



Collaborate360: CMO User Onboarding Checklist

This checklist guides you through key steps to become fully ready to use Collaborate360 (C360).

By completing these tasks, you will be able to access C360, navigate your Workspace, view the PPRP Dashboard for your site, and collaborate with your counterparts in Pfizer’s External Supply organization.

Legend for Status Dropdowns

- Not Started** – Task has not begun
- In Progress** – Task is being worked on
- Complete** – Task is finished
- Blocked** – Something is preventing completion
- N/A** – Not applicable for your CMO role

If any task is “Blocked,” please contact your VSOT C360 Champion or Squad Lead for support.

Preboarding Tasks			
Task	Purpose	Due	Status
Attend (or watch recording) of C360 Introductory CMO Presentation Pfizer GTEL (or designee) will share the recording or provide instructions for accessing it.	<i>Provides baseline awareness of the C360 program—its purpose, value, and what’s changing for your team—to ensure consistent understanding before onboarding begins.</i>	Day of Meeting (Recording within 1 week of scheduled Meeting)	Choose an item.
Watch C360 Demo Video Pfizer GTEL (or designee) will share the recording or provide instructions for accessing it.	<i>Provides a visual overview of the C360 platform and demonstrates basic navigation and core functionality.</i>	Prior to First Week Tasks (listed below)	Choose an item.
Complete C360 Training Collaborate360 training for External CMO users	<i>Provides a visual introduction to the C360 platform—showing core navigation, basic functionality, and how Collaborate360 supports collaboration and data exchange between Pfizer and CMOs.</i>	Complete 3-5 days prior to access	Choose an item.



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System Ready Tasks			
Task	Purpose	Due	Status
Verify Your Web Browser Settings	<i>Ensures your browser is configured for optimal performance so you can access and log into Collaborate360 quickly and reliably.</i>	Prior to First Week Tasks (listed below)	Choose an item.
Test your Collaborate360 Login credentials Collaborate360 Pfizer User Login Production	<i>Ensures you can successfully sign in in Collaborate360 with your Single Sign On.</i>	Prior to First Week Tasks (listed below)	Choose an item.
Confirm Access and Set up C360 Notification Settings Pfizer GTEL (or designee) will provide instructions for accessing it. <i>Notifications can only be set up after access is confirmed.</i>	<i>Ensures you receive timely updates and alerts in Collaborate360 by configuring your notification preferences once your access is active.</i>	Following Access <i>This step requires C360 access</i>	Choose an item.
Favorite Login URL	<i>Ensures quick, repeatable access to Collaborate360 by saving the login URL as a browser favorite.</i>	Prior to First Week Tasks (listed below)	Choose an item.

First Week Tasks			
Task	Purpose	Due	Status
Review VSOT/CMO User Guide VSOT/CMO User Guide is available within your C360 Workspace.	<i>Provides essential guidance on how VSOT and CMO users navigate, collaborate, and perform key tasks within Collaborate360.</i>	Within the first week of access	Choose an item.
Review the FAQs FAQs are available on the Landing Page within C360.	<i>Provides quick answers to common questions by directing you to the FAQs for self-service support.</i>	Within the first week of access	Choose an item.
Explore Collaborate360	<i>Allows you to become familiar with your Workspace, key features, and core navigation paths you will use in day-to-day VSOT activities.</i>	Within the first week of access <i>This step requires C360 access</i>	Choose an item.



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Completion Snapshot

- My browser settings are correct
- I can log into Collaborate360
- I can access my C360 workspace
- I have configured my notifications
- I have completed the Training
- I know where to find the User Guide and FAQs
- I know how to submit issues or request support

(Support: Collaborate360@Pfizer.com)



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Web Browser Settings

Recommended Browsers for Collaborate360

- **Google Chrome** is the **preferred web browser** for accessing **Collaborate360**, as it provides the most consistent and reliable user experience.
- **Microsoft Edge** is also supported and works well with Collaborate360 **when browser settings are configured correctly**.

If you choose to use **Microsoft Edge**, follow the steps below to ensure a smooth login experience and avoid access or performance issues.

Microsoft Edge Cookie Settings

Microsoft Edge may block certain cookies by default, which can cause errors when logging into or using **Collaborate360**. To prevent these issues, update your browser settings as outlined below:

1. Select the **ellipsis menu (⋮)** in the top-right corner of the Microsoft Edge browser *(or press **Alt + F** on your keyboard)*.
2. Select **Settings**.
3. From the left-hand menu, select **Privacy, search, and services**.
4. Select **Tracking prevention**.
5. Choose **Basic**.