

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
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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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Authors: Kristóf Vadovics (GDI), Edina Vadovics (GDI), Julia Backhaus (UM)

Reviewers: Gary Goggins (NUIG)

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ENERGISE partners	Logo
National University of Ireland, Galway (NUIG), University Road, Galway, Ireland	
Aalborg Universitet (AAU), Fredrik Bajers Vej 5, Aalborg 9220, Denmark	
Kingston University Higher Education Corporation (Kingston), River House High Street 53-57, Kingston Upon Thames KT1 1LQ, United Kingdom	
Universiteit Maastricht (UM), Minderbroedersberg 4-6, Maastricht 6200 MD, Netherlands	
Université de Genève (UNIGE), 24 rue du Général-Dufour, 1211 Genève 4, Switzerland	
GreenDependent Institute (GDI), Eva utca 4, Godollo 2100, Hungary	
Ludwig-Maximilians-Universitaet Muenchen (LMU Muenchen), Geschwister-Scholl-Platz 1, Muenchen 80539, Germany	
Focus Drustvo Za Sonaraven Razvoj (FOCUS), Maurerjeva Ulica 7, Ljubljana 1000, Slovenia	
Applied Research and Communications Fund (ARC Fund), Alexander Zhendov Street 5, Sofia 1113, Bulgaria	
Helsingin Yliopisto (UH), Yliopistonkatu 4, Helsingin Yliopisto 00014, Finland	

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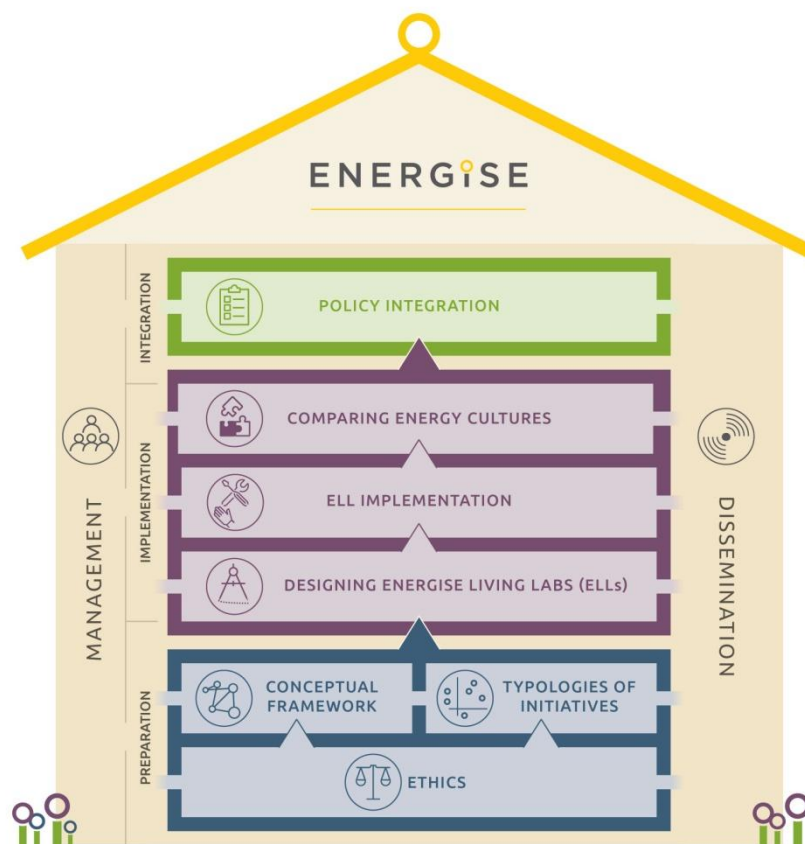
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ENERGISE PROJECT

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.

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.

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**

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

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
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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 address¹ 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>

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/1eCNnk3j6E39va8gHxpJ2h-mzFvwhzDeDKBbsnSUiN24/edit#gid=0>

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 **Password²**
- Welcome to editing your national website 😊

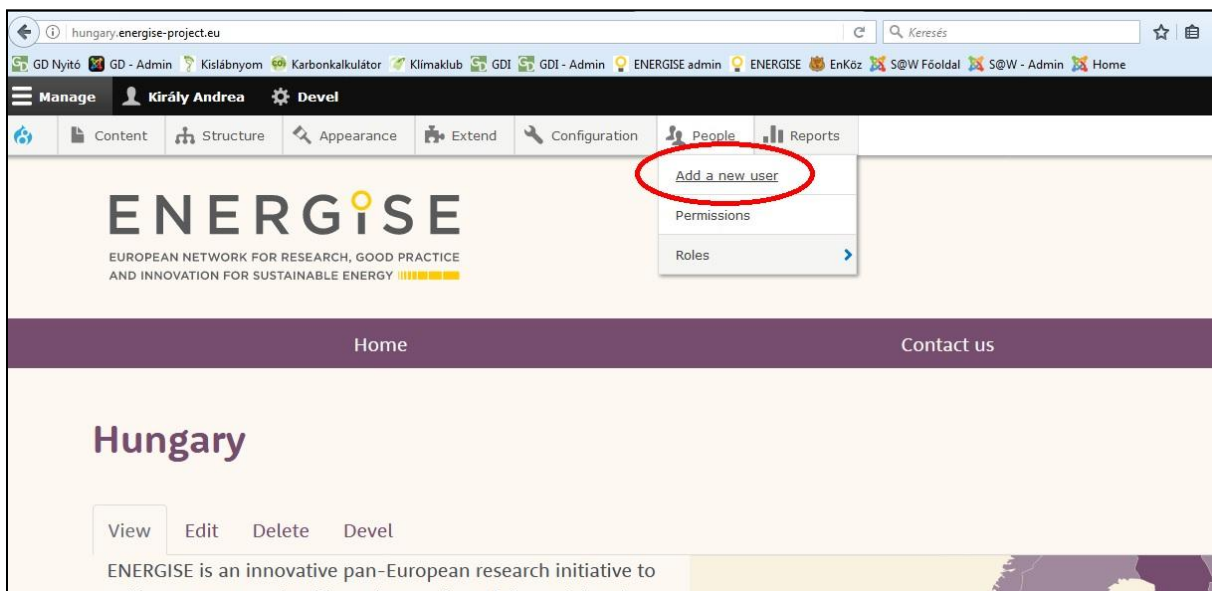
Once logged in, you can

- 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.

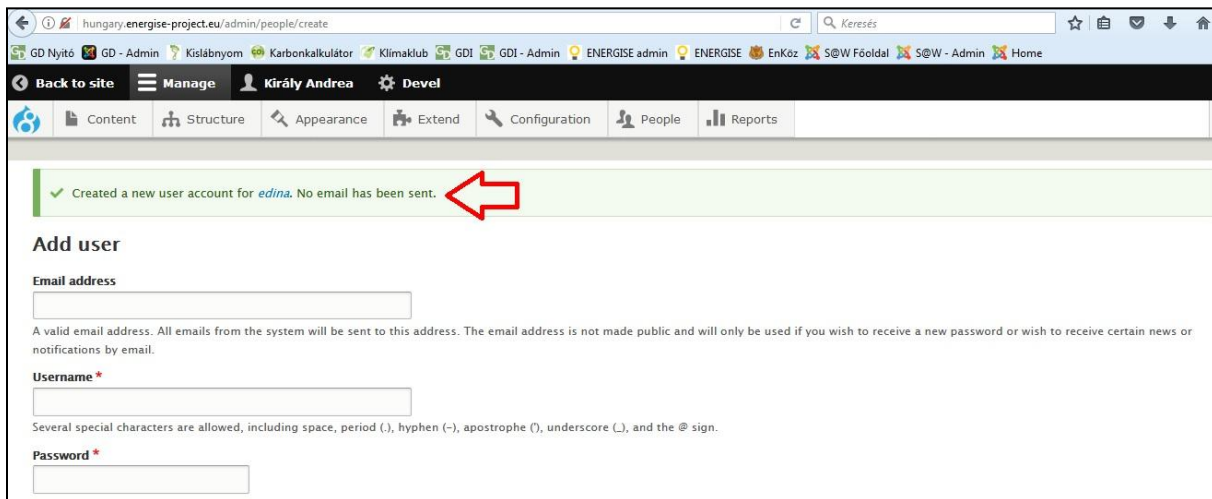
Fill in the required information (Email address, Username, Password, Confirm password)

Pay attention to the following settings at this page:

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

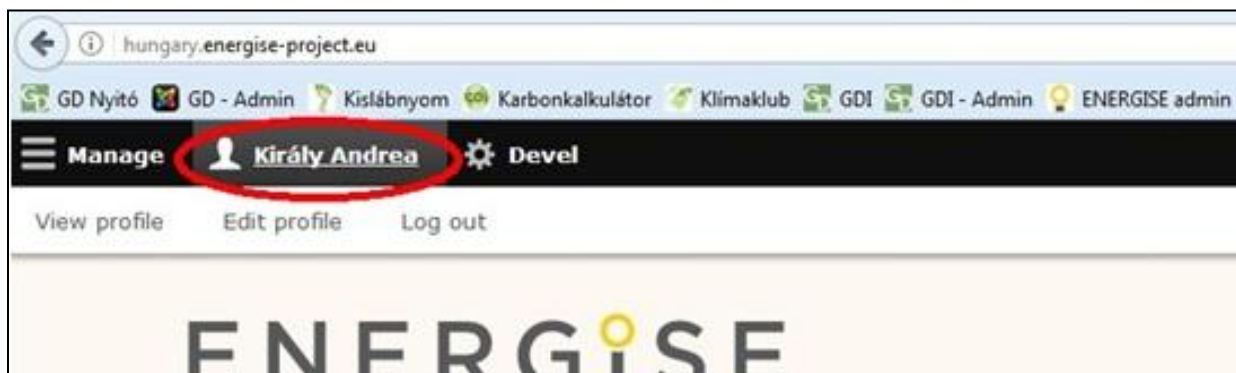
At the end, save the changes by clicking on 'Create new account' at the bottom of the page.

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.

hungary.energise-project.eu/user/3/edit

GD Nyitó GD - Admin Kislábnyom Karbonkalkulátor Klímaklub GDI GDI - Admin ENERGISE admin

Back to site Manage Király Andrea Devel

View profile **Edit profile** Log out

Király Andrea

View Edit Devel

Current password

Required if you want to change the *Email address* or *Password* below. [Reset your password.](#)

Email address *

andrea@greendependent.org

A valid email address. All emails from the system will be sent to this address. The email address is not made public and notifications are sent by email.

Username *

Király Andrea

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the

Password

Password strength:

Roles

Authenticated user

Administrator

CONTACT SETTINGS

Personal contact form

Allow other users to contact you via a personal contact form which keeps your email address hidden. You can choose to disable this feature.

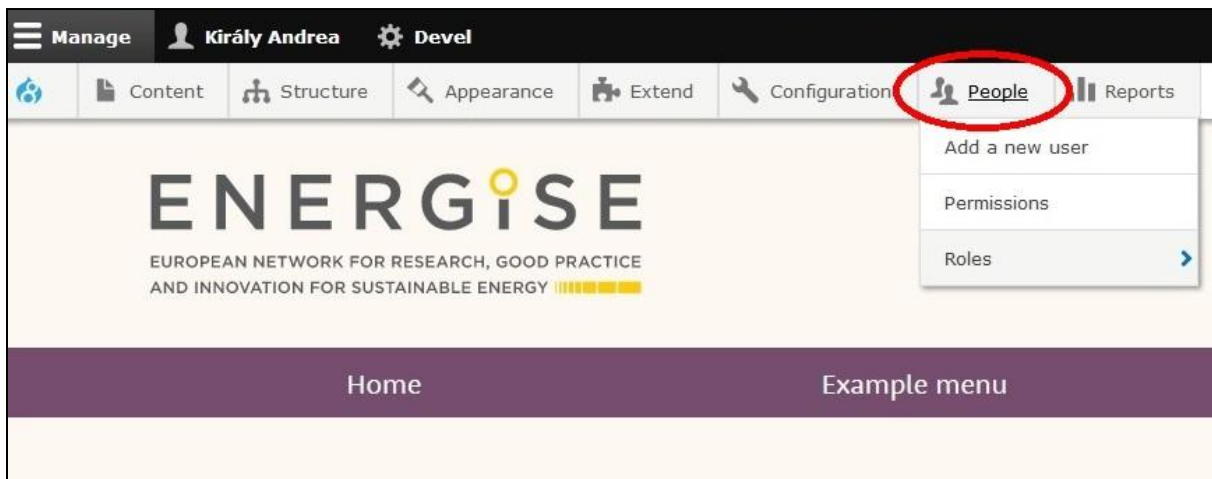
URL alias

Specify an alternative path by which this data can be accessed. For example, type "/about" when writing

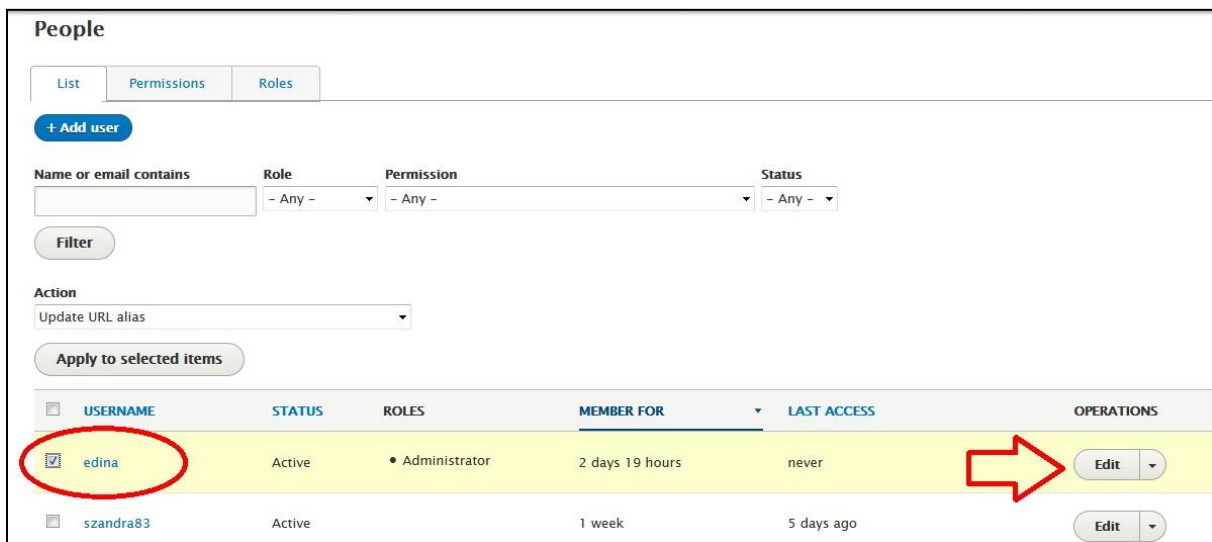
Save **Cancel account**

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).

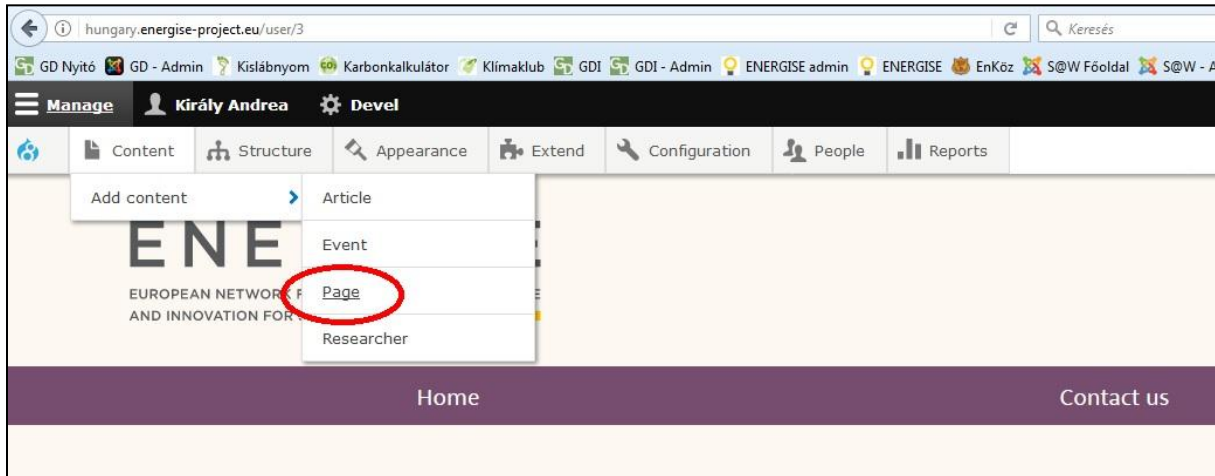


Please be careful with deleting users. Important Note: Please **DO NOT** delete user 'Vadovics Kristóf'!

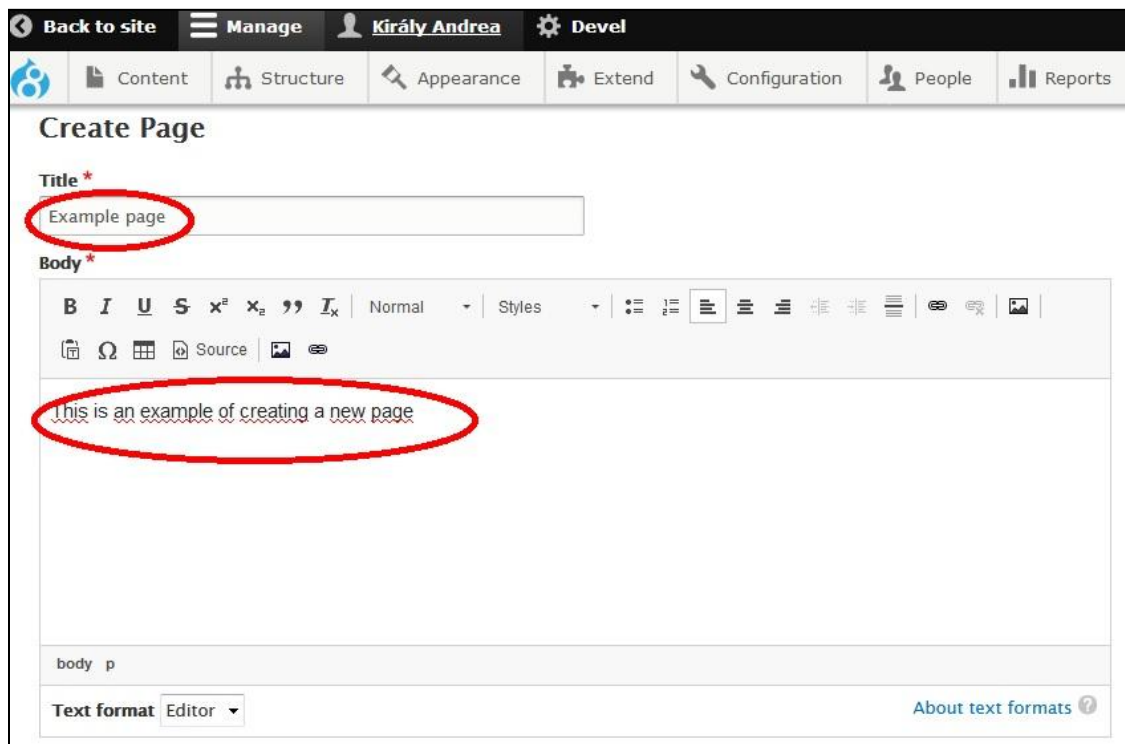
2.5. CREATING NEW PAGES:

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.

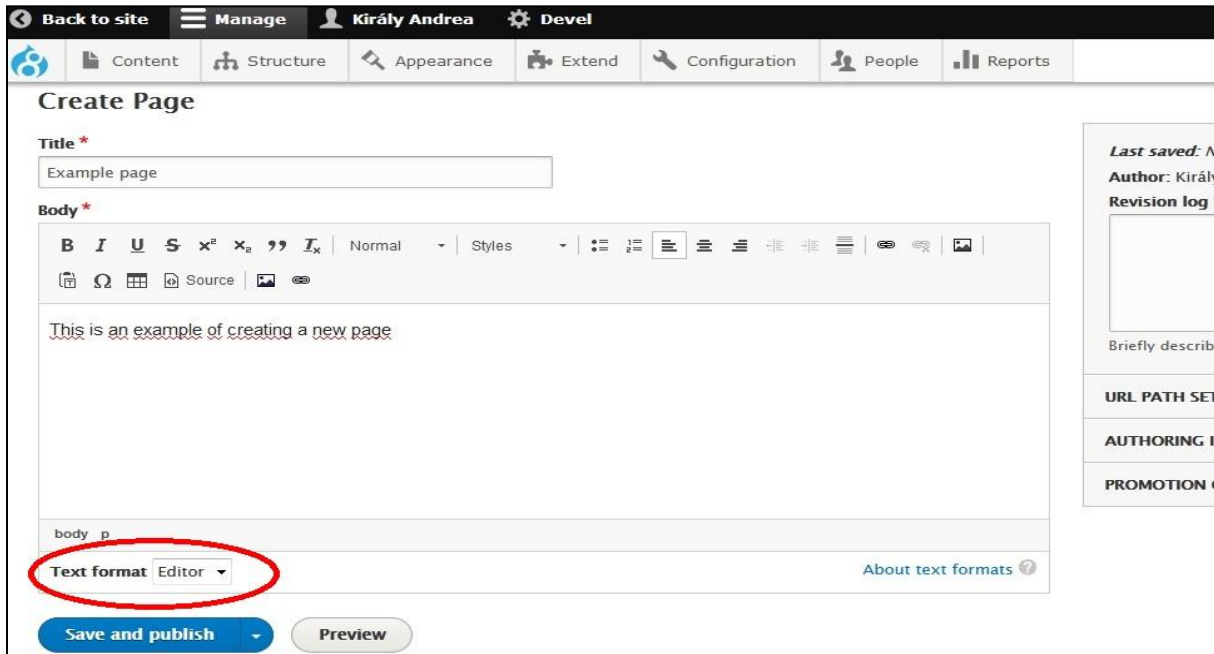
Go to the menu '**Content / Add content**'. Choose and click on the menu '**Page**'.



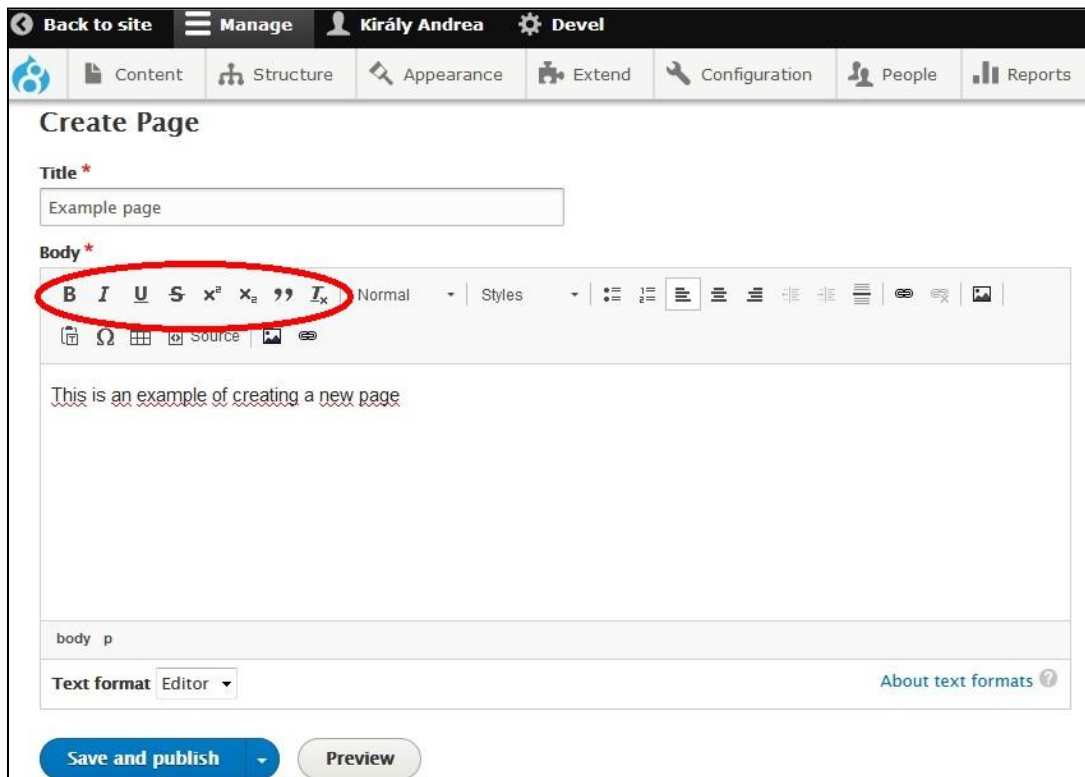
Here you can add a '**Title**' to the page (here: *Example page*), and add description in the box '**Body**' (here: *This is an example of creating a new page*).



Make sure 'Text format' under the box is set to 'Editor' (otherwise you won't be able to edit the text)



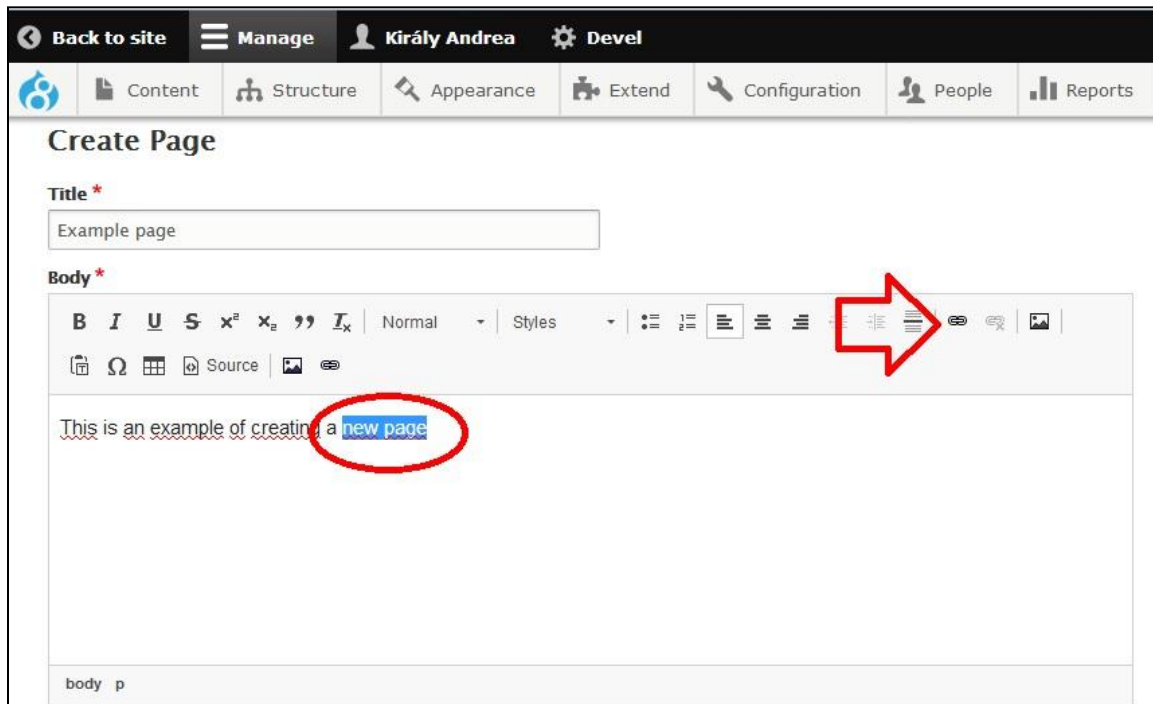
You can format your text by using font types (**bold**, *initial*, underlined, etc).



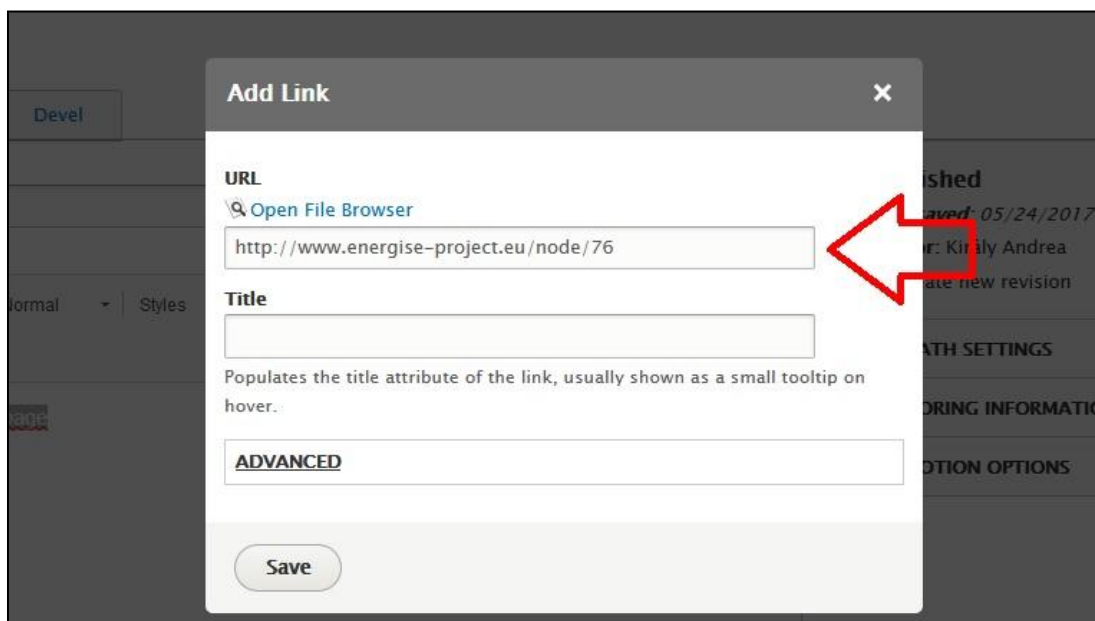
2.5.1. ADDING LINKS

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

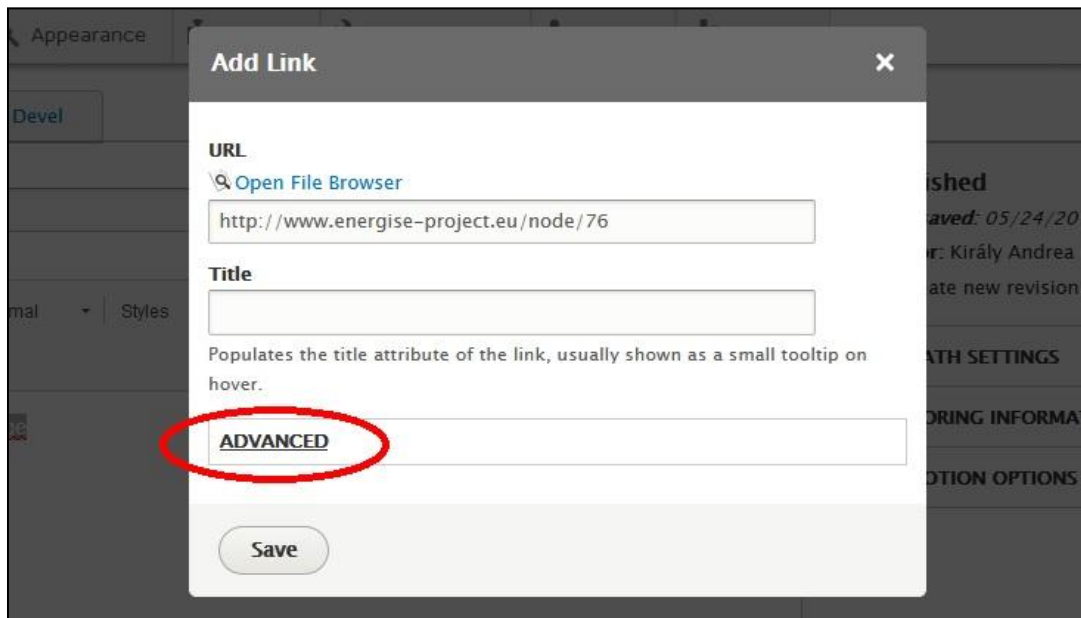
First click on the icon 'link', then mark the desired text part in the 'Body' (here: *new page*) to which you want to link a page.



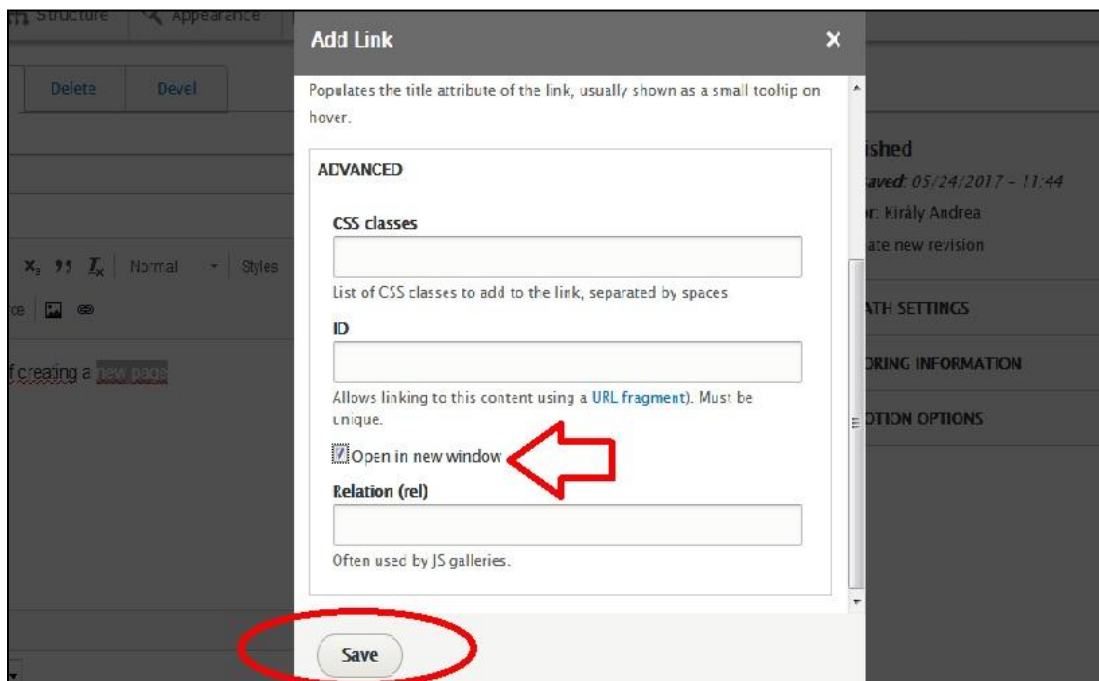
Copy and paste the desired link into the first line (URL).



It is recommended to set the link to open it in a new window. For this, click on the menu **Advanced**:

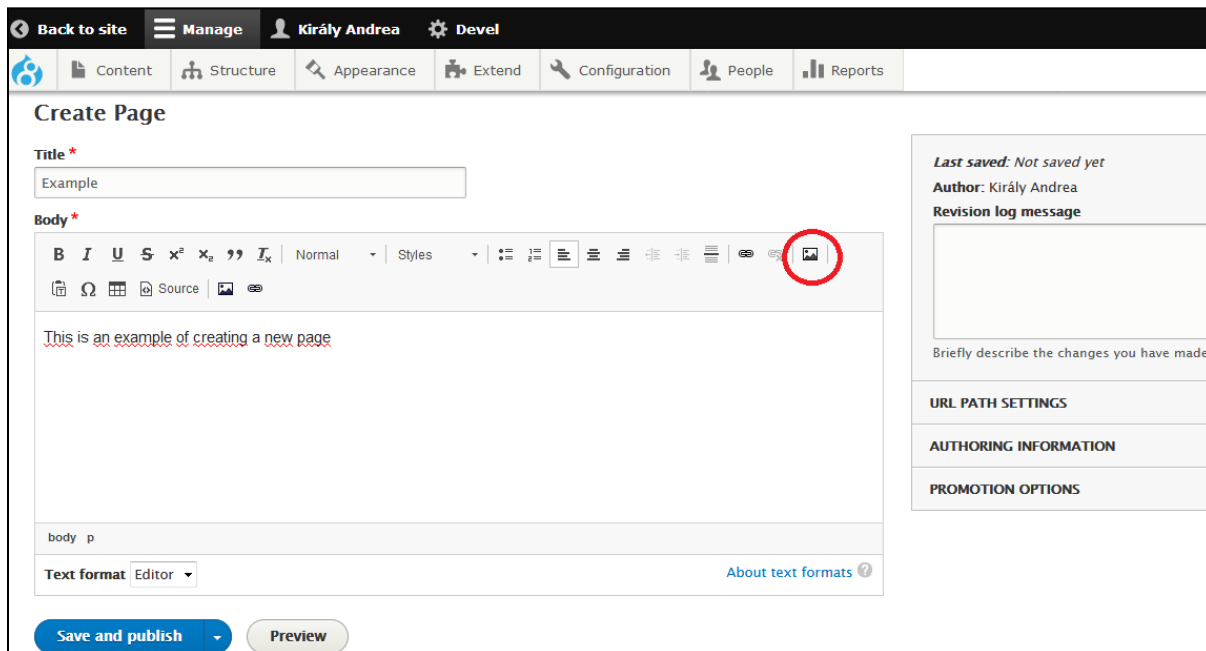


Tick the menu **Open in new window**, then save the changes at the bottom of the page:

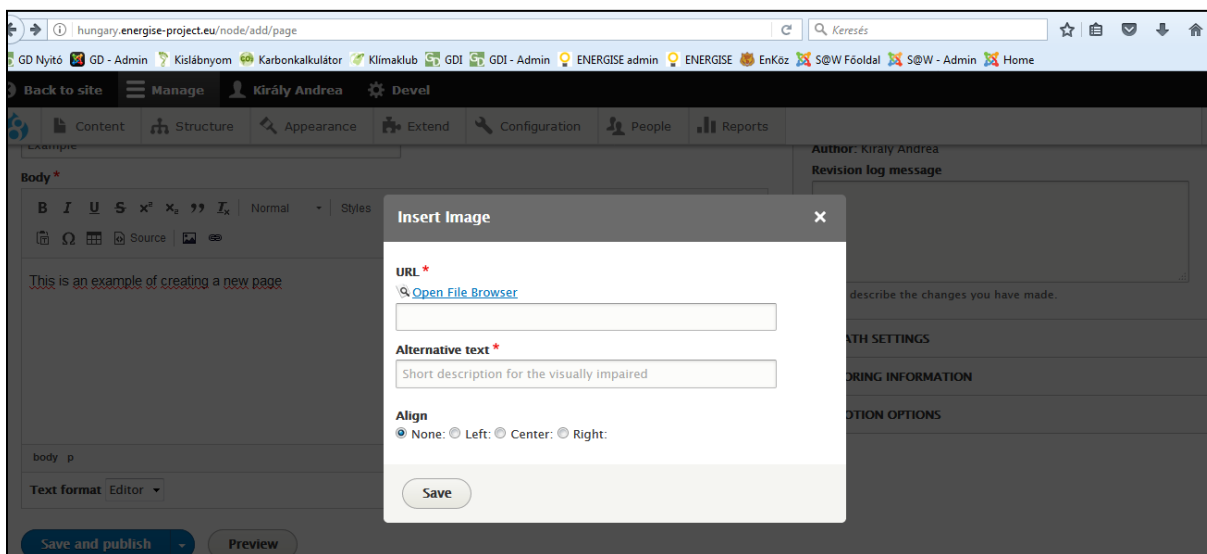


2.5.2. ADDING IMAGES TO THE TEXT:

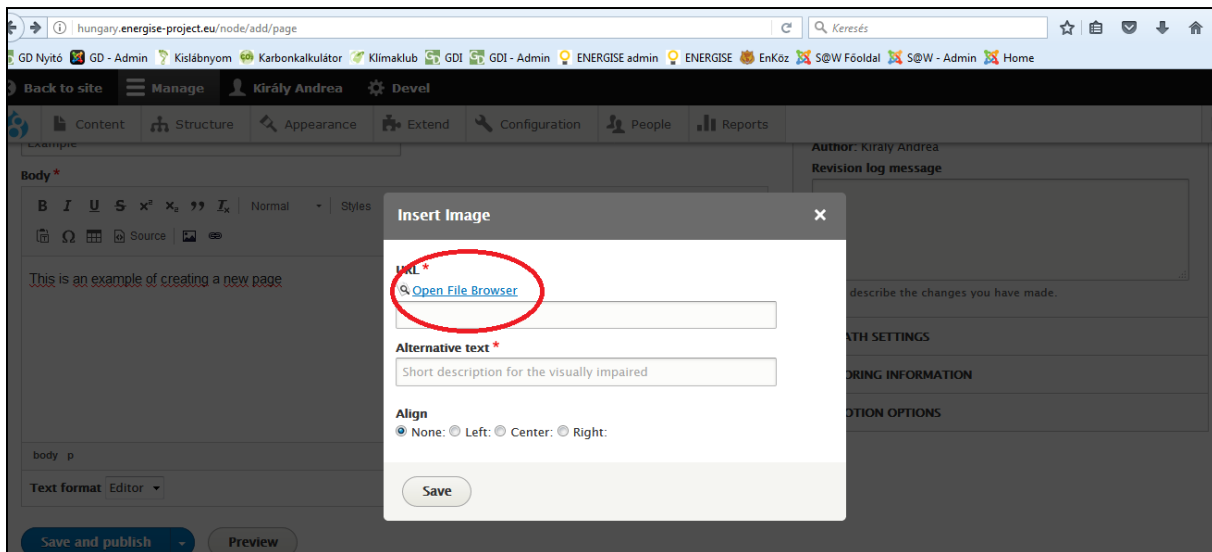
By the aid of the icon 'image' you can add images/photos/logos etc. to your text. Click on the icon in red circle as below:



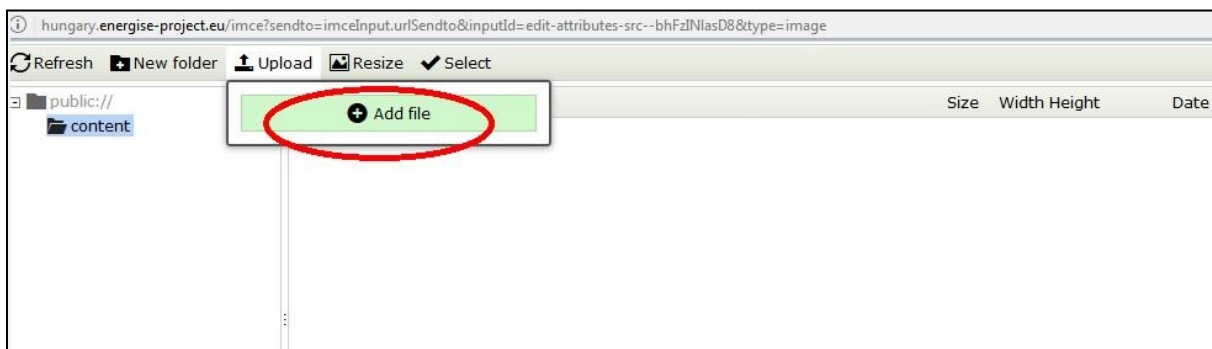
You will see the window below popping up. Here you can either upload a picture already stored in the database of the website, or you can upload a new picture from your computer.



Either way, first open the link **'Open File Browser'**:

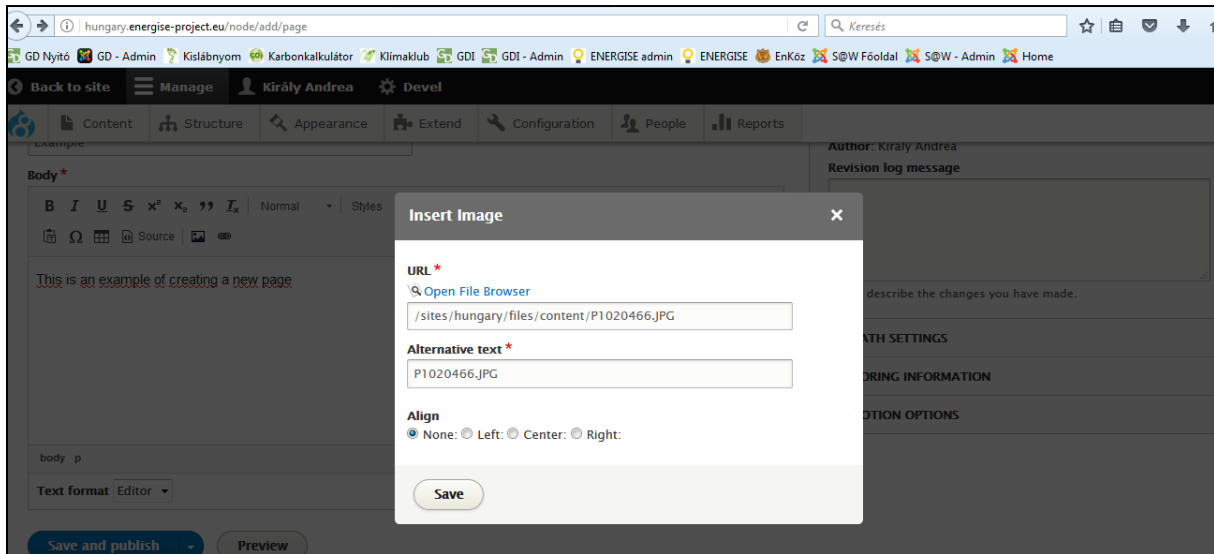


Here you can select **'Upload/add file'** (to upload a new photo³), or **'Select'** a photo among the existing ones.

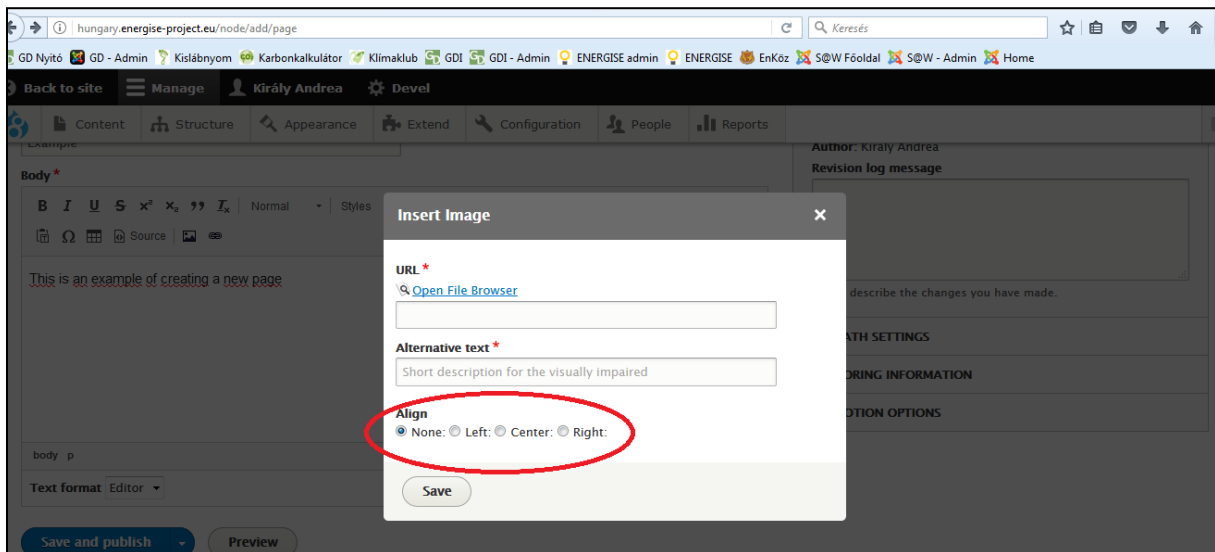


³ Before uploading new pictures make sure you have shrunk the picture's size to fit websites (max. 100-200 kByte). Do not use larger pictures as they may slow down your website and also load in very slowly.

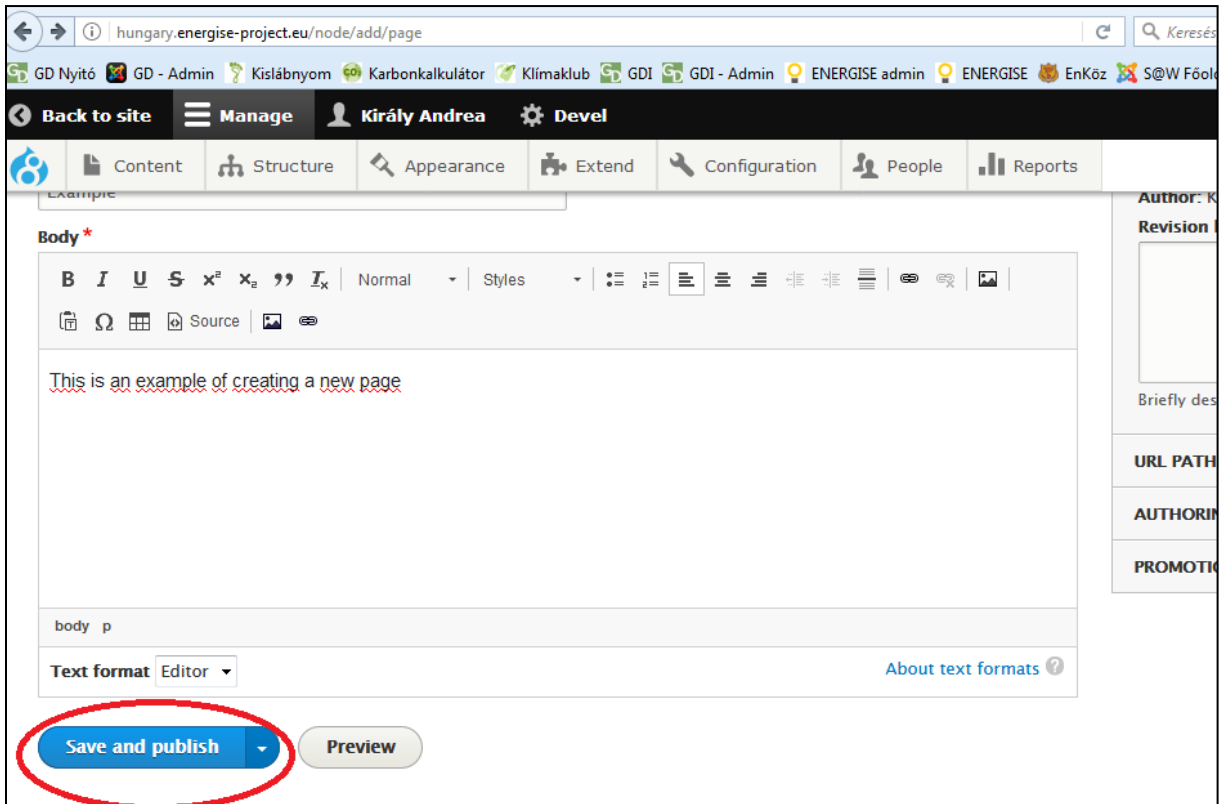
Once uploaded the file chosen, you will see its link.



Here you can also align your picture to 'None/Left/Center/Right' position.

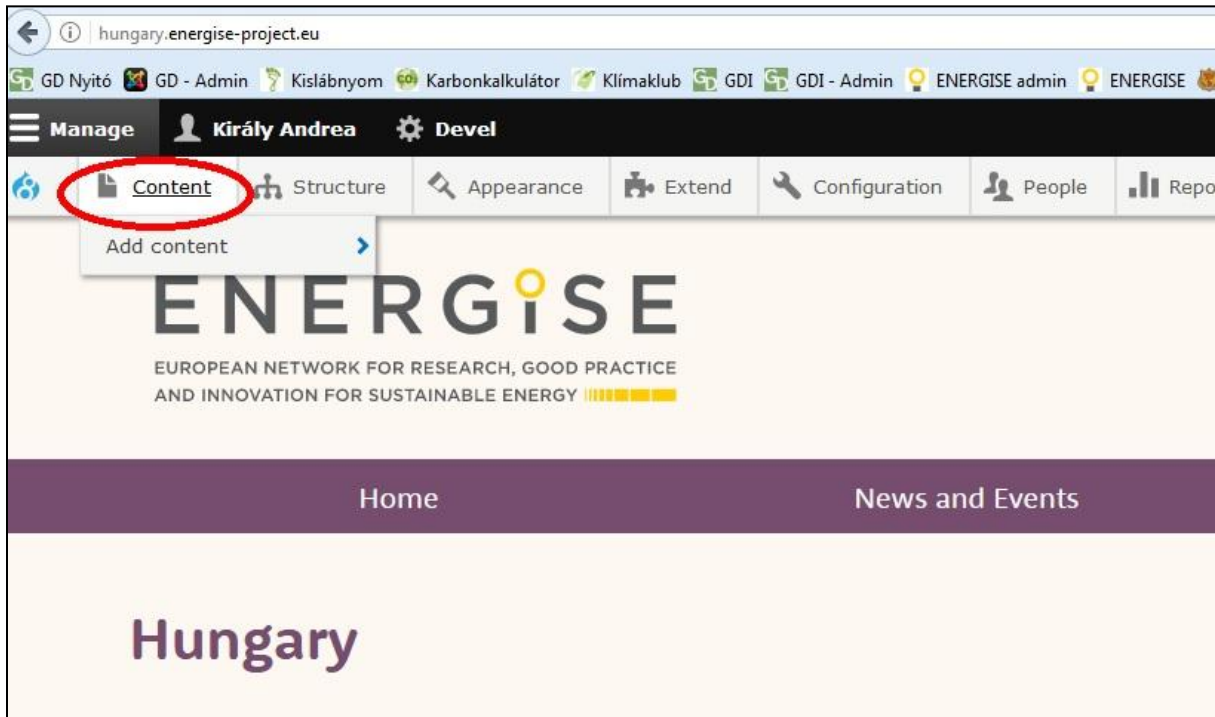


When finished editing, do not forget to click on '**Save and publish**' at the bottom.

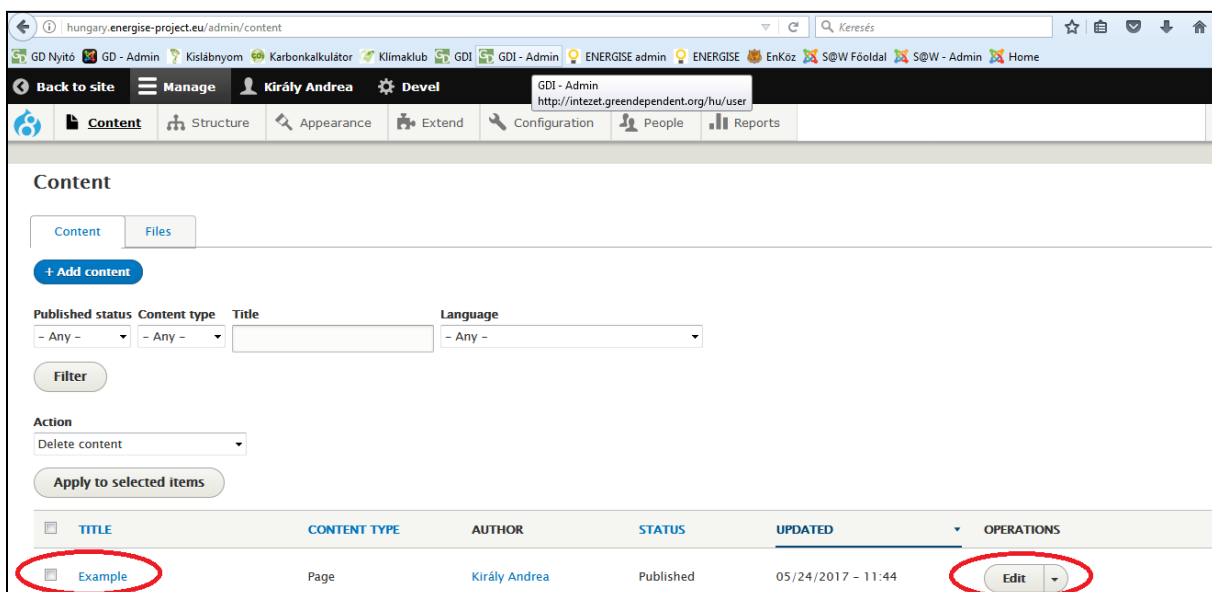


2.6. EDITING AN EXISTING PAGE

You can reach a page (here: the page called *Example page*) by clicking on '**Content**' (in red circle)

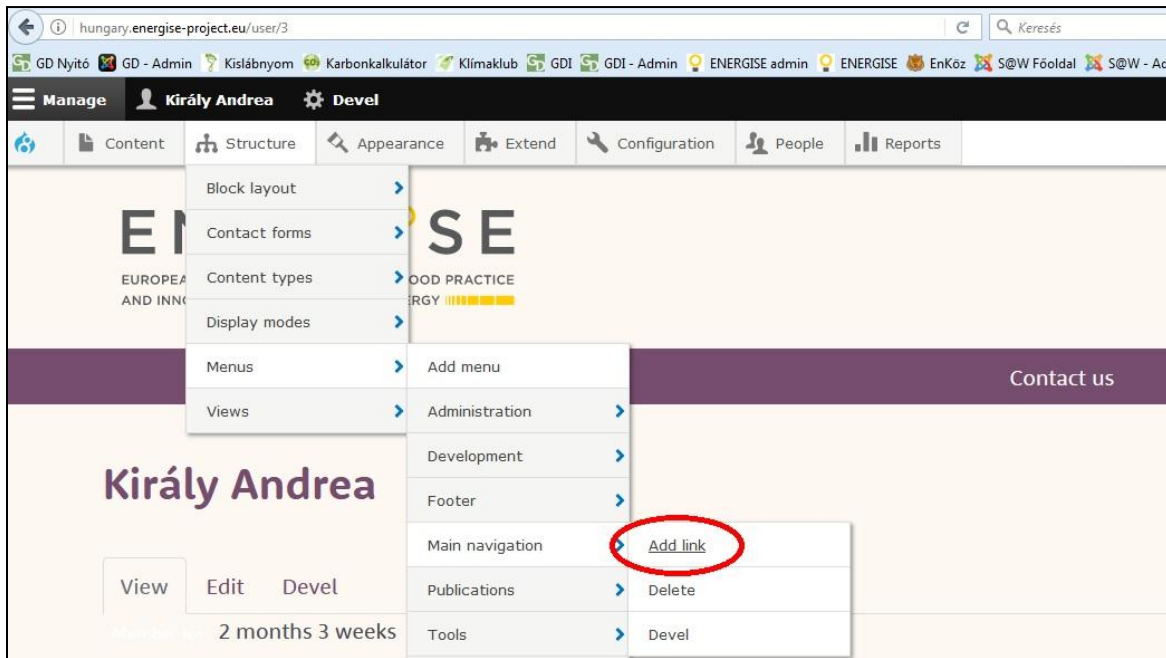


Here you can edit/delete page(s) created formerly (for these steps see '2.5. Creating new pages')



2.7. ADDING A NEW MENU ITEM

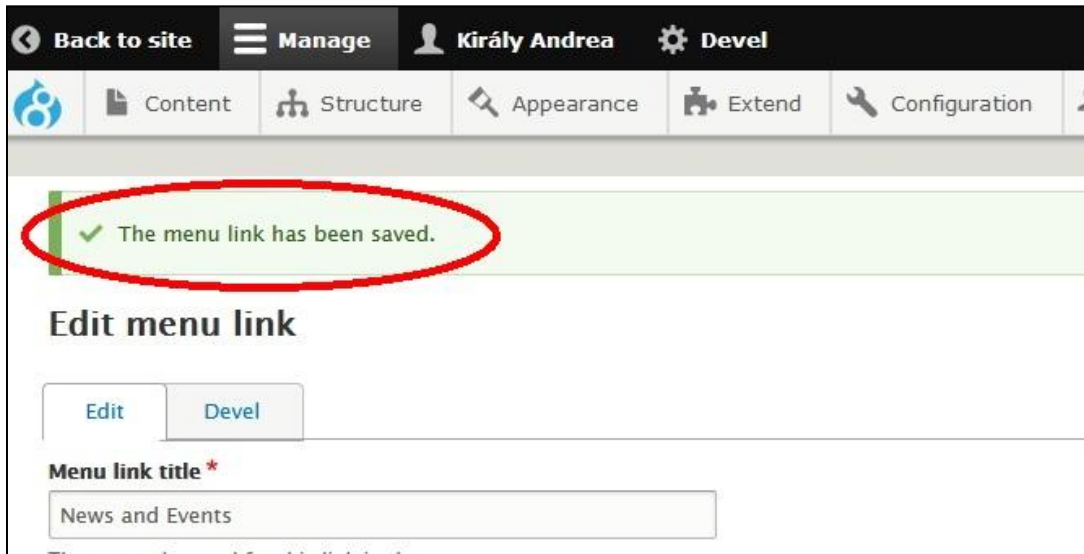
To add a new menu item choose Structure/Menus/Main navigation/Add link:



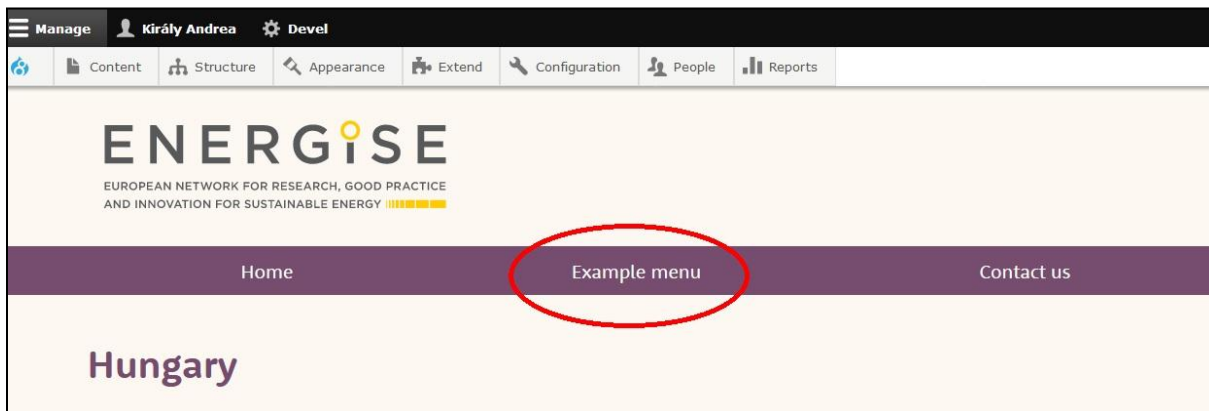
By clicking on 'Add link' you can give a 'Menu link title' (here: *Example menu*; this will be presented on the menu bar such as *Home/Contact us*), and you can add a 'Link' (which is basically the page you want to attach to the menu item). If you start typing the page's name in the text box of 'Link',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

 A screenshot of the 'Add menu link' form in the Drupal administration interface. The form is titled 'Add menu link' and has two main input fields: 'Menu link title *' and 'Link *'. The 'Menu link title' field contains the text 'Example menu'. The 'Link' field contains the text 'Example page (72)'. Below the 'Link' field, there is a checkbox for 'Enabled' which is checked. There is also a 'Description' field which is currently empty. The form is set against a light gray background with a white border.

After saving your changes you will get the following message: 'The menu link has been saved.'

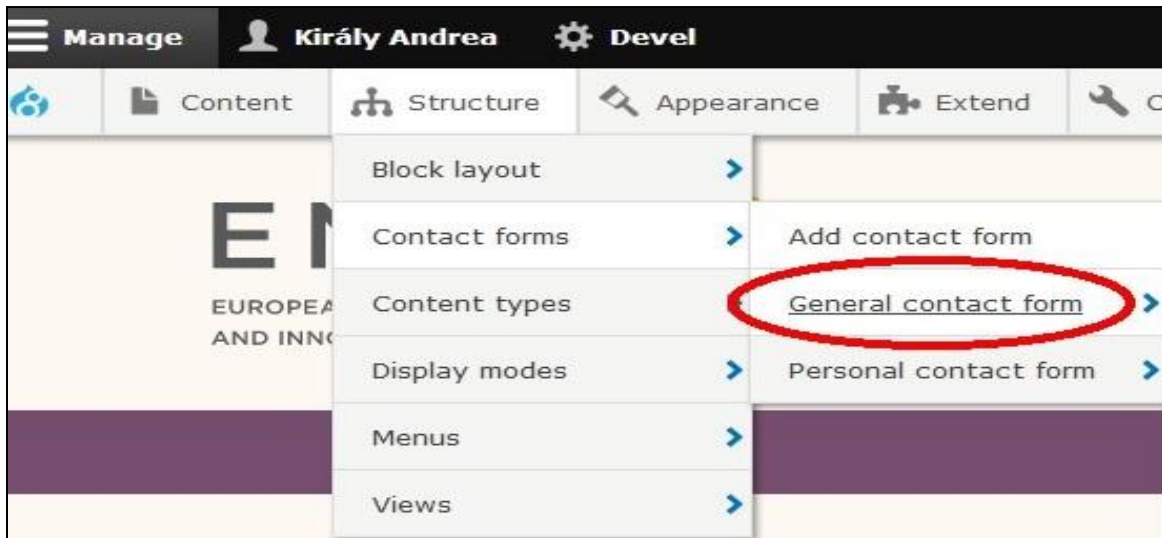


By going back to the site you can check whether the new menu has been added:

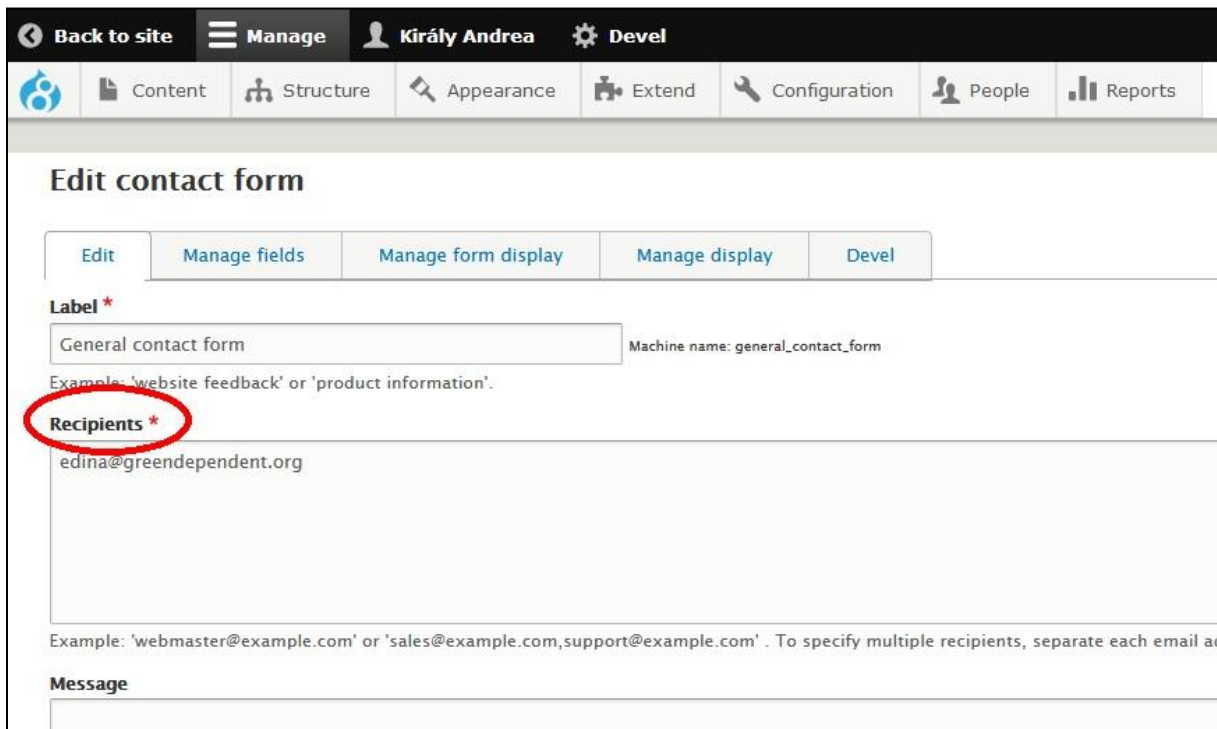


2.8. CHANGING THE CONTACT FORM:

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:

A screenshot of the 'Edit contact form' page in Drupal. The top navigation bar shows 'Back to site', 'Manage', 'Király Andrea', and 'Devel'. Below this, there are tabs for 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', and 'Reports'. The 'Structure' tab is active, and the 'Edit contact form' page is displayed. The page has a title 'Edit contact form' and several tabs: 'Edit', 'Manage fields', 'Manage form display', 'Manage display', and 'Devel'. The 'Edit' tab is selected. The 'Label' field is filled with 'General contact form' and has a machine name of 'general_contact_form'. Below this, there is a 'Recipients' field, which is circled in red. The 'Recipients' field contains the email address 'edina@greendependent.org'. Below the 'Recipients' field, there is a 'Message' field. The page also includes an example of how to specify multiple recipients: 'Example: 'webmaster@example.com' or 'sales@example.com,support@example.com' . To specify multiple recipients, separate each email address with a comma.'

ENERGISE

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

TRAINING ON NATIONAL WEBSITE MANAGEMENT WP7

Presentation by Kristóf Vadovics (GDI)

27TH JULY 2017



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 727642.

ENERGISE

gr²independent
Institute

CONTENT

#2

- Introduction to the central website
- Introduction to the national websites
 - Logging into the admin part of your national websites
 - Adding new users
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 - Changing the contact form
- Q&A



CENTRAL WEBSITE

- www.energise-project.eu
 - Managed by GDI



The screenshot shows the homepage of the ENERGISE website. The browser address bar displays "energise-project.eu". The website header features the "ENERGISE" logo with the tagline "EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY". A navigation menu includes "Home", "About the Project", "Partners", "News and Events" (highlighted in yellow), "Tender calls", "Resources", and "Contact us". The main content area is titled "What is ENERGISE?" and contains a paragraph describing the initiative, a map of Europe with several countries highlighted in red, and a link to "Read more about ENERGISE here".

energise-project.eu

GD - Adm GDI GDI - Adm Kisláb Karbonkalk Klímaklub Beallit S@W-hu Basecamp EN2-HU Energise EMDESK CIMU H2020 PADOR

ENERGISE

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

Home About the Project Partners **News and Events** Tender calls Resources Contact us

What is ENERGISE?

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.

By scrolling over the map and clicking on a highlighted country the ENERGISE activities can be followed in the specific partner country.

Read more about ENERGISE [here](#)

t.eu/news and events/project news

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>



NATIONAL WEBSITES - LOGGING INTO THE NATIONAL SITE

#5

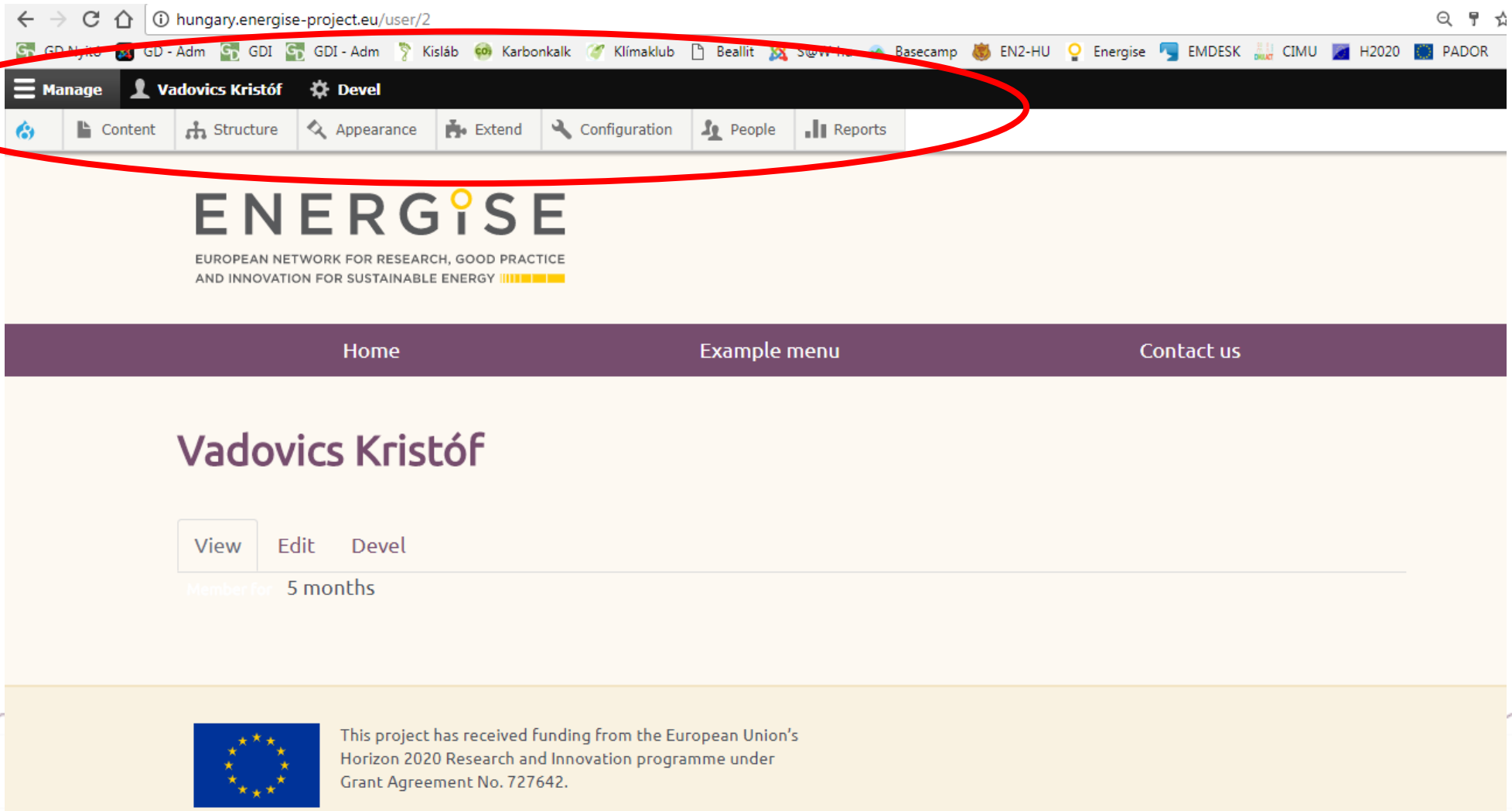
- Go to your relevant national link – either
 - Type in the domain
 - Click onto your country map in the central site
- Add to the link: **/user/login**
(<http://hungary.energise-project.eu/user/login>)
- Enter your **Username** or email address and your **Password**
– *sent to you by GDI earlier*
-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



NATIONAL WEBSITES – EDIT MODE

#6

◦ Welcome to editing your national website 😊



← → ↻ 🏠 hungary.energise-project.eu/user/2 🔍 📄 ⭐

GD Nyktó GD - Adm GDI GDI - Adm Kisláb Karbonkalk Klímaklub Beallit Storn... Basecamp EN2-HU Energise EMDESK CIMU H2020 PADOR

☰ **Manage** 👤 **Vadovics Kristóf** ⚙️ **Devel**

🔗 Content 🏗️ Structure 🔍 Appearance 🧩 Extend 🛠️ Configuration 👤 People 📊 Reports

ENERGISE


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Home Example menu Contact us

Vadovics Kristóf

View Edit Devel

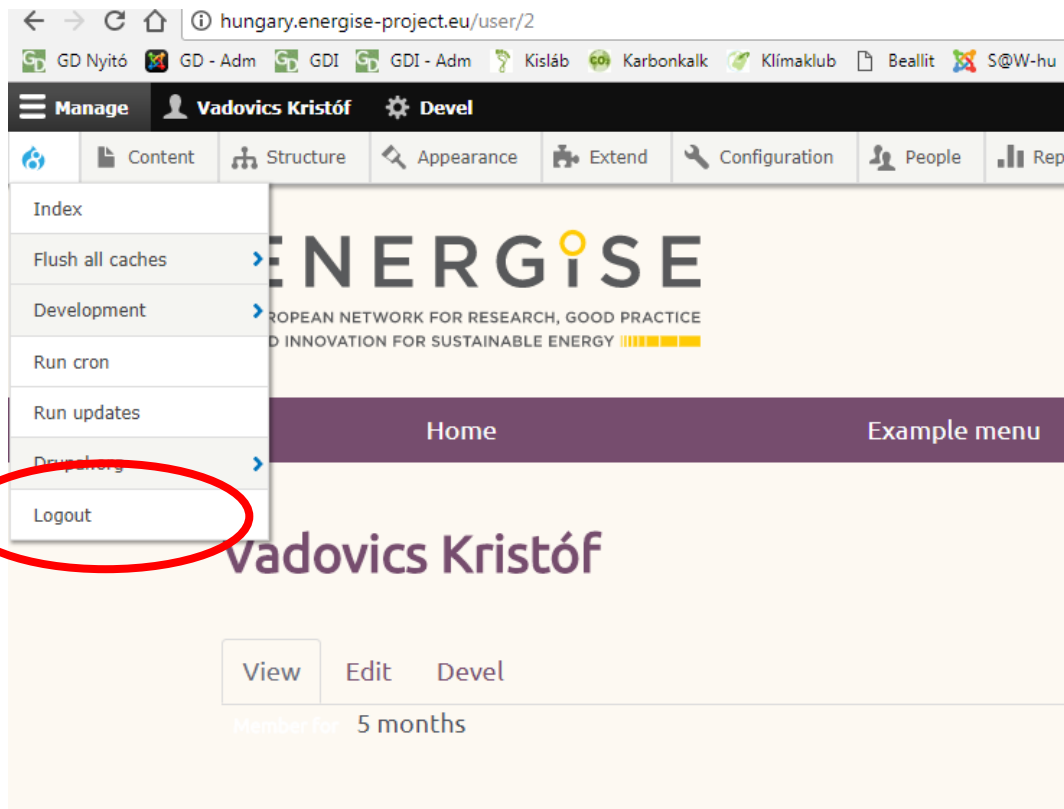
Member for 5 months



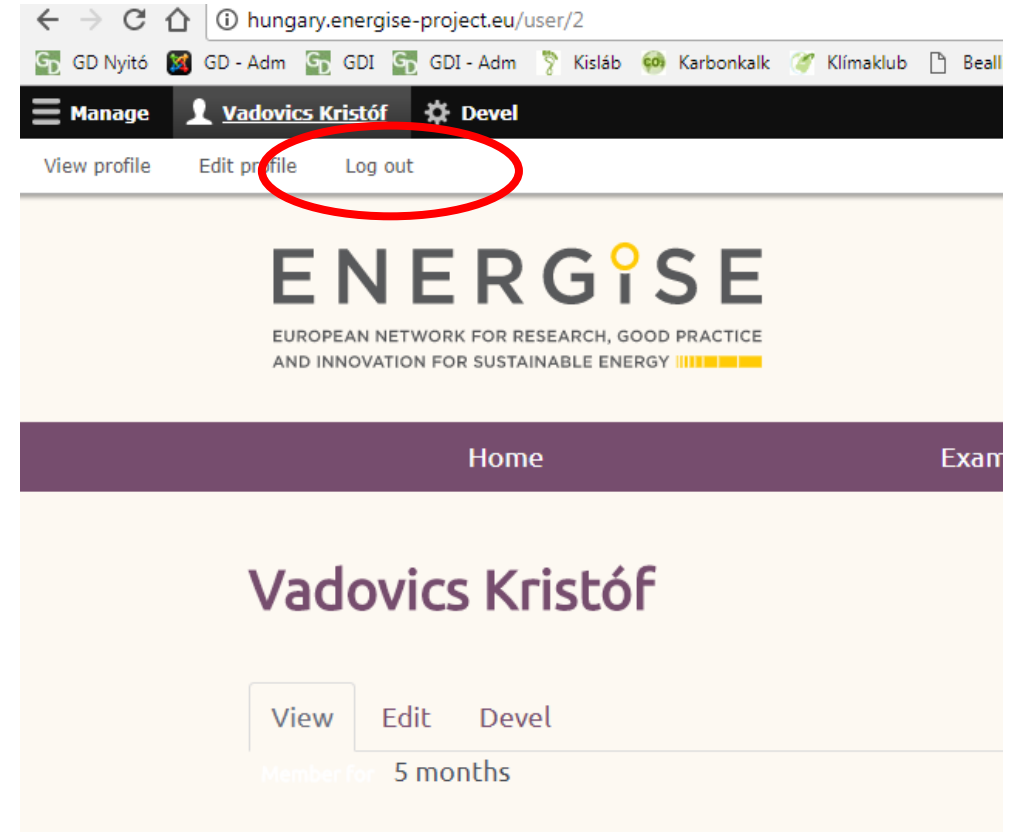
This project has received funding from the European Union's
Horizon 2020 Research and Innovation programme under
Grant Agreement No. 727642.

NATIONAL WEBSITES – LOGGING OUT

- There are two options



The screenshot shows the user profile page for Vadovics Kristóf. The browser address bar is `hungary.energise-project.eu/user/2`. The top navigation bar includes 'Manage', 'Vadovics Kristóf', and 'Devel'. Below this is a secondary navigation bar with 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', and 'Rep'. A dropdown menu is open on the left, listing various administrative actions. The 'Logout' option at the bottom of this menu is circled in red. The main content area displays the user's name 'Vadovics Kristóf' and 'Member for 5 months'.



The screenshot shows the same user profile page for Vadovics Kristóf. In this view, the 'Log out' link in the top navigation bar is circled in red. The rest of the page content, including the user name and membership duration, is identical to the previous screenshot.

NATIONAL WEBSITES – ADDING NEW USERS

#8

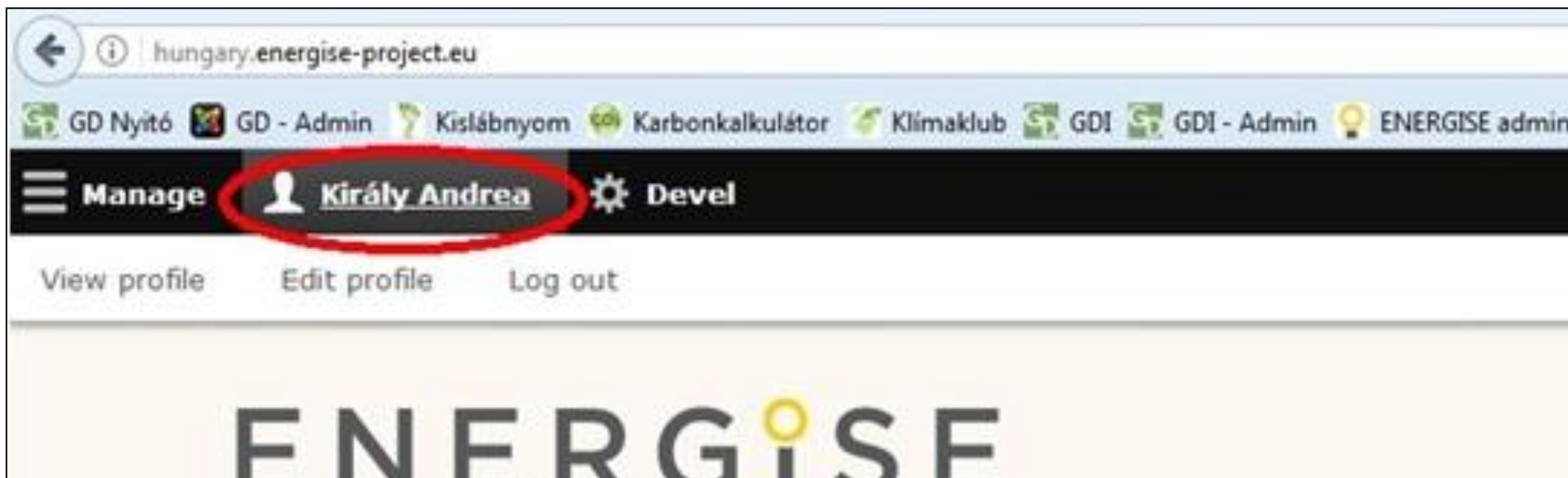
- Choose ‘People / Add a new user’ at the top of the page

The screenshot shows a web browser window with the URL `hungary.energise-project.eu`. The browser's address bar and search bar are visible. Below the browser, a navigation bar contains several tabs: 'Manage', 'Király Andrea', and 'Devel'. A secondary navigation bar includes icons for 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', and 'Reports'. The 'People' tab is active, and its dropdown menu is open, showing three options: 'Add a new user', 'Permissions', and 'Roles'. The 'Add a new user' option is circled in red. The main content area features the 'ENERGISE' logo and the text 'EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY'. Below the logo, there are two buttons: 'Home' and 'Contact us'. The page content is titled 'Hungary' and includes a 'View' button and a 'Devel' button. The text below the buttons reads: 'ENERGISE is an innovative pan-European research initiative to...'

NATIONAL WEBSITES – EDITING OWN ACCOUNT

#9

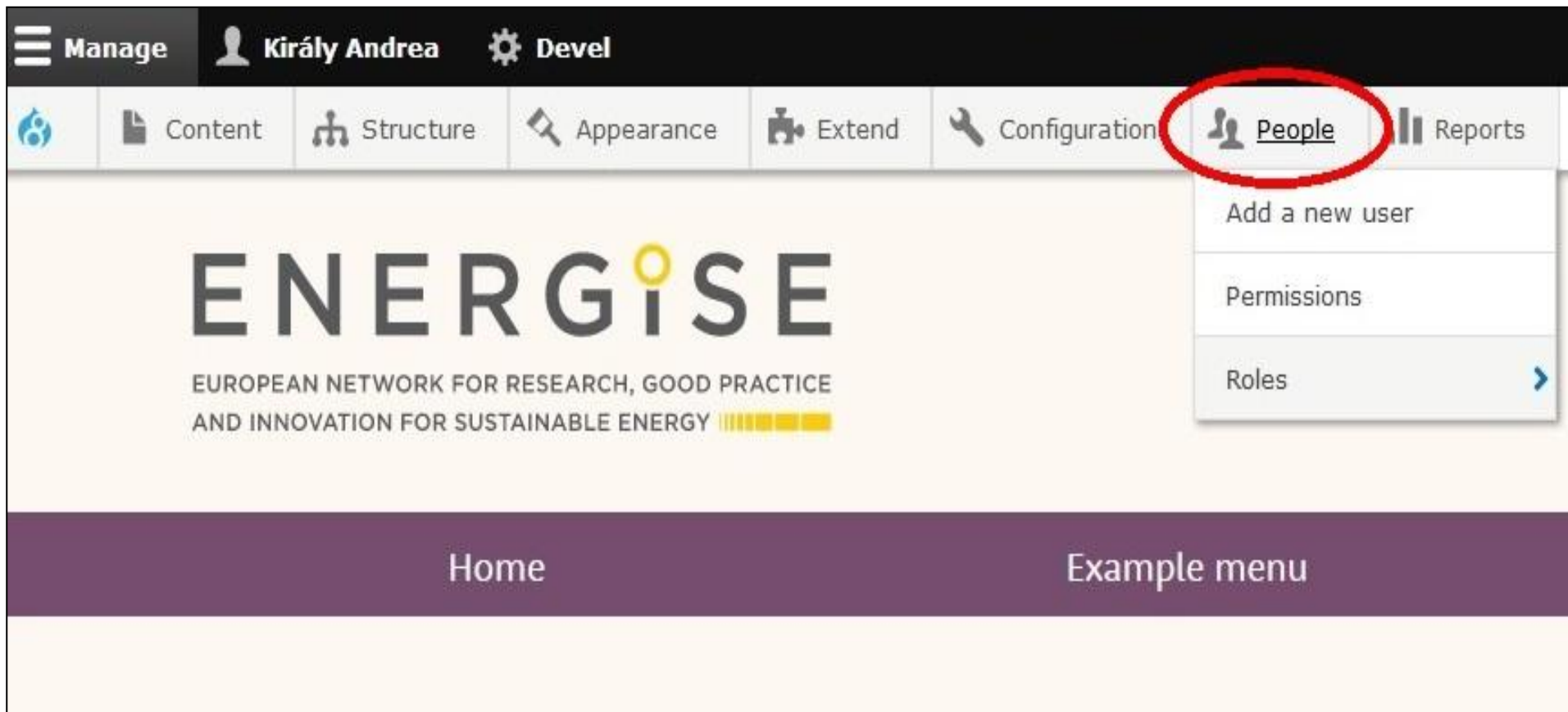
- Under '**Edit profile**' you can change your password, email address or username



NATIONAL WEBSITES – EDITING OTHER USERS’ ACCOUNT 1

#10

- If you want to edit another user’s account, click on **‘People’**



The screenshot displays the Drupal administration interface for the ENERGiSE website. The top navigation bar includes a 'Manage' menu, the user name 'Király Andrea', and the role 'Devel'. Below this, a secondary navigation bar contains icons and labels for 'Content', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', and 'Reports'. The 'People' menu item is highlighted with a red circle. A dropdown menu is visible below 'People', containing the options 'Add a new user', 'Permissions', and 'Roles' with a right-pointing arrow. The main content area features the ENERGiSE logo and the text 'EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY'. At the bottom of the page, there are two buttons labeled 'Home' and 'Example menu'.



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 727642.

ENERGiSE

NATIONAL WEBSITES – EDITING OTHER USERS’ ACCOUNT 2

- Pay attention to proper settings at ‘Status’ (Active) and ‘Roles’ (Administrator). **EDIT ACCOUNT**

People

List Permissions Roles

+ Add user

Name or email contains Role Permission Status

Filter

Action

Update URL alias

Apply to selected items

<input type="checkbox"/>	USERNAME	STATUS	ROLES	MEMBER FOR	LAST ACCESS	OPERATIONS
<input checked="" type="checkbox"/>	edina	Active	• Administrator	2 days 19 hours	never	Edit
<input type="checkbox"/>	szandra83	Active		1 week	5 days ago	Edit

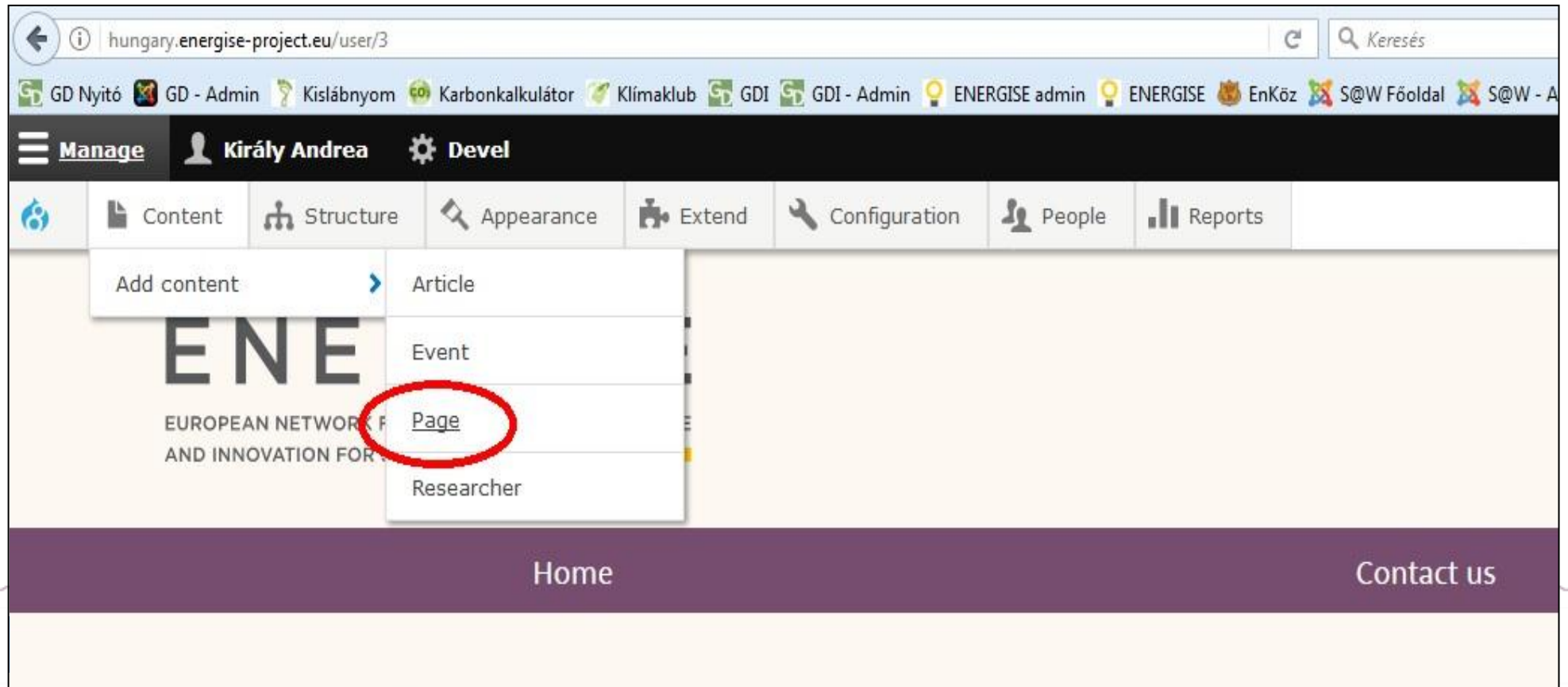
° Please **DO NOT** delete user 'Vadovics Kristóf'!



NATIONAL WEBSITES – CREATING NEW PAGES

#13

- Go to the menu 'Content / Add content'. Choose and click on the menu 'Page'
- **CREATE PAGE**



NATIONAL WEBSITES – EDITING AN EXISTING PAGE

#14

- click on **Content** **EDIT HOME PAGE (subscribe link)**

The screenshot shows the Drupal administration interface for the website hungary.energise-project.eu. The browser address bar displays the URL. The top navigation bar includes a 'Manage' menu, the user name 'Király Andrea', and a 'Devel' gear icon. Below this, a secondary navigation bar contains several menu items: 'Content' (circled in red), 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', and 'Reports'. A dropdown menu for 'Content' is visible, showing 'Add content' with a right-pointing arrow. The main content area features the 'ENERGISE' logo, with the tagline 'EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY' and a yellow progress bar. Below the logo, there are two navigation links: 'Home' and 'News and Events'. At the bottom of the page, the word 'Hungary' is displayed in a large, dark purple font.

NATIONAL WEBSITES – ADDING A NEW MENU ITEM

#15

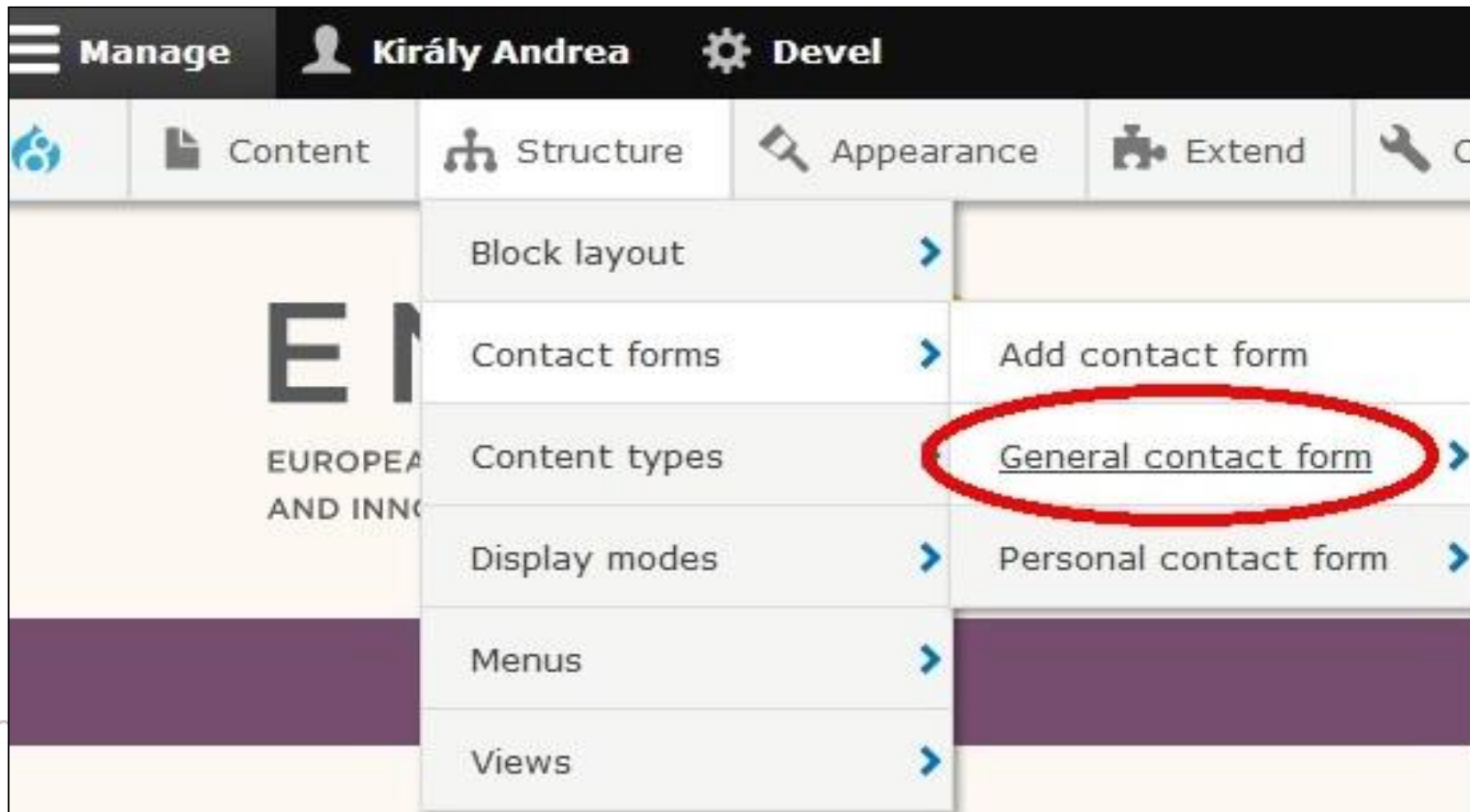
- To add a new menu item choose Structure/Menus/Main navigation/Add link **ADD NEW MENU**

The screenshot shows the Drupal administration interface for the 'hungary.energise-project.eu/user/3' user. The user is logged in as 'Király Andrea' with the role 'Devel'. The 'Structure' menu is open, showing options like 'Block layout', 'Contact forms', 'Content types', 'Display modes', 'Menus', and 'Views'. The 'Menus' menu is further expanded to show 'Add menu', 'Administration', 'Development', 'Footer', 'Main navigation', 'Publications', and 'Tools'. The 'Main navigation' menu is selected, and the 'Add link' option is highlighted with a red circle. The 'Add link' option is also highlighted with a red circle in the original image. The 'Add link' option is located in the 'Main navigation' menu, which is currently empty. The 'Add link' option is located in the 'Main navigation' menu, which is currently empty. The 'Add link' option is located in the 'Main navigation' menu, which is currently empty.

NATIONAL WEBSITES – CHANGING THE CONTACT FORM

#16

- Choose Structure / Contact forms / General contact form



◦ Questions?



ENERGISE

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THANK YOU FOR YOUR ATTENTION

GREENDEPENDENT INSTITUTE

Tel.: +36-20-512-1886 **Email:** kristof@greedependent.org



This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 727642.

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.

Final draft – 29 June 2018

Written by Martijn Senden (Betawerk)

Reviewed by Julia Backhaus (Maastricht University)

- 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.

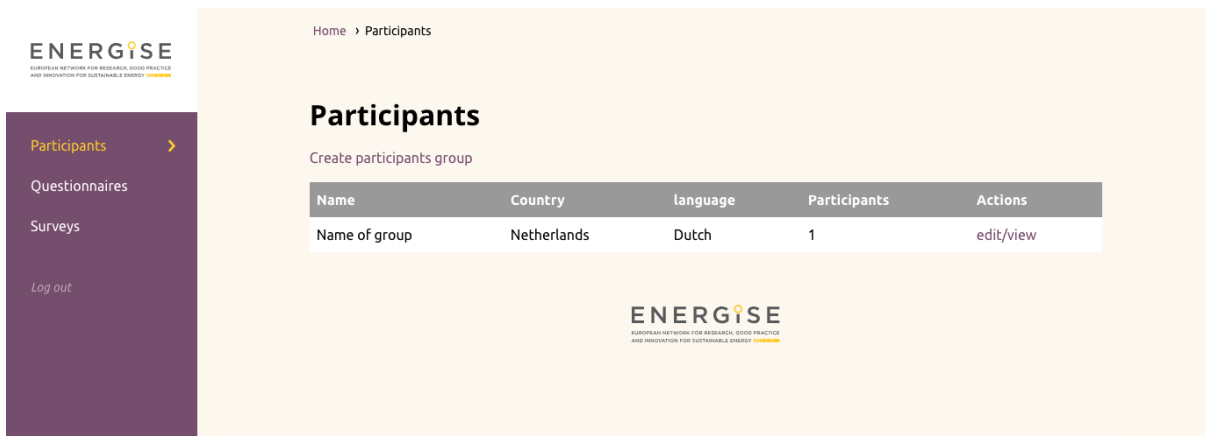
[Log in](#)

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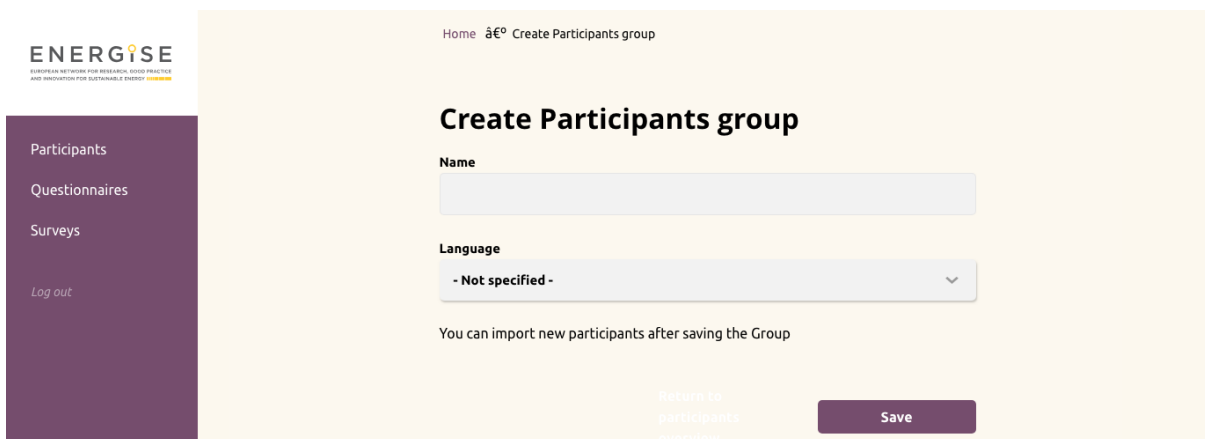
Create participant group

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.

The screenshot shows the ENERGISE web application interface. On the left is a dark purple sidebar with navigation links: 'Participants', 'Questionnaires', 'Surveys', and 'Log out'. The main content area is light yellow and displays a green success message at the top: 'Created the Testgroup Monitoring.' Below this is the 'Testgroup' title and two buttons: 'Edit' and 'Delete'. The form fields are as follows:

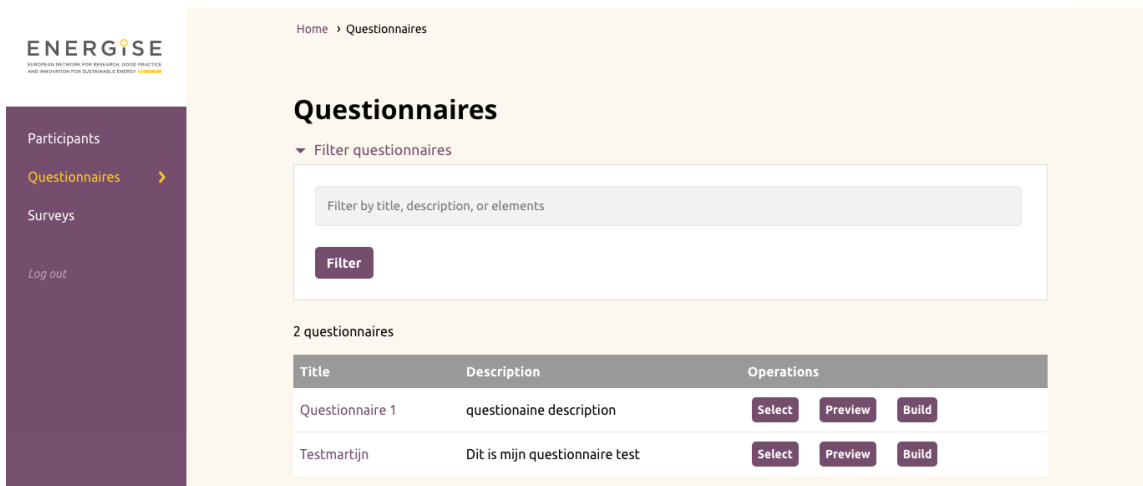
- Name:** Testgroup
- Country:** Netherlands
- Language:** Dutch

Below the form, there is a link 'Add new participant' and an 'Import participants' section with a button 'Bestand kiezen' and the text 'Geen bestand gekozen'. At the bottom, there is a link 'Return to participants overview' and two buttons: 'Save' and 'Delete'.

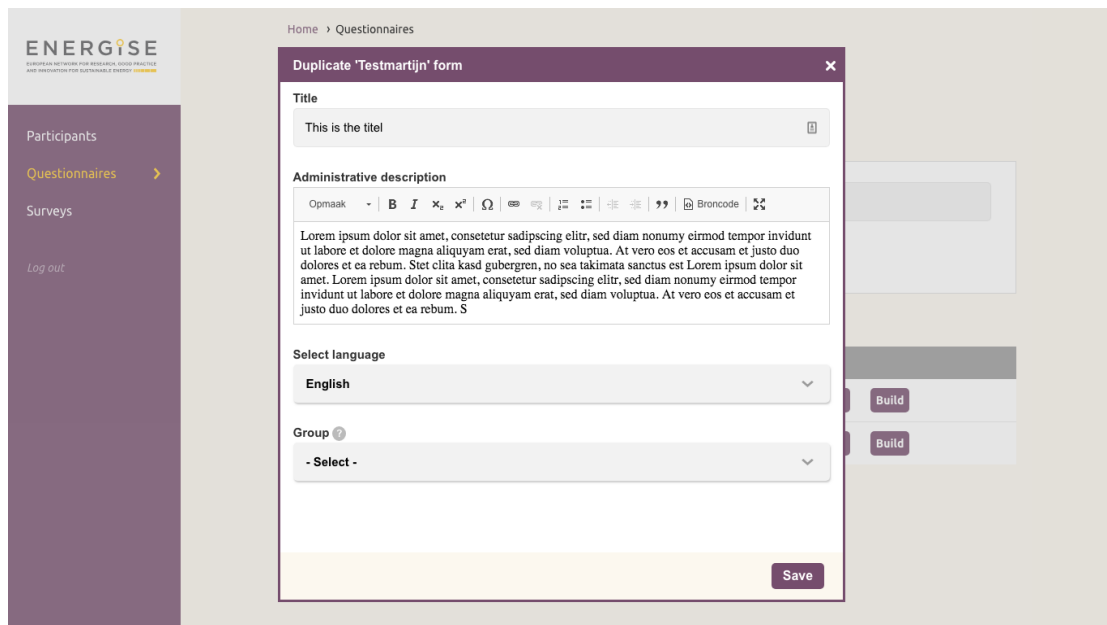
Choose Questionnaire template

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 be 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.

The screenshot shows the ENERGISe webform editor interface. On the left is a dark purple sidebar with the ENERGISe logo and navigation links: Participants, Questionnaires, Surveys, and Log out. The main content area is light yellow and shows the 'Test questionnaire' editor. At the top, there's a green success message: 'Webform Test questionnaire created.' Below that, the title 'Test questionnaire' is displayed with 'Add element' and 'Add page' buttons. There are four tabs: View, Build (active), Campaign, and Settings. An orange warning message states: 'You are editing the original Dutch language for this webform.' Below this is a table of elements:

Title	Key	Type	Required	Operations
Stap 1	stap_1	Wizard page		Edit
Dit is vraag 1	dit_is_vraag_1	Textarea	<input checked="" type="checkbox"/>	Edit
Dit is vraag 2	dit_is_vraag_2	Checkboxes other	<input checked="" type="checkbox"/>	Edit
Submit button(s)	actions	Submit button(s)		

At the bottom right, there are 'Save elements' and 'Reset' buttons.

- 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!

The screenshot displays the ENERGISe questionnaire builder interface. On the left, a sidebar contains navigation options: 'Participants', 'Questionnaires', 'Surveys', and 'Log out'. The main content area is titled 'Test questionnaire' and includes tabs for 'View', 'Build', 'Campaign', and 'Settings'. A warning banner indicates that the user is editing the original Dutch language. Below this, a table lists the questionnaire elements:

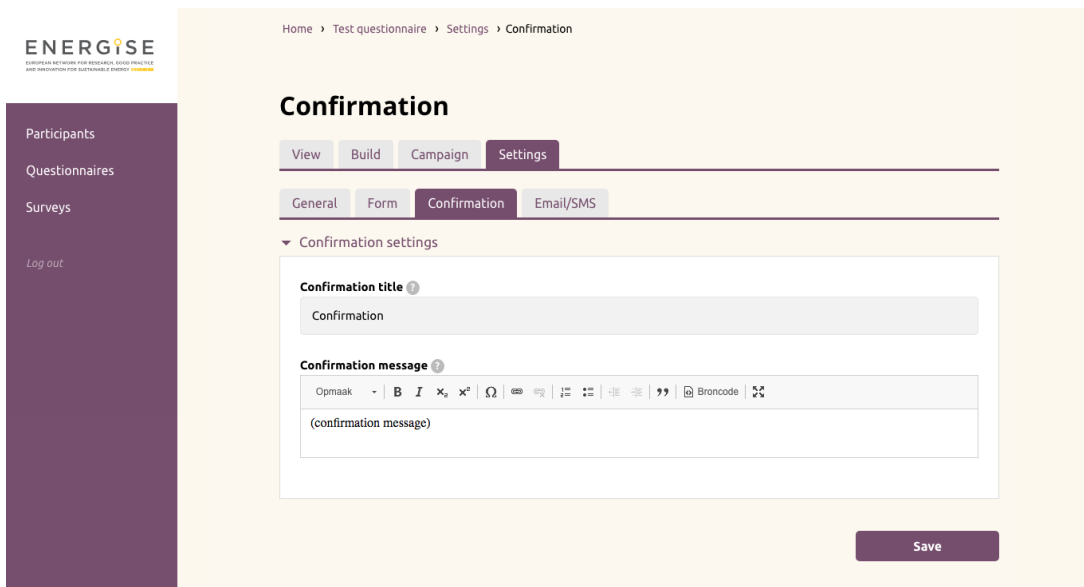
Title	Key
Stap 1	stap_1
Dit is vraag 1	dit_is_vraag_1
Dit is vraag 2	dit_is_vraag_2

The right-hand panel, titled 'Edit Dit is vraag 1 element', provides configuration options for the selected question:

- Element settings:** Type Textarea, Title (Question 1), Key: dit_is_vraag_1.
- Element description/help:** Help text (Opmaak, Broncode), Description (Opmaak, Broncode).
- Form validation:** Required (checked), Required message (Required?).

Buttons for 'Save' and 'Delete' are located at the bottom of the right-hand panel.

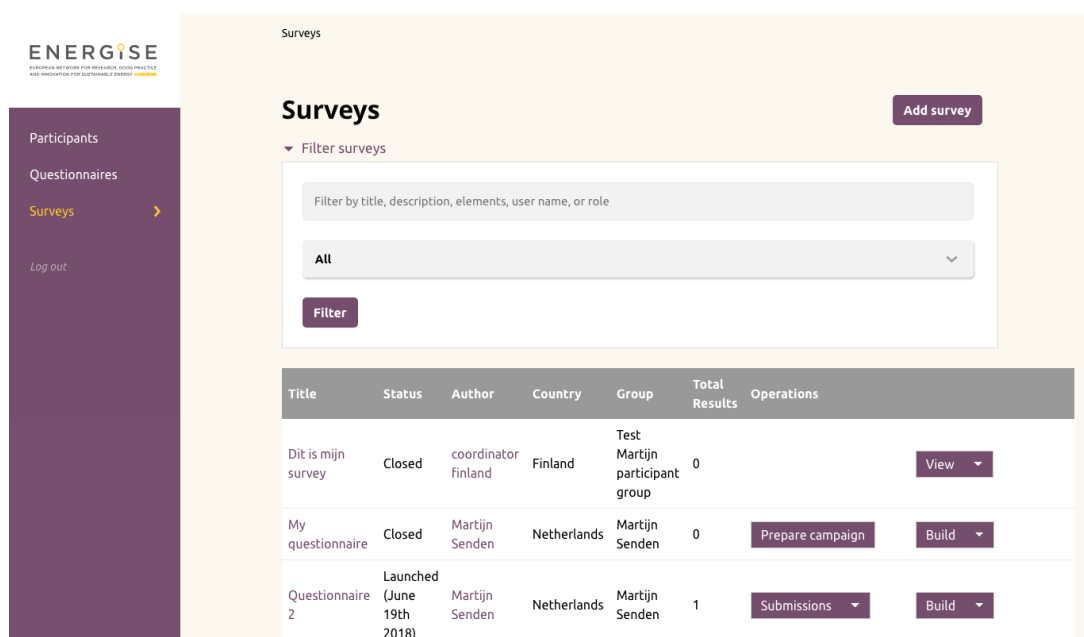
- Once all form elements are translated and checked using the 'View' mode to preview the survey, go to the tab 'Settings'. go to the tab **'Settings'**.
- On the settings tab you have the following sub-tabs available:
 - **'General'**: Adjust name, description, language, group selection.
 - **'Form'**: 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



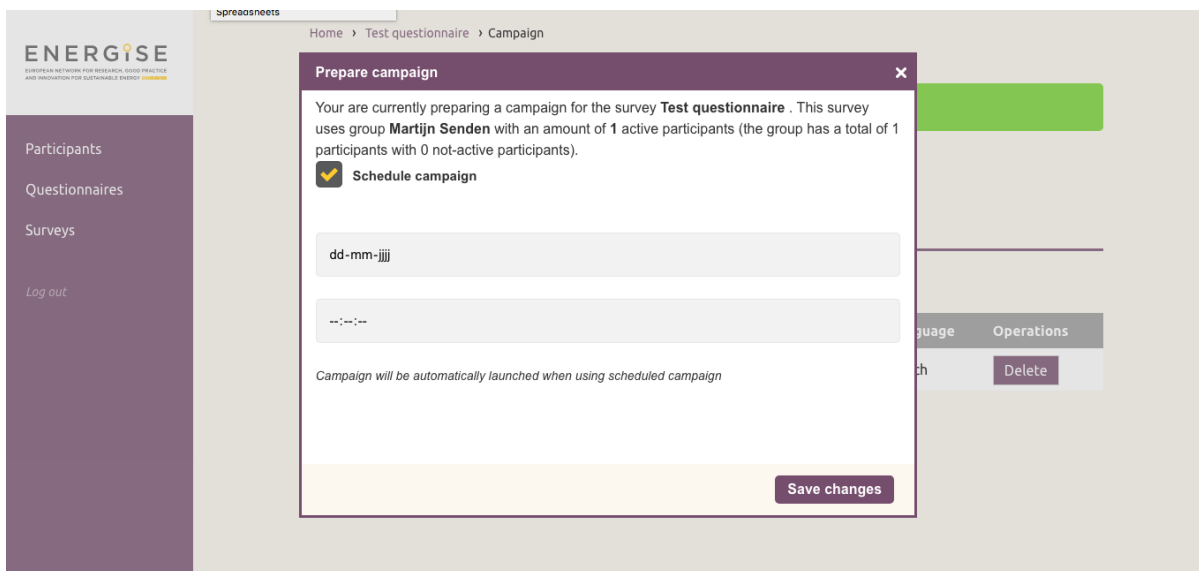
Schedule survey delivery

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**.

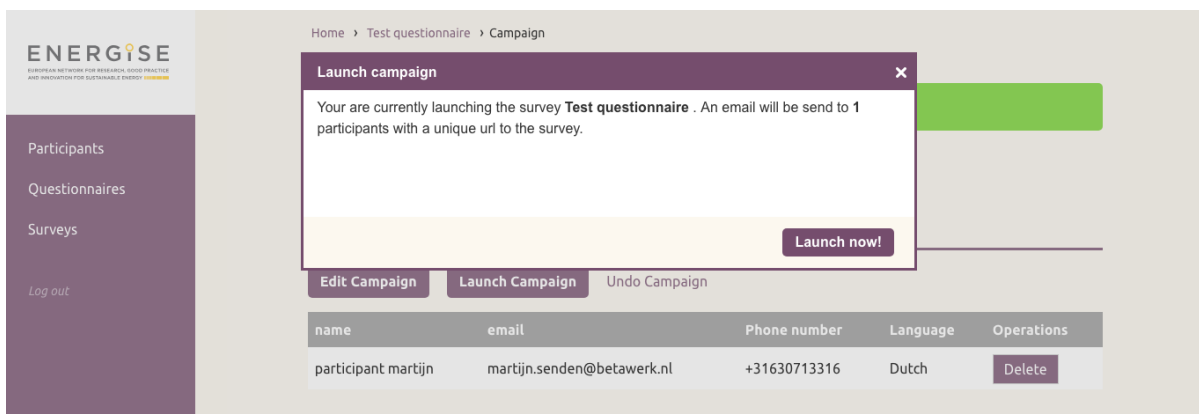
- Go to '**Surveys**' in the left side menu.
- Click the survey you wish to send out.
- *If you would like to send out again a survey that was already sent out before, you can also select 'Duplicate' instead of 'view'. All settings from that survey are copied into a new survey.*



- Click the '**Prepare survey**' button.
- Optional set a '**Schedule survey**' date and time and save.



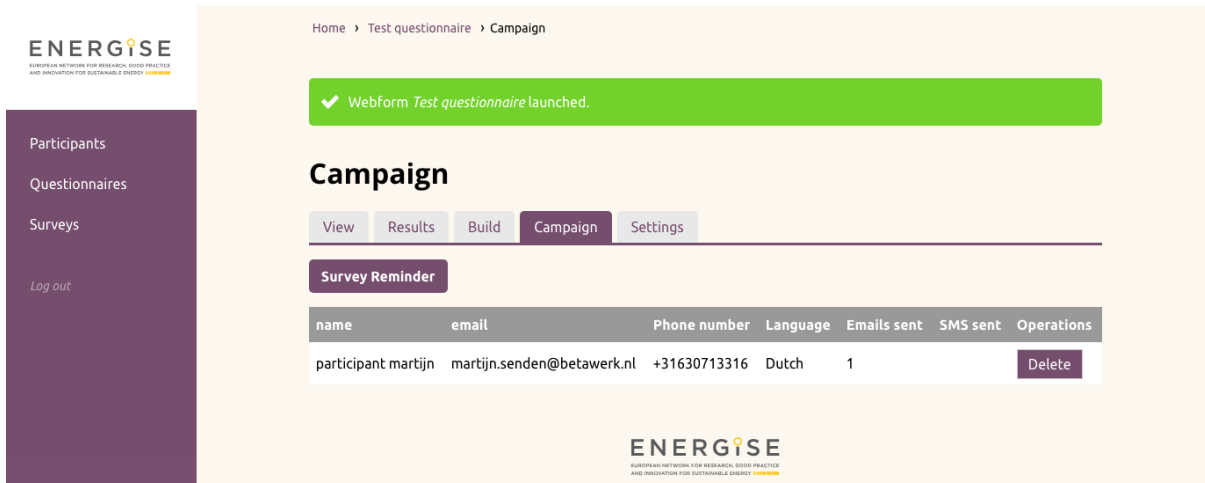
- The survey has not been sent yet. Click '**Launch survey**' button.
- The final step is to click '**Launch now!**'
- Congratulations, the survey has successfully been sent.



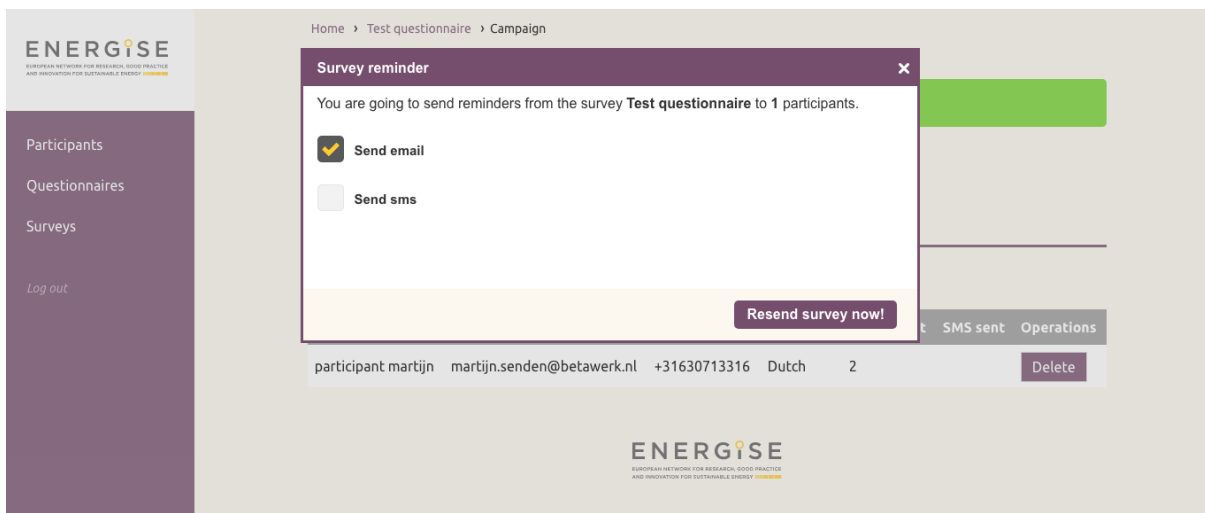
Reminders

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.



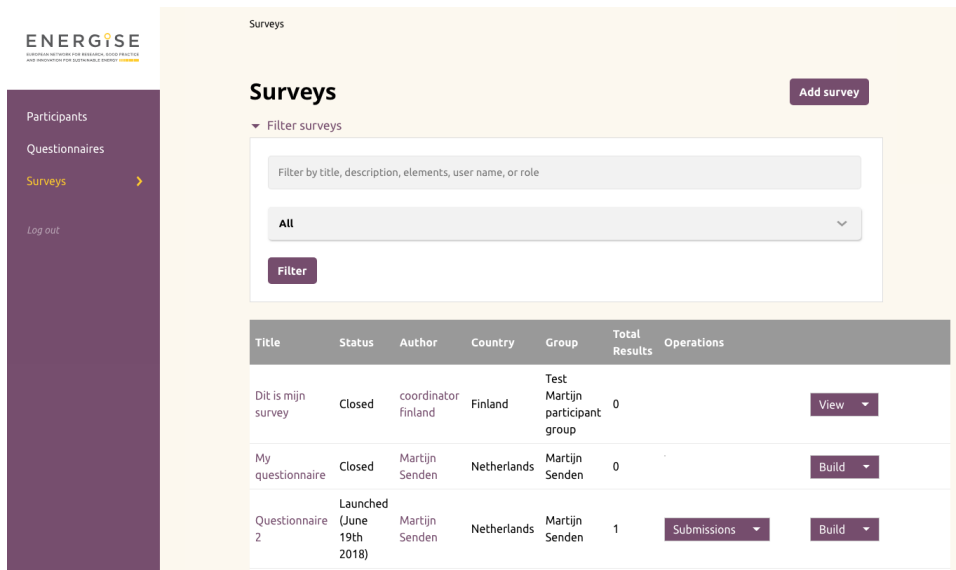
- Choose the reminder type you wish to send out and click **'Resend survey now!'** (in the settings tab the text for the reminders can be modified).



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'**.

