

✓ = Included in role-based path All courses include learning objectives, hands-on tutorials, quizzes, and knowledge checks.

Lesson	Description	Time (min)	Included in Path			
			Admin	Developer	End-User	End-User Quick Start
Sapio Design Principles						
Overview	Learn Sapio's core design principles that guide platform configuration and design, ensuring consistency, scalability, and usability across the system.	15–20	✓	✓	✓	
Basic Navigation						
Home Page	Learn the fundamentals of navigating Sapio's interface.	10–15	✓	✓	✓	✓
Search Features	Use search, saved views, and record filters effectively.	10–15	✓	✓	✓	✓
Knowledge Graph and Favorites	Explore Sapio's knowledge graph and create favorites.	10–15	✓	✓	✓	✓
Sapio AI Features (In Progress)						
ELaiN	Create an experiment, mine inventory, and add entries.	10–15	✓	✓	✓	✓
Support Agent	Ask product-use question and create code webhooks.	10–15	✓	✓	✓	✓
Configuration and Administration						
User and Group Admin	Configure users, roles, permissions, and toolbars.	15–25	✓	✓		
User Manager	Manage individual user accounts and privileges.	10–15	✓	✓		
Group Manager	Create and assign user groups for scope control.	10–15	✓	✓		
Session Manager	Manage and monitor active user sessions within Sapio, including login activity and session termination options.	10–15	✓	✓		
Toolbar Designer	Customize toolbars based on user roles and workflows to improve navigation and usability.	10–15	✓	✓		
Theme Manager for Admins	Customize the platform's visual theme and branding.	5–10	✓	✓		
Theme Manager for End-Users	Select and preview themes assigned by your admin, and review available personal display options.	5–10	✓	✓	✓	✓
Data Visualization & Insights						
Charting and Analytics	Create data visualizations and dashboards.	15–25	✓	✓	✓	✓
Data Designer						
Overview	Understand the purpose of Data Designer and how it structures data within the Sapio Platform.	15–20	✓	✓		
Create a Data Type and Set Attributes	Create new Data Types, define attributes, and understand how they shape data objects.	15–20	✓	✓		
Configure Data Type Relationships	Build relationships between Data Types to establish data hierarchy and connectivity.	15–20	✓	✓		
Add Data Fields	Add and configure data fields to capture and display key information within records.	15–20	✓	✓		
Create and Assign Layouts	Design and assign layouts to visualize and interact with Data Types effectively.	15–20	✓	✓		
Materials Management						
Overview	Introduction to managing materials and registries in Sapio.	15–20	✓	✓	✓	✓

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General Admin Settings	Configure default settings and permissions for material registries.	15–20	✓	✓		
Create a Registry (Material Type)	Create and define material registries and their attributes.	15–20	✓	✓		
Create a Part Type in a Registry	Add a Part Type to a Material Registry and set a reorder quantity.	15–20	✓	✓	✓	✓
Add Items to Registries	Add materials to a registry and configure details.	15–20	✓	✓	✓	✓
Create a Formulation	Define and link multiple material parts to create a formulation.	15–25	✓	✓	✓	✓
Storage Management						
General Settings	Explore how samples are stored and tracked across container hierarchies.	5–20	✓	✓		
Create Hierarchy and Storage Units	Manage storage hierarchy and the units within.	15–20	✓	✓		
Add Samples to Storage	Learn how to add items to inventory.	15–20	✓	✓	✓	✓
Remove Samples from Storage	Track storage and retrieve items from inventory.	10–15	✓	✓	✓	✓
Sample Management						
Managing Sample Types	Introduction to managing sample types.	10–15	✓	✓		
Sample Subtypes Configurations	Introduction to configuring and managing sample subtypes.	10–15	✓	✓		
Register Samples	Walk through registering samples with metadata.	15–20	✓	✓	✓	✓
Receive Samples	Receive and record incoming sample deliveries.	15–20	✓	✓	✓	✓
Request Samples	Tutorial on sample request workflows and management.	10–15	✓	✓	✓	✓
Instrument Management						
Register/Add an Instrument	Register and configure instruments, including result parsing.	15–20	✓	✓	✓	✓
Schedule and Perform Instrument Maintenance	Schedule and perform on-demand or routine instrument maintenance, and manage maintenance notification settings.	15–20	✓	✓	✓	✓
SDMS, File Bridge, and Barcode Label Printing						
SDMS, File Bridge, and Barcode Label Printing for Admins	Set up File Bridge connections, register label printers as instruments, and create barcode configurations for label printing.	20–25	✓	✓		
SDMS, File Bridge, and Barcode Label Printing for End-Users	Print barcodes and labels for samples and experiments using printers configured by your admin.	10–15	✓	✓	✓	✓
Experiment Engine						
Overview	Introduction to Sapio's Experiment Engine and its core features for experiment design and execution.	15–20	✓	✓	✓	✓
Add Samples to an Experiment	Learn how to add and manage samples within an experiment workflow.	15–20	✓	✓	✓	✓
Record Experiment Notes	Capture observations and structured data using experiment note entries.	15–20	✓	✓	✓	✓
Track Materials in Experiments	Track material usage and inventory interactions during experiment execution.	15–20	✓	✓	✓	✓
Design Plates and Manage Aliquots	Compare 3D Plate Designer and Aliquot/Pool Entry tools for efficient experiment setup.	15–20	✓	✓	✓	✓

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Track Instruments and Record Results	Record instrument activity and capture analytical results in experiment workflows.	15–20	✓	✓	✓	✓
Build Experiment Templates and Protocols	Create reusable experiment templates and protocols for consistent design and execution.	15–20	✓	✓	✓	✓
Process Manager						
Overview	Introduction to Sapio's Process Manager and how Experiment Processes and Custom Processes route records through lab workflows.	10–15	✓	✓	✓	✓
Create an Experiment Process	String together activated experiment templates to form an Experiment Process, and add QC and turn-around-time thresholds to each step.	15–20	✓	✓		
Create a Custom Process	Build a Custom Process to navigate to a record, launch a new experiment, open a custom view, or call a webhook.	15–20	✓	✓		
Home Pages						
Overview	Introduction to Sapio Home Pages and the components admins can display for each user group.	10–15	✓	✓	✓	✓
Home Page Layout Manager	Create, manage, and assign Home Page layouts – including tables, charts, searches, and calendars – to different user groups.	15–20	✓	✓		
Rules Engine						
Rules Engine	Automate system behavior using Sapio's no-code Rules Engine. Create conditional rules to update fields, route records, and trigger actions like e-signatures or scheduled tasks.	15–20	✓	✓	✓	
IT Topics						
Hosting Architecture	Overview of infrastructure and deployment models.	15–20	✓	✓		
Synergies and Export/Import for Deployment	Transfer configuration data across instances.	15–20	✓	✓		
Automation & Integration (IT & Deployment Topics)						
IT Topic - Hosting Architecture	Learn about Sapio's hosting models and deployment architectures.	10		✓		
IT Topics - Synergies and Export/Import for Deployment	Learn how to migrate, export, and import configurations for deployment.	10		✓		
Python and REST API	Explore Sapio's REST API using Swagger and Python scripting.	20–25		✓		
Webhook Prerequisites	Prepare your environment for webhook testing.	3–4 hours		✓		
Webhook Fundamentals	Learn webhook invocation types and how to build one.	25		✓		
Advanced Webhooks	Connect to an external service and process search results.	25		✓		
Estimated Total Time per Path			~12–16 hrs	~16–22 hrs	~6–9 hrs	~6–8 hrs
Sapio Modules (Standalone feature training based on licensing)						
QC LIMS	Configure test methods and sampling plans, register batches, record and validate QC results, and generate Certificates of Analysis and Release.	60–90				
Biorepository	Manage biorepository samples across sites – create locations and biobanks, register and receive samples, handle shipment requests, and destroy samples when required.	60–90				

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Bioanalysis	Design and validate bioanalytical assays, execute analysis runs, and interpret curve fits, QC/STD performance, and concentration results.	60–90				
Immunogenicity (IgX)	Configure Screening, Confirmatory, Titer, and NAb assays to investigate anti-drug and neutralizing antibodies, and connect validated assays to a study design.	60–90				
NGS						
NGS	Follow the out-of-the-box Next-Generation Sequencing workflow from sample registration through DNA extraction, library prep, pooling, and sequencing run setup.	60–90				
NGS High-Throughput	Use plate-based experiment templates to process large sequencing batches, including plate-level QC, indexing, pooling, and run setup.	60–90				
Stability						
Stability	Initiate and manage stability studies, define test parameters and intervals, record results, and generate stability reports.	60–90				
Chemistry (In Progress)						
ChemELN Basics	Introduction to capturing synthetic and medicinal chemistry experiments in Sapio's Chemistry ELN.	60–90				
Chemistry Registries	Introduction to chemical registries – registering compounds and performing the structure cleanup and uniqueness checks used during registration.	60–90				

Course availability subject to change. Questions? [Contact your Sapio training representative.](#)