



## What Information Do I Need?

Setting up your lab in OpenSpecimen is a key step in getting started with the system. To make the process smooth and efficient, it's important to gather some basic information ahead of time.

Here's a simple checklist to help you prepare:

### 1. Lab Details

- ☐ **Lab Name** (e.g. Cancer Genomics Lab, Archaeology Sample Room)
- ☐ **Location(s)** – building name/room number(s)
- ☐ **Primary Contact/Site Coordinator** – person responsible for lab setup and maintenance
- ☐ **Team Members** – users who will need access (names, roles, emails)

### 2. Specimen Types and Workflows

- ☐ **Types of specimens handled** (e.g. tissue, blood, saliva, environmental samples, bones, swabs, slides)
- ☐ **Are these specimens human or non-human?**
- ☐ **What is your typical workflow?** (e.g. field collection → transport → storage → processing)
- ☐ **Are your collections project-based or general?**
- ☐ **Are your specimens related to studies and/or patients/participants?**  
(Do you run Participant Centric studies or Specimen Centric studies?)

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### 3. Storage Information

- ☐ **What storage equipment do you use?** (e.g. freezers, fridges, cabinets – type and layout)
- ☐ **Do you already have a storage map or layout?**  
If not, consider listing storage units and associated structure (e.g. shelves, compartments, etc)
- ☐ **How do you label and track specimens and what is your preference post-rollout?**  
(e.g. barcode, handwritten labels, spreadsheet, auto-generated labels)

### 4. Data Entry and Tracking

- ☐ **What data do you normally record with a specimen?** (e.g. collection date/time, volume, source, diagnosis)
- ☐ **Do you use standard forms/templates now?**
- ☐ **Do you want users to enter data directly or import from spreadsheets?**
- ☐ **Do you need audit trails?** (e.g. who edited what, and when?)
- ☐ **Consider container naming preferences** - to support consistent naming conventions across the system.

### 5. Other Considerations

- ☐ **Are there any ethics or consent requirements to capture?**
- ☐ **Any reporting or data export needs?**

### 6. Tips

- You don't need to have everything perfect — you can refine things during onboarding.
- Think about how your team works now and what would make it easier.
- Simpler is better to start with — you can always build more later.