

## Creating accounts and granting permission in the Pteridophyte Collections Consortium Symbiota Portal (Pteridoportal)

### Creating a new account in the Symbiota Pteridoportal:

Go to <http://www.pteridoportal.org/portal/> and click on the **New Account** link in the upper right hand corner:



In addition to the required fields on the Create New Profile page, please include your institution.

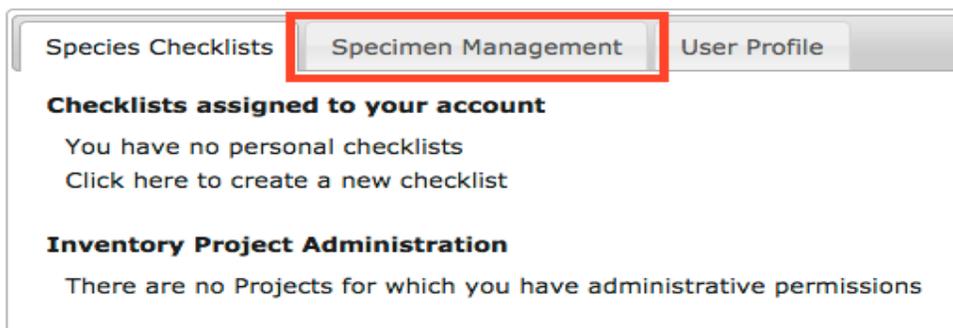
Once you have created a new profile, you will need to be given privileges to the portal. If you are the administrator for your institution's collection in the Pteridoportal, you will need to contact the portal manager, Joyce Gross ([joyceg@berkeley.edu](mailto:joyceg@berkeley.edu)) to receive administrative access to your collection. Once your collection has an administrator, the administrator can grant privileges to any additional users at your institution.

### Granting users privileges to your institution's collection in the Pteridoportal:

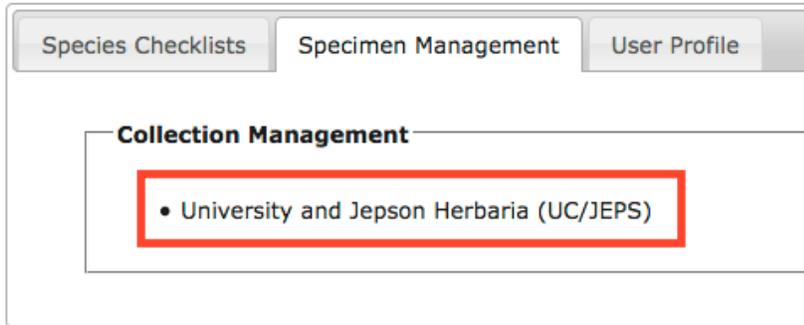
Have the user create an account as shown above. Login to the Pteridoportal and click on the **My Profile** link in the upper right hand corner:



From the next screen, click on the **Specimen Management** Tab:

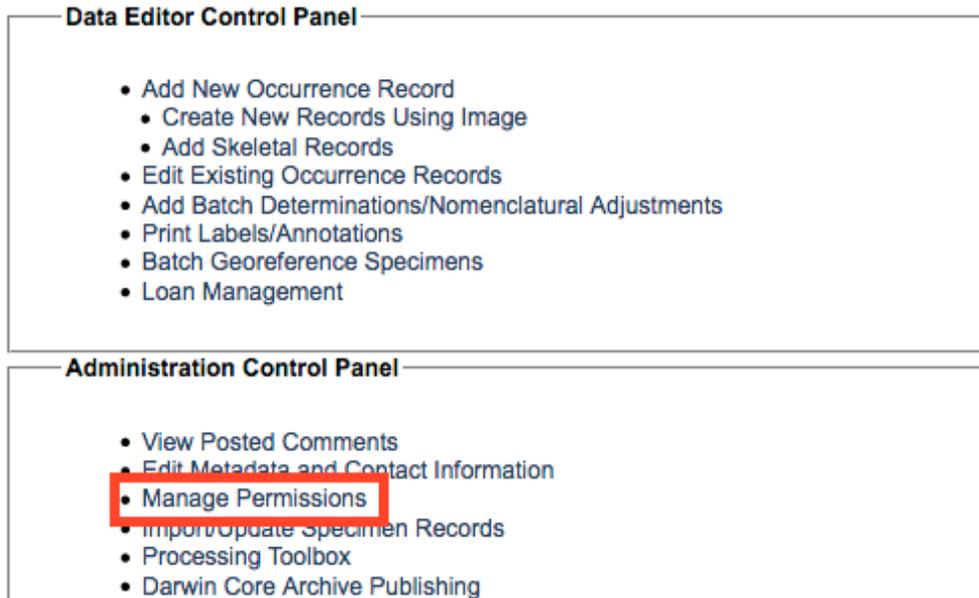


From the **Specimen Management** Tab, choose the collection you will be providing access to:

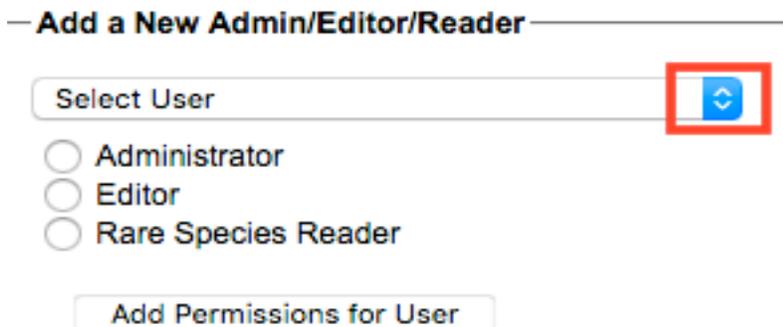


From the Collection Tab, click on the **Manage Permissions** link:

## University and Jepson Herbaria (UC/JEPS)



Scroll down to the **Add a New Admin/Editor/Reader** section and click on the blue dropdown arrow next to Select User:



Select the person's account from the dropdown list and choose the level of permissions they will be granted:

Administrator: You should create limited Administrator accounts for your collection

Editor: Editors can edit and add specimen records. Most of your data entry staff will be Editors.

Rare Species Reader: Can access any rare species data that would be hidden from regular users.

Click on Add Permissions for User and they will be given permissions for your collection.

**Add a New Admin/Editor/Reader**

Wetherwax, Margriet (mwetherwax) 

Administrator

Editor

Rare Species Reader

Once you click on **Add Permissions for User**, the user will be added to your permissions list:

**Administrators**

- Kasameyer, Amy 
- Rothfels, Carl 

**Editors**

- Wetherwax, Margriet 

\*Administrators automatically inherit editing rights

**Rare Species Readers**

**There are no Sensitive Species Reader permissions**

\*Administrators and editors automatically inherit protected species viewing rights

To delete permissions for a user, click on the red "X" next to their name in this list.