

## CMS Online Reporting System User Guide

This document is purposed towards the successful completion of the 2019 CMS National Report for the Parties of the Convention on the Conservation of Migratory Species of Wild Animals. It focuses on the technical aspects of the Online Reporting System.

Parties amended the format of National Reports template to facilitate the assessment of the implementation of the Strategic Plan for Migratory Species 2015-2023. For support on the substantive interpretation of the new template, please consult the guidance document prepared to support compliers of CMS National Report, available in the ORS.

The deadline for the submission of National Reports for COP-13 is **August 17, 2019**

## Table of Contents

<b>ROLES</b>	<b>2</b>
Respondent	2
Delegate	2
<b>1.0. RESPONDENT</b>	<b>2</b>
1.1. Getting started	2
1.2. Accessing the tool	2
1.3. Accessing the questionnaire	3
1.4. Questionnaire layout and language selection	4
1.5. Task delegation	4
1.6. Completing sections	7
1.7. Section III. Species on the Convention Appendices	7
1.8. Report Submission	8
<b>2.0. DELEGATE</b>	<b>8</b>
2.1. Getting started	8
2.2. Completing tasks	9

## Roles

The following roles are designated within the tool:

### Respondent

This role is the individual responsible for the 2019 CMS National Report, typically the National Focal Point. The email address of the respondent is assigned to the corresponding Party profile. Respondents may complete all sections of the questionnaire or may delegate sections or subsections to delegates. The report may only be submitted by the respondent.

### Delegate

This role is a user that can be assigned sections or subsections to complete on behalf of the respondent. The respondent must approve all assigned tasks completed by the delegate before submittal.

## 1.0. Respondent

### 1.1. Getting started

- 1.1.1. When the e-mail address of the respondent is assigned to the Party Profile by the CMS Secretariat, an email will be sent. The email contains login details and a link to the tool.
- 1.1.2. If you have previously received login details, see 1.2.

Hello \_\_\_\_\_,

You have been registered as a respondent in the CMS Online Reporting System

You can access the website through the following link: <http://cms-ort.ort-production.linode.unep-wcmc.org/>.

Your log in details are as follows:

**Email:** \_\_\_\_\_

**Password:** \_\_\_\_\_

Kind regards,  
CMS Online Reporting System

### 1.2. Accessing the tool

- 1.2.1. The tool can be accessed from <https://www.cms.int/en/documents/national-reports> on the CMS website. Documents -> National Reports.

<a href="#">Access the CMS Online Reporting System</a>	<a href="#">Online User Guide &amp; Documentation</a>	<a href="#">Quick Guide for the CMS Online Reporting System [PDF]</a>
<a href="#">Revised CMS National Report Format [EN]</a>	<a href="#">Format révisé pour les Rapports nationaux de la CMS [FR]</a>	
<a href="#">Modelo revisado para los Informes Nacionales de la CMS [ES]</a>		

1.2.2. Enter your log in details.

1.2.3. If password issues occur at any time, please attempt creating a new password through “Forgotten your password?”. If you don’t receive an email with the new password, please check your Junk folder.

**Note:** Delegates assigned by respondents must sign-up to use the system on this page before use.

## Welcome

This tool is only available to registered users.

[Forgotten your password?](#)

### Please login

Email

Password

[Log in](#)

### Or sign up

To do so you will need to provide an email address, choose a password and input some details about yourself.


[Please go to the sign up page](#)

## 1.3. Accessing the questionnaire

1.3.1. Select “2019 CMS National Report” under “Questionnaire title” to begin.

1.3.2. Note that the “Status” is “Underway”. Upon submission, it will read “Submitted”.

[Alexander Piro](#) | [Log out](#)



**CMS Online Reporting System**

[Submission dashboard](#) [Administration dashboard](#)

[Edit my Account](#) [Manage my Delegations](#)

**ONLINE REPORTING SYSTEM**

UN WCMC  
environment 40 years

Welcome Alexander Piro

### Questionnaires for submission

Questionnaire title ⓘ	Created by	Creation date	Status	PDF download ⓘ	PDF download - short version ⓘ
<a href="#">2019 CMS National Report</a>	Frances Davis	01/18/2019	Underway	<a href="#">Generate</a>	<a href="#">Generate</a>

1.3.3. PDF reports may be generated at any time. PDF – short version creates a report of only the questions that have been answered, while the regular PDF is the entire questionnaire. The PDF icon must be selected to download the generated reports.

Questionnaire title ⓘ	Created by	Creation date	Status	PDF download ⓘ	PDF download - short version ⓘ
<a href="#">2019 CMS National Report</a>	Frances Davis	01/18/2019	Underway	<a href="#">Generate</a>	 Last generated at: 03 July 2019, 13:32 <a href="#">Regenerate</a>

## 1.4. Questionnaire layout and language selection

1.4.1. The layout of the tool demonstrates all sections to be completed on the left ribbon.

1.4.2. Select sections on the left ribbon individually to show subsections and questions to be answered.

1.4.3. The language is predetermined by assigned country; however, the user may reset to the language of their choosing.

2019 CMS National Report

Save all Submit questionnaire

Deadline for submission of the National Reports: 17 August 2019

Reporting period: from April 2017 to August 2019

Parties are encouraged to respond to all questions and are also requested to provide comprehensive answers, when required.

COP Resolution 9.4 called upon the Secretariats and Parties of CMS Agreements to collaborate in the implementation and harmonization of online reporting implementation. The CMS Family Online Reporting System (ORS) has been successfully implemented and used by CMS, AEWA, IOSEA and Sharks MOU in collaboration with UNEP-WCMC.

Decision 12.4 requested the Secretariat, taking account of advice from the informal advisory group, to develop a proposal to be submitted for the approval of the 48th meeting of the Standing Committee (StC48) for a revision of the format for the national reports to be submitted to the 13th meeting of the Conference of the Parties and subsequently. The new format was adopted by StC48 in October 2018 and made available as an offline version downloadable from the CMS website in December 2018. The revised format aims inter alia at collecting data and information relevant to eight indicators adopted by COP12 for the purpose of assessing implementation of the Strategic Plan for Migratory Species 2015-2023.

This online version of the format strictly follows the one adopted by StC48. In addition, as requested by StC48, it incorporates pre-filled information, notably in Sections II and III, based on data available at the Secretariat. This includes customized species lists by Party. Please note that the lists include taxa at the species level originating from the disaggregation of taxa listed on Appendix II at a level higher than species. Please review the information and update or amend it, when necessary.

The Secretariat was also requested to develop and produce a guidance document to accompany any revised National Report Format. Please note that guidance has been provided for a number of questions throughout the national report as both in-text guidance and as tool tips (displayed via the information 'i' icon).

For any question, please contact Ms. María José Ortiz, Programme Management Officer, at maria-jose.ortiz@cms.int

**Questionnaire Information**

Default Language: English  
Available Languages: English, Español, Français  
Year of creation: 2018

Questionnaire displayed in: English

To download the pdf version of this questionnaire, please go to the [dashboard](#)

[Change language](#)  
[Cambiar idioma](#)  
[Changer de langue](#)

**Submission Guidance**

After filling the questionnaire you can submit it by clicking the 'submit questionnaire' button. You will then receive an e-mail confirming the submission.

After submitting the questionnaire you will still be able to visit the page, but you will not be able to make any changes to your answers.

To fill this questionnaire please choose from the sections on the left.

## 1.5. Task delegation

1.5.1. A delegate must first be added before delegating tasks.

1.5.2. Select Submission dashboard -> Manage my Delegations -> Add delegate.

Submission dashboard Administration dashboard

Edit my Account Manage my Delegations

Manage your delegates

Add delegate

- 1.5.3. Select from the list if the designate is pre-existing, please note that spatial gaps in the list are present.
- 1.5.4. All fields are compulsory to properly add a delegate.
- 1.5.5. The choice may be given to allow the delegate to overwrite answers provided in text boxes.

Submission dashboard Administration dashboard  
Edit my Account Manage my Delegations

### Add delegate for Alexander Piro

Select an existing delegate

Create a new delegate

Email

Delegate first name

Delegate last name

Language

Allow this delegate to overwrite text answers.

Add delegate

- 1.5.6. Once added, the delegate will appear in the “Manage you delegates” tab.

#### You have the following Delegates

Delegate full name	Created at	Email	Options
Alex P	07/03/2019	<a href="mailto:alex.piro01@gmail.com">alex.piro01@gmail.com</a>	<a href="#">Show</a>   <a href="#">Remove</a>

- 1.5.7. Once added, delegates may be selected in the questionnaire screen to complete a task.

2019 CMS National Report

Introduction

[High-level summary of key messages](#)

II. Accession/Ratification of CMS Agreements/MOUs

- 1.5.8. The selection generates a pop-up with a list of delegates that have been previously added in step 1.5.2.

Delegate this section:: VI. Mainstreaming Migratory Species in Other Sectors and Processes

Delegate to:

1.5.9. To add subsections within a section to a delegate, access the “Manage your delegates” tab under “Submission dashboard” and select “Show” under “Options”.

You have the following Delegates

Delegate full name	Created at	Email	Options
Alex P	07/03/2019	<a href="mailto:alex.piro01@gmail.com">alex.piro01@gmail.com</a>	<a href="#">Show</a> <a href="#">Remove</a>

1.5.10. From this selection, the respondent may edit, remove, or manage the delegate.

1.5.11. Selecting “Edit” allows the respondent to provide remarks on the assigned delegation and select whether the respondent allows the delegate to view the entire questionnaire.

1.5.12. Selecting “Remove” deletes the delegate from the questionnaire.

Delegated Questionnaires

[Delegate new questionnaire](#)

Questionnaire	Remarks	Options
<a href="#">2019 CMS National Report</a>		<a href="#">Edit</a>   <a href="#">Manage</a>   <a href="#">Remove</a>

1.5.13. When “Manage” is selected in 1.5.10, the respondent can assign subsections or full sections with “Add sections”.

1.5.14. The respondent may also edit or remove sections that have been already delegated to the delegate.

Delegated sections

Section	Main Section	Loop items
XVI. National Biodiversity Strategies and Action Plans	XVI. National Biodiversity Strategies and Action Plans	<a href="#">Edit</a>   <a href="#">Remove</a>

[Add sections](#)

1.5.15. When a delegate completes a task, the respondent must select “Mark question as answered” if acceptable.

1.5.16. Once a delegate has submitted an answer into the “Delegate” text box, copy and paste the answer into the “Respondent” box.

**Note:** The “Accept answer” button automatically copies answers from the “Delegate” box into the “Respondent” box. This will **overwrite** what has already been entered in the “Respondent” box. Any previous information from multiple delegates copied into the “Respondent” text box will be **overwritten** in this case.

- Increased
- The same
- Decreased
- Not known

[Clear answer](#)

Answered by: [Alex P](#) (2019-07-03 08:57:59 UTC)



Mark question as answered

Which are the most important CMS implementation priorities requiring future support in your country? (Name up to three specific types of activity).

N/A

Respondent

Answered by: You (2019-07-03 08:57:59 UTC)



Mark question as answered

N/A

Delegate(s)




Answered by: [Alex P](#) (2019-07-03 08:55:34 UTC)

[Accept answer](#)

## 1.6. Completing sections

- 1.6.1. Selection of a section will present questions, from which textboxes may drop down depending on the answer.
- 1.6.2. Provide as much information as necessary.
- 1.6.3. Complete this for all sections.

The screenshot shows a questionnaire interface. On the left is a sidebar with navigation links: Introduction, High-level summary of key messages, I. Administrative Information, II. Accession/Ratification of CMS Agreements/MOUs, III. Species on the Convention Appendices, IV. Legal Prohibition of the Taking of Appendix I Species, V. Awareness, VI. Mainstreaming Migratory Species in Other Sectors and Processes, VII. Governance, Policy and Legislative Coherence, VIII. Incentives, and IX. Sustainable Production and Consumption. The main content area is titled 'IV. Legal Prohibition of the Taking of Appendix I Species' and contains the question: 'Is the taking of Appendix I species prohibited by national or territorial legislation in accordance with CMS Article III(5)?'. Below the question are four radio button options: 'Yes for all Appendix I species' (selected), 'Yes for some species', 'Yes for part of the country, or a particular territory or territories', and 'No'. There is a 'Clear answer' link. Below the options is a text input field with the placeholder 'Please identify the legal statute(s) concerned'. The input field contains 'N/A'. There are 'Save' and 'Clear' icons next to the input field. At the top right of the main content area are 'Collapse' and 'Delegate section' buttons.

- 1.6.4. Please also note that throughout the process, the symbols,   , can be used to attach documents and weblinks. Please fill in as much information as is available for each of the attachments/weblinks.
- 1.6.5. Note that hovering over the  symbol provides useful tips and guidance for completing sections.

## 1.7. Section III. Species on the Convention Appendices

- 1.7.1. Please note that Section III requires the user to download the “Appendix I Species Occurrence List” and the “Appendix II Species Occurrence List”.
- 1.7.2. The user must follow the hyperlink available on the section page. Appendix II is the same process.

The screenshot shows a questionnaire interface. At the top left is the title '2019 CMS National Report'. At the top right are 'Save all' and 'Submit questionnaire' buttons. The sidebar on the left has navigation links: Introduction, High-level summary of key messages, I. Administrative Information, II. Accession/Ratification of CMS Agreements/MOUs, and III. Species on the Convention Appendices. The main content area is titled 'III. Species on the Convention Appendices' and contains the text: 'Please confirm that the Excel file linked to below correctly identifies the Appendix I species for which the country is a Range State. Please download the Appendix I species occurrence list for your country [here](#).' There are 'Collapse' and 'Delegate section' buttons at the top right of the main content area.

- 1.7.3. The hyperlink leads to a Dropbox, from which Appendix I and Appendix II lists can be downloaded per country.

The screenshot shows a Dropbox folder view. At the top is the title 'III. Species on the Convention Appendices' and the text 'Sorted by name'. Below the title are five blue folder icons. Below each folder icon is the name of the country: Afghanistan, Albania, Algeria, Angola, and Antigua and Barbuda.

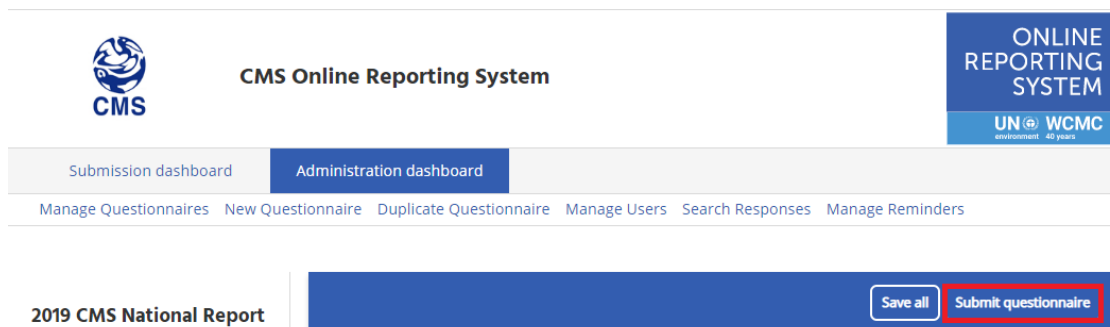
1.7.4. After downloading the files and completing the excel sheets, do not forget to upload them back to the questionnaire using the file attachment feature (see 1.6.4).

**Note:** The size of the file must be limited to 10 megabytes.

1.7.5. If issues arise during the attempt to access the lists, please check your security settings or try another browser before contacting the CMS team.

## 1.8. Report Submission

1.8.1. Once all sections have been completed to the best of ability, select submit at the top of the questionnaire screen.



1.8.2. The final confirmation text will be presented to the respondent before submittal.

cms-ort.ort-production.linode.unep-wcmc.org says

I declare that the information provided in this report has been verified and the report has been approved for submission by the appropriate state institution in the country.



1.8.3. Once submitted, the questionnaire is still available to view. Before the deadline for submission, respondents may request the CMS team to revert the submission to make additional changes. PDF reports can be generated as demonstrated in 1.3.3.

## 2.0. Delegate

### 2.1. Getting started

2.1.1. As a delegate, a profile must be created before accessing the tool. To create an account, see 1.2.

2.1.2. Upon delegation from a respondent, an email will be sent. The email contains a link to the tool.

Hello \_\_\_\_\_,

You have been granted access to the following questionnaire:

**Title:** 2019 CMS National Report

**Default Language:** English

**Available Languages:** Spanish, French, English

You can start filling this questionnaire at <http://cms-ort.ort-production.linode.unep-wcmc.org/questionnaires/72/submission>.

It will also be available in your submission dashboard.

Kind regards,  
CMS Online Reporting System



2.1.3. Following the link, the delegate will be taken to the section assigned to them for completion by the respondent.

## 2.2. Completing tasks

2.2.1. The delegated sections can be viewed by selecting the “List of delegated sections” and may also be highlighted in the left ribbon. What is visible to a delegate is determined by the respondent.

2019 CMS National Report

[list of delegated sections](#)

Save all Submit questionnaire

Deadline for submission of the National Reports: 17 August 2019

Reporting period: from April 2017 to August 2019

Parties are encouraged to respond to all questions and are also requested to provide comprehensive answers, when required.

COP Resolution 9.4 called upon the Secretariats and Parties of CMS Agreements to collaborate in the implementation and harmonization of online reporting implementation. The CMS Family Online Reporting System (ORS) has been successfully implemented and used by CMS, AEWA, IOSEA and Sharks MOU in collaboration with UNEP-WCMC.

Decision 12.4 requested the Secretariat, taking account of advice from the informal advisory group, to develop a proposal to be submitted for the approval of the 48th meeting of the Standing Committee (StC48) for a revision of the format for the national reports to be submitted to the 13th meeting of the Conference of the Parties and subsequently. The new format was adopted by StC48 in October 2018 and made available as an offline version downloadable from the CMS website in December 2018. The revised format aims inter alia at collecting data and information relevant to eight indicators adopted by COP12 for the purpose of assessing implementation of the Strategic Plan for Migratory Species 2015-2023.

This online version of the format strictly follows the one adopted by StC48. In addition, as requested by StC48, it incorporates pre-filled information, notably in Sections II and III, based on data available at the Secretariat. This includes customized species lists by Party. Please note that the lists include taxa at the species level originating from the disaggregation of taxa listed on Appendix II at a level higher than species. Please review the information and update or amend it, when necessary.

The Secretariat was also requested to develop and produce a guidance document to accompany any revised National Report Format. Please note that guidance has been provided for a number of questions throughout the national report as both in-text guidance and as tool tips (displayed via the information 'i' icon).

Introduction

High-level summary of key messages

I. Administrative Information

II. Accession/Ratification of CMS Agreements/MOUs

III. Species on the Convention Appendices

IV. Legal Prohibition of the Taking of Appendix I Species

V. Awareness

VI. Mainstreaming Migratory Species in Other Sectors and Processes

2.2.2. When accessing the tool from the CMS website, the delegate must select “Submission dashboard” and “Delegated to me” to access delegated tasks.

Submission dashboard

Edit my Account Delegated To Me Manage my Delegations

# Welcome Alex P

You have been delegated with the following tasks:

Questionnaire: [2019 CMS National Report](#)

Delegator: Alexander Piro

Delegator remarks: -

Details: 1 section to fill [Show](#)

- 2.2.3. Entire sections or individual subsections may be assigned to the delegate. The assigned sections or subsections are open to edit by the delegate and textboxes are labelled for each.
- 2.2.4. For more information on task completion, see 1.6, and for more information on the questionnaire, see 1.4.

Please identify the legislation, policies or action plans concerned:

The screenshot shows a web form interface. At the top, there is a horizontal line. Below it is a large, empty rectangular input field. To the right of this field is a label 'Respondent' with a left-pointing arrow. Below the input field are two small blue icons: a lock and a key. A dashed horizontal line separates this section from the one below. Below the dashed line is another large rectangular input field containing the text 'N/A'. To the right of this field is a label 'Delegate(s)' with a right-pointing arrow. The entire 'N/A' field and its label are highlighted with a red border.

- 2.2.5. Upon completion, the sections or subsections will be evaluated and accepted by the respondent.
- 2.2.6. Delegates may also delegate tasks. See section 1.5.

**NOTE: The tool automatically saves every few moments, however, it is well advised to save before exiting and updating any changes made.**

For complications please consult the Support Centre within the tool.

For further complications please contact Alex Piro ([alexander.piro@cms.int](mailto:alexander.piro@cms.int)) and Maria Jose Ortiz ([maria-jose.ortiz@un.org](mailto:maria-jose.ortiz@un.org)) from the CMS Secretariat team.