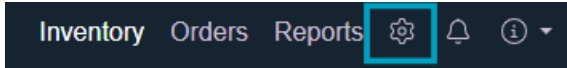


Capabilities of a Lab Manager Role in LabArchives.

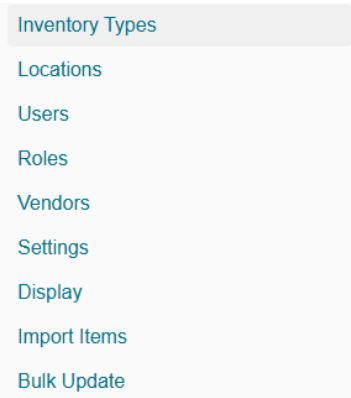
1. Log into LabArchives and click on the inventory icon in the upper right-hand corner.



2. Along the top right-hand corner select the cog icon to enter the settings and access lab manager capacities of LabArchives.



3. Within the settings module you will see the following categories listed down the left-side of your screen: Inventory Types, Locations, Users, Roles, Vendors, Settings, Display, Import Items, and Bulk Updates. These will allow you to customize LabArchives inventory to a certain extent for the function of your lab. The remaining parts of this document detail the capabilities in each category and what options are available to the lab manager after selecting each one.



4. **Inventory Types**

- a. **Creating a new inventory** – If your lab requires an inventory other than the standard pre-populated selections, such as a compressed gas inventory, a custom inventory can be created. Click ‘+ Add a New Type’

[⊕ Add New Type](#)

This will open a screen prompting you to enter a name for the inventory currently being created. Type in the new inventory name and select ‘Add Inventory Type’. You can now customize the inventory by adjusting the required fields (fields that are mandatory when adding an item to the inventory) and creating custom fields, see part C below.

Standard Fields ⓘ

	Required?		Required?
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Vendor	<input type="checkbox"/>
<input checked="" type="checkbox"/> Quantity	<input type="checkbox"/>	<input checked="" type="checkbox"/> Catalog #	<input type="checkbox"/>
<input checked="" type="checkbox"/> Location	<input type="checkbox"/>	<input checked="" type="checkbox"/> Lot #	<input type="checkbox"/>
<input checked="" type="checkbox"/> Description	<input type="checkbox"/>	<input checked="" type="checkbox"/> Price	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Date Received	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Grant #	<input type="checkbox"/>
		<input checked="" type="checkbox"/> PO #	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Expiration	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Safety Sheet	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Notes	<input type="checkbox"/>

Custom Fields 11 [Add Field](#)

- b. **Update an existing inventory** – To update an existing inventory to adjust the required fields select the pencil system for the appropriate inventory along the right side of the screen. You can also click on the name of the inventory.



Prepopulated and custom findings can be adjusted, and the inventory can be renamed, except 'Chemical' and 'General'. To make a 'Standard Field' (those automatically created by LabArchives) required, 1. Select the pencil icon for this section then 2. Check the desired box to the left of the field name to adjust the requirement. By selecting the box for required on any field this will make the field a mandatory question when adding inventory item and will not allow a user to save without completing it.

Standard Fields ⓘ

	Required?		Required?
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Vendor	<input type="checkbox"/>
<input checked="" type="checkbox"/> Quantity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Catalog #	<input type="checkbox"/>
<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Lot #	<input type="checkbox"/>
<input checked="" type="checkbox"/> Description	<input type="checkbox"/>	<input checked="" type="checkbox"/> Price	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Date Received	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Grant #	<input type="checkbox"/>
		<input checked="" type="checkbox"/> PO #	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Expiration	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Safety Sheet	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Notes	<input type="checkbox"/>

To remove a standard field from the inventory, unclick the check box immediately to the left of the field name.

- c. **Creating a custom field** – laboratory can create various custom fields as they need. One custom field that labs should create is a **Particularly Hazardous Substances** or PHS identifying question. To create the custom field 1. click into the 'Chemical Inventory', 2. select 'Add Field' halfway down the page next to 'Custom Fields' to create a new field.

Custom Fields 13 [+ Add Field](#)

In the 'Label' box type a label related to Particularly Hazardous Substances, such as 'Is this a Particularly Hazardous Substances (PHS)?'. Select 'Dropdown' from the format options and create two fields, 'Yes' and 'No'. Check the box below

'Required' to make this a required field when creating inventory items. Be sure to select Save prior to exiting the inventory.



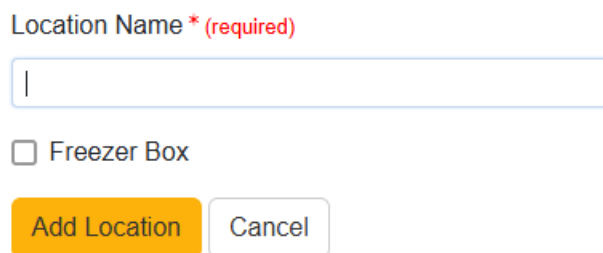
A screenshot of a web form. The first field is labeled 'Particularly Hazardous Material'. To its right is a dropdown menu. Below the dropdown are two input fields: 'Yes' and 'No'. To the right of these fields are trash can icons and a plus sign. Further right are 'Save' and 'Cancel' buttons.

- d. **Removing inventory types** – If a lab does not need or want all “inventory types” pre-populated by LabArchives, select the trash can icon for the appropriate inventory type. Chemical and General inventories are the only two types that cannot be deleted.




5. **Locations** – Adding locations here will allow lab members to accurately reflect storage areas in the lab. Sublocations can be created such as specific freezers and cabinets within a room.

- a. **Creating Locations** – To add locations to your inventory select ‘Add New Location’ along the upper right side. Type the desired room number into ‘Location Name’ and then click ‘Add Location’. This will set the location as an option in the Inventory.

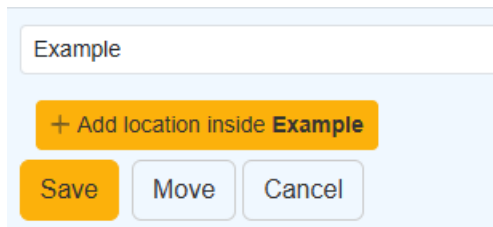


A form for creating a location. It features a text input field labeled 'Location Name * (required)'. Below the field is a checkbox labeled 'Freezer Box'. At the bottom are two buttons: 'Add Location' and 'Cancel'.

- b. **Creating sub or secondary locations** – To designate spaces within a room or lab area such as flammable cabinets or specific cabinets in a lab click on an existing location. Select the pencil icon next to the location name.


Example  

This will allow you to ‘Add location inside _’. The location can also be renamed this way.



A screenshot of a form showing an example. A text field contains the word 'Example'. Below it is a button labeled '+ Add location inside Example'. At the bottom are three buttons: 'Save', 'Move', and 'Cancel'.

Enter the secondary location and select Save. You will now be able to see the sub-location inside the room/lab area. These same steps can be used if further sub-locations like “Box 1” in a freezer etc. are needed to be added within the sub-location.

Example  
Cabinet 

***NOTE:** It is recommended by the vendor that the inventory types and locations be set up and specified before completing the bulk import of existing inventories. It is still possible to adjust these fields after a bulk import. *

6. Users


- a. **Add/remove users** – To invite a user to the lab click ‘Invite User’ from the right-hand side.

Email Address

[+ Invite Users](#)

Use the lab member’s NIH email to send the invite, multiple invitations can be sent at once by clicking ‘Invite More People’ which opens a pop-up with multiple lines for NIH emails. If a user is no longer part of the lab click the trash can icon on the right side of their name to remove them.

- b. **Update a user’s role** – If a user role needs to be changed following their addition to the lab select the drop-down menu next to their name. See section 7 below for instructions on creating or editing Roles in LabArchives.

7. Roles

- a. **Existing roles** – The roles of Lab Manager and Lab Member are pre-populated by the LabArchives Inventory system. These roles cannot be edited.
- b. **Creating new or custom roles** – If a lab would like to create a new role such as ‘Intern’ or ‘Administrative’ with different access and ability from the pre-populated roles select ‘New Role’ from the upper right.

[+ Add New Role](#)

You will have the ability to enter a custom name and select what capabilities the user would have. These custom roles can be edited in the future.

Role Name * (required)

INVENTORY MANAGEMENT

- Update all inventory items
- Create items and add to inventory
- Create and edit inventory types

SEARCHING

- Search for all items

LAB MANAGEMENT

- Manage lab data and settings
- Receive expiration and quantity notifications

STORAGE MANAGEMENT

- Manage storage locations

ORDERING

- Request item to be ordered
- View all orders
- Update all orders
- Approve all orders
- Cancel all orders
- Cancel own orders
- Receive own orders
- Receive all orders

8. **Settings** – This tab houses the Lab Information where the Lab Name, building, floor, and room can be entered and edited as needed.
9. **Display** – Adjustments to the inventory display format can be made here. This can include changing the order of columns and hiding or showing base information. To remove a column from the quick view, drag the desired item from ‘Selected Columns’ to ‘Available Columns’. If you would like information from one of the ‘Available Columns’ viewable from the inventory display drag it down to ‘Selected Columns’.

Available Columns

Description + Vendor + Catalog # + Lot # + Grant # + PO # + Expiration +

Selected Columns

Name Location × Inventory Type × Price × Quantity × Date Received × Relationships × Use Now × Reorder ×

Removing a column from the display does not remove the information from the inventory. If you would like to return to the default selections select ‘Restore Default Display’ from the lower right.

10. **Import** – When a lab has an existing inventory it can be imported into the LabArchives system. Download the LabArchives template, the existing inventory can be copied over

into the applicable tabs and columns of the template.

Additional instructions are found in the template. It is recommended that a new template be downloaded each time an import is completed. When completing the Import, it is critical that labs **do not delete** any unused parts of the template and that all required fields are entered.

11. **Bulk Update** – When you have an existing inventory in LabArchives and need to update locations or quantities for materials as group instead of going one by one the Bulk

Update feature can be used. Use the excel template provided to update any applicable quantities or locations.

Use this template to **update existing Inventory items** in bulk.

Please read before using the template:

- Only update the item details for any item that has changed.
- If the field is not going to be updated, do not make any changes to the field.
- If the field should be empty, leave the field blank on the import template.
- **If an item quantity is listed as 0, it will be marked out of stock.**

I understand that I will be updating the inventory. I will notify other members of my inventory while this is in process.

Tip: To avoid any issues, save an export of your inventory items before the bulk update. If you want to update selected items, you can search for specific items and use the "Export items" option.

Download Template

Additional resources from LabArchives for topic specific questions and walkthroughs please click on the information button and then select 'Knowledgebase' from the drop-down menu. This will direct you to an FAQ page with specific topic articles linked. The knowledgebase can also be accessed at <https://help.labarchives.gov/hc/en-us/categories/16591035261332-Inventory>