

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

[ASCOBANS Test User](#) | [Log out](#)

CMS Family Online Reporting System

Welcome ASCOBANS Test User

[Edit user](#) | [Delegation dashboard](#) | [Submission dashboard](#) | [Help pages](#)

Questionnaires for submission

Questionnaire title 	Created by	Creation date	Status	PDF download 	PDF download - short version 
2012 ASCOBANS Annual National Reports	Heidrun Frisch	27 December 2012	Not available	Generate	Generating
2013 ASCOBANS Annual National Reports	Heidrun Frisch	16 August 2013	Underway	Generate	 (Last generated at: 16 August 2013, 18:42) Regenerate

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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.

Figure 2 - Questionnaire Start Page

The screenshot shows the 'CMS Family Online Reporting System' interface for '2013 ASCOBANS Annual National Reports'. A red oval highlights the left-hand navigation menu. The menu items and their completion status are as follows:

Section	Completion Status
Introduction	Orange triangle (warning)
General Information	Orange triangle (warning)
Section A: Habitat Conservation and Management	Green plus (not all answered)
Section B: Research	Yellow star (new section)
Section C: Bycatches and Strandings	Yellow star (new section)
Section D: Legislation	Green square (all answered)
Section E: Information and Education	Yellow star (new section)
Difficulties	Yellow star (new section)

The main content area includes a 'Submit questionnaire' button, a 'Default language: English' setting, and a 'Questionnaire displayed in: English' indicator. A 'Submit questionnaire' button is also present in the top right corner. The main text area contains introductory information about the reporting format and objectives.

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.

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

The screenshot shows the CMS Family Online Reporting System interface. At the top right, it says 'ASCOBANS Test User | Log out'. Below the title, there is a navigation bar with buttons for 'Edit user', 'Delegation dashboard', 'Submission dashboard', and 'Help pages'. The 'Delegation dashboard' button is circled in red. Below the navigation bar, it says 'Welcome ASCOBANS Test User' and 'Questionnaires for submission'. There is a table with columns: Questionnaire title, Created by, Creation date, Status, PDF download, and PDF download - short version. Below the table are logos for CMS and AEWA.

Questionnaire title	Created by	Creation date	Status	PDF download	PDF download - short version
2012 ASCOBANS Annual National Reports	Heidrun Frisch	27 December 2012	Not available	Generate	Generating
2013 ASCOBANS Annual National Reports	Heidrun Frisch	16 August 2013	Underway	Generate	Generate

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

Figure 5 - Adding a Delegate

The screenshot shows the CMS Family Online Reporting System 'Delegates' page. At the top right, it says 'ASCOBANS Test User | Log out'. Below the title, there is a navigation bar with buttons for 'Add delegate', 'Delegation dashboard', and 'Submission dashboard'. The 'Add delegate' button is circled in red. Below the navigation bar, it says 'Delegates' and 'Help:'. There is a paragraph of text explaining what a delegate is and how to add one. Below the text, it says 'You have the following delegates' and there is a table with columns: Delegate full name, Created at, Email, and Options.

Help:

A delegate is a user that can help you fill your questionnaires. A delegate can be assigned with all the sections of your questionnaires or a subset of sections. You can add a delegate by clicking on the 'Add delegate' button.

For each of your delegates, listed in the table below, you have two available options: **Show**, and **Remove**. The **Remove** option will remove that delegate and all the delegations that were associated with it. The **Show** option will take you to a page with the details of the delegate, including the questionnaires that you have delegated it to. You can associate a delegate with a questionnaire directly from the questionnaire's submission page. Bare in mind that not all questionnaires have the delegation feature enabled.

You have the following delegates

Delegate full name	Created at	Email	Options
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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

CMS Family Online Reporting System ASCOBANS Test User | [Log out](#)

Delegates Add delegate | Delegation dashboard | Submission dashboard

Help:

A delegate is a user that can help you fill your questionnaires. A delegate can be assigned with all the sections of your questionnaires or a subset of sections. You can add a delegate by clicking on the 'Add delegate' button.

For each of your delegates, listed in the table below, you have two available options: **Show**, and **Remove**. The **Remove** option will remove that delegate and all the delegations that were associated with it. The **Show** option will take you to a page with the details of the delegate, including the questionnaires that you have delegated it to.

You can associate a delegate with a questionnaire directly from the questionnaire's submission page.

Bare in mind that not all questionnaires have the delegation feature enabled.

You have the following delegates

Delegate full name	Created at	Email	Options
Bettina Reinartz	16 August 2013	breinartz@ascobans.org	Show Remove
Rebecca Owen	16 August 2013	rowen@cms.int	Show Remove

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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

CMS Family Online Reporting System

ASCOBANS Test User | [Log out](#)

2013 ASCOBANS Annual National Reports

The screenshot shows the CMS Family Online Reporting System interface. On the left is a navigation menu with sections: Introduction, General Information, Section A: Habitat Conservation and Management, Section B: Research, Section C: Bycatches and Strandings, Section D: Legislation, Section E: Information and Education, and Difficulties. The main content area displays 'Use of Bycatches and Strandings', 'Post-Mortem Research Schemes', and 'Activities and Results'. Under 'Activities and Results', there is a section for '5.6 Necropsies' with a table for recording data. A red circle highlights the 'Delegate section' button for the 'Use of Bycatches and Strandings' section.

	Number	Recorded cause of death
Phocoena phocoena	<input type="text"/>	<input type="text"/>
Tursiops truncatus	<input type="text"/>	<input type="text"/>
Delphinus delphis	<input type="text"/>	<input type="text"/>
Stenella coeruleoalba	<input type="text"/>	<input type="text"/>

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

CMS Family Online Reporting System

ASCOBANS Test User | [Log out](#)

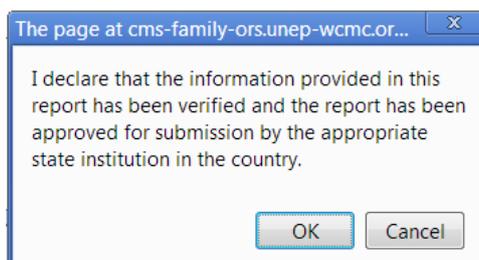
2013 ASCOBANS Annual National Reports

The screenshot shows the CMS Family Online Reporting System interface with a 'Delegate section' pop-up window open. The pop-up window displays 'Users delegated with the whole questionnaire' and lists 'Bettina Reinartz (Remove delegation)'. Below this, there is a section for delegating a specific part of the questionnaire. The 'Section' is set to 'Section C: Bycatches and Strandings' and the 'Delegate to' dropdown is set to 'Rebecca Owen'. A 'Delegate' button is visible at the bottom of the pop-up. The background shows the same interface as Figure 7, but with the table partially obscured by the pop-up.

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:



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

[ASCOBANS Test User](#) | [Log out](#)

CMS Family Online Reporting System

User's Details

Name: ASCOBANS Test User
Email: ascobans@ascobans.org
Language: English

[Edit user](#) | [Delegation dashboard](#) | [Submission dashboard](#) | [Help pages](#)

Filtering fields

Questionnaires for submission

Questionnaire title i	Created by	Creation date	Status	PDF download i	PDF download - short version i
2012 ASCOBANS Annual National Reports	Heidrun Frisch	27 December 2012	Not available	Generate	Generating
2013 ASCOBANS Annual National Reports	Heidrun Frisch	16 August 2013	Submitted Revert submission	Generate	Generate

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.