



## 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](mailto: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. Log 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](mailto:Health.Safety@ed.ac.uk)).
- Principle Investigators are registered in RETAIN by Biological Co-ordinators in their School.
- 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 ([www.ease.ed.ac.uk/services/](http://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) in RETAIN
- Record substances (Pathogens or Toxins) belonging to Principle Investigator(s) in their School(s)
- View any new substances that have been recorded in RETAIN by Users in the past 7 days (Homepage)
- Record projects (BA or GM) led by Principle Investigators in their Schools(s)
- Assign a Biological Researcher to a Principle Investigator
- Link substances (Pathogens or Toxins) to a project
- View the storage location of substances in their School

#### 4.1 Add or edit Users

Add a Principle Investigator or Biological Researcher:

- Click on the 'Admin' tab
- Click on the 'Manage Users' tab
- Select 'Add User' and search for a user with their UUN if new to the system and save
- On the 'View 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 Assign a Biological Researcher to a Principle Investigator

- Click on the 'Admin tab'
- Click on the 'Manage Users' tab



- Enter the UUN or name of the Principle Investigator to whom the Biological Researcher is to be assigned and click filter
- Click on the UUN of the Principle Investigator
- On the 'View User' page scroll down to 'Assigned Biological Researchers' and select the researcher to be assigned to this Principle Investigator

#### 4.3 Add a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Click on 'Add Substance'
- To add a new biological substance, type the first few letters of the name of that substance that you wish to add in the 'Biological Agent' box and click on the correct substance from the list
- Select whether the substance is genetically modified or not and click continue
- On the 'New Biological Substance' page enter details of the substance. Information that is mandatory is: i) School reference ii) GM name if applicable iii) number of vials iv) Building name v) Principle Investigator responsible for the substance vi) GM/Bio Safety committee.
- For Schedule 5 substances, Room number and Fridge/Freezer are also mandatory fields.

#### 4.4 Request the addition of a new substance to RETAIN

- 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.
- Only an Administrator can add a new substance to the list in the [RETAIN](#) database. Please contact [biosafety@ed.ac.uk](mailto:biosafety@ed.ac.uk) to request that a new substance is added.

#### 4.5 Find or edit a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) Principle Investigator responsible for the substance iv) GM name if applicable v) 'active' or 'inactive' substance (cannot edit an archived substance but details of the original record can be viewed) vi) date range that a substance(s) was recorded in RETAIN and then click on filter.
- Click on the substance name to view the information that has been recorded in RETAIN for that substance.
- To edit a substance record, on the 'View Substance' page select 'Edit', change the required field(s) and save any changes.



#### 4.6 Archive 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 unlinked from the project before the substance is archived.

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) 'active' substances only iv) Principle Investigator responsible for the substance v) GM name, if applicable vi) date range that a substance(s) has been recorded in RETAIN and then click on filter.
- Click on the substance name to view the information that has been recorded in RETAIN for that substance
- To archive a substance, on the 'View Substance' page select 'Archive' and select the disposal route for the substance and save. Additional disposal detail must be provided for Schedule 5 materials.

#### 4.7 Add a GM project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'GM' and enter the relevant GM project information in the listed fields
- Information that is mandatory is i) Project title ii) Class (if there is no Class please select 'Not Required') iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project.

#### 4.8 Add a BA project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'BA' and enter the relevant BA project information in the listed fields
- Information that is mandatory is i) Project title ii) Containment level iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project.

#### 4.9 Find or edit a project

- Click on the 'Biological tab'
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' or 'inactive' project (cannot edit an archived



project but details of the original record can be viewed) iv) Principle Investigator v) GM/Bio Safety committee vi) Project type vii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.

- Click on the project title to view the 'View Project' page displaying the existing project details.
- To edit the details of the project, select 'Edit', change the required field(s) and save these changes.

#### 4.10 Link a substance to a project

A substance must first be assigned to an owner i.e. Principle Investigator before it can be linked to a project.

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' projects only iv) Principle Investigator v) GM/Bio Safety committee vi) Project type vii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.
- Click on the project title to see the 'View Project' page displaying the existing project details.
- Scroll down to 'Linked Substances' and select 'Link a Substance'
- On the 'Link a Substance' page, the substances owned by the Principle Investigators in your School will be listed.
- Search for the substances owned by that Principle Investigator and select  to link the appropriate substance to that project
- On the 'View Project' page the substance(s) linked to that project are displayed under 'Linked Substances'.
- On the 'View Project' page under 'Linked Substances' there is also an icon to unlink a substance to a project.

#### 4.11 View room contents

- Click on the 'Admin' tab
- Click on 'Manage Rooms' from the menu on the left of the screen to list all the rooms in your School.
- Search for a room using the Building or Room fields (active or inactive substances can be searched for)
- Click the room name
- On the 'View Room' page scroll down to 'Substances' to display the substances that have been recorded for that room.



## 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 Register a Biological Researcher

- Click on the 'Admin' tab
- Click on the 'Manage Users' tab
- Scroll down the list of registered Users in RETAIN or search for Biological Researchers using the search function.
- If the Researcher is not registered in RETAIN, click 'Add User' and search using their UUN and save
- On the 'View User' page assign a Biological Researcher role to the 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.

### 5.2 Assign a Biological Researcher to a Principle Investigator

- Click on the 'Admin' tab
- Click on the 'Manage Users' tab
- Enter the UUN or name of the Principle Investigator to whom the Biological Researcher is to be assigned and click filter
- Click on the UUN of the Principle Investigator
- On the 'View User' page scroll down to 'Assigned Biological Researchers' and select the researcher to be assigned to this Principle Investigator



### 5.3 Add a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Click on 'Add Substance'
- To add a new biological substance, type the first few letters of the name of that substance that you wish to add in the 'Biological Agent' box and click on the correct substance on the list that appears
- Select whether the substance is genetically modified or not and click continue
- On the 'New Biological Substance' page enter details of the substance. Information that is mandatory is: i) School reference ii) GM name if applicable iii) number of vials iv) Building name v) Principle Investigator responsible for the substance vi) GM/Bio Safety committee.
- For Schedule 5 substances, Room number and Fridge/Freezer are also mandatory fields.

### 5.4 Request the addition of a new substance to RETAIN

- 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.
- Only an Administrator can add a new substance to the list in the RETAIN database. Please contact [biosafety@ed.ac.uk](mailto:biosafety@ed.ac.uk) to request that a substance is added.

### 5.5 Find or edit a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) Principle Investigator responsible for the substance iv) GM name if applicable v) 'active' or 'inactive' substance (cannot edit an archived substance but details of the original record can be viewed) vi) date range that a substance was recorded in RETAIN and then click on filter.
- Click on the substance name to view the information that has been recorded in RETAIN for that substance.
- To edit a substance record, on the 'View Substance' page select 'Edit', change the required field(s) and save any changes.

### 5.6 Archive 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 unlinked from the project before the substance is archived.

- Click on the 'Biological' tab



- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) 'active' substances only iv) Principle Investigator responsible for the substance v) GM name, if applicable vi) date range that a substance has been recorded in RETAIN and then click on filter.
- Click on the substance name to view the information that has been recorded in RETAIN for that substance
- To archive a substance, on the 'View Substance' page select 'Archive' and select the disposal route for the substance and save. Additional disposal detail must be provided for Schedule 5 materials.

### 5.7 Add a GM project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'GM' and enter the relevant GM project information in the listed fields
- Information that is mandatory is i) Project title ii) Class (if there is no Class please select Not Required) iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project

### 5.8 Add a BA project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'BA' and enter the relevant BA project information in the listed fields
- Information that is mandatory is i) Project title ii) Containment level iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project

### 5.9 Find or edit a project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' or 'inactive' project (cannot edit an archived project but details of the original record can be viewed) iv) Principle Investigator v) GM/Bio Safety committee vi) Project type vii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.
- Click on the project title to view the 'View Project' page displaying the existing project details.



- To edit the details of the project, select 'Edit', change the required field(s) and save these changes.

### 5.10 Link 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.

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' projects only iv) Principle Investigator v) GM/Bio Safety committee vi) Project type vii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.
- Click on the project title to see the 'View Project' page displaying the existing project details.
- Scroll down to 'Linked Substances' and select 'Link a Substance'
- On the 'Link a Substance' page the substances owned by that Principle Investigator will be listed.
- At 'Link to Project' select  to link that substance to that project
- On the 'View Project' page the substance(s) linked to that project are displayed under 'Linked Substances'.
- On the 'View Project' page under 'Linked Substances' there is also an icon to unlink a substance to a project.

## 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 Add a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen



- Click on 'Add Substance'
- To add a new biological substance, type the first few letters of the name of that substance that you wish to add in the 'Biological Agent' box and click on the correct substance on the list that appears
- Select whether the substance is genetically modified or not and click continue
- On the 'New Biological Substance' page enter details of the substance. Information that is mandatory is: i) School reference ii) GM name if applicable iii) number of vials iv) Building name v) Principle Investigator responsible for the substance vi) GM/Bio Safety committee.
- For Schedule 5 substances, Room number and Fridge/Freezer are also mandatory fields.

## 6.2 Request the addition of a new substance to RETAIN

- 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.
- Only an Administrator can add a new substance to the list in the RETAIN database. Please contact [biosafety@ed.ac.uk](mailto:biosafety@ed.ac.uk) to request that a substance is added.

## 6.3 Find or edit a substance

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) Principle Investigator responsible for the substance iv) GM name if applicable v) 'active' or 'inactive' substance (cannot edit an archived substance but details of the original record can be viewed) vi) date range that a substance has been recorded in RETAIN and then click on filter.
- Click on the substance name to view the information that has been recorded in RETAIN for that substance.
- To edit a substance record, on the 'View Substance' page select 'Edit', change the required field(s) and save any changes.

## 6.4 Archive 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.

- Click on the 'Biological' tab
- Click on 'Substance' from the menu on the left of the screen
- Search for a substance using one or more of the following fields: i) School or HSE reference ii) substance name iii) Principle Investigator responsible for the



substance iv) GM name if applicable v) 'active' substances only vi) date range that a substance(s) has been recorded in RETAIN and then click on filter.

- Click on the substance name to view the information that has been recorded in RETAIN for that substance
- To archive a substance, on the 'View Substance' page select 'Archive' and select the disposal route for the substance and save. Additional disposal detail must be provided for Schedule 5 materials.

### 6.5 Add a GM project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'GM' and enter the relevant GM project information in the listed fields
- Information that is mandatory is i) Project title ii) Class (if there is no Class please select Not Required) iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project

### 6.6 Add a BA project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Click on 'Add Project'
- On the 'Add Project' page select 'BA' and enter the relevant BA project information in the listed fields
- Information that is mandatory is i) Project title ii) Containment level iii) School iv) Principle Investigator v) GM/Bio Safety committee vi) Approval/Start date for the project.

### 6.7 Find or edit a project

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' or 'inactive' project (cannot edit an archived project but details of the original record can be viewed) iv) Principle Investigator v) GM/Bio Safety committee vi) Project type vii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.
- Click on the project title to view the 'View Project' page displaying the existing project details.
- To edit the details of the project, select 'Edit', change the required field(s) and save these changes.



## 6.8 Link a substance to a project

A substance must first be assigned to an owner i.e. Principle Investigator before it can be linked to a project.

- Click on the 'Biological' tab
- Click on 'Projects' from the menu on the left of the screen
- Search for a project using one or more of the following fields: i) Project title ii) School/HSE reference iii) 'active' projects only v) Principle Investigator v) GM/Bio Safety committee vi) Project type viii) GM Class viii) Containment Level ix) SAPO/PHO Licence reference and then selecting filter.
- Click on the project title to see the 'View Project' page displaying the existing project details.
- Scroll down to 'Linked Substances' and select 'Link a Substance'
- On the 'Link a Substance' page the substances owned by that Principle Investigator will be listed.
- At 'Link to Project' select  to link that substance to that project
- On the 'View Project' page substance(s) linked to that project are displayed under 'Linked Substances'.
- On the 'View Project' page under 'Linked Substances' there is also an icon to unlink a substance to a project.

## Document version

Version number	Summary of change	Date and by whom
1.0	New document	29/06/22 Fiona Harris
2.0	New template, and changes required for new database	20/02/25 Fiona Harris

If you require this document in an alternative format please contact The Health and Safety Department on [health.safety@ed.ac.uk](mailto:health.safety@ed.ac.uk) or call (0131) 651 4255