## CNDDB Subscription User Management Instructions

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### 1. Overview

Beginning February 4, 2020, any subscription user wishing to access California Natural Diversity Database (CNDDB) data will be required to register for an individual CDFW account and be listed as an authorized user under a current CNDDB subscription. This includes access to all CNDDB-related data and tools, including RareFind 5, the CNDDB and Spotted Owl Data Viewer, CNDDB-related datasets in BIOS, and downloadable GIS files for both the CNDDB 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 CNDDB 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 <u>CNDDB Subscriptions User Management Application</u> 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 CNDDB Online Field Survey Form). The User Management app operates by cross-referencing email addresses from the self-service accounts with a database of CNDDB 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 <u>BDB@wildlife.ca.gov</u>.

### 2. New Subscriptions

- 2.1. If you already have an active CNDDB subscription, skip to Section 3. No additional fees are required to access the user management system.
- 2.2. If you are not a current CNDDB subscriber, complete a Subscription Order Form (available for download at <a href="https://www.wildlife.ca.gov/Data/CNDDB/Subscribe">https://www.wildlife.ca.gov/Data/CNDDB/Subscribe</a>), and submit to <a href="https://www.wildlife.ca.gov">BDB@wildlife.ca.gov</a>. 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 (<u>https://www.ca.wildlifelicense.com/InternetSales/</u>). 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 <u>https://apps.wildlife.ca.gov/cnddb-subscriptions/</u>, click "Register" on the right side of the page.



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

NDDB Subscriptions ×	Create Account × +			- 0
→ C 🏠 🔒 nrm.dfg.ca	.gov/myaccount/register.aspx			야 ☆ 🔒 🔮
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Data Portal Document Libra	ry IT Services My Account Help			
	unt Activate Account			
Account -> Create Account				
reate Account				
STRUCTIONS				
order to create an account with the	e Department of Fish and Wildlife, you must complete a two step	process.		
ep One: Complete this form by en	tering all of the required information. When you click the create t	button, an email will be sent to you with information needed to complete step two.		
ep Two: In step two, you will activ	ate your account using the information provided in the email from	n step one. Once your account is activated, you will be able to login.		
te: Fish and Wildlife employees a	Iready have access using their network account. Attempting to c	reate an account with a CDFW email address will fail. Use your network username and passw	ord to login. If you do not have a network login, have your supervisor contact the Help Desk.	
		Personal Information		
Age of Consent:	I certify that I am at least 18 years old     State law restricts the collection of personal information from mir information, refer to our <u>conditions of use</u> .	nors. If you are a minor, please have your parents create an account instead. For more		
First Name:				
Middle Initial:			(optional)	
Last Name:				
Address Line 1:				
Address Line 2:			(optional)	
City:				
Country:	United States of America *			
State (if US):	California •			
ZIP (Postal) Code:				
Email:		Login Information		
Password Requirements:	Passwords must have from 8 to 20 characters.     Passwords must have at least one upper case letter, one low     Passwords may only contain ASCII letters, numbers, symbols	er case letter and one number. s and punctuation. Space or tab characters are not allowed.		
New Password:				
Confirm Password:				
Password Question:	Select Question	*		
Password Answer:				

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 CNDDB subscription. If you have a previouslyexisting CDFW account (e.g., for using the CNDDB 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 CNDDB 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 CNDDB Subscription Management application at <u>https://apps.wildlife.ca.gov/cnddb-subscriptions/</u> 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.

0.gov	California Department of Fish and Wildlife	Resist / Logn
*	CNDDB Subscriptions	Contact Us
CNDDB Subscrip	tions	
Please login to use this system		

3.4. Use your new CDFW account credentials (*not* cnddb\_gov or cnddb\_com) to log in to the user management system.

😴 Login X 🕂			– a ×
← → C <sup>a</sup> @ ① ● https://apps.wildlife.ca.gov/myac	ount/login?ReturnUrl=%2fonddb-subscriptions%2f		… ♡ ☆
Caov	California Department of Fish and Wildlife	Search Q Register   Logn	
	Apps	My Account	
My Account 1	Login	C Actions	
🖉 Login		● Login	
Login to the Cali	mia Department of Fish and Wildlife.	© Register	
Username/Ema	jdoe@domain.org	Change Password	
Password		Forgot Password	
Login			
	Back to Top Conditions of Use Privacy Policy Accessibility Copyright © 2019 State of California	Contact Us	

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

CNDDB Subscriptions X Create	Account X   +			- 0 > + 2 0
	<i>Cl</i> Gov	California Department of Fish and Wildlife	Search Q	
	â	CNDDB Subscriptions	Contact Us	
	CNDDB Subscri I want to • Manage subscription user • Download sala files - Dow	Ptions New, add, edit and remove users for subscriptions that you manage. Inload the latest CNDDB and Spotted Owl data files.		
		Back to Top Conditions of Use Privacy Policy Accessibility Contact I Copyright © 2019 State of California	Us	

3.6. Select "Details" for the subscription you wish to access

	CNDDB Subscrip	CNDDB Subscriptions			Contact Us	4
	CNDDB	Subscriptions - User Management				
	Find the subscrip	tion and then click the Details link to manage the users.				
	Subscript	ions				
L	Show 10 *	entries		Search	n: doe	
M	Actions	Company	Subscriber Since	↓† Ex	piration Date	41
-(	Details	Doe Environmental Group	12/20/2018	12	/20/2020	
	Showing 1 to 1 of	1 entries (filtered from 4 total entries)			Previous	Next

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, CNDDB in BIOS, or GIS data downloads.

GOV		Galif Fish	ornia Departme n and Wild	nt of life	Misty.Nelson@v	rildlife.ca.gov   Logout
â		CNDDB S	ubscriptions		Contact Us	
CNDDB Subscript	tions   User Management	2524				
Subscription	n: #2524 – Doe Environme	ntal Group			<b>▼</b> S	how/Hide
Account #	2524 12/20/2018		Company Expiration Date	Doe Environ 12/20/2020	mental Group	
Users Copy CSV					Add User B	ulk Update
Actions	Email	11 Full Name <sup>§</sup>	11 Account Verifie	ed? ↓↑	Last Modified	11
Edit   Delete	joan.doe@DEG.com		No		4/19/2019, 4:30:44 PM	
§ The Full Name is	populated from the user account. T	'hus, it is only present when i	the account is verified.			

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."

ronment! <i>O</i> .cov	California Department of Fish and Wildlife	Search Q Misty.Nelson@wildlife.ca.gov   Logout
â	CNDDB Subscriptions	Contact Us
CNDDB Subscriptions	User Management   2524   Add User	
Add Subscrip	tion User	
•	Email jane.doc@DEG.com	
	Save	
	Back to Top Conditions of Use Privacy Policy Accessibility Cor Copyright © 2019 State of California	ntact Us

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.

â		CNDDB Subscri	ptions	Contact Us
CNDDB Subscripti	ions I User Management I 2524			
Added subscript	ion user jane.doe@DEG.com!			
Subscription	: #2524 – Doe Environmental G	iroup		▼ Show/Hide
Account # Subscriber Since	2524 12/20/2018		Company         Doe Env           Expiration Date         12/20/20	ironmental Group 20
Users				Add User Bulk Update
Copy CSV				
Actions	Email 🕴	≟ Full Name <sup>§</sup> ↓1	Account Verified?	Last Modified
Edit   Delete	jane.doe@DEG.com		8 No	9/26/2019, 12:39:04 PM
Edit   Delete	joan.doe@DEG.com		8 No	4/19/2019, 4:30:44 PM
§ The Full Name is	populated from the user account. Thus, it is	; only present when the accou	int is verified.	
	Back to Top C	onditions of Use Privac Copyright © 2019 S	cy Policy Accessibility Contact state of California	zt Us

- 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.

A second di	DE0X
Company	2024 Doe Environmental Group
Subscriber Since Expiration Date	12/20/2018 12/20/2020
Bulk Update	Information
Use this Bulk Upda option only adds s download a copy o	te form to update the users for your subscription. You may select either the Add Only or Replace update option. The Add Only ubscribers. The Replace option both adds and removes subscribers. There is no undo step or verification step. You may want to I your current users before performing the bulk update.
You may upload a te	xt file in <u>CSV</u> format only.
The file must have o	olumn headings in the first row and one of the column headings must be named Email.
• Users will be match	ed by their email address.
• Any email address i	the file that does not match a current user will cause a new user to be added.
<ul> <li>With the Replace op</li> </ul>	tion, any user not in your file will be removed.
Matching users will	not be modified.
Example:	
Name,Email	/org.name yorg.name
Name,Email "Doe, John",jdoe@m "Roe, Jane",jroe@m	
Name,Email "Doe, John",jdoe@m "Roe, Jane",jroe@m	
Name,Email "Doe, John",jdoe@m "Roe, Jane",jroe@m CSV File	Chonse File No file chosen

- 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 (<u>https://nrm.dfg.ca.gov/myaccount/register.aspx</u>) and follow the instructions. NOTE: The email address used to create the CDFW account \*must\* match the email address associated with the CNDDB subscription user list. If a user has a previously-existing CDFW account (e.g., for using the CNDDB 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.

CNDDB Subscriptions ×	Create Account × +			- 0
→ C 🏠 🔒 nrm.dfg.ca.	gov/myaccount/register.aspx			아 ☆ 🔒 🕻
	department of		Skip to: Content   Footer   Accessibility	Search Not logged in: 1
e Data Portal Document Libra	ry IT Services My Account Help			
Forgot Password Create Accor	Int   Activate Account			
Account -> Create Account				
reate Account				
ISTRUCTIONS				
order to create an account with the	Department of Fish and Wildlife, you must complete a two step p	process.		
ep One: Complete this form by en	tering all of the required information. When you click the create bu	atton, an email will be sent to you with information needed to complete step two.		
tep Two: In step two, you will active	ate your account using the information provided in the email from	step one. Once your account is activated, you will be able to login.		
ote: Fish and Wildlife employees a	ready have access using their network account. Attempting to cre	sate an account with a CDFW email address will fail. Use your network username and pa	ssword to login. If you do not have a network login, have your supervisor contact the Help Desk.	
		Personal Information		
Age of Consent:	I certify that I am at least 18 years old State law restricts the collection of personal information from mino information, refer to our <u>conditions of use</u> .	rrs. If you are a minor, please have your parents create an account instead. For more		
First Name:				
Middle Initial:			(optional)	
Last Name:				
Address Line 1:				
Address Line 2:			(optional)	
City:				
Country:	United States of America			
State (if US):	California •			
ZIP (Postal) Code:				
From 1		Login Information		
Email:				
Password Requirements:	<ul> <li>Passwords must have from 8 to 20 characters.</li> <li>Passwords must have at least one upper case letter, one lower</li> <li>Passwords may only contain ASCII letters, numbers, symbols in</li> </ul>	r case letter and one number. and punctuation. Space or tab characters are not allowed.		
New Password:				
Confirm Password:				
Password Question:	Select Question	*		
Password Answer:				
Confirm Password Answer:				
	Create			

- 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 CNDDB 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 <u>CNDDB License Agreement</u>, 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?

 $\checkmark$  No, we are not changing the CNDDB 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 <u>created</u> an individual CDFW self-service account for yourself?
- ✓ Have you <u>activated</u> 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 <u>BDB@wildlife.ca.gov</u> to confirm.
- Are you using the correct URL to log in to the Subscription User Management application? (i.e., <u>https://apps.wildlife.ca.gov/cnddb-</u><u>subscriptions/</u>, as opposed to <u>https://nrm.dfg.ca.gov/myaccount/MySubscriptions.aspx</u>, which is used for other Data Portal subscriptions, but not CNDDB)
- ✓ Is your subscription account active and payment up to date? Contact <u>BDB@wildlife.ca.gov</u> for orders and payment information.

#### I am logged in as a subscription administrator, but am unable to access CNDDB 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 <u>CNDDB Data</u> <u>Downloads web page</u> 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 CNDDB data through RareFind or BIOS

- ✓ Have you <u>created</u> an individual CDFW self-service account for yourself?
- ✓ Have you <u>activated</u> 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 <u>CNDDB Data Downloads web page</u> for the correct links.

### I am unable to access CNDDB data downloads

- ✓ Have you <u>created</u> an individual CDFW self-service account for yourself?
- ✓ Have you <u>activated</u> 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 <u>CNDDB Data Downloads web page</u> 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 <a href="mailto:DataPortal@wildlife.ca.gov">DataPortal@wildlife.ca.gov</a>