

## Tips for Getting Started with LabArchives

LabArchives is a flexible platform with endless possibilities for customization to match your existing workflows and data management requirements. LabArchives allows you to securely store, search, and share your data. With LabArchives, you can organize your data and use the access management tools to work with your team, your clients, and external collaborators.

### Tip #1: Create Notebook Policies & SOP's

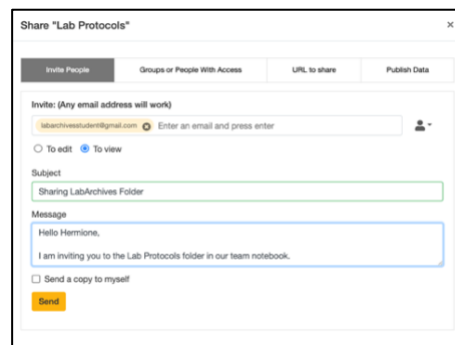
Creating consistent strategies and methodologies across users and teams that will be using LabArchives is an important step, and as you use LabArchives you may want to periodically review and discuss notebook policies. This will increase efficiency, promote better communication, and provide improved management, and client oversight. Keep in mind these policies can be modified anytime in the future as you find what works best for your teams. Here are items to consider:

- Do we have any company, partner, or client policies that we need to consider?
- Should we organize data by project, client, date, user, application, or piece of equipment?
- Do we need to standardize pages or folders in the notebook?
- Should we create standardized formatting and structure and create custom templates?
- Should we use page signing or witnessing to indicate the final version of a page?
- Should we change the way we are formatting or storing data?
- Do we need to create a standardized list of tags to be used in the notebook?
- Do we currently have, or do we need to create standardized metadata or naming conventions for files, folders, sub-folders and pages?
- How should we handle large files or data that is stored in another location?
- Do we need additional devices or software to access LabArchives?
- Do we have current data and files that need to be migrated? See [LabArchives Folder Monitor](#) for more details on data migration assistance.
- How do we handle preexisting data that will continue to be stored externally?

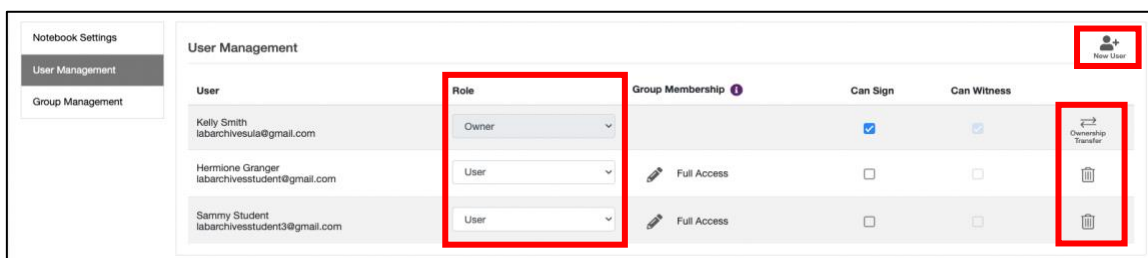
### Tip #2: Share Your Notebooks

One of the most helpful and powerful features of LabArchives is its ability to share data. You can share data with individuals in your group, with collaborators, and clients. You can setup custom permissions for each notebook, folder, page or entry and you can change an individual's or a group's access rights at any time. An individual and group can have **Can Edit**, **Can View**, and **No Access** rights applied to different parts of a notebook and they can have a different **User Role** in each notebook.

You can manage access to the data with [User Management](#), [Group Management](#), [Manage My Account](#), and you [can share portions of a notebook](#) from the Notebook Navigator.



Typically, the CSO, Department Manager, Senior Management or Founder owns all notebooks, and each member of the team has **User** or **Administrator** rights to the appropriate notebooks.



Some things to consider when planning notebook access:

- Who should own notebooks?
- Who should be able to share data with others?
- Should we share data with external collaborators or clients?
- Should we make data publicly accessible?
- Should everyone have access to all data or should we setup custom permissions based on project or user?

## Tip #3: Organize Your Data

LabArchives allows you to create unlimited Notebooks, each of which is a separate entity. Each Notebook is divided into Folders, sub-Folders, Pages and Entries, much as the file system on your computer. You can rename or move data in the folder structure. Overall, the organization of your Notebook should be tailored to your organization's needs.

### Individual Notebook

- Many teams will create one notebook for each member of the team. You can create a standard notebook for each person.

### Project or Client-based Notebook

- Some teams will organize notebooks based on projects they are working on or the clients they are working with. All data associated with that project would be stored in this notebook and everyone associated with the project would have access.

### Shared Resource Notebook

- Most teams create a notebook that is shared with everyone. This notebook could contain Lab Protocols, Safety information, weekly meetings, or policies in the lab. This is a great way to quickly share data with everyone.

### Instrument or Application-based Notebook

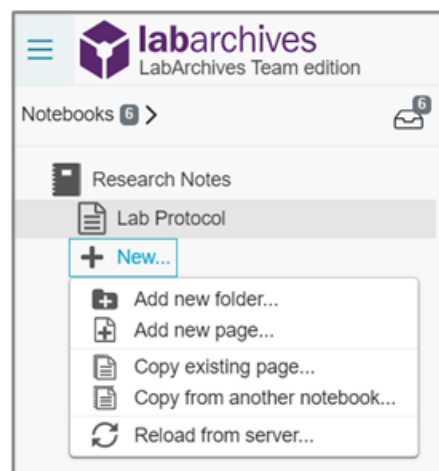
- You may want to create a notebook for a shared piece of equipment, or a common application performed. With [LabArchives Folder Monitor](#), files generated on a piece of equipment could be automatically uploaded to LabArchives.

### Date-based Notebook

- You may want to organize your notebook by date. You can create folders for each month or year and add pages for each day or week. This can be a great way to document things like equipment calibration information.

### Template Notebooks

- To standardize a notebook or procedure across everyone on your team, you may want to create templates. Templates can help you maintain consistency and reproducibility across all members of the team.
- Some teams build a standard folder structure and use the [Clone](#) or [Copy from Another Notebook](#) tools to create multiple notebooks with the same structure.
- You can create template pages using several preformatted entries. Each user can select [Copy existing page](#) to use that template.
- Some teams build custom [Widgets](#) for the lab notebook. Widgets are simple HTML forms that can be used by the entire team in all notebooks.



## Tip #4: Add Protocols, Safety Information, and Data

Anyone with edit access to the lab notebook can add new entries to a page or edit existing entries. You can add **Rich-text** entries, **Headings**, and **Attachments** of any file type. Your notebooks could contain lab protocols, safety information, manuscripts, important files, photos, data from hardware and software, as well as any other data that you need to record.

### Add Text to Your Notebook

You can add text to your lab notebook using a [Rich Text](#) entry, [Heading](#) or [Plain Text](#) entry. Rich text entries support text formatting like highlighting, font size, and you can add tables to the entry. A heading can be used to quickly break up a page. A plain text entry can be used to display code like markdown in your lab notebook.

### Add Attachments to Your Notebook

You can add attachments of any file type to your notebook. You will see a thumbnail for any file saved and there are viewers for Office documents, PDF's and Images.

- **Microsoft Office Documents:**

With an Office 365 license, your team can edit Microsoft Office documents by using Office Online. Office Online supports simultaneous editing, and your edits will be saved automatically. You can also open files on the desktop version of office using the [Microsoft Office Plugin](#), which enables a direct connection between Office and LabArchives for creating, opening, editing and saving files in one location.

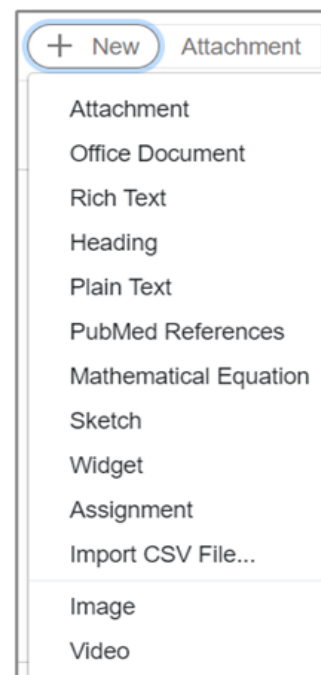
- **Images:**

You can annotate images in your lab notebook using the [Image annotator](#).

### Manage an Inventory or Build Custom forms with Widgets

Widgets are customizable, interactive HTML forms or applications. Widgets can be tailored for your specific experiment and application and contain interactive text boxes, buttons, drop-down menus, and more.

With LabArchives, you can use [built-in widgets](#), manage inventory through a [database or freezerbox widget](#), or create your own widget with [The Widget Manager](#).



## Tip #5: Promote Data Provenance and Reproducibility

It's becoming increasingly difficult to find the original source for some data. LabArchives has several tools to promote data provenance within your organization. It's also important to discuss the principles of reproducible data as you develop notebook policies and workflows.

### Version Control

LabArchives maintains a complete revisions history for every entry and page. Each revision is stored with a timestamp generated by the National Institute of Standards and Technology. You can always revert to a [previous version](#) of your data or undelete an item.



### Search your Notebook

You can use the [search](#) and advanced search functions across all notebooks in your account or you can search through a specific folder. You can enter Boolean (i.e. "AND", "OR", and "NOT") logic, literal phrases, and much more. You may want to develop a standardized file naming convention or use [Tags](#) to improve the search results.

### Link to Other Data

You may want to connect data stored in another location to your notebook. You can link to data stored in LabArchives, to a web address and to a local file. Many teams will add [Entry links](#) to connect data with a specific version of a protocol. Some teams will add a [Share URL](#) to connect data stored in another location to a specific page or entry in the lab notebook.

### Manage Activities in the Notebook

Your team can easily see recent changes to the lab notebook using the [Activity Feed](#). This provides you with a chronological view of all logins, edits or deletions. You can also find all entries created or edited by a specific user or all entries made in the last Day, Week or Month using the [Notebook Dashboard](#).

### Communicate with your Lab Members

You can communicate directly with members of your team using [Comments](#). To alert a specific individual, use @ mentions. Comments can be added to any entry and you can receive [email notifications](#) or Activity Feed notifications about comments made in the notebook.

## Additional Help and Support Resources

While in the LabArchives Notebook, find help through the **Information** icon and visit the [Knowledgebase](#) to browse by support topic, view [Video tutorials](#) or submit a question directly to our [Support team](#). Register for one of our [Weekly webinars](#) to attend a live training session hosted by a LabArchives trainer.