



Apr 30, 2019

Working

How to create a new protocol

Version 14

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dx.doi.org/10.17504/protocols.io.z99f996

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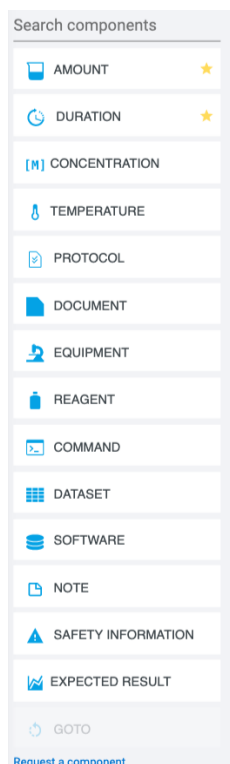
Anita Bröllochs
protocols.io

ABSTRACT

This protocol describes how to create a new protocol on protocols.io.

GUIDELINES

protocols.io allows you to add as much detail as needed to your protocol. On the right-hand side of the editor, you can find components that allow you detailed information. Using components such as for example duration will help you and others save time while running the experiment as there will be a set timer available in the run.



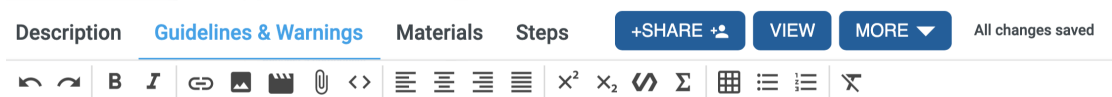
components

Components include:

- **Amount:** use if there is a specific amount of a reagent needed. The "scale" functionality in an experiment run will allow you to easily scale the protocol if this component is used.
- **Duration:** add timers to your protocol.
- **Concentration:** adding exact concentration details.
- **Temperature:** select between a specific temperature or room temperature.
- **Equipment:** search for existing equipment or create a new one adding details such as brand, SKU, and specifications of the equipment.
- **Reagent:** search for available reagent or add a new one. The reagents will have catalog numbers that can link directly to the vendors site where the exact reagent can be purchased.

- **Command:** for computational workflows, add your command lines.
- **Dataset:** make your dataset available and link to it with this component.
- **Software:** add the software you used for your methods.
- **Note:** if you need to additional notes for a step, you can add them with this component.
- **Safety Information:** if a step includes hazardous materials, mark them clearly with the safety information component.
- **Expected Result:** let the reader know which result is expected after certain steps.
- **Goto:** if steps are repeated throughout the process you can link to previous steps with this component.

In addition to the components you can work with to make your protocol as detailed as possible, you can find some additional features on the top that let you add links, images, videos, files, formulas, and tables to your protocol for any step.

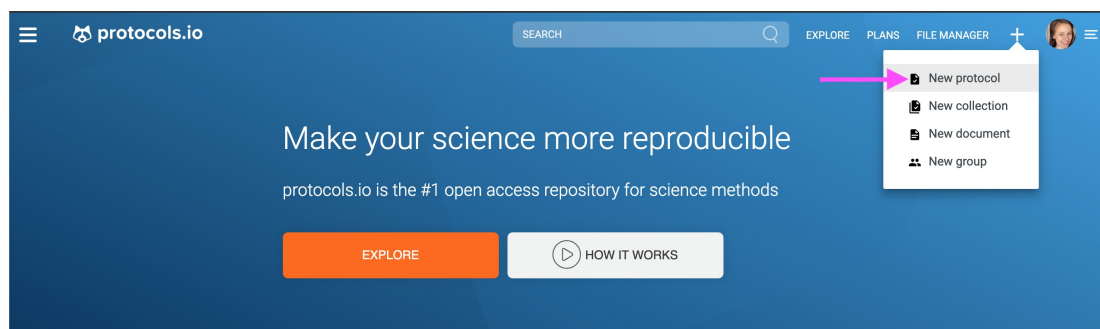


BEFORE STARTING

All edits you make to the protocol will save automatically.

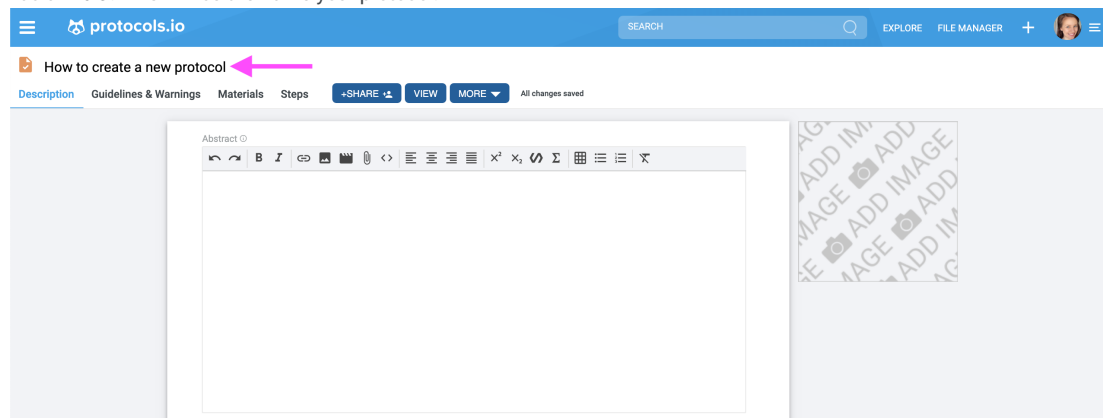
Starting new protocol

- 1 Click on the + icon in the upper-right corner to open the main menu, and select 'New protocol'.

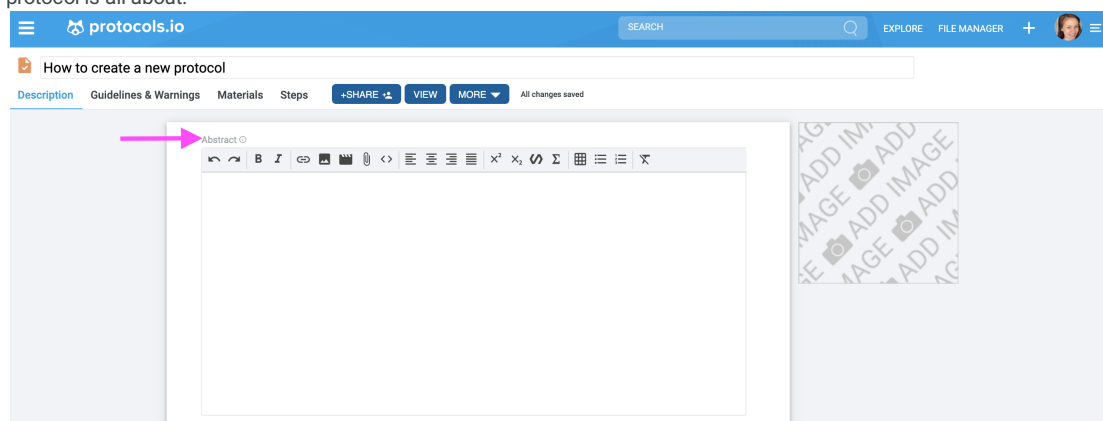


Adding Protocol Description

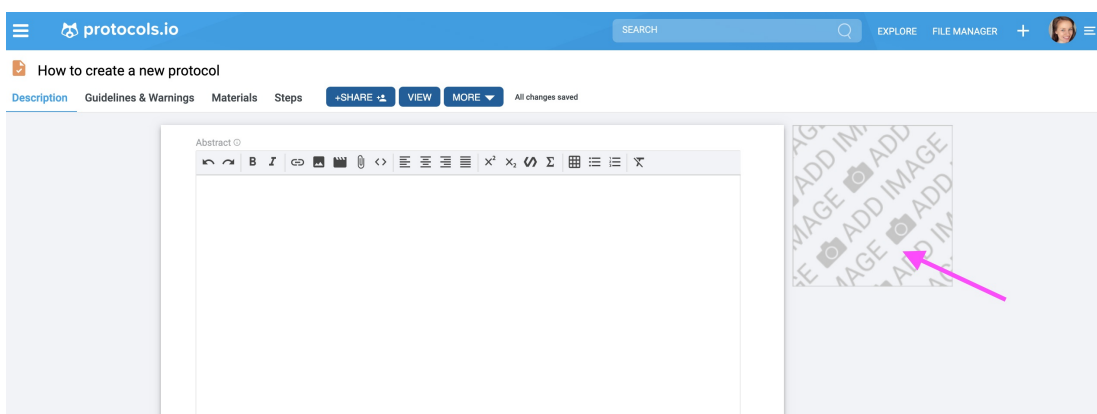
- 2 Add a **Title**. This will be the name your protocol.



- 3 Add an **abstract**. This should be short description of your protocol. It should put your protocol in context and let the reader know what your protocol is all about.



- 4 For better discoverability, add a **thumbnail image** to your protocol. This could either be a picture of your experiment, your results, or your institution logo.



- 5 Add all **authors** of this protocol.

Enter several author names separated by commas (you can also add affiliation in square brackets)

Alexei Stoliarchouk

[Add myself as an author](#)

Lenny Teytelman
protocols.io

ADD

Names should be separated with commas.
Affiliation: if possible, please add the name of the author's lab and/or institute as an affiliatio

- 6 Add **keywords** to your protocol that will help you to organize you protocols and make it more discoverable for others when published.

Keyword, separated by commas. Keywords are topics that define your protocol and help discover it

- 7 Optional: add an **External Link (URL)** if there is any link to your lab website, publication or any further information.

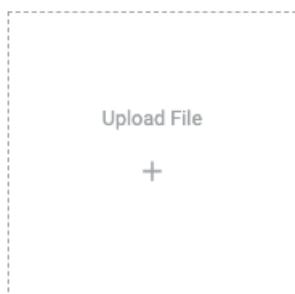
External Link

- 8 If the protocol is part of a published manuscript, you can add the **Manuscript Citation**.

If this protocol is part of a published manuscript, please add the full citation here

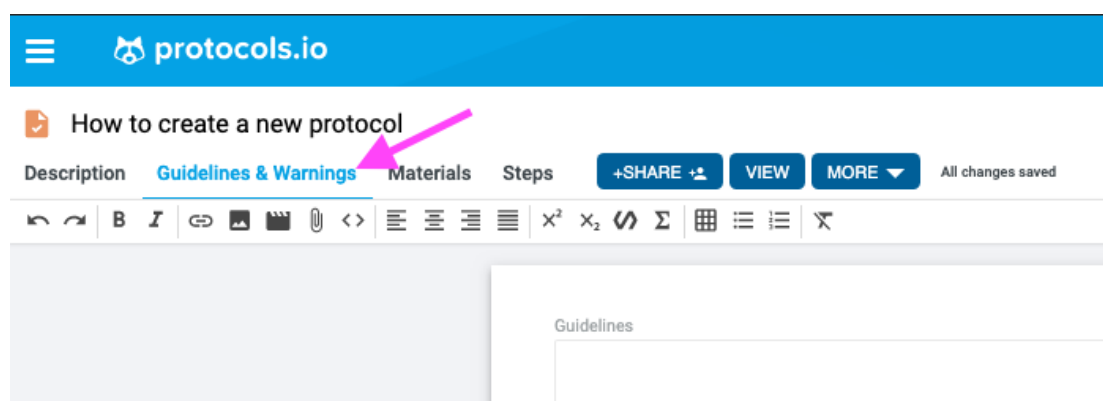
Manuscript Citation ?

- 9 You can make your original protocol **file** available by attaching it to the protocol as reference.



Adding Guidelines & Warnings

- 10 Navigate to the **Guidelines & Warnings** tab on the top of the protocol editor.



- **Warnings:** add any specific warning related to your protocol

- 11 **Guidelines:** this space is for any guidelines, references and other useful information to accompany the protocol.

- 12 **Before Start:** this section allows you to add any needed preparations or information the reader should be aware of before starting the experiment. In the view and run modes, this section will appear right before the first step of the protocol.

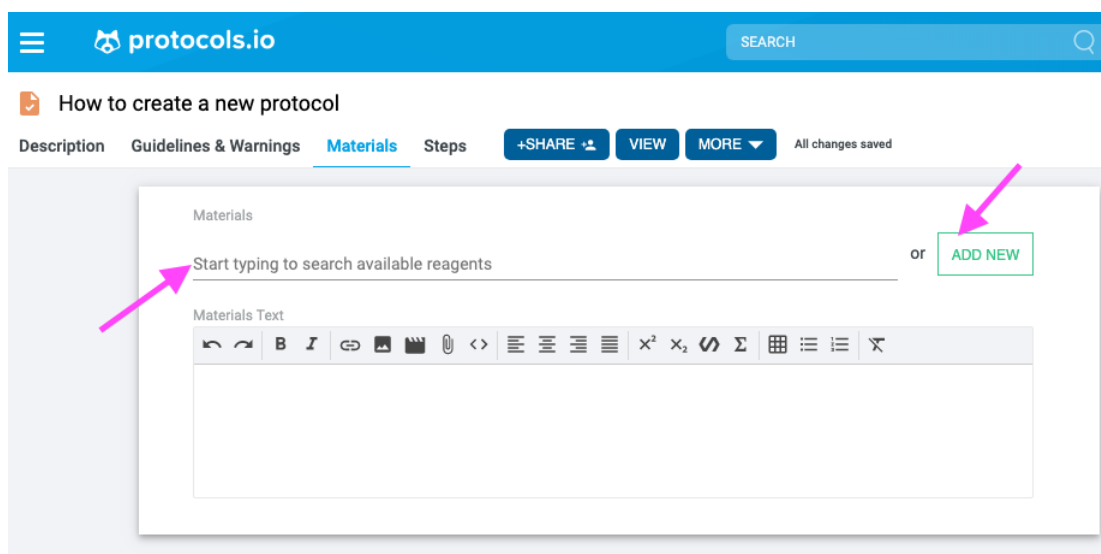
13 **Safety Warnings:** Please add any hazard or safety precautions here if your protocol includes working with hazardous materials.

14 **Sensitive Content Warning:** If your protocol contains sensitive content that some people may find disturbing please make sure this checkbox is checked. This will give a warning to readers when opening the protocol.

☒ Sensitive Content Warning ⓘ

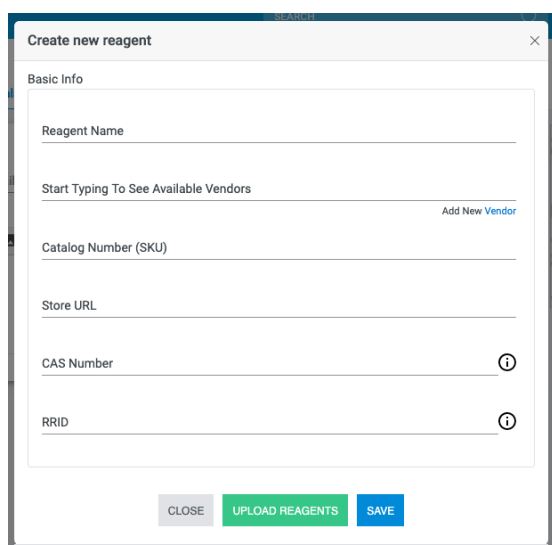
Adding Material

15 You can either search for existing reagents or add a new one.



The screenshot shows the 'How to create a new protocol' page on protocols.io, specifically the 'Materials' tab. The page has a blue header with the protocols.io logo and a search bar. Below the header, there are tabs for 'Description', 'Guidelines & Warnings', 'Materials' (selected), and 'Steps'. There are also buttons for '+SHARE', 'VIEW', and 'MORE'. A status bar at the bottom says 'All changes saved'. The main content area is a modal window titled 'Materials'. It has a search bar with the placeholder text 'Start typing to search available reagents' and a green 'ADD NEW' button. Below the search bar is a 'Materials Text' section with a rich text editor toolbar and a text area. Two pink arrows point to the search bar and the 'ADD NEW' button.

16 If you are creating a new reagent, you will be asked to add the following information to it.



The screenshot shows the 'Create new reagent' form. It has a title bar with a close button. The form is divided into a 'Basic Info' section and a 'Reagent Name' section. The 'Basic Info' section contains fields for 'Reagent Name', 'Start Typing To See Available Vendors' (with an 'Add New Vendor' link), 'Catalog Number (SKU)', 'Store URL', 'CAS Number' (with an info icon), and 'RRID' (with an info icon). At the bottom of the form are three buttons: 'CLOSE', 'UPLOAD REAGENTS', and 'SAVE'.

17 When you're done entering all information about the new reagent, click the SAVE button.

Create new reagent

Basic Info

Reagent Name

Start Typing To See Available Vendors [Add New Vendor](#)

Catalog Number (SKU)

Store URL

CAS Number ⓘ

RRID ⓘ



If you would like to import multiple reagents in bulk, you can do so by clicking the UPLOAD REAGENTS button which will ask you to upload a CSV text file with the required information.

- 18 Any additional information about required materials can be added to the Materials Text box.

Materials Text

Entering protocol steps

- 19 You have 2 ways to add steps in the protocol:

1. Entering protocol steps from an existing text document that includes a numbered or bulleted list of steps.
2. Entering protocol steps from scratch.

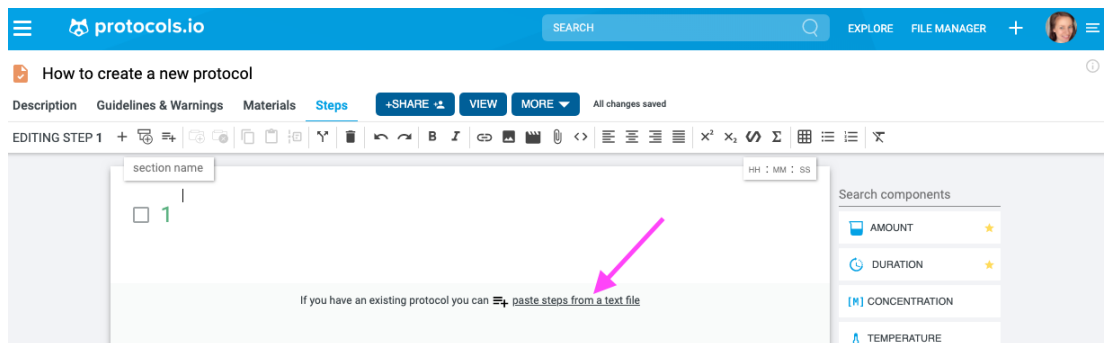
step case

Entering steps from text

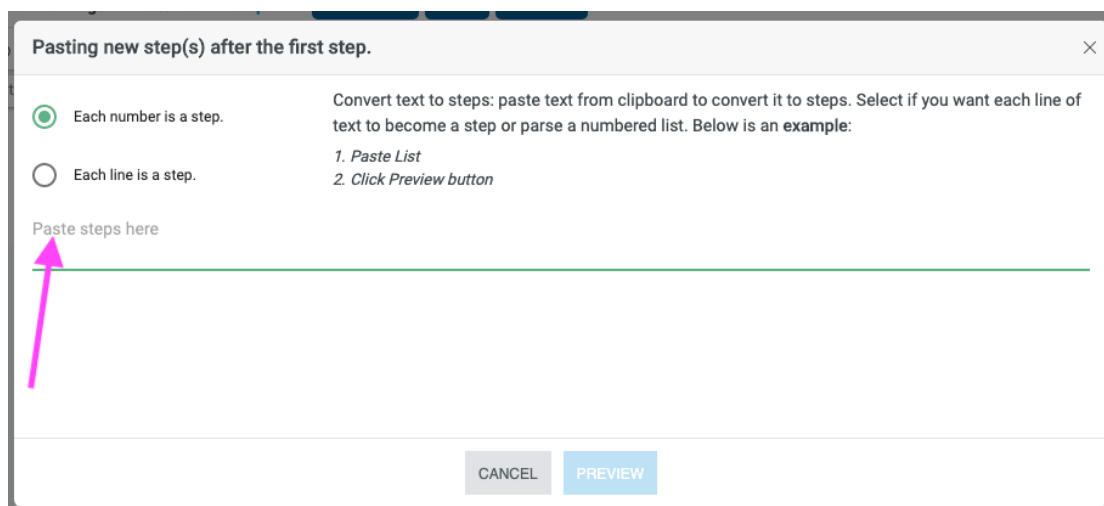
You already have an existing text file that includes a numbered list of all protocol steps.



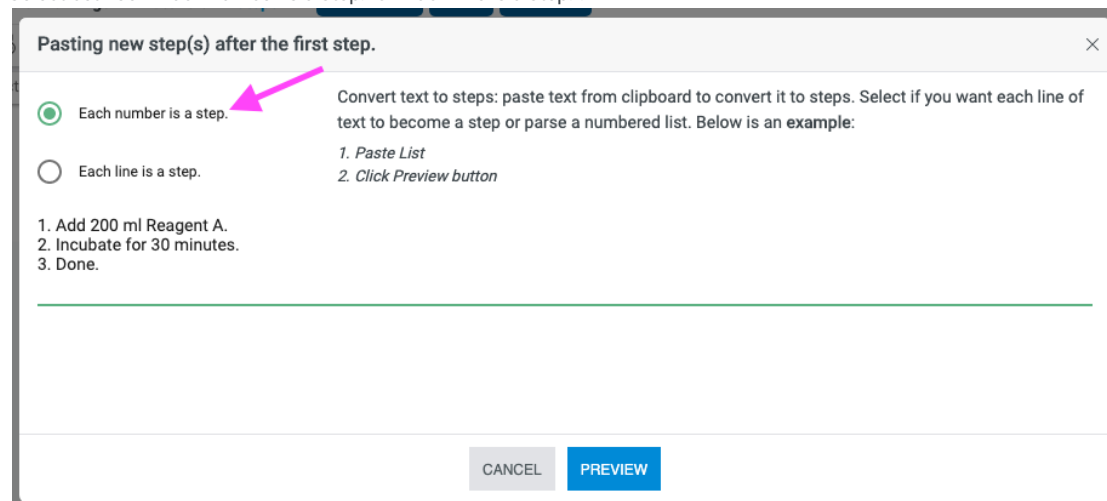
- 20 Click on "paste from a text file".



21 Paste your steps into the window that opened up.

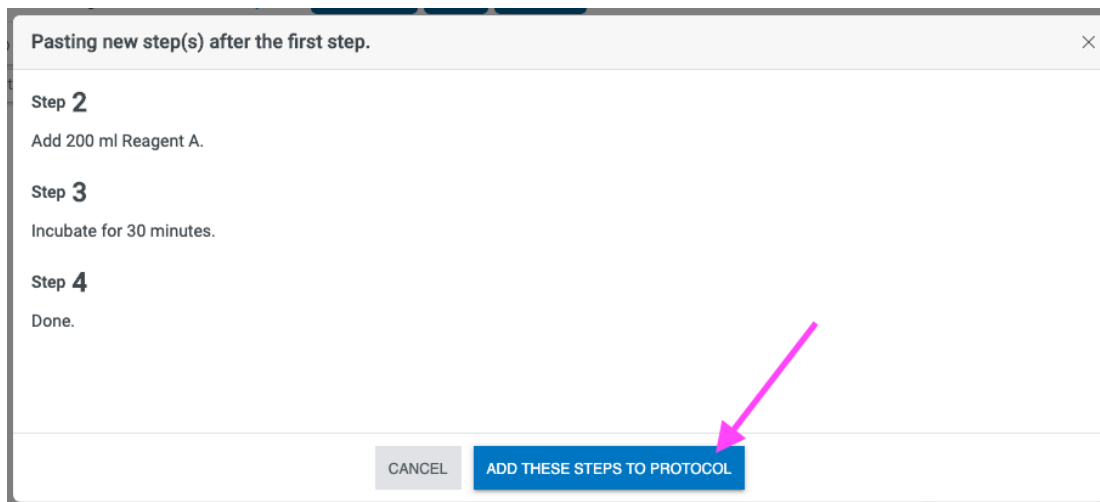



22 Select between "Each number is a step." or "Each line is a step."



23 Click the PREVIEW button.

24 If the preview looks good, click the ADD THESE STEPS TO PROTOCOL button.



 Your steps will be added to the protocol.

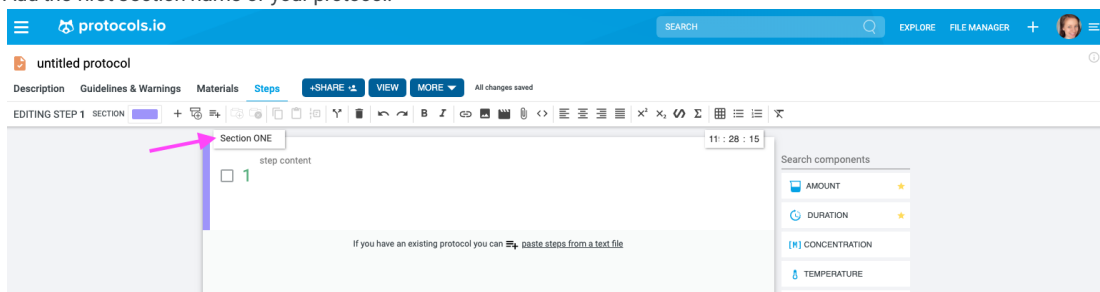
- 25 You can now edit your protocol further by introducing sections and using the components on the right hand side. Additional information regarding the components can be found in the Guidelines section of this protocol.

step case

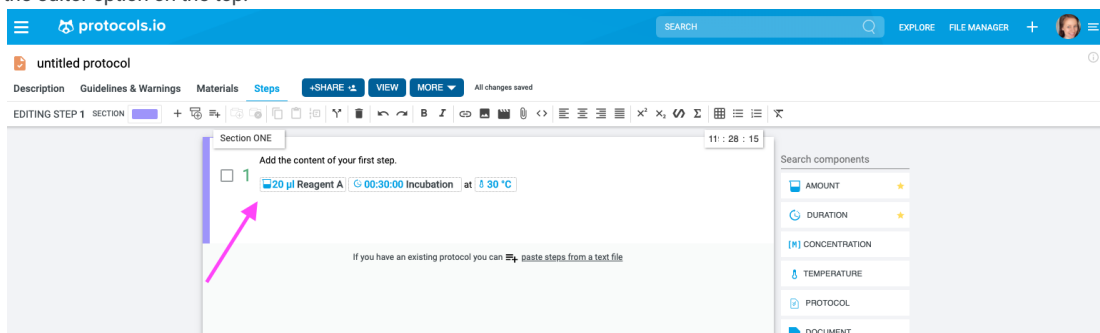
Entering protocol steps from scratch

no description provided

- 20 Add the first section name of your protocol.

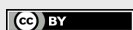


- 21 Add the content of the first step while using the components on the righthand side. You can also insert images, videos, formulas, etc. with the editor option on the top.





Additional information about the available components can be found in the Guidelines section of this protocol.



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