

# Benchling Best Practices

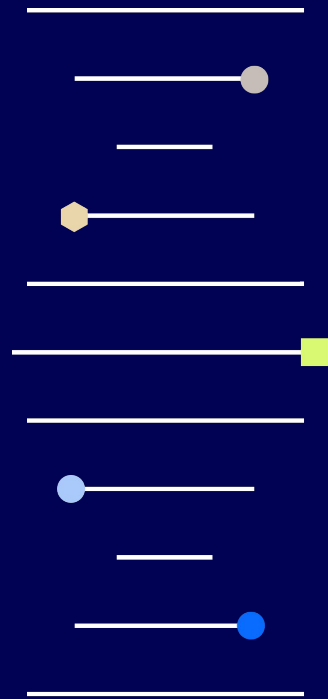
Training & Onboarding New Users



Benchling



# Build Benchmarking Superstars

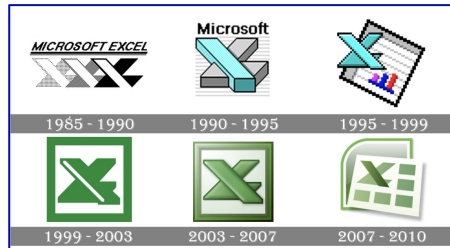


# Empower Users to Solidify a Central Source of Truth

**It can be important to establish a structured and consistent onboarding process for your new users. This ensures:**

- An organized Benchling Environment
- Consistent data structure and processes
- Scientists who are empowered on the system

Educate your team on the value of maintaining a central source of truth through trainings and documented guidance on how YOU use your Benchling!



***We know change can be difficult and scary!*** 😞

Here's a throwback example that may help explain why you've made the investment – *Do you remember the first time you tried using Excel? What would you do without Excel now? What would you tell yourself when you were first starting to use Excel?*

# Quickly Enable Users to Utilize Benchling



Upon completing onboarding, new scientists should have a basic understanding of Benchling\*:

## Navigating Benchling



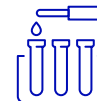
1. Using core Benchling functionality (Notebook, Registry, Inventory, etc)
2. Understanding how Projects/Folders are structured
3. Where to training materials (i.e. Implementation videos)
4. Where is the Benchling Calendar & what is visible there

## Day to day work on Benchling



1. What the scientist be doing on a daily basis
2. What application access will be required
3. How to register a sample
4. Creating entries from a template
5. Sending entries for review

## Team Specific Procedures

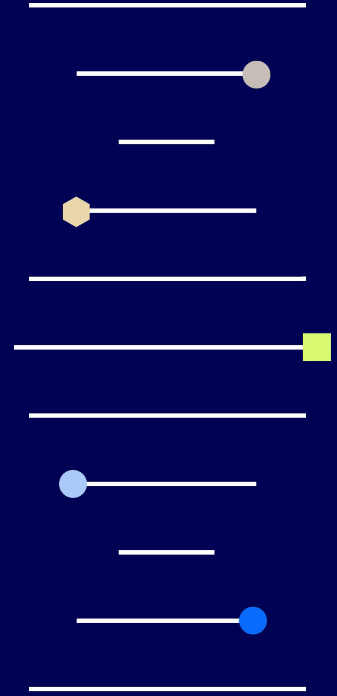


1. The order plasmids must be created and registered
2. Using the bulk assembly tool
3. Which templates a team should use
4. Data integrity/quality requirements
5. Who to ask for help

\*Note: The list is an example of some common understandings during onboarding. Customers should adjust to their specific needs.



# Implement Effective Training Tools



# Benchling Learning Labs

Benchling Curated Courses, Ready to Go

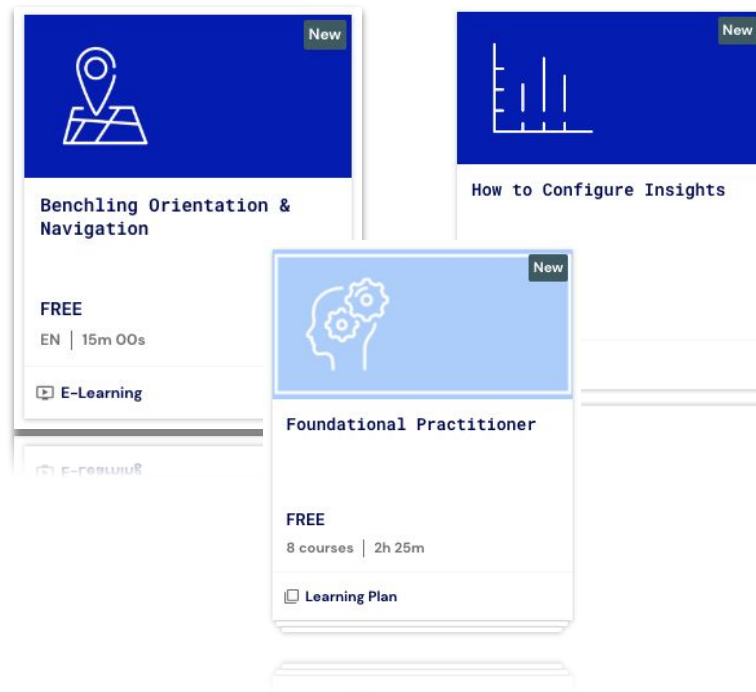
[The Benchling Learning Labs](#) is a FREE training base for all things Benchling, created with best practices in mind. Scientists can get started with “How to” Lessons and Foundational Courses, or sharpen their skills and level up with advanced Benchling courses!

## Recommended Lessons for Onboarding New Users:

- [Benchling Orientation & Navigation](#)
- [Foundational Practitioner](#)

## Other helpful courses to get started:

- [How to Use the Notebook](#)
- [How to Use the Registry](#)
- [User Management, Access, and Permissions](#)



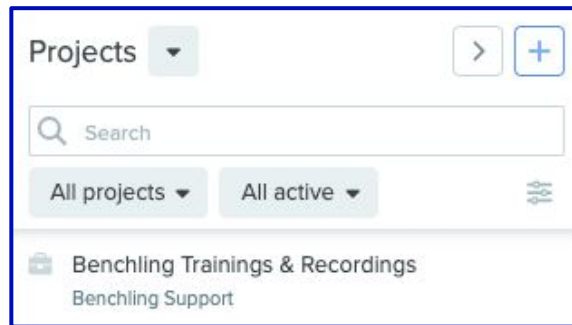


# Leverage Training Recordings

*Benchling Provided Recordings make initial Training materials easy to build*

Free video resources are available to you and your team from a number of Benchling sources:

- Your implementation manager left some resources for you in a “Benchling Training Project” – these trainings are customized for your team’s rollout, so keep them handy!
- [Our Benchling Bootcamps](#) are a great resource – these monthly videos are constantly updated to explain new product features to deep dive on a given subject, If you attend live, you’ll be able to ask questions and learn from experts.



[http://events.benchling.com/  
bootcamplelabelprinting](http://events.benchling.com/bootcamplelabelprinting)

## Benchling Bootcamp: Label Printing

April 25th, 2023 | 9:00am - 10:00am

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## Benchling Bootcamp: RNA & Modified Biomolecules EMEA

March 30th, 2023 | 2:00pm - 3:00pm

Whether you include these as a required training or an optional additional training, we recommend you make these available for your team to review whenever they need refresher trainings.

# Join the Online Benchling Community

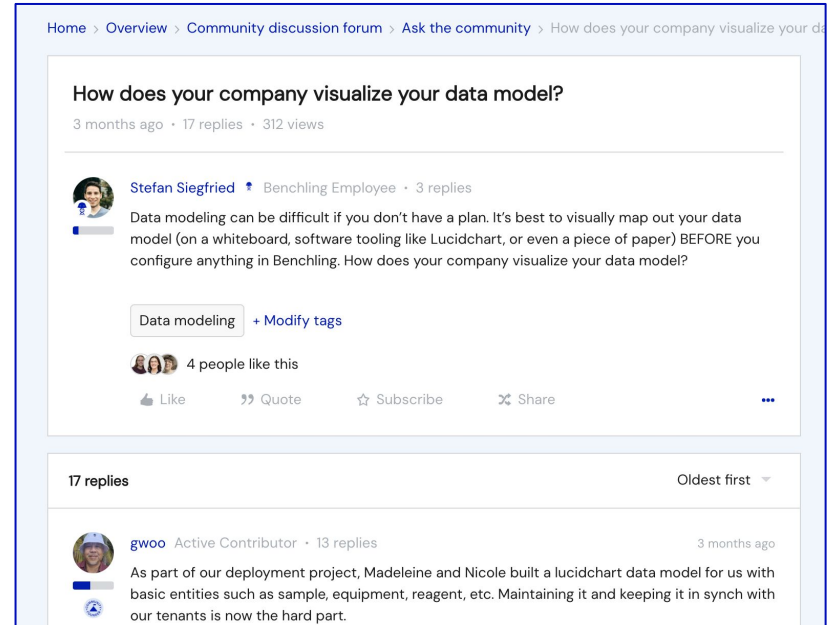
*Leverage the community for new users to learn from other peers!*

Join today at [community.benchling.com](https://community.benchling.com)

The Benchling online community is a space where customers can share, learn, and connect with each other on all things Benchling.

Sign up today to:


- Connect with other Benchling customers
- Ask questions to your peers
- Share your ideas with our product team
- Jump into Benchling best practices guides



Home > Overview > Community discussion forum > Ask the community > How does your company visualize your data model?


### How does your company visualize your data model?

3 months ago · 17 replies · 312 views

 **Stefan Siegfried** · Benchling Employee · 3 replies


Data modeling can be difficult if you don't have a plan. It's best to visually map out your data model (on a whiteboard, software tooling like Lucidchart, or even a piece of paper) BEFORE you configure anything in Benchling. How does your company visualize your data model?

Data modeling + Modify tags

 4 people like this

Like Quote Subscribe Share

17 replies Oldest first

 **gwoo** · Active Contributor · 13 replies · 3 months ago

As part of our deployment project, Madeleine and Nicole built a lucidchart data model for us with basic entities such as sample, equipment, reagent, etc. Maintaining it and keeping it in synch with our tenants is now the hard part.



# Develop an internal Training Guide

*What are the key process unique to your lab?*

Healthy habits are established on the first day, so it's important to train your team on unique processes from the start. Below are some questions to consider when outlining your internal requirements.

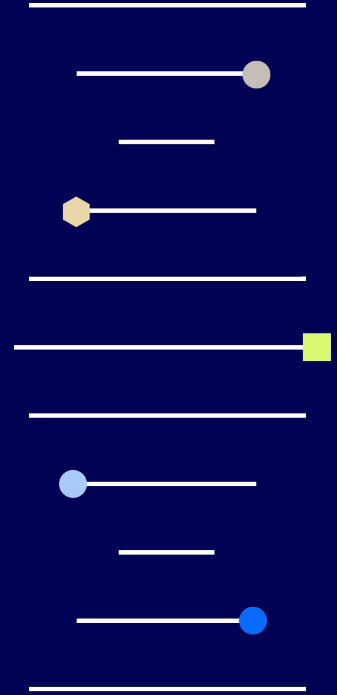
## Questions to think about:

- How do you organize your experiments in Benchling?
- Do your process apply company wide, or are they specific to one team?
- What templates are used most often, on a daily or weekly basis?
- How are you registering new samples?
- How are you capturing results?
- What processes require manager approval?



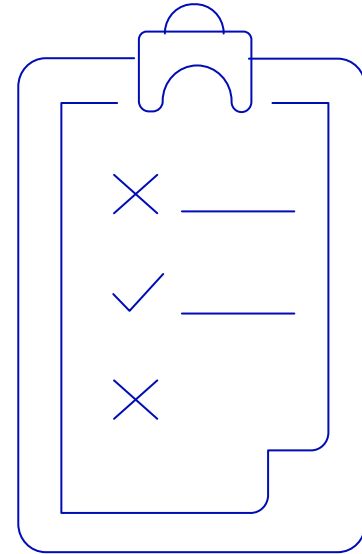


# Developing a Training Guide



# How to create your Onboarding Guide

1. **Determine the structure and order of your onboarding**
2. **Centralize a location for all training materials and resources**
3. **Assign Super Users** responsible for training new users
  - a. *Have a small team? Let your new teammate know who has the best knowledge on specific applications or processes!*



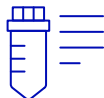
**TIP: Consider these subjects for each application as you develop your teams' specific guidelines**

## Notebook



- Creating an entry from template
- Submitting an entry for review
- Requesting a new template/ template collection

## Registry



- When do I register an entity?
- What if I need to unregister an entity?
- Requesting schema changes

## Inventory



- How to navigate
- How to check out an item?
- How to update items in bulk?

## Molecular Bio



- How to check out an item?
- How to update items in bulk?
- How to link entities in the Notebook?

# Use your Test Tenant as Your Training Home Base

Keeping your Test Tenant for Onboarding & Training is Key way to Stay Organized

**Don't have a test tenant?  
Contact  
[support@benchling.com](mailto:support@benchling.com)  
to discuss your options**

Jeffylabtest.benchling.org

The screenshot shows the 'Settings' page for a test tenant. The 'Feature settings' option is highlighted with a green box. Other options include 'Molecular biology settings', 'Data export', 'Help', 'Create or join organization', and 'Sign out'.

The screenshot shows the settings sidebar with 'LAB NOTEBOOK SETTINGS' highlighted in green. The sidebar includes sections for 'INVENTORY SETTINGS', 'LAB NOTEBOOK SETTINGS', 'AUTOMATION SCHEMAS', 'RESULT SCHEMAS', 'REQUEST SCHEMAS', and 'PERMISSIONS SETTINGS'.

- Create a new Template Collection for Benchling Onboardings & Trainings
- When a new user joins your team, they can create their own training folder within the test tenant
- Each Training Module can be a new template / entry
- You can require approval from a manager or senior teammate to ensure completion

The screenshot shows the 'Template Collections' page for 'Benchling Onboarding & Training'. A table lists several templates, with the first five rows highlighted in green. The table has columns for NAME, TYPE, AUTHOR, CREATED, and LAST MODIFIED.

NAME	TYPE	AUTHOR	CREATED	LAST MODIFIED
0.0 Level 1 Certification (Welcome to Benchling!)	Template	Benchling Support	10/13/2023	10/13/2023
1.0 Navigation - [Your Name]	Template	Benchling Support	10/13/2023	10/13/2023
1.1 Notebook - [Your Name]	Template	Benchling Support	10/13/2023	10/13/2023
1.2 Registry & Inventory - [Your Name]	Template	Benchling Support	10/13/2023	10/13/2023
1.3 Molecular Biology [Name]	Template	Benchling Support	10/13/2023	10/13/2023
Welcome to JeffyLab!	Template	Benchling Support	10/13/2023	10/13/2023



# Develop your Onboarding Processes

Key questions to guide you through this process



## Content Purpose & Overview

- **What lesson** do you want your users to learn from a document?
- **What should users be able to accomplish** once they've reviewed this guide?
- **Where to go** if further guidance is required?

## Best Practices

- What are the **key aspects of your processes** that your team needs to know?
- What **specific data needs to be included** in an experiment?
- **Do these best practices affect** one team or your whole organization?

## Admin Team

- **Who is responsible** for maintaining your Benchling environment?
- **Who do you contact** to make changes or modifications to a schema?
- **Who can provision** project or application access?

## Training Resources

- **What tools will you use** to train your new hires?
- Do people know **where to access resources**?
- Does your new hire have **someone to shadow**?
- Do you have a **test tenant** to train users on

# Resources for Onboarding

[Benchling Learning  
Labs Home Page](#)

[Benchling Bootcamp Home  
Page](#)

[Benchling Best Practice  
Guides](#)

[Benchling Community Home  
Page](#)