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Introduction

The Collaboration Platform is a unique forum that allows investors to pool resources, share information and enhance their influence on ESG issues. It is also a hub for academics and investors to connect and engage with research. Posts include invitations to sign joint letters to companies and join investor-company engagements, proposals for research, calls to foster dialogue with policy makers and requests for support on upcoming shareholder resolutions.

The Platform can be accessed by signatories, academics and non-signatories that register for a user account. Each collaboration has customisable visibility settings and can be made available to all signatories, specific signatory categories, academics and/or non-signatories by the collaboration creator.

All signatories can create collaborations on the Platform and invite other users to join a collaboration. The PRI can also create collaborations on behalf of stakeholders and other non-signatories. **Only signatories and the PRI can create collaborations.** The PRI will also create online working groups, advisory committees, networks and consultations that Platform users can join.

By accessing the Platform users are agreeing to abide by the [Platform terms of use](#).

Please direct any queries to [collaborate@unpri.org](mailto:collaborate@unpri.org).
Logging in to the Platform

Log in at www.collaborate.unpri.org.

If you do not have a PRI password tick the top box, enter your password and select Continue.

If you do have a PRI password tick the bottom box, enter your email and password and select Continue.

If you have forgotten your password click here to reset it.

Remember to check your spam filter for your password reset email.
Logging in to the Platform

Registering a new account

For PRI signatories only

Academic users will be able to enter additional information (such as a Google Scholar link). Please note that if you enter this information but your PRI account is not an academic type account these fields will not be visible on your profile.

Click ‘Next’ to enter your newsletter preferences and interests and save your profile.
Home page / dashboard

Once you have logged in the first thing you will see is your home page.
Navigation side panel

The side panel will always be visible when you are on the Platform.

- Your homepage (for more information see page 7).
- Search for collaborations, companies or members (for more information see page 10).
- Collaborations you own or are a member of (for more information see page 16).
- Tasks that have been assigned to you (for more information see page 15).
- Companies you have favourited (for more information see page 17).

Create a collaboration
Privacy settings

Accessing and amending your privacy settings.

Access your privacy settings by clicking on your name in the top right-hand corner of the screen, then clicking ‘Privacy settings’.

Ticking this box will allow others to search for and view your profile via the ‘discover members’ tab.

Ticking this box will allow users to message you on the Platform. It is important to have this box ticked if you are a collaboration’s main contact (see page 35).

Use this box to choose which type of user can message you.

Messages are directed to your registered email address and are not stored on the Platform. Other users cannot see your email address when they message you.
Discover

Use the discover tab to search for collaborations, companies and members
Discover collaborations

Use the advanced search filters to refine results by type, ESG theme, sector, etc.
Discover companies

Add companies to your favourites (see page 17) by clicking on that company’s star.
Discover and message members

Users who have chosen to be displayed in discover members in their privacy settings (see page 9) will be displayed here. If they have chosen to allow other members to message them the envelope symbol will be visible.

Click on the envelope to send a message.

Click on the user’s name to view their profile.
Messaging members

Send message

To:
Bertha Harmon

Subject

Message

Tick this box to receive a copy of this message in bcc to your registered email.

Messages are not stored on the Platform and are directed to the user’s email.
My tasks

Any tasks that have been assigned to you will be listed here.

Tick the box to mark a task as complete.
My collaborations

Collaborations that you own or are a member of will be listed here.
My companies

Companies you have ‘favourited’ will appear here

Export company and collaboration details to excel

Add companies to your favourites by clicking on the star when you see the company in discover or on a collaboration’s company list.

Favourite companies are private, meaning other users won’t be able to see your favourite companies.
Join a collaboration

Most collaborations can only be joined by PRI signatories. If you are unable to join a collaboration you will see a padlock (see page 19).

You can join a collaboration wherever you see these symbols.

If the collaboration owner has set any sign up questions, or if the collaboration has terms of reference, you will be asked to answer or agree to these now.
Collaboration member status symbols

The below symbols indicate your membership status in a particular collaboration.

- Click to request to join the collaboration.

- You are a member of this collaboration.

- You have been invited to join this collaboration but have not yet accepted or declined the invitation.

- You have requested to join this collaboration but your request hasn’t yet been approved or declined.

- You are unable to join this collaboration due to its privacy settings (see page 33).
Collaboration home page view for users who have not joined the collaboration.

Once you have joined a collaboration the newsfeed and tabs will be available (see pages 21 to 27).
Collaboration tabs

- **Home**: collaboration details such as type and ESG theme are visible here, as well as summary and business case. Members will also be able to see the collaboration newsfeed. Important reference documents and terms of reference are also visible.

- **Files**: any other relevant documents are saved here. Documents can be worked on with other users (see page 22).

- **Calendar**: collaboration owners are encouraged to add any important events to the calendar.

- **Subspaces**: collaboration owners can create subspaces within their collaboration, e.g. for an advisory committee.

- **Tasks**: any tasks assigned to members within the group will be saved here.

- **Members**: the collaboration members are listed here.

- **Manage members**: only visible to collaboration owners. The owner can use this tab to invite and remove members, and see answers to sign up questions.

- **Companies**: any companies the collaboration is targeting will be listed here.

The manage members tab is only visible to collaboration owners.

Discussions do not have subspaces or companies.
Files tab

Upload documents and work on them with other members

Click on ‘edit’ to edit a document. The file will then be locked for editing.

To upload files click ‘Add files’, select the files you want, then click ‘Upload’ and ‘Save’.

PRI admin and the collaboration owner can unlock a file if necessary.
Calendar tab

Collaboration owners are encouraged to add milestones to collaborations to give a sense of the collaboration’s timeline. All members can add events.

Events created on the Platform will not sync with members’ personal calendars due to firewall issues.
Subspaces tab

Collaboration owners can choose to create subspaces within their collaborations, for example for an advisory committee to use.

Subspaces have similar functionality to collaborations. Multiple subspaces can be created within one collaboration.
Tasks tab

Collaboration members can assign tasks to other members or themselves

Task list

<table>
<thead>
<tr>
<th>Title</th>
<th>Assignee</th>
<th>Deadline from</th>
<th>Deadline to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write up notes from last call</td>
<td>Select an option</td>
<td>21 Oct</td>
<td></td>
</tr>
<tr>
<td>Research search engine optimization and advertising</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Write up effective advertising materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mark's tasks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective forms advertising internet website</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author correct the interpellations and the third text</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

New task ▼
Members tab

Collaboration members are listed here.
Companies tab

Any companies targeted by this collaboration will be listed here.

Click on the star to add to your companies

Click here to export company details
Create a collaboration

Only PRI signatories can create collaborations. If you are a stakeholder collaborating with PRI and wish to post a collaboration, please contact collaborate@unpri.org
Create a collaboration

Choose a collaboration type

Select the type of collaboration you wish to create and click ‘create new’
Create a collaboration

About your collaboration

A brief summary of your collaboration. Depending on the privacy settings (see page 34) this will be publicly visible.

How is this issue relevant to investors? Depending on the privacy settings (see page 34) this will be publicly visible.

Describe your collaboration in full. This information will only be visible to members of your collaboration.

What are this collaboration’s objectives? When the collaboration is complete these will follow the same visibility settings as the summary (see page 34), and can be edited whilst the collaboration is active. They are not visible to other users when the collaboration is active.
Create a collaboration

About your collaboration: attachments

Click add files, then upload

Upload any attachments you would like visible on the front page of your collaboration. These files will be visible to collaboration users who are not members of your collaboration.

Documents you only want to share with your collaboration members can be added in the ‘Files’ section once the collaboration has been created.

Add any documents you want to work on with your collaboration members to the Files section once your collaboration is created.

Terms of reference can be added later (see page)
Create a collaboration

Collaboration details

If your collaboration has no specific geography please select 'global'. You can also select more than one country.

Information on why the SDGs are relevant to institutional investors can be found here.

End date can be left blank.
Create a collaboration

Collaboration privacy settings

All registered users will be able to request to join, irrespective of type

Restrict who can request to join by type (see below)

Your collaboration will not feature in search results and you will have to invite all members.

Privacy

- Public - everyone can see and request to join
- Specific user types - only the type of user you select can see and request to join
- Invitation only - only those who have received an invitation can see and join

If 'Invite only' is selected users will only be able to find this collaboration if they are invited. It will not feature in search results.

User types

- Asset owner signatories
- Investment manager signatories
- Service provider signatories
- Academics
- Media organisations

Most collaborations will be available to signatories only. The PRI ultimately makes the decision of which collaborations are available to non-signatories.
Create a collaboration

Collaboration privacy settings: member list, company list and summary and business case visibility

- **Display companies**
  - Publicly
  - Only to platform users
  - Only to members of this collaboration
  - By default, company lists are visible to all Platform users. Tick this box to restrict viewing this list to members of your collaboration.

- **Display member list**
  - Publicly
  - Only to platform users
  - Only to members of this collaboration
  - By default, member lists are visible to all Platform users. Tick this box to restrict viewing this list to members of your collaboration.

- **Display business case and summary**
  - Publicly
  - Only to platform users
  - Only to members of this collaboration
  - By default, business case and summary are publicly visible. Use the boxes above to restrict viewing this information to logged-in Platform users or just members of this collaboration.

Anyone with the collaboration URL will be able to see this information if ‘publicly’ is selected.

If you have made your collaboration invitation only, these settings will be overridden – all will be visible to members of the collaboration only.
Create a collaboration

Collaboration details: main contact

Please ensure your main contact has opted in to receiving messages (see page 9).

Choose the collaboration’s main point of contact

Created by*

Katherine Pruski

Main contact*

Katherine Pruski

Back

Next
Create a collaboration

Sign up questions

If you would like users to answer questions when they ask to join your collaboration, enter them here.

**Question**

If you don’t need your members to answer any questions when they join leave this blank.
Create a collaboration

Terms of reference

By ticking this box users will be asked to agree to your terms of reference before requesting to join this collaboration. The terms of reference will also be attached to this collaboration’s home page.

Enable terms of reference

Terms of reference document name

Terms of reference

Choose file No file chosen

Upload requirements

By ticking this box and uploading a terms of reference document members will be required to confirm they agree to the terms of reference when joining a collaboration.
Create a collaboration

Submit for approval

Click on ‘Submit’ when you have finished setting up your collaboration.

If you want to come back to it and finish it later, click ‘Save as draft’

PRI will review your collaboration and you will receive an email notification when it has been approved. Discussions do not require approval but will be reviewed by PRI when created.

See pages 22 to 25 for information on files, calendar and tasks.
Creating subspaces

Use subspaces to create a private space for a subset of collaboration members.

Subspaces have similar functionality to collaborations and provide a private space for a subset of collaboration members, e.g. an advisory committee.

Multiple subspaces can be created within a collaboration, but a subspace cannot be created within a subspace.
Adding companies

Add companies your collaboration is targeting.

Click here to add companies to your collaboration.

Companies are not available in discussion type collaborations.

Depending on privacy settings (see page 34) your collaboration will be listed on the company’s page.
Manage members

Once your collaboration has been created click on 'invite members' from the ‘Manage members’ tab.
Manage members

How to invite members

Enter the name of the person you want to add to your collaboration here. If they are registered on the platform they will show in the list.

If you would like to make this person an owner of the group tick this box. They will have the same permissions as you to edit the collaboration.
Manage members

How to view sign up question responses or remove a member from your group

If you need to remove the member select ‘Remove from group’

On the ‘Manage members’ tab, click the down arrow on the member’s card and select ‘Sign up questions’. If you have set sign up questions the member’s answers will be visible.
Manage members

Export members

Click here to export a list of members to excel
Converting a discussion

Discussion owners are able to convert their discussion into a different type of collaboration, such as an investor statement or shareholder resolution. All of the content will be retained and new features (subspaces and companies) will be available.

Click on the edit button on the top right-hand corner of your collaboration and select ‘Convert to initiative’

Select ‘Convert my discussion’. You will then be asked to choose a new collaboration type.

Discussions can be used to gauge investor interest for a particular topic before launching a formal collaboration.
Ending a collaboration

Wrap up

Click on the edit button on the top right-hand corner of your collaboration and select ‘Wrap up’.
Ending a collaboration

Objectives and outcomes

Please ensure you have attached any final documents to your collaboration before wrapping up.

Objectives

Enter the outcomes of the objectives above.

Outcome

Please note that the visibility settings you chose for your collaboration summary will apply to your objectives and outcomes.

Cancel

Submit

Any objectives you previously entered will appear here. You are able to edit them on this screen.

The privacy settings you chose for your summary and business case (see page 34) will also apply to your objectives and outcomes.

Make sure you have added any final documents to the Files tab before wrapping up.
Contact

If you have any technical issues or suggestions please contact collaborate@unpri.org. For log in issues please contact support@unpri.org.