



Convention on the Conservation of Migratory Species of Wild Animals

Quick Guide for the CMS Online Reporting System

Prepared by the Secretariat of the Convention on the Conservation of Migratory Species
of Wild Animals

<http://cms-family-ors.unep-wcmc.org/>

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I. General remarks

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

Languages

The CMS reporting form is available in the three official languages of the Convention, English, French and Spanish. The language for each country is pre-set, so that French-speaking countries will see the form in French, and Spanish-speaking countries will see the form in Spanish. Nonetheless users are able to switch to another language within the questionnaire if they need to do so (Figure 1).


2014 NATIONAL REPORT OF PARTIES ON THE IMPLEMENTATION OF THE CONVENTION ON THE CONSERVATION OF MIGRATORY SPECIES OF WILD ANIMALS



The screenshot shows the top of the reporting form. On the left is a navigation menu with items: Introduction, Information about the respondents, I(a). General Information, I(b). Information about involved Authorities, II. Appendix I species, III. Appendix II Species, and IV. National and Regional Priorities. The main content area shows 'Default language: English', 'Available languages: English, Español, Français', and 'Year of creation: 2013'. A red circle highlights the text 'Questionnaire displayed in: English' with a tooltip icon, and below it are links for 'Change language', 'Cambiar el idioma', and 'Changez de langue'. To the right, there is a 'Submit questionnaire' button and instructions to download a PDF version or fill the questionnaire.

Figure 1. Changing the language settings

Tool tips

Tooltips are present throughout the system to assist users. These are identified with the following icon ; the tooltip can be displayed by hovering the mouse over the icon.

Help Pages

In addition to this user guide, a short help section has been compiled by the AEWA Secretariat and can be accessed from the home page menu.

II. How to register

Go to <http://cms-family-ors.unep-wcmc.org> and click on the link to the sign up page, either on the right hand side or on the menu on the top right.

Fill in your details and click on the sign up button. You will be automatically logged into the system and will receive an e-mail confirming the creation of your user account. Administrators of the system will also be notified of your registration. They will now be able to add you to their questionnaires.

The screenshot shows the 'CMS Family Online Reporting System' login and sign-up page. At the top right, there are links for 'Sign up | Log in' and a language dropdown menu set to 'English'. The main heading is 'CMS Family Online Reporting System'. Below the heading, there is a 'Welcome' message and a note that the tool is only available to registered users. The page is divided into two sections: 'Please login' and 'Or sign up'. The 'Please login' section includes an 'Email' input field, a 'Password' input field, and a 'Log in' button. The 'Or sign up' section provides instructions on what information is needed for registration and a link to the 'sign up page'. At the bottom, there are logos for CMS and AEW@A.

Figure 2. Online Reporting System Sign up or Log in page

III. User dashboard

After log-in, users are taken to their dashboards (Figure 3), which give users access to the questionnaires (reporting forms) they have been assigned. For users who are National 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*.**

Norway CMS | [Log out](#)

CMS Family Online Reporting System

Welcome Norway CMS

Questionnaires for submission

Questionnaire title i	Created by	Creation date	Status	PDF download i	PDF download - short version i
2014 NATIONAL REPORT OF PARTIES ON THE IMPLEMENTATION OF THE CONVENTION ON THE CONSERVATION OF MIGRATORY SPECIES OF WILD ANIMALS	Natalie Epler	06 July 2010	Underway	Generate	Generating

Powered by

Figure 3. User dashboard

In the example above, only the CMS National Report has been assigned to the user “Norway”. Active questionnaires are linked in the dashboard and the status is set as *Underway*, as shown. Questionnaires (i.e. reporting forms) which have been closed will be listed but not linked.

Downloading the Report

The system allows all users 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 (Figure 3).

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.

For any of your questionnaires you can generate both a long and a short PDF, with the short PDF only containing questions to which you have answered.

The PDF will be generated in a background job and the ORS will email you once it has finished generating it.






IV. 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 3. All sections of the questionnaire can be accessed through the menu on the left.



Figure 4. Questionnaire start page

The status icons in the menu indicate to which degree the section has been completed. The different possible statuses are:

-  New section, no answers provided yet
-  No answers added
-  Answers to mandatory questions missing
-  All mandatory questions answered, but some non-mandatory questions still unanswered
-  All questions answered

For Parties that have submitted timely reports to COP10, some data has been prefilled. In this case, Parties only need to update and complete the respective 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. You can also increase or decrease the size of text boxes by grabbing and moving the lower right corner of the box with your mouse.

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.

There is also a collapse/expand icon that hides or displays that section's contained components, which makes the questionnaire easier to handle (Figure 5).



Figure 5. Pull the lower right corner of a text box to increase its size. Attach supporting documentation as appropriate. Save section after completing it!

The system will automatically save content at regular intervals (every 30 seconds), even when a user moves between sections. Nonetheless it is recommendable to save your input into each section by clicking on the “Save all” button next to each section.

V. 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 Focal Points can be account holders for the respective Party. This function cannot be delegated and the log-in details of the National Focal Points, 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 Focal Point 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.

VI. How to delegate (sections of) the questionnaire

Step 1: Creating Delegate Accounts

First, the National Focal Point 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* (Figure 6).

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

Welcome ASCOBANS Test User

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	Underway	Generate	Generate

Figure 6. Accessing the Delegation dashboard

Next, click on *Add delegate* (Figure 7).

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

Delegates

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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Figure 7. 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* (Figure 8).

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@rms.int	Show Remove



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Figure 8. Assigning the entire questionnaire from your Delegation dashboard

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*.

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 9.

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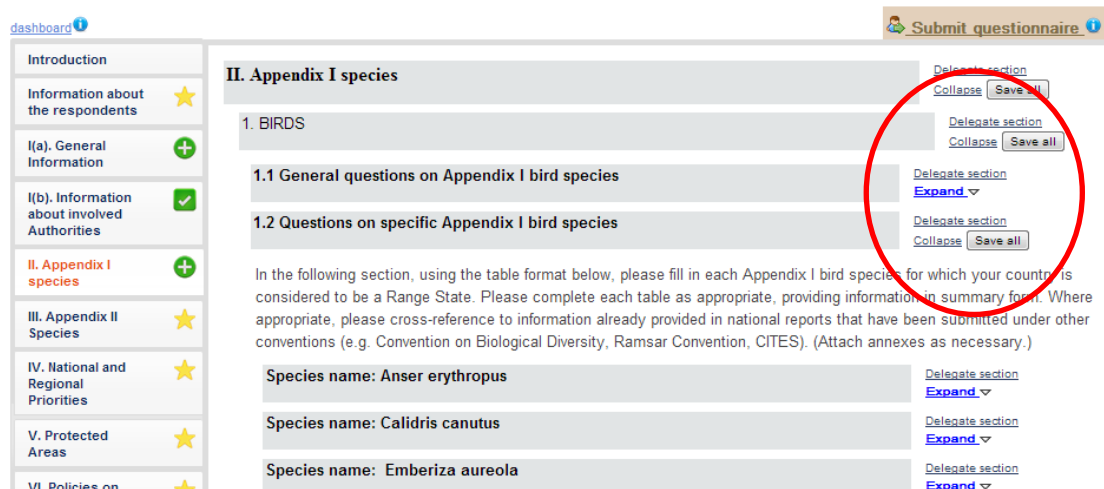


Figure 9. Delegating sections or sub-sections

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 (Figure 9). The user rights can also be amended easily from this end.

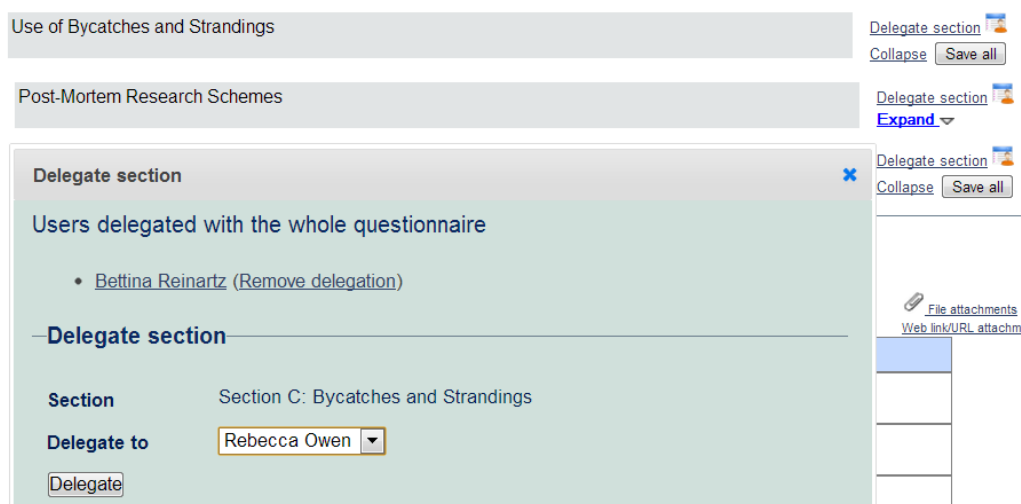


Figure 10. Managing delegations for sections or sub-sections

VII. 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 National Report 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 (Figure 11).

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	Submitted Revert submission	Generate	Generate

Figure 11. Confirmation of submission and link to revert submission

VIII. Concluding Remarks

Please report any technical difficulties or functional problems that you may face while using the Online Reporting System to the CMS Secretariat to help us improve the system and ensure a smooth user experience in future.

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