

## Appendix A: UMMS Electronic Lab Notebook Ownership & User Access Guidelines

# Electronic Lab Notebook Ownership & User Access

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The creator of a LabArchives notebook is the first “owner” of the notebook. The Principal Investigator (PI) that is responsible for his or her lab, its research, and the research data that the lab produces should make sure that all of the lab members are following one of these possible ownership scenarios:

- 1) **Lab members create their own notebooks and share data with the lab team/PI:**
  - a. All lab members **transfer ownership** of their notebooks to the PI so that the PI becomes the “owner”. [Instructions for Transferring Ownership of a Notebook](#)
  - OR**
  - b. All lab members **change the PI’s role to “Administrator”** of the notebook. Changing the PI’s role to Administrator will give the PI the highest level of permissions in the notebook but will allow the lab team member to remain as “owner”. [Instructions for Changing Users Roles and Privileges](#)
- 2) **The PI creates a team / lab notebook and then shares it by invitation with the lab members:**

Even though the lab members can be invited to the team/lab notebook owned by the PI, they also automatically get their own notebook by default when their LabArchives account is created. PIs should make sure that these individual notebooks do not contain any important team / lab research data in them. If they do, they should consider either solution 1a or 1b above before there is any change in the lab member’s status as a contributing member of the lab or employment with the University.

### **When a lab member leaves the University or is finished participating in the lab’s research**

- Lab members need to transfer ownership of their notebook(s) to the PI, if it has not been transferred already.  
[Instructions for Transferring Ownership of a Notebook](#)
- PIs and/or Notebook owners should remove the lab member’s access to all of the lab’s notebooks.

### **When a PI leaves the University**

The notebooks that a PI “owns” in the UMMS Enterprise account are technically property of the University. A PI can still make a copy of their notebooks to take with them when they leave, but the original notebook must remain at the University.

Three ways to copy a notebook:

- a. [Create a PDF copy](#)
- b. [Create an offline, static HTML copy](#)
- c. [Create a “clone” of the notebook](#)

### **Archiving of electronic lab notebooks**

Information Technology is working closely with the Library and University Administration to develop a digital notebook archiving process for electronic lab notebooks when a PI leaves the University or if a lab is dissolved. In the meantime, please reach out to the UMMS LabArchives Support Team if this situation occurs.