PERMISSIONS SYSTEM USER GUIDE

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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.
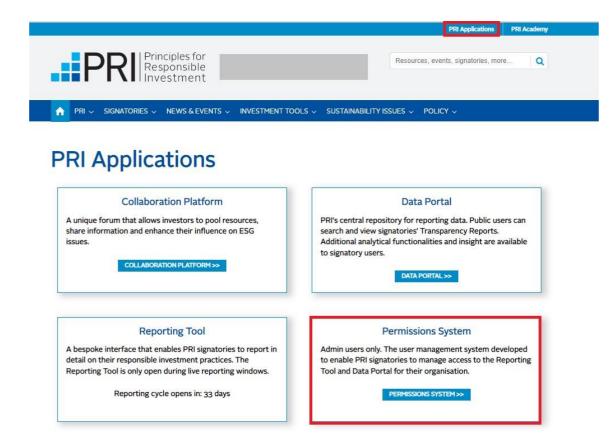
**Access to the Reporting Tool allows users to view, edit and submit responses to the Reporting Framework.

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

LOGGING IN

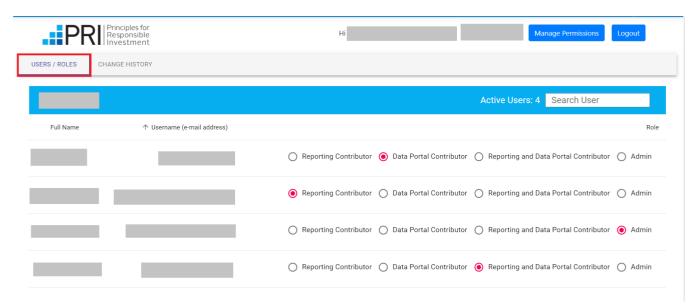Admin users can access the Permissions System on the PRI Applications page, using their existing PRI login details.

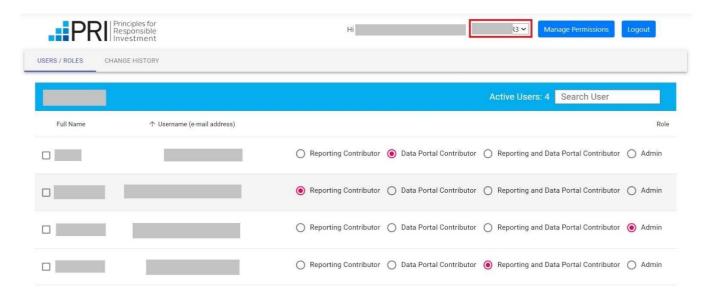Reset your password if you have forgotten it.

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.
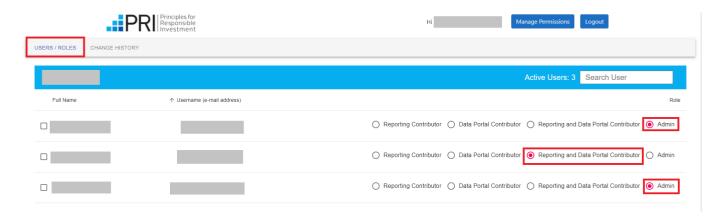

If you access the PRI's Permissions System on behalf of more than one signatory, you can switch between organisations using the drop-down box at the top of the page.
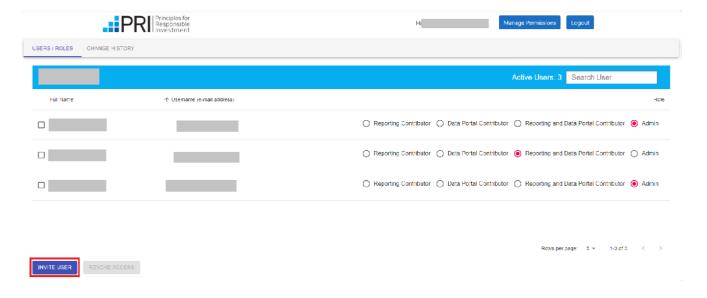
MANAGING USERS

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

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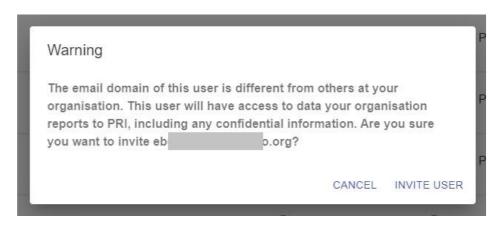
If the user is already registered on the PRI website, they can use their existing credentials to log in. If they are not already registered, the email will also invite them to register and create a password. After registering, it can take a couple of hours before new users can access their account.

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.
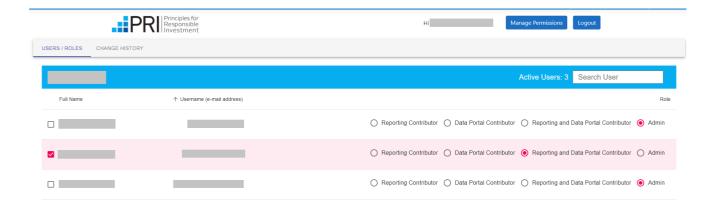

We recommend caution when inviting users that do not have a matching email domain to your organisation.

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.
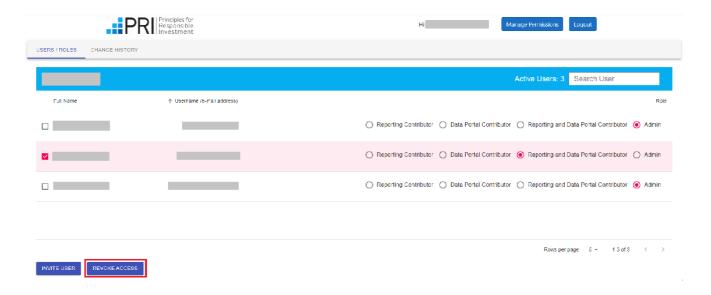
To remove a user's access to all roles, see How to revoke access below.

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.

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.

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.

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 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.