



# Manual for Energy2B Local Coordinator

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Intelligent Energy  Europe

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## INTRODUCTION

Energy2B is an innovation stimulating initiative that targets students and encourages them to turn energy innovation ideas into reality. An important aspect of Energy2B is its online platform, which can be found here: <http://www.Energy2B.eu>. Important service lines of the Energy2B platform are the Energy2B Idea Factory and the Energy2B Competition.

The Idea Factory is an online environment where companies / organisations (“energy challengers”) can present online their energy challenges in the field of sustainability, energy saving or sustainable energy to students. Students can react on these challenges by posting their ideas online and in public. Students can vote for the best ideas posted by their fellow-students. Via the Energy2B Idea Factory the energy challenger receives potential interesting solutions for their energy challenges. Energy2B together with the energy challenger award the student(s) with the best idea(s) with prizes.

The Energy2B Competition presents an online competition for students regarding energy-related ideas with added value and possible business potential. The Energy2B Competition consists of four phases: Round 1 with low barriers for students to enter energy-related ideas; Round 2 with substantial attention for idea details and explanations; Bootcamp Round for students who passed Round 2 successfully training them to approach their energy-related idea from an entrepreneurial and business planning perspective; and European Round for those students who passed the Bootcamp Round successfully. Energy2B uses the knowledge and expertise of different kinds of voluntary experts to support students with their above-mentioned competition rounds and especially Round 1 and Round 2.

As a local coordinator you have the responsibility to offer the online Energy2B services towards students, energy challengers and voluntary experts and to control the processes of the online Energy2B services and content.

The management tool of the local coordinator is the Energy2B online control panel, which is accessible via the following URL: <http://www.energy2b.eu/controlpanel>. Via a login (username and password), the local coordinator is able to get access to the online control panel. Please, contact consortium partner SWIS if you have questions and/or issues with accessing or using the control panel via the following email address: [info@SWIS.nl](mailto:info@SWIS.nl)

This manual has the following sections:

- How to set and manage the Energy2B Competition?
- How to set and manage the Energy2B Idea Factory?
- How to set and manage the front page of the Energy2B platform?
- How to set and manage other elements?
- Overview and practical remarks

## HOW TO SET AND MANAGE THE ENERGY2B COMPETITION?

As a local coordinator you will manage the following within the Energy2B Competition:

- Define and manage the Energy2B Competition rounds, related dates and related informative text
- Create profiles of experts who support the Energy2B Competition
- Monitor and manage the evaluation process of students' competition entries by involved experts

### Define and manage the Energy2B Competition rounds

The initial definition and management of the Energy2B Competition rounds are linked to a set of dates and related text presentation options. See figure below.

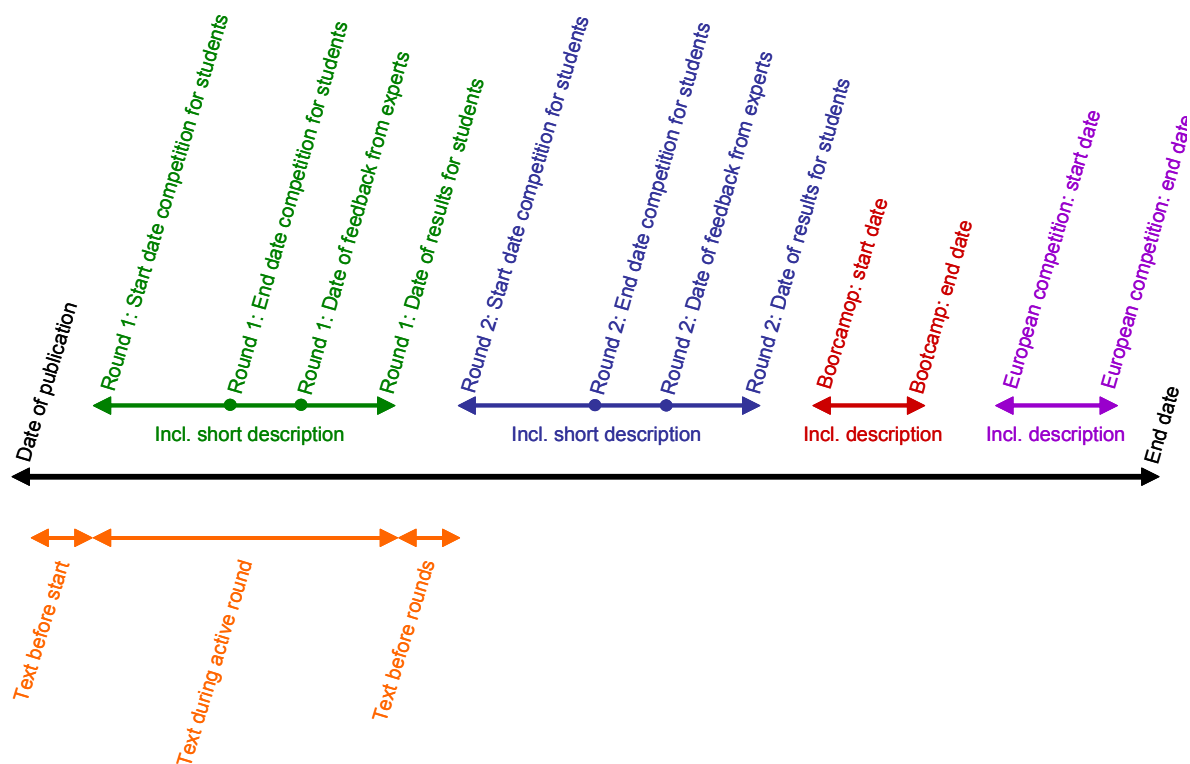


Figure 1: overview of different dates to be defined for the competition

These competition-related items can be defined in the control panel via the following steps:

- Control Panel / menu Competition / option Competition Details
- The following tabs are then available: General + Rounds + Weight Factors

The tables below show the items of the General Tab and the Rounds Tab:

Competition title
Publication date + End date

Text before start	Remark: it is possible to show in these text areas so-called 'days left counter'. See section 'Manage days left counters' for more information about these counters.
Text during active round	
Text between rounds	

Table 1: tab General

Dates and text for Round 1	Start date competition open for students
	End date competition open for students
	Date of feedback by experts
	Date of results for students
	Short description when round is not active
Dates and text for Round 2	Start date competition open for students
	End date competition open for students
	Date of feedback by experts
	Date of results for students
	Short description when round is not active
Dates and text for Bootcamp	Start date bootcamp for students
	End date bootcamp for students
	Short description when round is not active
Dates and text for European Round	Start date European round
	End date European round
	Short description when round is not active
	Short description when round is not active

Table 2: tab Round

Tab Weight Factors gives you the possibility to change the following weight factors:

Round 1	Idea Added value	See the appendix for an example of the impact of weight factors on the evaluation of student entries.
Round 2	Innovation Value Addition Market Finance Organisation Execution	

Table 3: tab Weight Factors

### Create profiles of experts who support the Energy2B Competition

The Energy2B Competition requires voluntary experts to evaluate the incoming competition entries of students. Experts cannot register themselves to join Energy2B. They need to contact the local coordinator to “apply”. Alternatively, the local coordinator contacts professionals in the region to ask them to join as expert. The local coordinator is responsible to define a team of experts to support the Energy2B Competition.

The local coordinator is the only person to initially create the profiles of experts who would like to join. This means that the local coordinator has to receive at least the following information from the experts (see also Table 4):

- Name (including titles) and contact details
- Preferences for (initial) login codes for the expert: email address and password
- Short bio describing background, expertise and added value as being an Energy2B expert
- Acceptance of the Energy2B non-disclosure

The local coordinator can create an expert profile via the following steps:

- Control Panel / menu Platform / option Website Users / click New
- The following tab is relevant for the expert profile creation: General<sup>1</sup>

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<sup>1</sup> In other words: the other tab called ‘Company’ is not applicable to create an expert profile.

Tab General offers the following items to be defined:

	Platform (chose your local platform) Date of registration
Login	E-mail & Password
Personal information <sup>2</sup>	Gender Title + First name + Last name Address + Zip code + City + Country Telephone number + Cell phone number Date of birth About (short bio) Avatar (personal image to be shown in profile) Tags
Status	The items underneath 'status' are not applicable for first registration of expert.

Table 4: tab General

Experts will receive an automated email message about the fact that their profile is created and login codes to use the Energy2B platform. After login, experts are able to adjust their profile by themselves.

Monitor and manage the evaluation process of students' competition entries

**Monitor progress of students participating the competition**

When Energy2B Round 1 is active, all registered students can join the competition. Alternatively, when Energy2B Round 2 is active, only students who joined Round 1 successfully have access to join this second round. During both rounds, the local coordinator should monitor the progress of students participating the competition. The local coordinator can monitor the progress via the following step:

- Control Panel / menu Competition / option Competition Entries

This will show a long list of students who joined Round 1 and/or Round 2 with an entry. By selecting (double clicking) a specific row (student) in that list, it will show detailed information about the student's entry.

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<sup>2</sup> Name of study (not applicable for expert) / Student ID (not applicable for expert)

## **Assigning experts to students' entries**

After the closing date of a specific round for students, it is up to the local coordinator to assign at least three (already registered) experts to a certain student entry. These assigned experts will evaluate the student's entry. The assignment process can be done via the following step:

- Control Panel / menu Competition / option Competition Entries

By selecting a student, it will give detailed information about the student's entry via two main tabs: Round 1 + Round 2. By scrolling to the section "Assigned Experts in Round 1/2" the local coordinator can assign available experts to the student's entry. When clicking "Experts notified" and saving the page, the respective experts will receive automatically an email that they are assigned to an Energy2B student entry and that evaluation / feedback is required before a certain date (see section: Define and manage the Energy2B Competition rounds).

## **Monitoring the evaluation process of assigned experts**

The local coordinator can monitor the evaluation process of experts via the following steps:

- Control Panel / menu Competition / option Competition Entry Reviews or
- Control Panel / menu Competition / option Competition Entries

The first option shows an overview of the experts' relationship with the student entries. By selecting a certain row (double clicking), it will show detailed information about the expert's evaluation and feedback activities (e.g. feedback, marks for the specific competition items and suggestions regarding "pass / no pass" of the entry to the next round).

The second option will show again the long list of students' entries. By selecting a row (double clicking) it will give detailed information about the student's entry via two main tabs: Round 1 + Round 2. By scrolling to the sections "Results" and/or "Round 1/2 Entry Status", the local coordinator can see in one view the status of the experts' feedback (e.g. marks for competition items).

## **Ending the evaluation and sending conclusive feedback to students**

The local coordinator has a final role in ending the evaluation process of a certain student entry.

- Control Panel / menu Competition / option Competition Entries

By selecting a row (double clicking) and next the appropriate tab (Round 1 or Round 2) the local coordinator has to scroll to the section "Round 1 / 2 Entry Status". After all assigned experts have evaluated the entry it is up to the local coordinator to conclude whether or not the student may join the next round. This is done by the option "R1 / R2 passed". Besides the feedback of the experts, the local coordinator has the option to give additional and/or general feedback to student via the option "Local coordinator feedback". Next, by activating "Send feedback on current round to this student on saving" and saving the page, the student will receive fully automatically an email with the evaluation details of all involved evaluation experts (marks and feedback text), including the additional / general feedback of the local coordinator.

## HOW TO SET AND MANAGE THE ENERGY2B IDEA FACTORY?

### Define introduction text of Energy2B Idea Factory

The local coordinator can define the introduction text of the Energy2B Idea Factory page via the following steps:

- Control Panel / menu Content / option Text

Next, the local coordinator selects (double clicking) the specific row saying 'Idea Factory'. This leads to a control panel where you can add / edit the title text and the paragraph text of the Idea Factory page. Besides normal text and layout options, the coordinator can insert elements like tables or images.

### Create profile of an energy challenger

The Energy2B Idea Factory requires the involvement of so-called energy challengers willing to launch so-called energy challenges within the Energy2B Idea Factory. Energy challengers cannot register themselves. The local coordinator will have to take the lead to create a profile for the energy challenger (which is labelled as 'Company' in the control panel<sup>3</sup>) and related contact person. The local coordinator can create a profile for the energy challenger via the following steps:

- Control Panel / menu Platform / option Website Users / click New.
- The following tabs are relevant: General + Company

Tab General offers the following items to be defined for the contact person of the 'Company':

	Platform (chose your local platform) + Date of registration	
Login	E-mail + Password	
Personal information	Gender + Title + First name + Last name Address + Zip code + City + Country Telephone number + Cell phone number Date of birth + About (short bio) + Avatar (image to be shown in profile) Tags	Remark: Name of study and Student ID are not applicable here.
Status	The items underneath 'status' are not applicable	

Table 5: tab General

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<sup>3</sup> Where you read 'Company' you may also read public organisations or other institutes.

Tab Company offers the following items to be defined:

Name of the company
Logo of the company
Short description of the company and/or department involved
Long description of the company and/or department involved

*Table 6: tab Company*

After successful registration, the contact person of that organisation will receive automatically a notification email, including login information to enter the Energy2B platform as an “energy challenger”.

Create and manage an energy challenge

**Create an energy challenge**

Energy challengers cannot create energy challenges by themselves on the Energy2B platform. The local coordinator will have to take the lead to create the energy challenge based on received information of the energy challenger. The local coordinator can create an energy challenge via the following steps:

- Control Panel / menu Idea Factory / option Idea Factory Challenges / click New
- The following tab is relevant: General

Tab General offers the following items to be defined:

	Platform (chose your local platform) Company (chose the energy challenge or create a profile)
Date of challenge	Starting date + End date for the energy challenge to be active on the platform
Challenge details	Title of the energy challenge Short text (short description of the energy challenge) Text (description of energy challenge, including images or schemas) Embed code (e.g. relevant online YouTube / Vimeo videos) Prize
Status	Put energy challenge offline or online

*Table 7: tab General*

As soon as the energy challenge is created and saved, the contact person of the energy challenger will receive a notification email. This person has the ability to comment on posted ideas from students.

### **Manage of an energy challenge**

As soon as an energy challenge is online, students are able to post their ideas. Whenever a student posts an idea, the contact person of the energy challenger will receive a notification email. This person can check online the progress of its energy challenge, the specific posts of students or the votes of students on posted ideas. It is even possible for that person to respond in public to ideas of students by logging onto the Energy2B platform.

As a local coordinator you can monitor an energy challenge online via the Energy2B platform. Alternatively, you can use the control panel to get are more detailed overview. Steps to follow:

- Control Panel / menu Idea Factory / option Idea Factory Entries **or**
- Control Panel / menu Idea Factory / option Idea Factory Entry Feedback **or**
- Control Panel / menu Idea Factory / option Idea Factory Entry Votes

### **Presentation of energy challenges on the front page**

The created and activated energy challenges (see above) can be presented in brief on the front page. Steps to follow:

- Control Panel / menu Platforms / option Platform Details

Via the section 'Idea Factory' the local coordinator set the following parameter: 'Display (on the front page) latest Energy Challenges of the Idea Factory'.

## HOW TO MANAGE THE FRONT PAGE OF THE PLATFORM?

### Manage the front page blocks Idea Factory & Competition

The front page of the Energy2B platform consists of two blocks (blue block and green block) to introduce with limited words the concept of the Energy2B Idea Factory and the Energy2B Competition and to route students to these Energy2B section via hyperlinks. The local coordinator can manage these two block via the following steps:

- Control Panel / menu Platforms / option Platform Details

Via the sections 'Competitions' and 'Idea Factory' the following items can be defined:

Competition	Title for Competition + Subtitle Text for Competition Button text	Remark: it is possible to show in these text areas so-called 'days left counter'. See section 'Manage days left counters' for more information about these counters.
Idea Factory	Title for Idea Factory + Subtitle Text for Idea Factory Button text	

Table 8: set front page blocks Idea Factory and Competition

There is the control panel option to insert an introduction text above the two selectors on the front page<sup>4</sup>. However, only presenting the two selectors seems to give the front page a degree of attractiveness for students to guide them to the Energy2B Idea Factory or Energy2B Competition.

### Manage the news item section

#### **Add and manage news items**

The front page of the platform can present news items created by the local coordinator. Via the following steps the local coordinator is able to add and manage news items:

- Control Panel / menu Platforms / option News / click New

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<sup>4</sup> Steps: Control Panel / menu Platforms / option Platform Details. Then go to the section 'Introduction'.

To add a new news item, the following items can be defined:

Title and date	Title of the news item Date of publication
Text and image	Short text + Long text Image + Embed code (YouTube/Vimeo)
Attachments	Attachments: adding and management

Table 9: news items

### Presentation of news items on the front page

The added new items (see above) can be presented on the front page. The local coordinator can set some parameters regarding the presentation of these news items. Steps to follow:

- Control Panel / menu Platforms / option Platform Details

Via the section 'News' the following items can be defined:

Display news on homepage (yes / no)
Maximum news items to show on the front page
Title of the new items section on the front page
Introduction text (paragraph) of news item section on the front page

Table 10: news on the front page

### Manage right column

The right column on the front page and other pages can be used to present some specific topics. E.g. information about the Energy2B initiative, information about the university, news or a spotlight (for a student, an energy challenge, an energy challenger, an expert or any other topic or actor). Steps:

- Control Panel / menu Platforms / option Platform Details

Via the section 'Right column' the following items can be defined:

Title
About the university ( <u>or any other topic</u> )

Table 11: right column

## HOW TO SET AND MANAGE OTHER ELEMENTS?

### Manage introduction sections of specific pages

The Energy2B platform consists of a variety of pages. The local coordinator can manage the introduction sections of these pages via the following steps:

- Control Panel / menu Content / option Text

Next, the local coordinator can select (double clicking) a specific page<sup>5</sup>:

About	Students
How to participate	Sponsors
Idea Factory	Contact
Experts	

*Table 12: specific pages to manage introduction text*

### Manage days left counters

The Energy2B platform offers on specific pages the possibility to present a variety of 'days left counters' regarding the Energy2B Competition rounds. E.g. 10 days left before Round 1 opens; 10 days left before Round 1 closes. The local coordinator can insert the counters on several locations on the Energy2B Competition page (see section: Define and manage the Energy2B Competition rounds). The list below gives an overview of the available counters.

{days_to_start_round1}	Number of days to the start of round 1
{days_to_end_round1}	Number of days to the end of round 1
{days_to_start_round2}	Number of days to the start of round 2
{days_to_end_round2}	Number of days to the end of round 2
{days_to_start_bootcamp}	Number of days to the start of bootcamp
{days_to_end_bootcamp}	Number of days to the end of bootcamp
{days_to_start_european}	Number of days to the start of European round
{days_to_end_european}	Number of days to the end of European round

*Table 13: overview of available days left counters*

By copy-pasting the counter code "{.....}" and insert it in the text, the counter is inserted. By saving the page, the counter will become visible on that specific page.

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<sup>5</sup> Important: the introduction text on the Competition page is managed via the Competition menu in the control panel.

Attention 1: Counters will only be visible if the status of the round is related to the inserted counter. E.g. when Round 1 is open, only the counter related to 'days left to join Round 1' will show a valid counter.

Attention 2: The days left counters make usage of pre-defined tags called 'placeholders' recognisable via the following construction "{ .....}". These placeholders control the insertion of specific counters on the pages. It is essential not to adjust these tags.

### Manage the text of automated email messages

The Energy2B platform has the ability to send automated email messages to involved parties based on certain actions and/or criteria. For example: an energy challenger receives an email message when a student posts an idea regarding an active energy challenge. Or an expert receives an automated email when he/she is assigned to evaluate a student entry of the Energy2B Competition. The local coordinator is able to manage the text of these automated email messages via the following steps:

- Control Panel / menu Content / option Automated E-mail Messages

Next, the local coordinator can select (double clicking) a specific email message:

Competition feedback reminder to experts	This e-mail is sent automatically to Experts who didn't send in their feedback 5 days before the deadline.
Competition Round 1 / 2: Confirmation of idea to student	This email will be sent as a confirmation to the student after he/she enters his idea into the local Competition.
Competition Round 1 / 2: Feedback received	This mail is sent to the students on when the Local Coordinator sends the experts feedback of round 1.
Competition Round 1 / 2: Notification of assignment to expert	This mail is sent to all experts who are assigned to an idea by the local coordinator.
Competition Round 1 / 2: Notification of feedback to local coordinator	This mail is sent when all three experts have completed reviewing an idea in the competition round 1.
Competition Round 1 / 2: Notification of new idea to local coordinator	This mail will be sent to the local coordinator when a student enters a new idea into the competition.
Contact	This mail is sent when the contact form is submitted.
Idea Factory: Feedback on student's idea	This mail is sent to a student when a company writes feedback on his/her idea.
Idea Factory: New idea posted	This mail is sent to the company when a student has posted an idea.
Idea Factory: Notification to challenger on challenge end	This mail is sent to the company when the challenge has ended.
Private profile message	This is the mail being sent from the profile of a user.
Quick Registration Confirmation	This mail is sent when a user registers in Step 1 of the Competition.
Reset password	This e-mail is sent to the user when the reset password form is submitted.
Login details new user	This mail is sent to the e-mail address of the newly added user in the control panel (by the local coordinator).

Table 14: email messages

Attention: The automated email messages make usage of pre-defined tags called 'placeholders' recognisable via the following construction "{.....}". These placeholders control the insertion of specific information from the Energy2B database into the email message. It is essential not to delete, adjust or overwrite these tags.

### Monitoring and manage profiles of platform users

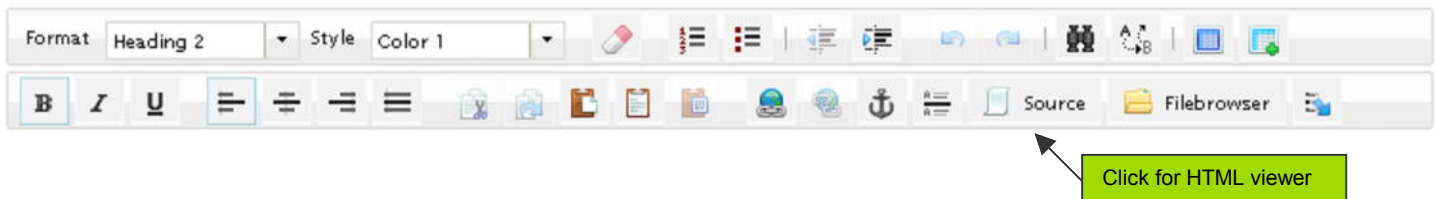
The Energy2B platform has multiple user types: students, experts and energy challengers. The local coordinator creates the profiles of experts and energy challengers. Students are invited to register themselves. This means that periodically the local coordinator has to monitor if the created profiles of students are in line with the purposes and intentions of the Energy2B initiative. In other words: aren't 'students' abusing the Energy2B platform with non-relevant information or even harmful information.

The local coordinator can monitor and manage (as an administrator) user profiles via the following steps:

- Control Panel / menu Platform / option Website Users / click on a row of a specific user

### Using HTML viewer to add/edit text sections

The Energy2B control panel offers the possibility to adjust the layout and structures of several text sections. Below the menu that can be used for layout and structure settings.



Besides the regular layout functionalities, this menu offers some more advanced options:

- Inserting and adjusting tables
- Inserting images
- Inserting links
- Inserting HTML embed code for the presentation of items like Youtube or Vimeo videos

In case of problems of adjusting the layout and the structure, it is possible to switch to the so-called HTML viewer in order to create or adjust the content via HTML coding. This function requires some minimal knowledge about HTML coding.

### Managing files

The Energy2B control panel offers the possibility to manage folders to store and use all kinds of files. This functionality is more or less the same as managing folders and files on your PC. It gives you the possibilities to define certain folders to store certain files. E.g. a specific folder for Energy2B Idea Factory images. Or a folder to store educational materials on entrepreneurship and business planning.

# APPENDIX

## Calculation example of expert evaluation based on weight factors

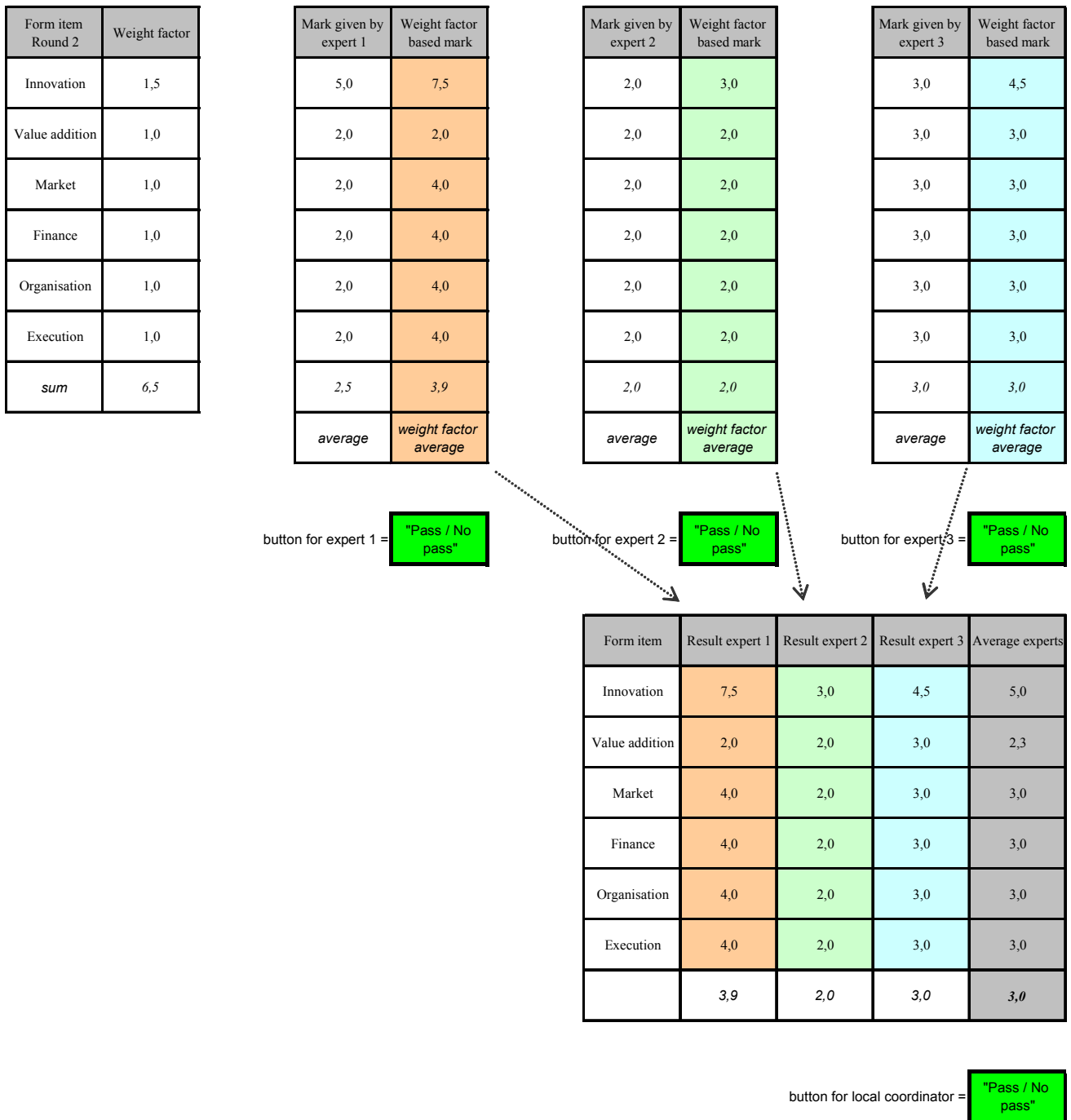


Figure 2: Calculation example of expert evaluation based on weight factors