

Deliverable 4.2: UP-STAIRS Digital Platform Users Guide

Training Guide

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 891775.

D4.2 UP-STAIRS Digital Platform Users Guide



Project details			
Project acronym	UP-STAIRS	Start (Duration)	1 September 2020 (36)
Topic	LC-SC3-EC-1-2018-2019-2020 The role of consumers in changing the market through informed decision and collective actions		
Call identifier	H2020-LC-SC3-EE- 2019	Project Number	892037
Coordinator	University College Cork – National University of Ireland Cork (TYN)		
Contact person	Pádraig Lyons	Website	www.h2020-upstairs.eu

Deliverable details			
Deliverable Number	4.2	Title	UP-STAIRS Digital Platform Users Guide
Work Package	WP4: Creating UP-STAIRS digital tool to facilitate individual interactions and collective actions	Dissemination level	Public
Deliverable responsible	GCN	Contributing beneficiaries	All
Due Date (M)	30.11.2022 (M27)	Submission date	24.08.2023 (M36)



AGENDA Training Digital Platform

1. Targets of the UP-STAIRS digital platform
2. Timeline for the development of the UP-STAIRS digital platform
3. Description of the different User Groups of the UP-STAIRS digital platform
4. The User-Journey for Citizens and Implementation Champions
5. Use Cases of the UP-STAIRS digital platform
6. Administration of the UP-STAIRS digital platform
7. How to use the UP-STAIRS digital platform to create awareness, continuous engagement and enable collective actions?



Names, roles, abbreviations

- **Users** – general expression for people using the functionality of the UP-STAIRS digital platform (users can be citizens, SME's, OSS operator staff, Implementation Champions)
- **Citizens** – one group of users
- **SME's** – Small and midsize Enterprises
- **IC** – Implementation Champion
- **GCN** – UP-STAIRS partner and responsible for the digital platform (development, changes, new features, support)
- **OSS** – One Stop Shop
- **CRM** – Customer relationship Management (system), for UPSTAIRS, the CRM system "Microsoft Dynamics" is used
- **RE/EE** – Renewable Energy / Energy Efficiency
- **Room/ project-room** – the word "room" is used for project-related areas in the post-registration area of the digital platform, where citizens/SME's are gathered to work together with an IC on collective RE-/EE-measures
- **KPI** – Key Performance Indicator, an expression for key figures that relate to the success, performance or utilization of a RE-/EE-project on the OSS digital platform (e.g. saved kWh, renovated m², CO₂ saved,...)

How can the digital platform be reached?

All Pilot OSS's can be reached in 2 different ways

1. General landing page for all OSSs

The general landing page for all OSSs can be reached at

<http://www.upstairs-energy.com>

There, a selector is available to forward users towards the Pilot website they want to visit.

This solutions should be recognized as the "fall-back" scenario for users who cannot remember the pilot special URL (2.). In online-marketing activities the pilot specific landing page should be used.

2. Pilot specific landing pages

Each Pilot website can also be reached directly

AMB/Spain

<http://www.upstairs-energy.com/ca-es/amb>

CCC/Ireland

<http://www.upstairs-energy.com/en-ie/ccic>

ESV/Austria

<http://www.upstairs-energy.com/de-at/esv>

ASEN/Bulgaria

<http://www.upstairs-energy.com/bg-bg/asen>



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The digital platform off the UPSTAIRS project can be reached in different ways. There is one general URL, which is upstairs-energy.com and then there are pilot specific URLs which are directly linked to the content from the respective pilot OSS. The reason for having a general landing page is that in marketing materials and communication this shorter URL might be easier to use. Also in personal discussions with citizens, it is easier to remember a shorter URL then a very long complex one.

In some pilot OSS digital platforms, the platform is provided in different languages. The Spanish platform is for example provided in Spanish and in Catalan. The Austrian website is provided in German and in English and so on. Therefore, the URL' contains language locators, which you can see in the slide. For Spain, /ca-es/ means "Catalan/Spain", so language/Country.

Targets of the UP-STAIRS digital platform

The **UP-STAIRS digital platform** is **one channel** to deliver services and communication of the OSS towards citizens and other persons, companies or institutions involved.



OSS office

@ Municipality, Townhall or other locations of OSS Operator



Direct interaction
between OSS/
Implementation
Champions and citizens



Digital Platform

www.upstairs-energy.com



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The original concept of the digital platform was that the services offered by a pilot OSS can be completely offered through the digital platform, also without having a physical office. In fact, in the end all pilots decided to also have a physical office for citizens to directly talk to staff of the OSS operator and/or the implementation champions. As a matter of that, there are different ways for target customers of the pilot OSS to get in contact with the OSS. These ways are in the first place the digital platform, the physical office or offices and the direct communication and the direct contact with implementation champions, either on site, via telephone or in person in the OSS offices.

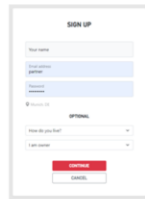
Targets of the UP-STAIRS digital platform

The digital platform is structured in two parts: The **Pre-registration** and **Post-registration** part



Pre-Registration part

General information about OSS and services offered



Sign Up



Post-Registration part

Project based communication- & collaboration-tools and additional content & services



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One of the main targets of the digital platform, besides realizing energy efficiency and energy community projects, is to get citizens registered on the platform. Therefore, there are different parts on the platform. The first part, when citizens visit the platform is the so called pre-registration part . Here the citizen can collect information, read about the OSS services,, find email addresses and telephone numbers of the OSS and so on. This part can be visited without having a registration. A lot of buttons and links are inserted on the platform to enter the registration process. If a citizen clicks on such a button or link h/she e is taken to the registration process. This needs to be done only once. The concrete registration process is described later. After a successful registration the citizen is taken to the so called post-registration part. Here the OSS can offer additional content, videos and so on. But the main functionality of the post-registration part is getting citizens on boarded into so called project rooms. In these project rooms citizens and implementation champions shall work together on energy efficiency end energy community projects. To support project management collaboration and communication tools are included in the rooms. On top, additional tools and services are included which are explained later on.

Targets of the UP-STAIRS digital platform

- The UP-STAIRS project aims to **accelerate the creation of energy communities** and **energy efficiency measures** of citizens.
- Therefore UP-STAIRS **facilitates citizen participation** in the energy transition and supports them in **becoming prosumers** or in **upgrading the energy efficiency** of their homes.
- The UP-STAIRS digital platform will help to **facilitate the organization and coordination of collective action**.
- It will help to **bring citizens, municipalities, SMEs, ICs and local and regional authorities together** by addressing energy needs at the local and regional level.
- The digital platform will **foster interaction between the members** of the collectives and provide peer-to-peer advice.



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Timeline for the digital platform development - Activities

Citizens	• Get access/ Can browse on web- and mobile app of OSS digital platform for the first time • Can register on digital platform	• Can use communication- and collaboration tools of digital platform • Work together with IC's to bring RE-/EE-projects further	• Can use communication- and collaboration tools of digital platform • Work together with IC's to bring RE-/EE-projects further
IC's	• Receive training (for digital platform and OSS) • Start working on/with digital platform • Test platform and report bugs	• Ongoing testing of platform and feedback • Work with digital platform ongoing • Report/deliver RE/EE project best practises	• Work with digital platform • Give feedback on final information & training platform
GCN	• Initial launch of the digital platform to the public • v1 of training guide delivered • Continued development of the platform	• Final scope of digital platform reached • testing of platform ends • training guide finalized for IC's	• Ongoing bug-fixes and addition/change of content • Final documentation of training platform for IC's and staff
Media			
	April 2022	September/ October 2022	September/ October 2023



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On this and the following slide the timelines for different activities concerning the platform and tools and content for the platform are described.

The digital platform will be available as a web version and a mobile version, but there won't be separate mobile apps available in app stores, instead the digital platform is programmed in responsive design, which means that it is displayed on all kinds of devices such as laptops, tablets and mobile phones in the best possible way.

To understand the scope of the platform and to operate and edit the platform, this training guide has been developed for the implementation champions and employees of the operator of the OSSs. It is updated, if additional functions are added. The final version of the training guide should be available in September 2022, when all tools and services are developed and live.

Timeline for the digital platform development – Content & Tools

From April 2022 until the end of the UP-STAIRS project in autumn 2023 the OSSs digital platform will be in operation. At launch, mainly general content about the OSS and the services offered will be available. Later on, additional content and especially tools will be added successively, as shown below.

CONTENT	• General description of the OSS • General information about the services offered • Hints to processes and external information regarding services offered	• More detailed information on technical, legal and financial aspects of the OSS services offered • Best practises documentation, as available • Initial set of training materials for IC's	• Additional best practises • Additional training materials, also for other areas of the OSS
	• General landing-page with option to navigate to Pilots OSSs • Registration process • Language selector	• Project-rooms, in which IC and Citizens gather to work on collective RE-/EE-actions • Communication-tool (chat) • Progress-meter & Project-steps • Document library	<i>(eventually earlier)</i> • Additional Pilot-specific tools (e.g. retro-fit diagnostic tool, ...)

April 2022

April 2022 – Sept./Oct. 2022

Sept./Oct. 2022 - 2023



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In April 2022, the initial version of the digital platform is launched. When that happens, the pre registration part with free content is available to all visitors of the platform. Also, the registration process is enabled. In the background, GreenCom Networks, the developing partner of the Upstairs consortium, continues to develop the post registration services and tools, which will be added as soon as they are programmed.

As mentioned above, the platform is continuously developed further. Currently, we estimate that all services are finalised and implemented on the platform until late summer. Most of the tools should be already available in spring 2022.

With this timeline it is possible for the pilots to operate the one stop shops for 18 months, even though the full functionality of the platform is not available at the very beginning.

User Groups of the digital platform



CITIZENS

Individuals or community groups are the core users of the digital platform. They who want to learn more about collective action in the energy field, existing RE / EE projects. The specific end user profile depends on each pilot region.



UP-STAIRS AUTHORITIES

These can be Municipalities or public administration bodies or energy savings associations who act as the operator of an OSS.



IMPLEMENTATION CHAMPIONS

Implementation Champions are the counterparts of the citizens interested in RE/EE measures. They initiate projects, administer the digital platform and deliver technical, financial and / or legal advice. The specific profile of the IC's depends on each pilot region.



SMALL/MEDIUM ENTERPRISES

SMEs are not a core user group of the digital platform, but can be involved in RE/EE measures, depending on the OSS services delivered in each pilot region.



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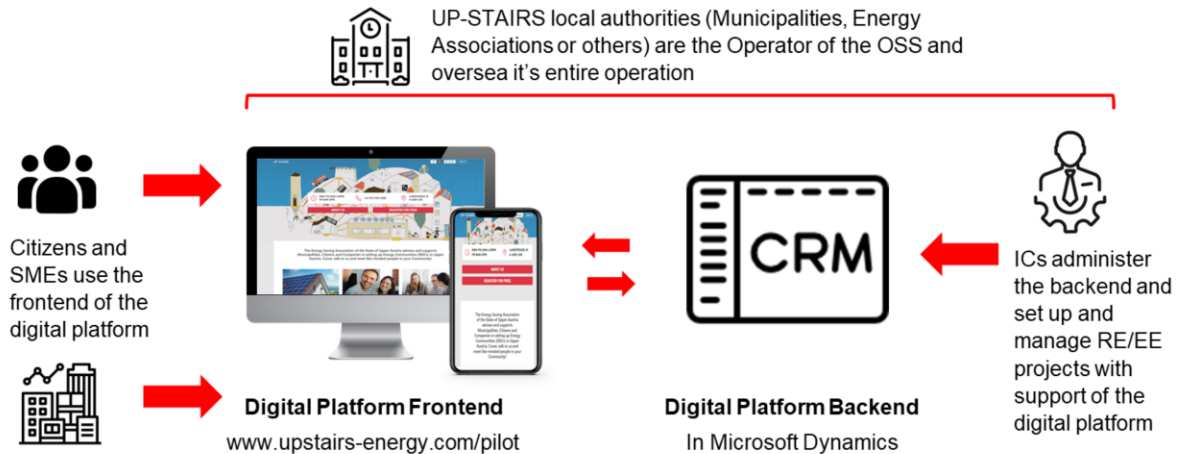
There are different user groups acting on, for and with the platform.

The upstairs authority is the operator of the OSS, the digital platform is mainly targeted towards the citizens of the region, in which the OSS is offered. These citizens are either interested in the same collective activity or want to establish a renewable energy community or to retrofit their house.

The Implementation Champions are providing their expertise in energy efficiency and energy community measurers and using the platform to actively working with citizens or groups of citizens in the so called project rooms of the digital platform.

Besides citizens, also Small and Medium Enterprises might be interested in the services offered by the OSS and join the platform as citizens do.

User Groups of the digital platform



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In this picture, the responsibilities and usage scenarios of the different user groups is shown.

The operator of the OSS has the overall responsibility for the platform and oversees all processes, changes and additions.

The Implementation Champions are administering the backend of the platform, which is done with the software tool „Microsoft Dynamics“. They open and close project rooms as needed, communicate with groups of citizens or individually, enter process steps for the projects they are working on, so that the citizens can understand which steps need to be taken in order to realize a project.

The citizens and SME's are using the frontend of the OSS digital platform. They are the „visitors“ and are seeking for advice and help, which is offered by the IC's.

The customer journey for citizens and IC's

- The customer journey map is a **visual representation of the customer journey** (for citizens and for IC's)
- It helps to understand **which steps future users (citizens and IC's) need to take in order to get to the digital platform, register and use the communication-, collaboration and project-management tools available** on the platform
- Mapping the customer journey out visually helps ensure that all partners and IC's of the UP-STAIRS project have a **common view on the digital platform**. It can also help to **better optimise and personalise the 'customer experience' in the future**, by adding steps to the journey or leaving steps out.
- If the customer journey starts by the citizen having a **direct, personal contact** with an OSS representative (OSS staff, IC), this is an ideal moment to explain the advantages of the digital platform (collaboration, communication, project-management etc.) towards the interested citizen and helps **increasing the sign up rate** on the platform

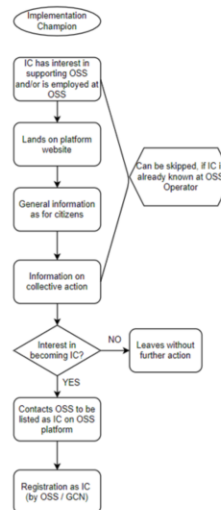
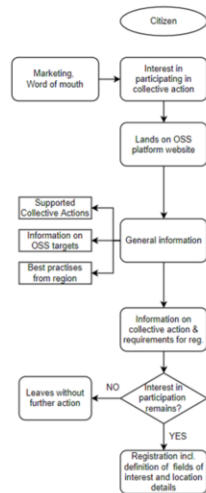


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Costumer journey citizens/IC's: Pre-registration

- The “journey” citizens take on the platform until they are registered can vary largely from each other.
- Depending on the depth of information they already received prior to coming to the platform (through personal interaction, marketing materials etc.), their journey might be longer or shorter



- If IC's need to take a “journey” on the platform in order to be registered, depends on their deployment relationship with the OSS operator and if the operator strives to “acquire” IC's through the platform or not.
- Most ICs are probably already present at the launch of the platform.
- If new ICs shall be found through the platform, relevant content needs to be provided onto the platform



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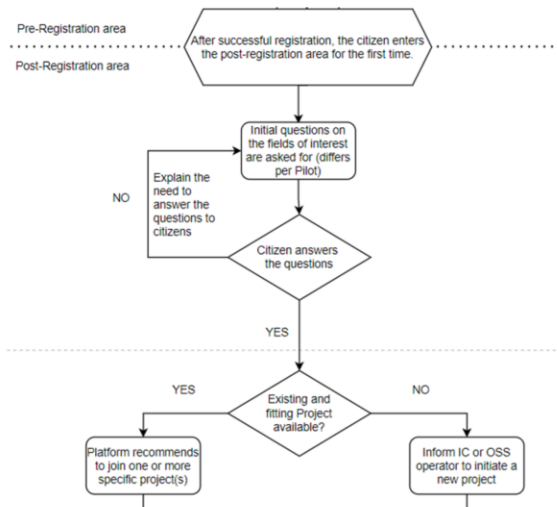


The customer journey shown here is of course the ideal-typical journey a citizen or IC could take. In real life, these journeys look different, of course. But User journeys help to understand, which steps a visitor of the platform needs to take to fulfill certain tasks, here especially the registration.

For the IC's who are already „employed“ by or engaged with the OSS or work for the operator of the OSS, the journey looks different, as they are most probably registered on the platform before the operation of the OSS starts.

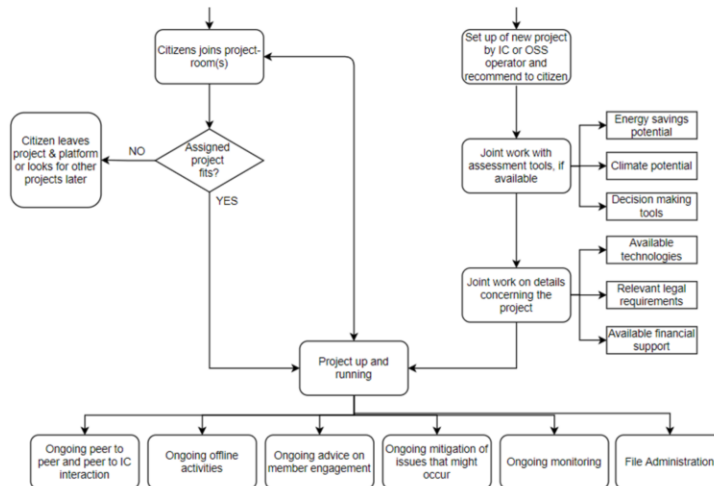
If an OSS would like to „win“ additional IC's through the platform, the process shown above comes into action. In that case, content describing the work an IC's is doing needs to be added in the pre-registration area to inform potential new IC's.

Costumer journey citizens/IC's: Post-registration



- After the initial registration the citizen enters the post registration part of the platform for the first time.
- Now, the platform asks for additional information to evaluate, what the citizen would like to achieve on the platform or what the fields of interest are.
- Based on the information provided by the citizen, projects and project-rooms are recommended to the citizen.
- Either there is a fitting project available the citizen can join or the OSS operator and/or an IC is informed that no corresponding project exists.

Costumer journey citizens/IC's: Post-registration



- The operator / IC can then decide to launch a new project room and inform the citizens about it's existence.
- If the project proposal or desire of a citizen does not match the kind of service offered by the OSS, the citizen cannot be part of an active project on the digital platform (=mismatch)
- The breadth and depth of interaction within the digital project rooms between citizens and IC's largely depend on how the IC's organize the project work with the citizens (online vs. offline/in person)

Use Cases of the UP-STAIRS digital platform

- A use case is a **description of how a person who actually uses a process or system will accomplish a goal.**
- The use cases we will introduce in this training manual for the UPSTAIRS digital platform will **describe how users perform core tasks.**
- We will describe the core use cases, available with the launch of the digital platform, and **add more use cases once they are set live on the digital platform** in the coming months.
- The main purpose of the digital platform is to provide citizens and IC's **a place to collaborate, communicate and to inform each other within collective RE / EE measures.**



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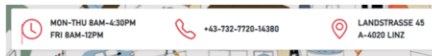
Pre-registration use cases: Get OSS contact

The user wants to retrieve the OSS contact details (opening hours, contact by phone, email, address).

1. Go to OSS homepage



2. Find / read contact/ opening hours bar



3. Scroll down on homepage to reach integrated map with OSS physical address



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Pre-registration use cases: Get OSS details

The user wants to retrieve information about the general purpose and the services offered by the OSS.

1. Go to OSS homepage



2. Scroll down to first sub-chapter of the homepage and read information



3. Get more information by clicking *more* to open additional text



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Pre-registration use cases: About us (=OSS)

The user wants to retrieve information about the operator of the OSS and why to join the platform.

1. Go to OSS homepage



2. Scroll down to second sub-chapter of the homepage and read information



3. To get more information navigate through sub-navigation on the left side of the text



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Pre-registration use cases: About UP-STAIRS

The user wants to retrieve information about the EU-funded project UP-STAIRS.

1. Go to OSS homepage



2. Scroll down to the last chapter of the homepage and read information. For more information, click on external link to UPSTAIRS website



3. Reach UPSTAIRS website and find additional information about the project, partners, pilots, news and more



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Pre-registration use cases: Legal & Social Media

The user wants to retrieve information about the Terms of Use, Privacy, GDPR and Social Media.

1. Go to OSS homepage



2. Scroll down to the footer of the homepage. Here, all legally required information and social media appearances are linked. Furthermore, important content areas are listed as well.



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Pre-registration use cases: Change language

(If available) the user wants to change the language of the digital platform.

1. Go to OSS homepage



2. In the top right corner, click on the language highlighted white to change to that language



3. The page reloads and appears in selected language



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Pre-registration use cases: Sign up

The user wants to sign up on the UP-STAIRS digital platform.

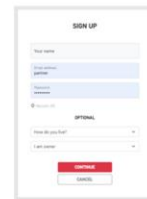
1. Go to OSS homepage



2. Click on one of the several options to register on the digital platform



3. Fill in the Sign-up page. After submitting the page, a confirmation E-Mail will be sent



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Pre-registration use cases: Log in

The user wants to sign up on the UP-STAIRS digital platform.

1. Go to OSS homepage



2. Click on the **Log in** button in the top right corner



3. Enter the E-Mail address and the Password and click submit to access the digital platform



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Post-registration use cases of the platform

- The UP-STAIRS digital platform will be the operational and technical information source for the UP-STAIRS Energy Service model framework.
- Therefore, the value of the UP-STAIRS digital platform lies in the communication-, collaboration- and project management tools, that are **available after citizens have registered themselves**.
- Through the UP-STAIRS digital platform, the **Implementation Champions will be able to facilitate** the organization and coordination of collective RE-/EE-action.



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Post-registration use cases: Join a project-room

Based on available service(s) offered by the OSS and the users intention/interest, the user is taken to a room (=project) or can actively choose to join a room.

1. Go to OSS homepage and click on the **Log in** button in the top right corner



2. Enter the E-Mail address and the Password and click submit to access the digital platform

3. The user is taken to the project-room, based on available services offered and the intention/interest the user expressed



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Post-registration use cases: Communicate w/ IC

Once a user joined a room, he/she wants to directly communicate with an IC.

1. After successful log in, the user is redirected to the project-room



2. In the central area of the project-room, the chat functionality is located.



3. The right tab of the communication tool is the Private chat. Here, the user can communicate directly with the Implementation Champion



If a new message is entered (by a User and/or by an IC), an E-mail notification is sent to the User and or IC to inform about the new message



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Post-registration use cases: Communicate w/ other citizens or the entire group (in the room)

Once a user joined a room, he/she wants to directly communicate with other users or with the entire project-group.

1. After successful log in, the user is redirected to the project-room



2. In the central area of the project-room, the chat functionality is located.



3. The left tab is dedicated to the Group chat. Here, the user can communicate to all current users of the project-room.



If a new message is entered (by a User and/or by an IC), an E-mail notification is sent to the User and or IC to inform about the new message



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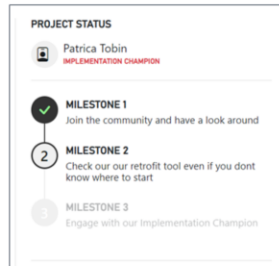
Post-registration use cases: Get information on project steps & status of these steps/the project

The user wants to know the necessary steps that must be taken to successfully complete the project.

1. After successful log in, the user is redirected to the project-room and can see the Project status in the right column

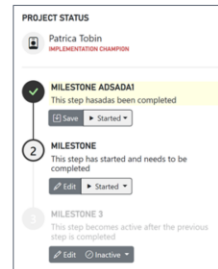


2. The Project contains the different steps until completion of a project and can be edited by IC's



Only fir IC's

3. To edit Project steps, click on a step, enter/edit step-name and status of step (not started, started, finished)



Post-registration use cases: Download document(s)

The user wants to access the project related document library and download (a) document(s).

1. In the project-room the user can see the download area and an initial set of documents in the right column

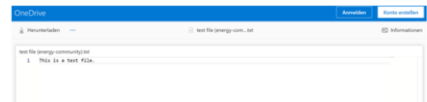


2. By clicking on one of the documents, a new browser window opens and the document library can be accessed (OneDrive)

DOWNLOADS

test file (energy-community).txt
test file 2.txt

3. Here, the document can be downloaded by the user by clicking on "Download" and saved



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Post-registration use cases: Get additional information through external link(s)

The OSS operator/IC wants to provide additional (external) information to the user.

1. In the project-room the user can access additional information by clicking on links provided by the OSS operator or IC (right column)

2. By clicking on one of the links under "Links", a new browser window opens and redirects the user to an external website



LINKS

- Sustainable Energy Communities | SEAI
- Energy Community Programme| SEC | SEAI
- Why Join The Sustainable Energy Community Network | SEAI
- Start a Sustainable Energy Community | SEAI
- Tools & Resources | Energy Communities | SEAI
- Search Our Sustainable Energy Communities Network | SEAI
- Grants For Sustainable Community Projects | SEAI



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Post-registration use cases for IC's: Access and download/upload IC-training materials

An Implementation Champion wants to access the training materials for her/his OSS and download or upload documents from/to there.

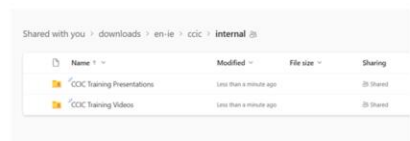
1. In any project room, click on one of the links in the download area



2. After being transferred to OneDrive, navigate to the Pilot main folder (e.g. 'ccic' for the Cork pilot). After that, click on the folder called 'internal'.



3. Underneath the folder 'internal', all pilot specific documents are stored in sub-folders. New documents can be added, existing documents can be deleted and sub-folders can be created or deleted.



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Administration of the UP-STAIRS digital platform

- GreenCom Networks leads the **development of the digital platform** (web and mobile application) as well as **testing the platform, editing content and adding tools and features**. All other project partners provide input and feedback during the development time and are testing in live operation.
- Once the digital platform goes live for the first time, there are different ways to **change** or **add** content and tools on the platform.
- The **administration** of the digital platform in regular **operation is carried out by the operator of the OSS or the Implementation Champion(s)**. With regard to the post-registration area, administration means the creation of new project-rooms, the adaptation of existing project-rooms and the deletion of project-rooms that are no longer required, as well as changes of the document library, the project progress area and calendar.
- The tools and features mentioned above include those offered at the launch of the platform to the public. The further development and changes of tools and features as well as content are described on the next page.



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How can parts of the platform be edited/ administered?

Pre-Registration part - edit



After the initial set up of the OSS digital platform, content in the pre-registration part can be edited upon request. The OSS operator must decide, which persons manage requesting changes towards GCN.

Changes can be done for **text, images, videos** up to the **addition of subpages**.

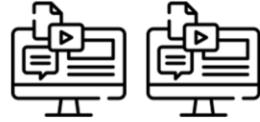
Post-Registration part – administer



The post-registration area of the digital platform is mainly **composed off tools**. **Content** is the form of documents, links, progress steps, calendar entries **can be administered through the “backend”** (Microsoft Dynamics) of the platform by the IC's or the operator of the OSS.

In the backend, **the project-rooms are also set up** by the IC's or the operator of the OSS.

Post-Registration part – new features



If, from the perspective of an OSS operator, **tools or features are missing** in the post-registration part, these can be requested towards GCN. In coordination with the other OSS pilots GCN makes an **evaluation of the programming efforts** of the requested tools and **proposes the implementation options**.

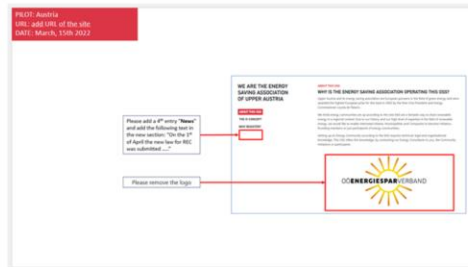
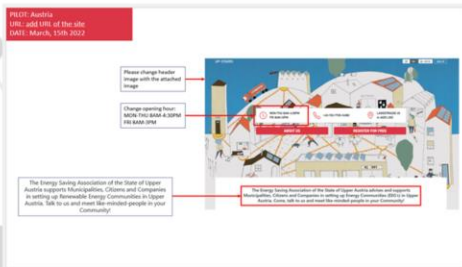


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Changing/editing content in the pre-registration part

- The initial set up of the pre-registration part of the UP-STAIRs digital platform is programmed in HTML5 – a content management system is not used currently.
- To address changes of content (text, images, videos, links, structure & subpages), please use a blank presentation, add screenshots of the area changes shall be made and add the new/changed content, comments or any other changes as shown below.
- Send the input/presentation to info@upstairs-energy.com



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Normally, larger websites presenting a lot of Content are using so called „Content Management Systems“ (CMS) to structure and edit content (text, images, videos, etc.) through a web interface. Examples for such CMS's are Wordpress or Typo3.

As in the current layout of the digital platform not too much content is presented and the focus is on providing tools and services, we decided to not use a CMS in the first place, because it is very time consuming to programm the CMS templates which hold the content.

If we see that a lot of change requests and much more content is added to the platform, we will re-evaluate the usage of a CMS.

Administering the post-registration part

- As soon as the first citizens have registered on the UP-STAIRS digital platform, project-rooms have been created and projects initialized, the administration of the tools located in the project rooms begins, so that they have the greatest possible benefit for the registered citizens.
- The following **project-room related topics** can be administered in the back-end (MS Dynamics):
 - **Setting up project rooms** with title and description and, if available, images
 - The **definition of process steps** relevant in a project
 - The **provision of documents** that are relevant for the project progress and/or the citizens involved
- The following **User related topics** can be administered in the back-end:
 - **Deleting (or setting to inactive) a user** upon request of the user (Data privacy)
 - **Moving a user from one project-room to another** (if requested by user)

For all use cases mentioned above, please send a descriptive E-Mail of what you want to get changed to: info@upstairs-energy.com



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Create awareness, engagement and enable collective actions with the digital platform

- One of the main overall goals of UP-STAIRS is to engage with citizens and to realize collective RE-/EE-projects
- User engagement is the act of building a relationship with citizens who are users of the services offered by the OSS.
- The digital platform can be one key element to increase the users' satisfaction by having a positive interaction with them on the platform.
- Very often, an underestimated fact is the difficulty to onboard users onto a web-platform initially. Therefore, once realized, it is essential to use the platform's tools to continuously engage with the users on the platform.



User engagement relies on several aspects that are faced through the whole process of delivering a service:

- Reaching the users through **proper channels and interfaces**.
- Having a **continuous communication** with them, with the **appropriate language**.
- **Creating value** for the users.
- **Building trust**, using transparent procedures, promoting a personal contact.
- Having the proper **focus on their needs** and barriers to access the services offered.
- **Gathering feedback** of users' satisfaction.



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Lifecycle of user engagement through the UP-STAIRS digital platform

1. Initial user interaction & acquisition

-  Personal interaction
-  Social Media, Adwords
-  On-Site visits
-  Phone calls
-  E-Mail marketing
-  Physical OSS visits

2. Onboarding & registration



3. Engagement, Retention & feedback



Ongoing collaboration through chat, document exchange, tasks, calendar-invites, progress-meters etc.



Optimization of platform tools and engagement strategies through feedback processes



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If the OSSs are going into operations, probably not much happens on the digital platform instantly. Citizens do not know about the platform, as long as the operator and/or Implementation Champions don't tell them about it.

Telling citizens about the platform can be done in many different ways as you see above under point 1. and for the OSS's engagement strategies have been developed on top.

It is important to keep in mind that whenever there is an option to get in contact with an citizen, tell them about the platform and to direct them towards it.

If citizens are on the platform (2) and want to register, but struggle, please try to help them with advise.

The most important part starts after citizens have joined the platform. Here, in the post-registration part, the real work with the citizens begins for the Implementation Champions. It is important to engage with citizens in person, no doubt, but to keep the project running and to add value on top, the tools provided in the project rooms can be very helpful to support the progress of the projects.

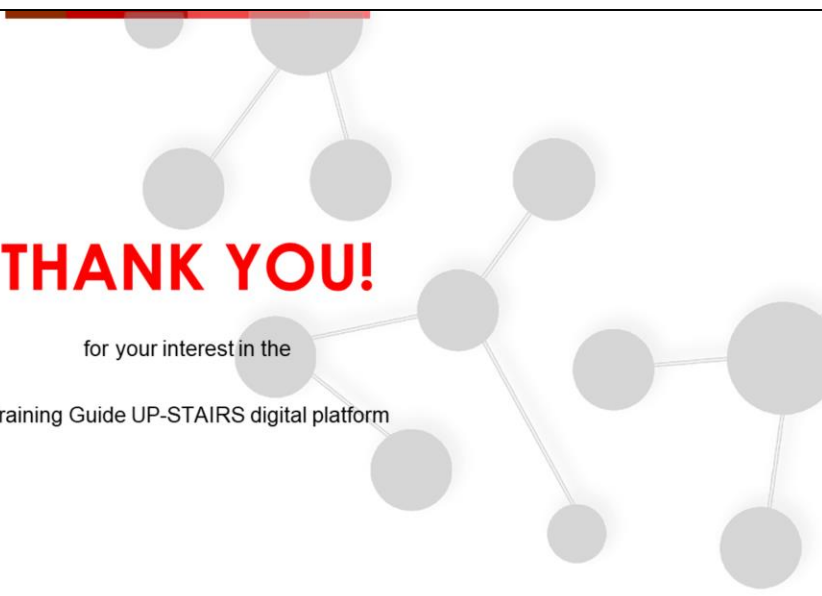
Questions, issues, requests – how to handle?

- For all open questions, issues and requests regarding the UP-STAIRS digital platform, please contact Henrik Schapp @ hschapp@enphaseenergy.com
- If possible, we will try to solve your questions by E-Mail directly.
- If this shouldn't be possible, we will set up a meeting via Microsoft Teams to discuss your questions personally.



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THANK YOU!

for your interest in the

Training Guide UP-STAIRS digital platform



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