Reporting Portal

Quick guide v.1312

Table of contents:

Remember the questionnaire approval policy. . . .

- **After completing the questionnaire, it must be approved (by pressing the "Approve the questionnaire"  button in the top bar of buttons, or the Zatwierdź button available at the bottom of the last page of the questionnaire – both buttons have the same function).**
- **If you open a previously approved questionnaire - you must approve it again.**
- **An approved questionnaire does not require any additional actions (it is automatically saved in the GUS (Statistics Poland) database, additionally you will receive a confirmation via email)**

1. Technical requirements

The Reporting Portal application works in a web browser environment.
Recommended browser types: **FireFox, Google Chrome, Internet Explorer (at least version 8. 0)**

Browser requirements:

- acceptance of cookies
- enable JavaScript in your web browser
(By default, your browser already has this setting).

Additional programs:

To view printouts of forms (PDF format) you will need Adobe Acrobat Reader, which can be downloaded for free from the manufacturer's website:
http://www.adobe.com/products/acrobat/readstep2_allversions.html

2. Logging in to the Portal

Address of the webpage

To log into the Reporting Portal, enter the address in your web browser:
https://raport.stat.gov.pl

In order to avoid typing in the address every time, simply bookmark the page using the appropriate function of your web browser (from that moment on, the Reporting Portal page will be available in your favourites list).

Authentication data

On the login page, enter your ID and Password credentials received from the Statistical Office (or generated by the person managing the reporting in the company/institution).

3. Electronic Questionnaire

3.1. Launching the electronic questionnaire

After logging in to the Portal, a welcome screen is displayed with information about the user, their reporting obligations and the number of unread messages.

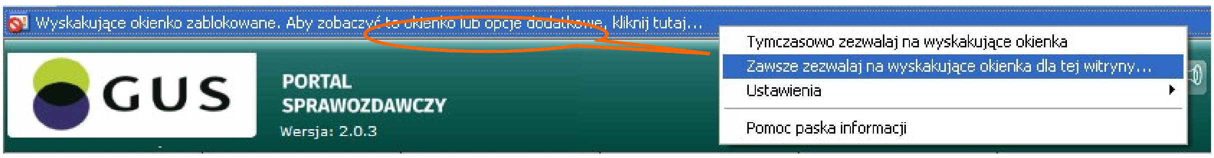
To perform actions related to the transmission of statistical data, go to the screen **Respondent**, by clicking the ***Respondent*** button or the ***Go*** button (see Image below):

The ***Respondent*** screen is divided into 2 sections:

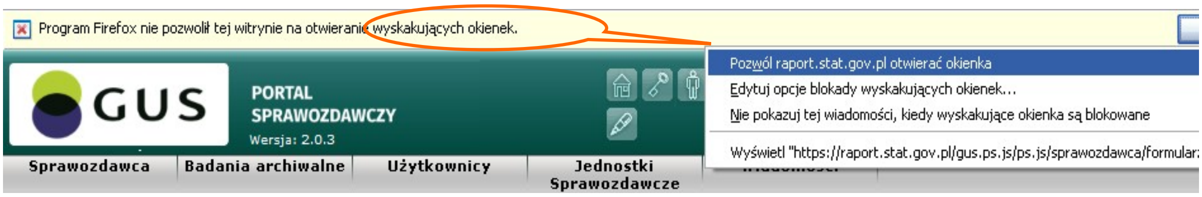
- ***The List of Reporting Units supported by the user*** presents a list of units for which the logged-in user can perform reporting obligations. This list may include a larger number of units in a situation where the entity has an extensive organizational structure, i. e. has local units registered in the REGON system, e. g. branches or subsidiaries.
- ***The list of current reporting obligations*** presents the list of current statistical surveys in which the unit indicated in the list supported by the user is subject to reporting obligations.

In order to start work with the electronic questionnaire of a given statistical survey, one should indicate this survey on the list of currently conducted surveys in the section *List of current reporting obligations* (this survey will be marked in orange), and then press the *Questionnaire* button

Since the electronic questionnaire is opened in a new browser window, you should allow pop-up windows to be shown for the Portal site when it is first launched.



Unblocking pop-up windows in Internet Explorer

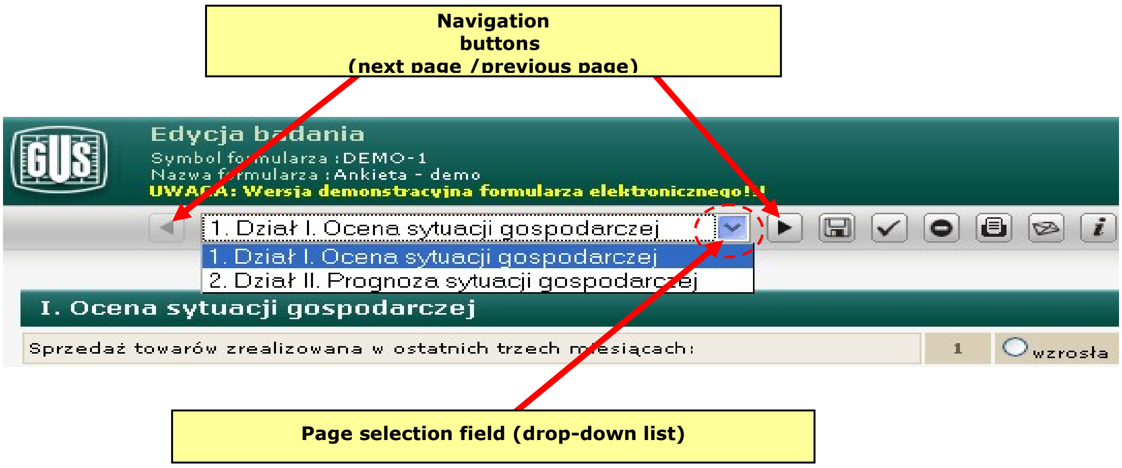


Unblocking pop-up windows in Firefox web browser

These actions should result in an electronic questionnaire opening in a new browser window:

3.2. Working with an electronic questionnaire

Filling in the questionnaire consists in answering the questions by ticking the boxes, entering values into the edit fields or indicating the relevant item in the list (classification) made available. The rules of working with the relevant questionnaire are described each time in the help file, ***Questionnaire description*** button). The questionnaire is divided into pages which can be navigated by means of navigation buttons allowing to go to the next, previous or a particular page selected from a drop-down list located between the navigation buttons.



The user should analyze the entire structure of the questionnaire by entering data on all pages that pertain to the subject of their business/activity. Although the pages can be filled out in any order (the user chooses the page he/she wants to work with), it is recommended to fill out the questionnaire in a linear fashion, i. e. to go through all the pages of the questionnaire one by one (after each page, the „Next page" button should be pressed, see image above). Any other strategy for working with the questionnaire is acceptable, provided that the correct end result is achieved, i. e. all required information is entered.

Saving the data on the page is done automatically when you go to another page. You can also manually save the data from the current page using the ***Save page*** button, but this is recommended when the user wants to validate the data on a given page without leaving the page (saving the page is equivalent to running the validation routine).

After completing the questionnaire, press the "Validate the Questionnaire " button or the Zatwierdź buton available at the bottom of the last page of the questionnaire (both buttons have the same function however, the latter one is available only on certain questionnaires), which will start the procedure of checking the correctness of all data entered on the questionnaire and in the absence of absolute errors will save the questionnaire in the system database and change its status to ***Approved.***

After the questionnaire has been successfully validated, there is no need to perform any additional actions, it will be automatically saved in the system database, at the same time an email will be sent to the Respondent confirming that the statistical report has been submitted.

3.3. Data validation

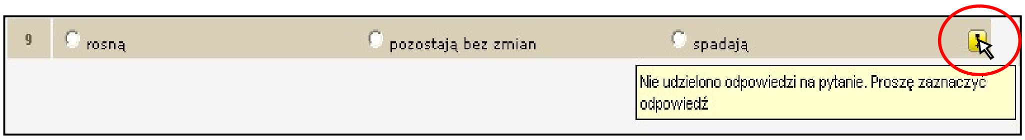
While working with the questionnaire, the correctness of the entered information is controlled. Control procedures are run automatically when switching between pages and also when the user presses the ***Save page*** button .

Errors identified within the questionnaire data may be of the following nature:

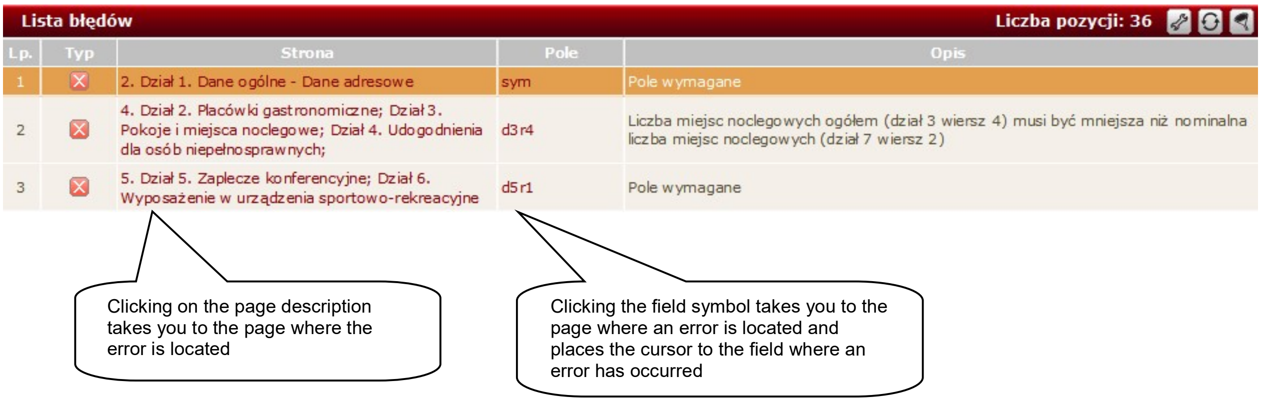
- *absolute* (marked with =>)

  or
- *acceptable* (marked with =>).

An ***absolute*** error prevents the questionnaire from being approved, while an **acceptable** error is informational only and does not block this possibility. When you point the mouse cursor to the error icon, an error message is displayed:



Additionally, all errors identified on the questionnaire are presented in the error panel called up (and hidden) by the button ***Show/hide errors*** . Clicking the mouse cursor in the cell with the page name of a given row in the presented list results in automatic transfer to the page where the error has been identified, whereas clicking in the ***Field*** cell moves the cursor to the field where the error occurred.



In case of any doubts related to filling in the questionnaire , the user may use the ***New message*** button - it makes it possible to send a message to the Statistical Office with a description of the problem (for more information see chapter 7 "**Internal mail**"). This message will be answered by the staff member responsible for the subject matter. Independently, for each questionnaire there is an information material available on how to fill it in (button ***Form description***).

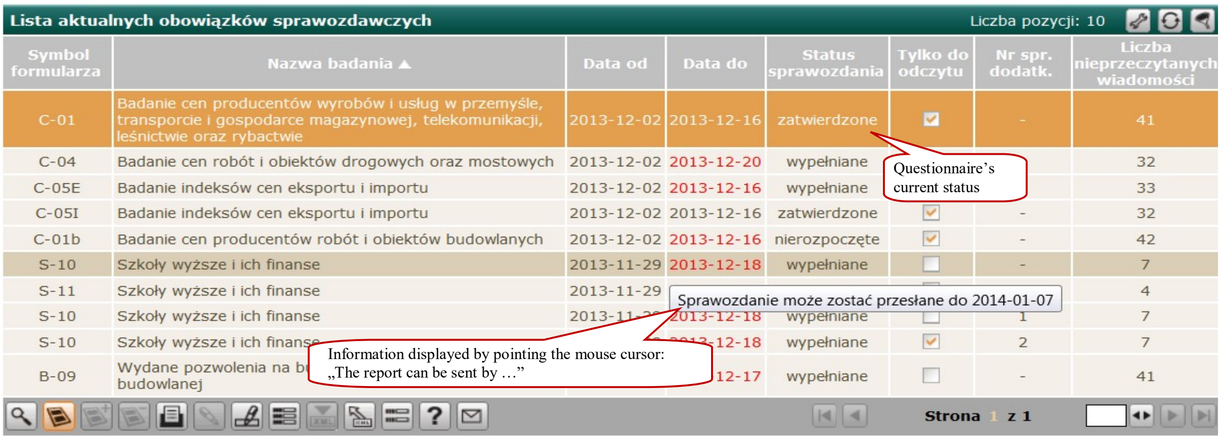
3.4. Printout of the questionnaire

The user can download a printout of the questionnaire as a PDF file (***Print*** button on the questionnaire or on the **Respondent** screen in the **List of current reporting obligations** section, the button). The file will contain the questionnaire along with the data that was saved before the ***Print*** function was called.

3.5 Monitoring the status of fulfilling the statistical obligations

The electronic statistical report should be submitted within the legal timeframe. The date of availability of the electronic questionnaire is shown in the ***Date From*** and ***Date To*** fields. If the data is not submitted by the deadline, then the date in the ***Date To*** field will be displayed in red and a prompt will be sent to the user. If an additional date is allowed, it will be displayed by pointing the mouse cursor at the date marked in red.

The life cycle of a statistical report in the Reporting Portal describes the arrangement of statuses that are assigned to this report as it goes through successive stages of processing.
The current status is presented for each report in the ***Respondent*** window, in *the* ***List of Current Reporting Obligations*** in the ***Report Status*** column.



Lista aktualnych obowiązków sprawozdawczych — Liczba pozycji: 10

Symbol formularza	Nazwa badania ▲	Data od	Data do	Status sprawozdania	Tylko do odczytu	Nr spr. dodatk.	Liczba nieprzeczytanych wiadomości
C-01	Badanie cen producentów wyrobów i usług w przemyśle, transporcie i gospodarce magazynowej, telekomunikacji, leśnictwie oraz rybactwie	2013-12-02	2013-12-16	zatwierdzone	☑	-	41
C-04	Badanie cen robót i obiektów drogowych oraz mostowych	2013-12-02	2013-12-20	wypełniane			32
C-05E	Badanie indeksów cen eksportu i importu	2013-12-02	2013-12-16	wypełniane			33
C-05I	Badanie indeksów cen eksportu i importu	2013-12-02	2013-12-16	zatwierdzone	☑	-	32
C-01b	Badanie cen producentów robót i obiektów budowlanych	2013-12-02	2013-12-16	nierozpoczęte	☑	-	42
S-10	Szkoły wyższe i ich finanse	2013-11-29	2013-12-18	wypełniane	☐	-	7
S-11	Szkoły wyższe i ich finanse	2013-11-29					4
S-10	Szkoły wyższe i ich finanse	2013-11-	2013-12-18	wypełniane	☐	1	7
S-10	Szkoły wyższe i ich finanse		-12-18	wypełniane	☑	2	7
B-09	Wydane pozwolenia na b… budowlanej		12-17	wypełniane	☐	-	41

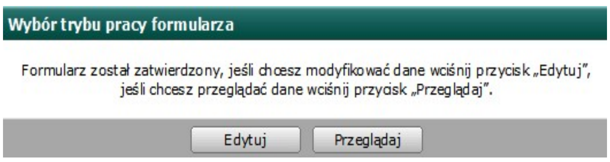
The electronic questionnaire goes through stages listed below:

- **Not started -** no work on electronic questionnaire started
- **In progress -** report is in the process of being completed
- **Validated -** the report has been completed and approved
- **Verified -** the report approved by the Respondent is subject to additional control in the Statistical Office
    - ***Corrected*** *– the report has been opened to analyse errors identified in the external system [optional status]*
    - ***Revised*** *- the report was modified after it was opened in the "Revised" state [optional status]*
- **Completed –** the report has been found correct and accepted by the Statistical Office

Thanks to the solution presenting the current status of the report, the Respondent has a possibility to monitor the status of fulfilling the reporting obligations in relation to the surveys made available on the Reporting Portal (in particular, the person managing the reporting has an insight into the progress of fulfilling the obligations by other persons entrusted with the preparation of statistical reports).
The moment when the report reaches the ***Completed*** stage means that the reporting obligation has been fulfilled (at this time it is also possible to print a note confirming the fulfilment of the obligation, see *description below*.

3.6. Opening of the validated report

Opening of a report in a ***Validated*** state requires an indication of the operating mode (editing or viewing).



If the user intends to modify the data, he/she should select the edit mode (***Edit*** button), and after finishing work, approve the report again. If opening the report is only to view the data, then select the view mode (***Browse*** button).

3.7. Saving the data from the report on the user's computer [1]

Irrespective of the fact that data from the report is automatically saved in the GUS (Statistics Poland) database, a user of the Reporting Portal application has a possibility of saving this data on their computer and later importing (copying) it to a questionnaire of the same structure.

This means that the user, after entering the data and approving the questionnaire, can save the data so that in the next edition of the survey (e. g. in a month) the data can be copied and only the values that have changed in relation to the previous reporting period can be modified.

The data is saved in XML format and is fully readable for the user only after being imported into the questionnaire structure.

To save the questionnaire on your local disk, use the ***Export to XML*** function.

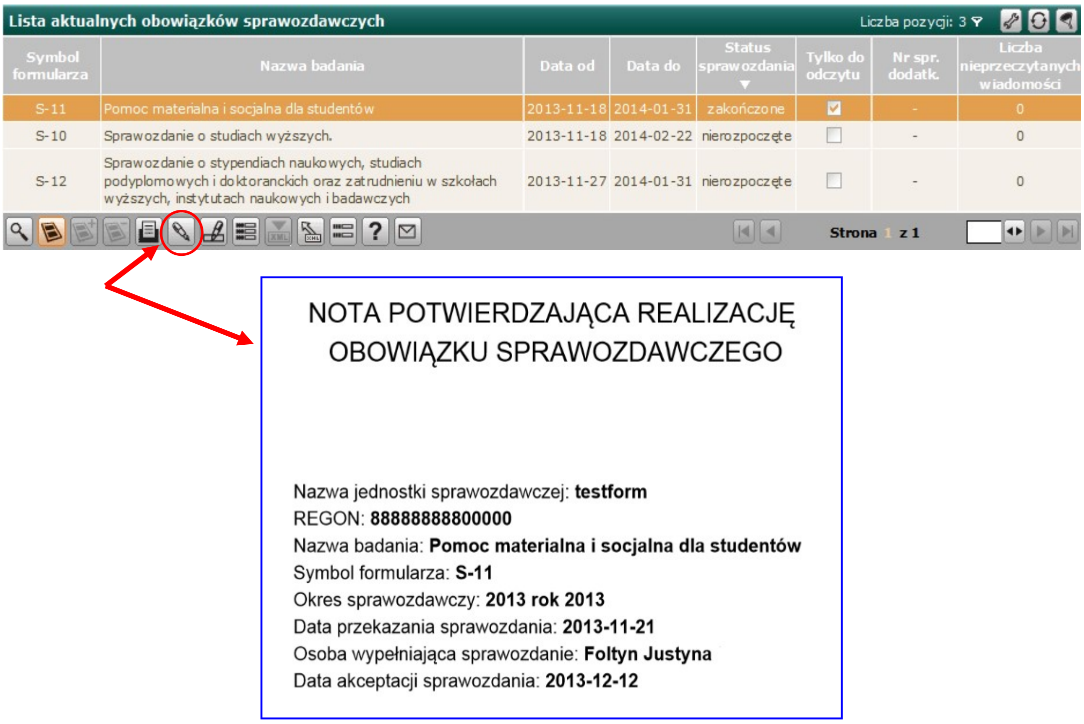
Import of a questionnaire saved previously in an XML file is realized by the ***Import XML*** function.

3.8. Printout of a note confirming the fulfilment of the reporting obligation

In order to confirm the fulfilment of the reporting obligation, the Reporting Portal enables the printing of a ***Note confirming the fulfilment of the reporting obligation.***

This option is available from the moment the report moves to the ***Completed*** stage.

The "Note. . . " button is then activated on the **Respondent** screen, which will generate a note file in PDF format. This file can be printed out, or kept on your computer in an electronic form.



Symbol formularza	Nazwa badania	Data od	Data do	Status sprawozdania	Tylko do odczytu	Nr spr. dodatk.	Liczba nieprzeczytanych wiadomości
S-11	Pomoc materialna i socjalna dla studentów	2013-11-18	2014-01-31	zakończone	☑	-	0
S-10	Sprawozdanie o studiach wyższych.	2013-11-18	2014-02-22	nierozpoczęte	☐	-	0
S-12	Sprawozdanie o stypendiach naukowych, studiach podyplomowych i doktoranckich oraz zatrudnieniu w szkołach wyższych, instytutach naukowych i badawczych	2013-11-27	2014-01-31	nierozpoczęte	☐	-	0

[NOTE CONFIRMING THE REALIZATION OF A REPORTING obligation

Name of reporting entity: testform

REGON:88888888888800000

[1] This function is available only for some statistical questionnaires (when data from the previous reporting period can be the basis for entering data for the next reporting period).

Name of the survey: Material and social assistance for students

Questionnaire symbol: S-11

Reporting period: 2013 rok 2013

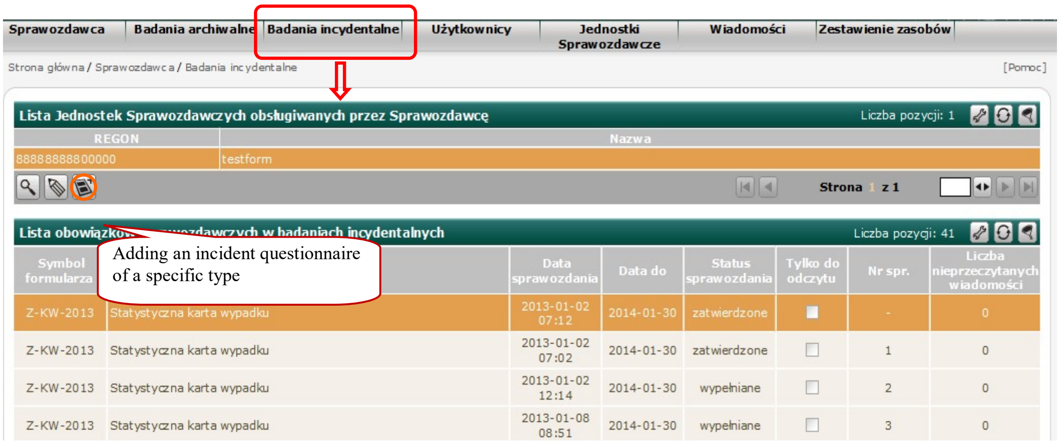
Date of transmission of the report: 2013-11-21

Person completing the report: Foltyn Justyna

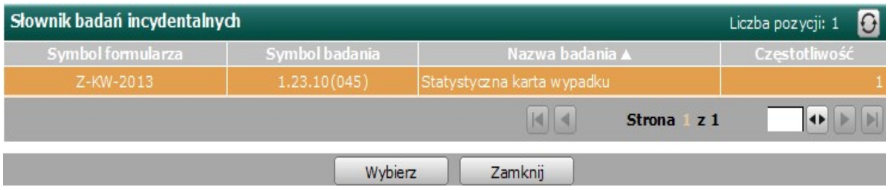
Date of the acceptance of the report: 2013-12-12]

4. Questionnaires to be completed incidentally (Z-KW and Z-KS)

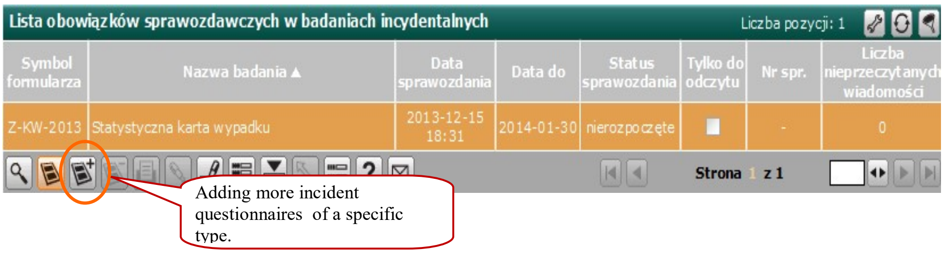
The Reporting Portal provides questionnaires to be filled out when an obligatory event occurs (Z-KW *Statistical Accident Card* and Z-KS *Statistical Strike Card*). Questionnaires that are filled out incidentally are added by the user to the list view after entering the ***Incidental Research*** screen.



To add a questionnaire to a list view, press the button in the ***List of Reporting Entities operated by the Respondent*** window (for entities with local units, the list should first indicate the unit for which the questionnaire will be added), and then select the questionnaire type.



When a questionnaire of a particular type is added, a form labeled "-" in the ***Spr No.*** field will become available in the ***Incident Investigation Reporting Obligations List.***



Subsequent questionnaires of the same type are added in the ***List of reporting obligations*** in incidental research window by selecting any previously added questionnaire of a given type and pressing the button. Incident questionnaire that are added are assigned sequential numbers as shown in the ***Spr. No***. field. This facilitates the identification of questionnaires that are worked with in stages at intervals.

Incident survey questionnaires can be deleted using the button, as long as they have not been approved (a deleted questionnaire stays on the obligations list with the ***deleted*** status).

Incident survey questionnaires added to the list of obligations are opened with the button, working with them follows the same rules as with the other questionnaires.

5. Archival surveys

The Reporting Portal collects and provides access to archival resources on completed surveys. These resources are available by navigating to the ***Archival Surveys*** screen.
In the ***List of Completed Surveys of the Reporting Entity*** window (***Completed Surveys*** tab), electronic questionnaires are available, along with printouts and XML data files, for editing recently completed surveys.
In the ***List of Archived Reporting Obligations*** window (the ***Archived Surveys*** tab), there are resources available for editing archived surveys for which electronic questionnaires are no longer available, but you can download a printout of the questionnaire and an XML file with the data (separately or together as a compressed .zip package).

6. User management

6. 1. The structure of the Portal users in the Reporting Entity

In each Reporting Unit using electronic reporting there is **one user managing the reporting**, appointed at the moment of creating the account of this Unit (the account is created after submitting to the Statistical Office the declaration of participation in electronic reporting).
The reporting manager has access to all Portal functions and resources concerning the Unit in which he/she was appointed, i. e. he/she can work with the questionnaires of all statistical surveys concerning the Unit, he/she can appoint and remove additional Portal users and define the scope of their privileges, he/she has an insight into all messages sent and received by the users of the Reporting Unit within the internal mail of the Portal.

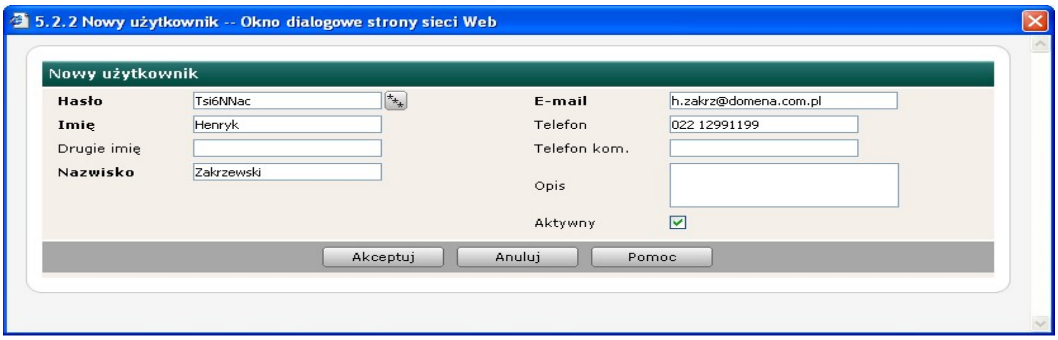
The person managing the reporting may create any number of additional user accounts and assign them to work with the questionnaires of the indicated statistical surveys (including defining the scope of supported local units in entities with extended organizational structure).

6.2. Appointing of an additional Portal user

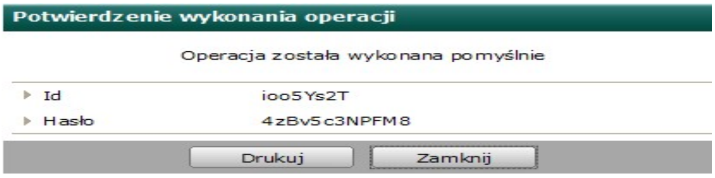
The process of appointing an additional user takes place in 2 stages :

Stage 1) creating a user account

To create an account, select the ***Users*** option from the menu and then press the ***New User*** button. Then, in the dialog box, fill in at least the mandatory fields marked in bold. It is required for the password to consist of at least 8 characters, however it can be generated automatically using the button located next to the ***Password*** field. The account must be activated by checking the ***Active*** box.



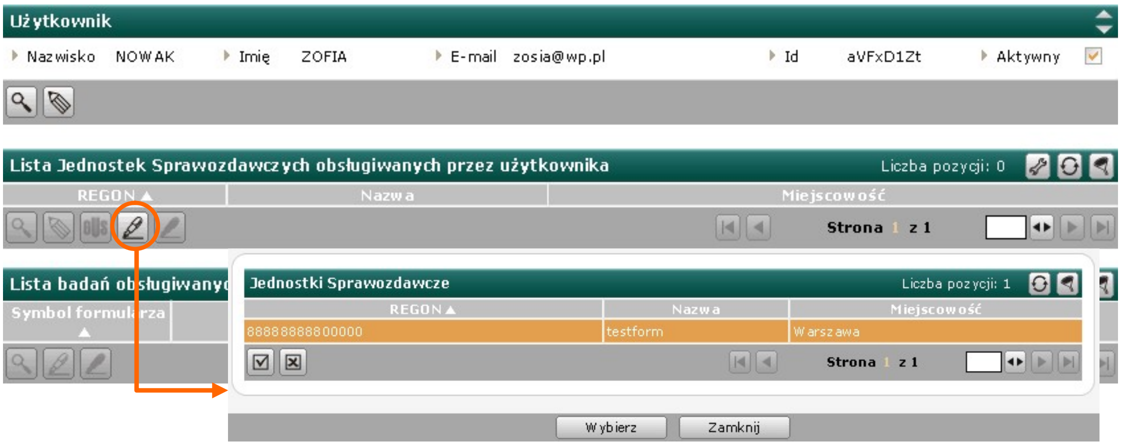
After accepting the entered information, the application will display the authentication data, i. e. **the password** and the automatically generated unique user **identifier** (it is not possible to change this identifier).



The password defined at this stage cannot be later "viewed" in the system, only a new password can be generated. You can print the credentials.

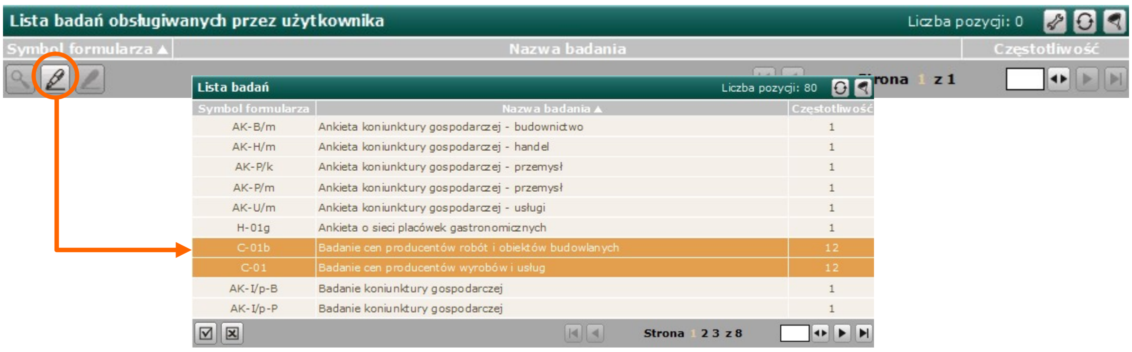
Stage2) Assignment of the user to the Reporting Unit and statistical surveys

On the ***Supported Reporting Units*** screen (button), in the ***List of Reporting Units section supported by the user*** section, using the ***Assign support*** button open the window for selecting Reporting Units (if the Unit does not have branches or sub-branches there will only be one entry) and select the Unit to be supported by pointing the mouse at the item on the list, and then confirm with the ***Select*** button.



In the next step, in the section ***List of surveys supported in the Reporting Unit*** (***Assign support*** button ***),*** you should select statistical studies to which a given user will be assigned (you can select more than one study by pressing the Ctrl key while selecting an item in the table with the mouse).

The ***Remove Assignment*** allows you to revoke the authority to operate a particular reporting unit or the indicated statistical surveys.



The newly created user, after logging in to the Reporting Portal, will work only with the surveys to which he has been assigned and only in the context of the selected Reporting Units (the other resources of the Portal will not be made available to him).

7. Exchange of messages related to reporting (internal mail)

The Reporting Portal provides the functionality to send and receive messages electronically (so-called internal mail).

Message exchange panel

A special message exchange panel has been made available in the Reporting Portal, which can be opened from the ***Respondent*** window by using the ***Messages*** button. This panel is a kind of mailbox, which allows you to send, receive and view messages of all types (including archived).

Messages Panel

The individual buttons represent the following interface functions:

- ***Messages received*** – go to all messages received
- ***Messages sent*** – go to all messages sent
- ***Message threads*** – going to the list of messages grouped into threads (according to the scheme question -> answer). Threads group all received and sent messages, allowing you to track the exchange of messages regarding a given problem/issue

In order to facilitate access to the messaging function the ***clarification*** and ***technical consultation*** buttons are available not only in the ***Messages*** panel, but also in those windows of the application where they may potentially need to be used (of course messages sent from other windows are later seen in the ***Messages*** panel, which collects all correspondence flowing between the Respondent and the Statistical Office).

How to send a message

The portal allows Respondents to send messages of two categories:

- ***clarification -*** for a message the content of which is a question or remark concerning the subject of research;
- ***technical consultation*** - if the message concerns the technical functioning of the Reporting Portal;

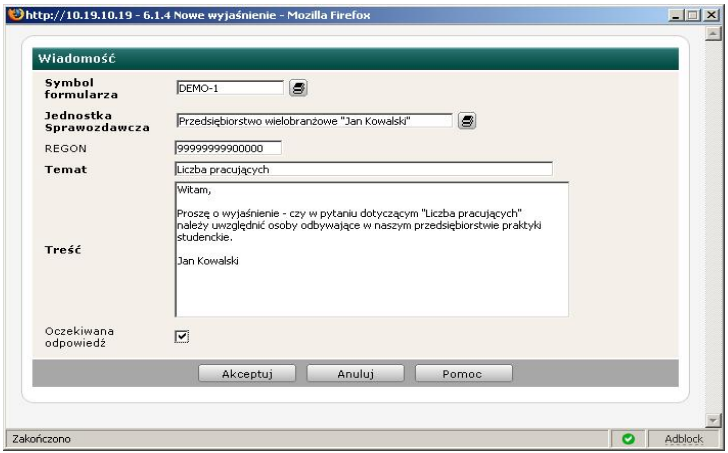
The distinction between message categories is intended to determine the correct addressee of a message in the Statistical Office. Messages sent as ***clarification*** will be delivered to the statistician dealing with the subject matter of the survey, and messages of a ***technical consultation*** nature will be received by the Portal technical administrator in the office.

a) A message of the category ***Clarification about the subject of the survey*** may be sent:

- directly from the electronic questionnaire – button.

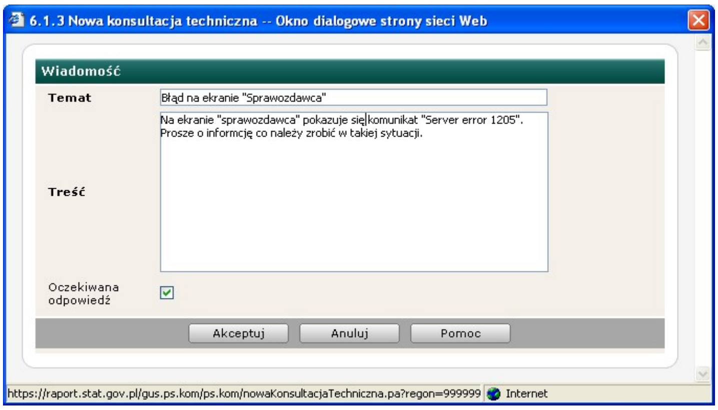
- *from* ***the Respondent screen (***and other screens called from the ***Respondent*** level***)*** - button
- from the ***Messages*** panel

Since a message in this category is always about a specific survey, it will be sent once the context of the survey has been established. For messages sent from the ***Respondent*** screen or from an electronic questionnaire, the Portal will automatically associate that message with the survey that is currently selected. When the message is sent from the ***Messages*** panel (where all surveys are supported), the user must select a survey from the list of surveys (***Symbol of the questionnaire*** field).



New message in the „Clarification" category

b) A message of the ***Technical Consultation*** category can be sent from the ***Messages*** panel and from those application screens where the button is available.

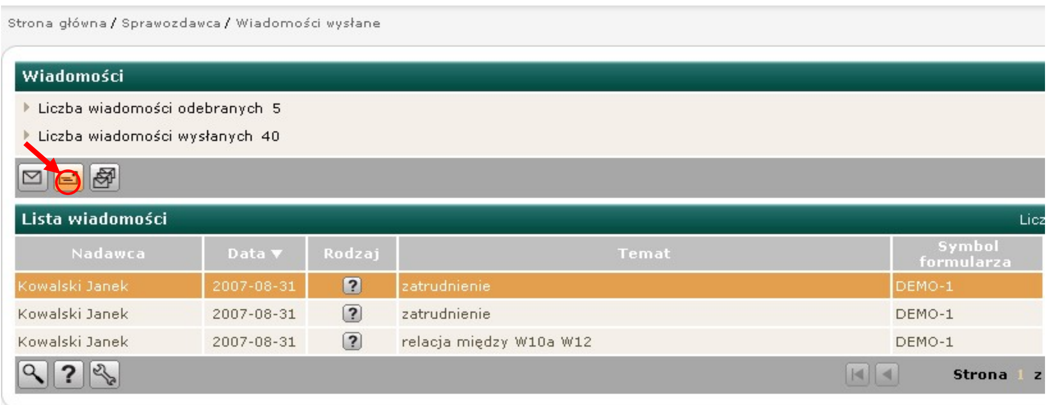


New message categorised as"Technical consultation"

In order to send a message you should enter appropriate information in the "Subject" and "Content" fields and then use the **Accept** button, which is equivalent to sending the message.

If the sender expects a reply to be sent, they should also check the ***expected reply*** option.

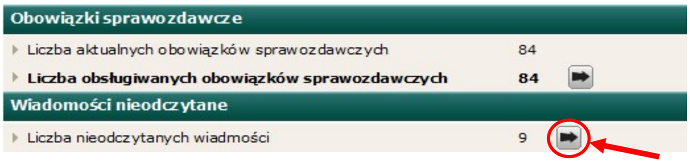
All sent messages are available in the **"Messages"** Panel, on the ***List of sent messages*** (button),



How to read a message?

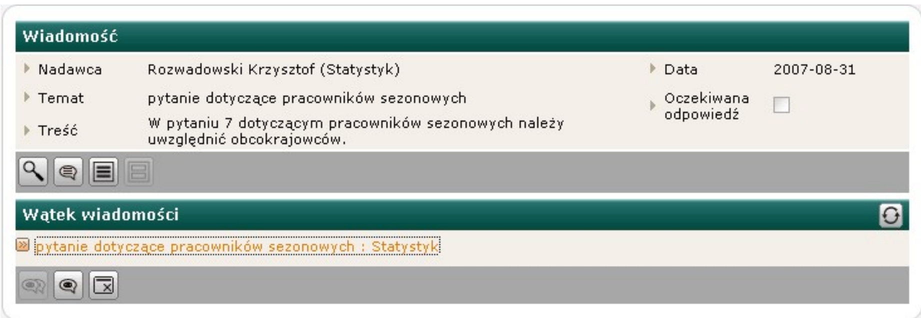
Messages sent to Respondents (including automated notifications) are available within the internal mail interface of the Reporting Portal.

On the initial screen, directly after logging in to the Portal, the information about the number of unread messages is visible :



Clicking the button will open the ***Messages*** panel. All the messages received are available on the ***List of Received Messages***(button) whereby unread items are marked in bold.

To read a message you must click twice at the relevant line on the list of messages, or press the **Details** button . In the window that opens, the ***Message*** section will then display all the information associated with that message (sender, subject, content, date, and status indicating whether the sender is expecting a response).



A "Message" window

A message that has been read should be marked by the user with the ***Read*** status (button). If the user foresees a return to the message he can close the window without setting the ***Read*** status, he also has the possibility of performing the reverse operation, i. e. changing the read status to ***Unread*** (button).

Each message addressed to a Reporting Unit is additionally sent by e-mail to the address of persons performing reporting duties in this Unit (this is a copy of the message that is made available in the Portal according to the scheme presented above). The use of this solution is intended to increase the certainty that the sent message will be read in a short period of time (thanks to this, the user has the possibility to receive messages concerning reporting not only when he/she works in the Reporting Portal). As the e-mail channel is used only in an auxiliary way, it is not possible to reply to a message by this means (it is possible only after logging in to the Reporting Portal)

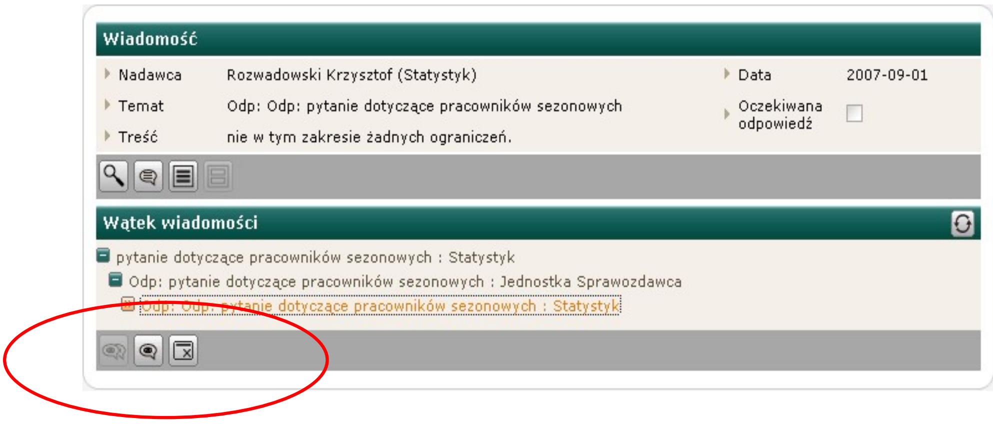
How can I send a reply to a received message?

In order to reply to a message received, use the ***Reply*** button

Message threads

Both categories of messages (clarifications and technical consultations) form threads, i. e. a logical connection between the message and the given answer is memorized, which allows for a quick overview of the entire flow of information on a given issue. Messages related to a specific thread are presented as one item (one thread) in the ***Message threads*** list in the **Messages** panel.

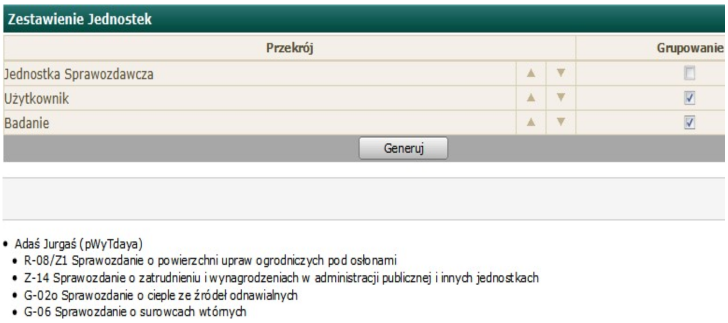
After selecting the thread details, a new window presents a tree of messages related to this thread. Messages in a thread are displayed chronologically.



Message thread

8. Summary of resources

On the ***Summary of Resources*** screen, you can list information about Reporting Entities (applies to entities with local units - branches, plants, etc.), users who have a Reporting Portal account, and surveys that the entity is or has been subject to. By checking the grouping levels you can obtain information about the association of individual resources, for example, if you check ***User*** and ***Study***, you will see a list of all users and a list of surveys to which each user has been assigned by the Reporting Unit reporting manager.



9. What else is worth knowing?

Structure of the application interface

The Reporting Portal application has 7 functional areas represented by the menu options shown in the figure above. The most important functions made available in particular areas have been discussed in chapters 3-8, in the form of scenarios for performing specific actions (e. g. working with an electronic questionnaire, appointing users, using internal mail).

Respondent
The statistical surveys service area, where statistical questionnaires and functions used in the course of fulfilling reporting obligations are available.

Archival surveys
An area where questionnaires and other archival resources for completed surveys are available.

Incidental surveys
An area where questionnaires are available that are submitted incidentally in the event of a reportable event (Z-KW Statistical Accident Card and Z-KS Statistical Strike Card).

Users
Reporting Unit user management area. Provides functions for appointing new Portal users and tasking them with designated reporting responsibilities.

Reporting units
An area to view and manage the permissions of Portal users appointed by the Unit's reporting manager. This area is particularly important for Reporting Entities with an extended organizational structure (having branches, subdivisions, etc. - i. e. local units included in the REGON register), due to the possibility of delegating the reporting duties to individual local units.

Messages
Directs you to the ***Messages*** panel to view all messages in the selected category.

Summary of resources

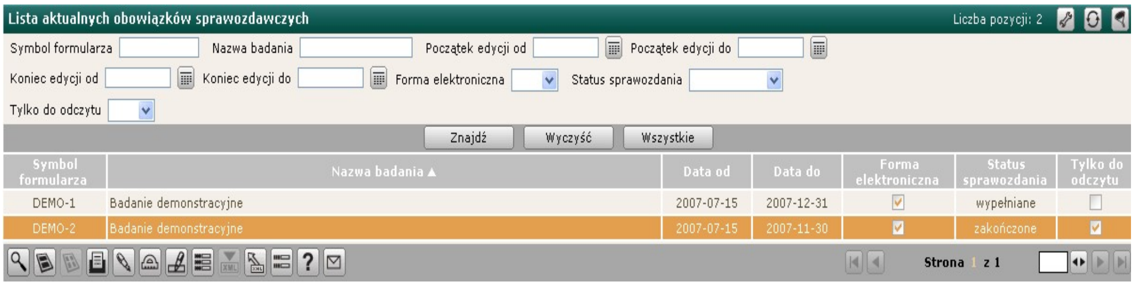
An area providing aggregate information about the resources of a given Reporting Unit in the Portal, with the possibility of detailed reporting on the allocation of these resources to local units and users.

NOTE: Help is available for each application screen; it will appear by clicking on the [Help] link at the top right of the screen. In addition, you can see a brief description for each button when you position the mouse cursor on it.

User interface - working with table

The interface of the Reporting Portal consists of several graphical components for user interaction with the system. Their principle of operation is the same throughout the system.

The basic component of the interface is the table:



Buttons common to each table:

– - allows you to configure the appearance of the table (the order of columns, their visibility and how to save individual settings)
– - refreshes the table content (without reloading the page)
– - displays a filter settings panel for the table, which allows you to change the displayed table contents according to the defined parameters
– - displays a window containing details of the selected row (depending on the table context, details of the user, statistical survey, etc. will be displayed), the same functionality is available by double-clicking on the selected row.

If a filter has been applied to the table, an icon is displayed next to the number of items that satisfy the filter conditions .

In the bottom right corner of the table, there are buttons for navigating between pages of the table (the buttons are active when the contents of the table do not fit on a single page) and the page number that the user is currently on.

Demo version of the Reporting Portal

The application functions presented in the document can be tested by running a demo version of the Reporting Portal.

Login data in the demo version of the Portal:

Id: test

Password: testtest

Any actions performed using the interface of the demo version of the Portal do not cause any undesired effects, hence you can freely use all the provided functions.