

Data Portal user guide

September 2022



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Public users

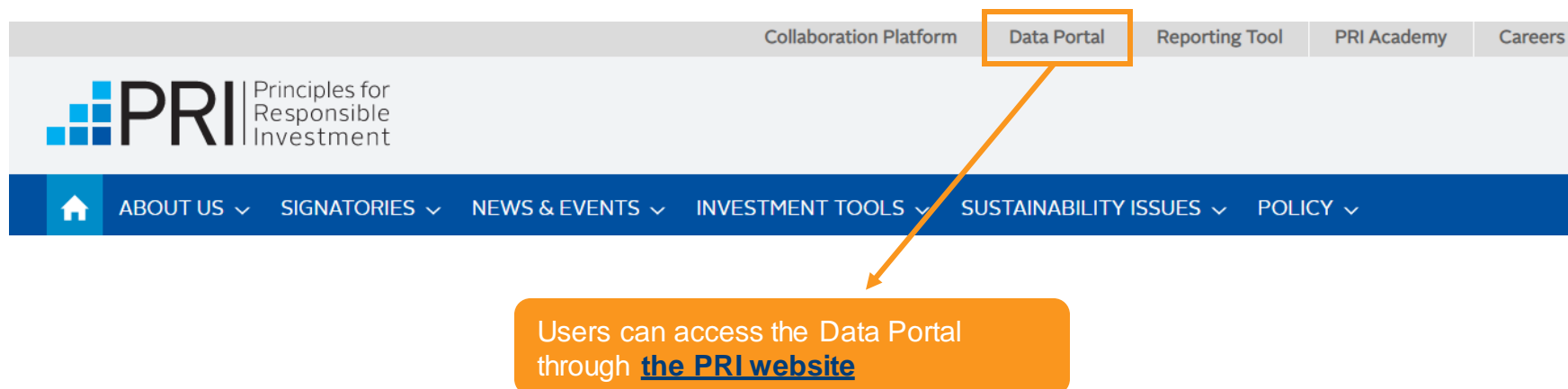
This section of the user guide is relevant for public (non-PRI signatory) users. Public users can view public reports without logging in to the Data Portal.

Public users

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

- Public users (users that are not PRI signatories) can view public 2021 Transparency Reports and high-level reporting summary statistics, without logging in to the Data Portal.
 - See "[Accessing the Data Portal](#)"
 - See "[Viewing Transparency Reports](#)"
- Historic public reports from 2014 to 2020 are available on the PRI website, under [Public Signatory Reports](#).

Accessing the Data Portal



The screenshot shows the top navigation bar of the PRI website. The bar is divided into two main sections. The top section is light gray and contains the PRI logo on the left, followed by the text 'Principles for Responsible Investment'. To the right of the logo, there are five links: 'Collaboration Platform', 'Data Portal', 'Reporting Tool', 'PRI Academy', and 'Careers'. The 'Data Portal' link is highlighted with an orange box. An orange arrow points from this box to a callout box below. The bottom section of the navigation bar is dark blue and contains a home icon followed by six menu items: 'ABOUT US', 'SIGNATORIES', 'NEWS & EVENTS', 'INVESTMENT TOOLS', 'SUSTAINABILITY ISSUES', and 'POLICY', each with a downward arrow.

Users can access the Data Portal through [the PRI website](#)

The PRI Data Portal is also available to access directly at:
<https://ctp.unpri.org/dataportalv2>

Accessing the Data Portal – Home

Public users do not need to log in to the Data Portal to view reports.

PRI DATA PORTAL

The data portal is PRI's central depository for signatories' reporting data. The platform's aim is to increase access to reporting information. The user guide provides additional details on what users have access to and functionalities that are currently available.

ALL REPORTING STATS

Total number of IM reporters	Total number of AO reporters	Total number of SP reporters
2244	552	301
Total reported IM AUM		Total reported AO AUM
107.5 Trillion USD		27.7 Trillion USD

On the Data Portal home page, you will see high-level summary statistics for PRI reporting in 2021.

Viewing Transparency Reports

Public users do not need to log in to the Data Portal to view reports.

The screenshot shows the PRI Data Portal interface. At the top left is the PRI logo (Principles for Responsible Investment). At the top right are 'Register' and 'Sign in' buttons. Below the header is a navigation bar with 'Home', 'Transparency Report' (highlighted in orange), and 'User Guide'. The main content area is split into two columns. The left column is titled 'PRI DATA PORTAL' and contains a paragraph: 'The data portal is PRI's central depository for signatories' reporting data. The platform's aim is to increase access to reporting information. The user guide provides additional details on what users have access to and functionalities that are currently available.' The right column is titled 'ALL REPORTING STATS' and contains a table with the following data:

Total number of IM reporters	Total number of AO reporters	Total number of SP reporters
2244	552	301
Total reported IM AUM		Total reported AO AUM
107.5 Trillion USD		27.7 Trillion USD

An orange arrow points from the 'Transparency Report' tab to an orange callout box with the text: 'Click on the "Transparency Report" tab to view public 2021 reports.'

Public Transparency Reports include all public and mandatory indicators a signatory has responded to.

They help assure accountability, act as a standardised transparency mechanism, and are a useful tool for learning and development.

Viewing Transparency Reports

Public users do not need to log in to the Data Portal to view reports.

Click "**select a signatory**" and a dialogue box will appear

The screenshot shows the 'Browse Transparency Reports' page. At the top right, there are navigation links for 'Home', 'Transparency Report', and 'User Guide'. The main heading is 'Browse Transparency Reports'. Below this, there is a blue button labeled 'SELECT A SIGNATORY'. To the right of the button, it says 'No signatory selected'. Below that, a message reads 'To view this page, please select a signatory.' A dialog box titled 'Select a Signatory' is open, showing two radio buttons: 'Investors' (selected) and 'Service Providers'. Below the radio buttons is a dropdown menu with the text 'Select...'. An orange callout box points to the 'SELECT A SIGNATORY' button, and another orange callout box points to the 'Investors' radio button and the dropdown menu.

Choose between "**investors**" or "**service providers**" and select a signatory from the dropdown menu

Alternatively, type the signatory's name into the search box to select the organisation

Viewing Transparency Reports

Public users do not need to log in to the Data Portal to view reports.

The screenshot shows the 'Browse Transparency Reports' interface. At the top right, there are navigation links for 'Home', 'Transparency Report', and 'User Guide'. The main content area is titled 'Browse Transparency Reports'. On the left, there is a sidebar with a blue header 'SELECT A SIGNATORY'. Below this, there are sections for 'Year (read-only)' (set to 2021), 'View/Download' (with radio buttons for 'All Modules', 'Climate only', and 'Senior Leadership Statement only'), and 'Select Module, Section & Indicator' (with dropdown menus for 'Module', 'Section', and 'Indicator'). At the bottom of the sidebar is a button labeled 'DOWNLOAD PUBLIC REPORT (PDF)'. In the main content area, there is a search bar 'Search for an indicator' and a message 'Please select a module'. An orange box highlights a grey area at the top of the main content area, with an arrow pointing to it from an orange callout box that says 'Once selected, the signatory's name will appear at the top of the page'. Another orange callout box at the bottom right says 'Click the "download report" button to download full report in PDF', with an arrow pointing to the 'DOWNLOAD PUBLIC REPORT (PDF)' button.

Viewing Transparency Reports

Public users do not need to log in to the Data Portal to view reports.

The screenshot shows the 'Browse Transparency Reports' page. The navigation bar includes 'Home', 'Transparency Report', and 'User Guide'. The main content area is titled 'Browse Transparency Reports' and contains several interactive elements:

- SELECT A SIGNATORY**: A blue button at the top left.
- Year (read-only)**: A dropdown menu currently showing '2021'. An orange callout box points to this field with the text: "The Year field is read-only. Public reports from 2014 to 2020 are available on our [website](#)."
- View/Download**: A section with three radio button options: 'All Modules' (selected), 'Climate only', and 'Senior Leadership Statement only'. An orange callout box points to this section with the text: "The View/Download options will differ based on the type of signatory selected. **Investors' reports generate Climate Only and Senior Leadership Statement Only reports.* ***Service providers' reports do not generate additional reports.*"
- Select Module, Section & Indicator**: A section with three dropdown menus: 'Module' (Select a Module), 'Section' (Select a section), and 'Indicator' (Select an indicator). An orange callout box points to this section with the text: "Navigate between different sections and indicators within each module".
- DOWNLOAD PUBLIC REPORT (PDF)**: A button at the bottom left.

Viewing Transparency Reports

Public users do not need to log in to the Data Portal to view reports.

Browse Transparency Reports

Search for an indicator

Select the **module**, and search for a specific indicator in the search bar

Select Module, Section & Indicator

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

And/or select the specific **module, section, and indicator** of interest, to view individual responses in the Data Portal

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.

User Guide

PRI DATA PORTAL

The data portal is PRI's central depository for signatories' reporting data. The platform's aim is to increase access to reporting information. The user guide provides additional details on what users have access to and functionalities that are currently available.

ALL REPORTING STATS

Total number of IM reporters	Total number of AO reporters	Total number of SP reporters
2244	552	301

Return to this user guide at any point by clicking on the "User Guide" tab

Signatory users

This section of the user guide is relevant for PRI signatory users.

PRI signatories can log in to the Data Portal to view and download reports.

Available functionalities for signatories that did not report in 2021

The available view/download functionalities in the Data Portal differ depending on the type of signatory, and what the signatory has reported on.

Signatories that did not report in 2021 and currently do not have access to the Data Portal will be provided access in due course.

- Signatories that did not report in 2021 will not have any of their own Transparency or Assessment Reports to view until they have submitted a response.
- Signatories that did not report in 2021 can view public 2021 reports and high-level summary statistics of reporting in 2021, without logging in to the Data Portal.
 - See "[Accessing the Data Portal](#)"
 - See "[Viewing Transparency Reports](#)"
- Historic public reports from 2014 to 2020 are available on the PRI website, under [Public Signatory Reports](#).
- See section on [public users](#) for more information.

Available functionalities for signatories that reported in 2021

The available view/download functionalities in the Data Portal differ depending on the type of signatory, and what the signatory has reported on.

- Investors (asset owners, investment managers) that reported in 2021 can view or download:
 - High-level summary statistics of reporting in 2021
 - Their own 2021 public and private Transparency Reports, with the option to download:
 - Climate Only reports (all public and private climate-related indicators)
 - Senior Leadership Statement Only reports
 - Other signatories' 2021 public Transparency Reports
 - Their own 2021 Assessment Reports and summary or module-level scorecards of 2021 assessment scores
 - Their own historic Transparency Reports and Assessment Reports from 2014 to 2020, in PDF
 - Historic public responses from 2014 to 2020, in CSV
- Service providers that reported in 2021 can view or download:
 - High-level summary statistics of reporting in 2021
 - Their own 2021 public and private Transparency Reports
 - Other signatories' 2021 public Transparency Reports
 - Their own historic Transparency Reports from 2014 to 2020, in PDF
 - Historic public responses from 2014 to 2020, in CSV

Accessing the Data Portal

PRI signatories can **log in** to the Data Portal to view their own reports and public reports.

Please see our [Permissions System guide](#) for information on how to log in and/or register for the Data Portal.

Users whose accounts have already been granted access via the Permissions System can log in to the Data Portal through [the PRI website](#)

An organisation's **Admin** users can grant additional staff access to the Data Portal.

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

The screenshot shows the PRI website's Data Portal sign-in interface. At the top, a navigation bar includes links for COVID-19, Careers, Collaboration Platform, Data Portal (highlighted), and Reporting Tool. Below this is the PRI logo and the text 'Principles for Responsible Investment'. A secondary navigation bar contains links for Home, PRI, SIGNATORIES, NEWS & EVENTS, INVESTMENT TOOLS, and SUSTAINABILITY ISSUES. The main content area is titled 'Sign in' and contains a form with the following elements:

- An 'Email address*' field with a red asterisk indicating it is a required field.
- Two radio button options: 'I'm not signed up, I don't have a password' and 'I have a password' (which is selected).
- A password field with a red asterisk indicating it is a required field.
- A 'CONTINUE' button.
- A 'Forgotten your password?' link.

When registering, new users will need to accept the Terms and Conditions to access reports via the Data Portal

Exploring the Data Portal – Home

PRI signatories can **log in** to the Data Portal to view their own reports and public reports.

Please see our [Permissions System guide](#) for information on how to log in and/or register for the Data Portal.

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

The screenshot shows the PRI Data Portal interface. At the top, there is a navigation bar with links for 'Collaboration Platform', 'Data Portal', 'Reporting Tool', and 'PRI Academy'. Below this is a user profile section with a 'Hi' greeting, a dropdown menu (highlighted by an orange callout), and a 'Logout' button. The main content area features a 'PRI DATA PORTAL' header and a description of the portal's purpose. To the right, there is an 'ALL REPORTING STATS' table. An orange callout points to this table, which is also highlighted with an orange border.

ALL REPORTING STATS		
Total number of IM reporters	Total number of AO reporters	Total number of SP reporters
2244	552	301
Total reported IM AUM	Total reported AO AUM	
107.5 Trillion USD	27.7 Trillion USD	

Reporting Stats show high-level summary statistics across all signatories that reported in the current year.

Viewing Transparency Reports – “My Transparency Report”

When you click on the “Transparency Report” tab in the upper right-hand corner, you will have the option to view “My Transparency Report” and “Browse Transparency Reports”.

Under “My Transparency Report” you will see your 2021 public and private Transparency Reports.

The screenshot shows the 'My Transparency Report' page. The navigation bar at the top includes 'Home', 'Transparency Report' (highlighted), 'Assessment Report', 'Legacy Reports', and 'User Guide'. Below the navigation bar, there are two tabs: 'My Transparency Report' (highlighted) and 'Browse Transparency Reports'. The main content area is divided into a left sidebar and a main panel. The sidebar contains filters for 'Public/Private' (Public and Private selected), 'Year' (2021), 'View/Download' (All Modules selected), and 'Select Module, Section & Indicator' (Module: Organisational Over..., Section: Organisational infor..., Indicator: OO 1). The main panel features a search bar, a table of indicators, and download buttons. Annotations in orange boxes provide instructions: 'Responses are shown one module at a time – you must select a module from the **Module** dropdown menu to see responses.' (pointing to the Module dropdown), 'Scroll down the page to view all indicators of the selected module.' (pointing to the table), and 'You can also download a copy of the full report in either **PDF** or **CSV** format.' (pointing to the download buttons).

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... x

Section: Organisational infor... x

Indicator: OO 1 x

Search for an indicator

Organisation

Categorisation

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

DOWNLOADED PUBLIC AND PRIVATE REPORT (PDF)

DOWNLOADED PUBLIC AND PRIVATE DATA (CSV)

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.

You can also download a copy of the full report in either **PDF** or **CSV** format.

Viewing Transparency Reports – “My Transparency Report”

The screenshot shows the 'My Transparency Report' page. The top navigation bar includes 'Home', 'Transparency Report', 'Assessment Report', 'Legacy Reports', and 'User Guide'. The main content area is titled 'My Transparency Report' and features several filters and options:

- Public/Private:** Radio buttons for 'Public' and 'Public and Private'.
- Year (read-only):** A dropdown menu showing '2021'.
- View/Download:** Radio buttons for 'All Modules', 'Climate only', and 'Senior Leadership Statement only'.
- Select Module, Section & Indicator:** A table with columns for Module, Section, and Indicator, each with a dropdown menu and a close button (x).
- Buttons:** 'DOWNLOAD PUBLIC AND PRIVATE REPORT (PDF)' and 'DOWNLOAD PUBLIC AND PRIVATE DATA (CSV)'.

Callout boxes provide additional information:

- Public 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.
- Year Field:** The Year field is read-only. Private reports from 2014 to 2020 (if applicable) are available in the “Legacy Reports” tab. Public reports from 2014 to 2020 are available on our [website](#).
- View/Download Options:** The report View/Download options will differ based on what type of signatory you are.
 - *Investors’ reports generate **Climate Only** and **Senior Leadership Statement Only** reports.
 - **Service providers’ reports do not generate additional reports.

*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.

Viewing Transparency Reports – “Browse Transparency Reports”

When you click on the “Transparency Report” tab in the upper right-hand corner, you will have the option to view “My Transparency Report” and “Browse Transparency Reports”.

Under “Browse Transparency Reports” you can view all signatories’ public 2021 reports.

The screenshot shows a web interface for viewing transparency reports. The top navigation bar includes links for Home, Transparency Report, Assessment Report, Legacy Reports, and User Guide. The 'Transparency Report' tab is active. Below the navigation bar, there is a 'SELECT A SIGNATORY' button. A callout points to this button with the text: 'Click on "Browse Transparency Report" to see other signatories' public 2021 reports'. Below the button, a message states 'No signatory selected' and 'To view this page, please select a signatory.' A dialog box titled 'Select a Signatory' is open, showing radio buttons for 'Investors' (selected) and 'Service Providers', and a dropdown menu labeled 'Select...'. A callout points to the dialog box with the text: 'Click "Select a signatory" and a dialogue box will appear'. Another callout points to the dropdown menu with the text: 'Choose between "investors" or "service providers" and select a signatory from the dropdown menu'.

Public reports from 2014 to 2020 are available on our [website](#).

Assessment Report – “My Assessment Report”

When you click on the “Assessment Report” tab in the upper right-hand corner, you will see your confidential 2021 Assessment Report. Assessment Reports are generated **only for investors (asset owner and investment manager signatories)**.

Click the "Assessment Report" tab to see your 2021 scores

The screenshot shows the 'My Assessment Report' page. The navigation bar at the top includes 'Home', 'Transparency Report', 'Assessment Report' (highlighted), 'Legacy Reports', and 'User Guide'. Below the navigation bar, the page title 'My Assessment Report' is displayed. A callout points to the 'Assessment Report' tab in the navigation bar. Another callout points to the '2021' year selector, noting that the 'Year' field is read-only and that private reports from 2014 to 2020 are available in the 'Legacy Reports' tab. A third callout points to the 'EXPORT ASSESSMENT REPORT' button, stating that the full 2021 Assessment Report can be exported in PDF. A fourth callout points to the 'Table of contents' section on the left, which includes 'Introduction' and 'Organisational Overview'. The 'Introduction' section contains text about the assessment report's purpose and confidentiality. The 'Organisational Overview' section provides an overview of the main characteristics of the organisation, including signatory category, type, geography, and size.

The Year field is read-only.

Private reports from 2014 to 2020 (if applicable) are available in the “Legacy Reports” tab.

You can export the full 2021 Assessment Report in PDF

Select the module scorecard you want to view from the **Table of contents**

“My Assessment Report” – Introduction

This page provides an introduction to your report, an overview of your organisation's key characteristics, publication guidelines, and PRI disclaimer.

The screenshot shows the 'My Assessment Report' introduction page. It features a table for 'Organisation main characteristics', a section for 'PUBLICATION GUIDELINES', and a 'PRI DISCLAIMER' section. Two orange callout boxes provide additional information:

- Organisation main characteristics are determined by the signatory's response to the Organisational Overview module**: This callout points to a table with the following fields: Name, Signed PRI Initiative, Region, Country, Signatory Category, Signatory Type, and Size.
- Please read the publication guidelines before sharing your Assessment Report with clients or external stakeholders**: This callout points to the 'PUBLICATION GUIDELINES' section, which includes the following text:

In the 2021 Reporting Framework, the PRI introduced accountability measures around the accurate representation of PRI Assessment Reports externally. This came as a result of an increasing level of disclosure of PRI Assessment Results externally. Alongside the higher level of disclosure, came an increasing amount of misrepresentation. As such, the publication guidelines were developed to ensure consistent and accurate representation of PRI reporting outputs. The guidelines state that signatories should not:

 - disclose select modules scores in isolation (e.g. disclosing higher-scoring modules without disclosing lower-scoring modules).
 - disclose scores that from selected parts of modules only (e.g. disclosing about 50% of the scores).
 - present any scores/grades/classification generated internally or by a third party (e.g. scores).

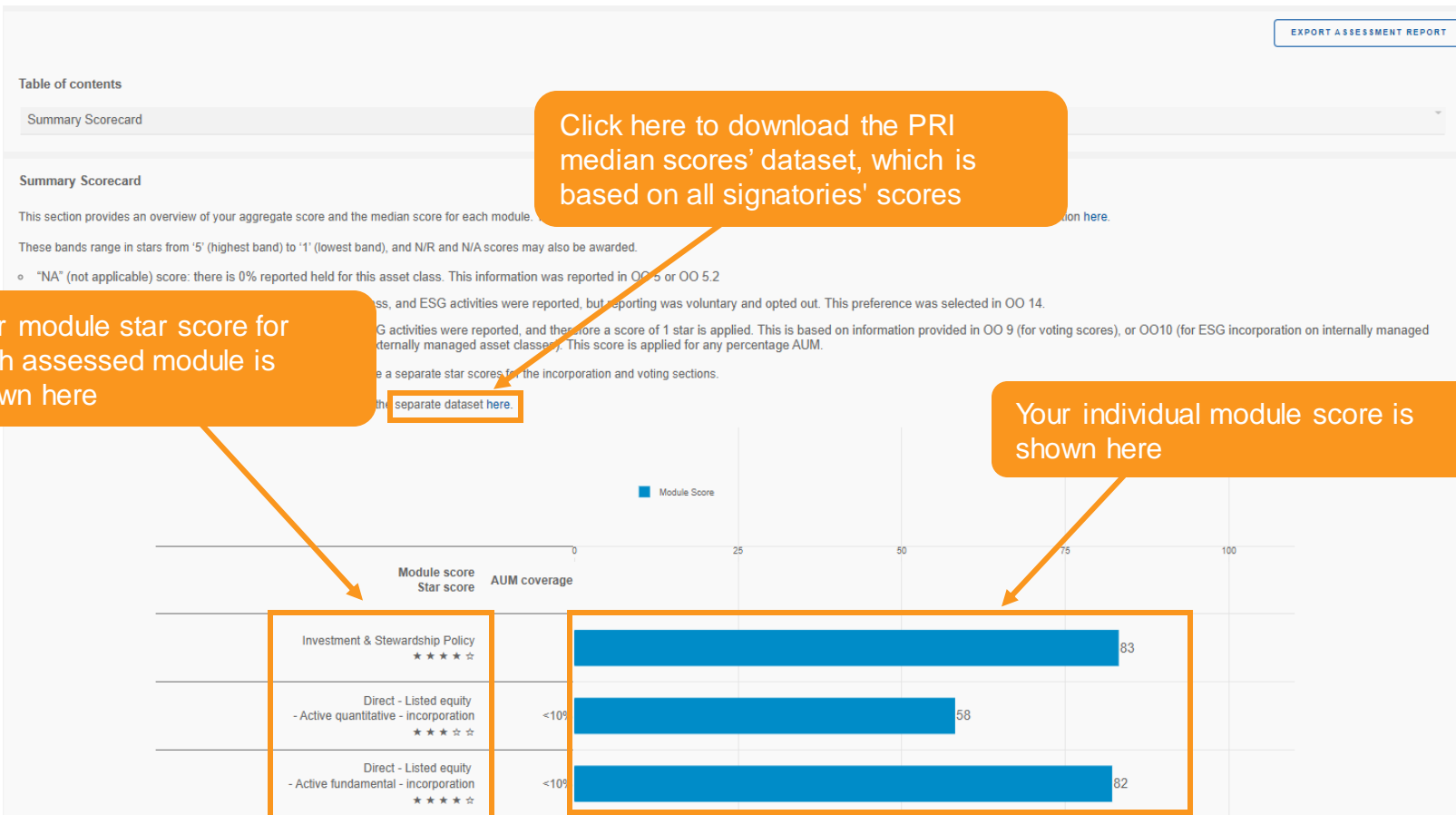
Publication of any part of an Assessment Report must be accompanied by access to the full Assessment Report and Transparency Report.

 - Assessment Report
 - Transparency Report

Assessment Reports are the intellectual property of PRI. Under no circumstances, can this report or any of its contents be sold to third parties. Consent from the reporting signatory must be provided when sharing with third parties.

“My Assessment Report” – Summary scorecard

The summary scorecard provides an overview of your aggregate score. PRI does **not** provide overall scores for an organisation. More details about the high-level assessment methodology are available [here](#).



“My Assessment Report” – Module scorecard

More details about the high-level assessment methodology are available [here](#).

Section	Sub-section	Topic	Indicator	Your Score	PRI Median
Responsible investment policy & governance	Responsible investment policy	Signatories responsible investment policy	ISP 1		
Responsible investment policy & governance	Responsible investment policy	Signatories with elements of responsible investment policy	ISP 1.1		
Responsible investment policy & governance	Responsible investment policy	Signatories with public responsible policy elements	ISP 2		
Responsible investment policy & governance	Responsible investment policy				
Responsible investment policy & governance	People and capabilities	Bonuses for responsible investment practices	ISP 8.2		
Responsible investment policy & governance	People and capabilities	Frequency at which staff training for responsible investment is reassessed	ISP 9		
Responsible investment policy & governance	Strategic asset allocation	Signatories incorporating ESG factors in strategic asset allocation	ISP 10.1		

Clicking on an indicator will open more information, including your response, how the indicator was scored, and identified guidance/best practice

EXPORT ALL INVESTMENT & STEWARDSHIP POLICY SCORECARDS

Your Response

Indicator	Type of indicator	Dependent on	Gateway to	Disclosure	Subsection	PRI Principle
ISP 1	CORE	N/A	ISP 1.1, ISP 1.2	PUBLIC	Responsible investment policy	1

Does your organisation have a formal policy or policies covering your approach to responsible investment? Your approach to responsible investment may be set out in a standalone guideline, covered in multiple standalone guidelines or be part of a broader investment policy. Your policy may cover various responsible investment elements such as stewardship, ESG guidelines, sustainability outcomes, specific climate-related guidelines, RI governance and similar.

(A) Yes, we do have a policy covering our approach to responsible investment
 (B) No, we do not have a policy covering our approach to responsible investment

Please attach the document (Stafford Capital Partners Survey only).

Guidance and Best Practices

Methodology	Best Practices
100 points for this indicator. 0 score for no answer selection or B. 100 score for A. High x2 weighting.	It is crucial for signatories to have a policy covering their responsible investment approach. It constitutes a formal commitment to responsible investment and serves as a starting point for discussions on how signatories should incorporate ESG into decision-making and stewardship. For further guidance see: 1. An introduction to responsible investment: policy, structure and process 2. Investment policy: process and practice 3. Minimum requirements for investor membership

You can export module scorecards in PDF

Legacy Reports

When you click on the “Legacy Reports” tab in the upper right-hand corner, you can see all of your historic public and private reports from 2014 to 2020, and the full dataset of public responses from 2014 to 2020.

Legacy Reports show all previously submitted historic reports from 2014 to 2020, downloadable in PDF**

Home Transparency Report Assessment 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	Download	Download	Unavailable	Unavailable	Download	Download	Unavailable	Unavailable
2015	Download	Download	Unavailable	Unavailable	Download	Download	Unavailable	Unavailable
2016	Download	Download	Unavailable	Unavailable	Download	Download	Unavailable	Unavailable
2017	Download	Download	Unavailable	Unavailable	Download	Download	Unavailable	Unavailable
2018	Download	Download	Unavailable	Unavailable	Download	Download	Download	Download
2019	Download	Download	Unavailable	Unavailable	Download	Download	Download	Download
2020	Download	Download	Download	Download	Download	Download	Download	Download

You can also download the full dataset of historic public responses in CSV*

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.

*This includes all signatories that reported to the PRI in the specific reporting cycle

**Please note that due to changes in the 2021 scoring methodology, scores for the 2021 reporting cycle are not comparable to those of previous years. See our high-level assessment methodology [here](#) for more information.

User Guide

The screenshot shows the top navigation bar of the Data Portal website. The navigation menu includes the following items: Home, Transparency Report, Assessment Report, Legacy Reports, and User Guide. The 'User Guide' tab is highlighted with an orange border. Below the navigation bar, the main content area features a blue header with the PRIMA logo (Principles for Responsible Investment) on the left and logos for UN Finance and the United Nations Global Compact on the right. The main heading reads 'Data Portal user guide'. An orange callout box with a white background and a black border contains the text: 'Return to this user guide at any point by clicking on the "User Guide" tab'. An orange arrow points from the callout box to the 'User Guide' tab in the navigation menu.

Home Transparency Report Assessment Report Legacy Reports **User Guide**

PRIMA Principles for Responsible Investment

UN FINANCE United Nations Global Compact

Data Portal user guide

Return to this user guide at any point by clicking on the "User Guide" tab

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](#).