



Deliverable 4.2:

User Guide

for the SHEERenov+ online platform

supporting the activities of the one-stop

shops

Responsible partner: EnEffect

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Executive summary

The SHEERenov+ web platform, available at www.sheerenovplus.eu, has been developed as a digital tool to support the energy renovation of residential buildings in Bulgaria through the model of One-Stop Shops (OSS). It offers a wide range of public and internal functionalities targeted at citizens, partners, OSS operators, and administrators. Key modules include an online calculator for assessing energy efficiency, a document library, a database of best practices, a visual map of renovated buildings, individual OSS pages, and a register of trusted partners.

This user guide systematizes the use of the platform, presenting access to content, the different types of users, and the way they interact with the platform's main components. It includes instructions for registration, navigation, document submission, profile management, and content maintenance – both for external users and for administrators and OSS experts. Special attention is given to the admin panel and the internal OSS module, which provide control, traceability, and coordination throughout the renovation process.

The document also covers the platform's security mechanisms, personal data protection, and technical support procedures. It outlines the processes for system monitoring, maintenance, data archiving, and feedback collection – all essential to ensuring platform stability and continuous improvement.

The main goal of this guide is to facilitate the effective use of the platform by all target groups and to contribute to the sustainable development of the digital infrastructure supporting the renovation of the building stock in Bulgaria. The SHEERenov+ platform is designed for future upgrades and adaptation to evolving regulatory and market conditions, and serves as a foundation for scaling up the OSS model at the national level.

1. Introduction

The SHEERenov+ project introduces an innovative web-based platform designed to support the implementation of the One-Stop Shop (OSS) model and to facilitate access to services related to the energy-efficient renovation of residential buildings. By combining public information, interactive tools, and internal modules for expert and administrator use, the platform provides a comprehensive digital environment for communication, analysis, and management of the renovation process.

The purpose of this user guide is to provide a clear and structured overview of all platform functionalities, covering both public-facing modules and the administrative environment accessible only to registered operators, partners, and administrators. It describes the main features, the interface, and how different types of users interact with the platform's content.

This guide is intended for all user groups:

- **Homeowners** seeking advice and assessment for the renovation of their property;
- **Potential partners** interested in joining the OSS network;
- **OSS operators** responsible for coordinating renovation activities;
- **Platform administrators** managing content and technical maintenance.

The document is available in both Bulgarian and English, in digital format, suitable for use by end users as well as by teams responsible for the platform's maintenance and future development. The guide will be updated with every major change in platform functionality.

2. Core Principles and Platform Architecture

The SHEERenov+ platform is developed in line with modern standards for web-based applications, ensuring high levels of reliability, security, and accessibility for different user types. The system is designed to operate without the need for any additional software installation — all features are accessible through a standard web browser, on both desktop and mobile devices.

2.1. Modular Architecture

The platform is structured into distinct modules, each corresponding to a specific functionality and capable of evolving independently from the others. This architecture:

- simplifies maintenance and future upgrades;
- allows new services to be added without disrupting existing components;
- ensures high system stability, even under heavy user load or with large data volumes.

2.2. Object-Oriented Approach

An object-oriented programming approach is applied, with an emphasis on **SOLID** principles. This ensures:

- clearer logic within the system;
- easier error tracing and debugging;
- better adaptability to future regulatory or market changes.

2.3. MVC Architecture

The platform follows the **Model-View-Controller (MVC)** architecture, which separates:

- the **application logic** (Model),
- the **user interface** (View),
- and the **navigation and input control** (Controller).

This separation supports:

- faster UI development and updates;
- independent development of components;
- better traceability of system functions and behavior.

2.4. User Types and Access Levels

The system defines four main user types:

User Type	Access Level	Key Functions
Administrator	Full access	Manage content, approve registrations, control all modules
OSS Operator	Extended access	Work with internal modules, process data, communicate with partners
Partner	Limited access	Register, maintain a profile, participate in local projects
General User	Public access	Use the calculator, browse documents, explore OSS and partners' information

With this flexible role management system, the platform simultaneously offers:

- a personalized experience for each user group;
- strict control over sensitive information access;
- full compliance with **GDPR** data protection regulations.

3. User access and registration

The SHEERenov+ platform supports both **public access** to its informational modules and **personalized functionalities** available only after registration and login. The registration process is simple and tailored to different types of users – homeowners, potential partners, OSS operators, and administrators.

3.1. Public Access

Any visitor to <https://sheerenov.demo.min.solutions> can access the following features without the need to register:

- Home page with visual access to the main modules;
- Online energy efficiency calculator;
- Document library;

- Interactive map of serviced buildings;
- Information about OSS centers and registered partners;
- Best practice case studies;
- News section.

3.2. User Registration

To access additional platform features (e.g., saving calculator results, applying to become a partner, or accessing administrative modules), users must create an account. This process includes:

- Clicking the **“Login/Register”** button;
- Entering an email and creating a secure password;
- Confirming the registration via a verification link sent by email;
- Completing the user profile based on the selected role.

3.3. User Roles

Upon registration, users are assigned roles depending on the purpose of their access request. The following roles are defined:

User Type	Registration From...	Required Information	Activated By...
Basic User	Registration form	Name, email, password	Automatic
Partner	"Become a Partner" module	Organization data, documents	Assigned OSS center
OSS Operator	Administrator	Created by platform administrators	Platform administrator
Administrator	By project team	Full access rights	Managed by EnEffect team

3.4. Login and Profile Management

Once registered, users gain access to a **personal profile** page, where they can:

- Edit contact and organizational data;
- Change their password;
- View their activity history;
- Download documents or saved calculator results.

Security features include:

- Auto logout after inactivity;
- Password reset functionality;
- Notifications upon changes to sensitive account settings.

4. Key Functionalities by User Role

The SHEERenov+ platform offers different access levels and functionalities depending on the type of registered user. This allows for both the dissemination of public information and the management of complex administrative processes related to the operation of One-Stop Shops (OSS).

4.1. General User (Homeowner)

General users can browse the platform without registration or create a personal profile for enhanced functionality. Their main options include:

- Access to the **energy efficiency calculator**, with the ability to save results;
- Viewing **documents and best practice examples**;
- Exploring the **interactive map of renovated buildings**;
- Learning more about **OSS centers and registered partners**.

4.2. Partner

Registered partners have access to expanded platform capabilities, including:

- Creating and maintaining an **organizational profile**;
- **Uploading documents** and selecting preferred OSS centers for collaboration;
- Participating in the platform as a **service provider** (e.g., for RES, energy audits, engineering, construction);
- Receiving updates and feedback from the respective OSS center.

4.3. OSS Operator

Operators at One-Stop Shops use both the public-facing and internal components of the platform. Their responsibilities include:

- Managing the **individual OSS center page** – team, services, news, contacts;
- Using the **internal (non-public) module** – maintaining building files, generating documents, recording events and consultations;
- Communicating with homeowners and partners;
- Approving or rejecting partner registration requests;
- Generating **reports and summaries** related to OSS operations.

4.4. Administrator

Administrators have full access to all system features, including:

- Managing **user accounts and roles**;
- Moderating and approving content such as news, documents, and partner registrations;
- Performing **technical control and diagnostics**, accessing logs and activity records;
- Configuring system settings, activating/deactivating platform modules;
- Exporting data and performing backups.

5. User Interface and Navigation

The SHEERenov+ platform is designed with a strong focus on intuitive navigation, visual clarity, and accessibility for various types of users. Its structure ensures smooth orientation for both non-technical homeowners and professionals looking for specific tools or information.

5.1. Main Navigation Structure

The main navigation menu is located at the top of every page and includes the following sections:

- **Начало (Home)** – The landing page of the platform offering a visual overview of key topics such as what OSS centers are, benefits of renovation, financing programs, recent updates, and a preview of other modules;
- **Вижете процеса (Customer Journey)** – An interactive guide outlining the key steps in the residential renovation process, with descriptions, document links, and OSS involvement at each stage;
- **Финансиране (Financing)** – Up-to-date information about available funding programs, eligibility criteria, and relevant application processes;
- **Актуално (News)** – A section featuring recent news, project updates, and announcements related to the SHEERenov+ initiative;
- **Библиотека (Library)** – A structured document repository including legislation, templates, and technical guidelines related to energy renovation;
- **Добри практики (Best Practices)** – A collection of real-world case studies from completed renovation projects, organized by category;
- **Калкулатор (Calculator)** – A user-friendly tool for assessing potential energy savings, investment needs, and payback time;
- **Центрове (Centers)** – An interactive list and map of existing OSS (Центрове за комплексно обслужване), with links to their individual pages and contact forms;
- **Стани партньор (Become a Partner)** – A dynamic registration form for organizations wishing to join the partner network, including guidance and eligibility criteria;
- **Контакт (Contact)** – A general contact form for user inquiries, suggestions, or support requests.

Each of these menu items is designed for intuitive navigation and quick access to the platform's primary features and services.

5.2. User Profile Functions

After logging into the platform, users gain access to a personalized profile, which includes:

- Editing personal or organizational information;
- Changing the password;
- Viewing and downloading saved calculator results;
- Maintaining a partner profile (if applicable);
- Access to administrative or internal modules depending on user role.

5.3. Visual Elements and Icons

- The platform makes use of clear visual elements to aid navigation:
- **Tiles and icons** on the homepage, representing the main topics;
- **Interactive features** within the calculator and building map;
- **Consistent color coding** to distinguish different content areas and functionalities.

5.4. Highlighted Key Modules

- The **calculator** is user-friendly and designed for homeowners with no technical background. It offers visual results that can be saved with registration.
- The **Customer Journey** module is an educational tool that builds trust by clearly explaining each stage of the renovation process.
- The **Documents and Best Practices** section offers both practical templates and inspirational case studies from real renovation projects.
- The **interactive map** allows users to visually explore building coverage and understand the scale of the initiative.

6. User Registration and Identification

Access to the advanced functionalities of the SHEERenov+ platform requires the creation of a personal or organizational profile. The registration process is simple and secure, enabling personalized use of the platform and assigning appropriate access levels based on user role.

6.1. Creating an Account

Users can begin registration by clicking the **“Login”** button in the top right corner of the website and selecting the **“Register”** option. The form requires the following information:

- Full name (or organization name);
- Email address;
- Password creation;
- Confirmation of acceptance of the Terms of Use and Privacy Policy.

After submitting the form, the user receives an email with a link to confirm the registration. Until the account is activated, the registration remains inactive.

6.2. Access Levels

The platform uses a role-based access control system, with four main categories of users:

- **Regular user** – registered citizens with access to save calculator results, submit requests, and view personalized content;
- **Partner** – organizations that have applied and been approved to join the OSS partner network;
- **OSS Operator** – experts with access to the internal module, responsible for coordination and documentation of renovation processes;

- **Administrator** – full access to platform content and system management.

6.3. Profile Management

Each user can manage their profile via the personal menu in the top right corner, including:

- Editing contact details and password;
- Requesting a role change (if applicable);
- Requesting profile deactivation (via the contact form).

Higher access levels (Partner, Operator, Administrator) require **approval by a platform administrator or the respective OSS center**, ensuring secure and controlled access to sensitive information.

7. Partner Registration

7.1 Criteria and Requirements

To be included in the platform, partners (legal entities or individuals providing services, supplies, or construction works related to energy-efficient renovation) must meet certain minimum criteria and provide basic information through an application form. The key requirements include:

- Company/personal data, including activity profile, experience, and key experts;
- Preferred region of operation and selected professional fields;
- At least three verifiable references from the past 3–5 years;
- Documents proving qualifications, licenses, insurance, etc.;
- Acceptance of the privacy policy and the terms and conditions for participating in the OSS partner network.

Depending on the type of activity declared, specific supporting documents and qualifications may be required, in line with national regulations.

7.2 Registration Steps

The partner registration process includes the following steps:

1. **Access the form** – applicants navigate to the “Become a Partner” section on the platform.
2. **Complete the application form**, including uploading the required documents.
3. **Select territory and type of services** to be offered.
4. **Submit the application** after reviewing the data and accepting the conditions.
5. **Email confirmation** that the application has been received and will be reviewed.
6. **Review by the platform administrator or OSS team**, with a request for additional information if necessary.
7. **Approval and inclusion in the database**, with an initial rating based on the submitted documentation and references.

7.3 After Approval

Once approved:

- The partner profile becomes publicly visible on the platform with basic information and external links;
- The complete partner file is accessible to the respective OSS teams;
- The partner can update or supplement their information through their profile;
- An annual review and update of their rating is conducted, based on feedback from OSS teams and users;
- Promotional visibility on the website can be requested;
- In cases of outdated information or consistent negative feedback, the partner may be downgraded or removed from the database.

7.4 Editing the Partner Profile

After registration, partners gain access to a personalized dashboard where they can:

- Update contact details and service offerings;
- Upload new documents and certificates;
- Add new references;
- Register for OSS trainings or events;
- Monitor their partner rating and user feedback.

All edits are subject to review by the administrator or the relevant OSS team, who receive automatic notifications for each change.

8. Public OSS Page

Each One-Stop Shop (OSS) registered on the SHEERenov+ platform has its own dedicated public page, allowing it to present its work and team to potential clients and partners. The page is maintained by the OSS team itself and is designed to increase visibility and build trust in the services offered.

What the public page includes

- **General presentation of the OSS** – mission, focus, and key services;
- **Team members** – short descriptions of key staff;
- **Contact form** – allows citizens and partners to get in touch directly;
- **News and events** – to share participation, initiatives, and results;
- **Useful links** – to related projects, documents, and resources;
- **Gallery** – upload of “before/after” photos of completed projects;
- **Client testimonials** – a section for collecting and displaying feedback.

How the page is maintained

The OSS team edits the content via the administrative interface. The platform allows easy uploading of text, images, and documents, and changes may be subject to review by the central administrator, if needed.

9. Internal OSS Module

The internal OSS module is intended for operational use by OSS teams and offers a full set of functionalities for managing renovation-related projects. This module is not accessible to external users and contains sensitive information that requires strict protection and traceability.

Creation and maintenance of project files

For each serviced building, a digital file is created, containing:

- Basic information (address, type, residents, current condition);
- Documentation from visits, meetings, audits, and HOA decisions;
- Consultation reports, renovation plans, contracts, and more.

Protocols and templates

The module enables automatic generation and storage of standard documents, including:

- Meeting protocols;
- Notifications and letter templates;
- Technical and financial assessment forms.

Database – photos, geolocation, status

Each building can be documented with:

- “Before/after” images;
- Georeferenced coordinates;
- Progress indicators for the renovation process.

Search and filtering

The interface includes a robust search and filtering system based on criteria such as:

- Project status;
- Region or address;
- Responsible expert;
- Types of completed activities.

Access to the partner registry

OSS teams have internal access to the verified partner registry and can:

- Search for qualified service providers by field and region;
- Review documents and references;

- Send inquiries or initiate collaboration.

10. Platform Administrative Module

The administrative module is accessible only to authorized users with administrator rights (initially, the EnEffect team) and provides full control over the management and maintenance of the platform. This module allows for both content management and user access control, moderation, and activity monitoring.

10.1 Main Administrator Functions

Administrators have access to the following functionalities:

- **User management** – create, edit, activate, and deactivate profiles;
- **Registration approval** – of partners, OSS centers, and operators;
- **Content control** – editing of all public pages, publications, sections, and resources;
- **Module settings** – enabling/disabling functionalities, filters, and additional options;
- **Activity monitoring** – viewing logs, actions, and statistics;
- **System notifications** – publishing notices during maintenance or platform updates.

10.2 Navigation in the Administrative Interface

The administrative panel is structured in a sidebar menu with five main categories:

1. **Content** – management of pages, news, documents, the library, best practices, FAQs, and other resources;
2. **Centers** – editing OSS information, managing feedback and training events;
3. **User-generated content** – forums, messages, contact forms;
4. **Content settings** – categories for documents, programs, library items, etc.;
5. **Administrative** – management of users, roles, permissions, and system settings.

Each section opens a list of existing entries, which can be:

- **Viewed** – by clicking the entry or the “eye” icon;
- **Edited** – via a button or direct form access;
- **Deleted or marked for actions** – using checkboxes and an action menu.

10.3 Working with Resource Entries

When managing resources (e.g., news, documents, programs), a table of all entries is displayed at the top of the section. Main capabilities include:

- **View/Edit** – to display and modify resource content;
- **Bulk actions** – selecting multiple records via checkboxes and applying actions (e.g., delete);
- **Context menu** – hovering over entries reveals icons with additional options.

10.4 Search and Filtering

The platform supports two types of search:

- **Global search** – the search bar at the top performs a simultaneous query across all resources;
- **Local search** – keyword-based search within a specific section (e.g., News only);
- **Filters** – located on the right, allowing advanced segmentation by category, date, or document type.

11. Technical Support and Maintenance

The stable operation and long-term sustainability of the SHEERenov+ platform rely on continuous monitoring, regular updates, and active technical support. This chapter outlines the procedures and tools used to ensure the reliability, security, and up-to-date status of the system.

11.1 System Monitoring and Diagnostics

The platform includes a basic logging and monitoring system to help administrators track key events and system changes. Supported functionalities include:

- Logging of administrative actions such as creating or editing content, approving or deactivating users;
- Tracking user registration activity (account creation, logins);
- Displaying actions within an admin-accessible monitoring panel;
- Basic statistics on published resources, active users, and pending registrations.

11.2 Maintenance and Updates

Scheduled maintenance activities are carried out to:

- Apply security patches and updates;
- Introduce new features or improve existing ones;
- Optimize and clean up the database;
- Archive system data and settings.

During maintenance, users see a temporary system unavailability message. Whenever possible, these activities are scheduled outside of peak usage hours and announced in advance.

11.3 Data Backup and Export

The platform offers limited capabilities for manual export of content in standard formats. Available features include:

- Export of selected user data (e.g. registered partners) in Excel format;
- Download of uploaded documents and resources via the admin panel;

- Periodic local database backup, performed by the technical support team;
- Structured storage of uploaded files by module and resource type for easy access.

11.4 Technical Support and User Feedback

The technical support team—coordinated during the initial phase by EnEffect and the platform’s developer—is responsible for:

- Responding to user inquiries via the contact form or administrator email;
- Assisting with login recovery and bug resolution;
- Collecting and prioritizing suggestions for new features or improvements;
- Maintaining up-to-date documentation, including FAQs and user guides. The platform includes built-in feedback mechanisms to support continuous improvement based on real user experience.

12. Conclusion

The SHEERenov+ web platform has been developed as a comprehensive digital tool to support the energy renovation of residential buildings through the model of One-Stop Shops (OSS). With its flexible architecture, multiple modules, and personalization features, the platform meets the needs of a wide range of users – from citizens and professionals to administrators and technical teams.

This user guide aims to facilitate navigation through the platform and support its effective use. The structured presentation of access, functionalities, and administrative capabilities contributes to the high quality of services and the sustainable development of the digital infrastructure supporting the renovation of the building stock in Bulgaria.

The platform is designed for future expansion, and the accumulated practical experience and user feedback will play a key role in its continuous improvement as a strategic tool in support of the evolving national OSS system.