Dotmatics LabArchives

Quick Start Guide for Inventory Lab Managers

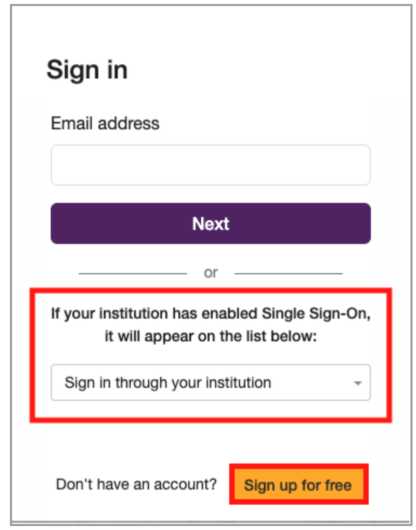
LabArchives Inventory

Simplify lab management and lower your administrative burden with custom tools for organizing and ordering inventory. Manage your inventory with precision by generating reports, tracking highly used categories and materials, expiration dates, low stock, order request updates, and freezer box capacity. We recognize that we have a significant responsibility to protect and secure your data, which is why our application undergoes annual external audits.

support@labarchives.com

Version 1.13.25

Create your LabArchives^{TM} Inventory Lab



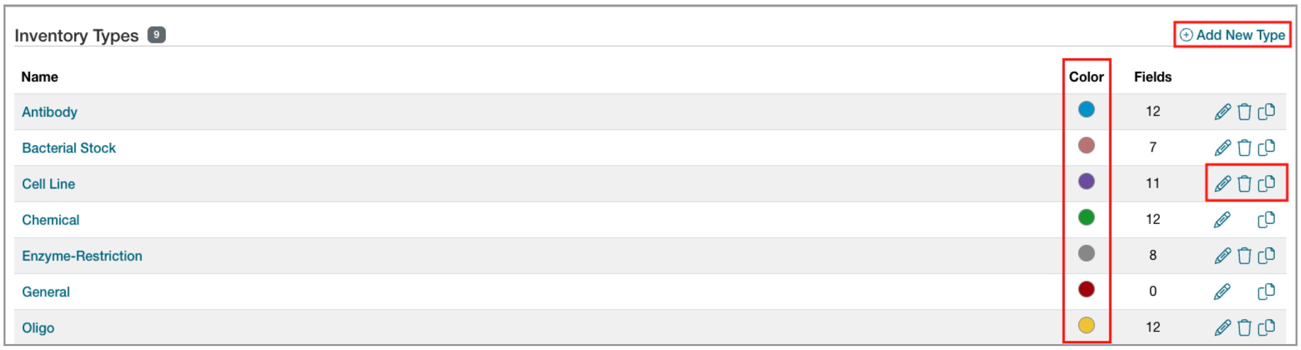
We suggest the lab manager or another research team admin create the Inventory Lab from their account. The creator of the Inventory Lab will be assigned the Lab Manager role and will be able to customize the Inventory Lab, manage access, bulk upload items, bulk update items, and manage the order process.

- Access Inventory from one of our regional servers:
  - USA and rest of world: https://inventory.labarchives.com/
  - UK: https://uk-inventory.labarchives.com/
  - EU: https://eu-inventory.labarchives.com/
  - AU: https://au-inventory.labarchives.com/
- Enter your email address or select your institution from the **Sign in through your institution** list.
- If you would like to create a free account, click **Sign up for Free**.
- If you already have a LabArchives ELN account, you can click the **Test Tube** icon from your notebook to access Inventory and activate a new Inventory Lab.

Inventory Types

Users assigned the Lab Manager role will have access to the **Lab management** Gear Icon. Select Inventory Types to see the list of nine default Inventory Types; each type will include unique fields that are specific to the Inventory Type, as well as standard fields that are available for all inventory items.

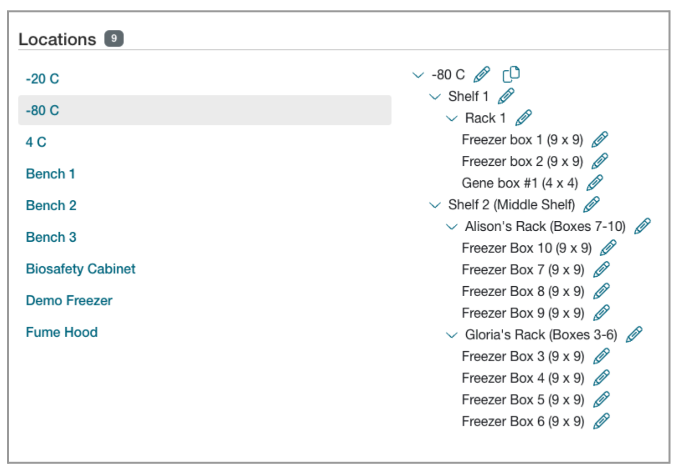
- To edit an Inventory type, click the **pencil icon** to edit existing fields or add new fields. Select **Add New Type** to create a custom Inventory Type.
- Assign a color to help distinguish between different inventory items.



Customize Storage Locations

From the Lab Management and Locations tab, add the locations where items can be stored. Consider how much detail your team needs to efficiently find an item.

- To create a new storage location, click **+New Location**.
- Click the **pencil icon** to add sublocations like Rack, Shelf, or Drawer.
- If the sublocation contains a freezer box, select **Freezer Box** and the appropriate size.



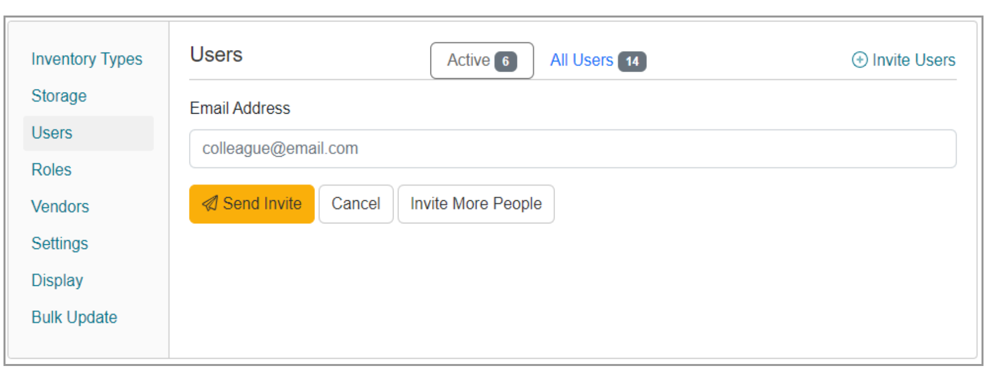
Adding Items

To upload multiple inventory items at a time, on the main Inventory display page click **Import Items** to download the **Import Inventory Template**.

- Each **Inventory Type** will be presented in a separate tab in the template. The columns within each tab will display the standard and custom fields for the Inventory Type. A row within each tab contains the item you wish to add to Inventory.
- After items are added to the **Import Inventory Template**, save the file, and then upload the template to Inventory.
- If you already have your inventory managed in a CSV file or Excel document, you can copy and paste the details into the Import Inventory Template. Be sure to line up each field to the appropriate column.
- Alternatively, you can use **Add Item to Inventory** to add items individually.
- After upload, items can be individually updated or through the **Bulk Update** option in Lab Management. Bulk Update uses a unique template that is not interchangeable with the Import Inventory Template.

Inviting Lab Members

To manage access to your Inventory Lab, click the **Gear** icon to access Lab Management.

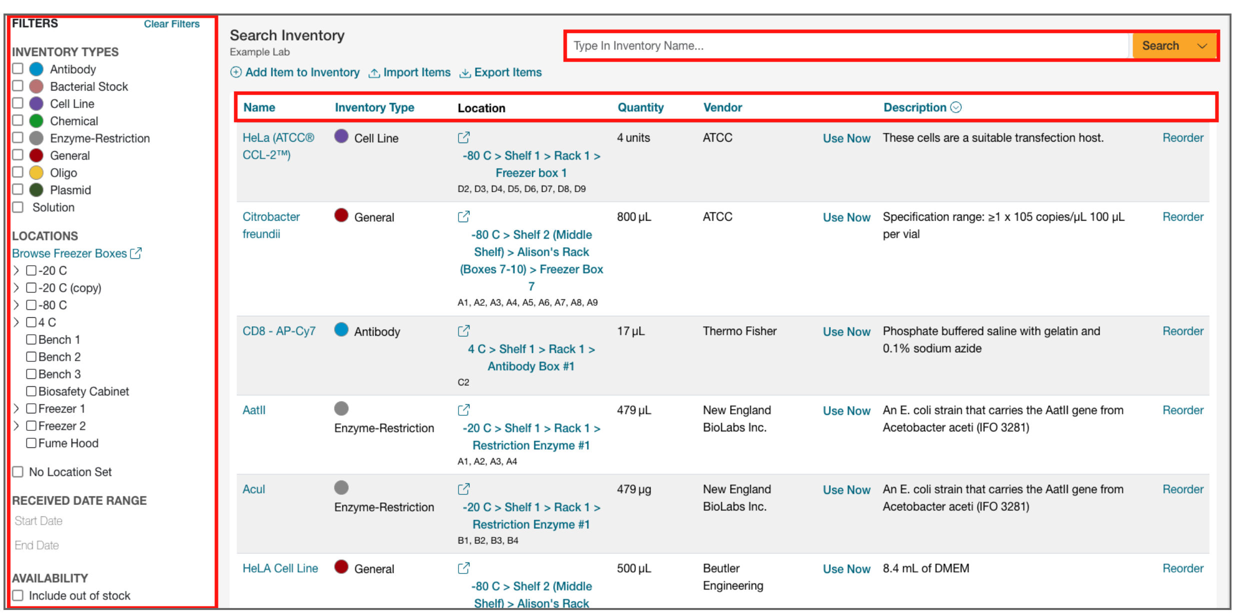


- Select the **Users** tab and click **+Invite Users** to invite your colleagues to access the Inventory Lab.
- From the **Roles** tab, create custom roles for members of your team. For example, if an intern should have the ability to use items but should not place orders, create a role called ‘Interns’ and assign all interns to this role.

Find and Use Items

Once items have been added to Inventory, Lab Members can quickly locate items for use and update quantities by selecting **Use Now**. When an item is low or out of stock, an **Order** request can be submitted.

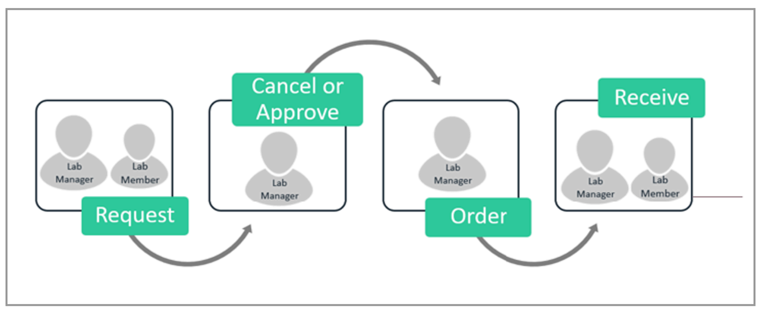
- From the main Inventory view, use the **Filters** to locate items by their Inventory Type, Location, Received Date Range, and Include your out of stock items.
- Select a column header to **Sort** by Name, Inventory Type, Quantity, and more.



- Use the **Search Inventory** menu to look for an item by keyword. Use the **Advanced Search** to set up more complex searches and to save a frequently used search.
- If QR Codes or labels are printed and added to the physical items in your Inventory, scan them using the **Camera** button in Inventory, or directly from the camera feature on your mobile device.

Submitting, Approving, and Tracking Orders

The Orders workflow allows Inventory members to request orders for items that may be low or out of stock. The **Reorder** option is available from the main Inventory view and from the individual Inventory item view.



- After an Order is submitted through the main Inventory list or through the individual item view, the Lab Manager can begin to manage the request through the **Orders** tab by either **Approving** or **Canceling** the order.
- If the Order is approved, the Lab Manager can update the status to **Ordered** after going out to procurement to place the order.
- Once the item has been **Received**, Lab Manager can update the status to Received, and the item is created in LabArchives Inventory.

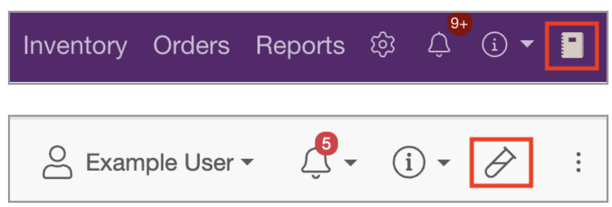
Reports

Lab Managers have access to the Reports tab to track additional details about their Lab and inventory items.

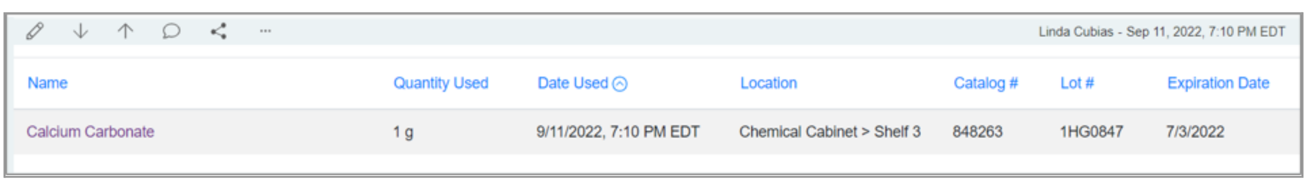
- **Expiration Report** keeps track of upcoming expiration dates for inventory items that will expire in 30 days, 60 days, or 90 days.
- **Low Quantity Report** displays inventory items that have reached the low quantity threshold required for reorder notification.
- **Orders Report** views a summary of all Orders placed in the lab.
- **Freezer Capacity Report** will show a list of all storage locations labeled as **Freezer Boxes**, as well as the number of cells in each Freezer Box, the number of cells that currently contain an item, and the available capacity.

Integrate with the LabArchives Notebook

The integration provides bi-directional links from the Notebook to Inventory including a link in Inventory that tracks the use of an item in experiments logged in Notebook.

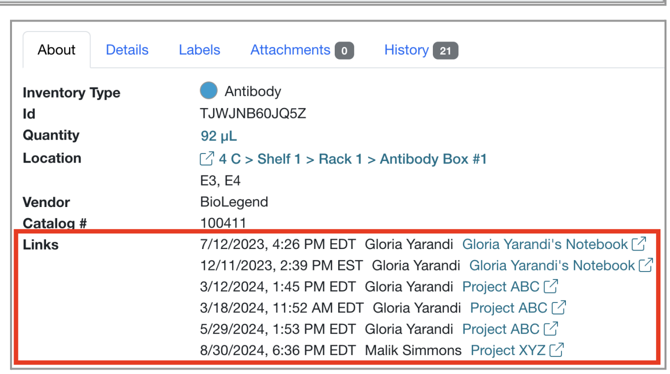


- From LabArchives Notebook, use the **Inventory List** entry type to create a list of Inventory Items that pull directly from Inventory and are linked in the Notebook.



Name	Quantity Used	Date Used	Location	Catalog #	Lot #	Expiration Date
Calcium Carbonate	1 g	9/11/2022, 7:10 PM EDT	Chemical Cabinet > Shelf 3	848263	1HG0847	7/3/2022

- When editing the Inventory List entry type, search your Inventory Lab and click **Use Now** to use the item and deduct the quantity used.



- For items that are not tracked in Inventory, e.g., glassware, select the option **Manually add an inventory item to the list.**

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.

Review the Quick Start Guide for Inventory Lab Members to learn how Lab Members can use Inventory to locate items and request orders.