

LabArchives

Setting up Notebook(s) for your lab

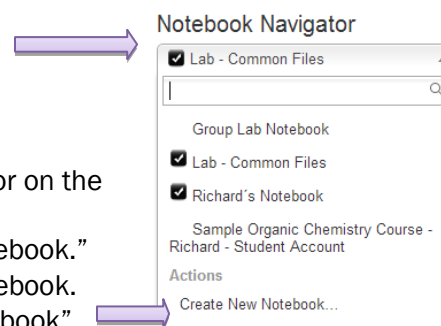
Whether you have a paid account or a free trial, the PI (or a designated Administrator) should start by creating the desired LabArchives notebook(s) in their account & inviting their members/collaborators to use the platform.

This is very easy to do once you decide how your notebooks/users should be set up for your lab, either: a.) a single notebook for the entire lab - with folders for each member/project, b.) a notebook for each lab member, or c.) notebooks based on projects/grants/etc.

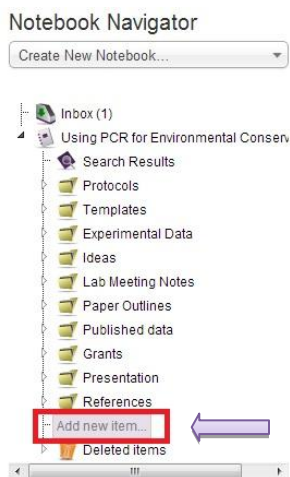
If the PI (or Administrator) initiates this process they are automatically designated as the Owner of the notebook(s) ensuring access with no need for added steps.*

Create a Lab Notebook

- Once you log in to your LabArchives account, locate the Notebook Navigator on the left hand side of the screen.
- Click on the drop-down menu and under “Actions” select “Create New Notebook.”
- Once selected, a new window will appear asking you to name the new Notebook.
- Select a name (eg. Ellen’s Notebook or Project X), then press “Create Notebook”



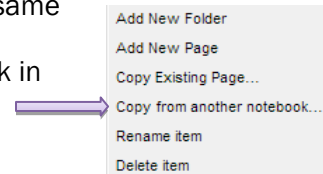
Customize the Notebook Structure (optional)



All new LabArchives notebooks come with a default set of folders to help users document & structure their work – from experimental data & protocols to lab meeting notes & grant documents. The PI/Administrator may keep the folders as they are and skip this step – allowing lab member to personalize the notebooks - or they may modify the structure to better fit their needs & provide greater uniformity.

- Existing folders can be moved, renamed, or deleted. Note that folders and pages can be ‘dragged and dropped’ within the Notebook Navigator structure.
- In order to create new folders, sub-folders or pages, click on “Add New Item” (or right-click/ CTRL-click) as shown by the arrow on the left

Note: for PI/Administrators wanting several notebooks with the same structure, when creating subsequent notebooks use the “Copy from Another Notebook” feature once in the new notebook in order to save time and replicate the customized structure.



The final step is to grant lab members/collaborators access to an entire notebook or just certain folders. Based on how you set up your notebook(s) for our lab, follow the instructions below to add someone to an entire notebook or to grant them access to individual folders or pages.

Add Lab Member(s) to a Notebook

- First, notice which is the 'active notebook' that appears under the Notebook Navigator drop down menu.
- From the three stacked bars on the top right select "Notebook settings" then "Notebook User Management"
- Then go to "Add a user to your Notebook," type the e-mail address of the lab member(s) you want to access the 'active notebook' & click on Add.
- Set the role to be "User" or, to enable sharing, "Administrator."
- The system will send an e-mail to the user informing that they have been granted access to this notebook.
- (If an Administrator is doing this on behalf of a PI, then the e-mail of the PI should be added for each notebook and given the role of Administrator.)

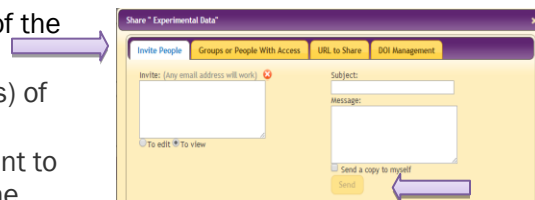


Note that the recipient does not need to have a LabArchives account before adding them as a member. If there is no account yet associated with the e-mail provided, a link is included in the e-mail for them to create one.

Repeat the steps above for each notebook, but * note that if a lab member has already created a notebook in a free account it might be limited to 25MB of capacity until it is linked to a PI with a paid account. They should therefore add the PI's e-mail as a user following the steps above then click on the "Transfer Ownership" link on the right. If the PI has a paid account the notebook will be upgraded to the *Professional Edition* and the PI obtains access.

Grant a Lab Member/Collaborator access to any Folder(s)

- Based on your notebook setup you might want to provide access to certain folders rather than the entire notebook, in which case you should use LabArchives' share function instead.
- Simply right-click (or CTRL-click for Mac users) on the name of the desired folder then select "Share"
- The menu on the right will appear - confirming on the top the name of the folder to which you are about to grant access
- On the default "Invite People" tab you can type the e-mail address(es) of the lab member(s) and specify read-only or read/write privileges.
- Once you click on Send, access is enabled and an e-mail notice is sent to the user(s) including a link to create an account if they don't have one.



Notice that after using the share feature, the name/e-mail will appear in the second tab: "Groups or People with access." You can return her at any time to revoke access privileges or extend it to other lab members whom you want to grant access to the currently selected folder.

Most users can figure out the main features of LabArchives on their own within ~60 minutes, yet those who choose to participate in one of our [webinars](#) or a custom web demo for their lab find it an effective way to see how easy it is to use and get their questions answered before transitioning from their traditional paper lab notebooks...

We hope that this document is useful in getting your group started. If you have any questions feel free to contact your account manager, write to support@labarchives.com or review our [Help pages](#) and library of [short videos](#).