

2019 GRESB Reporting Playbook First Steps

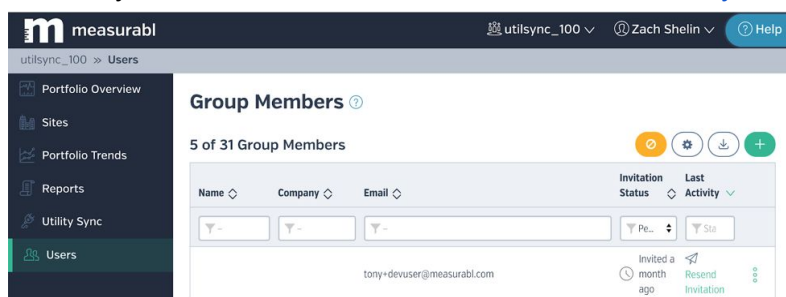
Add new users, remove inactive users	1
Delegate and set deadlines	2
Add missing sites	2
Add missing Utility Sync accounts	2
Fix Utility Sync issues	4
Push manual utility data	5
Request third party assurance in advance	5
Schedule a Data Check with your CSM	5
Use the 2019 GRESB portal in Measurabl	6

Add new users, remove inactive users

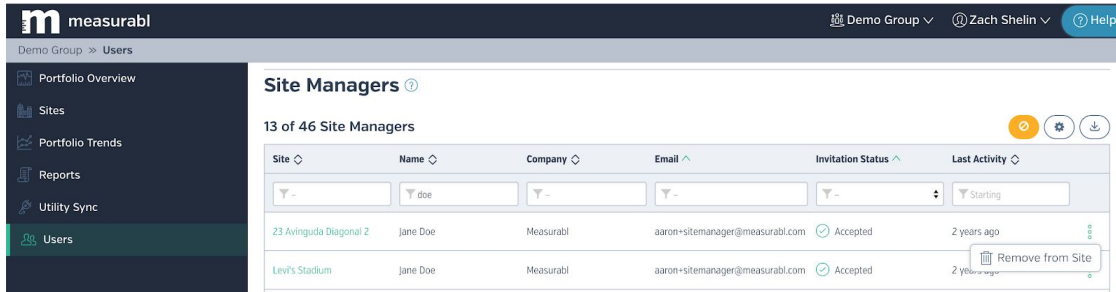
Click [here](#) to open the app and get a walkthrough of the process. Note that you must be logged into the app before clicking the link to trigger the walkthrough.

Click [here](#) to see a detailed support article on this task.

Invite any new users who need access. [Ensure that they receive and accept their invitations.](#)



Remove all inactive group members/site managers.



Delegate and set deadlines

Make clear to your team who is in charge of entering and reviewing site level data, including: Gross Asset Value (GAV), Gross Floor Area (GFA), spaces, control/occupancy, lifecycle events (bought and sold dates, major renovations, appraisals), projects/audits, and certifications/ratings. Determine deadlines for data entry and review.

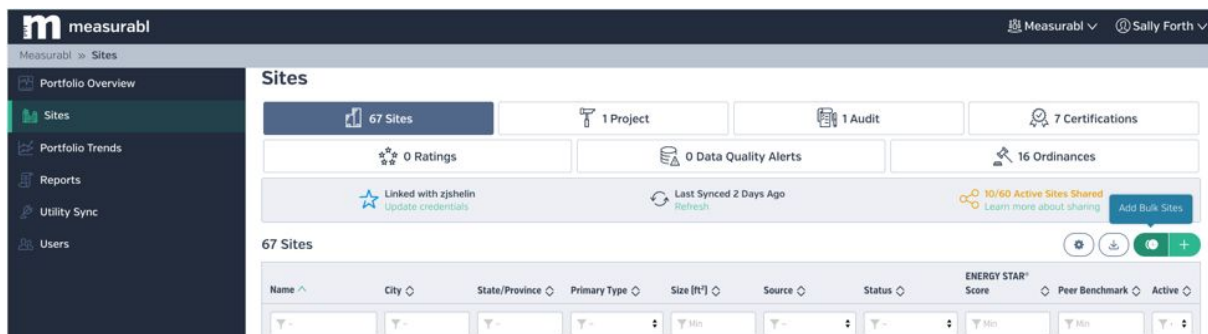
Add missing sites

Click [here](#) to open the app and get a walkthrough of the process.

Click [here](#) to see a detailed support article on the task.

Make sure to add any sites that your organization has acquired recently, or sites that just haven't been added to the app yet.

If you've added these sites in ENERGY STAR, simply [share them with Measurabl within ENERGY STAR](#). If you're using Utility Sync or want those sites in ENERGY STAR for any other reason, you'll need to [add them in ENERGY STAR first](#), then share them with Measurabl. If you're adding purely manual sites that don't need to be in ENERGY STAR, you can add them manually within the "Sites" tab, either individually or [using the Bulk Site template](#).



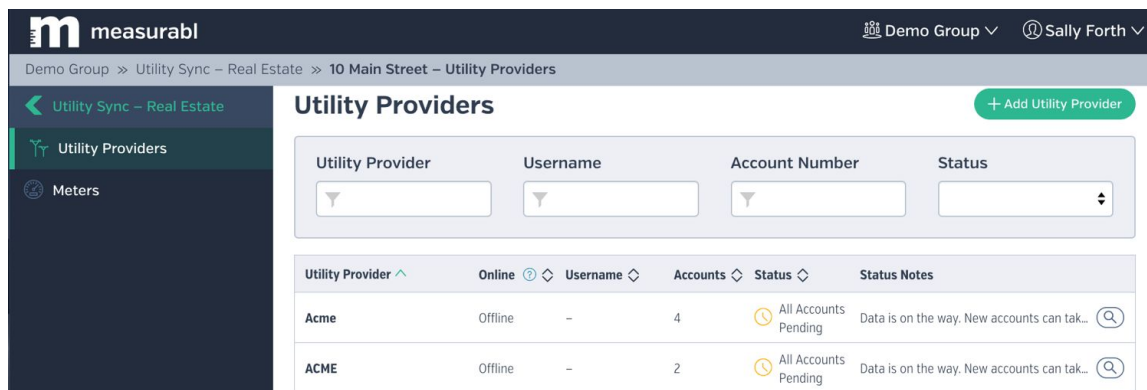
Add missing Utility Sync accounts

Click [here](#) for a walkthrough on adding online Utility Sync accounts.

Click [here](#) for a walkthrough of adding offline Utility Sync accounts.

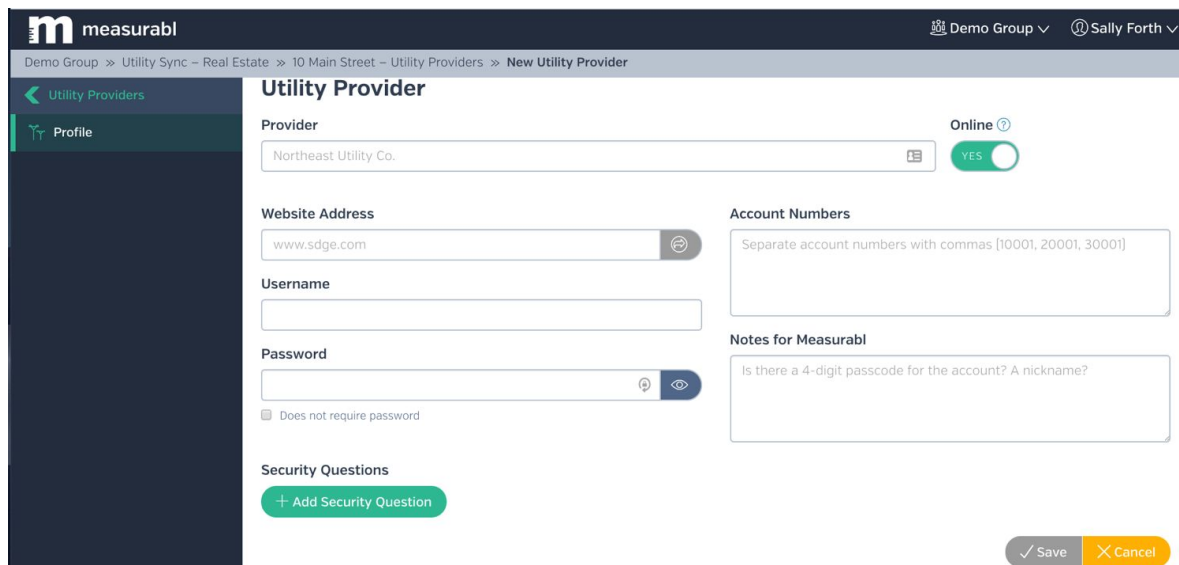
Click [here](#) for a detailed support article on the task.

Add account information for any online Utility Sync accounts that you'll use to push data automatically. Email your CSM or support@measurabl.com if you'd like to activate Utility Sync on sites that do not yet have it.



The screenshot shows the 'Utility Providers' page in the Measurabl interface. The breadcrumb trail is 'Demo Group >> Utility Sync - Real Estate >> 10 Main Street - Utility Providers'. A sidebar on the left contains 'Utility Sync - Real Estate', 'Utility Providers', and 'Meters'. The main content area has a '+ Add Utility Provider' button and a form with fields for 'Utility Provider', 'Username', 'Account Number', and 'Status'. Below the form is a table with the following data:

Utility Provider ^	Online ?	Username	Accounts	Status	Status Notes
Acme	Offline	-	4	All Accounts Pending	Data is on the way. New accounts can tak... 🔍
ACME	Offline	-	2	All Accounts Pending	Data is on the way. New accounts can tak... 🔍

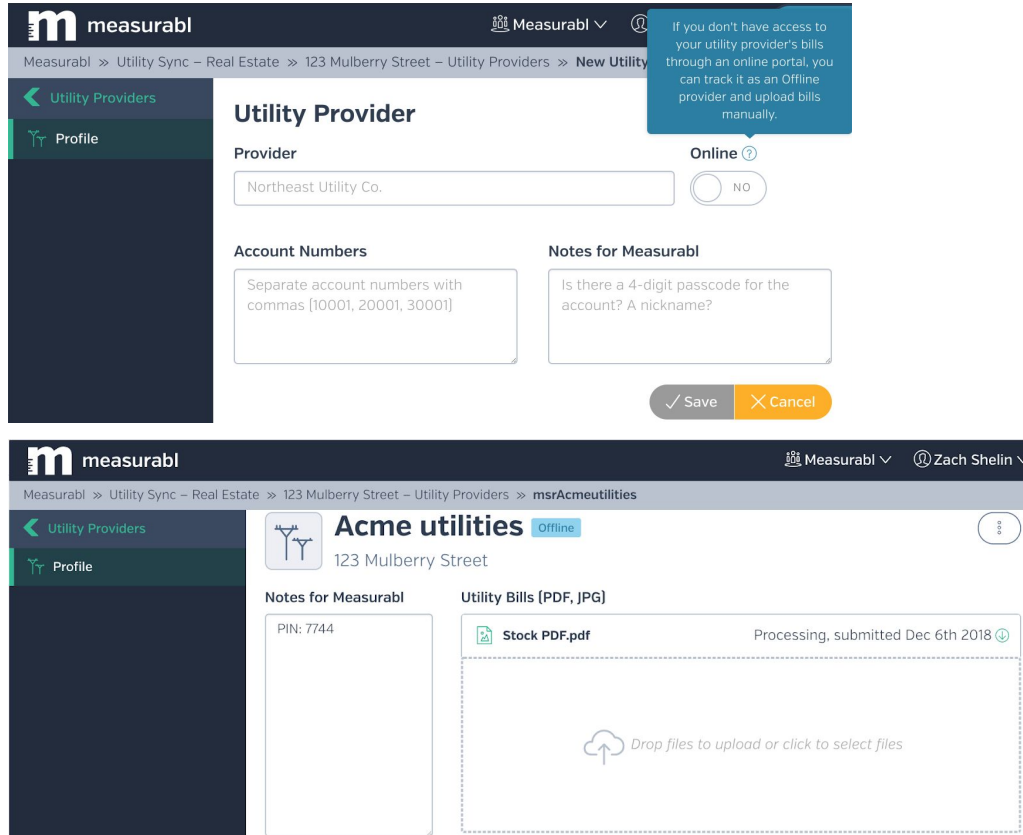


The screenshot shows the 'New Utility Provider' form in the Measurabl interface. The breadcrumb trail is 'Demo Group >> Utility Sync - Real Estate >> 10 Main Street - Utility Providers >> New Utility Provider'. The sidebar on the left contains 'Utility Providers' and 'Profile'. The form includes the following sections:

- Provider:** Text input with 'Northeast Utility Co.' and an 'Online ?' toggle set to 'YES'.
- Website Address:** Text input with 'www.sdge.com' and a copy icon.
- Username:** Text input.
- Password:** Text input with a toggle for 'Does not require password'.
- Account Numbers:** Text input with a placeholder 'Separate account numbers with commas [10001, 20001, 30001]'.
- Notes for Measurabl:** Text input with a placeholder 'Is there a 4-digit passcode for the account? A nickname?'.
- Security Questions:** A '+ Add Security Question' button.

At the bottom right, there are 'Save' and 'Cancel' buttons.

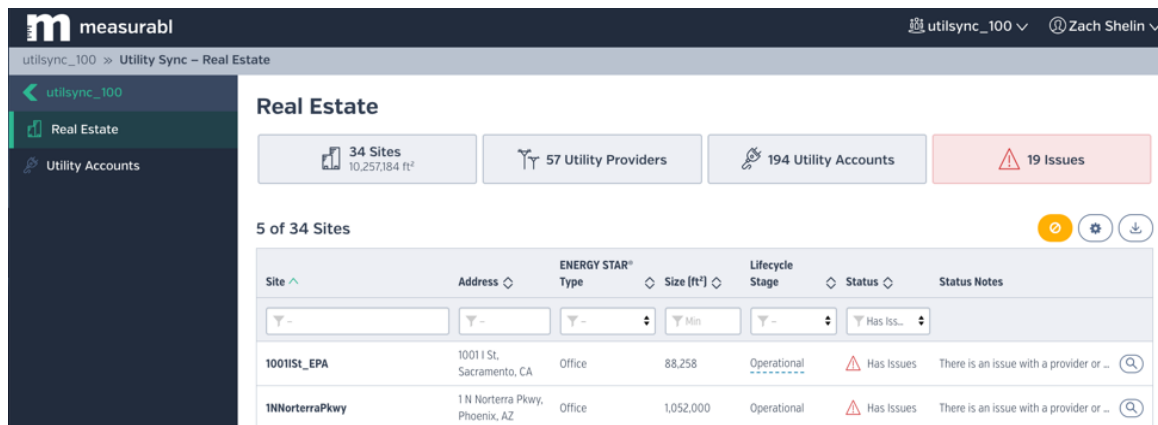
If you're setting up Utility Sync offline accounts (where you'll upload PDF bills to push data), mark the "Online" radio button below to "No", then drag and drop PDF bills on the next page:



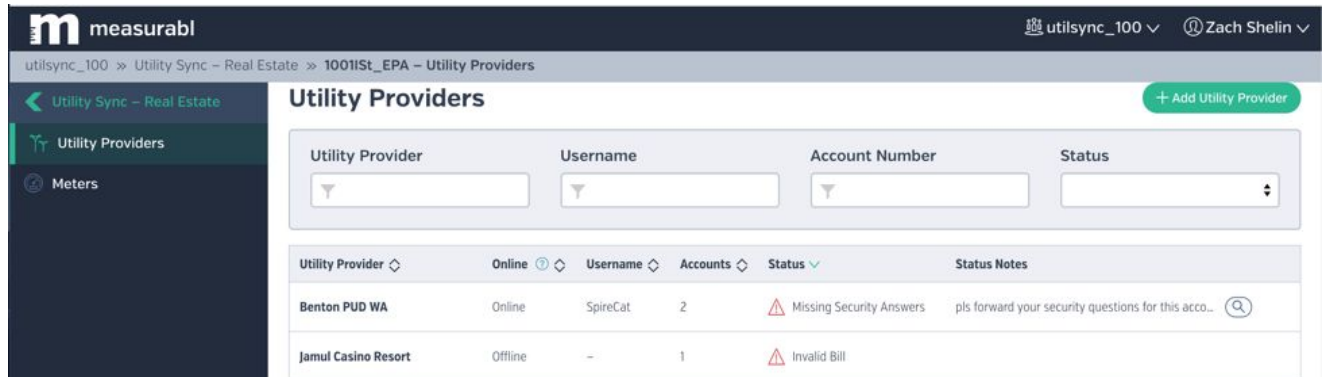
Fix Utility Sync issues

Click [here](#) to see a detailed support article on this task.

Head to your account's Utility Sync tab and filter the "Status" column for "Has Issues". You'll see a list of all sites that have issues blocking automatic data updates.



Click on each site listed to see what the individual account issues are. Fix those account issues to get the data flowing so that nothing is missing come reporting season. Email your CSM or support@measurabl.com if you run into questions.



The screenshot shows the 'Utility Providers' page. At the top, there are filters for 'Utility Provider', 'Username', 'Account Number', and 'Status'. Below these filters is a table with the following data:

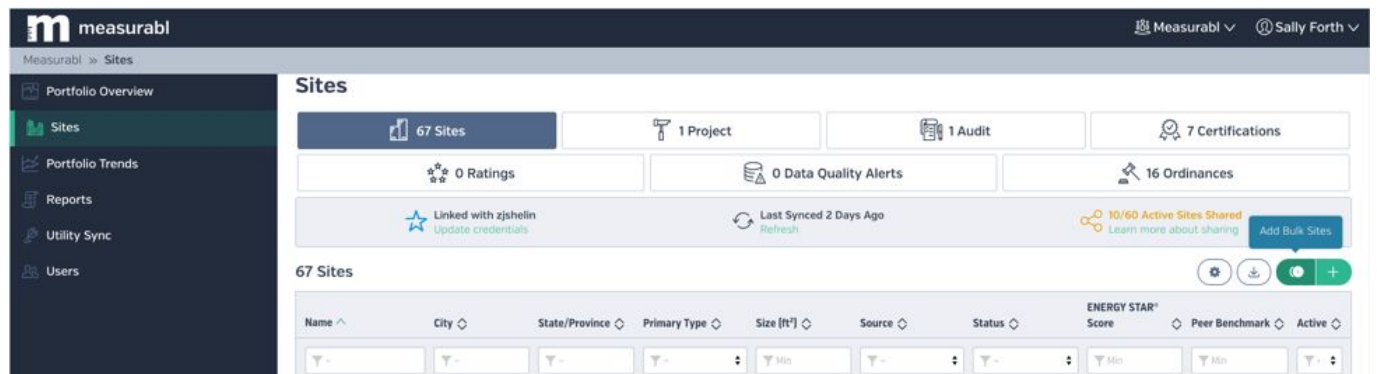
Utility Provider	Online	Username	Accounts	Status	Status Notes
Benton PUD WA	Online	SpireCat	2	Missing Security Answers	pls forward your security questions for this acco...
Jamul Casino Resort	Offline	-	1	Invalid Bill	

Push manual utility data

Click [here](#) to open the app and get a walkthrough of the process.

Click [here](#) to see a detailed support article on adding manual utility data. [This article](#) goes into more depth on adding utility data in bulk.

Make sure to push any utility data that is not already being pushed via Utility Sync. The best way to do that may be to use our Bulk Sites template (as discussed in the second article linked above) to upload large amounts of utility data once. Of course, you can always add data to individual sites manually within the app.



The screenshot shows the 'Sites' page. At the top, there are summary statistics: 67 Sites, 1 Project, 1 Audit, 7 Certifications, 0 Ratings, 0 Data Quality Alerts, and 16 Ordinances. Below these are links for 'Linked with zjshelin', 'Last Synced 2 Days Ago', and '10/60 Active Sites Shared'. The main content area is a table with the following columns:

Name	City	State/Province	Primary Type	Size (ft ²)	Source	Status	ENERGY STAR [®] Score	Peer Benchmark	Active
				Min			Min		

Request third party assurance in advance

Email us at support@measurabl.com if you'd like third-party assurance for your GRESB report submission. You can see our brief overview of third-party assurance [here](#). While the deadline to request assurance is **March 31**, requesting it earlier will give you more time to work through any issues that are discovered.

Schedule a Data Check with your CSM

Once your data is ready, ideally by early March, you and your CSM will coordinate to schedule a Data Check. During the Data Check, you and your CSM will run through any missing/overlapping data together with data quality alerts across your sites for the reporting period (calendar years 2017 and 2018). Fixing the issues identified on the call will get you ready to submit to GRESB for a formal Response Check, should you choose to do so.

Use the 2019 GRESB portal in Measurabl

We've opened a 2019 GRESB pre-assessment portal in Measurabl (using the 2018 assessment framework) so that you can see how ready you are for GRESB reporting right now. If you'd like, you can also submit to the GRESB 2019 pre-assessment to get advance feedback on the management and policy portions of your report. See [this page](#) for more information.

In early April, we'll release the full 2019 GRESB portal in the app, using the 2019 assessment framework. GRESB will release the 2019 assessment reference guide on March 1, and they will open the 2019 assessment portal April 1. As we release our portal, we'll map any 2018 GRESB report data you may have into our app's 2019 portal to save you time. We'll also offer an in-app Response Check that'll give you real-time feedback on your data completeness and data quality.