


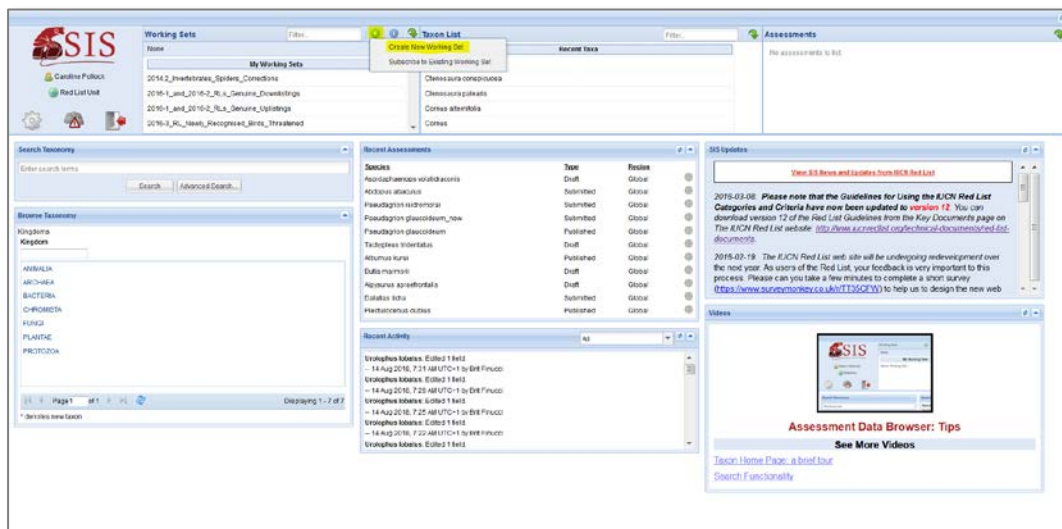
## Creating Working Sets in SIS

SIS includes a central library containing all taxa and the assessments attached to them. To allow users to work efficiently (and to control access to specific assessments), SIS allows users to create Working Sets, that contain specific taxa and their assessments to allow SIS users to quickly see and work only on those assessments that are relevant to them.

To be able to create a working set in SIS, the user must have permission to do this. Most Red List Authority Coordinators, Specialist Group Chairs, and people who are working on an assessment project for the IUCN Red List will have appropriate permissions for this. If you have one of these roles and you are unable to create a working set, please contact the IUCN Red List Unit.

The instructions below explain how to create a Working Set.

1. Click on the  icon in the Working Sets panel at the top of the screen and select Create New Working Set:



2. The 'Add New Working Set' panel will open. In this panel, give the working set and appropriate name (Working Set Name) and enter a short description of what the working set contains (Description). Then click on Save and Add Taxa:

**Add New Working Set**

Save and Add Taxa Save Save and Exit Cancel

**Working Set Name:** SUBMISSIONS\_2018-2\_Plants\_Trees of the US

Creator: caroline.p  
Date Created: 2018-08-14  
Assessment Scope:  Latest Published  Draft

All locales or select specific locales  
Locale must match: all selected locales  
Global

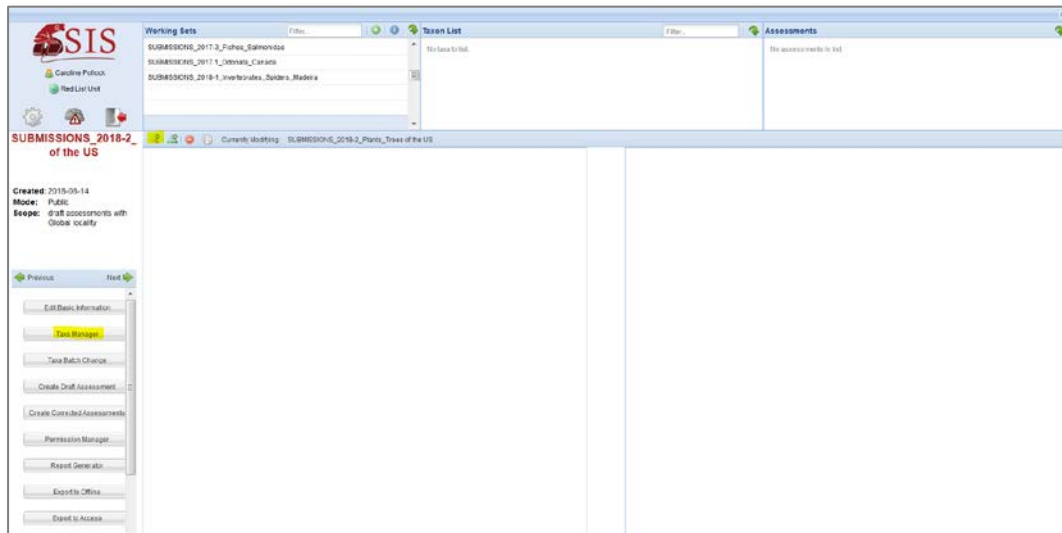
Add New Region

**Description:** North American tree assessment submissions for the 2018-2 Red List.

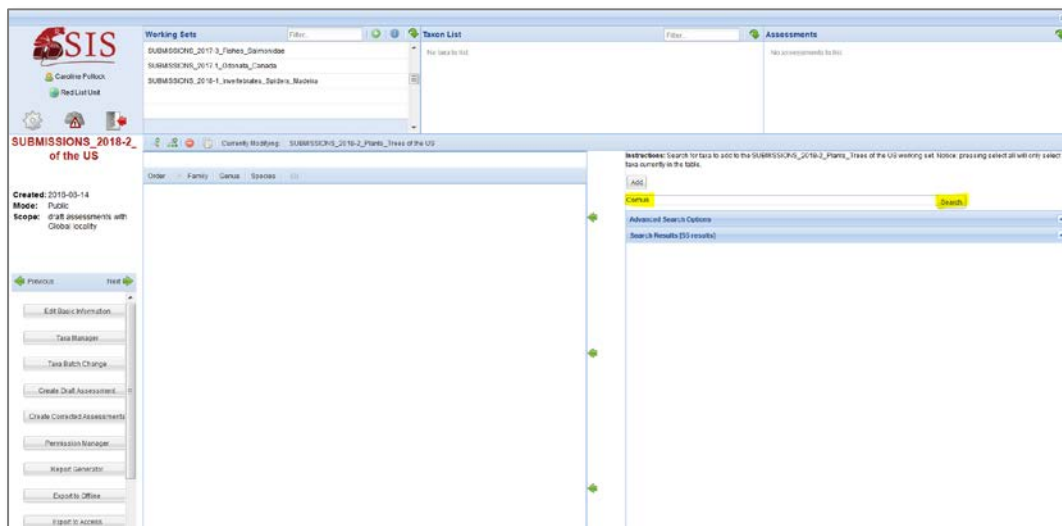
Working Set Notes:

If you are working on draft global assessments, you do not need to change the Assessment Scope from the default setting. If you are working on draft regional assessments, you will need to change the Assessment Scope (separate instructions are available on changing the Assessment Scope and how this affects working set functionality).

- The Taxa Manager section in the Working Set Manager will open up automatically. To add taxa to the working set, click on the Search For Taxa To Add icon (🔍). This allows you to enter the names of taxa to add to the working set. The other icons allow you to browse through the taxonomic hierarchy to find taxa, remove taxa from the working set, or copy or move taxa from one working set to another.

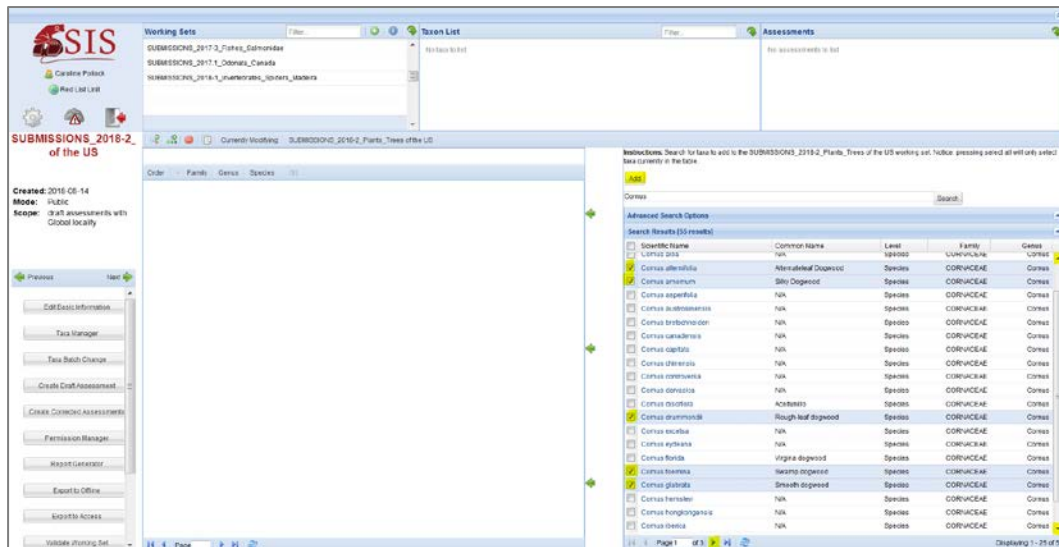


- Use the text box to type in the name of a taxon you want to add to the working set. If you are adding several taxa from one genus, you can just type in the genus name. Then click on Search:

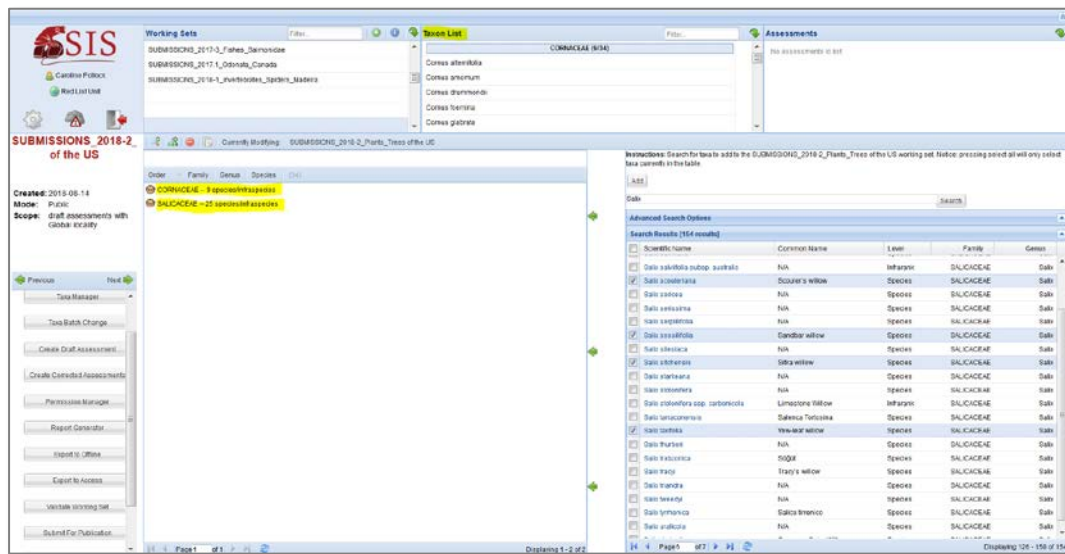


- Use the check boxes to select the taxa you want, then click on Add to add these to the working set. Note that the search results display only 25 taxa per page. You should select taxa from the first page of the Search Results panel, then click on Add before moving on to

the next page of Search Results to select more taxa. Use the scroll bar at the side and the Next Page arrow at the bottom of the panel to navigate through the Search Results:



- You will see the list of taxa that you have added to the Working Set appearing in the left hand panel of the Taxa Manager page, and also in the Taxon List panel at the top of the screen:



- Once you have added all the taxa you want to the Working Set, you can use the other functions in the Working Set Manager page. For example, if you need to create new draft assessments for all taxa in the working set to start editing these, select “Create Draft Assessment” and follow the instructions (note that if there are previous published assessments in place for any taxa in the working set, the new draft assessment should be based on the previous published assessment). Or if the taxa already have completed draft assessments and you want to submit these for publication on the Red List, select Submit For Publication:

The screenshot shows the SSIS interface with the following components:

- Working Sets:** Lists several submission sets including SUBMISSIONS\_2019-2\_fishes\_barronidae, SUBMISSIONS\_2017-1\_Ostracods\_Canada, and SUBMISSIONS\_2018-1\_invertebrates\_taxon\_lists.
- Taxon List:** Filtered to 'CORNICAE (934)', showing a list of species under the family SALICACEAE.
- Assessments:** Shows 'NO ASSESSMENTS IN SET'.
- Left Sidebar:**
  - Logo: SUBMISSIONS 2018-2 of the US
  - Created: 2018-05-14
  - Access: Public
  - Scope: draft assessments with Global priority
  - Navigation: Previous, Next, Taxa Manager, Taxa Batch Change, Create Draft Assessments, Create Curated Assessments, Permissions Manager, Report Generator, Export to Office, Export to Access, Upload Working Set, Upload For Publication.
- Main Content Area:**
  - Order: Family, Genus, Species, Date
  - Filter: CORNICAE - 8 species/infraspecies, SALICACEAE - 25 species/infraspecies
  - Table with columns: Scientific Name, Common Name, Level, Family, Genus.
  - Table with 25 rows of species data, including Salix alba, Salix caprea, Salix glauca, etc.
  - Advanced Search Options and Search Results (154 results) section.
- Bottom:** Page 1 of 1, Displaying 1-2 of 25, Page 1 of 1, Displaying 126 - 156 of 154.

Separate instructions are available for using each of the options in the Taxa Manager page.