

SIS Training Notes

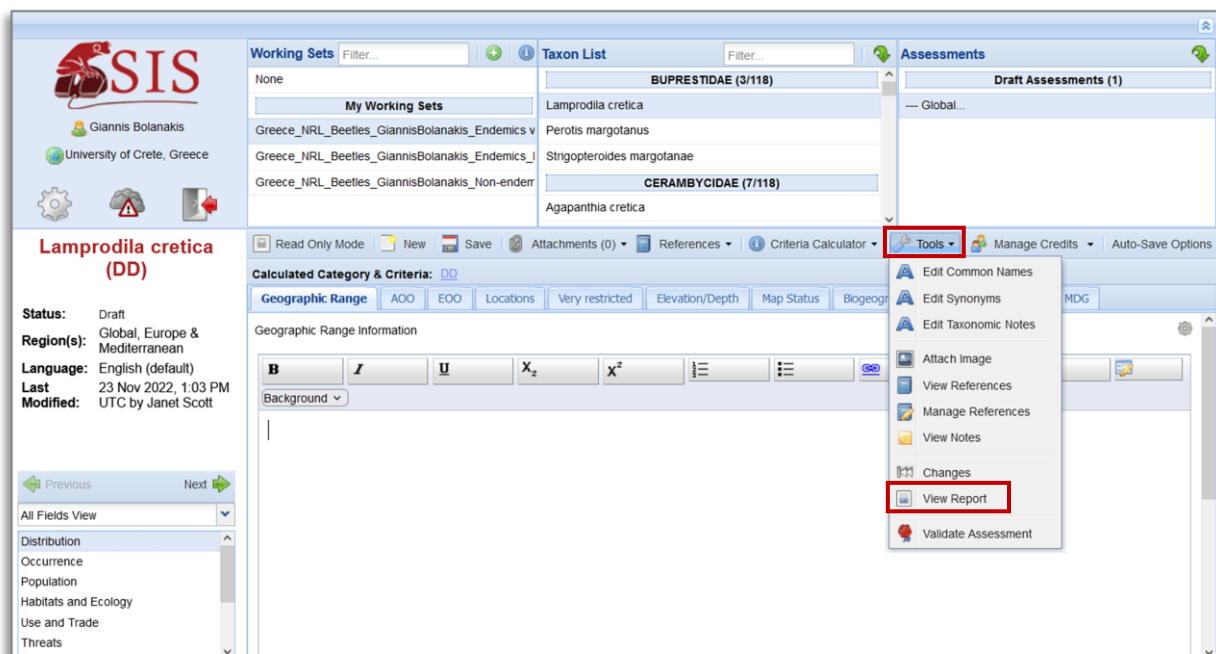
29th November 2022

EXPORTING REPORTS FROM SIS

SIS includes a range of tools to export summaries and reports for completed assessments. This may be a report of a single assessment, or a summary or report of all assessments within one working set.

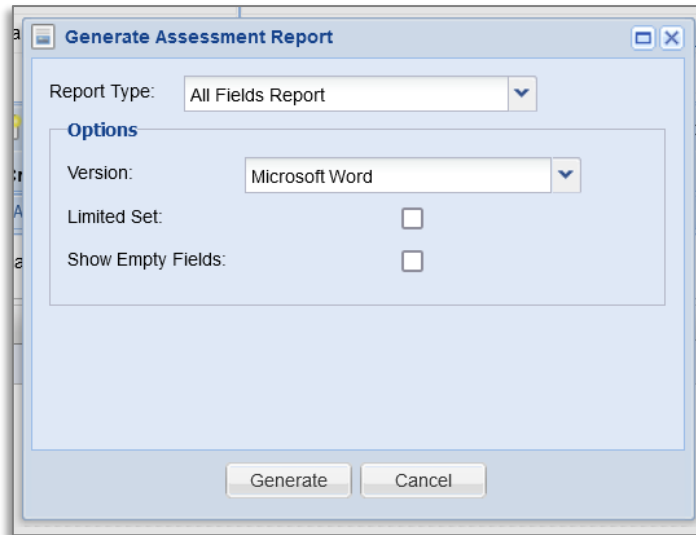
Exporting a single assessment report

- In the open assessment, select **Tools** then **View Report**.



The screenshot displays the SIS web interface for an assessment of *Lamprodila cretica* (DD). The interface is divided into several panels: 'Working Sets' on the left, 'Taxon List' in the top center, and 'Assessments' on the top right. The main content area shows the assessment details for *Lamprodila cretica*, including its status (Draft), region (Global, Europe & Mediterranean), language (English), and last modified date (23 Nov 2022, 1:03 PM). A 'Tools' menu is open, showing options such as 'Edit Common Names', 'Edit Synonyms', 'Edit Taxonomic Notes', 'Attach Image', 'View References', 'Manage References', 'View Notes', 'Changes', 'View Report', and 'Validate Assessment'. The 'View Report' option is highlighted with a red box. The 'Tools' menu is also highlighted with a red box.

- In the **Generate assessment report** panel, change the Report Type to “All Fields Report” and the Version to “Microsoft Word”.

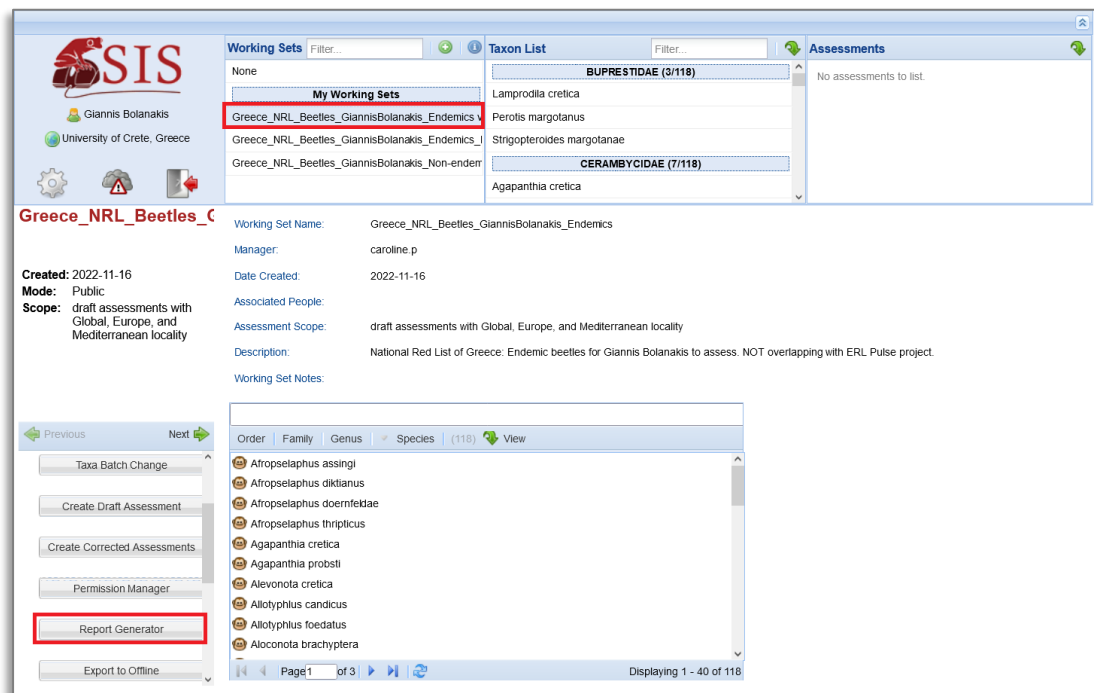


- Click on **Generate** and the report will automatically download.

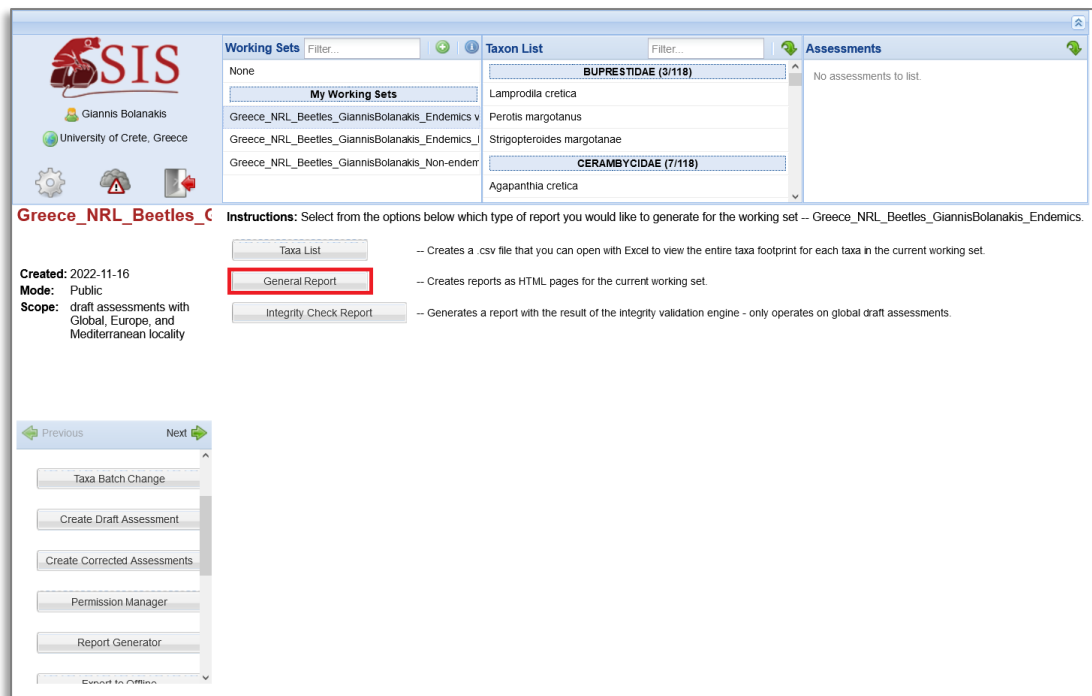
Exporting a report for all assessments in a working set

If you have been working on many assessments within a working set, you do not need to export each report individually. This can be done for the whole working set and can be downloaded as separate reports for each assessment, or as a single report containing all assessments.

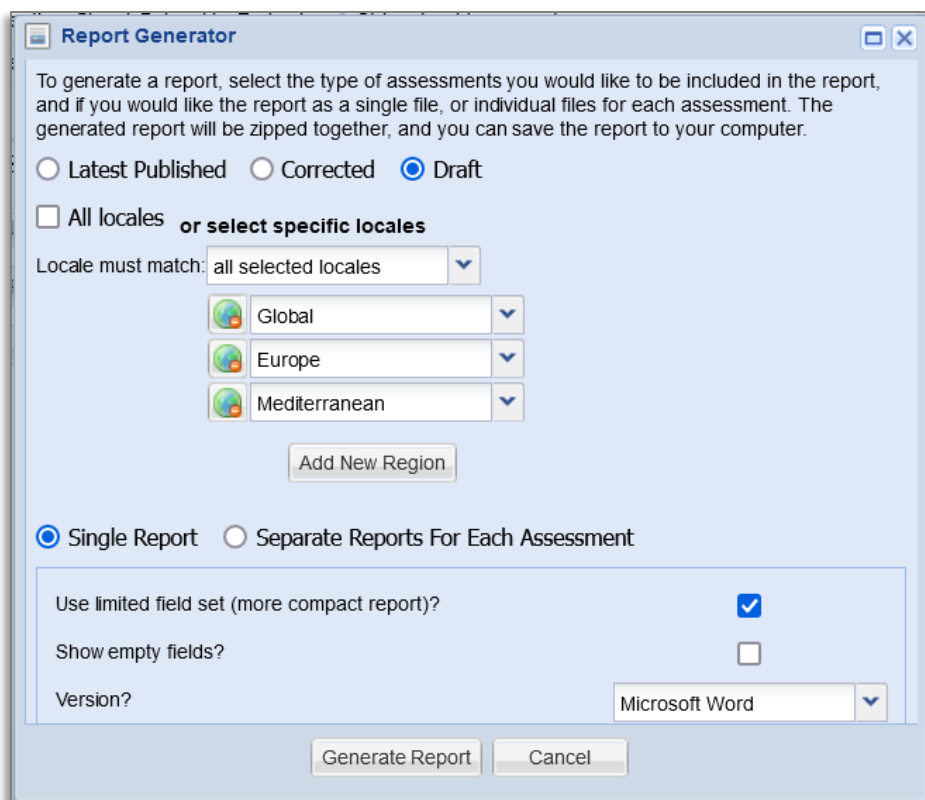
- Double-click on the name of the working set in the **Working Sets** panel at the top of the screen. Then scroll down through the options on the left and select **Report Generator**.



- Select **General Report**.



- You can tell SIS what you want the report to contain by adjusting the settings in the **Report Generator** panel. For example, if you want to download a single MS Word report for all draft assessments in the working set, use the following settings:



Note that the locale in the above example uses the region tags associated with the working set. **Do not adjust those tags**; if you do, the report will miss some assessments in the working set.

- Click on **Generate Report**. SIS will provide the report in a zip file.

Exporting a summary list of all taxa and assessments in a working set

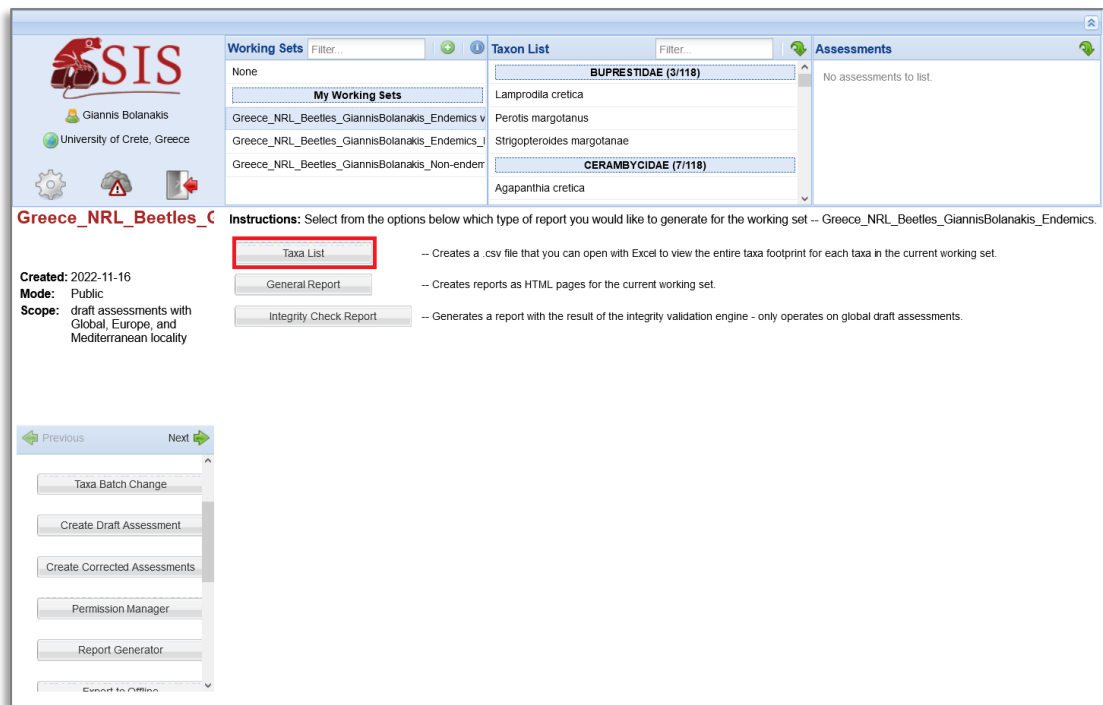
You can also export a list of taxa in the working set with the Red List category and criteria for each assessment.

- Double-click on the name of the working set in the **Working Sets** panel at the top of the screen. Then scroll down through the options on the left and select **Report Generator**.

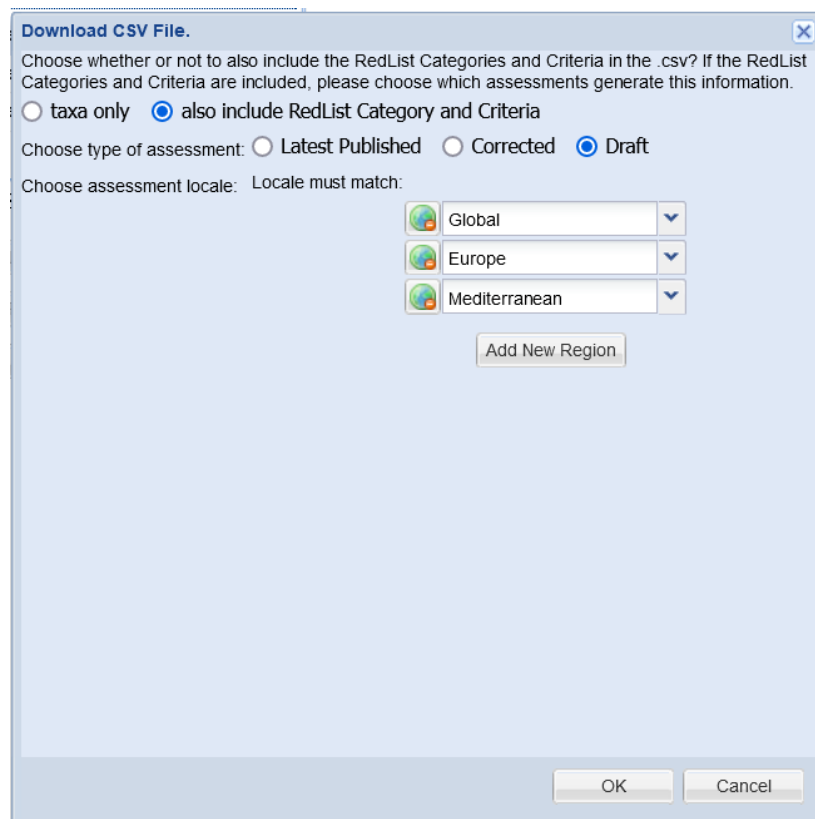
The screenshot displays the SIS interface with the following components:

- Working Sets Panel:** Lists 'My Working Sets' including 'Greece_NRL_Beetles_GiannisBolanakis_Endemics' (highlighted), 'Greece_NRL_Beetles_GiannisBolanakis_Endemics_I', and 'Greece_NRL_Beetles_GiannisBolanakis_Non-endem'.
- Taxon List Panel:** Shows 'BUPRESTIDAE (3/118)' with species like 'Lamprodila cretica', 'Perotis margotanus', and 'Stringopteroides margotanae'. Below it, 'CERAMBYCIDAE (7/118)' includes 'Agapanthia cretica'.
- Assessments Panel:** Displays 'No assessments to list.'
- Main Content Area:**
 - Working Set Name:** Greece_NRL_Beetles_GiannisBolanakis_Endemics
 - Manager:** caroline.p
 - Date Created:** 2022-11-16
 - Associated People:**
 - Assessment Scope:** draft assessments with Global, Europe, and Mediterranean locality
 - Description:** National Red List of Greece: Endemic beetles for Giannis Bolanakis to assess. NOT overlapping with ERL Pulse project.
 - Working Set Notes:**
- Left Sidebar:** Contains navigation options: 'Taxa Batch Change', 'Create Draft Assessment', 'Create Corrected Assessments', 'Permission Manager', 'Report Generator' (highlighted), and 'Export to Offline'.
- Bottom Panel:** Shows a table with columns: Order, Family, Genus, Species (118), and View. The table lists species such as 'Atropselaphus assingi', 'Atropselaphus diktianus', 'Atropselaphus doernfeldae', 'Atropselaphus thriplicus', 'Agapanthia cretica', 'Agapanthia probsti', 'Alevonota cretica', 'Allotyphus candicus', 'Allotyphus foedatus', and 'Alcoconota brachyptera'.

- Select **Taxa List**.



- Use the **Download csv File** panel to tell SIS what you want to download. For example, to download a list of all taxa in the working set with the Red List categories and criteria for each draft assessment, use the following settings:



Note that the locale in the above example uses the region tags associated with the working set. **Do not adjust those tags**; if you do, the report will miss some assessments in the working set.