Agenda Item 13.1  National Reporting

Introduction to the Online Reporting System (Training Session)

Document 13.1  Quick Guide for the ASCOBANS Online Reporting System

Action Requested

- Take note

Submitted by  Secretariat
Secretariat’s Note

The 7th Meeting of the Parties to ASCOBANS in October 2012 endorsed the proposal to use online reporting with immediate effect, initially using an online adaptation of the existing format for the Annual National Reports.

The Secretariat accordingly prepared the system and gathered the 2012 National Reports via the online system. Most users’ feedback was positive; however, some had difficulty understanding some of the features, and how to handle the different user roles the system offers.

In order to support Parties in the preparation of future reports, the Secretariat has therefore prepared this step-by-step guidance on using the most important features of the Online Reporting System.
Quick Guide for the ASCOBANS Online Reporting System
(http://cms-family-ors.unep-wcmc.org/)

This guide summarizes the key points to be aware of in order to use the system as intended.

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User Dashboard

After log-in, users are taken to their dashboards (Figure 1), which give users access to the questionnaires (reporting forms) they have been assigned. For users that are National Coordinator (Focal Point) for several CMS Family instruments using the system, all questionnaires will be accessible from here. You can return to your User Dashboard from anywhere in the system by clicking on the title line CMS Family Online Reporting System.

Figure 1 – User Dashboard

In the example above, only the ASCOBANS National Report has been assigned to the user. Since the reporting cycle for the 2012 report is over, users cannot access this questionnaire anymore. However, they can download PDFs with the responses that were submitted. Active questionnaires are linked in the dashboard and the status is set as Underway, as shown.
Filling in the Questionnaire

When clicking on the reporting form to be completed, the user is taken to the questionnaire start page, as shown in Figure 2. All sections of the questionnaire can be accessed through the menu on the left.

The symbols in the menu indicate to which degree the section has been completed, with the yellow star indicating a new section without any answers, the orange triangle indicating that mandatory questions in this section have not yet been filled, the green circle indicating that not all questions have so far been answered, but none of them are mandatory, and the green square confirming that all questions in this section were answered.

For Parties that have already participated in the previous reporting cycle, all sections will be pre-filled with the answers they gave the year before. Parties only need to update the sections by removing outdated information and providing updates.
In order to fill in the sections of the questionnaire, simply type or copy your information into the boxes provided. These will automatically expand to accommodate your answer. On the right, you have the option to insert a web link, e.g. to the reports or documents this answer is based on or refers to, or upload files that are relevant to the answer (see Figure 3).

The system will automatically save content at regular intervals. Before moving to another section, please nevertheless save the input you have made.

**Figure 3 – Filling in Sections**
User Roles: Respondents and Delegates

Respondents

The National Report is an official document and its submission needs to stay the responsibility of the person appointed officially as the focal point for the instrument in question. Therefore, only the National Coordinators can be account holders for each Party. This function cannot be delegated and the log-in details of the National Coordinators, who have been assigned the user role Respondent, should not be shared with anyone else.

Only the Respondent can submit the National Report to the Secretariat, and there can be only one Respondent per Party.

However, this does not require the National Coordinator to fill in the reporting form single-handedly. The system allows for all or parts of the questionnaire to be assigned to Delegates. For details how to delegate, please see the next chapter.

Delegates

The user role Delegate enables Respondents to gather input from others in order to complete the national reporting form. There are no restrictions as to how many Delegates a Respondent can appoint, or how many sections of the questionnaire are delegated.

Delegates can fully edit all sections that have been assigned to them. Sections that have not been assigned to them are visible to them, but they will not be able to amend the information contained there.

Delegates cannot submit the questionnaire to the Secretariat, but can only assist the Respondent in completing the information.
Delegating (Sections of) the Questionnaire

Step 1: Creating Delegate Accounts

First, the National Coordinator needs to define which users he/she would like to add as Delegates. This is done by clicking on the Delegation dashboard button on the top menu bar in the User Dashboard (see Figure 4).

Figure 4 - Accessing the Delegation Dashboard

Next, click on Add delegate (see Figure 5).

Figure 5 - Adding a Delegate
You need only the **email address and name** of the person you wish to add as Delegate. You can also choose in which UN language the person prefers to see the explanatory notes. Users can also change those settings later.

You can repeat the process for any further Delegates.

All Delegates you added will now be shown in your Delegation dashboard (see Figure 6).

**Step 2: Assigning a Questionnaire or a Section to the Delegate**

If you wish to **assign the entire questionnaire** to a Delegate, you can do this by clicking on Show, and then Delegate questionnaire. A drop-down list will allow you to choose from all questionnaires for which you are the Respondent.

**Figure 6 – Assigning the Entire Questionnaire**

The Delegation dashboard also allows easy removal of Delegate accounts if they no longer serve in this function. Simply click on Remove on the right.

You can manage all assignments at any time from the Delegate details page accessed through Show (see above).

More often than delegating the entire questionnaire to one user, Respondents will want to **assign specific sections** of the questionnaire to specific Delegates. In order to do this, simply go to the section in the report you wish to delegate, and click Delegate section on the right. This can be done for the entire section, or a specific sub-section. For an example, see Figure 7.
Figure 7 - Delegating Sections or Sub-Sections

A pop-up window will open, which will allow you to assign the section to any of your Delegates, and provides information on who already has access to this section (see Figure 8). The user rights can also be amended easily from this side.

Figure 8 - Managing Delegations for Sections or Sub-Sections
Submitting the Questionnaire

Once the Delegates have entered the data, the Respondent can review and revise all information before it is submitted. This way, control over the submission of the Annual National Report of an ASCOBANS Party remains with the person that has been officially assigned responsibility for it by their government.

When the Respondent clicks on Submit questionnaire on the top right of any page within the questionnaire, a pop-up window will appear:

![Pop-up window](image)

Submission is only possible if all mandatory questions in the reporting form have been answered.

The Secretariat will receive an email notification that the National Report of the Party has been submitted and the report can be downloaded. The Respondent will be taken back to the User Dashboard, which now indicates that the report has been submitted, and offers the additional option of requesting to revert this submission (see Figure 9).

Figure 9 – Confirmation of Submission
**Downloading the Report**

The system allows the *Repondent*, the *Delegates* and the Secretariat to generate and download the report that was created. This can be done through the *User Dashboard*, and can be done at any stage of the preparation of the report (see Figure 1 above).

Please note that the PDF does not automatically update. This means that if any changes were made to the answers in the questionnaires, a new PDF needs to be generated and downloaded in order to have these changes reflected.

**Concluding Remarks**

Please be aware that since this is still a new system, you may encounter occasional technical difficulties or functional problems. Please report those to the ASCOBANS Secretariat to help us improve the system and ensure a smooth user experience in future.