Data Portal user guide

March 2022

Contents

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.

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.

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.

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

My Transparency Report

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.

Home | My Transparency Report | User Guide

View Report

Public/Private

Search for an indicator

○ Public ● Public and Private

Year (read-only)

2021

Please select a module

The **Year** field is read-only.

View/Download

● All Modules
○ Climate only
○ Senior Leadership Statement only

You can also navigate to a particular **sub-report**, **section** or **indicator**…

Select Module, Section & Indicator

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

…and download a copy of all data corresponding to the currently selected filters – in either **pdf** or **csv** format.

DOWNLOAD PUBLIC AND PRIVATE REPORT (PDF)

DOWNLOAD PUBLIC AND PRIVATE DATA (CSV)

*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.

PRI | Principles for Responsible Investment

My Transparency 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**

PRI | Principles for Responsible Investment

Legacy Report

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	Download	Download	Download	Download	Download

Home   My Transparency Report   Legacy Reports   User Guide

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

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.

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?* — No

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.

Collaboration Platform | Reporting Tool | PRI Academy

Hi G | U | Manage Permissions | Logout
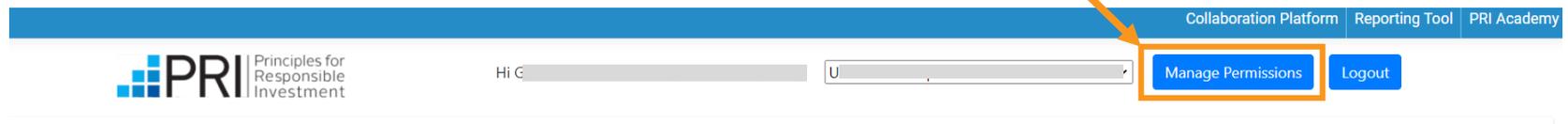
Register to access the Data Portal: Step 3

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

Users / Roles

Type here to Search

Full Name	Username (e-mail address)	↓ Role
		☑ Reporting Contributor ☑ Data Portal Contributor ☑ Admin ☐ Main Admin
		☑ Reporting Contributor ☑ Data Portal Contributor ☑ Admin ☐ Main Admin
		☑ Reporting Contributor ☑ Data Portal Contributor ☑ Admin ☐ Main Admin
		☑ Reporting Contributor ☑ Data Portal Contributor ☑ Admin ☐ Main Admin
		Contributor ☑ Data Portal Contributor ☑ Admin ☐ 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   ‹ ›

INVITE USER(S)   REVOKE ACCESS

Read the Permissions system user guide for more information

PRI | Principles for Responsible Investment

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.