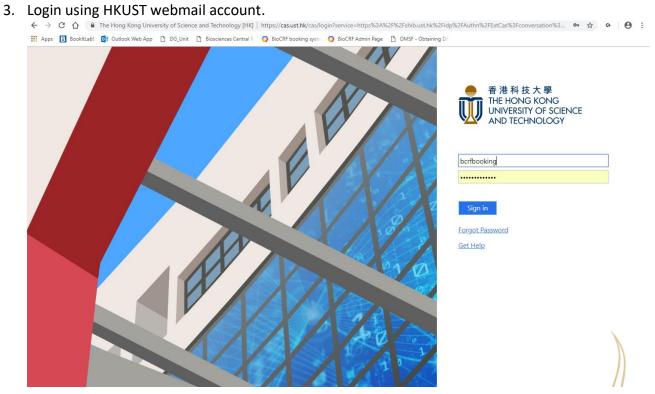
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Part 1. Registration for HKUST Users

- 1. Go to http://biocrf.ust.hk/booking.
- 2. Click **HKUST Users**.

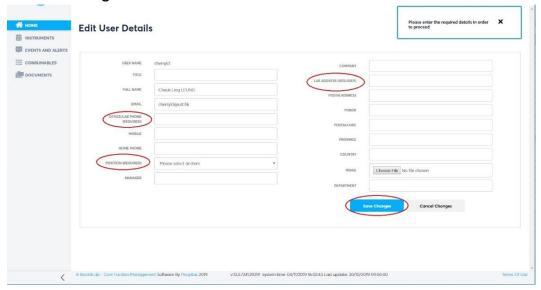




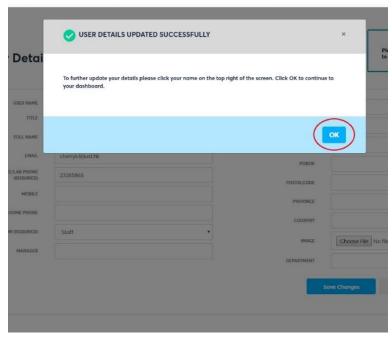
4. Type PI's FULL name (Last name, First name) → click **Submit Your Join Request**.



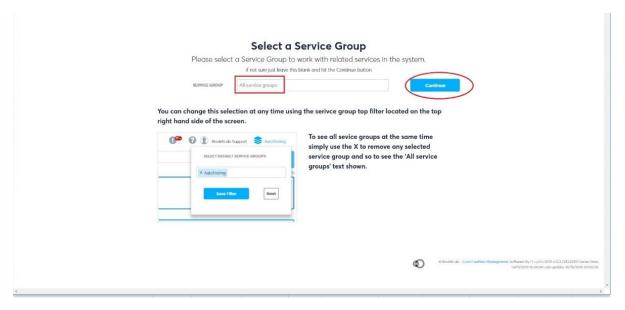
5. Provide "Office/ Lab phone", "Position" and "Lab Address" information only → click **Save Changes.**



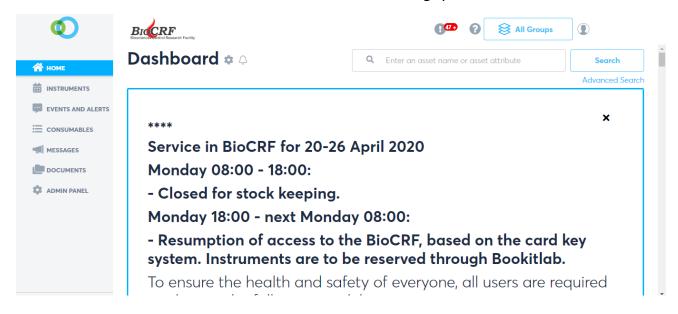
6. After clicking **Save Changes**, a message box will pop up. Please click **OK** to move to the next step.



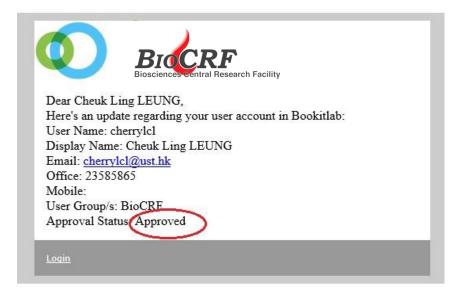
7. For "SERVICE GROUP", please keep the setting "All service groups" and click **Continue**.



8. You will then be redirected to the Dashboard of the booking system.



9. A confirmation (Registration Approval) email will be sent to you within 2 business days.



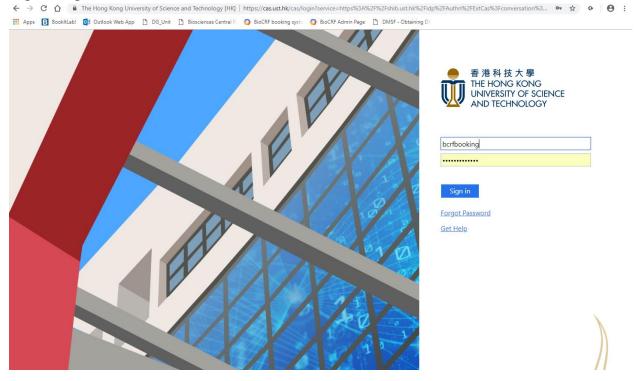
^{***} To log into the system with an approved account, please refer to the next page ***

Part 2. Logging into the booking system

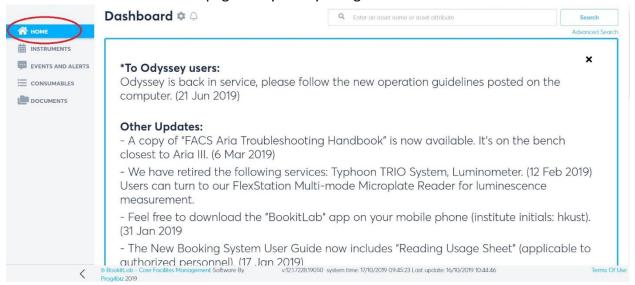
- 1. After registering for an approved account, go to http://biocrf.ust.hk/booking.
- 2. Click **HKUST Users**.



3. Login using HKUST webmail account.



4. You will be taken to the Home page every time you log in.



^{***} For instrument training reservation and cancellation, please refer to the next page ***

Part 3. Instrument Training Reservation and Cancellation

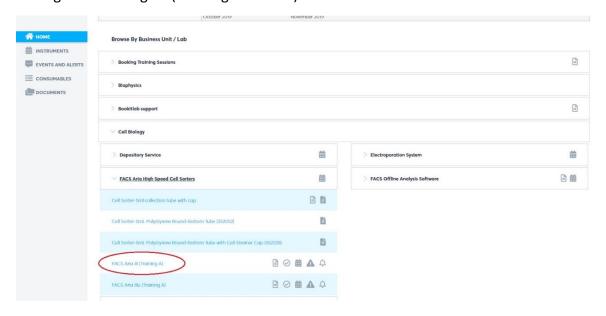
3a. Instrument Training Reservation

1. On Home page, scroll down to find the section "Browse by Business unit/lab" where lists of different services can be seen.

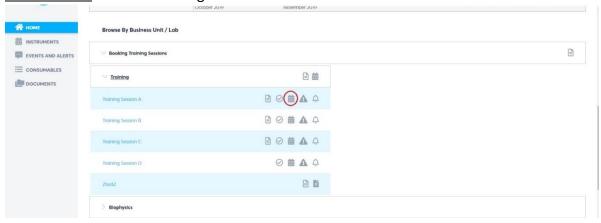


2. Find the target instrument under the proper service category by expanding the lists, check which training session the instrument belongs to – you will see Training A, B, or C right next to the name of instrument.

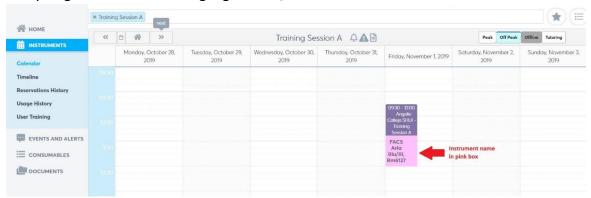
For example, to book a training session for the "FACS Aria A" Cell Sorter: Click **Cell Biology** \rightarrow **FACS Aria High Speed Cell Sorters** and note that "FACS Aria A" belongs to "Training A" (Training Session A).



3. On the same page, click **Booking Training Sessions** → **Training**, then click on the <u>calendar icon</u> next to "Training Session A".

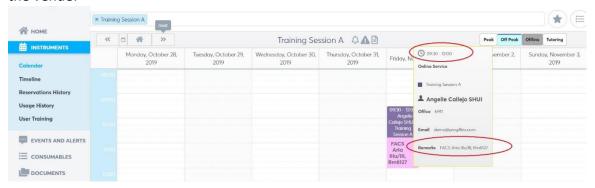


4. Look for FACS Aria A training time slots within 30 calendar days. Training sessions for every single instrument are highlighted in pink.

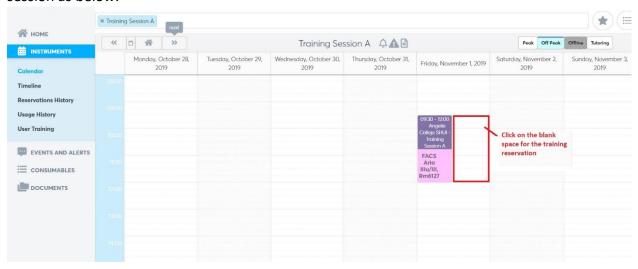


In the pink box, you can see which instrument the training session is for, as well as the training venue. If not, move the mouse cursor over the time slot. Information such as the training time and the trainer name will pop up. You can also find the instrument name and training venue next to "Remarks".

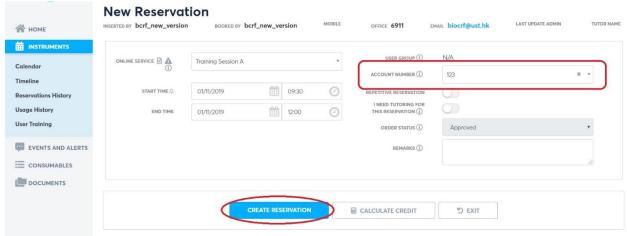
*Please make sure you have booked the proper instrument training time slot and noted the venue.



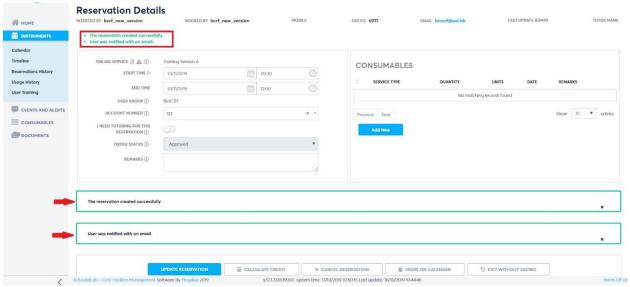
5. Make training reservation by clicking on the blank space right next to the target training session as below.



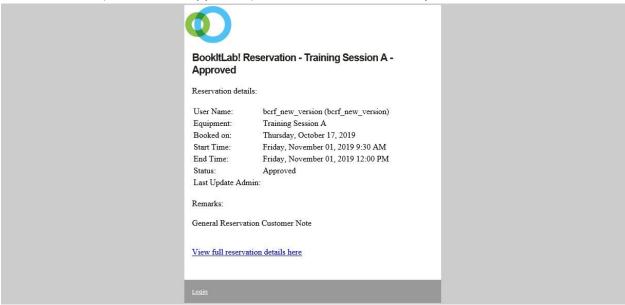
6. Select the correct "Account Number" for your lab/ group (training sessions won't be charged) → click **Create Reservation**.



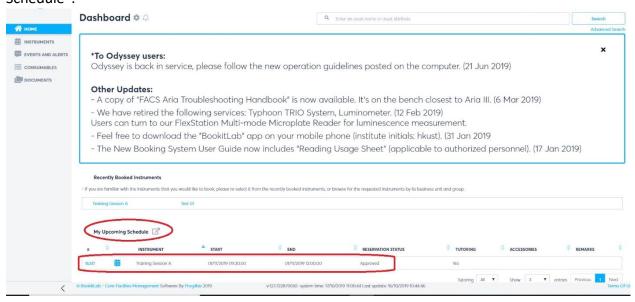
7. Upon successful reservation, a "reservation created successfully" message will appear at the top and bottom of the page.



8. A confirmation (Reservation Approved) email will also be sent to you.

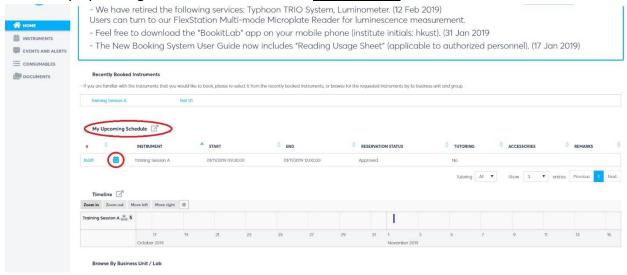


9. The reserved training session can be viewed on your Home page, under "My Upcoming Schedule".

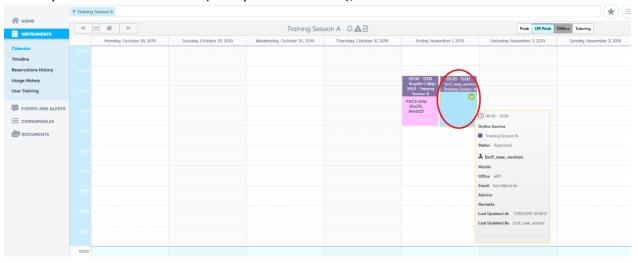


3b. Instrument Training Cancellation

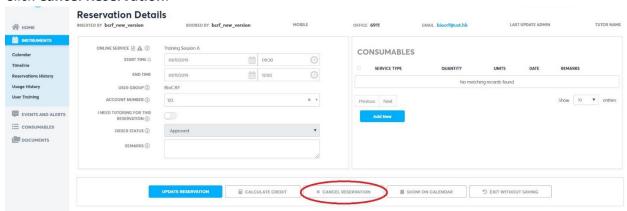
1. To cancel training reservations, go to Home page, find the reserved training session under "My Upcoming Schedule" → click on the calendar icon next to the ID number.



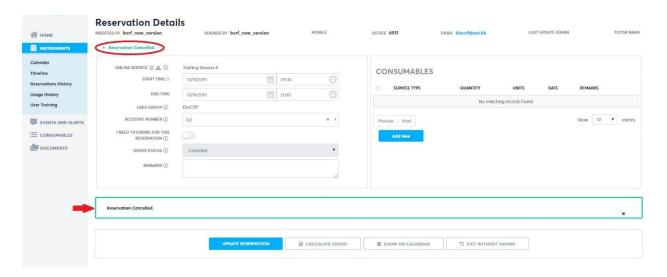
2. Locate your reserved time slot (with your name on it), click it.



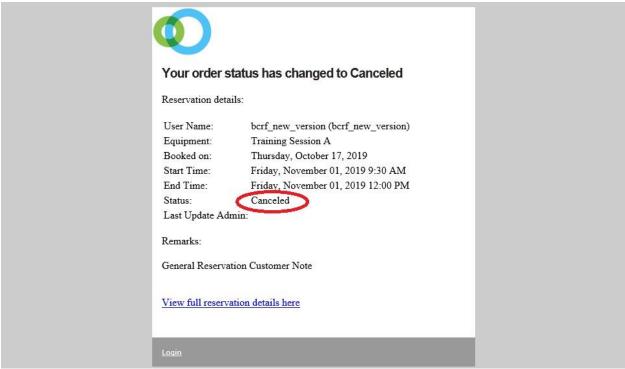
3. Click Cancel Reservation.



4. Upon successful cancellation, a "Reservation Cancelled" message will appear at the top and bottom of the page.



5. A confirmation (Order status cancelled) email will also be sent to you.

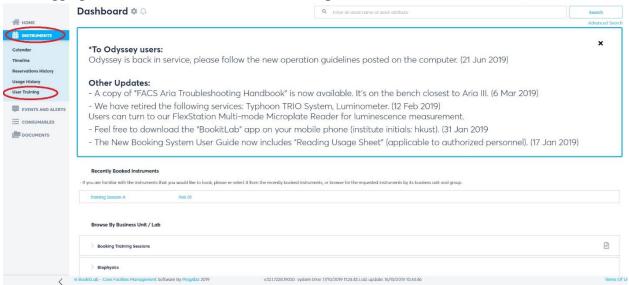


^{***} To check your access to an instrument, please refer to the next page ***

Part 4. Checking Instrument Access

After training (or evaluation), BioCRF staff will activate your access to an instrument within 2 business days, without notifying you. However, you can check which instrument you have access to, as below:

1. After logging in, click **Instruments** → **User Training**.



2. You will see all instruments your account has access to, as well as information like "Date of training", "Trainer Name" and "Level Achieved". With access, you are identified as a "Trained User".

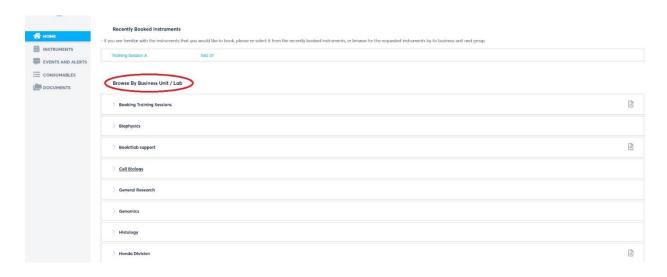


^{***} For instrument booking and cancellation, please refer to the next page ***

Part 5. Instrument Booking and Cancellation

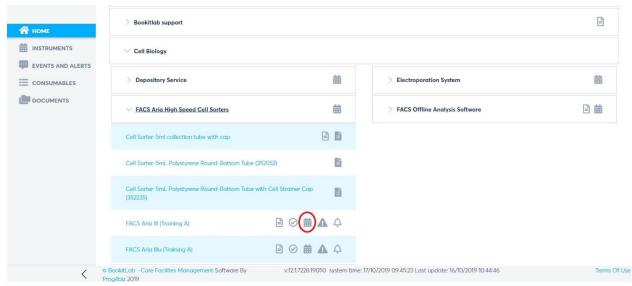
5a. Instrument Booking

1. After logging in, scroll down the page to find the section "Browse by Business Unit/lab" where lists of different services can be seen.



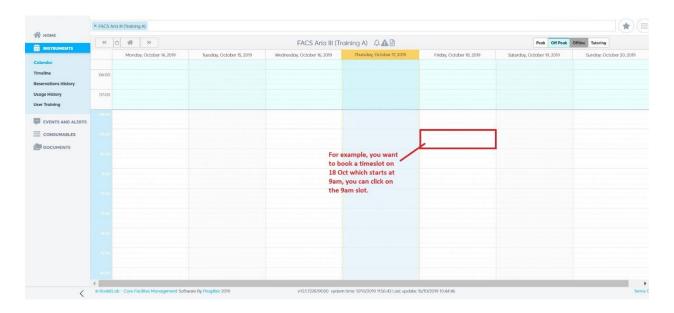
2. Find the target instrument under the proper service category by expanding the lists, for example, to book the FACS Aria A Cell Sorter:

Click **Cell Biology** \rightarrow **FACS Aria High Speed Cell Sorters**, then click on the <u>calendar icon</u> next to "FACS Aria A (Training A)".

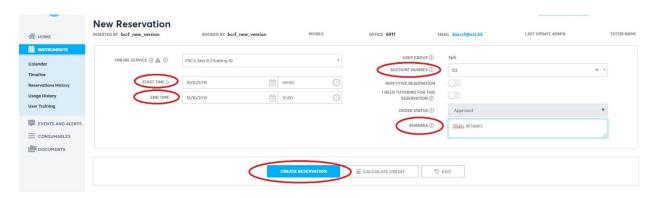


3. Book time slot by clicking on the target time slot on the calendar.

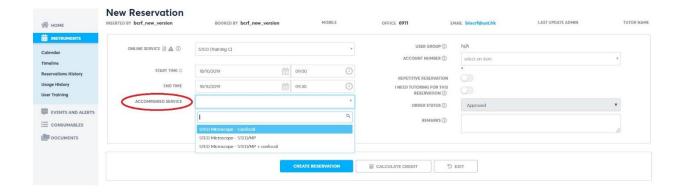
^{*}Different instruments have different booking policies as instructed during trainings, please make sure you follow them.



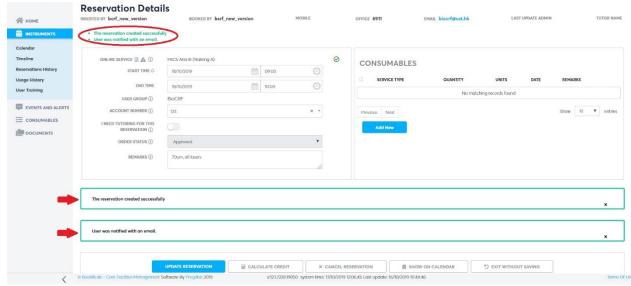
4. Select the correct "Account Number" for your lab/ group, "Start Time" and "End Time". Fill in "Remarks" if necessary, then click **Create Reservation.**



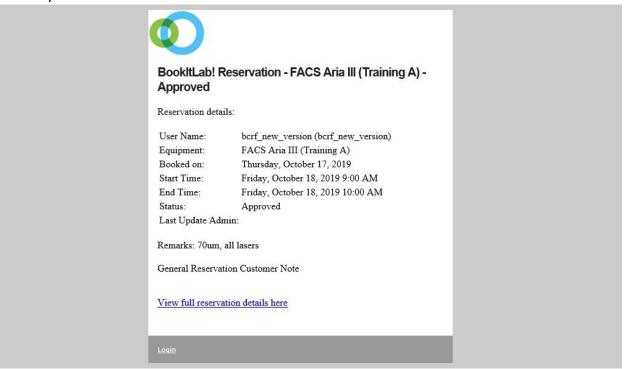
*Some instruments come with "Accompanied Service", for example, the atomic force microscope, STED microscope and Leica SP8 confocal microscope. Depending on the application chosen from the list, users will be charged differently. To make a reservation successfully, you must select one item from the list. An example is shown below:



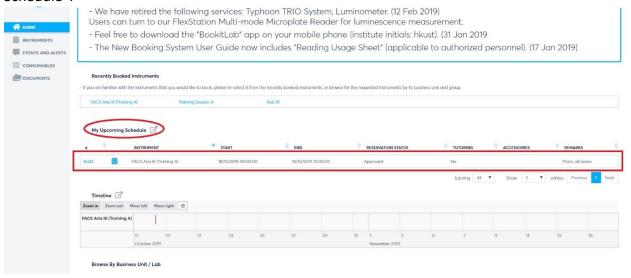
5. Upon successful booking, a "reservation created successfully" message will appear at the top and bottom of the page.



6. A confirmation (Reservation Approved) email, with details of the booking, will also be sent to you.



7. The reserved time slots can be viewed on your Home page, under "My Upcoming Schedule".

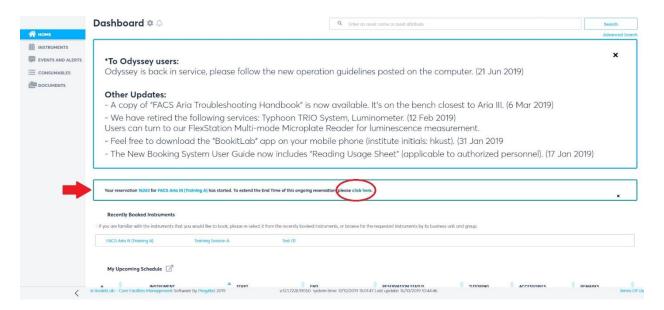


5b. Instrument Booking: Extension of Reservation time

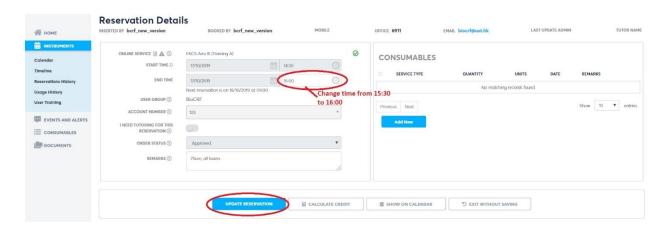
i) Ongoing Reservation

 Users are now allowed to extend their reservation duration if their ongoing experiment cannot be finished on time (only applicable when the instrument is not booked by another user).

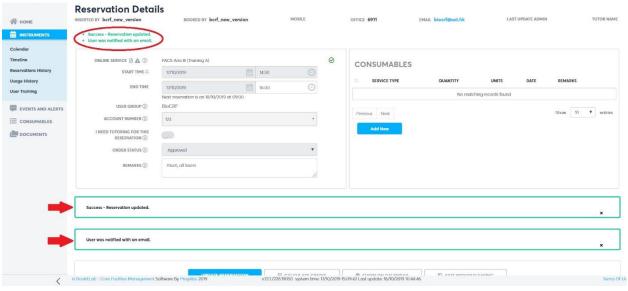
After logging into the system and reaching the Home page, you will see a statement below the Dashboard - "Your reservation (ID) for (Instrument name) has started. To extend the End Time of this ongoing reservation, please click here".



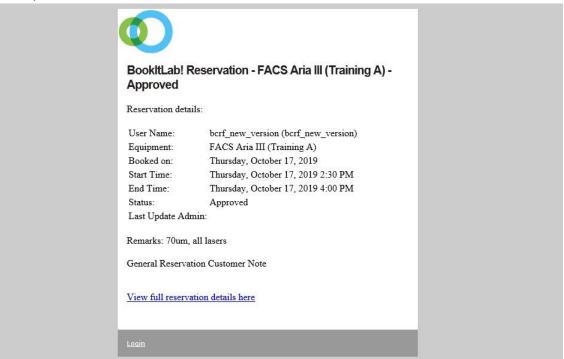
2. After clicking "click here", you will be directed to the Reservation Details page. Only the end time can be changed. In the example below, you can change it from 15:30 to 16:00. Then click **Update Reservation**.



3. Upon successful update, a "Success Reservation updated" message will appear at the top and bottom of the page.

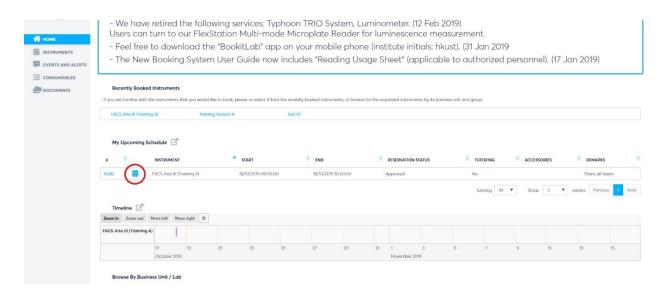


4. A confirmation email ("Your order status has changed") will be sent to you, showing you the updated End Time.

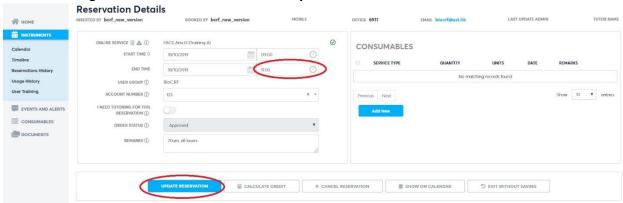


ii) Upcoming reservation

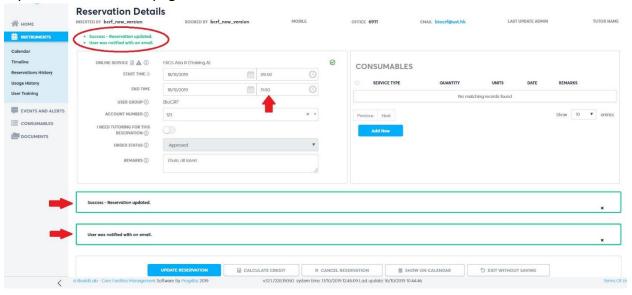
You can also extend the End time of upcoming reservations.
 After logging in, go to Home page, find the reservation under "My Upcoming Schedule"
 → click on the calendar icon next to the ID number.



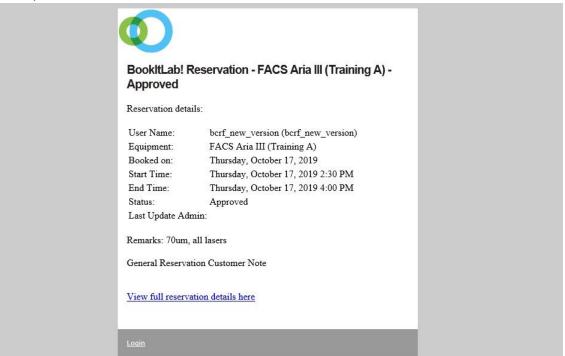
2. You can change the End time and then click Update Reservation.



3. Upon successful update, a "Success Reservation updated" message will appear at the top and bottom of the page.

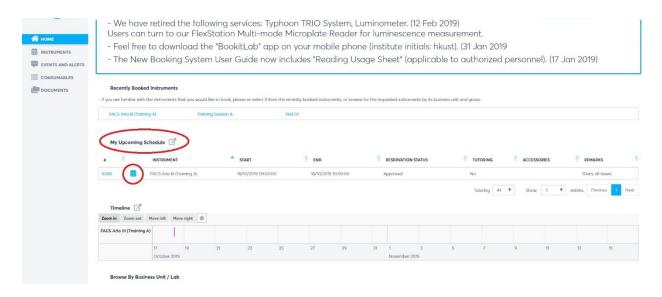


4. A confirmation email ("Your order status has changed") will be sent to you, showing you the updated End Time.

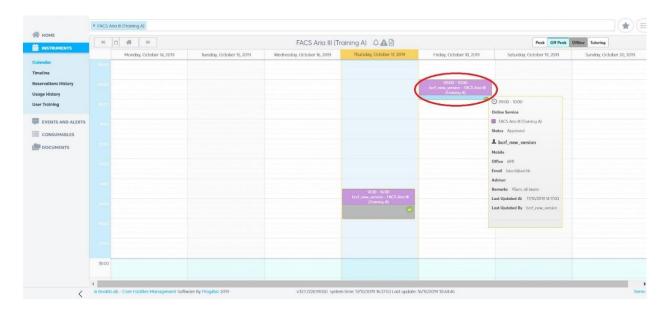


5c. Instrument Booking Cancellation

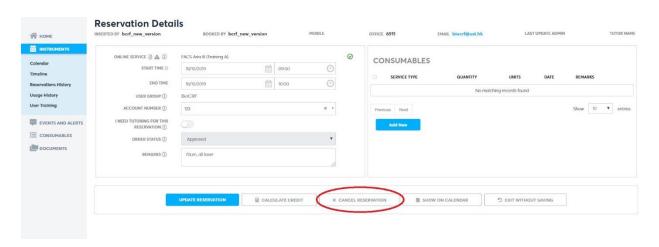
- 1. To cancel a reservation, go to Home page, find the reserved time slot under "My Upcoming Schedule", click on the <u>calendar icon</u> next to the ID number.
 - *Note that all time slots will be locked 48 hours before their start time. Users are not allowed to amend or delete their booking during the 48-hour period. Please contact BioCRF staff if booking modification is required during this period.



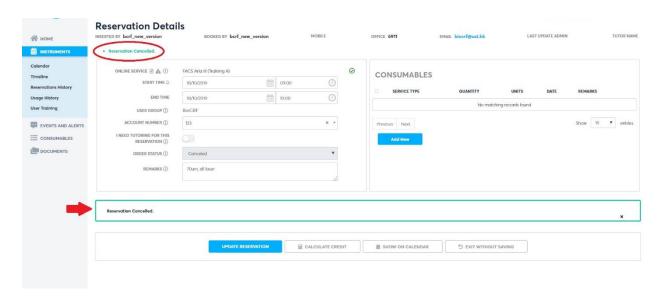
2. Locate your reserved time slot (with your name on it), click it.



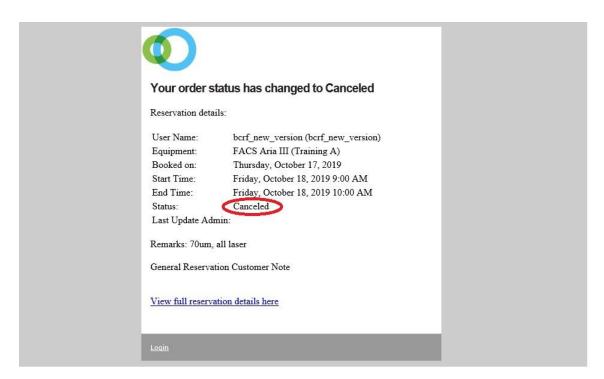
3. Click Cancel Reservation.



4. Upon successful cancellation, a "Reservation Cancelled" message will appear at the bottom of the page for a few seconds.

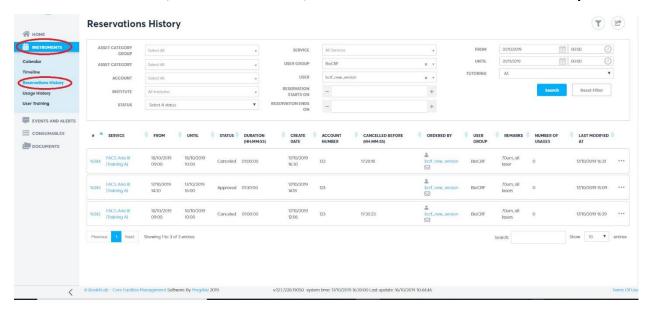


5. A confirmation (Order status cancelled) email will also be sent to you.



5d. Checking Reservations History

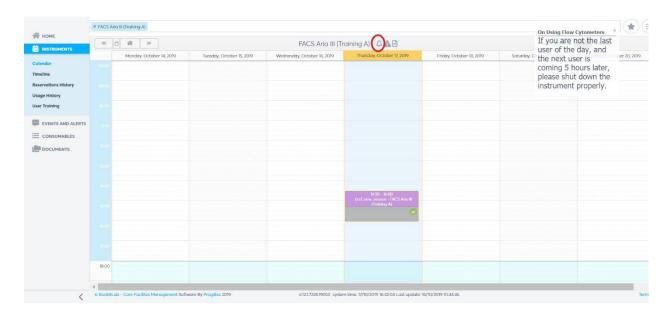
To check all reservation/cancellation records, click **Instruments** → **Reservations History**.



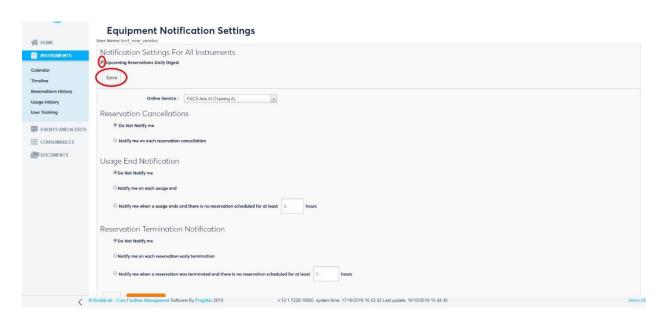
5e. Receiving Daily Booking Notifications

By following the instructions below, users will receive emails at 4:00am, only on days when they have reservations. The email will include the reservation details of all instruments a user has booked that day.

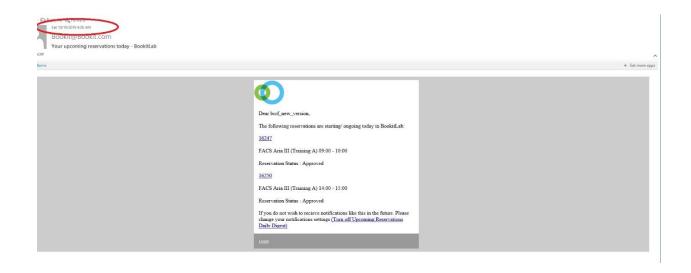
1. To receive booking notifications for ALL instruments, click **Instruments** \rightarrow **Calendar**, select any instrument on the search bar \rightarrow click the bell icon.



2. Tick "Upcoming Reservations Daily Digest" under "Notification Settings for All Instruments" and click **Save**.



3. You will receive an email with all your reservations for the day at 4:00am.

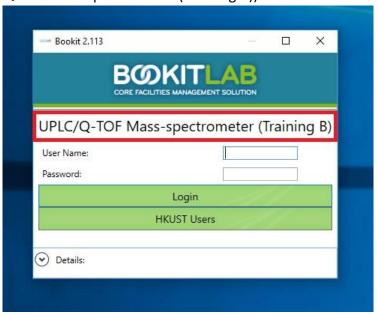


*** To use reserved instruments that are connected to a computer system, please refer to the next page ***

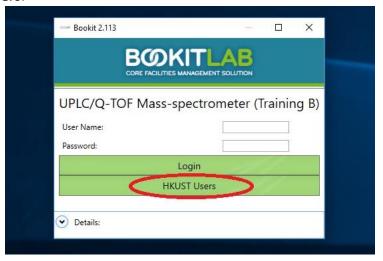
Part 6. Starting and Ending Usage of Instrument on Bookit 2.113/ 2.114

The application software of the new booking system (Bookit 2.113/ 2.114) has been installed on computers that are connected to an instrument. Users can only start using a reserved instrument by logging into Bookit 2.113/ 2.114. After use, users must log out to avoid extra charges.

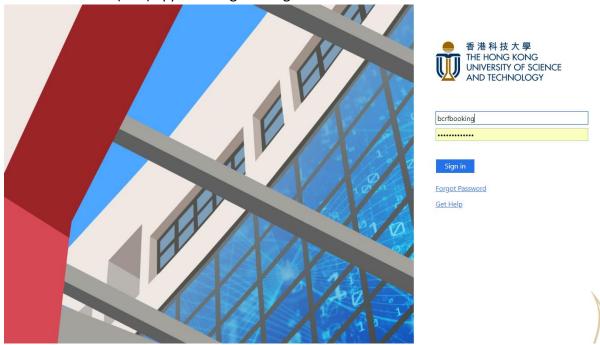
1. After logging into a computer connected to an instrument, you will see the Bookit 2.113/2.114 software window on the desktop, with the name of the instrument (for example, UPLC/Q-TOF Mass-spectrometer (Training B)).



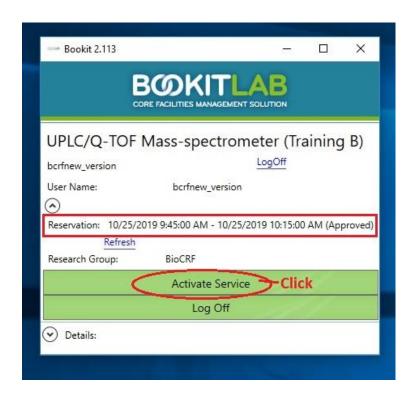
2. Click HKUST Users.



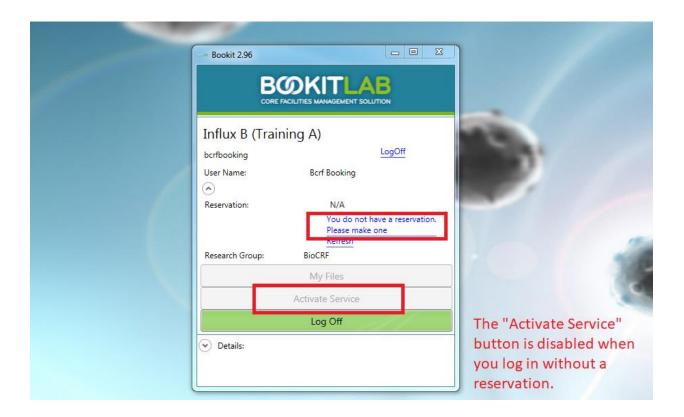
3. Another window (SSO) appears. Log in using HKUST webmail account.



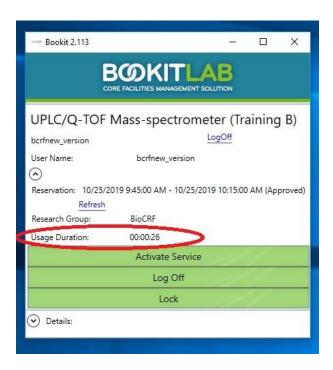
4. Bookit 2.113/ 2.114 refreshes and you will see your reservation details. Click **Activate Service**.



^{*}Note that without a reservation, you won't be able to click "Activate Service", as shown below. Please make a reservation if you want to use any instrument.

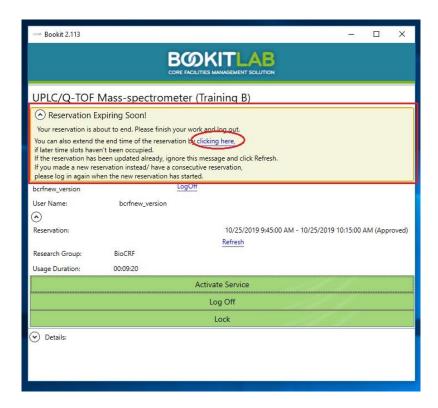


5. You can now control the desktop and Bookit 2.113/2.114 starts timing your usage.

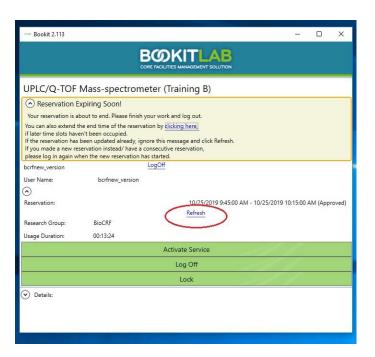


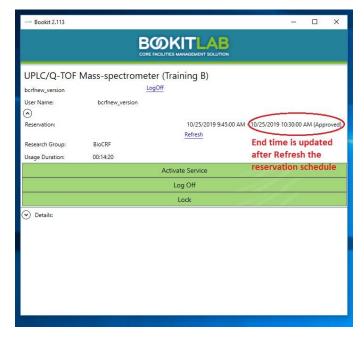
6. 15 minutes before the reservation End time, the message "Reservation Expiring Soon" message will pop up on Bookit 2.113/ 2.114. Users can extend the End time if the instrument is not being booked by another user. You can extend it by clicking "clicking here" on the Bookit 2.113 or access the Booking system through your PC or phone. For details, please refer to 5b. Instrument Booking: Extension of Reservation time.

*Note that if you cannot finish on time, please extend your time slot to continue. Users who run an instrument overtime will receive a warning. Upon receiving two warnings, users' access to the instrument will be suspended for at least a month.



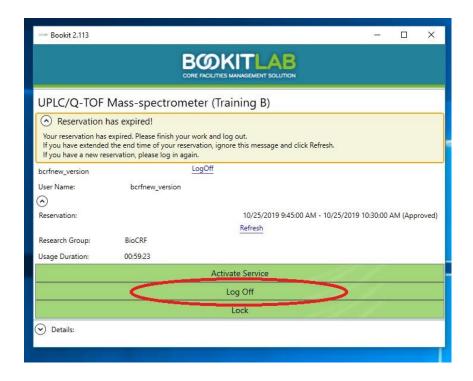
7. If you have extended the End time, you can click "Refresh" on the Bookit 2.113/ 2.114 and the time of your reservation will be updated.



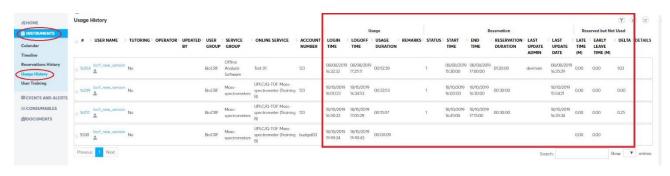


8. After you have finished using the instrument, click **Log Off**. The message "Reservation has expired!" will appear on Bookit 2.113/ 2.114 as well. If you have extended your reservation, please click "Refresh" to update the reservation time. If you have a **new** reservation, please <u>log off and log in again</u>. Otherwise, you will be subjected to **double charges**.

*Note that if you do not click "Log Off", the usage duration will continue to count the time. Extra time will be charged even if you have finished using the instrument.



 If you want to check your usage history, log into the new booking system, click Instruments → Usage History.

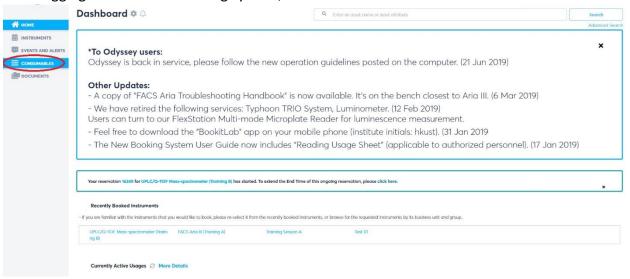


*** For reagents/consumables checkout, please refer to the next page ***

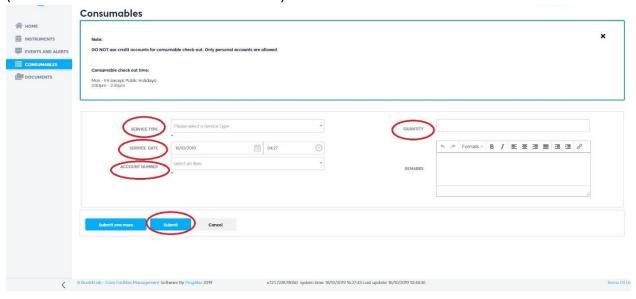
Part 7. Reagents/Consumables Checkout

On the day you want to check out reagents and consumables, please approach BioCRF staff. During checkout, you will be asked to log into the system and submit your checkout record as below:

1. After logging into the new booking system, click **Consumables**.



2. Select the correct "Service Type" (reagent/consumable checked out), "Account Number" (for your lab/ group) and "Service Date" (checkout date and time). Fill in "Quantity" (number of the item that was checked out). Click **Insert**.

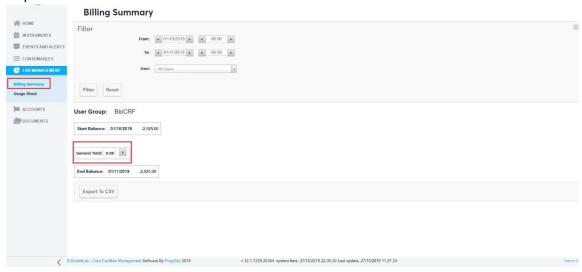


^{***} For billing management, please refer to the next page ***

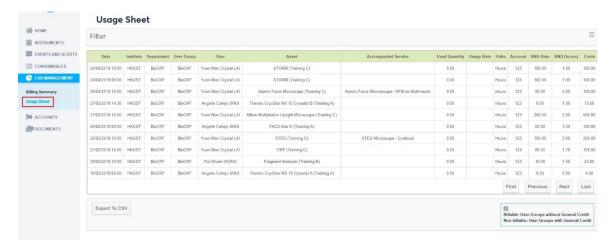
Part 8. Billing Management (for Authorized Users Only)

8a. Checking billing summary

 For total amount charged for the month, after logging into the new booking system using authorized users' account, go to Lab Management > Billing Summary, set filter as preferred.



For details of transactions, go to Lab Management > Usage Sheet.
 To understand the usage sheet, please refer to 8b. Reading Usage Sheet.
 If necessary, the usage sheet can be exported by clicking Export to CSV button.

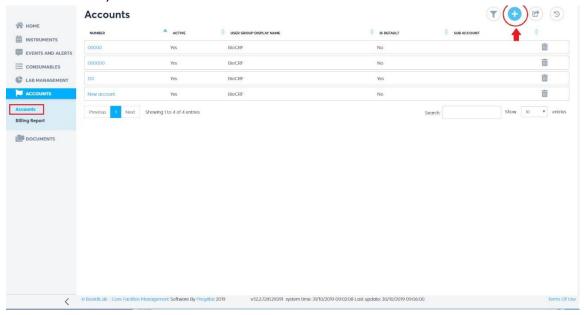


8b. Reading Usage Sheet

Terms	Definition
Date	Reservation Start Date and Time
	 Date and time logged into access control software (Bookit 2.113) (only applicable to instruments connected to a desktop computer)
Asset	· A service (e.g. protein identification)
	or · A consumable (e.g. confocal dishes)
	or An instrument (e.g. FACS Aria III)
Accompanied Service	Only applicable to instruments with multiple charging schemes e.g. Atomic Force Microscope and STED Microscope
	Take STED Microscope as an example, it has the following accompanied services: 1. Confocal 2. STED/MP 3. STED/MP + Confocal
Used Quantity	The number of consumables/items checked out
oscu Quantity	or The total usage hours*
	*Total usage hours is only applicable to instruments connected to a desktop computer. Let's say you booked an instrument from 14:00-17:00 and you logged into the access control software (Bookit 2.113) from 14:00-16:00, your "Used Quantity" would then be 2 hours. If you logged in from 14:00-17:30, your "Used Quantity" would then be 3.5 hours.
Costs	In general, Costs = (Used Quantity + RNU (hours)) x Unit Charge*
	*For Unit Charge, please refer to "BioCRF Charging Scheme" on http://biocrf.ust.hk/BioCRF/Download_Forms.html (consumable price list not included)
RNU (hours)	RNU stands for <i>Reservation Not Used</i> . Just like Used Quantity, RNU (hours) is only applicable to instruments connected to a desktop computer.
	RNU hours = Total reserved hours – reserved hours used
	Let's say you booked an instrument from 14:00-17:00 (total 3 hours) and you logged into the access control software (Bookit 2.113) from 14:00-16:00 (total 2 hours), your RNU hours would be 3 hours - 2 hours = 1 hour. To summarize, RNU hours is the reserved hours left unused.

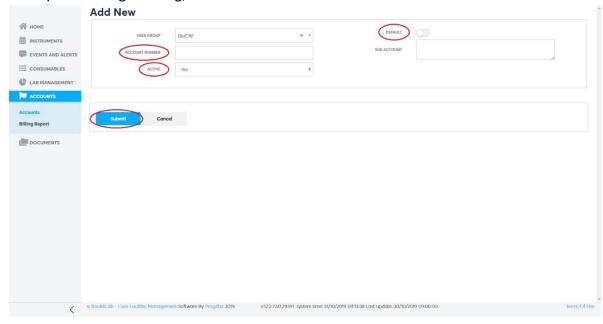
8c. Create/delete accounts

1. Go to Accounts, click Add New button.

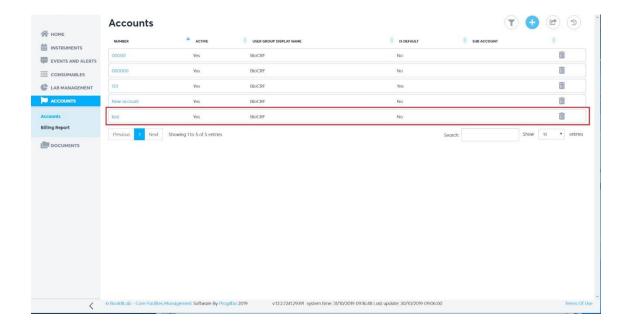


2. Key in account number, check **Active.** Then click **Insert** button.

Optional: If the new account is the major account and you want this account shown as first option during booking, check **Default**.



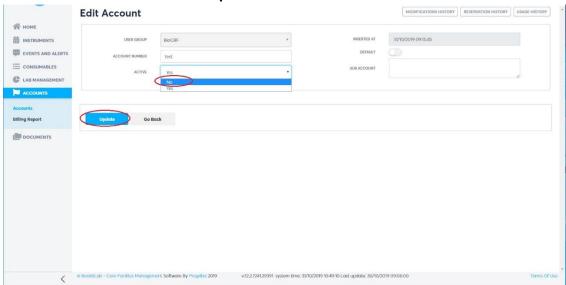
3. When you go back to the Accounts page, you will see the new account.



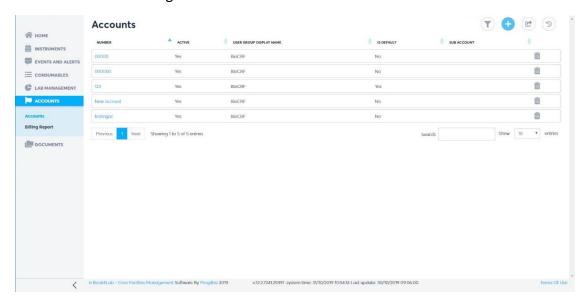
4. To delete an account, click on the account you want to delete.



5. Select "No" for **Active** and click **Update**.



6. The account will no longer be shown in the account list.



Part 9. Common Q&A

9a. Registration

1. I want to become a BioCRF user, what should I do?

Please register for an account on our new booking system. After our approval, you can start to book for training sessions. Upon completing trainings and/or passing evaluations, you will get access to our instruments.

The new booking system user guide is available on our website: http://biocrf.ust.hk/BioCRF/Download Forms.html

9b. Training and Evaluation

1. What should I do if I want to make an appointment for evaluation?

Please email the trainer for that instrument. He/she will schedule a time with you and reserve a timeslot for you. Evaluation sessions are free of charge.

9c. Instrument Reservations and Usage

1. What is the maximum reservation hour for a particular instrument?

When you make a reservation for a particular instrument, you can point your cursor over the triangle symbol next to "Online Service" (see figure below) and check its minimum and maximum reservation hours.



Please follow booking policies when you make your reservations. Your trainer should have informed you about the booking policy for a particular instrument during the training and/or evaluation.

2. I cannot delete my reservations, what should I do?

All bookings cannot be deleted 48 hours before their start time. To delete such bookings, please email BioCRF staff.

3. When my usage hours exceed my reservation hours, what would happen?

All users should start and end their experiments on time. If a user's usage hours exceed their reservation hours without extending his/her reservation, he/she will get a warning email from BioCRF staff. Upon receiving two warnings for that instrument, users' access will be suspended for at least a month.

9d. Access Control Software Bookit 2.113/2.114

1. When desktop block is ON, will the instrument software be affected?

No. If the desktop block is ON because no user has logged in OR because a user did not make a reservation, anyone will not be able to click open anything on the desktop. However, all applications that have been opened will keep running in the background.

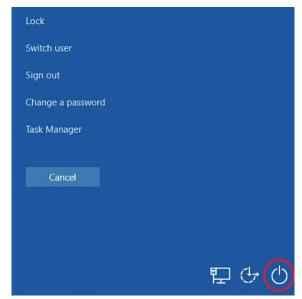
The access control software (Bookitlab) will not make any changes to any program, it just blocks the desktop to prevent users with no rights from controlling the computer.

2. I have logged onto the access control software (Bookit 2.113/ 2.114) but my usage hours have exceeded my reservation hours, what would happen?

As long as you are logged in, Bookit 2.113/ 2.114 will continue counting your usage. It will not stop any programs that are running. If you realize that you cannot finish your experiment on time, please extend your end time before it finishes if possible.

3. How can I shut down the computer when the desktop block is ON?

Hit Ctrl+Alt+Delete and select "Shut Down" from the power button menu. Before you do that, make sure you have properly closed the instrument software and mirrored/copied your data.



^{*}Depending on the Windows version, this interface will look different.

9e. Charging (Instrument Reservations and Usage)

1. How does BioCRF charge users?

BioCRF charges according to your reservation hours and usage hours.

Situation 1: Usage hours > Reservation hours

Let's say you booked an instrument from 2:00pm to 4:00pm and you could not successfully extend your reservation, so you ended up using it from 2:30pm to 4:30pm, you will be charged for a total of 2.5 hours (2:00pm to 4:30pm).

Situation 2: Usage hours < Reservation hours

Even if the hour of usage is less than the reserved amount, you will still be charged for your entire reservation. For example, if you have made a 2-hour reservation but ended up using only 1 hour, you will still be charged for 2 hours.

Situation 3: No-show

If you did not show up for your reservation, you will be charged for your entire reservation and receive a warning.

Situation 4: Did not shut down instrument properly

If you have left an instrument ON by accident when it should be shut down properly, you will receive a warning and be charged for the total hours the instrument has been left ON.

<u>Situation 5: Making a new reservation instead of extending End time of the ongoing reservation</u>

If you cannot finish an ongoing experiment, you can extend the end time on the booking system if the following timeslot is unoccupied. In this case, you only need to click "Refresh" on Bookit 2.113/2.114. But if you have made a **new/consecutive/separate reservation**, you **must log off first and then log in again**. Otherwise, Bookit 2.113/2.114 will continue to record the usage of the ongoing reservation (the session you have logged into) and you will be subjected to *extra reservation fee* (from the session you did not log into).

*** END ***