

# The PRI Collaboration Platform user guide

A hub for investors, NGOs and academics to collaborate.

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Please direct any queries to [collaborations@unpri.org](mailto:collaborations@unpri.org)



## Disclaimer

PRI Association is committed to compliance with all applicable laws and does not seek, require or endorse individual or collective decision-making or action that is not in compliance with those laws. The use of particular tools and tactics discussed, and the scope of participation in this platform, is at the discretion of individual participants and subject to all relevant laws, including competition and antitrust laws. PRI facilitates the exchange of public information, but participants must not share or exchange non-public, competitively sensitive information. Participants must avoid coordination of strategic behaviour that impacts competition. They must make independent decisions regarding next steps and how they will pursue them, and are encouraged to consult their own counsel as appropriate.

# Contents

- Introduction – [page 3](#)
- Registering for an account – [page 4](#)
- Logging into the Collaboration Platform – [page 5](#)
- Resetting a forgotten password – [page 6](#)
- 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](#)
  - Notification preferences – [page 18](#)
  - Edit profile – [page 19](#)
- Signing up to newsletters – [page 20](#)
- Joining a Collaboration – [page 21](#)
- Collaboration status options – [page 25](#)
- Individual Collaboration pages – [page 26](#)
  - Files tab – [page 28](#)
  - Calendar tab – [page 29](#)
  - Subspaces tab – [page 30](#)
  - Tasks tab – [page 31](#)
  - Members tab – [page 32](#)
- Creating a Collaboration – [page 33](#)
- Managing a collaboration
  - Creating subspaces – [page 41](#)
  - Manage members tab – [page 42](#)
  - Sharing the correct link – [page 44](#)
- Converting a discussion – [page 45](#)
- Ending a Collaboration – [page 46](#)
- Contact – [page 48](#)

# Introduction

**The Collaboration Platform is a unique forum that allows investors to:**

- ✓ pool resources with peers
- ✓ share information
- ✓ enhance their influence on ESG issues.

Collaborations include:

- invitations to sign joint letters to companies;
- joint investor-company engagements;
- proposals for research;
- calls to foster dialogue with policy makers; or
- requests for support on upcoming resolutions or votes.

**PRI Signatories and Network Supporters can create collaborations and invite other users to join Collaborations.** Non-signatories can view and request to join certain collaborations. The PRI can also create collaborations on behalf of stakeholders.

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

# Registering for an account on the Platform

[Registering for a new account](#)



## Register

New user registration

\* required fields

### About You

First Name\*

Last Name\*

Email (this will become your username)\*

Confirm email\*

Password\* Minimum of 8 characters   Show password

Password\*

Confirm password\*

Organisation\*

Request access to Reporting Tool

Request access to Data Portal

Are you an academic?\*

NEXT

If your organisation name does not appear as you start typing, please enter your organisation name and it will be created in our system.

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](#) | [Contact Us](#)

Powered by ADvance

# Logging into the Platform

Log in at [www.collaborate.unpri.org](http://www.collaborate.unpri.org).



## Sign in

Sign in or register to access PRI websites

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

Email address\*

I'm not signed up, I don't have a password  
 I have a password

Enter your password\*

[Forgotten your password?](#)

CONTINUE

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

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

Remember to check your spam filter for your password reset email.

[Home](#) | [Contact Us](#)

Powered by [ADvance](#)

# Resetting a forgotten password

Use [this link](#) to recover your missing password



## Forgotten password

To reset a password, please submit your email address

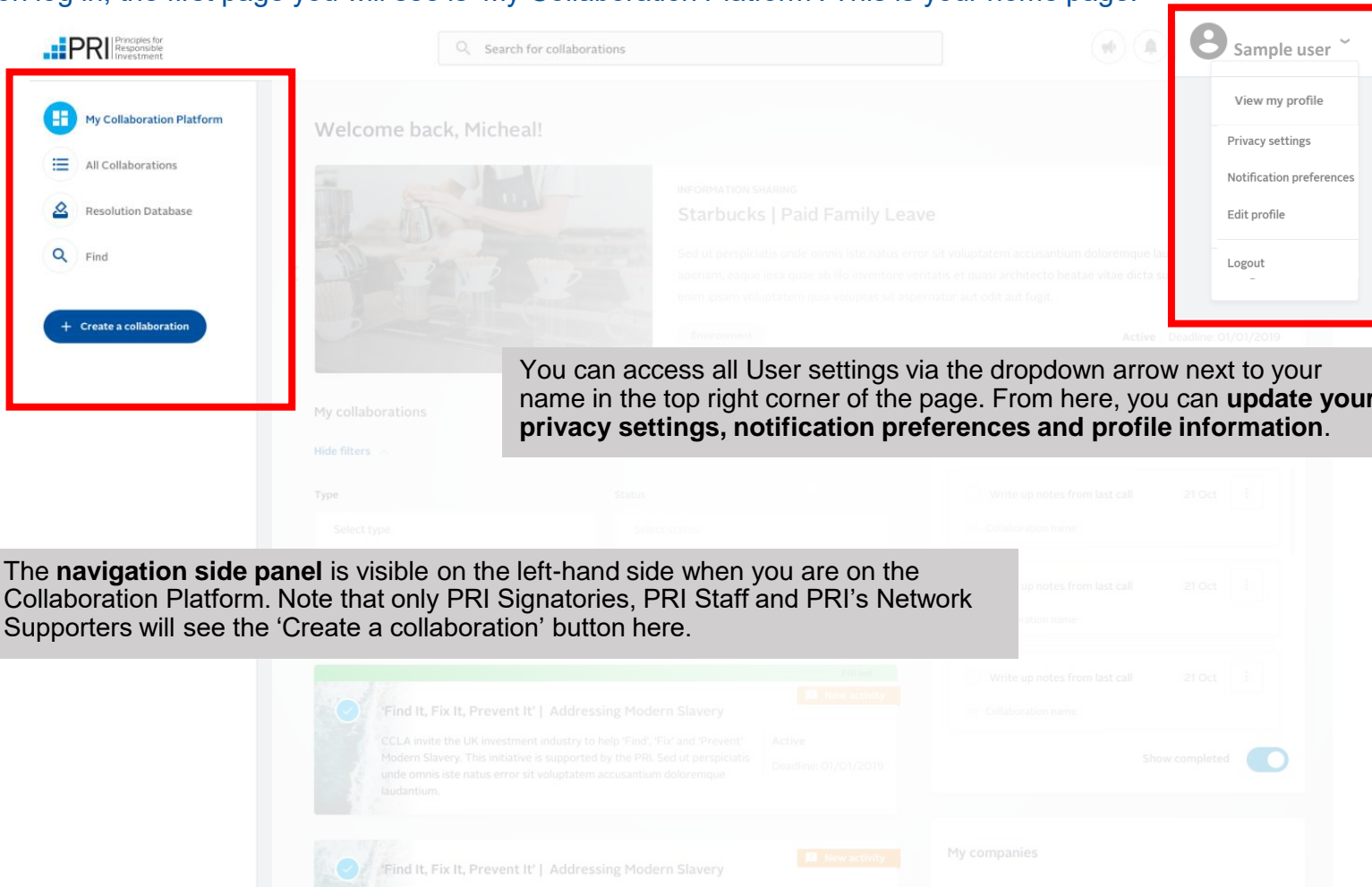
Your email address \*

SUBMIT

If you are having problems logging in please contact [support@unpri.org](mailto:support@unpri.org).

# 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** is visible on the left-hand side 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.

The screenshot displays the 'My collaborations' section of a platform. At the top, there is a toggle switch labeled 'Show only collaborations that I own' which is currently turned on. Below this, there are filter sections for 'Type', 'Status', 'ESG theme', and 'Geography', each with a 'Select' dropdown menu. A 'Hide filters' link is also present. The main content area shows a list of collaborations. Each collaboration tile includes a checkmark icon, a title, a description, a status (Active or Complete), a deadline, and a 'New activity' button. The tiles are categorized by 'PRI led' and 'PRI supported'. To the right, there is a 'My tasks' sidebar with a 'New Task' button and a list of tasks. Below that is a 'My companies' section showing logos and collaboration counts for AT&T, Dell, and Emerson Electric.

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

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

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.

The screenshot displays the 'My collaborations' and 'My tasks' sections of the platform. The 'My collaborations' section on the left shows a list of tasks, with one task highlighted: 'Write up notes from last call' due on '21 Oct'. A callout box points to the radio button next to the task name, stating: 'Tick the box to mark a task as complete.' Another callout points to the three-dot menu icon, stating: 'Click to go to the Collaboration that the task is affiliated with.' A third callout points to the 'Edit' and 'Delete' options in the menu, stating: 'Click this to display tasks that have been marked as completed.' The 'My tasks' section on the right shows a list of tasks, with a 'New Task' button at the top right. A callout box points to this button, stating: 'Create a new task.' Below the 'My tasks' section is the 'My companies' section, which lists companies like AT&T, Dell, and Emerson Electric with their respective collaboration counts.

Tick the box to mark a task as complete.

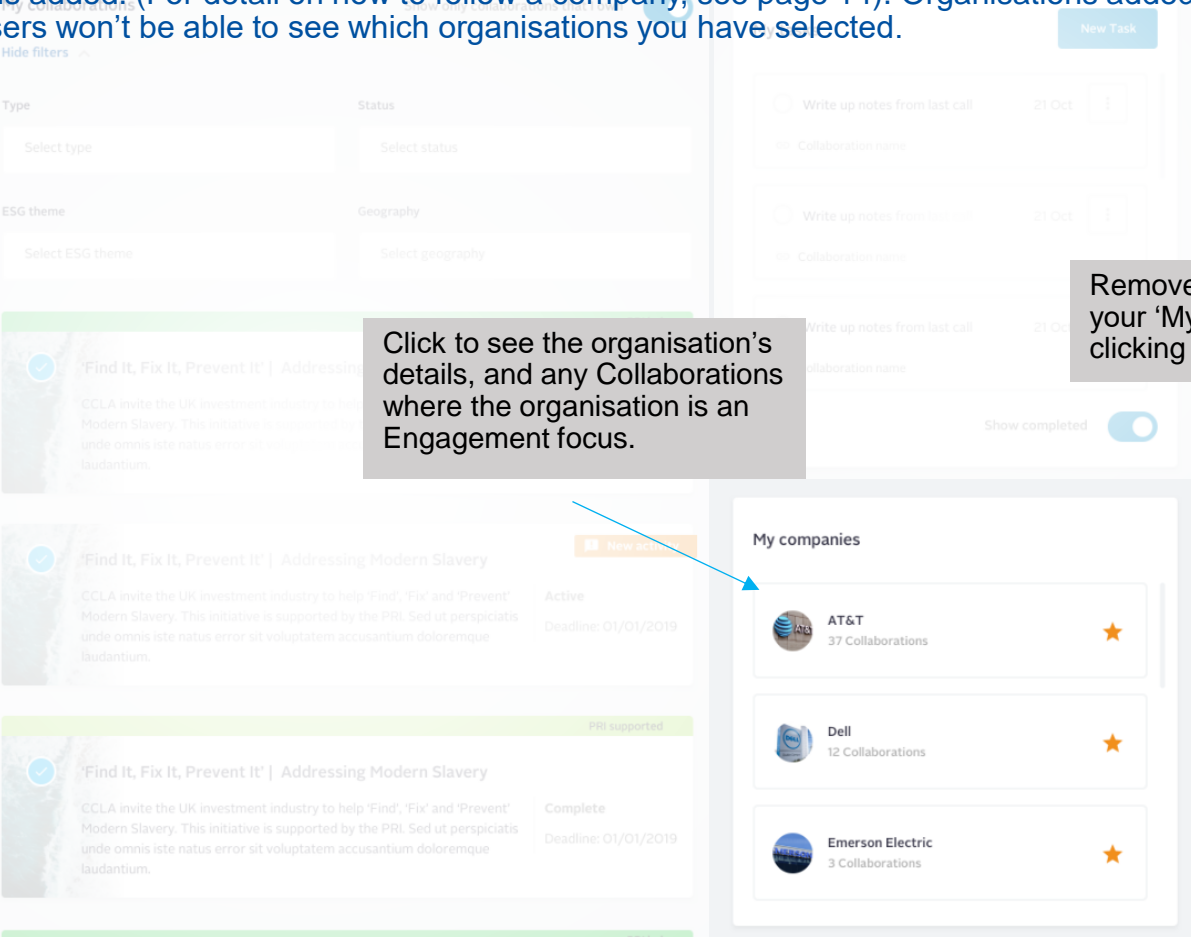
Click to go to the Collaboration that the task is affiliated with.

Create a new task.

Click this to display tasks that have been marked as completed.

# 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. Doing so will allow you to receive notifications when a collaboration, resolution or vote relevant to this organisation is added. (For detail on how to follow a company, see page 14). Organisations added 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

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

The screenshot shows the 'All Collaborations' interface. On the left is a navigation sidebar with 'My Collaboration Platform', 'All Collaborations', 'Resolution Database', 'Find', and a '+ Create a collaboration' button. The main area displays 'All Collaborations' with 873 results, sorted by 'Most recently created'. A search bar and 'Reset'/'Search' buttons are at the top right. Below are filter categories: 'Advisory committee', 'Consultation', 'Discussion', 'Engagement', 'Information sharing', 'Investor statement or letter', 'Network', 'Shareholder resolution', and 'Working group'. Filter fields include 'SDG', 'ESG theme', 'ESG sub-theme', 'Asset class', 'Geography', and 'Sector'. A 'Status' filter shows 'Active' with a close button. At the bottom right, there are checkboxes for 'PRI led collaborations' and 'PRI supported collaborations'. A list of collaboration cards is visible below, with one card highlighted in green and labeled 'PRI led'. Annotations include a red circle around the 'Export' button, a blue arrow pointing to the 'Search' button, and three grey text boxes explaining the filters and export options.

**Export** an excel file of All Collaborations or filtered Collaborations.

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

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 Collaborations

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

- My Collaboration Platform
- All Collaborations
- Resolution Database
- Find
- Create a collaboration

## All Collaborations

Export

873 results

Sort by: Most recently created

Search collaborations

Reset

Search

- All
- Engagements
- Resolutions
- Statements or letters
- Consultations
- Discussions
- Information sharing
- Working groups
- Advisory committees
- Networks

Hide filters

Sort

Filter by

Asset class

Filter by status

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.

PR led

Engagement

### 'Find It, Fix It, Prevent It' | Addressing Modern Slavery

CCLA invite the UK investment industry to help 'Find', 'Fix' and 'Prevent' Modern Slavery. This initiative is supported by the PRI. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium.

Environment Social Governance Open

Deadline: 01/01/2019

PR supported

Engagement

### 'Find It, Fix It, Prevent It' | Addressing Modern Slavery

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Environment Social Governance Open

Deadline: 01/01/2019

PR supported

Engagement

### 'Find It, Fix It, Prevent It' | Addressing Modern Slavery

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Environment Social Governance Open

Deadline: 01/01/2019

# Resolution Database

The Resolution Database 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](#).

PR I Principles for Responsible Investment
PR I Collaboration Platform Data Portal





My Collaboration Platform

All Collaborations

**Resolution Database**

Find

+ Create a collaboration





## Resolution Database

This table displays ESG-related shareholder resolutions and can be used to find upcoming votes. Resolutions filed or co-filed by a PRI signatory are marked by the blue symbol. PRI signatories can pre-declare their voting intentions. This is a voluntary opportunity for investors to publicly declare how they intend to vote on shareholder resolutions.

Update resolutions in bulk

Upload resolutions in bulk

 Export

Pre-declare your voting intentions

+ Add resolution to the database

184 resolutions Hide filters ^

Reset

Search

Resolution ask

Select resolution ask

ESG theme

Select ESG theme

ESG sub-theme

Select ESG sub-theme

Status

Filed
✕

Company


Search company



Company HQ


Select Company HQ

Company sector

Select company sector

Show only resolutions filed or co-filed by PRI signatories 

Resolution name <span style="font-size: 0.7em;">↕</span>	AGM date <span style="font-size: 0.7em;">▼</span>	Company <span style="font-size: 0.7em;">↕</span>	Lead filer	Status <span style="font-size: 0.7em;">↕</span>	Vote declarations <span style="font-size: 0.7em;">↕</span>
<span style="font-size: 0.7em;">▼</span> <a href="#">Greater Disclosure of Material Corporate Diversity, Equity and Inclusion Data at Danaher Corp.</a> 	05/10/2022	DANAHER CORPORATION	As You Sow	Filed	<input type="checkbox"/>
<span style="font-size: 0.7em;">▼</span> <a href="#">Shareholder Ratification of Termination Pay at Electronic Arts Inc.</a> 	04/10/2022	Electronic Arts Inc.	Corporate Governance Advisory Services	Filed	<input type="checkbox"/>



14

# Find: engagement focus organisations

Here, you can find and follow entities being engaged or targeted through collaborative activity, including individual companies, policy makers, regulators and more. Following an organisation will allow you to receive tailored notifications when a collaboration, resolution or vote relevant to this organisation is added. Any company that is not listed can be added by PRI; email [collaborations@unpri.org](mailto:collaborations@unpri.org) to do so.

The screenshot shows a web interface for finding engagement focus organisations. On the left is a sidebar with navigation options: 'My Collaboration Platform', 'All Collaborations', 'Resolution Database', 'Find', 'Engagement focus organisations', 'Collaborating organisations', and 'Individual user profiles'. A 'Create a collaboration' button is at the bottom of the sidebar. The main area is titled 'Find' and has three tabs: 'Engagement focus organisations' (selected), 'Collaborating organisations', and 'Individual user profiles'. Below the tabs, there is a search bar with the text 'Search engagement focus organisations' and a 'Search' button. A description states: 'Engagement focus organisations are the entities being engaged or targeted through a collaborative activity and include individual companies, policy makers, regulators and more.' Below this, it shows '620 results' and a 'Show filters' dropdown. A 'Sort by: Most recent' dropdown is also present. The results are displayed in a grid of cards, each featuring a company logo, name, and number of collaborations. Some cards have a yellow star icon, indicating they are followed. The cards include: Sealed AIR (4 collaborations, followed), Dell (12 collaborations, followed), Emerson Electric (3 collaborations, followed), AT&T (37 collaborations, not followed), UPS (8 collaborations, not followed), IBM (8 collaborations, not followed), Oracle (17 collaborations, followed), PepsiCola (13 collaborations, not followed), Yum Group (12 collaborations, not followed), Microsoft (37 collaborations, followed), Yahoo (5 collaborations, not followed), General Electric (32 collaborations, not followed), Proctor & Gamble (15 collaborations, not followed), AT&T (37 collaborations, followed), Dell (12 collaborations, followed), Sealed AIR (4 collaborations, followed), Dell (12 collaborations, not followed), Emerson Electric (3 collaborations, not followed), AT&T (37 collaborations, not followed), UPS (8 collaborations, followed), and IBM (8 collaborations, followed).

Add organisations to your 'My companies' list by clicking on that organisation's star.

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

# Find: collaborating organisations

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

The screenshot shows a web interface for finding collaborating organisations. On the left is a navigation sidebar with options: 'My Collaboration Platform', 'All Collaborations', 'Resolution Database', 'Find', 'Engagement focus organisations', 'Collaborating organisations', and 'Individual user profiles'. A blue button '+ Create a collaboration' is at the bottom of the sidebar. The main content area is titled 'Find' and has three tabs: 'Engagement focus organisations', 'Collaborating organisations' (which is selected), and 'Individual user profiles'. Below the tabs, there is a search bar with the placeholder text 'Search collaborating organisations' and a 'Search' button. A 'Sort by: Most recent' dropdown menu is also present. The results section shows '620 results' and a 'Show filters' dropdown. The results are displayed in a grid of 6 columns and 7 rows. Each result card features a blue icon with a white building, the organisation's name, and its role. The organisations listed are: Pensioenfonds Metaal en Techniek (Investment Manager), GTO Partners LLP (Provisional signatory), Groupama Asset Management, IDIA, Velliv (Investment Manager), BVP Investments Lid, Solvage (Service Provider), Central Bank of Ireland, and Danish Financial Supervisory Authority. The grid repeats the first three organisations in the first row and the last three in the second row.

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 17) will be displayed here. If they have chosen to allow other members to message them the envelope symbol will be visible.

The screenshot shows a web interface for finding user profiles. On the left is a navigation sidebar with options: 'My Collaboration Platform', 'All Collaborations', 'Resolution Database', 'Find', 'Engagement focus organisations', 'Collaborating organisations', and 'Individual user profiles'. A 'Create a collaboration' button is at the bottom of the sidebar. The main area is titled 'Find' and has three tabs: 'Engagement focus organisations', 'Collaborating organisations', and 'Individual user profiles' (which is selected). Below the tabs, there is a search bar with the text 'Search individual user profiles' and a 'Search' button. A 'Sort by: Most recent' dropdown is also present. The results show 620 results with a 'Show filters' dropdown. The results are displayed in a grid of 24 cards, each representing a user profile. Each card includes a profile picture, the user's name, and the text 'Organisation Name'. An envelope icon is visible in the bottom right corner of each card, indicating that the user can be messaged. The envelope icon for the user 'Harold Wilkins' is circled in red.

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.



View my profile

Admin settings

Privacy settings

Notification preferences

Edit profile

Logout

# 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

Display me in discover members

By ticking this box your name will be listed on the 'Discover Members' tab and will feature in search results

Allow people to message me

Who can message me

- PRI Staff X
- Academics X
- Asset owner signatories X
- Investment manager signatories X
- Service provider signatories X

Save

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 33). 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/



View my profile

Admin settings

Privacy settings

**Notification preferences**

Edit profile

Logout

## User settings: notification preferences

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

**Notification Preferences**

**Collaborations, subspaces and tasks**

Select frequency to receive email notifications Daily digest > Tailor your notifications

**New collaborations, resolutions and votes**

Select frequency to receive email notifications Daily digest > Tailor your notifications

**Collaborations I own and / or created**

Select frequency to receive email notifications Immediately > Tailor your notifications

Access your notification preferences by clicking on your name in the top right-hand corner of the screen, then clicking 'Notification 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?\*  ▼

## Newsletters

## Region

## ESG Theme

## Industry Sector

## Academic Interests



User

[View my profile](#)

[Admin settings](#)

[Privacy settings](#)

[Notification preferences](#)

[Edit profile](#)

[Logout](#)

Edit your profile by clicking on your name in the top right-hand corner of the screen, then clicking 'Edit profile'.

# Signing up to newsletters (Resolution/Collaboration Alert)

Signatories can sign up to receive the Resolution Alert and/or the Collaboration Alert using the [Edit profile](#) tab. Signatories can also set their newsletter preferences when first registering for an account on the platform.

**Newsletters**

**Newsletter Preferences**

- Policy Newsletter**  
*A monthly update from the PRI's policy team, covering a range of global policy and regulatory developments, events and recommendations for investors and policymakers.*
- PRI Academy**  
*Occasional updates from the PRI Academy, which provides CFA-accredited online training on how ESG issues impact company performance, shareholder value and investment decisions. The training is completely web-based, meaning that you can start and finish when and where you please: no travel, no pressure, lower greenhouse gas emissions.*
- Francophone Programme**  
*A quarterly update for French-speaking signatories – includes latest information on French-speaking PRI events, translated PRI publications, webinars, and other relevant news. The aim of the Francophone Programme is to further promote responsible investment within French-speaking countries, particularly amongst asset owners.*
- All-Signatory Newsletter**  
*A monthly update providing all the latest news from across the organisation.*  
*[Quarterly for non-signatories]*
- Collaboration Alert**  
*A weekly update on the latest engagements and more from the Collaboration Platform.*  
*[Signatory-only]*
- Resolution Alert**  
*This alert will be sent weekly during proxy season notifying subscribers of upcoming AGMs and notifying subscribers of upcoming AGMs and ESG related resolutions and votes.*  
*[Signatory-only]*

# 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.



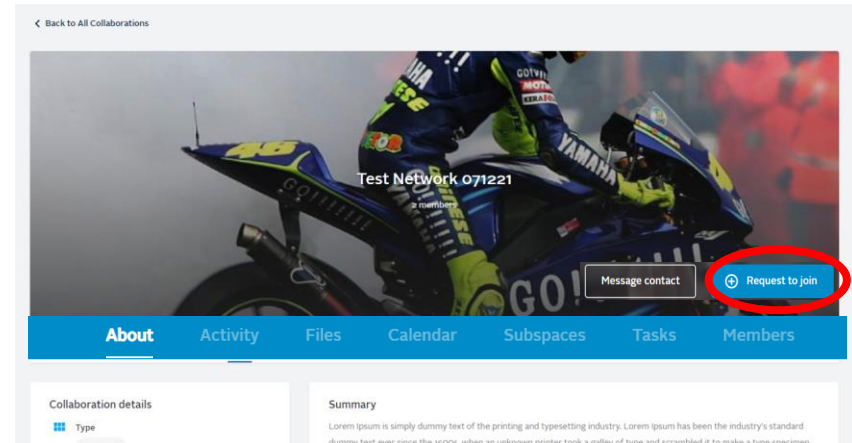
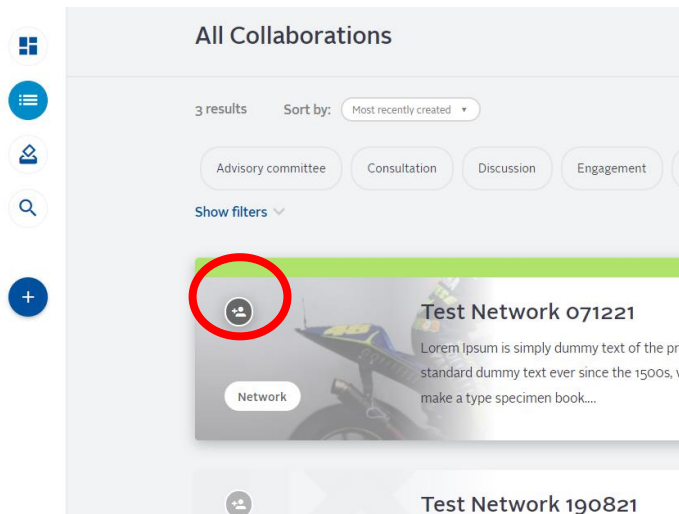
# Joining a Collaboration (1) – request to join on the platform

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

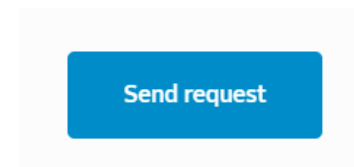
**Option 1)** On the All Collaborations page, click this symbol.



**Option 2)** On an individual Collaboration page, click 'Request to join'.



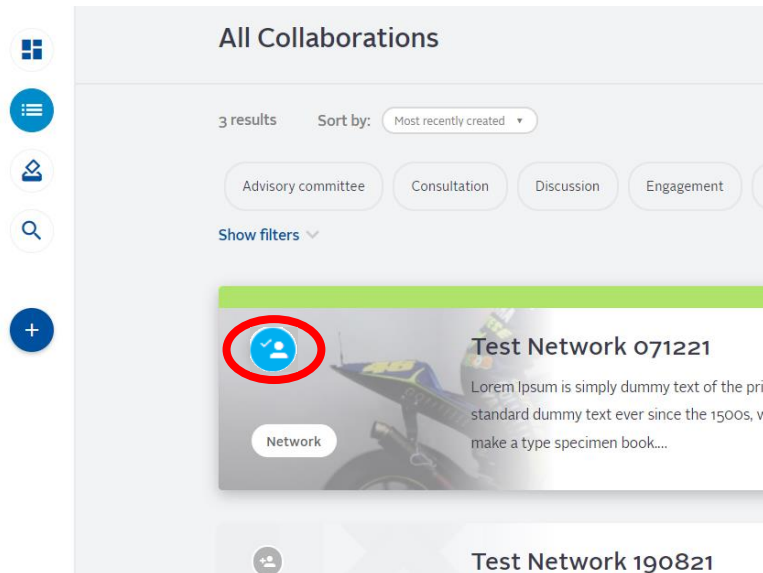
- Choosing either option 1 or option 2 will make a pop-up window appear.
- You may be asked to answer sign-up questions that the Collaboration Owner has set or agree to the Collaboration's terms of reference.
- Once complete, click 'Send request'.



## Joining a Collaboration (2) – accept invite on the platform

You can also accept an invitation to join a collaboration on the platform.

- This symbol means that you have been invited by the Collaboration Owner to join a collaboration.
- Respond to the invitation by clicking on the symbol.

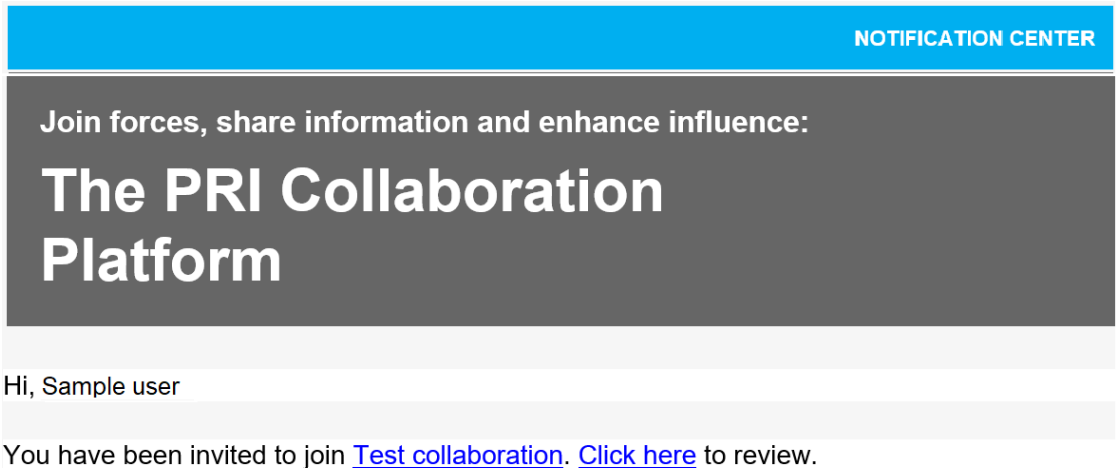




## Joining a Collaboration (3) - accept invite via email

Another way to join a collaboration is to accept an email invitation sent by the collaboration owner.

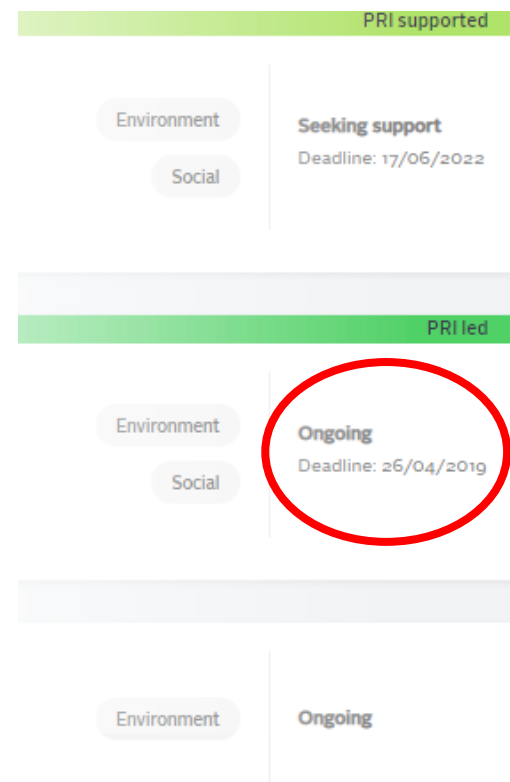
- You will receive an email titled [Notification from PRI], informing you that you have been invited to join a collaboration.
- If you do not receive the email, check with your IT administrator to ensure no firewall is blocking the email
- If this issue persists, request the collaboration owner to manually add you as a member to the collaboration or contact [collaborations@unpri.org](mailto:collaborations@unpri.org).



# Collaboration status options

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

- **Seeking support** • These Collaborations are actively seeking collaborators to support the Collaboration.
- **Ongoing** • These Collaborations are still active, 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.

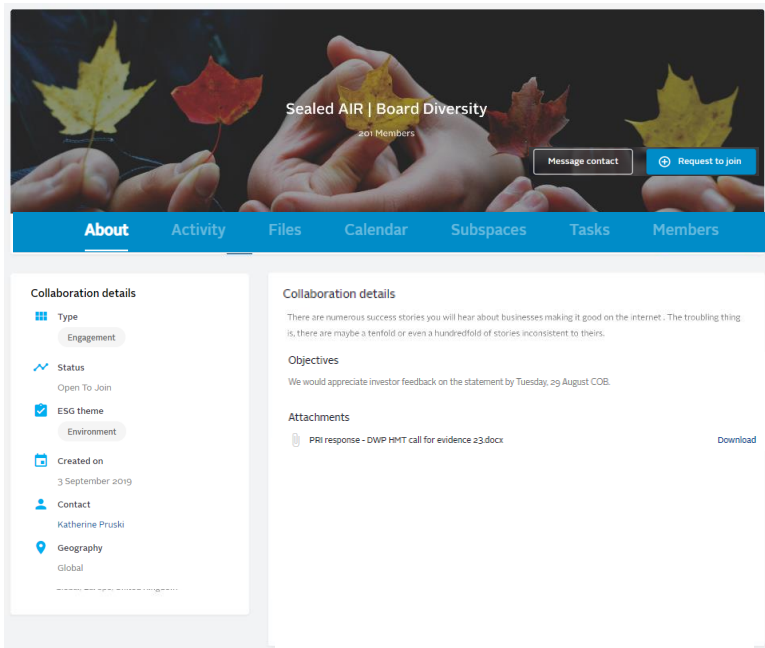


On the 'All Collaborations' page, each Collaboration's status can be seen on the right-hand side.

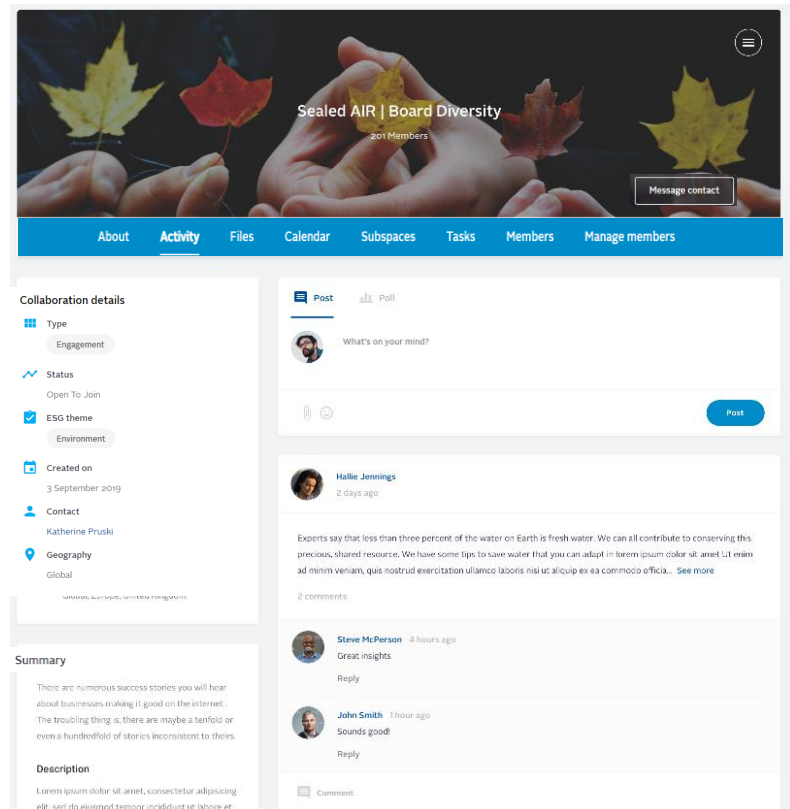
# Individual Collaboration pages

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:



Collaborations of the 'Discussion' type do not have a Subspaces tab.

## Individual Collaboration pages

Each Collaboration page can have the following tabs –



- **About:** all key Collaboration details, including any objectives listed, are visible here. Important reference documents and terms of reference are also visible, as are any engagement focus organisations selected, such as target companies.
- **Activity:** members will also be able to see the Collaboration feed of posts, events created, files uploaded etc. Members can also post information from this page or set up a poll.
- **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, see answers to sign up questions and manage member types e.g. in a resolution or vote type collaboration members can be listed as co-filer, lead filer or supporting investor.

# Individual Collaboration pages: Files tab

Upload documents and work on them with other members

The screenshot displays the PRi Files tab interface. At the top, a navigation bar includes 'About', 'Activity', 'Files', 'Calendar', 'Subspaces', 'Tasks', and 'Members'. The 'Files' section shows a 'File list' with a search bar and a 'Search' button. A file named 'Problem & high level requirements session.docx' is listed with a lock icon. A context menu is open over the file, showing options: 'Edit', 'Upload new version', 'View revisions', and 'Delete'. A blue arrow points from a text box to the 'Edit' option. To the right, the 'Upload file' section features a dashed box for dropping files, an 'Add files' button, and an 'Upload' button. Below the upload area, there are fields for 'Filename' and 'No files yet', and a 'Save' button. A '3' in a circle is positioned near the 'Save' button.

File list

Search files

Search

Problem & high level requirements session.docx

Download

Edit

Upload new version

View revisions

Delete

Upload file

Drop files here to upload them

1 or Add files

2 Upload

Filename

No files yet

3 Save

Upload requirements

- Maximum 5 files at a time.
- 15 MB each.
- Allowed types: txt pdf rtf doc docx xls xlsx ppt pptx jpeg jpg png gif png tiff .

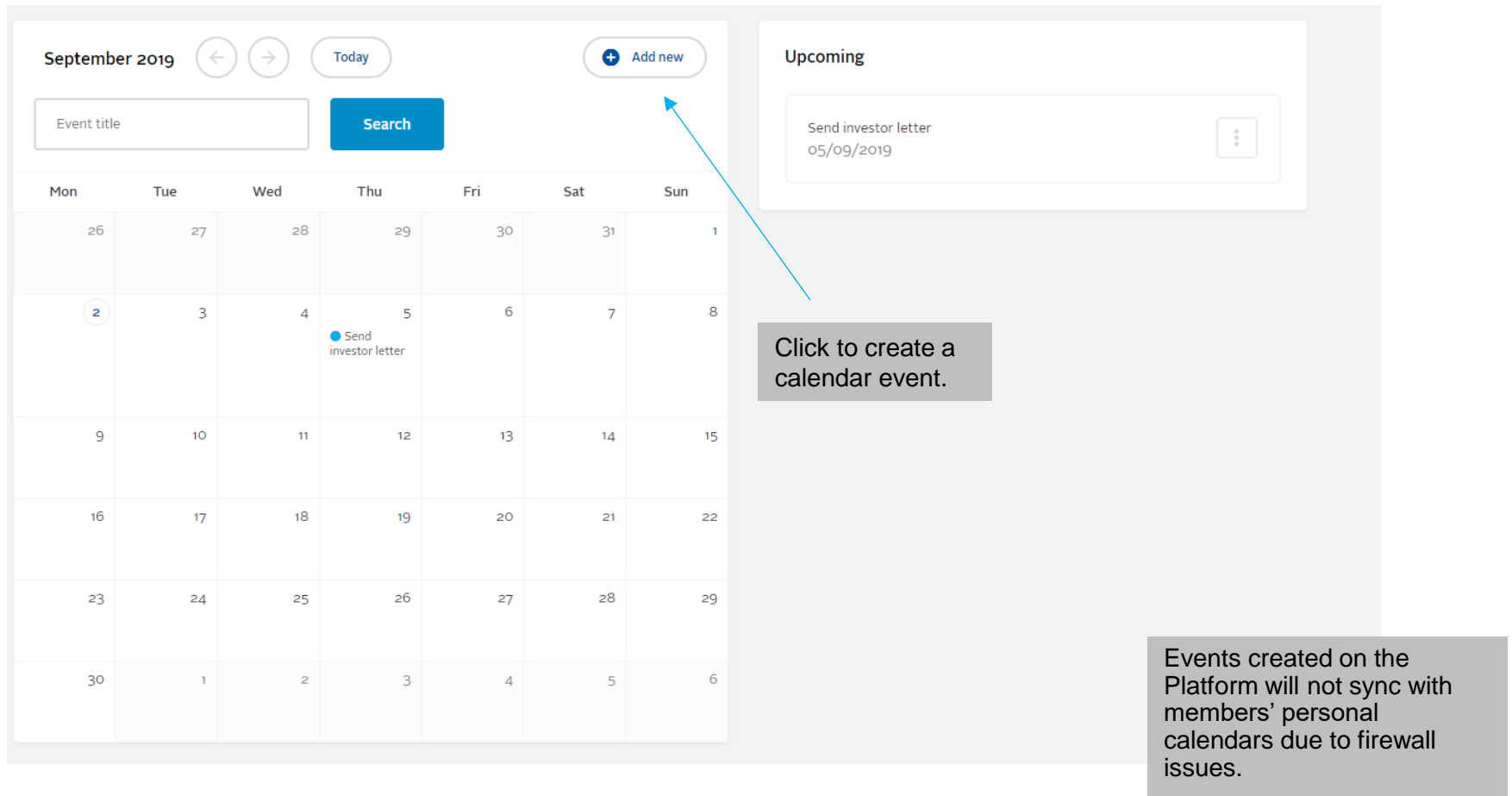
Click on 'Edit' to edit a document. The file will then be locked for editing.

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

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

## 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.



September 2019

Event title  Search

+ Add new

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5 ● Send investor letter	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Upcoming

Send investor letter  
05/09/2019

Click to create a calendar event.

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.

The screenshot displays the 'Example Collaboration' interface. At the top, it shows '1 member' and 'A sample collaboration.' Below this, there are filters for 'Type' (Resolutions or vote), 'Status' (Seeking support), 'Deadline' (07 July 2022), and 'Contact' (CPTest AssetOwner). A 'Message contact' button is also present. The navigation bar at the bottom of the collaboration page includes tabs for 'About', 'Activity', 'Files', 'Calendar', 'Subspaces', 'Tasks', 'Members', and 'Manage members'. The 'Subspaces' section is active, showing a '+ New subspace' button and a card for 'Example Subspace' with the description 'A test subspace'.

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

Task list New task ▾






0 results [Hide filters](#) ^

Title

Assignee

Deadline from  to

Tasks  Search

- Write up notes from last call 21 Oct  ⋮
- Research search engine optimization and advertising 18 Oct  ⋮
- Write up effective advertising pointers 15 Oct  ⋮
- Mark's tasks
- Effective forms advertising internet web site 18 Oct  ⋮
- Althusser competing interpellations and the third text 18 Oct  ⋮



# Individual Collaboration pages: Members tab

Collaboration members are listed here.

The screenshot displays a navigation bar with tabs: About, Activity, Files, Calendar, Subspaces, Tasks, **Members** (highlighted with a red circle), and Manage members. Below the navigation bar, the page is divided into two sections: Owner(s) and Members.

**Owner(s)**

- Michael Hogan (Organisation Name)
- Warren Webb (Organisation Name)

**Members**

- Lottie Estrada (Organisation Name)
- Marian Rodgers (Organisation Name)
- Bertha Harmon (Organisation Name)
- Josephine Robinson (Organisation Name)
- Jonathan Moreno (Organisation Name)
- Glen Wolfe (Organisation Name)
- Seth Chambers (Organisation Name)
- Nettie Underwood (Organisation Name)
- Harold Wilkins (Organisation Name)
- Johnny Gross (Organisation Name)
- Maude Washington (Organisation Name)
- William Pope (Organisation Name)

# Creating a Collaboration

PRI Signatories and PRI's Network Supporters can create Collaborations. If you are a non-signatory stakeholder collaborating with PRI and wish to post a Collaboration, please contact [collaborations@unpri.org](mailto:collaborations@unpri.org).

The screenshot displays the user interface of the PRI My Collaboration Platform. On the left, a navigation sidebar includes options for 'My Collaboration Platform', 'All Collaborations', 'Resolution Database', and 'Find'. A blue button with a plus sign and the text '+ Create a collaboration' is highlighted with a red circle. An arrow points from this button to a text box. The main dashboard area features a 'Welcome back, Micheal!' greeting, a featured collaboration card for Starbucks titled 'Starbucks | Paid Family Leave', and a 'My collaborations' section with filter options for Type, Status, ESG theme, and Geography. A 'My tasks' panel on the right shows a list of tasks with due dates and a 'New Task' button. The bottom of the dashboard includes a 'My companies' section.

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'.



## Discussion

Start a discussion around a topic of interest

Create new



## Engagement

Engage with companies, policy makers and others on a range of ESG themes

Create new



## Information sharing

Share information, toolkits and research with other Collaboration Platform users

Create new



## Investor statement or letter

Invite investors to sign joint letters to companies and more

Create new



## Shareholder resolution

Request co-filers or urge other investors to vote in favour of shareholder resolutions

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. All information shared in this step will be displayed across the Collaboration Platform.

- **Collaboration image**
- **Collaboration name\***
- **Created by\***
  
- **Summary** – a short, one-line overview of the Collaboration
  
- Whether you are **actively seeking support** from collaborators, and until **what date**
  
- **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 in their Privacy settings.

Collaboration essentials | Step 1 of 5

Collaboration image (i)

You can select one media item.

Collaboration name\*

Created by\*

Created date\*

Summary\* (i)

**B I** |

A sample collaboration.

Content limited to 350 characters, remaining: 346

Collaboration status and deadline

Seeking support

Select this status option if you are actively seeking support from other collaborating organisations. For example, you might be looking for investors to join a corporate engagement, or for organisations to sign in support of a statement.

Select a date to indicate until when you will be seeking support from collaborating organisations. After this date, the Collaboration status will change from 'Seeking support' to 'Ongoing', if there isn't a hard deadline, please enter an approximate date in the future. This can be changed at a later date.

Deadline

Ongoing

Select this status option if your Collaboration is ongoing, but is not actively looking for support from other collaborating organisations. For example, if you have an active working group that is no longer accepting new members, or are simply sharing a useful informational resource.

Main contact\*

# Creating a Collaboration

In Step 2, you can add further Collaboration details and select visibility settings for these details.

- **Collaboration details \***
- **Objectives**
- **Attachments** – These should relate to the overall aim of the collaboration. Additional documents you only want to share with your Collaboration members can be added in the 'Files' tab once the Collaboration has been created.
- **Terms of reference**
- **Engagement focus organisations** – for example, individual companies, policy makers, regulators etc. who are the target of this collaboration.

Collaboration details | Step 2 of 5

Collaboration details\*  Visible only to Collaboration members  Visible to non-members

**B I** |

Objectives  Visible only to Collaboration members  Visible to non-members

**B I** |

Attachments  Visible only to Collaboration members  Visible to non-members

No file chosen

Upload requirements

Terms of reference  Visible only to Collaboration members  Visible to non-members

No file chosen

Upload requirements

Engagement focus organisations  Visible only to Collaboration members  Visible to non-members

By 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.

You can select one or more options for each field.

# Creating a Collaboration

In Step 3, you can add further Collaboration details. All information shared in this step will be displayed across the Collaboration Platform.

- **ESG theme \***
- **ESG sub-theme**
- **Sector**
- **Sustainable Development Goal \***
- **Geography \***
- **Asset class \***
- **Asset class subcategory**

*The following fields only apply to the collaboration type 'Resolution or vote':*

- **AGM date**
- **Linked resolution to the database**
- **Lead filer**
- **Co-filers**

Collaboration tags | Step 3 of 5

ESG theme\*  
Select an option

ESG sub-theme  
Select an option

Sector  
Select an option

Sustainable Development Goal\* ⓘ  
Select an option

Geography\* ⓘ  
Select an option

Asset class\* ⓘ  
All

Asset class subcategory  
Select an option

AGM date  
06/06/2022

Linked resolution from the database ⓘ  
↕

Lead filer ⓘ  
Select an option

Co-Filers  
Select an option

Delete Save and finish Back Next

You can select one or more options for each field.

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 4, you can select your Collaboration's visibility.

- **Visibility of Collaboration \***
  - **Public** – all registered users will be able to request to join, irrespective of user type
  - **All Collaboration Platform users** – anyone can register for the Collaboration Platform
  - **Only selected 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 the collaboration member list if 'Publicly' is selected.

Collaboration privacy settings | Step 4 of 5

Visibility of Collaboration\*

Public

All Collaboration Platform users

Only selected user types

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

Only invited users

Visibility of Collaboration member list\*

Public

All Collaboration Platform users

Only members of this Collaboration

Only owners of this collaboration

Delete Save and finish Back Next

PRI signatories

# Creating a Collaboration

In Step 5, you have the **option to edit the tabs** which are visible in the Collaboration and select the Default landing tab when someone enters the Collaboration.

You also have the **option to add sign up questions and file requests** 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.

Collaboration page options | Step 5 of 5

### Enable Collaboration page tabs

- Activity Tab
- Files Tab
- Calendar Tab
- Subspaces Tab
- Tasks Tab
- External Content Tab @

### Default tab for members of the Collaboration

Activity Tab

### Add sign-up questions and request files

#### Add sign-up questions

When users request to join this Collaboration, they'll be asked any question(s) you enter here. Questions might include requesting a user's email address, or asking for an investor's assets under management.

✦

Remove

Response required from user

Text  Choice

✦  ✖

✦  ✖

Allow multiple answers

#### Add sign-up file request

When users request to join this Collaboration, they'll be asked to upload a file. Use the below text field to explain what type of file you would like them to share, for example, "Please upload your organization's logo here".



# 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.

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.

Terms of reference Step 5 of 5

Enable terms of reference

Terms of reference document name

Terms of reference

Choose file No file chosen

Upload requirements

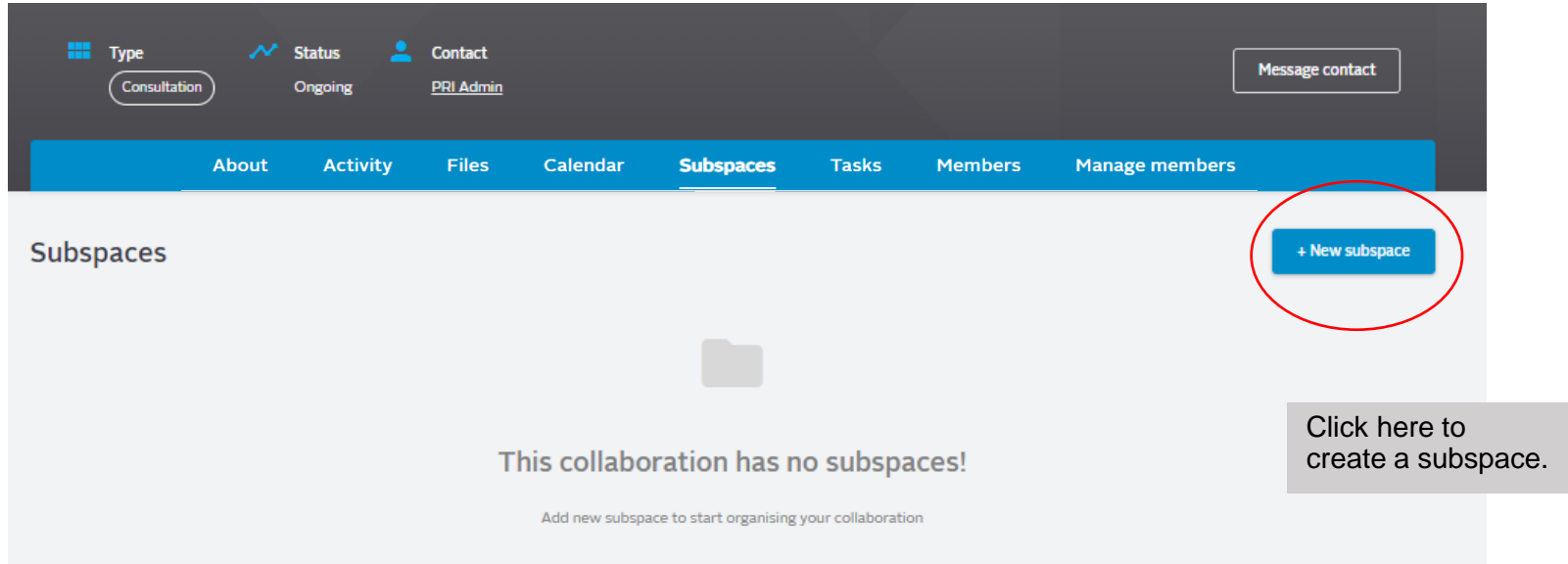
Collaboration settings

By creating this group, you and other owners of this collaboration will be opted-in to receive messages from users on the Collaboration Platform. By proceeding, you are accepting these terms.\*

Back Save as draft Submit

# Managing a Collaboration: Creating subspaces

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



- Multiple subspaces can be created within a Collaboration, but a subspace cannot be created within a subspace.
- In a subspace you can invite members, add files, create events and share posts.
- Note that subspaces are not available in discussion type Collaborations.

# Managing a Collaboration: Manage members tab

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

Home Files Calendar Subspaces Tasks Member **Manage members** Engagement focus

Export Invite members

Select / unselect all 3 members across all the pages

0 Members are selected

Clear selection on all pages

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

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

<input type="checkbox"/>	Member	Organisation	Role	Member type	Joined date	Operation
<input type="checkbox"/>	AssetOwner	Company 1	Member	Member	Member invited	Actions
<input type="checkbox"/>	NetworkSupporter	Company 1	Member	Member	10 December 2021	Actions
<input type="checkbox"/>	Asset Owner	Company 1	Member	Member	10 December 2021	Actions

# Managing 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.

Home Files Calendar Subspaces Tasks Members **Manage members** Engagement focus

Export Invite members

Select / unselect all 3 members across all the pages

Members are selected

Clear selection on all pages

<input type="checkbox"/>	Member ID	Organisation	Role	Member type	Joined date	Operation
<input type="checkbox"/>	AssetOwner	Company 1	Member	Member	Member invited	Actions
<input type="checkbox"/>	NetworkSupporter	Company 1	Member	Member	10 December 2021	Actions
<input type="checkbox"/>	Asset Owner	Company 1	Member	Member	10 December 2021	Actions

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

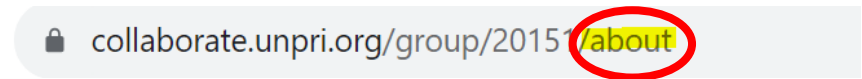
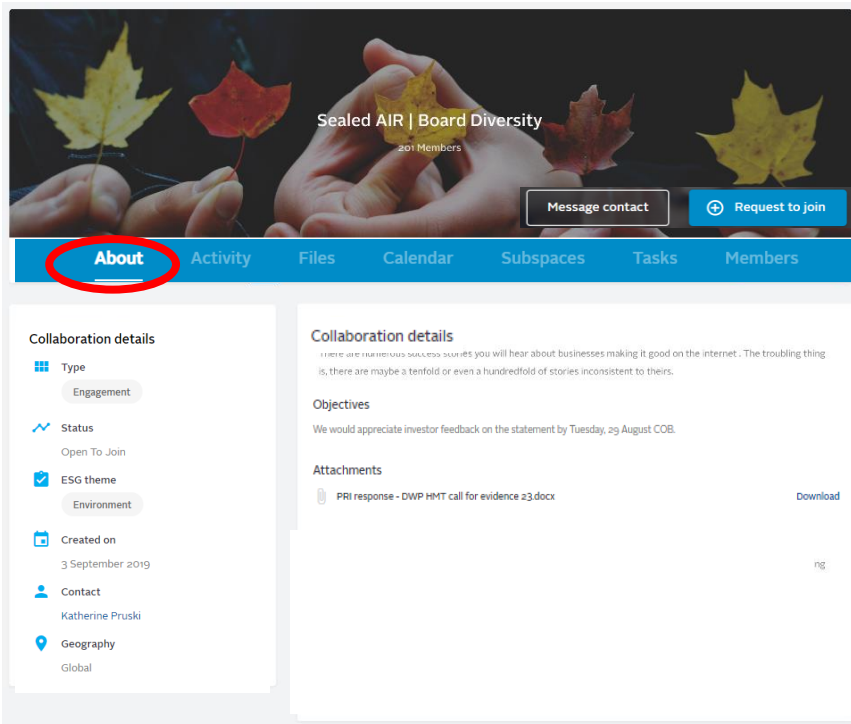
Clicking the dropdown arrow next to a member displays actions that a Collaboration Owner can take for that member.

- Approve
- Reject membership
- Edit
- Sign up questions
- Remove from group
- View

# Sharing the correct collaboration link with non-members

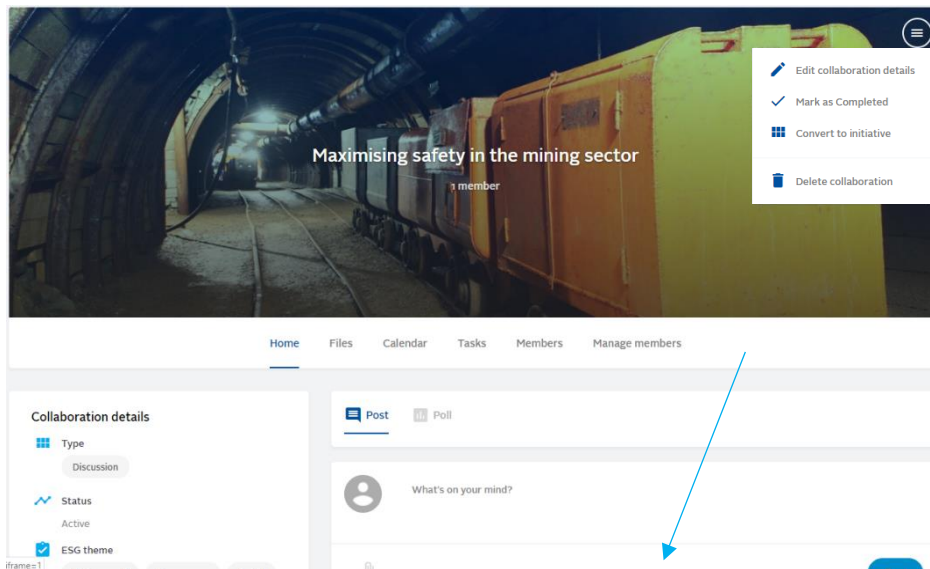
To share a collaboration URL with non-members, make sure you are on the 'About' section when you copy the URL. The link should end with '/about'.

Copying and sharing the collaboration link from any other sections (Ex: Task, Calendar) will prevent non-members from accessing the collaboration



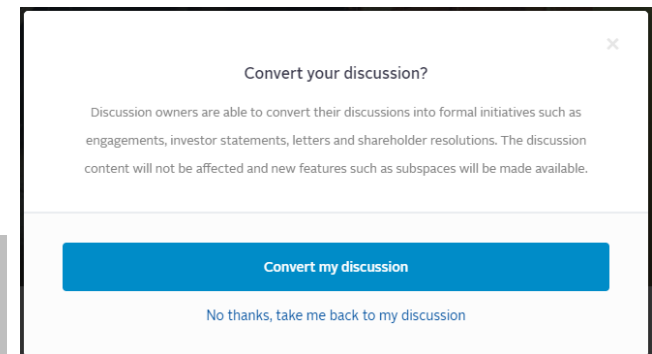
# Converting a discussion

Discussions can be used to gauge investor interest for a topic before launching formal Collaboration. 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.



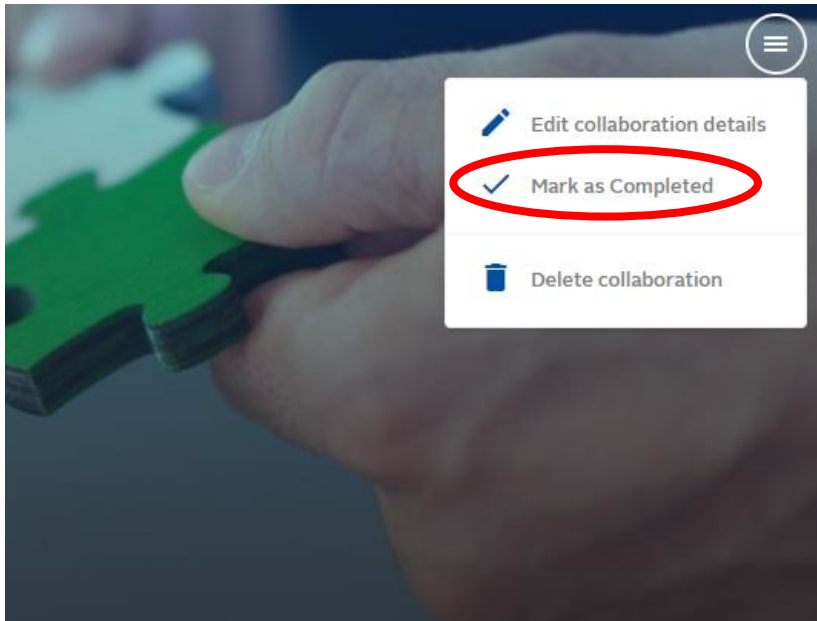
Click on the edit button on the top right-hand corner of your Collaboration and select 'Convert to initiative'

Select 'Convert my discussion'. You will then be asked to choose a new Collaboration type.



## 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.

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

Objectives

**B** *I* |   |  

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

Outcome

Enter the outcomes of the Collaboration.

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

Cancel

Submit

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](mailto:collaborations@unpri.org).