SUNShINE Platform powered by EUROPA

A User Manual

V.1.0.

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Introduction

Do you want to digitise your energy retrofitting projects or find the right company to do the work? Are you a One-Stop-Shop that is interested in finding new organisations and residents for cooperation? **The SUNShINE Platform powered by EUROPA** is the right tool for you.

The SUNShINE Platform consists of the different tools to support the work of One-Stop-Shops, any organisation active in energy retrofitting activities, as well as financial and governmental institutions, and, of course, primarily the residents of multi-family dwellings. By using the stakeholder approach, the platform creates a transparent process for retrofitting activities. In this way, the platform speeds up the planning and execution of projects providing a step-by-step approach with instructions and templates.

With the newest additions powered by the EUROPA project, the SUNShINE Platform provides a toolkit for the One-Stop-Shops containing Onboarding Questionnaires for the Residents, Housing Associations, and Operators, a Renovation Cost Calculator, Energy Efficiency Subscription Checklist, and an Energy Efficiency Subscription Refinanceability Checklist. One-Stop-Shops have access to the results and editing capabilities of these tools, which help them fit the tools for the local context.

The SUNShINE platform is an original idea that has been co-funded by the European Union's Horizon 2020 Framework Programme through the projects SUNShINE (Grant nr. 649689), FinEErgo-Dom (Grant nr. 847059), and EUROPA (Grant nr. 956649).

1. Starting on the SUNShINE Platform

Dear Visitor, Welcome! What are your interests in visiting today? If saving money on utility bills is one of your top priorities, you've found the right place. If you own a business, make a product or supply goods, you will find resources here that will help you better explain what you offer and how you can deliver it to customers. Every User can find the right way to use the Platform.

If you want to see the informational materials and organisations registered on the Platform, you can do it without registration. However, if you are interested in using specialised and localised tools, registering the buildings or even managing a project - you have to register on the Platform. **Section 1.1.** is dedicated to describing the possibilities of any User without the login, whereas the following sections describe the processes and flow for registered users only.

1.1. Tools available without registration

The platform offers three different Onboarding Questionnaires, one each for Residents, Housing Associations, and Operators. The differences between the Onboarding Questionnaires are described later in this Section. The User can download the informative materials related to the EUROPA project and energy retrofitting activities on the **Resources page**.

The User journey starts on the landing page for Residents and Housing Associations. The page summarises the overall summary of the capabilities with links to the different tools offered after the submission of the Onboarding Questionnaire or Registration Form. To understand the distinction, read Section 1.2.

The Operator Onboarding Questionnaire is available by visiting the **Operator page**.

The Building Calculator is the only tool available for Users without a login. This resource helps the visitor calculate potential cost savings and total project costs associated with an energy retrofit. No information is saved or downloadable from this tool.

Through the Platform's Find My Partner feature, Residents and Housing Associations can research the available Organisations, learn about the services they provide, and connect with them directly. A link to the module can be found in the main menu. Upon activating the module, a directory of available companies is displayed. Organisation, service, proximity to the User, and One-Stop-Shop (OSS) approval are just some of the criteria that can be used to narrow down the list. You can get in touch with any of these businesses by clicking on their names. You'll find a link to the onboarding questionnaire for Residents and Housing Associations at the bottom of the page.

In addition to this link in the Find My Partner module, the User can access the questionnaire by selecting Learn more or by scrolling down to the first grey box and selecting the "***Let's start***" button on the Landing Page. The User's country and postal code must be entered before any other personal information can be collected. Using this method, we can identify if the OSS is functional in the User's location. Users' personal information is collected in the first section of the Onboarding Questionnaire. The following sections feature questions about the building's condition, aimed at both residents and housing associations. Following are questions about the Organisation's area(s) of expertise that appear on the Onboarding Questionnaire for the Operators. The OSS is alerted whenever a new User signs up, allowing them to welcome a new platform member. Aside from the Password, the OSS can see all of the inputted data.

1.2. Registration process

There are two ways to register the User on the platform: through any of the Onboarding Questionnaires, in which the account will be linked to the OSS, that can support the User in further actions on the Platform, and through the registration form, which you can open through the "Login" button. Please refer to Figure 1 for a summary of the differences between the registration processes.

The Organisation will be registered automatically if the User goes through the onboarding questionnaire for the operators. In this case, the only pending part for the User is to upload the required documents in the Organisation's section of the platform for the Super User - the country-level managers of the platform's integrity - to approve the organisation. If the User is registered through the Registration Form, they can register the organisation in the Organisation's module. Please refer to Section 5 for more information.

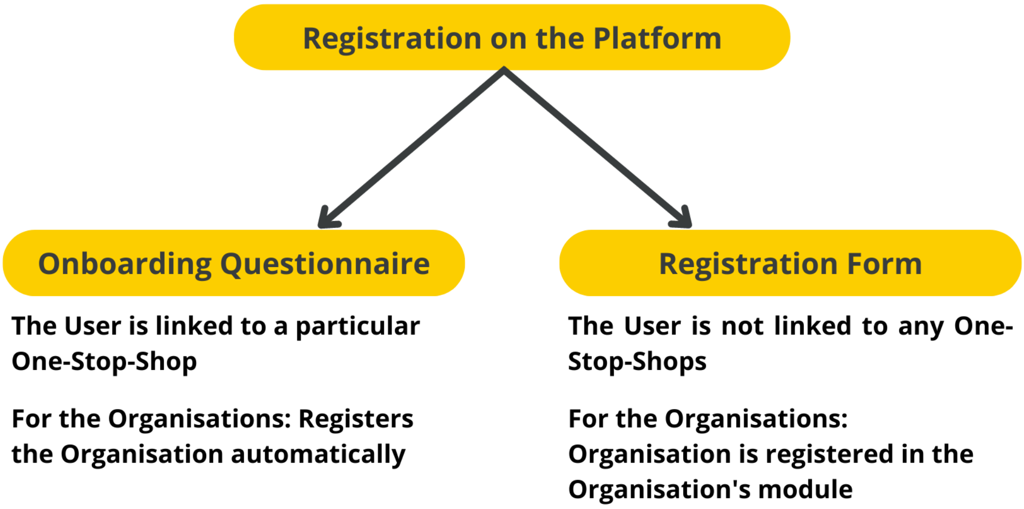

Fig. 1, Registration options on the SUNShINE Platform

2. Tools available

On the SUNShINE Platform powered by EUROPA, several tools are available: EES Calculator, EES Checklist, and EES Refinanceability Calculator. The User must be logged in to their account to access the tools. The tools are available at the top menu. In each of the tools, the User fills out the data to receive the results on a specific question. OSS also receives the results if their OSS was chosen for the tool. The general flow of all the tools is summarised in Figure 2.

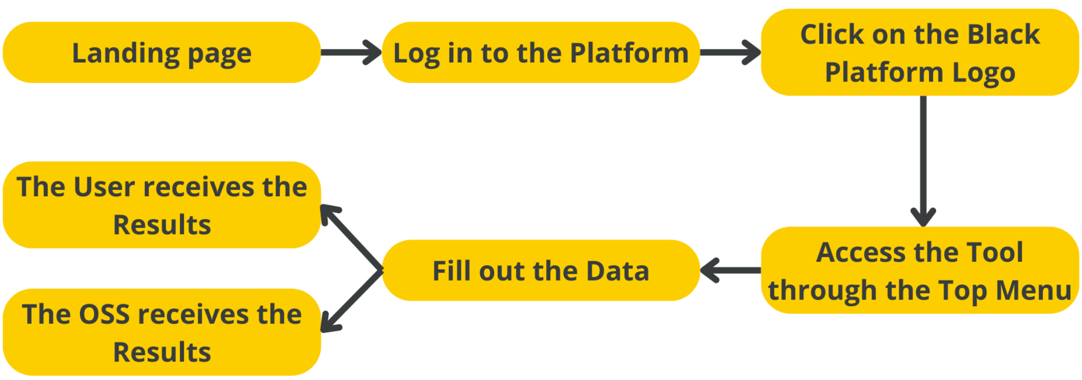

Fig. 2, The general flow of the use of the tools

As the tools are editable by the OSS, before filling out the data, the User should choose the preferred OSS. This is especially important because the OSS can edit the tools to better them for the local context. This ensures the usability of any of the checklists or calculators throughout the different climates and legislations, in which the retrofitting process may differ.

The **EES Calculator** is a calculator, which calculates the costs for the project in the whole period based on the provided costs for energy, retrofitting, and economic indicators. The results of the calculator are presented in several tables that summarise the total costs for the project, the prices of energy and its savings, and the possible distribution of costs based on two scenarios: building costs without the renovation and costs with the renovation completed.

The **EES Checklist** is a tool to evaluate the energy retrofitting project based on the requirements and standards in the areas of sustainability, standard packages for deep renovation, contractual specifications, and verification and monitoring. The general framework for the checklist is set out by the EUROPA project and is available here. After filling out the checklist, the User receives the score for the project.

The **EES Refinanceability Checklist** is a tool, which evaluates the refinancing possibilities of the energy retrofitting project and contract. Refinancing is a type of financing that accrues only after the project has been implemented. Still, as with any financing, to receive it, the project must meet the refinancing institution's set criteria. To ensure that this type of financing can be acquired in the future, the project already in the beginning must be set up in a way that matches the possible criteria. That is what this tool provides, a glimpse of how the project will be assessed from a refinancing institution's perspective in regards to risks, as well as to identify if the energy service contract has stipulations that refinancing institutions would prefer to be there. The general questionnaire is divided into seven sections, in which Sections 1-4 are a general checklist, and Sections 5-7 are questions with three possible answers. From sections 5-7 a score is assigned to the project from one to five, whereas the first four sections do not provide additional output. The checklist is made in partnership with the REFINE project and the supporting documentation is available here.

3. Dashboard

After the successful registration or logging in to the Platform, the User is referred to the Dashboard. The Dashboard summarises the data for the Organisation based on the number of employees, assets, and projects, as well as provides links to the most relevant sections on the platform. If the organisation is the OSS, the User is presented with data on the number of onboarding questionnaires and the results of the tools submitted. If the User has several organisations linked to the profile, a drop box on top is available to choose between the organisations. The data summaries represent each organisation separately.

The Dashboard is the first page, on which the notifications for the User are introduced. By clicking on the bell in the top right corner, the User can see all the unread notifications, which are related to the approval processes of different elements on the platform. To read the notification, the User must click on "***MARK AS READ***". If the User clicks on "***View all***", the notification list opens on a separate page and the User can both unread and read notifications.

Next to the notification, a User icon is placed. By clicking on it, a window is opened with several options for the User: they can go to their profile, change their password, or log out of the Platform. By clicking on the "***Profile***", a new page is opened. It summarises the data about the User: Platform, Organisation, and Project-level Roles, the Assets attached to the User, and general information about them. To change the general information, the User must click on the **Pencil icon** and, after the information is edited, click on "***Save***".

If the User wants to go to the Landing page to find the tools described in Section 2, they should click on the black logotype of the SUNShINE Platform in the top left corner.

4. Support

Before describing the Organisations, Assets, Projects, and Reporting possibilities on the Platform, we will provide the instructions for the **Support Module**. The Support Module allows the Users to interact with the OSS by directly messaging them on the Platform. The Module can be found at the bottom of the left menu. The messaging thread is initiated by clicking on "***Add New Request***". A pop-up opens with the drop box of all the OSS on the

Platform and space to describe the topic of the request. After that, the message thread is created, and the User can interact with the OSS in the message form. The members of an OSS organisation receive an email about a new message thread created.

5. Organisations

The Organisation module allows the User to Create and Operate their Organisation. The module consists of two main lists: the list of all the User's Organisations, and the list of all the Organisations on the Platform. Both lists can be filtered by the country and type of organisation, as well as searched by name.

5.1. Registering an Organisation

If no organisations are attached to the User, the only button available in "***MY ORGANISATIONS***" is "***Register an Organisation***". The registration process for the Organisation consists of three steps:

1. In the first section, the User chooses the type of Organisation and provides the necessary documentation accordingly.
2. In the second section, the User provides the information on the name and legal address of the Organisation.
3. In the third section, the User provides additional information on the Organisation such as Registration and VAT numbers, Website, Logotype, Type of Services provided, and a summary of the Organisation for the Find My Partner Module.

After the registration process is completed, the User receives the Legal Entity Appointed Representative (LEAR) role, which is the highest possible role within the organisation. The organisation itself receives "***PENDING APPROVAL***" status, which can be changed by the verification of the information and documentation provided by a Super User (SU) on the Platform. The SU can either approve or reject the organisation based on the information provided. To create the Assets and Projects on the Platform, the Organisation must be approved.

5.2. Organisation's Profile

After the Organisation is created, a separate page will open. The page contains general information on the Organisation, the list of all the meetings, the Assets and Projects linked to the Organisation, all the roles in the project, and the list of all the documents uploaded to the Platform.

The User can download and delete all the documents in the list, as well as provide new ones based on the concerns of the SU. To upload a new document, the User must either drag the document to the greyed area or click on it and then choose the correct file. After that, the User should click on "***UPLOAD***" and the document will be uploaded to the Organisation's Profile.

Additionally, the User can edit the data provided before regarding the Organisation. To do that, the User must click on the **Pencil Icon** at the top of the Organisation's profile. After clicking it, the same pop-up that appeared during the registration process will open and the User will be able to change the data. Please note that the change of the data will require uploading additional documentation for verification purposes. After editing the data, the Organisation receives "***PENDING APPROVAL***" status and requires another verification from the SU. The information on the Organisation is provided in the top left corner of the Organisation's Profile.

If the User clicks on any Organisation in the "***ALL ORGANISATIONS***", the profile with the limited information will be shown. It will contain only general information about the Organisation and its members. The User can click on the "***REQUEST A MEMBERSHIP***" for the Organisation LEAR, LSIGN, and LEAA to receive a notification and provide the membership to the User.

5.2.1. Meetings

The meeting module allows the User to register the meetings related to their Organisation. The User can create a meeting in two ways: by clicking on the "***MEETING REPORT***" in the left menu or by clicking on the "***CREATE***" in the top right corner of the Organisation's page. If the User chooses to click the "***MEETING REPORT***" button, the following actions will happen: the User must choose whether the meeting is related to an Organisation or Project and then choose the right one in both instances. After that, the process is the same for the two options: a pop-up opens, in which the User provides the necessary information and uploads the required documentation related to the event, after which clicks on "***CREATE***" and the event is created.

If the User clicks on the square, a new pop-up opens to show the full list of the events. Additionally, the possibility to export the list of the meetings to a .csv file is available.

5.2.1. Organisation's Roles

The Organisation has four roles on the Platform: Legal Entity Appointed Representative (LEAR), Legal Signatory (LSIGN), Legal Entity Account Administrator (LEAA), and Organisation Member. Each of these roles has different permissions within the Organisation.

An Organisation's Member is the lowest-level role within it. Their capabilities are limited to the registration and operation of the Assets and Projects in the name of the Organisation. The Organisation's Members cannot assign any roles within the Organisation.

Legal Entity Account Administrator (LEAA) has all the capabilities of the Organisation's Member with the addition of the possibility to assign other Organisation Members.

Legal Signatory (LSIGN) has all the same capabilities as the LEAA on the Organisational level with the addition of several new rights: the ability to assign both Organisation's Members and LEAA, the possibility to edit the information regarding the Organisation, and upload and delete the documents.

Legal Entity Appointed Representative (LEAR) is the highest-level role within the Organisation. Only one User per organisation can be LEAR. LEAR has all the aforementioned rights with the addition of assigning the LSIGN. To become LEAR of any organisation, the User should go to the Organisation's Profile and apply for the status with the provision of all the relevant documentation to state the reason to become LEAR. After the submission of the documents, the SU verifies the application before the existing LEAR accepts the change of the LEAR in the Organisation.

6. Assets

After the Organisation is approved, the Users with any role within the Organisation can create Assets. Assets represent the buildings on the Platform. If the User goes to the "***Assets***", the two lists appear - "***MY ASSETS***" and "***ALL ASSETS***". "***MY ASSETS***" represent all the Assets of the User, to which

Organisation they are a member. "***ALL ASSETS*"** show all the Assets on the Platform.

If the User clicks on the Asset in "***MY ASSETS***", the Asset's Profile opens. The profile contains the general information about the asset provided during the registration process, the Organisation, to which the Asset is attached, the Resident Community for the Asset, the Project, and the documents uploaded for the Asset.

To edit the data for the Asset, the User must click on the **Pencil Icon** at the top of the Asset's Profile. After clicking it, the same pop-up that appeared during the registration process will open and the User will be able to change the data. Refer to Section 6.1. for the Asset registration flow. After editing the data, the Asset receives "***PENDING APPROVAL***" status and requires another verification from the SU. The information on the Organisation is provided in the top left corner of the Asset's Profile.

If the User clicks ALL ASSETS, the list of all the Assets on the Platform will be provided. The User cannot go to the Asset's Profile for the Assets not attached to the Organisation that the User is not a member of. The only action available for the User is clicking on the "***I LIVE HERE***" button, which opens a pop-up for the User to provide the documentation approving it. If the Resident's Community, which is a special type of Organisation that aims to provide the Residents with the data on the project, exists, the LEAR of the Resident's Community either accepts or rejects the membership of the new User. If the Resident's Community is not registered on the platform, the Organisation, which created the Asset, receives a notification about the pending request to become a member and should create the Resident's Community.

6.1. Registering an Asset

If the User wants to register the Asset, they must click on "***Register Asset***" in "***MY ASSETS***". The Asset registration process consists of four steps. In the first section of the Asset registration, the User must choose the location of the Asset on the map. To ensure that the address was chosen correctly, in the second step the User verifies the address. In the third step, the User must choose the type of residential or non-residential building. If the User cannot find their type of residential building, they should choose "***OTHER***". In the last part of the Asset registration process, the User should input additional information on the cadastre number, area of the building, and type of heating used.

After the registration process is completed, the Asset receives "***PENDING APPROVAL"*** status, which can be changed by the verification from the SU on the Platform. The SU can either approve or reject the Asset based on the information provided. To create a Project on the Platform, both the Organisation and the Asset must be verified.

7. Projects

Projects is a separate module dedicated to the project preparation, execution, and monitoring on the SUNShINE Platform. Each of the projects contains all the required documentation for the project, contracts with the data input from the User, and summarising statistics. Each of the subsections in this chapter will describe the functionalities and flows of the capabilities in more detail.

If the User clicks on the "***Projects***" on the left taskbar, they go to the page containing two lists: "***My Projects***" and "***Public Projects***". If the User has no projects, the only two options for the User in "***My Projects***" are to "***Register the Project***" or "***Request Permission***". Project registration is described in Section 7.1. If the User wants to create a Project with another Organisation's Asset, they can click on "***Request Permission***". After it, a pop-up opens with the list of all Organisations on the Platform, from which the User must choose one. Then the second page of a pop-up opens, in which the list of all the Assets registered to the Organisation is shown. Each of the Assets has a "***Request Project Creation***" button, clicking on which will send the members of the chosen Organisation a notification regarding the request. If the request is approved, the User will be able to register the Project. The "***Public Projects***" page contains the list of all the Projects on the Platform. If the User is not linked to the Organisation or the Asset participating in the Project, they cannot open the Project page.

7.1. Registering a Project

If the User wants to work on a Project on the Platform, they must register it. To register a project, the User must click on "***Register Project***" on the "***My Projects***" page. After clicking on it, a pop-up for the Project registration opens.

The registration process has three steps. In the first step, the User selects the Organisation they want to register a Project for as well as chooses consortium Organisations if there are any. In the second step, the User chooses the Asset, which is registered to any of the Organisations selected during the first step. In the third step, the User must provide information on the number of years of the planned intervention, the period of the construction works, and the first year of the contract. After clicking on "***Finish***", the Project Overview page opens and the User registering the Project receives a Project Manager (PM) status. Both the page and Project Roles are described in Section 7.2.

Please note that the Project does not need verification from the Super User (SU), since both the Organisation and Asset are approved before. The Organisation with "***Pending Approval***" or "***Declined***" status cannot create or operate the Project, whereas the project cannot be registered to the Asset with the same status.

7.2. Project Overview

On the Project page, the Project Overview is the first page to be seen by the User. Project Overview has two sections: "***For Team***" and "***Project Manager Dashboard***".

7.2.1. For Team page

"***For Team***" section contains the summary information on the Project, which was provided during the registration process, summary statistics from the inputs of the contracts (Refer to Section 7.4.), the Meetings Module, and which Project Phases are completed. (Refer to Section 7.3.)

On this page, the User can add a meeting related to a particular Project. To do that, they must click on the "***CREATE***" button, after which a pop-up opens. After providing the required information and uploading related documents, to create a meeting the User must click "***CREATE***" for the second time. A separate page for the meeting opens, in which the User sees the information already provided. Additionally, the User can add Meeting Objectives, Notes, Link to the Digital Meeting, a List of Participants, and a Signed Meeting Protocol or Survey. To add a Participant the User must click on the "***ADD PARTICIPANT***", after which a separate pop-up opens, and they must feel in the data. After filling in the data, the User must click on the "***OK***" button and the participant is successfully added. The list of all the participants is shown as a table with all the information. To add a relevant document, the User must drag it to the dedicated space in the bottom right corner of the screen or click on the space and find the document on their device. All the documents are also shown on the list and could be deleted by clicking on the trash can icon. To save the changes to the meeting, the User must click on the "***SAVE***" button. To go back, the User can click either on the "***GO TO PROJECT***" or "***GO TO ORGANISATION***" buttons to go to the Project Overview or Organisation's page respectively.

7.2.2. Project Manager Dashboard

The Project Manager Dashboard is a separate page for managing the Project Participants. The page contains all the uploaded documents to the Platform, and a more detailed look at the project milestones (Refer to Section 7.3.)

Team Member (TEME) is the lowest level role in the project. TEME can read all the information and documents in the project as well as upload the required documents in the Project Phases section.

Task Manager (TAMA) is the middle-level role in the project. In addition to the capabilities of TEME, the TAMA can update the project information provided during the project registration, create meetings, delete project files, and update the fields in the project contracts.

Project Legal Signatory (PLSIGN) is the second highest level role in the project. In addition to all the TAMA capabilities, PLSIGN can confirm milestone completion on the Project Phases page.

A Project Manager (PM) is the highest-level role in the project. In addition to all the capabilities of PLSIGN, the PM can assign roles within the project as well as confirm that the contract was signed for the project.

Forfaiting Contact Person (FCP) is a separate role within the project ecosystem. FCP supports the preparation of the Forfaiting Application of the project. Refer to the Subsection 7.3.1. for more information on the Forfaiting Application. Other capabilities of FCP are the same as those of the TEME.

To assign the role for the project, the User must click on the role they would like to grant and input the email address of the User registered on the Platform. After that, the User clicks on the "***ASSIGN***" button and the User is successfully added to the project. The added member of the project receives a notification about a new role assigned to them.

7.3. Project Phases

The Project Phases is a separate module on the Platform, which systematises the dwelling renovation journey for the User. This process simplifies the project preparation, execution, and monitoring due to the linear progression of the tasks. Additionally, it allows for storing and providing relevant documentation to all the stakeholders within the project, which increases the transparency of the work.

On the Platform, the Project has three phases: Asset Acquisition Phase, Work Phase, and Maintenance and Monitoring Phase. Each of these phases contains multiple milestones within them, which are further divided into multiple steps. This division allows the linearity of the process and simplification for the Users. The Asset Acquisition Phase represents the initiation of the project from the first meeting with the Residents up to the signed contract for the retrofitting works. The Work phase represents the construction work and associated maintenance and financial activities. The Maintenance and Monitoring Phase includes sections related to the verification and monitoring of energy savings, maintenance activities, and payments. The list of all the milestones is provided in **Figure 3**.

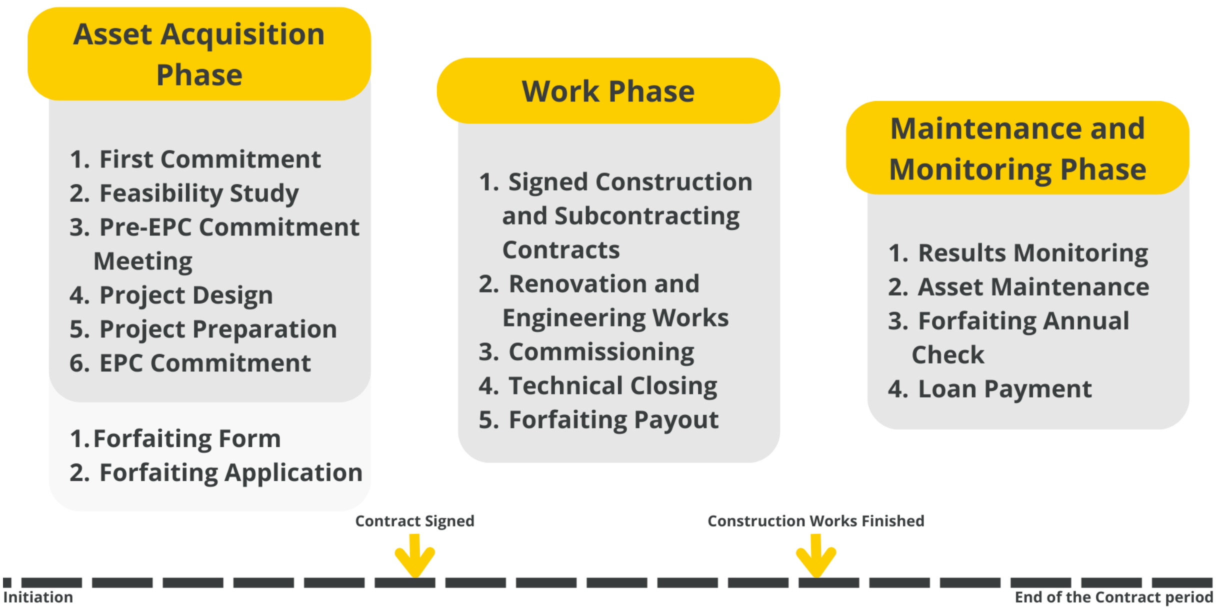

Fig. 3, The summary of the milestones and phases on the Platform

To complete a milestone, all the required fields within it must be filled in. This would require either an upload of the document, filling out the additional data in the contracts, or the creation of the meeting. To upload the document to the dedicated step, the User must click on the **ADD FILE** then choose the right file and click "***UPLOAD***" after. After clicking on the "***UPLOAD***" button, the file appears under the name of the step. The User can either download or delete the documents with the buttons next to them. After all the required steps are done, the User can click on the "***COMPLETE MILESTONE***". The pop-up with the verification of the completion will appear. To complete it, the User must click for the second time on the "***COMPLETE MILESTONE***" button.

After all the milestones have been completed, the User can complete the phase. To do that, the User must click on the "***COMPLETE PHASE***" button on the last milestone of the project. After it, an additional pop-up is shown for confirmation. Additionally, during some of the latter milestones, to complete the step additional verification by the Fund Manager is required. To learn more about the Fund Manager refer to Subsection 7.3.1.

At the bottom of each milestone page, two additional boxes are available: the upload of other documents and the comments. In the "***Other Uploads***", the User can add any additional documents related to a particular milestone but not mentioned as a required step. The uploading procedure is the same as for the documents in the steps of the milestone. After uploading the document, it appears in the list of all the documents, from which it can be downloaded or deleted. Next to the Other Uploads, the comment section for the milestone is available. If the milestone is completed, an automatic comment is created with the name of the milestone and the date of completion.

7.3.1. Forfaiting Form and Application

If the project is in the country eligible for the project, after completing the third milestone in the Asset Acquisition Phase, the Forfaiting application form is opened. The Forfaiting Application can be found under the list of the milestones in the Asset Acquisition Phase, or as a separate button in the Project Preparation milestone. By clicking on it, a separate pop-up opens, in which the User must provide the financial information and additional documentation. Also, the applicant can select the Forfaiting Process Manager (FPM) for the project.

After the application form is submitted, the User is sent to the Forfaiting Application page, which summarises the provided information. The application form undergoes the approval process for five different criteria by the Fund Manager of the Platform. The Fund Manager is a country-level role on the platform, which is responsible for the verification of the forfaiting applications and is represented by individuals in the financial sector. The five sections for approval are EPC contract, Technical, Legal/Eligibility, Financial, and Executive.

After all the sections are reviewed and approved, the project becomes eligible for the forfaiting. On the top right corner of the Forfaiting Application, the "***DOWNLOAD|PRINT***" button is available for the User to do the actions.

7.4. Project Contracts

The Project Contracts are a dedicated section in the Project Module for the EPC and forfaiting agreements to be reviewed, stored, and filled out by the User. The Project Contracts contains five subsections: EPC Special Conditions, EPC Annexes, EPC General Terms and Conditions, Forfaiting Agreement, and Contract History. Each of these contracts has both English and state language versions. The state language version is provided by retrieving the country of the Asset. Except for the Contract History, at the top right corner of each subsection, a button to download the contract is available for the User.

The **EPC Special Conditions** page contains the summary of the project-specific information on the liabilities and the total costs of the project. The data input on the page is minimal due to the data retrieval from other parts of Project Contracts and Project Phases.

The **EPC Annexes** page contains all the information supporting the EPC Special Conditions, which is required for the project preparation. This section both retrieves the data from the Project Phases as well as requires additional inputs from the User to use in other parts of the Project Module. The annexes include the budget for the work, comfort standards, the results of the energy audit, the maintenance plan, and renovation fees. If the User wants to input the data in any table, they should type the inputs first and then click on the "***SAVE***" button. During some of the milestones, such as in the Technical Closing, the data input to the EPC Annexes is obligatory.

The **EPC General Terms and Conditions** page does not require additional input from the User. This page is dedicated to stating all the general parts of the contract for the User to read and understand them.

The **Forfaiting Agreement** page has several subsections created with the same logic as the **EPC Contract** pages.

The **Contract History** is a page to upload and store the contracts. The page has two subsections - **Energy Performance Contract** and **Signed Forfaiting Agreement and Amendments**. Both the signed contract appear on these pages, as well as the uploading of the amendments is possible by clicking on

"***ADD FILE***", then choosing the correct file from the device, and clicking on "***UPLOAD***". The uploaded document will appear in the list of documents with the date. The User can view the document by clicking on its name.

8. Reporting Module

The Reporting Module allows the User to summarise the data on a particular part of the Platform. The User can retrieve the data on the Assets, Organisations, Projects, and Users their profile is related to based on their participation in Organisations. On the top taskbar, the User can choose between these categories. In each of the categories, the User can choose between multiple data points to show. To choose the categories of data shown, the User must click on a checkbox. All the selected criteria will be displayed below. By clicking on the "***EXPORT***" button, the User can export the data as a .csv file.

9. OSS Toolkit

As mentioned in the Introduction, the update of the SUNShINE Platform enables the work of OSS with the addition of personalisation capabilities. OSS Members can track the progress of the questionnaires submitted in a specialised Dashboard, edit and localise the tools provided by the Platform for other Users, and review all the results of the questionnaires and tools submitted.

OSS Organisations have a separate dashboard developed to portray the summary statistics of the submission of the questionnaires in each of the categories - Residents, Housing Associations, and Operators -, and the tools. The right menu of the page provides direct links to the editing of the OSS tools and questionnaires. At the bottom of the page, the link to the Records is provided, in which the members of an OSS organisation can review the submitted responses.

Either clicking on the link in the Dashboard or going to the Simulation Tools or Onboarding and clicking on the right one, the editing form is opened. On the left section of the screen, the User can add separate subpages for the questionnaires and tools by clicking on the "***PLUS***". At the top of the editing form, the different language options are provided, from which the User can choose. On the right side of them, three buttons are available: the "***PREVIEW***" button allows the User to open the questionnaire or tool as a regular User and test it, the "***BACKUP***" button allows the User to save the current version of the questionnaire or tool, and the "***SET DEFAULT***" button allows to set the default version of the questionnaire or tool set out by the SU. By clicking on "***BACKUP***" or "***SET DEFAULT***" a separate pop-up opens, in which the User confirms their action. If the User wants to save the backup before setting the default template of the tool, they must do it separately – the "***SET DEFAULT***" button does not automatically save the latest version of the questionnaire or tool. The User can add questions or answers by clicking on the "***PLUS***" button in the middle of the form.

In the menu on the left, the User can go to the Backup page. The page contains all the versions of the questionnaires and tools that were backed up. The User can restore any of the backed-up versions of the tool by clicking on the "***RESTORE***" button and confirming the choice. At the top of the page, the User can select a specific tool or questionnaire to filter from the drop box.

On the left menu, the User also can go to the Records page to look at the submitted forms. On the page, the responses for all the tools are provided. To filter the tools, the User can click on the drop box on the top and choose the tool by name. The list of all the tools provides general information about the User that submitted the form. To look at the results in detail, the OSS team member can click on the submitted form and look at all the answers, except for the submitted password during the registration on Onboarding questionnaires. As OSS team members have the access to the results, they can contact other Users to proceed with their joint work on the retrofitting project.

Thank you for your interest in the use of the SUNShINE Platform powered by EUROPA. We wish you all the best in your retrofitting project!

The end of the document.