Phase 3 Requirements – SEMI

1. **Contractor Functionality**

* Update registration process:
  + Add simplified checkbox for eligible contractors
  + Add clarification for Individual vs Account Owner registration
  + Add information icon for Individual option
* Implement contractor details collection:
  + Supported activities (Capital Retrofit, EMIS, EAA)
  + Technology capabilities with "Other" option
  + Service regions in Alberta
  + Attestations (GST, WCB, insurance)
* Add contractor management in admin panel:
  + Enerva Admin can change the activities supported by the Contractor
  + Permission management system
  + Access control for contractor users
* Implement E-Sign functionality for Code of Conduct using DocuSeal:
  + Add event tracking for document viewing
  + Provide downloadable version of document
  + Track document acceptance status
  + Make code of conduct signing mandatory before accessing facility list

1. **Multiple File Upload/Document Management**

* Create document repository structure with:
  + Pre-activity documents
  + Post-activity documents
  + Application-specific documents
* Enable Enerva admin to manage templates (upload, delete, replace)
* Allow users to upload multiple files per application. Users can upload the file, select the type of document they are uploading, or type a new document description.
* Enerva admin should be able to add documents for a specific company to the document repository. This should be separate from the global templates.
* Enerva admin should be able to upload files to a global template library which would show within the document repository for all customers.
* Download all documents (for Enerva admin – zip the folders).
* Track who uploaded each document (user attribution)
* Maintain separate document repositories for different application types (FRA, Capital Retrofit, etc.)
* Add document attribution:
  + Track document creator/uploader (contractor or facility owner)
  + Display upload attribution in pre/post activity sections

1. **Activity Management**

* Enable/disable different activities (FRA, SEM, etc.) from admin panel
* Ability to export submitted applications for each activity.
* Support multiple applications for programs like Capital Retrofit
* Maintain single application flow for FRA
* Lock additional applications until FRA completion.
* Add recognition tab for tracking achievements/certifications:
  + Admin-only editing
  + User view-only access
  + Display certifications, baseline energy data, savings data

1. Facility Recognition
   1. Facility Baseline Energy Consumption
   2. Facility Energy Savings
   3. Facility Certification or Achievements