



HEINNOVATE FOR RIS3

RE-ACT Web Platform

D1.3.3. Online platform and users' guide

This self-assessment tool was developed in the frame of the [RE-ACT](#) project.

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1.0 REGISTER AND SIGN IN

1.1 Register

To register, go to <https://sunar.pbs.up.pt/> and fill in the following fields:

- Name *
- Surname *
- Country *
- Field of Work (Options: Higher Education Institution, Public Sector, Private Sector, Civil Society) *
- Organisation
- Department / Faculty
- Email *
- Password *
- Confirm Password *

Notes:

- ❖ Fields with * are mandatory.
- ❖ The “Password” and “Confirm Password” fields must be equal

After the correct submission of the registration form, a confirmation email is sent to the e-mail address.

To validate, and access the user area, you must access your email and validate the registration by clicking on the link that accompanies the welcome email.

1.2 Sign In

To sign in, go to <https://sunar.pbs.up.pt/signin> and fill in the following fields:

- Email
- Password

Click on the *Sign In* button, and if the data is correct, you will be directed to your *Private Area* page.

Notes:

- ❖ You need to validate your email account before making your first login. Checkpoint 1.1.

1.3 Recover Password

To recover your password, go to <https://sunar.pbs.up.pt/forgotpassword> and enter your e-mail address.

Click the *E-Mail - New Password* button and new access info will be sent to your registration email.

To log in, you should check your e-mail account and repeat point 1.2

2.0 SELF-ASSESSMENTS

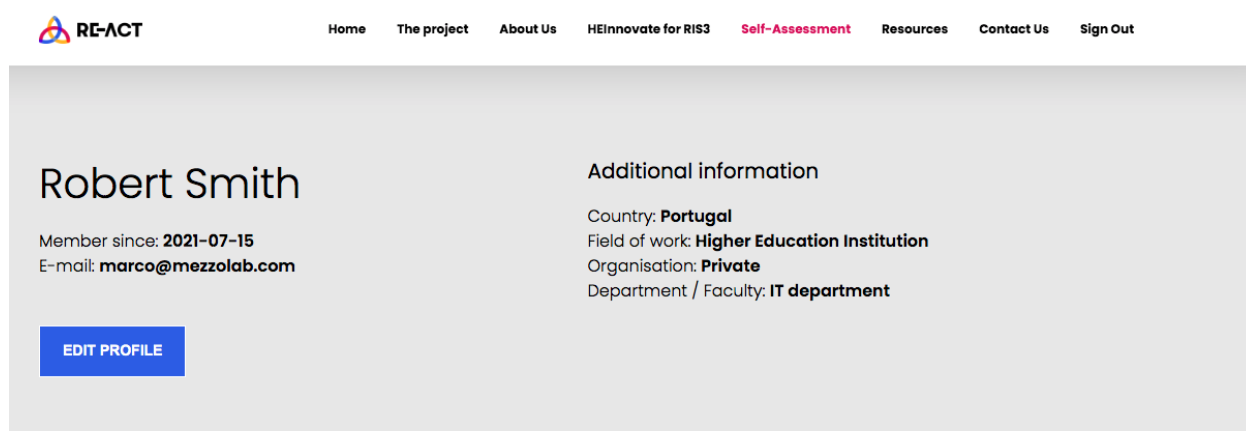
2.1 Dashboard

After logging in, you can access the link <https://sunar.pbs.up.pt/self-assessment> and view all the self-assessments already completed, or the groups already created.

The dashboard consists of 3 different areas: *user information*, *listing of self-assessments* and *listing of self-assessment groups*.

2.1.1 Personal information

The first block of the dashboard displays personal information, which can be changed by clicking on the *Edit Profile* button.



The screenshot shows the RE-ACT dashboard. At the top, there is a navigation menu with links: Home, The project, About Us, HEInnovate for RIS3, Self-Assessment (highlighted in red), Resources, Contact Us, and Sign Out. The main content area displays the user profile for Robert Smith. On the left, it shows the name 'Robert Smith', 'Member since: 2021-07-15', and 'E-mail: marco@mezzolab.com'. Below this is a blue button labeled 'EDIT PROFILE'. On the right, under the heading 'Additional information', the following details are listed: Country: Portugal, Field of work: Higher Education Institution, Organisation: Private, and Department / Faculty: IT department.

2.1.1.1 Edit personal information

To change your data, simply edit the information in the *Change personal data form*, and then click the *Save* button.

To change the password, the user must fill out the *Change Password* form and click the *Save* button. The *Password* and *Confirm Password* fields must be filled in with the same password.



2.1.2 List of Self-assessments

In the second block of the Dashboard, the user can view the list of self-assessments he/she has already completed, or that other users may have answered in self-assessment groups created by the user.

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My self-assessments

HEInnovate is designed to help higher education institutions assess themselves against statements which are organised under eight areas.

[START NEW SELF-ASSESSMENT](#)

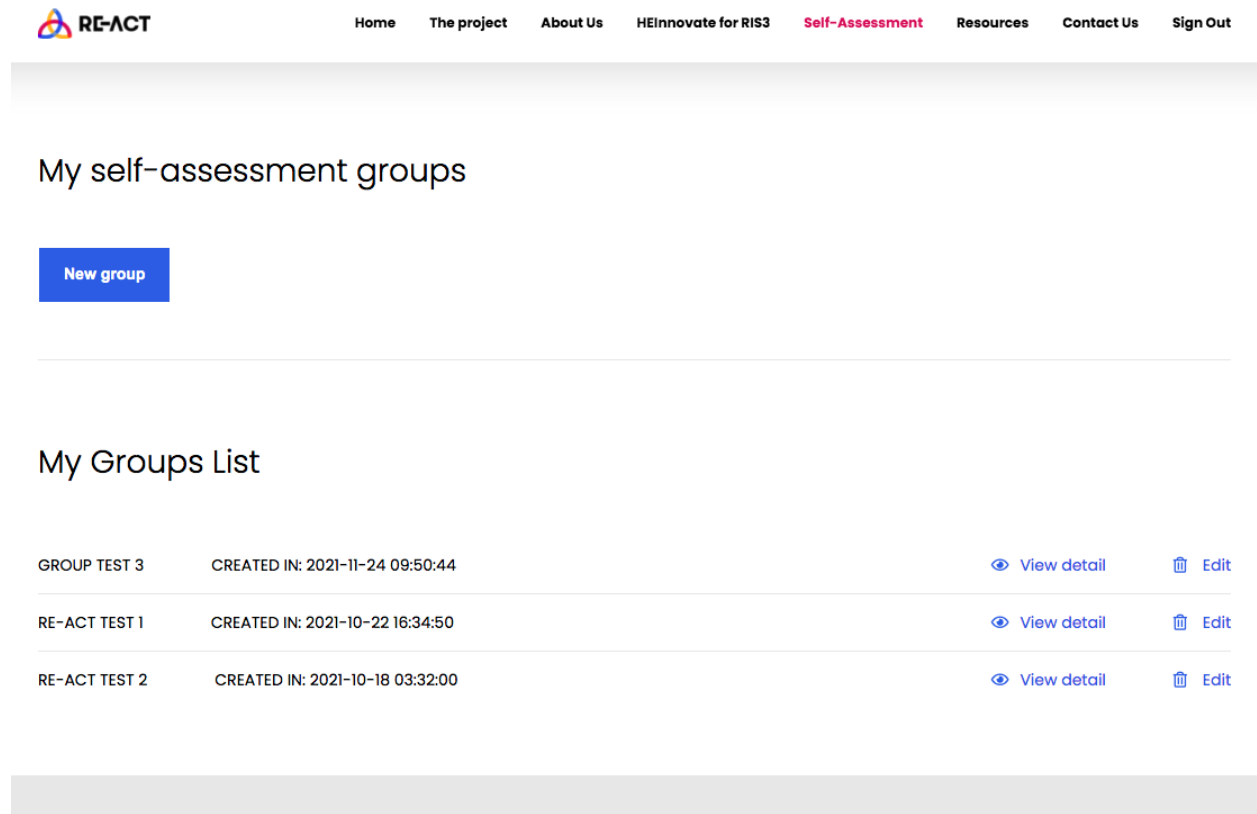
My self-assessments list

Group Test 3			
STATUS: COMPLETED	FILLED BY: PEDRO FERREIRA SUBMITTED AT: 2021-11-24 10:17:31		View result
STATUS: COMPLETED	SUBMITTED AT: 2021-11-24 10:00:56	View result	Delete
STATUS: COMPLETED	SUBMITTED AT: 2021-11-24 09:51:38	View result	Delete

Only self-assessments created by the user can be deleted; those created by third parties to user groups can only be viewed.

2.1.3 Group self-assessments

In the third block of the dashboard, the user can view the list of group self-assessments that the user has created.



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My self-assessment groups

New group

My Groups List

GROUP TEST 3	CREATED IN: 2021-11-24 09:50:44	View detail	Edit
RE-ACT TEST 1	CREATED IN: 2021-10-22 16:34:50	View detail	Edit
RE-ACT TEST 2	CREATED IN: 2021-10-18 03:32:00	View detail	Edit

2.2 Self-assessment

2.2.1 Create new self-assessment

To create a new self-assessment, you need to access your user area at <https://sunar.pbs.up.pt/self-assessment> and click on the button: *Start New Self-Assessment*.

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Robert Smith

Get started

Here you can read about the dimensions of HEInnovate and download the Concept note, which provides a background on HEInnovate and the concept of entrepreneurial universities.

To start a self-assessment, select one of the dimensions from the diagram. By clicking on the diagram you will be taken to the selected dimension of HEInnovate. Under each of the eight dimensions, statements have been designed so that you can rate them on a scale of 1 to 5. On the scale 1 represents the lowest and 5 the highest score. A 'not applicable' (n/a) option is also available. Please use the slider under the statements to score.

Expand the dimensions below to read more

- Leadership and Governance
- Organisational Capacity: Funding, People and Incentives
- Entrepreneurial Teaching and Learning
- Preparing and Supporting Entrepreneurs
- Digital Transformation and Capability
- Knowledge Exchange and Collaboration
- The Internationalised Institution
- Measuring Impact

Select one of the dimensions below to start a self-assessment

Leadership and Governance	Organisational Capacity: Funding, People and Incentives	Entrepreneurial Teaching and Learning	Preparing and Supporting Entrepreneurs
Digital Transformation and Capability	Knowledge Exchange and Collaboration	The Internationalised Institution	Measuring Impact

To start the self-assessment just click on one of the dimensions and you will be led to a new page with the statements associated with that dimension.

For each statement, you should choose one of the options on the Likert scale from 1 to 5, or N/A, according to the level of agreement with each statement. In fact, 1 means that the statement is little applicable and 5 means that the statement is highly applicable in the user's organisation. To provide support to the attribution of a score in this self-assessment process, each statement is further explained through additional information.



To go to a new dimension, you should click the *Save and Go to Next Area* button or click the button representing the required dimension.



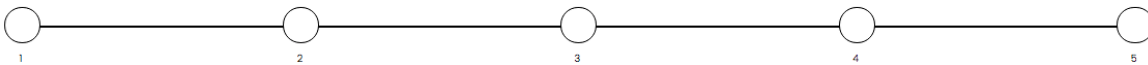
Entrepreneurial Teaching and Learning

The availability of skilled human resources appropriate to the regional economic structure and research and development specialisation is of key importance. The match between the supply of education at all levels and regional human resource needs is one of the important aspects covered by the early smart specialisation concept. HEIs have an important role to play in developing specialised human resources, as well as in supporting the development of more transversal skills necessary for smart specialisation. In fact, HEIs have a twofold role in order to promote the regional human capital: provide horizontal competences, and answer to specific needs through specialised programs. The latter can be co-created with local partners. This dimension concerns the educational role HEIs can play in order to provide human capital in line with market needs, as well as in supporting students in developing skills and in acquiring competencies related to smart specialisation. In addition it covers other types of educational programmes that an HEI could provide, particularly for employees of companies, in order to stimulate the development of entrepreneurial and innovative mindsets and capacities.

1 :: The HEI graduate programmes provide knowledge and skills related to RIS3.



N/A

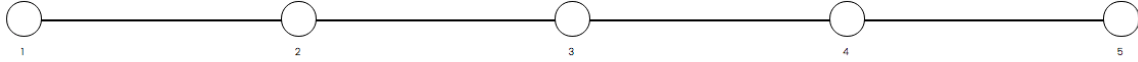


HEIs can also contribute to RIS3 in the context of their primary mission, as providers of specialised future workforce. Ideally, the higher educational offer – at all levels of education, i.e. BA, MA, PhD – should support to some extent structural transformation in smart specialisation priority areas, through the provision of skilled human resources.

To score high, an HEI could, for example:

- Periodically update its curricula in order to match market needs and specifically the needs related to smart specialisation priority areas
- Be open to incorporate into its higher educational offer programmes that provide students with knowledge and skills necessary for future economic, social and technological challenges
- Integrate the results of entrepreneurial research into its educational offer
- Cooperate with businesses to map and gather information on their human resource needs

2 :: The HEI delivers training programmes to support the upskilling and reskilling of staff in the smart specialisation priority areas.



Besides graduate programmes, HEIs can develop and deliver training programmes that support the continuous learning of employees of businesses, with an emphasis on employees from the priority areas of smart specialisation. It can also offer training courses that contribute to general capacity building of employees from the regional innovation system in innovation-related matters.

To score high, an HEI could, for example:

- Create and deliver training or educational programmes for employees of companies for their further development as part of an adult learning or continuous education offer
- Develop and offer on-demand training programmes tailored to the needs of companies in order to teach employees how to efficiently use and exploit new technologies
- Offer training programmes that develop research and innovation related knowledge and skills of employees, developing the capacity of actors from the quadruple helix and contributing to the interconnection of the regional innovation system

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SUBMIT THIS SELF-ASSESSMENT

SAVE AND GO TO NEXT AREA

After filling in all the dimensions, you should click on the *Submit this Self-Assessment* button to submit your answers and get the final report.

When you click on the submit button, a new summary page of the answers provided is presented, which must be confirmed for the submission to take place.

If you want to change your answers, just click the *Cancel* button and the system will return to the previous page.

If you want to confirm the submission, click the *Confirm Self-Assessment* button and you will be sent to the final report page.




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5 The HEI analyses the current and future needs of society and business, providing the knowledge to respond to the challenges 5

 The Internationalised Institution

1 The HEI participates as a partner in European and international R&I projects. 5

2 The HEI links the region to external knowledge sources. 5

3 The HEI is engaged in European and international R&I networks. 5

 Measuring Impact

1 The HEI is actively involved in participatory RIS3 monitoring, evaluation and learning activities 5

2 The HEI measures its own contribution to reaching RIS3 objectives. 5

2.2.2 View new self-assessment

To view a self-assessment you need to go to your User Area at <https://sunar.pbs.up.pt/self-assessment> and choose the Self-assessment from the displayed listings.

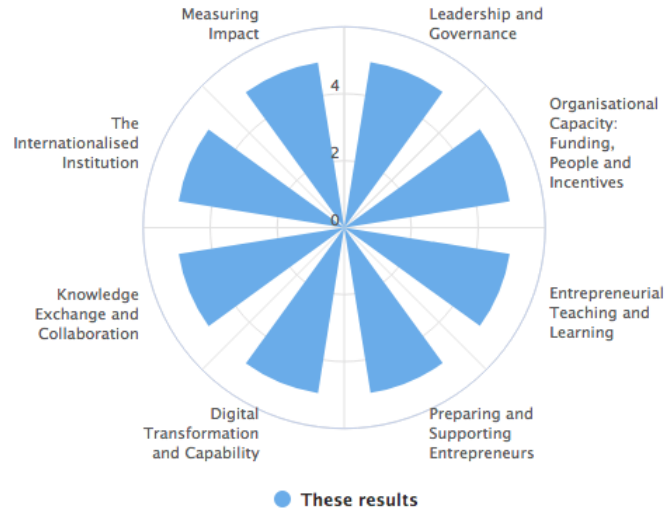
Then you should click on the *View Result* link, which is on the line you want.

STATUS: COMPLETED	SUBMITTED AT: 2021-11-29 15:17:38	View result	Delete
STATUS: COMPLETED	SUBMITTED AT: 2021-09-23 09:35:31	View result	Delete
STATUS: COMPLETED	SUBMITTED AT: 2021-09-15 18:59:49	View result	Delete
STATUS: COMPLETED	SUBMITTED AT: 2021-07-20 15:47:00	View result	Delete

When you open the *Self-assessment detail page* you will see a summary of the answers given and comparison charts - three tabs are shown with information.

Overview

This tab shows a graph with the answers given.

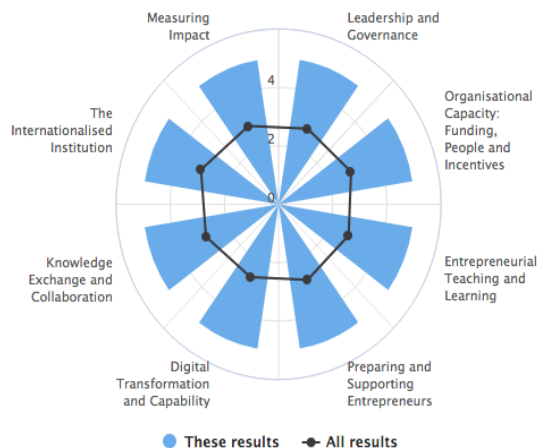


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Comparison

This tab shows a comparative graph with the answers given by the user and the average of the answers given by other users.



Detailed Results

This tab shows the list of dimensions and questions with the answers given.

	Leadership and Governance	5
1	The HEI is represented through its senior management in the highest governing body of RIS3 on a regional level.	5
2	The HEI is strategically committed to implement its third mission taking into account RIS3 objectives.	5
3	Senior management of the HEI ensures that processes, procedures and internal communication measures facilitate the HEI's participation in key steps of RIS3 design and implementation.	5
4	The HEI is able to reach out to and attract key innovators from the faculties into the entrepreneurial discovery process and RIS3 implementation.	5
5	Every HEI employee involved in RIS3 has equal access to all information; the principles of transparency and participation are consistently applied.	5
	Organisational Capacity: Funding, People and Incentives	5
1	The HEI maintains a structured, up-to-date registry of its internal knowledge assets.	5



On this page, you can also export this information to a PDF file. For that, you need to click on the *Download Report as PDF* button.

It is also possible to share the information via email, by clicking the *Send Report to an Email* button.

2.3 Group self-assessment

The creation of a group allows the user to gather and compare the answers of a restricted group of people, obtaining as a result the averages of the answers of that group and not of the generality of the answers in the platform.

2.3.1 Create new group

To create a new group, go to <https://sunar.pbs.up.pt/self-assessment> and in the information block *My self-assessment groups* you should click on the *New group* button.

A new page will be displayed with the form to create the group where you should fill in the following fields:

- Group - URL Code – Code that identifies the group and will be included in the link to be shared with other users.
The code should be created by you, for example, TEST GROUP, and then it will be automatically included in the link. E.g.: <https://sunar.pbs.up.pt/group-assessment/71/testgroup>.
- Group Title – Group presentation title
You should write a title that describes this group. It will be useful once you have several groups to identify the one you want to access.
- Description – Descriptive text explaining the group.
You should add a little description in order to help your guests to understand what the exercise is about.
- Allow Anonymous – Field to define if the group self-assessments can be filled in anonymously or not.
If you choose *Yes* - users can fill in the self-assessments without registering, if you choose *No* - users will need to register on the platform to be able to fill in the self-assessment.

After creating the new group, you can make the link available to users so they can access it and fill it in.

2.3.2 Share group

After creating a group, you can provide the link to one or more users.

To do this, access the group's detail at <https://sunar.pbs.up.pt/self-assessment> and click on the link *View detail* that is in the row of the desired group.

My Groups List

GROUP TEST 3	CREATED IN: 2021-11-24 09:50:44	View detail	Edit
RE-ACT TEST 1	CREATED IN: 2021-10-22 16:34:50	View detail	Edit
RE-ACT TEST 2	CREATED IN: 2021-10-18 03:32:00	View detail	Edit

By accessing the detail of the group, the information shown below is displayed.

There is a button through which you can send the URL of your group per e-mail:

- If the group allows anonymous filling - whoever accesses the link will automatically enter the filling functionality.
- If the group does not allow anonymity - the user will be forwarded to the registration page and, only after registration and login, is able to access the link to fill in the form.

Group Test 3

Created In: 2021-11-24

Number of Self-Assessment: 2

Group URL Code: groupstest3

Group Title: Group Test 3

URL to Share: <https://react.pbs.up.pt/group-assessment/1/groupstest3>

Allow Anonymous: No

Description: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

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2.3.3 Report

As users fill out the self-assessments, the user who created the group will be able to follow its progress on the group's detail page.

In addition to the basic information of the group, there will be 2 more blocks of associated information:

My group self-assessments list

Listing of completed self-assessments where the status, submission date, and the name of the person who filled it out (if not anonymous) appears.

Report

In this block, the dimensions are presented with the respective questions and the average of the answers given by the users of the group.

For each question, a table is also presented with the answers from 1 to 5, or N/A, in which appears the total number of answers given in each score at that moment.