

“Share Page” Process Guide

Step-by-step guide on how to share an indicator page on the Reporting Tool with an individual that does not have access to the Reporting Tool

January 2018

Share Page Function Guidance

Signatories are now able to give “guest” access to specific indicator pages with anyone who is not already registered for Reporting Tool access.

This could be useful where:

- You want to limit their editing to parts of the Reporting Framework (a question or a module)
- The other person doesn’t have a www.unpri.org login or cannot login because they are “external” (not part of your organisation)

An email is sent to the guest, with a link to the specific indicator page, in addition to a temporary password they must use to access the Reporting Tool. Note: this password is random and temporary

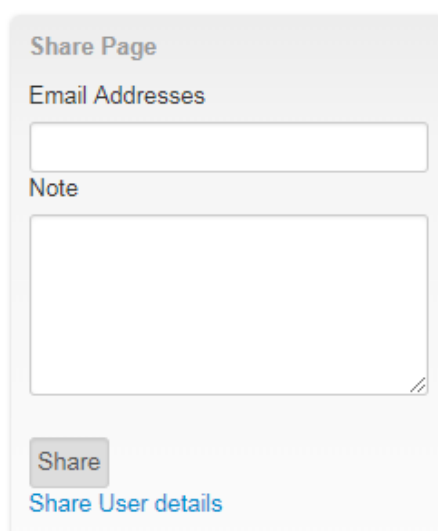
Once logged in to the Reporting Tool, the guest is able to access the indicator page in the reporting tool, enter responses and save them. The guest cannot submit a module or the report. Only registered reporting tool users can submit modules and the report.

This share function allows guests to access the specific pages the registered user has shared only; no other pages are accessible to the external individual.

Steps

Steps for Reporting Tool users to share indicators pages with external individuals are as follows;

1. *Share page function box is on right side of the Online Reporting Tool.*



The image shows a screenshot of a 'Share Page' dialog box. At the top, it is titled 'Share Page'. Below the title, there is a section labeled 'Email Addresses' with a single-line text input field. Underneath that is a section labeled 'Note' with a larger, multi-line text area. At the bottom left of the dialog, there is a 'Share' button. At the bottom right, there is a blue link that says 'Share User details'.

- To share a single indicator page; select the indicator page, enter the email address of the guest you wish to provide access and click the 'Share' button.

OO - Organisational Overview » Basic Information

Indicator | Explanatory notes | Definitions

OO 01 | Mandatory | Disclosure: Public | Gateway/Peering | Principle: General

Appeal approved for this indicator

OO 01.1 Select the type that best describes your organisation or the services you provide.

- Non-corporate pension or superannuation or retirement or provident fund or plan
- Corporate pension or superannuation or retirement or provident fund or plan
- Insurance company
- Foundation
- Endowment
- Development finance institution
- Reserve - sovereign or government controlled fund
- Family office
- Other. specify

OO 01.3 Additional information. [Optional]

Share Page
 Email Addresses:
 Note:
 Share
 Share User details

- To share multiple indicator pages; on the Overview page, select – by ticking the 'Share Page' boxes – the indicators you wish to share, enter email address of the guest you wish to share with and click the 'Share' button.

Overview

The 2018 Reporting Framework now offers reporters the option of reporting on PRI's new climate-related indicators. If you wish to opt into this pilot and report on climate-related financial risks please click below "Select tags"

Select tags

OO - Organisational Overview

Download Data Collection Form | Download Transparency Report (public) | Download Transparency Report (private)

Filter indicators by

	Purpose	Description	Share Page
OO Preface			<input type="checkbox"/>
OO TG			<input type="checkbox"/>
Basic Information			
OO 01	Mandatory	Signatory category and services	<input type="checkbox"/>
OO 02	Mandatory	Headquarters and operational countries	<input type="checkbox"/>
OO 03	Mandatory	Subsidiaries that are separate PRI signatories	<input type="checkbox"/>
OO 04	Mandatory	Reporting year and AUM	<input type="checkbox"/>
OO 05	Mandatory to Report, Voluntary to Disclose	Breakdown of AUM by asset class	<input type="checkbox"/>
OO 06	Mandatory	How would you like to disclose your asset class mix	<input type="checkbox"/>
OO 07	Mandatory to Report,	Environmental, Social and Governance	<input type="checkbox"/>

Share Page
 Email Addresses:
 Note:
 Share
 Share User details

Probench Managers
[Return to the manager](#)
 The survey has been modified (2018-01-18 10:34 by PRI/Eva) since this page was generated (2018-01-15 22:08).
[Regenerate this page](#)
[Mark all pages for regenerating](#)
[Generate all changed pages](#)
[Recalculate Scores](#)

The (OO) Organisational Overview module has been unconfirmed and will need to be reconfirmed to view the other modules.

4. *The guest will receive the below email with the link and temporary password. To log in to the tool, the external individual must follow the link provided. They should login with their email address and the password provided.*

Special care should be taken to make a note of this password in this email because we cannot send forgotten password reminders for guest logins.

Dear

You have been invited to contribute to a survey in the PRI Reporting Tool. Please use these links below, there will be one link per page you which you have been invited to.

You will need to login using the password below. Please take careful note of this password as for security reasons we cannot retrieve or resend this password to you.

!>9C?<As

<https://reporting.unpri.org/surveys/PRI-reporting-framework-2018/53542252-f192-4014-97cc-2ab6564e9efe>

You were invited by
Sharing Indicator Page Test

Best wishes,

Reporting & Assessment Team
reporting@unpri.org
T: [+44 \(0\) 20 3542 6341](tel:+442035426341)