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OVERVIEW

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

We are launching the Permissions System 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 anyone’s level of access to their reporting data at any time.

How it works

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Assigned by</th>
<th>Permissions System*</th>
<th>Reporting Tool**</th>
<th>Data Portal***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Admin (Primary contact)</td>
<td>PRI</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Admin</td>
<td>Main Admin / Admin</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Reporting Contributor</td>
<td>Main Admin / Admin</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Data Portal Contributor</td>
<td>Main Admin / Admin</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

- *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.

Unlike previously, users cannot register themselves for the Reporting Tool or Data Portal directly – the only way to gain access to these platforms is for a Main Admin or Admin user at an organisation to assign them the relevant Role.
LOGGING IN

Main Admins and 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.

When you log into the permissions system you will see an overview of your organisation.

If you are affiliated with more than one organisation you can switch between them using this dropdown menu.

You can access this organisation's survey by selecting the 'view survey' button (only when the reporting cycle is open).
MANAGING USERS

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

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 either 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.

A Main Admin user can only be created by the PRI.
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(s). They will receive an email notifying them that their access level has been changed.

A user with no roles will default to being a “Reporting Contributor”: to remove all of a user’s Roles, see How to revoke access below.

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.

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. Only the PRI can revoke a Main Admin’s access.

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 support@unpri.org.