Contents

- Introduction – page 4
- Logging in to the Collaboration Platform – page 5
- Navigating the Collaboration Platform – page 7
- ‘My Collaboration Platform’ page
  - My collaborations – page 8
  - My tasks – page 9
  - My companies – page 10
- ‘All Collaborations’ page – page 11
- ‘Resolution Database’ page – page 13
- ‘Find’ page
  - Engagement focus organisations – page 14
  - Collaborating organisations – page 15
  - Individual user profiles – page 16
- User settings
  - Privacy settings – page 17
  - Preferences – page 18
  - Edit profile – page 19
- Joining a Collaboration – page 20
- Collaboration status options – page 22
- Individual Collaboration pages – page 23
  - Files tab – page 25
  - Calendar tab – page 26
  - Subspaces tab – page 27
  - Tasks tab – page 28
  - Members tab – page 29
  - Engagement focus tab – page 30
- Creating a Collaboration – page 31
  - Creating subspaces – page 40
  - Manage members tab – page 41
- Converting a discussion – page 43
- Ending a Collaboration – page 44
- Contact – page 46
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. Collaborations 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 owner.

PRI Signatories, PRI Staff and PRI’s Network Supporters can create and invite other users to join Collaborations on the Platform. The PRI can also create Collaborations on behalf of stakeholders and other non-signatories. 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 collaborations@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 email address and select Continue.

If you have a PRI password, tick the bottom box, enter your email address 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.
Navigating the Collaboration Platform

Upon log-in, the first page you will see is ‘My Collaboration Platform’. This is your home page.

You can access all User settings via the dropdown arrow next to your name in the top right corner of the page. From here, you can update your privacy settings, notification preferences and profile information.

The navigation side panel will always be visible when you are on the Collaboration Platform. Note that only PRI Signatories, PRI Staff and PRI’s Network Supporters will see the ‘Create a collaboration’ button here.
My Collaboration Platform: My collaborations

On the left-hand side of My Collaboration Platform, you will see the Collaborations that you own or are a member of.

Use filters for Collaboration Type, Collaboration Status, ESG theme and Geography to find Collaborations.

Click this to toggle between Collaborations you own and all Collaborations you are a member of.

Each Collaboration that you are a member of or own will display with its own tile here.

This banner will appear when there is new activity on a Collaboration.
My Collaboration Platform: My tasks

On the right-hand side of My Collaboration Platform, you will see a list of all tasks that have been assigned to you.

- Tick the box to mark a task as complete.
- Click to go to the Collaboration that the task is affiliated with.
- Click this to display tasks that have been marked as completed.
- Create a new task.
My Collaboration Platform: My companies

On the right-hand side of My Collaboration Platform, you will see organisations that you have added to your 'My Companies' list. Organisations added here are private, meaning other users won’t be able to see which organisations you have selected.

Click to see the organisation’s details, and any Collaborations where the organisation is an Engagement focus.

Remove an organisation from your 'My companies' list by clicking on the adjacent star.
All Collaborations

The All Collaborations page displays all the collaborative opportunities that have been posted to the Collaboration Platform.

Collaborations will be sorted by Most recently created by default. Use the dropdown arrow to change how results are sorted.

Each Collaboration has its own tile. Click on the Collaboration tile to visit its Collaboration page and find out more information.
All Collaborations

On the All Collaborations page, you can use the filtering, searching and sorting tools to refine your results.

- Export an Excel file of All Collaborations or filtered Collaborations.
- Use the filters to refine results by SDG, ESG theme, ESG sub-theme, asset class, geography and sector.
- Filter by PRI led and/or PRI supported Collaborations.

All Collaboration types will be displayed by default. Click on one or more Collaboration types to display only these.
Resolution Database

The Resolution Database is a table that displays ESG-related resolutions and votes. PRI signatories can publicly pre-declare their voting intentions for each resolution. For more detailed guidance on the Resolution Database, please see the separate Resolution Database User Guide.
Find: engagement focus organisations

Here, you can find entities being engaged or targeted through collaborative activity, including individual companies, policy makers, regulators and more.

Use the searching, sorting and filtering tools to refine your results.

Add organisations to your ‘My companies’ list by clicking on that organisation’s star.
Find: collaborating organisations

Organisations seeking to collaborate on responsible investment topics will appear here. This includes PRI signatories, investors, network suppliers and other organisations.

Use the searching, sorting and filtering tools to refine your results.
Find: individual user profiles

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

Use the searching, sorting and filtering tools to refine your results.

Click on the envelope to send a message. Please note, messages are not stored on the Platform and are directed to the user’s email.

Click on the user’s name to view their profile.
User settings: privacy settings

Use this page to access and amend 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'.

Privacy Settings

Ticking this box will allow others to search for and view your profile via the ‘Find individual user profiles’ page.

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).

Please note, 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.

Use this box to choose which types of user can message you/
User settings: preferences

Use this page to access and amend your notification preferences and choose whether to receive in-Platform and/or email notifications.

Access your notification preferences by clicking on your name in the top right-hand corner of the screen, then clicking ‘Preferences’.
User settings: edit profile

Use this page to update your Collaboration Platform profile, including your interests and newsletter subscriptions.

About You

First Name
Last Name
Organisation

Request access to Reporting Tool
Request access to Data Portal
Are you an academic? No

Newsletters
Region
ESG Theme
Industry Sector
Academic Interests

Edit your profile by clicking on your name in the top right-hand corner of the screen, then clicking ‘Edit profile’.
Joining a Collaboration
Each Collaboration has a member status symbol. The symbol indicates your membership status for that particular Collaboration.

You are not a member of the Collaboration – you can request to join the Collaboration by clicking on the symbol.

You are a member of this Collaboration.

You have been invited to join this Collaboration – you can respond to the invitation by clicking on the symbol.

You have requested to join this Collaboration but your request hasn’t yet been approved or declined by the Collaboration Owner.

You are unable to join this Collaboration due to its privacy settings.
Joining a Collaboration

Collaborations can be joined from the All Collaborations page or from each individual Collaboration page.

On the All Collaborations page, click this symbol.

![All Collaborations page with 'Request to join' button highlighted](image1)

On an individual Collaboration page, click ‘Request to join’.

![Individual Collaboration page with 'Request to join' button highlighted](image2)

After clicking one of the above, a pop-up window will appear. You may be asked to answer any sign-up questions that the Collaboration Owner has set or agree to the Collaboration’s terms of reference. Once complete, click ‘Send request’. 

![Send request button](image3)
Collaboration status options

The status of each Collaboration describes whether it is seeking to additional support from other collaborators.

- **Active: seeking support** • These Collaborations are actively seeking collaborators to support the Collaboration.

- **Active** • These Collaborations are still ongoing, but may not be seeking additional support.

- **Completed** • These Collaborations have been marked as Completed by the Collaboration Owner.

- **Draft** • Collaborations that you have started creating, but have not yet submitted for approval.

- **Awaiting approval** • Collaborations that you have created and are awaiting approval from PRI.

- **Rejected** • Collaborations that you created and were rejected by PRI when submitted for approval.

- **Deleted** • These Collaborations have been deleted and are only visible to yourself and PRI Admin.
Individual Collaboration pages

Each Collaboration page will display in one of two ways –

Users who are not members of a Collaboration will not be able to access all tabs, and will see the following layout:

Users who are members of a Collaboration will find they can access all tabs in the Collaboration, including a feed of member posts, and will see the following layout:
Individual Collaboration pages

Each Collaboration page has a number of tabs –

- **Home**: all key Collaboration details, including the summary and business case, are visible here. Important reference documents and terms of reference are also visible. Members will also be able to see the Collaboration feed of posts.

- **Files**: documents for member-only use can be saved here. Documents can be worked on with other members.

- **Calendar**: any important events can be added to the calendar.

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

- **Tasks**: tasks assigned to members of the Collaboration will be saved here.

- **Members**: all confirmed Collaboration Members are listed here.

- **Manage members**: this tab is only visible to Collaboration Owners, and can be used to invite and remove members, and see answers to sign up questions.

- **Engagement focus**: Collaboration Owners can add engagement focus organisations (for example, individual companies, policy makers, regulators etc.) to this tab.

Collaborations of the ‘Discussion’ type do not have tabs for Subspaces or Engagement focus.
Individual Collaboration pages: Files tab

Upload documents and work on them with other members

PRI Admin and Collaboration Owners can unlock a file if necessary.

To upload files, click ‘Click here to browse files’, select the files you want, then click ‘Upload’ and ‘Save’.

Click on ‘edit’ to edit a document. The file will then be locked for editing.
Individual Collaboration pages: 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.
Individual Collaboration pages: 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.
Individual Collaboration pages: Tasks tab

Collaboration members can assign tasks to other members or themselves

![Tasks tab interface]

- Write up notes from last call (Due: 21 Oct)
- Research search engine optimization and advertising (Due: 18 Oct)
- Write up effective advertising pointers (Due: 15 Oct)
- Mark's tasks
- Effective forms advertising Internet web site (Due: 18 Oct)
- Athusser competing: Interpellations and the third text (Due: 18 Oct)
**Individual Collaboration pages: Members tab**

Collaboration members are listed here.

<table>
<thead>
<tr>
<th>Owner(s)</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Michael Hogan</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Warren Webb</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Lottie Iettrada</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Marian Rodgers</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Bartha Harmon</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Josephline Robinson</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Jonathan Moreno</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Glen Wolfe</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Sath Chambers</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Nettie Underwood</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Harold Wilkins</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Johnny Gross</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>Maude Washington</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
<tr>
<td></td>
<td>William Pope</td>
</tr>
<tr>
<td></td>
<td>Organisation Name</td>
</tr>
</tbody>
</table>
Individual Collaboration pages: Engagement focus tab

Collaboration Owners can add engagement focus organisations (for example, individual companies, policy makers, regulators etc.) to this tab.

The Collaboration Owner will be able to add and remove organisations from the Engagement focus tab.
Creating a Collaboration

PRI Signatories and PRI’s Network Supporters can create Collaborations. If you are a stakeholder collaborating with PRI and wish to post a Collaboration, please contact collaborations@unpri.org.

Click on the blue button in the navigation side panel to create a Collaboration.
Creating a Collaboration

You will be asked to choose a Collaboration type. Select the type of Collaboration you wish to create and click ‘Create new’.

PRI Staff can also create the following additional Collaboration types:

- Advisory Committee
- Consultation
- Network
- Working Group
Creating a Collaboration

In Step 1, you can add key information about your Collaboration.

- **Collaboration image**
- **Collaboration name**
- **Summary** – a short, one-line overview of the Collaboration
- **Business case** – how the issue and the Collaboration are relevant to investors
- You can also select the level of privacy of the summary and business case fields
- **Description** – allows you to provide more detail on your Collaboration; this information will be only be visible to members of the Collaboration
- **Objectives** – add any objectives of the Collaboration; this information will be only be visible to members of the Collaboration while it is Active, but will be displayed alongside the Outcomes information when the Collaboration is complete
Creating a Collaboration

In Step 2, you can add further Collaboration details. All information shared in this step will be displayed across the Collaboration Platform.

- **Main contact** – the contact added here will be the person to which messages are directed when users click ‘Message collaboration contact’, so please ensure your main contact has opted in to receiving messages.
- Whether you are **actively seeking support** from collaborators, and until **what date**
- **ESG theme**
- **ESG subtheme**
- **Sector**
- **Sustainable Development Goal**
- **Geography**
- **Asset class**
- **Asset class subcategory**
- **Attachments** – files attached here will be visible across the Collaboration Platform, including to non-members (documents you only want to share with your Collaboration members can be added in the ‘Files’ tab once the Collaboration has been created).
Creating a Collaboration

If you are creating a Shareholder resolution Collaboration type, in Step 2, you can also add information on the resolution.

- **Link a resolution in the Resolution Database** – the Resolution Database allows PRI Signatories to declare their voting intentions on votes listed. If you’d like to link your Collaboration to a resolution in the Database, you can do so here.
Creating a Collaboration

In Step 3, you can select your Collaboration’s privacy settings.

- **Privacy**
  - **Public** – all registered users will be able to request to join, irrespective of user type
  - **Specific user types** – restrict who can request to join by user type (select in checkboxes below)
  - **Invitation only** – your Collaboration will not feature in search results, and you will have to invite all members

- Most Collaborations will be available to signatories only. The PRI ultimately makes the decision of which Collaborations are available to non-signatories.

- Anyone with the Collaboration URL will be able to see this information if ‘Publicly’ is selected.
Creating a Collaboration

In step 4, you have the option to add sign up questions that users will be asked to answer if they request to join your Collaboration. If you don’t need prospective members to answer any questions, this section can be left blank.
Creating a Collaboration

In step 5, you have the option to add a Terms of Reference document to your Collaboration. If you don’t need a Terms of Reference document for your Collaboration, this section can be left blank.

By ticking this box and uploading a Terms of Reference document, prospective members will be required to confirm they agree to the Terms of Reference when requesting to join your Collaboration.
Creating a Collaboration

At the end of step 5, you can save your Collaboration as a draft and revisit it at a later time, or submit it for approval by PRI. Once reviewed by PRI, you will receive an email notification when the Collaboration has been approved. ‘Discussion’ Collaborations do not require approval but will be reviewed by PRI when created.

In order to submit your Collaboration, you'll need to check this box confirming that you're happy to receive messages from Collaboration Platform users regarding this Collaboration.

If you want to come back to your Collaboration and finish adding details later, click ‘Save as draft’.

Click on ‘Submit’ when you have finished setting up your Collaboration.
Creating a Collaboration: Creating subspaces

Subspaces can be used to create a private space for a subset of Collaboration members, and have similar functionality to Collaborations.

- Multiple subspaces can be created within a Collaboration, but a subspace cannot be created within a subspace.
- Note that subspaces are not available in discussion type Collaborations.

Click here to create a subspace.
Creating a Collaboration: Manage members tab

Collaboration Owners can use the Manage members tab to add and remove members from the Collaboration.

Collaboration Owners can click on the ‘Invite members’ button to send invitations to specific Collaboration Platform users.

A list of Collaboration Members can be exported to Excel. Any sign-up questions answered by the members will be included.
Creating a Collaboration: Manage members tab

Using the Actions menu, Collaboration Owners can view sign up question responses, make a member a Collaboration Owner (or demote from Collaboration Owner to member) or remove a member from the Collaboration. You can also send a message to all or selected members.

Collaboration Owners can use the Action menu to send a mass message to selected members.

Clicking the dropdown arrow next to a member displays actions that a Collaboration Owner can take for that member.
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

When a Collaboration has finished, it should be marked as Completed on the Collaboration Platform.

Click on the edit button on the top right-hand corner of your Collaboration and select 'Mark as Completed'.

Make sure you have added any final documents to the Files tab before marking as Completed!
Ending a Collaboration

On ending the Collaboration, you have the opportunity to revisit the Collaboration's objectives and add any outcomes of the Collaboration.

Any objectives you previously entered will appear here. You can edit previously stated objectives on this screen if you wish.

Enter the outcomes of the Collaboration.

The privacy settings chosen for your summary and business case will also apply to your objectives and outcomes.
Contact

If you have any technical issues or suggestions please contact collaborations@unpri.org.