

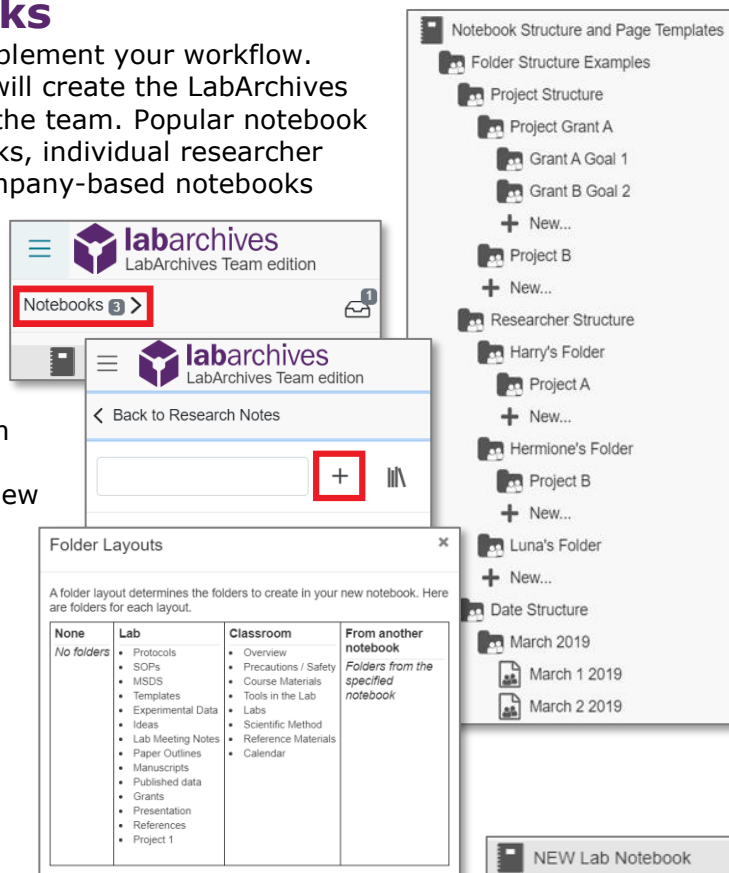
Setting Up Your Team Notebooks

LabArchives™ is designed to be flexible and to complement your workflow. Typically, the PI, project lead, or an Administrator will create the LabArchives Notebooks and share them with other members of the team. Popular notebook structures include project and grant based notebooks, individual researcher notebooks, date-based notebooks, and team or company-based notebooks that contain shared materials to reference and reuse.

Create a Notebook

When you create your account, a notebook called **My Notebook** will be automatically created. You can use this suggested notebook or create your own notebooks.

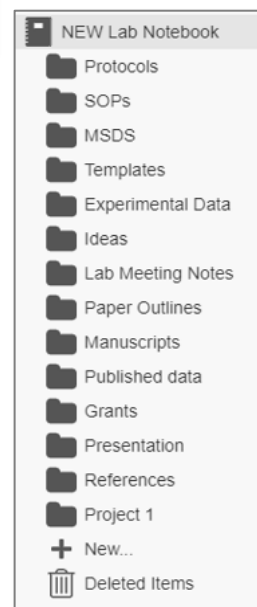
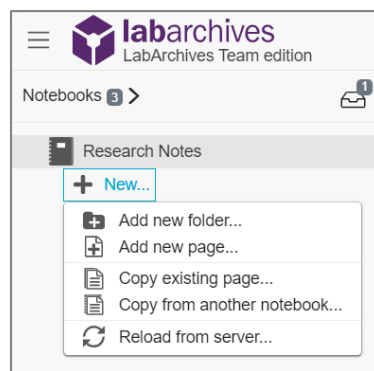
- To create a notebook, click **Notebooks** to view the list of notebooks and click the **+** Icon to create a new notebook. Name your notebook, select a folder layout, and click **Create Notebook**.
- When choosing the folder layout, keep in mind that you can further edit and modify the layout at any time.
- If you do not know where to start, choose a layout that is closest to what you may use and then rename, delete, and edit the folders to best meet your needs.



Customize the Notebook Structure

Every 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.

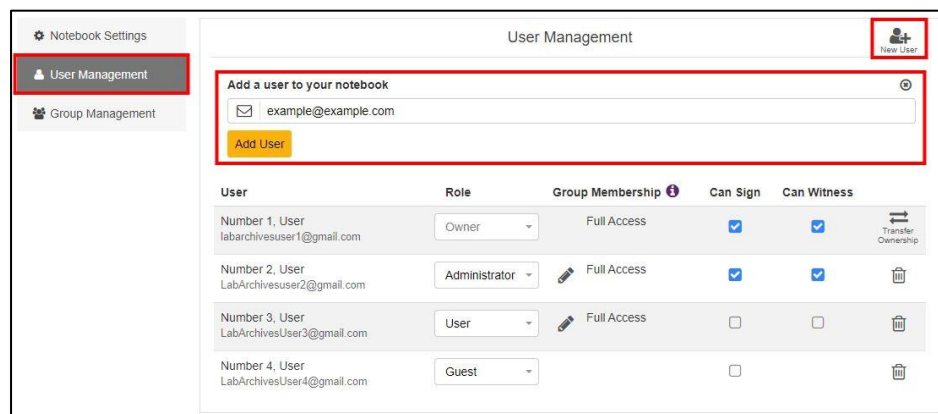
- You can create a new page or folder in a selected notebook by clicking **+ New**.
- All folders and pages can be moved by using drag and drop within the notebook structure.
- Right click (Ctrl + Click for Macs) on the folder or page name for options like renaming or deleting the item. If you delete 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, you can share anything from a single entry to the entire notebook with other team members. You can also setup custom permissions and rights 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, Administrator, User, or Guest.

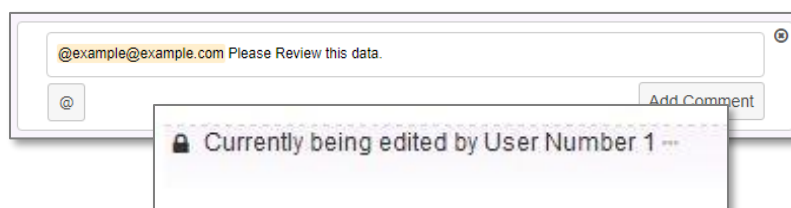
- To manage users in the notebook, click the triple dot menu on the top right, select **Notebook Settings** and go to the **User Management** tab.
- To add a member, click **New User**, type in their email address, and click **Add User**. They will receive an email indicating that you shared content with them. When they login, this notebook will be in view.
- By default, new members are invited as a User. You can modify their membership role through the **Role menu** and remove access at any time through the **Trash can** icon.
- Use the **Transfer Ownership** option to transfer notebooks to another team member. It is not un-common 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.



Collaborate and Communicate with Your Team

Consider establishing notebook policies and guidelines for how your team will use LabArchives. 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? Do these questions overwhelm you? Then start small and feel good knowing that you are already taking positive steps towards achieving reproducibility and improving your data management.

- You can 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.



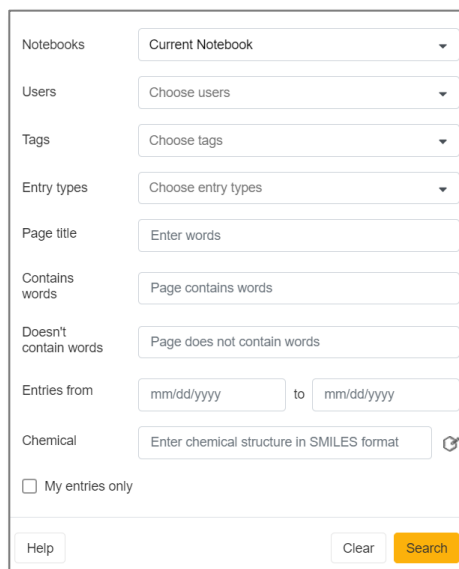
- To alert a specific user, use @mentions. The mentioned user receives an email notification and an activity feed notification about the comment.
- For most entries, when other users are working in an entry you will see a lock indicating that the item is being edited.

Monitor Actions in the Notebook

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



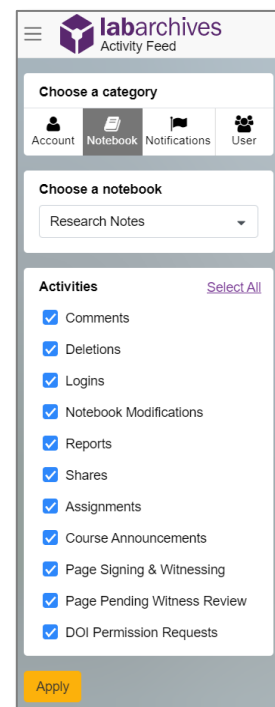
- The activity feed is available by clicking the **Bell** icon or by selecting **Activity Feed** in the triple dot menu.
- The activity feed is organized with a system of categories and filters that allow you to monitor specific notebooks or users.
- Expand the search menu to see the **Advanced Search** 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 and naming convention that you apply to the contents of your notebook to aid in the discoverability of your data.
- The **Notebook Dashboard** is accessible by clicking the name of the notebook while it is open. It includes a snapshot view of notebook properties, activities, and users.



Advanced Search filters:

- Notebooks: Current Notebook
- Users: Choose users
- Tags: Choose tags
- Entry types: Choose entry types
- Page title: Enter words
- Contains words: Page contains words
- Doesn't contain words: Page does not contain words
- Entries from: mm/dd/yyyy to mm/dd/yyyy
- Chemical: Enter chemical structure in SMILES format
- My entries only

Buttons: Help, Clear, Search



Activity Feed Panel:

- Choose a category: Account, Notebook, Notifications, User
- Choose a notebook: Research Notes
- Activities:
 - Comments
 - Deletions
 - Logins
 - Notebook Modifications
 - Reports
 - Shares
 - Assignments
 - Course Announcements
 - Page Signing & Witnessing
 - Page Pending Witness Review
 - DOI Permission Requests
- Buttons: Apply

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.