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 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.

Viewing Transparency Reports

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

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.

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

Click the “download report” button to download full report in PDF.
Viewing Transparency Reports

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

- The **Year** field is read-only.
- Public reports from 2014 to 2020 are available on our [website](#).
- 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.**

Navigate between different sections and indicators within each module.
Viewing Transparency Reports

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

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

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.

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.

**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.

- 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.

Signatory users

Reported in 2021
Viewing Transparency Reports – “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.

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.

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.

Click on "Browse Transparency Report" to see other signatories’ public 2021 reports.

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

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 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.

Organisation main characteristics are determined by the signatory's response to the Organisational Overview module.

Please read the publication guidelines before sharing your Assessment Report with clients or external stakeholders.
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](#).

### Summary Scorecard

This section provides an overview of your aggregate score and the median score for each module. More details about the high-level assessment methodology are available [here](#).

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- Summary Scorecard

#### Summary Scorecard

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<th>Module Score</th>
<th>AUM Coverage</th>
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</thead>
<tbody>
<tr>
<td>Investment &amp; Stewardship Policy</td>
<td>83</td>
</tr>
<tr>
<td>Direct - Listed equity - Active quantitative - incorporation</td>
<td>&lt;10%</td>
</tr>
<tr>
<td>Direct - Listed equity - Active fundamental - incorporation</td>
<td>82</td>
</tr>
</tbody>
</table>

Click here to download the PRI median scores' dataset, which is based on all signatories' scores.

Your module star score for each assessed module is shown here.

Your individual module score is shown here.
“My Assessment Report” – Module scorecard

More details about the high-level assessment methodology are available here.

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

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**

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

*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

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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.