**Annex 2 to fill in**

**for**

**Call for tenders**

**in**

**GreenDependent Institute Nonprofit Ltd’s**

# **“European Network for Research, Good Practice and Innovation for Sustainable Energy”**

# **ENERGISE project**

**(Grant Agreement No: H2020/727642)**

**TO DESIGN AND DEVELOP**

**AN ONLINE MONITORING PLATFORM**

**Procurement process**

**15th February 2018**

Validated by:

Kristóf Vadovics

Executive Director

GreenDependent Institute Nonprofit Ltd.

**Annex 2**

**ENERGISE Online Monitoring Platform technical requirements**

Priority levels set by Contracting Entity:

1. Mandatory; 2. Strongly suggested; 3. Optional but recommended

Numbers for insertion by Applicant (one number per row only):

 **[Blank] Cannot be actualized**

**1 Built-in**

**2 Tailored / customized**

**3 Other, see comments**

Instructions: The Applicant fills in the appropriate number next to each item. Anything else in this document must not be altered. Any blank items with priority “1” will lead to rejection of the Applicant. All comments must be provided on a separate page, indicating the item number on which the Applicant wishes to comment. All items regardless of the number inserted by the Applicant can be commented on if the Applicant wishes to do so. Items can also be referred to in the Applicant’s work and communication plan. Any comment on priority “1” item that suggests weakening of the stated requirement will lead to rejection of the Applicant. Except for blanks, the evaluation of a tender will not be based on the responses filled in by the Applicant. However, assigned numbers will be used when evaluating the Applicant’s ability to fulfill its proposed work and communication plan.

The filled in *ENERGISE Online Monitoring Tool technical requirements* document is to be provided as a part of the tender documentation.

## General

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| **No.** | **Feature description** | **Priority** | **Applicant’s response** |
| 1 | The system can handle 400 simultaneous users browsing and filling in forms. | 1 |  |
| 2 | The system provides security features protecting the inserted data and providing password-protected user accounts to all users. | 1 |  |
| 3 | The system allows logging in with Gmail or facebook user account data. | 3 |  |
| 4 | The system makes use of a single database that is accessible in eight different countries in eight different languages. |  |  |
| 5 | Four different user privilege levels, each with their own web page and control interface. All levels are easy to use. They are intended to be following:(1) Admin level (app. 5 users): Admins can add and modify forms (for survey questionnaires). They also have access to all the data in anonymised form (without identification of households). At least 5 admins are to be designated.(2) ENERGISE project partner level (app. 40 users): project partners can create and modify forms, add data (e.g. observations, interviews), enter free text (where this is facilitated), can access all data of their own country (not anonymised) and all data of other countries (anonymised).(3) Local support level (app. 30 users): Implementing partners can input data (e.g. observations, interviews) and can access data of their own country (not anonymised).(4) Household level (app. 320 users): households can input data, access their own data and (graphic) summaries of their own data. | 1 |  |
| 6 | Each user (household) can be flagged with predefined and freely chosen attributes, e.g. Activity status (1. active, 2. resigned) | 1 |  |
| 7 | Easy-to-use instruction manual for all user levels | 1 |  |
| 8 | Search function | 1 |  |
| 9 | The system automatically transfers the user to the right language interface by location or web site address. |  |  |
| 10 | The system collects and provides statistics that include loaded but unfilled forms, time spent filling in forms and all other usage. | 1 |  |
| 11 | The system logs user actions, e.g. when a form or a page is created/modified or the database is accessed, exported or modified. | 1 |  |
| 12 | The system fully supports special characters that can be added by the site / form creators and users filling in forms. The text entered into forms is stored keeping the characters correct. | 1 |  |
| 13 | The system is able to send e-mail and text messages with automation and custom-timing features. | 1 |  |
| 14 | The web address is simple. | 1 |  |
| 15 | The system is based on readily available platform. | 2 |  |

## Information collecting

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| **No.** | **Feature description** | **Priority** | **Applicant’s response** |
| 16 | Easy-to-use form creating tool that supports free-text fields, selectable items and semi-free fields (e.g. user-inserted temperature allowing range 15-30°C). | 1 |  |
| 17 | Size of the form items is customizable (e.g. size of a free field). | 1 |  |
| 18 | User instructions for filling in forms can be inserted on any part of the form. | 1 |  |
| 19 | The collected data is organized in a database that provides structured access. | 1 |  |
| 20 | The form provides saving feature to allow the user to continue filling in the form at a later date/time. | 2 |  |
| 21 | Once a filled-in form is submitted, only ENERGISE partner level users can change the data. | 2 |  |
| 22 | Form creators can set forms to be automatically published on specified date and time. | 1 |  |
| 23 | Form templates can be saved. | 1 |  |
| 24 | A personal link or invitation to the form can be sent to e-mail addresses and mobile phones with accompanying, explanatory text. The system tracks which households have responded and sends automatic reminders to those who have not. |  |  |
| 25 | The system supports browser-based and mobile (app or mobile-compliant web UI) responses and can link received data to correct household. | 1 |  |
| 26 | The system supports the following ways to insert data:(1) Pre-entered data, fed in by ENERGISE partners (directly and uploading from xls-files). (2) Data to be entered by participating households. These are collected via automated form-based surveys via the online monitoring platform.(3) Data to be entered by ENERGISE partners and local implementing partners. These data include interview and survey questionnaire responses, which are entered directly during or after the interviews with households. The interviews and surveys are rendered in English, French, German, Hungarian, Dutch, Danish, Irish and Finnish and need to be attributable to specific households.(4) Data from logging devices can be uploaded in csv or xls-format and attributed to specific households. | 1 |  |
| 27 | The form creation and management tool is based on readily available software. | 3 |  |
| 28 | Data from household interviews (conducted by ENERGISE partners) can be inserted/uploaded as free text and connected properly to the household that provided the data. | 1 |  |
| 29 | Questionnaire forms support eight languages so that there is no need to create all of them separately. ENERGISE partners can translate the original English form into their own national language. | 1 |  |
| 30 | Data collected via paper-based surveys can be manually inserted into the system and connected to the specific household that provided the data. | 1 |  |

## The mobile system and user interface

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| **No.** | **Feature description** | **Priority** | **Applicant’s response** |
| 31 | The system provides a web interface for all user levels, all of the web pages being different depending on user privilege. | 1 |  |
| 32 | The web interface provides customizable web pages (e.g. welcome and instruction page) but the forms and other pages require login with password to be accessed. | 1 |  |
| 33 | Forms and web pages are designed to be visually elegant according to the ENERGISE project identity guide (to be made available by ENERGISE partners) and retain their formatting and functionality on all of the most common mobile/stationary devices and browsers. | 1 |  |
| 34 | Easy-to-use web site editor. | 1 |  |
| 35 | Customizable web site structure. | 1 |  |
| 36 | The interface provides eight language versions. The system automatically transfers the user to the right language interface by location or web site address. | 1 |  |
| 37 | The web pages can be updated and modified even after roll-out of the system. | 1 |  |
| 38 | The system provides a mobile interface that is easy to use and has a fast response time. | 1 |  |
| 39 | The mobile system scales items automatically to fit the screens of mobile devices. No horizontal scrolling is allowed. | 1 |  |
| 40 | The mobile system works on Android, iPhone and Windows Phone–platforms. | 1 |  |
| 41 | The login information can be saved so that users do not need to enter password every time they log in. | 2 |  |
| 42 | The primary way to actualize the mobile interface is a mobile-compliant web page instead of a dedicated app. | 3 |  |
| 43 | Should the mobile system be built as a phone app, the contractor is responsible for the qualification process to Apple, Google and Windows mobile store. | 2 |  |
| 44 | The mobile system shows the same forms as the web interface. If no separate mobile version of a form or web page is created, the system automatically scales the form / page to fit the screen properly. | 1 |  |
| 45 | The user interface (both mobile and web) allows viewing previously sent forms and personal summary/progress reports.  | 1 |  |
| 46 | The household web page includes graphic feedback on household progress. The graphic feedback is automatically calculated based on household responses provided in forms and pre-entered formulas (*see section “Information processing”)*. | 1 |  |

## Integrations

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| **No.** | **Feature description** | **Priority** | **Applicant’s response** |
| 47 | The system has e-mail and text message sending capability. | 1 |  |
| 48 | The logger data can be uploaded as csv or xls-files and properly stored in the database, clearly linked to the household where it was attained.  | 1 |  |
| 49 | All data is exportable to Microsoft Excel. The data to be exported can be searched/filtered and selected (e.g. all logged temperature data in DK or all survey data from FI and HU). | 1 |  |
| 50 | User contact information can be managed in Excel by exporting and importing correct file. | 1 |  |

## Information processing

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| **No.** | **Feature description** | **Priority** | **Applicant’s response** |
| 51 | The platform includes pre-entered data and calculation formulae (provided by the ENERGISE partners) for producing data and graphs of (changes in) household energy and electricity use. For example, the formula to assess energy use will consist of temperature corrections based on weather data and other variables. The formulae will be household- or country-specific. | 1 |  |
| 52 | The household web page includes graphic feedback on their progress. This feedback is based on values provided by households via weekly forms (e.g. number of laundry wash cycles) and formulae (e.g. to show energy use for heating). | 1 |  |
| 53 | Calculation formulae to generate household feedback can be managed by user admins. | 1 |  |
| 54 | The system is able to collect weather data from a pre-specified reliable source (e.g. a web page). | 1 |  |
| 55 | Managing formulae can be done by user admins via upload from xls-file. The input data can be collected automatically (e.g. weather data), retrieved from the database (e.g. households’ survey answers) and uploaded from xls-files (e.g. country-specific variables). | 2 |  |
| 56 | The system provides straight integration to Microsoft Excel. Correctly structured database can be viewed and modified (e.g. add or modify calculating formulae). | 3 |  |