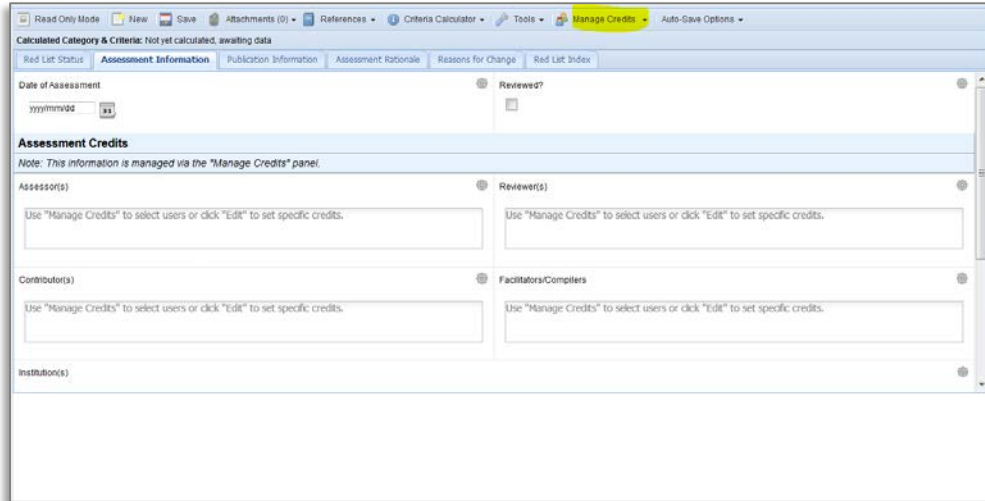# SIS: Adding new names for assessors, reviewers, etc.
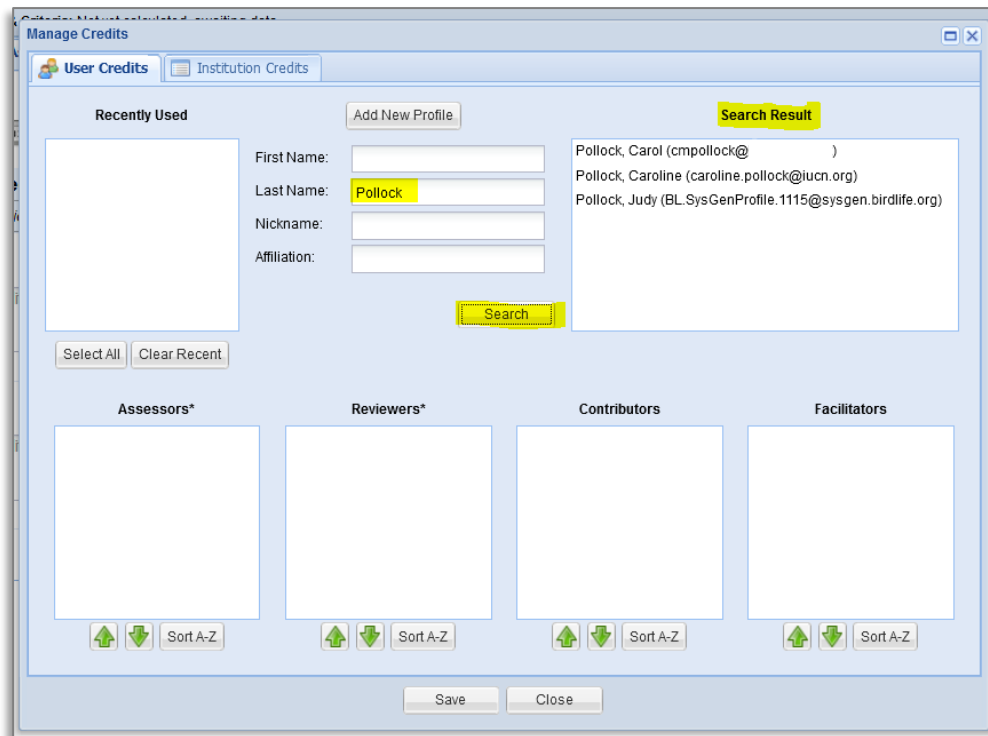
All names for assessors, reviewers, contributors and facilitators/compilers are stored in a central list in SIS.

## *Attaching names already in the list*

1. Open the draft assessment, then open the 'Manage Credits' tool:

2. In the 'Manage Credits' tool, use the search fields to find the name you would like to attach to the assessment. It is not necessary to complete all of the search fields – you can search on first name or last name or nick name or affiliation. After clicking on Search, SIS will search through the list to find the best match and will display the results in the 'Search Results' panel:

3. If the name you are looking for appears in the list, click on the name and drag it to the appropriate data field panel (Assessors, Reviewers, Contributors, or Facilitators):
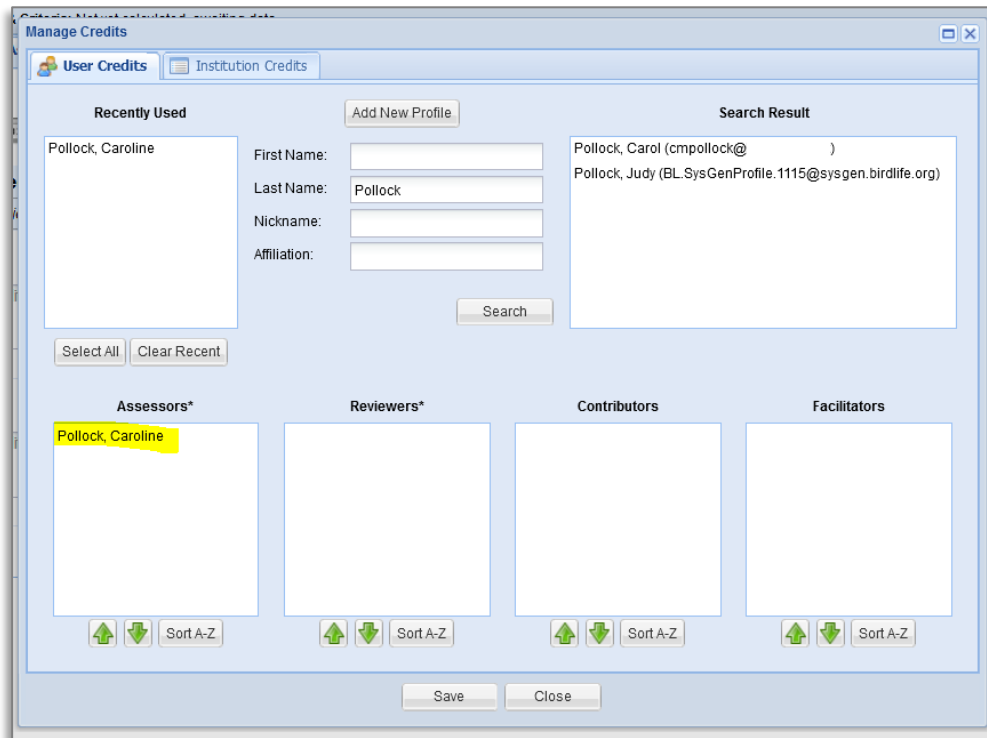
Note that each name you attach to an assessment will be stored in the 'Recently Used' panel, which allows you to select names from that list for future assessments without having to search for the names again

4. Repeat steps 2 and 3 to add more names to the assessment. When you have finished, click on 'Save' and then 'Close':
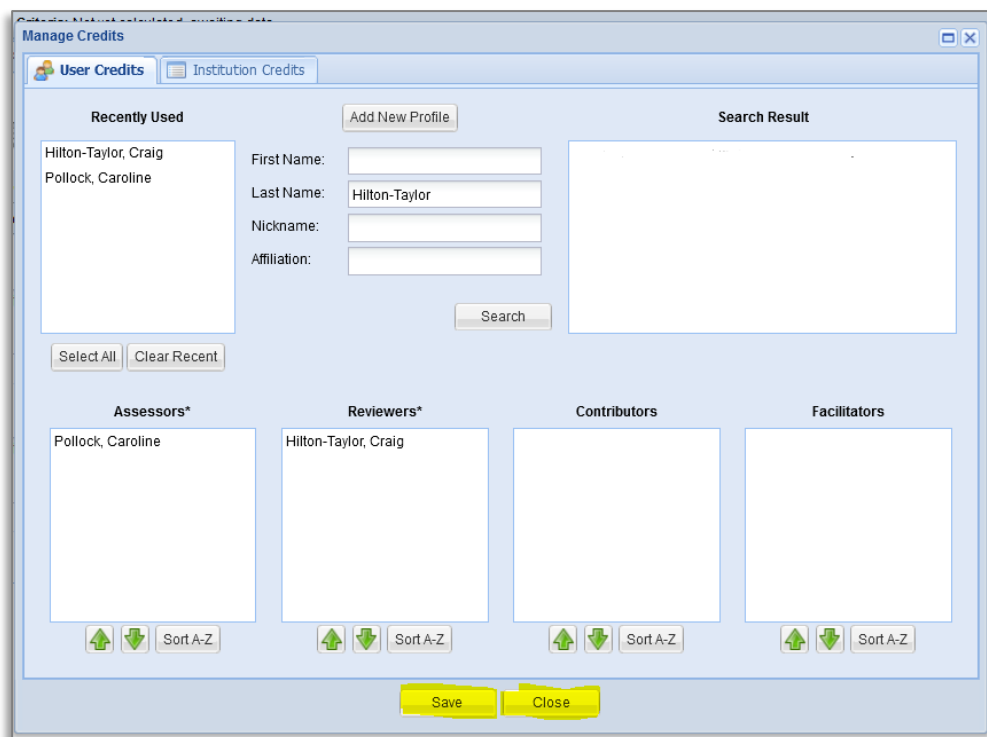
5. Click on 'Save' in the assessment page to make sure all the details entered into this page are saved before moving to another page:

Adding new names to the list

Only certain users have permission to add new names to SIS; Red List Authority Coordinators should be able to do this. If you are a RLA Coordinator and you cannot add new names to SIS, please contact the Red List Unit.

1. Open the draft assessment, then open the 'Manage Credits' tool:

2. In the 'Manage Credits' tool, use the search fields to find the name you would like to attach to the assessment. It is not necessary to complete all of the search fields – you can search on first name or last name or nick name or affiliation. After clicking on Search, SIS will search through the list to find the best match and will display the results in the 'Search Results' panel:

3. If the Search Results panel remains empty, or if the name you are looking for does not appear in the search results, this means there are no names matching your search in the SIS list. Click on 'Add New Profile'. **Note that it is important to check that the name you are looking for is not in SIS before adding the name to the system; this avoids duplicate records being created**:
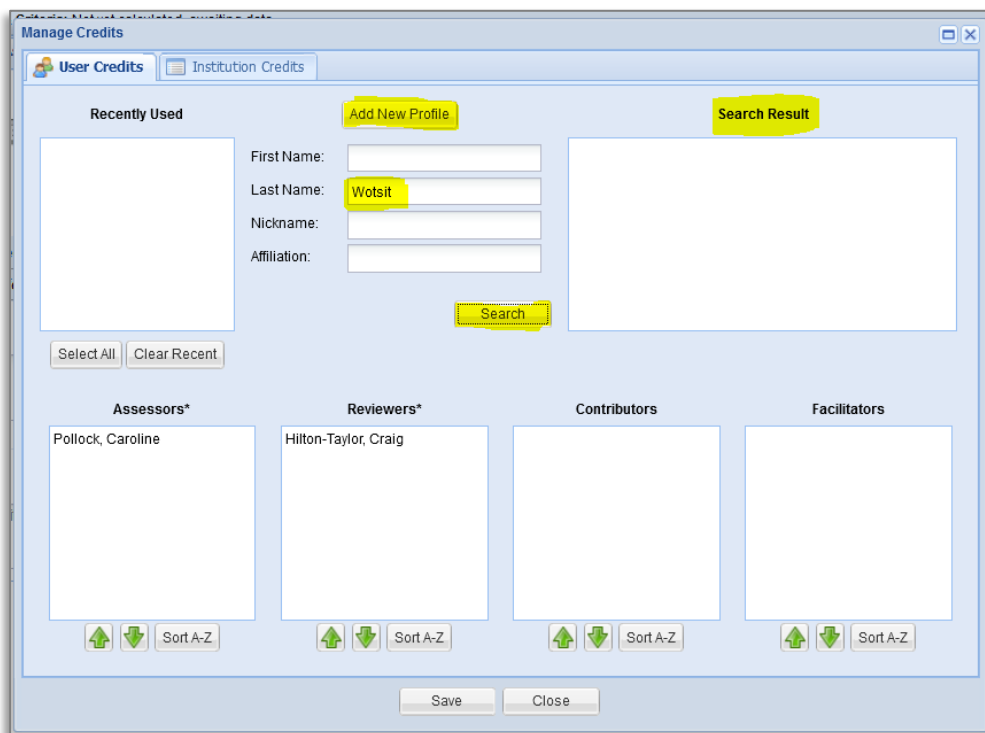
4. In the 'Basic information' panel, enter the name you want to search for again, then click on 'Submit':
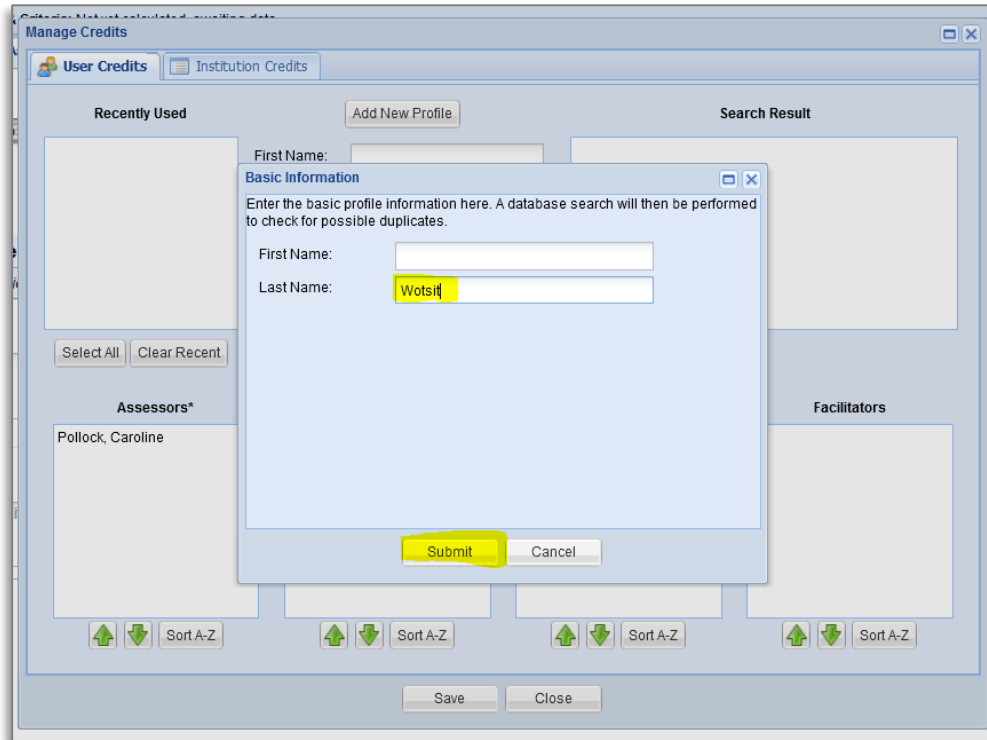
5. SIS will search the list of names again and if there are any potential matches, it will show the search results again noting that the name you are looking for might be in the list. If you still do not see the name there, click on 'Add New Profile'. The 'Add User' panel will then appear:
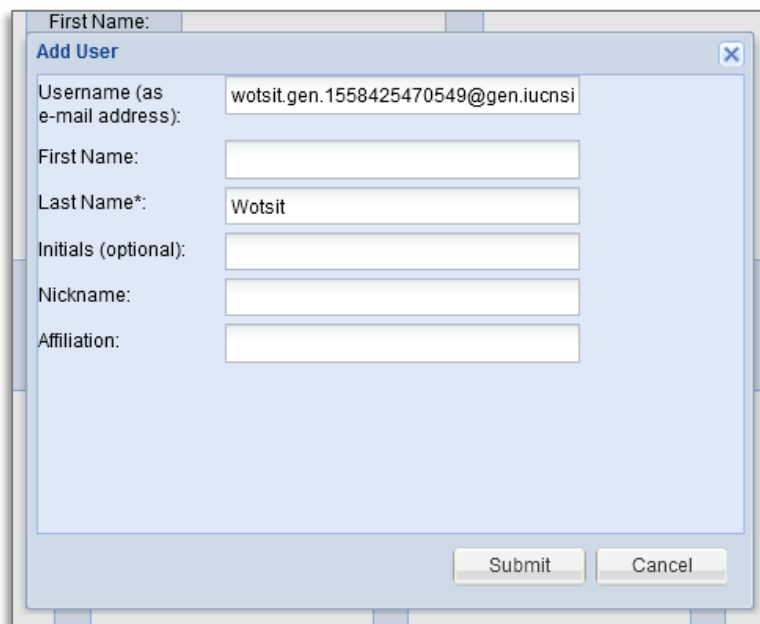
6. Note that SIS assigns a false email address for the new name. Enter the following details into the 'Add User' panel:

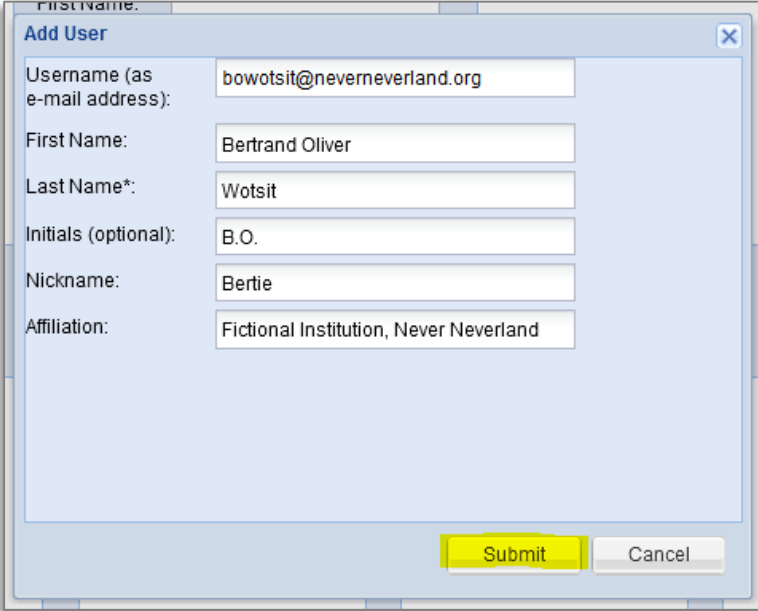- **Username (as e-mail address)**: If you know the correct email address for the person you are adding, please make sure you replace the false email with the correct address.
- **First name**: Add all first names (given names) to the First Name field.
- **Last Name**: Check that the last name (family name) is correct.
- **Initials**: Enter the initials for all **First Names** only (do not include any last name initials). Although this data field notes that this is "optional", it is important to add initials if there is more than one first name being added. If the 'Initials' field is left empty, SIS will use the first initial of the text appearing in the first name fields (e.g., for the first names "Caroline Margaret" SIS would use only the initial "C.") To show the full set of first name initials, you will need to enter these into the 'Initials' field (e.g., for "Caroline Margaret" you should enter "C.M." into the 'Initials' field).
- **Nickname**: If the person commonly uses a name other than their official name, enter this into the 'Nickname' field (e.g., if "Caroline Margaret" is more commonly known as "Carol", enter that name into the Nickname field).
- **Affiliation**: Enter the details of the organisation the person works for (or the Specialist Group, university, etc. – whichever is appropriate)

When you have completed the panel, click on 'Submit'

7. The name you have just added will now be available in the 'Manage Credits' tool for you to drag and drop into the appropriate data field (see steps 3-5 in the section ***Attaching names already on the list*** above):

Manage Credits ☐ ✕

👥 **User Credits** | 🖼 Institution Credits

Recently Used   Add New Profile   **Search Result**

                    First Name: [   ]   Wotsit, Bertrand Oliver (bowotsit@neverneverland.org)

                    Last Name: [Wotsit   ]

                    Nickname: [   ]

                    Affiliation: [   ]

                              [Search   ]

[Select All] [Clear Recent]

Assessors*   **Reviewers***   **Contributors**   **Facilitators**

Pollock, Caroline   Hilton-Taylor, Craig

⬆ ⬇ [Sort A-Z]   ⬆ ⬇ [Sort A-Z]   ⬆ ⬇ [Sort A-Z]   ⬆ ⬇ [Sort A-Z]

[Save   ] [Close   ]