The Online Reporting System

A User Guide

UNEP WCMC

Contents

Table of Figures

1 Introduction

The Online Reporting System (ORS) is a web application that provides the means to create and manage multiple questionnaires that can be answered by any number of registered users. The system incorporates multiple features that aim to make the reporting process easier for both those creating and those using the questionnaires, and allow for greater flexibility in questionnaire structure.

This user guide provides a detailed overview of the features offered by the system and step-by-step instructions for their use.

2 Online Reporting System at a glance

This section provides an introduction to the overall organization of the ORS. Detailed explanation of the features mentioned in this section is provided in following sections.

2.1 Access

Access to the ORS is restricted to registered users. Users can either register themselves via the sign up page (http://cms-family-ors.unep-wcmc.org/signup), or an administrator of the system can add them.

2.1.1 How to register

1. Point your web browser to http://cms-family-ors.unep-wcmc.org;

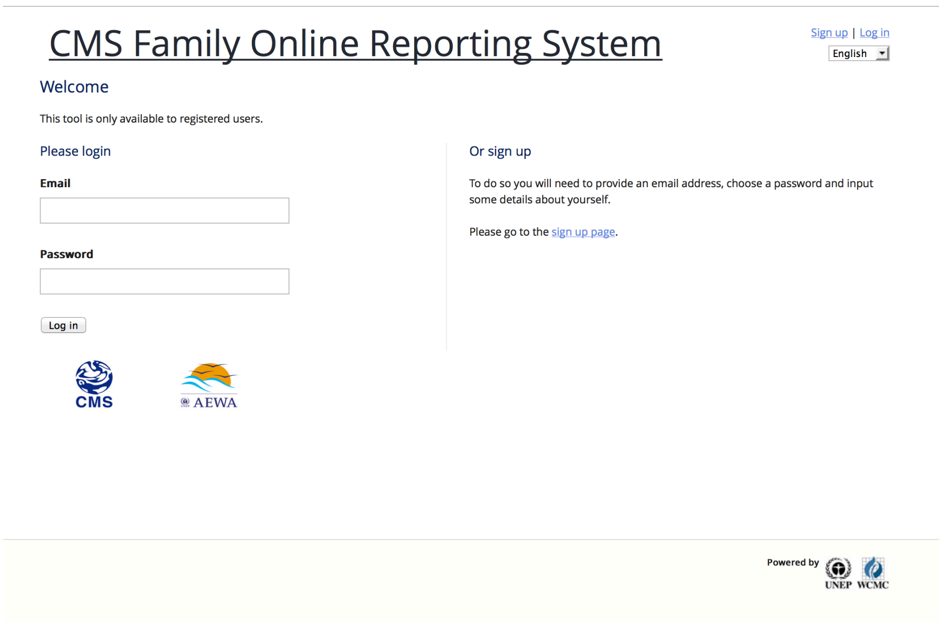


Figure 1 ORS Home Page

2. Click on the link to the sign up page, either on the right hand side or on the menu on the top right;

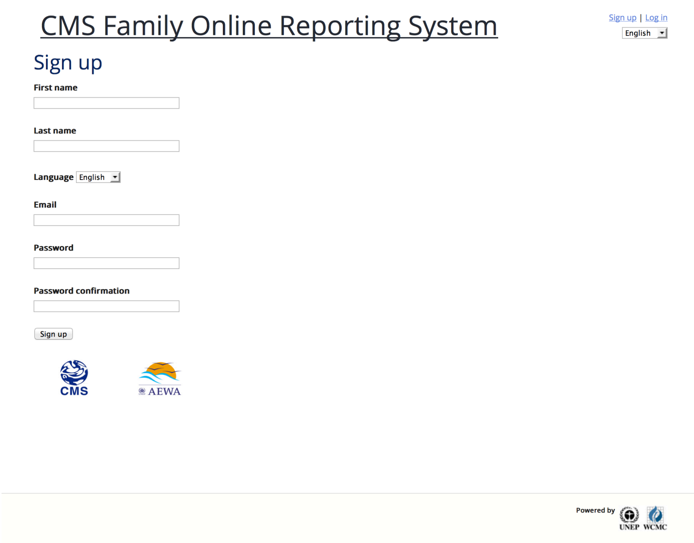
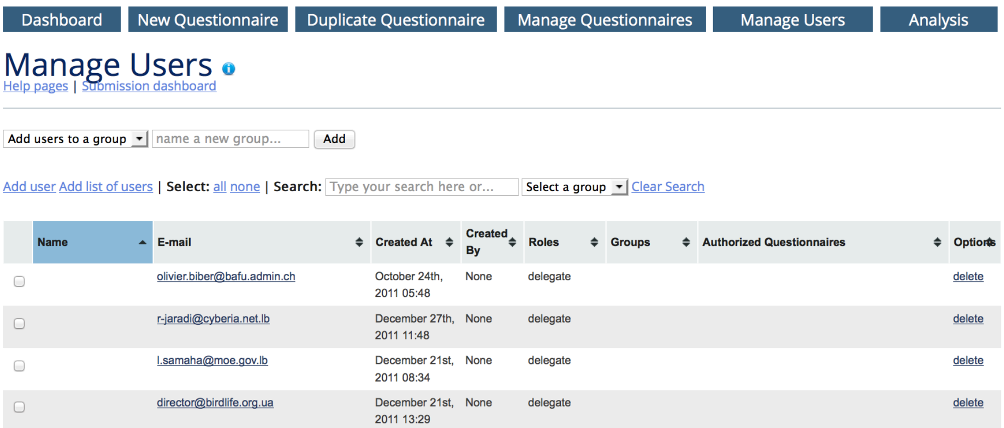


Figure 2 Sign up page

3. Fill in your details and click on the sign up button;
4. You will be automatically logged into the system and will receive and email 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.

2.1.2 How to add users

1. Click on the 'Manage Users' link from the administration dashboard main menu;



Name	E-mail	Created At	Created By	Roles	Groups	Authorized Questionnaires	Options
	olivier.biber@bafu.admin.ch	October 24th, 2011 05:48	None	delegate			delete
	r-jaradi@cyberia.net.lb	December 27th, 2011 11:48	None	delegate			delete
	l.samaha@moe.gov.lb	December 21st, 2011 08:34	None	delegate			delete
	director@birdlife.org.ua	December 21st, 2011 13:29	None	delegate			delete

Figure 3 Manage Users

2. Click on 'Add user' or 'Add list of users' links on the left hand-side just above the table with the existing users;
3. If clicked on 'Add user':
   3.1. Fill in the details of the user in the dialog box, including the user roles;

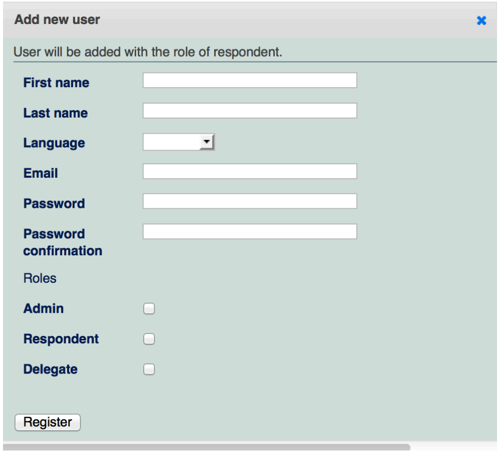


Figure 4 Add user

   3.2. Click on the 'Register' button, the user will be added and you will be returned to the 'Manage Users' page. **Note:** if any errors occur while adding a user you will be brought back to the user form with information about the errors;
4. If clicked on 'Add list of users':
   4.1. Prepare file with the information of the users to be added as per instructions in the page;

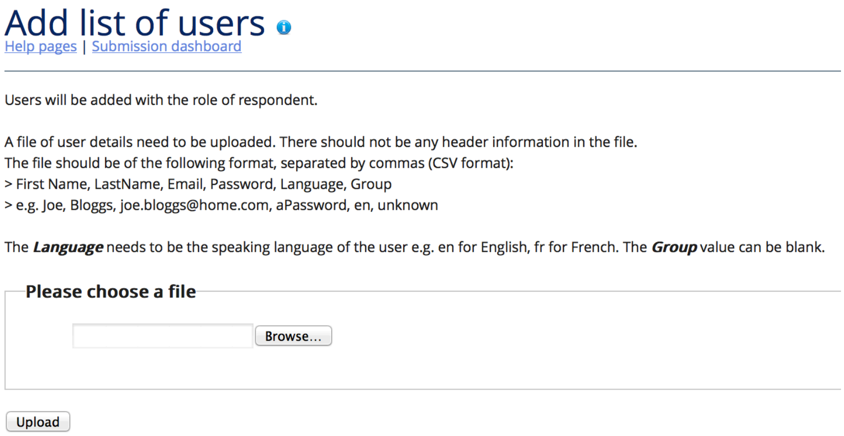


Figure 5 Add list of users

   4.2. Select file to upload;
   4.3. Click on the 'Upload' button.

2.2 User Roles

The ORS defines three types of user roles. Users can be assigned any combination of these three roles.

2.2.1 Administrator (admin)

The 'administrator' role grants the user access to the administration functions of the ORS, such as creating questionnaires and managing users.

2.2.2 Respondent

The 'respondent' role allows the user to answer any questionnaires to which they have authorised access.

2.2.3 Delegate

A user with the ‘delegate’ role can be assigned with answering all or part of any questionnaires as designated by a respondent.

2.3 Dashboards

The ORS functions are organized into two main dashboards: the ‘submission dashboard’ and the ‘administration dashboard’.
Through the ‘submission dashboard’ the respondents can access their ‘delegates dashboard’, while an administrator can access a questionnaire’s ‘questionnaire dashboard’ from the ‘administration dashboard’.

2.3.1 The Administration Dashboard

The administration dashboard is only accessible to users with the administrator role. Administrators can access all the questionnaire and user management features from this dashboard.

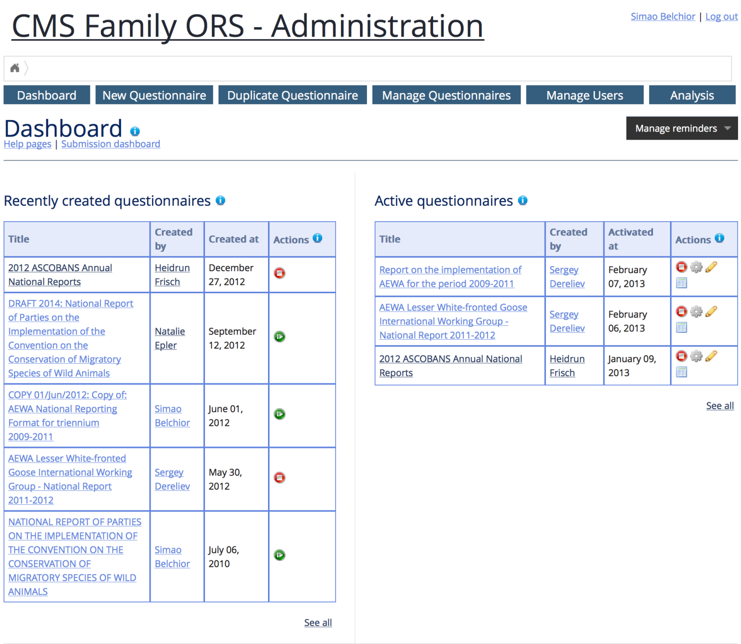


Figure 6 Administration Dashboard

These features are available from one of two menus present in the dashboard, which are visible in the above figure.

- The top dark blue menu is the ‘main menu’, and does not change from page to page. This menu allows a user to go back to the dashboard, add a new questionnaire, duplicate a questionnaire, go to the list of questionnaires (manage questionnaires link), go to the list of users (manage users link), and in the future to the analysis page (this link is currently disabled).
- The menu with black background that sits on the right-hand side is the ‘context menu’. This menu provides link to pages relevant to the page being viewed. For instance when on a questionnaire dashboard the menu will display options relevant to the management of the questionnaire; when on a section page it will display options relevant to the section. By hovering the mouse over the options on the ‘context

menu', further details about it will be displayed. The 'context' menu is available in both the 'administration dashboard' and the 'submission dashboard'.

2.3.2 How to go to the Administration dashboard?

1. After logging into the system as an Administrator click on the title of the web application, "CMS Family Online Reporting System", or on the link "Administration Dashboard" under the "Welcome [your name] message".

2.3.3 The Submission Dashboard

The submission dashboard is where respondents and delegates can access the questionnaires that they have been authorized to answer, and view and edit their user profiles. From this dashboard, respondents can also generate and download a PDF version of a questionnaire, as well as manage their delegates.

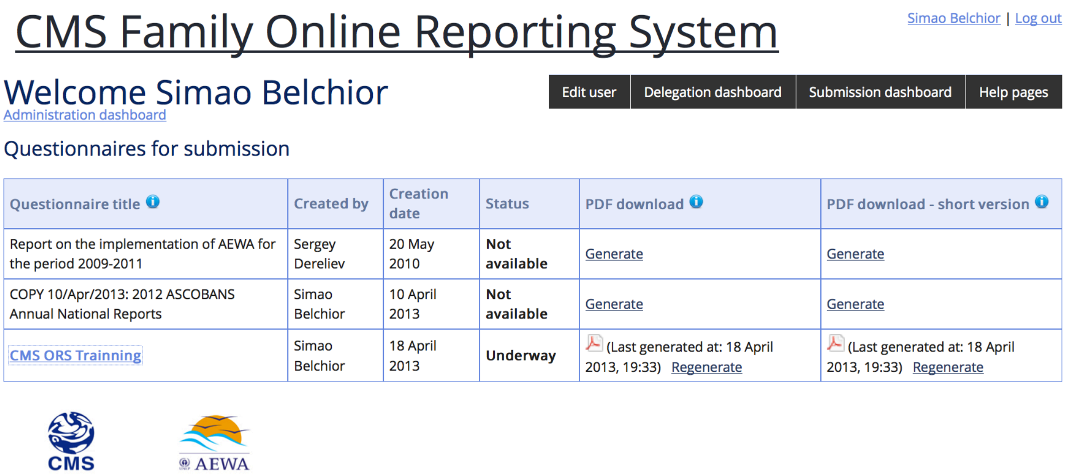


Figure 7 Submission dashboard

2.4 Languages

The ORS is capable of supporting multiple languages. Currently the home page and submission dashboard are available in the three CMS Family working languages: English, French, and Spanish. The default language of the system is English, however each user may change the default language associated with their profile. Questionnaires created in the ORS can have one or more of the six U.N. languages associated with them, with the text in any of the chosen languages being provided by the creators of the questionnaires.

2.5 Tooltips

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.

2.6 Help Pages

A short help section has been compiled by the AEWA Secretariat and can be accessed from the home page menu.

Figure 8 Help Pages

3 Creating a Questionnaire

This section of the user guide provides information on how questionnaires are created using the ORS.

3.1 Structure

In the ORS a questionnaire is composed of sections and questions. Sections can be seen as the building blocks of the questionnaire structure, and can contain any number of questions or other sections. In the system the questionnaire structure is represented in the same way as a tree of folders and files, with the questionnaire information serving as the root of the tree, sections being represented as folders and questions as files.

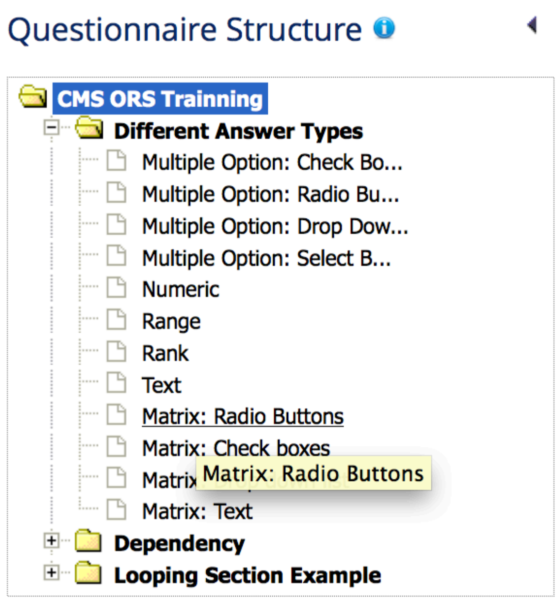


Figure 9 Questionnaire Structure

3.2 Questionnaire information

When a questionnaire is created, a number of details can be filled in and configuration options selected.

3.2.1 Basic information

The basic information of a questionnaire includes:

- **Default language of the questionnaire**;
- **Title of the questionnaire**; and
- **Introductory remarks**, which are displayed to all users when they access the questionnaire.

These three fields are mandatory for any questionnaire.
This basic information also includes the option to select multiple languages for the questionnaire and to provide a title and any introductory remarks in those languages; these details are not mandatory for any language other than the default language When no information is added in a given language, the system will default to the questionnaire's default language.

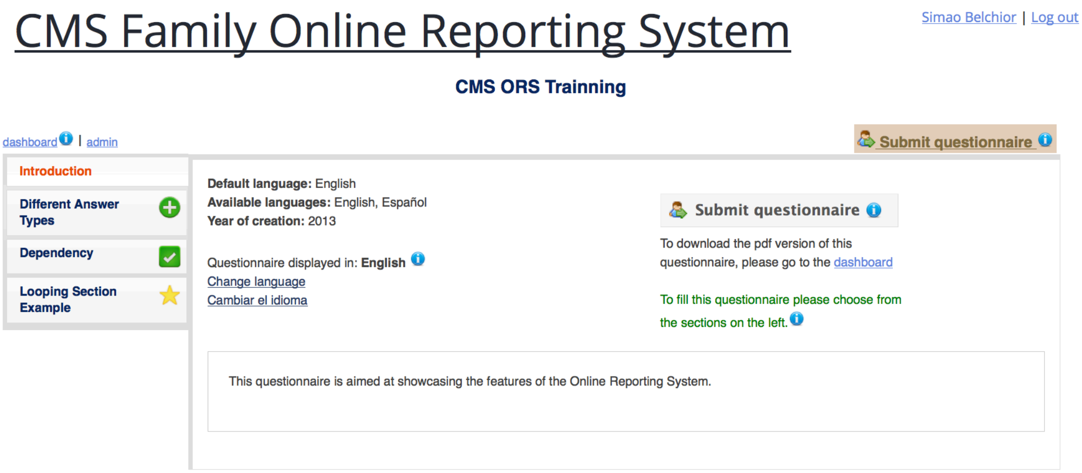


Figure 10 Questionnaire submission page with questionnaire information displaying on the right-hand side and navigation menu on the left-hand side

3.2.2 Extra information

The extra information of the questionnaire includes more advanced configuration options. These are:

- **Questionnaire date**. A combination of month and year.
- **Administrator remarks**. Used to provide details to other administrators who may be collaborating in building and managing the questionnaire.
- **Header**. a banner to be displayed at the top of the questionnaire submission page. The header should be a JPEG or PNG file with no more than 940px of width and 90px of height, and a file size of less than five megabytes.
- **Section maximum tab display level**. In the questionnaire submission page navigation is made via a group of tabs that, by default link to the root sections of the questionnaire. The ORS allows other sections to also be added to the navigation menu. Sections in a level higher than the

'section maximum tab display level' can not be added to the navigation menu;

- **Questionnaire delegation feature enabled**. If this option is not selected, respondents will not be able to delegate this questionnaire.
- **Display translator for text type answers**. This option enables or disables the automatic answer translator for the questionnaire. This translator allows any text answer to be automatically translated into English.
- **Documents attached to answers are private**. This option allows only authorized users of the ORS to access documents that have been attached to answers.
- **Name of the help pages**. This option allows a page under the help pages of the ORS to be linked to a questionnaire.

3.2.3 How to create a questionnaire

1. To add a questionnaire click on the 'New Questionnaire' link on the administration dashboard main menu;

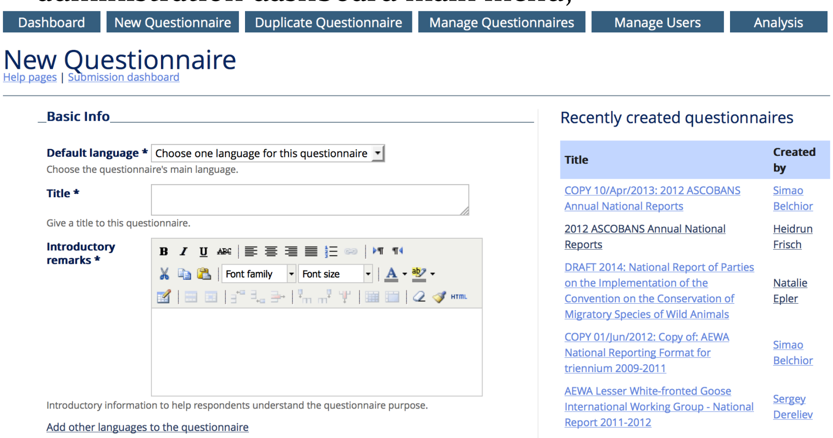


Figure 11 New Questionnaire

2. Fill in the basic information of the questionnaire, including selecting the questionnaire languages. **Note:** To add multiple languages don't forget to click in 'Add extra languages to the questionnaire' and select the languages via the available check boxes

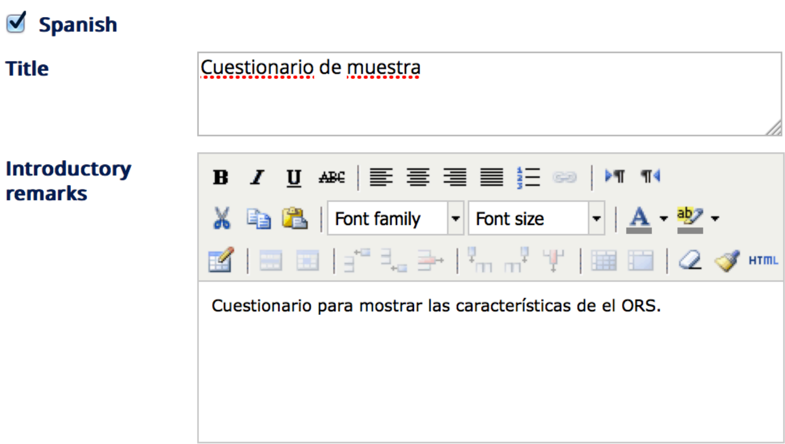


Figure 12 Adding an extra language

3. Fill in the extra information of the questionnaire;
4. Click on 'Add Questionnaire'

3.2.4 How to edit a questionnaire

1. Click on 'Manage Questionnaires' from the Administration Dashboard;

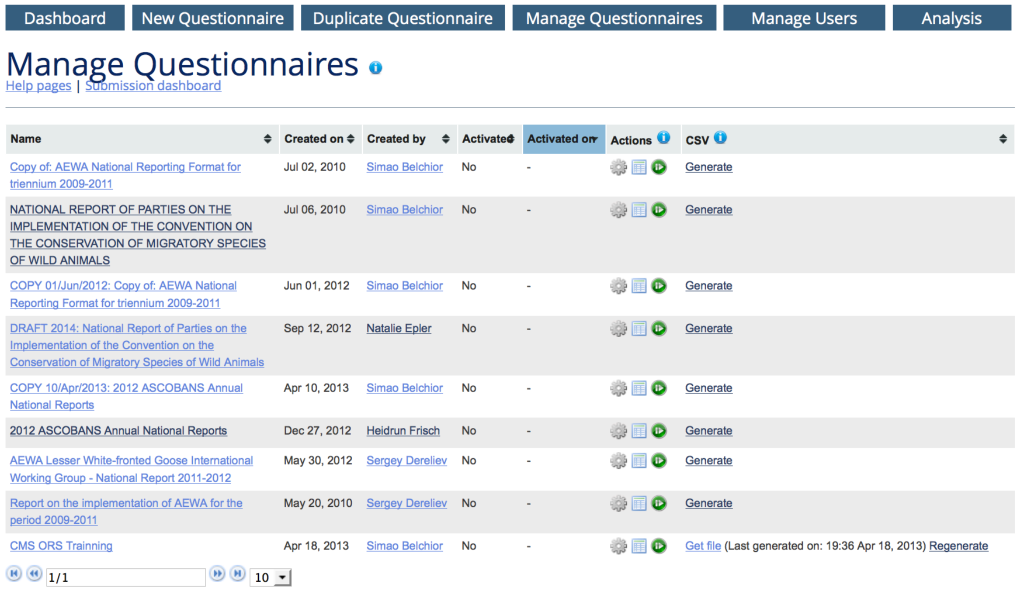


Figure 13 Manage Questionnaires

2. Find the questionnaire on the table of questionnaires (you can move to the next page by using the small arrows on the bottom left-hand side, otherwise you can increase the number of questionnaires displayed per page);
3. Click on the title of the questionnaire. This will take you to the questionnaire dashboard;
4. Hover your mouse over the secondary menu's leftmost option 'Manage Questionnaire' and click on 'Edit';

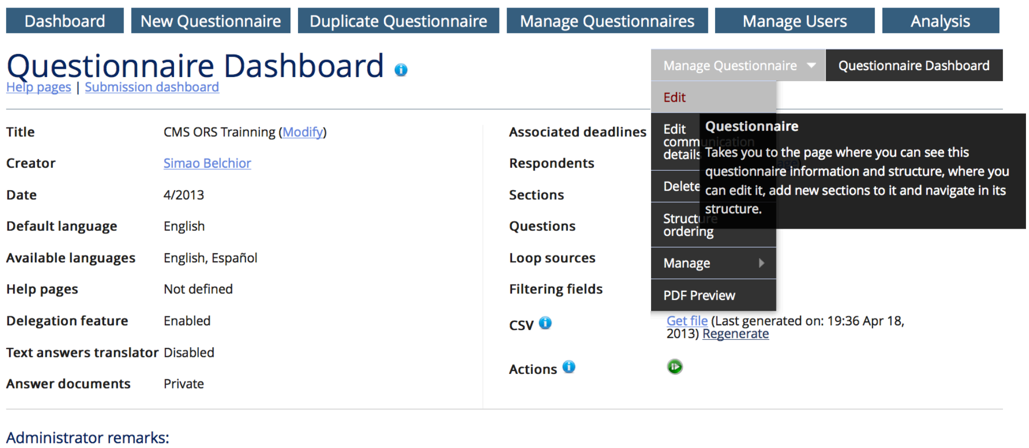


Figure 14 Questionnaire Dashboard – Edit Option

5. From the edit page you can see the questionnaire structure on the right and the questionnaire basic and extra info on the left. To edit this information you can click on the 'Edit Introduction' link

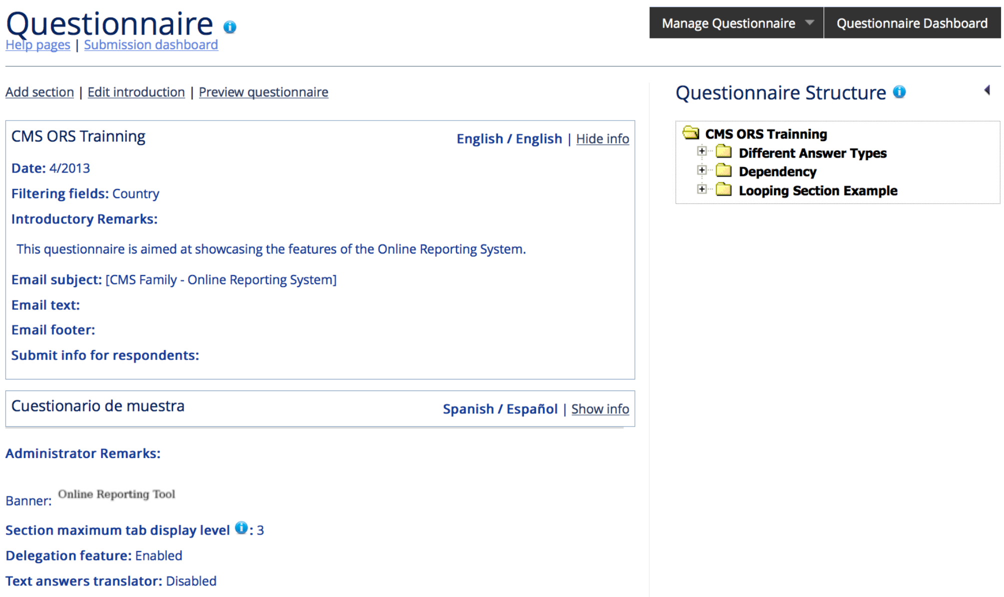


Figure 15 Questionnaire edit page

3.2.5 How to navigate the questionnaire structure

1. From the questionnaire edit page you can navigate between elements of the questionnaire by clicking on their icon in the tree structure on the right-hand side (the root folder represents the questionnaire basic information and configuration, the other folders represent sections and files represent questions);
2. Above the main administration menu there's also a breadcrumbs like element that represents the path to the current selected element in the questionnaire tree. You can navigate to the ancestor elements by clicking on their title in this element.

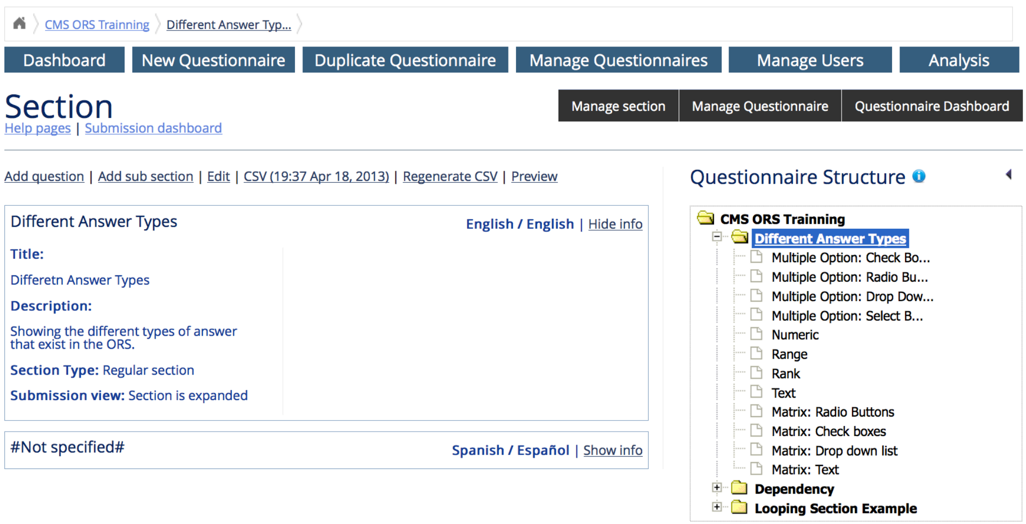


Figure 16 Navigating the tree structure

3.3 Sections

When adding a section, the following information can be entered:

- **Tab title,** the title displayed in the navigation menu on the left-hand side of the questionnaire's submission page;
- **Title,** the full title of the section;

- **Description,** any additional information on the section to assist respondents;
- **Is hidden**, if this option is selected the title and description of the section will not be displayed;
- **Starts collapsed**, if this option is selected the section's questions and sub-sections will start hidden, with the possibility of being expanded by the user;
- **Display in tab**, if this option is selected the section will be displayed in the questionnaire's navigation menu on the left-hand side of the questionnaire submission page. This option is always selected for root sections;
- **Section type**, one of three types: Regular, Same Answer and Looping.

Tab title, title and section type are mandatory fields that need to be filled in when creating a section. The three different section types are described below.

3.3.1 Regular

This is the default section.

3.3.2 Same Answer

This section type provides a quick way to build a section where all the questions will be of the same type. An example would be a section in which all the questions would be answered through a text field. By using a Same Answer type section the administrator only needs to define the answer type once, in the example case 'Text Answer', when creating the section. Each question added to the section would then inherit its answer type from the section.

3.3.3 Looping

This section type facilitates the creation of multiple sets of identical questions, for example if the same questions need to be asked about multiple different species or countries.

When creating a looping section you need to associate it with one column (known as a **loop item type**) in a table of entities about which the questions will be asked (known as a **loop source**). The looping section and its contained sections and questions will then repeat for all the records (known as **loop items**) in the chosen column of the table.

3.3.4 How to add a section

1. To add a section go to the questionnaire edit page and click on 'Add section' on the list of options just above the selected element details on the left hand-side of the main content area. **Note:** If the selected element is a section you should click on 'Add sub section' if you wish to add the new section as a child of the selected element;

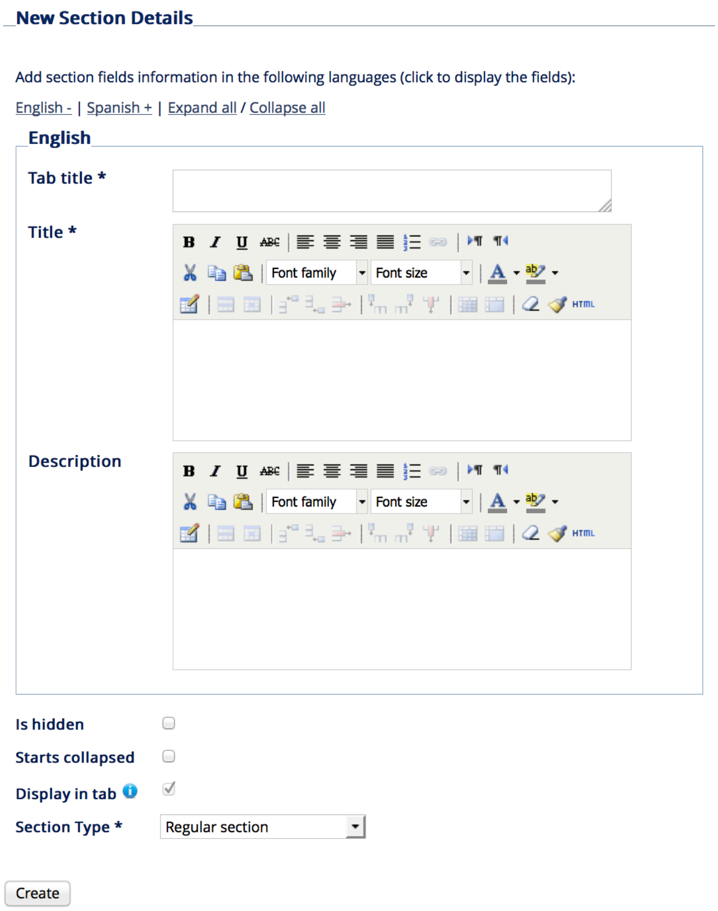


Figure 17 New section

2. Fill in the details of the section, including choosing the section type;
3. If adding a 'Same Answer Type' section:

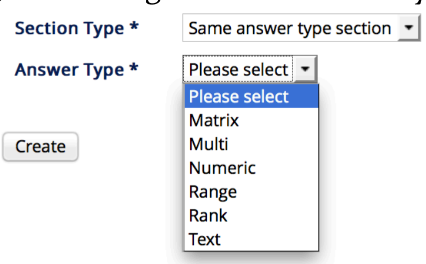


Figure 18 Same Answer Type section

   3.1. Choose the 'Answer Type' and fill in details. **Note:** details about the different answer types can be found below;
4. If adding a 'Looping' section:

Figure 19 Adding looping section

4.1. Select loop source;
4.2. Select the loop item type that should be associated with the new section. **Note:** Once a loop item type is selected a tag is added to the title of the section to represent it. This tag has the form of **#[LoopItemTypeName]**. In the submission page of the questionnaire this tag will be replaced with each of the available items of the selected type. The tag can be removed by ticking the relevant option. If the new section being added is descendant of a looping section that uses the same loop source, the loop item type selected has to be descendant of the ancestor's selected item type. The available item types are displayed in blue, unavailable types are displayed in red.

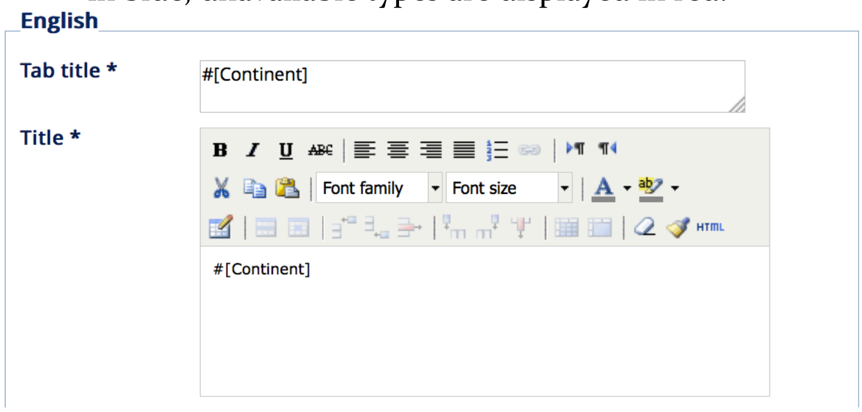


Figure 20 Detail of loop item type tag in a looping section

Figure 21 Country is the only loop item type available

5. Click on the ‘Create’ button to add the new section.

3.4 Question

For each question, information must be entered in the following fields:

- **Title**, the question text;
- **Short title**, a shorter string of text that could be used to identify a question;
- **Description**, any additional information regarding the question to assist respondents;
- **Is mandatory**, if this option is selected, respondents will not be able to submit the questionnaire until this question is answered;
- **Answer type**: one of six types: Matrix, Multiple Option, Numeric, Range, Rank, or Text.

Only the title and answer type are mandatory fields that must be filled in when creating a question.

The characteristics of each answer type are described below. Common to all the answer types is the **Help text** field that can be used to provide instructions regarding the expected format of an answer.

3.4.1 Matrix

This answer type presents the respondents with a table in which there are multiple questions (known in a matrix as ‘queries’) and multiple response options applicable to each question, such as ‘Yes’, ‘No’, ‘No information’.

There are four different options for presenting the response fields in a matrix:

- **Check boxes**, allowing the selection of more than one response option per query;
- **Radio buttons**, restricting the selection to one response option per query;
- **Drop down list**, providing a fixed set of possible responses for each field in the matrix;
- **Text field**, providing a text input box for each field in the matrix.

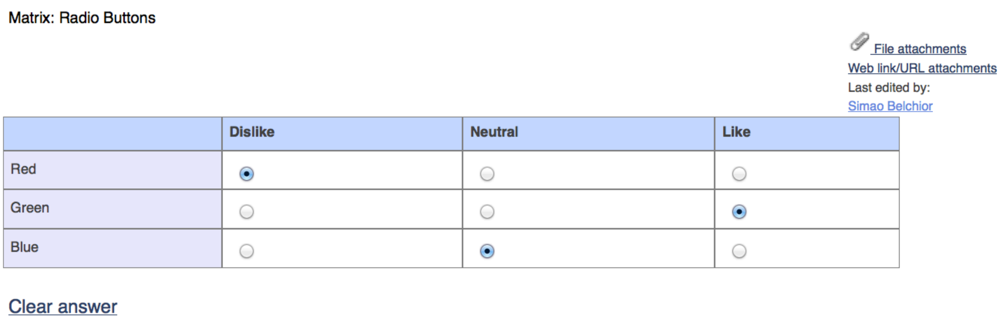


Figure 22 Matrix answer type from the submission page

When creating a question with a matrix answer type, information must be provided in the following fields:

- **Matrix orientation**, defines if the queries are displayed horizontally and the options vertically or vice versa;
- **Display reply**, select from one of Check Boxes, Drop Down List, Radio Buttons, and Text Field;

- **Queries**, text of the queries to pose to the respondents;
- **Options**, text of the options to cross with the queries defined;
- **Drop down list options**, options to be made available through the drop down list, in case this is the selected way to gather the respondents' responses.

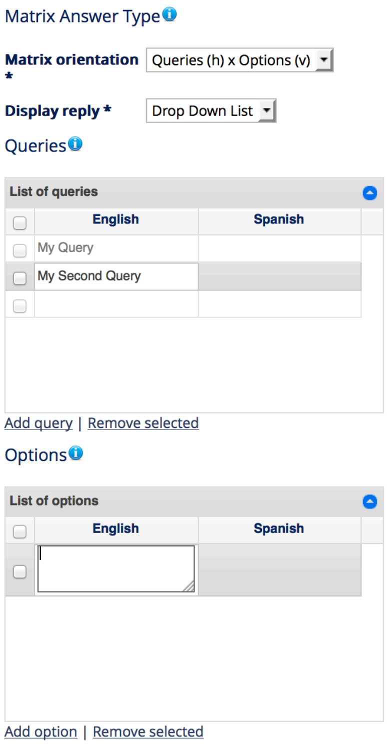


Figure 23 Adding a matrix answer

3.4.2 Multiple Option

This answer type provides the respondents with a fixed set of alternative responses to select from in order to answer a question. When creating a question with this answer type the following options are available:

- **Single selection**, when this option is enabled the respondent will only be able to select one response;
- **Display type**, specifies the way the options are displayed to the respondents. Can be either 'Drop down list/Multi select' or 'Radio buttons/Check boxes'. The former two types are available if the single selection option is enabled, otherwise the latter two types are available;
- **"Other" field is required**, if selected an extra option will be added as an alternative to the defined options. The label for this 'other' field can be customized.

Response options are then added in the order they should be displayed.

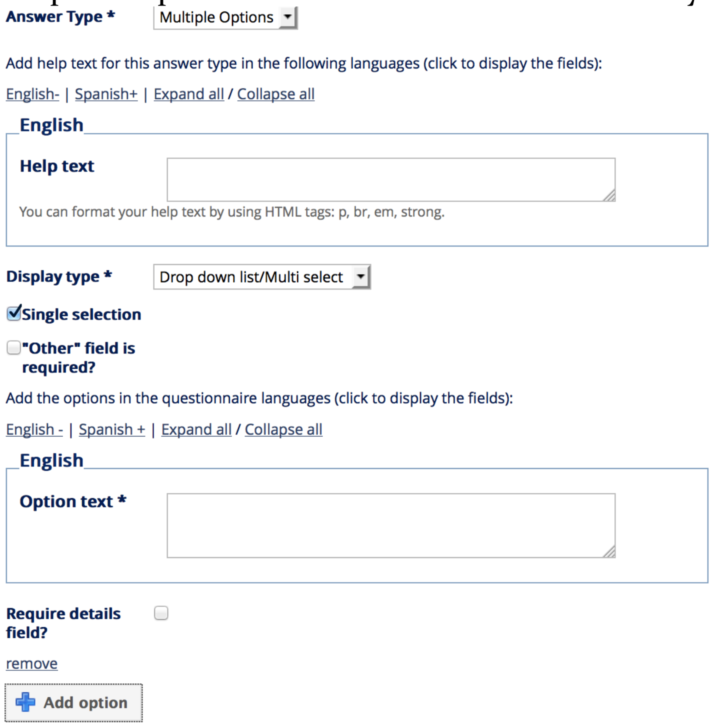


Figure 24 Adding a multiple option answer type

For each option a details field can be displayed, in case the users want to provide extra information about their selection.

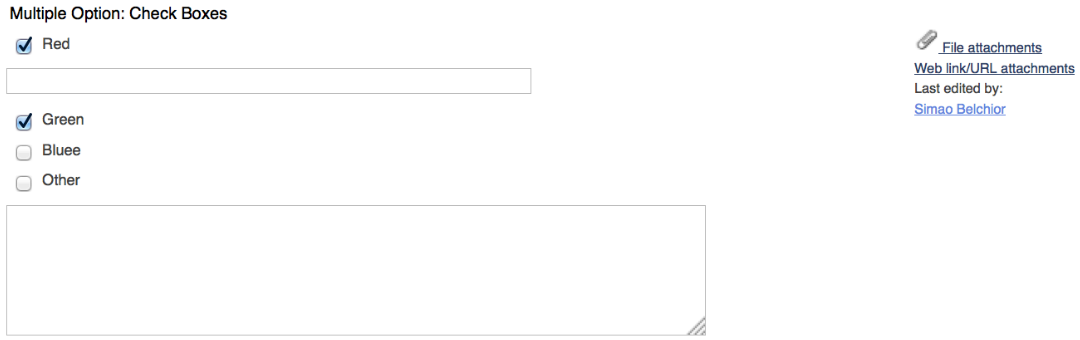


Figure 25 Multiple options answer type from the submission page with 'other' option and details field for option 'Red'

3.4.3 Numeric

This answer type allows only numeric answers; **Minimum** and **Maximum values** can be specified.

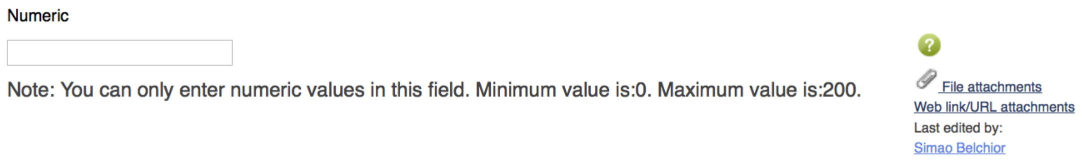


Figure 26 Numeric answer type from the submission page

3.4.4 Range

This answer type is a special case of a multiple option answer with radio buttons, in which there is a direct relation between the different response options. An example of a range type question would be: “How many times a week do you visit this website?”; with 0, 1, 1-10 and 10-20 as possible options. The direct relation between the different options would allow an analysis of the responses to this question to identify, for example, how many respondents visit this website less than 10 times a week. The different response options must be entered in the correct order to allow this type of analysis.

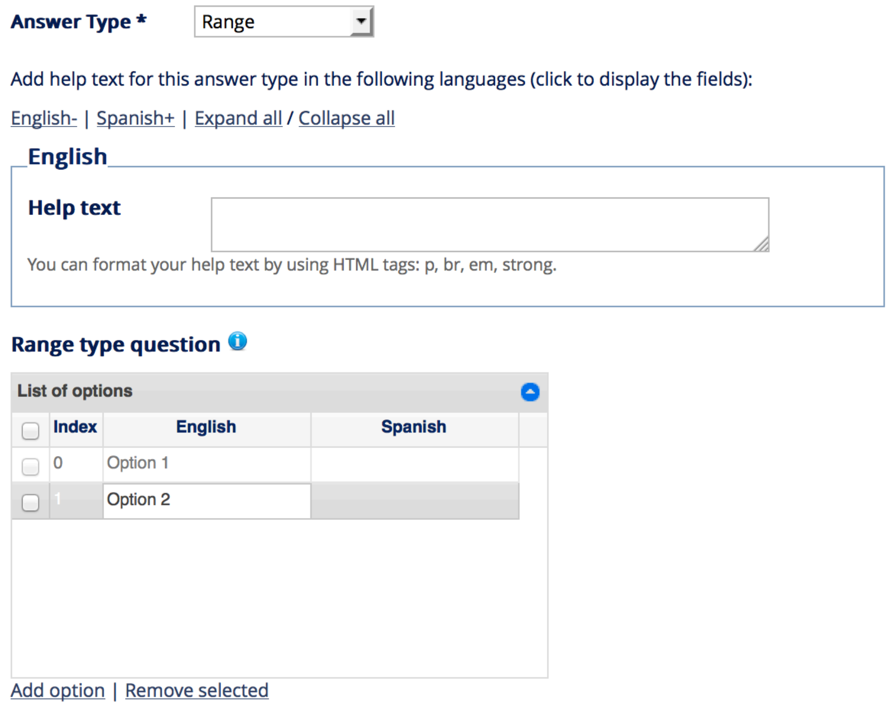


Figure 27 Adding a range answer type

3.4.5 Rank

This answer type prompts the respondents to sort a provided set of response options in their preferred order. A limit may be applied to the number of response options that each respondent can select; the default option is -1, indicating that any number of options can be selected.

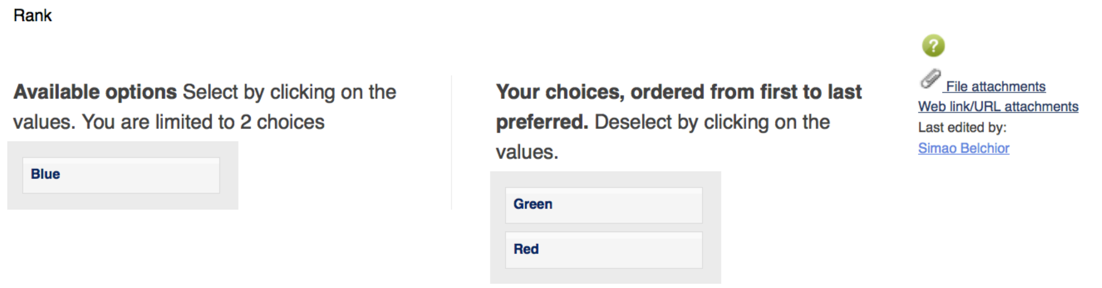


Figure 28 Rank answer type from the submission page

3.4.6 Text

This answer type is for open text responses. The number of **rows** and the **width** of the input field can be specified. The ORS allows for multiple input fields to be added.

3.4.7 How to add a question

1. Visit the questionnaire edit page;

2. Select a section from the questionnaire tree;
3. Select 'Add question' from the links above the section details on the left-hand side;

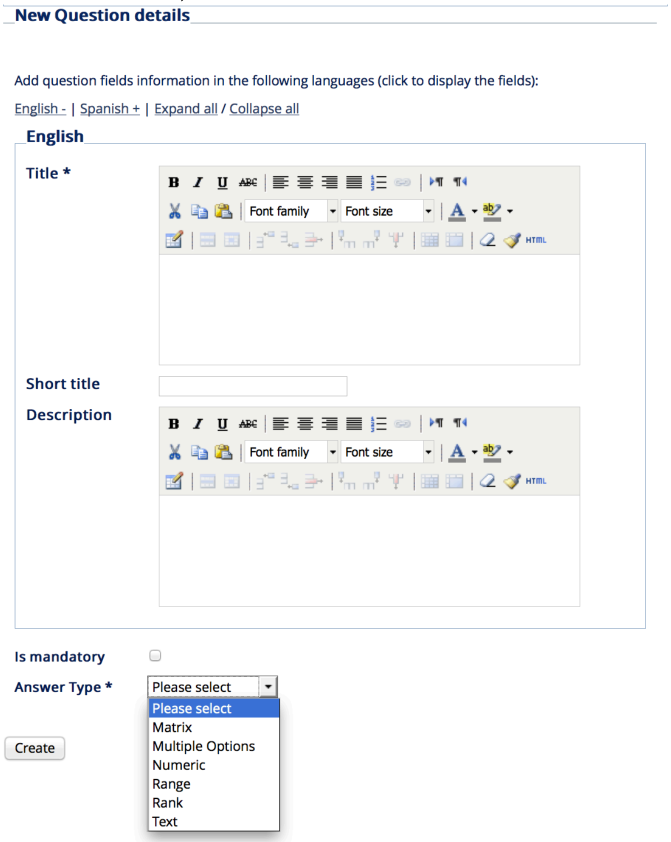


Figure 29 New question

4. Fill in the necessary details, including answer type and respective configuration;
5. Click on 'Create'

3.5 Dependent section

A section may be created to contain questions that should only be displayed if one or more specific values of a multiple option question are selected, or not selected, by the respondent. For example, if a user answers 'yes' to a given multiple option question, a further question such as 'Please provide further details' is then displayed. This is achieved by defining a section dependency conditions. Any section can be made dependent but there are some constraints that need to be taken into consideration:

- A section cannot depend on its own or its descendants' questions;
- A section can only depend on looping sections' questions, if the looping section is an ancestor of the dependent section;
- A section can only depend on Multi Answer questions.

3.5.1 How to define a dependent section

1. Go to the questionnaire edit page;
2. Select the section that depends on another answer from the questionnaire tree structure;

3. Hover over the black sub menu's item 'Manage Section' and then click on the 'Define dependency' menu item;

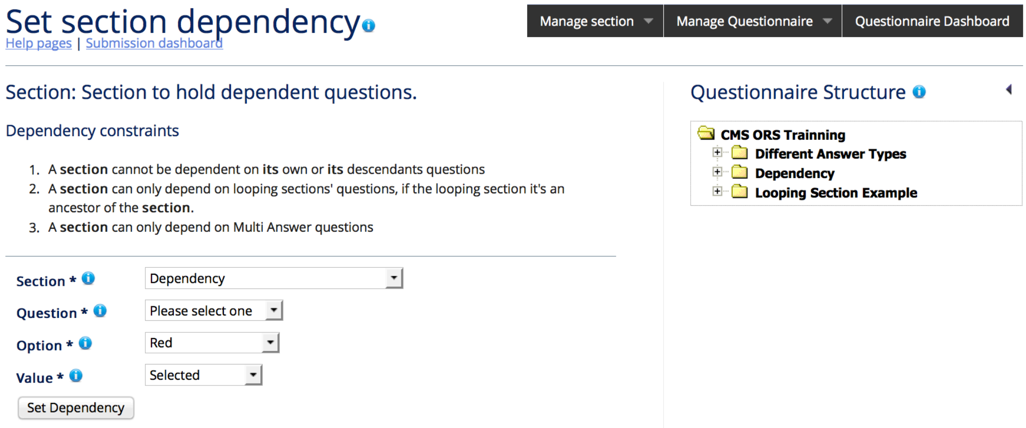


Figure 30 Define dependency

4. Fill in the dependency details, by selecting the section, question, option, and if the option should be selected or not;
5. Click on 'Set Dependency'.

3.6 Structure Ordering

When adding new sections and questions to a questionnaire these will be displayed in the order in which they were created. If for any reason some re-ordering is required after the questionnaire has been created, the ORS provides a tool to enable this. To ensure the integrity of the questionnaire structure the following rules apply:

- The root node cannot be moved, as it represents the questionnaire and not an actual section
- All objects can be re-ordered with their siblings
- Questions must be contained within sections and therefore cannot be moved to the root of the tree
- Questions with loop item types or extra information regarding loop items associated with them cannot be moved to another section
- Sections cannot be moved if they are of looping type
- Sections cannot be moved if they have extra information regarding loop items associated with them
- Sections cannot be moved inside their own sub-sections.

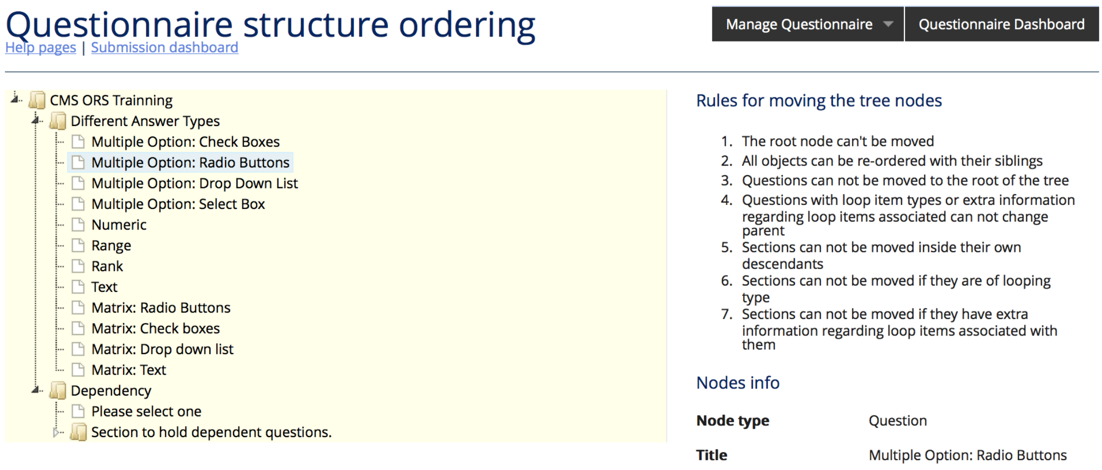


Figure 31 Questionnaire structure ordering

3.6.1 How to access the structure-ordering feature

1. From the questionnaire management pages hover over the context menu's 'Manage Questionnaire' option and select 'Structure ordering' from the drop down menu.

4 Managing a Questionnaire

This section covers more advanced aspects of managing a questionnaire, including managing its respondents, loop sources, and languages. These features are available from the Administration Dashboard.

4.1 Questionnaire Dashboard

In the questionnaire dashboard the following information is displayed:

- **Title,** the title of the questionnaire;
- **Creator**, the user that created the questionnaire;
- **Date**, the month and year in which the questionnaire was created;
- **Duplicates**, a list of any questionnaires that have been added as duplicates of the current questionnaire;
- **Default language**, the default language in which the questionnaire is displayed;
- **Available languages**, list of available languages in which the questionnaire may be displayed;
- **Help pages**, link to the questionnaire's help pages, if available;
- **Delegation feature**, specifies where this feature is enabled or not;
- **Text answer translator**, specifies where this feature is enabled or not;
- **Answer documents**, specifies whether documents attached to answers are public or not;
- **Associated deadlines**, number of deadlines associated with the questionnaire and a link to manage those deadlines;
- **Respondents**, number of respondents authorized to fill in the questionnaire and a link to manage those respondents. It also includes a link to the 'Questionnaire Summary Page' where information regarding the statuses of respondents' responses is displayed;

- **Sections**, total number of sections in the questionnaire,
- **Questions**, total number of questions in the questionnaire,
- **Loop sources**, number of loop sources associated with a questionnaire and a link to manage these;
- **Filtering fields**, number of filtering fields associated with a questionnaire and a link to manage these (filtering fields will be covered further ahead in this guide).
- **CSV**, link to generate a CSV file with all the respondents' responses to the questionnaire. Once the CSV has been generated it can be immediately downloaded or regenerated at any time;
- **Actions**, link to manage the status of the questionnaire (open, closed, locked).

4.2 Manage Respondents

This page is where an administrator can select from the existing respondents in the system those, which should have access to a given questionnaire. From this page the administrator can also add new users to the system, either one by one or by uploading a CSV file with a list of users.

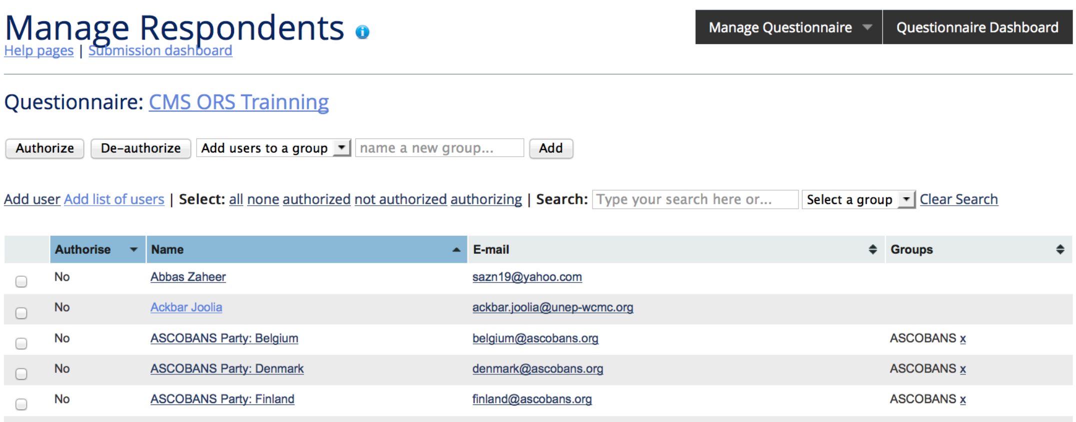


Figure 32 Manage respondents

4.2.1 How to authorize a respondent

1. Visit the questionnaire dashboard;
2. Hover over the context menu's 'Manage Questionnaire' option, hover over 'Manage' and select respondents from the drop down menu;
3. Select the respondent that you want to authorize and click on the authorize button. **Note:** You can authorize more than one respondent at a time. You can filter down the list of respondents by using the 'Select' filters, the search box or by selecting a group to filter by.

4.3 Responses Summary

This page shows the list of the respondents which have been authorized to access a given questionnaire as well as the current status of their questionnaire. From this page the administrator can email all the respondents of the questionnaire to provide them with any relevant information.
If a respondent has already submitted a questionnaire but has requested that its submission be reverted (this option is available to respondents on the

questionnaire submission page), the administrator will be able to revert the submission from this page..

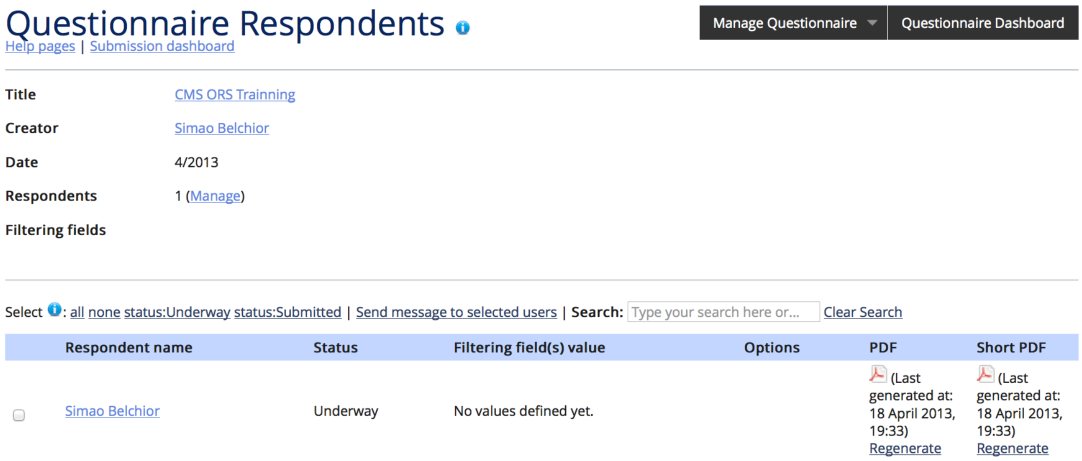


Figure 33 Questionnaire summary page

4.3.1 How to access the summary page

1. Visit the questionnaire dashboard page;
2. Select 'Summary' right of the 'Respondents' item in the dashboard.

4.3.2 How to email a group of respondents

1. Visit the summary page;
2. Select the users that you wish to email;
3. Click on the 'Send message to selected users' link;

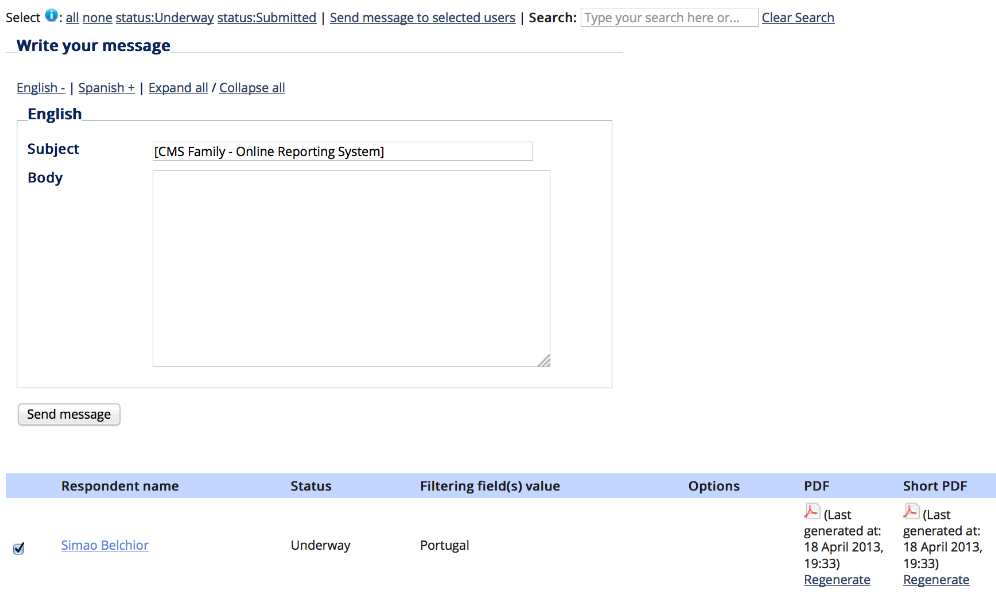


Figure 34 Email respondents

4. Fill in the email details;
5. Click on 'Send message'.

4.4 Managing Languages

From this page the administrator can change the questionnaire's available languages, including the default language. If a language is removed from the questionnaire all data that has previously been input in questionnaires displayed in that language will be lost.

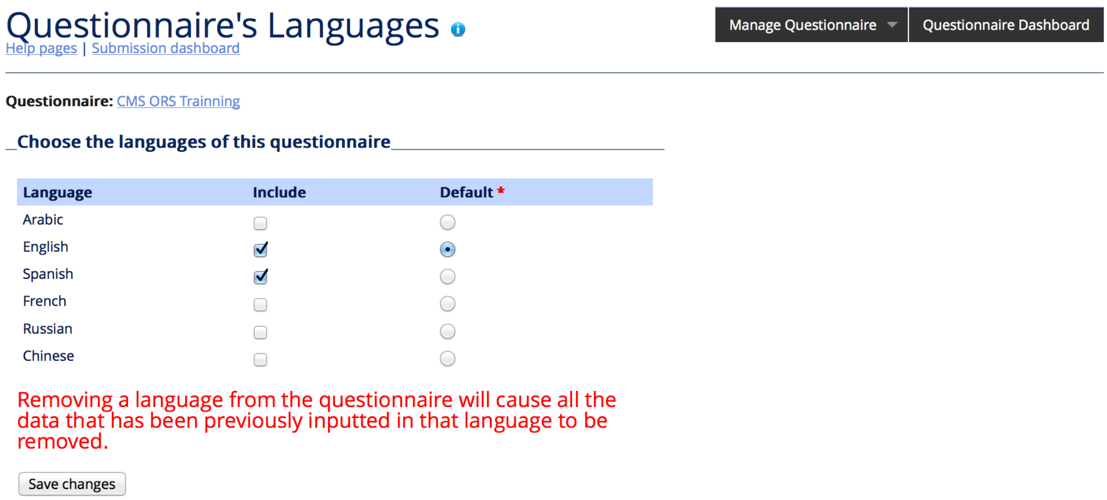


Figure 35 Manage questionnaire languages

4.4.1 How to access the manage languages page?

1. Visit the questionnaire dashboard page;
2. Hover over the context menu's 'Manage Questionnaire' option, hover over 'Manage' and select 'Languages' from the menu;

4.5 Loop Sources

As explained above, a looping section provides a quick way to ask the same set of questions about a group of entities. These entities are grouped by type and are part of a table that is known as a 'loop source'.
The following table is an example of a loop source:

Region	Country
Europe	Portugal
Europe	Germany
South America	Brazil

Each column header corresponds to a **loop item type** and each of the records in that column is a **loop item**. Europe and South America would be loop items of type Region; and Portugal, Germany, and Brazil would be loop items of type Country. The columns of a loop source should be hierarchically organized, with the column on the left being the parent column of the column on the right. The same is true for the organization of the loop items. This means that in our example Country is a child of Region, and therefore Portugal is a child of Europe. In our example we could have two nested looping sections with the parent section iterating over Region and the child section iterating over Country, as seen in the following screenshot.

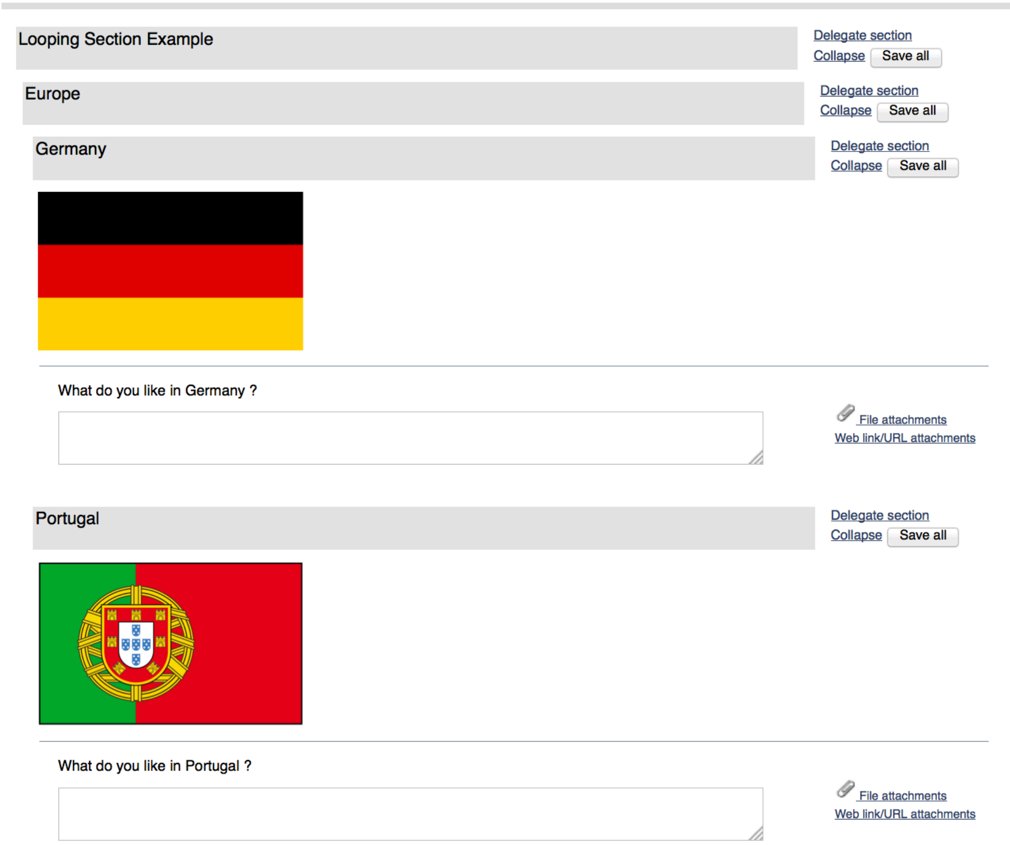


Figure 36 Example of nested looping sections

4.5.1 Filtering Fields

Filtering fields enable respondents to be prompted to answer only questions about particular entities in a loop source that are relevant to them. A filtering field is associated with one loop item type of a given loop source. When a filtering field is created, the system will add an extra field to the profile of each respondent of that questionnaire, which can then be associated with the relevant loop item for that respondent. Returning to the above example, if the filtering field was associated with the item type Country and the respondent had it set to Portugal, the respondent would not be prompted to fill in any questions about Germany.

4.5.2 Extra information for loop items

The ORS allows the association of extra information with each loop item. The information to be associated can be a URL, a string of text or a link to an image. In Figure 36 the Portuguese and German flags have been added as extra information for the respective loop items.

4.5.3 How to add a loop source

1. Compile your loop source in the correct format;

Loop sources

A loop source can be either a single column table or a set of related single column tables. The headers of each of the columns that compose a loop source are defined as **loop item types**, and the elements of each column are defined as **loop items**.

To create a loop source you will need to upload a **CSV** file with the different columns that compose the source. The system will assume an hierarchy from the left to the right.

- To add **translations** for loop source items, click on Show next to the loop source name.

Example

So if for instance you have a column named **Continent** and a column named **Country**, the column **Continent** should come first on your **CSV** file. This hierarchy will then be applied to the elements of each column. So if you have three countries to add, like **Portugal**, **England** and **Brazil**, you will need to have a file like the following.

#Continent, Country

Europe, England

Europe, Portugal

South America, Brazil

The first line of the file is always the headers' line and should have the character **#** as the first character.

In this example **Continent** and **Country** would be the **loop item types** of the source and **Europe**, **South America**, **England**, **Portugal** and **Brazil** would be loop items, with the first two being of the type **Continent** and the last three of type **Country**. An hierarchy would also be defined with **Country** belonging to **Continent**. It is also important to note that even though **Europe** shows up twice in the file, it will not be duplicated in the system, but will have two descendants, **Portugal** and **England**

Figure 37 Loop source guidance

2. Go to the questionnaire dashboard page;
3. Follow the 'Manage' link by the 'Loop sources' section of the dashboard;
4. Click on 'New Loop Source';

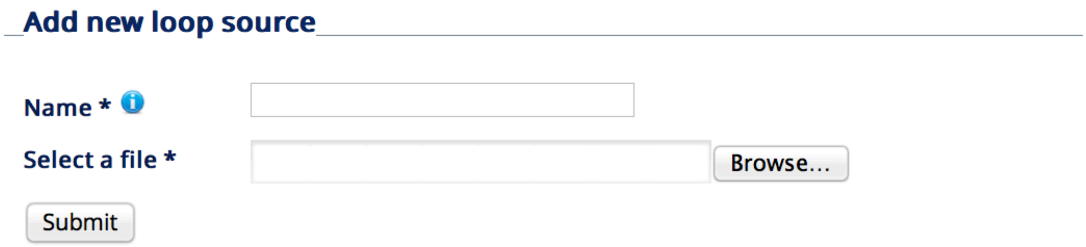


Figure 38 Add a loop source

5. Choose a name for the loop source and select a file from your computer;
6. Click on "Submit". **Note:** After adding the loop source you will be taken back to the questionnaire's list of loop sources. The import of the loop source happens in a background job, but once it is ready you will be able to see it in this page.

Name	Loop item types	Used in sections	
Geo Source	Continent > **Country**	2	Show | Remove

Figure 39 Successfully added loop source

4.5.4 How to add extra details to loop items

1. Go to the questionnaire's loop sources page, via the questionnaire dashboard;
2. Select a loop source by clicking on the 'Show' link next to it;

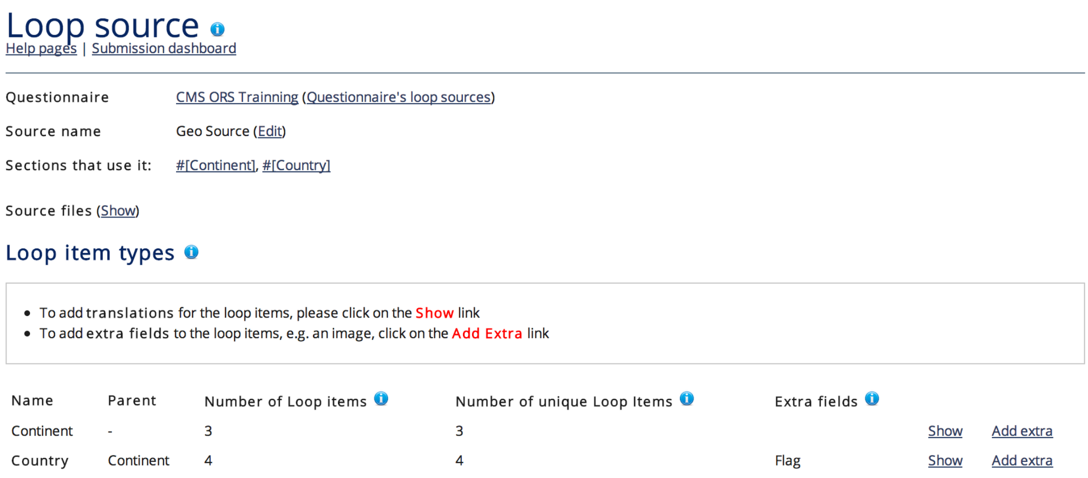


Figure 40 Loop sources details

3. Click on the 'Add extra' link for the loop item type that you wish to add an extra to;

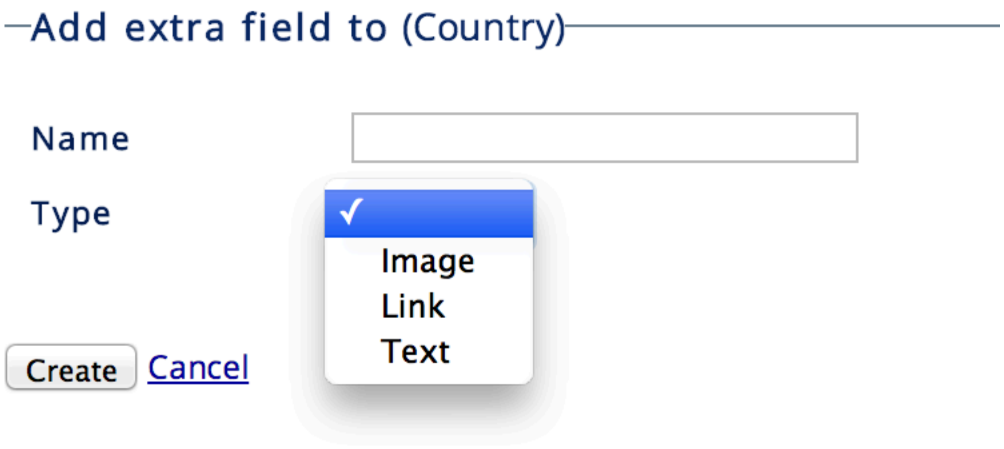


Figure 41 Add extra field to loop item type

4. Fill in the name of the extra and choose the type;
5. Click on the 'Create' button; After the extra is created you are taken to the loop item type page;

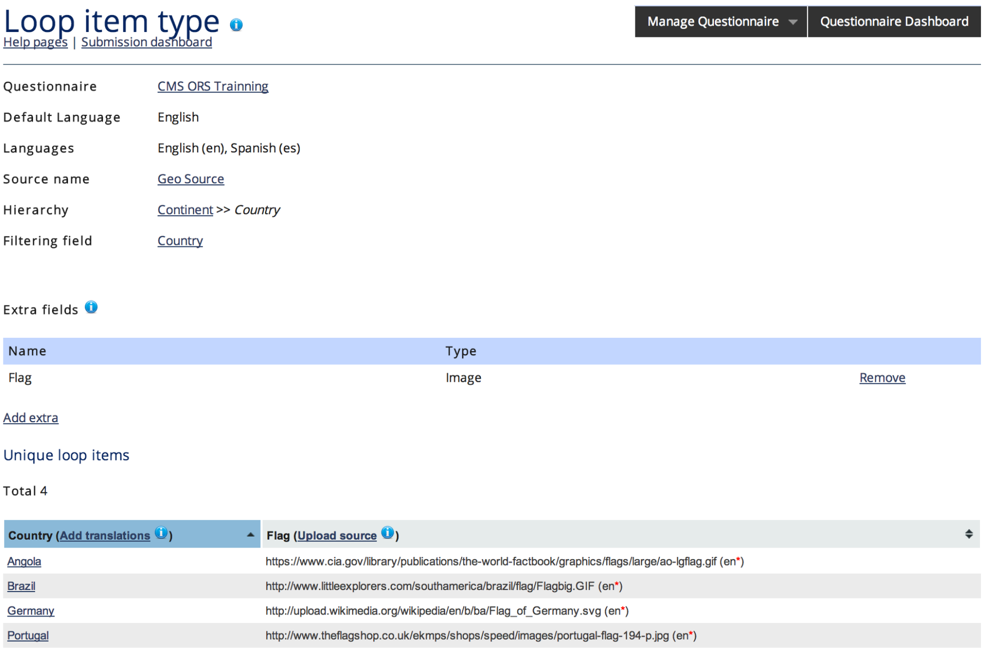


Figure 42 Details of a loop item type, including list of loop items

6. Add the extra information for each loop item by clicking on the 'Upload source' link next to the extra field added (e.g.: 'Flag' in Figure 40);
7. Select the file with the information and upload it. **Note:** Instructions on how to format the source file can be found in the tooltip next to the extra field.

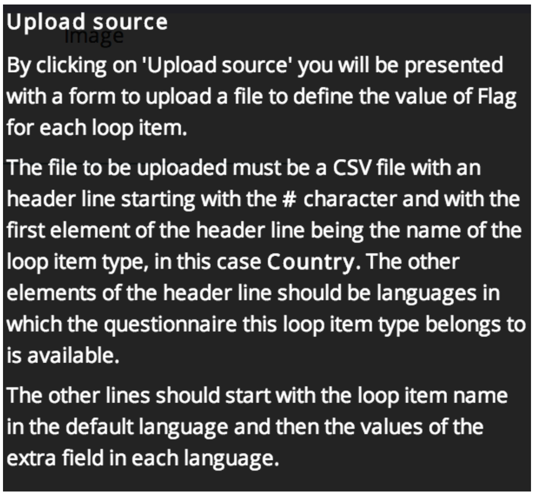


Figure 43 Instructions on how to format an extra field source file

8. This extra field will then be available to be used in the description of any looping section that loops through 'Country', as shown in the following Figure.

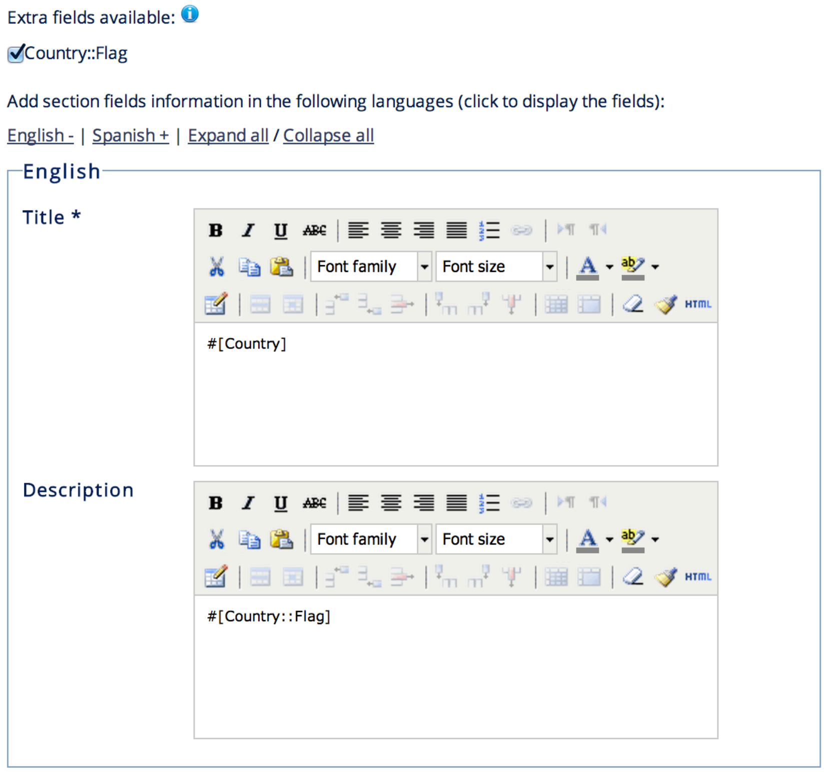


Figure 44 Using extra fields in a section's description

4.6 Communication Details

In this page, text can be entered for the email subject and body for any automatic communication regarding the questionnaire, e.g.: when a user is authorized to access one questionnaire he will get an automatic email with that information.

4.6.1 How to access the communication details page

1. Visit the questionnaire dashboard page;
2. Hover over the context menu's 'Manage Questionnaire' option;
3. Select 'Edit communication details' item from the drop down menu;

4.7 Deadlines

An administrator can add deadlines to a given questionnaire. Currently these deadlines are not enforced in any way by the system; they are simply there to inform the respondents.
When adding a deadline an administrator can choose a title for the deadline, a due date, and select whether it is a hard or soft deadline (currently, only the soft option is available).

4.8 Questionnaire Statuses

A questionnaire can be in one of three statuses:

- **Started**, in this state the questionnaire is accessible to respondents to fill in their responses, and administrators cannot make any amendments to it;
- **Stopped**, in this state the questionnaire is not accessible to respondents, and amendments can be made by the administrators;
- **Locked**, in this state no edits can be made or responses added to the questionnaire.

These status can be managed from the questionnaire dashboard.

4.8.1 How to Start, Stop, and Lock a questionnaire

1. Visit the questionnaire dashboard;
2. Select the appropriate action from the 'Actions' section of the dashboard, by clicking on the corresponding icon:
   - : start;
   - : stop; and
   - : lock.
3. The unlock action is only available from the 'Manage Questionnaires' page (click on the link from the main menu);
   - : unlock.

4.9 Exporting Data

The ORS provides two different formats in which to extract respondents' responses.

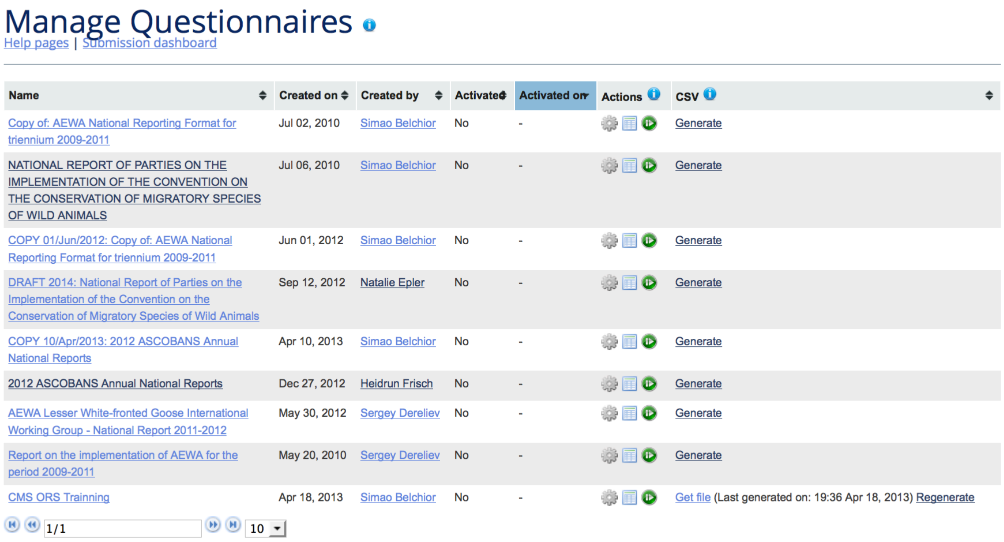
4.9.1 PDF

For each respondent a PDF can be generated as either a long and short PDF. The long PDF includes all the questions in the questionnaire regardless of whether the respondent has provided an answer. The short PDF contains only those questions the respondent has answered.
How to generate a PDF

4.9.2 CSV

The other available format is a CSV file. In this output, all of the respondents' answers to all questions are included in the same file. It is also possible to generate a CSV file for a specific section of the questionnaire, reducing the size and the time taken to generate the file.
How to generate a CSV file of the whole questionnaire

1. Visit the 'Manage Questionnaires' page;
2. Find your questionnaire;
3. Click on 'Generate' on the corresponding line under the 'CSV' column;



Manage Questionnaires

Help pages | Submission dashboard

Name	Created on	Created by	Activated	Activated on	Actions	CSV
Copy of: AEWA National Reporting Format for triennium 2009-2011	Jul 02, 2010	Simao Belchior	No	-		Generate
NATIONAL REPORT OF PARTIES ON THE IMPLEMENTATION OF THE CONVENTION ON THE CONSERVATION OF MIGRATORY SPECIES OF WILD ANIMALS	Jul 06, 2010	Simao Belchior	No	-		Generate
COPY 01/Jun/2012: Copy of: AEWA National Reporting Format for triennium 2009-2011	Jun 01, 2012	Simao Belchior	No	-		Generate
DRAFT 2014: National Report of Parties on the Implementation of the Convention on the Conservation of Migratory Species of Wild Animals	Sep 12, 2012	Natalie Epler	No	-		Generate
COPY 10/Apr/2013: 2012 ASCOBANS Annual National Reports	Apr 10, 2013	Simao Belchior	No	-		Generate
2012 ASCOBANS Annual National Reports	Dec 27, 2012	Heidrun Frisch	No	-		Generate
AEWA Lesser White-fronted Goose International Working Group - National Report 2011-2012	May 30, 2012	Sergey Dereliev	No	-		Generate
Report on the implementation of AEWA for the period 2009-2011	May 20, 2010	Sergey Dereliev	No	-		Generate
CMS ORS Trainning	Apr 18, 2013	Simao Belchior	No	-		Get file (Last generated on: 19:36 Apr 18, 2013) Regenerate

1/1 10

Figure 45 Manage questionnaires - generate CSV

4. Once the file is generated you will receive an email from the ORS to inform you;
5. You can then come back to the 'Manage Questionnaires' page and download the CSV file by clicking on 'Get file' under the CSV column.

How to generate a CSV file of a section

1. Visit a questionnaire's edit page;
2. Navigate to the desired section via the questionnaire tree structure;
3. Click on the link 'Generate CSV' (or 'Regenerate CSV' if it has been generated previously);
4. Once the file finishes generating you will receive an email from the ORS to inform you;

Figure 46 Section CSV generation

5. You can then come back to the section and download the file by clicking on 'CSV (date of creation)'.

4.10 Questionnaire Duplication

The ORS provides a feature to duplicate existing questionnaires. This can be very useful in the case of annual/biennial/triennial questionnaires where the questionnaire format does not change much from year to year. After the duplicate questionnaire has been created, changes to its structure can be made as to any other questionnaire.

One option available when duplicating a questionnaire is to also copy the responses of the questionnaire's respondents, so that each respondent would only have to amend their previous responses rather than starting from scratch.

4.10.1 How to duplicate a questionnaire

1. From the administration dashboard click on the 'Duplicate Questionnaire' link from the main menu;
2. Select the questionnaire that you wish to duplicate;

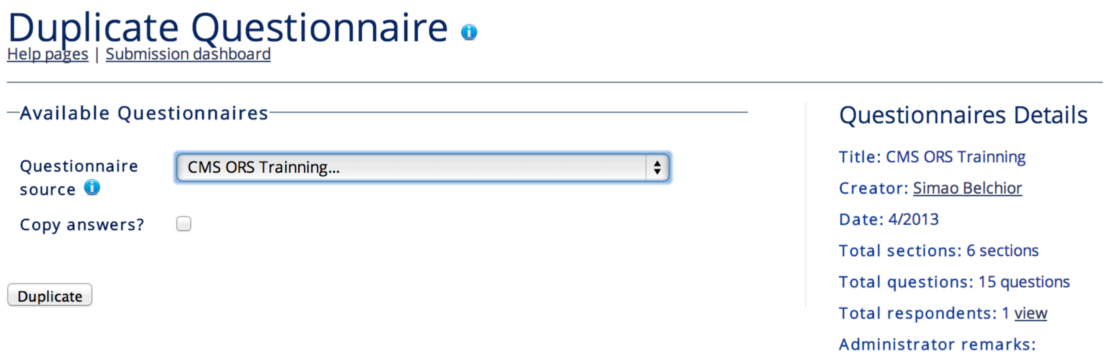


Figure 47 Duplicate a questionnaire

3. Select if you wish to copy the answers over to the new questionnaire;
4. Click on the 'Duplicate' button;
5. The questionnaire duplication will occur in the background and one email will be sent to you when it has been finished.

5 Submission dashboard

5.1 Introduction

This section covers the features available in the questionnaire's submission dashboard.

5.2 Questionnaire Submission

5.2.1 Submission page

The submission page of a questionnaire consists of two main sections: the navigation menu on the left hand-side and the content area in the centre and right hand-side of the page.

5.2.1.1 Navigation menu

The first tab in the navigation menu links back to the initial submission page where the basic information of the questionnaire is displayed in the content area. The other tabs link to each section of the questionnaire, with the root sections being displayed by default. Other sections can also be displayed in the navigation menu by selecting the appropriate option when creating the questionnaire.

Status icons are displayed on the right-hand side of each tab in the navigation menu, providing information on the completeness of that particular section. The different possible statuses are:

- New section
- No answers added
- Mandatory questions missing
- All mandatory questions answered
- All questions answered

5.2.1.2 Content area

When a respondent accesses the submission page of a questionnaire, the content area displays the basic details of the questionnaire, including title, introductory remarks and the languages of the questionnaire. From here, respondents can change the language in which the questionnaire is displayed. When a respondent navigates to a section, the content area displays that section and all sections and questions contained within it.
On the right-hand side of each tab in the navigation menu, there is a collapse/expand icon that hides or displays that section's contained components.

5.2.2 How to save responses

A respondent's answers can be saved by clicking on the 'Save all' button inside each section. An auto-save feature also saves any changed responses every thirty seconds, and whenever a user moves between sections.

5.2.3 Submitting a Questionnaire

Respondents can submit a questionnaire if they have replied to all of the questionnaire's mandatory questions. Once they have submitted the questionnaire the administrators of the questionnaire will be notified of the submission.
Once the questionnaire has been submitted the respondent will not be able to return to that questionnaire's submission page, unless they request the submission to be reverted (see below).

5.2.4 How to submit a questionnaire

1. Go to the questionnaire submission page by clicking on the questionnaire title from the submission dashboard;
2. Make sure you have answered all the mandatory questions;
3. Click on the 'Submit Questionnaire' button on the top right-hand side;
4. Confirm submission.

5.2.5 How to generate a PDF from the submission dashboard

1. Go to the submission dashboard;
2. Click on the 'Generate' (or 'Regenerate' if you have previously generated a PDF and want a newer version) link on the right hand-side of the available questionnaires table. **Note:** 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.
3. The PDF will be generated in a background job and the ORS will email you once it has finished generating it.

4. You will then be able to download it from the same page by clicking on the corresponding PDF icon.

CMS ORS Trainning	Simao Belchior	18 April 2013	Underway	(Last generated at: 18 April 2013, 19:33) Regenerate	(Last generated at: 18 April 2013, 19:33) Regenerate

Figure 48 Detail of generated PDF

5.2.6 Revert Submission

If a respondent wishes to return to a submitted questionnaire to make any edits to the answers, it can request that the administrator revert its submission.

5.3 Managing Delegates

5.3.1 Delegates

The delegation feature allows a respondent to delegate either all or part of a questionnaire to another user. Each respondent can manage its own delegates and choose which questionnaires or sections of questionnaires each delegate should have access to.

5.3.2 Delegate a Questionnaire

If a questionnaire's delegation feature is enabled, each respondent can delegate the whole or part of a questionnaire to its delegates. By delegating the questionnaire, the respondent's delegates will be able to access the questionnaire in the same way as the respondent and see all the existing responses. If they have only been delegated certain sections, they will not have access to the remaining sections; these section's questions will be marked with a red border.
In the submission page of a questionnaire the respondent will be able to see which user has last edited any of the existing responses, and can therefore monitor progress by delegates.

5.3.3 How to add a delegate

1. Go to the 'delegation dashboard' by clicking on the link on the context menu on your 'submission dashboard';
2. Click on the 'Add delegate' link on the context menu;
3. Fill in the delegate email, name and preferred language

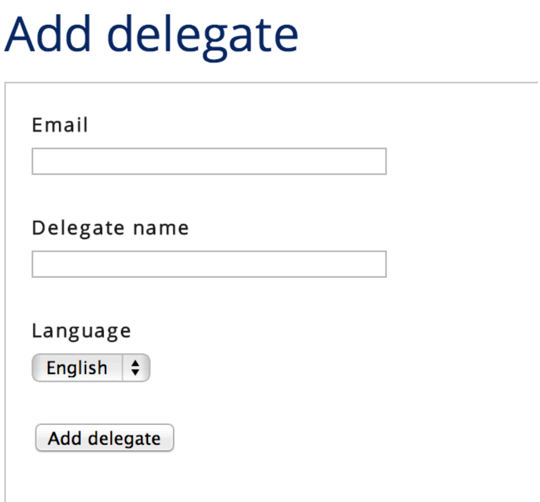


Figure 49 Add delegate

4. Click the 'Add delegate' button. The user will be notified by email that you have added him as a delegate.

5.3.4 How to delegate a questionnaire

1. Go to your delegation dashboard;
2. Select one of your delegates by clicking on the 'Show' link in the options column;
3. Click on the 'Delegate questionnaire' link;

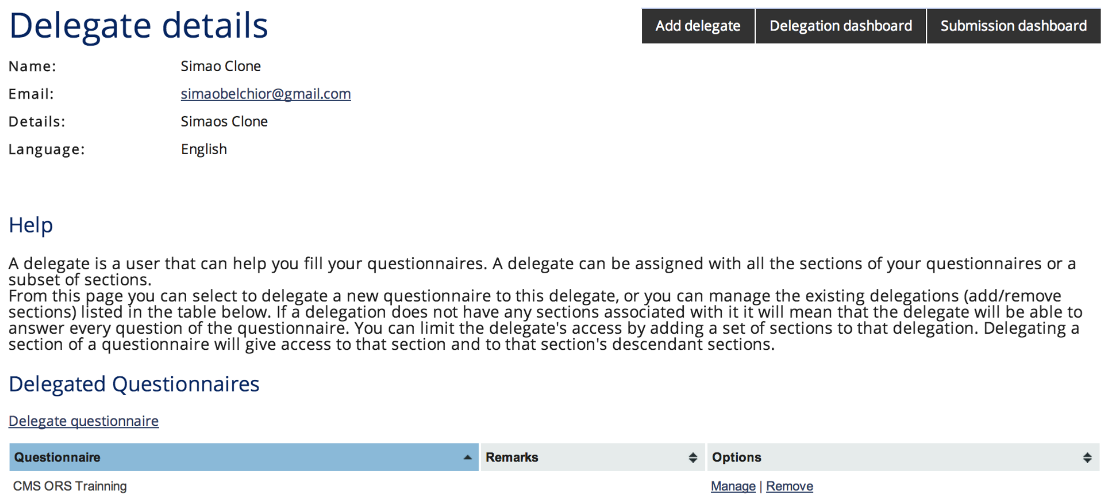


Figure 50 Delegate details

4. Fill in the form details;

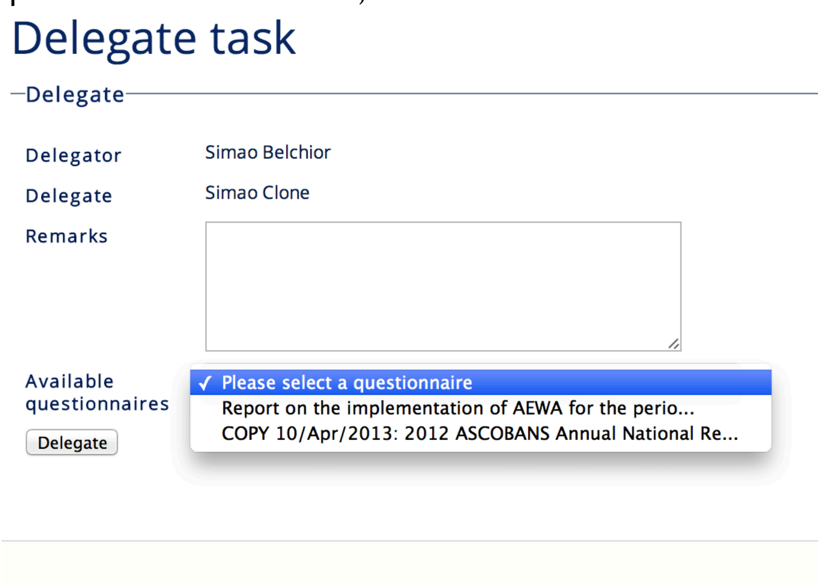


Figure 51 Delegate questionnaire

5. Click on the 'Delegate' button. The delegate will receive an email regarding the delegation of the questionnaire.

5.3.5 How to delegate a section

Sections can be delegated directly from the submission page of the questionnaire, as long as you have defined a delegate.

1. Go to the questionnaire submission page;
2. Select a section from the navigation menu;

3. Click on the ‘Delegate section’ link next to a setion;

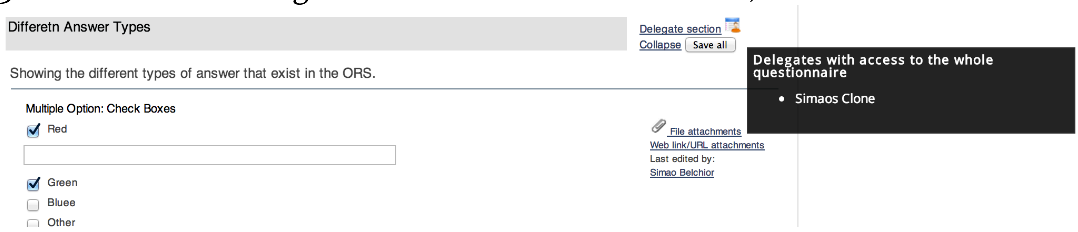


Figure 52 Delegate link and list of current delegates associated with questionnaire

4. Select the delegate to whom you wish to delegate the section;

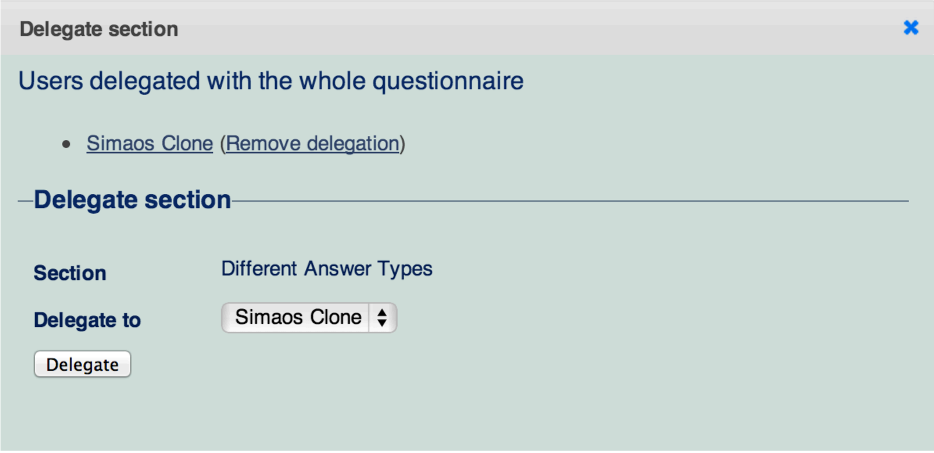


Figure 53 Section delegation form

5. Click on the ‘Delegate’ button.

Alternatively sections can be added directly to an existing delegation.

1. Go to your ‘delegation dashboard’;
2. Select a delegate by clicking on the ‘Show’ link by their details;
3. Select the delegation you want to add sections to, by clicking on the ‘Manage’ link;

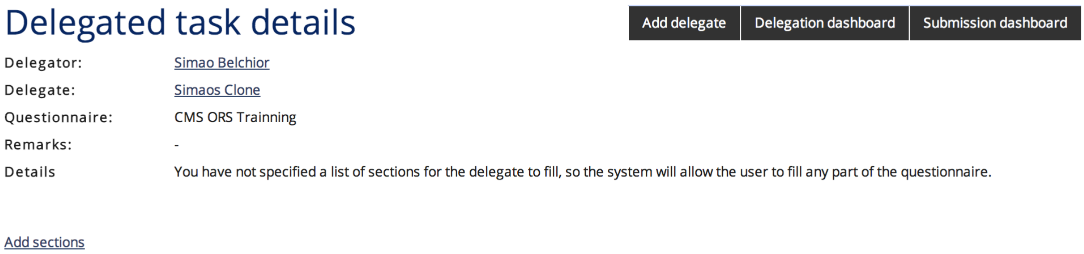


Figure 54 Delegation details

4. Click on ‘Add sections’;

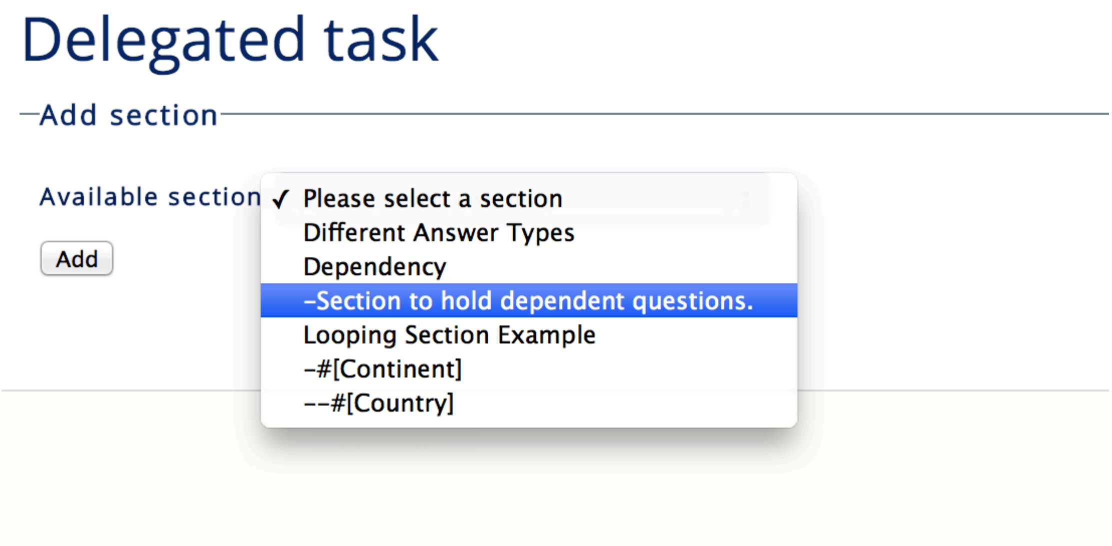


Figure 55 Select section to add to delegation

5. Select the section you wish to add to the delegation;
6. Click on 'Add'. The delegate will now be able to answer to the questions of the selected section on your behalf.