Office of the Principal Scientific Adviser to the Government of India

I-STEM
Linking Researchers and Resources

Standard Operating Procedure (SOP) for Users/Researchers: I-STEM Portal

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1. Purpose, How REACH relates to I-STEM and benefits

1.1. Purpose

This SOP defines the process for searching, requesting, approving, and using research equipment through the equipment booking portal. It establishes the responsibilities of researchers and institute accounts and introduces **REACH**, a booking framework designed to help researchers receive quicker responses.

REACH follows the same booking, approval, payment, and equipment-use process as regular booking. Its distinguishing feature is faster acknowledgement, review, and communication.

1.2. Scope

This SOP applies to all researchers and institute accounts using the portal for equipment bookings, including regular and REACH requests.

1.3. How REACH relates to I-STEM

While the baseline I-STEM portal enables national infrastructure discovery, inventory mapping, and basic booking workflows, REACH (Research & Equipment Access Collaborative Hub) represents the next evolutionary step—transitioning from passive equipment listing to an active, high-reliability operational network.

REACH brings together research parks, technology parks, industrial testing facilities, corporate R&D units, deep-tech incubators, and Centres of Excellence (CoEs) into an SLA-backed collaborative ecosystem. Designed as a two-sided enterprise network, REACH enables participating entities to act simultaneously as:

- **Service Providers**: Monetizing idle machine capacity and recovering operational/CapEx costs.
- **Resource Consumers**: Accessing specialized, high-end national testing and characterization facilities to accelerate internal R&D.

Following are the benefits the I-STEM users are able to get by REACH framework.

- Access to trusted scientific facilities.
- Broader research capabilities.
- Predictable infrastructure availability with help of SLA.
- Transparent access and pricing.
- Defined service standards due to REACH framework.
- Faster access to specialized facilities.

2. User Registration

User: Any citizen who **uses or intends to use research and testing facilities** for purposes such as experimentation, research, product or prototype development, testing, or validation.

Users can register on the portal and request to book any listed equipment for their R&D work. After the relevant Technologist approves the booking request, the user can contact the Technologist for payment and invoicing.

Steps to register as a user on the I-STEM portal:

Steps: Visit I-STEM portal ---> Register ---> User Registration ---> On the pop-up click **Yes, Proceed to Form** button ---> Fill the User Registration Form ---> Provide Captcha ---> Submit

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Register** link at the top right of the homepage.
- On the Register page, click the **User Registration** link.
- Fill in all mandatory fields (marked with *).
- Validate your Email ID using the OTP sent.
- Under **Academic Information**, choose your User Type and Institution. If institution is not listed, select 'Other' and then provide Institution Name.
- Provide Research Area details.
- Enter the CAPTCHA (case-sensitive) and click **Submit**.

Note: After registration, the user will receive login credentials by email once the I-STEM Nodal Centre activates the account. This process usually takes one working day. Only after activation, user can log in to the I-STEM portal and book equipment slots for their R&D work.

3. Login as a User

Only registered users whose accounts are activated by the I-STEM Nodal Centre can log in to the I-STEM portal.

Steps to login as a user on the I-STEM portal:

Steps: Visit I-STEM portal ---> Login ---> **Provide Login Credentials and Captcha** ---> Login

Detailed Procedure:

- Visit the I-STEM portal www.istem.gov.in.
- Click on the **Login** link which is available at top right of the homepage.
- Enter **Login Credentials (Username and Password)**.
- Enter the Captcha. Please note Username is not case sensitive, but Password and Captcha are case sensitive.
- Click **Login** button.

4. Equipment Search and Equipment Slot Booking

i. User Prerequisites

- Only registered users are allowed to book the equipment slot.
- Ensure that user's account is activated by the I-STEM Nodal Centre.
- Ensure that user's profile is completed.

ii. Equipment Search

- Equipment may be searched with/without Log in to the I-STEM portal. But, to book the equipment slot one has to login as a user.
- Log in as a user to the I-STEM portal.
- Enter the Equipment Name or its approved abbreviation (e.g., AFM) in the **Search Equipment** field located at the top left of the homepage.
- Users can use the **Advanced Search** option to refine their search results.
- Enter the Captcha; it is case sensitive.
- The search results will appear on the left side, showing the Equipment Name, Host Institute Name, and Aerial Distance (if the user's location is enabled).
- REACH equipment are shown with a crown icon on right side of equipment name.
- The search results will also appear on the map with location markers.
- Users who want to search REACH equipment mainly are supposed to do so under REACH home page only.

iii. Usage Rate Comparison

- To compare equipment usage rates User has to be logged in.
- Select two or more equipment using the checkboxes in the search results, then click the **Compare** button.
- It will display the details of the selected equipment, including their usage rates.
- User can proceed for the equipment slot booking by clicking on **Book Now** button.

iv. Reviewing Searched Equipment Details without Comparing the Usage Rate

- After searching, click the **Equipment Name** shown in the search results.
- The Equipment Details page will display the equipment status (Up/Down).
  a. A green bar indicates the equipment is Up.
  b. A red bar indicates the equipment is Down.
- It will display the **Bookable/Non-Bookable** status also.
- Click **View More** on the right side under Equipment Details to open the Equipment Info page.
- Select the usage rate for the required analysis type, and then click the **Equipment Reservation** button. Ensure your User Type is updated in your profile.
- Read the Booking Terms and Conditions carefully, acknowledge the statement, and click

Submit to complete your booking request.

v. Equipment Information and Contact Operator

- If clarification is needed before using the equipment, the user can use the **Post User Query** option.
- If available, click the **Download CSRF** button to download the **Customized Service Request Form (CSRF)**.
- Fill out the CSRF form completely, as it will need to be uploaded later during the booking process.
- The **Download CSRF** button appears only if CSRF document is updated for that equipment by Institute Custodian/Technologist.
- Click the **Next** button to proceed.

vi. Booking Calendar

- In the Booking Calendar, click on a date.
- After selecting a date, it will display Lab Facility Timing, Total Working Hours, Booked Hours, Pending Requests, Blocked Hours, and Available Hours.
- Click **Next** button.

vii. Booking Details

- Fill in **Remarks**.
- Select **Preferred Date and Time**.
- Enter **Number of Hours Required** (tentative).
- Choose **Service Type** from the dropdown.
- Choose **Pre-Experiment Support Needed** from dropdown.
- Choose **Post-Experiment Support Needed** from dropdown.
- Click **Next** button.

viii. Service Request Form

- Provide details like Job/Project Title, Hours Required, Nature of Samples, Technical Information, etc.
- Upload reference papers, CSRF (if any) or other related documents using the **Choose Files** button.
- For extra facilities, click **Yes**. Any institute provided samples (consumables, accessories, etc.) will be displayed here.
- Fill in **Current Billing Information** carefully, as it cannot be changed later; it will help institution custodian for the invoice generation.
- Click **Next** button.

ix. Booking Information

- Check the Equipment and Booking Information section.
- Click the **Book Now** button.

Note: After booking, a unique 10-digit **Facility Booking Record (FBR)** number is generated. This number is sent to the user and technologists via email. Initially, the FBR status will be **Pending**.

5. Facility Booking Record (FBR) Workflow

The **Facility Booking Record (FBR)** is a unique 10-digit number generated when a user places an equipment slot booking request.

Once generated, the FBR will be in Pending status, and an email notification will be sent to the concerned institution custodian(s), including the Technologist(s), as well as the user.

The FBR can be used to track the current status of the booking request, which may include statuses such as **Pending**, **Slot Allocated**, **Executed**, **Rejected** or **Cancelled**.

Whenever the FBR status changes, email notifications are sent to the concerned custodians, including the Technologist(s), and the user.

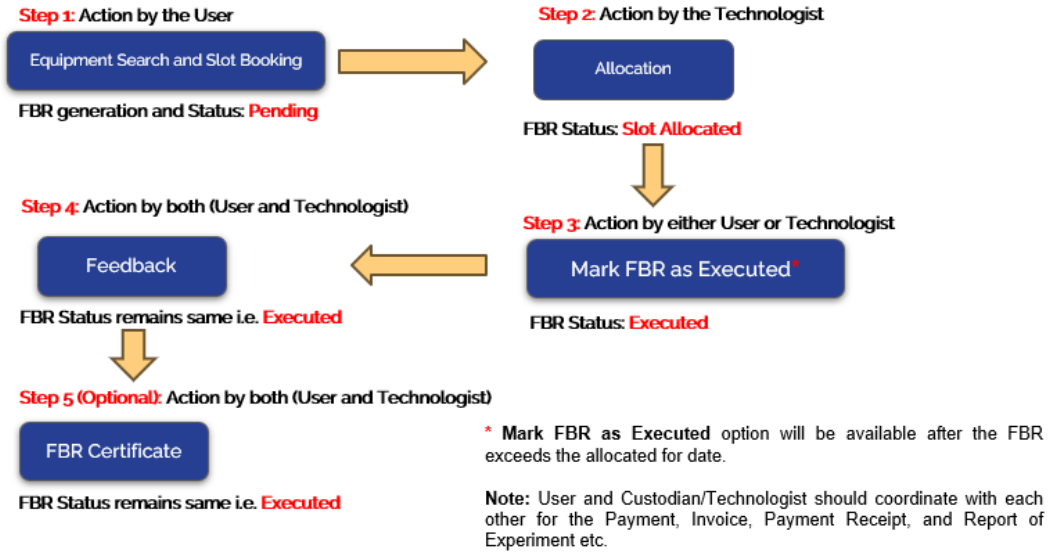
The I-STEM portal's role is confined to booking and facilitating access; data analysis should remain the responsibility of researchers. Therefore, the institutes should be encouraged to provide output data in user-friendly formats to support easier data analysis for users.

FBR Status Matrix:

Sl. No.	FBR Status	Action by User	Action by Technologist
1	Pending	Reschedule / Cancel	Allocate / Reject
2	Slot Allocated	Mark FBR as Executed / Cancel	Reschedule / Mark FBR as Executed / Reject
3	Executed	Feedback / Download FBR Certificate	Feedback / Download FBR Certificate
4	Rejected	Feedback	Reschedule
5	Cancelled	NA	NA

Note: "**Mark FBR as Executed**' option will be available after the FBR exceeds the allocated for date.

Facility Booking Record (FBR) Lifecycle



Step-by-Step Process:

Step No.	Action By	Action	FBR- Status Update
1	User	Submit an equipment slot booking request	Pending
2	Custodian/Technologist	Allocate the slot to the user	Slot Allocated
3	Either User or Custodian/ Technologist	Mark the booking request as completed (FBR Executed)	Executed
4	Both User and Custodian/Technologist	Download the FBR certificate	FBR Status remains same i.e. Executed
5	Both User and Custodian/Technologist	Provide feedback to improve the process	FBR Status remains same i.e. Executed

Note: Custodian/Technologist and User should coordinate with each other for Payment, Invoice, Payment Receipt, and Experiment Report (result of the work) if any.

Process Flow:

1. User books a slot →
2. Custodian/ Technologist allocates slot →
3. User or Custodian/ Technologist marks request completed →
4. User downloads the FBR certificate →
5. Both (User and Custodian/ Technologist) give feedback.

5.1. FBR Status: Pending (Action: Reschedule / Cancel)

Generation of FBR:

- When a user submits an equipment slot booking request, the system automatically generates a Facility Booking Record (FBR). The initial status of the FBR will be marked as **Pending**.

User Action:

- The User may either Reschedule or Cancel the booking request.

Escalation Procedure:

- If an FBR remains in Pending status for more than seven (7) working days, escalation will be initiated.
- An I-STEM representative will follow up with the concerned institute custodian(s) via email and/or phone call to ensure timely action.

To take action on a Pending FBR:

Steps: Visit I-STEM portal ---> Login ---> Login as User ---> View/Booking ---> Booking Requests ---> Click **Pending Request** in left side menu ---> Search FBR and click the FBR Number ---> Click **Edit Service Request Form** ---> Click **Reschedule/Cancel**

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Login** link at the top right of the homepage.
- Login as a **User**.
- On the home page, navigate to the **View/Booking** and click on **Booking Requests**.
- Click on the **Pending Request** in the left side menu.
- Search for the required **FBR**, then click on the **FBR Number**.
- Click **Edit Service Request Form** button under **Booking Details** section.
- Click on either the **Reschedule** or **Cancel** button. The FBR status will be updated accordingly.

To reschedule the Slot:

- To reschedule, click the **Reschedule** button.
- Fill in the required information in the pop-up and click **Update**.

To Cancel the Slot:

- To cancel the slot, click the **Cancel** button, and confirm the cancellation.

Note:
Cancelled FBR (cancelled by the user) cannot be reopened.
Rejected FBR (rejected by a custodian/technologist) can be reopened by rescheduling.

5.2. FBR Status: Slot Allocated (Action: Mark FBR as Executed / Cancel)

User Action: Execution of FBR

- Once a slot is allocated, the user should contact the institution's custodian or technologist for payment and invoice related to the FBR.
- If rescheduling is required, the user should request it directly to the technologist.
- If cancellation is required, the user can cancel the slot.
- The user can **Mark FBR as Executed** from allocated date onwards until action taken by either the user or the custodian/technologist.

Escalation Procedure:

- If an FBR exceeds **FBR allocated for date** for more than seven (7) working days, escalation will be initiated.
- An I-STEM representative will follow up with the user and concerned institute custodian(s) via email and/or phone call to ensure timely action.

To take action on a Slot Allocated FBR:

Steps: Visit I-STEM portal ---> Login ---> Login as a User ---> View/Booking ---> Booking Requests ---> Click **Allocated Booking** in left side menu ---> Search FBR and click the FBR Number ---> Click **Mark FBR as Executed / Cancel**

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Login** link at the top right of the homepage.
- Login as a User.
- On the home page, navigate to the **View/Booking** and click on **Booking Requests**.
- Click on the **Allocated Booking** in the left side menu.
- Search for the required **FBR**, then click on the **FBR Number**.
- To execute, click **Mark FBR as Executed**, then provide the following information on the pop-up page:

a. Date of Allocation
b. Date of Completion
c. Final Amount (in Rs.)

- To cancel the slot, click the **Cancel** button, and confirm the cancellation.

Note: The **Mark FBR as Executed** action can be performed by either the User or the Technologist. This option will be available from the **Date of Allocated for** onwards until the action is completed.

5.3. FBR Status: Executed (Action: Feedback / Download FBR Certificate)

- Once the FBR is **Executed**, the user can provide **Feedback** (only once).
- After submission, the feedback option will disappear and cannot be edited.
- The **FBR Certificate** can be viewed and downloaded in PDF format.

To take action on an Executed FBR:

Steps: Visit I-STEM portal ---> Login ---> Login as a User ---> View/Booking ---> Booking Requests ---> Click **FBR(executed)** in left side menu ---> Search FBR and click the FBR Number ---> Click **Feedback Form**/**FBR Certificate** button

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Login** link at the top right of the homepage.
- Login as a User.
- On the home page, navigate to the **View/Booking** and click on **Booking Requests**.
- Click on the **FBR(executed)** in the left side menu.
- Search for the required **FBR**, then click on the **FBR Number**.
- Click the **Feedback Form** button to submit your feedback.
- Click the **FBR Certificate** button to view and download the FBR Certificate.

Note:
The user should coordinate with the technologist to obtain the **Report of Experiment**.

The I-STEM portal's role is confined to booking and facilitating access; data analysis should remain the responsibility of researchers. Therefore, the institutes should be encouraged to provide output data in user-friendly formats to support easier data analysis for users.

5.4. FBR Status: Rejected (Action: Feedback)

If the equipment slot booking request is rejected by the Technologist, the FBR status will change to **Rejected**. A rejected FBR can be reopened, allowing the Technologist to reschedule the slot.

Once the FBR is **Rejected**, the user can provide Feedback (only once). After submission, the feedback option will disappear and cannot be edited.

To take action on a Rejected FBR:

Steps: Visit I-STEM portal ---> Login ---> Login as a User ---> View/Booking ---> Booking Requests ---> Click **Rejected Request(s)** in left side menu ---> Search FBR and click the FBR Number ---> Click **Feedback Form** button ---> Provide

the feedback and then click **Submit** button.

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Login** link at the top right of the homepage.
- Login as a User.
- On the home page, navigate to the **View/Booking** and click on **Booking Requests**.
- Click on the **Rejected Request(s)** in the left side menu.
- Search for the required **FBR**, then click on the **FBR Number**.
- Click the **Feedback Form** button, provide the feedback, and then click **Submit** button.

5.5. FBR Status: Cancelled

- If the FBR status is Pending / Slot Allocated, the user can cancel the slot, changing its status to **Cancelled**.
- Once an FBR is cancelled, no further action can be taken by the user or any custodian, including the technologist.
- The user can view all cancelled booking requests.

To view Cancelled FBR:

Steps: Visit I-STEM portal ---> Login ---> Login as a User ---> View/Booking ---> Booking Requests ---> Click **Cancelled Request** in left side menu

Detailed Procedure:

- Visit the I-STEM portal at www.istem.gov.in.
- Click the **Login** link at the top right of the homepage.
- Login as a User.
- On the home page, navigate to the **View/Booking** and click on **Booking Requests**.
- Click on the **Cancelled Request** in the left side menu, it will display a list of cancelled FBR.
- To view details of the cancelled FBR, click on FBR Number, then **Service Request Form** button, and then **Personal Information (User)** / **Booking Information** / **Technical Information**.

6. Disclaimer

Platform Role:

The I-STEM National Portal functions exclusively as a **facilitation platform** and does not operate as a service provider. Its principal purpose is to enable access to research infrastructure and resources. The portal does not engage in handling payments or financial transactions.

Financial Responsibility:

All financial matters—including payments, invoicing, and compliance with GST, TDS, or other statutory requirements—are to be managed independently by the host institutions. This arrangement ensures that institutions maintain full control and accountability over their financial operations.

User and Technologist Coordination:

Users and Technologist are expected to coordinate directly with one another regarding payments, invoicing, and the reporting of experiment results. The I-STEM platform does not participate in or supervise these transactions.

Resource Facilitation and Visibility:

I-STEM will continue to enhance the visibility of available equipment, foster connections among researchers, startups, and industry partners, and support the optimization of utilization and revenue opportunities for host institutions.

Platform Charges:

The I-STEM portal is offered entirely free of charge to both institutions and users.

7. Issue Handling and Customer Support

Efficient issue resolution and timely support are vital for the seamless functioning of the I-STEM portal. To ensure effective assistance, I-STEM employs a dedicated ticketing system (Freshdesk) and provides multiple support channels to address user needs at all levels.

Support Channels:

Users may contact I-STEM support through the following channels:

- **Toll Free Helpline:** Available during working hours for immediate assistance and quick clarifications.

  Toll Free No.: 1800 425 3281

- **Email Support:** For detailed queries requiring attachments such as screenshots.

  Email Id: support@istem.co.in

- **Support Ticketing System (Freshdesk):** The preferred channel for structured issue logging, tracking, resolution, and escalations.

  - All issues, whether technical (e.g., login problems, booking, feedback) or operational, must be logged through the I-STEM Freshdesk system.
  - Each ticket is assigned a unique reference number to ensure tracking, accountability, and timely resolution.
  - Users are encouraged to provide complete details, including screenshots or relevant documentation, to facilitate faster and accurate support.

  Raise a ticket here: https://istem.freshdesk.com/support/home

  Visit the I-STEM portal at www.istem.gov.in ---> Click on **Contact Us** in the header section of the homepage

8. QR Codes to Explore the I-STEM Stakeholder Kit & YouTube Playlists

Scan the QR Code to **Explore** the I-STEM **Stakeholder Kit**

The I-STEM Stakeholder Kit contains resources designed to help custodians/technologists and users better understand I-STEM portal operations. It includes the User Handbook, Operator Handbook, brochures, one-pagers, SOPs and guidelines, videos, and PPTs (demonstrations).

Scan the QR Code to **Explore** the I-STEM **YouTube Playlists**

The I-STEM playlist contains YouTube videos that guide custodians/technologists and lab management (institutes) in understanding all processes they need to follow to maintain proactive lab management and manage user requests for equipment. It also explains how users (researchers, start-ups, industry, and MSMEs) can use the I-STEM portal, including how to search for and book equipment.