Bern Convention Online Reporting System

A User Guide for Respondents

Updated June 2021

Contents

Introduction

The Bern Convention Online Reporting System (ORS) is an electronic reporting platform developed to streamline the Bern Convention's reporting processes through the creation of customised online questionnaires. This User Guide aims to assist Party respondents in using the ORS to compile and submit their Biennial Reports to the Bern Convention.

The Bern Convention ORS was developed in 2014 by UNEP-WCMC in close collaboration with the Bern Convention Secretariat. The Bern Convention Secretariat acknowledges the contribution of UNEP-WCMC in compiling this User Guide.

1. Registration

The Bern Convention ORS is only available to registered users. This section explains the registration process for new users.

Navigate to http://bern-ors.unep-wcmc.org/ and click on the ‘Sign up’ hyperlink on the right-hand side or in the top right-hand corner of the page (Figure 1.1).

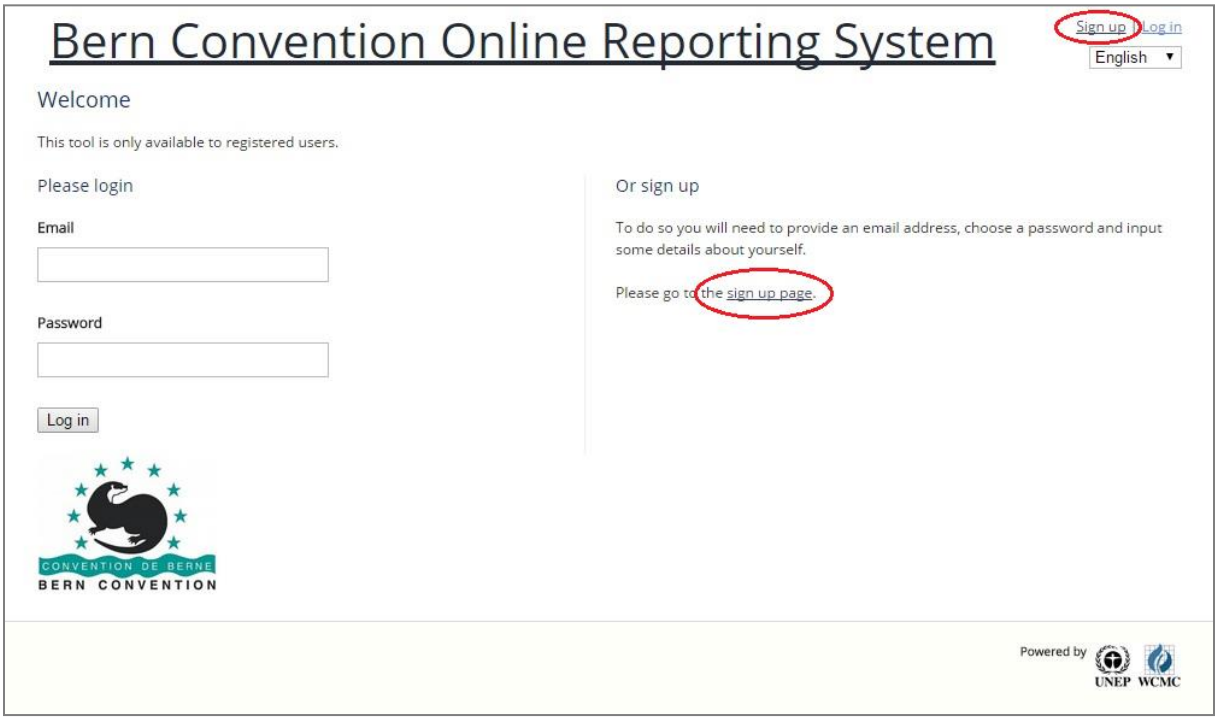

Figure 1.1: Online Reporting System Welcome page

In the ‘Sign up’ page, fill in your details (name, language and email address), create a new password and click the ‘Sign up’ button at the bottom of the page (Figure 1.2). Note that the selected language (English or French) applies to text within the system (menus, links etc), **but not to the report template itself**.

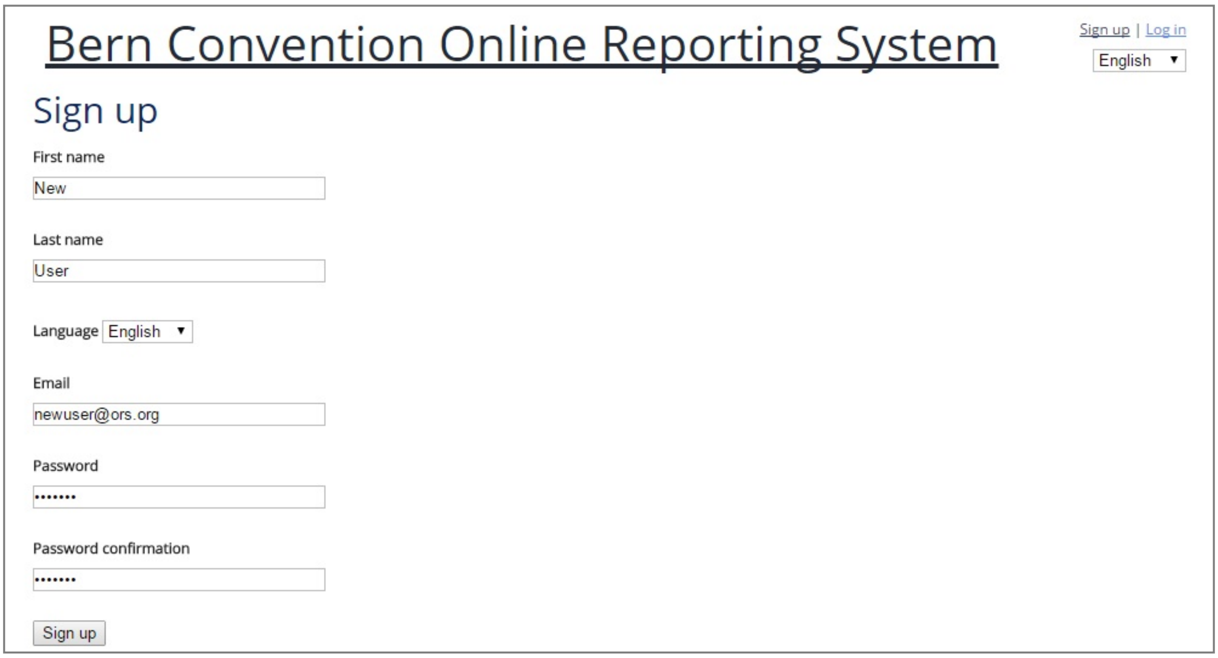

Figure 1.2: Online Reporting System Sign up page

Once you have signed up, you will be automatically logged into the system and will receive an email notification confirming the creation of your user account. The Bern Convention Secretariat will also be notified of your registration. You will not be able to view any report templates until the Secretariat has assigned you as a 'Respondent' for the relevant report; you will receive an email notification to inform you when they have done this.

N.B. If the sign up function does not work, contact the Bern Convention Secretariat (bern.convention@coe.int) who will create an account for you.

2. Accessing a report template

This section explains how users can access the report template(s) to which they have been assigned as a Respondent.

Once logged in, users are taken to the 'User Dashboard' from which they can access the report template(s) to which they have been assigned as a Respondent (Figure 2.1).

Users can return to the User Dashboard from anywhere in the system by clicking on the Bern Convention logo at the top of any page.

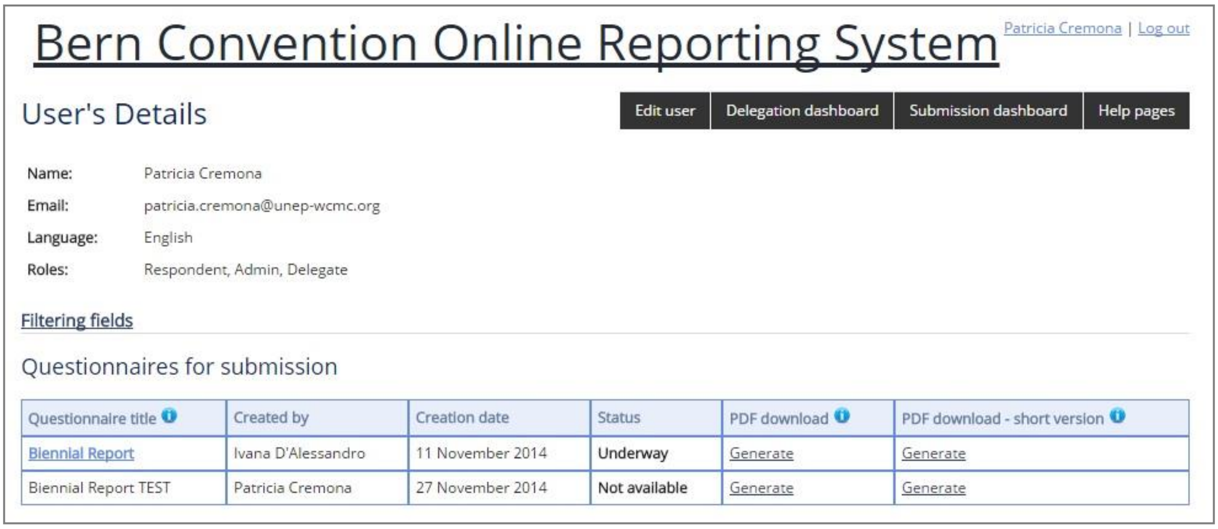

Figure 2.1: Online Reporting System User Dashboard

Where a report template has been activated by the Secretariat (i.e. during the reporting period), the report title in the User Dashboard is a hyperlink that will take you to that report template in order to complete it.

Once a report template has been de-activated by the Secretariat (i.e. once the reporting period is complete), the report title will still be listed here but will no longer be hyperlinked, and therefore the report template will no longer be accessible. However, users can download PDFs with the responses that were submitted.

3. Filling in a report template

This section explains the process for navigating between and completing sections and questions within a report template, and for saving responses.

Report structure and navigation

When a report title in the User Dashboard is clicked, the user will be taken to the report template itself (Figure 3.1).

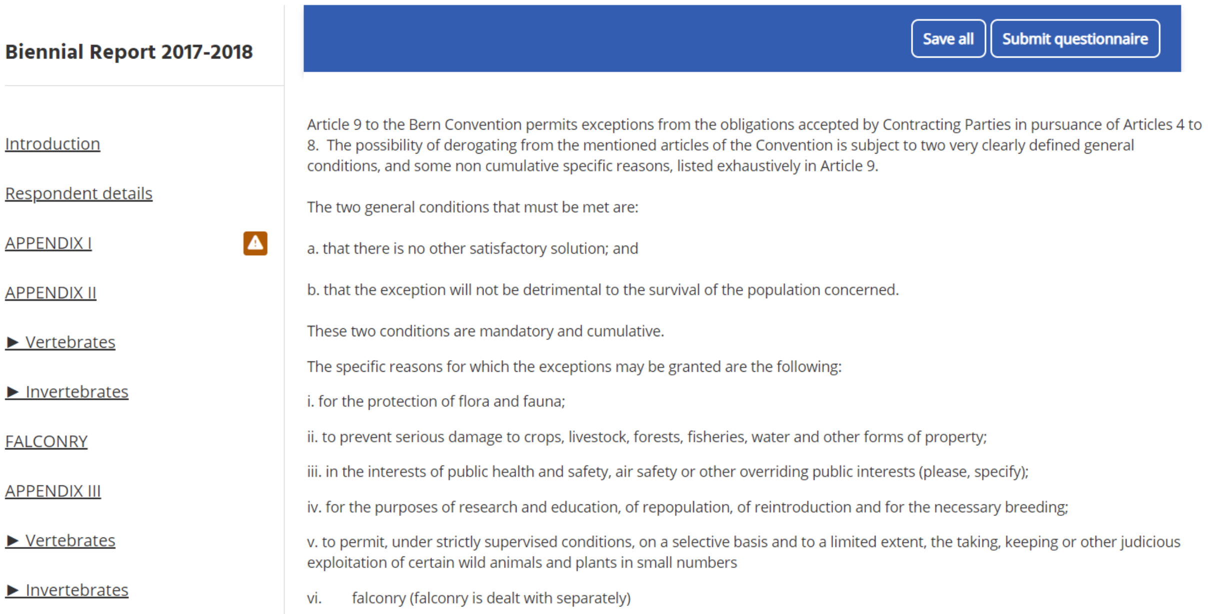

Figure 3.1: Introduction to Biennial Report template in the Online Reporting System

The questions are organised into sections, which can be accessed via a menu on the left-hand side of the page.

If this icon appears next to a section on the left, it means that answers to mandatory questions are missing

To begin completing the template, first fill in the mandatory “respondent details”, then proceed to select the relevant following sections in the menu. Each section may be further divided into sub-sections under sub-headings that appear in blue boxes within the template (Figure 3.2). On the right-hand side of each sub-heading there is a ‘Collapse’/‘Expand’ icon; clicking on this icon allows the user to hide or display all the questions within that sub-section to more easily navigate between sub-sections.

Responding to questions

A range of different response formats are used throughout the Biennial Report template, including radio buttons, drop-down menus and text boxes. Text boxes will automatically expand to accommodate your answer, although you can also increase or decrease the size of text boxes by dragging the lower right-hand corner with your mouse. Note that some boxes may restrict input to numeric values; where this is the case, a note below the box will indicate this (see example in Figure 3.2 below).

There is also the option for users to attach a file or insert a web link to supplement a response, via the two blue hyperlinked icons on the right-hand side of each question.

Saving responses

The system will automatically save responses at regular intervals (every 30 seconds). Nonetheless, it is advisable to also manually save your responses while you work by clicking on the "Save all" button that appears at the top right of each section.

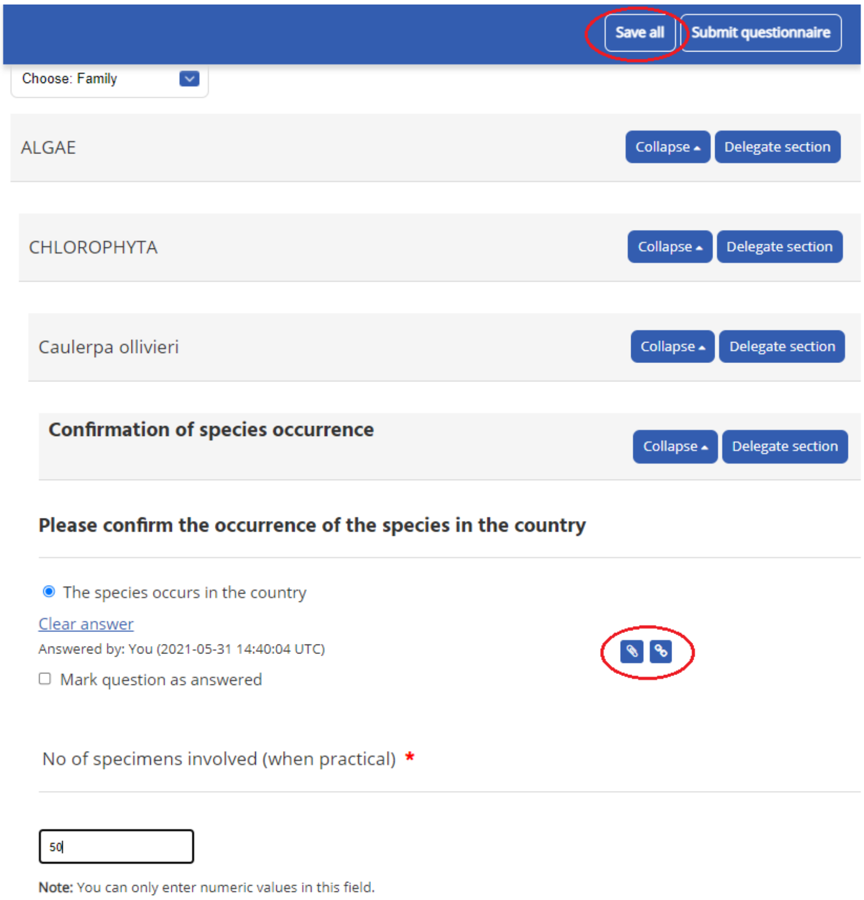

Figure 3.2: Biennial Report template in the Online Reporting System

4. User Roles: Respondents and Delegates

The ‘Respondent’ user role

The National Report is an official document and its submission needs to remain the responsibility of the person appointed officially as the focal point for the instrument in question. Therefore, only the T-PVS Delegates (National Focal Points) can be account holders for each Party. This function cannot be delegated and the log-in details of the T-PVS Delegates who have been assigned the user role of ‘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 T-PVS Delegate to fill in the reporting form single-handedly. The system allows for all or parts of the questionnaire to be assigned to Delegates.

5. Delegation

This section describes how users can delegate all or part of a particular report template to other individuals.

The ‘Delegate’ user role

Users who have been assigned the role of ‘Respondent’ to a particular report by the Secretariat can in turn assign an unlimited number of other individuals the role of ‘Delegate’. Delegates can be assigned specific sections or questions of the report template to complete on behalf of the respondent. Delegates can view all sections of the report, but can only edit those sections or questions which have been assigned to them, and cannot submit the report.

How to add a Delegate

Within the User Dashboard, click on 'Manage my Delegations' button at the top (Figure 5.1).

Click on the 'Add delegate' button. Enter the name and email address of the person you wish to add as a Delegate, and select the appropriate language for that person. Repeat the process for any further Delegates.

The details of all Delegates that have been added will now be listed in the Delegation Dashboard. To delete Delegate accounts if they are no longer required, simply click on 'Remove' under 'Options'.

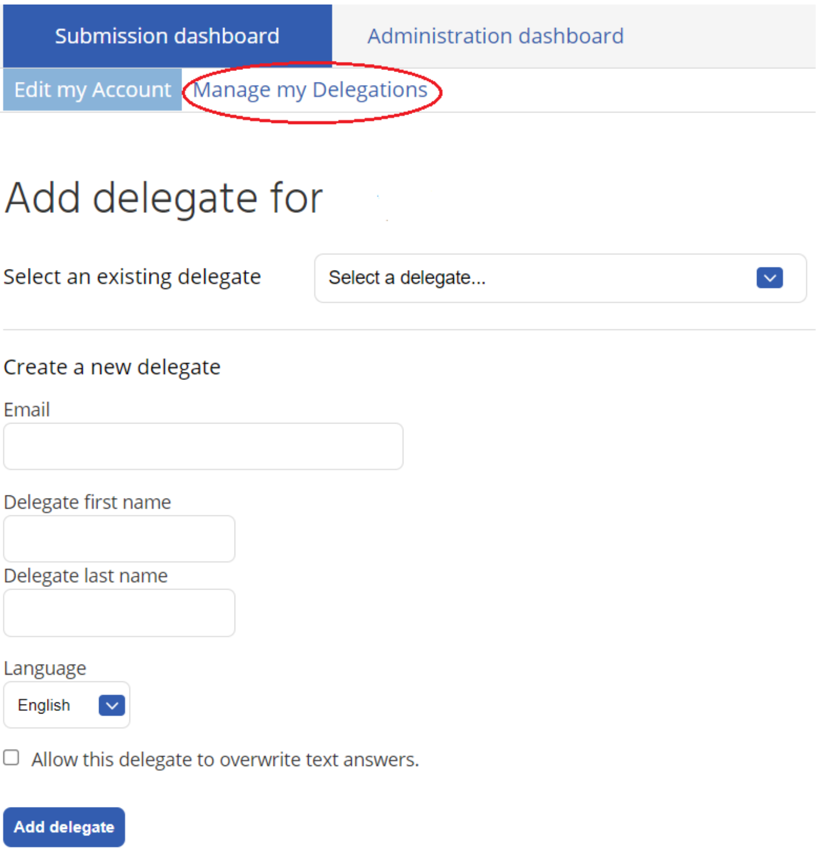

Figure 5.1: Online Reporting System Delegation Dashboard

How to assign, edit and remove delegations

If you would like a particular Delegate to be able to edit a whole report, click on 'Show' under 'Options' to the right-hand side of that Delegate's details in the Delegation Dashboard. Then click on the 'Delegate questionnaire' link, select the relevant report template from the drop-down menu that appears next to 'Available questionnaires' and click the 'Delegate' button at the bottom.

In order to assign specific sections or questions of a report to a particular Delegate, rather than the whole report, go to the report template itself and navigate to the section or question you wish to assign. Then click the 'Delegate section' link to the right of that section or question. A pop-up window will open, which shows you which users already have access to this section and provides a drop-down menu showing all existing Delegates; select the name of the Delegate to which you wish to assign the section and click the 'Delegate' button at the bottom.

Through the same pop-up window you can also remove existing delegations; click the 'Remove delegation' link next to the Delegate's name. You can also view, edit and remove all existing delegations within the Delegation Dashboard by clicking on 'Show' under 'Options' for each Delegate.

6. Downloading a report

This section explains how users can download a PDF version of a report, during or following completion.

From the User Dashboard, users can download a PDF version of any report to which they have been assigned as a Respondent, including all responses that have been provided. This can be done at any stage, regardless of whether the report has been completed or submitted. It is possible to select either 'PDF download' or 'PDF download – short version' (Figure 6.1); the former version includes all questions regardless of whether a response has been provided, while the latter version includes only those questions responded to. It is thus recommended to generate the short PDF version.

First, click the 'Generate' link to generate the PDF. Once generation is complete (this can take a few minutes), you will receive an email notification; you can then download the PDF by clicking on the PDF icon that will appear in the User Dashboard (you may need to refresh the page).

The PDF does not automatically update when changes are made to the responses; in order for these changes to be reflected, a new PDF needs to be generated by clicking the 'Regenerate' link.

Questionnaires for submission

Questionnaire title	Created by	Creation date	Status	PDF download	PDF download - short version
Biennial Report 2017-2018	Ferdinando Primerano	11/19/2019	**Underway**	Generate	Download PDF (Last generated at: 07 July 2020, 15:27) Regenerate
Biennial Report 2019-2020	Ferdinando Primerano	11/19/2019	**Not available**	Generate	Generate

Figure 6.1: Generating PDF reports from the User Dashboard in the Online Reporting System

7. Submitting a report

This section explains how to submit a report to the Secretariat once it has been completed.

A report can be submitted once all mandatory questions have been completed. Click on the 'Submit questionnaire' button in the top right-hand corner of the report template. The following pop-up message will appear (Figure 7.1).

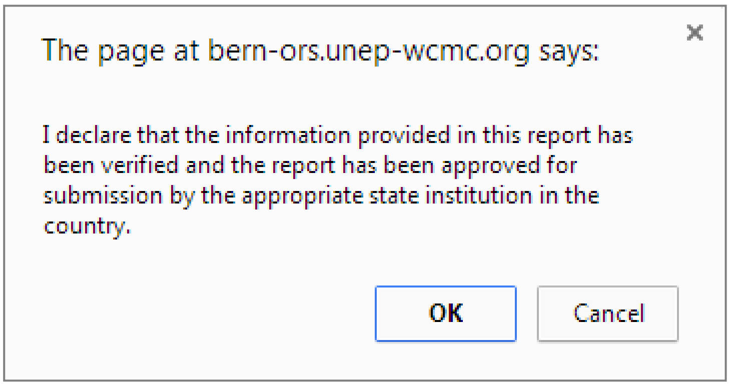

Figure 7.1: Online Reporting System submission confirmation window

If you are happy to proceed, click 'OK'. You will then be taken back to the User Dashboard, where the 'Status' of the submitted report will be shown as 'Submitted' (Figure 6.2).

The Secretariat will receive an email notification that the report has been submitted and they will then be able to download the report from the system.

If necessary, it is possible for users to request the Secretariat to revert submission of a report, to allow further edits to be made. Click on the 'Revert submission' link under 'Status' in the User Dashboard; the Secretariat will receive an email notification and they will then advise whether submission can be reverted.

Annex: Further assistance

Tooltips

Tooltips (identified with the icon) are available throughout the system to assist users. Simply hover your mouse over the icon to display the tooltip.

Contact details

Please report any technical difficulties or functional problems encountered while using the Bern Convention ORS to the WCMC technical team at ORS_team@unep-wcmc.org.

For content-related or general enquiries, you can contact the Bern Convention Secretariat at Bern.convention@coe.int.