

Job Aid

BD FACSDiva™ Software:

Exporting and importing templates

This job aid contains instructions for creating and using templates in BD FACSDiva™ Software. For more information about templates, see the *BD FACSDiva™ Software Reference Manual*.

Templates overview

Template type	When to use	See page
Experiment	To reuse a defined experimental setup for subsequent experiments	2
Panel (specimen)	To run the same panel of tubes in another experiment or combine different panels in a single experiment. Use as an analysis template, or prior to analysis to use as a panel analysis template.	3
Plate	To reuse a defined plate for subsequent experiments	5
Analysis	To reuse the same worksheet for subsequent experiments	6

Guidelines

Cytometer settings: Remove embedded cytometer settings from your experimental elements before exporting as a template to ensure that the latest cytometer settings are applied to any imported templates. Ensure that the cytometer settings parameters match to avoid mismatched parameters and greyed out plots.

Categorizing your templates:

- **Template names:** Give meaningful names to your templates to make them easily recognizable later.
- **Types:** Group templates by type, so they are easier to find later. Type names cannot include any of the following characters: \ / : * ? " < > | , .
- **Comments:** Add comments to provide additional information about your template. The comments are displayed in the import template wizard to help define the template.

Locked templates: Select the Lock Template checkbox to lock exported templates. A locked template means that it cannot be overwritten by a template with the same name. Changes can still be made to a locked template once it is imported into the browser.

Managing templates: Manage the template files to remove outdated templates, fix errors, and ensure that the latest version of each template is being used.

Exporting and importing an experiment template

Experiment templates are cytometer configuration specific, ensure that you are using the correct configuration prior to creating or using an experiment template.

Exporting an experiment template

Once your experiment has been prepared to become a template, you can export the experiment as an experiment template.

- 1 In the Browser, right-click an experiment and select **Export > Experiment Template**.

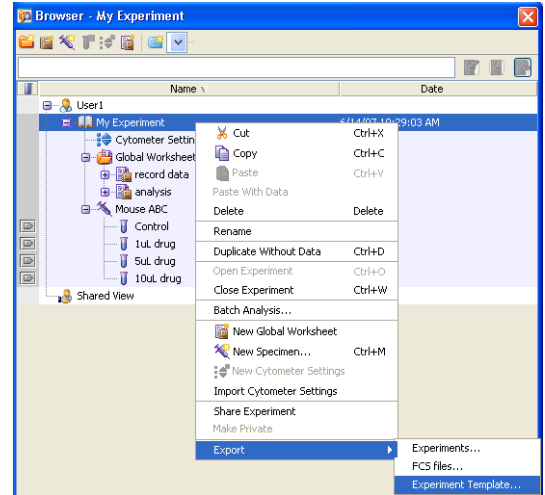
The Export Experiment Template Wizard opens.

- 2 Select the template type and type a template name.

- 3 (Optional) Select the **Lock Template** checkbox.

- 4 (Optional) Click **Next** and enter optional information in the Notes, Cytometer Operator, and Investigator tabs.

- 5 Click **Finish**.




Importing an experiment template

- 1 In the Browser, select the folder where you want the new experiment to be placed.

- 2 Select **Experiment > New Experiment**.

The Experiment Templates dialog opens.

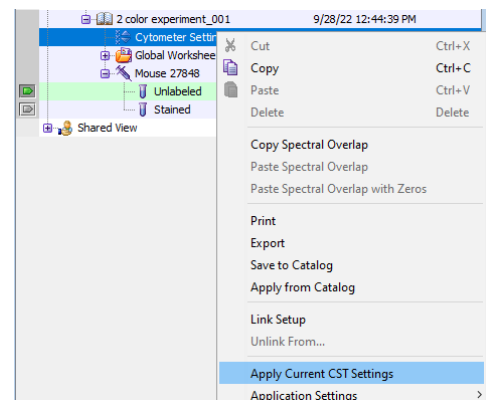
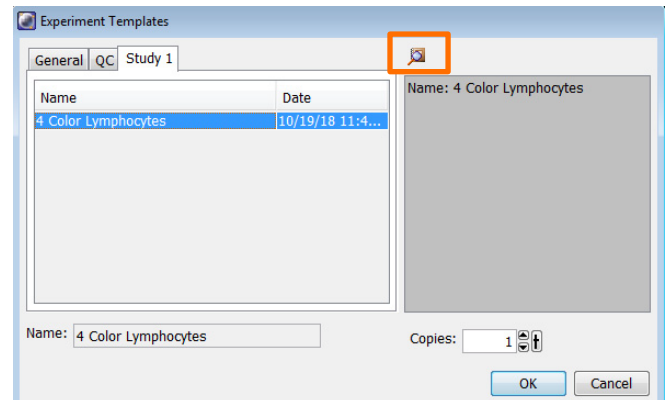
- 3 Navigate to the correct tab in the Experiment Template dialog, then select the template name.

- 4 (Optional) Click the **View the template details** button () to review the Experiment Layout associated with the template.

- 5 Specify the number of copies you need, then click **OK**.

A new experiment opens in the browser.

- 6 Prepare the imported template by applying current CS&T settings, creating compensation controls, and renaming generic element names.



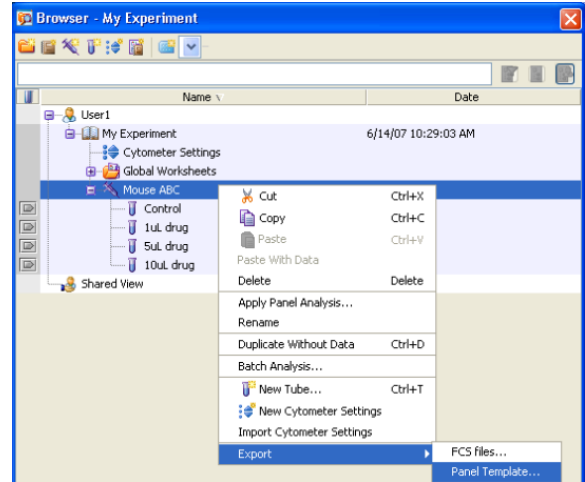
Exporting and importing a panel template

A panel template can be applied to an experiment to create specimens and tubes for acquisition and analysis, or it can be applied as a panel analysis to a specimen with data for normal worksheet analysis.

Exporting a panel template


Export a specimen as a panel template to reuse experimental elements.

- 1 In the Browser, right-click a specimen in an open experiment and select **Export > Panel Template**.
The Panel Template Wizard opens.
- 2 Select which (if any) global worksheets to be included in the template. Click **Next**.
- 3 Select or enter a template type and enter a name.
- 4 (Optional) Select the **Lock Template** checkbox.
- 5 (Optional) Click Next and enter optional information in the Comments.
- 6 Click **Finish**.

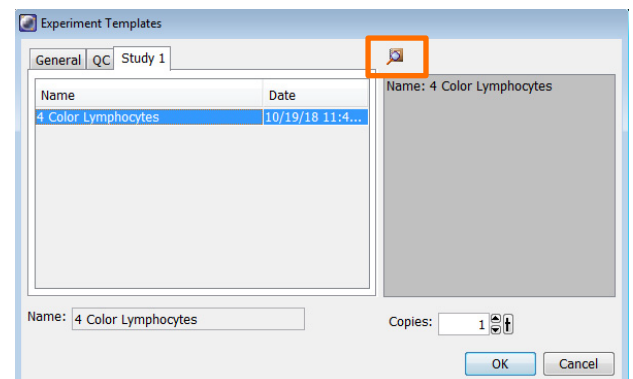
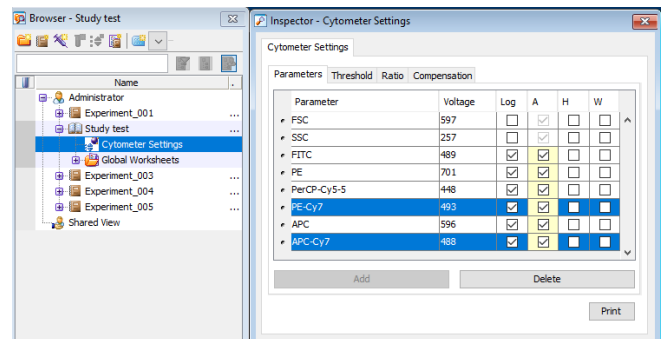


Importing a panel template

Apply a panel template to apply a specimen, tubes and other experimental elements to an experiment.


- 1 In the Browser, create a new experiment or select an open experiment.
- 2 Select the appropriate cytometer settings parameters to match your template parameters.
- 3 Select **Experiment > New Specimen**.
- 4 Navigate to the correct tab in the Specimen Template dialog, then select the template name.
- 5 (Optional) Click the **View the template details** button () to review the Experiment Layout associated with the template.
- 6 Specify the number of copies you need, then click **OK**.

A new specimen is added to the experiment.

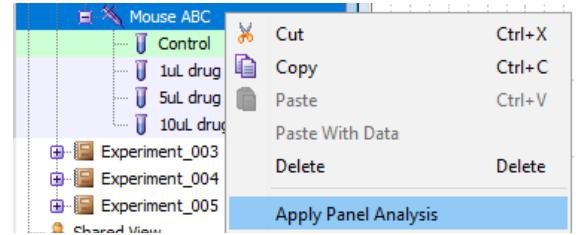


Applying a panel analysis

Apply a panel analysis to apply normal worksheets to an existing specimen and tubes.

- ① In the Browser, select an open experiment with tubes that match your template.
- ② Right-click the specimen and select **Apply Panel Analysis**.
- ③ Navigate to the correct tab in the Specimen Template dialog, then select the template name.
- ④ (Optional) Click the **View the template details** button () to review the Experiment Layout associated with the template.
- ⑤ Click **OK**.

The panel's normal worksheets are applied to the tubes, no other elements are transferred to the experiment.

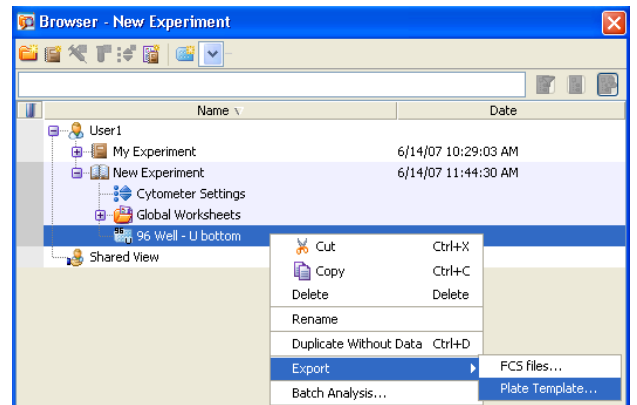


Exporting and importing a plate template

A plate template is available for the BD® High Throughput Sampler option (HTS) to save and apply plate setups for reuse.


Exporting a plate template

- ① In the Browser, right-click an open experiment and select **Export > Plate Template**.
The Plate Template Wizard opens.
- ② Select which (if any) global worksheets to be included in the template. Click **Next**.
- ③ Select or enter a template type and enter a name.
- ④ (Optional) Select the **Lock Template** checkbox.
- ⑤ (Optional) Click **Next** and enter optional information in the Comments.
- ⑥ Click **Finish**.

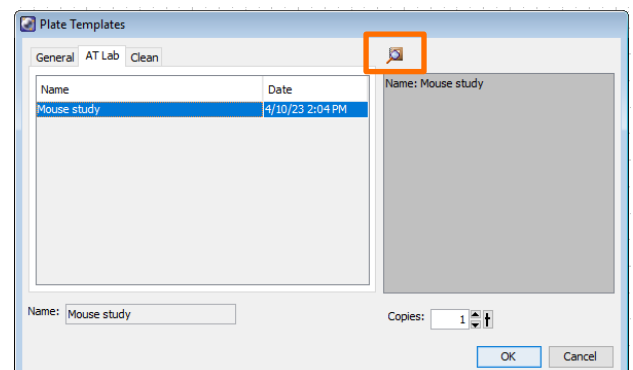


Importing a plate template

Apply a plate template to apply a plate and all associated elements to an experiment.

- ① In the Browser, create a new experiment or select an open experiment.
- ② Select the appropriate cytometer settings parameters to match your template parameters.
- ③ Select **Experiment > New Plate**.
- ④ Navigate to the correct tab in the Plate Template dialog, then select the template name.
- ⑤ (Optional) Click the **View the template details** button () to review the Experiment Layout associated with the template.
- ⑥ Specify the number of copies you need, then click **OK**.

A new plate is added to the experiment.

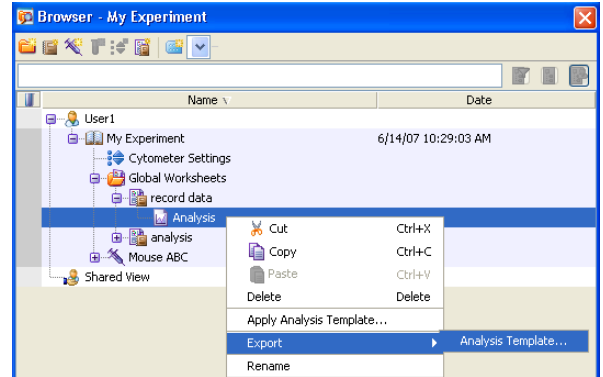


Exporting and importing an analysis template

Analysis templates are linked to the parameters in the experiment. Categorize and name the templates appropriately to avoid applying a template with the wrong plot parameters.

Exporting an analysis template

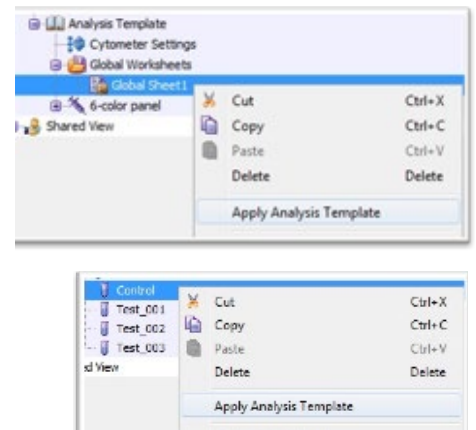
- ① In the Browser, right-click an analysis object in an open experiment and select **Export > Analysis Template**.
The Plate Template Wizard opens.
- ② Select or enter a template type and enter a name.
- ③ (Optional) Select the **Lock Template** checkbox.
- ④ (Optional) Click **Next** and enter optional information in the Comments.
- ⑤ Click **Finish**.



Importing an analysis template

Before importing an analysis template, determine if you want the analysis to be applied to a global worksheet or a tube (to create a normal worksheet)

- ① Determine if you want the template applied to a worksheet or tube:
 - To create a global worksheet, right-click a Global Sheet in the Global Worksheets folder and select **Apply Analysis Template** or select **Experiment > New Worksheet**.
 - To create a normal worksheet, right-click a tube and select **Apply Analysis Template** or by select **Experiment > New Tube**.
- ② Navigate to the correct tab in the Analysis Templates dialog, then select the template name.
- ③ Click **OK**.
Adjust, edit, add or remove any element to customize the worksheet.



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