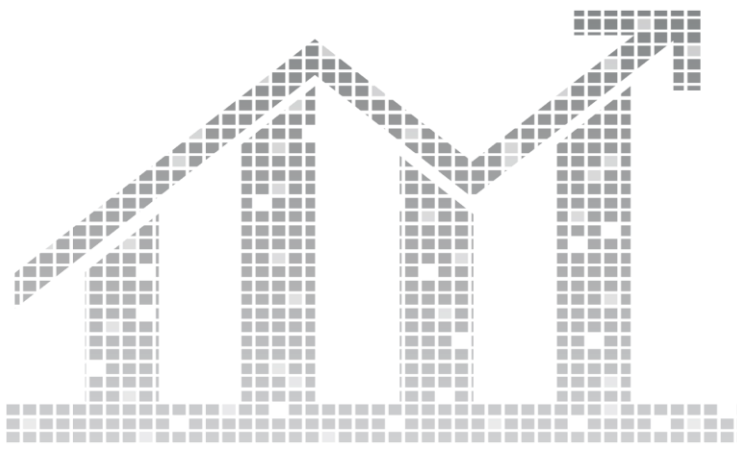




# INVESTOR DATA SHARING TOOL USER MANUAL

MANAGER VERSION



# INTRODUCTION

ANREV Investor Data Sharing Tool delivers on our mission to facilitate performance information exchange between investors and managers and to further increase transparency through consistent investor data analytics

This manual is a step-by-step guide from the **manager** perspective on how to enable vehicle visibility and manage data access requests

# SHARING MANAGER ROLE

To set vehicle visibility and manage incoming investor data access requests you must request/be assigned the 'Sharing manager' role

If you are a new user on the [ANREV Data Platform](#), you can select this role when registering your account for the first time

If you are an existing user on the [ANREV Data Platform](#), please contact an ANREV admin to assign you the role

User Manager: manage user roles in this organisation

Vehicle Manager: contribute and approve all vehicle data

Vehicle Contributor: provide data on select vehicles.

**Sharing Manager: approve and manage data sharing requests from other organizations.**

User: view user listing and published indices if available.

Survey User: can view links survey links

# ENABLE VEHICLE VISIBILITY

Use the navigational menu on the left-hand side to select which of your vehicles will be visible for investors to request access to, simply click on 'Vehicle visibility'

Only those vehicles that are approved by ANREV and are included in the universe or an index will be eligible for data sharing

**ANREV** DATA PLATFORM

Dashboard ⏪

**Vehicle Visibility** This page includes only vehicles that have been approved and included the vehicle universe or indices and are therefore eligible for data sharing.

NAME	ALLOW SHARING REQUESTS
ANREV ODCE Fund	<input checked="" type="checkbox"/>
Fund A	<input checked="" type="checkbox"/>
Fund B	<input checked="" type="checkbox"/>

Navigation menu items: Dashboard, Provide & Review Data, Vehicles, Analyse Data, Vehicle Performance, Downloads, Recent, Data Sharing, Manage Requests, **Vehicle Visibility**, View Organisation, User Listing

# INCOMING DATA ACCESS REQUESTS FROM INVESTORS

You can manage incoming investor data access requests through the 'Manage requests' section

When a new request comes in you will receive a notification on the platform and via email

Active data sharing can also be revoked at any time

**ANREV DATA PLATFORM**

Dashboard ⌂ ANREV Test / Data Requests

**Manage Data Requests**

Pending (2) Active (2) Inactive (3)

REQUEST DATE	REQUESTED BY	REQUEST DETAILS	NOTES
<b>22 March 2023</b> <i>(about 1 year ago)</i>	Amelie Delaunay amelie.delaunay@anrev.org ANREV Test	Vehicles requested: REQUEST DETAILS Investing in the fund	
<b>1 November 2023</b> <i>(5 months ago)</i>	Investor ANREV anrevinvestor@gmail.com ANREV Investor Organization 1	Vehicles requested: ANREV ODCE Fund, Fund A , and Fund B REQUEST DETAILS existing investor	

# TAILOR INVESTOR'S DATA ACCESS

Any incoming investor data access requests can be accepted and tailored or declined  
Data access can be tailored per vehicle by the level of access, performance history and access duration  
You are in full control over which investor has access to what data, if any

**ANREV DATA PLATFORM**

Dashboard < ANREV Test / Accepted Data Requests / Manage Data Request

**Manage Data Request**

Review and Respond to Pending Request

REQUEST DATE: 1 November 2023 (5 months ago) | REQUEST STATUS: Accepted

REQUESTED BY: Investor ANREV | REQUEST DETAILS: Vehicles requested: ANREV ODCE Fund, Fund A, and Fund B

anrevinvestor@gmail.com | REQUEST DETAILS: existing investor

**Select a Response**

Accept and Adjust Request for Access | Reject Request with Note | Clear Your Response

**Confirm Vehicles to Share**

VEHICLE	PERFORMANCE HISTORY	ACCESS DURATION
<input checked="" type="checkbox"/> ANREV ODCE Fund <b>Requested</b> <input checked="" type="checkbox"/> Include vehicle performance	<input type="radio"/> All history   <input type="radio"/> Specific time ranges	<input checked="" type="radio"/> Indefinitely   <input type="radio"/> Until Expiration Date
<input checked="" type="checkbox"/> Fund A <b>Requested</b> <input checked="" type="checkbox"/> Include vehicle performance	<input type="radio"/> All history   <input type="radio"/> Specific time ranges	<input checked="" type="radio"/> Indefinitely   <input type="radio"/> Until Expiration Date



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