



Getting Started with OpenSpecimen

Welcome to OpenSpecimen and thank you for contributing to improved specimen management at Flinders University!

Complete the checklist below as you work through the Onboarding folders to prepare for moving your specimens into the OpenSpecimen Production system.

To support safe learning, you'll begin in the **Test environment**, where you can practise using OpenSpecimen.

Work through the **Onboarding Toolkit** to build your skills. Once you're confident, you'll transition to the **Production system** to manage your specimens long-term.

Step-by-step user guides and demonstration videos are included to help you set up your lab, assign team access, and enter specimen data.

The OpenSpecimen Team is here to support you—reach out anytime if you need help!

Purpose

Use this checklist to prepare for moving your specimens into the Production system.

Step 1: Getting Started

☐ **OpenSpecimen at a Glance**

→ Read this overview to learn what OpenSpecimen is, who it's for, and how it benefits both researchers and Flinders University.

☐ **Glossary of Key Terms**

→ Read this glossary to get familiar with key OpenSpecimen terminology.

Step 2: Getting Prepared

☐ What Information Do I Need?

→ Use this checklist to prepare key information before setting up your lab in OpenSpecimen.

☐ Request Setup of a New Site and User Accounts

→ Step-by-step guide to request site setup and get user accounts created in the OpenSpecimen Test environment.

Step 3: Set Up Your Lab

☐ Using the AI Helpdesk Tool in OpenSpecimen

→ Set up the AI assistant to get instant answers and guidance on using any feature in OpenSpecimen.

☐ Create a Collection Protocol in OpenSpecimen

→ A Collection Protocol defines the rules and structure for collecting, storing, and managing biospecimens in a research study.

☐ Define Participant Requirements in OpenSpecimen

→ Defining the participant data and eligibility criteria required for Participant-Centric studies in a Collection Protocol.

☐ Assign User Roles in OpenSpecimen

→ Once your site and user access are configured, you can assign appropriate roles to members of your research or lab team.

☐ Enable Auto Generated Labels in OpenSpecimen

→ Auto-generated labels create standardised, unique identifiers for entities like specimens and participants, ensuring consistency, traceability, and efficient data entry.

☐ Configure Storage Containers in OpenSpecimen

→ Setup virtual Storage Containers in OpenSpecimen to represent physical or digital locations where specimens are stored.

Step 4: Entering Specimen Data into OpenSpecimen

☐ Manually Enter Specimen Data into OpenSpecimen

→ Enter specimens into the appropriate Collection Protocol.

☐ Manually Enter Participant Data into OpenSpecimen

→ Enter specimens into the appropriate Participant-Centric Collection Protocol, if applicable.

☐ Bulk Load Your Specimen Data

→ Efficiently import specimen and participant data from spreadsheets, streamlining data entry.

Step 5: Frequently Asked Questions and Tips

☐ **FAQ's**

→ Frequently asked Questions for Flinders Researchers

☐ **Tips from Other Labs**

→ These insights come from researchers across various disciplines — from clinical labs to field-based teams — who've successfully integrated OpenSpecimen into their workflows.

Step 6: Submit for Review

☐ **Notify the OpenSpecimen Team once you're confident that your test data is accurate and you're ready to transition to the live Production system.**

→ A Super User will review your Test Collection Protocol(s) and give you the thumbs up to move to Production.

Step 7: Move to Production

☐ **Submit a request to get your data migrated from Test to Production**

→ Raise a ServiceOne request to get your data moved from the Test environment to the Production environment. A Super Admin will do the bulk of the migration for you.

☐ **Get access to the Live Production environment**

→ The Project Team will provide access to the OpenSpecimen Production system, along with the other users in your research/lab team.

☐ **You can begin entering real specimen records**

→ It is go time! You can now use the skills you have learnt in the Test Environment to start entering the remainder of your own specimen data into OpenSpecimen.

☐ **Start managing and tracking specimens**

→ Access the 'Manage and Track your Specimens' folder for all the information you need to manage specimens throughout your research.

Need Help?

If you have questions or need further assistance as you work through the Onboarding kit, please post your query in the *OpenSpecimen User Group Teams chat*. A member of the OpenSpecimen Project Team will respond within 24 hours.