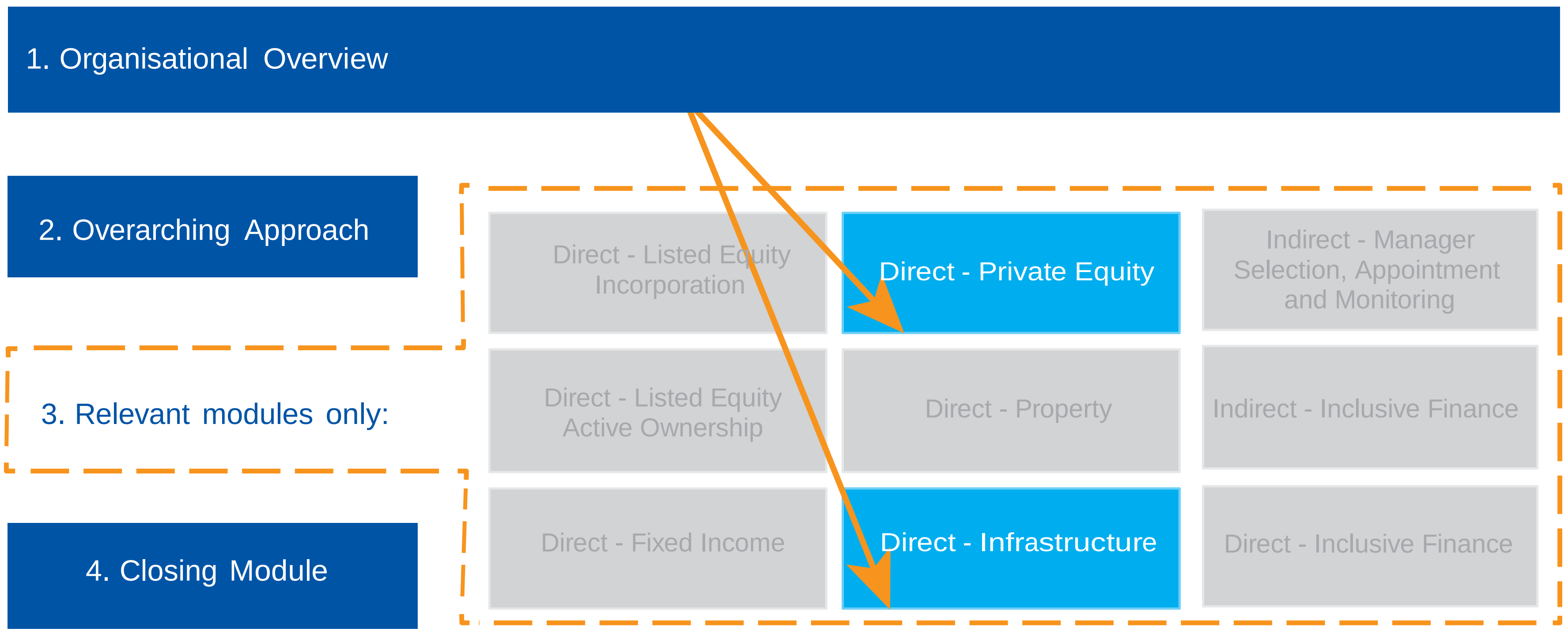
MODULES AND INDICATORS

The Reporting Framework consists of 12 different modules, of which a selection will be relevant for individual signatories. All signatories will be required to complete the Organisational Overview and the Closing Module, and most will also complete Overarching Approach. Additional modules will depend on your organisation's assets and approach. Within each module, there are a number of indicators which you must complete and other, voluntary indicators.

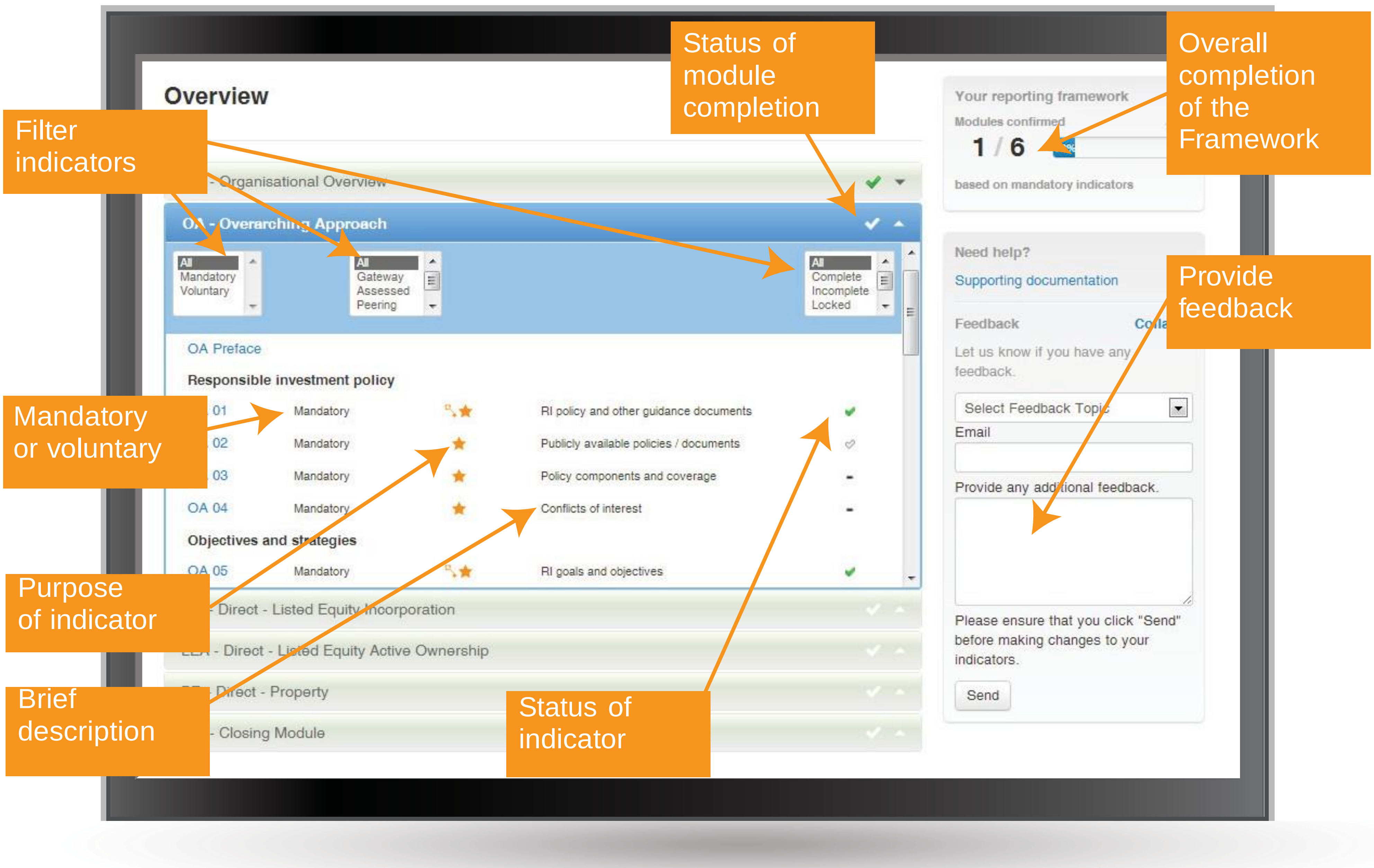
ORGANISATIONAL OVERVIEW DECIDES APPLICABLE MODULES:

The first module you must complete defines which additional modules are relevant for your organisation.
For example, if your firm primarily invests directly in private equity and infrastructure, the modules Direct – Private Equity and Direct – Infrastructure will be defined as relevant for you to complete.



OVERVIEW PAGE

This page in the online tool displays an overview of the modules that you must complete and provides you with information regarding indicators within each module.



INDICATOR DETAILS

PURPOSE

Indicators are included in the Reporting Framework for a number of reasons. The purpose of an indicator is explained through the use of the following icons:

CORE ASSESSED

These indicators form the core of the assessment, and represent the majority of your final assessment score.

ADDITIONAL ASSESSED

These indicators represent more advanced or alternative practices and contribute to a smaller part of your score.

PEERING

These indicators are used to determine your peer groups for assessment purposes.

DESCRIPTIVE

These are open-ended narrative indicators, allowing you to describe your activities.

GATEWAY

The responses to this indicator 'unlock' other indicators within a module if they are relevant for your organisation. Please refer to the logic box for more information.

STATUS

Your progress towards completing the indicators is highlighted by the following icons:

LOCKED

These indicators are 'locked', a preceding gateway indicator will determine if it is relevant for your organisation. Complete all gateway indicators to make sure all your applicable indica- tors are unlocked.

NOT YET STARTED

The response to the indicator has not been started.

INDICATOR STARTED

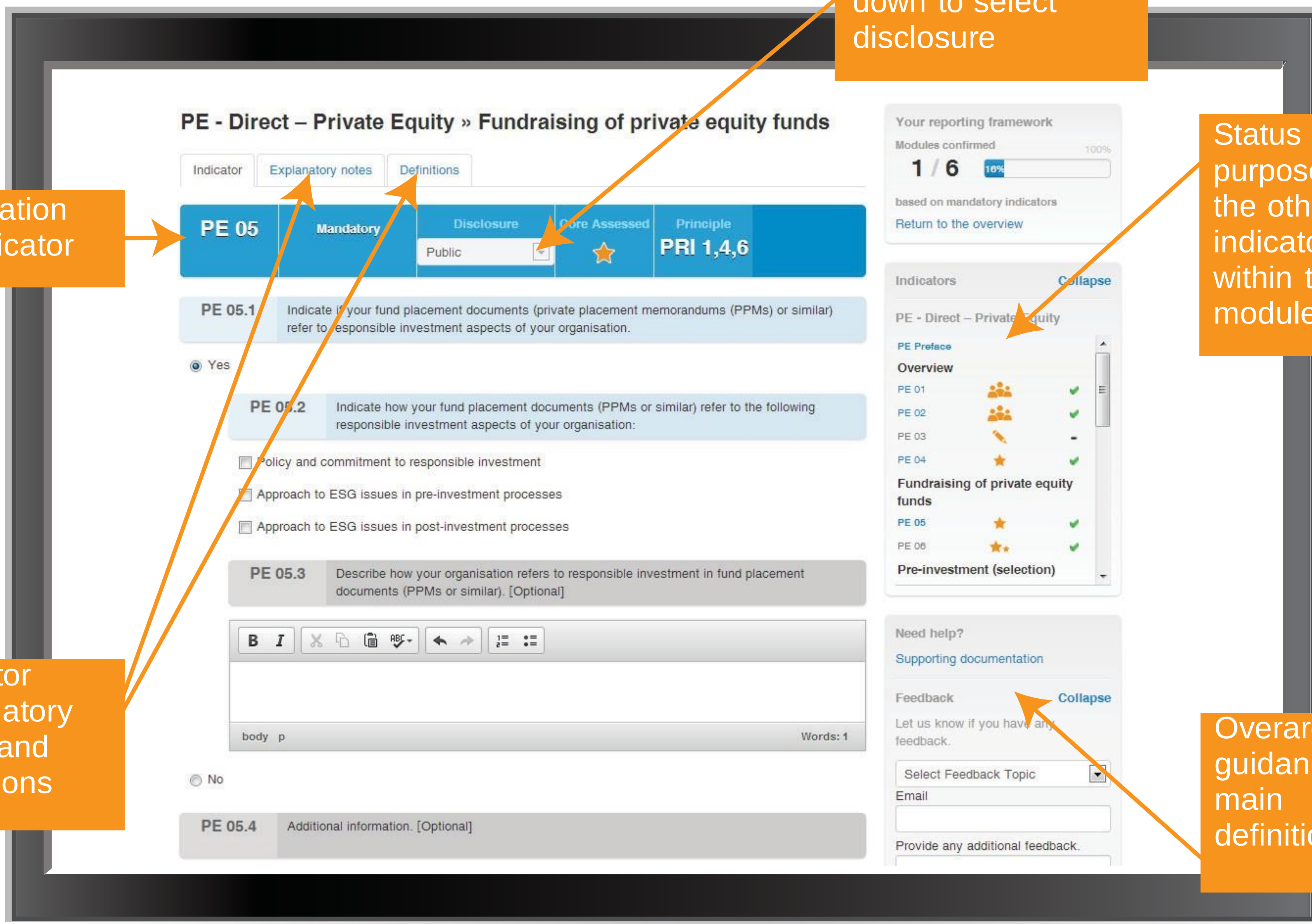
The response to the indicator has been started but not all mandatory elements have been completed yet.

INDICATOR COMPLETE

All mandatory elements of this indicator have been completed and the indicator is marked as final.

COMPLETING AN INDICATOR

In addition to the indicator itself, each indicator page contains:



For voluntary indicators, drop down to select disclosure

Information on indicator

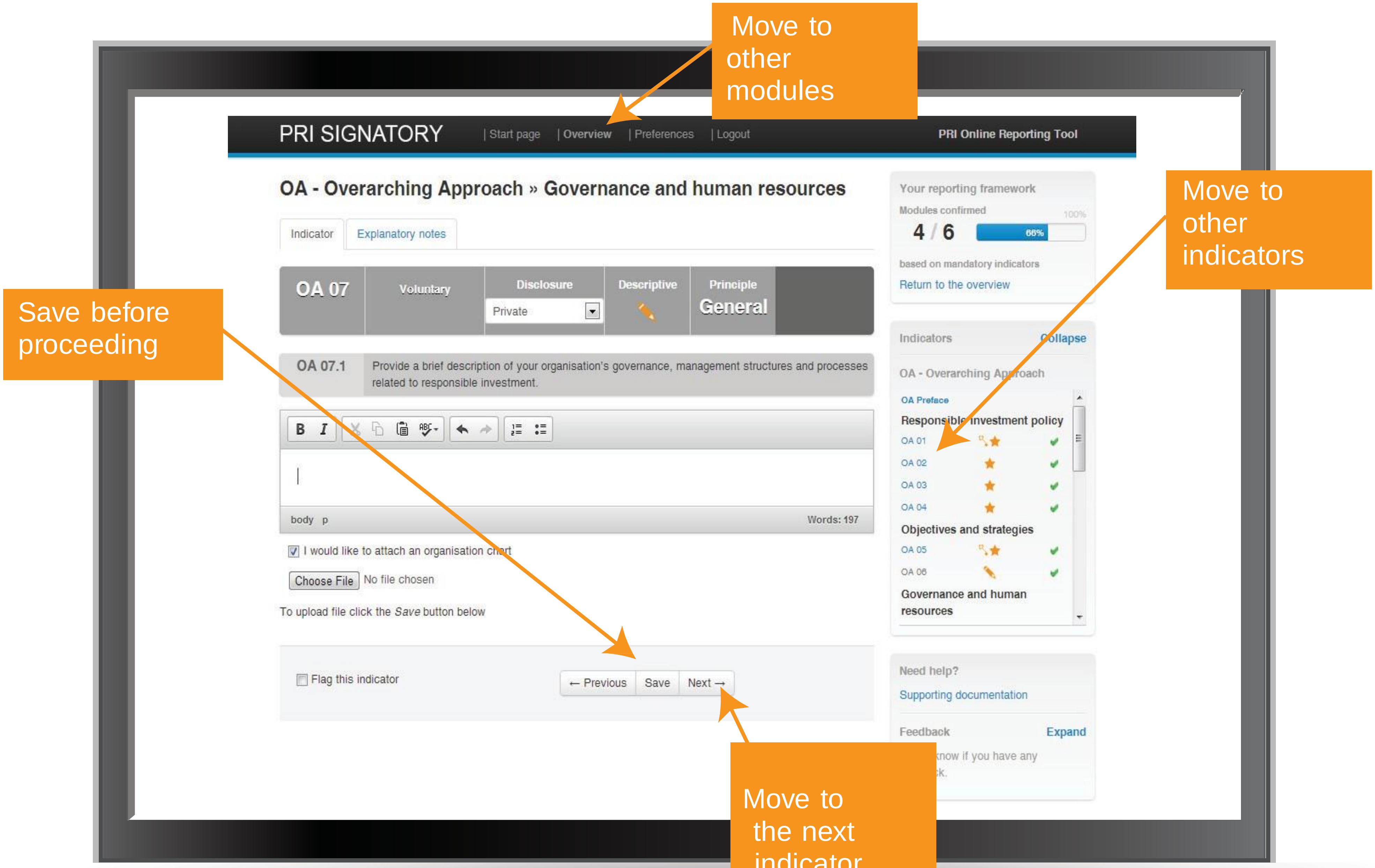
Status and purpose of the other indicators within the module

Indicator explanatory notes and definitions

Overarching guidance and main definitions

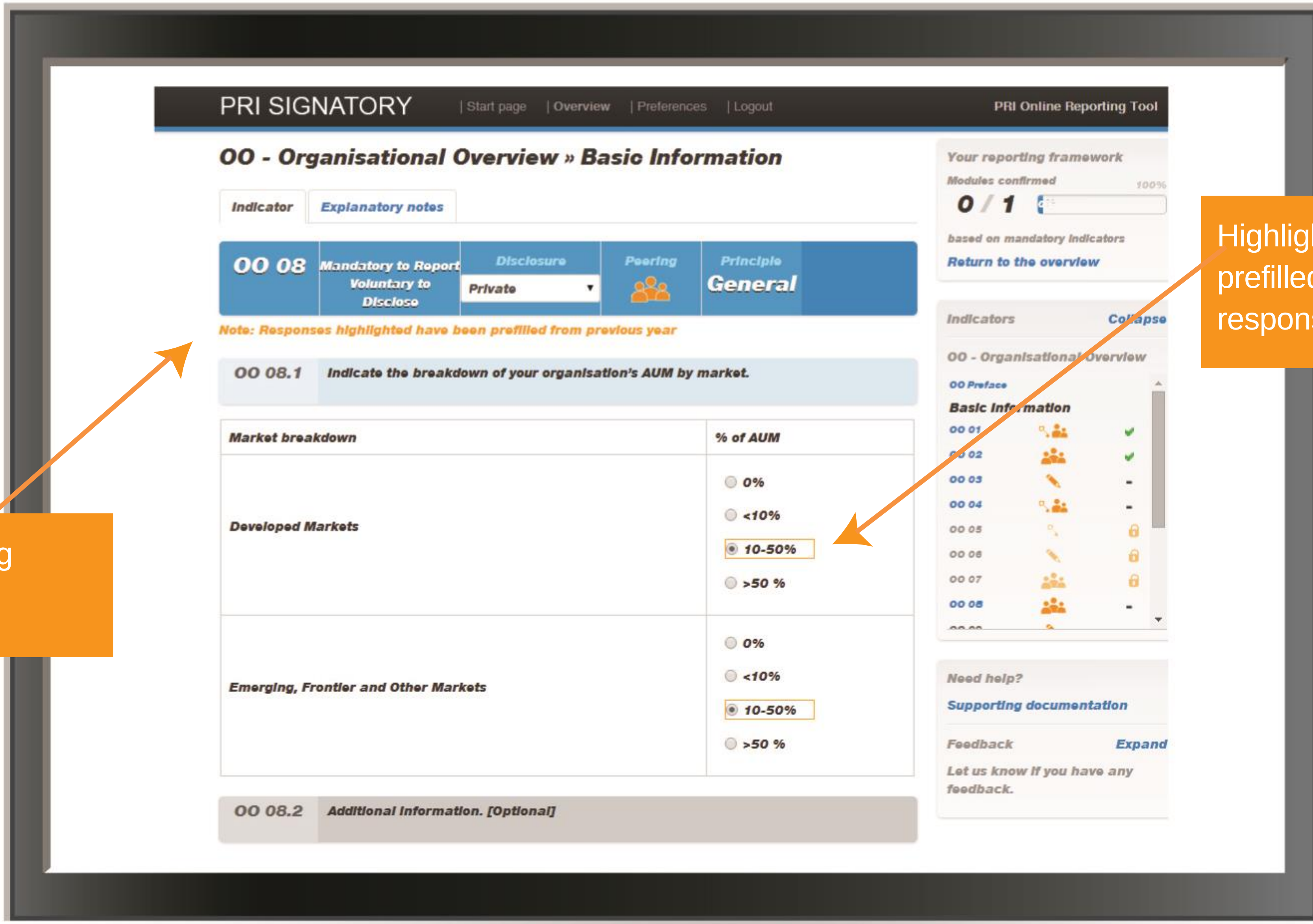
NAVIGATING BETWEEN INDICATORS

After saving an indicator, you can navigate around the Framework in 3 different ways



PREFILLING

If you reported during the 2014/15 reporting cycle, you will find your responses prefilled for most of the indicators. These will be highlighted clearly as shown below. You can switch off prefilling by going to the preferences tab.



Highlighted prefilled response

Prefilling note