



Notebook Setup and Administration

LabArchives Research Edition ELN

The LabArchives ELN is a secure, digital notebook that makes it simple to record, organize, analyze, and share experiments and data wherever you are. Boost your productivity and data availability by consolidating all of your workflows, methods, and findings onto an accessible, secure, cloud-based platform. We recognize that we have a significant responsibility to protect and secure your data, which is why our application undergoes annual external audits.

Typically, the Principal Investigator (PI), project lead, lab manager, or an administrator will create the LabArchives Notebooks and invite their team members. Project notebooks, lab-wide notebooks, and department or organization notebooks are common notebook structures used to help teams centralize documentation and streamline data access.

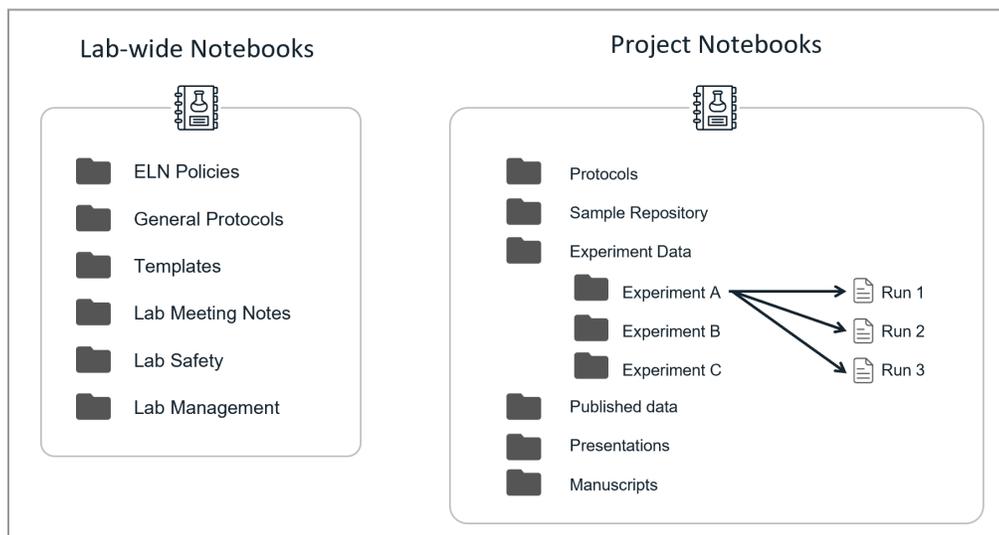
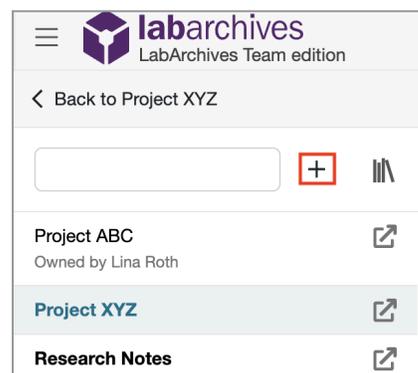
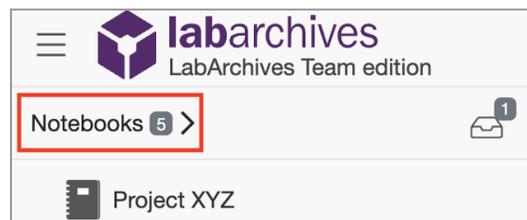
support@labarchives.com

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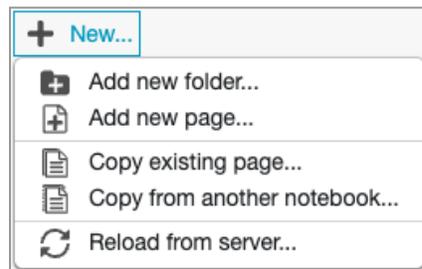
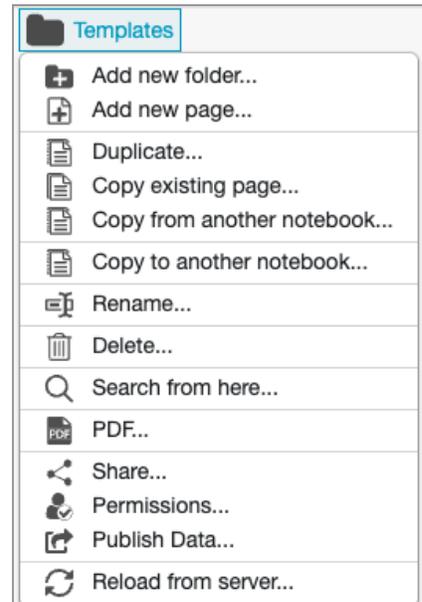
Create a Notebook and Customize the Structure

When you create your account, a notebook called **My Notebook** will be automatically created. You can use this default notebook or create your own notebooks. If you do not have Notebook creation privileges, you should wait for an invitation to join a Notebook.

- To create a new notebook, click **Notebooks** to view the list of notebooks and click the **+** icon to create a new notebook. Name your notebook, select a folder layout, and click **Create Notebook**.
- When choosing the folder layout, keep in mind that you can further edit and modify the layout at any time.
- If choosing to customize your layout, consider a project notebook structure where folders are organized by experiment type and each individual page represents one run of an experiment. Also include folders for protocols, sample registries, or project management.
- The lab-wide or lab-based structure can be used to organize shared materials to include things like administrative resources, ELN policies, protocols, and templates.



- Each notebook can be organized through a system of pages and folders. Many research teams will create a standardized notebook structure used in all team notebooks.
- You can create a new page or folder in a selected notebook by clicking **+ New**. All folders and pages can be moved by using drag and drop within the notebook structure.
- Right click (Ctrl + Click for Macs) on the folder or page name for options like renaming, deleting the item, or duplicating a folder or a page. If you delete a page or folder, it can always be recovered in the deleted items folder.
- You can even copy content over from another notebook (such as another notebook that may contain protocols or other shared materials). Choose **Copy from another notebook** and then select the content that you wish to add to the current notebook.

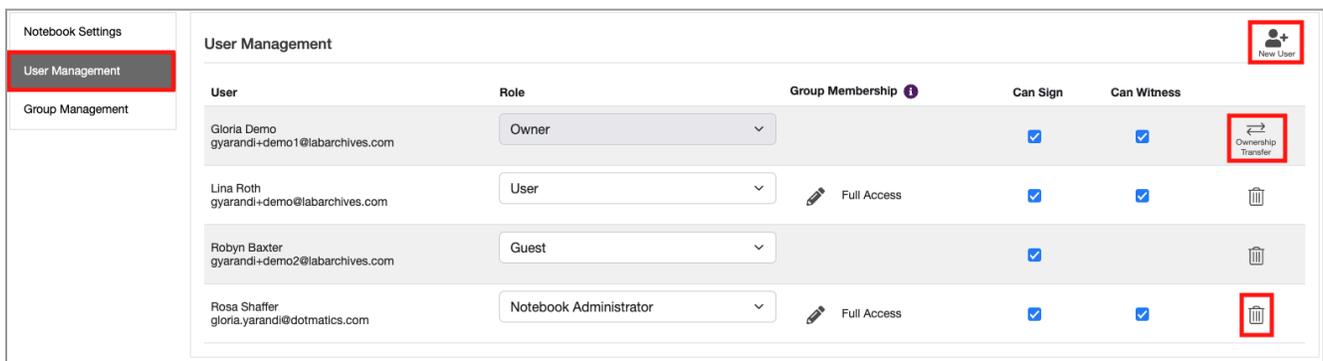


Share Your Notebook with Team Members

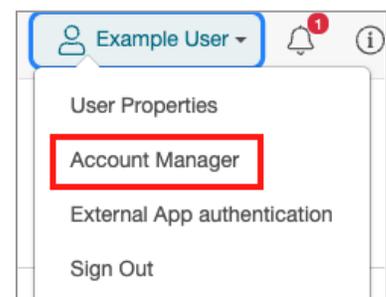
As the Notebook Owner or Administrator, you can share anything from a single entry to the entire notebook with other team members. You can also set up custom permissions in the notebook.

By default, only the owner can see the content in the notebook until other members are invited to the notebook. Each notebook member is assigned a role: Notebook Owner, Account Administrator, Notebook Administrator, User, or Guest.

- To manage users in a notebook, click the triple dot menu on the top right, select **Notebook Settings** and the **User Management** tab.
- To add a member, click **New User**, type in their email address, and click **Add User**. They will receive an email indicating that you shared content with them, and the notebook will be added to their notebook list.
- By default, new members are invited as a User. The membership role can be adjusted through the **Role** menu, and access can be removed through the **Trash Can** icon.
- Use the **Transfer Ownership** option to transfer notebooks to another team member. It is not uncommon for someone other than the PI or team lead to create the notebooks and then transfer them to the appropriate owner.
- Once you transfer ownership, the former Owner becomes the Notebook Administrator. A Notebook Administrator can also invite other members to the notebook. Users and Guests do not have access to User Management and cannot invite other members.



An Account Administrator has access to all the notebooks owned by the Owner's account and can create new notebooks on behalf of the Owner.



- To add an Account Administrator, click your name and select **Account Manager**.
- Then click on **Add User To Account**, type in their email address, select **Account Administrator** as the role, and click **Add User**.

Establishing Notebook Policies

Consider establishing notebook policies and guidelines for how your team will use LabArchives. The following questions serve as a good starting point for establishing your policies:

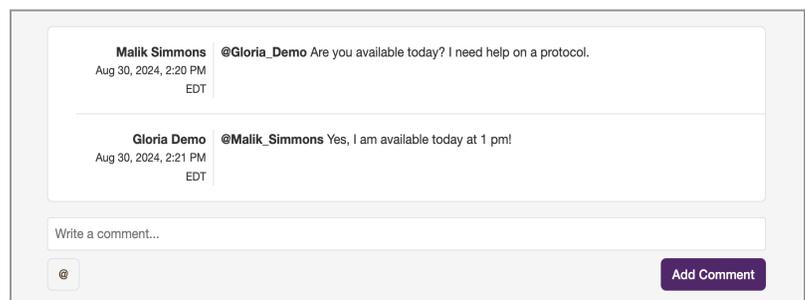
- What type of data will be stored in LabArchives?
- If there will be data stored outside of LabArchives, where will that data be stored?
- Do you want data entered in a consistent and standardized way — using a specific notebook structure or page structure?
- Will you establish a naming convention for pages or attachments in the notebook?

Collaborate and Communicate with Your Team

Communicate with other members of your team by adding a comment to an entry.



- To add a comment, select the **Comment** bubble on the entry toolbar.
- To alert a specific user, use **@mentions**.

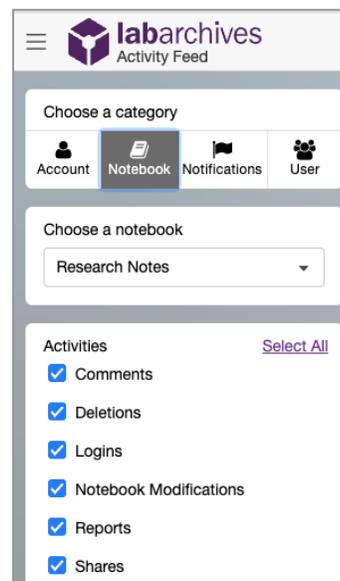


The mentioned user receives an email notification and an Activity Feed notification about the comment.

Monitor Actions in the Notebook

Every action (deletions, modifications, page signing, etc.) is recorded in the revision history and is part of the complete notebook audit trail. Notebook Owners can easily manage changes to the notebook using the Activity Feed, Notebook Dashboard, and Advanced Search Feature.

- The Activity Feed is available by clicking the **Bell** icon or by selecting **Activity Feed** in the triple dot menu. A system of categories and filters allow you to monitor specific notebooks or users.
- Expand the **Search** menu to see the Advanced Search options. Search a single notebook or within all the notebooks you are a member of to locate notebook data and monitor projects.



- Search on **Tags** and other specific fields through the **Advanced Search** menu. Use Tags as a project-based controlled vocabulary that you apply to the contents of a notebook to aid in the discoverability of your data.
- To view the notebook properties, activities and users, click on the name of the notebook to access the **Notebook Dashboard**.

Additional Help and Support

Find help through the **Information** icon and visit the [Knowledgebase](#) to browse by support topic, view [Video tutorials](#), register for one of our [regional webinars](#), or submit a question directly to our [Support team](#).

View the [Quick Start Guide for ELN New Users](#) for a review of how to add and manage data in the LabArchives Notebook.