ENERG[°]SE

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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

The ENERGISE Online Monitoring Platform was specifically developed to monitor the experiences and energy use of the, in total, 320 ENERGISE Living Lab (ELL) participants who will take part in the 16 ELLs across eight countries in the second half of 2018. The platform facilitates team collaboration while adhering to the General Data Protection Regulation (GDPR). This is achieved by allowing all research teams to access and use the same survey templates for translation and distribution and to view the surveys and survey submissions from all countries. However, participants' personally identifiable information is only visible to research teams from the same country. Clear and accessible privacy statements are available to participants in their local language at a click of a button.

The main features of the platform include the organisation of ELL participants in participant groups, the managing and translating of survey templates, the distribution of surveys via email, the sending of reminders via email or text message as well as the viewing and downloading of submitted responses. In addition, local team leads are able to manage their local research teams by adding or removing local team members as users of the platform.

All pages of the online platform appear in the project's colours and feature the project's as well as the funder's logos. Messages sent to ELL participants from the platform include a personalised form of address and a survey-specific message. Participants can open every survey by clicking the button or link in the email or text message they receive. They will arrive at a landing page showing the title of the survey and a short explanatory description. Upon submission of responses, a survey-specific confirmatory message is displayed, thanking participants for their involvement and collaboration.

The online platform and its features can be used for several purposes, also in future research projects. For the ENERGISE project, it will be used to collect data from ELL participants based on three surveys:

- a baseline survey (at the start and at the end of ELL roll-out),
- a weekly survey (once per week during ELL roll-out),
- a follow-up survey (about three months after ELL roll-out).

The data collected through the ENERGISE online monitoring platform will be analysed on a country-bycountry as well as cross-country basis in the subsequent work package 5 (WP5). Results thereby obtained will eventually feed into deliverables related to the ENERGISE conceptual framework (WP1), to the design of ELLs (WP3), to ELL implementation (WP4), to the comparison of energy practice cultures (WP5), to policy integration (WP6) and to dissemination (WP7).



INTRODUCTION

The secure and convenient collection of data from, in total, 320 ENERGISE Living Lab (ELL) participants forms a crucial part of the parallel roll-out of the sixteen ELLs across eight European countries. To enable smooth data collection, the subcontracted company Betawerk, in collaboration with Maastricht University and the entire ENERGISE project consortium, developed an online monitoring platform with the following main features:

- easy duplication of English survey templates for translation to local languages,
- o scheduled delivery of surveys to participant groups,
- o reminders of outstanding survey responses,
- secure responding to surveys from various end-devices,
- download of data for analysis in Microsoft Excel-compatible format.

To complement the qualitative research carried out in the ENERGISE project with quantitative data collection methods, several considerations informed the development of this platform. The result is a tailor-made, Drupal-based online survey tool, enabling secure and convenient survey-based data collection and management.¹ At least three different surveys will be administered through the platform to monitor household energy use and the experiences of ELL participants when experimenting with change in everyday life:

- a baseline survey (at the start and at the end of ELL roll-out),
- a weekly survey (once per week during ELL roll-out),
- a follow-up survey (about three months after ELL roll-out).

While ensuring data protection by design and by default, the platform enables easy collaboration of all research teams across the eight participating countries. By enabling the administration of the same surveys in all countries at similar times and by collecting all responses in one database, the platform is well able to support subsequent cross-country, comparative analysis (WP5).

From a researcher's perspective, the platform allows for the simple creation of online survey forms from scratch or based on existing templates, developed by the research team, that can be duplicated and translated to local languages. All required question formats, e.g. checkboxes, radio boxes, or open questions, are available for use. Local researchers can schedule every survey for delivery to a pre-defined group of local participants at a specific date and time. Responses can easily be tracked and monitored. In case a research team would like to remind participants of a previously sent survey, reminder messages including a link to the survey can be sent via email or text message. Responses to surveys can be downloaded for analysis. A local administrator or team lead can create additional, password-protected user accounts.



¹ Paper-based surveys will be provided to participants without email account or internet access at home.

D4.2 ENERGISE Online Monitoring Platform

From a participant's perspective, surveys sent by email or text message can be accessed from all common mobile or stationary end-devices by clicking a button or link. Responses can be provided conveniently, even while participants are walking through their home to report on requested meter readings.

All webpages of the tool, those visible to researchers as well as the survey forms sent to participants, follow the project's visual style and feature the project's and funder's logos. To ensure conformity with the EU's General Data Protection Regulation (GDPR), a link is provided from all surveys to a privacy statement in participants' local language.² In addition, as outlined in the project's ethical guidelines, ELL participants are able to discontinue their involvement in the project at any time and without having to provide reasons by unsubscribing from receiving ENERGISE surveys. Another key feature, which is paramount in view of the GDPR, is the protection of personally identifiable information (PII). This is ensured by securing access to all data, including personal data, through personal passwords and by limiting access to PII to researchers from the same country. In other words, participants' survey responses will be accessible to ENERGISE researchers from other countries in anonymised form only.

The following page provides an overview of the key features and functionalities of the ENERGISE Online Monitoring Platform at a glance. The following sections of this deliverable describe the online platform in detail from a researcher's perspective.

Notably, although the platform has been specifically developed for the ENERGISE project, it can be used for future research. The design is amendable and features or functionalities can be added, deleted or changed.

² In line with the GDPR, which entered into force rather recently, the ENERGISE consortium will soon sign a Joint Controller Agreement and WP4-lead Maastricht University is in the process of signing a Data Processing Agreement with Betawerk, the platform developer and host, also situated in the Netherlands.



THE ENERGISE ONLINE MONITORING PLATFORM AT A GLANCE





DESCRIPTION OF THE ENERGISE ONLINE MONITORING PLATFORM

LOGIN

The log in page is <u>https://energise-surveys.eu</u>. Members of the local research team will receive an email invitation including instructions on how to create a personal username and password.



CREATING PARTICIPANT GROUPS

In order to distribute a survey, participant groups must be defined. It is possible to organise local ELL participants in several different groups, e.g. into participants in the individual and participants in the community ENERGISE Living Lab. To create a group, researchers need to:

- Click on the **'Participants'** tab in the menu on the left-hand side which leads to an overview of local participant groups. For privacy reasons, only groups from the researchers' own country are visible.
- Click 'Create participant group' to add a new group.

	Home > Participants				
	Participar	nts			
Participants >	Create participants gr	roup			
Questionnaires	Name	Country	language	Participants	Actions
Surveys	Name of group	Netherlands	Dutch	1	edit/view
Log out			ENERG'SEE		

- Enter the 'Name' of the participant group they wish to create.
- Select the **'Language'** for this group and save. Researchers from multi-lingual countries thus have the option of involving participants who speak different languages.

ENERGISE EUROPEAN RETRODUCED OF REFERENCE, GOOD PRACTICE AND INFORMATION FOR FURTHAURLE DEEPON INFORMATION	Home › Create Participants group
Participants Questionnaires	Create Participants group
Surveys Log out	Language - Not specified - V
	You can import new participants after saving the Group
	Return to participants Save everyiew



- The group is created as confirmed by a green message at the top of the page.
- Researchers can add individual participants or upload participants in bulk to a group 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 and insert or copy-paste all information into the sheet.
 - Upload the filled-in template in the **file upload** field and **save**.

Participants can be modified until the first survey has been sent to a group. After this, a participant group is locked. However, participants have the option to unsubscribe. Researchers also have the option to manually cancel a participant subscription to a survey.

ENERG [°] SE	Home > Testgroup
AND INNOVATION FOR DUSTAINABLE ENERGY	✓ Created the <i>Testgroup</i> Monitoring.
Participants	
Questionnaires	Testgroup
Surveys	Edit Delete
	Name
	Testgroup
	Country Netherlands
	Language Dutch
	Add new participant
	Import participants Restand kings Geen bestand gekozen
	Download participant excel template.
	Return to participants Save Delete
	overview



PREPARING A SURVEY TEMPLATE FOR TRANSLATION

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

- To translate a template, researchers need to click on the **'Create survey'** option next to the template. A duplicate will be created which can subsequently be translated and used.
- All settings and text are moved into the duplicate version of the template.

	Home > Templates		
Participants	Templates ✓ Filter templates		Add template
Templates > Surveys	Filter by title, descr	iption, or elements	
Local team	Filter		
	2 templates	Description	On analiana
	Questionnaire for online training	Description This test questionnaire contains a few questions of the ELL recruitment questionnaire.	Create survey Preview
	This a template	This is the description	Create survey Preview Build



D4.2 ENERGISE Online Monitoring Platform

ENEDGes	Home > Questionnaires
EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY INFORMATION	Duplicate 'Testmartijn' form
	Title
Participants	This is the titel
	Administrative description
	opinial \mathbf{v} \mathbf{D} \mathbf{I} \mathbf{A}_2 \mathbf{X} \mathbf{X}_2 \mathbf{v} \mathbf{v}_2 \mathbf{v}_1 \mathbf{v}_2 \mathbf{v}_3 \mathbf{v}_4 \mathbf{v}_2 \mathbf{v}_3 \mathbf{v}_4 \mathbf{v}_3
	Loteni point doito su anice, consector sanjeeng ent, see diam toniny erindo tempo invidual ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consectur sadipscing elitr, sed diam nonumy erimod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. S
	Select language
	English
	Group 🔞
	- Select -
	Save

- The **'Title'** of the survey can be edited. The chosen title, e.g. ENERGISE weekly survey, will be visible to participants.
- The **'Description'** of the survey can be edited. This description will be displayed for participants at the top of the survey.
- To ensure that the correct privacy statement and EU disclaimer is displayed with every survey, researchers need to select **'Language'** and **'Group'** for a template. It is not possible to select groups from another country. The language selected in this step needs to match with the language set for a group (see 'Creating participant groups').



MANAGING SURVEYS: THE 'SURVEYS' TAB

When a specific template is selected, the user is taken to an overview of all survey elements. All questions, auxiliary and explanatory text fields are listed and can be edited. When researchers duplicate a template for the first time, care needs to be taken to translate all text. The options for the survey are available in four tabs at the top of the page.

- 'View': provides a preview of the survey.
- 'Build': allows to edit and translate all elements of the survey. (New elements and pages can also be created, allowing for country-specific modification. However, local teams should use these options only in consultation with WP-lead UM).
- **'Survey'**: in this section, researchers can prepare a survey for distribution once all text has been translated.
- **'Settings'**: The general settings of the survey can be adjusted here, including name, description, language, and participant/recipient group. In addition, reminder emails or text messages can be sent from here (see step 'Reminders').

	Home > Su	urveys				
Participants	Ques	tionnaire	e for online training	ment Add		
Templates	View	Build Survey	Settings			
Surveys >	Title	к	ey	Туре	Required	Operations
Local team	🕂 Nieu	uwe titel ca	an_you_change_the_temperature_setting_in_your_home_	Radios		Edit 🔫
Log out	 Plea additional source(s) using for s 	ise indicate any l fuel(s)/energy you may be space heating:	lease_indicate_any_additional_fuel_s_energy_source_s_you_may_be	Checkboxes		Edit 🔻
	How do you ha home, inc kitchen, lin bathroom bedrooms rooms?	v many rooms we in your luding the ving area, h is, toilet, s, and any other	ow_many_rooms_do_you_have_in_your_home_including_the_kitchen_li	Number		Edit 💌
	💠 Nam primary co	ne of our na	ame_of_our_primary_contact_person	Text field		Edit 🝷
	Submit b	utton(s) a	ctions	Submit button(s)		



TRANSLATING AND EDITING A SURVEY TEMPLATE

In the 'Build' tab of a selected survey, researchers can select and translate all elements of a survey one by one.

- Users click 'Edit' next to an element they wish to change or translate.
- A panel opens allowing users to edit all text and values. All the text fields need to be translated and saved.
- The following types of questions can be found:
 - 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 mark-up (explanatory text included in the survey)
- Important: To allow for easy cross-country comparison, researchers should only translate the text but not the corresponding value of answering options.

	Home > Test questionnaire	Edit Dit is vraag 1 element X
Participants Questionnaires Surveys	Test questionnaire View Build Campaign Settin Image: Comparison of the setting the set the	ngs Type Textarea Title Question 1 Key: dit_is_vraag_1
Log out	Title Stap 1 Add element Dit is vraag 1 Dit is vraag 2 Submit button(s)	key skap.1 dt_is_vraa dt_is_vraa actions econode 0 Broncode



THE GENERAL SETTINGS OF A SURVEY

Once all survey elements are translated and checked using the 'View' mode for preview, users can go to the 'Settings' tab where several sub-tabs are available:

- **'General'**: if needed, the name, description, language, group selection for a survey can be adjusted here.
- **'Form'**: Researchers can close a form after it has been launched. In addition, there is an option to include a custom message that accompanies the link to a survey when it is sent out to participants.
- **'Confirmation'**: Participants will get a see a confirmation message once they filled in and submitted a survey. This message can be created and saved here.
- 'Save': It is crucial to save all translations and survey preparations.

ENERGISE LINDEAN NETWORK FOR HELSARCH, GOOD PALICITE AND INFOVENCIAL FOR SUSTAINABLE DIRECT	Home > Surveys
Particinants	Confirmation
Templates	View Build Survey Settings
Surveys >	General Form Confirmation Email/SMS
Local team	✓ Confirmation settings
	Confirmation title 💿
	Confirmation message 🕧
	Opmaak - B I x _a x ^a Ω ∞ ∞ (注 : 目 : 注 99 Θ Broncode 55
	Save



SCHEDULING SURVEY DELIVERY

Once a participant group has been created and a survey has been translated, including accompanying welcome and confirmation messages, a survey is ready for distribution. This is done by:

- Going to 'Surveys' in the main menu on the left-hand side of the screen.
- Clicking on the survey to be sent out.

If researchers would like to re-send a survey that was already sent out before, as will be the case for the ENERGISE weekly surveys, they can simply select 'Duplicate' instead of 'View'. All settings of that survey are copied into a new survey.

	Surveys							
	Surve	ys						Add survey
Participants	👻 Filter su	irveys						
Templates								
	Filter	y title, descriptio	n, elements,	user name, or ro	le			
Local team	All							~
	Filter							
	Title	Status	Author	Country	Group	Total Results	Operations	
	Questionn for online training	Scheduled launched (July 29th 2018)	Martijn Senden	Netherlands	Test group 2	0	Submissions 🔻	Build 🔻
	Test surve for training	Launched (July 19th 2018)	Julia Backhaus	Netherlands	UM team - test group	0	Submissions 🔻	Build 👻
	test 2	Open	Julia Backhaus	Netherlands	UM team - test group	0	Survey	Build 🔻



- Next, researchers click the 'Prepare survey' button.
- A survey can either be sent out immediately, or at a pre-set date and time. This needs to be defined under **'Schedule survey'**.

	Home > Test questionnaire > Campaign	
EINERGISE EUROPEAN NETWORK FOR RESEARCH, GODO PRACTICE AND INNOVATION FOR EUSTAINABLE ENERGY THE	Prepare campaign X	
Participants Questionnaires	Your are currently preparing a campaign for the survey Test questionnaire . This survey uses group Martijn Senden with an amount of 1 active participants (the group has a total of 1 participants with 0 not-active participants). Schedule campaign	
Surveys	dd-mm-jjjj	
		juage Operations
	Campaign will be automatically launched when using scheduled campaign	ch Delete
	Save changes	

- The survey is only sent or set on track for scheduled delivery, once the **'Launch survey'** button has been clicked.
- A window opens reminding researchers which survey will be sent to which participant group with how many participants. The final step is to click **'Launch now!'**

	Home > Test questionnaire > Campaign							
ENERGISE EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR EUSTAINABLE ENERGY INTERNATION	Launch campaign	Launch campaign X						
	Your are currently launching the survey Test of	Your are currently launching the survey Test questionnaire . An email will be send to 1						
Participants	participants with a unique on to the survey.	participants with a unique un to the survey.						
Questionnaires								
		Launch no	w!					
	Edit Campaign Launch Campaign	Undo Campaign						
	name email	Phone number	Language					
	participant martijn martijn.senden@t	betawerk.nl +31630713316	Dutch					



SENDING OUT REMINDERS

Once a survey is sent, researchers have the option to send out an e-mail or text message reminder to participants who have not yet submitted their answers. Since there are costs involved with sending text message reminders, local teams are advised to use this option with care.

- To send out reminders, researchers need to navigate to 'Surveys' via the main menu.
- Next, the survey for which researchers wish to send a reminder is selected.
- To send reminders, researchers click the 'Survey reminder' button.

ENERG [°] SE	Home > Test questionnaire > Campaign						
AND INNOVATION FOR SUSTAINABLE ENERGY	✓ Webform Test questionnaire launched.						
Participants Questionnaires	Campaign						
Surveys	View Results Build Campaign Settings						
	Survey Reminder						
	name email Phone number Language Emails sent SMS sent Operations						
	participant martijn martijn.senden@betawerk.nl +31630713316 Dutch 1 Delete						

- Finally, researchers select the preferred reminder type and click 'Resend survey now!'.
- As described above, the text accompanying surveys or survey reminders can be modified under 'Settings' > 'Form'.

	Home > Test questionnaire > Campaign
EUROPEAN NETWORK FOR RESEARCH, BOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY	Survey reminder X
	You are going to send reminders from the survey Test questionnaire to 1 participants.
Participants	Send email
Questionnaires	Send sms
	Resend survey now!
	participant martijn martijn.senden@betawerk.nl +31630713316 Dutch 2 Delete
	ENERGÎSE
	wave additional operation of the second additional addition of the second additional addition of the second additi



DOWNLOADING DATA

To download responses collected from participants, researchers visit the survey page. From a monitoring perspective, it is important to note that also surveys distributed in other countries are visible in this overview. From the overview page, the data of all surveys can be downloaded. However, the participant data will be anonymised.

- To arrive at the overview page, researchers click 'Surveys' in the main menu.
- Next, researchers click 'Submissions' to view the results or click 'Download' to download the data.

ENERGISE ENERGISE ENERGISE AD INFORMATION FOR INTERACTION OF DEPARTNER AD INFORMATION FOR EXTENSION	Surveys							
Participants	Surve → Filter sur	YS veys						Add survey
Questionnaires Surveys	Filter by	title, descriptio	on, elements, us	er name, or role	2			
	All							~
	Filter							
	Title	Status	Author	Country	Group	Total Results	Operations	
	Dit is mijn survey	Closed	coordinator finland	Finland	Test Martijn participant group	0		View 👻
	My questionnai	Closed	Martijn Senden	Netherlands	Martijn Senden	0		Build 👻
	Questionna 2	Launched re (June 19th 2018)	Martijn Senden	Netherlands	Martijn Senden	1	Submissions 🔻	Build 🔻
	Test questionnai	Launched (June e 20th 2018)	Martijn Senden	Netherlands	Martijn Senden	0	Submissions 🝷	Build 👻



- Prior to download, researchers need to check the option 'Generate Excel compatible file'. The other settings do not need changing.
- Finally, researchers click 'Download' to download data for analysis.

ENDERNG OF DETAIL	Home ‰ Questionnaire 2 ‰ Questionnaire 2						
Participants Questionnaires	Questionnaire 2 View Results Build Campaign Settings						
Surveys	Download O'Format options						
Log out	Delimiter text format @ Comma (,) ~						
	T'Element options						
	Image: Stream of the stream of th						
	TDownload options						
	All						



INVITING LOCAL TEAM MEMBERS

The menu item 'Local team' in the main menu is only available to local team leads. Upon selection, a list of local team members is displayed. On this page, local team leads can add or delete local team members as platform users. To add a new user/team member, the following steps need to be taken (see next page for a visual):

- Entering the new team member's email address. An invite is sent to this address.
- Entering the **username** in the following format: first and last name separated with a space.
- Entering a **password**. User guidelines and password recommendations are provided. Team members are asked to change the password they received to a personal password.
- Selecting 'active' to give the member the ability to log on to the platform.
- Selecting the role 'Team member'.
- Adjusting the time zone if needed.





