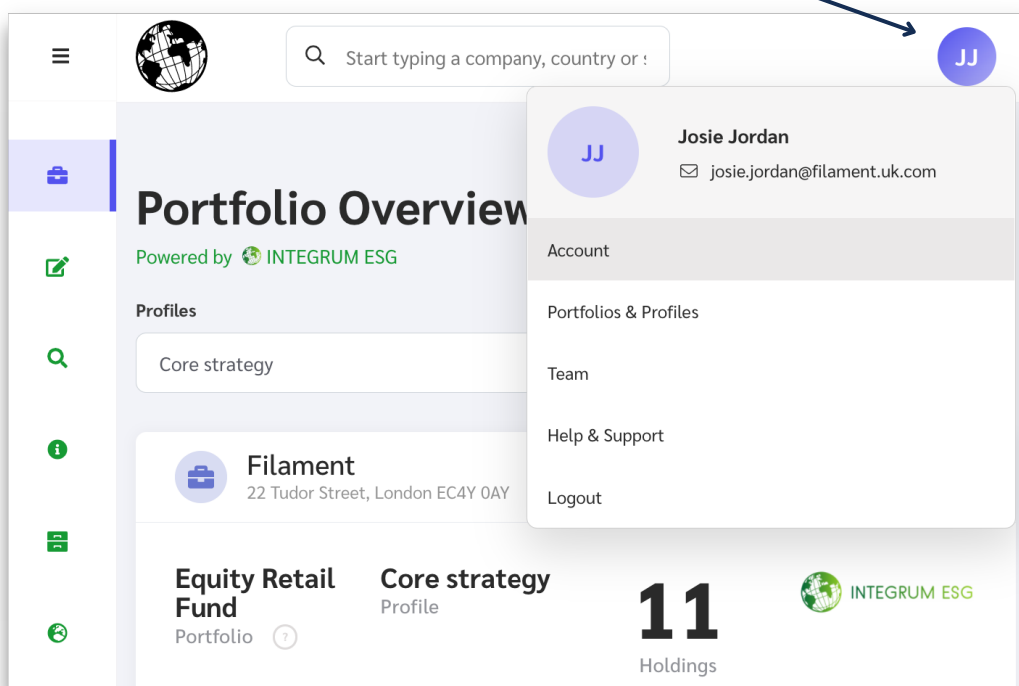




Managing the account

**please note, some features will only be available to designated Super Users, not Standard Users.*

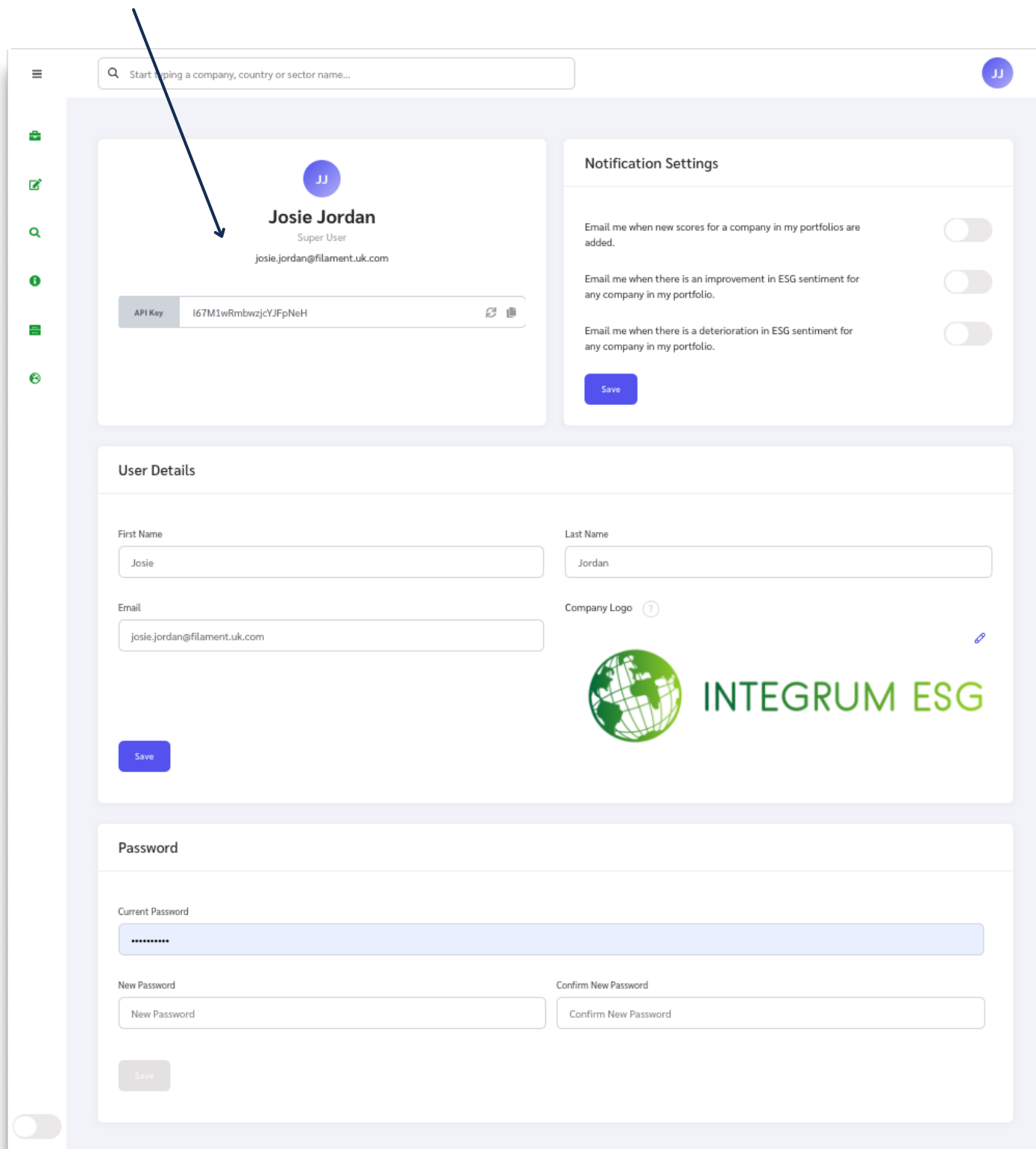
If you click on your initials in the top right corner, you will see a drop-down menu with different options.



By selecting **Account**, you'll be taken to the page where you can:

- choose what email notifications you'd like to be sent
- change your name
- change your email address
- upload your company logo (or choose to use ours)
- change your password (we recommend changing yours fairly regularly)
- generate an API key

On the top left is the function that will allow you to generate an API key – your Tech team will need this to automate the process of uploading updates to your portfolios. We've looked at uploading and customising portfolios in two of our other video tutorials – linked [here](#).



The screenshot shows the user profile page for 'Josie Jordan', a 'Super User' with email 'josie.jordan@filament.uk.com'. A blue arrow points to the 'API Key' field, which contains the value 'I67M1wRmbwzjcYJFpNeH'. To the right is the 'Notification Settings' section with three toggle switches for email notifications. Below these are the 'User Details' and 'Password' sections. The 'User Details' section includes fields for 'First Name' (Josie), 'Last Name' (Jordan), and 'Email' (josie.jordan@filament.uk.com), along with a 'Company Logo' field showing the 'INTEGRUM ESG' logo. The 'Password' section has fields for 'Current Password', 'New Password', and 'Confirm New Password'. A 'Save' button is present at the bottom left of the page.

Start typing a company, country or sector name...

JJ

Josie Jordan
Super User
josie.jordan@filament.uk.com

API Key: I67M1wRmbwzjcYJFpNeH

Notification Settings

Email me when new scores for a company in my portfolios are added. ☐

Email me when there is an improvement in ESG sentiment for any company in my portfolio. ☐

Email me when there is a deterioration in ESG sentiment for any company in my portfolio. ☐

Save

User Details

First Name: Josie

Last Name: Jordan

Email: josie.jordan@filament.uk.com

Company Logo:  INTEGRUM ESG

Save

Password

Current Password:

New Password:

Confirm New Password:

Save

Don't forget to save any changes you make.

The **Help & Support** page is where we host tutorial videos and pdfs, linked [here](#). Our contact details are also here if you need.

The image shows two overlapping screenshots from the Integrum ESG platform. The top screenshot displays the 'Help & Support' page, which includes a search bar, a sidebar with navigation icons, and a main content area with sections for 'Understanding different features' and 'Contact'. A blue button labeled 'Tutorial Videos' is highlighted, with an arrow pointing to the 'Video Hub' page below. The 'Video Hub' page features a dark header with the 'INTEGRUM ESG' logo and a navigation bar with tabs for 'Page Functions', 'Features', and 'Understanding ESG'. Below the tabs, there are four video thumbnails with titles: 'Customising the scoring', 'Glass Box', 'Heatstrips', and 'Managing the account'. Each thumbnail includes a play button icon and a brief description of the video content.

Help & Support

Understanding different features

We have created a set of short video tutorials - each of which clearly Integrum ESG dashboard.

The video button will take you to our corporate website where we host

Tutorial Videos

Contact

For other queries please email us at contact@integrumesg.com

Or call us on **+44 203 4781144** and ask for 'client support'.

Our head office is 20 Little Britain, London, EC1A 7DH, UK

INTEGRUM ESG

Video Hub

Explore up-to-date video tutorials on how to get the most out of our dashboard

Page Functions **Features** **Understanding ESG**

Customising the scoring

This 170-sec video shows you how to create different profiles, and customise them, so the way overall scores are generated will reflect your views and priorities.

Glass Box

This 150-sec video shows you how we provide analysts with transparent ESG data. Other ESG ratings firms offer you a 'black box' - we will always provide you with a 'glass box'.

Heatstrips

The Integrum ESG dashboard uses red-to-green heatstrips throughout, in order to illustrate where a company's score sits relative to its peers. This 100-sec video explains how these heatstrips work.

Managing the account

This 150-sec video explains how to manage your account, including how to change your details such as your name and email address and how to invite new users to your team.

The **Team** page is where you can see the rest of your colleagues who are on the Integrum ESG platform.

The image shows the 'Team Members' page in the Integrum ESG platform. It features a search bar, a sidebar with navigation icons, and a main content area with the title 'Team Members' and a subtitle 'View and manage all current users, or invite new people to the platform.' Below this is a 'Users Table' with columns for Name, Type, Email, and Organisation. The table lists two users: 'Josie Jordan' (Standard User) and 'Josie Jordan' (Super User). A dropdown menu is open for the 'Super User' entry, showing options to 'Edit User Role' and 'Delete User'.

Team Members

View and manage all current users, or invite new people to the platform.

Users Table

Name	Type	Email	Organisation
Josie Jordan	Standard User	josie.jordan@filament.ai	Filament
Josie Jordan	Super User	josie.jordan@filament.uk.com	Filament

Edit User Role

Delete User

Super Users can change other users from Standard to Super and delete Standard Users. (Note: a Super User must be downgraded to Standard before they can be deleted.)

A Super User can also invite other team members to join the platform. Click on 'Invite New User' then enter their name and email - the new user will get an email inviting them to the platform. They need to click the link, set up a profile with a password, and then they will enter the system.

Invite New Users

Enter the user details to invite them to your organisation.

SELECT AN ORGANISATIONINVITE USERSCONFIRM INVITATION



Super User
Can Manage Portfolios And Profiles.



Standard User
Can View Portfolios They've Been Added To.

First Name

Hannah

Last Name

Bennett

Email

hannah.bennett@integrumesg.com

Invite User

Any questions, please just email contact@integrumesg.com