



RETAIN Biological User Guide

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1. RETAIN system for recording biological substances

The RETAIN database contains pathogens and toxins listed in the Approved List of Biological Agents, Specified Animal Pathogen Order and Schedule 5 of the ATCSA.

The database also includes biological substances that Schools have requested to be added. These additional substances are not on Approved Lists and include viral vectors and biological agents classified into Group 1, 2, 3 or other Groups by Schools. Biological substances which require a licence, including plant pathogens and pests, should also be registered in RETAIN. If a substance is not currently listed please contact biosafety@ed.ac.uk.

For more information on what biological materials should and shouldn't be registered in RETAIN please see [pathogen and toxin registration](#). Please check this guidance and contact your School Biological Safety Adviser for information and advice and if you have any questions or are not sure about what is required before acquiring any materials.

The officially designated names of pathogens and toxins found in the regulatory guidance is used in RETAIN but you should be aware that occasionally the scientific names may be different in current microbial taxonomy.

Each pathogen or toxin must be separately registered in RETAIN. Different strains of the same pathogen should be recorded on the same entry unless they belong to a different hazard group.

Substances that are removed from the database become archived so that a record is maintained. Please update your records on RETAIN when you have finished working with your registered material and it has been safely disposed of, when you leave the university and take your materials with you, or if you leave the university and leave your materials under another Principle Investigator's responsibility.

2. Logging in to the RETAIN database

To use RETAIN you must first be registered and assigned a User role, which determines your level of access to the system. The RETAIN User roles are Administrator, Biological Co-ordinator, Biological Principle Investigator and Biological Researcher.

- Administrators are members of the University Health and Safety Department.
- Biological Co-ordinators are selected by each School as staff which have certain oversight responsibilities for biological materials, normally Biological Safety Officers, their deputies and GM Biological Safety Officers. Those assigned this role are registered in RETAIN by the University Health and Safety Department (contact Health.Safety@ed.ac.uk).



- Principle Investigators are registered in RETAIN by Biological Co-ordinators in their School(s).
- Biological Researchers are registered in RETAIN by the Principle Investigator leading their research group or Biological Co-ordinators in their School.

Once registered, Users should login to RETAIN using their EASE username and password (<https://www.ease.ed.ac.uk/services/>).

3. Problems logging in to and using RETAIN

Contact your local Biological Co-ordinator who will register you in RETAIN and provide training. Step-by-step User guides for each of the roles are also provided in this document.

4. Biological Co-ordinator User guide

Those assigned this role have certain oversight responsibilities for biological materials such as Biological Safety Officers, their deputies and GM Biological Safety Officers and therefore they can view all the substances and projects recorded for their School.

Those assigned a Biological Co-ordinator role are able to:

- Register Principle Investigators and Biological Researchers in their School(s);
- Record substances belonging to Principle Investigator(s) in their School(s);
- Record projects led by Principle Investigator(s) in their Schools(s)
- Assign a Biological Researcher(s) to a Principle Investigator;
- Link substances to a project;
- Maintain rooms used for biological work.

4.1. Adding or editing Users

To register a Principle Investigator or Biological Researcher in RETAIN:

1. Click on the Admin tab.
2. Click on the Maintain Users tab.
3. In the Maintain Users page search for a User with their UUN if new to the system and/or via School list if already in the system.
4. In the Add New User (or Edit User) page assign a role (Biological Principle Investigator or Biological Researcher) to the User and assign School(s) as appropriate.

It is advised that staff have their access removed by making them inactive if they no longer require it to ensure the security of the system.

4.2 Assigning a Biological Researcher to a Principle Investigator

1. Click on the Admin tab.



2. Click on the Maintain Users tab.
3. In the Maintain Users page enter the UUN of the Principle Investigator to whom the Biological Researcher is to be assigned.
4. In the Edit User Details page, scroll down to the Assigned Biological Researchers section, select the Biological Researcher from the drop down list and Assign User.

4.3 Adding a substance

1. Click on the Biological tab.
2. Click on Add Substance from the menu on the left of the screen.
3. On the New Biological Substance page, type the first few letters of the scientific name of the substance that you wish to add and click on the correct substance on the list that appears.
4. Select whether this substance is or will be genetically modified and then click Next.
5. On the next New Biological Substance page enter details of the substance. The following information is mandatory: i) local reference name or number for the substance ii) GM name, if applicable iii) number of vials iv) building where the substance is stored v) Principle Investigator responsible for the substance and vi) GM/Bio Safety Committee.
6. For Schedule 5 substances, room number and fridge or freezer number are also mandatory.

4.4 Requesting the addition of a new substance to RETAIN

1. Substances listed in the RETAIN database are pathogens and toxins listed in the Approved List of Biological Agents, Specified Animal Pathogen Order and Schedule 5 of the ATCSA as well as substances that Schools have requested to be listed.
2. Only an Administrator can add a new substance to the list in the RETAIN database. Please contact biosafety@ed.ac.uk to request that a new substance is added.

4.5 Finding or editing a substance

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of substance iv) Principle Investigator responsible for the substance or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Edit Substance for the substance to be edited.
5. On the Edit Biological Substance page, edit the substance details and save the changes.



4.6 Removing a substance that is no longer stored or used

Substances that are no longer used or stored are archived in RETAIN, rather than deleted from the database. If a substance has been linked to a project it must be removed from the project before the substance can be archived.

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of the substance iv) Principle Investigator responsible for the substance or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Archive Substance for the substance to be archived.
5. On the Archive Biological Substance page, a disposal method must be entered and additional disposal detail must be provided for Schedule 5 materials.

4.7 Adding a GM project

1. In the Biological tab, click Add GM Project from the menu on the left of the screen.
2. On the Add GM Project page enter the project information. The following information is mandatory: i) project title ii) project class (if there is no project class select Not Required iii) Principle Investigator iv) GM/Bio Safety Committee v) project approval or start date.

4.8 Adding a BA project

1. In the Biological tab, click Add BA Project from the menu on the left of the screen.
2. On the Add BA Project page enter the project information. The following information is mandatory: i) project title ii) Principle Investigator iii) GM/Bio Safety Committee iv) project approval or start date.

4.9 Finding or editing a project

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) project title ii) School reference number iii) GM class iv) containment level for the work v) HSE reference number vi) licence reference number vii) Principle Investigator viii) GM/Bio Safety Committee or ix) project type.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Edit Project page, edit project details and save changes.



4.10 Linking a substance to a project

A substance must first be assigned to an owner i.e. Principle Investigator (described in section 4.3) before it can be linked to a project.

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) project title ii) School reference number iii) GM class iv) containment level for the work v) HSE reference number vi) licence reference number vii) Principle Investigator viii) GM/Bio Safety Committee or ix) project type.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Project page select Link a Substance which takes you to Find Substance.
6. On the Find Substance page search for the substance using one or more of the fields.
7. On the Find Substance results page select Link to Project for the substance to be linked to that Project.
8. To link another substance to that Project, select Link a Substance and then repeat the above.

4.11 Adding a User to a project

First check that the User you want to link to a project has access to RETAIN by searching for them using their UUN (described in section 4.1).

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) project title ii) School reference number iii) GM class iv) containment level for the work v) HSE reference number vi) licence reference number vii) Principle Investigator viii) GM/Bio Safety Committee or ix) project type
4. On the Find Project page, in the table listing the search results select Edit Project for the project for which a User is to be added.
5. On the Project page scroll down to Permissions and select Add User.
6. Choose permitted User from the drop down list and click Add User.

5. Principle Investigator User guide

Principle Investigators are registered in RETAIN by Biological Co-ordinators (e.g. Biological Safety Officers, their deputies and GM Biological Safety Officers) in their School.

Principle Investigators 'own' biological substances and must ensure that the correct permissions are in place prior to obtaining any hazardous biological materials. Those assigned the role of Biological Principle Investigator can only view or edit substances that have been assigned to them and not substances owned by another Principle Investigator. Principle Investigators can be



assisted by a Biological Researcher in their team to add substances and projects to RETAIN. However, this Biological Researcher must first be registered in RETAIN and assigned to the Principle Investigator leading the research group.

Those assigned a Biological Principle Investigator role are able to:

- Record substances which they own;
- Record projects;
- Link substances to a project(s);
- Register Biological Researchers in their team in RETAIN to assist with record maintenance.

5.1 Registering a Biological Researcher

1. Click on the Admin tab.
2. Click on the Maintain Users tab.
3. In the Maintain Users page search for the name of the Biological Researcher with their UUN if new to the system or via School list if already in the system.
4. In the Add New User (or Edit User) page assign the Biological Researcher role to the User.

5.2 Assigning a Biological Researcher to a Principle Investigator

1. Click on the Admin tab.
2. Click on the Maintain Users tab.
3. In the Maintain Users page enter your UUN i.e. the UUN of the Principle Investigator to whom the Biological Researcher will be assigned.
4. In the Edit User Details page, scroll down to Assigned Biological Researchers, select the Biological Researcher from the drop down list and Assign User.

It is advised that staff have their access removed by making them inactive if they no longer require it to ensure the security of the system.

5.3 Adding a substance

1. Click on the Biological tab.
2. Click on Add Substance from the menu on the left of the screen.
3. On the New Biological Substance page, type the first few letters of the scientific name of the substance that you wish to add and click on the correct substance on the list that appears.
4. Select whether this substance is or will be genetically modified and then click Next.
5. On the next New Biological Substance page enter details of the substance that you own. The following information is mandatory: i) local reference name or number for the substance ii) GM name, if applicable iii) number of



- vials iv) building where the substance is stored and v) GM/Bio Safety Committee. The name of the Principle Investigator is shown automatically.
6. For Schedule 5 substances, room number and fridge or freezer number are also mandatory.

5.4 Requesting the addition of a new substance to RETAIN

1. Substances listed in the RETAIN database are pathogens and toxins listed in the Approved List of Biological Agents, Specified Animal Pathogen Order and Schedule 5 of the ATCSA as well as substances that Schools have requested to be listed in the system.
2. Only an Administrator can add a new substance to the list in the RETAIN database. Please contact biosafety@ed.ac.uk to request that a substance is added.

5.5 Finding or editing a substance

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of substance iv) Principle Investigator or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Edit Substance for the substance to be edited.
5. On the Edit Biological Substance page, edit substance details and save changes.

5.6 Removing a substance that is no longer stored or used

Substances that are no longer used or stored are archived in RETAIN, rather than deleted from the database. If a substance has been linked to a project it must be removed from the project before the substance can be archived.

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of substance iv) Principle Investigator or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Archive Substance for the substance to be archived.
5. On the Archive Biological Substance page, a disposal method must be entered and additional disposal detail must be provided for Schedule 5 materials.



5.7 Adding a GM project

1. In the Biological tab, click Add GM Project from the menu on the left of the screen.
2. On the Add GM Project page enter the project information. The following information is mandatory: i) project title ii) project class (if there is no project class to be assigned select Not Required iii) GM/Bio Safety Committee and iv) project approval or start date. The name of the Principle Investigator is shown automatically.

5.8 Adding a BA project

1. In the Biological tab, click Add BA Project from the menu on the left of the screen.
2. On the Add BA Project page enter the project information. The following information is mandatory: i) project title ii) GM/Bio Safety Committee and iii) project approval or start date. The name of the Principle Investigator is shown automatically.

5.9 Finding or editing a project

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) Principle Investigator ii) project title iii) School reference number iv) GM class v) containment level for the work vi) HSE reference number vii) licence reference number or viii) GM/Bio Safety Committee.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Edit Project page, edit project details and save changes.

5.10 Linking a substance to a project

A substance must first be assigned to an owner i.e. Principle Investigator (described in section 5.3) before it can be linked to a project.

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) Principle Investigator ii) project title iii) School reference number iv) GM class v) containment level for the work vi) HSE reference number vii) licence reference number or viii) GM/Bio Safety Committee.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Project page select Link a Substance which takes you to Find Substance.
6. On the Find Substance page search for substance using one or more of the fields.



7. On the Find Substance results page select Link to Project for the substance to be linked to that project.
8. To link another substance to that Project, select Link a substance and repeat the above.

5.11 Adding a User to a project

First check that the User you want to link to a project has been registered in RETAIN by searching for them using their UUN (described in section 5.1).

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) Principle Investigator ii) project title iii) School reference number iv) GM class v) containment level for the work vi) HSE reference number vii) licence reference number or viii) GM/Bio Safety Committee.
4. On the Find Project page, in the table listing the search results select Edit Project for the project for which a User is to be added.
5. On the Project page select Add User.
6. Choose permitted User from the drop down list and click Add User.

6. Biological Researcher User guide

Biological Researchers are registered in RETAIN by Biological Co-ordinators (e.g. Biological Safety Officers, their deputies and GM Biological Safety Officers) in their School or their Principle Investigator. Next, the Biological Researcher must be assigned to their Principle Investigator in RETAIN before being able to carry out any functions. If you have not been assigned to a Principle Investigator an error message will appear when trying to add substances, projects etc. If this happens please contact your Principle Investigator or Biological Co-ordinator.

Biological Researchers can only view/add/edit substances that have been assigned to their Principle Investigator and not substances owned by another Principle Investigator. A Biological Researcher is able to:

- Record substances belonging to their Principle Investigator;
- Record projects led by their Principle Investigator;
- Link substances to a project(s).

6.1 Adding a substance

1. Click on the Biological tab.
2. Click on Add Substance from the menu on the left of the screen.
3. On the New Biological Substance page, type the first few letters of the scientific name of the substance that you wish to add and click on the correct substance on the list that appears.
4. Select whether this substance is or will be genetically modified and then click Next.



5. On the next New Biological Substance page enter details of the substance. The following information is mandatory: i) local reference name or number for the substance ii) GM name, if applicable iii) number of vials iv) building where the substance is stored v) Principle Investigator and vi) GM/Bio Safety Committee.
6. For Schedule 5 substances, room number and fridge or freezer number are also mandatory.

6.2 Requesting the addition of a new substance to RETAIN

1. Substances listed in the RETAIN database are pathogens and toxins listed in the Approved List of Biological Agents, Specified Animal Pathogen Order and Schedule 5 of the ATCSA as well as substances that Schools have requested to be listed in the system.
2. Only an Administrator can add a new substance to the list in the RETAIN database. Please contact biosafety@ed.ac.uk to request that a substance is added.

6.3 Finding or editing a substance

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of the substance iv) Principle Investigator or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Edit Substance for the substance to be edited.
5. On the Edit Biological Substance page, edit substance details and save changes.

6.4 Removing a substance that is no longer stored or used

Substances that are no longer used or stored are archived rather than deleted from the database. If a substance has been linked to a project it must be removed from the project before the substance can be archived.

1. Click on the Biological tab.
2. Click on Find Substance from the menu on the left of the screen.
3. Search for a substance by using one or more of the following fields: i) local reference name or number for the substance ii) GM name, if applicable iii) scientific name of the substance iv) Principle Investigator or v) GM/Bio Safety Committee.
4. On the Find Substance page, in the table listing the search results select Archive Substance for the substance to be archived.
5. On the Archive Biological Substance page, a disposal method must be entered and additional disposal detail must be provided for Schedule 5 materials.



6.5 Adding a GM project

1. In the Biological tab, click Add GM Project from the menu on the left of the screen
2. On the Add GM Project page enter the project information. The following information is mandatory: i) project title ii) project class (if there is no project class to be assigned select Not Required) iii) Principle Investigator iv) GM/Bio Safety Committee and v) project approval or start date.

6.6 Adding a BA project

1. In the Biological tab, click Add BA Project from the menu on the left of the screen.
2. On the Add BA Project page enter the project information. The following information is mandatory: i) project title ii) Principle Investigator iii) GM/Bio Safety Committee and iv) project approval or start date.

6.7 Finding or editing a project

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) project title ii) School reference number iii) GM class, if applicable iv) containment level for the work v) HSE reference number vi) licence reference number vii) Principle Investigator or viii) GM/Bio Safety Committee.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Edit Project page, edit project details and save changes.

6.8 Linking a substance to a project

A substance must first be assigned to an owner i.e. Biological Principle Investigator before it can be linked to a project (described in section 6.1).

1. Click on the Biological tab.
2. Click on Find Project from the menu on the left of the screen.
3. Search for a project by using one or more of the following fields: i) project title ii) School reference number iii) GM class, if applicable iv) containment level for the work v) HSE reference number vi) licence reference number vii) Principle Investigator or viii) GM/Bio Safety Committee.
4. On the Find Project page, in the table listing the search results select Edit Project for the project to be edited.
5. On the Project page select Link a Substance which takes you to Find Substance.
6. On the Find Substance page search for substance using one or more of the fields.
7. On the next Find Substance page select Link to Project.



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