

Deliverable 4.3

UP-STAIRS Digital Information Platform Training Guide

Training Guide

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 891775

D4.3 UP-STAIRS Digital Information Platform Training Guide



Project details			
Project acronym	UP-STAIRS	Start (Duration)	1 September 2020 (36)
Topic	LC-SC3-EC-1-2018-2019-2020 The role of consumers in changing the market through informed decision and collective actions		
Call identifier	H2020-LC-SC3-EE- 2019	Project Number	892037
Coordinator	University College Cork – National University of Ireland Cork (TYN)		
Contact person	Pádraig Lyons	Website	www.h2020-upstairs.eu

Deliverable details			
Deliverable Number	4.3	Title	UP-STAIRS Digital Information Platform Training Guide
Work Package	WP4: Creating UP-STAIRS digital tool to facilitate individual interactions and collective actions	Dissemination level	Public
Deliverable responsible	GCN	Contributing beneficiaries	All
Due Date (M)	30.11.2023 (M39)	Submission date	30.11.2023 (M39)

AGENDA

Digital Information Platform Training Guide



1. Targets of the UP-STAIRS Digital Information Platform
2. Timeline for the development of the UP-STAIRS Digital Information Platform Training Guide
3. Description of the different User Groups of the UP-STAIRS Digital Information Platform
4. The User-Journey for Stakeholders of the Digital Information Platform
5. Use Cases of the UP-STAIRS Digital Information Platform
6. Administration of the UP-STAIRS Digital Information Platform

Names, roles, abbreviations

- **Digital Information Platform (DIP)** – Separate part of the Digital Platform, accessible only for restricted users holding training- and information materials about the UP-STAIRS Service Framework, Trainings etc.
- **Users** – General expression for people using the functionality of the UP-STAIRS digital platform and Digital Information Platform (users can be citizens, SME's, OSS operator staff, Implementation Champions)
- **Citizens** – One group of users
- **Operators** – Operators of One-Stop-Shops who are setting up and managing the OSSs
- **SME's** – Small and midsize Enterprises
- **IC** – Implementation Champion
- **GCN** – UP-STAIRS partner and responsible for the digital platform and Digital Information Platform (development, changes, new features, support)
- **OSS** – One-Stop-Shop
- **CRM** – Customer relationship Management (system). For UP-STAIRS, the CRM system “Microsoft Dynamics” is used
- **RE/EE** – Renewable Energy / Energy Efficiency
- **Room/ project-room** – The word “room” is used for project-related areas in the post-registration area of the digital platform, where citizens/SME's are gathered to work together with an IC on collective RE-/EE-measures
- **KPI** – Key Performance Indicator, an expression for key figures that relate to the success, performance or utilization of a RE-/EE-project on the OSS digital platform (e.g. saved kWh, renovated m², CO₂ saved,...)

How can the DIP be reached?

The DIP as part of the Digital Platform can be reached in 2 different ways

1. General landing page

Through the general landing page for all OSSs the DIP can be reached:

<http://www.upstairs-energy.com>

There, a selector is available to forward users towards the Pilot website they want to visit.

2. Pilot specific landing pages

Within each Pilot website, the DIP can also be reached directly

AMB/Spain

<http://www.upstairs-energy.com/ca-es/amb>

CCC/Ireland

<http://www.upstairs-energy.com/en-ie/ccic>

ESV/Austria

<http://www.upstairs-energy.com/de-at/esv>

ASEN/Bulgaria

<http://www.upstairs-energy.com/bg-bg/asen>

Rhodope/Bulgaria

<https://www.upstairs-energy.com/bg-bg/rhodoshop>



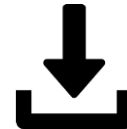
Targets of the UP-STAIRS DIP

The **UP-STAIRS DIP** is a repository for all UP-STAIRS training materials, training session recordings and UP-STAIRS service model framework presentations to be used by Operators and Implementation Champions to learn or educate others about the UP-STAIRS project.



OSS office

Operators and/or IC's @
Municipality, Community,
Region (of OSS)



Digital Information Platform

Provided information available
as download @
www.upstairs-energy.com



Interaction

Information materials to
be used to learn and/or
educate others



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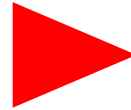
Targets of the UP-STAIRS Digital Information Platform

The DIP is available within the **Post-registration** part of the UP-STAIRS Digital Platform

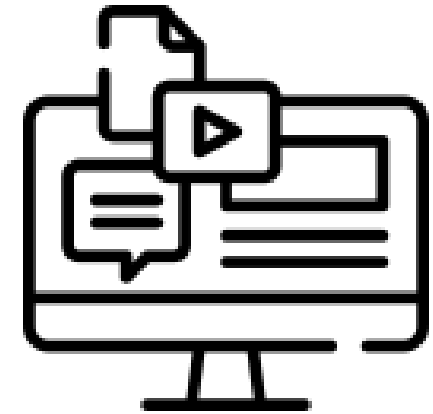
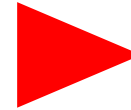


Pre-Registration part

General information about OSS and services offered



Sign Up



Post-Registration part

Database within Microsoft OneDrive to store all relevant training- and service framework materials



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User Groups of the Digital Information Platform



UP-STAIRS AUTHORITIES

These can be Municipalities or public administration bodies or energy savings associations who act as the operator of an OSS.



IMPLEMENTATION CHAMPIONS

Implementation Champions are the counterparts of the citizens interested in RE/EE measures. They initiate projects, administer the digital platform and deliver technical, financial and / or legal advice. The specific profile of the IC's depends on each pilot region.



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User Groups of the digital platform



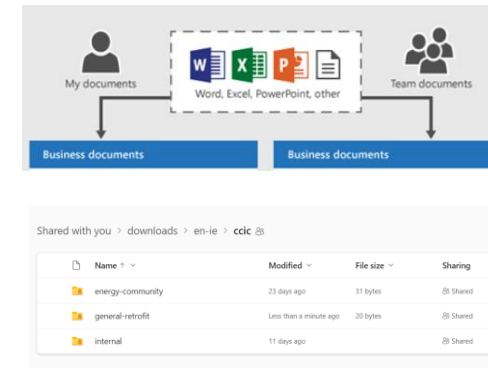
UP-STAIRS local authorities (Municipalities, Energy Associations or others) are the Operator of the OSS and oversee its entire operation



Operators and/or IC's access the frontend of the digital platform to log in



Digital Platform Frontend
www.upstairs-energy.com/pilot



Digital Platform Backend
In Microsoft Dynamics and Microsoft OneDrive



Operators and/or ICs access the Information Platform through their OSS specific project room(s)



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Use Cases of the UP-STAIRS DIP

- A use case is a **description of how a person who actually uses a process or system will accomplish a goal.**
- The use cases we will introduce in this training manual for the UPSTAIRS Digital Information Platform will **describe how users perform core tasks.**
- We will describe the core use cases, available with the DIP.
- The main purpose of the DIP is to provide future Operators and IC's **a place to up- and download information about how to set up, operator a OSS and how to train themselves and other in doing so.**



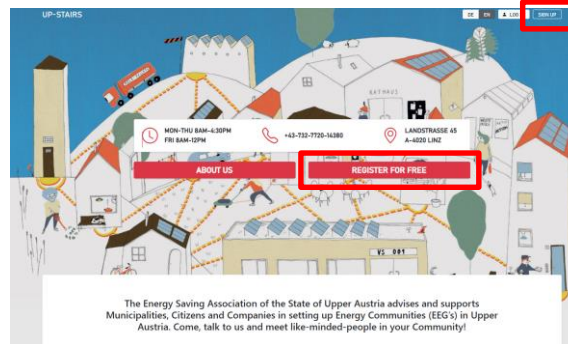
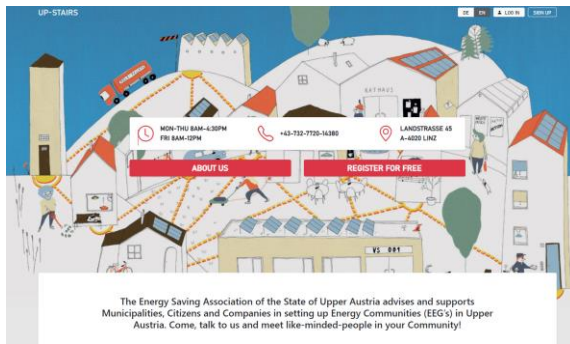
Pre-registration use cases: Sign up

An Implementation Champion or employee of the OSS Operator wants to sign up on the UP-STAIRS platform.

1. Go to OSS homepage

2. Click on one of the several options to register on the digital platform

3. Fill in the Sign-up page. After submitting the page, a confirmation E-Mail will be sent

A screenshot of the "SIGN UP" form. It includes fields for "Your name", "Email address partner", and "Password". Below these are "OPTIONAL" fields for "How do you live?" and "I am owner". At the bottom are "CONTINUE" and "CANCEL" buttons.

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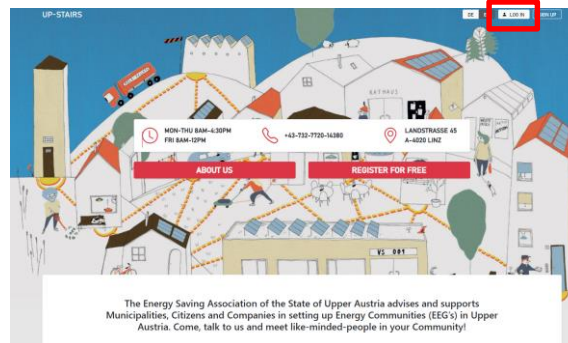
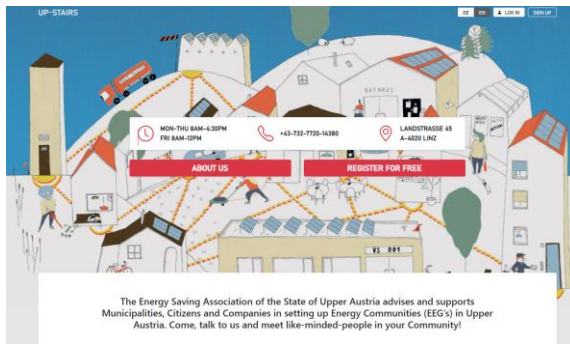
Pre-registration use cases: Log in

An Implementation Champion or employee of the OSS Operator wants to log in to the UP-STAIRS platform.

1. Go to OSS homepage

2. Click on the **Log in** button in the top right corner

3. Enter the E-Mail address and the Password and click submit to access the digital platform

A screenshot of the 'SIGN UP' form on the UP-STAIRS platform. The form includes fields for 'Your name', 'Email address partner', and 'Password'. Below these fields, there is a location selector set to 'Munich, DE'. Under the 'OPTIONAL' section, there are dropdown menus for 'How do you live?' and 'I am owner'. At the bottom, there are 'CONTINUE' and 'CANCEL' buttons.

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Post-registration use cases of the platform

- The UP-STAIRS digital platform will be the **operational and technical information source** for the UP-STAIRS Energy Service model framework.
- The **Digital Information Platform** is established within the Digital Platform.
- To prevent Implementation Champions or employees of the OSS Operator to use an additional way to enter the Digital Information Platform, the document repository of the UP-STAIRS digital Platform will be used to store all relevant documents.
- Only Implementation Champions or employees of the OSS Operator will be able **to access, add or delete documents** on the Digital Information Platform



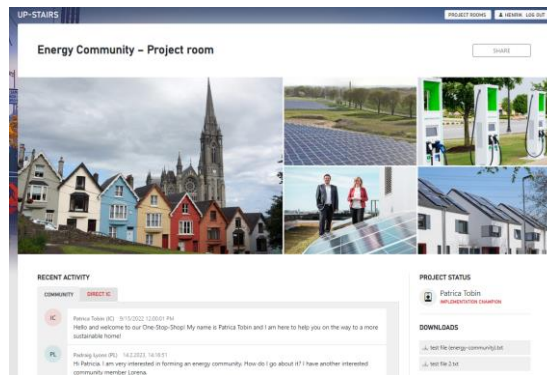
Post-registration use cases: Access the Digital Information Platform

An Implementation Champion or employee of the OSS Operator wants to access the DIP

1. In the project-room the IC or employee of the OSS operator can see the download area and an initial set of documents in the right column

2. By clicking on one of the documents, a new browser window opens and the document library can be accessed (OneDrive)

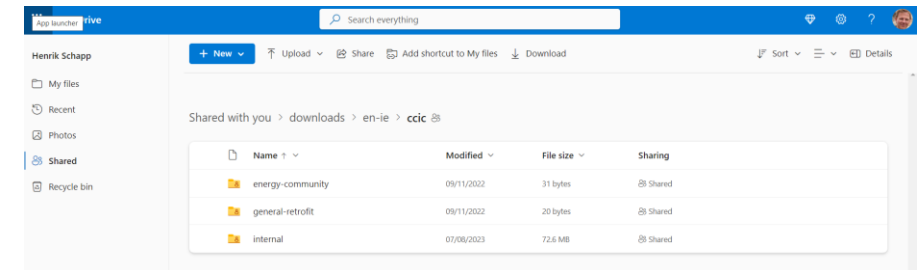
3. Here, all folders from a specific OSS can be accessed (Project room folders and one OSS internal folder)



DOWNLOADS

test file (energy-community).txt

test file 2.txt



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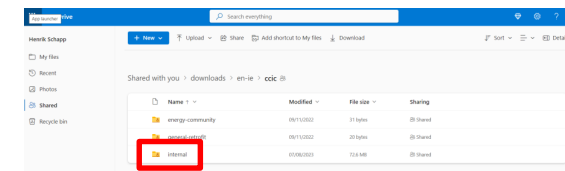
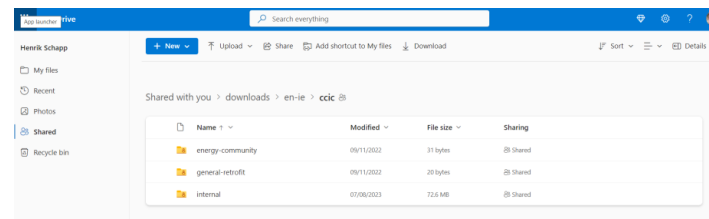
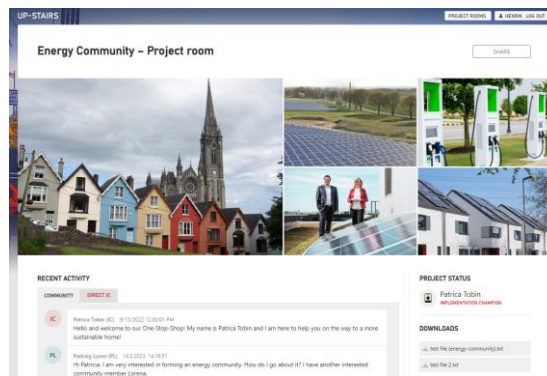
Post-registration use cases: Access the internal folder structure of the Digital Information Platform

An Implementation Champion or employee of the OSS Operator wants to access the internal folder structure of the DIP

1. In the project-room the IC or employee of the OSS operator can see the download area and can access the document area by clicking on one of the documents.

2. Here, all folders from a specific OSS can be accessed (Project room folders and one OSS internal folder).

3. By clicking on the 'internal' folder of the OSS, the DIP, can be accessed.



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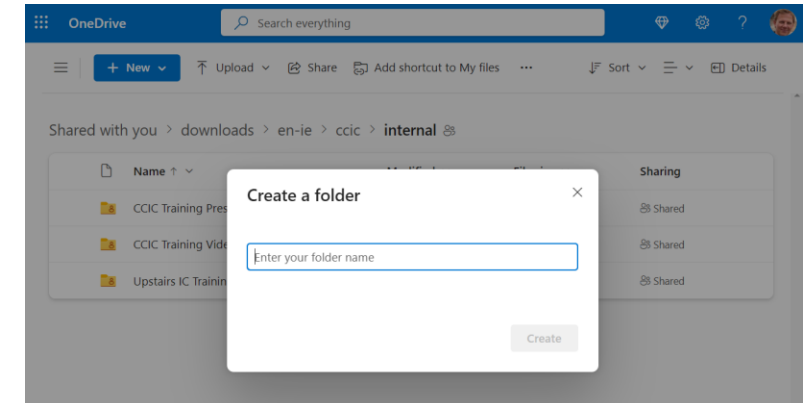
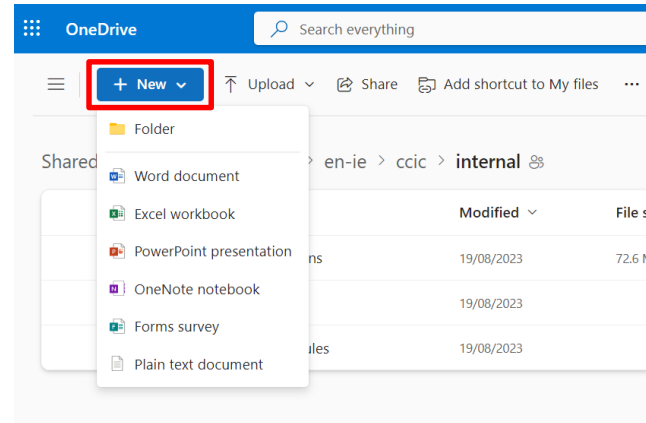
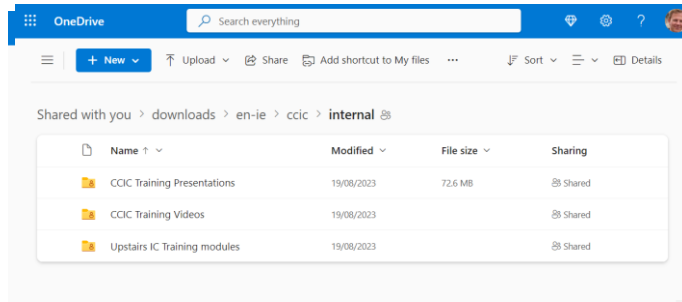
Post-registration use cases: Create/ add folders to the DIP

An Implementation Champion or employee of the OSS Operator wants to create folders and upload documents to the internal folder structure of the DIP

1. From the project-room the IC or employee of the OSS operator can go to documents > One Drive document area > internal folder of the specific OSS.

2. In the internal folder of the DIP, IC's or employees of the OSS operator can add folders by clicking the 'New' button, followed by clicking on 'Folder'

3. The name of the new folder can be chosen and the folder created by clicking on 'Create'.

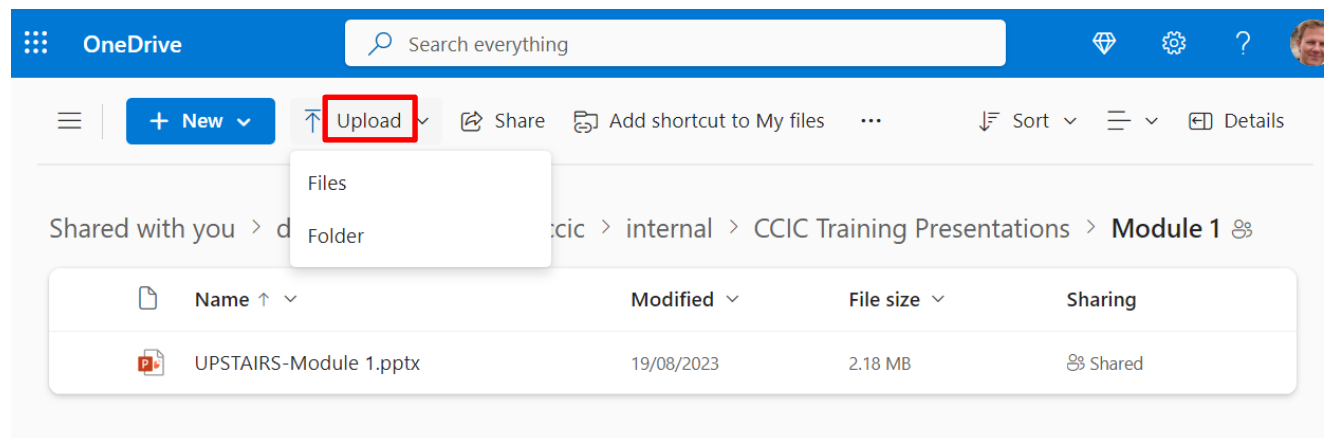
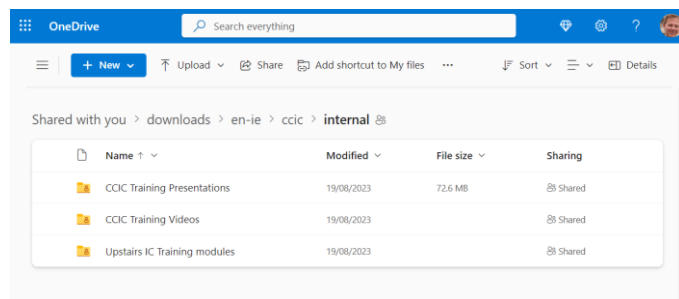


Post-registration use cases: Upload documents to the DIP

An Implementation Champion or employee of the OSS Operator wants to create folders and upload documents to the internal folder structure of the DIP

1. From the project-room the IC or employee of the OSS operator can go to documents > One Drive document area > internal folder of the specific OSS.

2. Within a folder, documents in that specific folder are displayed. Adding new documents can be done by clicking on 'Upload' > 'files'. After that, the Explorer opens and a specific file/ document can be chosen to be added to the folder.



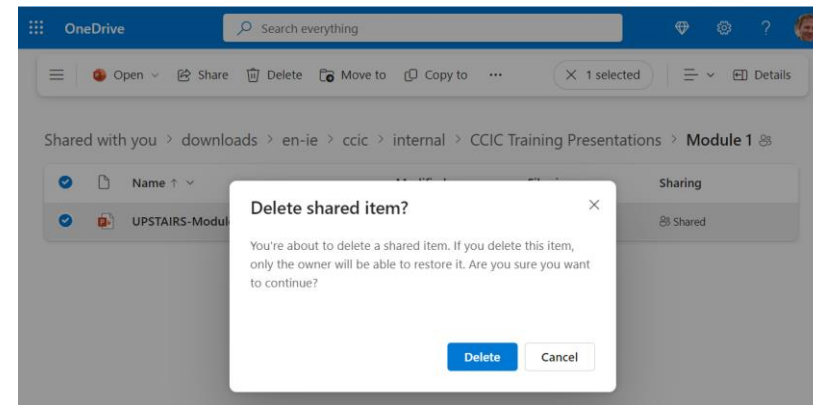
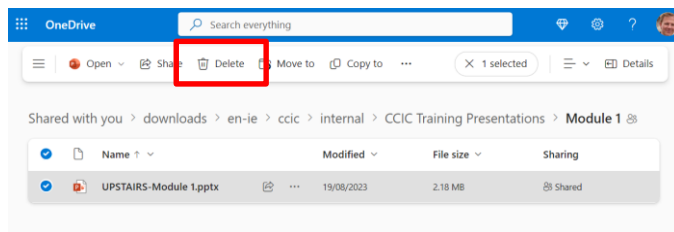
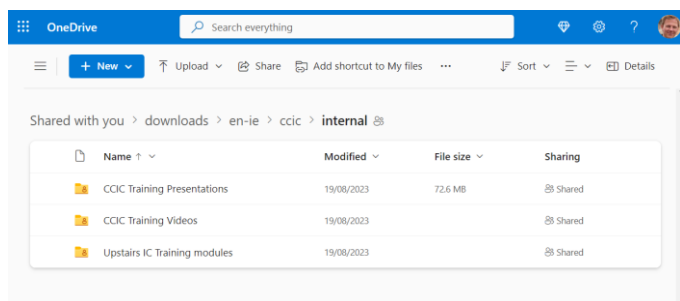
Post-registration use cases: Delete documents from the DIP

An Implementation Champion or employee of the OSS Operator wants to delete documents from the internal folder structure of the DIP

1. From the project-room the IC or employee of the OSS operator can go to documents > One Drive document area > internal folder of the specific OSS.

2. Within a folder, documents in that specific folder are displayed. To delete a document, the respective file needs to be marked by clicking the button in front of the document and after that on the 'delete' button.

3. To confirm the deletion of the document, the button 'Delete' in the pop up needs to be confirmed / clicked on.



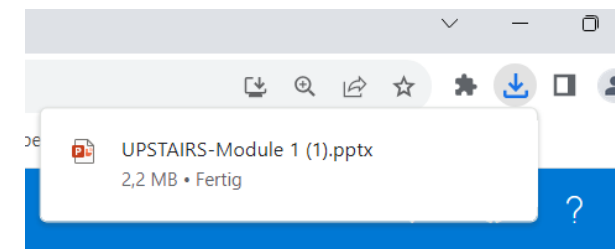
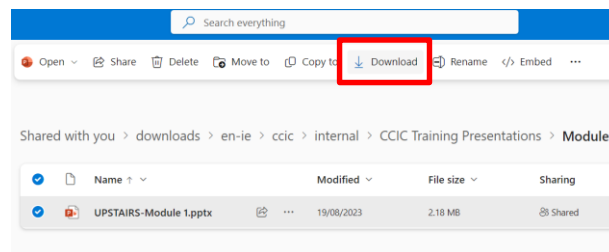
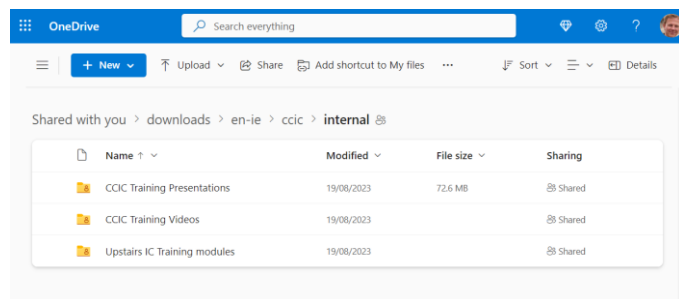
Post-registration use cases: Download documents from the DIP

An Implementation Champion or employee of the OSS Operator wants to download documents to the internal folder structure of the DIP

1. From the project-room the IC or employee of the OSS operator can go to documents > One Drive document area > internal folder of the specific OSS.

2. Within a folder, documents in that specific folder are displayed. To download a document, the respective file needs to be marked by clicking the button in front of the document and after that on the 'download' button.

3. The respective document will be downloaded and is available in the Downloads folder of the Explorer.

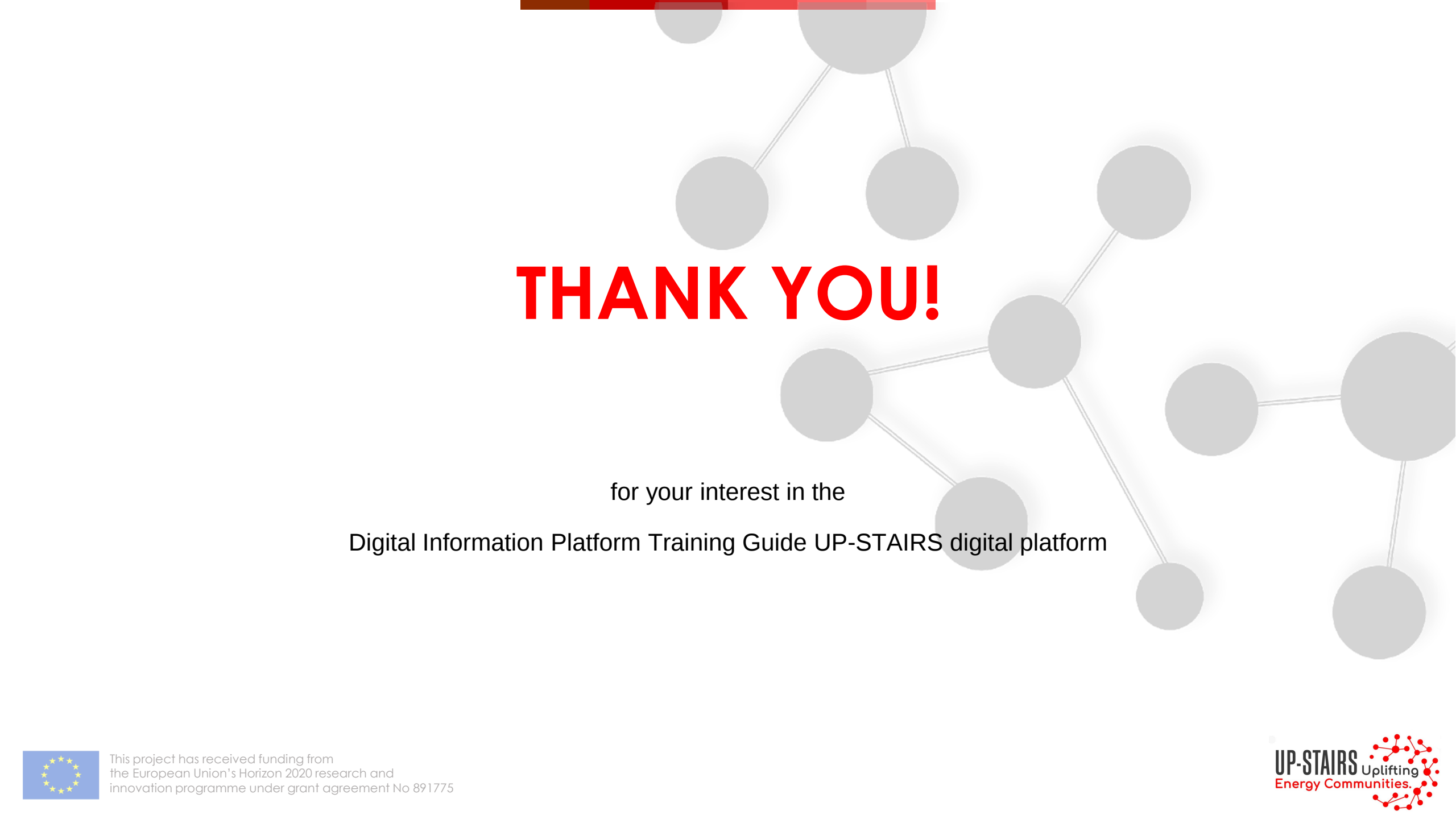


Administration of the UP-STAIRS Digital Information Platform

- GreenCom Networks leads the **development of the Digital Information Platform** (web and mobile application) as well as **testing the platform, editing content and adding tools and features**.
- Once the DIP goes live, there are different ways to **change** or **add** content and tools on the platform.
- The **administration** of the DIP in regular **operation is carried out by the operator of the OSS or the Implementation Champion(s)**.

For all inquiries regarding the operation and set up of the DIP, please send a descriptive E-Mail of what you want to achieve to: info@upstairs-energy.com





THANK YOU!

for your interest in the
Digital Information Platform Training Guide UP-STAIRS digital platform



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