SD-TOOL PROJECT PARTICIPANT USER MANUAL

Contents

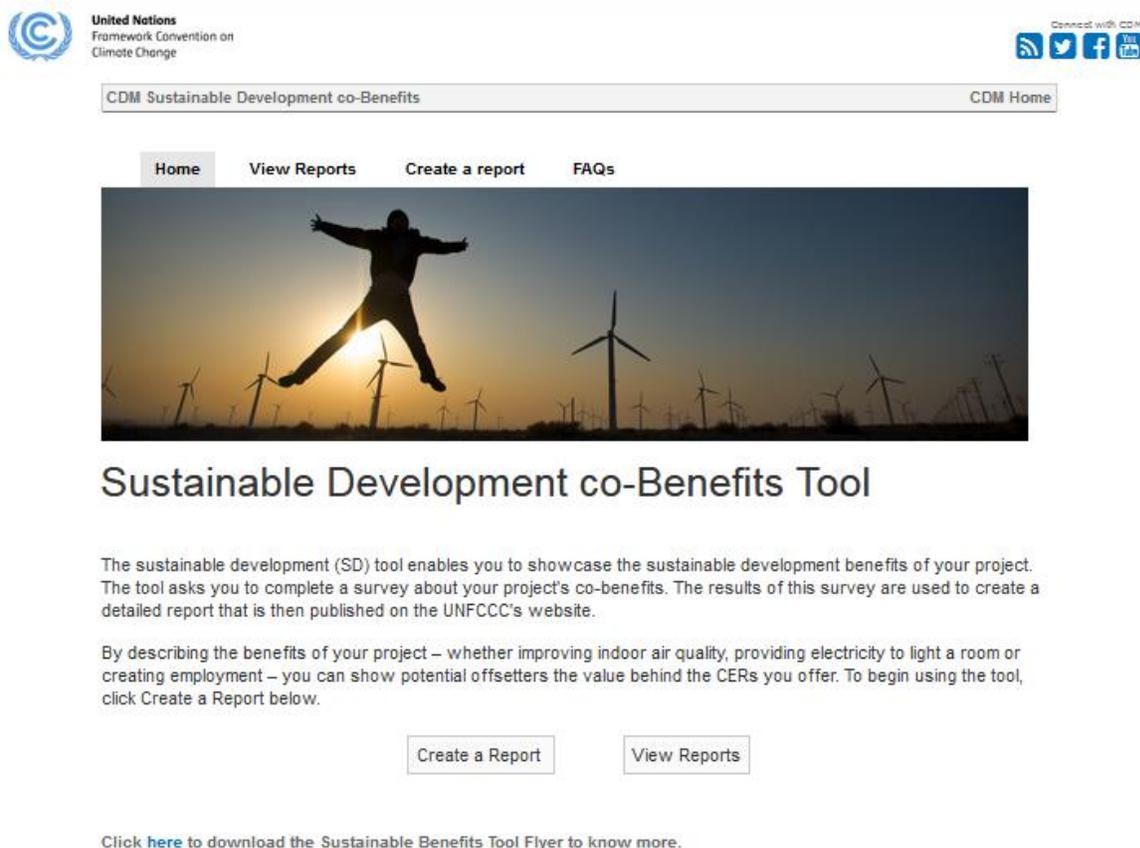# Introduction

This manual contains instructions for requesting access to a project, filling out information, and submitting and publishing co-benefit reports using the SD-tool Web Application (SD-tool).

The SD-tool allows project participants who have submitted prior consideration activities, projects or programme activities under the clean development mechanism report associated co-benefits.

The co-benefits reports will be made publicly available at http://cdmcobenefits.unfccc.int/Pages/SD-Tool.aspx/ after approval by the United Nations Framework Convention on Climate Change (UNFCCC) secretariat.

Figure 1: Clean development mechanism co-benefits homepage

How can I access to the SD-tool?

Access to the SD-tool requires an external users UNFCCC account. In case you do not have one, please proceed to https://userregistration.unfccc.int and follow the steps for creating an external account.

Working with the SD-tool

Accessing the SD-tool

Eligible CDM project participants (PPs) and coordinating/managing entities (CMEs) click the following link https://collaborate.unfccc.int/tools/cdm/sdtool and enter user name and password.

If your user name and password are correct, you will access the Home Dashboard.

Figure 2: SD-tool Home Dashboard

In the Home Dashboard, you will be able to:

- Request access to other projects and programmes of activities (1);
- Search projects using the reference number or key words from the title (2);
- Sort projects by reference number, project title, date of creation, status and percentage completed; (3)
- Different actions can be taken depending of the status of the report (4). Statuses include:
  - Draft: This is a new project report which has not been submitted for publication. When the status is 'draft', the SD-report is editable;
  - Clarification: The project report has been submitted for publication, but the reviewer requests further information. When the status is 'clarification', the SD-report is editable;
  - Submitted: This is a project that has been submitted for approval and publication. When the status is 'submitted', the SD-report is not editable.
  - Published: A project that has already been published can be revised and resubmitted again, yielding a new published version. When the status is 'publish', the SD-report is editable.
- View the Projects Table, which shows the list of available projects. (5)

Requesting access for an unlisted project

If the project table does not show a project, users can request access through the following button:

You will then be prompted to fill in the pop-up form:


Figure 3: Requesting access to project

Access to new projects must be approved by the UNFCCC secretariat. If your request has been accepted you will receive an email confirming the availability of the project in the Home Dashboard.

In case your project is not found, please request it to be added to SDTool by mailing to
sdtool@unfccc.int

Filling in or editing the SD-tool report

General Note: We recommend saving the report frequently (~5min) to prevent from data losses due to connection timeouts.

If you want to fill in or edit an SD-tool report, click the '**Edit**' button located on the right of the title.
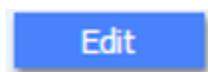
After clicking on the 'Edit' button, you will be redirected to the Questionnaire. The first step of the Questionnaire is the 'Contact information' form.
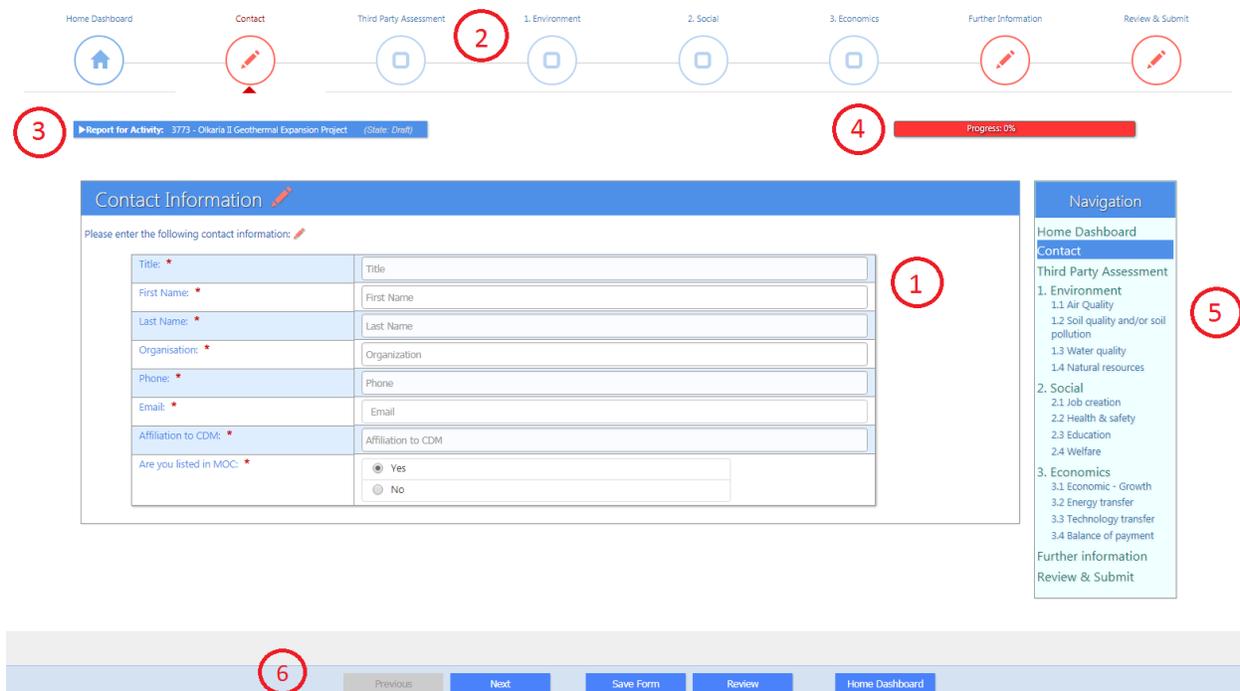
Figure 4: SD-tool edit view

The most important features and controls are:

- The **content area** displays the questions (1);
- The **breadcrumb navigator** allows the user to move along the different steps; (2)
- The **project title bar** displays the name and overall status of the project; (3)
- The **progress bar** shows the percentage completed (4);
- The **navigation menu** shows the editing stages and allows for click navigation. It may not appear on small screens (5);
- The **blue buttons** on the bottom allow for navigation and saving (6).

All forms from will contain: a breadcrumb navigator (2), a progress bar (4), a navigation menu (5) and blue navigations buttons (6).

Navigation rules:

- Fields which contains an asterisk (*) are mandatory and must be filled in before the report can be submitted. The user can navigate through the request by using the breadcrumb navigator (2), navigation menu (5) or blue buttons (6);
- The color of the breadcrumb navigator icons change depending on status of the step (blue: not started, red: in progress and green: done (see figure 7);
- Questionnaires do not need to be filled out in order, which means that you can fill out sections later if you do not have all.

After filling out all sections, you will reach the Review & Submit screen, which shows a list of all sections and the status of completion. If a step is incomplete, it will be marked with a red mark.

Immediately after submitting the report, you will receive an email confirming that your report has been submitted and received. If you do not receive an email in the next hour, please check whether all the information is provided and click submit again. If you still do not receive feedback, contact sdtool@unfccc.int.

Within four days, you will receive a request for clarification or you will be informed that your report has been published in http://cdmcobenefits.unfccc.int/Pages/SD-Reports.aspx.

Finding a project in the project table

You can search for a particular project using the search field in the upper right of the screen, or you can click on the field titles to sort the projects (e.g. Ref. No., Project Title, etc.).
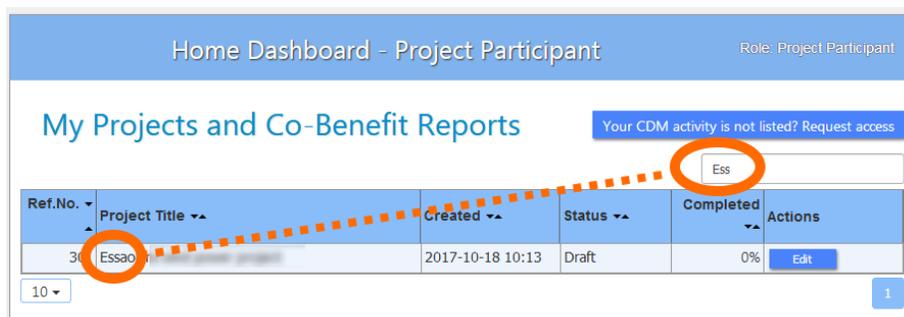
Figure 5: Searching for a project using the search field

SD-tool in detail

Moving through a project

The first step in the Edit view is 'Contact Information'. The questionnaire can be navigated most easily using 'Next' button at the bottom of the screen. Alternatively, you can navigate through the questions by clicking on steps in the breadcrumb navigator or in the navigation menu.

The major steps are:

1. Contact Information: Provide details about the project's contact person.
2. Third-party assessment: Have the statements in the report been verified or can they be verified by a third party?
3. Environmental co-benefits: What positive impact will the project have on the environment (subsections include air quality, soil quality, water quality and natural resources)?
4. Social co-benefits: What positive impact will the project have on society (subsections include job creation, health & safety, education and welfare)?
5. Economic co-benefits: What positive impact will the project have on the economy (subsections include economic growth, energy transfer, technology transfer and balance of payment)?
6. Further information: Provide additional benefits or other relevant information not covered before.
7. Review and submit: Check the completeness of report and submit it. You can also identify incomplete sections and access them directly.

The subsections on the environmental, social and economic co-benefits contain several more specific questions.

Answering questions

All questions of the questionnaire need to be answered in order to submit the report. The 'Contact information' step requires text input only. All other questions are answered using 'Yes', 'No' or 'N/A'.

As for the co-benefits, selecting 'No' or 'N/A' will disable the detailed questions.

Difference between answering 'No' and 'N/A'

The difference between 'No' and 'N/A' can be explained as follows:

- 'No' should be selected if the project does not support the co-benefit but there was a possibility to support it;
- 'N/A' should be selected if there is no relationship between the project and the co-benefit, and the co-benefit thus cannot be supported in any way.

By answering 'Yes', the bottom section will become active and you will need to select at least one co-benefit to continue.

Figure 6: If 'No' is selected

Figure 7: If 'Yes' is selected

Review and submit

The last step in the report preparation is to review whether all questions have been answered and submit the report for review by the CDM Programme Officer. If all sections are completed, the 'Submit this Co-Benefits Report' button becomes enabled and the report can be submitted. A preview PDF can be generated for the submitter's records.

Figure 8: Review and submit

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Clarification

If a report has been submitted for approval and publication, but the reviewer has further questions, then it will be set to 'Clarification' status. The project owner will receive a notification email asking the user to provide more details in the report.

Reports in the Clarification status can be reviewed trough the from the Review and Submit page. Additional red text boxes with the reviewer's comments point to the questions where the project owner should provide more details.
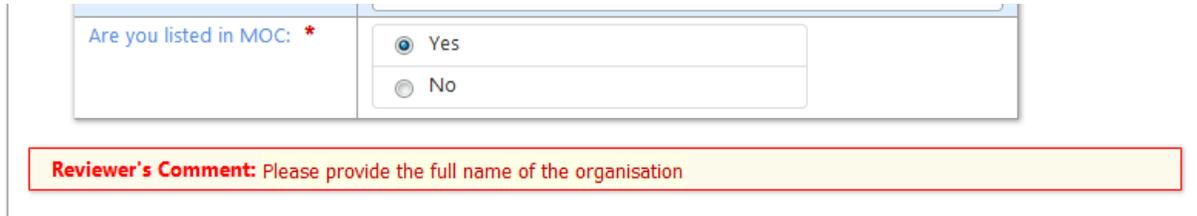
Figure 9: Clarification status: reviewer's comments

After the report has been revised it can be submitted again.

Email notifications

An email notification will be received by the user after each of these steps:

1) Access request has been approved.
2) Access request has been rejected.
3) Project has been submitted for approval and publication.
4) There is a request for clarification by the CDM Programme Officer.
5) The project has been published.

Apendix I - Definition of special controls

Progress and navigation

The SD-tool has several means to follow the completion progress.

The breadcrumb navigator shows a red arrow underneath the section currently being completed. Completed sections are shown in green, incomplete sections in red, and sections not started in blue. It is possible to move to another section or the Home Dashboard with a mouse click.

Figure 10: Workflow Wizard details

The Navigation Menu highlights the current section and can also be used for navigation. It may not appear on small screens. The Progress Bar shows the overall percentage of completed questions.

Figure 11: Workflow wizard details

The SD-tool shows the completion progress at several levels using different completion symbols to indicate progress. The red question mark indicates items that are not answered. The pencil marks items that require further information. The green checkmark shows that an item is completed.
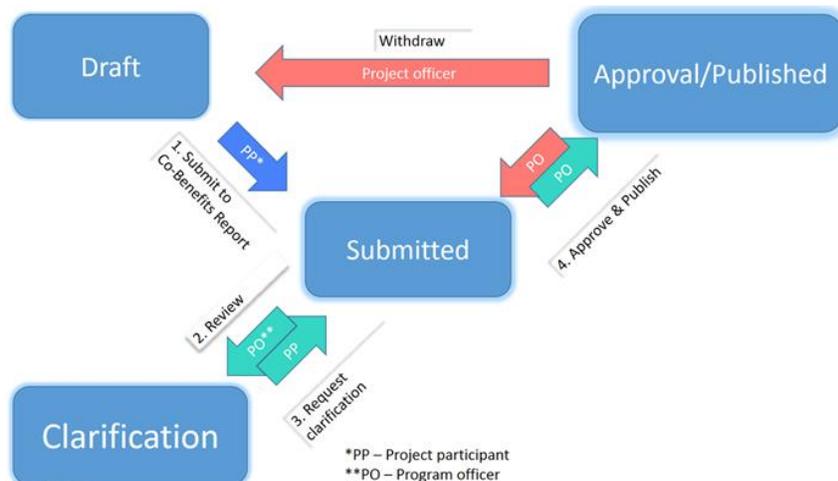

Figure 12: General completion symbols

Apendix II - Diagram of the process

Figure 13.   Diagram of the process