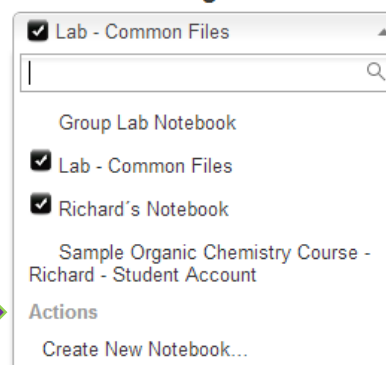


To help your group get started, the PI or an Administrator should create LabArchives® notebook(s) for lab members within his/her account. It is possible to create a single notebook for the entire lab with folders for the work of each member, however, most customers create separate notebooks per lab member. If the PI/Administrator initiates this process, they become the owner of each notebook & the system sends a welcome e-mail to lab members.

Create a Lab Notebook

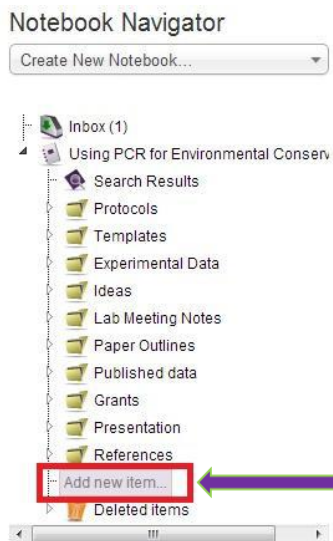
- After you log in to your LabArchives account, look for the Notebook Navigator on the left hand side of the screen.
- Click on the drop-down menu and under “Actions” select “Create New Notebook.”
- Once selected, a new window will appear asking you to name your new Notebook.
- Select a name (eg. Ellen’s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

Notebook Navigator

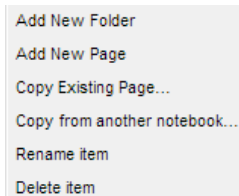


Customize Notebook Layout (optional)

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



- Existing folders can easily 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)
- If the PI/Administrator wishes to personalize user notebooks



Add Lab Member(s) to a Notebook

- After creating a notebook its name will appear on the dropdown menu below your Notebook Navigator.
- From the purple “User Management” menu select “Notebook User Management.”
- Next 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.
- Then select the member’s role to be “User” or “Administrator.”
- The system will immediately send the lab member a welcome e-mail letting them know you have made them a user of this notebook. It will include a link to the page where they create their LabArchives account or can log in if they already have an account.



The screenshot shows a web interface for adding a user to a notebook. It features a purple header bar with the text "Add a user to your notebook". Below the header is a text input field labeled "New user's email address" and a small "Add" button to its right.

Repeat the steps above for each lab member, but note that if a lab member has already created a free account their notebooks will be limited to 25MB of memory until they are linked to the PI/Administrator’s account. They can do this by adding their PI’s e-mail following the instructions above then clicking on the “Transfer Ownership” link. The notebook will immediately be upgraded to the *Professional Edition* with 200+GB & the PI will obtain access.