



Assign User Roles in OpenSpecimen

This procedure is for OpenSpecimen administrators at Flinders University who are responsible for creating new User Group to access lab specimen data.

User Accounts and Roles Overview

Data access is controlled by assigning Roles to users. Each user will require at least one role. Each role is linked to a Site. Most staff and students in a research group will be allocated the 'Researcher' role. There may be other roles relevant to your research group. If a user works across two different laboratories/research groups, then a role will need to be added for each Site.

Below is a summary of the key roles commonly used within the system.

- **Administrator:** can perform all operations within the assigned Sites and has access to all Collection Protocols for the Site.
- **Principal Investigator:** has read only access to all data within the assigned protocols and can see personal health information data. Can also create and update Queries.
- **Researcher:** has read only access to Collection Protocols and can create and update Participants and Visits, can see personal health information data within the assigned protocol, and can create, edit, update and delete specimens.

Once you've received confirmation that your site is live and user roles are active, you can begin assigning the appropriate roles to members of your research/lab group.

How to Assign Roles to members of your Research/Lab Team

1. From the LHS Home Menu, navigate to **Users**.



Settings

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2. Locate the User by **scrolling the alphabetical list** or using the **Search function** at the top of the page. Once located, click on the User **Name**.
3. Click on the **Roles** tab.
4. Click **Add Role**.

The screenshot shows the 'Open Specimen' application interface. At the top, there is a navigation bar with tabs: 'Overview', 'Roles', 'Forms', and 'Profile Forms'. The 'Roles' tab is selected and highlighted with a red circle. Below the navigation bar, there is a 'Roles' section with a '+ Add Role' button, also circled in red. A modal dialog box titled 'Add Role' is open, featuring three dropdown menus labeled 'Site *', 'Collection Protocol *', and 'Role *'. At the bottom right of the dialog, there are 'Cancel' and 'Add' buttons.

5. From the drop-down menus, make the following selections:
 - **Site:** Choose the relevant site where specimen collection will be stored.
 - **Collection Protocol:** Select the appropriate protocol, if it has already been created.
 - **Role:** Select the role that best aligns with the level of access the User requires.

6. Click .

Repeat these steps for each User in your Research/Lab Group.

Site *	<input type="text"/>
Collection Protocol *	<input type="text"/>
Role *	<input type="text"/>

Need Help?

Try the OpenSpecimen AI Help Tool to get quick answers, step-by-step guidance, and help navigating features like Collection Protocols.

Refer to the 'Using the AI Helpdesk Tool In OpenSpecimen User Guide' for instructions on how to set up the OpenSpecimen Helpdesk Tool.

If you have questions or need further assistance as you work through the Onboarding kit, please post your query as a chat in the *OpenSpecimen Onboarding Team* page.

A member of the OpenSpecimen Project Team will respond within 24 hours.