



Manually Enter Specimen Data into OpenSpecimen

This guide helps Flinders University researchers, including those in clinical trials, field studies, pathology, and hospital labs, upload specimen and participant data into OpenSpecimen using bulk import tools. Whether you're based at Bedford Park, Tonsley, or collaborating with SA Health, the process streamlines data entry, ensures consistency, and is ideal for teams managing data in spreadsheets.

Learn how to export records, prepare your spreadsheet, and import specimens or containers, with steps tailored to Flinders' OpenSpecimen setup and tips for validation and troubleshooting.

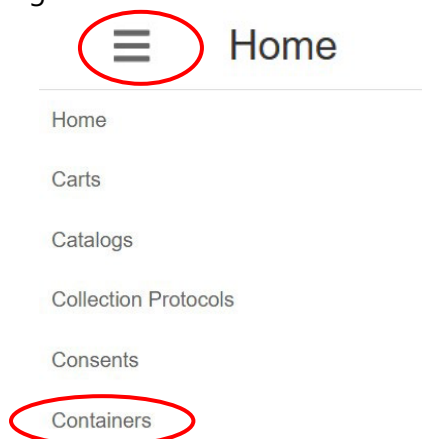
How to Perform a Bulk Export for a Container(s)

We recommend you watch the '**Bulk Load Your Data into OpenSpecimen**' video tutorial in the Onboarding Kit, so you can watch this process before you attempt to complete it.

Step 1: Perform the Bulk Export (Container)

1. Access the Containers List View

- From the Home Menu, navigate to **Containers**.



2. Locate the Container to Export

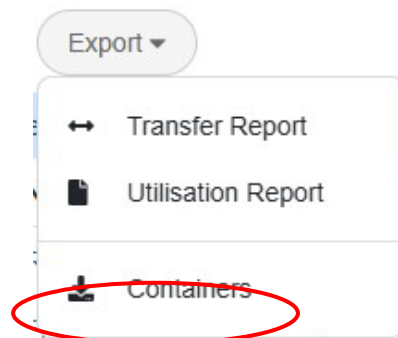
- Use the **Search function** at the top of the page to locate the desired Container (e.g., FMCCryodewar #5).

3. Select the Container

- **Tick the checkbox** next to the container name that you wish to export. You can select multiple containers if needed.

4. Export the Container Structure

- Click **Export**.
- Select **Containers** from the drop-down menu.



- Wait for the system to generate and download the CSV file.

5. Review the Exported File

- Open the CSV file to verify the hierarchy and structure (Tank → Tower → Boxes).
- Check container names, parent-child relationships, and dimensions.
- Use this file as a template for modifying or creating new containers.

A	B	C	D	E	F	G	H	I
Identifier	Display Name	Name	Barcode	Used For	Type Name	Activity Status	Site Name	Storage Location

Note:

- Keep a copy of the exported CSV for reference or editing.
- Always use a validated export as your template for similar setups.
- The 'Identifier' field is auto generated by the system. For **existing containers**, leave Identifier field as is. When entering **new containers**, leave this field blank.

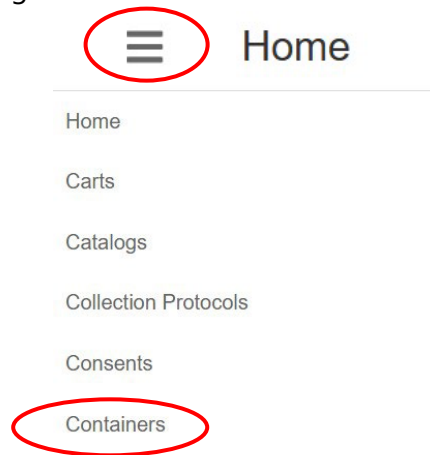
Step 2: Perform the Bulk Import (Container)

6. Prepare Your CSV

- Use exact, case-sensitive names for Parent Containers.
- Verify correct Container Types (e.g., Tank, Tower, Box_9x9).
- Ensure dimensions (rows/columns) are accurate and consistent.
- Save the file in .CSV format.

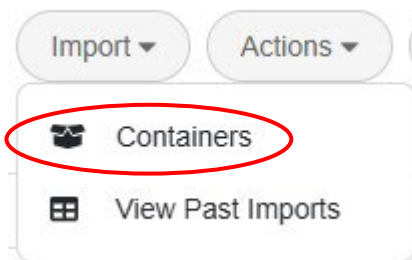
7. Navigate to Containers

- From the Home Menu, navigate to Containers.



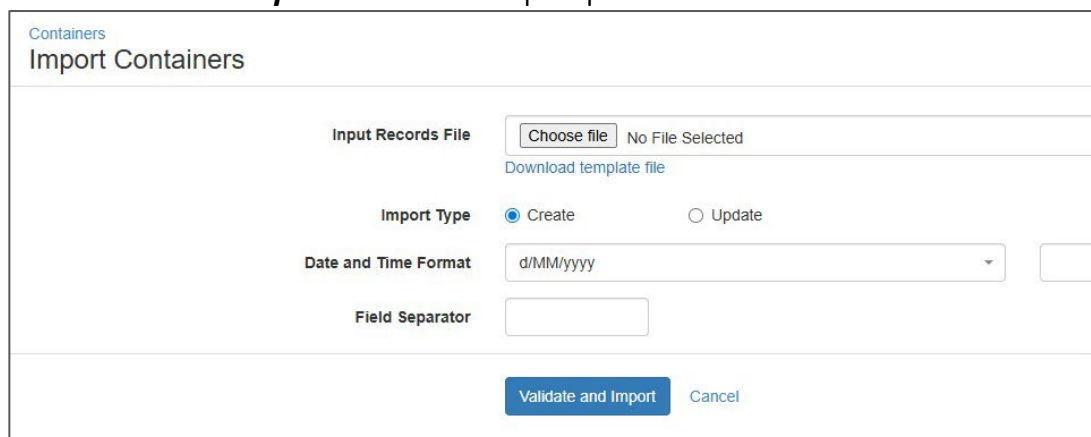
8. Start the Import

- Click the **Import** button from the Containers page.
- Select **Containers** from the list of import types.



9. Upload Your File

- Click **Choose File** and **select your CSV**.
- If creating new containers, select **Create** as the **Import Type**, otherwise select **Update** if you are only modifying containers.
- Click **Validate and Import** to start the import process.

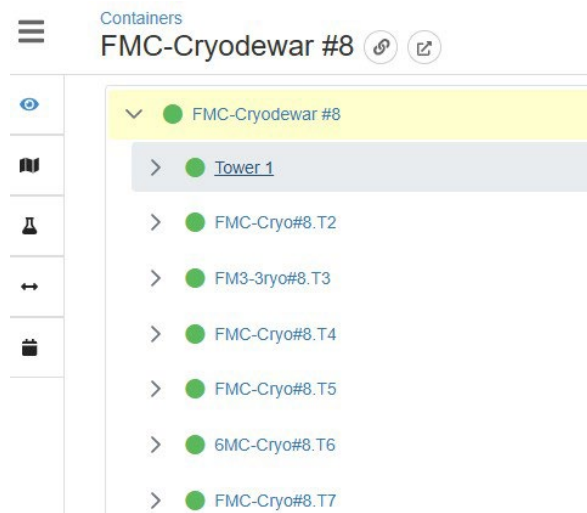
A screenshot of a web application's "Import Containers" form. The form has a title "Containers" and "Import Containers". It contains several fields: "Input Records File" with a "Choose file" button and "No File Selected" text; "Import Type" with radio buttons for "Create" (selected) and "Update"; "Date and Time Format" with a dropdown menu showing "d/MM/yyyy"; and "Field Separator" with an empty text input field. At the bottom, there are two buttons: "Validate and Import" and "Cancel".

10. Review Import Results

- Review the import log for errors or warnings which can be used to troubleshoot.
- Once your job has completed, confirm all intended rows were successfully uploaded by looking at the **Success Vs Failed** stats on the Bulk Import Jobs JOB ID Page.

11. Validate in OpenSpecimen

- Search for your new container (e.g., FMC-Cryodewar #8).
- Verify the hierarchy: tank → towers → boxes.
- Check container names, types, and dimensions.



Note:

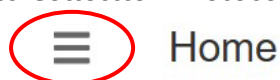
- Start with a test batch to verify formatting.
- Ensure new container types are pre-defined if needed.
- Keep a backup of the CSV file for reference or re-import.

How to Perform a Bulk Export for Specimens, Collection Protocol or Participant Data

We recommend you watch the '**Bulk Load Your Data into OpenSpecimen**' video tutorial in the Onboarding Kit, so you can watch this process before you attempt to complete it.

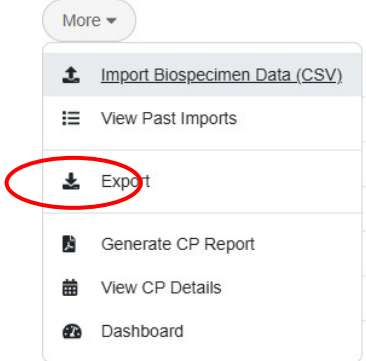
Step 1: Perform a Bulk Export (Specimen/Collection Protocol/Participant Data)

- From the Home Menu, navigate to **Collection Protocols**.

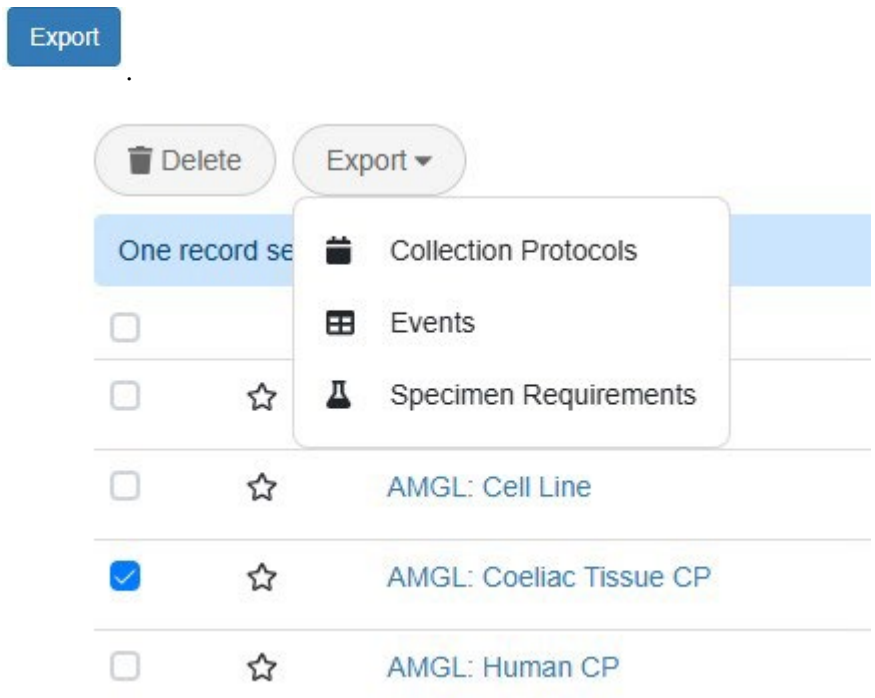


- Home
- Carts
- Catalogs
- Collection Protocols**
- Consents
- Containers

- Click on the **Collection Protocol** that matches your research project or ethics-approved study.
- From either the Participant view or Specimen view:
 - Click on **More** and then **Export**



- Select the Record type you wish to export from the drop-down list (e.g. Participants, Specimens) and click Export



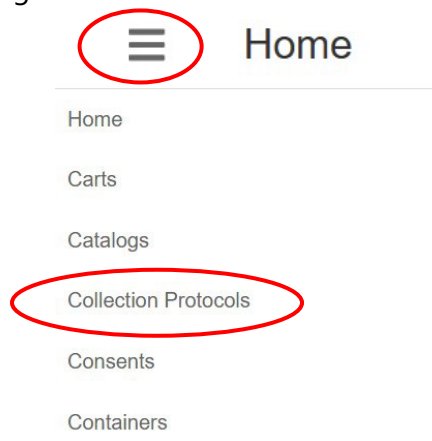
- Wait for the CSV to download.
- Open the CSV file to view the exported records.
- New rows/records can be entered or existing records modified in the downloaded spreadsheet.

Note:

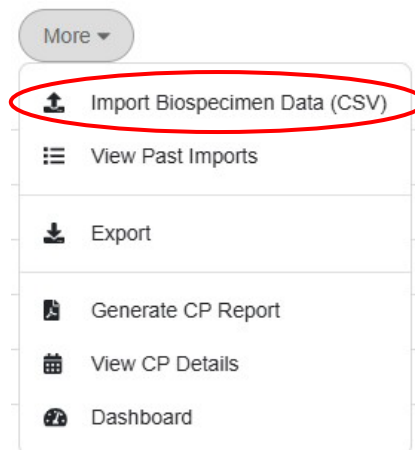
- Starting from an export helps identify the required fields and formatting.
- Use dropdown values where applicable (e.g. Blood for specimen type).
- Format dates as DD-MM-YYYY

Step 2: Perform a Bulk Import (Specimen/Collection Protocol/Participant Data)

- From the Home Menu, navigate to **Collection Protocols**.



- Click on the **Collection Protocol** that matches your research project or ethics-approved study.
- Click on **More**.
- Select **Import Biospecimen Data (CSV)**.



- Under the **Select Records Type** dropdown menu, select the relevant record type.
- Click **Choose File** and **select your CSV**.

- Select the Import Type. **Create** will only create new records, **Update** will not create any new records and only update those that exist, while **Update Else Create** will both create any new records and update existing ones.
- Click on **Validate and Import** to start the import process.

The screenshot shows a web form for bulk import. The 'Select Records Type' dropdown is set to 'Participants'. The 'Input Records File' section has a 'Choose file' button and 'No File Selected' text. The 'Import Type' section has three radio buttons: 'Create' (selected), 'Update', and 'Update Else Create' (circled in red). The 'Date and Time Format' is set to 'd/MM/yyyy'. The 'Field Separator' is empty. At the bottom, the 'Validate and Import' button is circled in red, along with a 'Cancel' link.

- Review the import log for errors or warnings which can be used to troubleshoot.
- Once your job has completed, confirm all intended rows were successfully uploaded by looking at the **Success Vs Failed** stats on the Bulk Import Jobs JOB ID Page.

Success	Failed
18	0

- Return to the Collection Protocol and search for the newly entered/modified records to make sure they look correct.

Note:

- Start with a test batch to verify formatting.
- Ensure new container types are pre-defined if needed.
- Keep a backup of the CSV file for reference or re-import.