

PERMISSIONS SYSTEM USER GUIDE

PRI Association

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United Nations
Global Compact

An investor initiative in partnership with UNEP Finance Initiative and UN Global Compact

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OVERVIEW

The PRI's **Permissions System** allows signatories to manage internal and external staff's access to the **Reporting Tool** and to the **Data Portal**.

The **Permissions System** was launched in response to signatories' requests for more flexibility and control over who can access their data. The new system enables signatories to set and change users' level of access to PRI's reporting platforms at any time.

How it works

Users are granted permissions by being assigned one of the following roles:

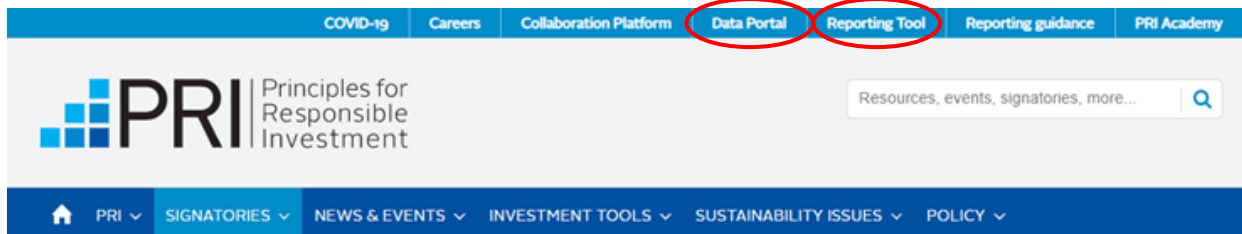
Role	Assigned by	Permissions System*	Reporting Tool**	Data Portal***
Admin	Admin	✓	✓	✓
Reporting Contributor	Admin		✓	
Data Portal Contributor	Admin			✓
Reporting and Data Portal Contributor	Admin		✓	✓

- *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.

Users cannot register themselves for the Reporting Tool or Data Portal directly – the only way to gain access to these platforms is for an Admin user at their organisation to assign them the relevant role.

LOGGING IN

Admins can access the Permissions System by logging into either the [Data Portal](#) or the [Reporting Tool](#) from [the PRI website](#), using their existing PRI login details.



You can [reset your password](#) if you have forgotten it.

Access via the Reporting Tool

When you access the Permissions System via the Reporting Tool, you will see an overview of your organisation.

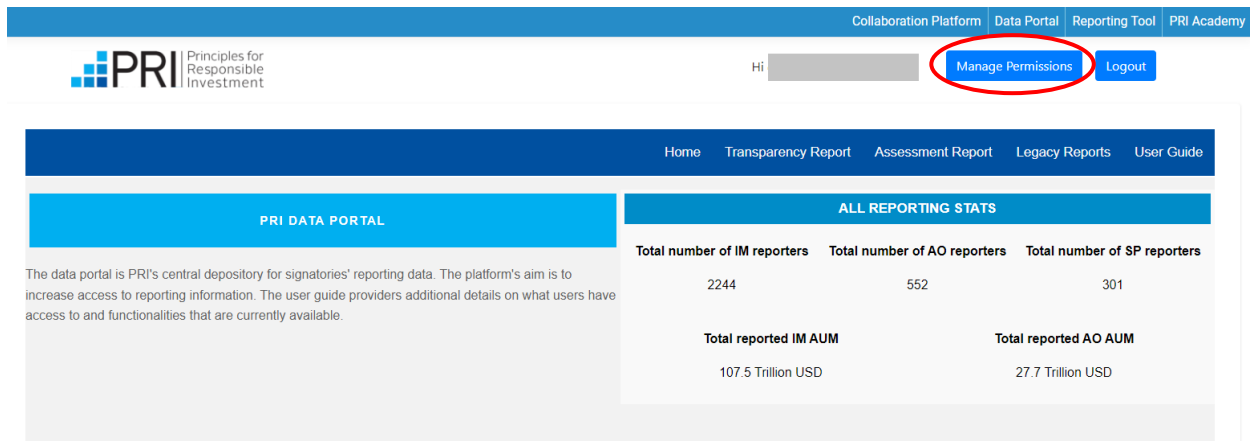
To access the Permissions System, click on the “Users/Roles” tab.

A screenshot of the PRI Reporting Tool interface. The top left shows the PRI logo and 'Principles for Responsible Investment'. The top right shows 'Signatory Info / Permissions', 'Hi Martin', and a dropdown menu for 'Partners'. Below this is a navigation bar with three tabs: 'SIGNATORY INFORMATION', 'USERS / ROLES', and 'CHANGE HISTORY'. The 'USERS / ROLES' tab is circled in red. Below the navigation bar is a signatory overview card. The card contains the following information: Signatory Category: Investment Manager; Country: France; Signatory Type: Execution and advisory services; Fund Management; Region: Europe; AUM (\$bn): 3.8618; Created On: 2004-03-12T00:00:00; Currency: EUR; Number of Active Users: 5. At the bottom left of the card is a blue button labeled 'VIEW SURVEY'. There are two red-bordered text boxes with annotations. The first box, located to the right of the navigation bar, says: 'If you are affiliated with more than one organisation you can switch between them using this dropdown menu.' The second box, located below the 'VIEW SURVEY' button, says: 'You can access this organisation's survey in the Reporting Tool by selecting the 'view survey' button (only when the reporting cycle is open).'

Access via the Data Portal

When you access the Permissions System via the Data Portal, you will see an overview of reporting statistics.

To access the Permissions System, click on the “Manage Permissions” button.

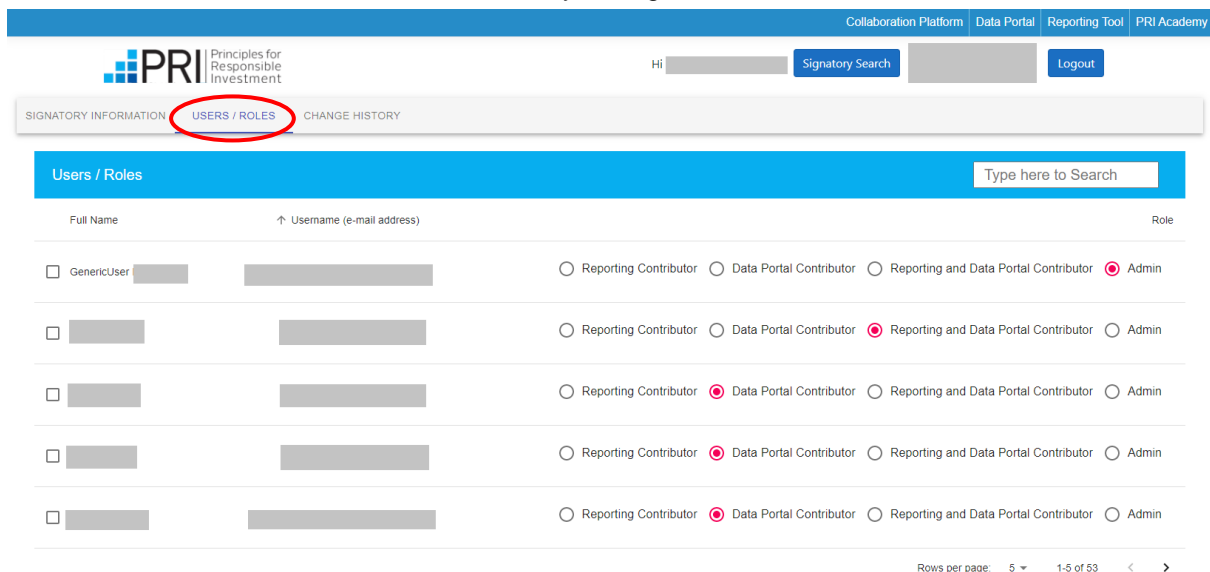


The screenshot shows the top navigation bar with links for Collaboration Platform, Data Portal, Reporting Tool, and PRI Academy. The user is logged in as 'Hi [redacted]'. A red circle highlights the 'Manage Permissions' button. Below the navigation bar, there is a main menu with 'Home', 'Transparency Report', 'Assessment Report', 'Legacy Reports', and 'User Guide'. The main content area is divided into two sections: 'PRI DATA PORTAL' and 'ALL REPORTING STATS'. The 'PRI DATA PORTAL' section contains a brief description of the portal's purpose. The 'ALL REPORTING STATS' section displays a table with reporting statistics.

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

MANAGING USERS

Select the “Users/Roles” tab to see all users in your organisation, and their levels of access.



The screenshot shows the 'Users / Roles' management interface. The top navigation bar includes 'Collaboration Platform', 'Data Portal', 'Reporting Tool', and 'PRI Academy'. The user is logged in as 'Hi [redacted]'. A red circle highlights the 'USERS / ROLES' tab. Below the navigation bar, there is a main menu with 'SIGNATORY INFORMATION', 'USERS / ROLES', and 'CHANGE HISTORY'. The main content area is titled 'Users / Roles' and features a search bar. Below the search bar, there is a table listing users and their roles.

Full Name	Username (e-mail address)	Role
<input type="checkbox"/> GenericUser [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input checked="" type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input checked="" type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin

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HOW TO GRANT ACCESS TO A NEW USER

From the “Users/Roles” tab, select the “Invite user(s)” button at the bottom of the screen, enter the user’s email address and select the role(s) you wish them to have. They will receive an email inviting them to access the Reporting Tool, the Data Portal, or both.

If the user is already registered on the PRI website, they can use their existing credentials to log in. If not, they will be asked to register and create a password via the email invite. New users can also register initially [here](#).

Only those with an “Admin” role can invite new users via the Permissions System.

Collaboration Platform | Data Portal | Reporting Tool | PRi Academy

PRi Principles for Responsible Investment

Hi: [] Signatory Search [] Logout

SIGNATORY INFORMATION | **USERS / ROLES** | CHANGE HISTORY

Users / Roles

Full Name	↑ Username (e-mail address)	Role
<input type="checkbox"/> GenericUser []	[]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input checked="" type="radio"/> Admin
<input type="checkbox"/> []	[]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input checked="" type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> []	[]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> []	[]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> []	[]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin

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INVITE USER REVOKE ACCESS

HOW TO CHANGE AN EXISTING USER’S ACCESS LEVEL

Select the user by ticking the box to the left of their name, and tick or un-tick the relevant role. They will receive an email notifying them that their access level has been changed.

To remove a user’s access to all roles, see “How to revoke access” below.

Only those with an “Admin” role can change a users’ role via the Permissions System.

Users / Roles

Full Name	↑ Username (e-mail address)	Role
<input checked="" type="checkbox"/> GenericUser []	[]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input checked="" type="radio"/> Admin

HOW TO REVOKE ACCESS

Select the user by ticking the box to the left of their name, and click the “Revoke Access” button at the bottom of the screen. They will receive an email notifying them that their access has been revoked.

Only those with an “Admin” role can revoke a user’s access via the Permissions System.

Collaboration Platform | Data Portal | Reporting Tool | PRI Academy

Hi [redacted] [Signatory Search](#) [redacted] [Logout](#)

SIGNATORY INFORMATION | **USERS / ROLES** | CHANGE HISTORY

Users / Roles

Full Name	↑ Username (e-mail address)	Role
<input type="checkbox"/> GenericUser [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input checked="" type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input type="radio"/> Data Portal Contributor <input checked="" type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input checked="" type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin
<input type="checkbox"/> [redacted]	[redacted]	<input type="radio"/> Reporting Contributor <input checked="" type="radio"/> Data Portal Contributor <input type="radio"/> Reporting and Data Portal Contributor <input type="radio"/> Admin

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[INVITE USER](#) [REVOKE ACCESS](#)

Once access is revoked, the user will be removed from your organisation’s list of Users, and will no longer have access to your organisation’s reporting, reports, or permissions.

A record of this action will remain on the “Change History” tab.

Collaboration Platform | Data Portal | Reporting Tool | PRI Academy

Hi [redacted] [Signatory Search](#) [Manage PRI Admins](#) [Logout](#)

SIGNATORY INFORMATION | [USERS / ROLES](#) | **CHANGE HISTORY**

E-Mail Address (username)	Full Name	Description	Change Date	Changed By
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If any other organisation(s) has/have assigned the user any roles, those permissions will be unaffected.

CONTACT US

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