

Data Portal user guide

March 2022



Contents

[Accessing the Data Portal](#)

Exploring the Data Portal:

- [Home](#)
- [My Transparency Report](#)
- [Legacy Report](#)

[Coming soon...](#)

[Appendix: How to register](#)

Accessing the Data Portal

Users whose accounts have already been granted permission to access an organisation's data can log in to the Data Portal via [the PRI website](#).

The screenshot shows the top navigation bar of the PRI website with links for COVID-19, Careers, Collaboration Platform, Data Portal (highlighted), and Reporting Tool. Below the navigation bar is the PRI logo and the text 'Principles for Responsible Investment'. A sign-in form is displayed below the logo, featuring an 'Email address*' field, a password field, and radio buttons for 'I'm not signed up, I don't have a password' and 'I have a password'. A 'CONTINUE' button is located at the bottom right of the form.

An organisation's **Main Admin** or **Admin** users can grant additional staff access to the Data Portal. Follow the steps in the [Appendix](#), or see more information the [Permissions system user guide](#).

You will need to accept the Terms and Conditions before you can view and download reports.

Home

If you have access to multiple organisation's data, you can move between organisations via the dropdown menu.

Collaboration Platform | Data Portal | Reporting Tool | PRI Academy

Hi

[Logout](#)

[Home](#) | [My Transparency Report](#) | [User Guide](#)

TRANSPARENCY REPORT	REPORTING STATS								
CHANGE REQUEST INFORMATION	<table border="1"><tr><td>Reporters growth</td><td>Number of assessed modules</td></tr><tr><td>710</td><td>18</td></tr><tr><td>Growth in AUM</td><td>Average number of assessed modules</td></tr><tr><td>17.8 Billion USD</td><td>4</td></tr></table>	Reporters growth	Number of assessed modules	710	18	Growth in AUM	Average number of assessed modules	17.8 Billion USD	4
Reporters growth	Number of assessed modules								
710	18								
Growth in AUM	Average number of assessed modules								
17.8 Billion USD	4								
	<table border="1"><thead><tr><th colspan="2">YOUR ORGANISATION'S STATS</th></tr></thead><tbody><tr><td>PLUS questions answered</td><td>PLUS questions disclosed</td></tr><tr><td>71</td><td>71</td></tr></tbody></table>	YOUR ORGANISATION'S STATS		PLUS questions answered	PLUS questions disclosed	71	71		
YOUR ORGANISATION'S STATS									
PLUS questions answered	PLUS questions disclosed								
71	71								

Reporting Stats provides an overview across all signatories that reported in the current year.

Your organisation's stats provides stats of PLUS indicators that your organisation completed in the current year.

My Transparency Report

Responses are shown one module at a time – you must select a module from the “Module” dropdown menu to see responses.

The screenshot shows the 'My Transparency Report' interface. At the top, there are navigation links for 'Home', 'My Transparency Report', and 'User Guide'. Below this, there are buttons for 'View Report' and 'Download Report'. The left sidebar contains filters for 'Public/Private' (Public and Public and Private), 'Year (read-only)' (2021), and 'View/Download' (All Modules, Climate only, Senior Leadership Statement only). The main content area is titled 'Organisational information' and includes a search bar for indicators. Below this is a 'Categorisation' section with a table of indicators. The 'Module' dropdown menu is open, showing options like 'Organisational Over...', 'Senior Leadership Stat...', 'Organisational Overvi...', 'Investment and Stewar...', 'Manger Selection, App...', 'Listed Equity (LE)', and 'Real Estate (RE)'. An orange box highlights the 'Module' dropdown menu. Another orange box highlights a scroll bar on the right side of the page. A third orange box highlights the 'View Report' button. A fourth orange box highlights the 'Download Report' button.

Public/Private

Public Public and Private

Year (read-only)

2021

View/Download

All Modules

Climate only

Senior Leadership Statement only

Select Module, Section & Indicator

Module: Organisational Over...

Section: Senior Leadership Stat...

Indicator: Organisational Overvi...

Investment and Stewar...

Manger Selection, App...

Listed Equity (LE)

Real Estate (RE)

DOWNLOAD PUBLIC

DOWNLOAD PUBLIC AND PRIVATE DATA (CSV)

Search for an indicator

Download Report

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.

(B) Corporate pension or superannuation or retirement or provident fund or plan

(1) This is our only (or primary) type

Indicator	Type of indicator	Dependent on	Gateway to	Disclosure	Subsection	PRI Principle
OO 1.1	CORE	OO 1	N/A	PUBLIC	Categorisation	GENERAL

Select which pensions you offer.

(y) type

Scroll down the page to view all indicators of the selected module.

My Transparency Report

The screenshot shows the 'My Transparency Report' interface. At the top right, there are navigation links for 'Home', 'My Transparency Report', and 'User Guide'. The main content area includes a 'View Report' button, a search bar for indicators, and a 'Year (read-only)' dropdown menu currently set to '2021'. Below this is a 'View/Download' section with radio buttons for 'All Modules', 'Climate only', and 'Senior Leadership Statement only'. Further down is a 'Select Module, Section & Indicator' section with three dropdown menus for 'Module', 'Section', and 'Indicator'. At the bottom, there are two buttons: 'DOWNLOAD PUBLIC AND PRIVATE REPORT (PDF)' and 'DOWNLOAD PUBLIC AND PRIVATE DATA (CSV)'. Five orange callout boxes with arrows point to specific elements: 1) 'View Report' button: 'The public report includes all CORE indicators, as well as any PLUS indicators* that the organisation chose to disclose.** The public and private report includes all responses.' 2) 'Year (read-only)' dropdown: 'The Year field is read-only.' 3) 'View/Download' section: 'You can also navigate to a particular sub-report, section or indicator...' 4) 'DOWNLOAD PUBLIC AND PRIVATE DATA (CSV)' button: '...and download a copy of all data corresponding to the currently selected filters – in either pdf or csv format.'

*for investor signatories. For service provider signatories, the public version includes all mandatory-to-disclose indicators, and any voluntary-to-disclose that the organisation chose to disclose.

** "Public" refers to data that will be included in public reports, when they are published (June 2022) – it does not mean the data is currently public.

My Transparency Report

The screenshot shows a web interface for 'My Transparency Report'. At the top, there is a navigation bar with 'Home', 'My Transparency Report', 'Legacy Reports', and 'User Guide'. Below the navigation bar, there is a 'View Report' section and a 'Download Report' button. A table lists reports with columns for 'PDF', 'Report Title', and 'Data Updated'. The table contains three rows of reports, all titled 'PRIVATE RI REPORT', with 'Data Updated' dates of 2021-11-19, 2021-10-20, and 2021-10-19. Two callout boxes provide instructions: one points to the 'Download Report' button, and another points to the 'Data Updated' column, advising users to download the most recent report.

Home My Transparency Report Legacy Reports User Guide

View Report

Download Report

Note: reports may take several minutes to download

PDF	Report Title	Data Updated
filter data...	filter data...	filter data...
Download	PRIVATE RI REPORT	2021-11-19
Download	PRIVATE RI REPORT	2021-10-20
Download	PRIVATE RI REPORT	2021-10-19

To view previously downloaded reports, go to **Download Report**.

Make sure you are downloading the report with the **most recent "Data Updated" date**

Legacy Report

Home My Transparency Report Legacy Reports User Guide								
Submitted Year	My Transparency Report		My Climate Change Report		My Assessment Report	Full Dataset of Public Responses		
	Public	Public and Private	Public	Public and Private		Investor	Climate Change	Service Provider
2014	Unavailable	Unavailable	Unavailable	Unavailable				Unavailable
2015	Unavailable	Unavailable	Unavailable	Unavailable				Unavailable
2016	Unavailable	Unavailable	Unavailable	Unavailable				Unavailable
2017	Unavailable	Unavailable	Unavailable	Unavailable				Unavailable
2018	Download	Download	Unavailable	Unavailable	Download	Download	Download	Download
2019	Download	Download	Unavailable	Download	Download	Download	Download	Download
2020	Download	Download	Download					

Note: We recommend you close all excel workbooks before opening any of the excel based legacy reports, otherwise you may receive some warning messages. This relates to excel behaviour and not the data portal.

Legacy Reports will show your organisation's historic reports from 2014 to 2020

Your Legacy Reports include all previously submitted Transparency Reports and Assessment Reports.

Coming soon...

The changes already made to the Data Portal are just one part of the work we are doing in response to signatories' contributions to our wide-ranging [Reporting and Assessment review](#).

Look out for more new features in the Data Portal, as well as the revamped public Transparency Reports (for investors and service providers) and private Assessment Reports (for investors), which we aim to launch in the first half of 2022.

Read more about the timeline for the [next phases of the reporting review](#).

Thank you

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

Appendix: How to register

Register to access the Data Portal: Step 1

If the user does not already have a PRI account, they can [create an account](#) on the PRI website.

Register

*required fields

About You

First Name*

Last Name*

Email (this will become your username)*

Confirm email*

Password* Minimum of 8 characters Show password

Password*

Confirm password*

Organisation*

Register to receive updates on your organisation's PRI reporting framework (PRI signatories only)

Register to access your organisation's reports and data from 2020 and previous years (PRI signatories only)

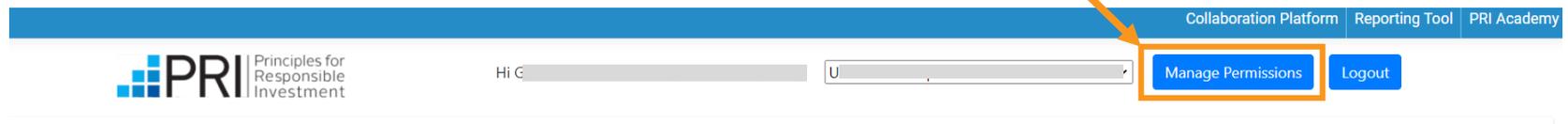
Are you an academic?*

NEXT

Register to access the Data Portal: Step 2

Once the user has a PRI account, an organisation's **Main Admin** or **Admin** users can grant permission for that user to access the organisation's reports in the Data Portal.

A Main Admin or Admin user can access the Permissions System via the **"Manage permissions"** button within the Data Portal.



Register to access the Data Portal: Step 3

All users registered to the organisation are shown on the "Users/Roles" page.

Users / Roles

Full Name	Username (e-mail address)	Role
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Reporting Contributor <input checked="" type="checkbox"/> Data Portal Contributor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Main Admin
<input type="checkbox"/>		<input checked="" type="checkbox"/> Reporting Contributor <input checked="" type="checkbox"/> Data Portal Contributor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Main Admin
<input type="checkbox"/>		<input checked="" type="checkbox"/> Reporting Contributor <input checked="" type="checkbox"/> Data Portal Contributor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Main Admin
<input type="checkbox"/>		<input checked="" type="checkbox"/> Reporting Contributor <input checked="" type="checkbox"/> Data Portal Contributor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Main Admin
<input type="checkbox"/>		<input checked="" type="checkbox"/> Reporting Contributor <input checked="" type="checkbox"/> Data Portal Contributor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Main Admin

To change a user's permissions, the Main Admin or Admin user can select the user by ticking the box to the left of their name, and tick or un-tick the desired Role(s) (see next page for an explanation of each Role).

To add a new user, select "Invite user(s)", enter the user's email address and select the desired Role(s).

Rows per page: 5 11-15 of 28

Read the [Permissions system user guide](#) for more information

Register to access the Data Portal: User roles

Users are granted permissions by being assigned one or more Roles:

Role	Assigned by	Permissions System*	Reporting Tool**	Data Portal***
Main Admin (Primary contact)	PRI	✓	✓	✓
Admin	Main Admin / Admin	✓	✓	✓
Reporting Contributor	Main Admin / Admin		✓	
Data Portal Contributor	Main Admin / Admin			✓

- *Access to the Permissions System allows users to assign “Admin”, “Reporting Contributor” and “Data Portal Contributor” Roles to other users.
- **Access to the Reporting Tool allows users to view, edit and submit reporting responses.
- ***Access to the Data Portal allows users to view and download private and public reports.