# The PRI Collaboration Platform user guide

A hub for investors, NGOs and academics to collaborate.

Last updated: 15 August 2023

Please direct any queries to collaborations@unpri.org

An investor initiative in partnership with UNEP Finance Initiative and UN Global Compact

# Contents

# 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:

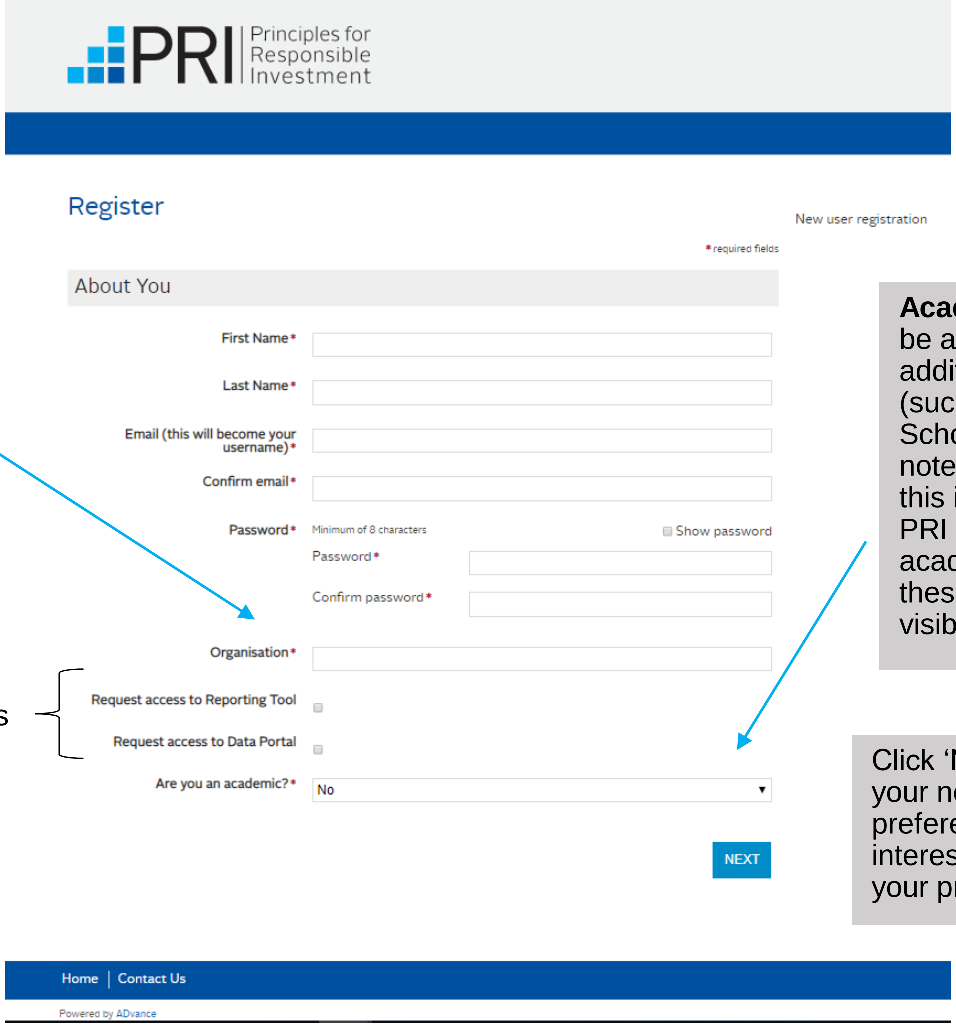
- invitations to sign joint letters to companies;
- joint investor-company engagements;
- proposals for research;
- calls to foster dialogue with policy makers; or
- requests for support on upcoming resolutions or votes.

**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]



PRI Principles for Responsible Investment

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? * No

NEXT

Home | Contact Us

Powered by ADvance

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

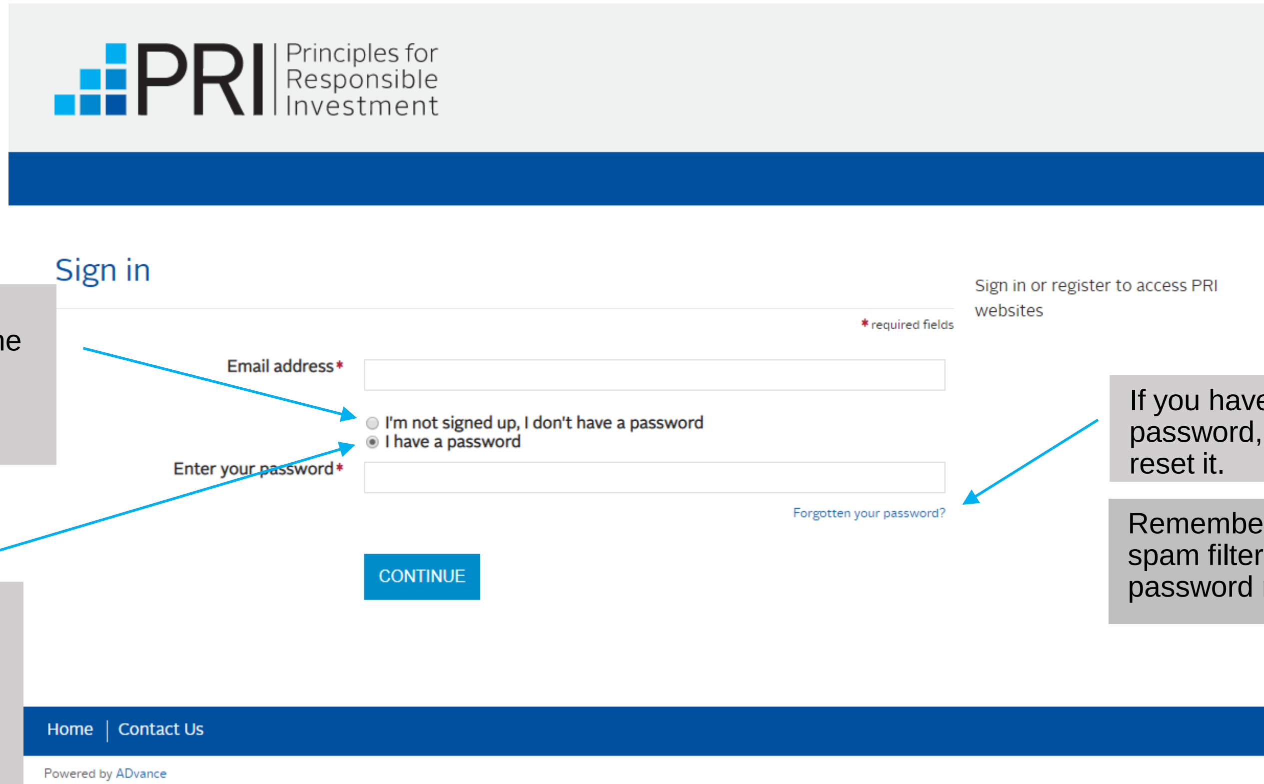
For PRI signatories only

**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.

# Logging into the Platform

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




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

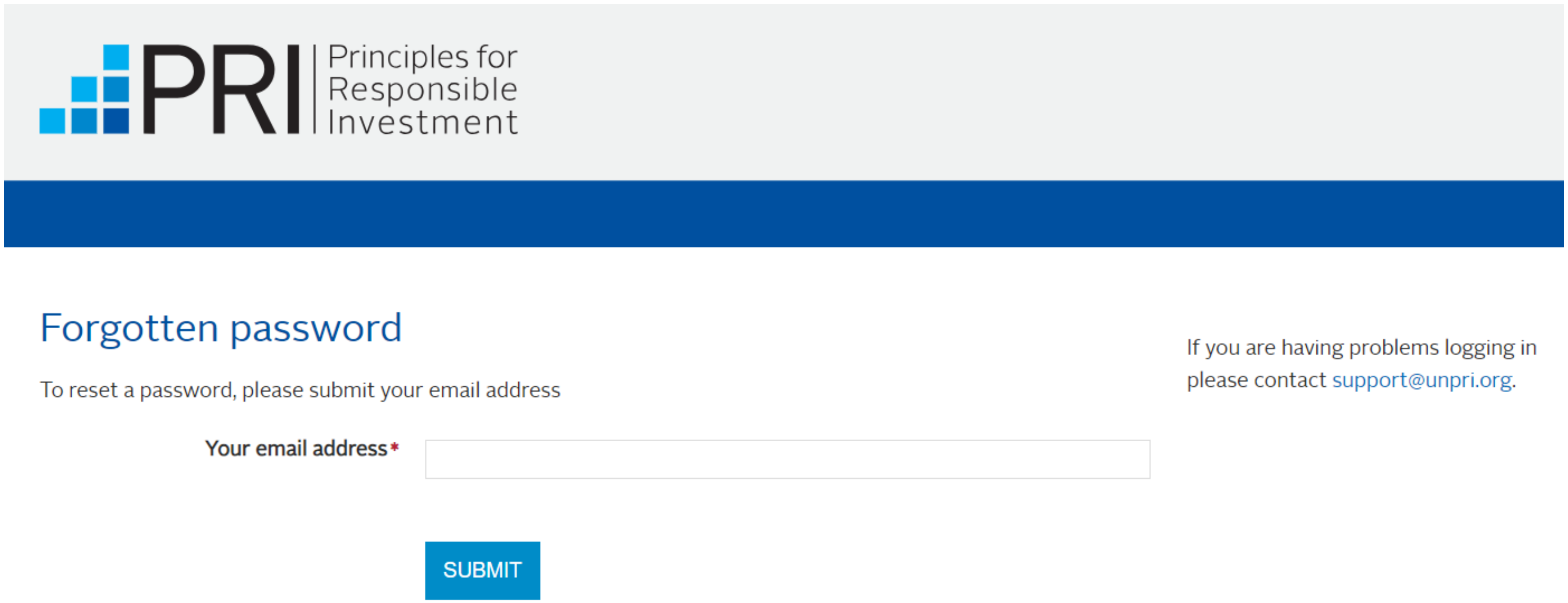
If you have a PRI password, tick the bottom box, enter your email address and password and select Continue.

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

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

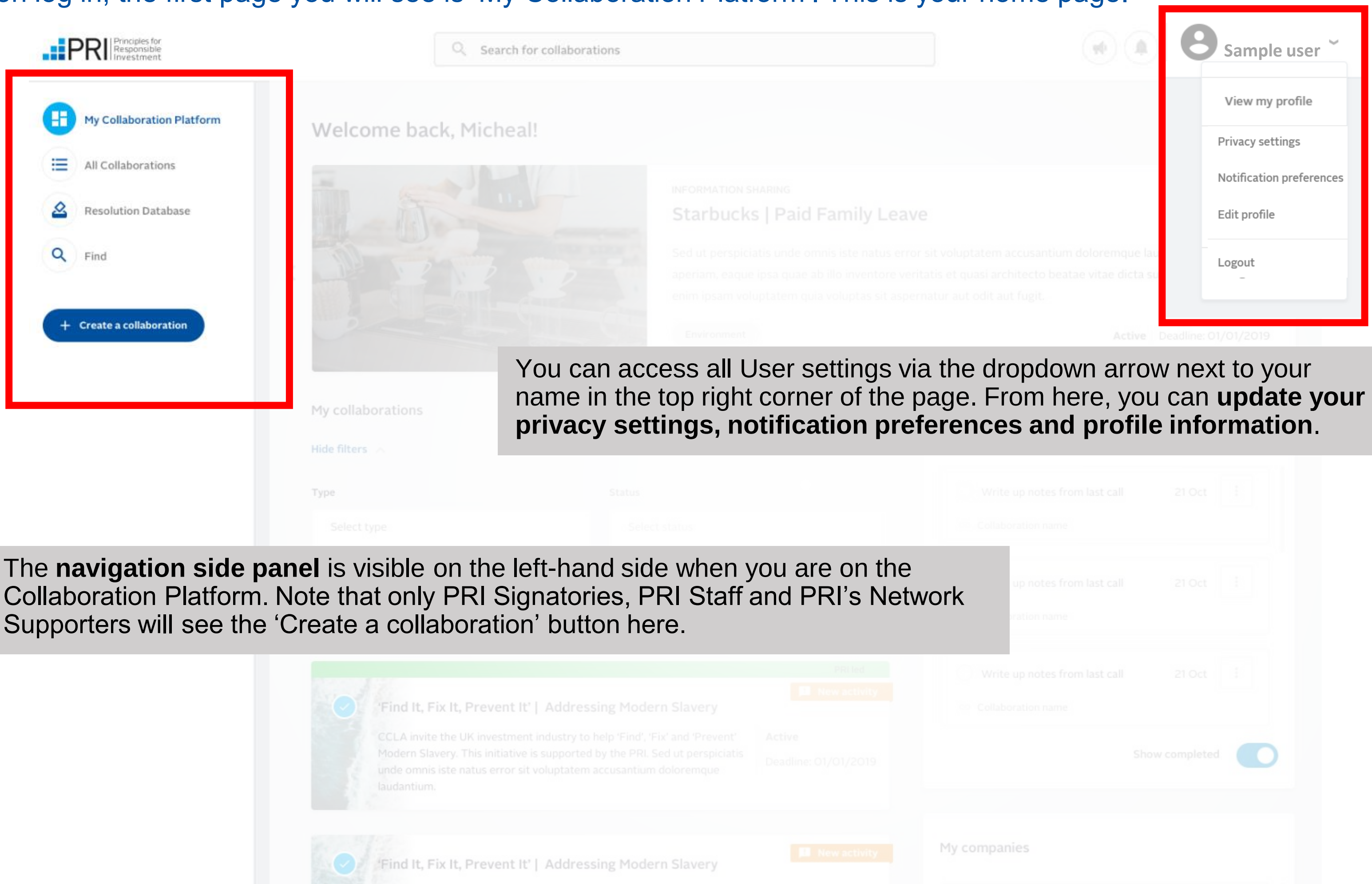
# Resetting a forgotten password

Use this link to recover your missing password



# 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**.

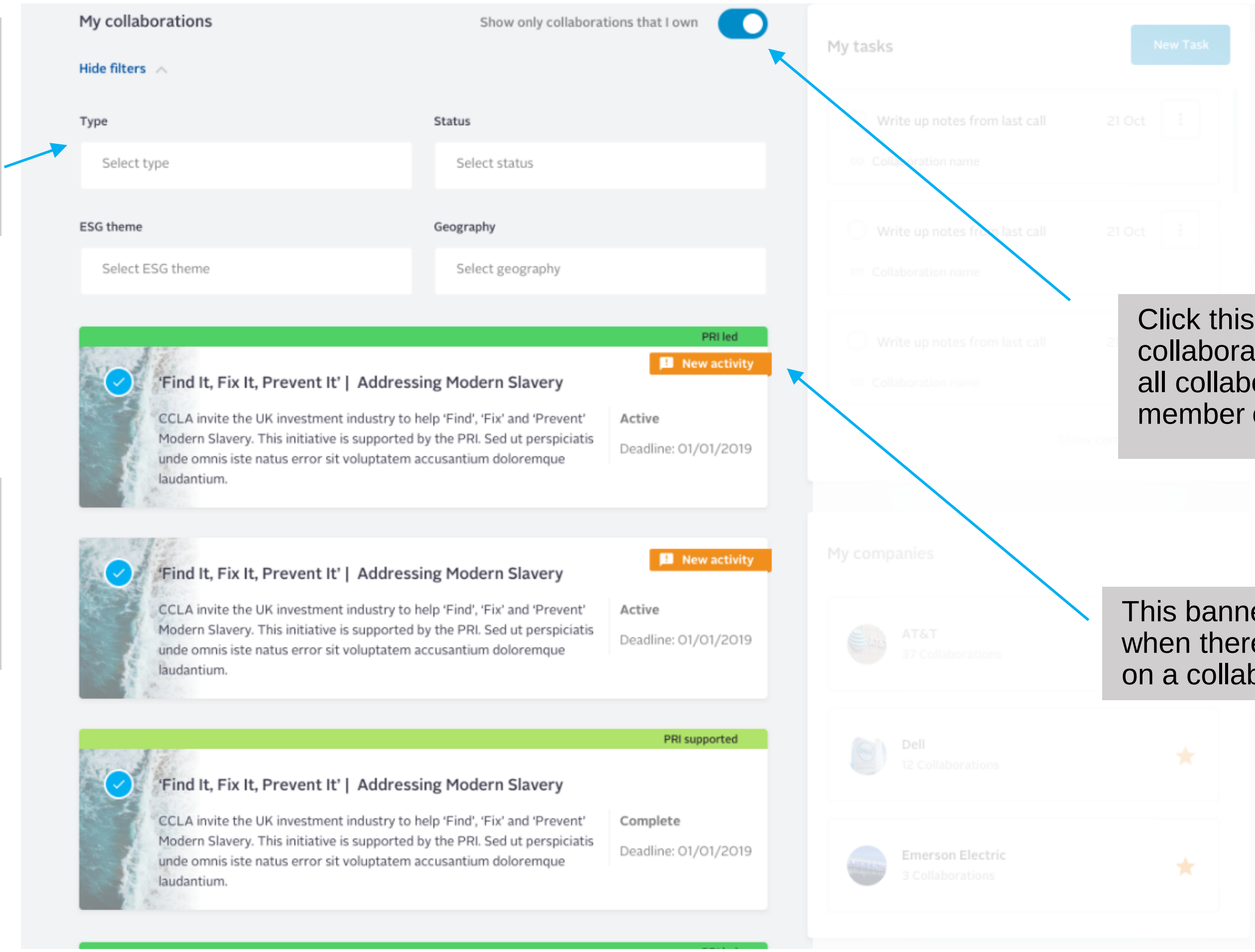
The **navigation side panel** is visible on the left-hand side when you are on the Collaboration Platform. Note that only PRI Signatories, PRI Staff and PRI’s Network Supporters will see the ‘Create a collaboration’ button here.

# 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.

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

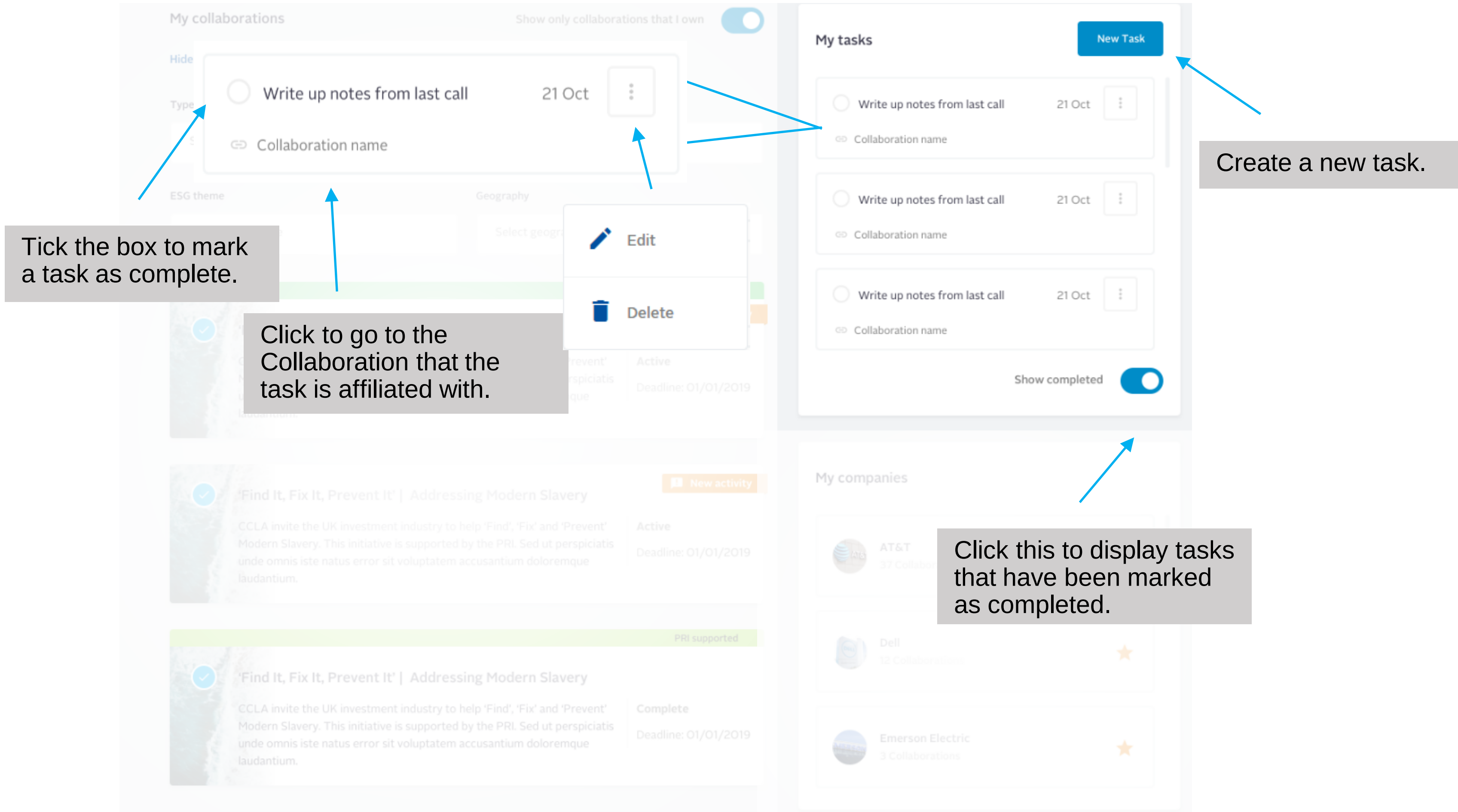



Click this to toggle between collaborations you own and all collaborations you are a member of.

This banner will appear when there is **new activity** on a collaboration.

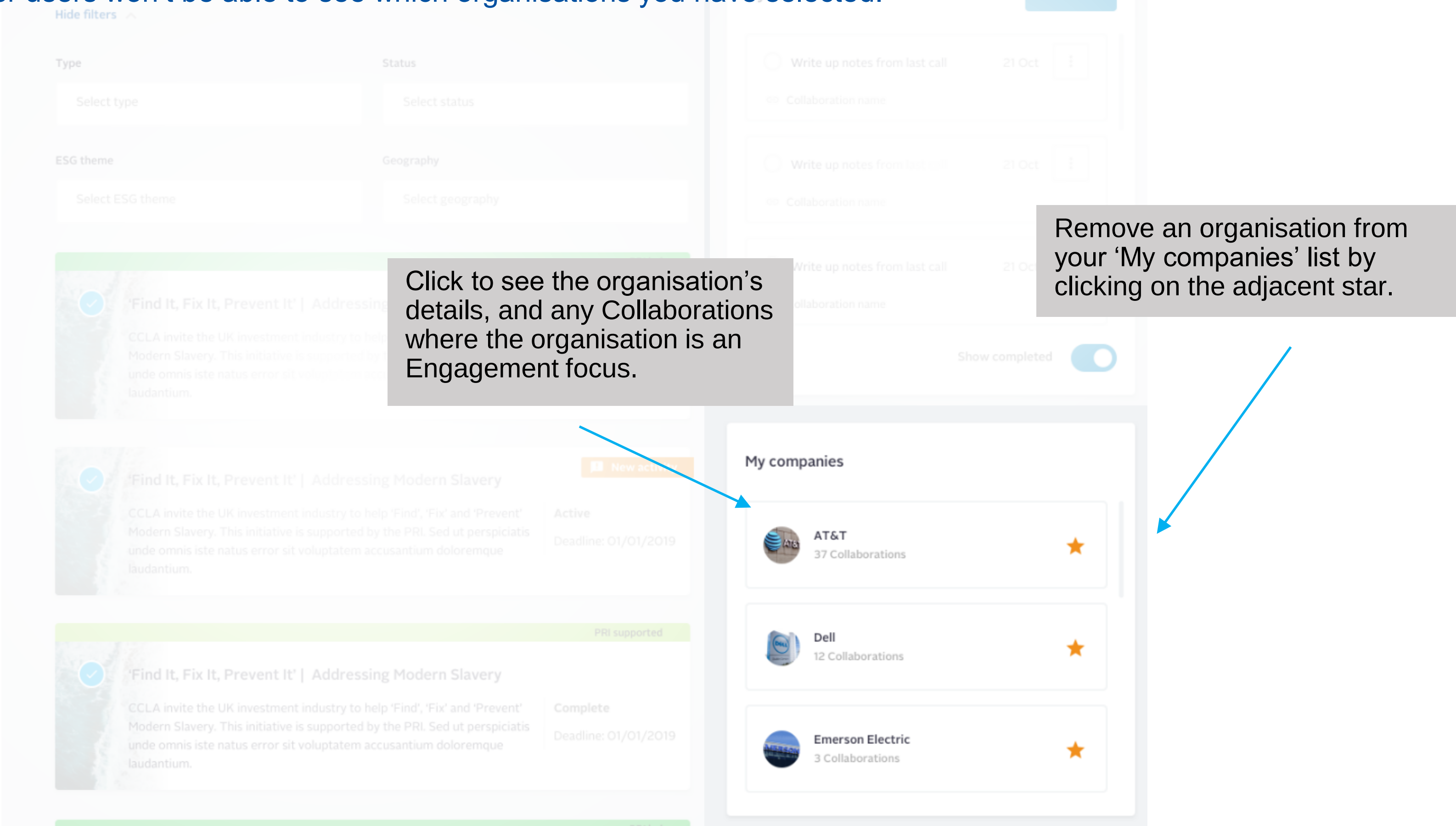
# My Collaboration Platform: My tasks

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



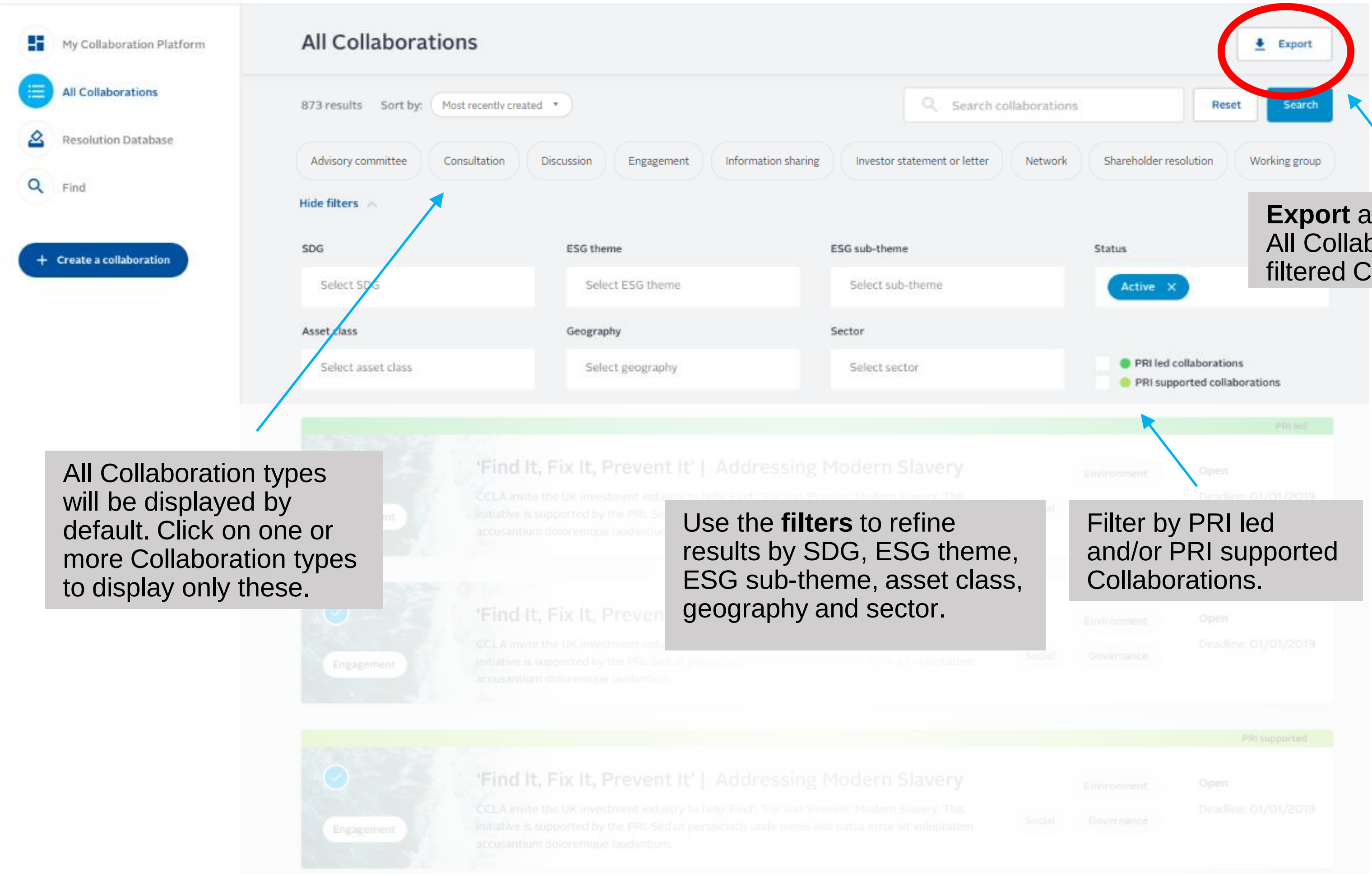
# My Collaboration Platform: My companies

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.



# 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.

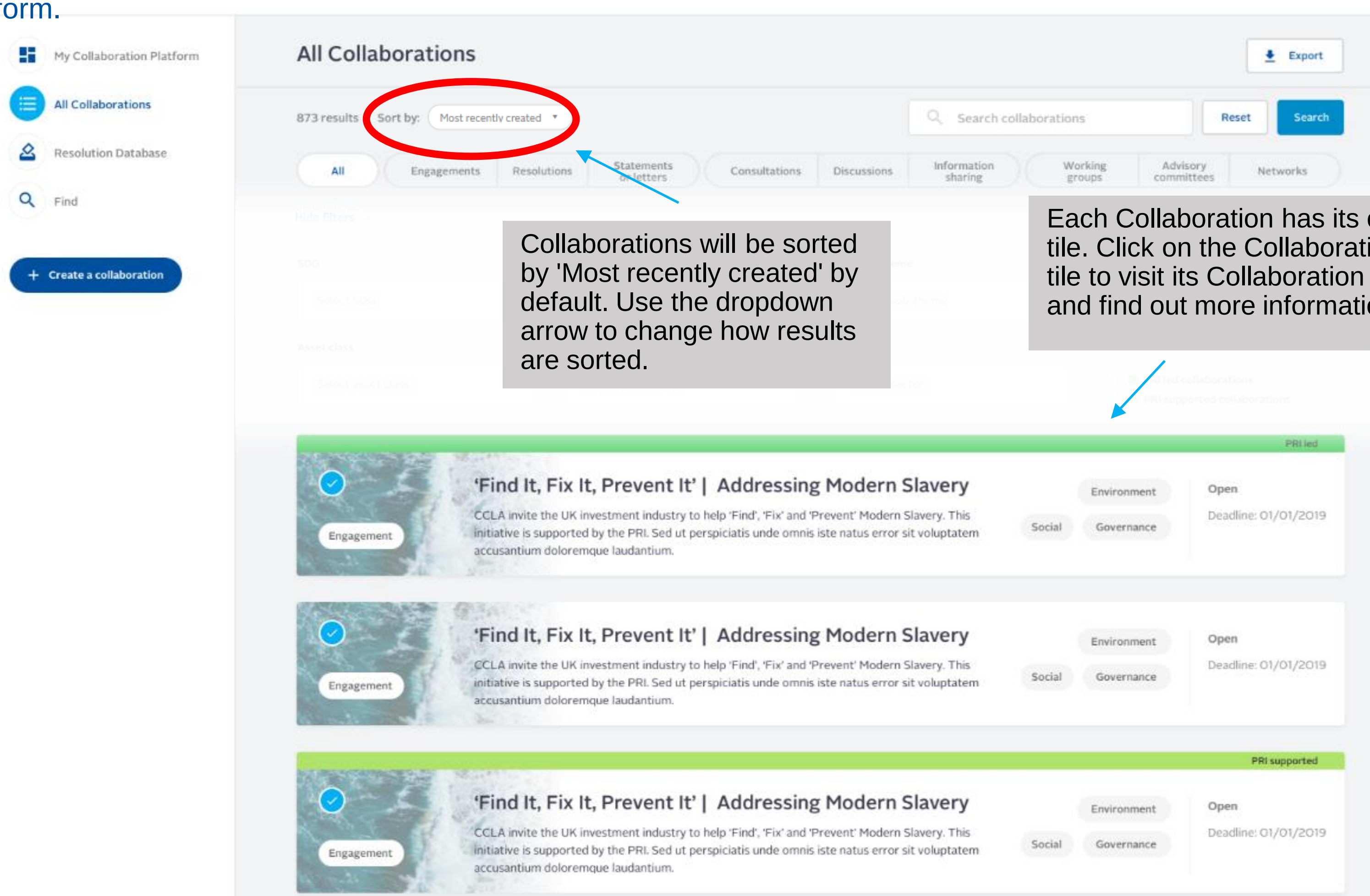
All Collaboration types will be displayed by default. Click on one or more Collaboration types to display only these.

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.

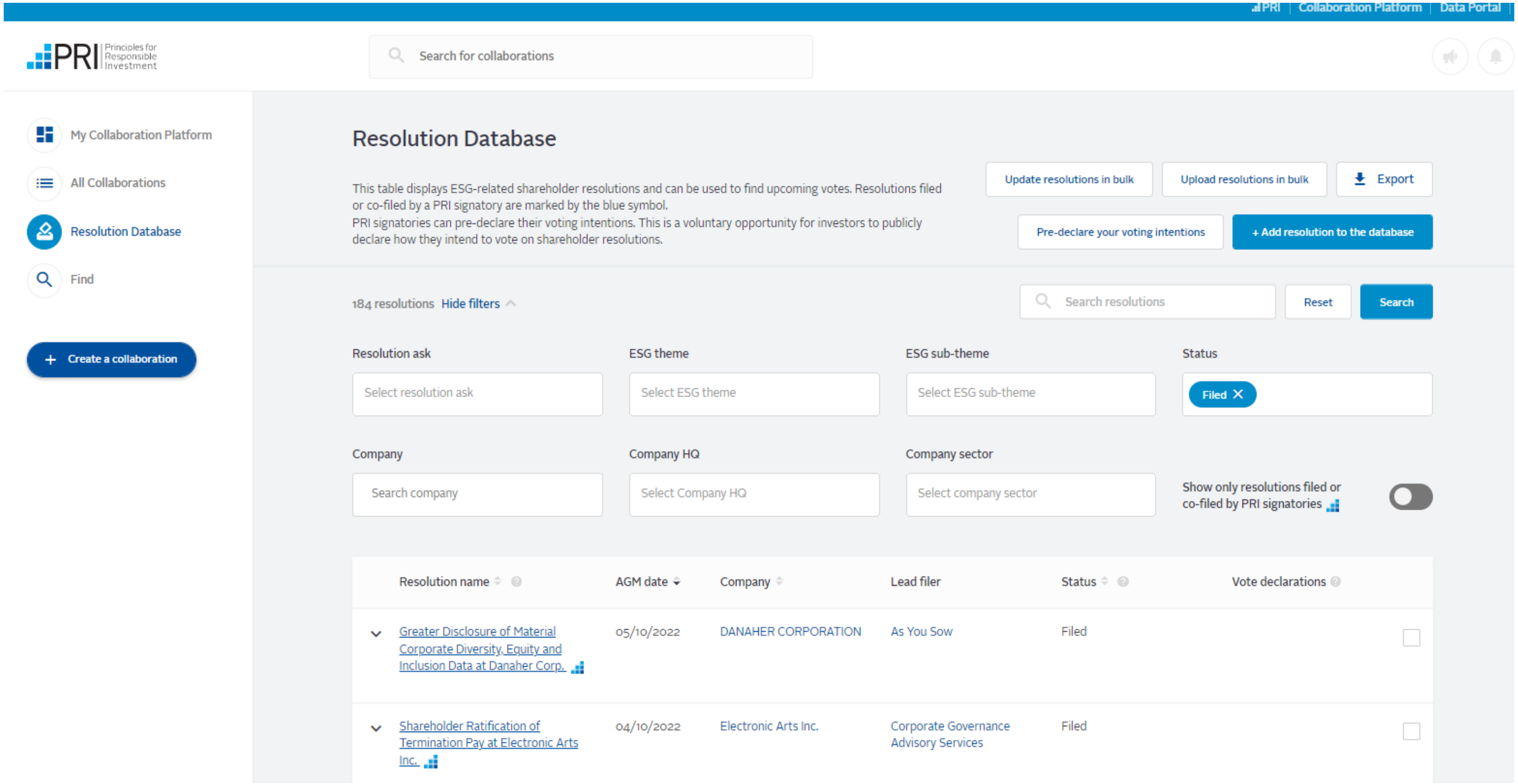



Collaborations will be sorted by 'Most recently created' by default. Use the dropdown arrow to change how results are sorted.

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

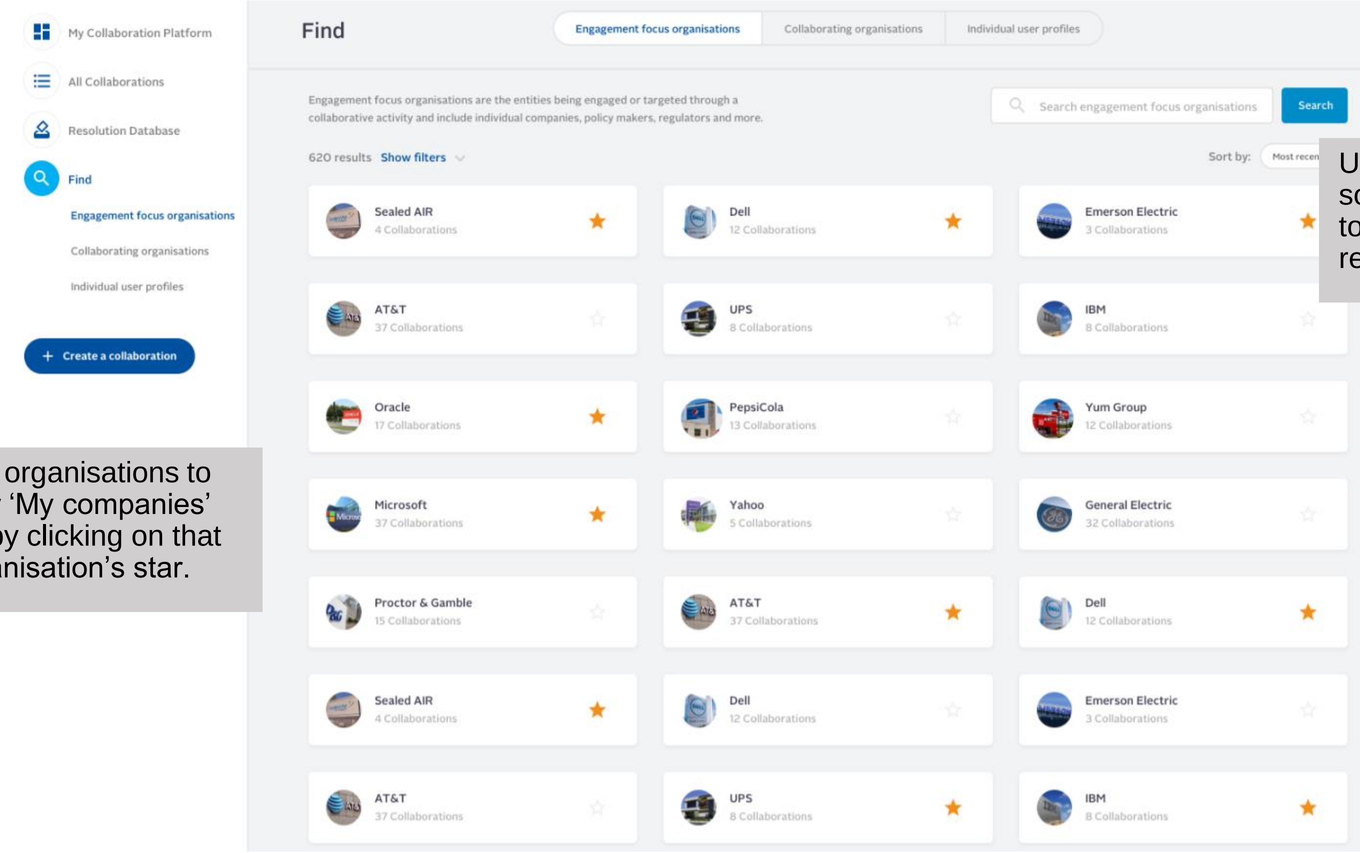
# Resolution Database

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](#).



# 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 to do so.

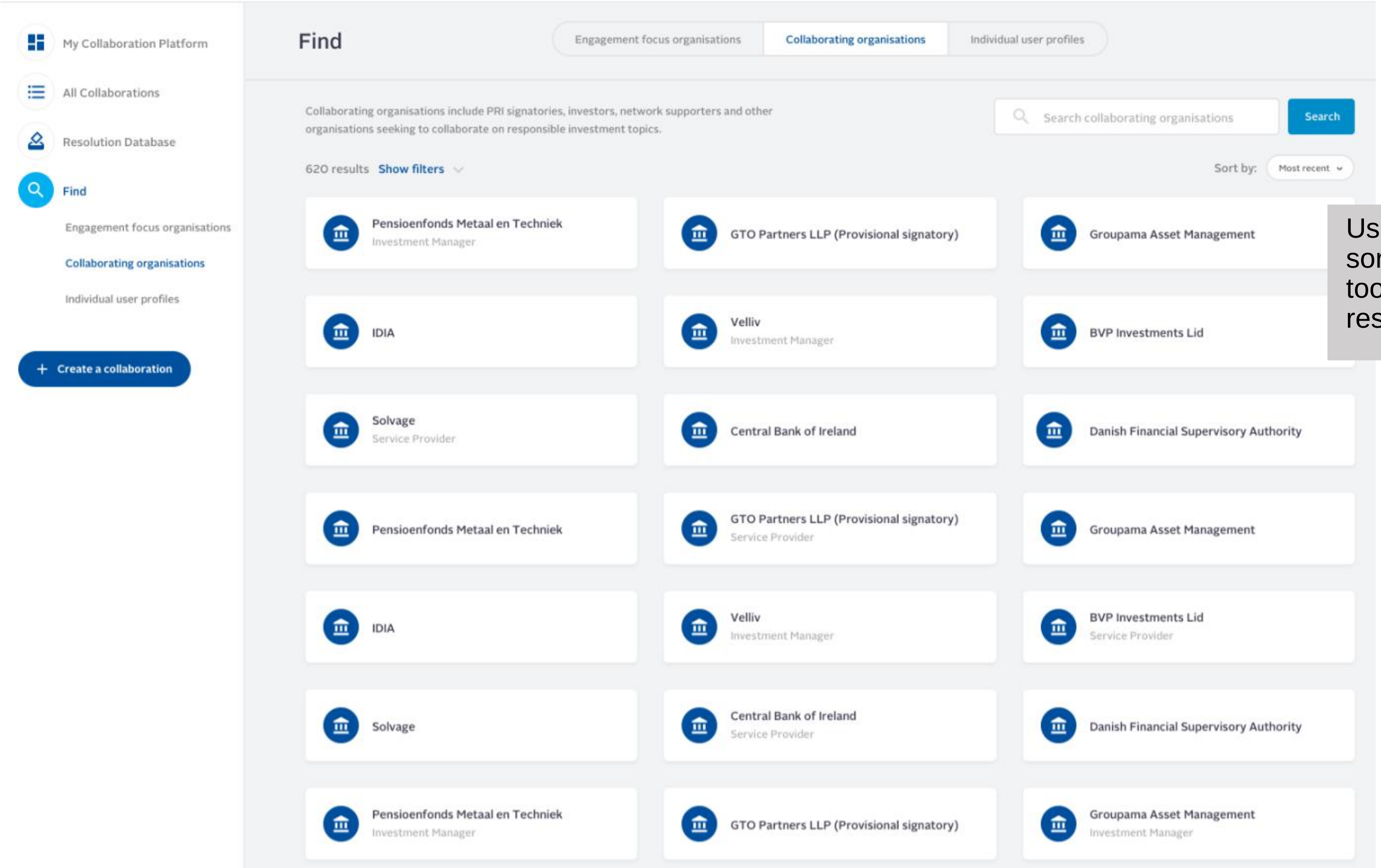



Use the searching, sorting and filtering tools to refine your results.

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

# Find: collaborating organisations

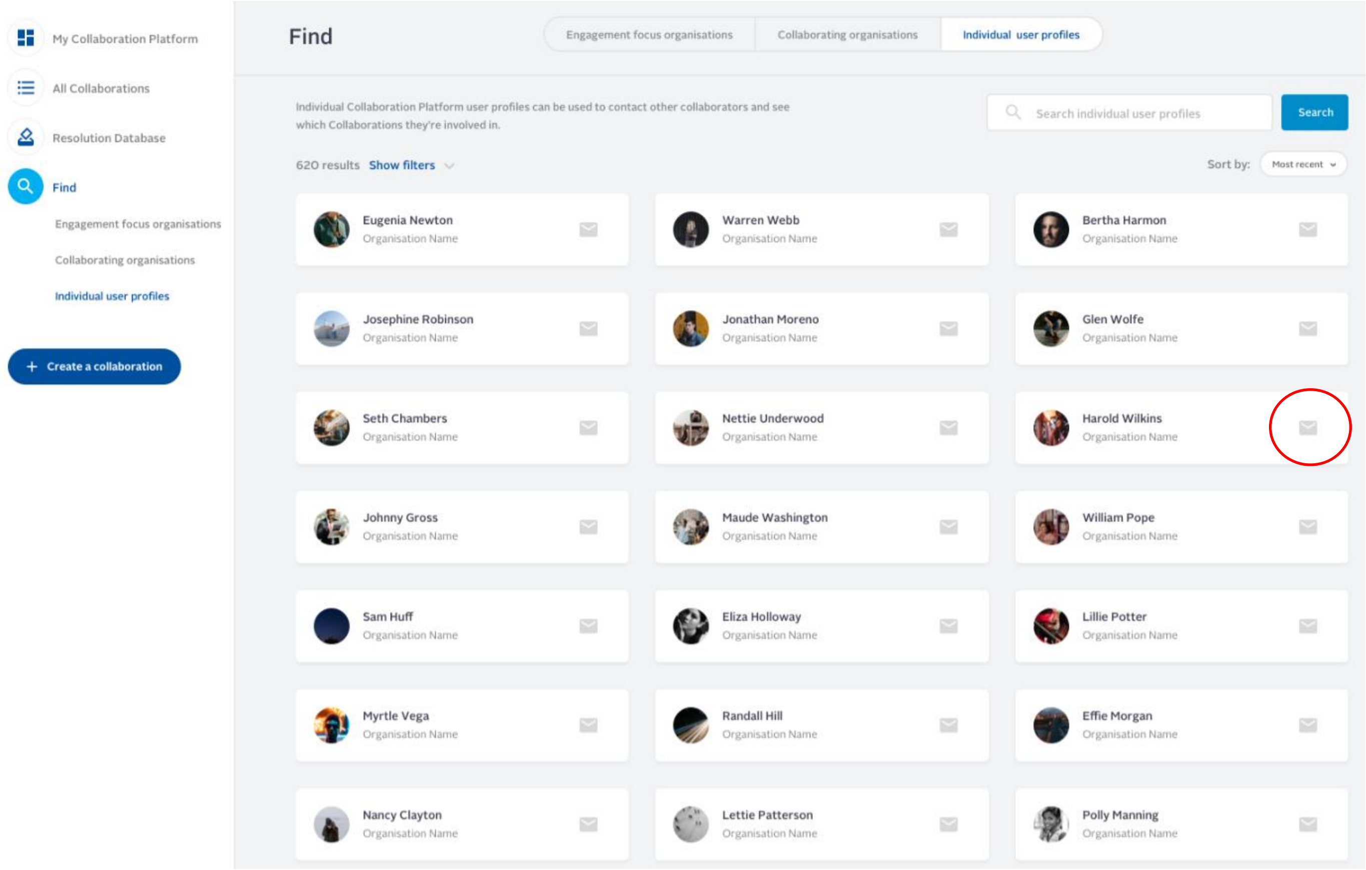
Organisations seeking to collaborate on responsible investment topics will appear here. This includes PRI signatories, investors, network suppliers and other organisations.




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 17) 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.

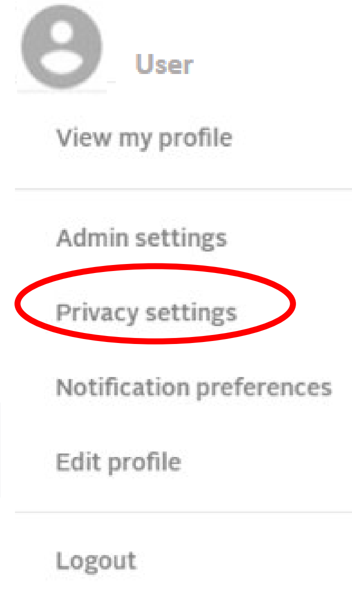
Click on the envelope to **send a message**. Please note, messages are not stored on the Platform and are directed to the user's email.

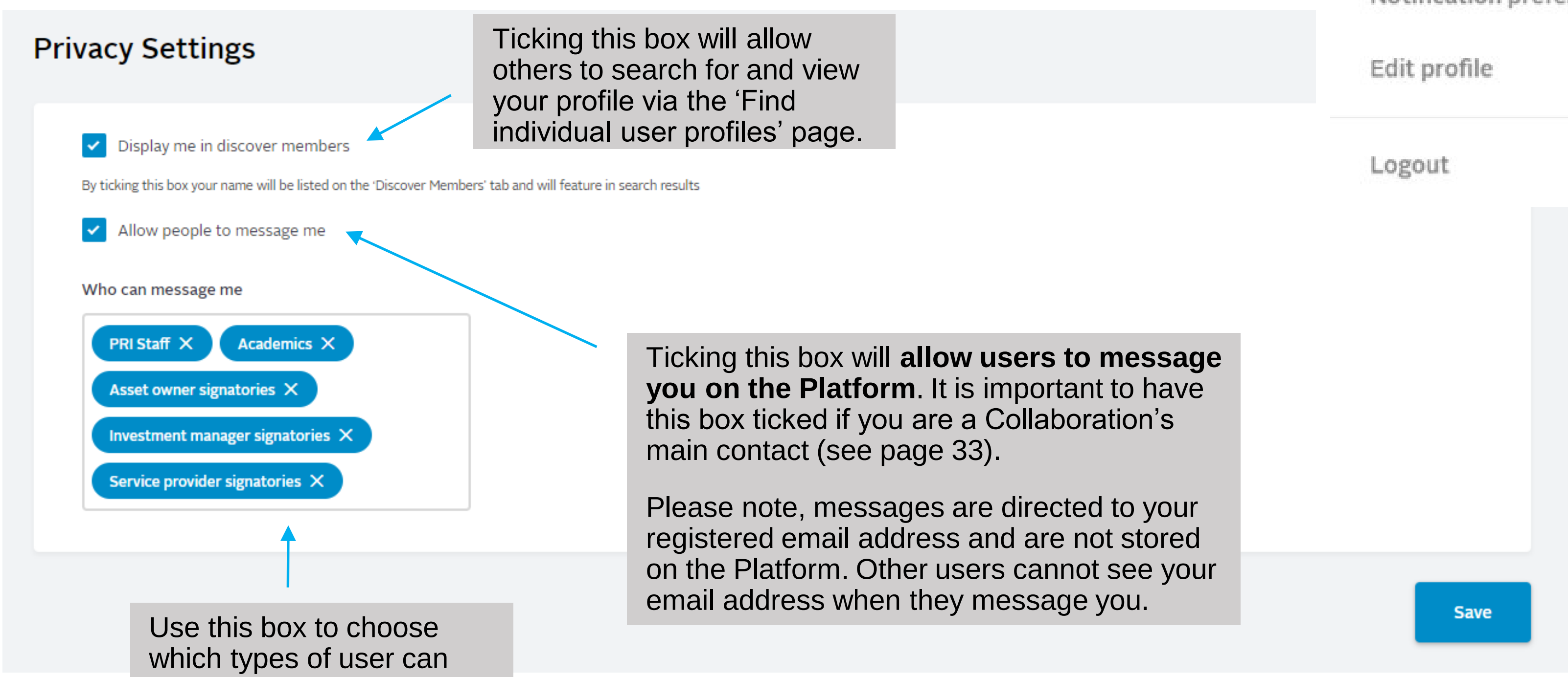
Click on the user's name to view their profile.

# 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’.




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

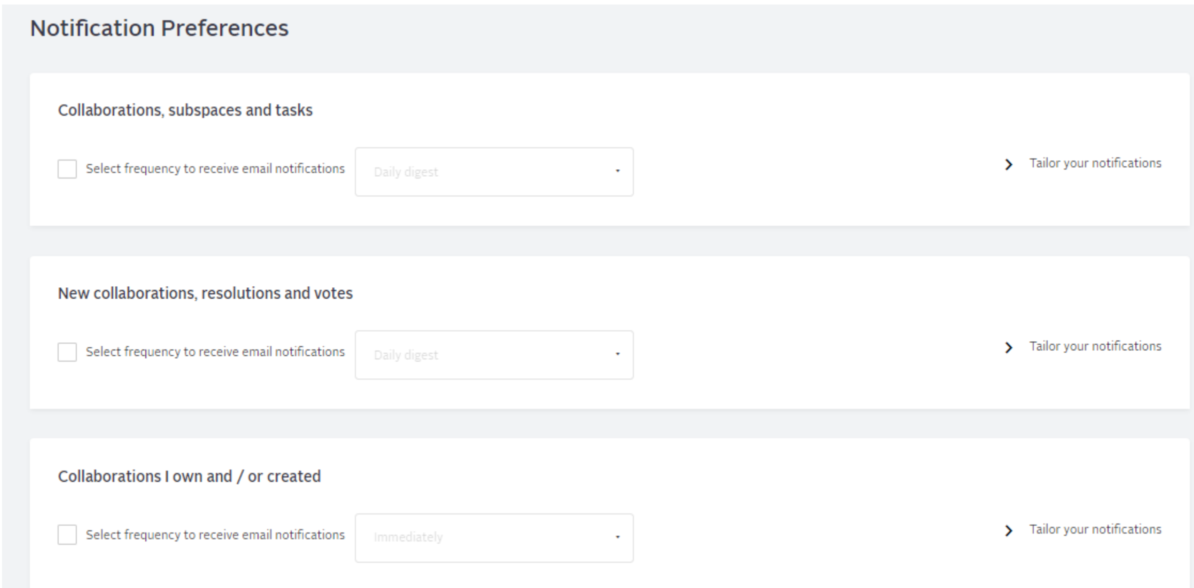
Ticking this box will **allow users to message you on the Platform**. It is important to have this box ticked if you are a Collaboration’s main contact (see page 33).

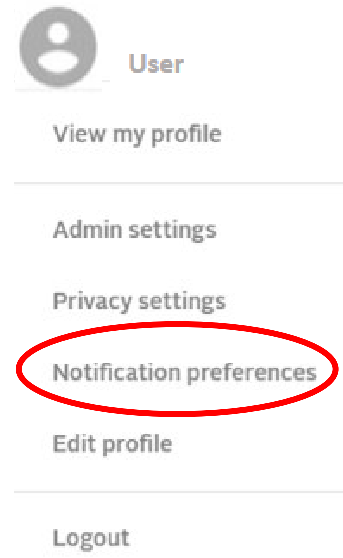
Please note, messages are directed to your registered email address and are not stored on the Platform. Other users cannot see your email address when they message you.

Use this box to choose which types of user can message you/

# 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.

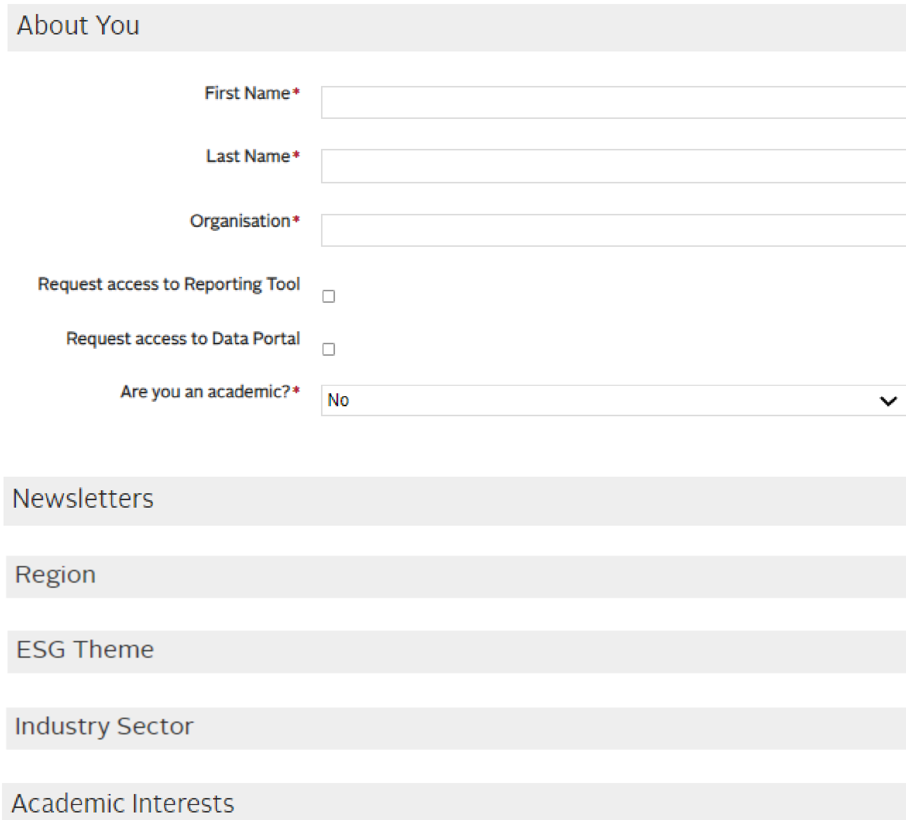


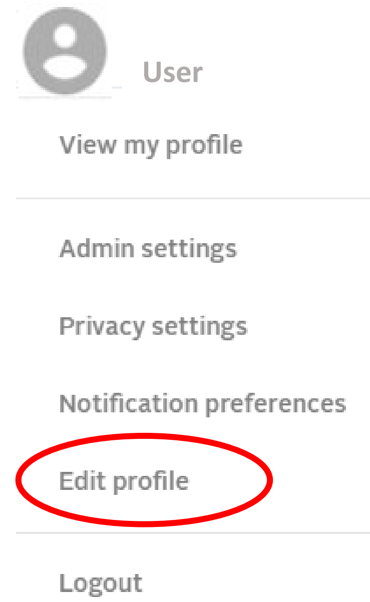




Access your notification preferences by clicking on your name in the top right-hand corner of the screen, then clicking ‘Notification Preferences’.

# User settings: edit profile

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

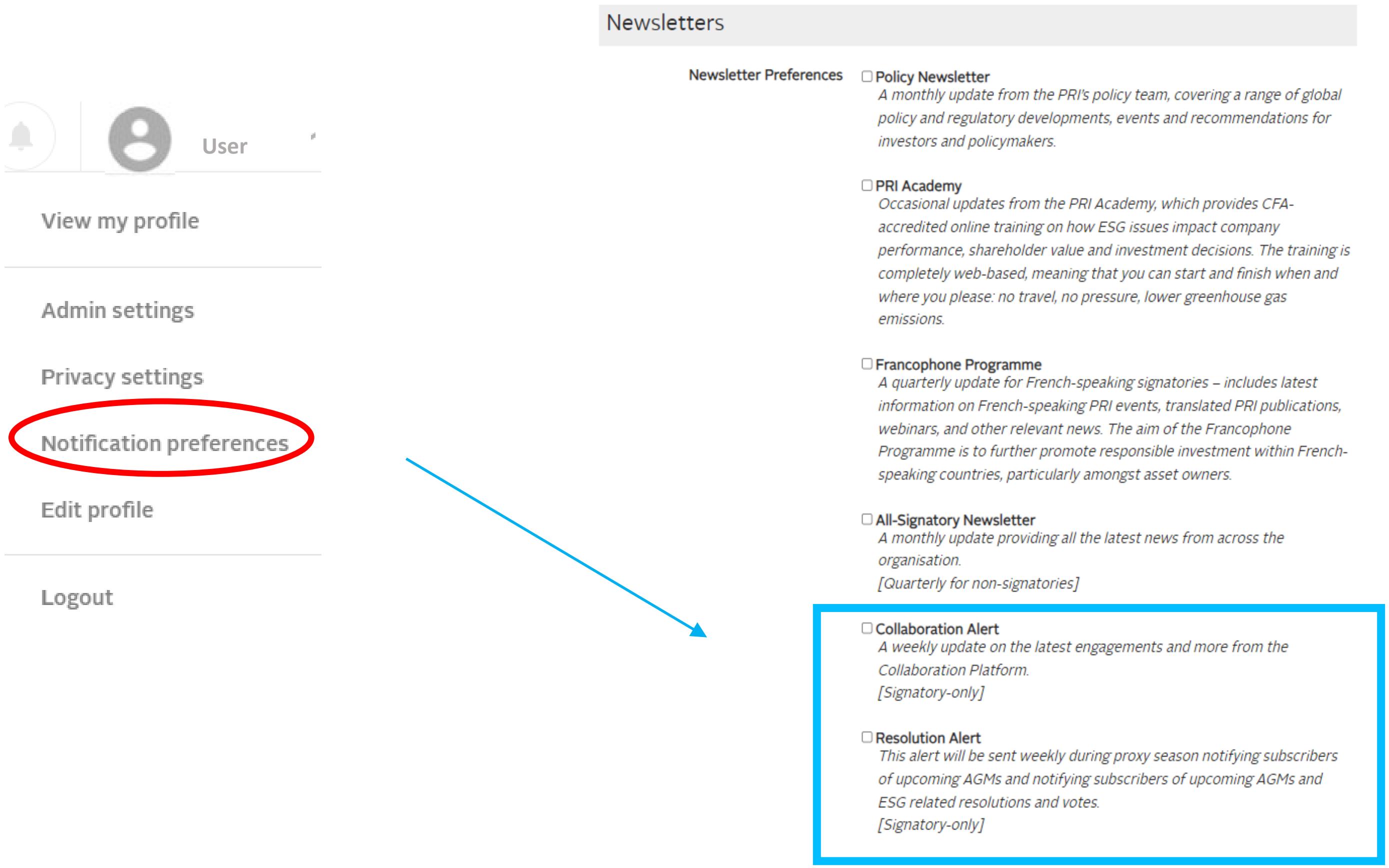



Edit your profile by clicking on your name in the top right-hand corner of the screen, then clicking ‘Edit profile’.

# 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.



# Joining a Collaboration

Each Collaboration has a member status symbol. The symbol indicates your membership status for that particular collaboration.

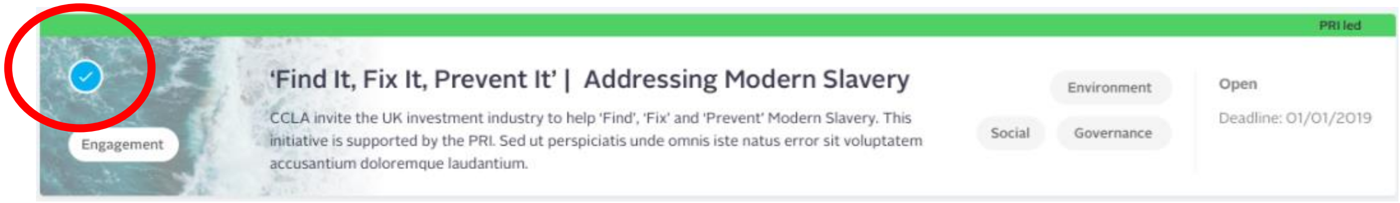
You are not a member of the Collaboration – you can request to join the Collaboration by clicking on the symbol.

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.

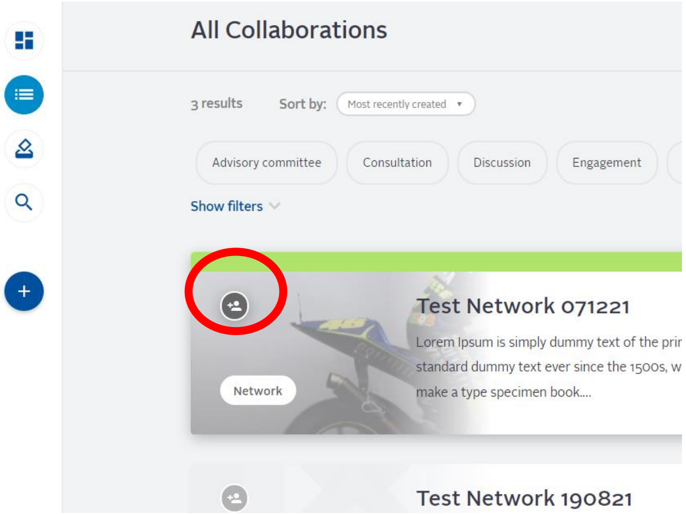
You are unable to join this Collaboration due to its privacy settings.



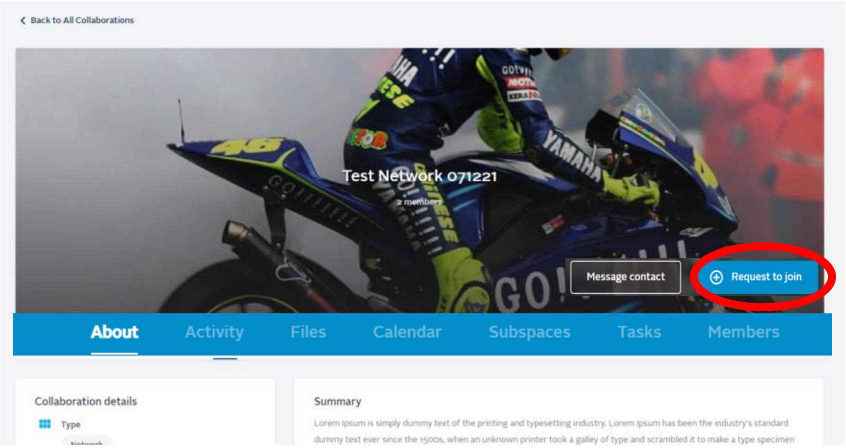
# Joining a Collaboration (1) – request to join on the platform

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

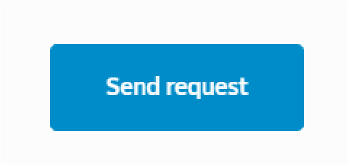
**Option 1)** On the All Collaborations page, click this symbol.




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

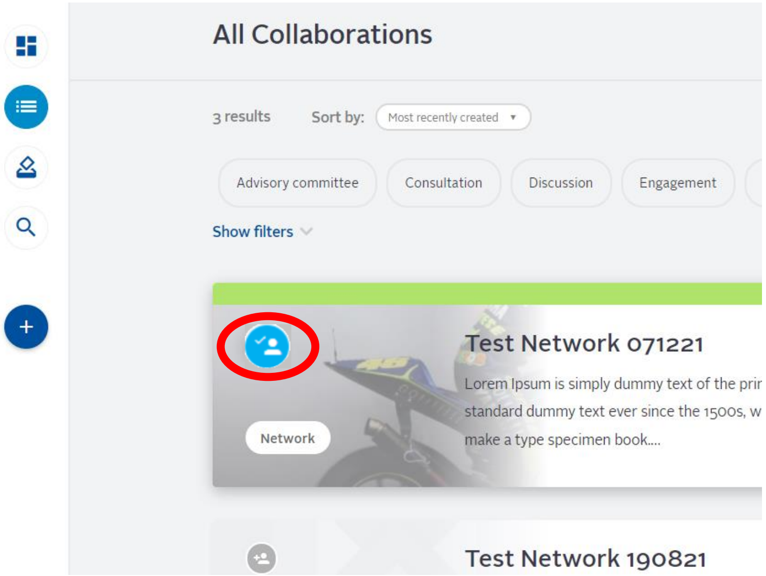

- Choosing either option 1 or option 2 will make a pop-up window appear.
- You may be asked to answer sign-up questions that the Collaboration Owner has set or agree to the Collaboration's terms of reference.
- Once complete, click 'Send request'.



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

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

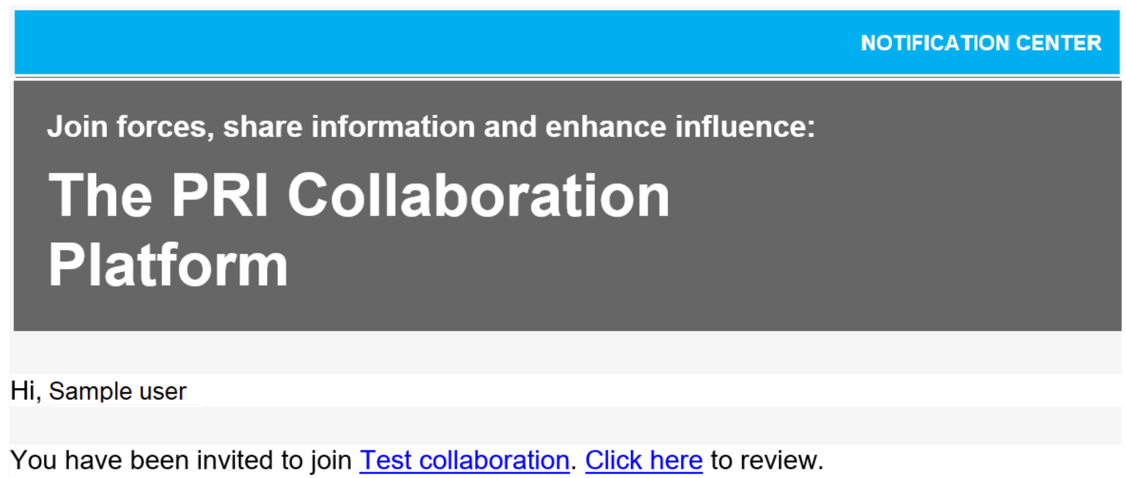
- This symbol means that you have been invited by the Collaboration Owner to join a collaboration. 
- Respond to the invitation by clicking on the symbol.



# 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.


NOTIFICATION CENTER

Join forces, share information and enhance influence:

The PRI Collaboration Platform

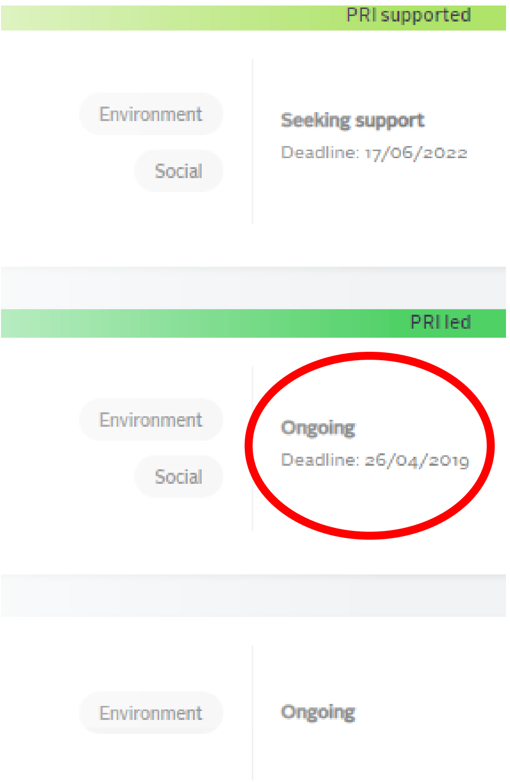
Hi, Sample user

You have been invited to join Test collaboration. Click here to review.

# 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.

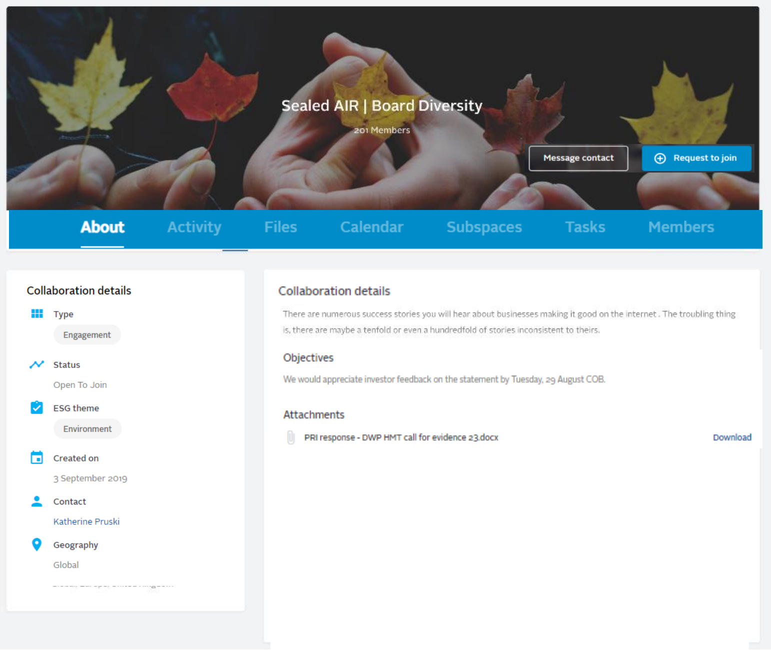



On the 'All Collaborations' page, each Collaboration's status can be seen on the right-hand side.

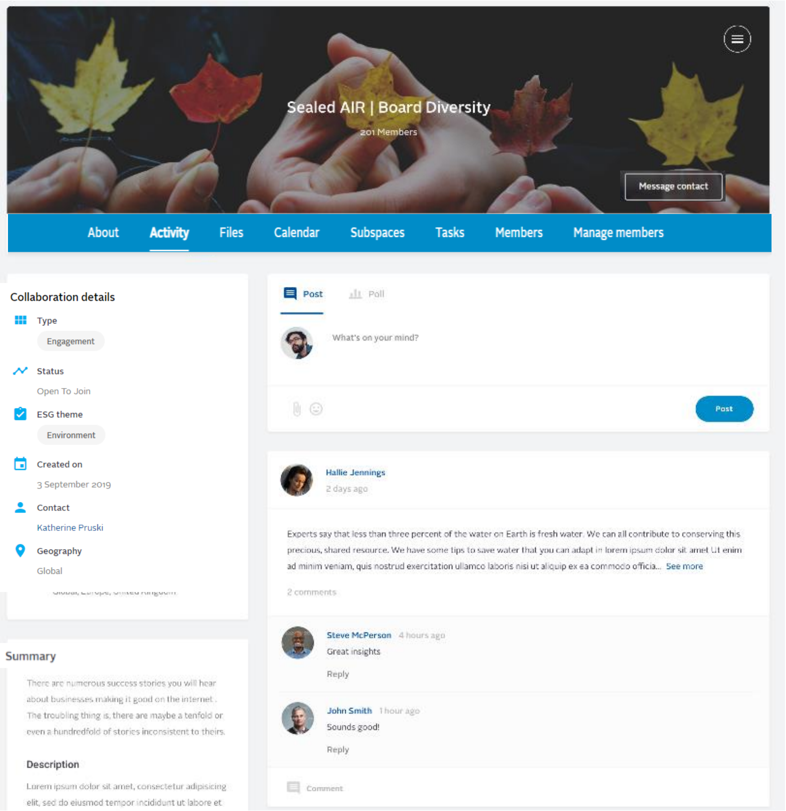
# Individual Collaboration pages

## 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:



# Individual Collaboration pages

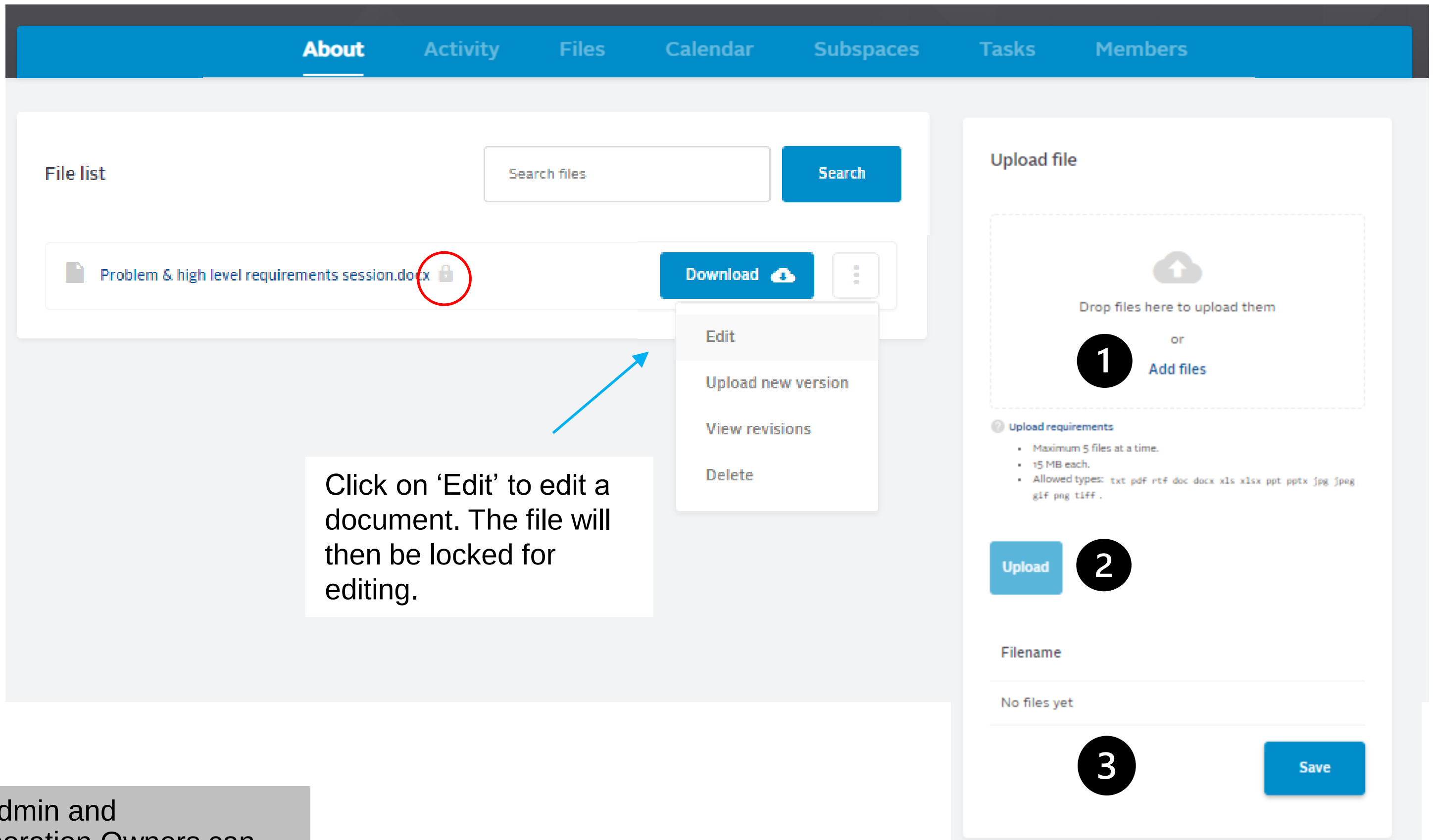
Collaborations of the 'Discussion' type do not have a Subspaces tab.

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



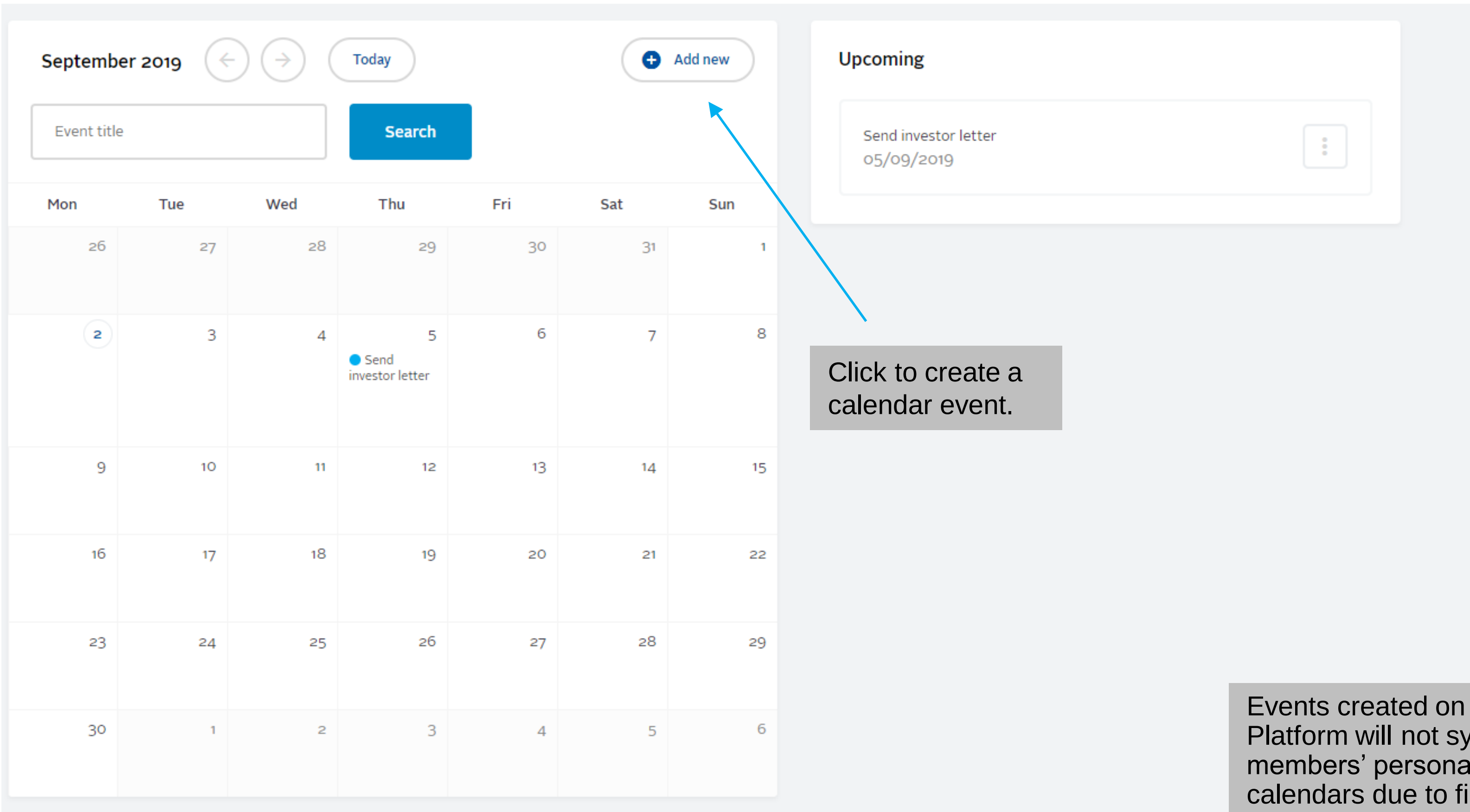

Click on ‘Edit’ to edit a document. The file will then be locked for editing.

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.

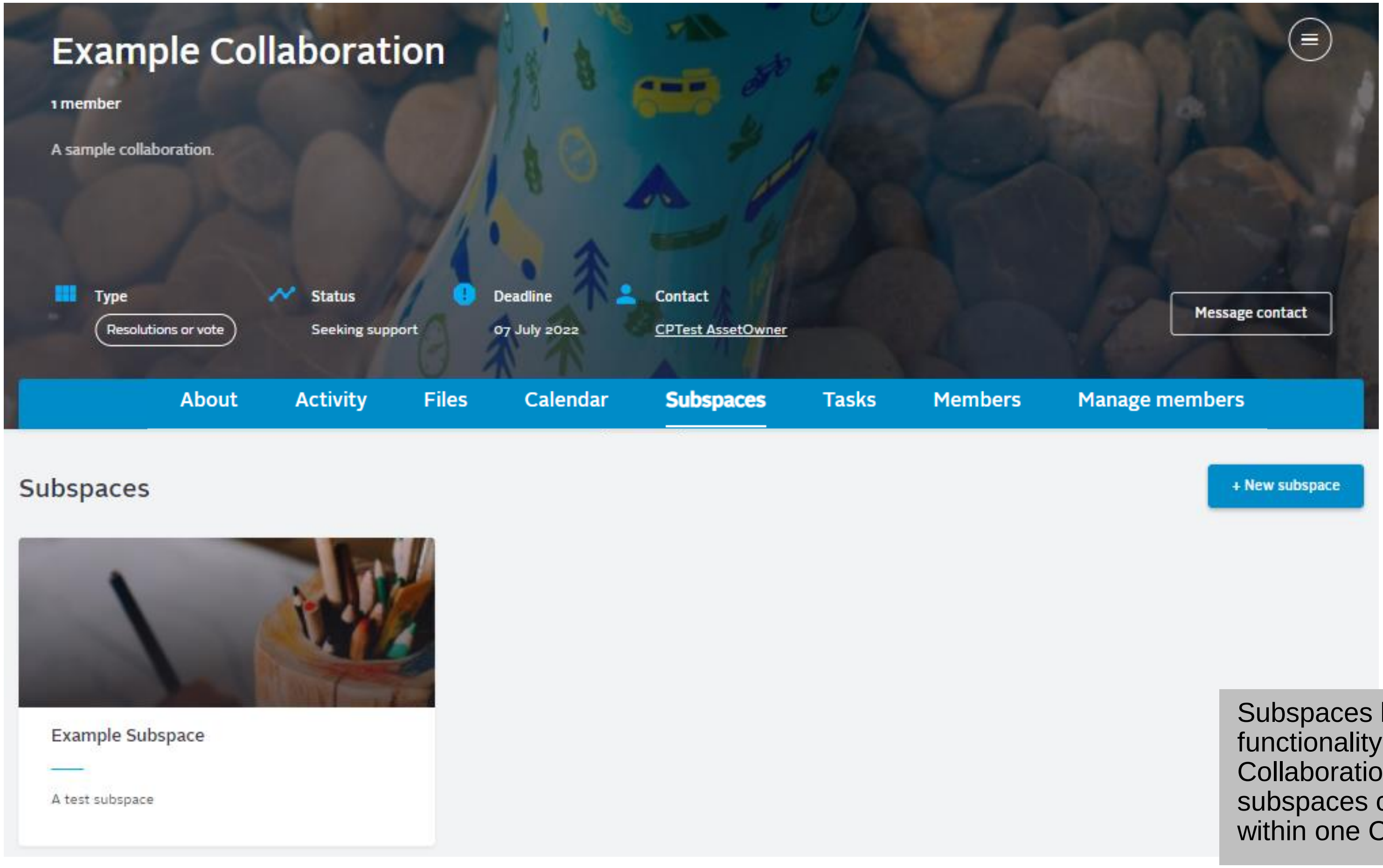



Click to create a calendar event.

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

# Individual Collaboration pages: Subspaces tab

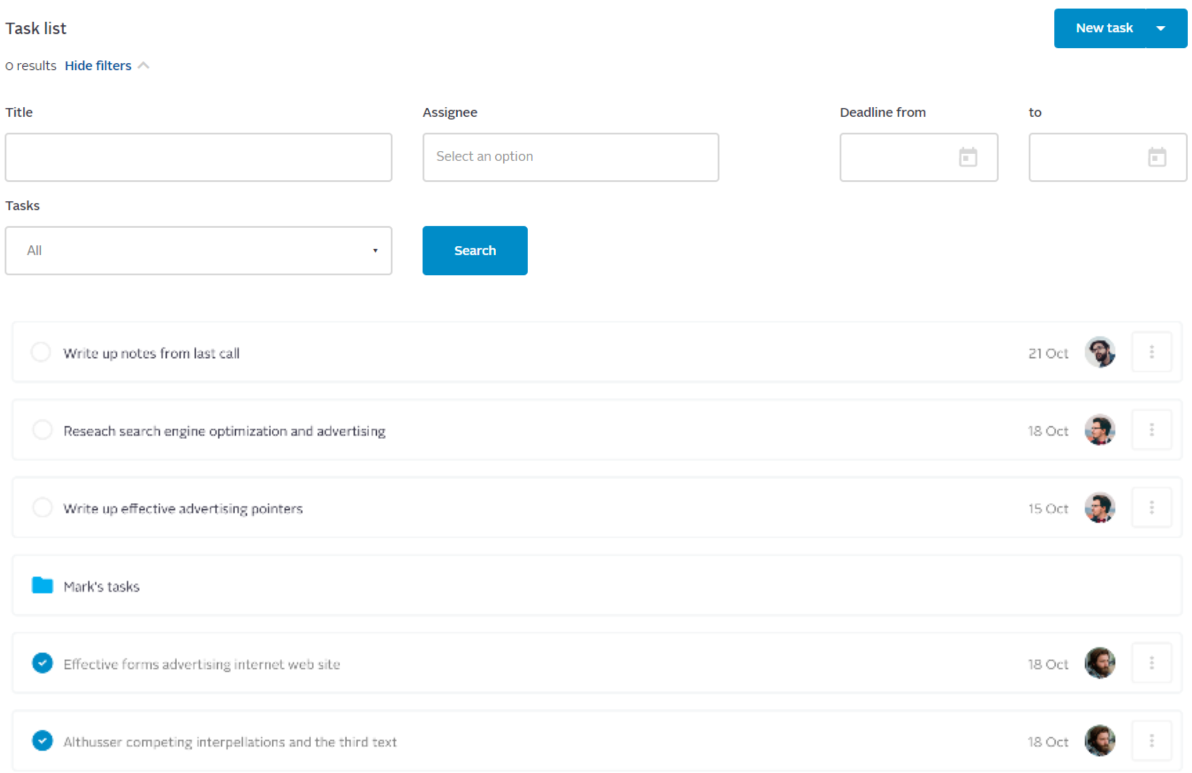
Collaboration owners can choose to create subspaces within their Collaborations, for example, for an advisory committee to use.




Subspaces have similar functionality to Collaborations. Multiple subspaces can be created within one Collaboration.

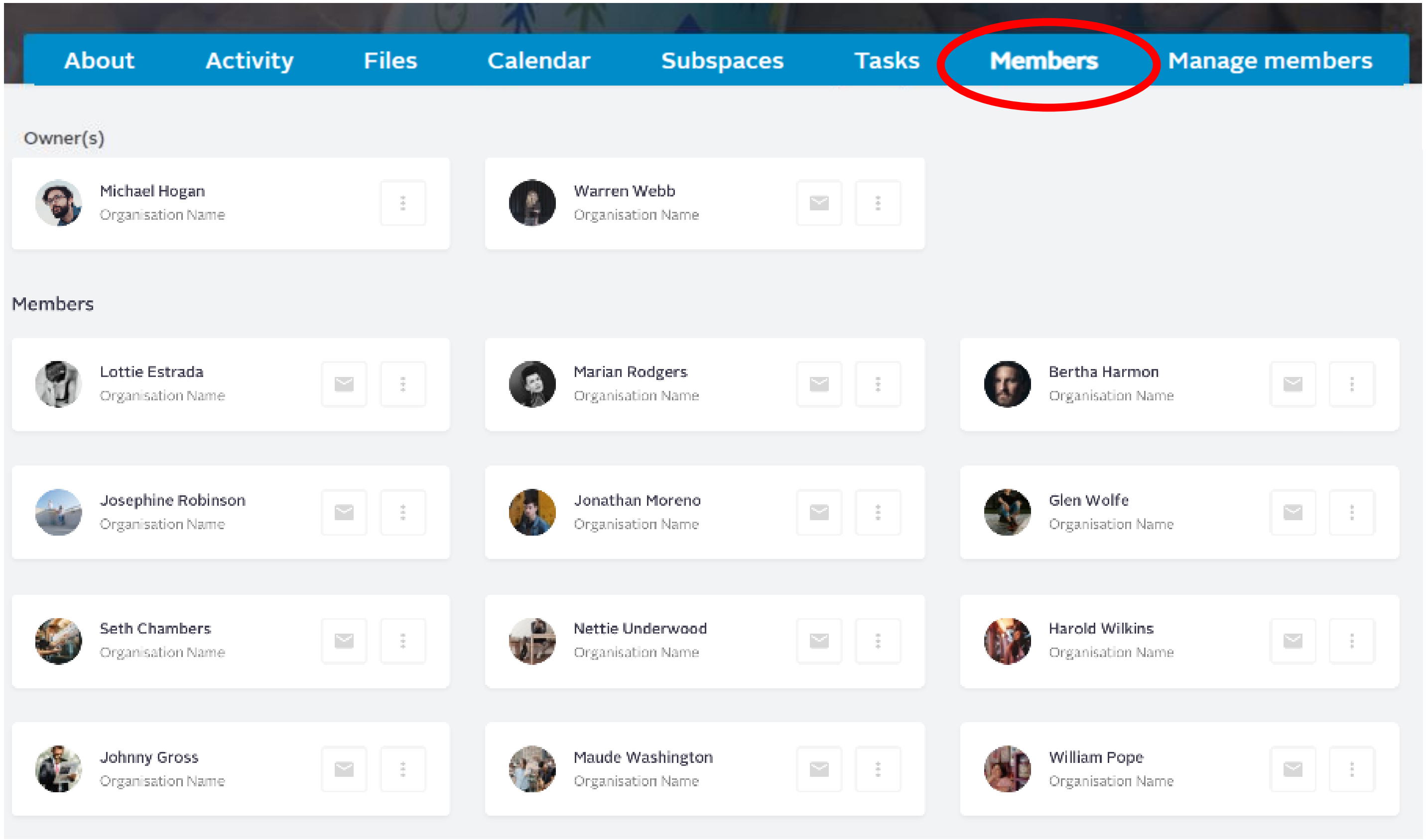
# Individual Collaboration pages: Tasks tab

Collaboration members can assign tasks to other members or themselves



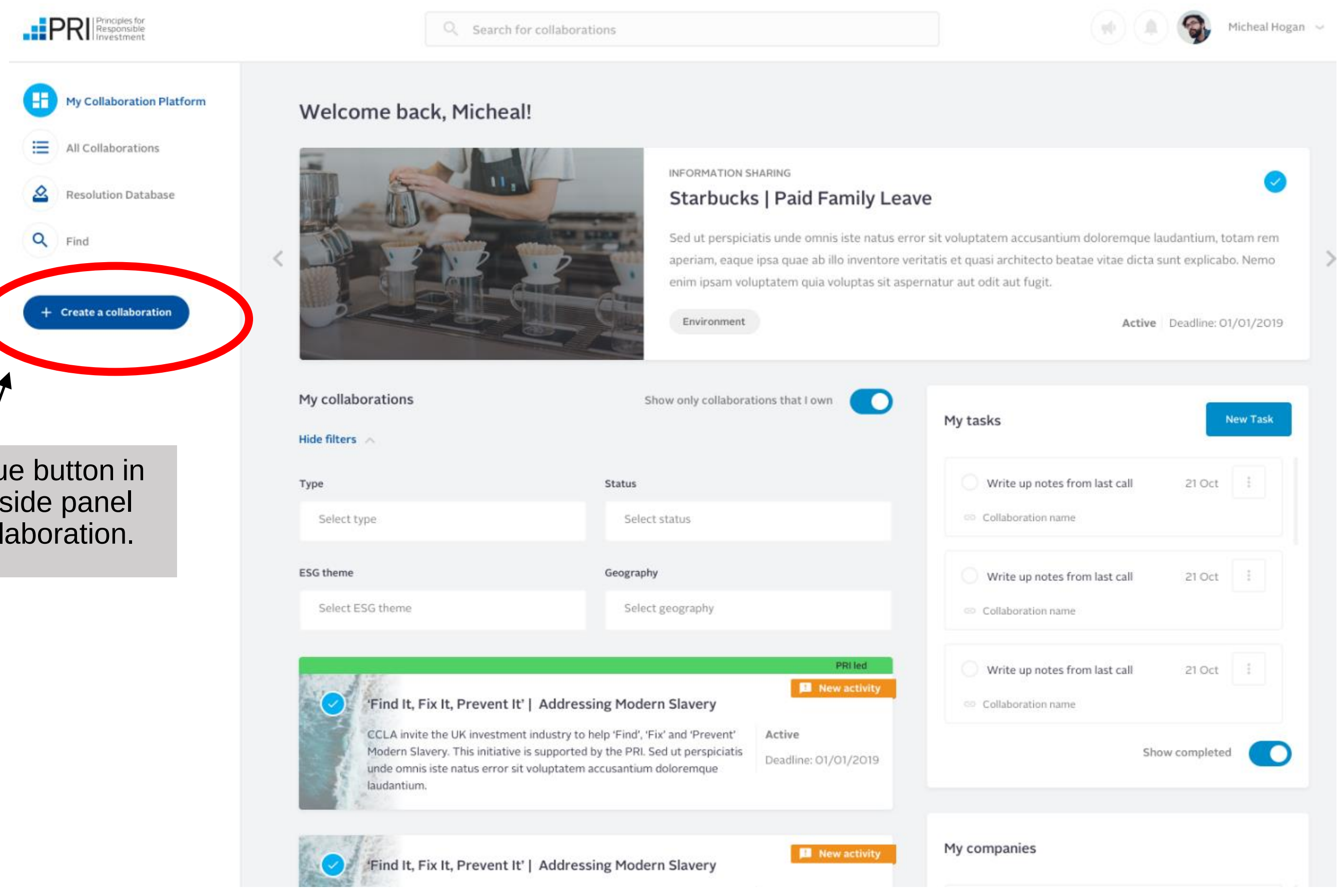
# Individual Collaboration pages: Members tab

Collaboration members are listed here.



# Creating a Collaboration

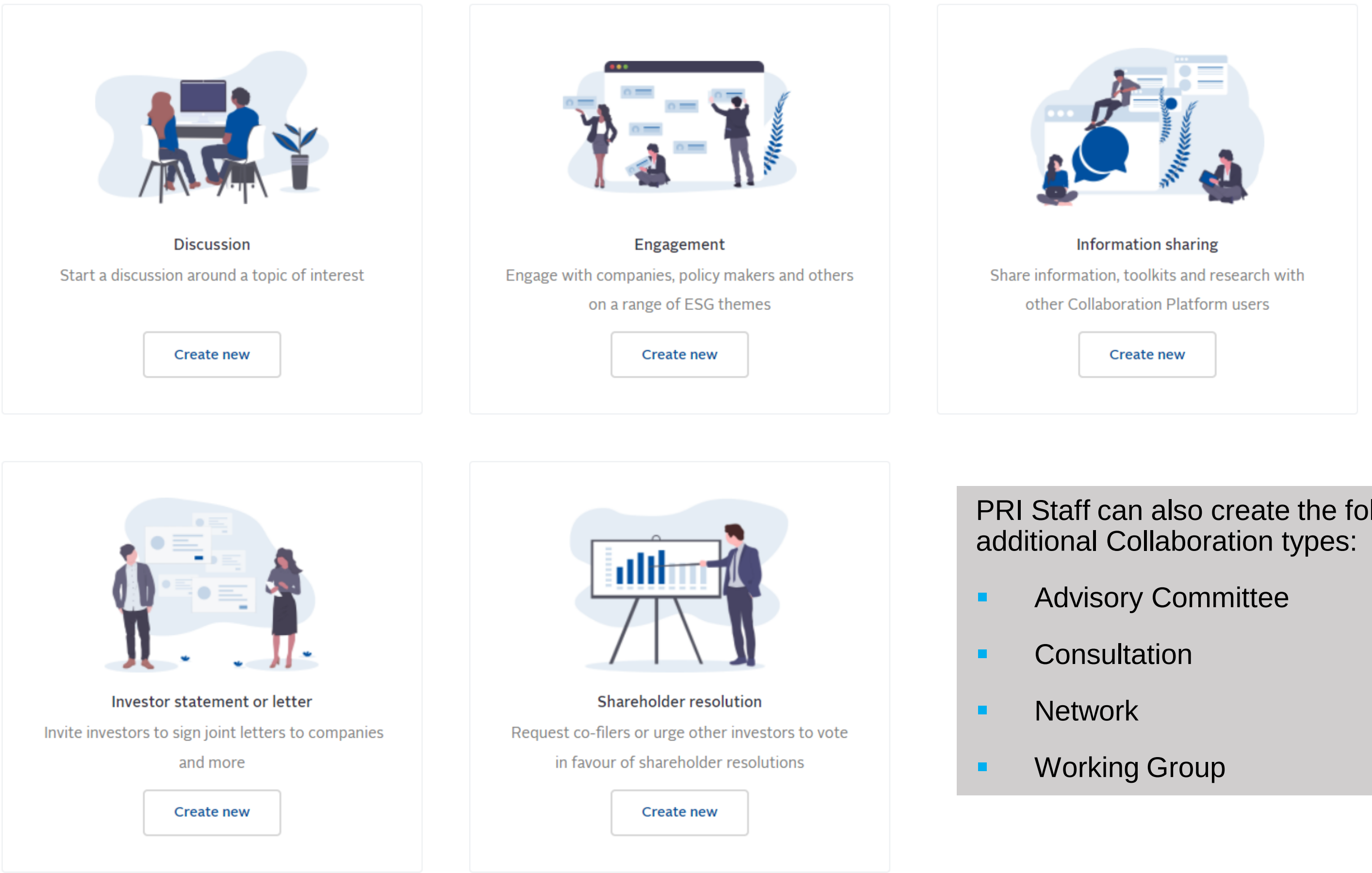
PRI Signatories and PRI's Network Supporters can create Collaborations. If you are a non-signatory stakeholder collaborating with PRI and wish to post a Collaboration, please contact collaborations@unpri.org.




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'.



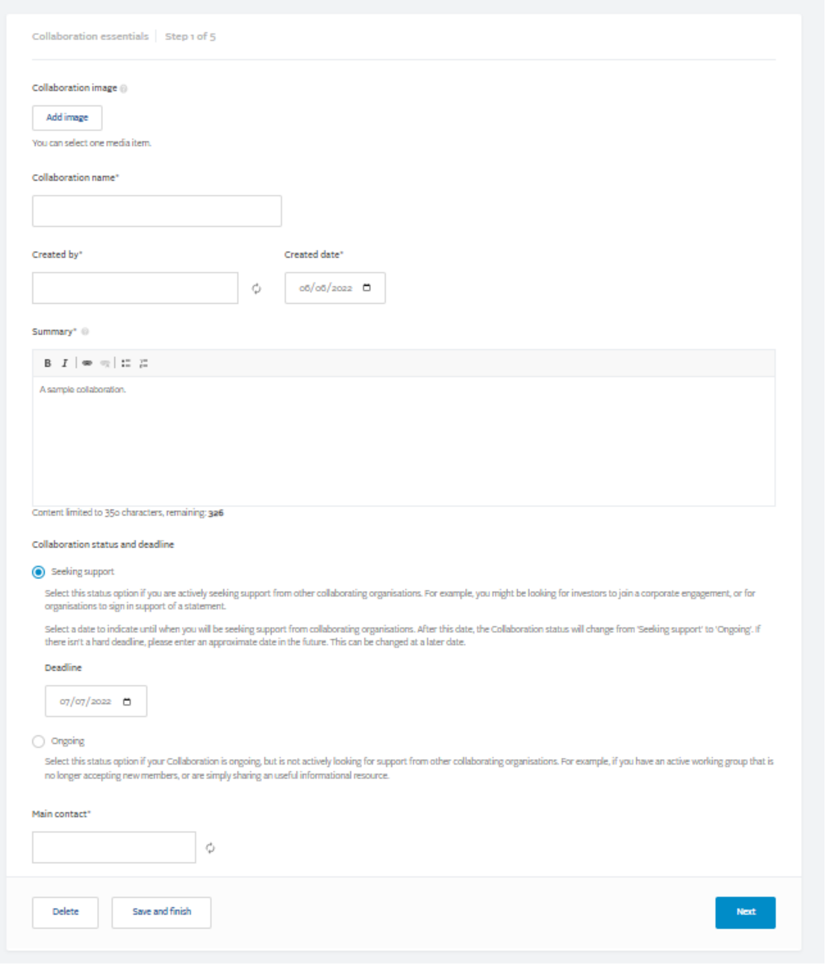

PRI Staff can also create the following additional Collaboration types:

- Advisory Committee
- Consultation
- Network
- Working Group

# Creating a Collaboration

In Step 1, you can add key information about your Collaboration. All information shared in this step will be displayed across the Collaboration Platform.

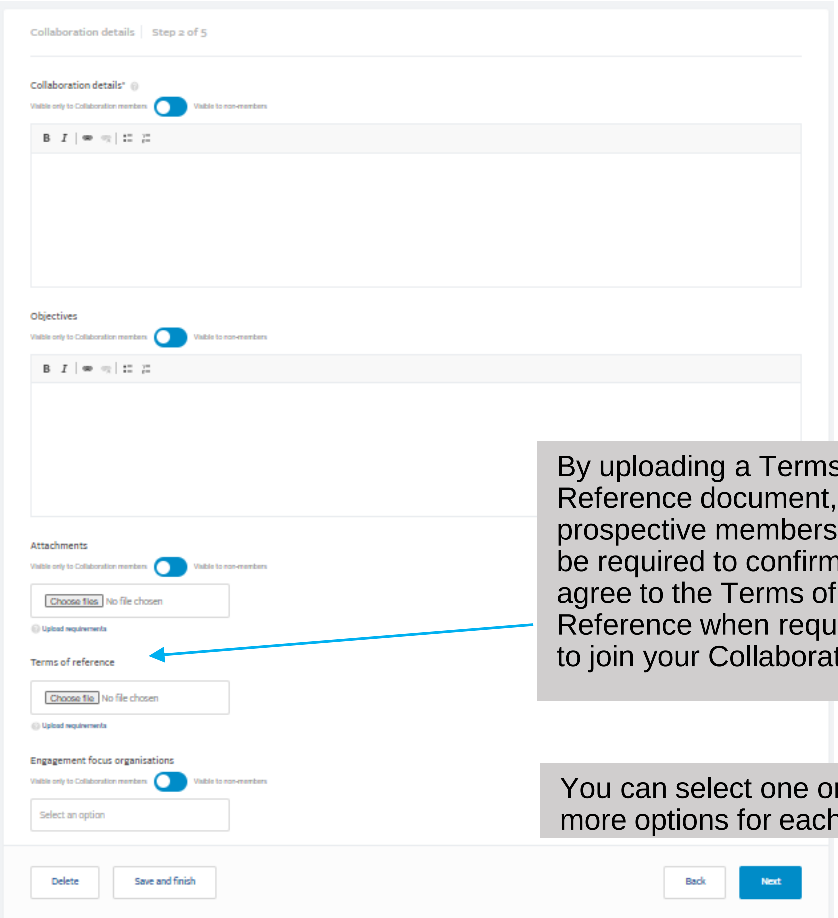
- **Collaboration image**
- **Collaboration name***
- **Created by***
- **Summary** – a short, one-line overview of the Collaboration
- Whether you are **actively seeking support** from collaborators, and until **what date**
- **Main contact* –** the contact added here will be the person to which messages are directed when users click ‘Message collaboration contact’, so please ensure your main contact has opted in to receiving messages in their Privacy settings.



# 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.




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.

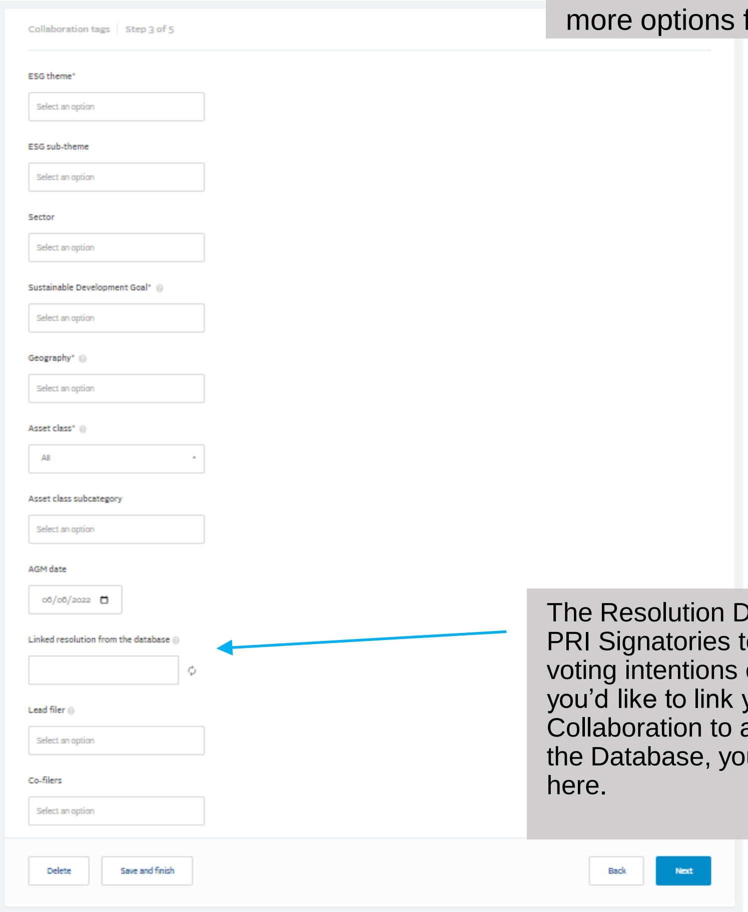
You can select one or more options for each field.

# 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.

You can select one or more options for each field.

- **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**

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

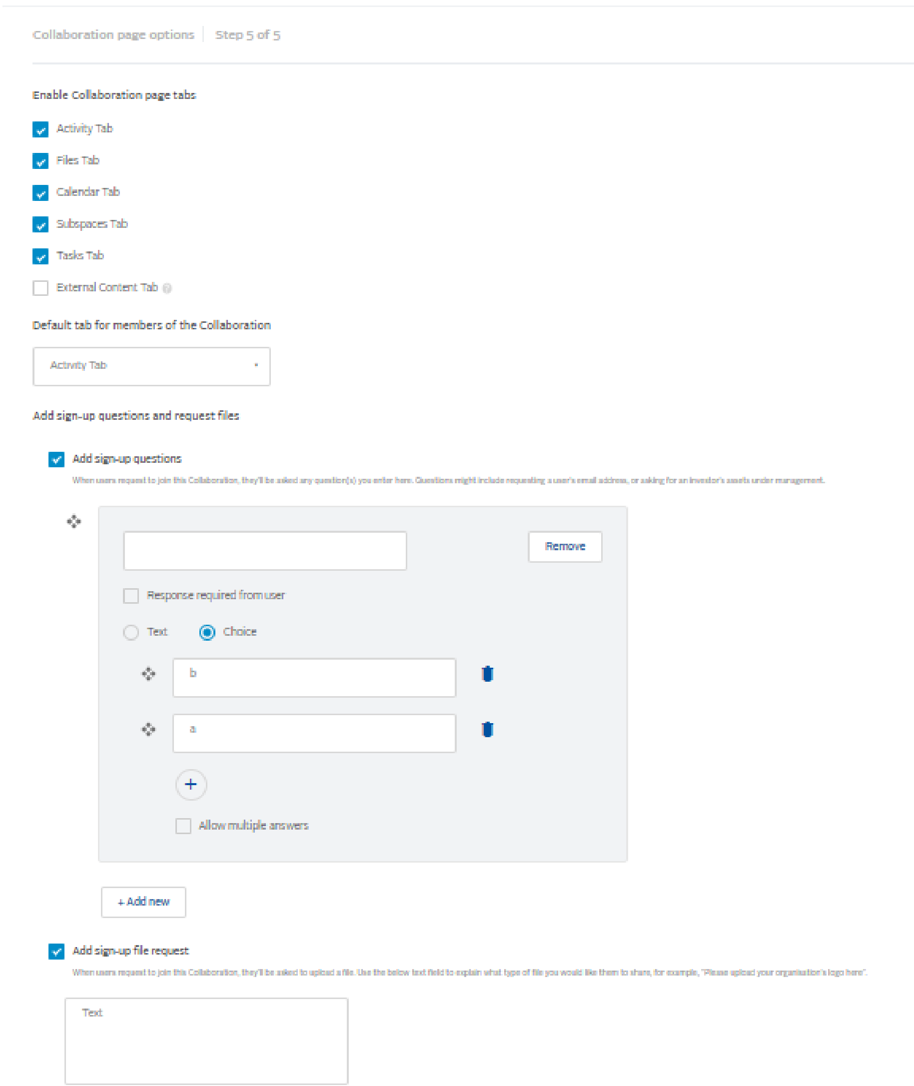
In Step 4, you can select your Collaboration's visibility.

- **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.

# 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.



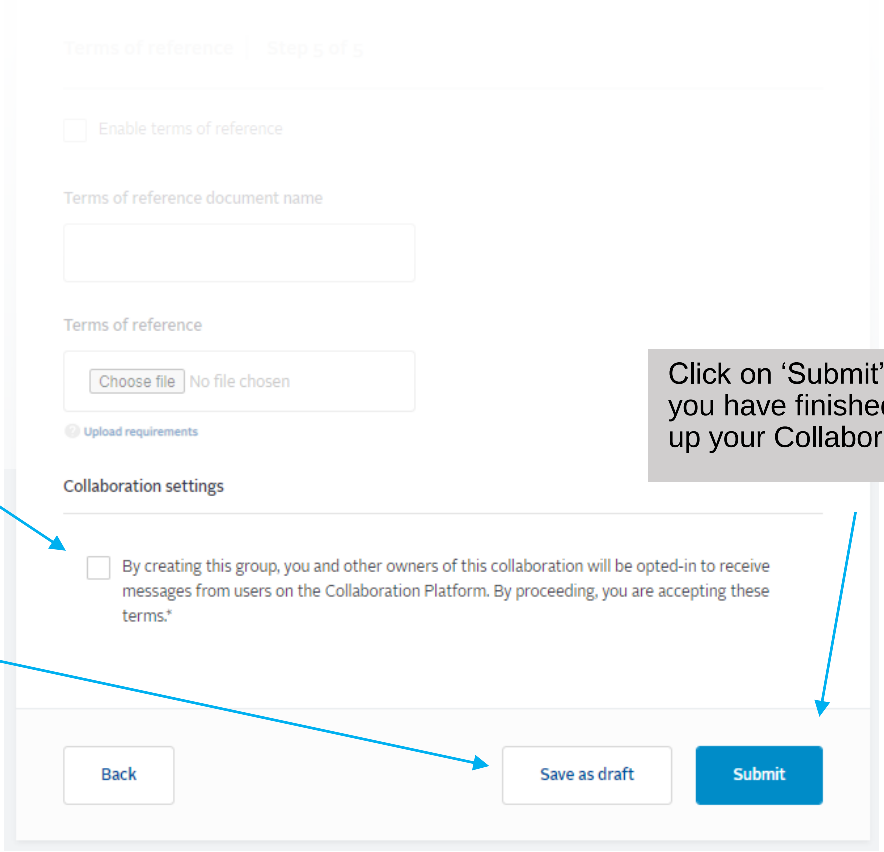
# Creating a Collaboration

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.

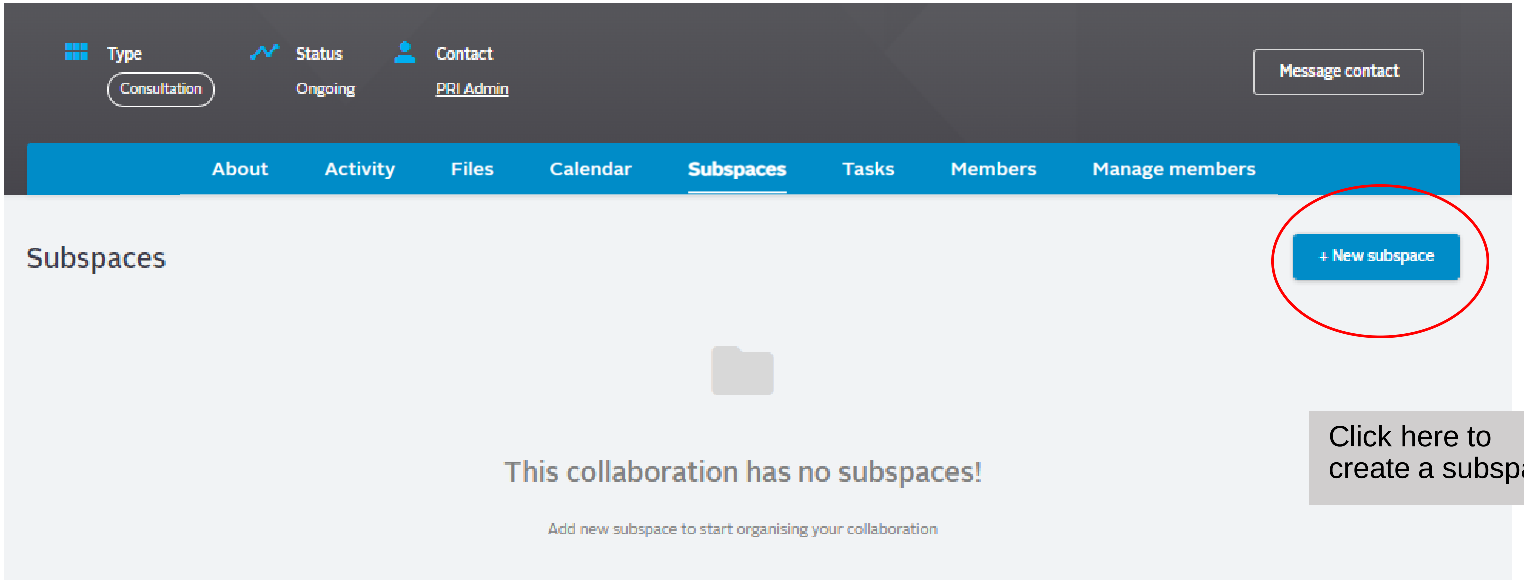
If you want to come back to your Collaboration and finish adding details later, click ‘Save as draft’.

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



# 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.

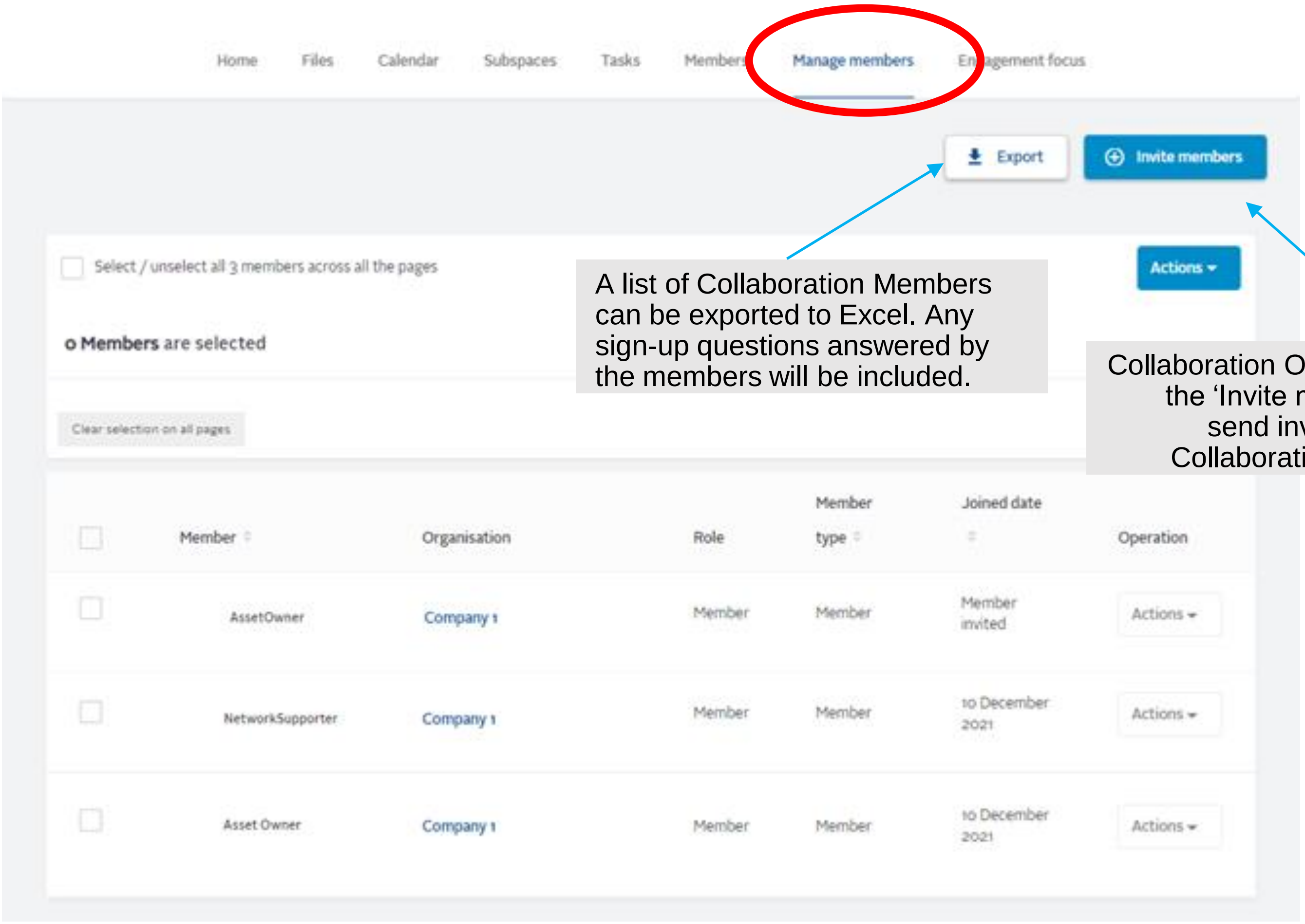



Click here to create a subspace.

- 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.

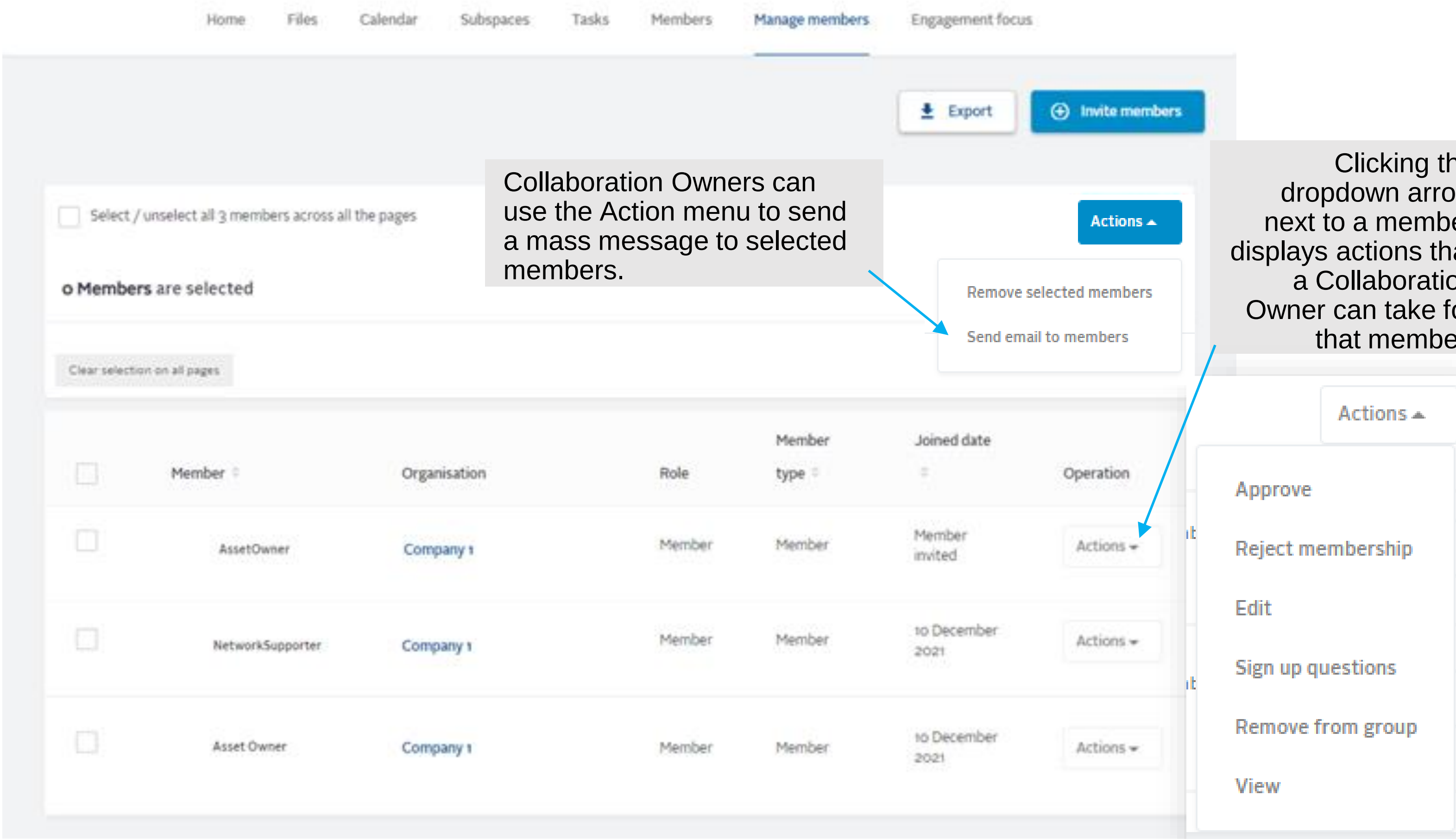



A list of Collaboration Members can be exported to Excel. Any sign-up questions answered by the members will be included.

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

# 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.

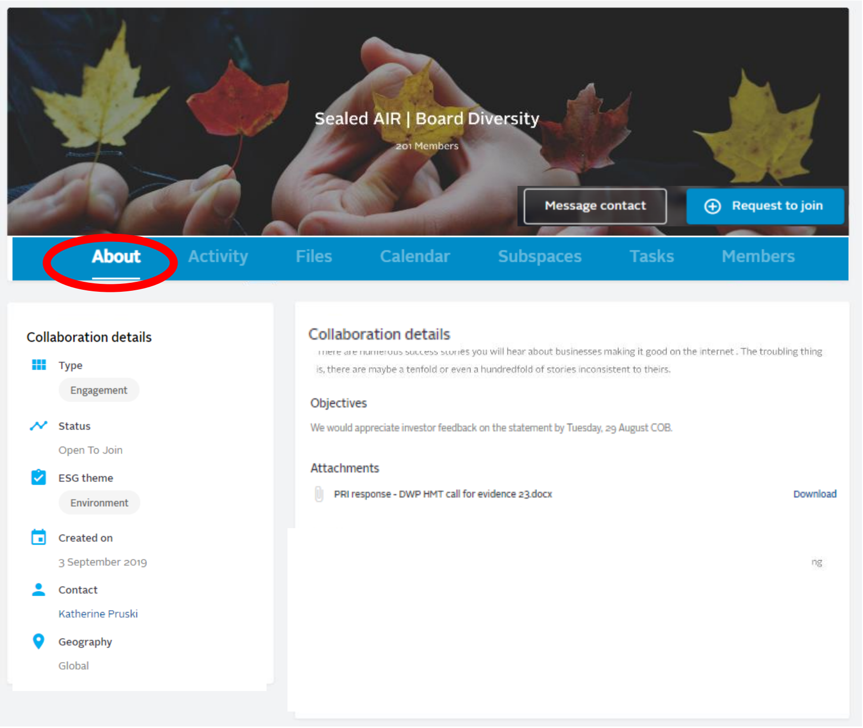



Collaboration Owners can use the Action menu to send a mass message to selected members.

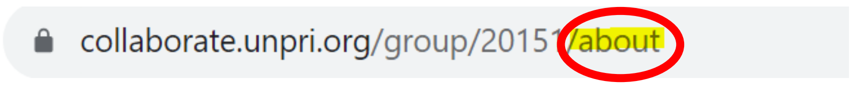
Clicking the dropdown arrow next to a member displays actions that a Collaboration Owner can take for that member.

# 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’.

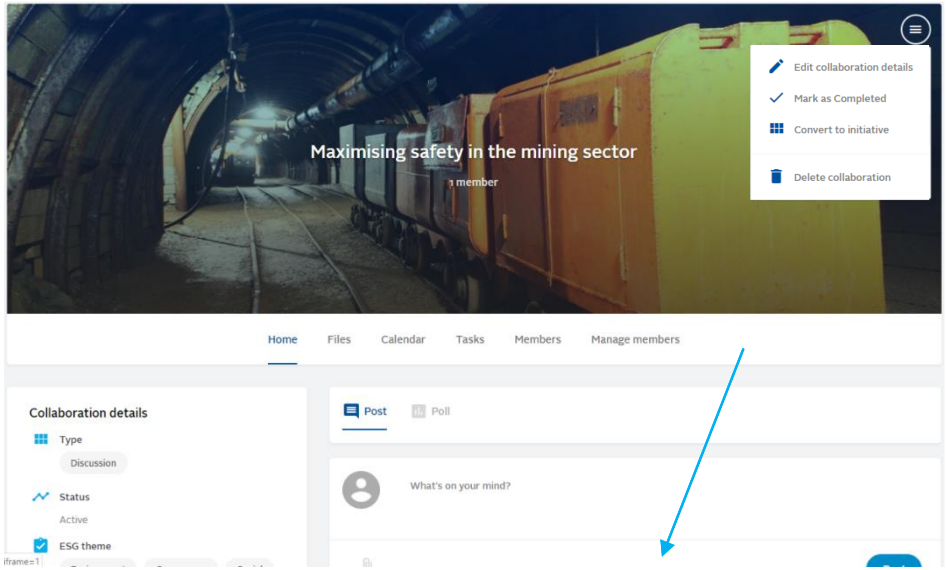



Copying and sharing the collaboration link from any other sections (Ex: Task, Calendar) will prevent non-members from accessing the collaboration

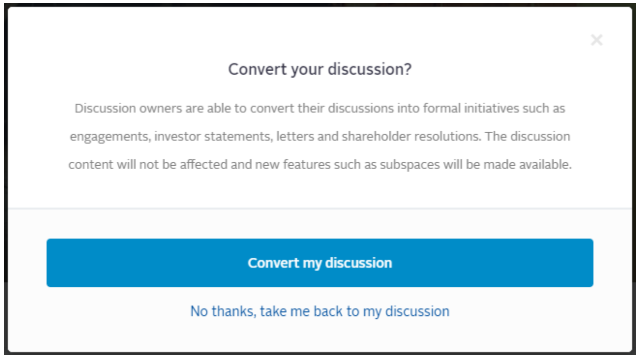


# Converting a discussion

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.



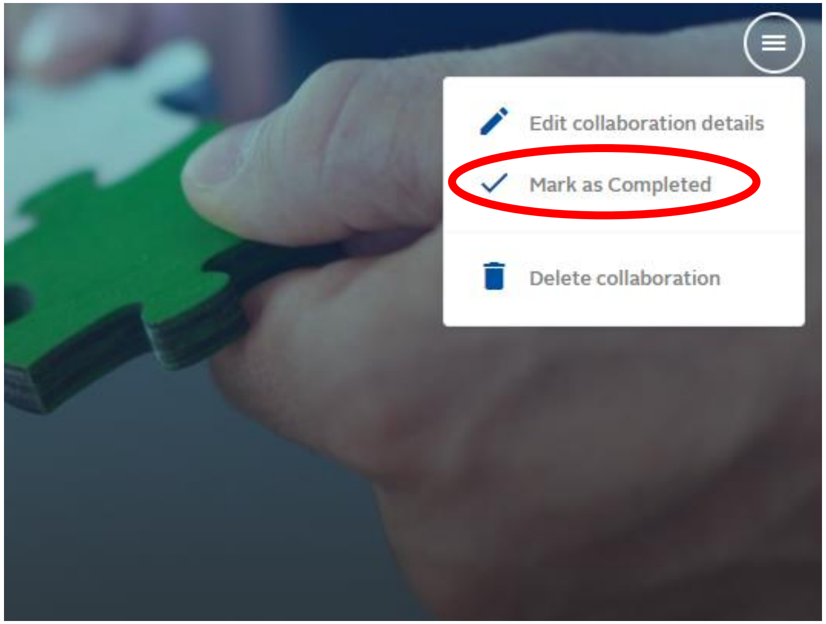

Click on the edit button on the top right-hand corner of your Collaboration and select 'Convert to initiative'




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.

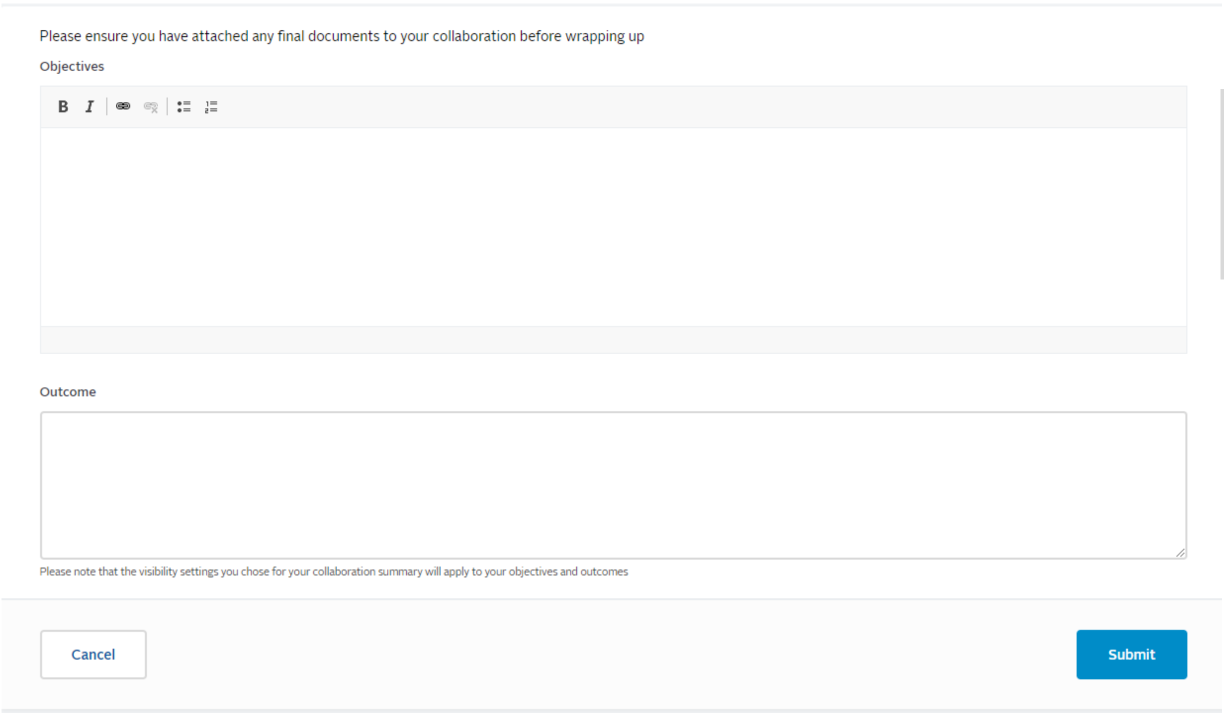



Click on the edit button on the top right-hand corner of your Collaboration and select '**Mark as Completed**'.

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.




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.