

Collection Managers: Giving permissions

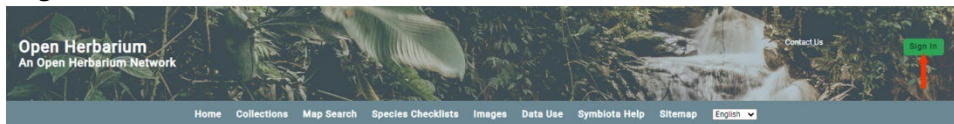
If you are a collection manager on a collection that contributes to one of the OpenSites, you (or anyone else you have designated as a manager of the collection, are responsible for giving individuals some of the permissions needed to use the tools in the portal. Some still have to go to the portal manager. For the OpenSites, that is currently me, Mary Barkworth. For other portals, the home page will say whom to contact.

For the screenshots in this document, I logged into OpenHerbarium as the collection manager of AJK. Cr. Tariq Habib. I do not see the same screens because I am the collection manager.

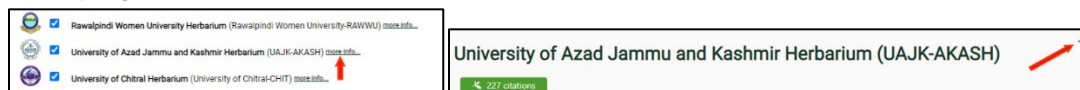
Finding the page

Locate the administration panel for your collection.

1. Log into the site.

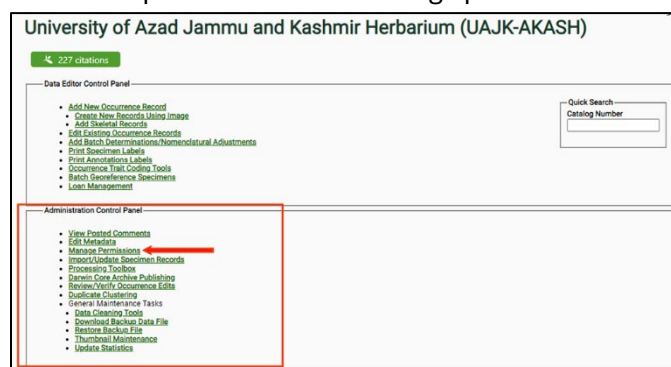


2. Under the “Collections” tab on the home page, locate your collection.
3. Click the “More Info” icon to the right of your collections name and then click the pencil icon on the top right of the next screen.



Only people given editing or management access to the collection records will see the pencil.

4. Clicking the pencil brings up the page shown below. Only collection managers see the lower box, the Administration control panel. Click the “Manage permission s” link.



A collection can have more than one “collection manager” in OpenHerbarium but, when I set up the collection, I only designate one, the person who asked me to set up the herbarium in

OpenHerbarium. That person can ask additional people to assist in managing the herbarium's records. The only time I would step in is if the primary collection manager does not respond to requests or comments concerning the records.

- At the top of the screen brought up by clicking "Manage permissions" there will 1 or 2 boxes showing the names of those with permission to edit and/or manager the collection (see box on right). AJK has several editors but no additional administrators. I blacked out the names of the editors but left in the red "X" that appears beside each name. Click the red X if you wish to remove one of the individuals as an editor or administrator. Removing people as administrators probably means that they would also lose editing privileges as well, but they could be added back as editors using the method described below.



- The figure below shows the permissions Collection Managers can give (see the figure below). They are described below the figure.

- Sensitive species readers.** IF a country has a list of its sensitive species, the portal manager can add it to the portal and then only individuals who have been given this permission can view the locality and geographic data and, in the care of herbarium specimens, the specimen image for those species. The goal is to make it harder for biopirates to locate such species. So far, neither of the OpenSites has a sensitive species list. It is also possible to specify that a species is sensitive in one country (or level 2 administrative area) and not elsewhere.

There are no rules for determining which species should be considered sensitive, nor where they are considered sensitive. Clearly, the IUCN ranking would be a good place to start building such a list but many species that have not been formally designated as endangered or vulnerable by the IUCN may be considered sensitive by government or local biologists and should be included on such a list.

- Add a new administrator or editor.** The individual must have an account in the portal. The people who do will be shown in order of their *last name*. Once you have found the correct name, click the buttons to give them the appropriate permission.

Administrators are automatically given editorial permission on your herbarium's

Editors can edit records in and add records to your collection. They can also delete records but that is something that should really be restricted to administrators.

Rare species readers need not be administrators or editors. They might be people employed by a government or non-government organization analyzing the distribution of sensitive species in some area. Until there is a list of sensitive species for your portal, there is no point clicking the “Rare species reader” button.

- 3. Personal Observation Management Sponsorship.** This allows people to enter field data (such as specimen and image based collection data) into their user profile and to print labels. Their specimen collection data can be pulled into the herbarium database once their specimens are donated to a herbarium and given a catalogue number [=barcode]. This permission should be given to students required to use OpenHerbarium to prepare the labels for specimens submitted as a class assignment. If their specimens are added to the collection, adding the label data will be easy.

Add their records ONLY to “General observations”, not the FoPk project.

- 4. Checklist/dataset Management Sponsorship.** This allows users to create new public and private checklists or datasets that are linked directly to their user profile. Public Checklists and Datasets are visible to all portal visitors.

For those unfamiliar with datasets, there is a great [YouTube video](https://www.youtube.com/watch?v=fL9KC2pvm6Q) at <https://www.youtube.com/watch?v=fL9KC2pvm6Q>. Again, people to whom you give this permission do not need to be editors or administrators of a herbarium in the portal.

Mary E. Barkworth, 27 February 2024