



Enable Auto Generated Labels in OpenSpecimen

In OpenSpecimen, auto-generated labels create standardised, unique identifiers for entities like specimens, participants, visits, and containers. These labels improve consistency, prevent duplication, and enhance traceability by incorporating key details such as Protocol ID and Specimen Type—while also streamlining data entry by removing the need for manual labelling.

If you prefer to continue using your manual labelling process, that's perfectly fine. However, if you'd like to explore auto-labelling within OpenSpecimen, start by watching the '3.5(b) Enable Auto Generated Labels in OpenSpecimen' video.

Ready to try it in the Test environment? Follow the steps below.

Prefer a walkthrough with a system Super User first? Post your request in the OpenSpecimen User Group Teams chat, and a Project Team member will respond within 24 hours to help arrange this.

How to Enable Auto Generated Labels

Step 1: Navigate to Collection Protocol

From the LHS Home Menu, navigate to **Collection Protocols** and ***select the specific CP*** you want to enable the labels for.

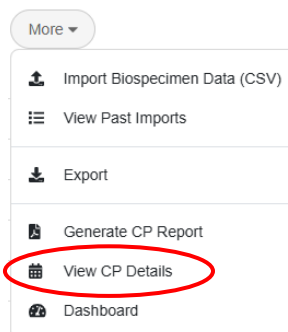


Home
Carts
Catalogs
Collection Protocols
Consents
Containers

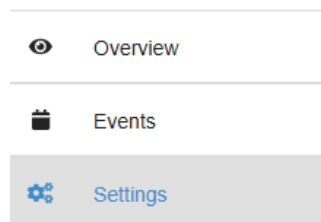
Step 2: Access Label Format and Print Settings

Click on **More**.

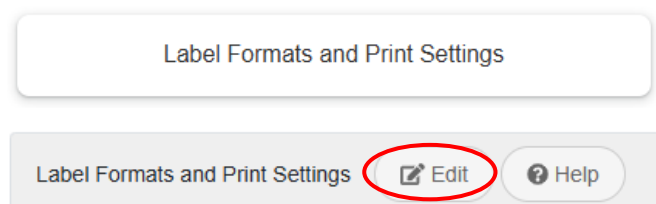
Click **View CP Details**.



Select the **Settings** tab from the LHS menu.



Select **Label Format and Print Settings** and click on **Edit**.



Step 3: Edit Miscellaneous Settings

Under the '**MISCELLANEOUS SETTINGS**' section, add or modify the **Additional Label Format** as needed.

MISCELLANEOUS SETTINGS

Close Parent Specimens

☐ Yes ☒ No

Zero Out Specimen Quantity


☐ Yes ☐ No ☒ Use System Setting

Additional Label Format


Specimen Barcoding

☐ Enabled ☒ Disabled

Barcode Format

 **Note:** The **Close Parent Specimens** option results in the parent specimen being inactivated once an aliquot or derivative is created from it.

Step 4: Configure Label Tokens

 **Note:** When deciding on how to setup your labels, visit the *OpenSpecimen Wiki* page for a list of tokens. These tokens are predefined markers that can be replaced with actual data when generating labels.

For Specimen labels visit:

<https://openspecimen.atlassian.net/wiki/spaces/CAT/pages/268632071/Specimen+Label+Format>

For Participant labels visit:


<https://openspecimen.atlassian.net/wiki/spaces/CAT/pages/268435457/Participant+Label+Format+PPID+Format>

Define print tokens using rules that specify criteria for different specimen types or lineage. Use the appropriate syntax to include tokens like %PSPEC_LABEL% and %PSPEC_UID% for generating labels.

System Administrators can set conditional rules based on specimen characteristics (e.g., type, status) to customize the labels.

Step 5: Define Printing Strategy

Specify when the labels should be printed (e.g., on registration, collection, etc.) by selecting options in the print settings.

 **Note:** The University currently does not support integrated printer software (e.g., BarTender). To print labels, users must first export the data to a CSV file and then use Brady software or a similar application to complete the printing process.

Step 6: Confirm and Save Changes

Ensure all settings are appropriately configured and **save** your changes to enable the label generation.

Tips

- Review any relevant documentation regarding specific tokens and configurations to ensure that your labels meet your needs.
- Consider testing the label generation after configuration to verify everything is functioning as expected.

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.