

DAERA's Adaptation Reporting Portal - Quick Reference Guidance (**Version 3**)

Essential Navigation Instructions

This is a supplementary supporting document to DAERA's [Public Body Climate Change Adaptation Reporting Portal](#) and the associated guidance document, '[Climate Change Adaptation Reporting Guidance for Public Bodies](#)', and it should be read in conjunction with both.

The purpose of this document is to provide tips in relation to navigating and entering data into the online reporting portal. However, it is not a replacement for the guidance document, which contains additional information and instructions in relation to entering data into the online portal for the specific climate change adaptation questions.

PLEASE NOTE: This document is a live document and is therefore subject to change. It may be updated by DAERA periodically, when required. Please keep a note of the version number and periodically check this document [online](#) to ensure you are using the most up-to-date version.

If you have any queries regarding this document, please contact the PBR helpdesk:

Telephone: 028 9081 6611

Email: ClimatePBR@daera-ni.gov.uk

This document contains the following sections:

- [Section A: Essential Information](#)
- [Section B: Getting Started and Using the Portal - Key Points](#)

Section A: Essential Information

This section contains important information about how the portal behaves. It covers:

1. [Session timeout](#) - reduce the risk of losing unsaved data
2. [Saving answers](#) - the need for completeness and accuracy before saving
3. [Auto population](#) - links between questions and the need for completeness and accuracy
4. [Pop-up messages in Parts 3.3 and 4](#) - how the 'OK' and 'Cancel' buttons function before saving or confirming entries.

1. Session timeout - reduce risk of losing unsaved data

- The portal will **sign you out** automatically **after 60 minutes of inactivity** if you do not:
 - click the green **Save** or **Confirm** button;
 - open a link; or
 - move to another page.

The timer restarts when the portal loads a new page.

- A warning pop-up message normally appears at around **50 minutes**, stating: *"Your session is about to expire. Please save your work."*

At this point, if relevant, you have just **under 10 minutes to complete, check** your data entries, and click the green **Save** button to ensure your work is saved for that page.

The pop-up message will appear even if there is no data to save on that page. This means that if you have nothing to save, or only need to click **Confirm**, you will not lose any data if the system times out.

- **Important: If the timeout occurs** while you are entering data on a page, the portal will allow you to continue to enter that data and it will display these entries. However, because your session has expired in the background, the data you have inputted to this page pre- and post-timeout will not be saved.

When you next click a green **Save** or **Confirm** button **after a timeout**, the portal will immediately redirect you to the '**Sign in or Register**' page. Data will need to be re-entered and saved after signing back in, as appropriate.

- Please therefore **complete, check, and save entries** on each page, as appropriate, **before the 60-minute timeout occurs**.

2. Saving answers - the need for completeness and accuracy before saving

The current portal system design means:

- **Some saved entries cannot be amended once saved - they can only be deleted and re-entered**, even if the required amendment is minor.
- As the ability to edit saved entries varies across the portal, **it is important to always complete and carefully review your data entries for accuracy before** selecting the green **Save** button on a page.
- This is especially important in Part 3.3 and Part 4, where some answers are automatically copied into later questions (see point 3 below).

3. Auto population - links between questions and the need for completeness and accuracy

- Some answers you enter are automatically copied into later questions. These linked questions include:
 - **Question 3.3(a)** → auto-populates into **Question 4.2(a)** (i.e. 'Risk/Opportunity title' fields feed into the 'Risk/opportunity addressed' fields).
 - **Question 4.2(a)** → auto-populates, as appropriate into **Questions 4.3(a), 4.3(b) and 4.4(a)** (i.e. 'Action title' fields feed into all relevant NICCAP and Co-ordination questions).
- Because the entries for **these questions are linked**, please **make sure your data is complete and accurate**, and that you have no further entries to include under these questions, **before** clicking the green **Save** or **Confirm** button on the relevant pages.
- Once an **entry has been saved and confirmed** for Question 3.3(a) and/or 4.2(a), **changing it - or adding a new entry** to those questions - may **require you** to delete and re-enter one or more linked entries in

questions 4.3(a), 4.3(b) and/or 4.4(a) (i.e. if you have started to provide response details to those other questions).

- **Answer your questions** in the portal in this order:

Complete, save and confirm Question 3.3(a) → *then* complete, save and confirm **Question 4.2(a)** → *then* answer **Questions 4.3(a), 4.3(b)** and/or **4.4(a)**, as relevant.

- If you do need to update, remove, or add an entry after saving and confirming entries under Question 3.3(a) and/or 4.2(a), and experience difficulties or are unsure, contact the PBR Team for assistance at ClimatePBR@daera-ni.gov.uk or 028 9081 6611.

4. Pop up messages in Parts 3.3 and 4 - how the 'OK' and 'Cancel' buttons function - before saving or confirming entries.

When you click a green **Save** button or **Confirm** button in **Part 3.3** and **Part 4**, the portal will display a **pop-up message** asking you to **check the details you have entered** before proceeding with saving or confirming your entries.

These pop-ups messages behave as follows:

- **Clicking the white 'Cancel' button** → *Returns you to the page without saving, allowing you to review* the details you have entered *and make any further amendments*, updates or additions (e.g. spelling, titles, or other details) **before committing to saving/confirming.**
- **Clicking the blue 'OK' button** → *Saves or confirms your data entry and locks it*, meaning **it cannot be changed later**. Locked entries can **only be deleted and re-entered**, even if the amendment required, is minor.

Section B: Getting Started and Using the Portal – Key Points

This section contains important information about how the portal behaves. It covers:

- i [Registering \[New User\]](#)
- ii [Linking your account \[New User; or Current user linking to a new organisation\]](#)
- iii [Signing in](#)
- iv [Using the portal - General](#)
- v [Navigation and saving](#)
- vi [Uploading documents \(PDFs\)](#)
- vii [PDF Uploads – No Sensitive Material/Redactions](#)
- viii [Viewing an uploaded PDF document](#)
- ix [Downloading or printing a report as a PDF document](#)

i. Registering [New User]

- Click the green **‘Sign in or register’** button on the portal’s [landing page](#) to create either a **Government Gateway** or **NIDA** account using your **work email address only**. This verifies you as an authorised representative.
- **Government Gateway** is **recommended** for this service.
- If an organisation wishes to use a non-organisational email address (e.g. an external consultant), they must email the PBR helpdesk in advance at ClimatePBR@daera-ni.gov.uk to confirm that the address is authorised to act on behalf of the organisation.
- Registration and sign-in videos are available on [DAERA’s Public Body Climate Change Adaptation Reporting](#) webpage.

ii. Linking your account [New User; or Current user linking to a new organisation]

- **Your account** must be **linked** to your organisation by following a series of steps and prompts. When linking either a new or an existing account to your public body organisation, pre-approval from DAERA’s Public Body Reporting Team is required before you can proceed to the later steps and access the online portal.

- Approval is required **only once** and is confirmed by email from DAERA.
- Multiple users may be linked to one organisation; and it's recommended that each person should have **their own login details**.

iii. Signing in

- **Government Gateway:** Government Gateway user ID; password required every time you sign in.
- **NIDA:** Your work email address; password required every time you sign in.
- **Forgotten your ID or password:**
 - o *For Government Gateway*, if you cannot recover your sign-in details, you may need to create a new account using your work email address.
 - o *For NIDA*, you can reset your password; however, entering the wrong details five times will result in a 2-hour lockout.

iv. Using the portal - General

- Only **one person should edit a report at a time** to avoid overwriting or losing data.
- Check entries for **accuracy before saving/confirming**, especially where information auto-populates later questions.
- Do not click buttons repeatedly; the system may need a moment to load.

v. Navigation and saving

- Use the portal's navigation buttons (e.g. click the link titled 'Back' at the top left of each page to return to previous page).
- **Do NOT use** your browser's back arrow.
- **To prevent data loss**, make sure your entry for a question is fully completed and accurate, then scroll to the bottom of the page and click the green **Save** button before leaving the page and **within 60 minutes** of landing on that page.

vi. Uploading documents (PDFs)

- Uploads must be **PDF only**, maximum **20MB** in size. No other formats are accepted.
- You can upload **one PDF per question**.
- Only **static PDFs** are allowed. Do not upload documents containing:
 - o embedded scripts or JavaScript
 - o interactive forms or fields
 - o audio or video
 - o external auto-loading links
 - o plug-in-based features
- These types of PDFs can fail or cause system issues.

vii. PDF Uploads – No Sensitive Material/Redactions

Responsibility for Uploaded Content

- The responsibility rests with the reporting body to ensure that **only material suitable for publication** is uploaded to the portal.

Sensitive and Non-Sensitive Material

- Reporting bodies must not upload to the portal any PDF document unless they are fully content for DAERA to publish it in its entirety.

Therefore,

- **Do not upload** a redacted PDF document
- **Do not upload** a PDF document if it contains sensitive, commercially confidential, or otherwise non-publishable information.
- **Upload** either a PDF with all sensitive information fully removed (not redacted), or an alternative PDF that is fully suitable for publication.

viii. Viewing an uploaded PDF Document

- When a report is downloaded or printed from the online portal, **only titles of the uploaded PDF documents are displayed**. The points below outline how to access and view the full uploaded files within the portal itself:

- **If you have not yet submitted your report to DAERA:**
 - o Go to the relevant question within the portal (e.g. Part 2, Question 2.2(b)).
 - o Click the grey **'Download'** button view the uploaded document.

- **If you have submitted your report to DAERA:**
 - o Go to the relevant question within the portal (e.g. Part 2, Question 2.2(b)); and
 - o Click the grey **'Download'** button to view the uploaded document.

ix. Downloading or printing a report as a PDF Document

- At the bottom of the **Review Report** main page, select the grey **'View or download report'** button.
After clicking it, a summary of your organisation's adaptation report will be displayed. Please note that this may take up to a minute to load.

- Once the summary page has fully loaded, select the green **'Print or Save as a PDF'** button at the top of this page.
This will open a print preview screen. On the left-hand side under the heading **'Printer'**, you can choose either:
 - o **'Save as PDF'** to download the report to your computer, or
 - o select **your** preferred printer to print a hard copy.