



G R E S B

Portal Guide



GRESB Portal

CONTENTS

- ◆ Introduction
- ◆ Getting started
 - 0 Registration
 - 1 Logging in
 - 2 Creating an entity
- ◆ Managing Assessments
 - 3 Assessments overview
 - 4 Assessment collaborators
 - 5 Templates
 - 6 Manage entity
 - 7 Asset portal (Real Estate)
 - 8 Fund-asset links (Infrastructure)
- ◆ Assessment response
 - 9 Component selection
 - 10 Editing the response
 - 11 Purchasing additional products
 - 12 Review and submit

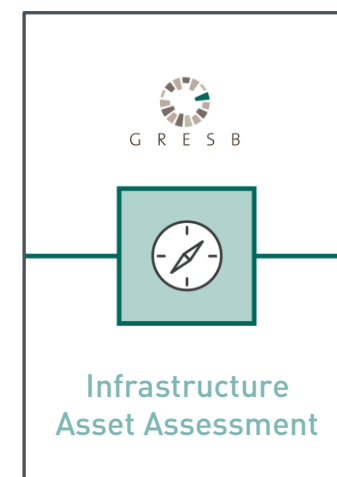
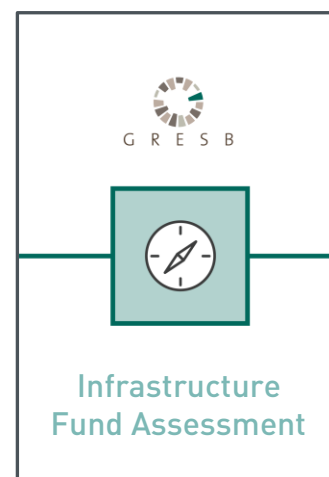
OVERVIEW

- **Introduction**
- Getting started
- Managing Assessments
- Assessment response

This is a guide for the GRESB Portal to take you through the steps needed to create a reporting entity, explain basic Portal functionalities and provide tips to streamline the reporting process.

The GRESB Portal is a collaborative work environment for companies, fund managers and asset operators reporting to the GRESB Assessments. It also provides a platform for GRESB Investor Members and participants to analyze and benchmark ESG performance.

For more in-depth information on the GRESB Assessments and indicator-specific guidance, please see:



Unless indicated otherwise, this guide applies to all GRESB Assessments.

GRESB's free online training platform



Access the Training Platform

GRESB's Helpdesk



Contact the GRESB Helpdesk

GRESB Partners



Find a GRESB Partner

Resources

You can access the free **GRESB Training Platform** directly through the GRESB website. Links to specific training videos are included throughout this guide.

For any questions from invoicing to the assessment process you can contact the **GRESB Helpdesk**.

GRESB's Partners are also able to assist with the reporting and submission process.

OVERVIEW

- Introduction
- **Getting started**
- Managing Assessments
- Assessment response

0. Registration
1. Logging in
2. Creating an entity

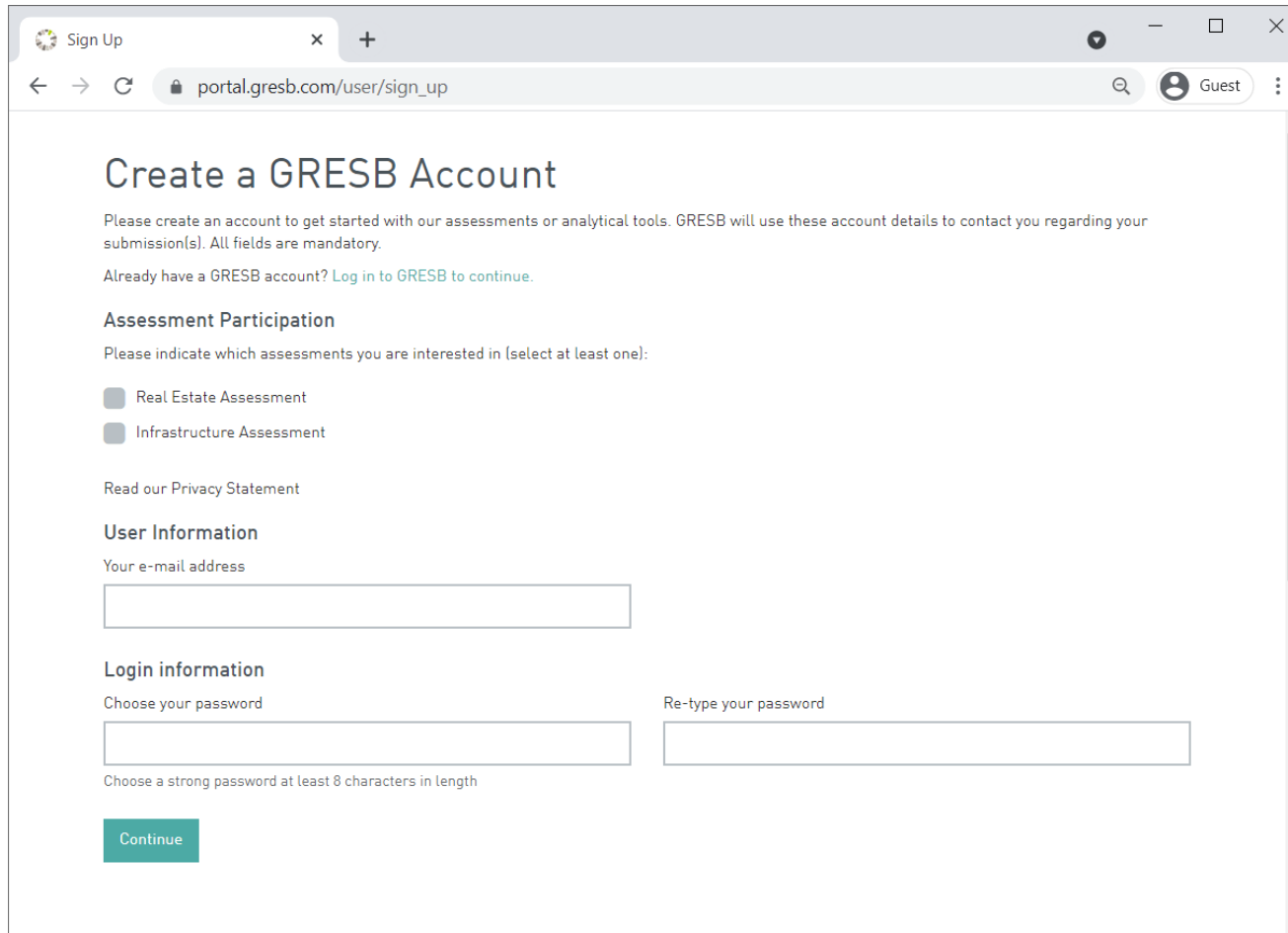


GRESB Portal

0. Registration

If you don't have a GRESB account already, you can sign up to create one for free.

You can select which Assessments you are interested in.



The screenshot shows a web browser window with the URL `portal.gresb.com/user/sign_up`. The page title is "Sign Up". The main heading is "Create a GRESB Account". Below the heading, there is a paragraph: "Please create an account to get started with our assessments or analytical tools. GRESB will use these account details to contact you regarding your submission(s). All fields are mandatory." followed by a link: "Already have a GRESB account? [Log in to GRESB to continue.](#)".

The "Assessment Participation" section asks the user to "Please indicate which assessments you are interested in (select at least one):". There are two radio button options: "Real Estate Assessment" and "Infrastructure Assessment".

Below this is a link: "Read our Privacy Statement".

The "User Information" section has a label "Your e-mail address" followed by a text input field.

The "Login information" section has two labels: "Choose your password" and "Re-type your password", each followed by a text input field. Below the first password field is a note: "Choose a strong password at least 8 characters in length".

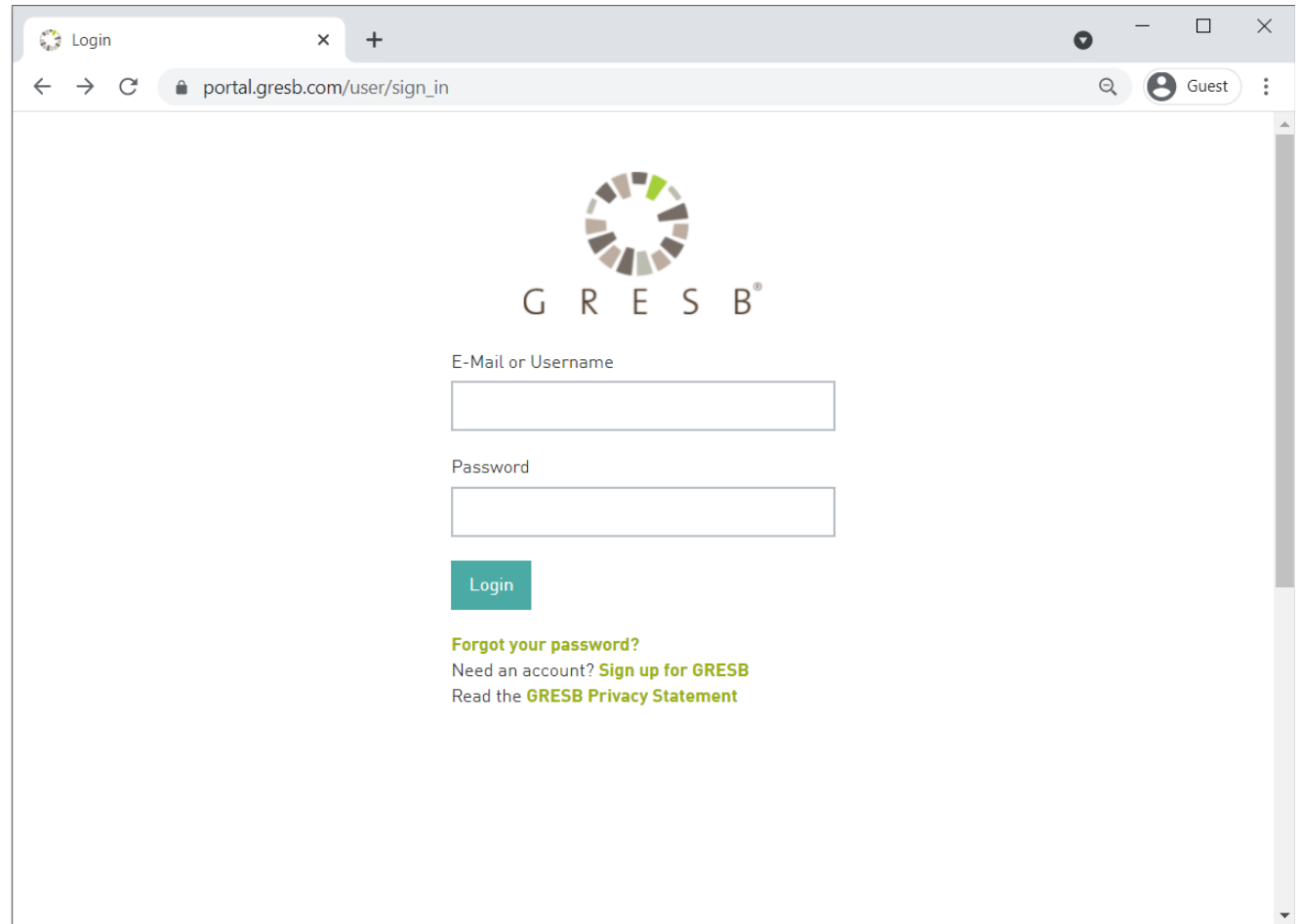
At the bottom left of the form is a green "Continue" button.



GETTING STARTED

1. Logging in

Once you've created a user account, you can log into the GRESB Portal.



The screenshot shows a web browser window with the address bar displaying "portal.gresb.com/user/sign_in". The page features the GRESB logo, which consists of a circular icon made of colored segments above the text "GRESB®". Below the logo are two input fields: "E-Mail or Username" and "Password". A teal "Login" button is positioned below the password field. At the bottom of the login section, there are three links: "Forgot your password?", "Need an account? Sign up for GRESB", and "Read the GRESB Privacy Statement". The browser's address bar also shows a "Guest" user profile.

Login

portal.gresb.com/user/sign_in

G R E S B®

E-Mail or Username

Password

Login

[Forgot your password?](#)
[Need an account? Sign up for GRESB](#)
[Read the GRESB Privacy Statement](#)

GETTING STARTED

Real Estate Entities

portal.gresb.com/real_estate/entities

Guest

G R E S B

Real Estate Infrastructure

Real Estate Entities

REPORTING ENTITY	ASSESSMENTS	ACCESS	2021 ASSESSMENT(S) STATUS	MANAGE
Real Estate Test Entity Example GRESB Test		Access	Real Estate – Provide your intent	Manage
Blackbird Test Ornithology Inc.	View assessments	Access	Real Estate – Not started	Manage

+ Create new reporting entity

NEWS 1
Check your updates →

TEMPLATES
Manage templates →

RESOURCES
View resources →

SCHEDULE
View schedule →

CASE STUDIES
Submit a case study →

1. Logging in

- Each entity that you have access to is shown on the Assessment Portal landing page
- Updates from GRESB can be found under **News**.
- Any templates can be accessed via **Templates**.
- Guidance materials are found under **Resources**.
- The Assessment timeline is available via **Schedule**.
- Submit a case study to GRESB via **Case studies**.
- Open the Assessment Overview under **View assessments**.

GETTING STARTED

2. Creating an entity

- a. Once logged in, if you have already participated in the GRESB Assessments, you will see a list of the reporting entities you manage or contribute to.
- b. If you are a new user or would like to set up a new reporting entity, select **Create new reporting entity**.
- c. This will open the 'New Entity' page.

The screenshot shows the 'Real Estate Entities' page in the GRESB portal. The browser address bar shows 'portal.gresb.com/real_estate/entities'. The page has a header with the GRESB logo and a navigation bar with 'Real Estate' and 'Infrastructure' tabs. Below the tabs is a table titled 'Real Estate Entities' with columns: REPORTING ENTITY, ASSESSMENTS, ACCESS, 2021 ASSESSMENT(S) STATUS, and MANAGE. The table contains two rows: 'Real Estate Test Entity Example GRESB Test' and 'Blackbird Test Ornithology Inc.'. Below the table is a green button with a plus sign and the text '+ Create new reporting entity', which is highlighted by a dashed orange box and a circled 'b'. To the right of the table is a sidebar with links for NEWS, TEMPLATES, RESOURCES, SCHEDULE, and CASE STUDIES.

REPORTING ENTITY	ASSESSMENTS	ACCESS	2021 ASSESSMENT(S) STATUS	MANAGE
Real Estate Test Entity Example GRESB Test		Access	Real Estate – Provide your intent	Manage
Blackbird Test Ornithology Inc.	View assessments	Access	Real Estate – Not started	Manage

+ Create new reporting entity

NEWS 1
Check your updates →

TEMPLATES
Manage templates →

RESOURCES
View resources →

SCHEDULE
View schedule →

CASE STUDIES
Submit a case study →



The screenshot shows a web browser window with the URL `portal.gresb.com/real_estate/entities/new?type=real_estate`. The page title is "New Real Estate entity". The GRESB logo is visible in the top left. The form is titled "New Real Estate entity" and has a section "Reporting Entity". It contains four input fields: "Entity Name **", "Fund Manager (Organization) Name **", "Entity Address **", and "Country of Entity's Headquarters **". Below these is a section "Entity characteristics" with the label "Nature of ownership" and three radio button options: "Listed entity", "Non-listed entity", and "Government entity".

New Real Estate entity

Reporting Entity

Entity Name **

Fund Manager (Organization) Name **

Entity Address **

Country of Entity's Headquarters **

Entity characteristics

Nature of ownership

☐ Listed entity

☐ Non-listed entity

☐ Government entity

2. Creating an entity

- All information on the New Entity page is required. This information will be communicated to GRESB Investor Members.
 - Click Save.
- i** Use the full name when creating an entity to make sure that investors and GRESB can identify the entity from the name provided.
- i** The entity characteristics that need to be provided differ slightly by assessment.

OVERVIEW

- Introduction
- Getting started
- **Managing Assessments**
- Assessment response

- 3. Assessments overview
- 4. Assessment collaborators
- 5. Templates
- 6. Manage entity
- 7. Asset portal (Real Estate)
- 8. Fund-asset links (Infrastructure)

REPORTING ENTITY	ASSESSMENTS	ACCESS	2021 ASSESSMENT(S) STATUS	MANAGE
Anemone Fund Test Flowers Ltd. <small>FUND ASSESSMENT</small>	<div>View assessments</div> <div>3</div>	<div>Access</div> <div>4</div>	Fund – 15% <div></div>	<div>Manage</div> <div>6</div>

3. Assessments overview

- Click on 'View assessments' for the reporting entity to see the Assessment overview.

Real Estate
Infrastructure

2019
2020
2021

Switch
between
Assessments

- Select Assessment **components** to complete
- Apply a **template** to the response
- Amend **data sharing** settings
- Change **intent** to submit
- Remove** a response

Assessments for Asset Entity 13122

ASSESSMENT - STATUS	PRINT	DOCUMENTS	LINKS	SHOP	MORE
<div style="display: flex; align-items: center;"> <div style="border: 1px dashed orange; padding: 5px; margin-right: 10px;"> Asset – 80% <div style="width: 80%; height: 10px; background-color: #006666; margin-top: 5px;"></div> </div> <div style="border: 1px dashed orange; padding: 5px; text-align: center;"> Edit response </div> </div>	<div style="border: 1px dashed orange; padding: 5px; margin: 0 auto; width: 30px;"> </div>	<div style="border: 1px dashed orange; padding: 5px; margin: 0 auto; width: 30px;"> </div>	<div style="border: 1px dashed orange; padding: 5px; margin: 0 auto; width: 30px;"> </div>	<div style="border: 1px dashed orange; padding: 5px; margin: 0 auto; width: 30px;"> </div>	<div style="border: 1px dashed orange; padding: 5px; margin: 0 auto; width: 30px;"> </div>

View
Assessment
completion rate

Open and edit
the Assessment
response

Generate a
pdf of the
response

View
uploaded
documents

View Fund-
Asset **links**
(Infra only)

Purchase
additional products
and services

←
ALL REPORTING ENTITIES

ASSESSMENTS

ACCESS RIGHTS

MANAGE ENTITY

Manage templates

MANAGING ASSESSMENTS

4. Assessment collaborators

- a. The **Access Rights** page can be opened from the panel on the right.
- b. All collaborators are listed in the overview and their access levels can be managed.
- c. An overview of access levels is available via **Learn more about access levels**.
- d. Investors can be granted access under **Grant Access to GRESB Member**.

Manage access rights for Anemone Fund Test

ASSESSMENT COLLABORATOR	ACCESS LEVEL	STATUS	REVOKE
	Account Manager	Active 6 August 2020	
Test@gresb.com	External Contributor	Invited 10 June 2021 Resend Invite	Revoke access
+ Invite new collaborator			

User access levels
Learn more about access levels →

Investor access rights

INVESTOR/REPORT ACCESS	GRANTED BY	GRANTED AT	REVOKE
No investors have requested access to this entity. For questions please contact GRESB.			
+ Grant Access to GRESB Member			

Navigation Panel:
← ALL REPORTING ENTITIES
ASSESSMENTS
ACCESS RIGHTS (a)
MANAGE ENTITY

Manage access rights for Anemone Fund Test

ASSESSMENT COLLABORATOR	ACCESS LEVEL	STATUS	REVOKE
Cathy Granneman c.granneman@gresb.com	Account Manager	Active 6 August 2020	
Test@gresb.com	External Contributor	Invited 10 June 2021 Resend Invite	Revoke access

+ Invite new collaborator

User access levels
Learn more about access levels →

Investor access rights

INVESTOR/REPORT ACCESS	GRANTED BY	GRANTED AT	REVOKE
No investors have requested access to this entity. For questions please contact GRESB.			
+ Grant Access to GRESB Member			

← ALL REPORTING ENTITIES

- ASSESSMENTS
- ACCESS RIGHTS
- MANAGE ENTITY

4. Assessment collaborators

- Add a collaborator by clicking **+Invite new collaborator**.
- After selecting 'Invite', an email with an invitation to collaborate is sent.
- Once the invitation is accepted the Assessment will be visible to the user when they log in.
- The Account Manager can **Revoke access** at all times.

MANAGING ASSESSMENTS

5. Template tool

- a. Access the template tool via 'Manage templates' or 'Templates'.
- b. Start a blank template via **Create template**.
- c. Create a template from an existing response through **Create template from assessment** and select the assessment you wish to template.
- d. Templates can be managed just like regular assessments with access rights and document management under **Manage**.

Real Estate Templates

TEMPLATE	ASSESSMENT	LAST UPDATED	MANAGE
Test RE Birds GRESB B.V.	2021 Real Estate	1 June 2021	

← ALL REPORTING ENTITIES

Create template ...

Create template from assessment ...

Response templates provide an easy way to complete answers for portions of the Assessment that are applicable across several entities. It is possible to create a new blank template or to create a template on the basis of an already started Assessment. Complete the template to the degree suited for your organization. Note that a few indicators may not appear in the template tool because these are deemed specific to the performance of the reporting entity's portfolio. Consequently, the template answers should not be applied to multiple reporting entities.

Once you are satisfied with a template, you can apply it to any of your other Assessments:

- Go to the GRESB Portal;
- Click on the "View Assessment" button of an individual Assessment;
- Click on "More", and;
- Select "Apply template" and chose the relevant template.

Applying a template will copy any answers provided in the template into the Assessment. Answers not provided in the template will not be affected. Finally, a template's "Manage" menu contains "Access Rights." From here you can invite other users to collaborate on the template content, manage access to the template, or use the template for other users' Assessments. Users who have been invited to use the template will be able to apply the template to the Assessment(s) in their account.



Editing Peony Asset Test

Reporting Entity

Entity Name*

Peony Asset Test

Organization Name (May be same as entity name)*

Flowers Ltd.

Entity Address*

Floral avenue 123

Country of Entity's Headquarters

Netherlands

Entity characteristics

Ownership (Select one)

☐ Public (listed) entity

☒ Private (non-listed) entity

☐ Public-Private Partnership (PPP)

☐ Non-profit entity

← ALL REPORTING ENTITIES

ASSESSMENTS

ACCESS RIGHTS

MANAGE ENTITY

6. Manage entity

- Change the entity characteristics under **Manage entity**.

MANAGING ASSESSMENTS

7. Asset portal (Real Estate only)

- Access the Asset Portal via the Assessments overview.
- Upload assets via the GRESB Asset Spreadsheet through **Upload Assets in Excel**.
- It is possible to add assets via **+New Asset**.
- Use the **Export Data to Excel** function to download data to the GRESB Asset Spreadsheet.
- Use the **Update portfolio data** function to sync data in the Asset Portal with the Assessment Portal.

The screenshot shows the 'Assets for Blackbird Test' page in the GRESB Asset Portal. The page has a header with the GRESB logo and a navigation bar with tabs for 'Data', 'Analytics', and 'Climate Risk'. The 'Data' tab is selected. Below the tabs, there are search and filter options. A dashed orange box highlights four buttons: 'Upload Assets in Excel' (labeled 'b'), 'Export Data to Excel' (labeled 'd'), 'Update portfolio data' (labeled 'e'), and '+ New Asset' (labeled 'c'). Below these buttons, there is a message: 'Please click here to learn how to avoid duplicate assets.' and 'Displaying 1 asset'. A table with one row of asset data is shown below.

ASSET NAME ↓	PROPERTY TYPE	COUNTRY	CITY/STATE ↓	SIZE (M²) ↓	ERRORS	OUTLIERS	READY TO SUBMIT ↓	MANAGE
Bird's nest	Retail: Restaurants/Bars	United Kingdom	Swansea Wales	500	11		×	⚙️



Manage assets for Anemone Fund Test

ASSET NAME	SECTOR	EXCLUDED FROM SCORING	ASSET WEIGHT (100)%	CONNECTION STATUS	ASSESSMENT STATUS
Peony Asset Test	Environmental Services		100%	Confirmed	99%

Asset name *

Ownership

Asset weight

Asset sector *

Nature of investment *

Reason for exclusion from scoring ⓘ

Connect

Save Cancel

8. Fund-Asset links (Infrastructure only)

- Funds and assets can review links in the Assessment overview.
- Funds can add assets and **connect** them to their fund by sending a link request.
- One of the asset's account managers needs to confirm the request before the asset is linked.
- Assets can revoke access at any time.
- Funds can add assets that do not (yet) participate in the GRESB Assessment.



OVERVIEW

- Introduction
- Getting started
- Managing Assessments
- **Assessment response**

9. Component selection

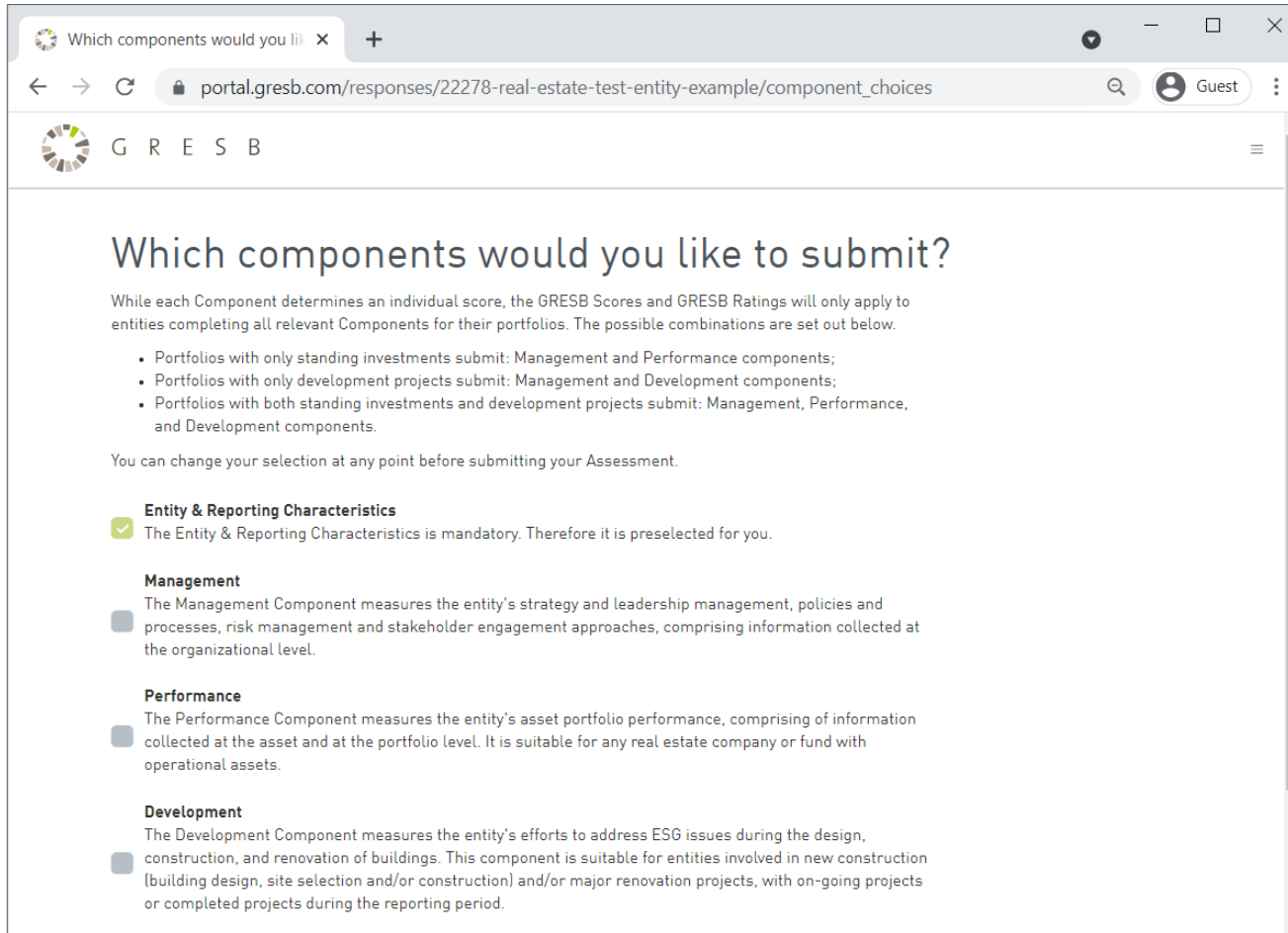
10. Editing the response

11. Purchasing additional products

12. Review and submit



GRESB Training platform



The screenshot shows a web browser window with the URL `portal.gresb.com/responses/22278-real-estate-test-entity-example/component_choices`. The page header includes the GRESB logo and a 'Guest' user profile. The main heading is 'Which components would you like to submit?'. Below this, a paragraph explains that components determine individual scores and that possible combinations are set out below. A bulleted list specifies submission rules for different portfolios. A note states that selections can be changed before submission. The page lists four components: 'Entity & Reporting Characteristics' (preselected with a green checkmark), 'Management' (unchecked), 'Performance' (unchecked), and 'Development' (unchecked). Each component has a brief description of what it measures.

Which components would you like to submit?

While each Component determines an individual score, the GRESB Scores and GRESB Ratings will only apply to entities completing all relevant Components for their portfolios. The possible combinations are set out below.

- Portfolios with only standing investments submit: Management and Performance components;
- Portfolios with only development projects submit: Management and Development components;
- Portfolios with both standing investments and development projects submit: Management, Performance, and Development components.

You can change your selection at any point before submitting your Assessment.

Entity & Reporting Characteristics
☒ The Entity & Reporting Characteristics is mandatory. Therefore it is preselected for you.

Management
☐ The Management Component measures the entity's strategy and leadership management, policies and processes, risk management and stakeholder engagement approaches, comprising information collected at the organizational level.

Performance
☐ The Performance Component measures the entity's asset portfolio performance, comprising of information collected at the asset and at the portfolio level. It is suitable for any real estate company or fund with operational assets.

Development
☐ The Development Component measures the entity's efforts to address ESG issues during the design, construction, and renovation of buildings. This component is suitable for entities involved in new construction (building design, site selection and/or construction) and/or major renovation projects, with on-going projects or completed projects during the reporting period.

9. Component selection

- Select the components you intend to complete at the start of the assessment.
- You can change the selection prior to submission under 'More' in the Assessment overview.
- The Entity & Reporting Characteristics section is always mandatory.
 - The Development Component is only available for Real Estate.
 - The Performance Component is not completed by Infrastructure Funds.

ASSESSMENT RESPONSE

10. Editing the response

- Click on 'Edit response' in the Assessment overview.
- Use the **Contents** menu to navigate between aspects and indicators.
- Select **Next** to continue to the next section.
- The system saves your edits automatically.

2021 Fund Assessment: Anemone x

portal.gresb.com/respondent/responses/21401-anemone-fund-test/edit#1-1

Guest

Contents Leadership ← BACK TO ASSESSMENT PORTAL

LE3 Max. score 1.1 Guidance Ask GRESB

Individual responsible for ESG and/or climate-related objectives

Does the entity have one or more persons responsible for implementing ESG and/or climate-related objectives?

☐ Yes

☐ No

Provide additional context for the answer provided (not validated, for reporting purposes only)

Optional

» Word count: 0 out of 250 words

LE4 Max. score 1.5 Guidance Ask GRESB

ESG and/or climate-related senior decision maker

Does the entity have a senior decision-maker accountable for ESG issues and/or climate-related issues?

☐ Yes

5 ACTION REQUIRED

LE1 Please complete.

LE2 Please complete.

LE3 Please complete.

LE4 Please complete.

LE5 Please complete.

← Previous **Next** →

10. Editing the response

- There are several tools in the Assessment editor that help you with your response.
- Some features will only be available if the entity reported in the previous year.

The screenshot shows the 'Objectives' section of the GRESB Assessment Response editor. A sidebar on the left contains a 'Contents' button. The main area displays a progress bar for 'LE6' (Personnel ESG performance targets) with a score of 1.78/3.55. Below the progress bar, there are two questions: 'Does the entity include ESG factors in the annual performance targets of personnel?' and 'Does performance against these targets have predetermined consequences? (multiple answers possible)'. The first question has a 'Yes' radio button selected. The second question has a 'Yes' radio button selected, and two checkboxes below it: 'Financial consequences' (unchecked) and 'Non-financial consequences' (checked). On the right side, there is an 'Action panel' showing '1 ACTION(S) REQUIRED' and 'LE5 Please complete.' with 'Previous' and 'Next' buttons. A 'BACK TO ASSESSMENT PORTAL' button is also visible.

Callout boxes provide additional information:

- Navigate the response:** Points to the 'Contents' button in the sidebar.
- The maximum available points for the indicator (if indicator is scored):** Points to the 'Max. score 2.84' in the progress bar.
- The points awarded for the indicator in the previous year (if applicable):** Points to the 'Score 2020: 1.78/3.55' in the progress bar.
- Confirmation if the indicator is prefilled from a previous- year response (if applicable):** Points to the 'Pre-filled from 2020' checkbox in the progress bar.
- Guidance, including references, on how to complete the indicator:** Points to the 'Guidance' button in the progress bar.
- Contact the GRESB helpdesk with any queries:** Points to the 'Ask GRESB' button in the progress bar.
- The Action panel indicates any actions or errors that need to be reviewed before the indicator is completed:** Points to the '1 ACTION(S) REQUIRED' and 'LE5 Please complete.' section on the right.

11. Purchasing additional products

- Navigate to 'Shop' in the Assessments overview to view various products available for purchase.
- Response Checks are available from 1 April to 1 June. It is not necessary to have completed the Assessment when purchasing a Response Check.
- Results Reviews are available between 1 - 15 September.
- Customized Benchmark Reports are available from 1 October onwards.

The screenshot shows a web browser window with the URL `demo-portal.gresb.com/results/reports/21014-asset-response-21014/products`. The page header includes the GRESB logo and the text 'G R E S B'. The main content area is divided into two sections, each with a title bar and a description.

Response Check (Unavailable)

A Response Check features a careful review of your Assessment response followed by a 1-hour discussion call. After the discussion call, you will receive a feedback report highlighting issues found. It is intended to ensure you have not overlooked important details in your submission and provides you the opportunity to ask for additional guidance and clarification on the GRESB Assessment indicators. For more information about the Response Check, [click here](#). The deadline to request a Response Check is June 1, 23:59 PDT.

Customized Benchmark Report (Unavailable)

Customized Benchmark Reports (available on request) provide an alternative comparison and ranking based on a customized peer group, which can be selected by participants themselves. Participants who wish to obtain a Customized Benchmark Report must first have access to the corresponding Benchmark Report.

The screenshot shows a web browser window with the URL `portal.gresb.com/infrastructure/entities/17830-peony-asset-test/2021/responses/18854/submission/reviewi...`. The browser's address bar shows the GRESB logo and the text "G R E S B". The page header includes a "Contents" button, a "Review and ..." button, and a "← BACK TO ASSESSMENT PORTAL" link. A yellow information box contains the following text: "Reporting entities can be linked, for payment purposes, to a Participant Member invoicing account. Currently, this reporting entity is not linked and will therefore be charged full price upon submission. If this entity should be linked to a Participant Member invoicing account paying annually, [click here](#)". Below this, a section titled "Please read this BEFORE submitting your Assessment." contains the text: "To ensure you can submit without hitting a paywall for entities you have already paid for, the entities must be linked to your Participant Member invoicing account in the Portal. If this entity still needs to be linked, please contact us via the [Contact Form](#) and select 'Finance and administration'." The text "Contact Form" is circled in orange with a dashed border and a small orange circle containing the letter 'b' next to it. Below this, it says "Other inquiries can also be directed via the [Contact Form](#)." At the bottom, there is a green button labeled "Proceed to submit".

12. Review and submit

- Ensure the response is complete before proceeding.
- If the entity should be linked to an invoicing account, confirm this first via the **Helpdesk**.
- If the entity isn't linked to an invoicing account, you can pay via credit card on the next page.
- You will receive confirmation that your response has been submitted.

© 2021 GRESB BV

Unless explicitly stated otherwise, all rights including those in copyright in publication are owned by or controlled for these purposes by GRESB B.V.

Except as otherwise expressly permitted under copyright law or GRESB B.V.'s terms and conditions, no part of this publication may be reproduced, copied, republished, downloaded, posted, broadcast or transmitted in any way without first obtaining GRESB B.V.'s written permission.

This publication and the statements made reflect the opinions of GRESB and not of our members. The information in the presentation has been provided in good faith on an "as is" basis. We take reasonable care to check the accuracy and completeness of materials prior to their publication. However, the information in the presentation has not been independently verified. In addition, the statements in the presentation may provide current expectations of future events based on certain assumptions. The variety of sources from which we obtain the information in the presentation means that we make no representations and give no warranties, express or implied as to its accuracy, availability, completeness, timeliness, merchantability or fitness for any particular purpose.

The publication and materials are not provided as the basis for any professional advice or for transactional use. GRESB and its advisors, consultants and sub-contractors shall not be responsible or liable for any advice given to third parties, any investment decisions or trading, or any other actions taken by you or by third parties based on information contained in the presentation and/or materials.