Using CDP’s Disclosure Platform - Companies

For disclosure on climate change, forests, water security and supply chain
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**Version Control**

<table>
<thead>
<tr>
<th>Version Nr.</th>
<th>Revision Date</th>
<th>Released</th>
<th>Revision Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>March 2016</td>
<td>March 2016</td>
<td>This guidance to the activation process and Online Response System (ORS) has been prepared to allow organizations to understand the processes and functions involved in the 2016 disclosure period.</td>
</tr>
<tr>
<td>1.1</td>
<td>April 2016</td>
<td>April 2016</td>
<td>Contents page expanded, and header changes made (minor wording changes some sections of ‘Key features of the ORS’ combined)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Wording changes to ‘Your dashboard’ page (meaning remains the same)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Additional information about public and non-public responses in the ‘Submitting your response’ section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>‘Program specific differences’ section added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Additional information in the ‘Getting help’ section.</td>
</tr>
<tr>
<td>2.0</td>
<td>February 2017</td>
<td>February 2017</td>
<td>Wording changes to refer to ‘CDP’s disclosure platform’ to encompass the whole CDP system, rather than just ‘the ORS’.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Other minor wording updates for 2017 as more organizations will now be registered on the new website.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Additional information about ‘My Files’, the admin fee and the new guidance tool.</td>
</tr>
<tr>
<td>2.1</td>
<td>March 2017</td>
<td>March 2017</td>
<td>Additional detail about how to access the new guidance tool and translated documents.</td>
</tr>
<tr>
<td>2.2</td>
<td>June 2017</td>
<td>June 2017</td>
<td>Additional information about invalid characters in attachments file names.</td>
</tr>
<tr>
<td>3.0</td>
<td>June 2018</td>
<td>June 2018</td>
<td>Updated for the new corporate dashboard and new ORS. The process to submit to investors and customers has also been updated.</td>
</tr>
<tr>
<td>3.1</td>
<td>2 July 2018</td>
<td>2 July 2018</td>
<td>Added new information about the export to Excel feature of the ORS.</td>
</tr>
<tr>
<td>3.2</td>
<td>6 July 2018</td>
<td>10 July 2018</td>
<td>Added ‘Organization details’ and ‘Primary sector’ dashboard page information, Add New User and Remove user details, sign in tips, new information about accessing your submitted response, and extra route to</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>change your password.</td>
</tr>
<tr>
<td>---</td>
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<td>-----------------------</td>
</tr>
<tr>
<td>3.3</td>
<td>17 July 2018</td>
<td>17 July 2018</td>
<td>Information on the newly released 'Formatted response' function (for submitted responses).</td>
</tr>
<tr>
<td>3.4</td>
<td>1 Aug 2018</td>
<td></td>
<td>Information about import functionality.</td>
</tr>
<tr>
<td>3.5</td>
<td>March 2019</td>
<td></td>
<td>Information on new functionality for copy forward, the audit log, paging on dynamic tables, floating navigation bar, and export and import to Excel and Word. Additional information regarding file names and the guidance tool.</td>
</tr>
<tr>
<td>3.6</td>
<td>June 2019</td>
<td>June 2019</td>
<td>Added process to change version. Linked guidance for paying admin fee. Minor edits and ordering changes.</td>
</tr>
<tr>
<td>3.7</td>
<td>August 2019</td>
<td>August 2019</td>
<td>Minor edits to submission troubleshooting section.</td>
</tr>
</tbody>
</table>
Guide to using the disclosure platform

Introduction

Organizations are asked to respond to the information requests using CDP’s disclosure platform. This is the only way to provide the requested data to CDP and the requesting stakeholders.

The disclosure platform consists of the Dashboard and the Online Response System (ORS). The Dashboard is a portal containing pages such as the response dashboard which contains information regarding which questionnaires your company is being requested to respond to and a link to activate these, and your user account page, and where relevant the, Supply Chain Member, Reporter Services dashboards and investor dashboard. The ORS is where you can input information into your questionnaire(s).

Please note that the disclosure platform works best with Google Chrome. You can use other browsers, however there may be some loss of functionality.

If you are experiencing difficulties using the platform (i.e. error messages on the website), we advise you to follow these steps before contacting CDP:

1. Sign out of the ORS and the Dashboard
2. Delete your cookies and browser history
3. Refresh your browser and try signing in again

If you are still experiencing difficulties, please contact your account manager or local CDP office with details of the actions you are taking and screenshots of any error messages. You can find your local office contact or Account Manager on the dashboard. If you do not have an account manager or local CDP office, please email respond@cdp.net.
The basics
Register, confirm, and sign in

At the start of each disclosure year, CDP sends an invitation email to nominated contacts at organizations requested to respond by investors and/or customers, and self-selected organizations, with relevant information and an activation link.

- If this is the first time you have used CDP, either because it is the first time your organization is participating, or the first time you are responsible for supplying information on behalf of your organization, the activation link will take you to the registration page (where you create your password).
- If you responded to a CDP program in a previous year, or you have registered via the website independently, you will be in our database and the activation link will take you to the sign in page (where you can sign in using your existing password).

If you are using the activation link to register for the first time, create a password and click ‘Register’ (your email address, organization, and name will be prepopulated):

![Registration Form](image-url)

After creating your password and clicking “Register”, you will be redirected to the screen shown below. Next, you must complete your registration using the confirmation link emailed to the address that was prepopulated. Please remember to check your junk mail.
If you have not received the confirmation after 30 minutes, please use the Resend registration or confirmation link, also found on the sign in page.

After successful confirmation you will see a red notification banner, and the sign in page.

Once you have registered and confirmed, access your corporate dashboard using the icon on any page of the CDP website. You cannot use your confirmation link to sign in again.

Please contact respond@cdp.net if you have any problems registering, if you have not received the invitation email, or would like your organisation to respond. Please note that you should not copy and paste your email or password into the fields as spaces that may be copied in will mean your details are not recognised.

Your Response dashboard

If you are a nominated contact for the current disclosure year, on signing in you will see your response dashboard.

The main page, contains various features such as:

1. Need help icon (a) and bar (b): guide you to the contact details of your account manager, or the CDP office that you should contact if you have any queries.

2. Initials icon and dashboard menu: allows you to navigate between the pages of your dashboard, e.g. the guidance tool, or sign out.

   Main Users also see two extra options in the menu:

   - Organization details: check details for your organization such as website and address.
   - Primary Activity: view the classification for your company

3. Jump to… menu: use this to navigate to different blocks on the page.

4. CDP program tiles: indicate the programs that your organization is requested to complete:

   - If you are requested the tile is clear and the arrow is coloured.
   - If you are not officially requested, ‘Volunteer’ will show at the bottom of the tile for the Main User, and you can opt in.
5. **Users block**: indicates your permissions concerning the current questionnaires. See the 'User types' section for more on user permissions.

6. **Program blocks**: confirm your participation, access the ORS (after confirming participation), and see which stakeholders have invited you to complete the program.

7. **Previous scores and responses**: a list of all questionnaires that your organization has been requested to participate in, past (2010 onwards only) and present. You can click on the response name to view any questionnaires that were submitted. If you would like participation information for your organization before 2010 please contact your account manager.

8. **Announcements block**: important news and updates related to CDP and CDP initiatives.

9. **My Files**: allows you to access any score feedback information available for your organization. Additional files may be added in the future.

10. **Search for Corporate Responses**: search participation history for your, or any other, organization.
Changing language

If you wish to change the language that you see in your dashboard and the ORS you can do this from your dashboard using the ‘Language’ drop-down. You may need to sign out of the ORS, and enter it again from the dashboard, for the change to occur.

You can continue to answer your questionnaire(s) in English even if you are viewing the questionnaire in another language.

⚠️ If your response is in any language other than English, it may not be scored. Please check with your account manager, or local CDP office.

Guidance tool

To access the corporate guidance tool, which contains all of CDP’s corporate guidance documents, recorded webinars, and translations, you will first need to sign in to the CDP website. Then, go to your initials icon menu, and click ‘Guidance tool’:

The guidance tool enables you to search for guidance by:

1. **Program**: here you can filter CDP’s guidance by the program to which you are responding to and by year;
2. **Category**: here you can specify the type of guidance you are looking for (e.g. ‘Questionnaires’, ‘Reporting Guidance’, ‘Scoring documents’, ‘Technical information’, ‘Recorded webinars’, etc.);
3. **Keyword**: if you already know what you are looking for, you can also search by keyword here;
4. **List**: scroll through an alphabetical list of guidance documents before or after refining your search.

To access translated documents, please see the instructions on the guidance tool page.

You can also access a selection of CDP’s guidance and resources via the public guidance page.
Changing your password

To change your password, navigate to your Account page from the drop-down menu shown when you click on either:

- Hello [your name]; or
- Your initials icon (both of which are in the top right corner of the page).

On your Account page, you can change your password in the bottom half of the ‘Details’ block:

You will then receive a confirmation banner and are redirected to the CDP’s main website page:
To return to your preferred page, e.g. response dashboard page (where you can access the questionnaire(s)), simply select ‘Response dashboard’ in the drop-down menu.

There is also a ‘Forgotten your password?’ link on the sign in page.

**User types**

A contact may be one of three user types, each with different permissions. There is also an additional user type that a non-listed contact can be granted. User types are for the current year only, therefore the listed contacts will not automatically be those user types the following year(s). For further information please read the 2019 User FAQs.

You can check which contacts at your organization have which user types via the ‘User’ block on the response dashboard:

These are the permissions associated with each user type:

- **Main User:** The Main User is responsible for the organization’s response(s). **There can only be one Main User per organization and year.** The Main User can access the response(s) in the ORS, enter and save data, generate and share a ‘read only’ link, and are the **only contact that can submit** the questionnaires. This user should **not** be a consultant.
The Main User also controls access rights to the ORS on behalf of the organization and can also add or remove contacts (for the current year) via their ‘Users’ block. They can also change the roles of other users (as per the links shown in the illustration above), including transferring Main User rights to a colleague. Please note that the ‘Make Main User’ link will only be active if that contact has registered, and that added contacts should be from your own organization.

To become the Main User for your organization, please follow the steps outlined in step 3 of ‘Activating your questionnaire’.

Please note that as the Main User your details will be stored in CDP’s systems. To change the Main User, the current ‘Main User’ will need to go to the Users section of their dashboard and select ‘Change to Main User’ to update details. If there is not currently a Main User and you are a contributor, in the Users section click ‘Become Main User’ to change the Main User. The new Main User will then be requested to complete the confirmation screen. If the original Main User has left the organization please contact respond@cdp.net.

**Contributor(s):** Users with the Contributor role can access the ORS, enter and save data, generate and share a view only link, but cannot submit. There can be many Contributors and this type of user can be a consultant. This type of user role can be used to collaborate with multiple colleagues, who can all directly access the Online Response System.

**View only user(s):** This type of user role can be used for sharing the response(s) with colleagues for review or sign off purposes. They cannot enter data, save, share, or submit. There can be many View only users.

**Subsidiary contact:** This type of user role is only relevant where a parent company is responding on behalf of a subsidiary company who has also been requested to respond to CDP. Contacts from the subsidiary organization will have this user role and will be listed on the User block, but will only be able to see the program blocks of the parent company. Any users with the subsidiary contact role will not have access to the ORS and cannot activate or contribute to the company’s response(s). If a subsidiary contact requires access to the ORS they can request to become a contributor by the Main User. Please note subsidiary contacts will see information in the “Scores and Responses” section relating to their own company.

Main Users and Contributors can generate a read-only link that can be shared with colleagues who are not Users. Within the ORS there is a “Share” button. Please note that links have expiry dates. If your colleague needs to be able to view the response at any time before submission, they should become a View only user.
Your request(s) – getting started

Organizations need to activate their questionnaire(s) each year and for each requested program. CDP will notify you when this can be done.

What are you being requested to do?

As explained in the ‘Your dashboard’ section, you can see which programs you are requested to respond to via the program tiles. You will also only see program blocks for the questionnaires you are requested to complete.

Who has requested your participation?

In the program block you can see who has requested you to provide environmental information via that program.

You may have been invited by:

- **CDP’s investor signatories**; and/or
- **Customers**: organizations are requested by their customer(s) – one or more of CDP’s Supply Chain Member(s). Note: if you are responding as a Self-selected company, you will see the information relating to submission to CDP’s investor signatories.

To see your requesting customer(s), click the ‘request/s’ link for more information (including an email address you can use to contact your customer).

When is the deadline?

The deadlines are shown in the relevant program block.

If you have arranged an extension with CDP this will be displayed here.
Activating your questionnaire(s)

Organizations need to confirm participation before they can access their questionnaire. To confirm your participation and to access the questionnaire, click ‘Confirm participation’ in the questionnaire block.

1. Click ‘Confirm Participation’ in the relevant program block.

2. Confirm to whom you will submit data and click ‘Confirm’ or click ‘Skip’ to choose this later.

⚠️ By clicking ‘Skip’ you can still proceed with activating your questionnaire. Once you have confirmed participation here it cannot be changed but does not impact your final submission options. If you do not wish to confirm participation and activate your questionnaire, please click ‘Cancel’.

⚠️ You will see this pop-up if you are responding to the climate change or water security questionnaire, or the forests questionnaire at the request of investors only (depending on who is requesting your participation you will see one or two ‘We intend to submit to…’ tick boxes):

⚠️ You will see this screen if you are responding to CDP’s forests questionnaire and responding to customers and investors, or customers only (with extra selection boxes regarding which commodities you will answer questions about):
3. The Main User for your organization in the current year will see this screen (for other users skip to step 4). The screen outlines the permissions and responsibilities of the Main User. It explains that you will be the 'Main User' for ALL responses in the current year, and the permissions this gives you. If you are the Main User, please select "I confirm" before continuing. If you have been requested to respond by your customer(s), you will see a tick box asking for consent to share your contact details – we recommended you consent to enable better communication with customers. For benefits of sharing your contact details with requesting customers, please see our FAQ "What does CDP do with my contact details".
4. The next page is your ‘Check organization details’ page. Please confirm the information is correct, or edit or add any missing information you wish to provide and click ‘Next’:

   ![Check organization details page]

   If you use the ‘Return to dashboard’ link, the program block will show that you have confirmed participation and will have a ‘Continue’ button for you to complete this your organization details later.

5. The next step is to confirm the version of the questionnaire you will complete either: minimum or full. If your organization is not eligible to complete the minimum version, you will not see either of these pages (skip to step 6).

   If your organization is eligible for the minimum version of the questionnaire, you will see this page, the option to complete the minimum version is available according to your revenue answer. Please select minimum or full and click ‘Next’.
If you click ‘Yes’ you will be given the option to choose between the full or minimum version of the questionnaire. If you click ‘No’ you will see a message informing you that you will be completing the Full version.

If you use the ‘Return to dashboard’ link at this stage, the program block will show that you have confirmed participation and will have a ‘Continue’ button at the previous stage for you to continue later, as below.

If you are eligible to complete the minimum version, you have the option to change your selected tier at any stage prior to submission via your questionnaire block. Clicking the drop-down arrow highlighted below. Select which version you wish to complete and hit save.

Important note: No sector-specific questions are included in the minimum version. Responses to the minimum version will only be scored in certain circumstances. Please see our Scoring Introduction for more information on scoring eligibility.
6. The final page contains information on your organization’s classification and questionnaire sector. Please click the Full list of sector classifications for more information about CDP’s activity classification system (CDP-ACS).

You will be presented with one of the following versions of this page depending on your organization’s status. Once you have read the page, and completed any necessary parts, click ‘Start Questionnaire’.

If CDP has already classified your organization, you will see this page. The ‘Why have I been allocated this sector?’ link can be clicked to reveal a table with more detail. If your organization’s primary activity under CDP-ACS maps to sector questions, as well as the general questions, you will see this information on this page. Your response will be scored based on your response to the general questions, plus sector questions indicated if relevant.
If you will only see general questions, you will see this screen:

You will receive a score based on your response to

**General**

Not all responses will be scored in 2019, [click here](#) for further information. The minimum version of the questionnaire does not contain sector-specific questions.

To discuss changing your questionnaire sector, or Primary Activity under CDP’s CDP-ACS classification system, please contact your local CDP office.

**Why have I been allocated this sector?**

- **CDP-ACS Industry**
  - Services

- **CDP-ACS Activity Group**
  - Other services

- **CDP-ACS Activity**
  - Education services

[Full list of CDP-ACS Classifications](#)

[Return to dashboard](#)

If your sector requires you to complete an additional sector module (as well as the general questions) you will see this indicated on this page, which will look similar to this:

**MATERIALS**

**METALS AND MINING**

You will receive a score based on your response to the following sector specific questionnaire:

**Metals & mining**

Not all responses will be scored in 2019, [click here](#) for further information. The minimum version of the questionnaire does not contain sector-specific questions.

To discuss changing your questionnaire sector, or Primary Activity under CDP’s CDP-ACS classification system, please contact your local CDP office.

**Why have I been allocated this sector?**

- **CDP-ACS Industry**
  - Fossil fuels

- **CDP-ACS Activity Group**
  - Coal Mining

- **CDP-ACS Activity**
  - Coal Extraction

[Full list of CDP-ACS Classifications](#)

[Return to dashboard](#)
If your organization has not already been classified, you will be required to select your primary Industry, Activity Group and Activity on this page (you can only select one sector). If you are responding to Investors only please contact your account manager (found via the ‘Need help’ bar on the corporate/response dashboard) to update your Primary Activity. Once you have completed the columns the ‘Start Questionnaire’ button will turn red and you can move forward.

7. Clicking ‘Start Questionnaire’ opens your questionnaire in the Online Response System (ORS) in a new tab or window.

8. Back on your dashboard your program block will now look like a version of this:
<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation Confirmed</td>
<td>Completed March 22, 2019</td>
</tr>
<tr>
<td>Organization details confirmed</td>
<td>Completed March 22, 2019</td>
</tr>
<tr>
<td>Submission to CDP's investor signatories (panel of 525+)</td>
<td>Due July 31, 2019</td>
</tr>
<tr>
<td>Submission to your customers (I request/s)</td>
<td>Due July 31, 2019</td>
</tr>
</tbody>
</table>

Click 'Continue' to access the ORS

Date and tick when completed

Click arrow for more info
Your Online Response System (ORS)

Clicking ‘Continue’ on the program block will take you to the ORS. The ORS opens in a new tab or window, therefore please ensure that **pop-up blockers** are switched off.

⚠️ The ORS is most compatible with Google Chrome. It does work with other internet browsers, but functionality will be restricted.

The ORS homepage

The first page you see is the ‘Welcome’ page for that questionnaire:

The ORS homepage

The first page you see is the ‘Welcome’ page for that questionnaire:

You can see the following main features here that you will also see throughout the ORS:

1. **Exit ORS:** This signs the user out of the ORS. You can then close that tab or window. Please note, you may still be signed in to the dashboard.

2. **Dashboard links:** These buttons link back to the relevant parts of your dashboard, where you can perform the action required.

3. **Save, Share, and Submit:** ‘Save’ saves all changes, ‘Share’ generates a link to a ‘View Only’ copy of the questionnaire to share with a non-user, and ‘Submit’ will submit the questionnaire. Depending on your user type you may see all, some, or none of these permissions. See the ‘User types’ section for more on user permissions.
4. **Export**: This button allows users to export the questionnaire, including all responses entered, as a Word or Excel document. Please see the [Exports and Imports section](#) below for more information.

5. **Audit Log**: This button takes the user to the audit log. It allows users to track all changes made in the ORS by any user. Please see the [Audit Log section](#) below for more information.

6. **Floating progress bar**: This indicates the number of questions you have saved an answer for so that you can track your progress. The progress bar now moves with the user, as you progress through the questionnaire. Please note, depending on your answers, the total number of questions may fluctuate. This is for your own tracking purposes only. For a more detailed description of which questions do or do not count into the progress bar, please see [page 43](#). The bar will show the number of unanswered questions however you will need to look back through your response to identify which questions have been left unanswered.

7. **Navigation menu**: Click the arrow and use the menu to jump between modules and pages. Click navigation from the progress bar to access the navigation menu.

8. **Previous, Next, and skip buttons**: These are used for moving between neighbouring pages or skipping to the start or end of the questionnaire. You should use these rather than your browser buttons. Please also make sure your page is saved before moving on.

9. **Copy Forward**: If a response was submitted to the 2018 questionnaire, the answers have been auto-populated in your 2019 questionnaire where applicable. This icon will show for auto-populated answers. Please review auto-populated answers carefully, it is your responsibility to ensure your answers are updated for the accuracy and completeness of your 2019 response. See the [copy forward section](#) below for more information.

**Navigating the ORS**

Users can navigate around the ORS in two ways:

- Clicking on the ‘Navigation’ button will open a menu on the left detailing the questionnaire sections available. Click on the relevant section to access it. To hide the navigation menu, simply click on it again.

- You can use the ‘Previous’ and ‘Next’ buttons at the bottom of the page to move between pages (see below in red). The skip buttons, in green below, allow you to jump to the ORS homepage and the submission page.

Please make sure you save regularly, before moving page and before logging out, as unsaved data cannot be recovered.

**Accessing guidance**

*Reporting guidance*

Throughout each program questionnaire, you can access that program’s reporting guidance via ‘Click here for guidance for this question’. When you click the option, choose the question number you are interested in and a new tab or window will open with the relevant guidance.

*Information icon*
For questions which are ‘Select all that apply’, you can also click the information icon for further guidance.

(C12.3) Do you engage in activities that could either directly or indirectly influence public policy on climate-related issues through any of the following?

- Direct engagement with policy makers
- Trade associations
- Funding research organizations
- Other
- No

Click here for guidance for this question

C12.3

Saving your response

‘Save’ button

The save button is located on the top left corner of each page. Please click the ‘Save’ button regularly, before moving page and before logging out, and in particular after entering significant data or attaching/removing documents. If you are planning to leave the response inactive, please use the ‘Save’ button before moving away, as the system may time-out after a long period of inactivity and data would subsequently be lost.

It is advisable to do this frequently to avoid the loss of data, e.g. due to time-outs. The green pop up messages, as shown below, will confirm once your data has been saved.

Autosave

There is an autosave function in the ORS in addition to the ‘Save’ button. The icon will appear next to questions where you entered data as you move through a page.

Please do continue to use the ‘Save’ button when entering large amounts of data, adding or removing attachments, navigating through pages, and before exiting the ORS.

In addition to the green ‘Saved’ icon, you may see an orange ‘Save in Progress’ icon. Please wait for that icon to change to the saved icon before continuing. If it does not change, there may be an issue with your internet connection or your log in session may have timed out, and the data you have recently entered will not be saved. Please sign out of the ORS and sign back in to continue with your response.
Copy Forward

If you submitted a response to the 2018 questionnaire, your answers have been **auto-populated** to your 2019 questionnaire where applicable. A copy forward symbol icon will show for **auto-populated** answers. Answers which were saved and submitted last year will copy forward for the relevant questions. Not all questions are suitable for copy forward.

In the Forests questionnaire, please note F0.5 is now a mandatory question if you have changed the commodities you are disclosing for this year, the information regarding the commodity will be copy forward however the name of the commodity will not and you may need to delete rows in ‘dynamic tables’. **If in 2018, you left the disclosing column blank for a forest risk commodity in F0.5, please ensure all your responses are updated, for 2019, with the correct forest risk commodity.** Please be aware that if a de-selection is made for a leading question in the current year questionnaire, follow up questions may still contain the prior year response and will need to be edited, as necessary.

Please note, comments are not auto-populated, however, if you press the copy forward icon, the comment from your 2018 response can be entered. Please note the Copy Forward function will not auto-populate attachments.

Please review auto-populated answers carefully, it is your responsibility to ensure your answers are updated for the accuracy and completeness of your 2019 response.
For relevant questions, when you click the copy forward icon you will see an overlay of your answer from last year. Where questions are not suitable for copy forward, the overlay will display the answers you entered for that question as a reference point. The red cross indicates that a question is not copy forward.

**Audit Log**

The Audit Log button is located at the top of the screen, there are two elements to the Audit Log:

- Answer Audit log
- Workflow Audit log

The Audit Log button is located at the top left of the screen, the user can see all changes made to the full response.

**Answer Audit log**

The Answer Audit log displays all changes made to the full response, when they were made and who they were made by. This also indicates how they were made. Source: indicates where a change has originated. Changes made by the Main User or a Contributor will display as “User”

In the Answer Audit Log the user name will appear User field, the source field will show UI (User Interface) where the User has made the change, Excel Import or Copy Forward campaign if these functions have been used.

The user is also able to view the Audit Log at the question level. This allows the user to see changes made to each question.
Workflow Audit Log

The workflow audit log shows changes according to the status change of your response. For organizations responding to both Investors and Customers; once you have submitted part of your response the summary column will change from draft to submitted, allowing you to submit your Supply Chain Module later. In the Audit Workflow Log, the User column shows who has made the change, note that the API_User is when CDP requests a status change.

CDP Forests Questionnaire 2019

State: Draft

<table>
<thead>
<tr>
<th>Workflow Audit Log</th>
<th>Answer Audit Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Time</td>
</tr>
</tbody>
</table>

Introduction module(s)

The first module of the questionnaire is the introduction. The introduction should be completed and saved before you complete the rest of the modules. This is particularly important for ‘leading’ questions in the introduction.

In the introductions of the questionnaires there is a lower and an upper limit for the reporting year questions (C0.2, W0.2, F0.2). The lower limit is: January 1, 2009 for Climate and Water; and January 1, 2011 for Forests. The upper limit is: cannot be on or after August 1, 2018 (this is not a hard limit). You will receive a warning message but will still be able to submit. There are also limits for the length of reporting year.

Leading questions

These are questions that will impact which questions or options will show later in the questionnaire. Please be aware of leading questions and check the corresponding reporting guidance for the pathways illustrating ‘leading’ questions and what impact they have on the rest of the questionnaire.

Question types and additional question features

Attachments

Some questions allow, or specifically request, attachments to be added to that question directly. Please click the information icon 🕵️‍♂️ for direction for that question. The turquoise ‘0/1’ counter is to
indicate the number of characters added to the field, not to indicate how many files are attached.

To attach a file, click the paperclip icon and you will see the upload pop-up:

Add your file via the right of the pop-up, and when it has uploaded the left will change from 'there are no files attached to this question' to 'Files attached to this question' and you will see the file listed. You can add more than one file at a time.

Click ‘Close’. The paperclip icon will now be blue. You cannot see directly from the ORS which files are attached. Click the paperclip icon to see your files, or to remove files.

There is a file size limit of 30MB. Please also ensure that the file name does not contain invalid characters (e.g. + % $ &), or the file will not attach.

Please always use the 'Save' button for the page after attaching or removing documents to ensure you do not lose any data, and so you can access the contents of your attached file via the ORS.

Please note we advise against importing attachments with characters in the file name. If the uploaded attachment has a character in the file name, the character will be lost when uploaded.

**Character limits**

Some questions ask for responses to be completed in text fields. There are character limits set for these fields which varies between questions.
The character limits that apply to each question are displayed on the text field with a counter for your convenience. The counter turns yellow when the limit is reached.

⚠️ Organizations are advised to enter their response to text fields into the ORS before gaining management/legal approval as character counts made within the ORS may differ slightly from those in Microsoft Word (due to formatting).

**Comment fields**
There is a comment field on some questions, accessed by clicking on a speech bubble icon. This is for specific purposes only, as set out in the guidance for each question.

**Single select questions**
Single select questions (i.e. it is not a multiple-choice question, so you can only make one selection) will show as ‘Please select’ if no answer was selected in the ORS.
**Drop-down options**

For some questions, your answer is restricted to one option from a drop-down menu. Clicking on the arrow to the right of the field will reveal the full list of options. For a description of the meaning of each option in the list please consult the reporting guidance. Organizations should select the option that best describes their situation. Please select from the categories provided whenever possible, and only select ‘Other, please specify’ when none of the listed options is appropriate. This greatly assists data analysis.

If organizations choose the option to select ‘Other’, a text box also appears. You must enter an answer in the text box for ‘Other’, for your answer to be valid.

**Numeric and percentage fields**

In numeric fields, only digits (and decimal points if applicable) are accepted. Commas will be added automatically. There are rules on the maximum number of digits and decimal places in these fields, which vary between questions. These are clearly listed in the reporting guidance. For percentage fields, there is no need to enter the percent symbol ‘%’, as this is indicated in the question for you.

**Tables**

Table columns can have any of the characteristics of other question types. Character limits and number ranges will be displayed. This includes ‘leading questions’ within columns and rows.

Some table questions have a fixed number of rows, and for others you can add additional rows. The ‘Add row’ function will be displayed where you can add extra rows.

Click on the ‘Add Row’ button to see your list of disclosing commodities based on selection in F0.5. Then select the commodity from the drop-down list. Repeat this procedure for each disclosing commodity. More than one row per commodity is allowed.
Please note that tables can be displayed in one of two formats:

- **Grid format** - a standard table view

| (C0.2) State the start and end date of the year for which you are reporting data. |
| Click here for guidance for this question |

<table>
<thead>
<tr>
<th>Start date</th>
<th>End date</th>
<th>Indicate if you are providing emissions data for past reporting years</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>MM/DD/YYYY</td>
<td>Yes</td>
</tr>
</tbody>
</table>

- **Vertical format** - In vertical format tables, rows are separated by a line

  ![Vertical format](image)

- **Dynamic Tables** - In dynamic tables, where more than 25 rows have been added these responses will be paged. The following icon will appear at the bottom of the table:

  ![Dynamic Tables](image)

**Framework alignment**

The Framework Alignment icon indicates if the question has a connection to any other frameworks external to CDP. For example, with the TCFD, SDGs, or the DJSI.

**Further information**

At the end of the questionnaire, in the Signoff section, there is an opportunity to provide any additional information or context that you feel is relevant to your organization's response. This field is optional and not scored (this includes any attachments added to the 'FI' field).
Share

You can share your response with other colleagues by clicking the share button at the top of the page in the ORS. This will generate a URL that will allow other users to see a “view-only” version of your response.

Signing out

To sign out of the ORS, save your current page and click ‘EXIT ORS’ in the top right corner.

You will receive the following message and you can now close the tab/window in which it appears.

However, you may still be signed in to the dashboard. You can sign out of your dashboard by returning to the tab/window you may still have open, or by going to http://www.cdp.net/, and selecting ‘Sign out’ in the top right drop-down menu.

To return to the ORS

To continue working on your questionnaire(s), please sign in to your dashboard at https://www.cdp.net/en/users/sign_in and click ‘Continue’ in the relevant program block.
Export your response(s) from the ORS

You can Export your questionnaire response to:

- Word
- Excel

Export to Word

Users can download their response from the ORS into Word. This function is for viewing only, you will not be able to import any changes made in Word back into the ORS. Please note the Word Export timestamp is GMT+1 (UK time).

How to export to Word

Click the Export dropdown and then select Word.

The following screen will appear. Select either Portrait or Landscape, CDP recommends exporting to Word in Portrait format. Click ‘OK’, the export of your response will now download. This can be saved and shared in a read-only format.

Export to Excel

Users can download their response from the ORS to a specially formatted Excel. This enables you to edit your response in Excel, save and reimport it into the ORS.

Please note that the Excel export will show you every question in the questionnaire. Please use the CDP Guidance to determine whether each question is relevant to your response.

How to Export to excel

To export the questionnaire into an Excel format that can be used offline, select the ‘Export’ button.

Once you click ‘Export’ you will see the options below. If you have already entered data and/or comments into the ORS and want to remove these from the export, then you can untick ‘Include data’ and/or ‘Include comments’. However, if you want the data and/or comments to be exported into the excel spreadsheet, then the relevant boxes should remain ticked.
You should then click “OK” and wait for the Excel spreadsheet to download. The download speed will vary and the download may take a while to complete.

### Reviewing questions in your Excel export

The Excel extract will show you every question in the questionnaire, each section of the questionnaire will be split into separate worksheets within the Excel. Please use the CDP Guidance to determine whether each question is relevant to your response.

Help text is still available in the Excel export. It will appear in an italicized grey font to differentiate it from the question text which is in black font. Please note links to guidance documents will not be displayed.

You can also find the question pathway in the Excel file help text. For example, in the question shown below, you should only respond to 7.1 if you have selected ‘Yes’ in response to 7.0.

### How to edit your Excel export

**Enter text**

You can type text directly into the text boxes. However, if you would like to copy and paste text from another source (e.g. Word or PDF document), please use the “Formula Bar”. Please note that if you have entered information into the ORS in a rich text field (i.e. a text field that allows formatting) and exported it to Excel, the cell will be locked in Excel and you will not be able to update it. If rich text fields are blank on export then they are editable in the excel document and the answers can be re-imported. Formatting then can be added in the ORS after.

Excel will not support all types of formatting. On text field there are character limits, which you can see to the right-hand side of each text field. In the example shown below, the character limit for question 1.0 is 5,000 characters.
Date fields
In places that ask for a date, please enter it mm/dd/yyyy. If you just enter a year an error will occur, so please ensure that you enter the field in correctly.

If your computer is set to UK format, date fields in the ORS will appear as dd/mm/yyyy.

Numeric fields
For questions that ask for a numeric value, please note the range that the value should fall into is displayed either to the right or underneath the field. In the example below, the numbers entered in these fields should be between 0 and less than 999,999,999.

Some questions contain calculation fields which are only displayed in the ORS and not in the Excel. These calculation fields are displayed as "Import to view calculation" text.
**Drop-down selection fields**

To select a drop-down field, first select the field and then select the arrow on the right to see the full list of options. Please note when selecting ‘Other’ an additional text box will appear beneath the field, where you are encouraged to provide an explanation.

![Drop-down selection fields example](image)

**Check-box fields**

Check-box fields appear slightly differently in the Excel export to the ORS, as they are shown as one field per option, with ‘Yes’ and ‘No’ drop-down options. Please note ‘No’ is the default selection here, which indicates an un-selected check-box.

![Check-box fields example](image)

**Add-row tables**

Add-row tables will appear with a pre-defined number of blank rows. This allows you to complete more rows of data as needed. You can identify the blank rows as those with ‘New row 1’, ‘New row 2’ etc. row headers. Rather than clicking ‘Add row’ as you would do in the ORS, simply complete the data directly in the blank rows made available.

**Attachments**

Please note attachments not visible in the Export.

**Adding comments**

Comments are not required for your response to CDP. The comment boxes provide additional space for you to give reference to the quality of your data, source or any other notes you wish to share. Please note that comments submitted on public responses will be public on your CDP response. Comments can be added into the Excel file where you see a small red arrow in the top right-hand corner. You will have a maximum of 1,000 characters.

![Adding comments example](image)

**Import your response (s) to the ORS**

To reimport your response from Excel into the ORS, select import at the top of the screen. Once selected, use the file finder to upload your file and click ok. Please ensure your Excel document you are re-importing is saved to xlsx.
Select “all pages” or the page you wish to import, ensure that the Import map is set to Standard.

Click ok, if the import has been successful you will see the following screen. Please note that even if some fields fail, the successful fields will still have imported into the ORS.
If the import fails, please download the import results file. In the import results file, look for the cells with the red triangle in the corner this indicates an error. Please review and amend these responses and reimport. Ensure mandatory questions are completed when importing into the ORS.

Please be aware some questions in the Excel may be hidden in the ORS if your answer to the lead question renders then hidden in the ORS. In the Excel it is possible to enter invalid dropdown answers based on the conditional logic. Please check through answers carefully once imported.

Your imported answers will now be displayed in the ORS. Your imported answers will be reflected in the Answer Audit Log.

**Submitting your response(s) – pre-submission checklist**

If you have been requested to respond to multiple programs (climate change, forests, water security), the associated questionnaires must be submitted separately.

If your organization is required to pay the disclosure administrative fee, the main user will need to complete this before being able to submit your response to an investor request. For information on how to pay the administrative fee please see the [How to process the disclosure administrative fee](https://www.cdp.net) guidance. Please see here for more information about the [Disclosure Administrative Fee](https://www.cdp.net).

If you are an overlap organization (submitting a response to both investors and customers), please see the [Submission guide](https://www.cdp.net).

Prior to submitting a questionnaire, you are strongly encouraged to review the content, paying attention to:

- **Spelling, grammar, and figures** (if applicable, e.g. emissions figures) are correct;
- Your answers adhere to the relevant reporting guidance document;
- Answers to questions are **not** provided in the ‘Further Information’ field, or as attachments, unless specifically requested;
- Web links and cross references are **not** used to answer questions; and
- The value ‘Other’ is selected in the drop-down list **only if no other option fits** your required value.

Only the Main User can submit the response and is therefore the only user that can see the submit button. If you need to [change the Main User](https://www.cdp.net), the current Main User can do this via their corporate dashboard, otherwise please contact respond@cdp.net or your local contact.
Making your submission choices
Before you can submit your response, you will be required to confirm:

- The language you are submitting your response in;
- Who you are submitting your response to (Investors and/or Customers);
- Acceptance of the terms for responding; and
- How CDP should handle your response.

How to submit your response

1. Navigate to the 'Submit your response' page at the end of the online questionnaire:

2. Select the language you are submitting your response in:

   ![Language Selection](image)

   **Warning:** If your response is in any language other than English, it may not be scored. Please check with your account manager, or local CDP office.

3. Indicate if you wish your response to be public or non-public:
For more information on the differences between a public and a non-public response, please see the Terms for responding that apply to the response you are submitting. You may also wish to view the Privacy Policy:

4. Confirm which stakeholders (CDP investors and/or your customer(s)) you are submitting to:

   If you are requested by CDP investors and your customer(s), and tick only one of these boxes you are required to answer an additional question about why you are declining to respond to one of your stakeholders:

   At this point, if you are submitting your response to your customer(s) you will also be asked if you wish to submit your supply chain module questions now or later:
5. The **final steps** are to confirm that you have read the **Terms for responding** and click ‘Submit’. If you accept the Terms & Conditions, tick the box, then scroll to the top of the page to submit.

![Submit button]

**Submission of your Supply Chain module**

If you are requested by Investors and your customer(s) and have already submitted the core questions but have chosen to submit your Supply Chain module later, then you will need to return to the ORS to submit these before the deadline indicated.

When you are ready, navigate to the 'Submit your response' page and complete the submission process by selecting ‘**Yes, submit Supply Chain Questions now**’ (all of your previous selections will remain the same, including your acceptance of the Terms for responding), then click ‘Submit Supply Chain Module’:

![Submit Supply Chain Module]

You will receive an additional ‘Thank you for your submission…’ email.

Back on your corporate/response dashboard the program block for your submitted response will look like a version of this:
Submission troubleshooting

The floating progress bar tracks questions completed. As a general principle, all questions that a company will get presented with, will count towards the progress bar (including potential sector specific or Supply Chain module questions). However, there are a few exceptions of questions that DO NOT count into the progress bar (for example, if they are only meant as an option to provide additional information if needed). These are:

- Climate Change: C4.2, C9.1, C-FI, SC0.0
- Forests: F-FI
- Water Security: W-FI, W11.2, SW2.1, SW2.2, SW2.2a

On the ‘Submit your response’ page of the ORS the following two mandatory questions count towards the progress bar:

- In which language are you submitting your response?
- Please confirm how your response should be handled by CDP.
  Note: the checkbox to confirm that you have read and accepted the applicable terms and conditions DOES NOT count into the progress bar).

Please note that you can still submit your response even if the progress bar is not at 100%.

If you are required to pay the disclosure administrative fee, please note that this must be handled by the Main User before the submit button will be enabled. To pay the administrative fee please see the How to process the disclosure administrative fee guidance. Please see here for more information about the Disclosure Administrative Fee.
Submission confirmation

Clicking ‘Submit’ will submit your response and take you to the ‘Thank you for your submission…’ page.

It provides useful information including:

- The Main User will receive an email confirming the submission.
  - Please set @cdp.net as a safe domain, otherwise the email may not be successfully delivered.
- Your response is submitted and is no longer editable, please see the section Amending your response.

Accessing your submitted response

Back on your corporate/response dashboard the program block for your submitted response will look like a version of this (depending on your options and choices). Any or your current users can view your submitted response in the new ‘Latest Submission Details’ section:
**Amending your response**

For any additions or alternations which need to be made after the submission deadline CDP offers two different amendment processes. Discloser amendments and the CDP amendment service.

To request an amendment the [amendment form](mailto:respond@cdp.net) must have been filled and sent to the account manager or [respond@cdp.net](mailto:respond@cdp.net) and the [amendment policy](mailto:cdpTest User Guidance Ocontact) must have been read.

This will provide you with information as to any incurred cost and the type of amendment you are eligible for.

**Discloser amendments**

Discloser amendments state is restricted to only allow certain data points to be editable. A response will be put into Discloser Amendments state if a company has requested an amendment through the amendment form for specific questions. These questions are free to amend questions. If a data point is free, it is a key data point which is an important metric but not in itself something which affects a score e.g. emissions figures. Scoring don’t look at the figure populated, just whether the figure is populated or not so if the figure changes, it wouldn’t change their score. Only non-scorable, critical data points should be available for discloser amendment. You can see a list of free-to-amend questions in the amendment policy. Once the discloser has made their amendments, they then re-submit their response again themselves. This should be done within 2 weeks.

A submitted response will appear to in the portal and ORS like this:
Once a CDP employee has placed the response in discloser amendments it will appear like this in the portal and you will be able to select continue and change your response as before. The response will then need to be resubmitted within two weeks, if it isn’t, the original submission will be used for scoring.

**CDP amendments**

CDP amendments is the state a response is in which allows CDP to amend a response. A response will be put into CDP Amendments state if a company has requested an amendment through the amendment form for specific questions. These questions are chargeable questions and will incur a fee to be paid before CDP can process the amendment.
Scores and Responses

This section allows you to access any of your organization’s submitted responses and scores (if applicable). Navigate to the ‘Previous Scores and Responses’ block and click on the questionnaire within the ‘Response’ column. The response will open in a new window. You can view your submitted response 24 hours after submission, in a web page viewable format (known as a ‘formatted response’) on your dashboard. This provides a formatted webpage of the all information you have provided. If you have submitted a response in a previous year (2010 onwards) you will be able to view these responses here.

You will be able to see your whole response, including the submission page, and the Supply Chain module (if relevant). Please note that:

- The submission page will always be hidden to any users viewing your response who are not within your organization, including requesting investors or customers.
- The Supply Chain module will be viewable to your requesting customers (Supply Chain Members) only. Please note that for certain questions, data will only be shared with the relevant customer. For more information on the difference between public and non-public responses, and for how the Supply Chain module is shared with customers, please see the Terms for responding.

The response will include all questions which were shown to you in the ORS even if no information was entered. Additionally, if a row or column was not shown to you in a table, e.g. a row for a particular sector that does not apply to your organization or because a previous selection determined that the column was hidden, it will appear in the formatted response as "Not applicable".

The menu on the left-hand side is expandable, click on the arrows to view questions within that module and navigate around your response. You can also export your response to PDF.
The disclosure administrative fee

There is an administrative fee of US$975/€925 (excl. any applicable taxes) for organizations responding to one or more of our investor requests on climate change, forests, or water security. The fee applies to organizations listed, incorporated or headquartered in Argentina, Australia, Austria, Bahamas, Belgium, Bermuda, Brazil, Canada, Cayman Islands, Channel Islands, Chile, Colombia, Denmark, Finland, France, Germany, Hong Kong, Iceland, India, Indonesia, Ireland, Italy, Japan, Luxembourg, Malaysia, Mexico, Netherlands, New Zealand, Norway, Peru, Philippines, Portugal, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UK or the USA.

We will introduce the administrative fee in additional countries in the future as reporting becomes standard business practice in them.

Your organization will be exempt from the fee if (1) it falls within one of CDP's investor samples and it has not submitted a response to any of CDP's questionnaires in the last three years, or (2) it is responding only to our supply chain request. A full list of organizations in our investor samples is available on our website. All Self-selected Companies (i.e. those that have not been requested to respond to an investor request but have chosen to do so independently, irrespective of any supply chain requests) from the countries listed above are required to pay the administrative fee whether or not they have responded previously.

You can check if the fee applies to your organization when you sign in to the CDP dashboard to disclose. When submitting responses through CDP's online response system, companies will be able to pay via credit card or generate an invoice to pay. You will have the option to make a subsidized, standard or enhanced contribution. For information on how to pay the administrative fee please see the How to process the disclosure administrative fee guidance.

CDP is a not-for-profit organization and to deliver our services at the necessary global scale we now require a small contribution towards our costs from both organizations and investors participating in our system.

If you represent an organization that is required to pay the administrative fee and would like to know more, please see our Admin fee FAQ page for further information.

Further help

For more information on responding through CDP please see the guidance tool in the program blocks of your dashboard and the corporate guidance page of our website.

If you have any problems in accessing or using the ORS, you can check our FAQs, or email your local CDP contact or respond@cdp.net with full details (and screenshots) of your issue.

Information on CDP's Reporter Services program can be obtained by contacting the team at
This program provides one-to-one support from a dedicated CDP account manager to help you improve your CDP reporting and environmental practices via data and insights.

CDP also has a number of [accredited solutions providers](mailto:reporter.services@cdp.net) who can assist you in your response. We work with leading service and software providers that can support organizations in the collection, measurement, assurance, reporting and management of their climate and sustainability data. They can also support organizations in developing and implementing an appropriate climate change strategy to reduce their environmental impact and exposure.

All CDP operational partners have been selected based on partner, tool and service criteria. A full list of our accredited service providers is available [here](mailto:reporter.services@cdp.net).