THE HELP GUIDE

FOUNDATIONS IN RESPONSIBLE INVESTMENT

TAKE 5 MINUTES NOW...

....to have a quick read through The Help Guide... before you start your training.

5 minutes will ensure that your experience with the PRI Academy’s web-based learning system is trouble-free and, most of all, enjoyable.

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1. INTRODUCTION TO THE PRI ACADEMY

1. Who we are and what we do?
The PRI Academy provides industry leading training for financial services, corporate and other professionals needing to understand how environmental, social and governance issues are impacting investment decision making.

2. How has the market responded?
The PRI Academy is now receiving global enrolments from asset owners, asset consultants, investment managers and specialist organisations such as the PRI and Bloomberg. Some examples of recent testimonials include:

- “The RI Academy is the gold standard and unique in the marketplace.” global asset manager
- “The RI Academy has an extremely important role to play in continuing to train global markets. We look forward to our continued collaboration” global service provider
- “The RI Academy is a particularly well put together course, and it is helping us better understand how we can integrate ESG issues into our investment frameworks.” prominent asset owner.

3. How is the training delivered?
The training provided is completely web-based – there are no live sessions, webinars or set times. You can start and finish when and where you please, as long as you have access to the internet. No travel, no pressure, no greenhouse gases!

4. How long is the course?
Foundations in RI comprises seven modules and typically takes between 12 - 14 hours to complete, depending upon the amount of time you wish to spend going through the extra resources provided.

5. How long do I have to complete the training?
Your licence period for Foundations in RI is for one year and commences the day you receive your login details. Should you need further time to complete the course, please contact Team Academy on enquiries@priacademy.org.

6. Is the course assessed?
There is an optional assessment that is rewarded with an official “Record of Completion” from the PRI Academy. The assessment comprises 60 multiple choice questions with a pass rate of 80%. You will be given the option to take the assessment once you complete all modules. Alternatively, you may simply use your curriculum as a toolbox to dip in and out of the areas that you wish to concentrate on (e.g. engagement, case studies, financial modeling, or “how to” guides).

7. Can I get in touch with someone from the PRI Academy?
You may send an email to one of the following addresses and we will respond at the first opportunity:

- For technical support: support@priacademy.org
- For general enquiries: enquiries@priacademy.org
2. THE PRI ACADEMY LEARNING PORTAL

- The PRI Academy Learning Portal is a web-based training system with a number of powerful features that make learning simple, effective and interesting.
- The course material is provided entirely online so that you learn at your own pace.
- You have one year to complete your chosen course and sit the assessment.

2.1. LOGGING INTO YOUR PERSONAL LEARNING PAGE

Each user is allocated a unique username and password. These are for your personal use only and are not to be passed on to others.

You can start your responsible investment learning journey by logging onto the PRI Academy website (www.priacademy.org) and clicking on the "Login" button in the menu bar. It would be a great idea to bookmark this link.

Enter the username and password sent to you recently in an email. If you need to locate this correspondence, simply search your inbox for an email from “Team Academy” or search for the word “enrolment” in the subject box.

We recommend that you change your password when you first login. For more information about how to change your password, please go to section 4.1.

2.2. USING YOUR PERSONAL LEARNING PAGE

Your personal learning page will appear once you have logged in with your unique user name and password. Your learning page displays the courses that you are registered for in the PRI Academy.

For instance, in the case below, the user is enrolled in the "Foundations in RI" course only. Your personal learning page will display the full list of modules that make up that course. In the case of Foundations in RI, there are seven modules listed.

Your personal learning page will also state that you are registered to undertake the assessment at the end of the course. This link is visible but not active until you complete all of the modules in your chosen course.
A. Managing material on your personal learning page

You can use the “collapse all” option to easily monitor your progress through the course modules. There are two options to choose from:

❖ ALL MATERIAL
This will display all the modules in the course, whether you have completed them or they are in progress.

❖ MATERIAL IN PROGRESS
This option will hide all of the modules that you have completed to date.

B. Your course

On your personal learning page you will see the complete list of courses you are enrolled in and the modules within those courses. You can begin any module at any time, however we do recommend that you work your way through the modules chronologically. This will allow you (and the PRI Academy learning system) to keep track of your progress.
C. Your modules

Each module includes the following:

1. A web-based, interactive lesson.
2. A “RESOURCES” button which contains extra reading material that you may download to your computer.
3. A Reading Guide which helps you to navigate the extra reading material. The Reading Guide also provides guidance about the link between the interactive module and the extra reading material.
4. A printable copy of the web-based interactive lesson in case you would like to study away from your computer.

To begin, click on the “RI101 – An Introduction to Responsible Investment” link and the following screen will appear. You can then “Click to launch the interactive module”.

D. Your assessment

You will not be able to access the “Assessment” option until you have completed all seven modules of the course. When you have completed all modules, the “Assessment” button will become active and this will enable you to proceed to the assessment page.

For further information on the optional assessment, please see section 3 of this guide.
3. WORKING WITHIN EACH MODULE

When you first launch a module you will be taken directly to that module’s home page (below left).

If you wish to leave the module half way through, don’t worry, simply click on the “EXIT” button in the top right corner of the screen. When you log in again, the portal will ask you whether you would like to continue from where you left off, or begin again from the home page (below right).

3.1. SCREEN VIEW

If you are unable to see the complete screen of the newly opened window (for instance, part of the menu and the bottom part of the screen is cut off, as in the image opposite) there could be two reasons for this:

❖ You may need to adjust the “zoom” setting on your browser.
   You may need to change your screen resolution.

Please follow the steps on the following page to resolve this issue.

A. Browser zoom option

Changing zoom options differs from browser to browser. In this guide we will show you how to resolve this issue in commonly used browsers.

Before following the steps below, please begin by closing the module you are in (click on the “EXIT” button). Now open the PRI Academy website (www.priacademy.org).
FOR GOOGLE CHROME USERS

Please click the settings button which looks like a “wrench tool” on the top right corner of the screen.

1. Reduce the zoom by clicking the “-” button beside the “Zoom” option.
2. Login to the PRI Academy Learning Portal again and see if the problem has been resolved.
3. Repeat step 1 and 2 until you see the complete screen.

Note: the shortcut key for zoom in most browsers is:
Zoom in: Ctrl and +
Zoom out: Ctrl and –
Zooming to set on 100%: Ctrl and 0
❖ FOR INTERNET EXPLORER AND MOZILLA FIREFOX USERS

Select the “View” menu from the tool bar and select “Zoom”, then select the “Zoom Out” option. Please repeat this step until you see the complete screen of the module.
B. Screen resolution

If you have tried the zoom function and are still unable to see the complete screen of the module, you will need to adjust your screen resolution. Before you do, please change the zoom of your browser back to 100% by pressing the Ctrl + 0 key and then exit the module.

❖ SCREEN RESOLUTION FOR WINDOWS XP USERS

Right click on the desktop and select “Properties”. Select the “Settings” tab on the top menu and increase the “Screen resolution” by moving the slider to the right. You will need to try different resolution settings in order to achieve the best result. We recommend that in your first attempt you adjust the setting to the maximum available resolution.

❖ SCREEN RESOLUTION FOR WINDOWS VISTA AND WINDOWS 7 USERS

Right click on the desktop and select “Screen resolution”.

Then follow these 3 steps:

Step 1: Click on the drop down arrow in the “Resolution” field and move the slider up to the maximum available resolution.

Step 2: Press OK

Step 3: Open your browser and, go to www.priacademy.org, log into your lesson, and you should now be able to view everything perfectly.

Note: By performing the above steps, the icons on your desktop will look a bit smaller. If you are not comfortable with this new setting for your day to day computer work, please change the resolution back by resetting the slider to its previous position.
3.2. MODULE FUNCTIONALITIES

This is the title of the module you are currently completing.

Click here to return to the home page of the module.

Click to see HELP.

Click on the RESOURCES button to access this module’s Reading Guide, extra reading material, and a printable copy of the module.

Scroll bar.

Go to the next page.

Go to the previous page.
3.3. MODULE COMPLETION

In order to complete a module, you will need to view all of the screens within each topic. The topics are displayed on the right hand side of the module “HOME” screen (see below). As you complete each topic within a module, an orange tick will appear. When you complete all topics within the module, a green tick will appear next to that module on your personal learning page.

If you have completed a module, and no green tick has appeared on your personal learning page, please follow the steps below.

Click on the module link on your personal learning page. Once the module is loaded, click on the “HOME” button in the top right hand corner of the screen.

Make sure all of the topics on the right hand side have orange tick marks next to them (as shown in the screenshot above). If any of the topics do not have the orange tick, you may have missed some screens in that topic. We recommend that you click through the topic using the “NEXT” button, after which the orange tick should appear.

If the problem persists we recommend you use a different browser (for instance, switch to Google Chrome or Mozilla Firefox if you are using Internet Explorer) and repeat the process.
On completion of all topics in the module you will return to the module’s home page. From there, click the “EXIT” button in the top right corner of the screen and you will be directed back to your personal learning page where you can move on to the next module.

If you exit a module, you will be returned to the page below. To reach your personal learning page, click the ‘RI Modules’ option, as indicated below.

As you complete each module, a green tick box will appear to indicate your progress:

Click "RI Modules" to go back to your personal learning page.
Note: The “Assessment” link will be visible but inactive - unless you have green “tick” signs next to all of the modules in your course.
4. ASSESSMENT

The final component of the course is an online assessment. The “Assessment” link will be visible but not active until you complete your course and click through to the end of all modules.

Only the material contained in the web-based interactive modules is assessed. The extra reading material in the Resources section of each module is optional and is not included in the assessment.

The assessment is conducted completely online and comprises 60 multiple choice questions. You will have exactly two hours to complete the assessment (an average of two minutes per question) and this must be done in one sitting. The assessment will close down after two hours and you will be unable to revisit the page.

The assessment is optional. Should you choose to take the assessment, you are required to achieve 80% or greater to pass the course and receive your Record of Completion. If you do not achieve a passing grade for the assessment the first time round, you are entitled to retake the assessment.

4.1. BEGINNING THE ASSESSMENT

To begin the assessment, click on the “Assessment” link at the bottom of the module list (see below).
Once you have completed your modules, and clicked the “Assessment” link, you will be taken to the following screen:

Note: Please do not choose the “Proceed to Test” option if you have not prepared to sit the exam.
4.2. **ASSESSMENT COMPLETION**

Following your assessment you will be able to view your result on a new screen. All successful candidates will receive a “Record of Completion” from the PRI Academy.

Alternatively, if you do not achieve 80% or higher, you will receive an email letting you know that you may retake the assessment.
5. USER ACCOUNT

To access your account, please click on your name on the top right corner of your personal learning page, and select "Account" as shown below. From here you can update your details including your name, password, language, time zone and picture.

5.1. CHANGE YOUR PASSWORD

To change your password, simply enter a new password in the password field and click on the submit button.
6. FAQs

1. Do I have to contact the Academy to organise my assessment?

   No. The “Assessment” link is visible but not active until you have completed all of the modules in your course. Once you have completed your modules, the “Assessment” link will become active and you may proceed to the assessment page. Please see section 3, Assessment, for details.

2. I cannot see the entire screen

   If you are unable to see the entire screen or you cannot see the “NEXT” and “BACK” buttons, please do one or both of the following:

   Adjust the zoom option in your browser by pressing “Ctrl and –” key (please see section 2.1.A for more details, along with detailed screenshots).

   OR

   Increase the resolution of your screen (please see section 2.1.B for more details, along with detailed screenshots).

3. I have completed a module but there are no green ticks on the landing page

   In order to receive a green tick next to completed modules on your personal learning page, you will need to ensure that you have viewed all of the screens in the module, and clicked right to the end.

   If you have completed a module, and no green tick has appeared, select the module and click on the “HOME” button in the top right hand corner of the screen.

   Make sure all of the topics on the right hand side have orange tick marks next to them. If any of the topics do not have the orange tick, you may have missed some screens in that topic. We recommend that you click through the topic using the “NEXT” button, after which the orange tick should appear.

   If the problem persists we recommend you use a different browser (for instance, switch to Google Chrome or Mozilla Firefox if you are using Internet Explorer) and repeat the above process (please see section 2.3 for more details, along with the detailed screenshots).

4. The modules are taking a long time to load

   The speed at which a module loads is dependent on the speed of your internet connection. For optimal ease in loading modules, you will need to be connected to high speed internet.

   If you have a high speed connection and loading problems persist, the most common solution is to restart your computer.

5. For unknown technical difficulties

   Please close the browser, restart your computer and log in again. Many of these problems will be resolved by restarting your computer.

   If the problem persists please use a different browser. We recommend Mozilla Firefox and Google Chrome for best performance.
7. CONTACT DETAILS

If you have any further queries or technical issues that you would like help with please feel free to contact us.

- For technical support: support@priacademy.org
- For general enquiries: enquiries@priacademy.org