

CNDDDB Subscription User Management Instructions

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1. Overview

Beginning February 4, 2020, any subscription user wishing to access California Natural Diversity Database (CNDDDB) data will be required to register for an individual CDFW account and be listed as an authorized user under a current CNDDDB subscription. This includes access to all CNDDDB-related data and tools, including RareFind 5, the CNDDDB and Spotted Owl Data Viewer, CNDDDB-related datasets in BIOS, and downloadable GIS files for both the CNDDDB and Spotted Owl Observations Database. This requirement has been enacted to provide subscribers with a mechanism for controlling who has access to their subscription. Additionally, this new system will allow CNDDDB staff to provide better customer service and communicate more effectively and directly with users. Finally, it addresses security concerns associated with using a single account to provide access for thousands of individuals.

To facilitate this new requirement, CDFW has developed a custom web application that will allow subscribing organizations to independently manage the users authorized under their subscription. The [CNDDDB Subscriptions User Management Application](#) utilizes the same self-service accounts that the CDFW Data Portal uses, although it is a separate application. This reduces the number of login credentials a given individual must keep track of, especially for those who use other Data Portal applications (such as the CNDDDB Online Field Survey Form). The User Management app operates by cross-referencing email addresses from the self-service accounts with a database of CNDDDB subscriber information to verify that a given user has been authorized. Each subscribing organization will have two administrators who are responsible for maintaining the list of authorized users for their organization.

How it works:

Step 1: Users create individual CDFW self-service accounts.

Step 2: Subscription administrators add a list of authorized users to their subscription.

Detailed, step-by-step instructions are provided below to assist administrators and users with setting up and managing their accounts and user lists. Solutions to Frequently Asked Questions are provided at the end of the document and will be updated periodically to address the most commonly encountered issues.

For questions, concerns, or to report a problem, please contact Information Services at 916-322-2493 or BDB@wildlife.ca.gov.

2. New Subscriptions

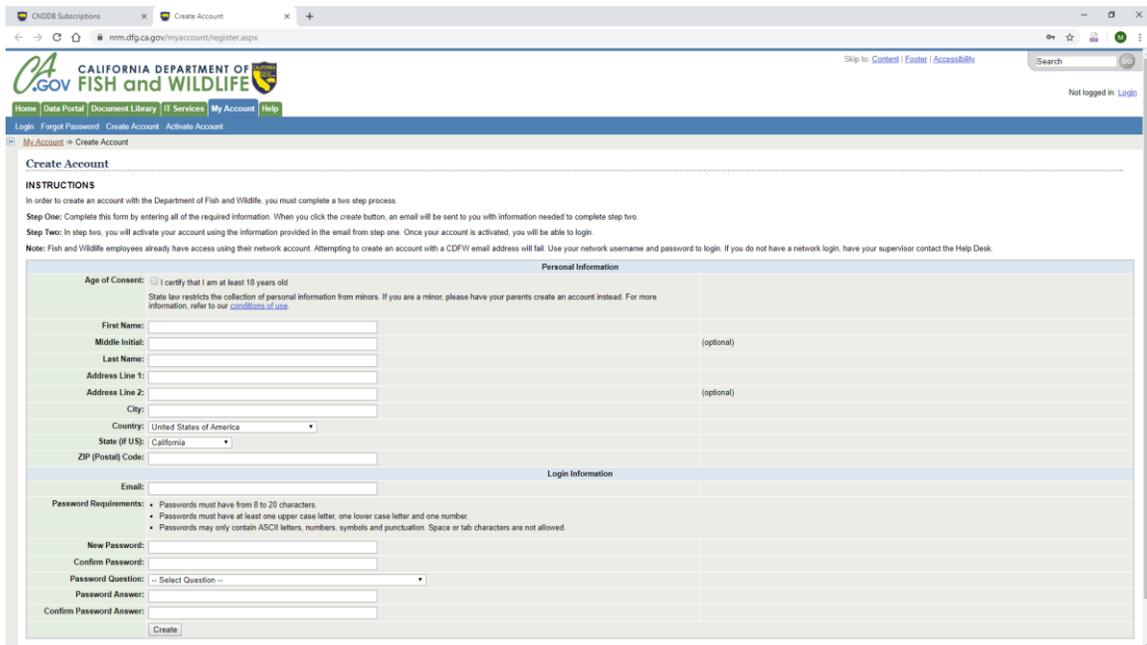
- 2.1. **If you already have an active CNDDDB subscription, skip to Section 3.** No additional fees are required to access the user management system.
- 2.2. If you are not a current CNDDDB subscriber, complete a Subscription Order Form (available for download at <https://www.wildlife.ca.gov/Data/CNDDDB/Subscribe>), and submit to BDB@wildlife.ca.gov. Be sure to provide email addresses for primary and secondary contacts – those individuals will be given administrative rights to manage authorized users for the subscription.
- 2.3. Once you have submitted your Subscription Order Form, you will receive an email from the BDB Information Services Coordinator confirming receipt, with detailed payment instructions and a Subscription Account Number.
- 2.4. Submit payment. Check payments are routed through BDB Information Services; credit card payments can be made online using the CDFW Online License and Sales Service (<https://www.ca.wildlifelicense.com/InternetSales/>). Subscriptions can be purchased as a Guest user; if subscribers opt to create a customer account in the online licensing application, please note that these accounts are separate from the accounts created below, and any changes to one will NOT be automatically transferred to the other.

3. Managing Authorized User Lists (Subscription Administrators)

3.1. Primary and secondary contacts for each subscription will be given administrator privileges in the User Management app. Each administrator will need to register for a CDFW account in order to access and manage authorized users for their subscription. Navigate to <https://apps.wildlife.ca.gov/cnddb-subscriptions/>, click “Register” on the right side of the page.



3.2. This will take you to the CDFW self-service account registration portal (<https://nrm.dfg.ca.gov/myaccount/register.aspx>). Follow the on-screen instructions to create and activate a CDFW account.



3.2.1. Enter the required information in the form shown above and click the “Create” button. This will send an email to the entered email address with information needed to complete activation. NOTE: The email address entered here *must* match the email address associated with the primary or secondary contact for the CNDDDB subscription. If you have a previously-

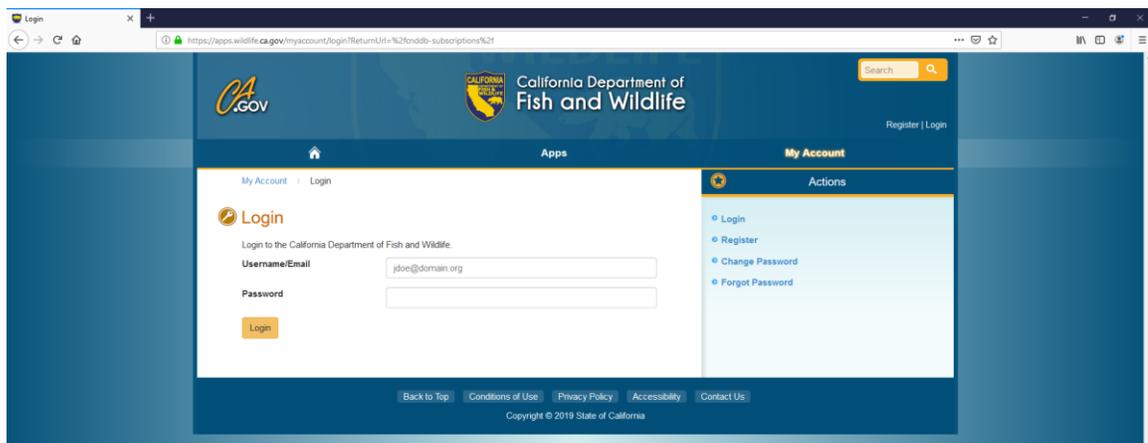
existing CDFW account (e.g., for using the CNDDDB Online Field Survey Form application), you do not need to create a new account, as long as the email address is the same as that of the primary or secondary contact associated with the CNDDDB subscription.

3.2.2. Activate your new individual CDFW account by following the instructions in the email you received after completing the previous step.

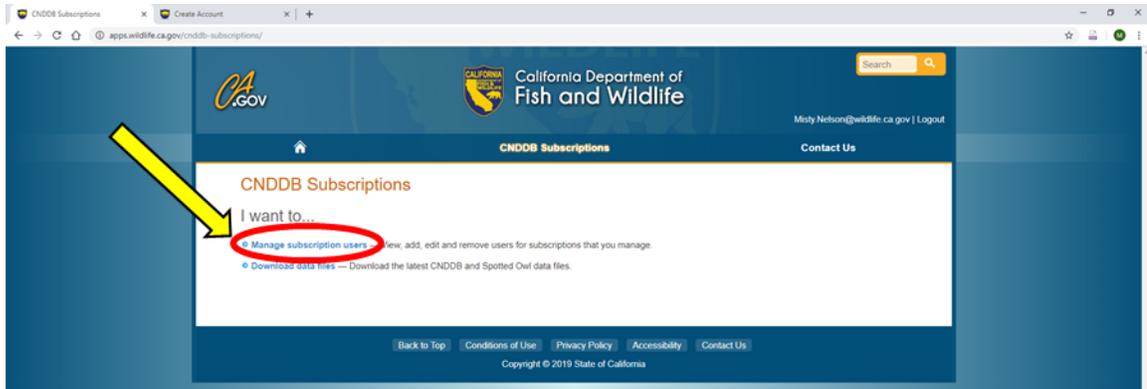
3.3. Once the administrator's individual CDFW account has been created and activated, return to the CNDDDB Subscription Management application at <https://apps.wildlife.ca.gov/cnddb-subscriptions/> and select "Login" from the upper right. Note that it may take up to an hour for the systems to synchronize and your subscription to be visible; you may also need to refresh your browser.



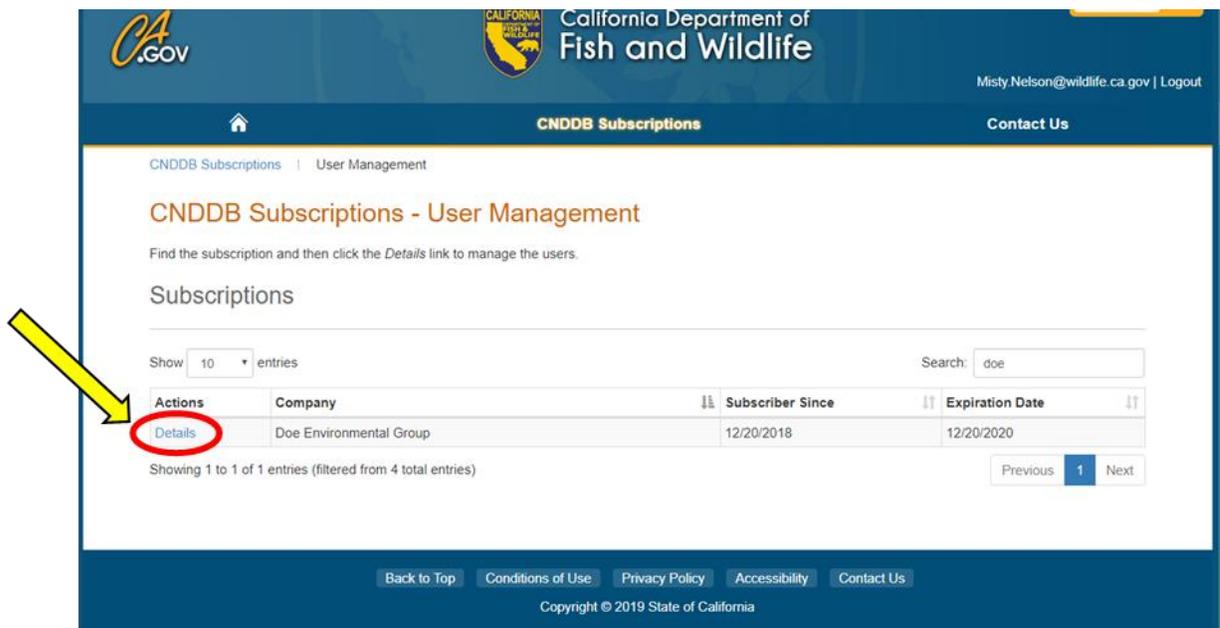
3.4. Use your new CDFW account credentials (*not* cnddb_gov or cnddb_com) to log in to the user management system.



3.5. Select "Manage subscription users" to view a list of subscriptions for which a given individual is either a primary or secondary contact.



3.6. Select “Details” for the subscription you wish to access



3.7. Users can be added in one of two ways: individually, using the “Add User” link; or via “Bulk Update” from a Comma Separated Values (CSV) file containing a list of user email addresses. NOTE: **Administrators must also add themselves as users** if they are going to access RareFind, CNDDDB in BIOS, or GIS data downloads.

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Misty.Nelson@wildlife.ca.gov | Logout

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CNDDB Subscriptions | User Management | 2524

Subscription: #2524 – Doe Environmental Group Show/Hide

Account #	2524	Company	Doe Environmental Group
Subscriber Since	12/20/2018	Expiration Date	12/20/2020

Users Add User Bulk Update

Copy CSV

Actions	Email	Full Name [§]	Account Verified?	Last Modified
<a>Edit <a>Delete	joan.doe@DEG.com		No	4/19/2019, 4:30:44 PM

§ The Full Name is populated from the user account. Thus, it is only present when the account is verified.

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3.7.1. To add users individually, select “Add User.” On the Add Subscription User page, enter the user’s email address, and select “Save.”

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CNDDB Subscriptions | User Management | 2524 | Add User

Add Subscription User

Email

Save Cancel

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3.7.2. The user will then be added to the authorized user list. The “Full Name” field will be populated automatically once the user has created a CDFW account and the account has been verified.

Added subscription user jane.doe@DEG.com

Subscription: #2524 – Doe Environmental Group [Show/Hide](#)

Account #	2524	Company	Doe Environmental Group
Subscriber Since	12/20/2018	Expiration Date	12/20/2020

Users [Add User](#) [Bulk Update](#)

[Copy](#) [CSV](#)

Actions	Email	Full Name [§]	Account Verified?	Last Modified
Edit Delete	jane.doe@DEG.com		No	9/26/2019, 12:39:04 PM
Edit Delete	joan.doe@DEG.com		No	4/19/2019, 4:30:44 PM

§ The Full Name is populated from the user account. Thus, it is only present when the account is verified.

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3.8. The Bulk Update option includes two choices, “Add Only” or “Replace”

- 3.8.1. Use “Add Only” to add new users from the supplied file. Any email addresses in the CSV file not already in the list will be added; email addresses in the user list that are not included in the CSV file will remain in the user list.
- 3.8.2. Use “Replace” to completely overwrite the existing user list. This will add any email addresses not already in the user list, and will also delete any users not in the CSV file.

CNDDDB Subscriptions | User Management | Users | Bulk Update

CNDDDB Subscriptions - User Management - Bulk Update

Subscription: #2524 – Doe Environmental Group

Account #	2524
Company	Doe Environmental Group
Subscriber Since	12/20/2018
Expiration Date	12/20/2020

Bulk Update Information

Use this Bulk Update form to update the users for your subscription. You may select either the *Add Only* or *Replace* update option. The *Add Only* option only adds subscribers. The *Replace* option both adds and removes subscribers. There is no undo step or verification step. You may want to download a copy of your current users before performing the bulk update.

- You may upload a text file in CSV format only.
- The file must have column headings in the first row and one of the column headings must be named *Email*.
- Users will be matched by their email address.
- Any email address in the file that does not match a current user will cause a new user to be added.
- With the *Replace* option, any user not in your file will be removed.
- Matching users will not be modified.

Example:

```
Name, Email
"Doe, John", jdoe@myorg.name
"Roe, Jane", jroe@myorg.name
```

CSV File No file chosen

Add Only – subscribers will be added from the supplied file.
 Replace – subscribers will be added and removed based on the supplied file.

3.8.3. Follow the instructions on the Bulk Update page for details on formatting the CSV file. Select the preferred option to Add Only or Replace the user list and use the “Choose File” button to select the CSV file. Select “Submit” to upload the CSV file.

3.8.4. The application will automatically verify CDFW accounts within an hour of any changes to the authorized user list. All users will need to create individual CDFW accounts (see section 4), and the email addresses for those accounts *must* match the email addresses in the user list for verification to succeed.

4. Creating Individual Self-Service Accounts (Authorized Users)

- 4.1. To register for a CDFW account, navigate to the CDFW self-service account registration portal (<https://nrm.dfg.ca.gov/myaccount/register.aspx>) and follow the instructions. NOTE: The email address used to create the CDFW account *must* match the email address associated with the CNDDDB subscription user list. If a user has a previously-existing CDFW account (e.g., for using the CNDDDB Online Field Survey Form application), you do not need to create a new account, as long as the email address is on the list of authorized users for your subscription organization.

- 4.1.1. Enter the required information in the form shown above and click the “Create” button. This will send an email to the entered email address with information needed to complete activation.
- 4.1.2. Activate your new individual CDFW account by following the instructions in the email you received after completing the previous step.
- 4.2. Users can create a CDFW account at any time but will only gain access to CNDDDB data once their email address has been added to a subscription’s authorized user list, and the application has verified their account. Note that **it may take up to an hour** for the applications to synchronize and verify.

5. Frequently Asked Questions

➤ General

Is there a limit to the number of authorized users allowed under a single subscription?

- ✓ No. As long as you are adhering to the terms and conditions of the [CNDDDB License Agreement](#), you can add as many users as you'd like.

Will there be a change in subscription fees or cost associated with this new system?

- ✓ No, we are not changing the CNDDDB fee structure at this time.

➤ Subscription Administrators

I am having trouble logging in as a subscription administrator, or am not seeing my subscription listed

- ✓ Have you [created](#) an individual CDFW self-service account for yourself?
- ✓ Have you [activated](#) your individual CDFW self-service account?
- ✓ Does the email address for your individual CDFW self-service account match the email address we have on file for your subscription? For example, if our contact email address for your subscription is JohnDoe@MyOrg.com and you create a CDFW self-service account with the email address JDoe@MyOrg.com, the Subscription User Management app will not recognize you as an administrator because those email addresses don't match. Contact BDB@wildlife.ca.gov to confirm.
- ✓ Are you using the correct URL to log in to the Subscription User Management application? (i.e., <https://apps.wildlife.ca.gov/cnddb-subscriptions/>, as opposed to <https://nrm.dfg.ca.gov/myaccount/MySubscriptions.aspx>, which is used for other Data Portal subscriptions, but not CNDDDB)
- ✓ Is your subscription account active and payment up to date? Contact BDB@wildlife.ca.gov for orders and payment information.

I am logged in as a subscription administrator, but am unable to access CNDDDB data in RareFind, BIOS, or from the GIS data download page

- ✓ Have you added yourself as an authorized user under your subscription?
- ✓ Have you waited at least one hour since activating your individual CDFW self-service account and/or adding your email address to the authorized user list?

- ✓ Have you updated your bookmarks? Please visit the [CNDDDB Data Downloads web page](#) for the correct links.

I am encountering errors when trying to Bulk Upload a list of authorized users

- ✓ Did you remember to save your file as a .CSV?
- ✓ Does your .CSV file contain a header row, with *Email* as one of the column headings?

➤ [Authorized Users](#)

I am having trouble accessing CNDDDB data through RareFind or BIOS

- ✓ Have you [created](#) an individual CDFW self-service account for yourself?
- ✓ Have you [activated](#) your individual CDFW self-service account?
- ✓ Has your subscription administrator added your email address to the list of authorized users for your organization? Check with your subscription administrator to confirm.
- ✓ Does the email address for your individual CDFW self-service account match the email address that was entered in the list of authorized users? For example, if the email address added to the authorized user list is JohnDoe@MyOrg.com, and you create a CDFW self-service account with the email address JDoe@MyOrg.com, the Subscription User Management app will not recognize you as an authorized user because those email addresses don't match. Check with your subscription administrator to confirm.
- ✓ Have you waited at least one hour since activating your individual CDFW self-service account and/or having your email address added to the authorized user list?
- ✓ Have you updated your bookmarks for the data download page? Please visit the [CNDDDB Data Downloads web page](#) for the correct links.

I am unable to access CNDDDB data downloads

- ✓ Have you [created](#) an individual CDFW self-service account for yourself?
- ✓ Have you [activated](#) your individual CDFW self-service account?
- ✓ Has your subscription administrator added your email address to the list of authorized users for your organization? Check with your subscription administrator to confirm.

- ✓ Does the email address for your individual CDFW self-service account match the email address that was entered in the list of authorized users? For example, if the email address added to the authorized user list is JohnDoe@MyOrg.com, and you create a CDFW self-service account with the email address JDoe@MyOrg.com, the Subscription User Management app will not recognize you as an authorized user because those email addresses don't match. Check with your subscription administrator to confirm.
- ✓ Have you waited at least one hour since activating your individual CDFW self-service account and/or having your email address added to the authorized user list?
- ✓ Have you updated your bookmarks for the data download page? Please visit the [CNDDDB Data Downloads web page](#) for the correct links.

How do I change the email address associated with my individual CDFW self-service account?

1. Log in to the Data Portal with your individual self-service account credentials
2. Click the My Account tab
3. In the Additional box, click the Change Email Address link
4. In the box provided, enter the new email address
5. Click the Submit Email Change link
6. An email message is sent to the new address with a confirmation code to ensure that the user has access/control of the email account; follow the instructions to confirm the email address change
7. If problems are encountered, contact Data Portal Support via the Help tab in the Data Portal, or by emailing DataPortal@wildlife.ca.gov