

## How to track the progress of a group of organizations

This article is for Signatories and provides guidance on how to create and download a Collection.

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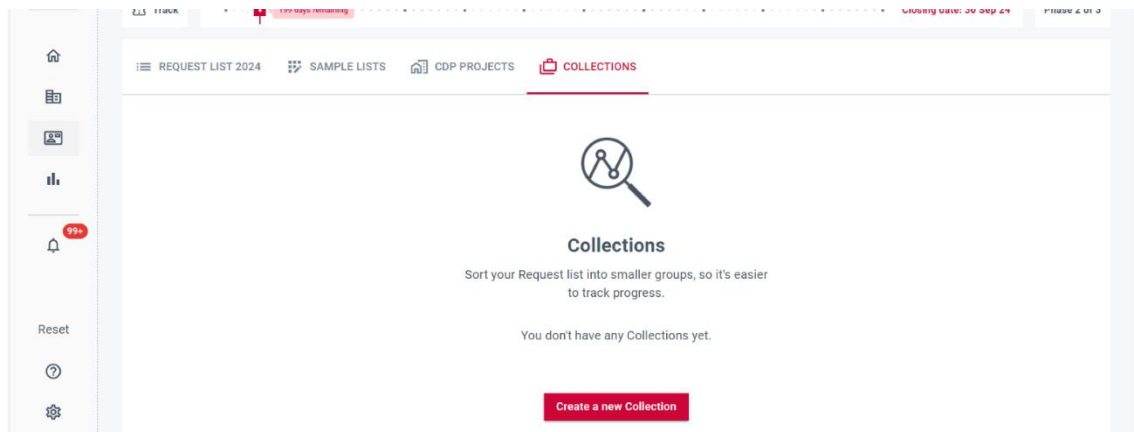
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### Create a Collection:

In the Portal, Signatories can create groups within Sample lists to keep track of the progress that certain groups of organizations make in answering their questionnaires.

To create a Collection:

- From the navigation panel, click Engage organizations, select the Collections tab, click Create new Collection, as shown in the image below:



After clicking on "Create new Collection," fill in the 'Collection name' and 'Collection description' fields.

- ▼ Then select the CDP Sample as the source list for your Collection

## Create Collection

Home / Authority / Manage / 2024 Disclosure Cycle Capital Markets Signatory DSC Meridian Capital, LP Discloser List / Tracking portfolios / Create

### 1. Add a name and description to your Collection

Collection name

Collection description

### 2. Select which list you would like to add from

- From your Request list
- From a CDP Sample

### 3. Select sample

CDP Sample lists

Add a sample name

- Primary Sample
- Fixed Income Sample

## Select organizations to track

### 3. Select sample

CDP Samples

OA Test Sample01 update

### 4. Choose which organisation to track from OA Test Sample01 update

TOTAL ORGANISATIONS 15 ORGANISATIONS SELECTED 3 LATEST ADDITIONS 15

99+

Reset

	Disclosing org. name	Requested org. name	Country	Industry	Questionnaire progress	Response St...	Status	
<input checked="" type="checkbox"/>	Masco Corporation	Masco Corporation	United Stat...	Manufacturi...	<div style="width: 50%;"></div>	No Response	Requested	⋮
<input checked="" type="checkbox"/>	State Street Corpora...	State Street Corpora...	United Stat...	Services	<div style="width: 50%;"></div>	No Response	Requested	⋮
<input checked="" type="checkbox"/>	Ez Tec Empreendim...	Ez Tec Empreendim...	Brazil	Infrastructure	<div style="width: 50%;"></div>	No Response	Requested	⋮

## Click 'create Collection'

### 2. Select which list you would like to add from

From your Request list

From a CDP Sample

### 2. Choose which organizations to track from your 2024 Disclosure Cycle Supply Chain Demo New SCM Discloser List

ALL ORGANIZATIONS 1 SELECTED 1 RECENTLY ADDED 1

Search & filter

	Responding organization	Requested organization	Country/Area	Industry	Questionnaire progress	Response st...	Status	
<input checked="" type="checkbox"/>	SA_Demo_Discloser	SA_Demo_Discloser	New Zealand		<div style="width: 50%;"></div>	No Response	Requested	⋮

1 row selected

Rows per page: 25 1-1 of 1

Create a Collection

## EDIT A COLLECTION

To edit a collection:

Click the *Edit Collection* button

**Collection - QA Test Collection2**  
Home / Authority / Manage / QA testing - do not touch Supply Chain CDP Discloser List / Tracking portfolios / QA Test Collection2

**QA Test Collection2**  
QA Test Collection2

**RESPONSE RATE**

Activated	0	0%
Amended	0	0%
No response	6	100%
Request not sent	0	0%
Submitted	0	0%

[Edit Collection](#) [Delete Collection](#) [Download Collection](#)

Search & filter

Update necessary fields. Requesters can also add/remove organizations to/from the collection.

**Edit Collection**  
Home / Authority / Manage / QA testing - do not touch Supply Chain CDP Discloser List / Tracking portfolios / QA Test Collection2 / Edit

**1. Add a name and description to your Collection**

Collection name  
QA Test Collection2

Collection description  
QA Test Collection2

**4. Choose which organizations to track from UAT10TimSample**

[ALL ORGANIZATIONS](#) [SELECTED ORGANIZATIONS](#) [RECENTLY ADDED](#)

Click *update collection*.

**Update Collection**

**Update Collection**

You're about to update your Collection called QA Test Collection2.

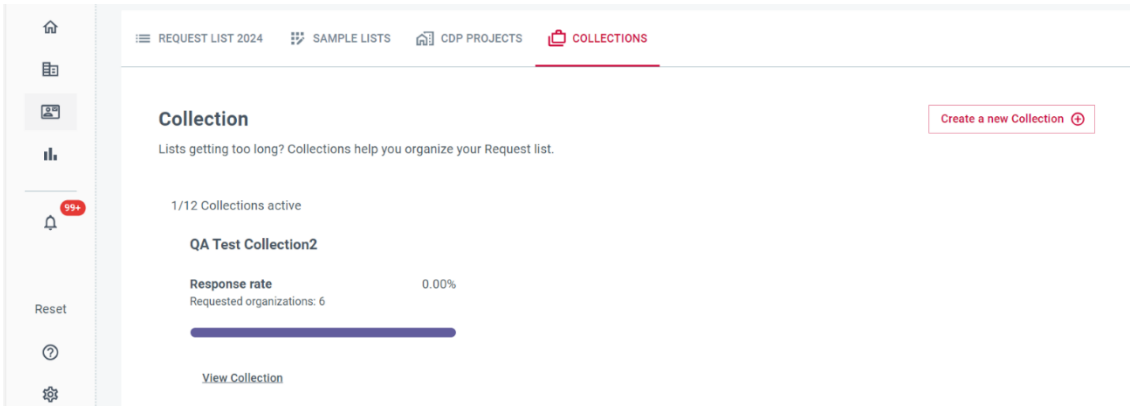
[Continue editing](#) [Update Collection](#)

Response st...	Status	
No Response	Requested	⋮
No Response	Requested	⋮
No Response	Requested	⋮
No Response	Requested	⋮
No Response	Requested	⋮
No Response	Requested	⋮
No Response	Requested	⋮

Rows per page: 25 1-6 of 6

[Cancel](#) [Update Collection](#)

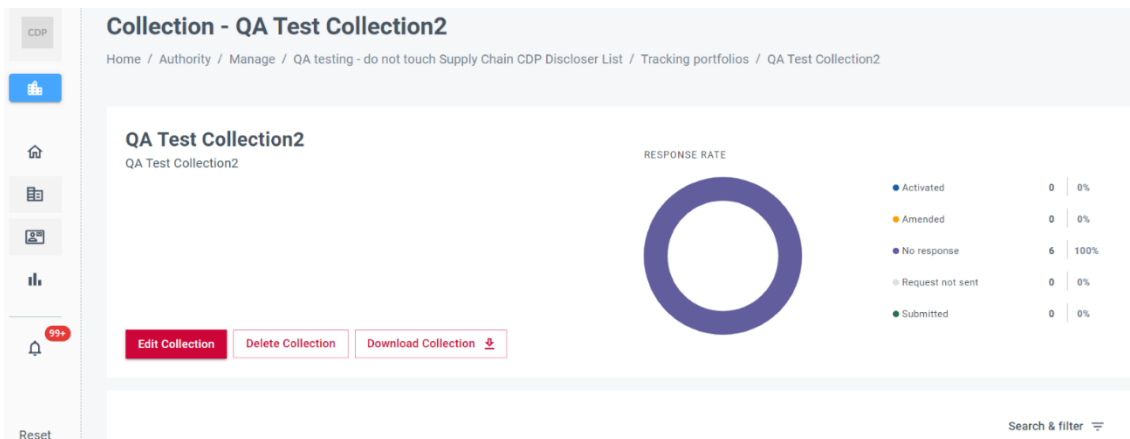
The changes made should be reflected in the collections tab.



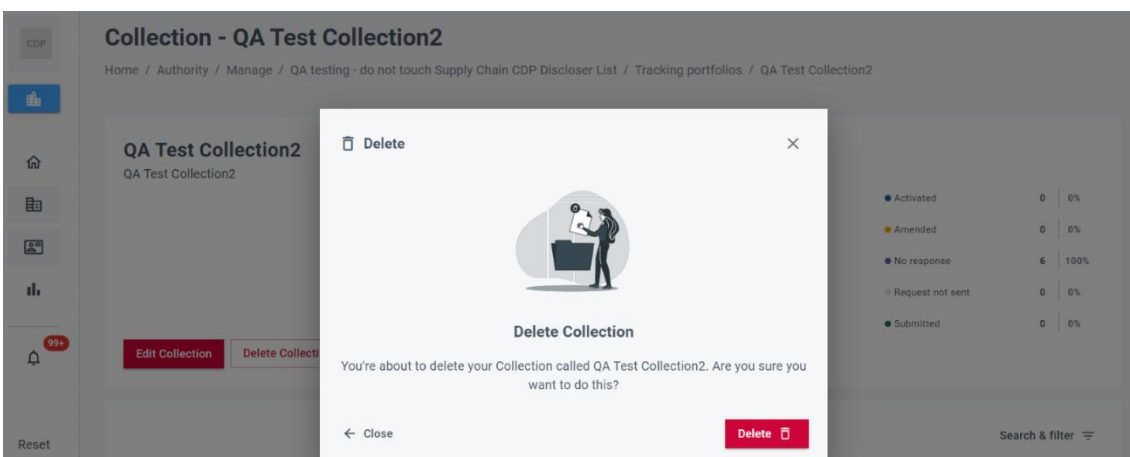
## DELETE A COLLECTION

Deleting a collection does not remove the organizations from the discloser list but simply removes the requested organizations from the collection. To delete a collection:

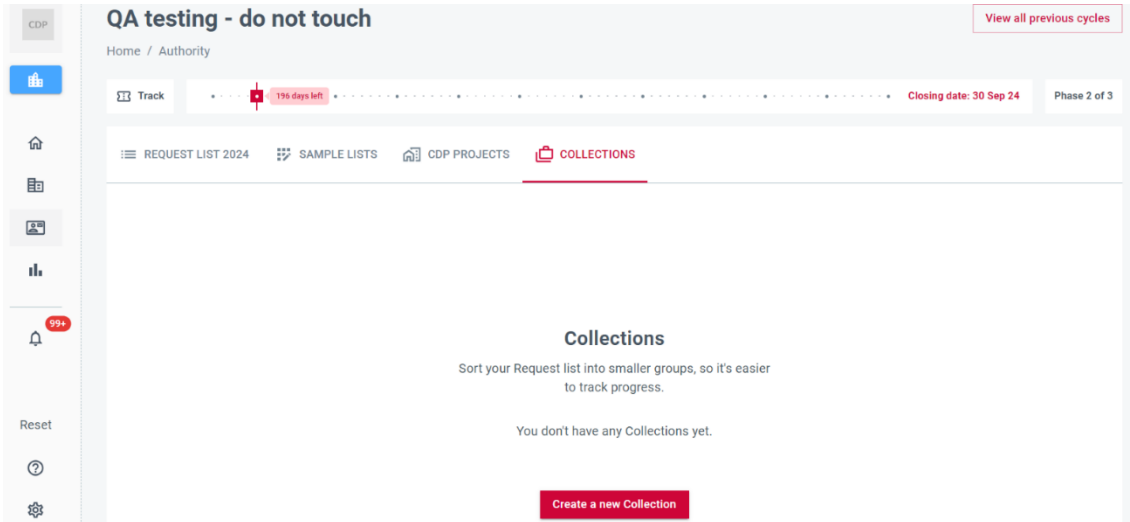
Click *Delete Collection*.



Requesters will receive a warning pop up before the collection gets deleted. Click *close* to keep the collection or *delete* to proceed with deletion.

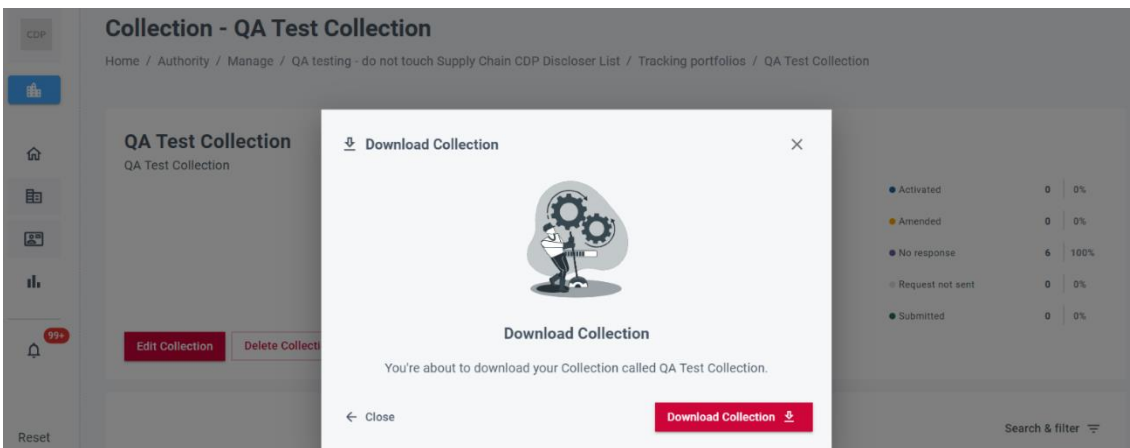


The deleted collection should be removed from the list of collections in the 'collections' tab.



## Download a Collection

After creating the Collection, you can export this information from the platform. Click *Download Collection*.



The portfolio will be saved as an Excel file with the following information:  
*Requested Org Name, Invited Org Name, BIC, DUNS, ISIN, LEI, Ticker, Industry, Activity Group, Activity, Country, Reference Number, Response Status, Previous year response status.*