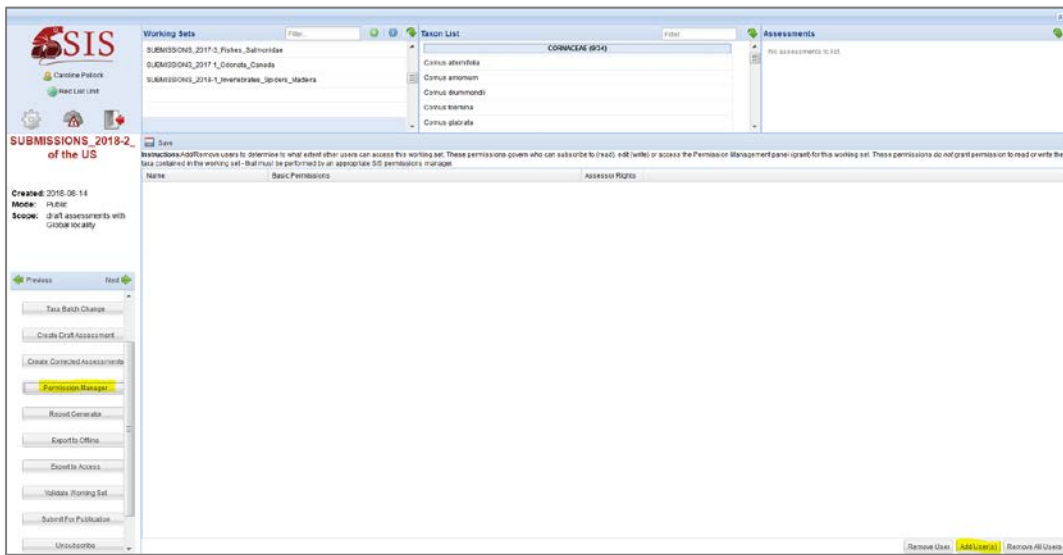


Giving other SIS users access to a Working Set

SIS uses a system of Working Sets to allow project managers to give other SIS permissions to access a working set containing only those tax and draft assessments they need to work on. The instructions below explain how to allocate permissions to a working set.

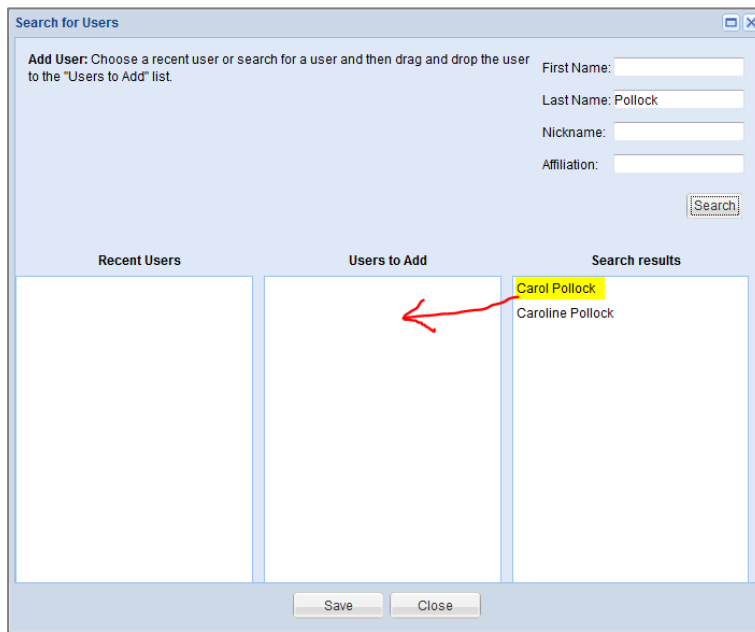
1. After creating an appropriate Working Set, containing only those tax and draft assessments you want to give someone access to, open the Working Set Manager page and select the option Permissions Manager from the list of tools on the left hand side. In the Permissions Manager, click on Add User(s) (in the bottom right corner):



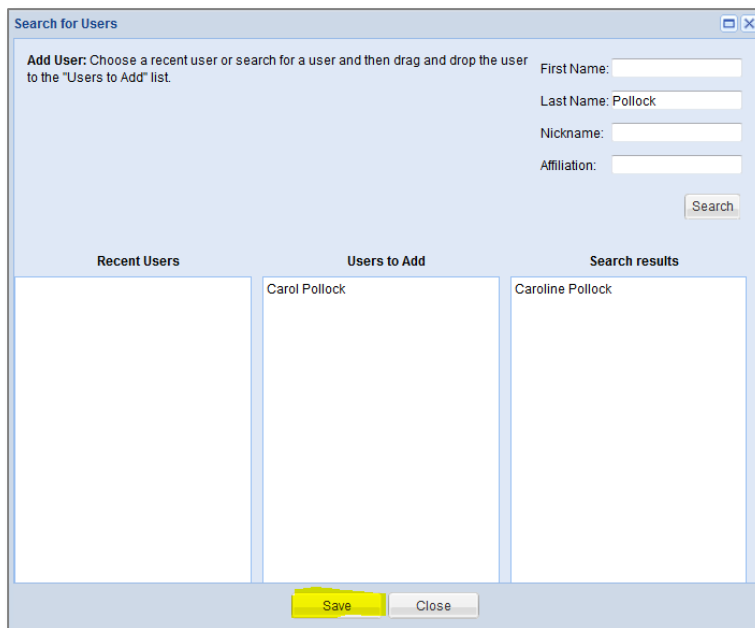
2. In the Search for Users panel, use the text boxes to type in the name of the person you want to give access to the Working Set. It is not necessary to complete all search fields; often it is enough to only complete the first or last name field. Then click on Search:

The screenshot shows the 'Search for Users' dialog box. It contains a section for 'Add User' with instructions: 'Choose a recent user or search for a user and then drag and drop the user to the "Users to Add" list.' Below this are four text input fields: 'First Name:', 'Last Name: Pollock', 'Nickname:', and 'Affiliation:'. A yellow 'Search' button is located to the right of the 'Affiliation' field. At the bottom of the dialog, there are three columns: 'Recent Users', 'Users to Add', and 'Search results', each with a corresponding empty list area. At the very bottom, there are 'Save' and 'Close' buttons.

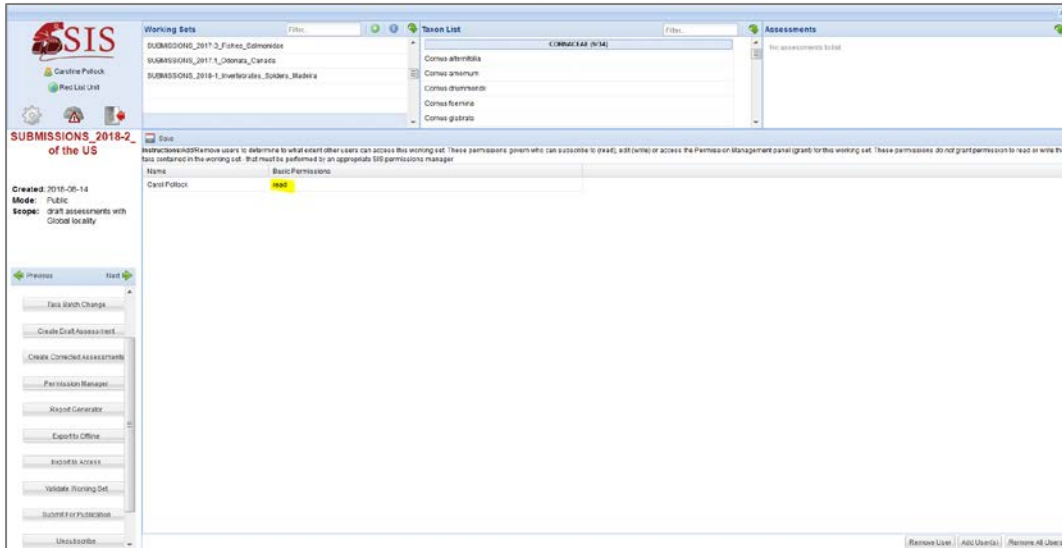
- Find the name of the person in the Search results page, click on the name, and drag it across to the Users to Add panel:



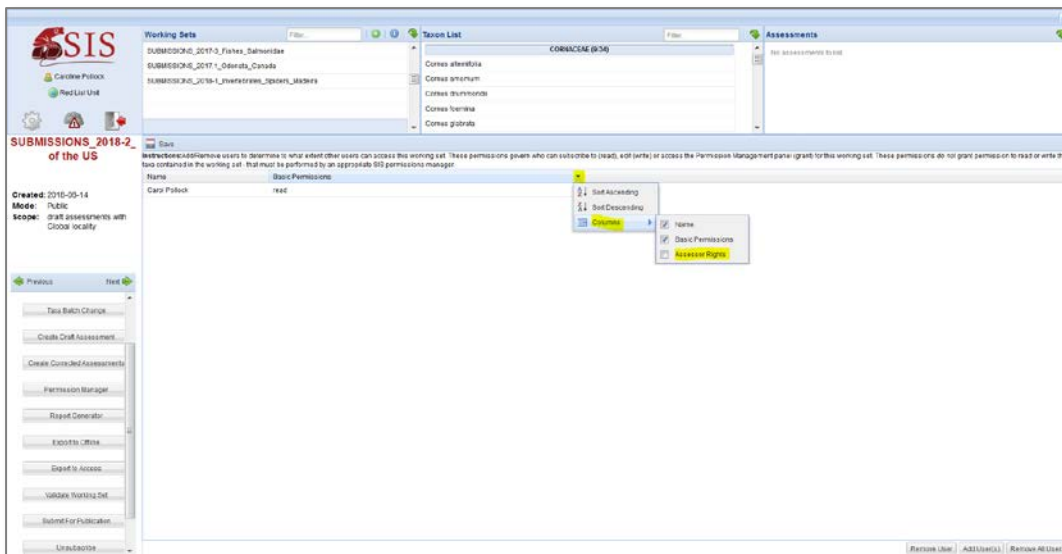
- If you want to add more than one person to the Working Set, repeat steps 2 and 3. When you have the full list of people in the Users to Add panel, select Save:



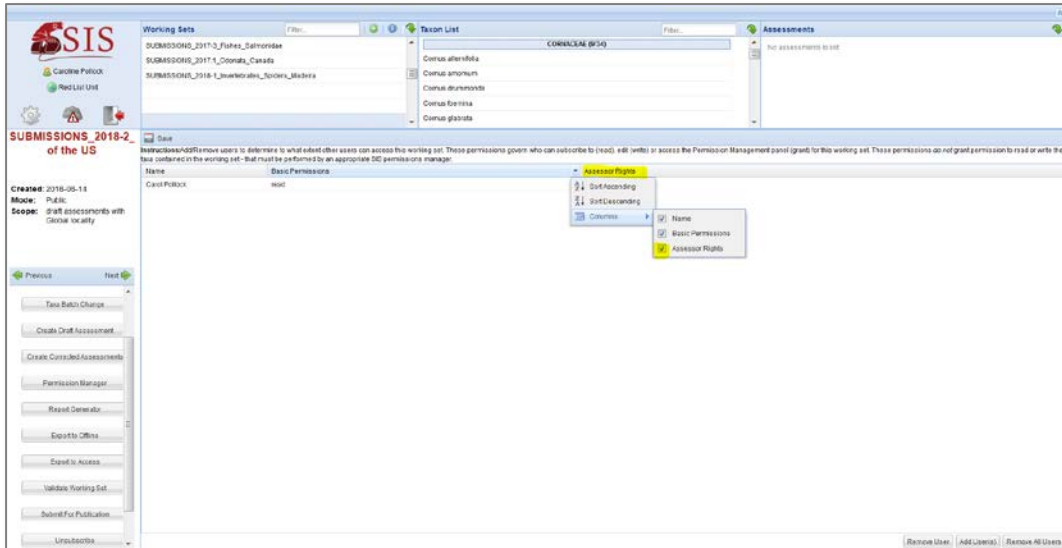
- SIS will show you the full list of people you have now attached to the Working Set. The system will automatically assign "Read" permissions to each person; this means that they have permission to look at the working set, but not to edit any draft assessments:



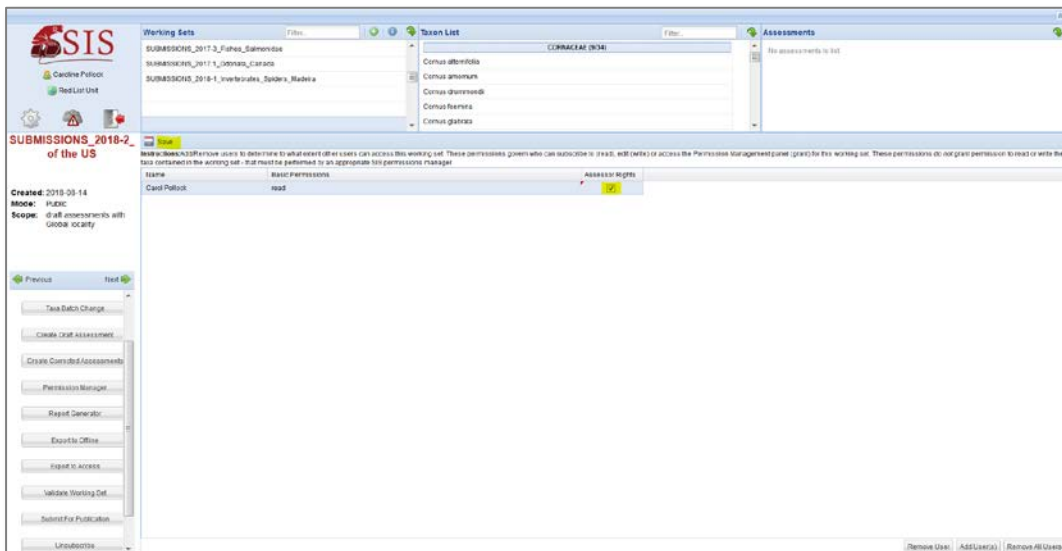
- To allow people to edit draft assessments in the Working Set, you need to give them Assessor Rights. However, SIS does not automatically display the Assessor Rights checkbox. To see this checkbox, hover your cursor over the title bar in the Permissions Manager panel, click on the down arrow that will appear, and select Columns. You will see that the options “Name”, and “Basic Permissions” are checked, but the Assessor Rights option is not checked:



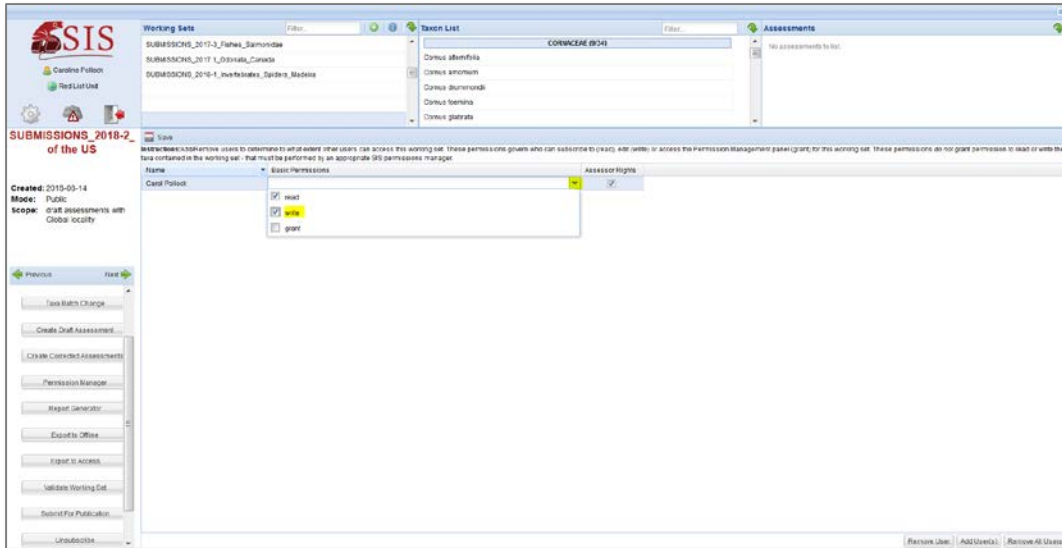
- When you check the Assessor Rights box, the Assessor Rights column will appear in the Permissions Manager panel:



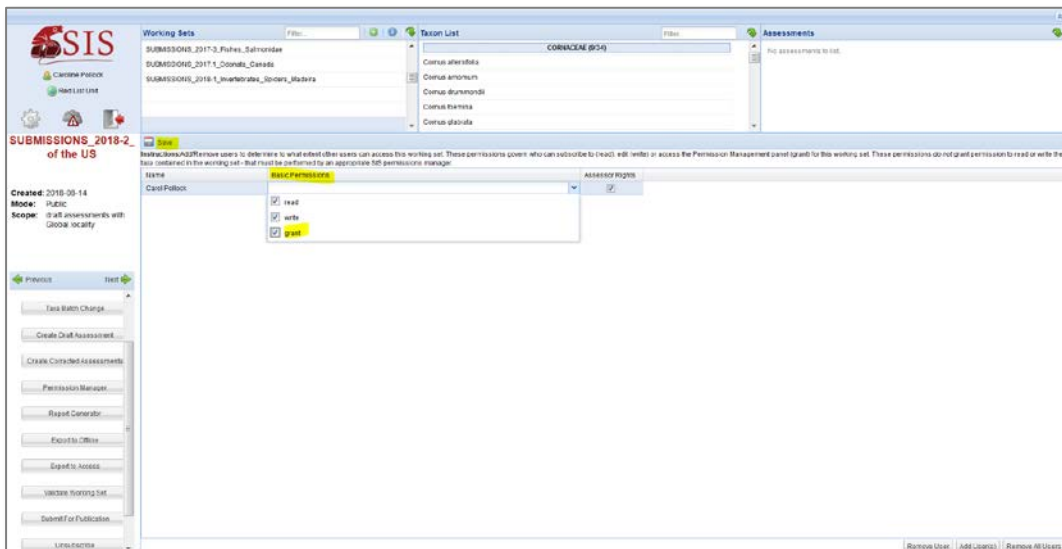
- You can now click in the checkbox in the Assessor Rights column to give the person permission to edit draft assessments for taxa in the Working Set. Remember to click on Save to save your changes:



- This is all you need to do to give people permission to edit draft assessments.** If you want to allow another person to edit the content of a working set (e.g., to add taxa to or remove taxa from the Working Set), you need to give them Write permissions. To do this, click in the Basic Permissions field and use the down arrow to see the list of options. Click in the Write checkbox:



10. If you want to give another person permission to grant other SIS users access to the working set and assign permissions for them to edit draft assessments, repeat step 9 and select Grant:



11. When you are happy with the edits you have made to the Permission manager page, remember to click on Save before moving away from this section.