



# **labfolder Admin Manual**

**v1.27.8**

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## Groups and sharing in labfolder

labfolder allows the collaboration within projects, the sharing of protocol templates and the communication within labfolder. Sharing is possible in groups, where sharing can be organized.

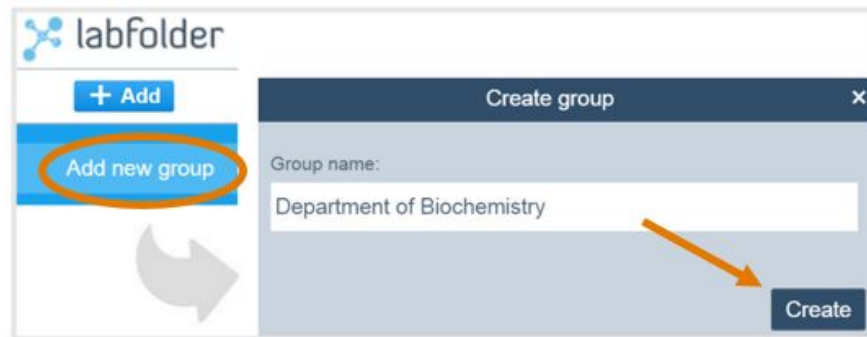
### labfolder Groups

Administrators can create groups and subgroups to better organize the structure of their team inside labfolder.

#### Create Group

●●● To Create a Group in labfolder:

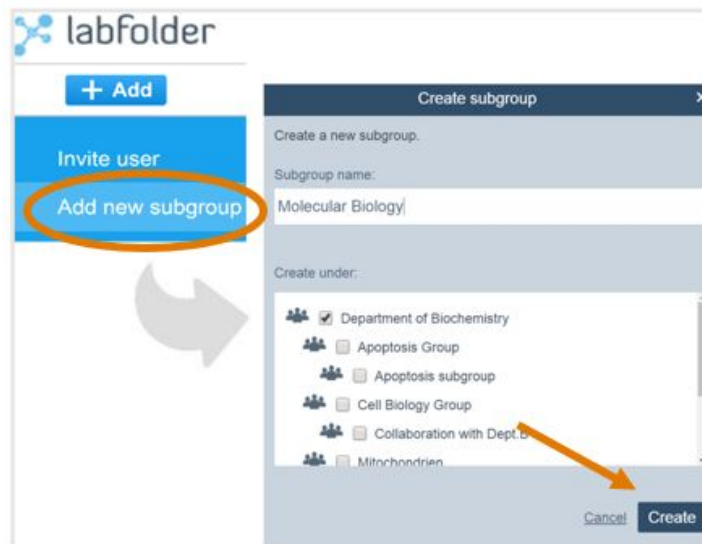
1. Go to *Manage > Groups*
2. Click on **+ Add** in the upper left hand corner
3. Choose *Add new group*
4. Once the dialogue is opened, add the name of the group
5. Click on *Create*



#### Create subgroup

●●● To create a subgroup in labfolder:


1. Go to *Manage > Groups*
2. Click on the group where the subgroup needs to be inserted
3. Click on **+ Add** on the upper left hand side
4. Choose *Add new subgroup*
5. Once the dialogue is opened, type the name of the subgroup
6. Click on *Create*

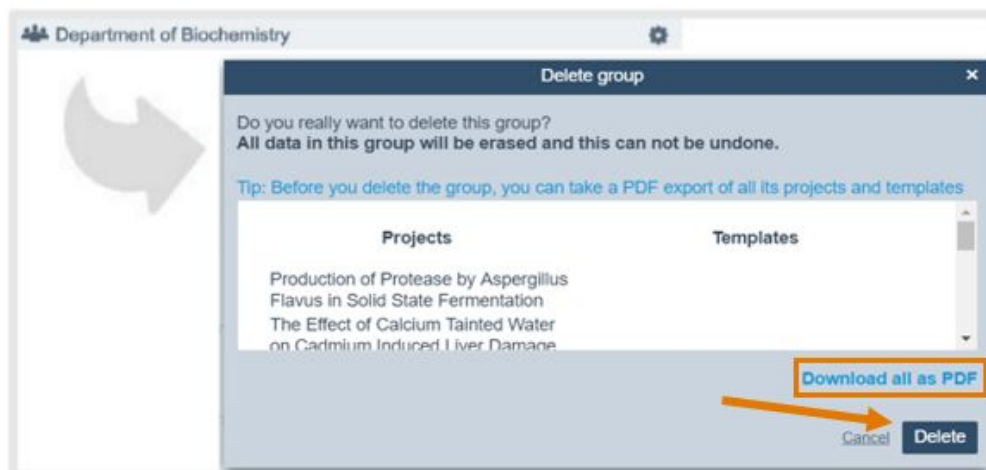


ⓘ It is possible to create new subgroups inside previously existing subgroups. To achieve this please select the pre-existing subgroup in *Create under:* in the lightbox.

## Delete Group

●●● To delete a group in labfolder:

1. Go to *Manage > Groups*
2. Click on the group that needs to be removed
3. Click on the gearwheel, , present on the right hand side when hovering over the group
4. Click on *Delete group*
5. Once the dialogue is opened, click on *Delete*



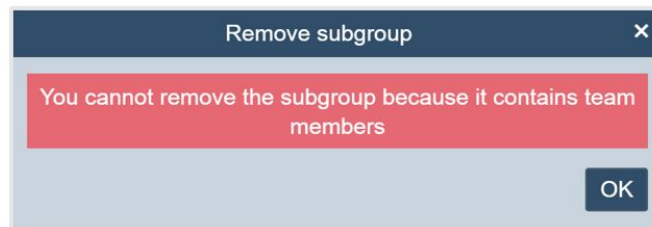
- ⚠ Before deleting the group, you have the option to download each group project as a PDF document.

## Remove subgroup

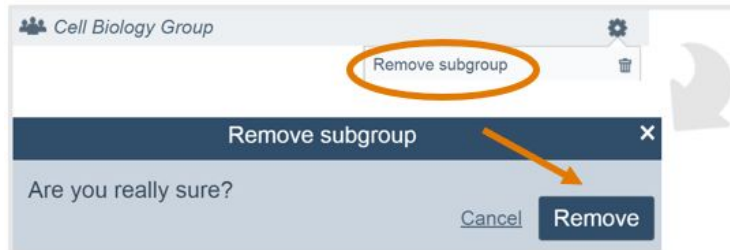
●●● To remove a subgroup in labfolder:

1. Go to *Manage > Groups*
2. Click on the group where the subgroup needs to be removed
3. Click on the gearwheel, ⚙, present on the right hand side when hovering over the subgroup
4. Click on *Remove subgroup*

- ⚠ **NOTE:** Before deleting the subgroup, you need to remove all the members that form it. If not, an error message will be displayed.



5. Once the dialogue is opened, click *Remove*



## Manage users

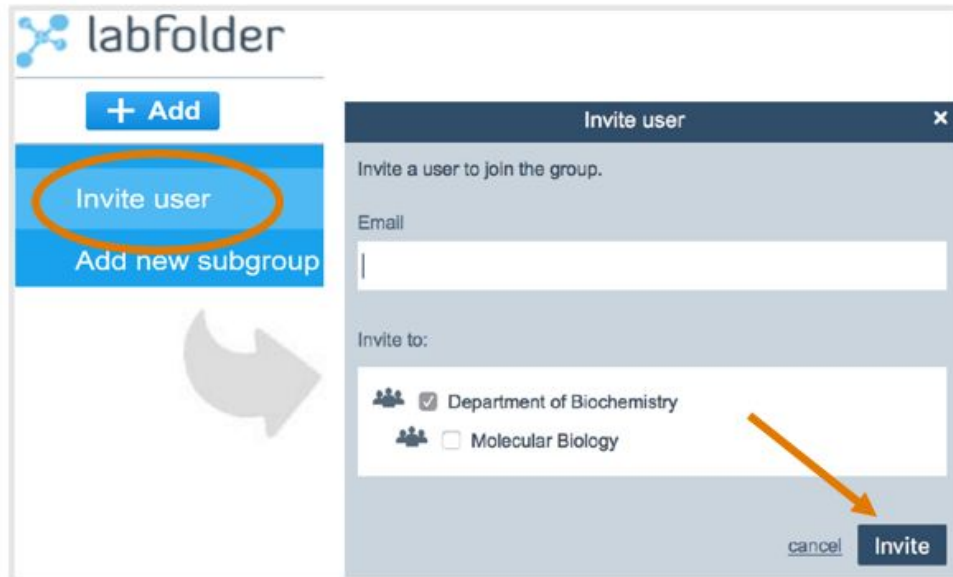
### Invite users

Administrators can invite users to the groups they created. The invitation, via automatic e-mail, can be sent to a labfolder user or to a person not yet registered to use labfolder.

●●● To invite users to join a group in labfolder:

1. Go to *Manage > Groups*
2. Choose the main group in which the group member will be added.

3. Click on **+ Add**
4. Choose *Invite user*
5. Once the dialogue is opened, add the email of the user and choose the (sub)group in which the group member will be added
6. Click on *Invite*



**Note:** The green *recommend* tab on the left hand side of labfolder is meant to spread the use of labfolder to more scientists. You aren't able to invite team members or colleagues to a specific group or project through this tab.

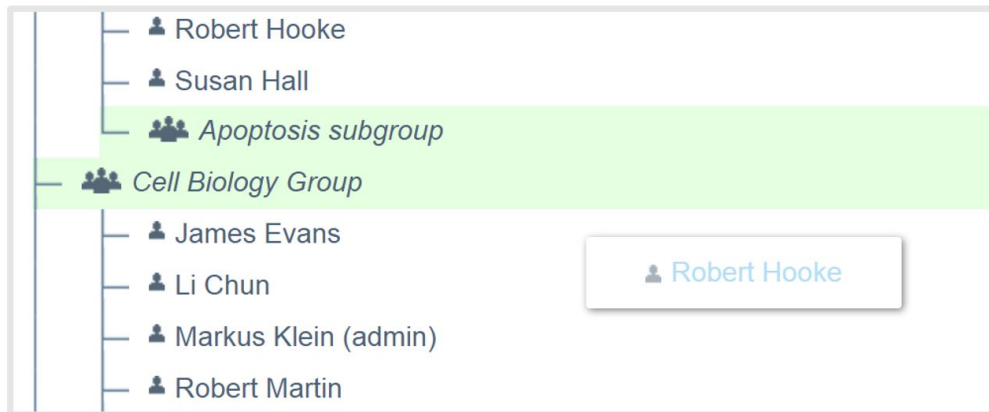
recommend

### Move users between subgroups

Administrators can move users into different subgroups inside the same group. When previously authorized, a user can be a member of several subgroups.

●●● To move users within subgroups in labfolder:

1. Go to *Manage > Groups*
2. Click on the group in which the user is a member
3. Click on the member you want to move and drop them into the desired subgroup
4. The possible subgroups to add the member will be displayed with a pale green background




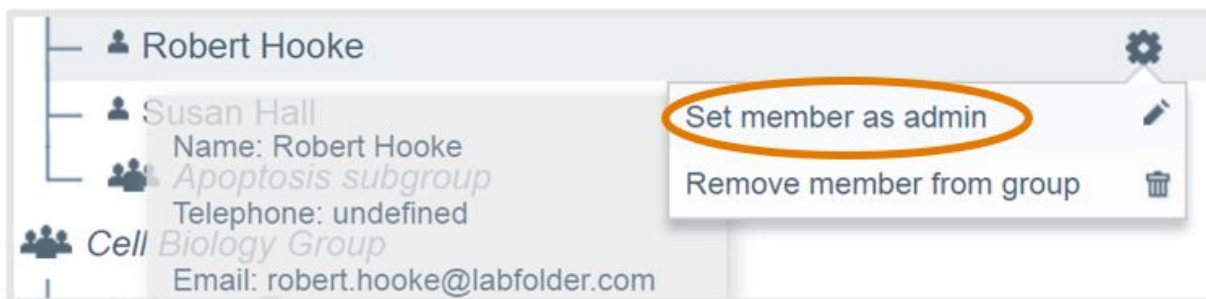
**Note:** If the user that is supposed to be moved between subgroups is an admin, it is not possible to move the user. Only the members who are not admins can be moved between subgroups.

### Set users as admin

Administrators can set other users as group admins and there is no limit to the number of admins per group. The rights and roles are identical to all admins regardless of their time as admins.

●●● To set users as admin in labfolder:


1. Go to *Manage > Groups*
2. Click on the group in which the user is a member
3. Click on the gearwheel, , present on the right hand side when hovering over the member
4. Click on *Set member as admin*

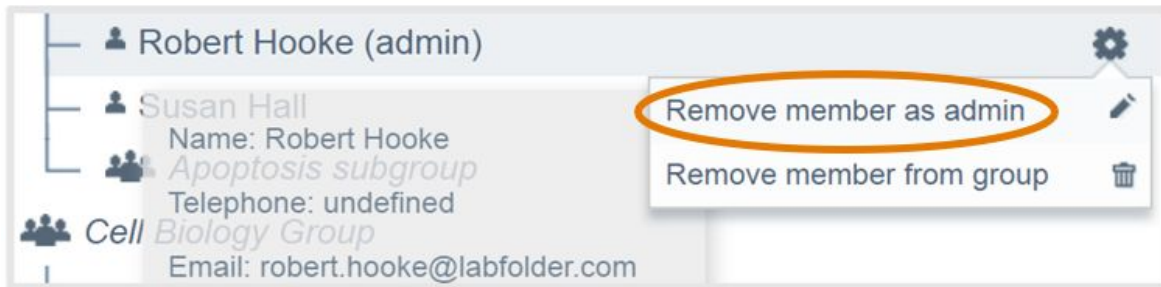


### Denominate admins

To denominate an admin, the initial steps are identical to the ones described to set a user as an admin.

●●● To denominate admins in labfolder:


1. Go to *Manage > Groups*
2. Click on the group in which the user is a member
3. Click on the gearwheel, , present on the right hand side when hovering over the member
4. Click on *Remove member as admin*



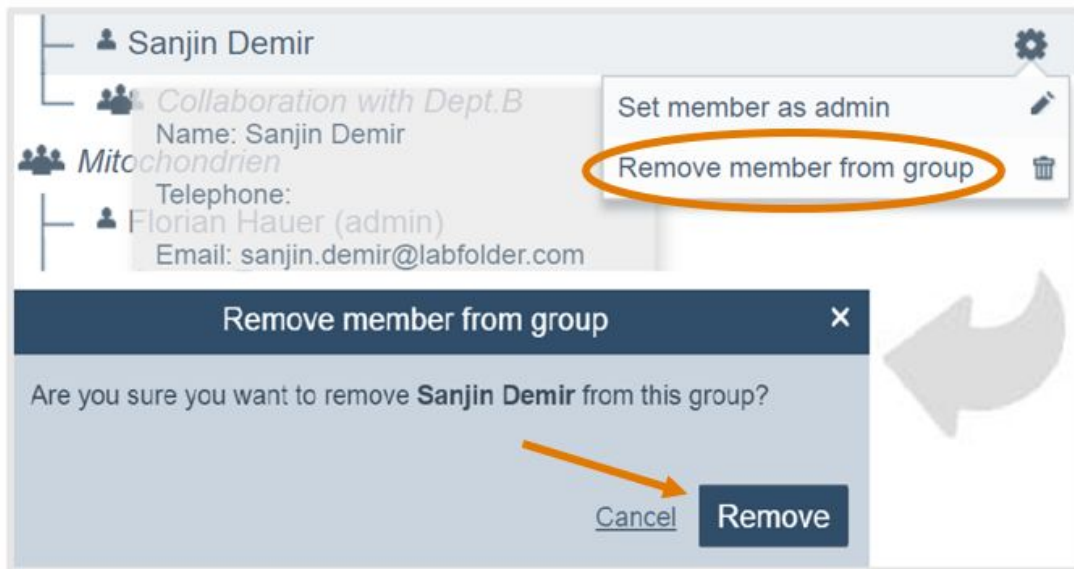
## Remove users


Group members can be removed from the group when necessary (e.g. a person leaves the laboratory). All the content created by the user (entries and projects) will remain in the group and the license from this user can later be reused.

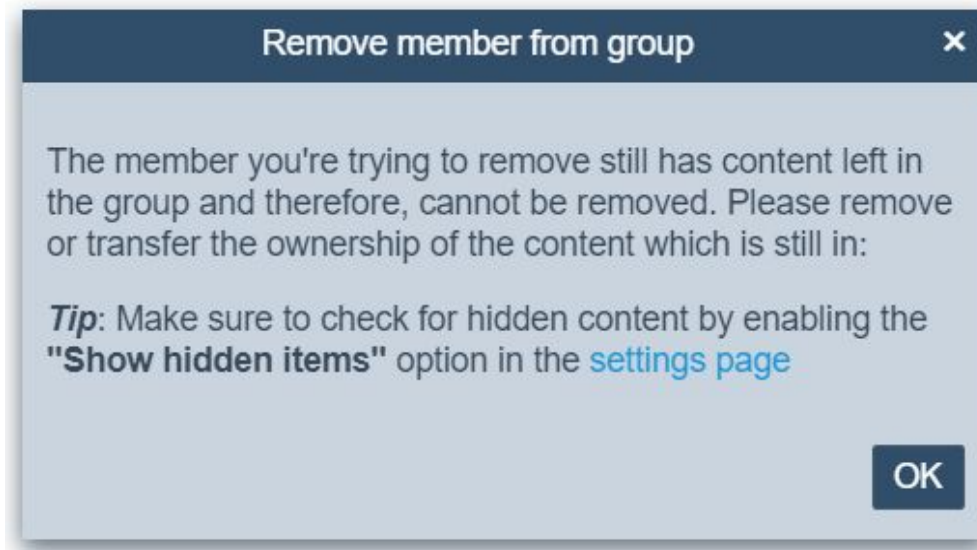
●●● To remove a user from a group in labfolder:

1. Go to *Manage > Groups*
2. Click on the group in which the user is a member
3. Click on the gearwheel, , present on the right hand side when hovering over the member
4. Click on *Remove member from group*
5. Once the dialogue is opened, click on *Remove*





-  **NOTE:** If the user is an owner of folders, projects or templates, you need to change their ownership to another person in the labfolder group.



## Group settings

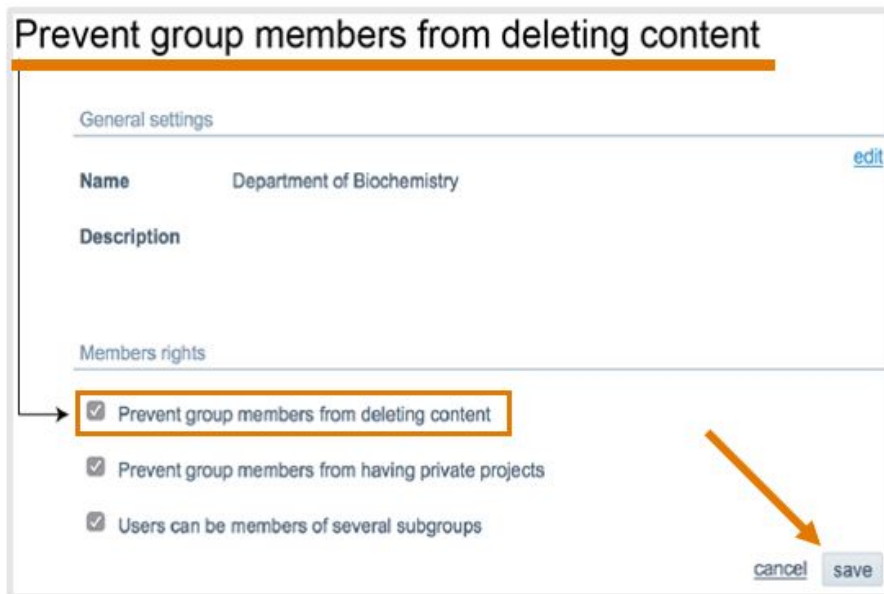
Administrators of the main group, but not of the subgroups, can edit the general settings of groups.

## Data safeguarding

Through the option, *Prevent group members from deleting content*, all users (including the admin) are restricted from deleting projects or any other data from the labfolder database. Projects will merely be hidden if a user decides to *Remove* it from their list of projects.

●—●—● To activate the *Prevent group members from deleting content* function:

1. Go to *Manage > Groups*
2. Click on the group that needs to be modified
3. Click on *settings*, located in the Administration section on the upper right hand side
4. In the new page, click on *edit* in Members rights
5. Check the option *Prevent group members from deleting content*
6. Click on *save*

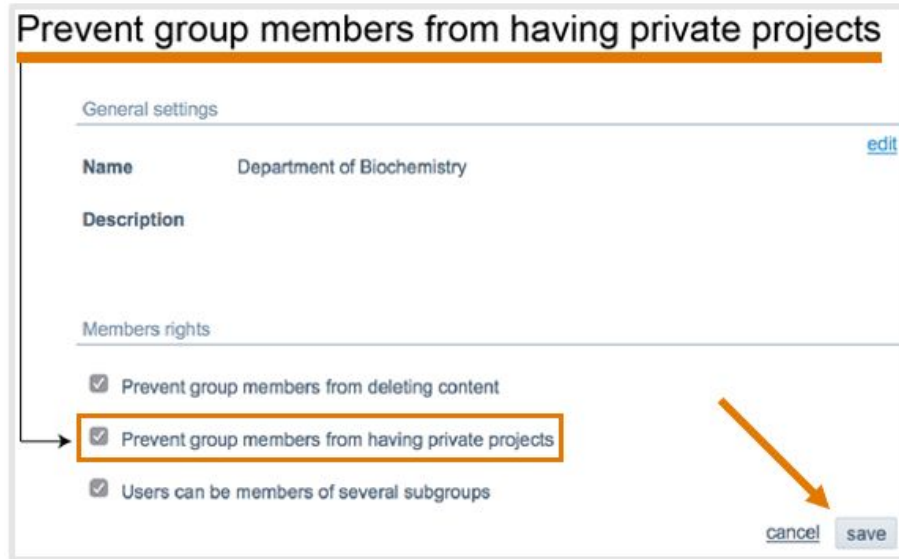



## Private Projects

By checking the option *Prevent group members from having private projects*, group members will not be allowed to have private projects. All private projects of group members will be moved into the group projects, but will not be shared with any other group members.

●—●—● To activate the *Prevent group members from having private projects* function:

1. Go to *Manage > Groups*
2. Select the group you want to modify
3. Click on *settings*, located in the Administration section on the upper right hand side
4. In the new page, click on *edit* in Members rights
5. Check the option *Prevent group members from having private projects*
6. Click on *save*



-  If the admin of the group does not allow private projects, users will be prompted with a warning when invited.

### Subgroup membership

The idea of the subgroup membership is to allow the users to be part of subgroups when they are already members of a group, through the option *Users can be members of several subgroups*.

- By ticking the checkbox, users which are already members of a group can also be invited to another subgroup within the group.
- If there is no tick in the checkbox of this option, members cannot be invited to any subgroup of their current group.

 To change the settings of the *Users can be members of several subgroups* function:

1. Go to *Manage > Groups*
2. Select the group you want to modify
3. Click on *settings*, located in the Administration section on the upper right hand side
4. In the new page, click on *edit* in Members rights
5. Check the option *Users can be members of several subgroups*
6. Click on *save*

### Allow users to be members of several subgroups

General settings

Name Department of Biochemistry [edit](#)

Description

Members rights

- Prevent group members from deleting content
- Prevent group members from having private projects
- Users can be members of several subgroups

[cancel](#) [save](#)

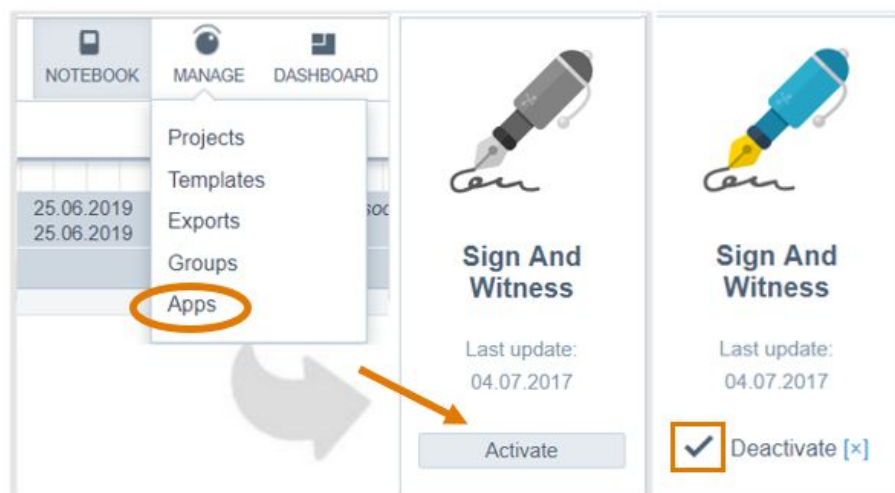
## Compliance Features

### CFR 21 Part 11 Digital Signatures

Documents can be signed digitally in labfolder. Digital signatures are compliant to FDA CFR 21 Part 11. When signing a labfolder document, all content, including uploaded files, is saved. The four-eye principle can be applied as well, allowing a member of a labfolder group to countersign the document.

●●● To activate the digital signatures:


1. Go to *Manage > Apps*
2. Activate the *Sign and Witness* app

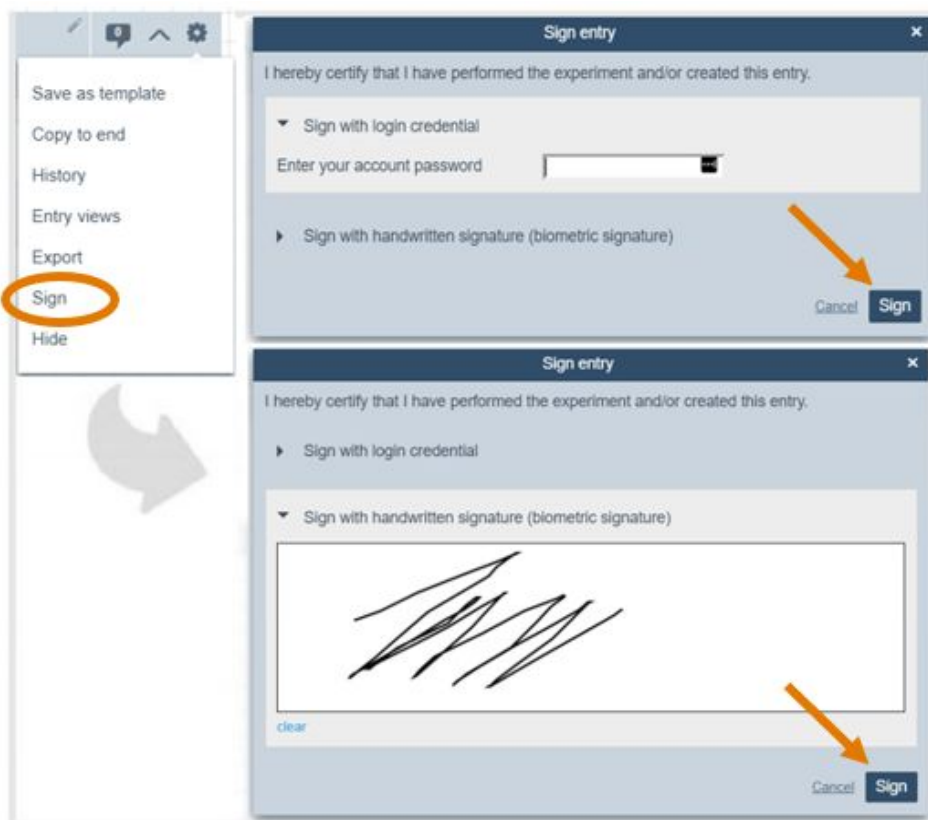


## Sign document with a digital signature

Documents can be signed with a digital signature in labfolder using the *Sign* function.

●●● To create a digital signature on an entry:

1. Click on the *Sign* function given in the gearwheel, .
2. Sign by either entering the account password or by submitting a handwritten signature in the signature field. By signing an entry, the signer is certifying that he/she has performed the experiment and/or created this entry.




The date of the signature and the name of the signee will appear in the footer of the entry together with a unique hash sum related to the specific entry.



**!** **NOTE:** After creating a digital signature, the document cannot be edited anymore.

●●● To create an editable copy of the signed entry:


1. Click on the gearwheel, , on the entry header
2. Click on the *Copy to end* function to create an editable copy of the entry
3. **Optional:** *Hide* the signed entry

### Countersign entry with digital signatures

After signing, the document can be sent to a witness for countersigning. To become a witness, the following requirements must be fulfilled:

- To be a member of the same group in which the project and the document are being shared.
- To have the *Sign and Witness* app installed, to be able to countersign entries.

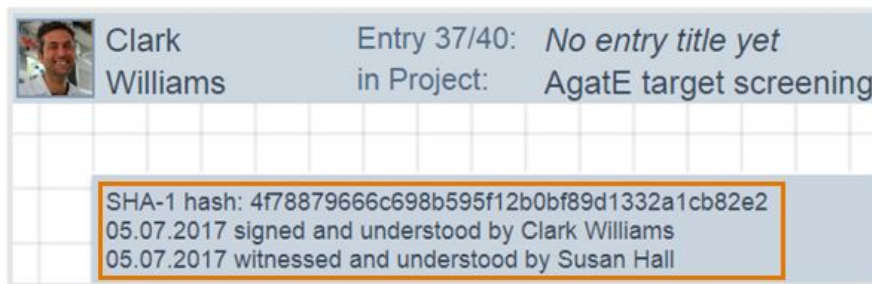
**!** **NOTE:** Be sure that your content is shared with the user who will be the witness for countersigning. To adjust the share settings of a project:

1. Go to *Manage > Projects*
2. Click on the gearwheel, , located between the “*Last modified*” and “*Created*” columns in every project entry row.
3. Click on “*Share settings*” function
4. Check the users you want to share your project with.
5. Click on *Save*

●●● To countersign an entry from the *Notifications* or from *Dashboard > Witnessing*:

1. Click on the notification or go to *Dashboard > Witnessing*. The countersigning request can be seen. Click on it.
2. The entry to be countersigned will be opened.
3. Click on the *Witness* button, located at the bottom of the entry, to countersign.
4. Countersign by either entering the account password or by submitting a handwritten signature in the signature field. By signing an entry, the witness is certifying that the entry has been disclosed to and understood by him/her.

The name of the countersigner and the date of the second signature will be added to the footer of the entry.



## Data safeguarding

### Safeguarding data in labfolder

In labfolder, invalid data cannot be deleted in accordance with laboratory documentation guidelines like GLP or ISO standards.

### Removing data from an entry

Within an entry, data blocks can be removed by clicking on the ▼ icon (top-right corner of the data block) and then choosing the *Remove* option. The data block will be removed, but is still accessible (and downloadable if it's a file) from within the full audit trail.

### Removing entries

Entries can be removed as well by clicking on the gearwheel, ⚙️, and then choosing the *Hide* option. Removed entries are only hidden from the view and are not being deleted, and a pop-up will inform the user of this fact.

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## Removing projects

When choosing the *Remove* option in the project settings, the user will be prompted whether the project should be removed or completely deleted. The delete option is only available if the admin settings of the group allow users to remove any content.



### Controlling project deletion in groups

In groups, the [administrator can prevent users from deleting projects](#) (and thus any data at all) by choosing the corresponding option in the group settings.