

# PERMISSIONS SYSTEM USER GUIDE

## TABLE OF CONTENTS

OVERVIEW.....	3
HOW IT WORKS .....	3
LOGGING IN .....	4
ACCESS THE PERMISSIONS SYSTEM.....	5
MANAGING USERS .....	6
HOW TO GRANT ACCESS TO A NEW USER .....	6
EMAIL DOMAIN VALIDATION .....	7
HOW TO CHANGE AN EXISTING USER'S ACCESS LEVEL.....	7
HOW TO REVOKE ACCESS.....	8
FREQUENTLY ASKED QUESTIONS.....	9
CONTACT US .....	10

# OVERVIEW

The Permissions System allows signatories to manage their own access to the reporting platforms (Reporting Tool and Data Portal).

The Permissions System was launched in response to signatories' requests for more flexibility and control over who can access their data. It enables signatories to set and change access to the reporting platforms at any time, for internal and external staff.

Only users with the Admin role (referred to as Admin users) can access the Permissions System to manage user access. Organisations can have multiple Admin users. If you need access to the Permissions System to manage users for your organisation, [contact an existing Admin user in your organisation](#).

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.

## HOW IT WORKS

Users are granted access to the reporting platforms 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 responses to the Reporting Framework.

\*\*\*Access to the Data Portal allows users to view and download private and public reports.

## LOGGING IN

Admin users can access the Permissions System on the [PRI Applications](#) page, using their existing PRI login details.



## PRI Applications

<p><b>Collaboration Platform</b></p> <p>A unique forum that allows investors to pool resources, share information and enhance their influence on ESG issues.</p> <p><a href="#">COLLABORATION PLATFORM &gt;&gt;</a></p>	<p><b>Data Portal</b></p> <p>PRI's central repository for reporting data. Public users can search and view signatories' Transparency Reports. Additional analytical functionalities and insight are available to signatory users.</p> <p><a href="#">DATA PORTAL &gt;&gt;</a></p>
<p><b>Reporting Tool</b></p> <p>A bespoke interface that enables PRI signatories to report in detail on their responsible investment practices. The Reporting Tool is only open during live reporting windows.</p> <p>Reporting cycle opens in: 33 days</p>	<p><b>Permissions System</b></p> <p>Admin users only. The user management system developed to enable PRI signatories to manage access to the Reporting Tool and Data Portal for their organisation.</p> <p><a href="#">PERMISSIONS SYSTEM &gt;&gt;</a></p>

[Reset your password](#) if you have forgotten it.

## ACCESS THE PERMISSIONS SYSTEM

When you log in to the Permissions System, you will see an overview of your organisation on the “Users/Roles” tab.

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

If you access the PRI's Permissions System on behalf of more than one signatory, you can switch between organisations using the drop-down box at the top of the page.

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

# MANAGING USERS

The “Users/Roles” tab displays all users in your organisation, and their levels of access.

The screenshot shows the PRI website's "Users/Roles" management interface. At the top, there is a navigation bar with the PRI logo and the text "Principles for Responsible Investment". To the right, there is a user profile section with "Hi [redacted]", a "Manage Permissions" button, and a "Logout" button. Below this, there is a tabbed interface with "USERS / ROLES" selected and "CHANGE HISTORY" as an alternative tab. A blue header bar displays "Active Users: 3" and a "Search User" input field. The main content is a table with the following columns: "Full Name", "Username (e-mail address)", and "Role". There are three rows of users. Each row has a checkbox on the left and a set of radio buttons for roles on the right. The roles are "Reporting Contributor", "Data Portal Contributor", "Reporting and Data Portal Contributor", and "Admin". In the first row, the "Admin" role is selected. In the second row, the "Reporting and Data Portal Contributor" role is selected. In the third row, the "Admin" role is selected.

Full Name	Username (e-mail address)	Role
[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
[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
[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

## HOW TO GRANT ACCESS TO A NEW USER

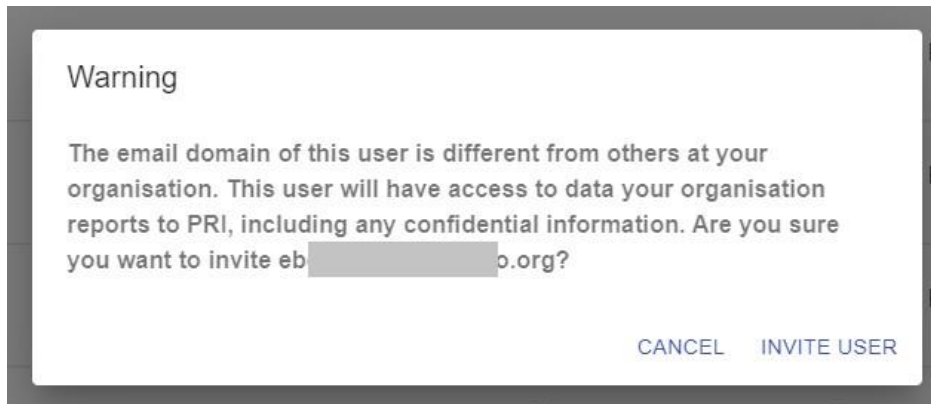
From the “Users/Roles” tab, select the “Invite user(s)” button at the bottom of the screen, enter the user’s email address and select the role(s) you wish them to have. They will receive an email inviting them to access the Reporting Tool, the Data Portal, or both.

If the user is already registered on the PRI website, they can use their existing credentials to log in. If they are not already registered, the email will also invite them to register and create a password. After registering, it can take a couple of hours before new users can access their account.

This screenshot shows the same PRI "Users/Roles" management interface as above. The "USERS / ROLES" tab is selected. At the bottom of the page, there is a navigation bar with two buttons: "INVITE USER" and "REVOKE ACCESS". The "INVITE USER" button is highlighted with a red box. To the right of the buttons, there is a "Rows per page: 5" dropdown menu and a "1-3 of 3" pagination indicator.

## EMAIL DOMAIN VALIDATION

If the user you are inviting has a different email domain from the one your organisation registered with the PRI, you will receive a warning message.

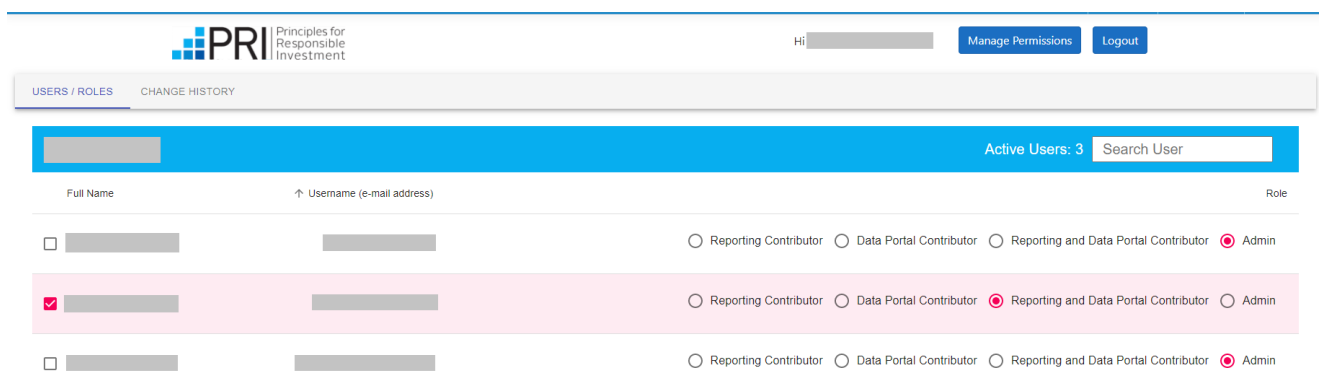


We recommend caution when inviting users that do not have a matching email domain to your organisation.

## HOW TO CHANGE AN EXISTING USER'S ACCESS LEVEL

Select the user you want to update by ticking the box to the left of their name. Then, click the radio button next to the relevant role to add or remove access. They will receive an email confirming their access level has been changed and which Admin made the change in the Permissions System.

To remove a user's access to all roles, see [How to revoke access](#) below.



The screenshot shows the PRI user management interface. At the top left is the PRI logo (Principles for Responsible Investment). To the right, there is a user profile section with "Hi [redacted]" and buttons for "Manage Permissions" and "Logout". Below this is a navigation bar with "USERS / ROLES" and "CHANGE HISTORY". The main content area has a blue header with "Active Users: 3" and a "Search User" input field. Below the header is a table with columns for "Full Name", "Username (e-mail address)", and "Role". The table contains three rows. The second row is highlighted in pink and has a checked checkbox in the first column. The roles listed are "Reporting Contributor", "Data Portal Contributor", "Reporting and Data Portal Contributor", and "Admin".

Full Name	Username (e-mail address)	Role
[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
[redacted]	[redacted]	<input checked="" 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
[redacted]	[redacted]	<input type="checkbox"/> <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 confirming their access has been revoked and which Admin made the change in the Permissions System.

The screenshot shows the PRI (Principles for Responsible Investment) Users/Roles management interface. At the top, there is a header with the PRI logo and the text 'Principles for Responsible Investment'. To the right of the header, there is a user profile section with 'Hi [redacted]' and two buttons: 'Manage Permissions' and 'Logout'. Below the header, there are two tabs: 'USERS / ROLES' and 'CHANGE HISTORY'. The 'USERS / ROLES' tab is active, showing a list of users. The list has columns for 'Full Name', 'Username (e-mail address)', and 'Role'. There are three users listed. The second user is selected, indicated by a red checkmark in a box to the left of their name. The roles for each user are: Reporting Contributor, Data Portal Contributor, Reporting and Data Portal Contributor, and Admin. The 'Admin' role is selected for all three users. At the bottom of the interface, there are two buttons: 'INVITE USER' and 'REVOKE ACCESS'. The 'REVOKE ACCESS' button is highlighted with a red border.

Once access is revoked, the user will be removed from your organisation’s list of users. They will no longer have access to your organisation’s records in the Reporting Tool, Data Portal, or Permissions System.

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

The screenshot shows the PRI (Principles for Responsible Investment) Change History tab. At the top, there is a header with the PRI logo and the text 'Principles for Responsible Investment'. To the right of the header, there is a user profile section with 'Hi [redacted]' and a dropdown menu. Below the header, there are two tabs: 'USERS / ROLES' and 'CHANGE HISTORY'. The 'CHANGE HISTORY' tab is active, showing a table of changes. The table has columns for 'E-Mail Address (username)', 'Full Name', 'Description', 'Change Date', and 'Changed By'. There is one row of data in the table.

If any other organisation(s) has/have assigned the user any roles, those permissions will be unaffected.



# FREQUENTLY ASKED QUESTIONS

## I want access to the Permissions System. Who is my Admin user?

For signatories reporting for the first time in 2024, the 'primary' or 'main' PRI contact for your organisation will be your Admin user by default. You can request access to the PRI's reporting platform by contacting them.

If you are unable to identify your Admin user, please contact [reporting@unpri.org](mailto:reporting@unpri.org).

## I tried to log in and received the error 'Not Authorized'.

Users receive this error when their account or permissions are incomplete:

1. You may not have a PRI account. Please check that you have registered for a PRI account at <https://account.unpri.org/register>.
2. You may need to [reset your password](#).
3. You may not have been granted access to the platform you are trying to access. Please contact your Admin user.

## I tried to log in and received the error 'Email address is not associated with a live UNPRI account'.

Users receive this error when their account or permissions are incomplete:

- You may not have been granted access to the platform you are trying to access. Please contact your Admin user.
- You may not have a PRI account. Please check that you have registered for a PRI account at <https://account.unpri.org/register>.
- You may need to [reset your password](#).
- Your email domain is different to the one(s) recorded for your organisation with the PRI. Please contact your Admin user who can grant you access to PRI's reporting platforms.
- Your organisation is not yet an approved signatory. You are not able to access the signatory-only areas of the PRI's reporting platforms.

## I tried to log in and the page is blank/ not loading.

We recommend trying the following:

1. Try logging in using a different browser.
2. Perform a hard refresh of the page:
  - Chrome, Firefox or Edge for Windows: Press **Ctrl+F5**, **Shift+F5** and/or **Ctrl+Shift+R**
  - Chrome or Firefox for Mac: Press **Shift+Command+R**

3. Clear your cache and cookies. Please see the following instructions for your specific browser: [Google Chrome](#), [Firefox](#), [Microsoft Edge](#) or [Safari](#).
4. If this still does not solve your issue, please email [reporting@unpri.org](mailto:reporting@unpri.org) with a screenshot of the page and we can assist you further.

## CONTACT US

If you have any questions not covered by this user guide, please contact us at [reporting@unpri.org](mailto:reporting@unpri.org).