ENERGISE

EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY

Project acronym:	ENERGISE
Title:	European Network for Research, Good Practice and Innovation for Sustainable Energy
Grant Agreement number:	727642

DELIVERABLE 7.6

GUIDELINES FOR USING WEBSITE, ONLINE TOOLS AND PLATFORMS

Description:	Guidelines for using the ENERGISE website, online tools and other platforms developed in the project
Lead parties for deliverable:	GreenDependent Institute (GDI)
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ENERGISE PROJECT

ENERGISE is an innovative pan-European research initiative to achieve a greater scientific understanding of the social and cultural influences on energy consumption. Funded under the EU Horizon 2020 programme for three years (2016-2019), ENERGISE develops, tests and assesses options for a bottom-up transformation of energy use in households and communities across Europe. ENERGISE's primary objectives are to:

- **Develop an innovative framework** to evaluate energy initiatives, taking into account existing social practices and cultures that affect energy consumption.

- **Assess and compare the impact** of European energy consumption reduction initiatives.

- **Advance the use of Living Lab approaches** for researching and transforming energy cultures.

- **Produce new research-led insights** into the role of household routines and changes to those routines towards more sustainable energy.

- **Encourage positive interaction** between actors from society, the policy arena and industry.

- **Effectively transfer** project outputs towards the implementation of the European Energy Union.
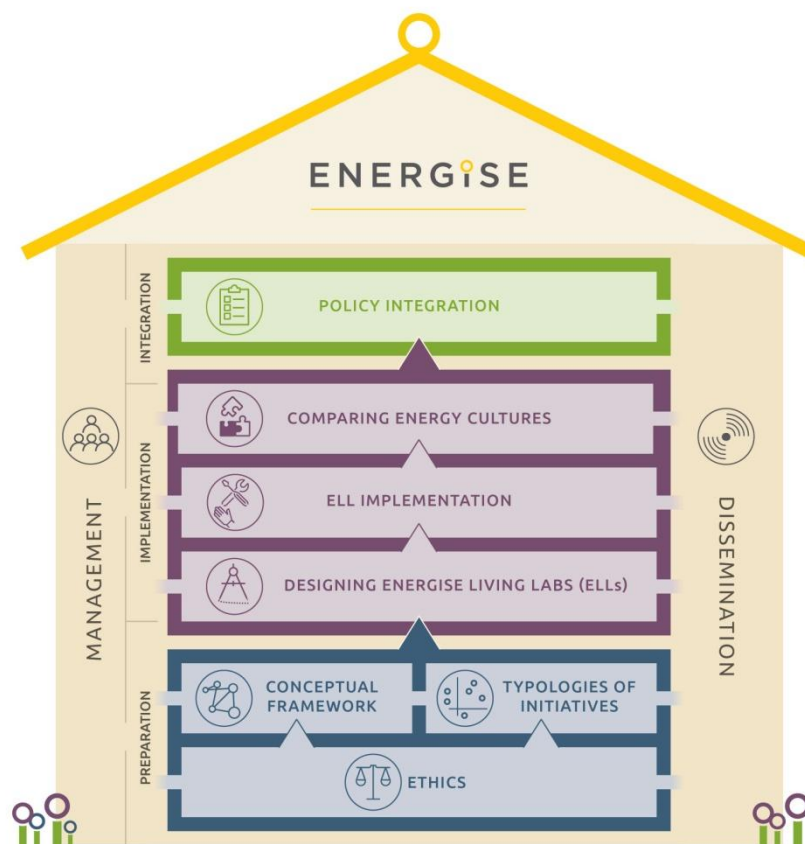
EXECUTIVE SUMMARY

This deliverable includes the guidelines for using the main online tools of the ENERGISE project.

The ENERGISE consortium uses three main online tools in the course of the project, all with a different purpose and function. These are the following:

- ENERGISE project website – www.energise-project.eu
- ENERGISE Online Database (developed in WP2 and hosted within the project website) - http://energise-project.eu/projects
- ENERGISE Sustainability Assessment Tool (SAT – developed in WP4 in 2018)

For the project website Work Package 7 leader GDI created a *'User Manual for the Energise Websites'* for the project partners and held an online training event on 27 July 2017. Both of these are included in this deliverable, with the consortium members as the primary target group.

The ENERGISE Online Database guidelines and manual was finalised in January 2018, followed by an online training session for some of the project partners (WP2 and WP7 leaders, Coordinator, etc.).

The Sustainability Assessment Tool is still being developed and implemented in WP4, it will be ready by August 2018 with the active help and contribution from WP7.

Note on the dissemination level of the deliverable:

As the target groups of the three components of this deliverable are not the same, the ENERGISE consortium will publish a slightly different version of the deliverable on its website. The published version of the deliverable will include all the information and guidelines that are needed for the successful use of the ENERGISE Online Database and ENERGISE SAT. At the same time, it will not include information only intended for partners, such as the process of translating and updating the website, etc.

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USER MANUAL FOR THE ENERGISE WEBSITES

PROJECT WEBSITES

Two types of websites have been created in the ENERGISE project, as described in detail in Deliverable 7.4. There is a central website with news and information about the entire project and its international implications in English, and there are eight national websites for national and local news and information. The latter are managed by the ENERGISE partners.

The list of the national websites is presented below:

- Bulgaria - http://bulgaria.energise-project.eu
- Denmark - http://denmark.energise-project.eu
- Finland - http://finland.energise-project.eu
- Germany - http://germany.energise-project.eu
- Hungary - http://energise.hu
- Ireland - http://ireland.energise-project.eu
- Slovenia - http://slovenia.energise-project.eu
- Switzerland - http://switzerland.energise-project.eu
- The Netherlands - http://energise-lab.nl
- United Kingdom - http://uk.energise-project.eu

MANUAL FOR THE USE OF THE NATIONAL PROJECT WEBSITES

An easy-to-use manual has been created for the ENERGISE project partners by GreenDependent (WP7 leader) on how to manage the national websites, how to inform the local stakeholders of the relevant information they need in the local languages. The national websites will become active when the implementation phase of the project starts, especially during the recruitment and the roll-out of the ENERGISE Living Labs in 2018. The full text of the guide is presented in Annex 1.

An online training session was also held to assist the project partners on the management of the national websites. The presentation slides can be seen in Annex 2.

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GUIDELINES FOR THE ONLINE DATABASE

The ENERGISE Online Database guideline and manual was finalised in January 2018. An online training session was also organized for some of the project partners (WP2 and WP7 leaders, Coordinator, etc.) in the same month and a separate user manual was written by the subcontractor for the Online Database users. The manual can be read on the ENERGISE central project website: http://energise-project.eu/node/1216.

The manual describes in detail the use of the different functions of the database tool.

GUIDELINES FOR THE SUSTAINABILITY ASSESSMENT TOOL (SAT)

Although the Sustainability Assessment Tool is still under development at the time of the submission of the present updated deliverable (implemented in WP4) and it will be functional by August 2018, the subcontractor have already prepared a draft user manual – which after finalization will be submitted as a separate deliverable of the ENERGISE project, as D4.2. The draft manual can be read in Annex 3.

ANNEX

1. **USER MANUAL FOR THE ENERGISE WEBSITES**

2. **PPT SLIDES OF THE WEBSITE TRAINING SESSION**

3. **DRAFT ENERGISE ONLINE MONITORING TOOL INSTRUCTIONS**

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Project acronym:	ENERGISE
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USER MANUAL
FOR THE ENERGISE WEBSITES

Description:	Step by step admin guide for the management of the ENERGISE national websites
Lead parties for deliverable:	GreenDependent Institute (HU)
Document type:	Manual
Publication date:	13-07-2017
Revision:	Version 5
Dissemination level:	CO Confidential, only for members of the consortium (including the Commission Services)
Authors:	Andrea Király (GDI) and Kristóf Vadovics (GDI)

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1. CENTRAL WEBSITE

The central website of the ENERGISE project is http://energise-project.eu, where all the information about the project is available in English. The website can be edited only by GDI (creating/deleting/editing menu items, news items, publishing events, etc). If you have any information or suggestion to share relating to any menus/pages or wish to add/change information, please contact GDI (kristof@greendependent.org).

2. NATIONAL WEBSITES

Each partner organisation (i.e. each country) has a sub-website that is accessible in two ways. Either, through the map on the homepage of the central website (http://www.energise-project.eu) where you can get to each national website by clicking on the relevant country. Or, you can enter the domain address[1] of the relevant national website as below:

Ireland (NUIG) - http://ireland.energise-project.eu

Denmark (AAU) - http://denmark.energise-project.eu

United Kingdom (KINGSTON) - http://uk.energise-project.eu

The Netherlands (MU-ICIS) - http://netherlands.energise-project.eu

Switzerland (UNIL) - http://switzerland.energise-project.eu

Hungary (GDI) - http://hungary.energise-project.eu

Germany (LMU) - http://germany.energise-project.eu

Slovenia (FOCUS) - http://slovenia.energise-project.eu

Bulgaria (ARC Fund) - http://bulgaria.energise-project.eu

Finland (UH) - http://finland.energise-project.eu

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[1] Separate national domains can be created any time during the lifespan of the project, please contact GDI with your request and indicate your wish here:
https://docs.google.com/spreadsheets/d/1eCNnk3j6E39ya8gHxpJ2h-mzFvwhzDeDKBbsnSUiN24/edit#gid=0

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2.1. LOGGING INTO THE ADMIN PART OF YOUR NATIONAL WEBSITES

- Go to your relevant national link above
- Add to the link: **/user/login** (e.g. http://hungary.energise-project.eu -> *http://hungary.energise-project.eu/user/login*)
- Enter your **Username or email address** and your **Password**[2]
- Welcome to editing your national website ☺

Once logged in, you can

- translate the existing description of the project to your language,
- add information or create new menu(s) and/or page(s),
- create new admin users for your national site.

2.2. ADDING NEW USERS

If you want to give someone (e.g. another researcher/project assistant) admin/editorial rights to your national website, please follow the instructions below:

Choose **'People / Add a new user'** at the top of the page:

---
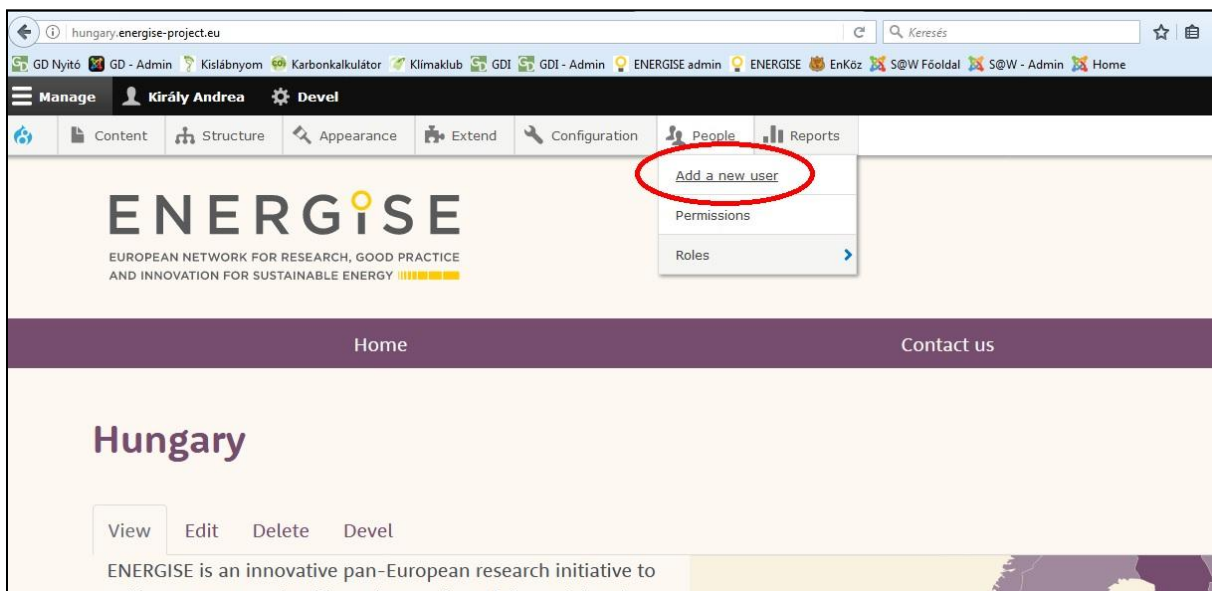
[2] Your user name and password has been sent to you individually by GDI.

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Fill in the required information (**Email address, Username, Password, Confirm password)**

Pay attention to the following settings at this page:

- **Status**: Active; **Roles**: Administrator

At the end, save the changes by clicking on '**Create new account'** at the bottom of the page.

If you entered all the data properly, you'll see the following message about successful creation of a new user account: '*Created a new uses account for ..... No email has been sent.*'
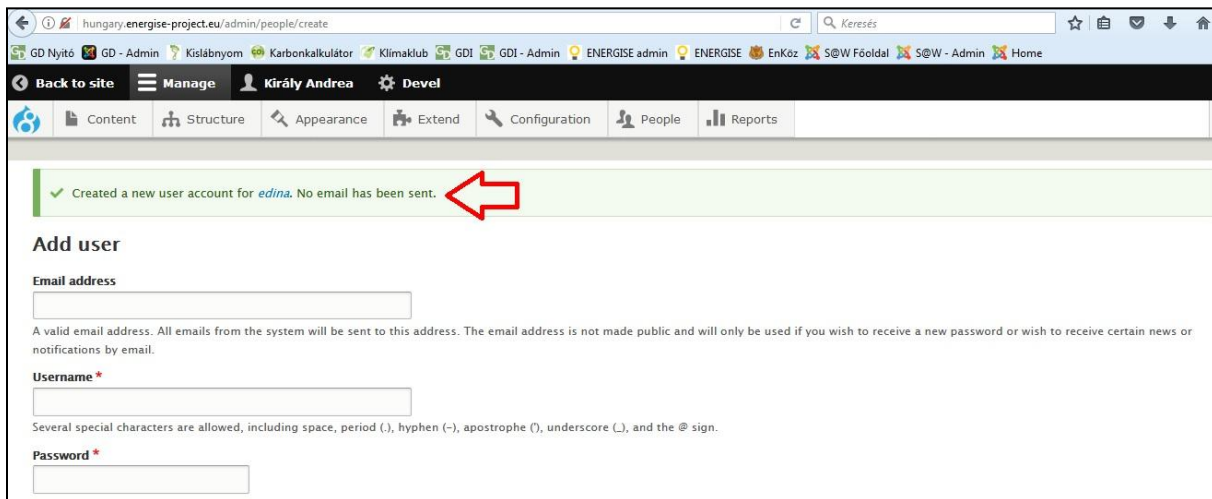
2.3. EDITING YOUR OWN ACCOUNT

Once logged in, your name (in the example: *Király Andrea*) will be shown at the top of the screen (with black background). By clicking on your name you have a chance to **View profile / Edit profile / Log out**.
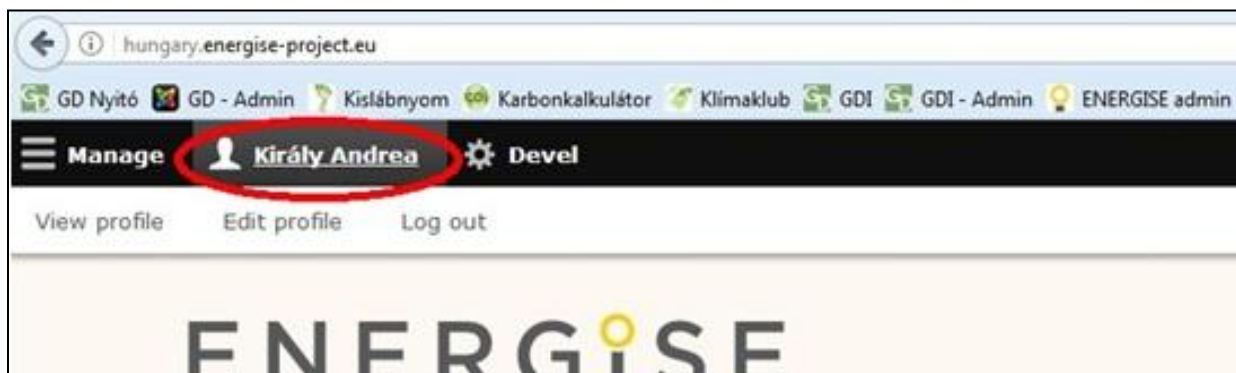
Under **'Edit profile'** you can change your password, email address or username.

If you want to cancel your account, click on **'Cancel account'** at the bottom of the page.

2.4. EDITING OTHER USERS' ACCOUNT:

If you want to edit another user's account, click on '**People'**:
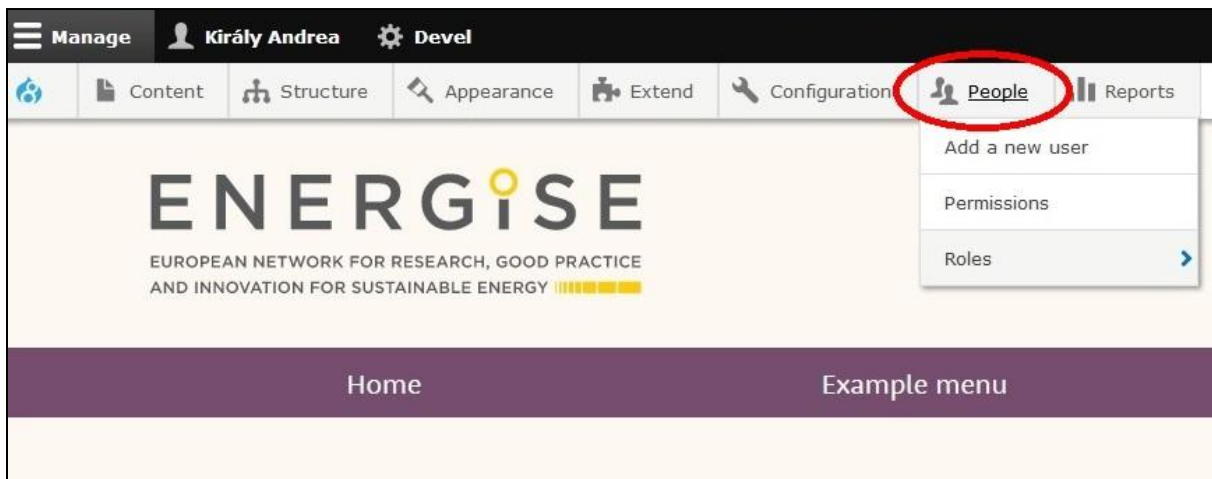
Here you can choose the user's name that you want to edit; tick the name of the user and edit his/her data (where the red arrow shows below). Pay attention to proper settings at '**Status'** (Active) and '**Roles'** (Administrator).
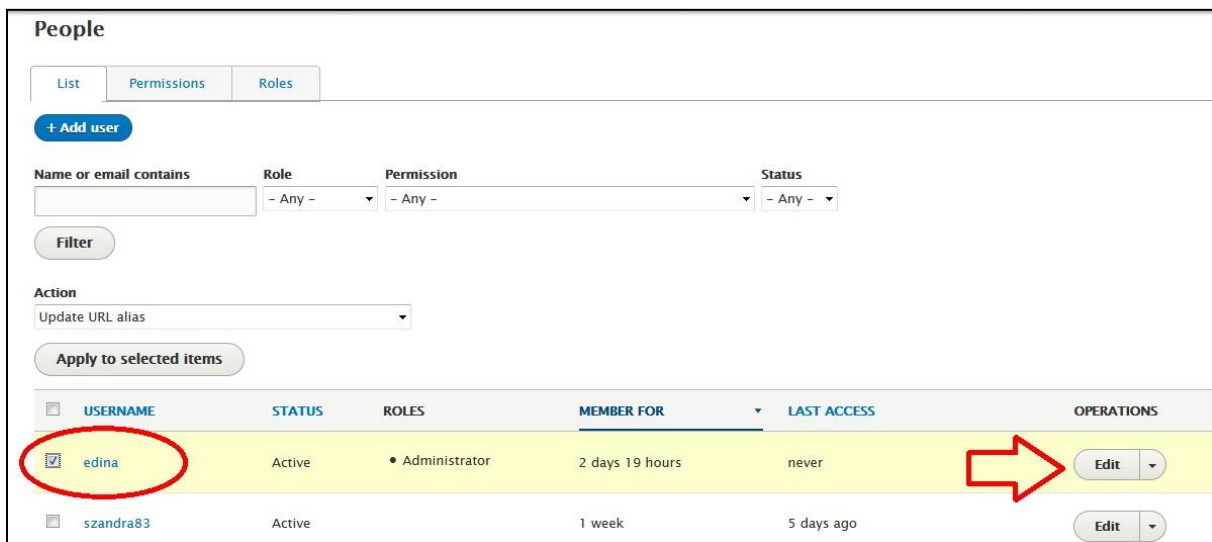
Please be careful with deleting users. Important Note: Please DO NOT delete user 'Vadovics Kristóf'!

2.5. CREATING NEW PAGES:

If you want to create a new menu item (similar to Home/Contact us) and add page(s) to the new menu item, first you need to create a new page.

Go to the menu '**Content / Add content'**. Choose and click on the menu '**Page'**.
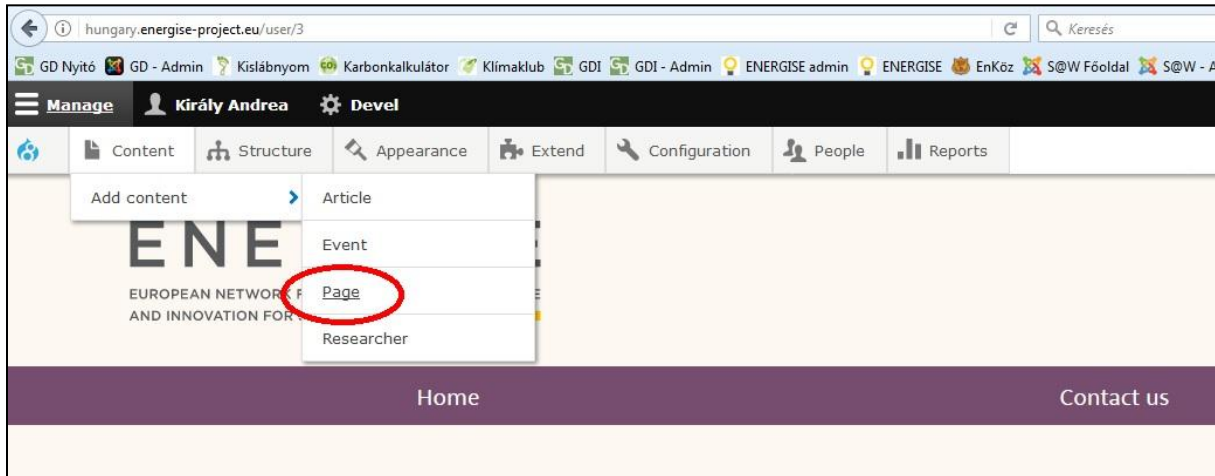
Here you can add a **'Title'** to the page (here: *Example page*), and add description in the box **'Body'** (here: *This is an example of creating a new page*).

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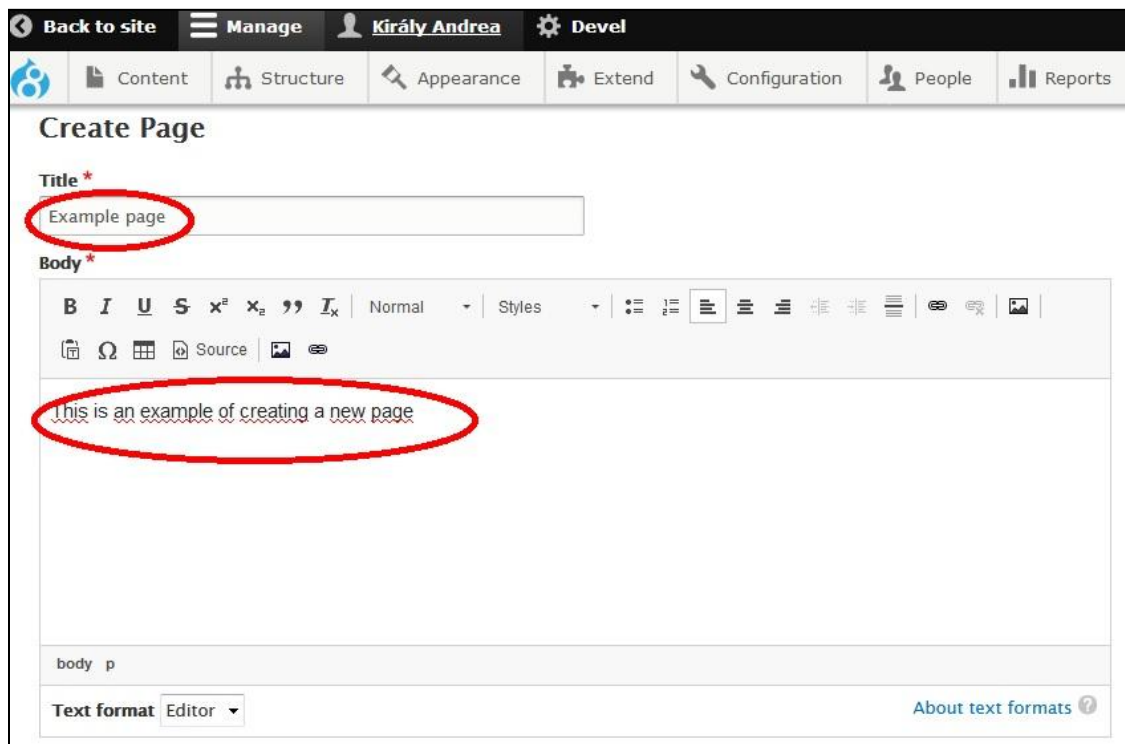
Make sure **'Text format'** under the box is set to **'Editor'** (otherwise you won't be able to edit the text)
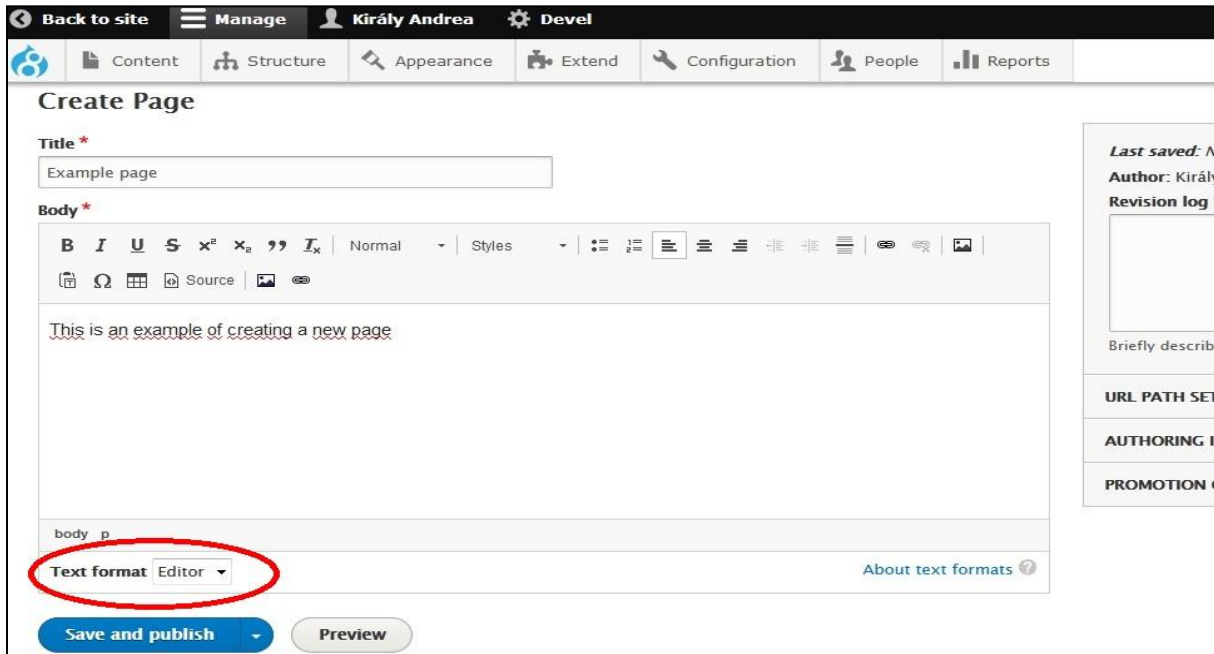
You can format your text by using font types (**bold**, *initial*, <u>underlined</u>, etc).
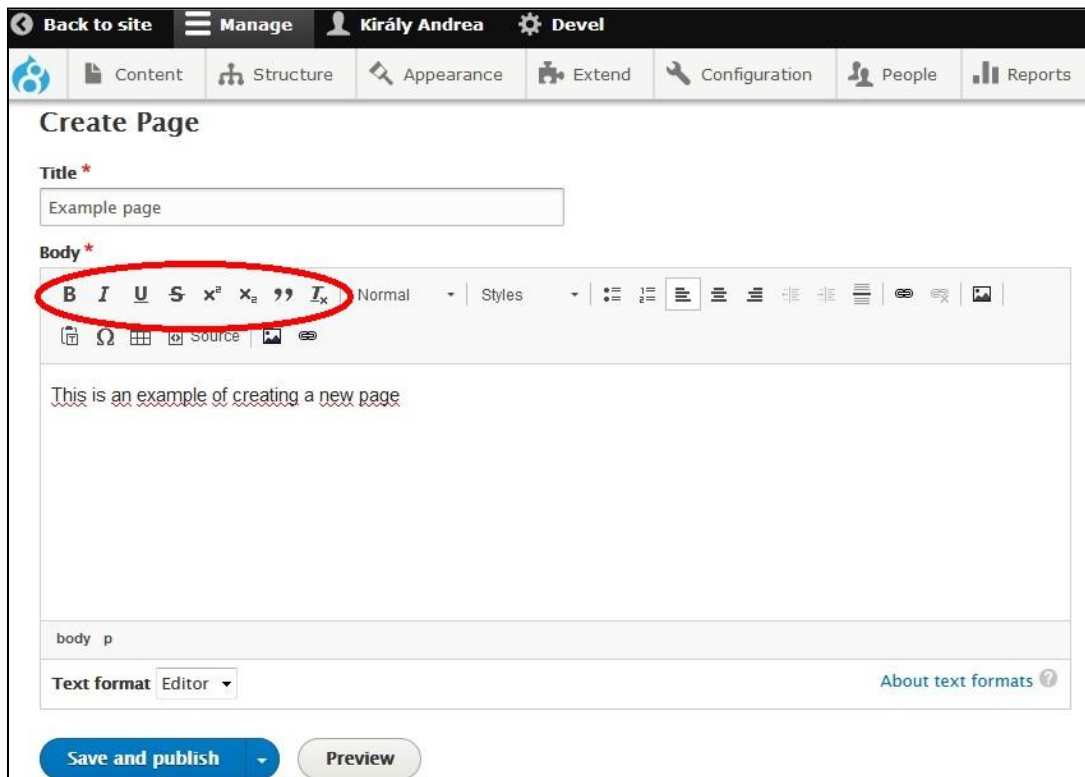
2.5.1.   ADDING LINKS

You can add links to the text with the icon **'link'**/ **'unlink'** (as shown by the red arrow below).

First click on the icon '**link**', then mark the desired text part in the '**Body**' (here: *new page*) to which you want to link a page.
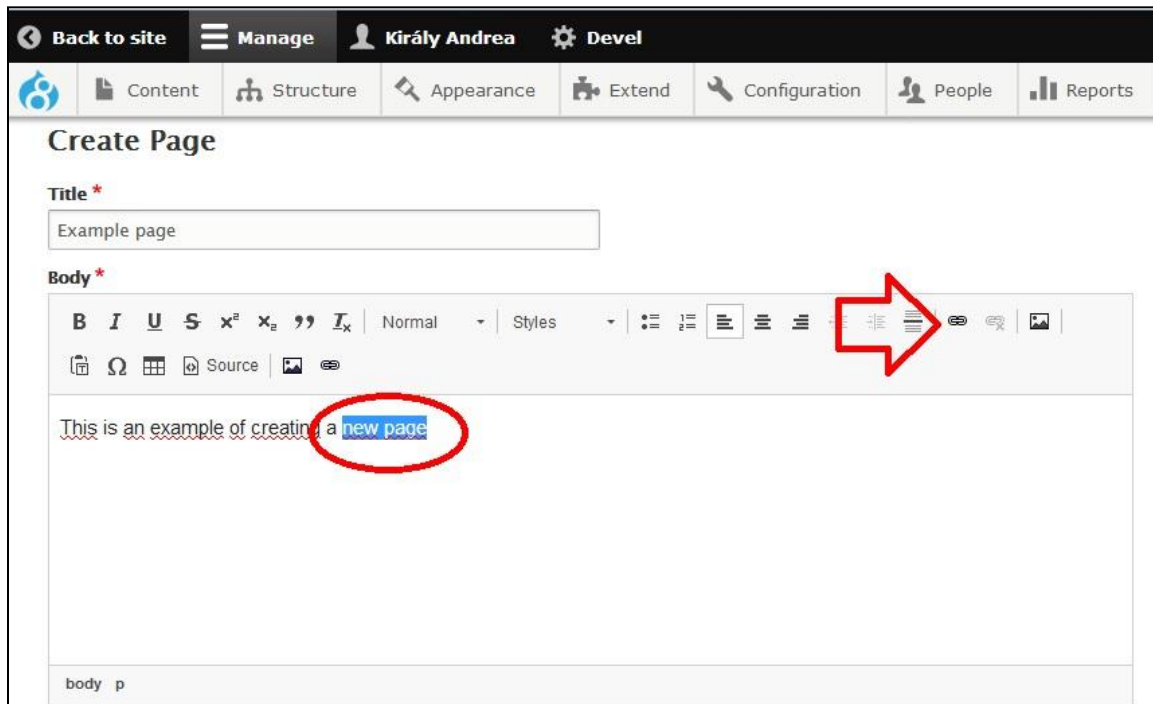
Copy and paste the desired link into the first line (URL).
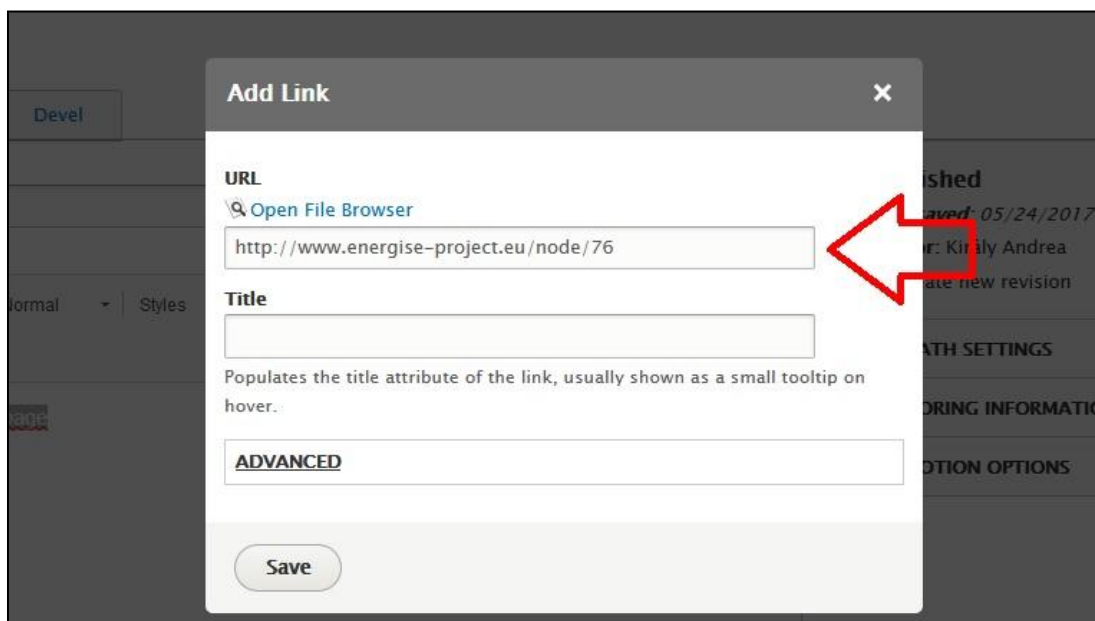
It is recommended to set the link to open it in a new window. For this, click on the menu '**Advanced**':
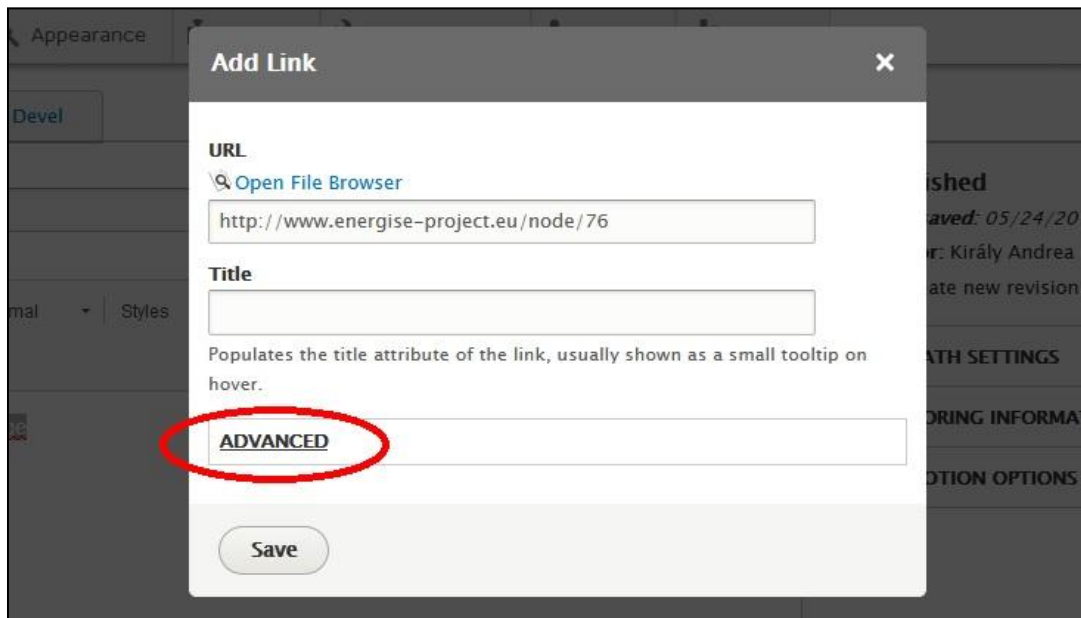
Tick the menu '**Open in new window'**, then save the changes at the bottom of the page:
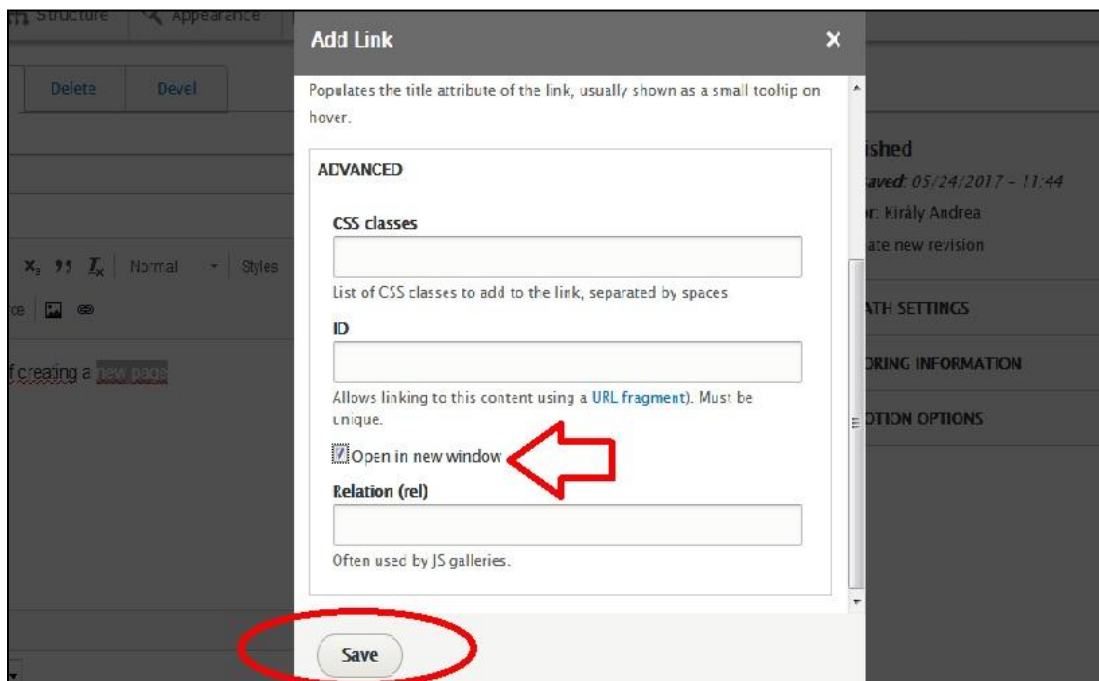
2.5.2. ADDING IMAGES TO THE TEXT:

By the aid of the icon **'image'** you can add images/photos/logos etc. to your text. Click on the icon in red circle as below:
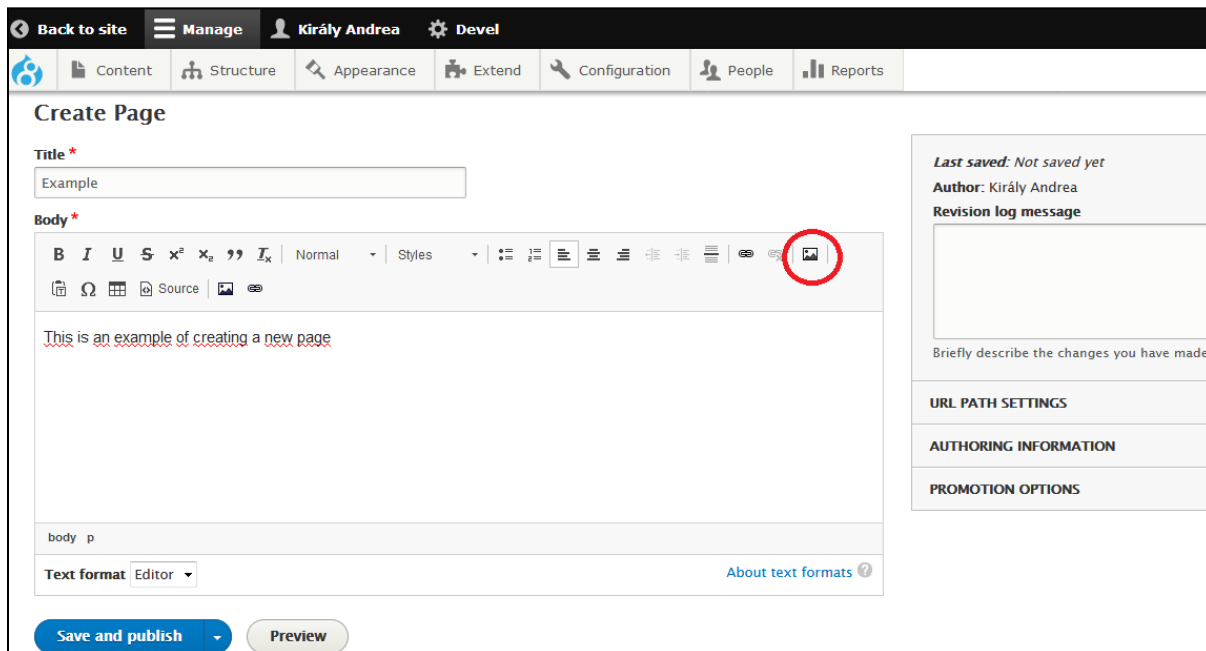
You will see the window below popping up. Here you can either upload a picture already stored in the database of the website, or you can upload a new picture from your computer.
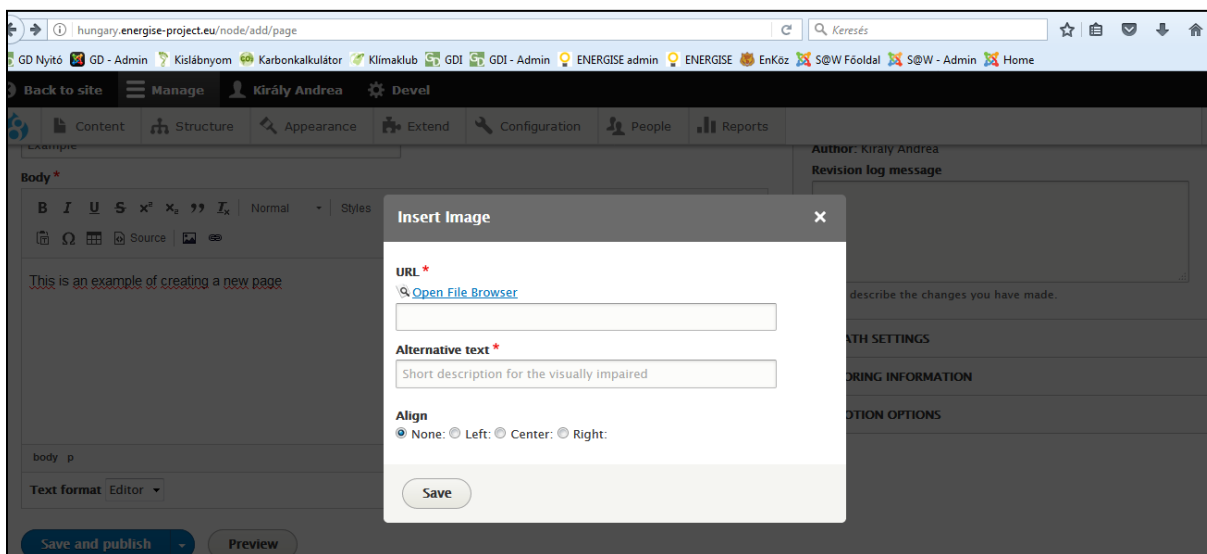
Either way, first open the link **'Open File Browser'**:
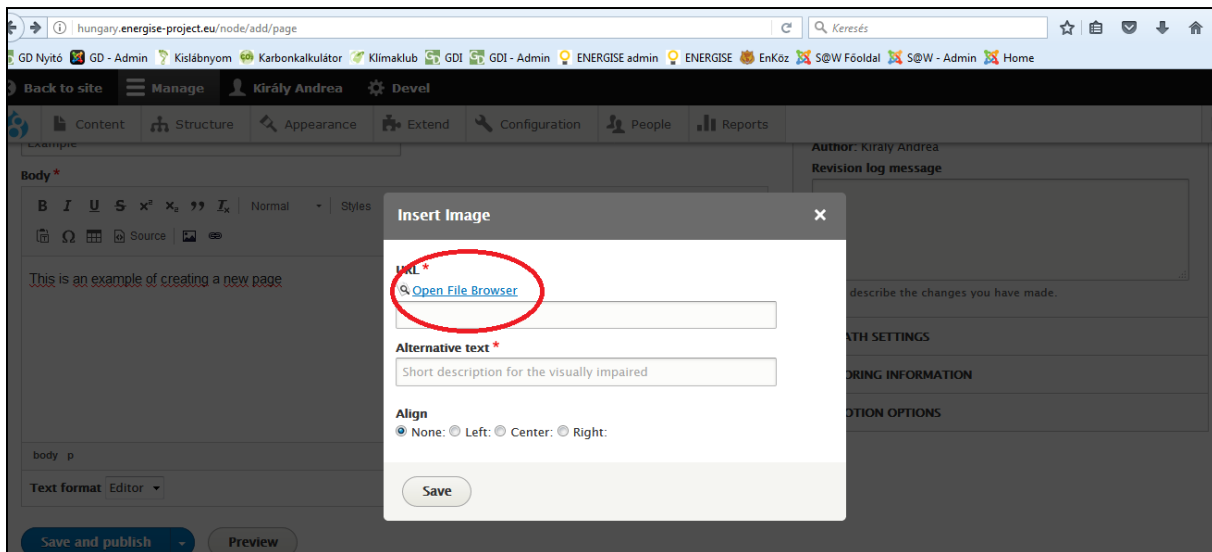
Here you can select **'Upload/add file'** (to upload a new photo[3]), or **'Select'** a photo among the existing ones.

---
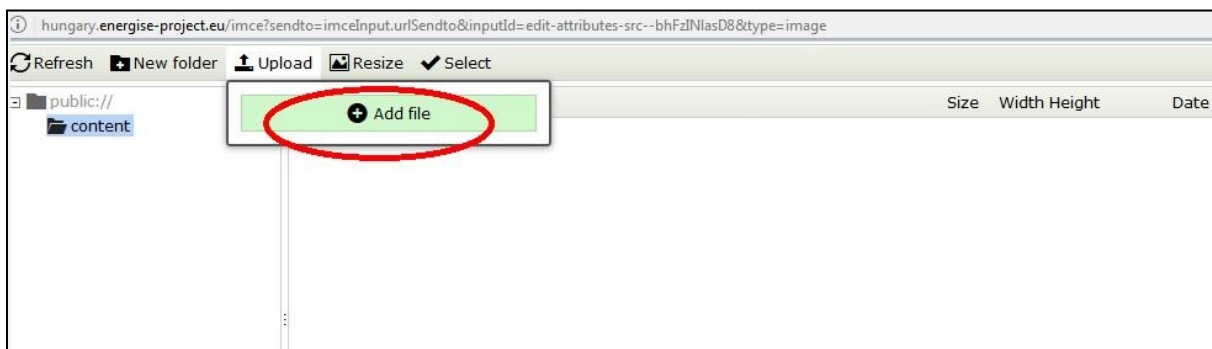
[3] Before uploading new pictures make sure you have shrunk the picture's size to fit websites (max. 100-200 kByte). Do not use larger pictures as they may slow down your website and also load in very slowly.

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Once uploaded the file chosen, you will see its link.
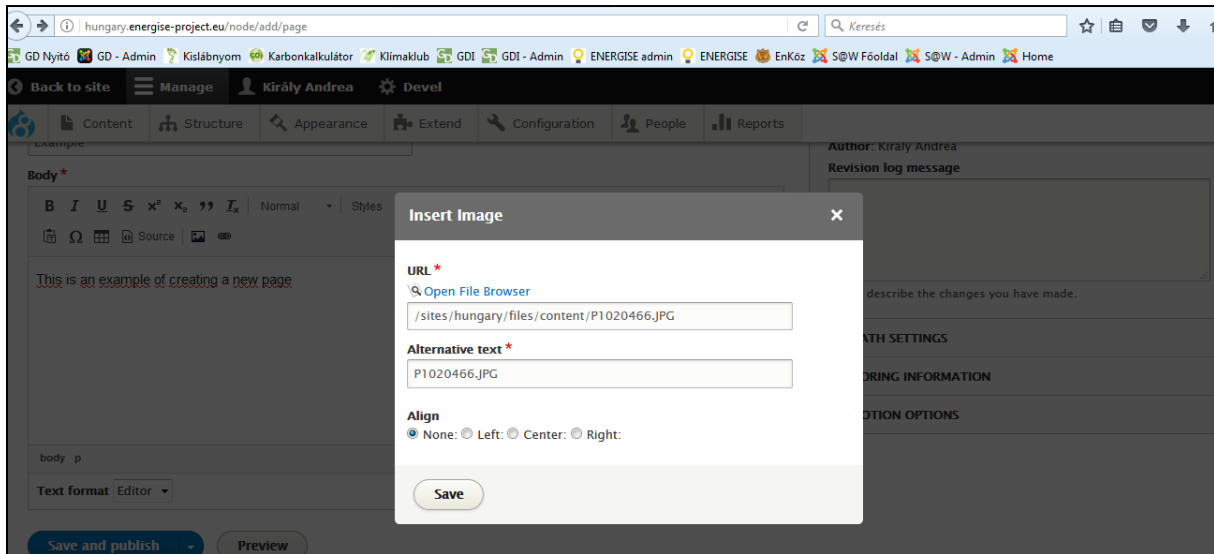
Here you can also align your picture to '**None/Left/Center/Right**' position.
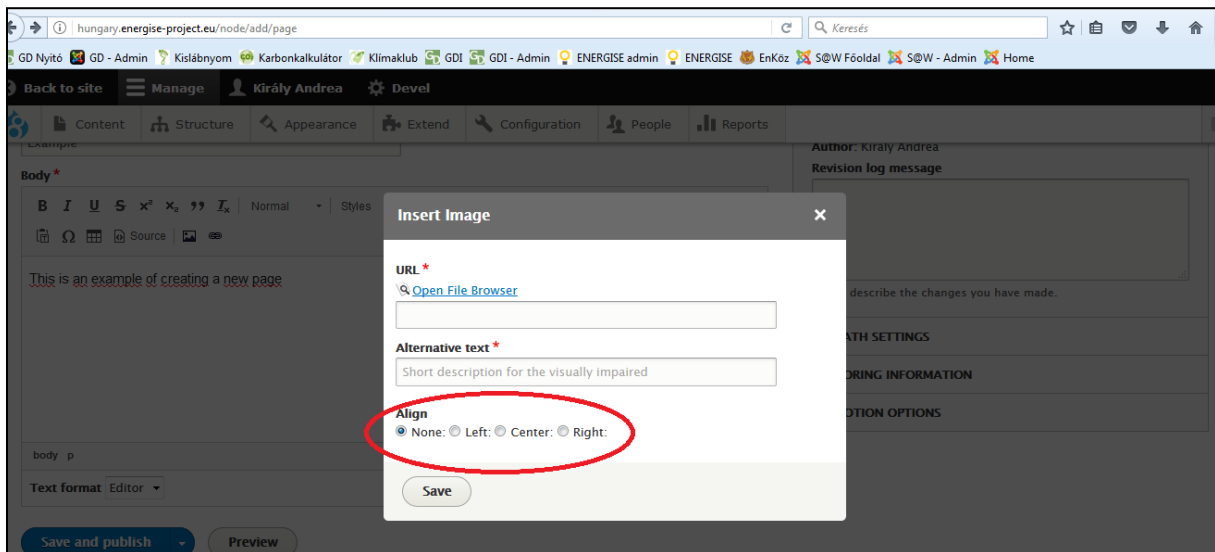
When finished editing, do not forget to click on **'Save and publish'** at the bottom.
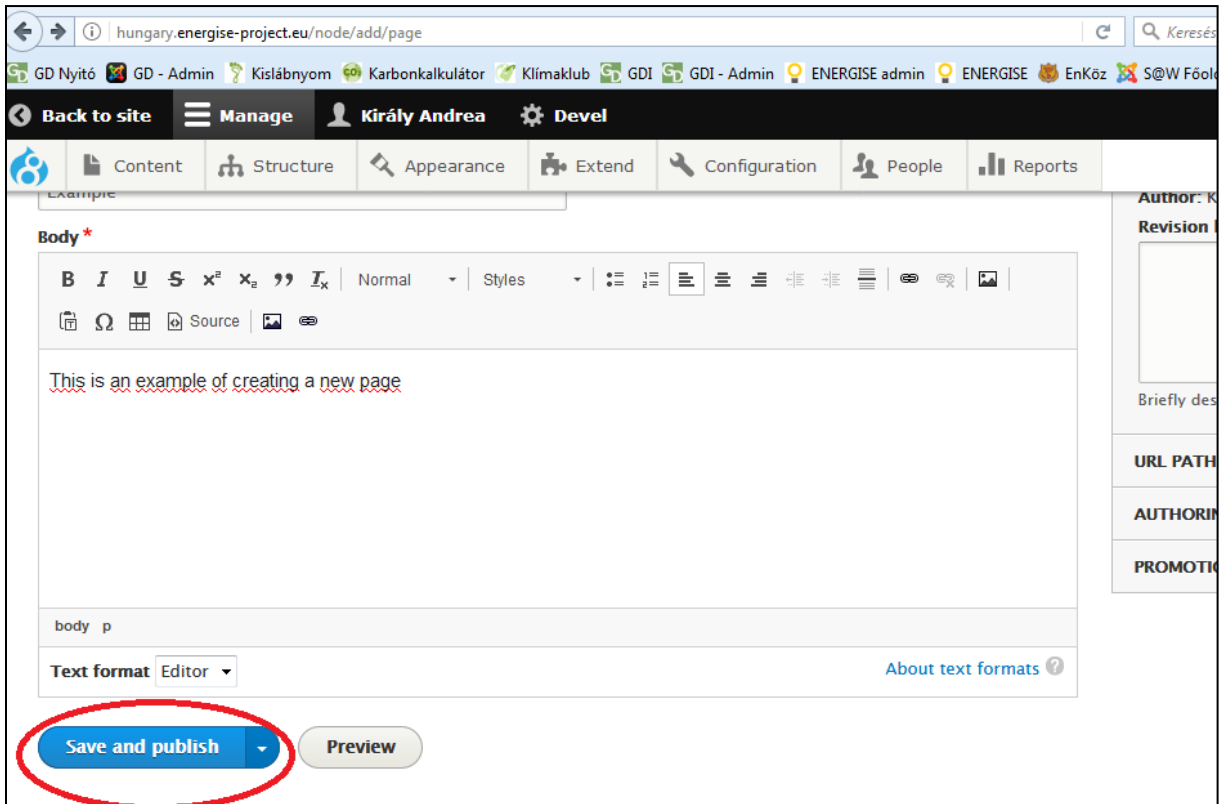
2.6. EDITING AN EXISTING PAGE

You can reach a page (here: the page called *Example page*) by clicking on '**Content**' (in red circle)
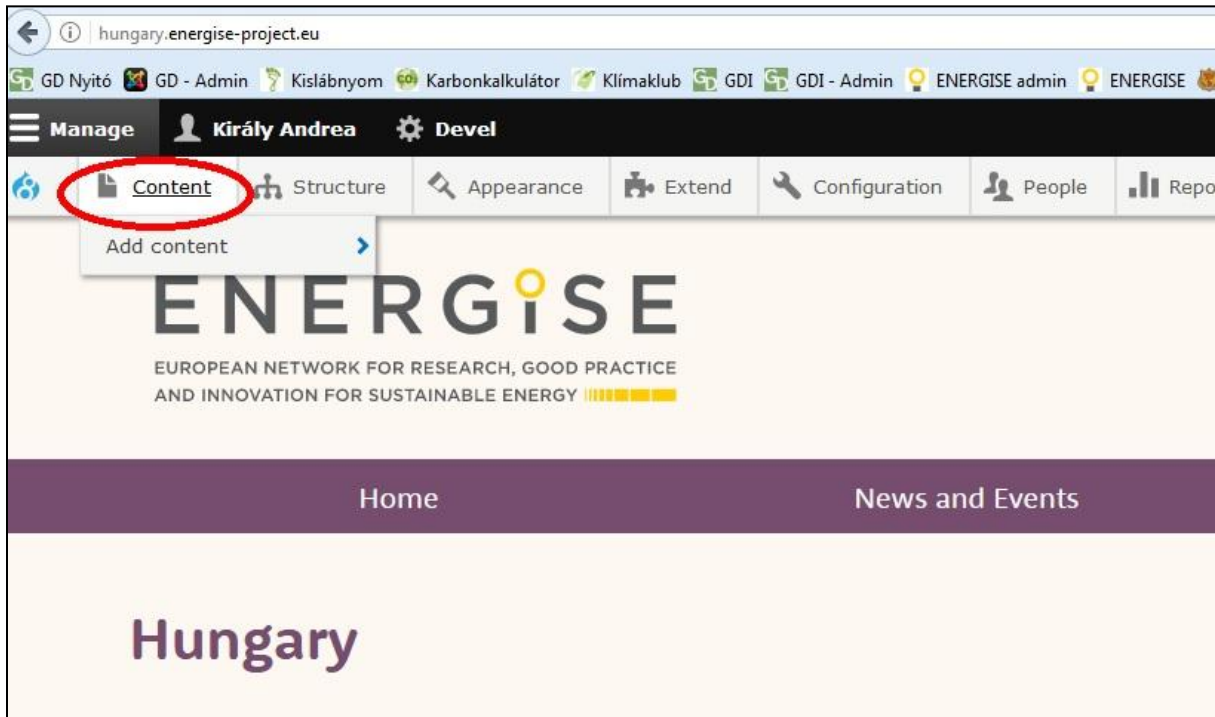
Here you can edit/delete page(s) created formerly (for these steps see '*2.5. Creating new pages*')
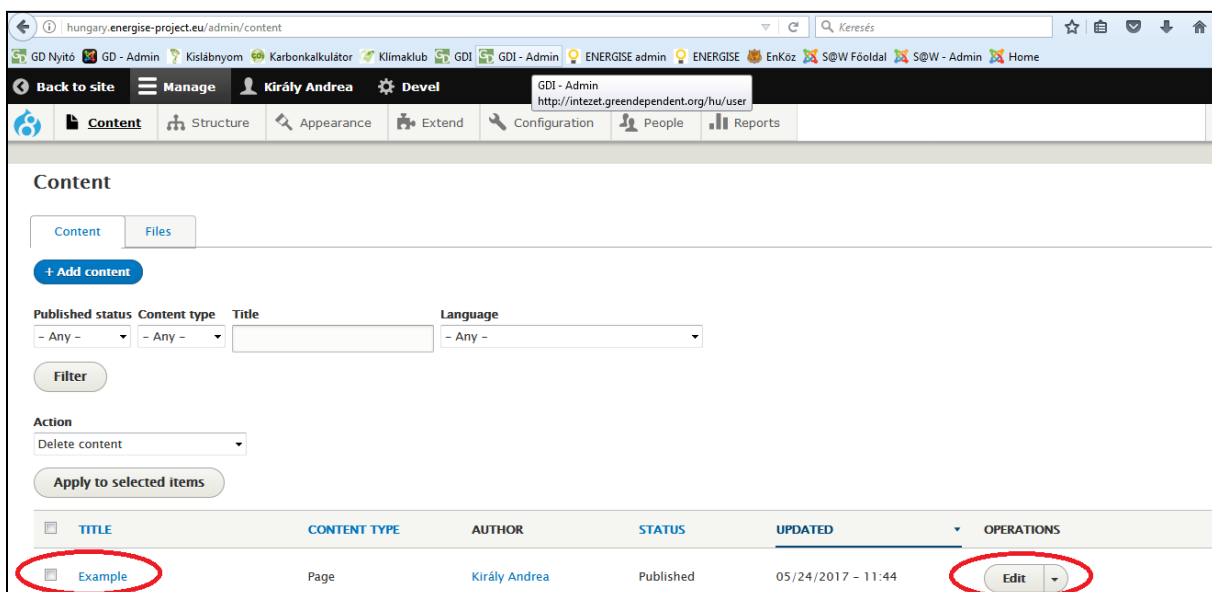
2.7. ADDING A NEW MENU ITEM

To add a new menu item choose **Structure/Menus/Main navigation/Add link**:
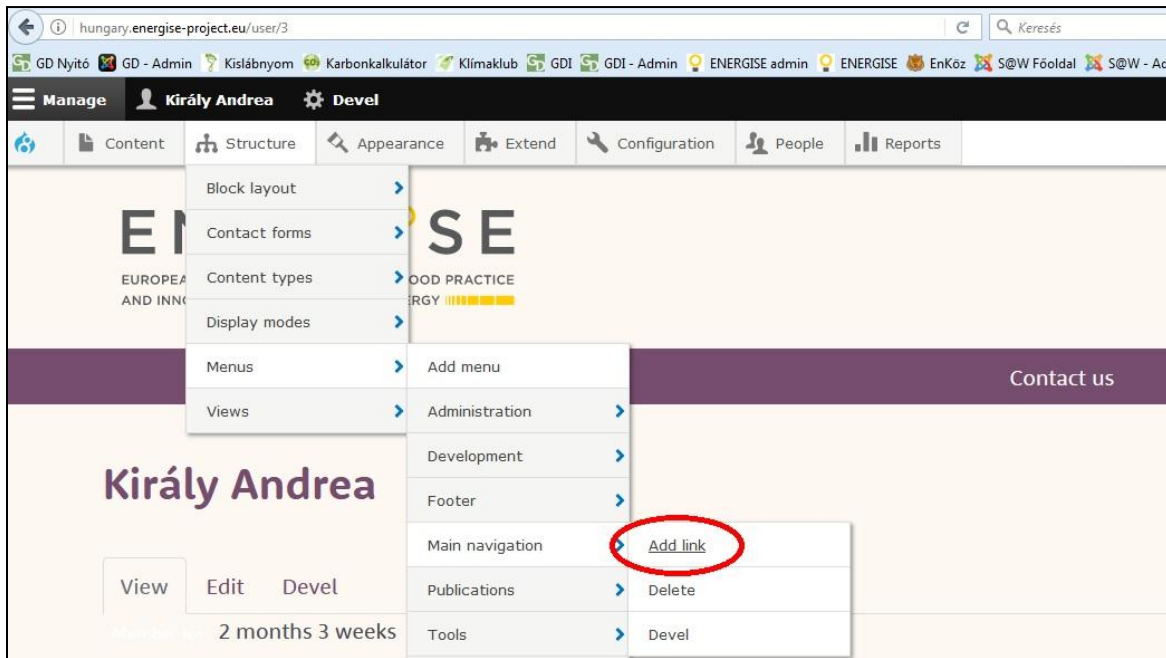
By clicking on **'Add link'** you can give a **'Menu link title'** (here: *Example menu*; this will be presented on the menu bar such as *Home/Contact us*), and you can add a **'Link'** (which is basically the page you want to attach to the menu item). If you start typing the page's name in the text box of **'Link'**, it will automatically find it.

After saving your changes you will get the following message: '*The menu link has been saved.*'
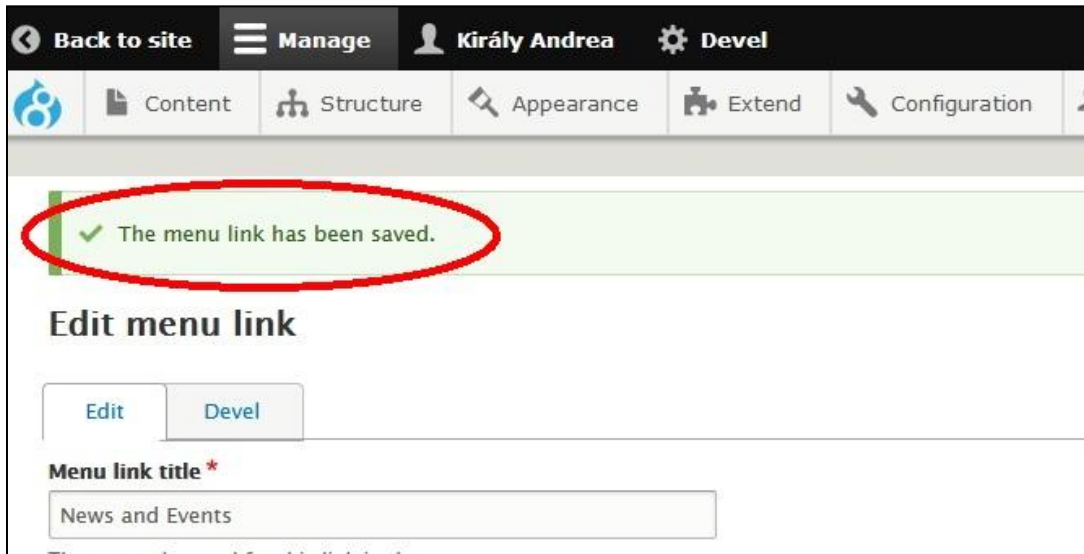
By going back to the site you can check whether the new menu has been added:
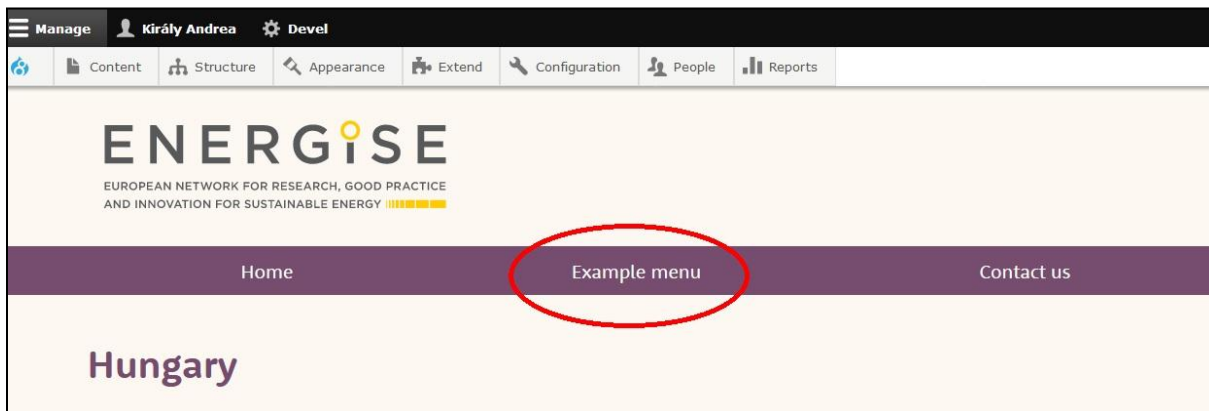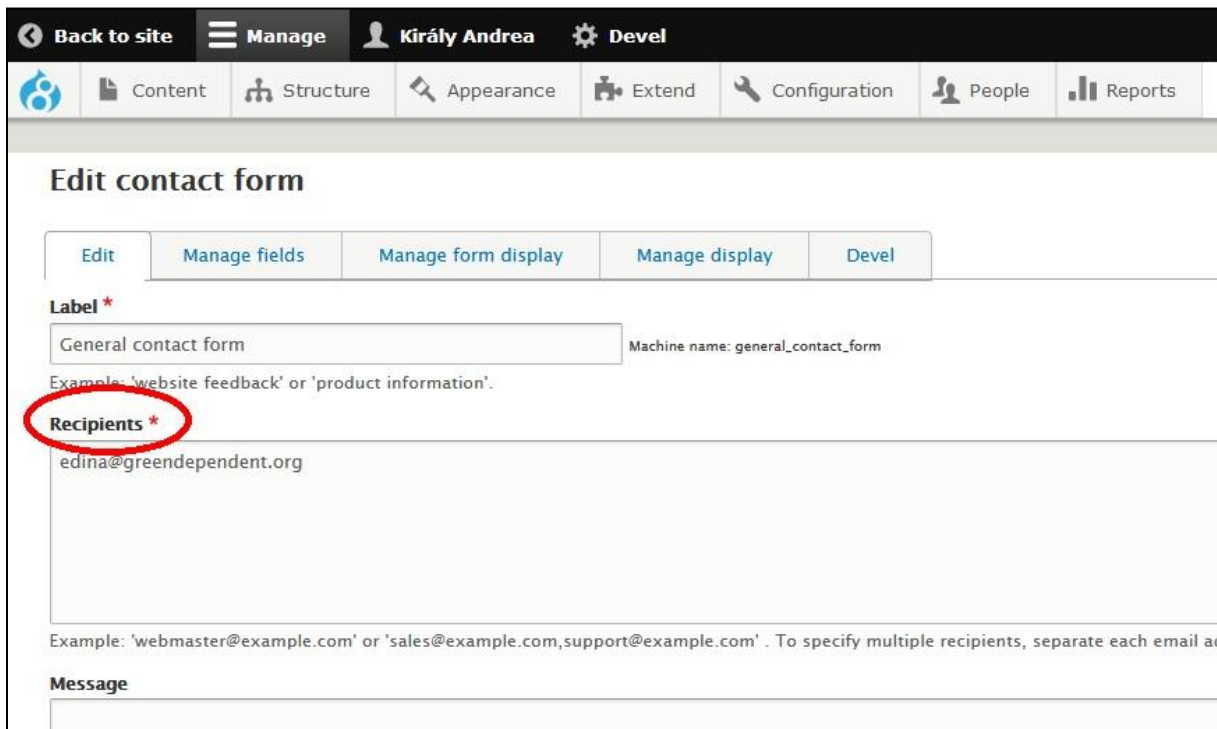
2.8.   CHANGING THE CONTACT FORM:

Choose **Structure / Contact forms / General contact form**
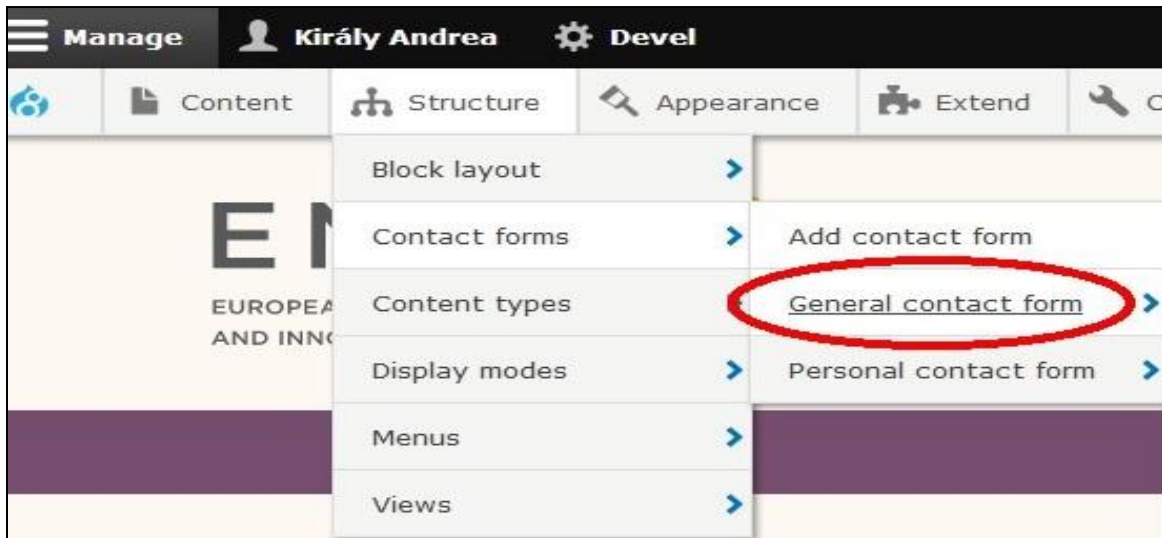
Click on **General contact form** where you can edit the email address under '**Recipients**' (leave the Label – general contact form – untouched) and save your changes:

TRAINING ON NATIONAL WEBSITE MANAGEMENT WP7

Presentation by Kristóf Vadovics (GDI)

27ᵀᴴ JULY 2017

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° Introduction to the central website

° Introduction to the national websites

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    ° Adding new users

    ° Editing your own account

    ° Editing other users' account

    ° Creating new pages

    ° Editing an existing page

    ° Adding a new menu item

    ° Changing the contact form

° Q&A

ENERGISE

° www.energise-project.eu

　° Managed by GDI

NATIONAL WEBSITES

- E.g. www.hungary.energise-project.eu
  - Managed by partners
  - See list in manual for each country
    - Ireland (NUIG) - http://ireland.energise-project.eu
    - Denmark (AAU) - http://denmark.energise-project.eu
    - United Kingdom (KINGSTON) - http://uk.energise-project.eu
    - The Netherlands (MU-ICIS) - http://netherlands.energise-project.eu
    - Switzerland (UNIL) - http://switzerland.energise-project.eu
    - Hungary (GDI) - http://hungary.energise-project.eu
    - Germany (LMU) - http://germany.energise-project.eu
    - Slovenia (FOCUS) - http://slovenia.energise-project.eu
    - Bulgaria (ARC Fund) - http://bulgaria.energise-project.eu
    - Finland (UH) - http://finland.energise-project.eu

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- Go to your relevant national link – either
  - Type in the domain
  - Click onto your country map in the central site
- Add to the link: **/user/login**
  (http://hungary.energise-project.eu/user/login)
- Enter your Username or email address and your Password
  – *sent to you by GDI earlier*

- **LOGIN**

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° Welcome to editing your national website ☺

° There are two options

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° Choose **'People / Add a new user'** at the top of the page

○ Under **'Edit profile'** you can change your password, email address or username

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° If you want to edit another user's account, click on '**People'**

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○ Pay attention to proper settings at '**Status'** (Active) and '**Roles'** (Administrator). **EDIT ACCOUNT**

○ **Please DO NOT delete user 'Vadovics Kristóf'!**

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- Go to the menu '**Content / Add content'**. Choose and click on the menu '**Page'**
- **CREATE PAGE**
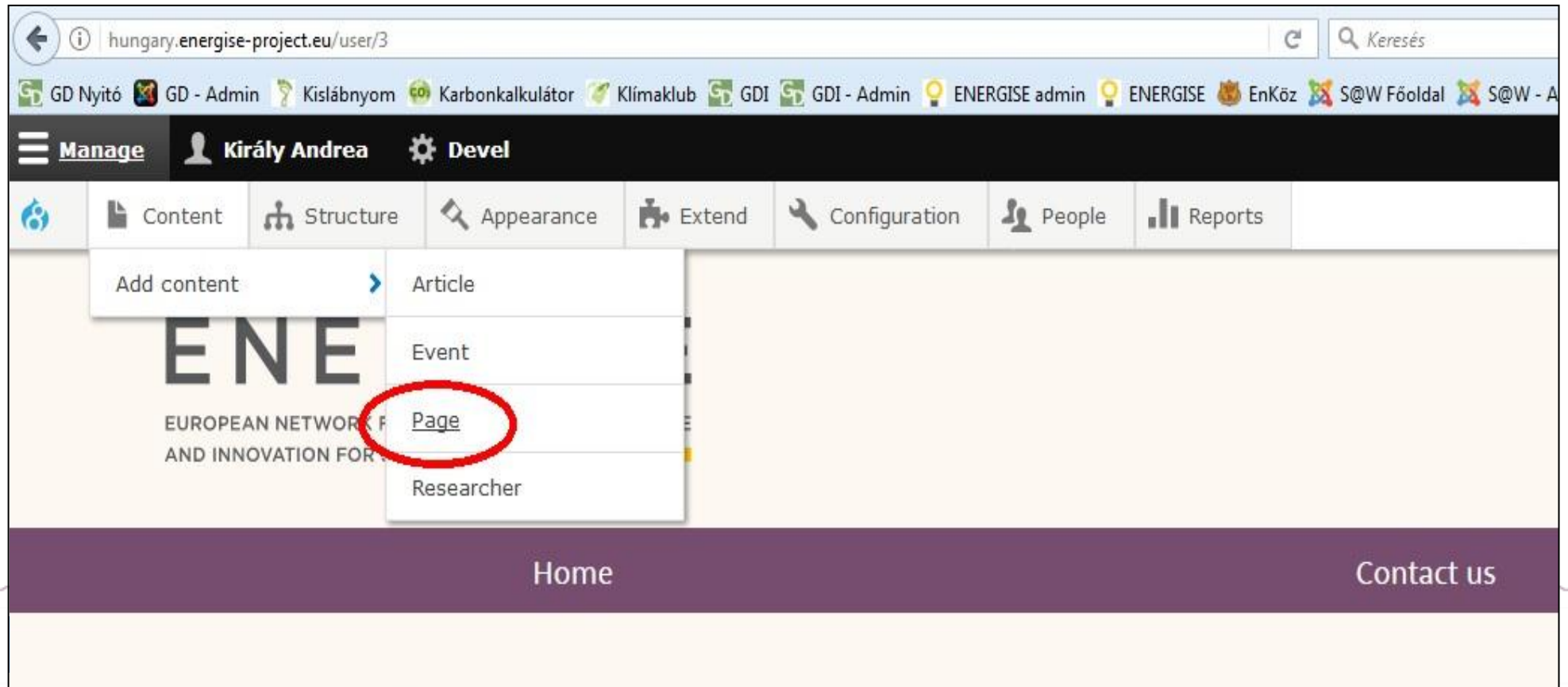
° click on '**Content**'   **EDIT HOME PAGE** *(subcribe link)*

○ To add a new menu item choose **Structure/Menus/Main navigation/Add link** **ADD NEW MENU**

° Choose **Structure / Contact forms / General contact form**

Q&A

- Questions?

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THANK YOU FOR YOUR ATTENTION

GREENDEPENDENT INSTITUTE

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Manual for Energise online monitoring tool

Manual to instruct project partners in the usage of the online monitoring tool. Please follow the guidelines below when using the tool.

1. **Login**
2. **Create participant group**
3. **Choose Questionnaire template**
4. **Translate and edit questionnaire**
5. **Schedule delivery**
6. **Reminders**
7. **Export data**

Login

You will receive an email invitation to create a username and password. If you have not received an email please contact your local team lead. Follow the instructions in the email.

- To login visit http://energise.staging.betawerk.eu/user.
  (the URL will change. Always add /user behind the domain)
- Enter your username and password.

Log in

Log in | Reset your password

Username

Enter your Energise Online Monitoring username.

Password

Enter the password that accompanies your username.

Log in

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Create participant group

In order to start distributing a survey you must first define the participants. You can have multiple participant groups.

- Go to '**Participants**' in the left side menu.
- You can see an overview of your participant groups. Only groups from your own country are visible.
- Click '**Create participant group**' to add a new group
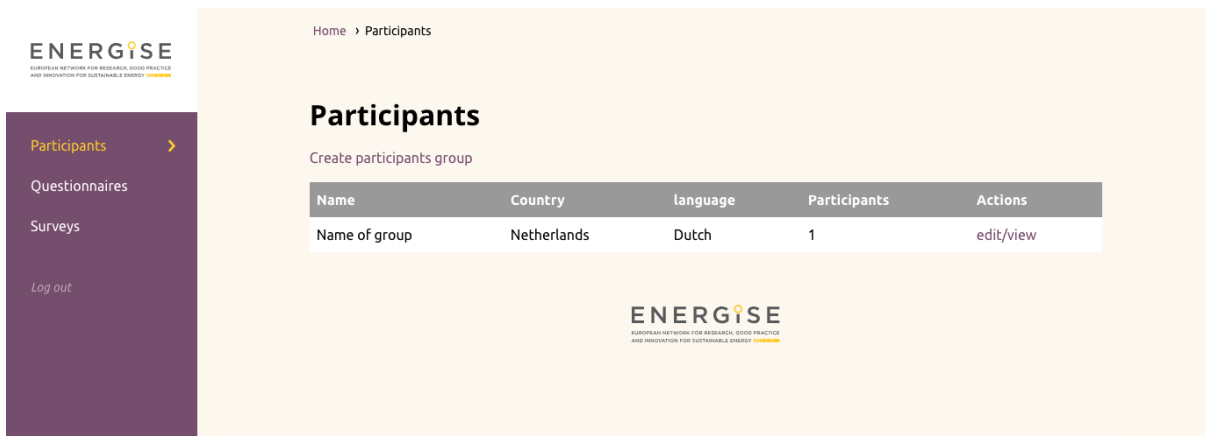
- Enter the **'Name'** of the participant group.
- Select the **'Language'** for this group and save.
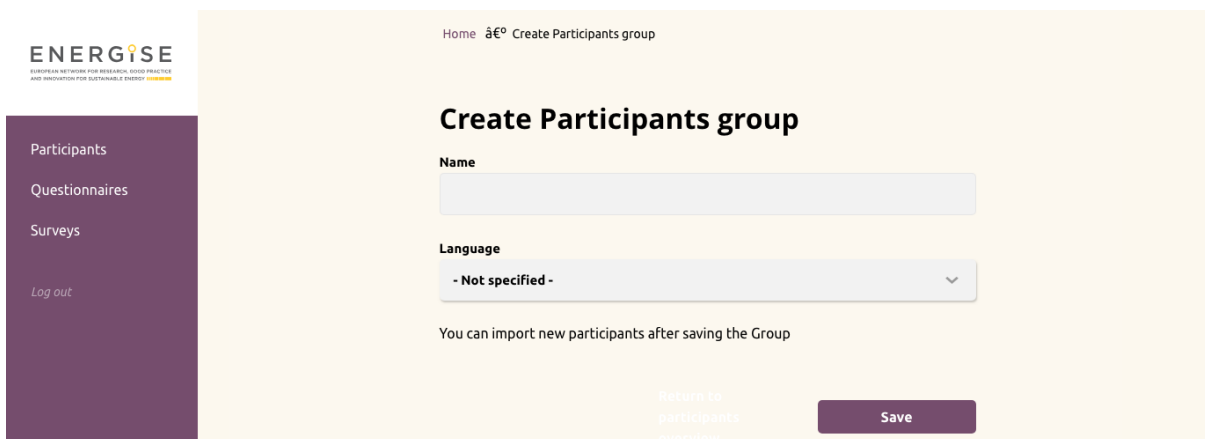
- The group is created as displayed in the green message at the top of the page.
- You can add individual participants or upload the participants in bulk by using an Excel document.
  - Individual:
    - Click '**Add new participant**'.
    - Add **'Name'**, '**Email Address**' and '**phone number**'.
  - Bulk
    - Download the '**Participant Excel template**' from the page.
    - Upload the filled-in template in the file upload field and save.
- Participants can be modified until the first survey has been sent. After this the participants are locked. However, they have the option to unsubscribe. You also have the option to manually cancel a participant subscription to the survey.

Choose Questionnaire template

English templates of each survey tool will be available in the **'Questionnaire'** section. All text elements (questions, answers, explanatory text fields, etc.) can be translated. Every template will only need to be translated once and can then we duplicated for repeated use (e.g. in case of the weekly survey.)

- choose **'Select'** to use a template as a base for your survey. A duplicate will be created which you can translate and use.
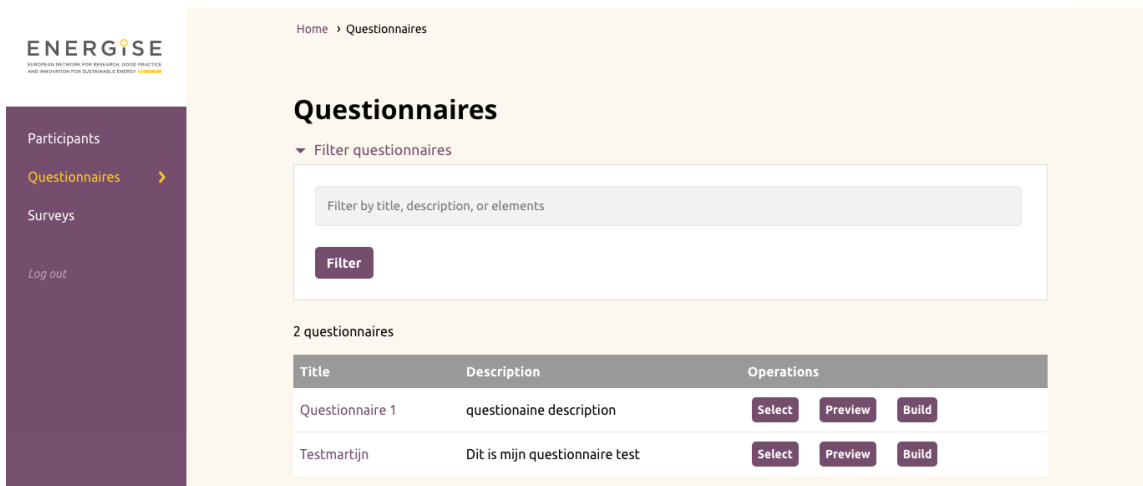
- All settings and text are moved to your duplicate version of the questionnaire. You can now translate the text to your own language.
- Edit the **'Title'** of the questionnaire.
- Edit the '**Description'** of the questionnaire. This description will be displayed for participants at the top of the questionnaire.
- To ensure that the correct privacy statement and EU disclaimer is displayed in your translated version, please select **'Language'** and **'Group'**.. You can only select groups from your own country. The language has to match the group language selected in the first step.
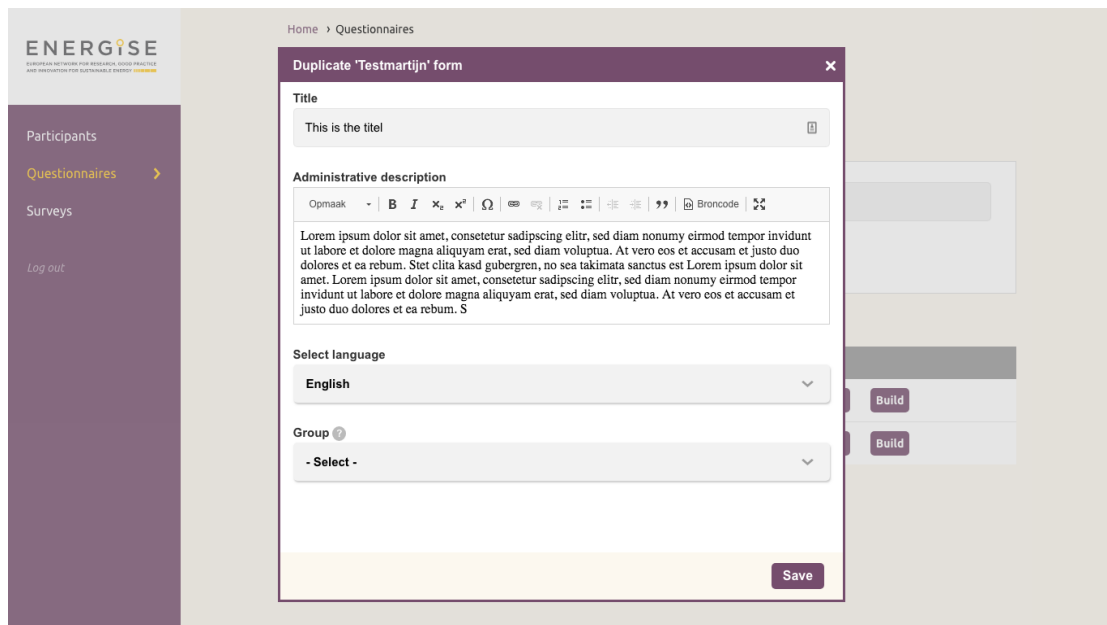
Choose Questionnaire template

All elements of the questionnaire are listed and can be edited. When a template for the first time take care to translate all text.. The options for the questionnaire are split up in four tabs.

- **'View':** preview the questionnaire.
- **'Build'**: edit and translate all form elements.
- **'survey'**: prepare the survey for launch once all text has been translated.
- **'Settings'**: Adjust name, description, language, group selection and email and reminder text (see step 'Reminders').. More details about settings later in this document.

(*New elements and pages can also be created. Please follow consortium agreements for using these features*)

- Click **'Edit'** next to the element you wish to change or translate.

- A panel opens allowing you to edit all text and values. Please translate all the text fields and save.
- The following types of questions can be found there:
  - text area (long text answer)
  - text field (short text answer)
  - Number (report numerical answers)
  - Checkboxes (allowing selection of several answer options)
  - Radio buttons (allowing selection of one answering option)
  - basic html markup (explanatory text included in the survey)
- Text area, Text field, Number, checkboxes, radio buttons and basic text markup
- Important: To allow for easy cross-country comparison, please do not change the value of answering options of multiple choice questions. Only change the text!

- Once all form elements are translated and checked using the 'View' mode to preview the survey, go to the tab 'Settings'.go to the tab **'Settings'.**
- On the settings tab you have the following sub-tabs available:
  - **'General':** Adjust name, description, language, group selection.
  - **'Form':** You can close the form here after it has been launched. Also the option to add a custom message. Please translate if needed.
  - **'Confirmation':** Translate the confirmation message participants get to see after the questionnaire is submitted.
- **'Save'** the questionnaire
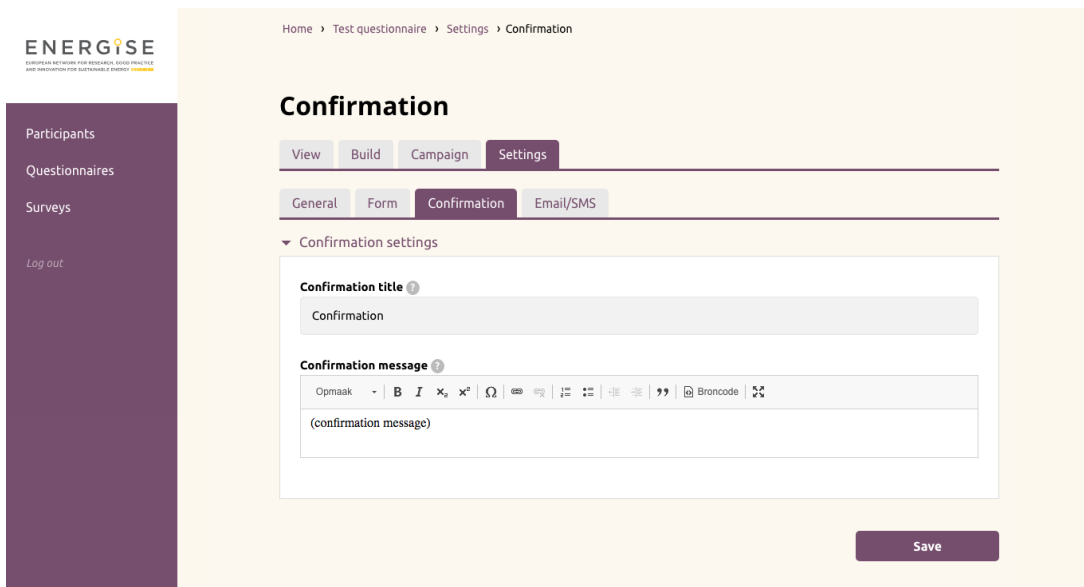
Schedule survey delivery

Once you have added a participant group and used/translated a questionnaire you are ready to send out the survey. Save the questionnaire and go to **surveys**.
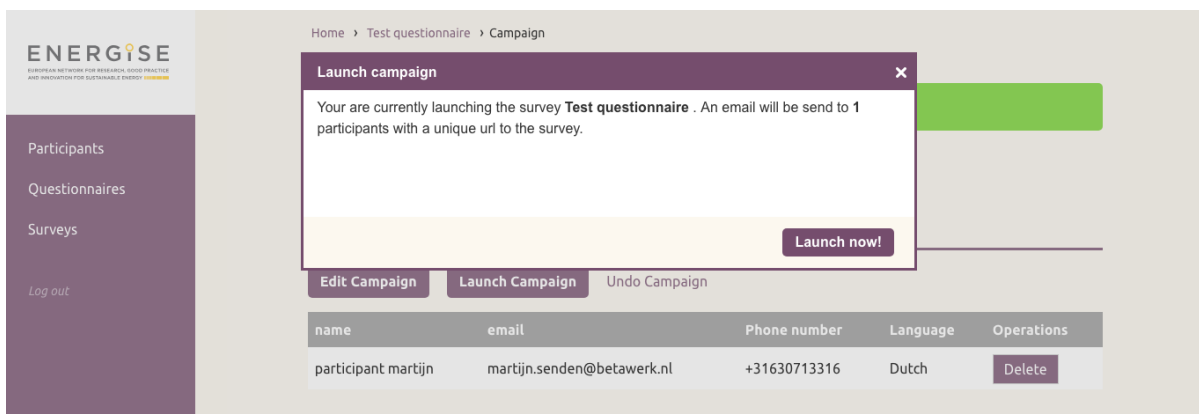
- Go to '**Surveys'** in the left side menu.
- Click the survey you wish to send out.
- *If you would like to send out again a survey that was already sent out before, you can also select 'Duplicate' instead of 'view'. All settings from that survey are copied into a new survey.*
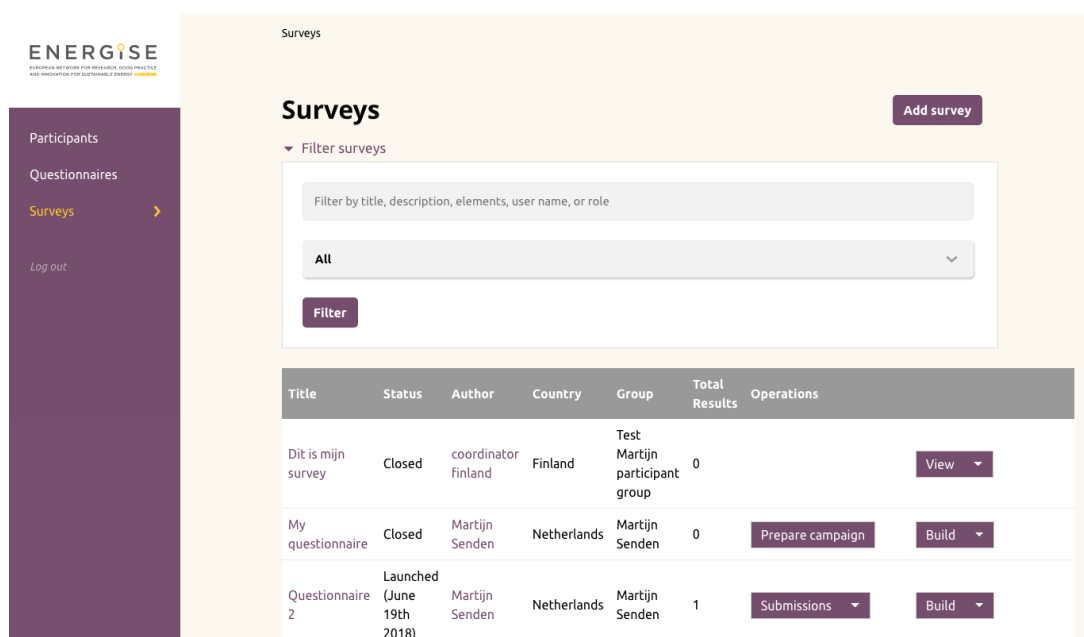
- Click the '**Prepare survey**' button.
- Optional set a '**Schedule survey**' date and time and save.
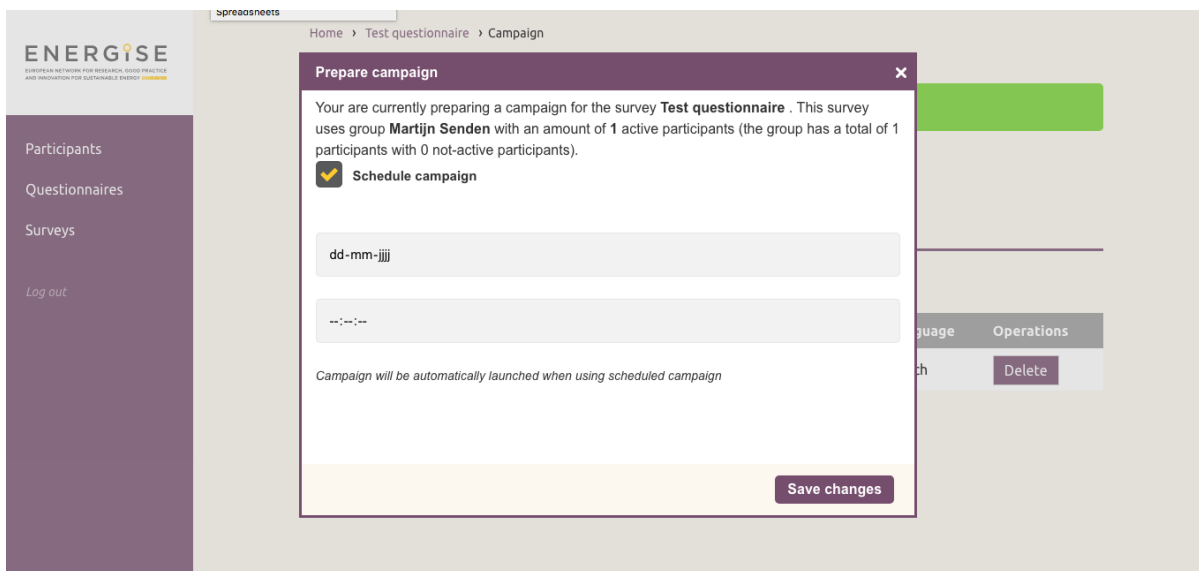
- The survey has not been sent yet. Click '**Launch survey**' button.
- The final step is to click '**Launch now!**'
- Congratulations, the survey has successfully been sent.

Reminders

Once a survey is sent, you have the option to send out an e-mail or SMS reminder. Please follow consortium agreements regarding the handling of reminders. (note: there are costs involved in sending out SMS reminders).

- Go to '**Surveys'** in the left side menu.
- Click the survey for which you would like to send an reminder.
- Click the **'Survey reminder'** button.
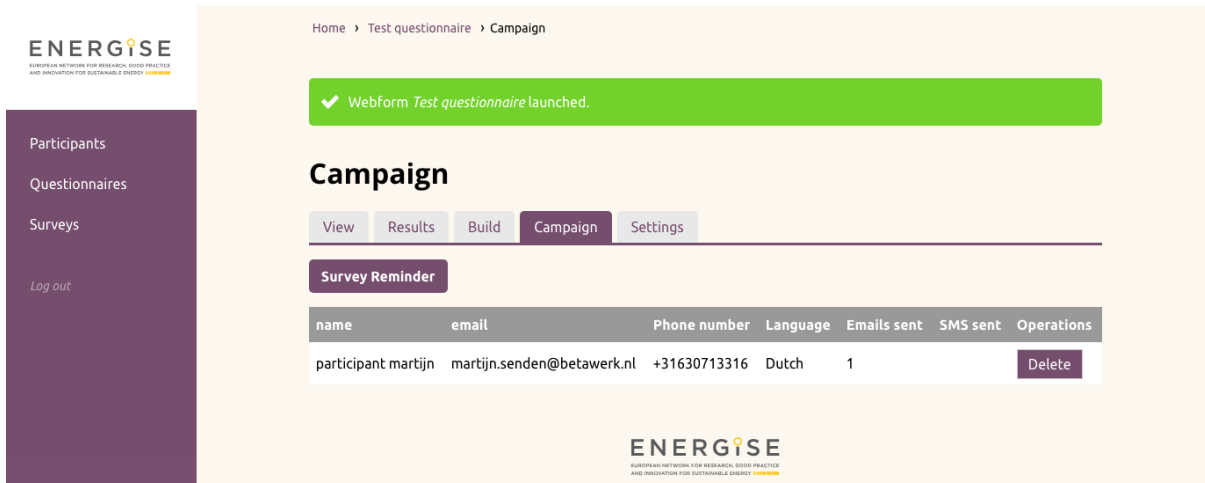
- Choose the reminder type you wish to send out and click '**Resend survey now!**' (in the settings tab the text for the reminders can be modified).
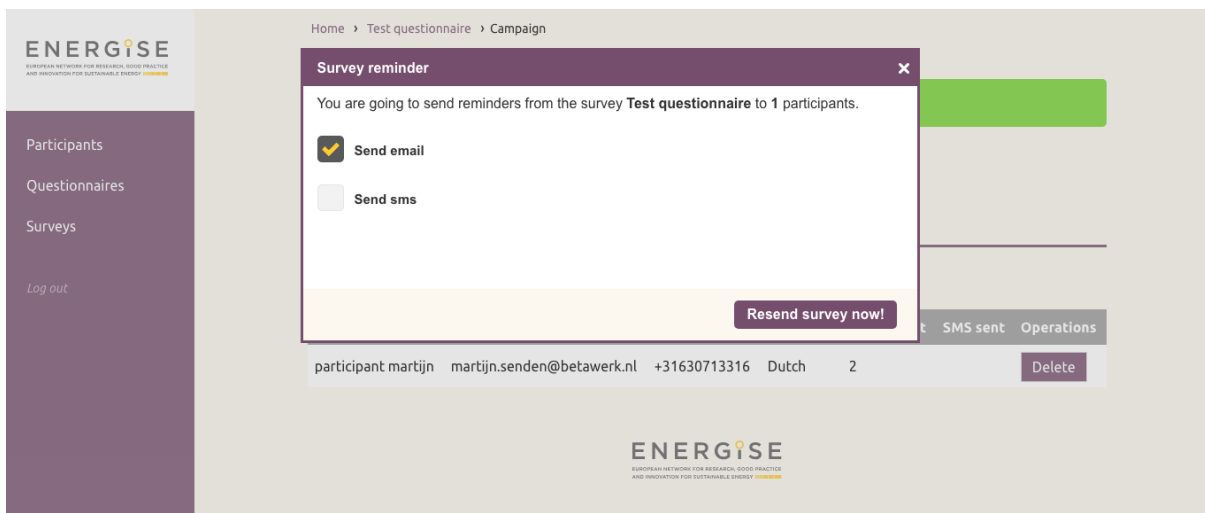
Download data

To download the data visit the survey page. The data of all sent-out surveys can be downloaded. This includes the surveys from other countries. However, the participant data will be anonymized.

- Go to '**Surveys'** in the left side menu.
- Click '**Submissions'** to view the results or click **'Download'** to download the data.
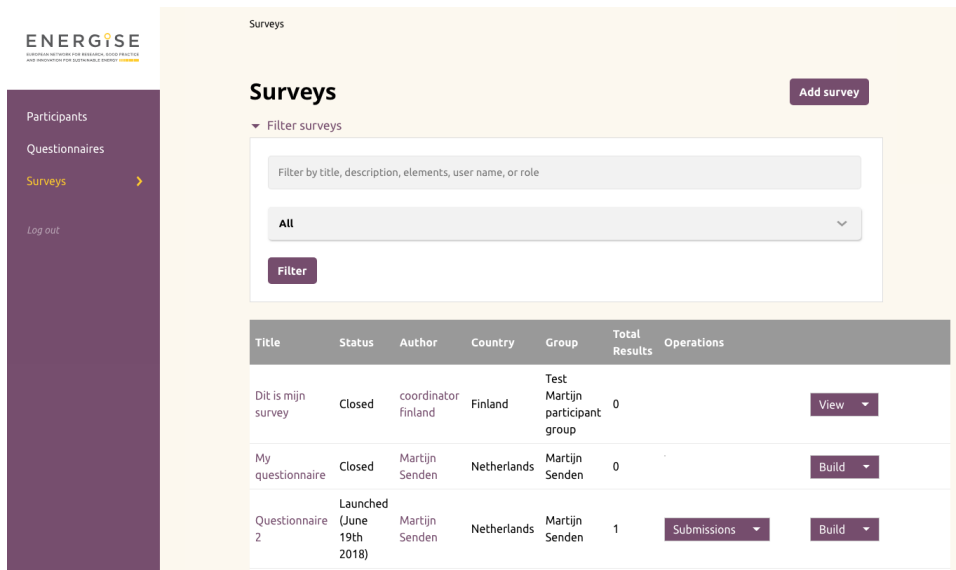
- When downloading check the option '**Generate Excel compatible file**'
- The other settings don't need changing. Click **'Download'**.