

THE HELP GUIDE

GETTING STARTED IN RI

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 RI 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?

Getting Started in RI comprises eight topics and typically takes between 2 - 3 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 license period for Getting Started in RI is for six months and commences the day you receive your login details. Should you need further time to complete the course, please contact the RI Academy, priacademy@unpri.org.

6. Is the course assessed?

Yes. Once all modules are completed there is a short 14 question multiple-choice assessment. Students are required to complete the assessment in order to receive their official ‘Record of Completion’ from the PRI Academy.

7. Can I get in touch with someone from the PRI Academy?

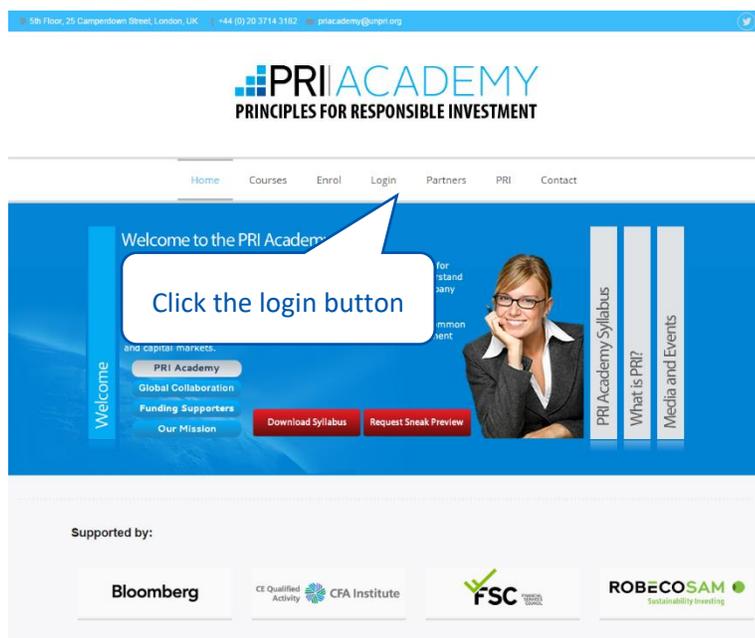
You may send an email to one of the following addresses and we will respond at the first opportunity:

- ❖ For general or support enquiries: priacademy@unpri.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 access to the course content and additional materials for six months.

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 \(www.priacademy.org\)](http://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.

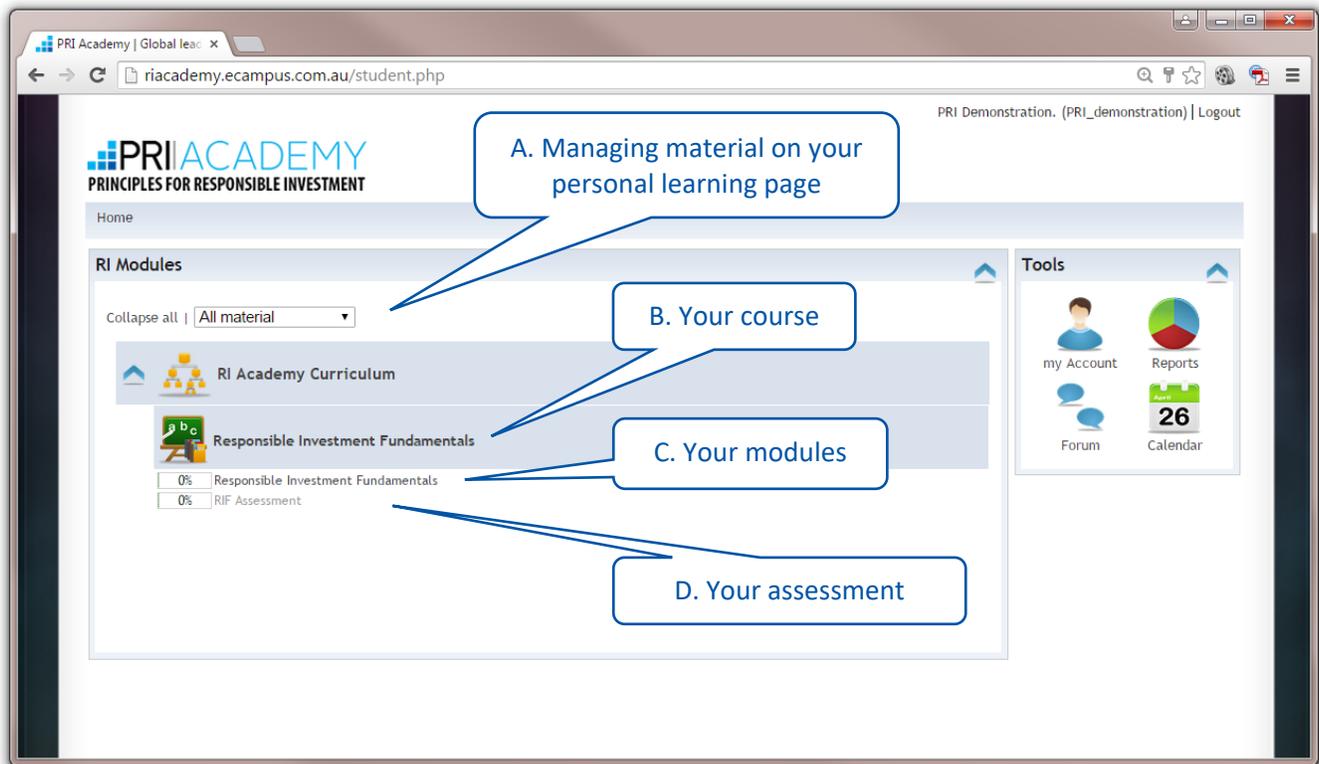
We recommend that you change your password when you first login. For more information about how to change your password, please go to section 4.1.

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 "Getting Started in RI" course only. Your personal learning page will display the module and the assessment that make up that course.

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 the module 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

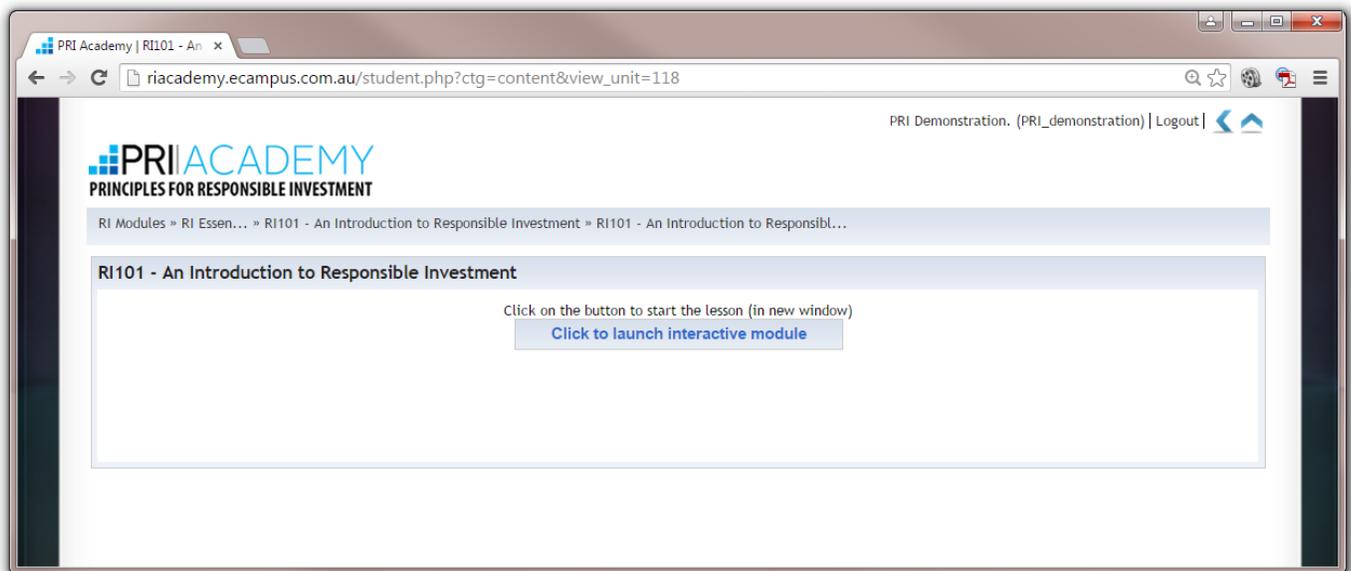
On your personal learning page you will see the complete list of courses you are enrolled in and the modules within those courses. You can begin any module at any time, however we do recommend that you work your way through the modules chronologically. This will allow you (and the PRI Academy learning 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 module link and the following screen will appear. You can then “Click to launch the interactive module”.



D. Your assessment

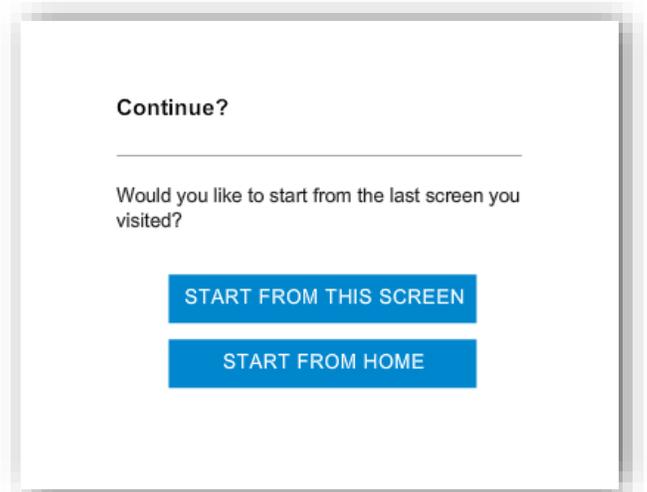
You will not be able to access the “Assessment” option until you have completed the module of the course. When you have completed the module, the “Assessment” button will become active and this will enable you to proceed to the assessment page.

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.

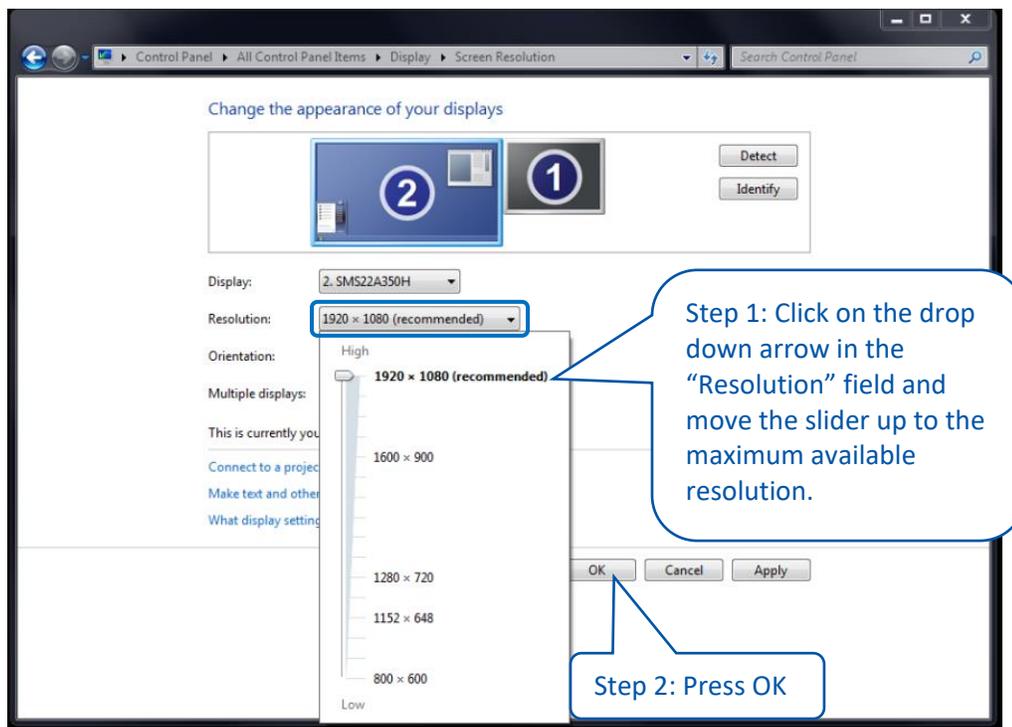
❖ SCREEN RESOLUTION FOR WINDOWS XP USERS

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 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.

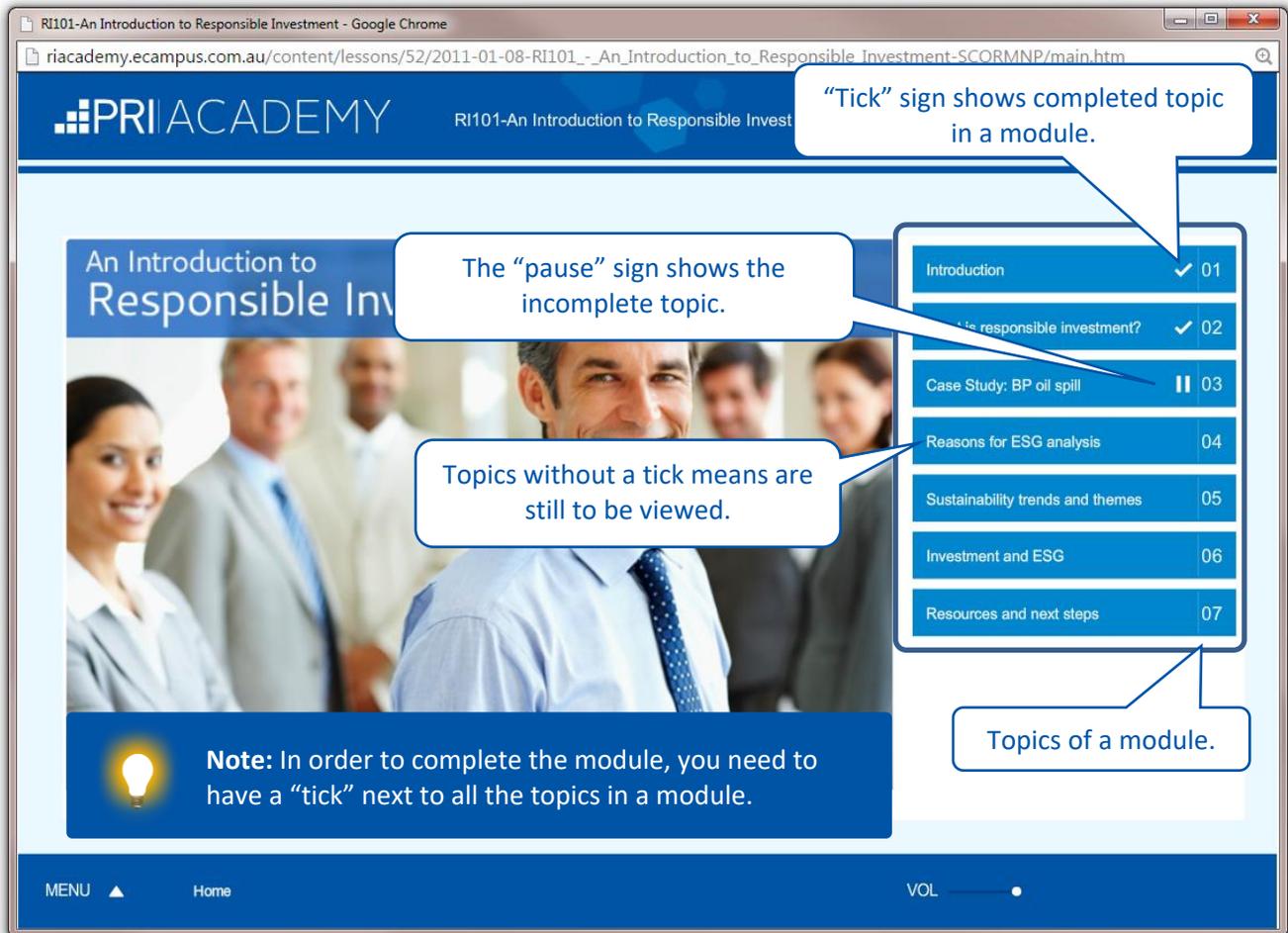
Go to the next page.

Go to the previous page.

The screenshot shows a web browser window displaying the PRI Academy module page. The browser address bar shows the URL: `riacademy.ecampus.com.au/content/lessons/52/2014-01-08-RI101_-_An_Introduction_to_Responsible_Investment-SCORMNP/main.htm`. The page header includes the PRI ACADEMY logo, the module title "RI101-An Introduction to Responsible Investment", and navigation buttons for HOME, RESOURCES, HELP, and EXIT. The main content area is titled "Defining sustainability" and contains a "Sustainability" section with text and a scroll bar. To the right of the text are three expandable menu items: "Environmental sustainability", "Social sustainability", and "Economic sustainability". Below the text is a list item: "Click each button to find out more. Then click the 'Next' button to continue." At the bottom of the page, there is a footer with a MENU button, a page indicator "Sustainability trends and themes / Page 2 of 7", a volume control button, and BACK and NEXT navigation buttons.

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.



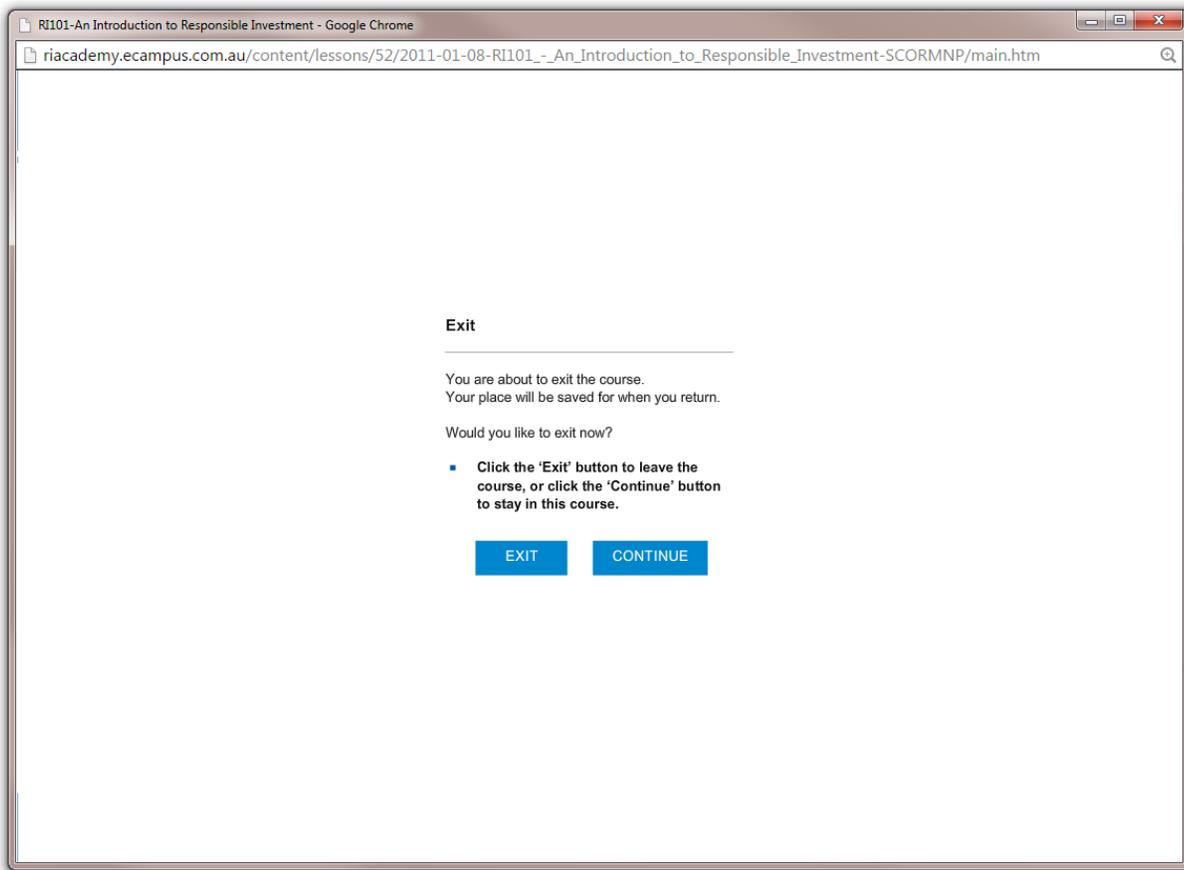
If you have completed a module, and no green tick has appeared on your personal learning page, please follow the steps below.

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.

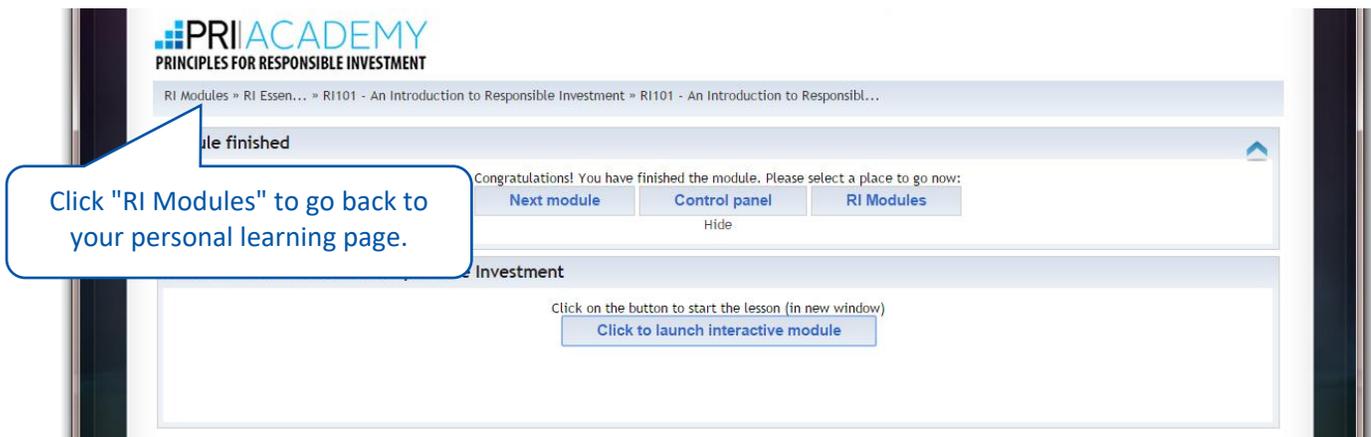
Make sure all of the topics on the right hand side have orange tick marks next to them (as shown in the screenshot above). If any of the topics do not have the orange tick, you may have missed some screens in that topic. We recommend that you click through the topic using the “NEXT” button, after which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

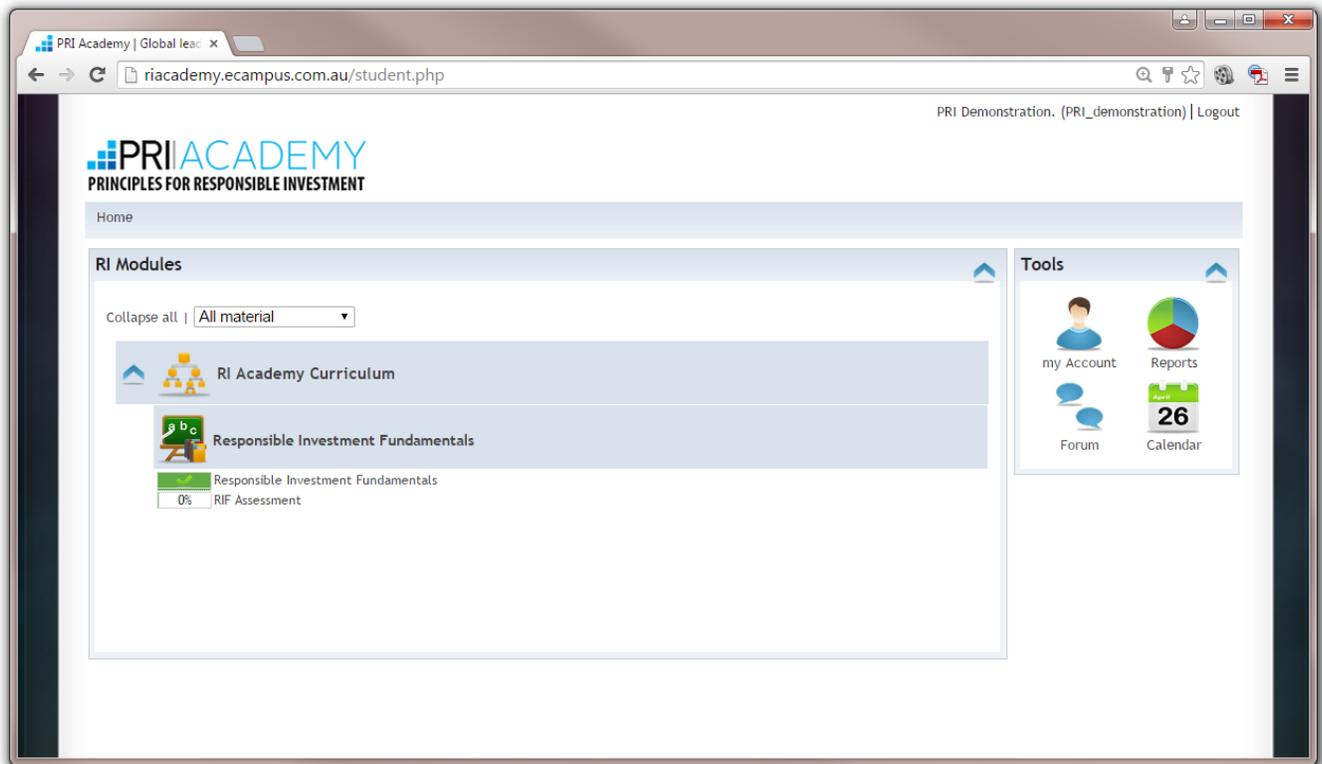
On completion of all topics in the module you will return to the module's home page. From there, click the "EXIT" button in the top right corner of the screen and you will be directed back to your personal learning page where you can move on to the next module.



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 the module, a green tick box will appear to indicate your progress:



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.

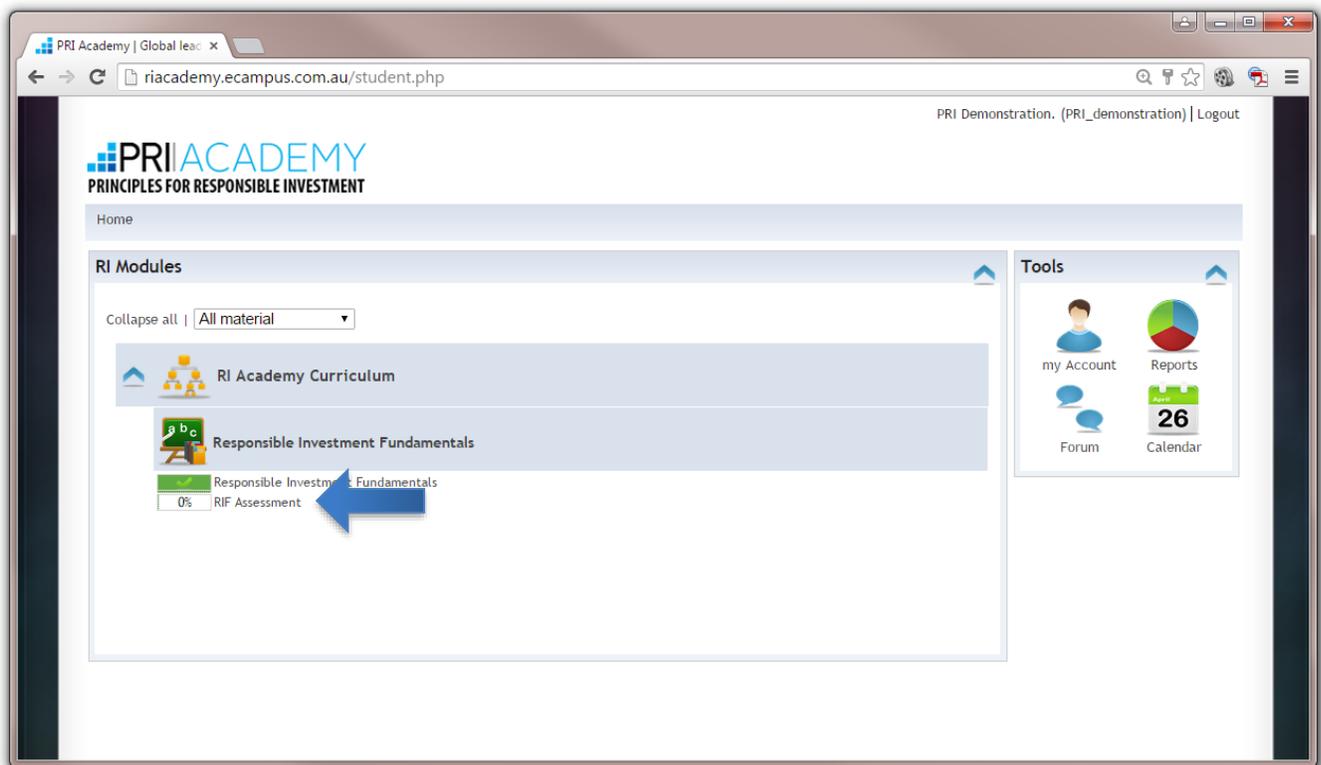
Only the material contained in the web-based interactive modules is assessed. The extra reading material in the Resources section of each module is optional and is not included in the assessment.

The assessment is conducted completely online and comprises 14 multiple choice questions. You will have 30 minutes to complete the assessment and this must be done in one sitting. The assessment will close down after 30 minutes 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 60% 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 “RIF 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:

The screenshot shows a web browser window with the URL `riacademy.ecampus.com.au/student.php?ctg=content&view_unit=180`. The page header includes the PRI Academy logo and the text 'PRINCIPLES FOR RESPONSIBLE INVESTMENT'. The main content area is titled 'RIF Assessment' and contains the following text:

RIF Assessment

Once you've begun the exam, you have 30 minutes to complete it. You cannot save your place and come back to the test.

Please note that in order to successfully complete the RI Fundamentals course you must receive a 60% or higher mark in this assessment.

Please note the 14 questions in the exam appear in a one question per page format. Should you wish to check or change your answers, you are able to return to questions you previously answered by using the back arrow. All of the questions are mandatory. Your answers will be submitted as being final when you click on the submit button.

Test duration:	30 minutes
Number of questions:	14
Questions are shown:	One by one
So far you have done this test:	0 times

Below the table is a button labeled 'Proceed to test »'.

On the right side of the page, there are two sections: 'Module material' with a link to 'RIF Assessment' and 'Module progress' showing 'Progress: 0%' and 'Completion rules completed: 0 out of 1'.



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 60% or higher, you will receive an email letting you know that you may retake the assessment.





THIS RECORD OF COMPLETION VERIFIES THAT

ERICKA INTEGRÄATAN

HAS COMPLETED

RESPONSIBLE INVESTMENT ESSENTIALS

AT THE

PRI ACADEMY

ON

01 JANUARY 2015

WITNESSED BY



FIONA REYNOLDS
MANAGING DIRECTOR
PRI ACADEMY



 Principles for Responsible Investment

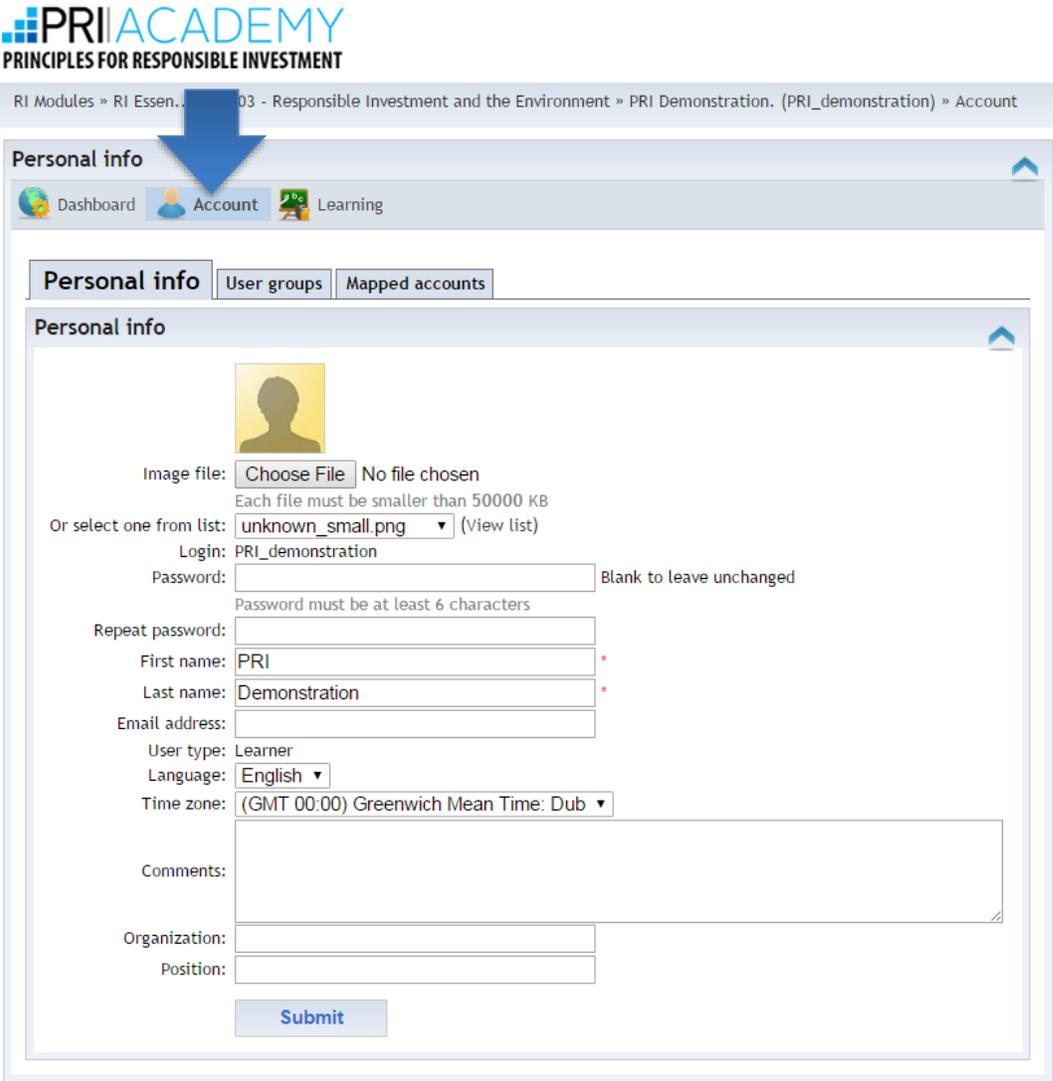
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  CFA Institute

CFA Institute has approved Enhanced Financial Analysis for 6 CE credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE Diary.

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.



The screenshot displays the PRI Academy user interface. At the top, the logo for PRI ACADEMY (PRINCIPLES FOR RESPONSIBLE INVESTMENT) is visible. Below the logo, a breadcrumb trail reads: "RI Modules » RI Essen... 03 - Responsible Investment and the Environment » PRI Demonstration. (PRI_demonstration) » Account". A blue arrow points to the "Account" link in the top navigation bar, which also includes "Dashboard" and "Learning".

The main content area is titled "Personal info" and contains three tabs: "Personal info", "User groups", and "Mapped accounts". The "Personal info" tab is active, showing a form with the following fields:

- Image file:** A "Choose File" button with the text "No file chosen" and a note: "Each file must be smaller than 50000 KB". Below it, a dropdown menu shows "unknown_small.png" and a "(View list)" link.
- Login:** A text field containing "PRI_demonstration".
- Password:** A text field with a note: "Blank to leave unchanged". Below it, a note: "Password must be at least 6 characters".
- Repeat password:** A text field.
- First name:** A text field containing "PRI".
- Last name:** A text field containing "Demonstration".
- Email address:** A text field.
- User type:** A dropdown menu set to "Learner".
- Language:** A dropdown menu set to "English".
- Time zone:** A dropdown menu set to "(GMT 00:00) Greenwich Mean Time: Dub".
- Comments:** A large text area.
- Organization:** A text field.
- Position:** A text field.

A "Submit" button is located at the bottom of the form.

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