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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>
</table>
Guide to using the disclosure platform

Introduction

States and regions are asked to respond to information requests using CDP’s disclosure platform. The disclosure platform consists of the states and regions dashboard and the Online Response System (ORS).

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 statesandregions@cdp.net.
The basics
Register, confirm and sign in

At the start of each disclosure year CDP sends an invitation email to nominated contacts associated to your state or region 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 state or region is participating, or the first time you are responsible for supplying information on behalf of your state or region, 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, complete the captcha, confirm you have read the terms & conditions/privacy policy and click ‘Register’. Your email address, organization, and name will be prepopulated:

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 you provided in the registration screen. 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.

Clicking the confirmation link in the email will redirect you to the sign in page on the CDP where you will see a red notification banner. You can now sign in using the password you just created.

To access your dashboard once registered, you can simply go to https://www.cdp.net/en/users/sign_in, or go to www.cdp.net and click on ‘Sign in’ on the top right-hand corner of the screen.

Please contact statesandregions@cdp.net if you have any problems registering, signing in or if you have not received the invitation email. Please note that you should type your email address and password manually. Do not copy and paste your email address or password into the fields as spaces may be copied in as well which will mean your details are not recognized.

Your states and regions dashboard

After signing in, you will see the main page of your account, or ‘States and Regions Dashboard’, as shown below. The dashboard contains various features such as:

1. **Initials icon and dashboard menu**: allows you to navigate between your account page and dashboard, access the guidance tool (which can also be accessed from the States and Regions block), or sign out.
2. **Jump to… menu**: use this to navigate to different sections of the dashboard.
3. **Users**: displays all users associated to the current questionnaire and indicates your permissions concerning the current questionnaire. See the ‘User types’ section for more on user permissions.
4. **CDP States and Regions 2020**: provides access to the ORS, displays the deadline and status of your response, and provides links to further guidance.
5. **Analytics and Insights**: directs you to an interactive tool based on self-reported public data of responses to CDP’s States and Regions questionnaire. This allows you to benchmark on climate change data points and track your region’s progress.
6. **Announcements**: provides important news and updates related to CDP and CDP initiatives.
7. **Webinar block**: find out about webinars related to CDP.
8. **Resources**: access additional guidance and support documents.

9. **Search for Responses**: search participation history for your, or other state and/or region.

10. **Need help bar**: displays contact details of your account manager, or the CDP office to contact if you have any queries.
Changing languages

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. For the change to be displayed in the ORS, sign out of the ORS and enter it again from the dashboard.

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

Guidance tool

To access the guidance tool, which contains all of CDP’s 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:

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

In addition, you can access a selection of CDP’s guidance and resources via the public guidance page. You can access this by clicking on the ‘Guidance & Questionnaires’ link on the top right of the dashboard screen or CDP website, then select the ‘Guidance for States & Regions’ page. Here you will be able to view the following:

- **The CDP States and Regions questionnaire**, which details every question in the questionnaire.
- **The CDP States and Regions reporting guidance** which explains each question in detail and describes what information to provide.

You can also access guidance documents from the CDP States and Regions 2020 block:
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. If your organization name, email address and details are incorrect please contact CDP at statesandregions@cdp.net:

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. 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 User FAQs. There is no limit to the number of users that can be added to your account.

You can check which contacts at your organization have which user types by expanding the ‘Users’ block on the response dashboard:

```
<table>
<thead>
<tr>
<th>User Type</th>
<th>Contact 1</th>
<th>Contact 2</th>
<th>Contact 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main User</td>
<td>Test User 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor</td>
<td>Test User 2</td>
<td>Change to View Only</td>
<td>Make Main User</td>
</tr>
<tr>
<td>View Only</td>
<td>Test User 3</td>
<td>Change to Contributor</td>
<td></td>
</tr>
</tbody>
</table>
```

**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 is the only contact that can submit the questionnaires.

Please note that the Main User for a questionnaire must always be a representative of that organization and should not be a consultant. Consultants can be contributors.

The Main User also controls user access rights to the ORS on behalf of the organization via the user block. As shown in the screenshot above, the Main User can add or remove contacts for the current year. They can also change the roles of registered users and nominate a new Main User.
Please note that only contacts who are registered on the CDP website will be showing, and that added contacts should be from your own organization.

As the Main User, your contact details (name and email) may be stored in CDP’s systems for record management.

To become the Main User for your state or region, please follow the steps outlined in ‘Activating your questionnaire’.

Changing the Main User

If you are the current Main User, go to the Users section of your dashboard and select ‘Make Main User’ to nominate a contributor to become the Main User. They will receive an email notification with instructions to follow and your role will change to contributor.

If the questionnaire has been activated but there is not currently a Main User and you are a contributor, in the Users section you can click ‘Become Main User’. You will then be requested to complete a confirmation screen.

If the current Main User has left the organization email statesandregions@cdp.net for the role to be reset.

Contributor(s):

Contributors can edit and save data, export and import data, and share data in the ORS. Contributors cannot to submit a response. Contributors can collaborate with multiple colleagues, who can all directly access the ORS.

There is no limit on the number of Contributors and this type of user is suitable for a consultant. For further information please read the User FAQs

View only user(s):

View only users can view responses in the ORS. View only users can be assigned to colleagues for review or sign off purposes. They can export responses but cannot enter, save, share, or submit data in the ORS.

There is no limit on the number of View only users. For further information please read the User FAQs.

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 so if a user needs to be able to view the response at any time, they should be a View only user.
Adding new users
Main users can add new users to the invitation via the user block on their dashboard. You can see if you are the Main User when you expand the user block. If you are the Main User you will also see the ‘Add New User’ button:

When you select **Add New User** you will be shown a form to complete. Please complete all the fields and select whether you want the user to be able to be a contributor (with editing rights) or a view only contact. When you click **Send invite** you will see a banner notification at the top and the new user will receive an email notifying that they have been added as a user and instructions to register, with the Main User in copy. The new user will only appear on the user block once they have registered their account.

When is the deadline?
The deadline for responding to the CDP States and regions questionnaire is shown in the program block.
Activating your questionnaire

States and regions need to activate their response each year before they can start responding to the questionnaire. Activate your response by:

1. Confirm your participation by selecting ‘Confirm participation’ in the States and Regions program block. Any user can confirm participation.
2. Confirm you are the Main User for your state or region. Tick you are authorized to be the Main User and click ‘Start Questionnaire’. This will open the questionnaire in a new window in the ORS. Your response is now activated.
If you decline to be Main User, you will be a contributor, which allows you to respond to the questionnaire. You will have to wait for the Main User to start the questionnaire before you can access the questionnaire in the ORS.

**Your Online Response System (ORS)**

**The ORS Homepage *NEW 2020 FEATURES***

The ORS will open in a new tab or window in your browser, therefore please ensure that **pop-up blockers** are switched off, or that cdp.net is set as an ‘allowed’ domain.

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

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

1. **Exit ORS**: where you sign out of the ORS. You can then close that tab or window. Please note, you may still be signed into the dashboard.

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

3. **Save, Share & Submit**: 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. Using ‘Save’ displays a warning for parts of questionnaire not yet completed, or that have an error.

4. **Import/Export**: These buttons allow users to export and import 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 blue progress bar**: This tracks questions completed by indicating the number of questions you have saved an answer for so that you can track your progress. Please note, depending on your answers, the total number of questions may fluctuate. This is for your own tracking purposes only, you can still submit your response even if the progress bar is not at 100%. Please note that some questions
are not counted in the progress bar however questions on the ‘Submit your response’ page are counted.

7. **Navigation menu** *NEW 2020 FEATURE*: Click the arrow and use the menu to jump between modules and pages. It will also show you which sections have unanswered questions.

8. **Previous, Next, and skip buttons**: for moving between neighboring 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. The ‘Submit your response’ page has a greyed out Next button as there is no next page.

9. **Copy Forward**: If you submitted a response to the 2019 or 2018 questionnaire, your answers have been auto-populated in to your 2020 questionnaire where applicable. Please review the auto-populated answers carefully. It is your responsibility to ensure your answers are updated for the accuracy and completeness of your 2020 response.

This icon will show for answers that have auto-populated: See the copy forward section below for more information.

**Navigating the ORS** *NEW 2020 FEATURE*

Users can navigate around the ORS in two ways:

**Navigation menu:**

- Clicking on the ‘Navigation’ button will open a menu on the left detailing the questionnaire sections available. Click on the relevant section to be taken directly to that page. The navigation menu will auto-hide after you click your destination or if you click the cross in the corner.

- The navigation menu also has a tab which shows the number of unanswered questions within each section in red. Select the ‘All unanswered’ button to display how many unanswered questions there are in each section. By expanding the sections you can see a more granular breakdown within subsections. Depending on your answers, the number of questions may fluctuate. This is for your own tracking purposes only and you do not need to answer all questions in order to submit.

**Navigation buttons:**

- You can use the ‘Previous’ and ‘Next’ buttons under the progress bar to move between pages (see below in purple). The skip buttons (see below in orange) allow you to jump to the ORS homepage and the final (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 the questionnaire, you can access the reporting guidance for the specific question via ‘Click here for question level guidance’. When you click the question number in red a new tab or window will open with the relevant guidance.

Information icon
You can also click the information icon for more direction on some questions. For example, the information icon may tell you whether you should select one option, or all that apply.

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 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 Saved 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 a blue ‘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 2019 or 2018 questionnaire, your answers have been auto-populated into your 2020 questionnaire where applicable. A copy forward icon will show for all questions.

If you did not previously submit a response to a question or this is a new question no answers will copy forward. If you click the copy forward icon a message will appear outlining that no previous answers have been found.

When you click the copy forward icon you will see an overlay of your answers from last year. In the overlay you will see the answers you entered last year even if they are not copy forward. The red cross indicates where you entered information last year but do not copy forward this year.

Please be aware for Q5.4a/Q5.4b and Q6.1a/Q6.2, if you make a de-selection in the current year questionnaire, then the follow up questions may still contain the prior year’s 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 previous response can be manually copied forward. 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 response.

CDP has tried to ensure copy forward from your previous response is available where possible, however, some questions have been modified from last year’s questionnaire, and therefore not all fields may copy over. As a result, your data might only be available on specific fields within table questions. We encourage you to double check the response after copying to ensure that the response is complete and up to date.

Once the response has been copied into your questionnaire, you can add, edit and amend the data as necessary.

**Audit Log**

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

- Answer Audit log
- Workflow Audit log

The Audit Log is where the user can see all the changes made to the response by any user since the questionnaire was activated.

**CDP States and Regions Questionnaire 2020**

State: Draft

[Save] [Share] [Submit] [Import] [Export] [Audit log]

**Answer Audit Log**

The Answer Audit log displays all changes made to the answers in a response. In the Answer Audit Log the following will show:

- Date – the date the change was made
- Time – the time the change was made
- User – the name of the user who made the change will display
- Source – where the change was made. UI (User Interface) if a user has made the change directly in the ORS. excel Import or Copy Forward campaign if these functions were used.
- Question – the question which was changed. If it is for a table question, then the column name will also be displayed.
- Change type – the type of change made. This could be option added, option removed or value
Previous value – the previous answer for the question. This can be blank if it is the first time a change is made
Change – the new answer for this question

The user is also able to view the Audit Log for a specific question. This allows the user to see all the changes made to one question. Select the Audit log icon next to a question to view this.

**Workflow Audit Log**
The workflow audit log shows changes to the overall status of your response. Once you have made a change to the whole of your response e.g. you have submitted then workflow audit log will be updated, and the summary column will show this transition from Draft to Submitted. The User column shows who has made the change. Note that the API_User is when CDP has made a change to the overall status of your response due to a request from a user, e.g. the response was re-opened or amended. In this page you can view your response for each time the whole response was submitted by selecting “View” in the row of the submission you are interested in.

**Cultural settings *NEW 2020 FEATURE***

Cultural settings are a selection personal to an individual user that dictates how data is formatted and displayed. Cultural settings are only applied in the ORS and affect how numbers and dates are displayed to the current user. In the ORS you will see the following questions types adapt to the cultural setting selected:

- **Date questions:** Dates will be displayed in a format specific to the cultural setting selected. The cultural setting determines the order of the Days, Months and Years. You can see the format required in the answer box before an answer is entered. E.g.
\textbf{Numeric questions:} Numbers will be displayed in a format specific to the cultural setting selected. The cultural setting determines which decimal separator or group separator is used (i.e. a decimal point or other) and determines which group separator is used (i.e. a comma or other).

You can see the format required in the answer box before an answer is entered as a greyed out 123456.

![Example](example.png)

E.g. the decimal separator for English (UK) is a decimal point, and the group separator is a comma. Two-thousand and a half is displayed as 2,000.5

If you change the culture setting to French (France), the decimal separator is a comma, and the group separator is a space. Two-thousand and a half is displayed as 2 000,5

\textbf{Changing your cultural setting}

A user can select their preferred setting via their Account page in the dashboard. Select the initials in the top right-hand corner and select Account. Scroll down to the ‘Cultural Settings’ section. By clicking on the ‘Please select’ button you will get a dropdown of all the available cultural settings to choose from. After selecting the most suitable, please select ‘Update cultural settings’. You will see a red banner message indicating you have been successful. This will now have changed your settings in the ORS.

![Warning](warning.png)

To update your settings, you must first exit the ORS, change the selection and open the ORS again from your dashboard.

Your selected cultural setting does not affect other users working on the same questionnaire. If a user does not select their cultural settings, they default to a cultural setting depending on the language selected and the location of the user.
Changing your cultural settings will not change your language settings; you can set different language and cultural settings. If you do not make a selection, the default cultural settings will correspond with your language settings.

See appendix 1: Cultural settings for more information on cultural settings including a list of the default settings, a list of the cultural settings available for section and the full breakdown of how the cultural settings display in the ORS. Note that these settings do not apply to your formatted response or the dates on the dashboard.

For information on how cultural settings behave when exporting responses, please see the sections for word and excel exporting.

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 *NEW 2020 FEATURES*

Auto-calculation function *NEW 2020 FEATURE*
For some questions, there are numeric datapoints which the ORS will auto-calculate using applicable figures inputted in to other datapoints of the same question. These may be additions, multiplications or divisions. The auto-calculated field has a calculator icon. Please see the reporting guidance which will detail what data points are used for the calculation.

If any of the applicable fields have not been completed (i.e. are left blank rather than containing ‘0’) it will not auto-calculate and will display: Fields used in this calculation are unanswered

If you receive an error message, please check/correct the figures you have inputted alongside the reporting guidance which will detail the calculation for the question.
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 character 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 ‘Choose files’ in 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* *NEW 2020 FEATURE*
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. If the limit is exceeded the counter and text box will turn red and you will not be able to submit your response.

When copying and pasting text into a question the same character limits will also apply as above.

![Character limit exceeded](image)

⚠️ 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 'add comment' field on some questions, accessed by clicking on a speech bubble icon. Additional comments are not required for your response to CDP. These 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.

![Comment fields](image)

*Date fields*
In date fields, only digits and / are accepted. You can either click the calendar icon in the field and select the date, or you can free type the date in based on the cultural settings you have selected. To delete a date, hover over the box and click the small cross.

Please note if a date field does not have any data entered, a greyed out ‘MM/DD/YYYY’ (depending on your cultural settings) will display as default.
Numeric and percentage fields

In numeric fields, only digits (and decimal points if applicable) are accepted. Group separators will be added automatically based on your set cultural settings. There can be rules set 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.

Please note if a numerical field does not have any data entered, a greyed out ‘1,234.56’ will display as default, with the group and decimal separators displaying based on your cultural settings.

Pick lists *NEW 2020 FEATURE*

Some questions and data fields have a pre-defined list of options to select from. These come in a variety of formats:

- **Single-select buttons**
  
  Single option questions only allow you to make one selection. The selected option’s circle will turn blue with a dot. If you wish to remove your selection, click ‘clear selection’.
Multi-select checkboxes
Multiple option questions allow you to make more than one selection. Click an option to select or to unselect. The selected options’ checkbox will turn blue with a tick.

Single-select drop downs
For some questions, you can select options from a drop-down list. If it is single select, then your answer is restricted to one option from a drop-down menu. Selected options will resize once selected. If the option is not showing in full, when you select the option it will resize.

As a new feature for 2020, you can now dynamically search for an option by typing in the box. Alternatively, you can scroll through the list.

If you need to delete your selection, hover your cursor in the box for the delete button (a small cross) to show and click to remove your current selection.

Organizations should select the option that best describes their situation. For a description of the meaning of each option in the list please consult the reporting guidance. Only select ‘Other’ when none of the listed options are appropriate as this greatly assists data analysis.

If organizations choose the option to select ‘Other’, a text box also appears. You can use this field to specify details.
Multi-select drop downs
For some questions, you can select options from a drop-down list. If it is multi-select, then you can select as many options that apply.

As a new feature for 2020, you can now dynamically search for an option by typing in the box. Alternatively, you can scroll through the list. If you need to delete one of your selections, click the delete button (a cross) against the option.

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.

Tables which allow you to add rows, also allow you to delete rows.

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>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>MM/DD/YYYY</td>
</tr>
</tbody>
</table>

Indicate if you are providing emissions data for past reporting years

- Yes
- No

Clear selection

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

**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 so you can switch between the pages:

< 1 2 >

**Additional question features**  **NEW 2020 FEATURES**

- The current selected field will be blue-edged. Text boxes will auto-expand when being edited and a scroll bar will appear. Alternatively, you can manually expand the box by clicking and dragging the right bottom corner.

- All clickable buttons will go blue when the mouse hovers over.

- When copying and pasting data formatting will not be retained, except for rich text questions.
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 be logged in as [Your Name Here].

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

However, you may still be signed into 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/](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](https://www.cdp.net/en/users/sign_in) and click ‘Continue’ in the relevant program block.

Export your response from the ORS

You can export your questionnaire response to:

- Word
Export to Word

Users can download their response from the ORS into Word. This function is for viewing and sign off purposes 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. Users are able to edit answers in the excel, save them and import the changes into the ORS.
Please note that the excel export will show you every question in the questionnaire. Therefore, you may see questions which are hidden in the ORS currently due to conditional logic (e.g. some lead questions not selected). Please use the CDP Guidance to determine whether each question is relevant to your response.

ℹ️ Please make sure you have set your language before exporting your response to excel if you wish to import it after making changes.

**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 ‘excel you will see the options below. You can choose to export one section or the entire questionnaire. 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 as shown below. 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 3.3 if you have selected ‘Yes’ to question 3.1.

How to edit the excel

**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 see the message:

Rich text questions are read only in Excel once they have an answer in the survey.

If rich text fields are blank on export then they are editable in the excel document and the answers can be re-imported. Formatting can then 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 5000 characters.

**Date fields**

Dates will display or need to be entered based on your default excel country settings.
Once you import the file back into ORS, the data will display as per your ORS cultural settings.

Where a full date is required, if you just enter a year an error will occur, so please ensure that you enter the field in correctly.

**Numeric fields**

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

Numbers will display as per your default excel country and number format settings. Once you import the file back into ORS, numeric data will display as per your ORS cultural settings.

![Example of numeric fields](image)

Some questions contain auto-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.

![Example of auto-calculation fields](image)

**Drop-down selection fields**

To make a selection in a drop-down field, first click the field and then click 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.
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 checkbox.

**Add-row table questions**
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**
Attachments are not visible in the Export.

**Adding comments**
Additional 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 1000 characters.

**Import your response 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 as the format of ‘xlsx’.
Select ‘all pages’ or the section you wish to import and check 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 the error in a new Excel export and import this.

Please be aware some questions in the Excel may be hidden in the ORS if your answer to a lead question renders them 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.

Excel import best practice:
- Only use each Excel import sheet once to avoid duplicate rows in ‘Add row’ questions. If you need to do another import simply take a new Excel export first.
- Only use the Excel import short for the response you exported it from. Sheets cannot be shared between responses.
- If it has been a long time since you took your Excel export and your import fails, then you may need to take a new export.
- Ensure mandatory questions are completed when importing into the ORS.
- Make sure to double-check your data before importing.

Submitting your response

Prior to submitting a questionnaire, you are strongly encouraged to review your response, paying attention to:

- **Spelling, grammar**, and **figures** (e.g. emissions figures if applicable) are correct;
- Your answers adhere to the relevant reporting guidance document;
- Completeness: please make sure to answer as many questions as you can, even if the answer is ‘no’ or ‘I don’t know’;
- Web links and cross references are not used to answer questions; and
The value ‘Other’ is selected in the dropdown 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, the current Main User can do this via their corporate dashboard, otherwise please contact statesandregions@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;
- Acceptance of the terms for responding; and
- How CDP should handle your response (public or non-public).

How to submit your response (Main User only)
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:

3. Read and accept the Terms and Conditions and tick the box.

4. Indicate if you confirm to submit your response publicly:

For more information on a public response, please see the Terms & Conditions that apply to the response you are submitting. You may also wish to view the Privacy Policy.

5. The final step is to scroll to the top of the page and click ‘Submit’.
Submission confirmation
Clicking ‘Submit’ will take you to the ‘Thank you for your submission…’ page.

You will also receive an email from CDP confirming the submission and with information on next steps.

Your dashboard after submitting your response
Back on your response dashboard under the CDP States and Regions program block you can see your submission details and response under the ‘Latest Submission Details’ section. All users can view this information.

Viewing your response
After submitting you can view your submitted response in two ways:

In the ORS as a snapshotted response
If you wish to view your response in the ORS, first navigate to your response dashboard. Expand the questionnaire block and click the option to ‘view submission’.
Once in the ORS, to ensure you are viewing your submitted response correctly, navigate to the workflow audit log.

From here you can view your submission. You may see multiple submissions, e.g. if you have submitted amendments, so you can choose which submission you wish to view. Please note that the audit log is in chronological order with the newest changes at the top.

In the response search as a formatted response
You can view your submitted response in a web page viewable format (known as a ‘formatted response’) from your dashboard. Please allow up to 48 hours after submission for this to be processed.

Navigate to the ‘Search past CDP Responses’ section at the very bottom of the page and search for your state or region’s name. Once your search has returned your
responses, click on the questionnaire within the 'Response' column to open the response in a new window.

You will be able to see your entire response and the submission page.

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>.

Single select questions (i.e. it is not a multiple-choice question) will show as ‘Please select’ if no answer was selected in the ORS.

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.
Amending your response

If you need to make a change to your questionnaire response, please contact statesandregions@cdp.net to place your questionnaire in ‘Amendment Status’. This will change your dashboard screen from ‘Completed’ to ‘Amendment in Progress’ with the ‘Continue’ button. Your response will stay in ‘Amendment in Progress’ until you resubmit.

Once you access the ORS again from the dashboard, you may navigate the questionnaire as if it were unsubmitted, making the necessary change(s), however you will not be able to amend answers on the submission page. Both Main Users and contributors can edit, but only the Main User can submit the amendments. To do so, click the ‘Submit Amendments’ button.

After submitting the amendments, you will see the submission confirmation screen and your dashboard will display the questionnaire as submitted and you will not be able to edit it.

Further help

For more information on responding through CDP please see the guidance links throughout the ORS and the 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 statesandregions@cdp.net with full details (and screenshots) of your issue.
Appendix I: Cultural Settings
For more information on how cultural settings work, please see the section here.

Default cultural settings based on language/location:

<table>
<thead>
<tr>
<th>Language</th>
<th>Cultural Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>Within UK &amp; EU: English (United Kingdom)</td>
</tr>
<tr>
<td></td>
<td>Outside of EU: English (United States)</td>
</tr>
<tr>
<td>Spanish</td>
<td>Spanish (Spain)</td>
</tr>
<tr>
<td>Portuguese</td>
<td>Portuguese (Brazil)</td>
</tr>
<tr>
<td>Chinese</td>
<td>Chinese (Simplified)</td>
</tr>
<tr>
<td>Japanese</td>
<td>Japanese (Japan)</td>
</tr>
<tr>
<td>French</td>
<td>French (France)</td>
</tr>
<tr>
<td>Korean (Cities States &amp; Regions only)</td>
<td>Korean (Korea)</td>
</tr>
</tbody>
</table>

All cultural settings available for selection including a full breakdown of the display formats:

<table>
<thead>
<tr>
<th>Cultural setting</th>
<th>Decimal separator</th>
<th>Group separator</th>
<th>Example of numeric question</th>
<th>Date format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese (Simplified)</td>
<td>.</td>
<td>,</td>
<td>1,000.00</td>
<td>YYYY/MM/DD</td>
</tr>
<tr>
<td>Chinese (Traditional)</td>
<td>.</td>
<td>,</td>
<td>1,001.00</td>
<td>YYYY/MM/DD</td>
</tr>
<tr>
<td>English (India)</td>
<td>.</td>
<td>,</td>
<td>1,002.00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>English (Trinidad and Tobago)</td>
<td>.</td>
<td>,</td>
<td>1,003.00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>English (United Kingdom)</td>
<td>.</td>
<td>,</td>
<td>1,004.00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>English (United States)</td>
<td>.</td>
<td>,</td>
<td>1,005.00</td>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>French (France)</td>
<td>,</td>
<td></td>
<td>1,006,00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>German (Germany)</td>
<td>,</td>
<td></td>
<td>1,007,00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>Indonesian (Indonesia)</td>
<td>,</td>
<td>,</td>
<td>1,008,00</td>
<td>DD/MM/YYYY</td>
</tr>
<tr>
<td>Language (Country)</td>
<td>Date Format</td>
<td>Amount</td>
<td>Date Format</td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------</td>
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<td>--------------</td>
<td></td>
</tr>
<tr>
<td>Italian (Italy)</td>
<td>,</td>
<td>1.009,00</td>
<td>DD/MM/YYYY</td>
<td></td>
</tr>
<tr>
<td>Japanese (Japan)</td>
<td>,</td>
<td>1,010.00</td>
<td>YYYY/MM/DD</td>
<td></td>
</tr>
<tr>
<td>Korean (Korea)</td>
<td>,</td>
<td>1,011.00</td>
<td>YYYY/MM/DD</td>
<td></td>
</tr>
<tr>
<td>Portuguese (Brazil)</td>
<td>,</td>
<td>1.012,00</td>
<td>DD/MM/YYYY</td>
<td></td>
</tr>
<tr>
<td>Portuguese (Portugal)</td>
<td>,</td>
<td>1 013,00</td>
<td>DD/MM/YYYY</td>
<td></td>
</tr>
<tr>
<td>Spanish (Latin America)</td>
<td>,</td>
<td>1.014,00</td>
<td>DD/MM/YYYY</td>
<td></td>
</tr>
<tr>
<td>Spanish (Spain)</td>
<td>,</td>
<td>1.015,00</td>
<td>DD/MM/YYYY</td>
<td></td>
</tr>
</tbody>
</table>