

Persephone plant records system

User manual

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Help video index

Basic guide to getting started - <https://vimeo.com/plantheritage/persephonebasicguide>

Creating a hybrid plant name - <https://vimeo.com/plantheritage/persephonehybrid>

Create custom notes fields - <https://vimeo.com/plantheritage/persephonecustomnotes>

Customise the plant name form - <https://vimeo.com/plantheritage/persephonecustom>

Customise the accession form - <https://vimeo.com/plantheritage/persephonecustomacc>

Add photos from a mobile - <https://vimeo.com/plantheritage/persephonemobile>



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1. Login & Passwords

To log into Persephone, type persephone2online.org.uk into your address bar. To find the site again easily, it is best to create a tab or a bookmark

- Type your **email address and password** into the boxes and click **Login** - remember to use the email address we contacted you on.
- If you forget your password click on 'password reminder' and follow the onscreen instructions.
- To change your password: Find the icon pictured right (top right of screen) click on the person icon and it will take you to the profile page where you can change your password.



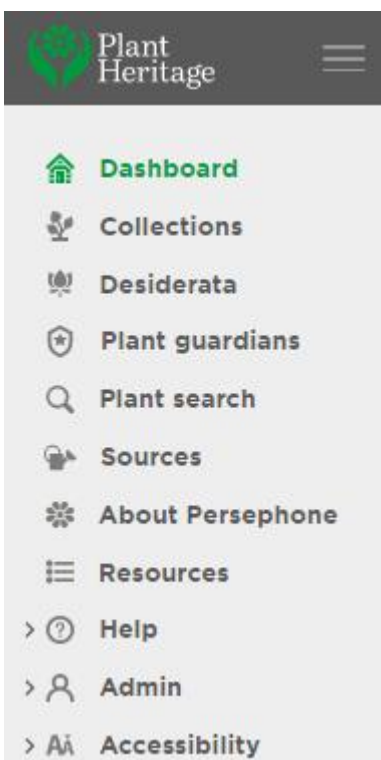
To keep your password secure, we suggest a minimum of 8 characters, including letters of both lower and upper case, numbers, and special characters such as !, ?, etc. Avoid using whole words.

Contact us at persephone@plantheritage.org.uk if you need to change the email you use for Persephone

2. Accessibility and Navigation

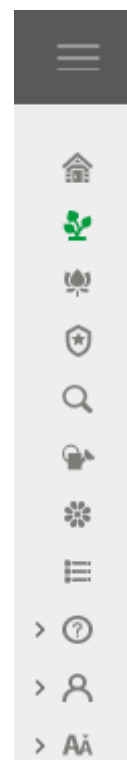
On logging in you will find yourself at the **Dashboard**. From here you can click through to your Collections, Desiderata or Plant Guardians.

- Notice the fixed menu on the left hand side of your screen. The item in **green shows you where you are on Persephone**.
- If you want to increase the size and depth of text on Persephone, click on **Accessibility** (bottom of left hand menu) and **Turn On** this feature. Persephone will remember your choice when you next login, but you can change your choice at any time.
- You can also change the size of text by pressing the CTRL key on the keyboard plus MOUSEWHEEL up or down, or CTRL - and + on a keyboard.
- If you are viewing Persephone on a mobile, you will need to click on the three bars to open the left hand menu.



When using on a PC or Mac you can hide the menu by clicking the three bars on the top right to hide.

Click again to restore



3. Keyboard shortcuts

Throughout the site there are several shortcuts you can use.

- Pressing **CTRL** and **S** at the same time will **save** your work.
- Pressing **CTRL** and **B** at the same time will take you **one step back**.
- **CTRL** and **P** from your Collection page will add a **new plant**.
- **CTRL** and **A** from the Plant page will add a **new accession**

4. Basic guide to getting started

[Watch the short video](#), or read the instructions below.

Getting to your collection

From the Dashboard, click on **collections** to see the collection(s) you have access to. Then click on the collection you want to add a plant to.

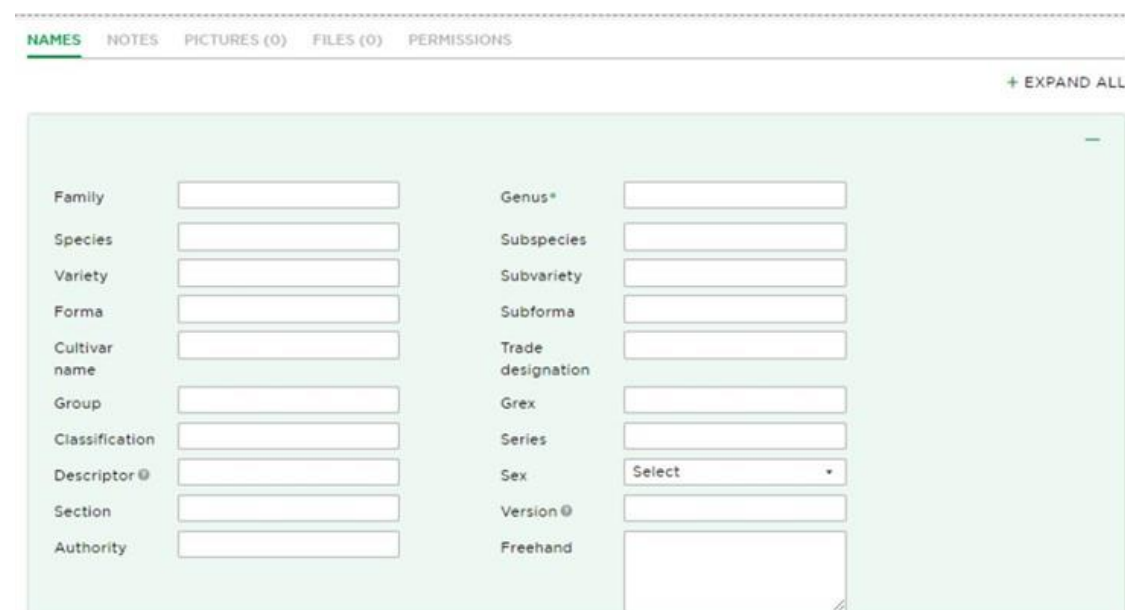
Adding a plant

To add a new plant, click on the **Action** menu at the top right-hand side of your screen and select **Add new plant**. Alternatively, you can use a keyboard shortcut by pressing **CTRL** and **P** at the same time.



A new page will now open containing all the possible fields you need to create a plant name.

Type the parts of the plant name into the correct fields. When you have finished adding the plant name, click **save** or use the shortcut **CTRL** and **S**. This will close the plant form, but you can re-open it by clicking on the + sign at the right-hand side of the plant name bar. To open all the forms on the page, click **+ Expand all**.

A screenshot of a web form for adding a new plant. At the top, there are tabs for 'NAMES', 'NOTES', 'PICTURES (0)', 'FILES (0)', and 'PERMISSIONS'. On the right side, there is a '+ EXPAND ALL' button. The form itself is a light green box containing two columns of input fields. The left column includes: Family, Species, Variety, Forma, Cultivar name, Group, Classification, Descriptor @, Section, and Authority. The right column includes: Genus*, Subspecies, Subvariety, Subforma, Trade designation, Grex, Series, Sex (with a 'Select' dropdown menu), Version @, and Freehand (a larger text area). Each field has a white input box with a light green border.

To search for the plant in the **RHS Find a Plant** or **Plants of the World Online (POWO)**, open the Horticultural Databases bar and click on **Check** next to the RHS or POWO icon respectively. Alternatively, click on the large formatted plant name at the top of the page, to run both checks simultaneously.

For a more detailed look at adding plants and checking the RHS and POWO databases, see the [Plants](#) help page.

Adding an accession

To add an accession of the plant, go to the **Action** menu at the top of the plant page and select **Add accession**, or press **CTRL** and **A** whilst on the plant page. You can also click the **Action** button or the **+** next to the accession number on the main plant list.



The accession page features a number of fields, some of which are mandatory. You will not be able to save records where mandatory fields are not completed.

Accession Number: The chief identifier for an accession and must be unique to that accession.

Date: The date the accession was created/received, format DD/MM/YYYY. If you only know the month, use MM/YYYY. If you only know the year, use YYYY. If you are uncertain of the date, check Uncertain and add any notes (such as 'pre 2001') in the 'Date Notes' field. If you don't know the date at all, click on the 'Unknown' button.

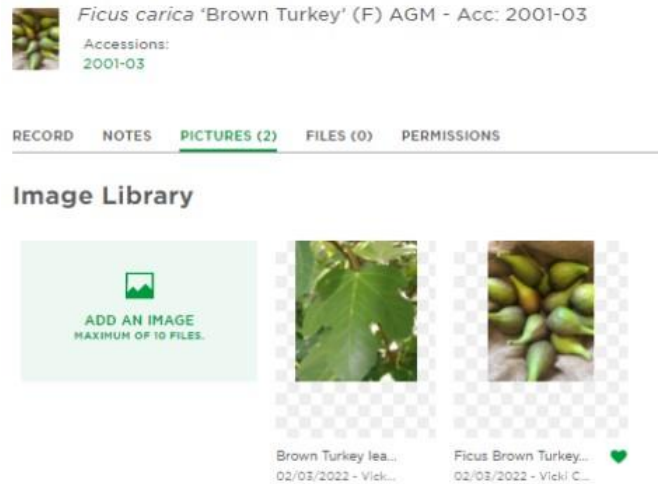
Source: Here you can either choose a previously used source, or create a new one. Use the drop down box for sources already entered. If you do not know the source, put a dash (-) or write Unknown.

Don't forget to **save**.

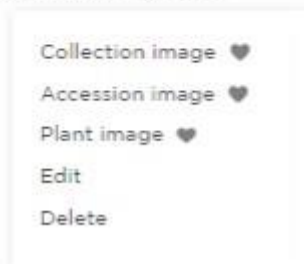
For a more detailed look at adding accessions, see the [Accessions](#) help page.

Add Pictures

You can add pictures by going to the **PICTURES** tab, either on the Plant page or the Accession page, depending on where you want to attach the picture. Once on the pictures tab, follow the on-screen instructions to upload pictures from your computer. If you are using Persephone on a mobile, you can add pictures from your phone library, or take one to upload. Files with extension jpg, png or gif are allowed, with a size of up to 10mb. You can upload as many images as you like and reorder them via drag and drop.



dahlia-little-tiger-002.jpg
03/02/2022 - Vicki Cooke



You can choose one picture to be the main image for the collection, plant, or accession by going to the three dots below the image and clicking the relevant heart icon. **Collection image** will appear at the top of your main collection list. The **plant image** will appear next to the plant on the main plant list page. **Accession image** will appear on the main page if you select 'accession view'. The **edit** button allows you to make the image private, add a description and any copyright.

For a more detailed look at adding images and files, see the [Add images and files](#) help page.

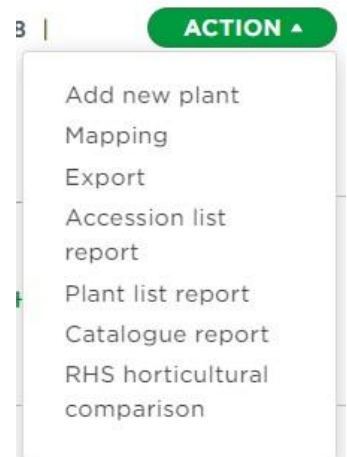
Reports

These are all accessed from the **Action** button on the collection page.

You can get an output of your data in a few different formats. Go to **Export** to get a download to an excel spreadsheet, with just the fields you choose on the export page. Standard pdf reports are available for certain, commonly used reports such as a full **accession list**, or a **plant list** of all the plants you have recorded.

A pdf **catalogue report** can also be produced, which will give an image of each plant with a short description (which you enter into the **Catalogue** field).

For a more detailed look at reports, see the [Exports, Catalogues and Reports](#) help page.



5. Collections page

From the Dashboard, click on **collections** on the left hand menu, or the COLLECTIONS button to see the Collection(s) you have access to.

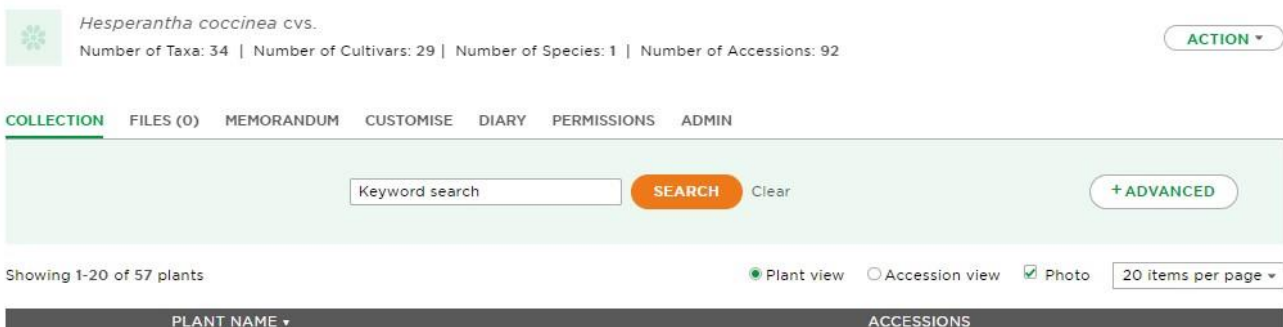


On the collections page, click on the down arrow next to the search button to switch between **All Collections**, **Your Collections** (collections that you can edit) and **Viewable Collections** (collections that you can only view)

Collections



When you click on the collection you want to view, you will go to the main plant list for that collection, with the statistics at the top of the page.



Notice the **tabs** just above the light green band on the screenshot below.

FILES gives you access to any files about the Collection

MEMORANDUM (if present) is where you can grant permission to the Plant Conservation Team and/or your local coordinator to view all or part of your collection records. **Please complete your Memorandum as soon as possible.**

CUSTOMISE is for setting up notes fields and other features to meet your needs

DIARY is for keeping a record of your work with your collection and records.

There is a **Search** function in the green band. In this search box you can search for records by plant name, synonyms or accession number. There is also an advanced search - find out more about [advanced searches here](#).

Below this, you can change how you view the plants listed on this page. **Plant view** shows the collection listed by plant, with all the accessions of that plant listed to the right. **Accession view** lists each accession individually. If you don't want to see photos, untick this option. If you want to see more than 20 items per page, select a different option from the dropdown.

6. Plants pages

From the Plant List, click on a plant name to view details about an individual plant.

This will bring you to the plant **NAMES** tab, which is where you can view the plant name, together with any synonyms and common names.

NAMES **NOTES** **PICTURES (0)** **FILES (0)**

Notice the tabs just above the horizontal black line.

NOTES will take you to notes about the plant

PICTURES and **FILES** will take you to pictures and files about the plant.

7. Add a new plant

To add a new plant, click on the **Action** button at the top right-hand side of your screen and select **Add new plant**. Alternatively, you can use the keyboard shortcut **CTRL P**.


ACTION ▾

Add new plant

A new page will now open containing all the possible fields you need to create a plant name.

Just type the parts of the plant name into the correct fields and the rest will be done for you.

Notice how, as you type, that the plant name appears at the top of your screen correctly formatted. Persephone auto-formats names and it will also auto-correct simple errors, such as using an uppercase letter, instead of a lowercase one, at the start of a species

 *Monarda didyma* BEE-PURE ('Monard0039'^{PBR}) (Bee-you Series)

NAMES **NOTES** **PICTURES (0)** **FILES (0)** **PERMISSIONS**

Family	<input type="text"/>	Genus*	<input type="text" value="Monarda"/>
Species	<input type="text" value="didyma"/>	Cultivar name	<input type="text" value="Monard0039"/>
Series	<input type="text" value="Bee-you"/>	Subspecies	<input type="text"/>
Trade designation	<input type="text" value="Bee-pure"/>	Classification	<input type="text"/>
PBR	<input checked="" type="checkbox"/>	Descriptor ⓘ	<input type="text"/>
AGM	<input type="checkbox"/>	Section	<input type="text"/>

It should be possible to format almost any plant name using the available fields, but if not, you can use the **freehand** box. In this case you can italicise any word in the plant name by placing it in between curly brackets ie. {Rosa} will format as *Rosa*.

Note: To place a species at the end of a plant name, as in *Astilbe* 'Alive and Kicking' (*chinensis*), enter (*chinensis*) in the species field.

When you have finished adding the plant name, click **save**. This will close the plant form, but you can re-open it by clicking on the + sign at the right-hand side of the plant name bar. To open all the forms on the page, click **+ Expand all**.

Note that the first name you add will be your **Displayed Plant Name** and this will be indicated by a tick in the Display checkbox at the bottom of the form. This should always be the name that, in your view, is the correct name for the plant.

To delete a plant name, click on the **Action** menu and select **Delete**.

8. Synonyms, auto-synonyms & common names

Many plant names have synonyms. These are frequently identified when using Persephone's [Plant name check](#) facility and can be added automatically.

To manually add synonyms, scroll down to the **Synonyms** section and click (**+ Name**). Complete the form as before and save the synonym.

If you later decide to use any of the recorded synonyms as your display name, simply click **Set as Display**. This will move the synonym to the display name and your original display name to a synonym.

To delete a synonym, click on **Delete** at the bottom of the Synonym form.

To add a Common Name, scroll down to the **Common Names** section and click (+ Common Name). Fill in common name and Save.

You can also add an **Auto Synonym** to your record by clicking **+ Autosynonym**: use this when you would repeatedly have to add a synonym to your records, eg. *Aster divaricatus* is a synonym for all *Eurybia divaricata*. You will first need to set up 'rules' for generating auto-synonyms and you can do this through the [CUSTOMISE tab](#).

9. Adding hybrid plant names

To create a hybrid plant name, you will first need to turn on this function in the **CUSTOMISE tab**. On Customise -> Plant Notes -> Core Fields, check **Hybrid**. See [the short video online](#) for an overview of how to create a hybrid plant name.

Start by clicking **Add a New Plant**, fill in the Genus name and Save.

Next, go to the **Plant Notes** and **Select** or **Add** the names of the parents. If you know which parent contributed the seed and which the pollen choose **Seed/Pollen**. If not, choose **Parent 1\Parent 2**.

To **Select** a plant name that is already recorded in your collection, start to type the name into the blank field and then select the correct name when it appears.

The screenshot shows the 'NOTES' tab of the Persephone interface. At the top, there are tabs for 'NAMES', 'NOTES', 'PICTURES (0)', 'FILES (0)', and 'PERMISSIONS'. Below the tabs, there are two radio buttons: 'Seed/Pollen' (which is selected) and 'Parent 1/Parent 2'. Below the radio buttons, there are two empty text input fields. To the right of each input field is a green button with a white plus sign and the text '+ ADD'.

To add a plant name that is not yet recorded in your collection, choose **Add**. Fill in the plant name and click **Not in Collection**.

Now return to the plant **NAMES** page and you will see a hybrid name checkbox.

Magnolia × soulangeana

Hybrid name

Family Genus*

Species Subspecies

Tick the **Hybrid name** checkbox and you will see the displayed names of both parents, with the hybrid name correctly formatted at the top of the page and click **save**. **Note that if you subsequently change the name of either or both of the parent plants, the hybrid name will update accordingly.**

If you have run a **Plant name check** on the names of the parent plants and you have filled up the preferred RHS or POWO names for your plant, you will also have the option of choosing the preferred RHS or POWO name to create the hybrid name. **This means that your hybrid name will always follow the RHS or POWO preferred name for the parent plants, even when that name is updated.**

10. Checking plant names

To check plant names against other plant databases, this feature will need to be turned on, using the **CUSTOMISE** tab.

To search the RHS Find a Plant or Plants of the World Online (POWO), open the **Horticultural Databases** bar and click on **Check** next to the RHS or POWO icon respectively.

Alternatively, click on the large formatted plant name at the top of the page, to run both checks simultaneously.

Note that POWO only includes plants of wild origin. There is no need to check POWO if your plant name does not include a species.

RHS Find a Plant

When you click **Check**, Persephone will search the online RHS Plant Search and return one or more results.

In the case that the RHS preferred name for the plant **exactly** matches your display name for all the **main** plant name fields, the name will appear highlighted green. If the plant has an AGM, this will be indicated with a tick.

2 result(s) for "*Cyclamen coum*"

NAME	AGM	ACCEPT
<i>Cyclamen coum</i>	✓	<input type="button" value="SELECT (AS DISPLAY)"/>
<i>Cyclamen orbiculatum</i>	✓	<input type="button" value="ADD AS SYNONYM"/>

Click on **Select (As Display)**. Persephone will then tick the RHS checkbox on the plant form (indicating that the plant names agree) and fill in the RHS Unique Plant ID, Status and the number of entries in the current online RHS Plant Finder into the RHS sub-form. If the plant has an AGM that was not included in your original display name, this will be added.

Make sure to look carefully at the result of the search. Notice whether there is any additional information in your displayed plant name (such as a Classification or Trade Series) that is not in the RHS name - you might want to check elsewhere to see whether your information is correct.

The search may also return one or more synonyms. If you wish to add these to your record, click **Select (as synonym)**. Persephone will open a new synonym form and fill in the details.

In the case that the RHS has an **exact match** for your display name but regards this name as a **synonym** of another name, the RHS preferred plant name will be highlighted blue, with your display name highlighted pink.

NAME	AGM	ACCEPT
<i>Tulbaghia simmleri</i>		<input type="checkbox"/> SELECT (AS SYNONYM) <input type="checkbox"/> SELECT (MAKE DISPLAY)
<i>Tulbaghia fragrans</i>		

You now have two options:

1. To change your display name to agree with the RHS preferred name, click on **Select (make display)**. This will replace your original display name with the RHS name, tick the RHS box, fill in the RHS unique ID number etc. and create your original display name as a synonym.

2. Alternatively, if you wish to stick with your original display name, you can add the RHS name as a synonym. Click on **Select (as synonym)**. This will open a new synonym form, add the preferred RHS name to the form and tick its RHS checkbox.

In the case that the RHS preferred name includes information that is absent from your displayed plant name (such as sex or the species in a cultivar name) the RHS preferred name will be shown against a white background, with the choice of **Select (make display)** or **Select (as synonym)**

1 result(s) for "*Aucuba 'Rozannie'*"

NAME	AGM	ACCEPT
<i>Aucuba japonica 'Rozannie' (f)</i>	✓	<input type="checkbox"/> SELECT (AS SYNONYM) <input type="checkbox"/> SELECT (MAKE DISPLAY)

To add the japonica and (f) to your displayed plant name, click **Select (make display)**. To leave your display name as it was and add the RHS preferred name as a synonym, click **Select (as synonym)**.

In the case that the RHS has a **near match** for your display name, the search may return one or more similar names, with the nearest match at the top. To move the closest RHS name to your display name, click on **Select (make display)**. Alternatively, to add it as a synonym, click on **Select (as synonym)**.

5 result(s) for "*Mentha x piperita 'Eau de Cologne'*"

NAME	AGM	ACCEPT
<i>Mentha x piperita f. citrata</i>		<input type="checkbox"/> SELECT (AS SYNONYM) <input type="checkbox"/> SELECT (MAKE DISPLAY)
<i>Mentha 'Eau de Cologne'</i>		<input type="checkbox"/> ADD AS SYNONYM
<i>Mentha x piperita 'Citrata'</i>		<input type="checkbox"/> ADD AS SYNONYM
<i>Mentha x piperita f. citrata 'Lemon'</i>		<input type="checkbox"/> ADD AS SYNONYM
<i>Mentha citrata</i>		<input type="checkbox"/> ADD AS SYNONYM

If the search returns **0 results**, this may be because your plant is not listed in the RHS Plant Search, or it could be because of a difference in spelling, or the presence/absence of apostrophes, hyphens or accents. In this case, **Go to RHS database** and search again, using fewer search terms or parts of a word. An alternative approach is to use a general search engine to search the plant name (such as Google), to see if there is an alternative spelling and then search RHS Find a Plant again.

0 results for "Amelanchier canadensis 'Majesty'"

[GO TO RHS DBASE](#)

If you find the name on the RHS database, you can then either change your name to the RHS name and re-run the checks, or you can add the RHS name as a synonym. In this case you can, if you want, complete the RHS sub-form manually - please ask the Persephone team for further guidance on how to do this.

Check Plants of the World Online (POWO)

When you click **Check**, Persephone will search POWO and return one or more results. The check will not run if the species field is empty.

Plants of
the World online

[CHECK](#)

[VIEW ON SITE](#)

1 result(s) for "Hypoxis setosa"

NAME	AUTHORITY	ACCEPT
<i>Hypoxis setosa</i>	Baker	SELECT (AS DISPLAY)

In the case that POWO has an exact match for your display name, the name will appear highlighted green. Click on **Select (as display)**. Persephone will then tick the POWO checkbox on the plant form (indicating that the plant names agree) and fill in the POWO Unique Plant ID and Status. It will also add in the Authority for your plant name.

In the case that POWO has an exact match for your display name but regards this name as a synonym of another name, the POWO preferred plant name will be highlighted blue, with your display name highlighted pink. You now have two options:

1. To change your display name to agree with POWO, click on **Select (make display)**. This will replace your original display name with the POWO name, tick the POWO box, add the authority to your plant name and create your original display name as a synonym.

2. Alternatively, if you wish to stick with your original display name, you can add the POWO name as a synonym. Click on **Select (as synonym)**. This will open a new synonym form, add the preferred POWO name to the form and tick its POWO checkbox. You can also choose to copy the authority for displayed name.

2 result(s) for "Anthemis tinctoria"

NAME	AUTHORITY	ACCEPT
<i>Cota tinctoria</i>	(L.) J.Gay	SELECT (AS SYNONYM) SELECT (MAKE DISPLAY)
<i>Anthemis tinctoria</i> L.		COPY AUTHORITY

In the case that the search returns 0 results, this may be because your plant is not listed on POWO, or it could be because of a difference in spelling. In this case, **Go to POWO database** and search again, using fewer search terms or parts of a word. An alternative approach is to use a general search engine (such as Google) to search the plant name, to see if there is an alternative spelling and then search POWO again.

0 results for 'Tulbaghia fragrans'

[GO TO POWO DBASE](#)

11. Accession page

From the main Plant List page, or a plant record, click on an accession number. This will bring you to the record tab where you can view details about the accession, such as where and when it was acquired.

RECORD **NOTES** **PICTURES (0)** **FILES (0)**

Notice the tabs just above the horizontal black line.

NOTES will take you to notes about the accession

PICTURES and **FILES** will take you to pictures and files about the accession

The **action button** on the accession page allows you to:

Add an accession: This is to add a new accession from a new source

Copy accession: This copies the current accession, which is useful if you are adding several very similar accessions, or have propagated from the original. You will need to give it a new accession number and perhaps a new accession date.

Move accession: You would move an accession if you decide that is under the wrong plant name. Pick the correct name from your existing plant list and the accession will now appear attached to this plant. Make sure to check before you move the accession that you are not going to lose any notes about the plant that it's attached to.

Delete accession: Deletes the accession and all data stored with it.



Actaea cordifolia 'Blickfang' - Acc: PG2570 ← This is the accession record you are viewing

Green = alive
Red = dead or withdrawn
Yellow = excluded
Black = seed, microprop or other

Accessions:
PG1528 | PG2570 | PG3000 | PG4000 ← The numbers going across are all propagated from each other
PG1559
PG2599
PG2890
PG2888 ← Numbers going down are unrelated accessions

The accession number of the record you are viewing is shown next to the plant name. All the accessions of a plant are listed below this. Green text denotes alive, red is dead or withdrawn, orange is for excluded accessions. Accessions held as seed or in micropropagation are in black text.

If an accession is propagated from another accession, the accession number at the top of the page will appear to the right of the original accession. Otherwise they are listed below each other.

Add new accession

To **add a new** accession of a plant, click on the **action** button on the plant or accession page, or next to the accession number on the main plant list, then select **Add accession**. Alternatively, if you are in a plant page, you can use the keyboard shortcut **CTRL** and **A** to bring up the add accession form.

The accession page features a number of fields, some of which are mandatory. You will not be able to save records where mandatory fields are not completed.

You can create and customise your own notes fields - for more info see the [customise](#) section, pg 17.

Do not forget to click on **Save** if you make any changes.

Accession Number (mandatory): The chief identifier for an accession and must be unique to that accession. You will not be able to save unless it has a unique identifier. You can [customise](#) how the number is formatted, see pg 22.

Date (mandatory): The date the accession was created/received, format DD/MM/YYYY. If you only know the month, use MM/YYYY. If you only know the year, use YYYY. If you are uncertain of the date, check Uncertain and add any notes (such as 'pre 2001') in the 'Date Notes' field. If you acquired the plant some years ago, use the earliest date that you are certain you had the plant. If you know a general date range, enter an Earliest and Latest date. If you don't know the date at all, click on the 'Unknown' button. There is a 'Date Notes' field to add any extra information.

Source (mandatory): Here you can either choose a previously used source, or create a new one. If you do not know the source, put a dash (-) or write Unknown. Try to avoid different versions of the same source or spelling errors (eg. Wisley Plant Centre, RHS Wisley, Wilsey). To add a new source, click on the **new source** button and type the source name into the field. To use an existing source, click on the **existing source** button and then start to type the source name into the field, until the correct source appears. To add information about your sources, go to **Sources** on the left hand menu or by clicking the watering can icon by the Source field.

Status: What state the accession is in (alive, dead, withdrawn, held as seed only, etc). Note that the 'Exclude' status over-rides the other categories. Use this when, and only when, you wish to exclude an accession from your Accession List - eg. if you are not sure of the name or the identity of the accession.

Other fields

These can be used if relevant to your collection. If you never use these fields and want to hide them, this can be done in the [customise](#) section (pg 21).

Acquired As: How was the accession created or what was it received as?

Name Received As: Use this field only if the accession was originally received under a different (incorrect) name. In the event of a horticultural name change, you can change this via the synonym function

Original/propagated from: If this is the original plant, pick 'This is the original'. You may have propagated this plant from another one of your accessions. In this case, select the original accession from which the new accession has been created. You must ensure that dates conform to this - an accession cannot have been created before its original accession. There are number of fields which are available only if the accession is an original.

Propagated by: This field appears if your plant has been propagated from another accession. Choose the method of propagation.

Collector Number: If the plant has been collected from the wild, it may have a collectors number, which it is important to keep a record of.

Provenance: Wild (obtained directly from the wild), Indirect Wild, or Garden (originated in cultivation).

Sex: where applicable (eg, if your plants are dioecious) record whether your accession of a species is male/female/bisexual etc. Note that this drop down box should not be used to record sex of cultivars that are specifically either male or female. This information should be recorded on the plant page, not the accession page.

Verification Status: Levels follow the International Transfer Format for Botanic Gardens.

U - It is not known if the name of the plant has been checked by an authority

0 - (Zero) The name of the plant has not been determined by any authority

1 - The name of the plant has been determined by comparison with other named plants.

2 - The name of the plant has been determined by a taxonomist or other competent person using the facility of a library and/or herbarium, or other documented living material

3 - The name of the plant has been determined by a taxonomist who is currently or has been recently involved in a revision of the family or genus

4 - The plant represents all or part of the type material on which the name was based, or the plant has been derived therefore by asexual propagation

Provenance: Wild (obtained directly from the wild), Indirect Wild, or Garden (originated in cultivation).

Latitude/Longitude and Wild Latitude/Longitude: This function can be turned on in the **CUSTOMISE** tab. You can geolocate your accessions by putting in the latitude and longitude coordinates here. Alternatively, press the green marker button and this will locate to your approximate location. You can refine the location in the mapping feature.

Customise

You can choose to hide any of the fields you don't use on the accession record page, or add a range of different notes fields to the notes page. You can choose to have the mapping facility visible or not, and set custom presets for certain fields. For more information, visit pg 17, the [customise help section](#).

Add notes, images and files

Notes

To add notes about your plant or accession, click the **NOTES** tab:

NAMES **NOTES** **PICTURES (0)** **FILES (0)**

Notes fields comprise 'core fields' and 'additional information'. In general, the notes fields available to you will have been set up for you by the Persephone Team through the **CUSTOMISE tab** after discussion with you.

The full list of core fields are:

Core fields

Out of scope ⓘ	<input checked="" type="checkbox"/>	Introducer	<input type="checkbox"/>
Catalogue entry	<input checked="" type="checkbox"/>	Year of introduction (UK/IE)	<input type="checkbox"/>
Hybrid	<input checked="" type="checkbox"/>	Not in collection ⓘ	<input checked="" type="checkbox"/>

Out of Scope: use this checkbox to indicate that a plant is **outside the scope** of your collection. For example, you may have a National Plant Collection of Hybrid Musk roses bred by Pemberton & Bentall, and a few extra hybrid musks that are outside the scope of your collection but which you would like to record in the same place. Plants marked **Out of Scope** appear in purple on your Plant List and are excluded from various reports.

Not in Collection: this checkbox is used to indicate a plant that is **within the scope** of your collection but which you don't yet have. Some of these plants may be on a list of plants that you are planning to buy; others may be genuinely hard-to-find plants, and these should also be added to the separate **Desiderata** collection (full National Collection holders only).

Hybrid: Hybrid fields are used to record the names of the parents of plants in your collection.

For example, you may wish to record that the parents of *Magnolia x soulangeana*, are *M. denudata* and *M. liliiflora*. Or keep records of the parents of plant crosses that you have made yourself.

Make sure that the **Hybrid** checkbox is ticked, via **CUSTOMISE tab** and **Plant notes**.

Then on your plant **NOTES** tab, select Parent 1 and Parent 2. If these plants aren't in your collection you will need to enter the name in the pop-up plant name form.

See more detailed info on page 8: [create a hybrid plant name](#).

Catalogue: The Catalogue field is used to record a fixed amount of text to accompany an image in a [Catalogue Report](#) - pg 26.

Year of Introduction: this field can be used to record the year that a cultivar was introduced to the UK or the Republic of Ireland. This information is useful for our Threatened Plants Programme.

Introducer: this field can be used to record the name of the person who introduced or bred a cultivar.

In addition you can add your own notes to a range of notes fields set up through the **CUSTOMISE tab**

Add images

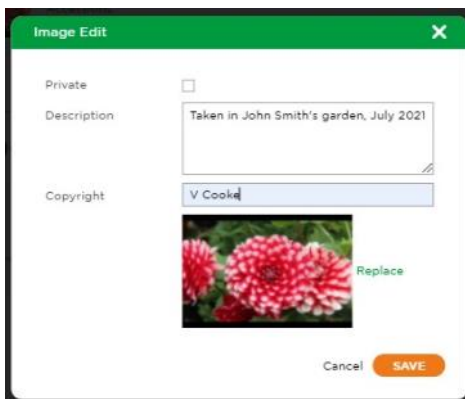
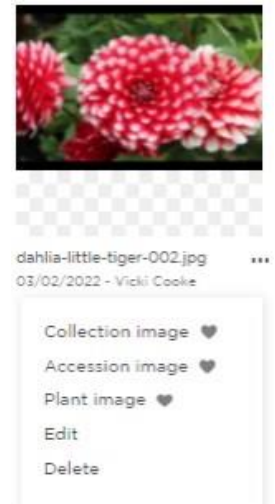
You can add images to the plant page, or the accession page, by going to the **PICTURES** tab on the relevant page.

From here you can add pictures of a particular plant, by following the on-screen instructions. If you are using Persephone on a mobile, you can add pictures from your phone library, or take one to upload.

[Watch the short video](#) to show you how to take and add pictures from your mobile phone.

Files with extension jpg, png or gif are allowed, with a size of up to 10mb. You can upload as many images as you like and reorder them via drag and drop. If your images are larger than 10mB or you prefer to use smaller images, you can compress them first. Two useful free sites for doing this are [CompressNow](#) and [Optimizilla](#).

You can choose one picture to be the main image for the collection, plant, or accession by going to the three dots below the image and clicking the relevant heart icon. **Collection image** will appear at the top of your main collection list. The **plant image** will appear next to the plant on the main plant list page. **Accession image** will appear on the main page if you select 'accession view'.



The **edit** button allows you to make the image private, add a description and any copyright.

Add files

Files can be added to the main collection page, to the plant page or the accession page. Accepted file types are jpeg, jpg, png, gif, pdf, doc, docx, xls, xlsx, ppt, pptx.

You can add up to 10 files at a time, providing that individual files don't exceed 10mB and the total doesn't exceed 40mB. You can choose to make these files private, by ticking the box when uploading, or by going to the green Action button next to the uploaded file, and selecting edit, then make private.

You can see where you have stored files by looking at the file structure to the left of the Collection Files. To view all the files, click on + Expand and click on - Collapse to close. Green folders have files stored in them, grey folders are empty.

You can organise Collection Files in folders.

To create a New Folder, right click next to the Collection Folder and then Add Folder. To edit (rename), move or delete a folder, right click next to the folder and then Move or Delete.

To upload a file to a folder click Upload File. To Replace, Move or Delete a file, click on the Action menu next to the file and then click Edit, Move or Delete and follow the instructions.

Note that you cannot edit a file within Persephone, but you can replace it with an updated version.

Customisation

One of Persephone's most powerful features is the ability to customise your records according to need. In general, your collection will have been set up by the Persephone Team, after discussion with you, when you first started.

To change or add to your collection setup, go to the **CUSTOMISE tab** at the top of your Plant List and click on one of four tabs below it:



Customise plant notes

Core fields - see guidance on Page 15 for descriptions of the core fields.

Create plant or accession notes fields

[Watch this video](#) or read the instructions below for how to set up your custom notes fields.

This is where you can choose one or more notes fields to record additional information about your plants or accessions.

You can also choose whether to make these fields visible or editable to others or to keep them **private**. You may want to keep a field private if it contains sensitive information, such as the location of a valuable plant.

It is important to think carefully about whether a note should be used for plants or accessions:

- **Plant Notes** should apply to **every accession** of your plant – eg. cultivar flower colour.
- Use **Accession Notes** where they apply to **individual accessions** of a plant eg. planting location.

The table overleaf shows a list of all the different types of notes fields and what they can be used for.

Create text boxes, text areas, date, year number and single checkboxes

To create any of the above fields, simply label your note and select the relevant option. Starting on either **Customise plant notes** or **Customise accession notes**, click on **Add new note field**. Then, label your field, select type from the dropdown and **save**.

Once created, the notes field will appear below and it can be edited, deleted or moved. Click on **Edit** to the right of the field you want to edit, and then either **edit**, **delete** or click **Up/Down** to change the order of your notes.

of

What kind of notes field do I need?

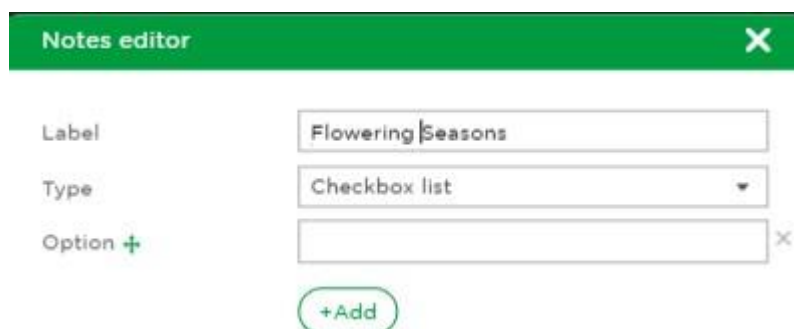
FIELD TYPE	EXAMPLE	USE FOR
Textbox	Short notes about PLANT	Small amounts of text
Date	Date of planting of ACCESSION	Calendar dates (DD/MM/YYYY)
Year	Date of registration of a CULTIVAR	Year Information
Single Checkbox	Check when an ACCESSION has been photographed	Y/N options
Checkbox List	Flowering seasons of a PLANT (eg. Spring, Spring & Summer, Winter)	More than one option can be checked
Radio Buttons	Fruit colours of a PLANT (eg. Red or Yellow or Green)	Only one option can be filled
Text Area	Cultivation Notes for a PLANT	Expandable area for large amounts of text
Dropdown	Location of an ACCESSION in various borders	One option can be picked from a dropdown of multiple options
Table	Tree height of ACCESSION by year	Information in tabular form
Number	Number of extra ACCESSIONS of a plant	Must be a number (decimal).

Create checkboxes, radio buttons and dropdowns

To create a checkbox list, radio buttons or a dropdown field, label your field and select the correct type.

Enter your first option and click **+Add**. Enter your second option and click **+Add**. Continue until you have added as many options as you need, then **save**

To delete an option, click on the X to the right of the field. To change the order of the checkboxes, use the green + to drag and drop your options into the correct order.



The screenshot shows a 'Notes editor' window with a green header and a close button (X). The form contains the following fields:

- Label:** A text input field containing 'Flowering Seasons'.
- Type:** A dropdown menu with 'Checkbox list' selected.
- Option +:** An empty text input field with a small 'x' icon to its right for deletion.
- +Add:** A green circular button with a white plus sign and the text '+Add'.

Create tables

Choose **Table** from the list of types and label the field.

Select **Normal** or **Infinite** Table. A normal table has a fixed number of rows and columns for every plant or accession. An infinite table has a fixed number of columns and you can add as many rows as you want for individual plants or accessions.

For a **normal** table, add the number of columns and rows and save.

For an **infinite** table, add just the number of columns

A picture of your table will now appear.

For a **normal** table, label the columns and rows and then click **Save table**.

Tree height (m) by year

	2016	2017	2018	2019	2020	2021
Tree height (m)						

For an **infinite** table, label just the columns

Inspections

Date	Checked By	Comments
------	------------	----------

To delete a table or change the column and/or row headings, click on **Edit** to the right of the table and choose edit or delete.

To add or delete rows or columns to a **normal** table simply adjust the number of columns and rows in the Notes Editor. *NB – new columns are added to the right of existing columns and new rows are edited below existing rows. If you are entering a sequence (such as years) make sure to put these in ascending order so you can add to them later.*

To add columns in an **infinite** table simply adjust the number in the Notes Editor. *NB – new columns are added to the right of existing columns, so if you are entering a sequence (such as years) make sure you put these in ascending order so you add to them later.* Rows are added in the actual notes field - click on the three dots to see options to add, delete, or re-order the rows.

Inspections

DATE	CHECKED BY	COMMENTS
16 Sep 2011	Dee Clift	TE Inventory Survey



Note that data held on a spreadsheet can be **imported** to a Persephone table and that all tables can be **exported**. Please ask the Persephone Admin Team for more details.

Customise plant name form

[Watch the video](#), or read the instructions below.

Settings

Check the boxes if you want to be able to compare your plant names against the **RHS Plant Search** and/or **Plants of the World Online**.

Note that POWO only records the names of wild origin plants. If your collection does not include any named species, use the RHS Plant Search only.

You can also choose whether to include **Authority**, **Section** and **Series** in your plant name (if applicable).

Live fields

To hide plant name fields that you are not using, drag them to the **Unused fields** box. Data will not be lost if you accidentally move a field, and you can return fields at any time. You cannot move **Genus** to the Unused fields.

Live fields		Unused fields
<input type="checkbox"/> Family	Genus	<input type="checkbox"/> Grex
<input type="checkbox"/> Species	<input type="checkbox"/> Subspecies	<input type="checkbox"/> Classification
<input type="checkbox"/> Variety	<input type="checkbox"/> Subvariety	

Autofill

If your collection involves only one or a few families, genera or species, you can set Persephone to autofill those fields. The Family field may have already been filled for you, if your collection is part of only one Family.

To add autofill options, click on **Create**, then **Add** to add the first option, then **Add** again to add the second option and so on, then click **Save**.

Auto synonym generation

This feature can be used to save you having to repeatedly add a former name (synonym) when you are adding new plant names **OR** to allow you to update a plant name across your collection, if the plant name is changed by taxonomic revision.

Examples:

(I) To set up an auto synonym to record that *Eurybia divaricata* used to be called *Aster divaricatus*, click **Add** and then select Genus. Put *Eurybia* in the **Current Name** and *Aster* in the **Synonym**. Then click **And &** select Species. Put *divaricata* in the **Current Name** and *divaricatus* in the **Synonym**. See Screenshot. You will be able to use this feature when you are adding new plants to your collection.

Automatic synonym generation

Name field	Genus		ACTION
Current name	Eurybia	> Synonym	Aster
Name field	Family		ACTION
Current name	Family	> Synonym	

+ AND

ADD

- Subspecies
- Variety
- Forma

(ii) To use the auto synonym function to update all *Schizostylis coccinea* records to *Hesperantha coccinea*, click **Add** and then select Genus. Put *Schizostylis* in the **Current Name** and *Hesperantha* in the **Synonym**. Then click **And &** select Species. Put *coccinea* in the **Current Name** and *coccinea* in the **Synonym**. See Screenshot.

Now click on **Action**, to the right of the rules.

Click **Replace** to change every *Schizostylis coccinea* to *Hesperantha coccinea*; Click **Add new names** to add *Schizostylis coccinea* as a synonym of every *Hesperantha coccinea* record; Click **Add new names and Set as display** to change every *Schizostylis coccinea* record to *Hesperantha coccinea*, with *Schizostylis coccinea* as a synonym.

The screenshot shows a configuration interface for name management. It features two rows of input fields. The first row is for the Genus field, with 'Schizostylis' in the 'Current name' box and 'Hesperantha' in the 'Synonym' box. The second row is for the Species field, with 'coccinea' in the 'Current name' box and 'coccinea' in the 'Synonym' box. To the right, a green 'ACTION' button has a dropdown menu open, listing four options: 'Replace names', 'Add new names', 'Add new names and set as display', and 'Remove'.

Customise accession form

[Watch the short video](#), or read the instructions below for how to customise your accession page.

The screenshot shows a horizontal navigation menu with five items: 'COLLECTION', 'FILES (2)', 'MEMORANDUM', 'CUSTOMISE', and 'DIARY'. The 'CUSTOMISE' item is highlighted with a green underline. Below this menu, there is another row of items: 'PLANT NOTES', 'PLANT NAME FORM', 'ACCESSION NOTES', and 'ACCESSION FORM'. The 'ACCESSION FORM' item is also highlighted with a green underline.

Live fields

To hide accession fields that you are not using, drag them to the **Unused Fields Box**. Data will not be lost if you accidentally move a field, and you can return fields at any time.

The screenshot shows two columns of field management boxes. The left column is titled 'Live fields' and contains three boxes: '+ Original / Propagated from', '+ Provenance', '+ Acquired as', and '+ Collector's number'. The right column is titled 'Unused fields' and contains three boxes: '+ Verification status', '+ Name received as', and '+ Accession Sex'. Each box has a green plus sign in the top-left corner.

Location

If you want to record the location of your accessions, check the boxes to make them appear on your accession record page, right at the bottom.

Use Long/Lat to record the local location of your accession (eg. in your garden).

Wild Long/Lat can be used to record the location where your accession was found in the wild.

Set qualifiers

If you use qualifiers to record accessions multiple plants of the same accession, or propagules of an earlier accession, you can configure this here.

Set qualifiers

Separator	Blank ▼
Qualifier	Blank ▼

For example, to create accession number 2020.001 * A, choose * from the options in the Separator dropdown and A-Z in the Qualifier dropdown. There are three options for Separator (. - and *) and three options for the Qualifier (A-Z, a-z and Roman Numerals).

For more information about using qualifiers see **Add Accession**

Set default values

Use the dropdown boxes to set a default value for the 'Acquired As', Status and Provenance fields. This is useful if the majority of your accessions are acquired as – say – a whole plant; or if their provenance is usually 'Garden Origin'.

Set default values

Acquired as	None ▼
Status	Alive ▼
Provenance	None ▼

You will be able to overwrite the chosen value when you complete the accession form.

Diary

The **DIARY** tab allows you to keep track of progress.

If you have multiple users in your collection, they can all add to this to keep abreast of activity. Their username will be added automatically in the 'by' column.

To add a new entry, go to the action button at the top right of the page and select **add new entry**.

In the pop-up box, add a short title and then put more detail in the report field, and save.

Once an entry has been created, you can edit or delete it by clicking on the **Action** button to the right of the entry.

COLLECTION FILES (0) MEMORANDUM CUSTOMISE **DIARY** PERMISSIONS ADMIN

Showing 1-3 of 3 entries


TITLE	DATE	BY	
Added all 2021 propagations	16/02/22	Vicki Cooke	ACTION ▼
Edited images	16/02/21	Vicki Cooke	ACTION ▼
Added field for location	16/02/20	Vicki Cooke	ACTION ▼

Mapping

You can record the location of your plant in your garden and/or the location where your plant was found in the wild.

You can do this in one of two ways. You can record the latitude & longitude of the accession, or you can manually position the accession on the map relative to other features such as trees and buildings.

Persephone stores the latitude & longitude on the accession form.

 There is a button next to the local latitude & longitude and wild latitude & longitude to geolocate. This will use the device you are using as the source of the data. If you use this on a **PC** or **Laptop**, it will be close to your location but maybe a fair distance away. If you are using a mobile **phone** or **tablet** (with geolocation ability) it should be more accurate. The accuracy of geolocation is site and equipment dependent.

Plant Heritage has purchased a **Bad Elf** GNSS surveyor which, when used in conjunction with an **Apple iPad**, can get to a 1 metre accuracy in perfect conditions. Please contact persephone@plantheritage.org.uk if you would like to find out more about using this to map your collection.

How do I get my collection mapped?

- Import Latitude & Longitude into Persephone from a .csv file
- Geolocate using the geolocation system
- Take readings from any source and enter by hand
- **Work directly on the map to position the accession relative to other reference points such as trees or buildings.**


You can switch between the local map and wild map, when the coordinates of any wild collected material is known.

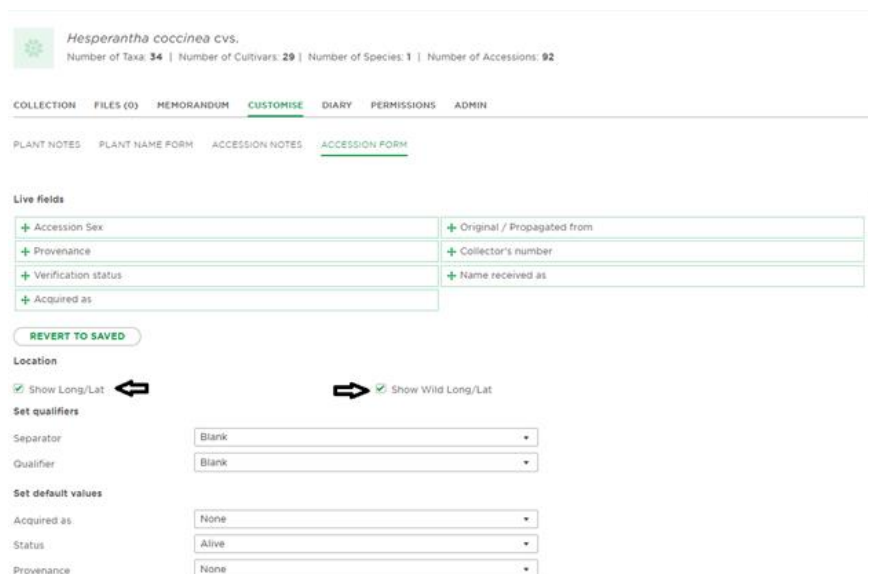
Customising the collection to use the mapping feature

From the **collection page**, go to the **CUSTOMISE** tab and choose **accession form**.

On the form you will find a checkbox **Show lat/long** for local mapping and wild mapping. Just tick the box(es) for whichever ones you want enabled.

Once you have set this up you will see the mapping fields for the latitude and longitude on the accession record form.

These can be populated from data you already have or can be entered by using the geolocation icons. 



Hesperantha coccinea cvs.
Number of Taxa: 34 | Number of Cultivars: 29 | Number of Species: 1 | Number of Accessions: 92

COLLECTION FILES (0) MEMORANDUM CUSTOMISE DIARY PERMISSIONS ADMIN



PLANT NOTES PLANT NAME FORM ACCESSION NOTES ACCESSION FORM

Live fields

+ Accession Sex	+ Original / Propagated from
+ Provenance	+ Collector's number
+ Verification status	+ Name received as
+ Acquired as	

REVERT TO SAVED

Location

Show Long/Lat   Show Wild Long/Lat

Set qualifiers

Separator:

Qualifier:

Set default values

Acquired as:

Status:

Provenance:

The next stage is to go back to the collection page and select **mapping** from the top right **Action** menu.

When you do this, you will arrive at the mapping module and if you already have the coordinates stored on the accession record you will see where those accessions are on a map. In **Google Maps** you can **zoom** in and out using the mouse wheel or clicking on the + -.

Viewing the Map

You can view in **map** or **satellite** view. The list of mapped accessions appears on the RH side of the screen. To locate an accession on the map, click on the accession name and number and the location of the map will be indicated by a green pin with a black edge. To identify a mapped accession, click on the pin and you will find the accession name and number highlighted on the right. From there you can go through to the accession record to find out more about it.

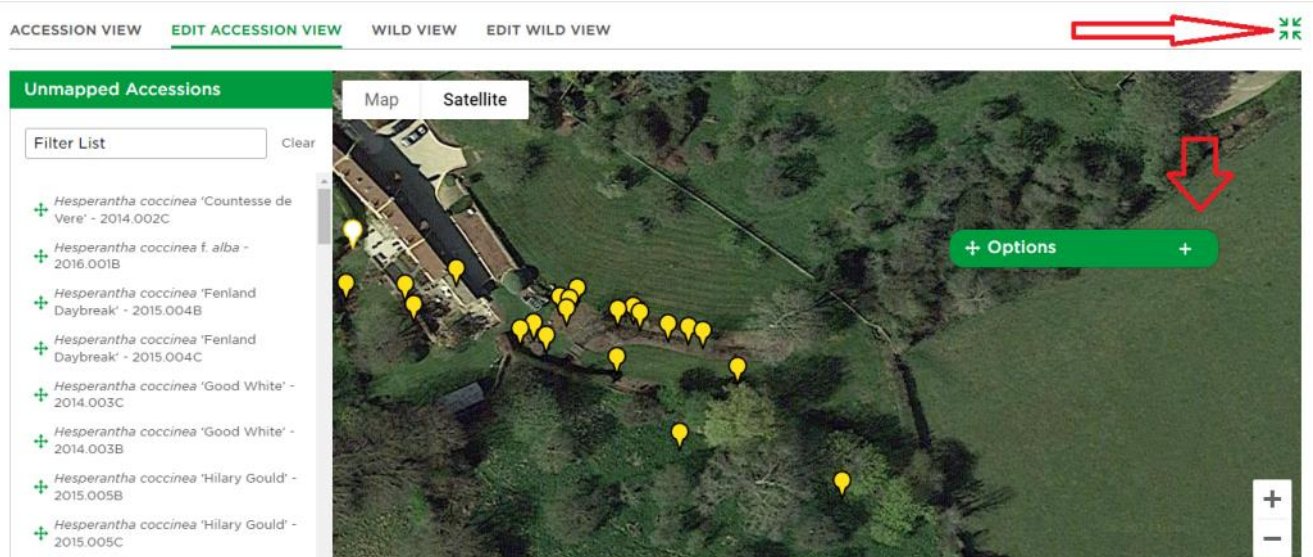
Editing the Map

To edit the map, click on **Edit Accession View** or **Edit Wild View**. We recommend that you use this feature on a tablet or PC/MAC.

- On the left you can see the unmapped accessions
- On the right you can see the mapped accessions

To maximise the size of the map on your screen, click on the **Full Screen View** icon at the top right and **Minimise the Mapped Accessions**.

Use Satellite View so that you can see trees, large shrubs or buildings that you can use as reference points.



Click on the green cross to drag any unmapped accession on to your map.

To move a pin that is already on the map, drag it to where you want it to appear. This process automatically saves the new geolocation data on your accession record.

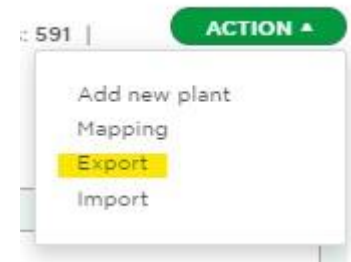
Exports, catalogues and reports

You can get an output of your data in a few different formats. Excel .csv reports will produce a spreadsheet with the fields you choose. Standard pdfs reports are available for certain, commonly used reports. A pdf catalogue can also be produced, which will give an image of each plant with a short description.

Note that all reports are based on any keyword or advanced filters you have applied.

Exporting your data to excel

Excel reports are generated by going to the **Action** button on your main plant list page and selecting **Export**.



There are three standard exports at the top of the page.

Standard will give a basic accession list containing plant name, accession number, date, source and collectors number.

Standard 2 gives a more detailed accession list. In addition to the above, the plant name is separated into individual columns for each part of the name.

Cultivar exports all cultivars within the collection.

Collections › Plant Guardians 2 › Export

Export

Saved export formats **Table export**

Standard | Standard 2 | Cultivar

Custom export

Name X Accession Notes X

Plant fields

Name Family Genus Species Subspecies Variety Subvariety Forma
Subforma Cultivar name Trade designation Group Grex Classification
Series Descriptor Plant Sex Section Version Authority Freshhand AGM

If you have tables within your data you can do a **Table export**. The names of your tables will appear here and they are exported in a table format to excel.

Custom exports can be created by clicking on any of the buttons listing your fields, whereupon they will appear in the **Custom export** box. They will appear on the spreadsheet in the order they appear in this box, and can be dragged and rearranged as required.

The **name field** compiles all the plant name fields into one column in Excel.

If this is a report you will run regularly, you can save it as a template for the future by giving it a name in the **Export name** field and saving. When you want to run this again, go to the **Load export template** button at the bottom right of the page, where you can see all your saved templates.

Remember that the excel output will be based on any keyword or advanced filters you have applied.

PDF reports

Reports are produced as standard pdfs. These can be accessed by going to the **Action** button on your main collection page.

Accession list is all the live accessions in your collection, with the date and source, arranged alphabetically. **Plant List** is a quick check of all the plants that listed in your collection records irrespective of accession status (alive, dead, excluded etc).

The **RHS Horticultural Database Comparison Report** shows Plant Names that are **not on** the RHS 'Find a Plant', Plant Names that are **similar** to names on the RHS 'Find a Plant' and plant names that are the **same** on the RHS 'Find a Plant', but only where you have added comments on the RHS sub-form of the plant page.

Remember that pdf reports will be based on any keyword or advanced filters you have applied.

Producing a PDF catalogue

The catalogue report will produce something like the image below. A thumbnail image of a plant will appear besides a short area of text.

To use this feature, you need to tick the **catalogue entry** tick box in the **plant notes** section in the **CUSTOMISE** tab.

There is a limited character count to ensure a consistent layout of the pdf.

The screenshot shows the 'CUSTOMISE' tab in the software interface. The 'PLANT NOTES' section is active, and the 'Catalogue entry' checkbox is checked. Below this, there are several other checkboxes: 'Out of scope' (checked), 'Hybrid' (unchecked), 'Introducer' (unchecked), 'Year of introduction (UK/IE)' (unchecked), and 'Not in collection' (checked). A green button labeled 'ADD NEW NOTE FIELD' is visible at the bottom of the 'CUSTOMISE' tab.

The preview of the PDF catalogue output shows three plant entries:

- Abutilon 'Orange Glow'**: The calyx is bell-shaped with five lobes. The corolla is usually bell-shaped to wheel-shaped, with five petals joined at the bases. The flowers of wild species are most often yellow or orange, but can be red or pinkish, sometimes with a darker center. The stamens are fused into a tube lined at the mouth with anthers. Inside the tube is the branching style with head-like stigmas. The fruit is a rounded or hemispherical schizocarp with up to 20 segments, each containing a few seeds.
- Acacia mucronata**: Acacia mucronata, the variable sawtooth wattle or narrow-leaved wattle, is a shrub or small tree to 5 m high. It is native to southeast Australia, mainly the states of Tasmania and Victoria (where it is widespread and common in forests and woodland, mostly south of the Great Dividing Range). It often grows as an understorey tree or shrub in eucalypt forest or as a dominant in scrubland.
- Acaena 'Bronze Beauty'**: Acaena is a genus of about 60 species of mainly evergreen, creeping herbaceous perennial plants and subshrubs in the family Rosaceae, native mainly to the Southern Hemisphere, notably New Zealand, Australia and South America, but with a few species extending into the Northern Hemisphere, north to Hawaii (*A. exigua*) and California (*A. pinnatifida*).

Sources

Every time you add a source in the accession page, it will be automatically added to your sources. These are compiled in the **sources** page, which can be found via the link in the left hand menu, or directly from the accession page if you see a watering can icon next to the source field.

You can only delete a source if it is not being used by any accession.

By clicking on a source, it will take you to a page where you can add any notes about the source, or correct any typos in the name.

In the **ACCESSIONS** tab you can see all the accession that you have got from that source and click through to the details of the plant or accession.

Aberconwy Nursery

DETAIL ACCESSIONS

Name

Aberconwy Nursery

Notes

Advanced searches and filters

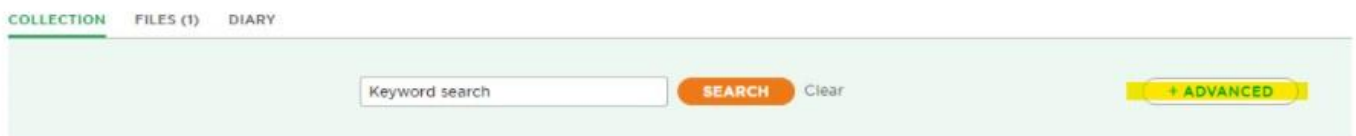
Persephone has advanced searching tools that allow you to search for almost any piece of information in your records.

You can search for information **within** a collection or **across** all the collections to which you have access.

Note that any **Reports and Exports** you do with the search on will be filtered as your search.

Advanced searches within a collection

To run an advanced search within a collection, go to your collection page and click **+ADVANCED** to the right of the Keyword Search.



You will now see the advanced search menu.



1. Select the field you want to search from the left-hand dropdown. The list will include standard plant name fields, followed by customised plant notes fields, then standard accession fields and finally the customised accession notes fields.
2. Select the condition in the middle dropdown
3. Put the search term in the right-hand dropdown.
4. Click Search

Here are some examples:

Species Is

Status Is not

Date acquired Before

Flowering Season...

- Spring
- Summer
- Autumn
- Winter

You can also use the **+OR** function to search for more than one result. For example, the following search will find *arboreum* and *decorum* species

Species OR Is

And you can use the **+AND** function to search for different terms eg.

Genus Is

Flower Colour Is not

If you regularly use a search, you can save the search name here:

Tree Height Search

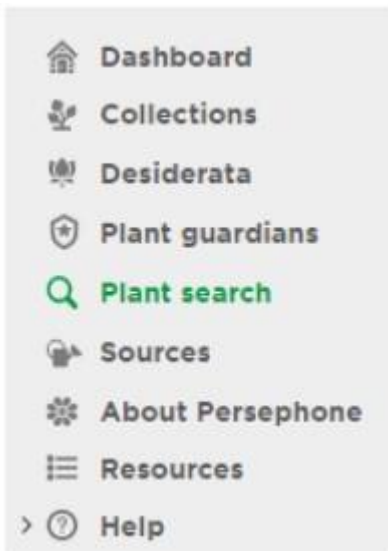
To run the saved search again, click on **Load a filter** and select the search you want to run.

Plant search: advanced searches across Collections

The ability to search across collection records is a very useful tool. For example:

- If you have a collection of *Lathyrus odoratus* (Sweet Peas) and another collection of other *Lathyrus* species, you could run a search for all the pink flowered plants in **both** collections.
- If you have several National Collections in a garden and you have recorded which beds plants are in, you could search for all the plants in any of your collections that grow in a particular bed. Note that if you want to search customised notes fields across different collections, **you must give the fields identical names**.

To run an advanced search **across** collections, click on **Plant Search** in the left hand menu. You will now see a plant list consisting of all the plants in your collections.



Click on **+ ADVANCED** to get started. You will now see the advanced search menu. Follow the instructions above for searching **within** a collection.



Data sharing

Persephone gives you direct control on who can see your data, both within Plant Heritage and with any other user you may wish to share with, or grant edit access to.

Memorandum

The memorandum is the data sharing agreement between National Plant Collection holders and Plant Heritage and can be edited by you at any time.

To edit the information in your data agreement, go to the **MEMORANDUM** tab on the main collection page. You can see when this was last edited and by whom at the top.

The basic level of data shared between National Plant Collections and the Plant Conservation team / local coordinators is your plant list (Plant Name, Accession number, Date acquired and Source) which you are required to provide as part of holding a National Plant Collection.

COLLECTION	FILES (0)	MEMORANDUM	CUSTOMISE	DIARY	PERMISSIONS	ADMIN
Last edited date		06/01/2022				
Last edited by						
Viewable plant list		<input checked="" type="checkbox"/> I understand that my Plant List (Plant Name, Accession number, Date acquired and Source, will be viewable by the Plant Conservation Team at Central Office and by my local coordinator, subject to the conditions set out on the About page .				

You can then choose to make available the rest of your data, to the Plant Conservation team and to local coordinators. If you have set fields, files or images to be private, these won't be visible to the staff and coordinators when you tick this option.

Sharing data outside of Plant Heritage

An important part of the Persephone project is to add to the quality of horticultural data. This is a two-way process. Well researched information supplied by National Collection Holders can, and often does, result in changes in the information held on other horticultural databases and vice versa. One of our aspirations is to reconcile the names of plants held on Persephone database with those on the RHS horticultural database and (where appropriate) other plant databases. As part of using Persephone, we ask Collection Holders to agree to participate in this work and for the Persephone administration team to share reports where appropriate with RHS taxonomists for the purpose of improving the quality of data held on the two databases.

Legacy of your records

The last two tick boxes allow you to set what happens to your records after you cease to hold the collection. The records collected by Collection Holders during their tenure are valuable to horticulture and plant conservation. We ask you to consider carefully what will happen to the information held in Persephone if you decide to give up your collection or are unable to continue with it.

Records can be left to Plant Heritage and may be made available to others in the future, for the benefit of horticulture and plant conservation.

If you wish to pass on your data to a family member, a fellow collector or future collection holder, or to another organisation, please put details including how to contact them in the field which appears once you tick this option.

Managing other user permissions

Persephone allows users to grant permissions to other users to view all, or part, of their records or to work collaboratively on a set of records.

Individual notes, pictures and files can be hidden from viewers if wished. Files and photos are marked via the **private** tickbox. Notes fields can be set by opening up the permissions button when adding or editing a note.

A wide range of permissions may be granted, allowing for flexible working in a variety of situations. For example:

- You may grant permission for another user to view (but not edit) all or part of your records
 - Several users may work together to record a Dispersed Plant Collection
 - Head Gardeners can assign staff or volunteers to add notes or images to existing plant or accession records, or add new records
 - Plant Guardians can add information about the plants that they hold within the Plant Guardians Collection
- Please note that users who grant permissions over their records do so at their own risk. We advise that before setting a permission for the first time that you check with the Persephone Team for full details of what each permission grants.

Collection level permissions

One user (only) per collection may grant permissions over a **collection** to other users. In general, this user will be the owner or manager of the collection. These users are assigned **Full Administrator** access by the Persephone Team.

If you have been assigned **Full Administrator** access, you will be able to grant permissions by clicking on the **PERMISSIONS** tab on your Collection Page.

COLLECTION FILES (0) MEMORANDUM CUSTOMISE DIARY **PERMISSIONS**

Then, from the **Action** button, at the top right of your screen, select **Grant permissions**

You will now see a range of permissions that you can grant to **existing** users on Persephone.

To grant a permission, first find the user by keying their name into the user field.

If they are already a Persephone user, their name will appear in the box (unless they have chosen to remain anonymous). If not, you will need to **contact the Persephone Team** to ask them to add a new user. Please provide us with their name (forename and surname) and their email address.

Then check the relevant box(es) to grant permissions and save. **You can use different combinations of permissions to achieve different levels of access.**

Permission

User: Rosemary Gardener

- Administrator
- Add plants
- Add accessions
- Viewing full
- Viewing plant records
- Viewing plant list
- Edit plants full
- Edit plants partial
- Edit accessions full
- Edit accessions partial

Cancel **SAVE**

Here is an explanation of what the various individual permission levels do:

Administrator: Allows another user to do everything that you can do, **except** grant collection level permissions to other users

Add plants: Allows another user to **add records of new plants** to your collection and edit or delete those records

Add accessions: Allows another user to **add accessions** and edit, move, copy or delete those accessions

Viewing full: Allows another user to **view (but not edit)** your full collection records, including notes, pictures and files, apart from any notes and files that you have marked private. They will be able to view any mapped accessions and will have access to your Accession List, Plant List and RHS Horticultural Database Comparison report.

Viewing plant records: Allows another user to **view (but not edit)** your full plant records, apart from any notes or files you have marked private, but not your accession records. This level of permission is particularly useful if you don't want to share information about the source or location of your accessions

Viewing plant list: Allows another user to **view (but not edit)** the list of plants and accessions in your collection, but not the detailed plant or accession records

Edit plants full: Allows another user to **edit existing plant records**. For example, they can check plant names, add photos and files and edit notes fields

Edit plants partial: Allows another user to edit existing plant records, but they will **not be able to overwrite the plant name**

Edit accessions full: Allows another user to **edit existing accession records**. For example, they can edit sources and dates, add photos and files and edit notes fields. They will be able to view and edit maps and they will have access to your Accession List and Plant List.

Edit Accessions Partial: Allows another user to edit existing accession records, but they **cannot overwrite the accession number, date, source or status**. They will be able to view and edit maps and will have access to your Accession List and Plant List.

Don't forget that you can achieve different levels of access by combining permissions! For example, Edit Accessions will allow you to edit accessions, but not view plant records. Edit Accessions plus Viewing Full will allow you to edit accessions AND view the full plant record.

Plant & Accession level permissions

If you have been assigned **Full Administrator** or **Administrator** access, you will be able to grant permissions to other users, to edit or view *individual* plant or accession records.

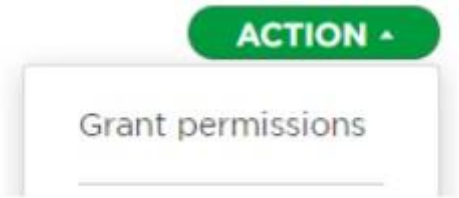
To do this, go to the plant or accession record and click on the **PERMISSIONS** tab.



Then, from the **Action** button, at the top right of your screen, select **Grant Permissions**.

You will now see a dropdown, with a range of permissions that you can grant permissions to **existing** users on Persephone.

To grant a permission, first find the user by keying their name into the user field.

A screenshot of a 'Permission' dialog box. It has a green header with a close button (X). The 'User' field contains 'Basil Hawthorne'. The 'Type' dropdown menu is set to 'Administrator'. At the bottom, there are 'Cancel' and 'SAVE' buttons.

If they already a Persephone user, their name will appear in the box (unless they have chosen to remain anonymous). If not, you will need to contact the Persephone Team to ask them to add a new user. Please provide us with their name (forename and surname) and their email address.

Then select the relevant permission and click **save**

Here is an explanation of what the various permission levels do:

Administrator plant: Allows the user to **edit** or **delete** the plant record

Edit plant full: Allows the user to **edit** the plant record, but not to delete it

Edit plant partial: Allows the user to **edit** any part of the plant record, but they cannot overwrite the name

View plant: Allows the user to **view** but not edit, the plant record

Administrator accession: Allows the user to **edit/move/copy/delete** an accession record and view and edit the location of the accession on a map.

Edit accession full: Allows the user to **edit** the accession record, but not to move, copy or delete it and view and edit the location of the accession on mapping.

Edit Accession Partial: Allows the user to **edit** the accession record, **but they cannot overwrite the accession number, date, status or source.** They will be able to view and edit the location of the accession on mapping.

View Accession: Allows the user to **view** but not edit, the accession record

Note that none of the plant or accession level permissions give access to Accession Lists or other reports.