IDB Invest

CGTool

Client Quick Guide

Access, complete and submit your governance questionnaire



External users | Executive guide

01 | GET STARTED

First-time access

Open the welcome email

Open the portal using the provided link and **username**.
Platform access is limited to **three** company representatives.

Accept the terms

The first screen will show the terms and conditions for the CGTool
Read them carefully and click Next.



02 | HOME PAGE

Find your questionnaire

Go to Corporate Governance

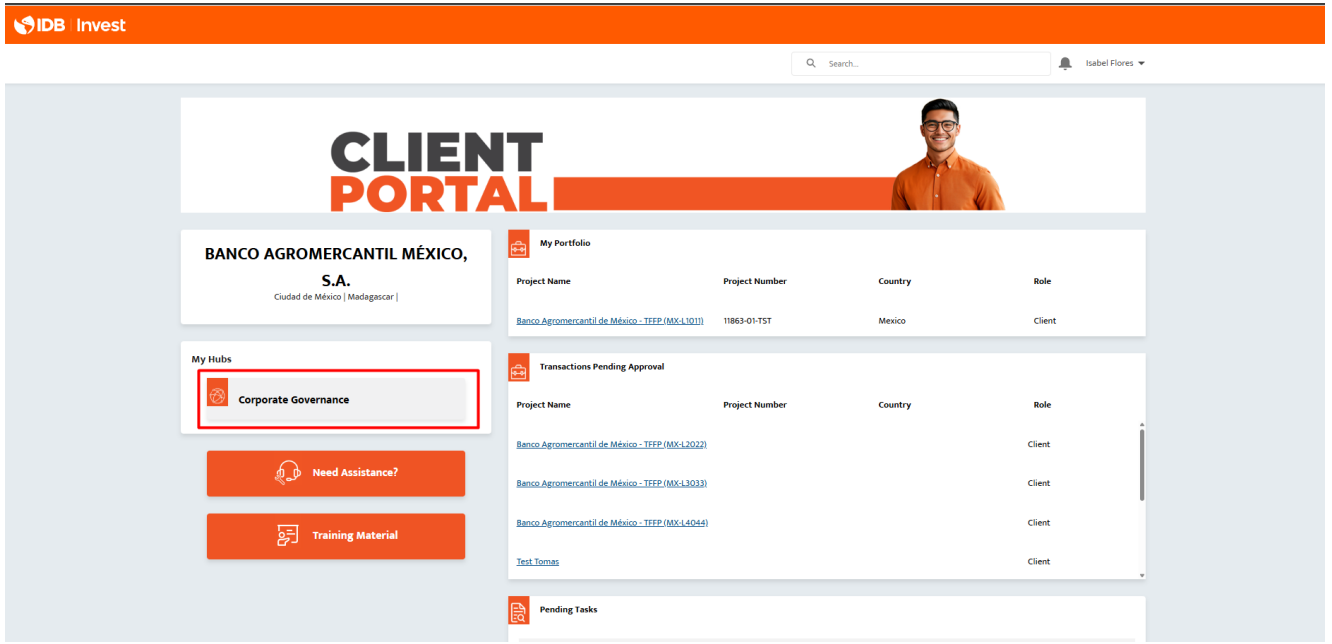
Find your questionnaire in the Corporate Governance section.

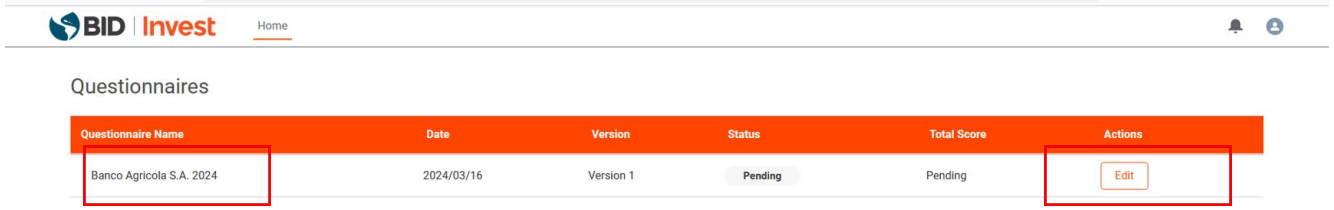
Review assigned questionnaires

The Home page lists questionnaires where you are a selected contact.

Use Edit to respond

Edit appears while the questionnaire has not been submitted.





03 | START

Choose your language

Select a language

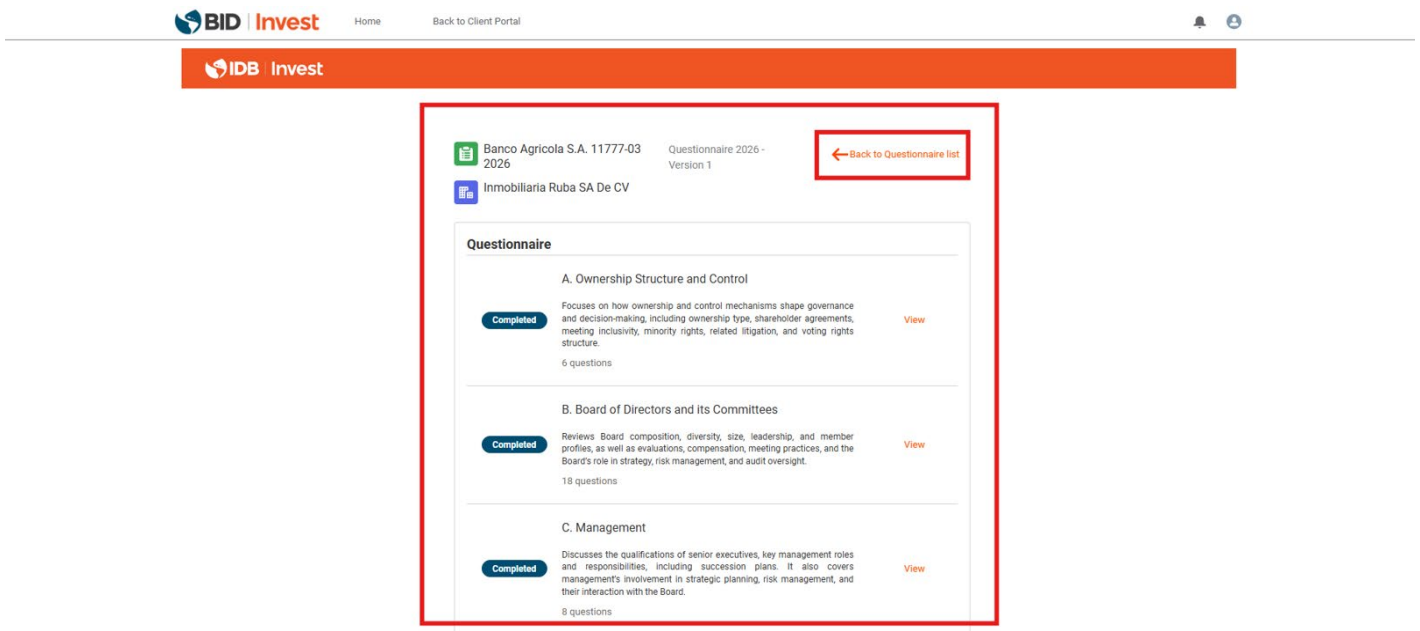
English, Spanish and Portuguese are available.

Review questionnaire details

Confirm name, year, description and version in the header.

Open the sections

Each section shows its description, question count and status.



04 | ANSWER

Complete each section

Start, Continue or Modify

Use the action shown for each section.

Answer all questions

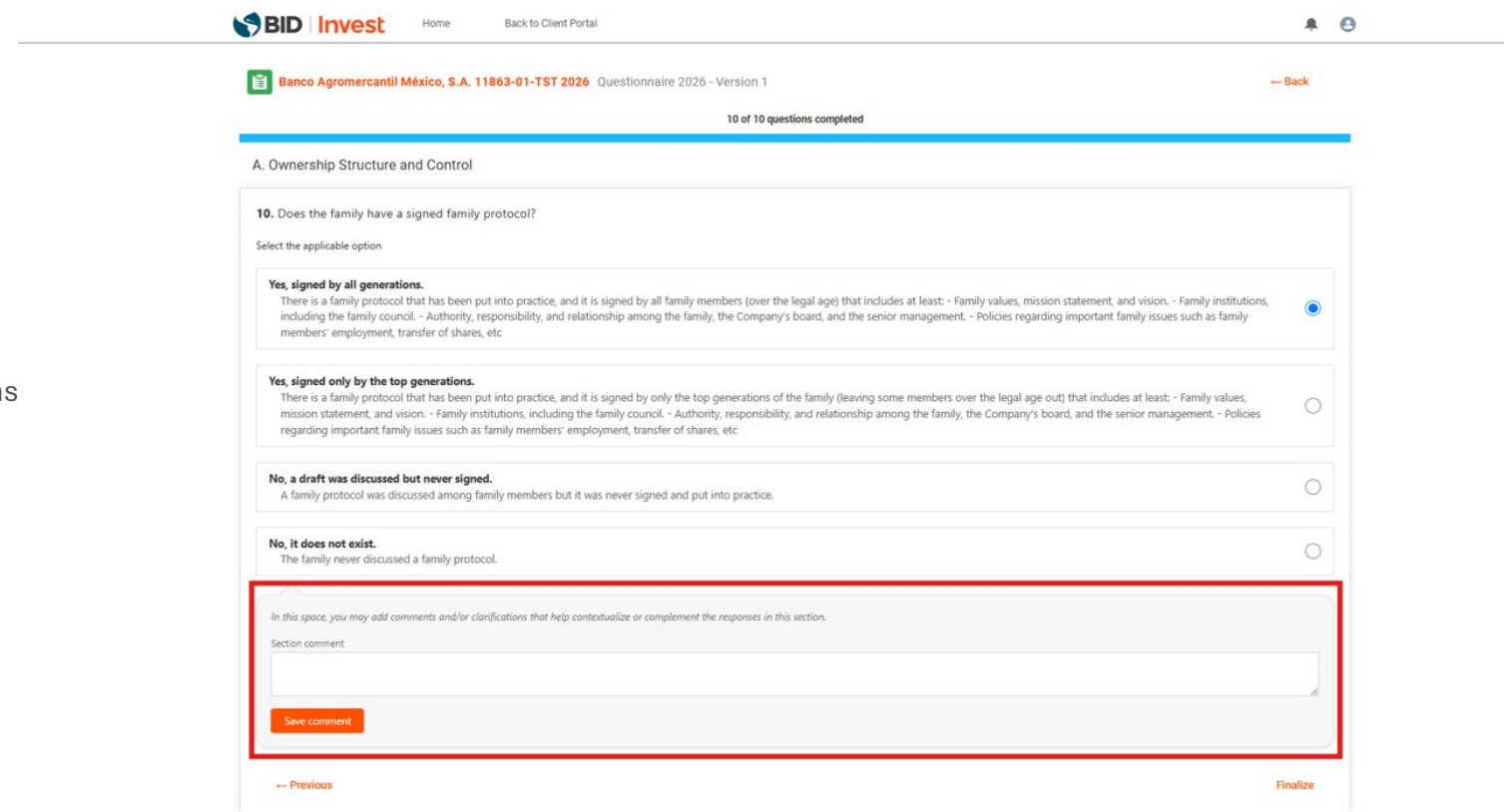
You can review the questions first. You must answer all questions before submitting.

Track your progress

The indicator updates as questions are completed.

Add context if needed

An optional general comment can be added at section level.



06 | COLLABORATE

Work together in real time

When multiple selected contacts are on the same question, an answer chosen by one user is visible to the others.



07 | FINISH

Submit the questionnaire

Complete every section

The submit button is available **only after all questions are answered**.

Select Submit Questionnaire

Any contact selected for the questionnaire can submit it.

Confirm successful submission

A confirmation pop-up is displayed.

Use View after submission

Submitted questionnaires switch to a read-only action.



08 | AFTER SUBMISSION

What happens next

Responses become read-only

Use View to navigate the submitted answers.

Result access starts inactive

IDB Invest internal users enable access to results.

Email notification follows

Questionnaire contacts are notified when result access is enabled.

Home page updates

Status changes after submission; the score appears **once cleared by IDB Invest.**

