Data Portal
Public User Guide

November 2023

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Public Users

This section of the user guide is relevant for public (non-PRI signatory) users. Public users can view Transparency Reports without logging in to the Data Portal.

Public users

Public users include all non-PRI signatory users of the Data Portal.

- Public users can view public Transparency Reports and high-level reporting summary statistics, without logging in to the Data Portal.

- Historic public reports from 2014 to 2020 are available on the PRI website, under "Public Signatory Reports".

Accessing the Data Portal

Public users do **not** need to log in to the Data Portal to view reports.
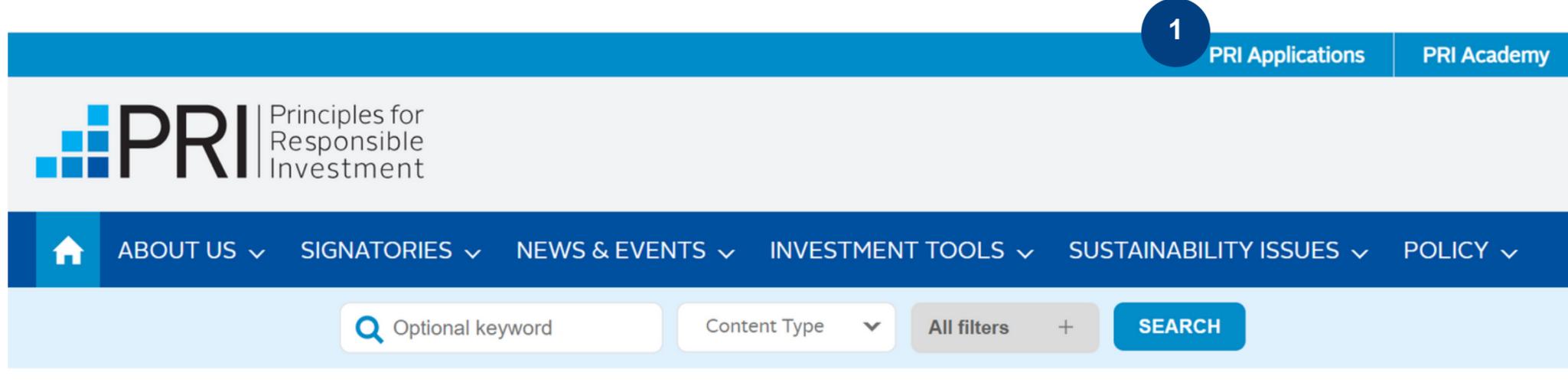
1 Users can access the Data Portal through **the PRI website**, by clicking on PRI Applications.

2 Then clicking on Data Portal on the PRI Applications page.

Accessing the Data Portal

1 On the Data Portal home page, you will see high-level summary statistics for the current year's reporting cycle.

Viewing Transparency Reports
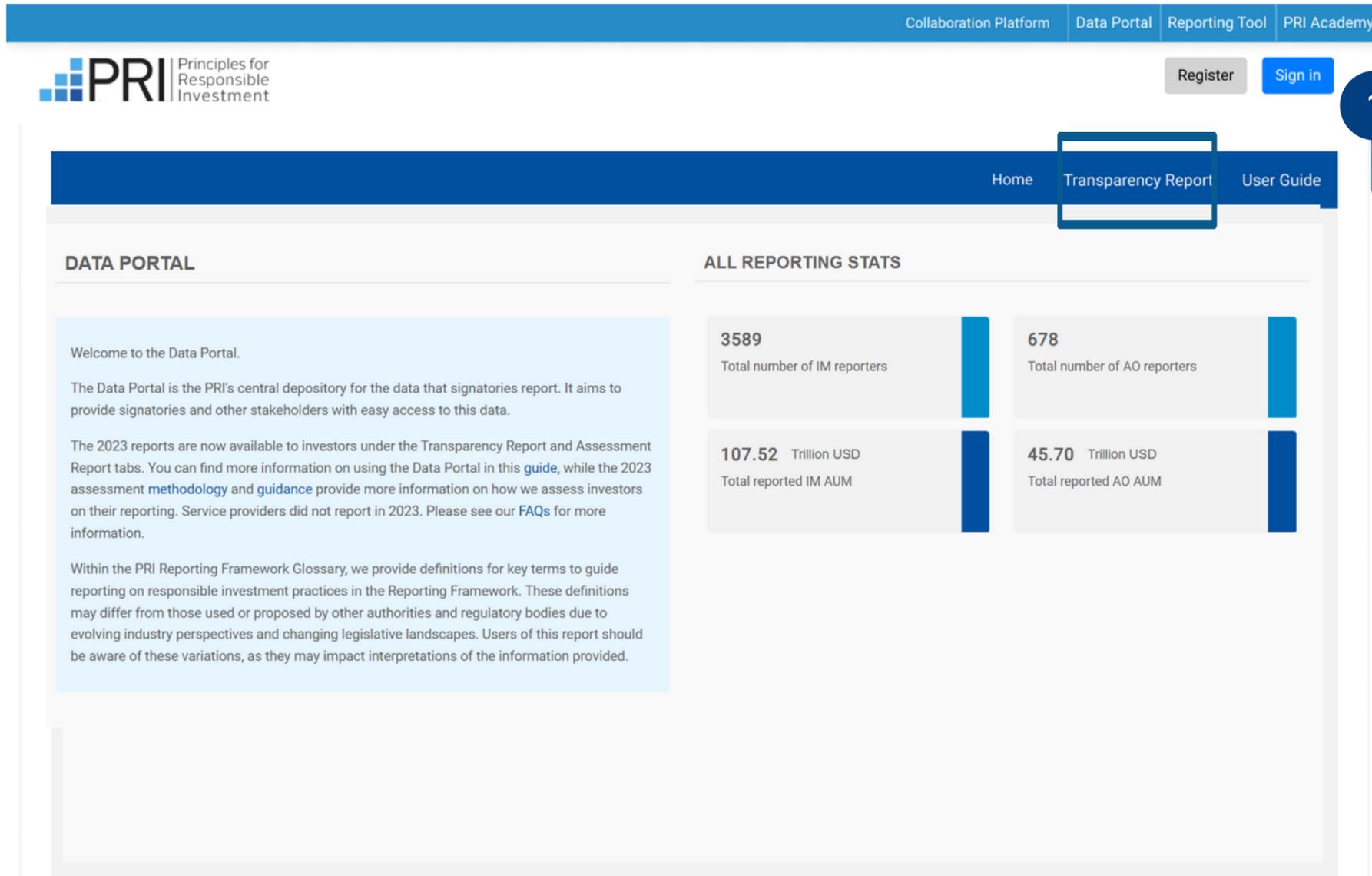
1 Click on the "**Transparency Report**" tab to view Transparency Reports.

Public Transparency Reports include all <u>core indicators</u> a signatory has responded to, as well as responses to <u>plus indicators</u> that they have agreed to make public.

These reports provide accountability and support signatories to have internal discussions about their practices and to discuss these with their clients, beneficiaries, and other stakeholders.

Viewing Transparency Reports

1 Click "**Select a signatory**" and a dialogue box will appear.

2 Choose between "**Investors**" or "**Service Providers**" and a signatory name in the search bar.

Select the signatory organisation from the dropdown menu to view their Transparency Report.

Viewing Transparency Reports

Browse Transparency Reports

SELECT A SIGNATORY

Year

2023

View/Download

- All Modules
- Climate only
- Senior Leadership Statement only

Select Module, Section & Indicator

Module	Select a Module
Section	Select a section
Indicator	Select an indicator

DOWNLOAD PUBLIC REPORT (PDF)

Search for an indicator

Please select a module

1 Select the Reporting **Year** from the dropdown list.

2 The **View/Download options** will differ based on the <u>type of signatory</u> selected <u>(see previous page).</u>

Investors only generate public versions of **RI Transparency**, **Climate Only** and **Senior Leadership Statement Only** reports.
Service providers did not report in 2023 but can view their other reports.
<u>See the full Reporting Framework for investors and service providers for more information.</u>

3 Navigate between different sections and indicators within each module to see the different responses.

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Viewing Transparency Reports

Browse Transparency Reports

1

OO 1

There are **two ways** users can search for an indicator in a Transparency Report: by using the search bar or by using the dropdown menus to select a module, section or indicator.

1

Type the name of an specific indicator or module in the search bar.

Select Module, Section & Indicator

2

Module	Organisational Over...
Section	Organisational infor...
Indicator	OO 1

Organisational information

Categorisation

Indicator	Type of indicator	Dependent on	Gateway to	Disclosure	Subsection	PRI Principle
OO 1	CORE	Signatory category	Multiple, see guidance	PUBLIC	Categorisation	GENERAL

Select the type that best describes your organisation or the services you provide.

2

Select the specific **module, section, and/or indicator** of interest, to view the signatory's responses in the Data Portal.

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Downloading Transparency Reports

To download a Transparency Report, select a signatory name and the module(s) of interest and click on the download button in the bottom left-hand corner.

Browse Transparency Reports

1

SELECT A SIGNATORY

Year

2023 ▾ ✕

View/Download

● All Modules
○ Climate only
○ Senior Leadership Statement only

Search for an indicator ▾

Please select a module

1 Once selected, the signatory's name will appear at the top of the page.

Select Module, Section & Indicator

Module | Select a Module ▾

Section | Select a section ▾

Indicator | Select an indicator ▾

2 Click on the "**Download Public Report**" button to download the full report in PDF.

2

DOWNLOAD PUBLIC REPORT (PDF)

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Accessing the User Guide
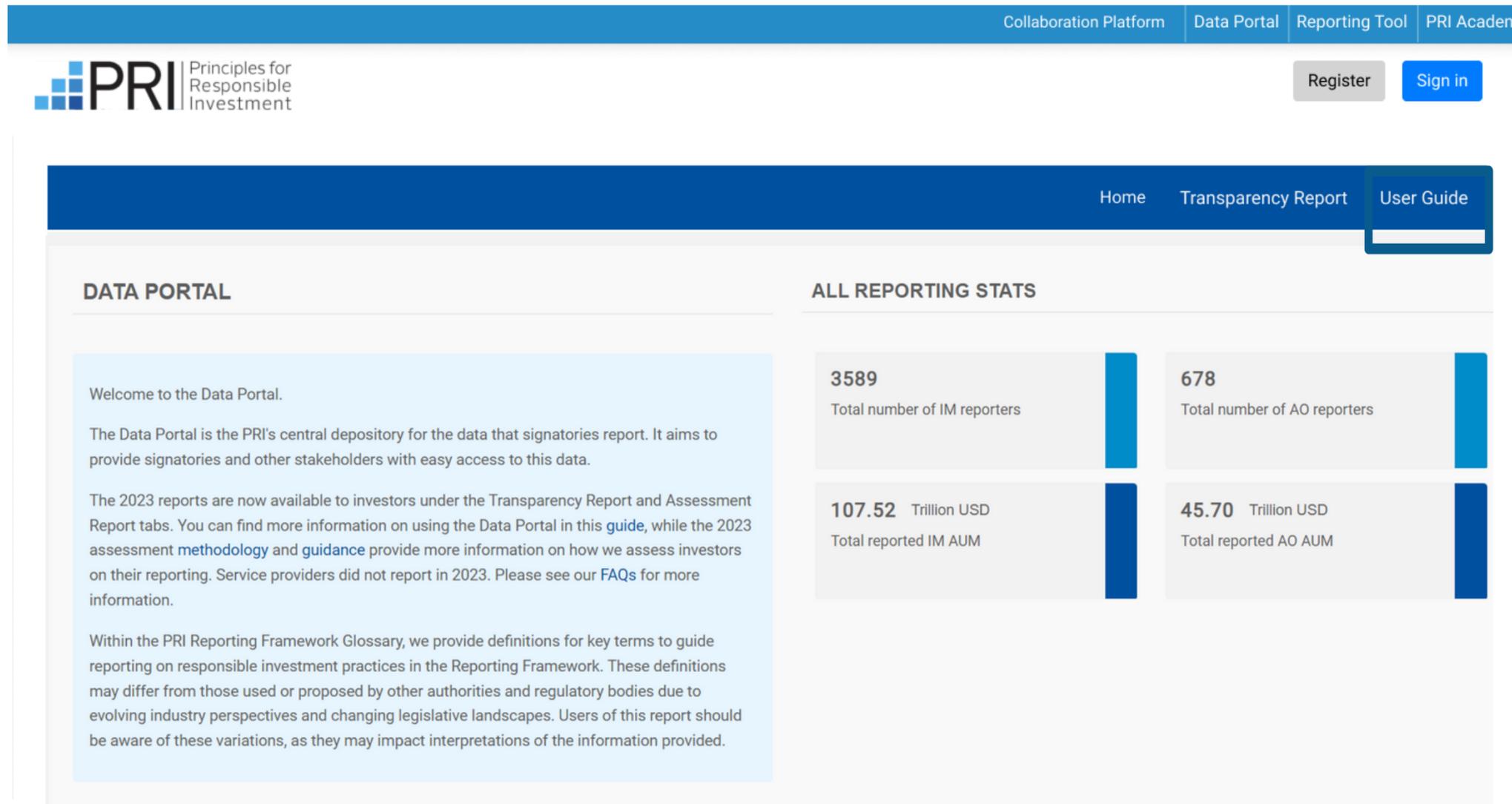
1 Return to this user guide at any point by clicking on the **User Guide** tab.

Public users can also access the Signatory User Guide.

Thank you

If you have any questions, please contact reporting@unpri.org.

Look out for more new features in the Data Portal, and stay up to date with the latest Reporting and Assessment news on R&A Updates.

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