



**Energy Data Innovation Network**  
**GA N. 695916**

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Main Author(s):	Carl Holland, Graeme Stuart
Other Author(s):	
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<b>Abstract</b>	<p>The on-line discussion forum is a tool for staff to use as part of an integrated awareness raising and training package allowing them to share knowledge and experiences. The Forum will use the open source Discourse software (<a href="http://www.discourse.org/">http://www.discourse.org/</a>). This is a robust, conversation-led software approach that enables users to share their knowledge and experience online. The discussion forum will initially be available in four languages, but will have the capacity to work across the EU in more languages.</p>
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## Versioning and Contribution History

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## 1. Introduction

This document is part of WP2 'EDI-Net system preparation' and introduces the communication tool – an online forum - that will be used in the project. The EDI-Net project will deliver a new service to public authorities to enable them to improve energy management of public buildings. The forum is complementary to the EDI-Net software, helping users understand issues and plan actions thereby enhancing the usability of the service and improving energy management. The forum facilitates structured communication and dialogue between users. Structured communication and dialogue is essential for raising awareness, training and engaging users in energy management and sustainable energy policy, and therefore essential for reducing energy consumption through cooperation.

In the project we define four types of users – energy managers, decision makers, finance professionals and building users – it is intended that each of these four groups will use the forum and that a community of stakeholders will form in each participating authority, using the forum as a platform for communication. Users may wish to engage in the forum actively, by starting conversations, posting and answering questions; or passively, reading and observing conversations between other users. An effective community is one that can be shaped by the users and that changes according to their needs. An effective forum becomes the platform for public authority staff to receive and disseminate information regarding the energy performance of their organisation. A successful forum can also facilitate communication between users from different organisations, removing the boundaries between public authorities to foster a Europe-wide energy efficiency network.

This report describes some of the main features of the software we have chosen for the project (section 2). It also sets out our plans for structuring the forum and allocating PPAs areas for private discussions (section 3) and provides some advice on how to build an online community (section 4).

## 2. The Software

The EDI-Net forum uses the open source “Discourse” software application ([www.discourse.org](http://www.discourse.org)). Discourse has the capability to work as a long form chat room and mailing list as well as a discussion forum. It is different to other discussion forum software, as it more closely represents the style of social media websites such as Facebook and Twitter, with scrolling, polls, the ability to ‘like’ posts, and private messaging functionality.

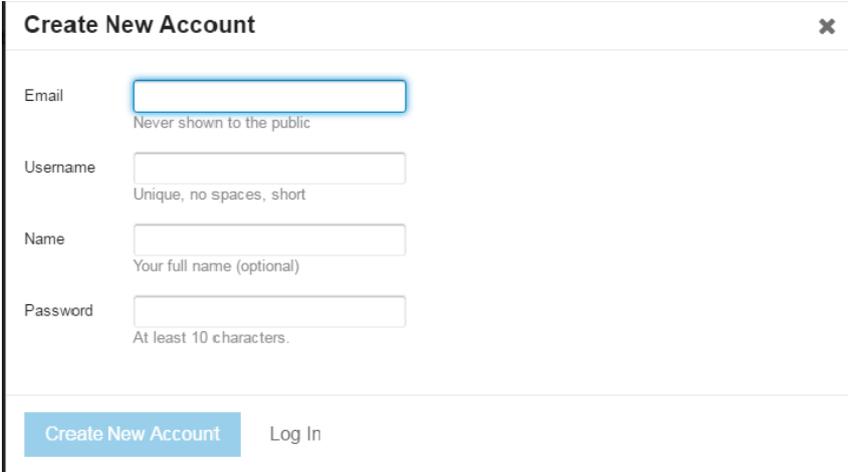
Discourse works across all platforms, browsers and operating systems, and is compatible with touch screen devices. The software auto saves drafts of messages as they are written, meaning posts are not lost due to connection or timeout issues. The software offers various metrics and analytics to understand use, easy embedding of URL’s, file attachment and images, and options for backing-up and restoring data. Discourse allows translation of forum content into other languages; 17 languages are offered at greater than 80% coverage, with a further 68 currently in development.

The software will alert users in real time regarding activity on posts that they have interacted with, either by email or by desktop notification. Users have the option to alter their subscription settings regarding such notifications. Users can opt for a single sign on, login via social media, or can post anonymously.

Those with responsibility for moderating the forum have the option to adjust the settings so that only those invited to participate in the forum can create an account and interact. Settings can be applied so that posts need to be approved by a moderator before appearing in the forum. Privacy settings can be applied so that users have restricted access, limiting users to a specific group, or a specific conversation, for example. Posts that are deemed to be inappropriate can be removed, or flagged as inappropriate for further investigation.

## 2.1. The sign-up process

The forum welcomes the user and asks them to create an account or to login.



The screenshot shows a 'Create New Account' dialog box with a close button (X) in the top right corner. It contains four input fields: 'Email' (with a blue border and the note 'Never shown to the public'), 'Username' (with the note 'Unique, no spaces, short'), 'Name' (with the note 'Your full name (optional)'), and 'Password' (with the note 'At least 10 characters.'). At the bottom, there is a blue 'Create New Account' button and a 'Log In' link.

**Figure 1: Screenshot of the forum registration and login page**

Once users have created an account, a moderator is required to approve their application and set their account permissions. If the user creates an account using their organisational email account, they can be automatically assigned permissions and access rights. Once approved, users can interact in the forum in the designated areas.

## 2.2. Primary functionality

The main function of the discourse software is to enable conversations between users. The primary elements of the discourse software are **topics**, **posts**, **categories** and **groups**. Users engage in conversations by creating and editing these fundamental building blocks.

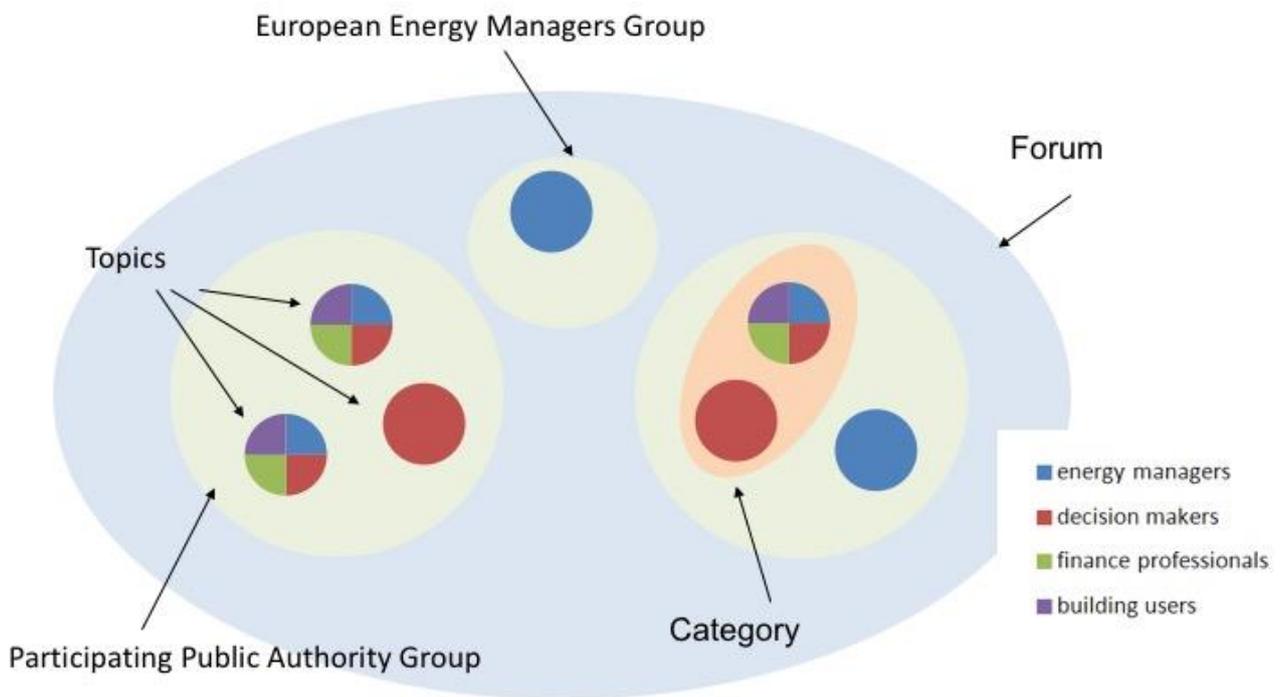


Figure 2: Overview of the different groups and their engagement in the forum

### 2.2.1. Topics

Users can create a new **topic** in the forum. A 'topic' is a headline for an area of conversation, typically accompanied by a description of the topic, or a question. For example, a user may wish to start a new topic regarding insulation. The topic headline might be 'Insulation Upgrade' and the accompanying text describes the issue with upgrading insulation, for example *'advice on upgrading insulation'* or *'Has anybody compared the performance of rock wool and expanded polystyrene insulation types?'*. Other users can interact with this topic by posting a response.

If a user wants to interact with a topic, they can create a post. A post is a response to a topic that has already been created, but can also be a response to another user's response to the topic. A topic can therefore have several responses from several users. A post can take many forms – from being a direct answer to a topic ('rock wool is the best insulation') to a request for further information ('whereabouts in the building are you planning to insulate?') a URL (<http://www.superhomes.org.uk/resources/whats-best-insulation-material/>) or can involve sharing documents or photos.

### 2.2.2. Categories

To introduce some structured navigation and to organise the list of topics it is possible to create **categories**. When topics are created they can be allocated to a given category and so categories contain many topics. Topics can be moved between categories and categories can optionally be made private to certain groups.

### 2.2.3. Groups

**Groups** are collections of users that have a common characteristic. For example, the screenshot below shows a group created for employees of Leicester City Council. Groups can be created for any purpose; as here, belonging to a specific PPA, or, for example, a group for energy managers or for decision makers. The visibility and permissions for the group can be set, as can the option to automatically assign new accounts to a group based on their email address.

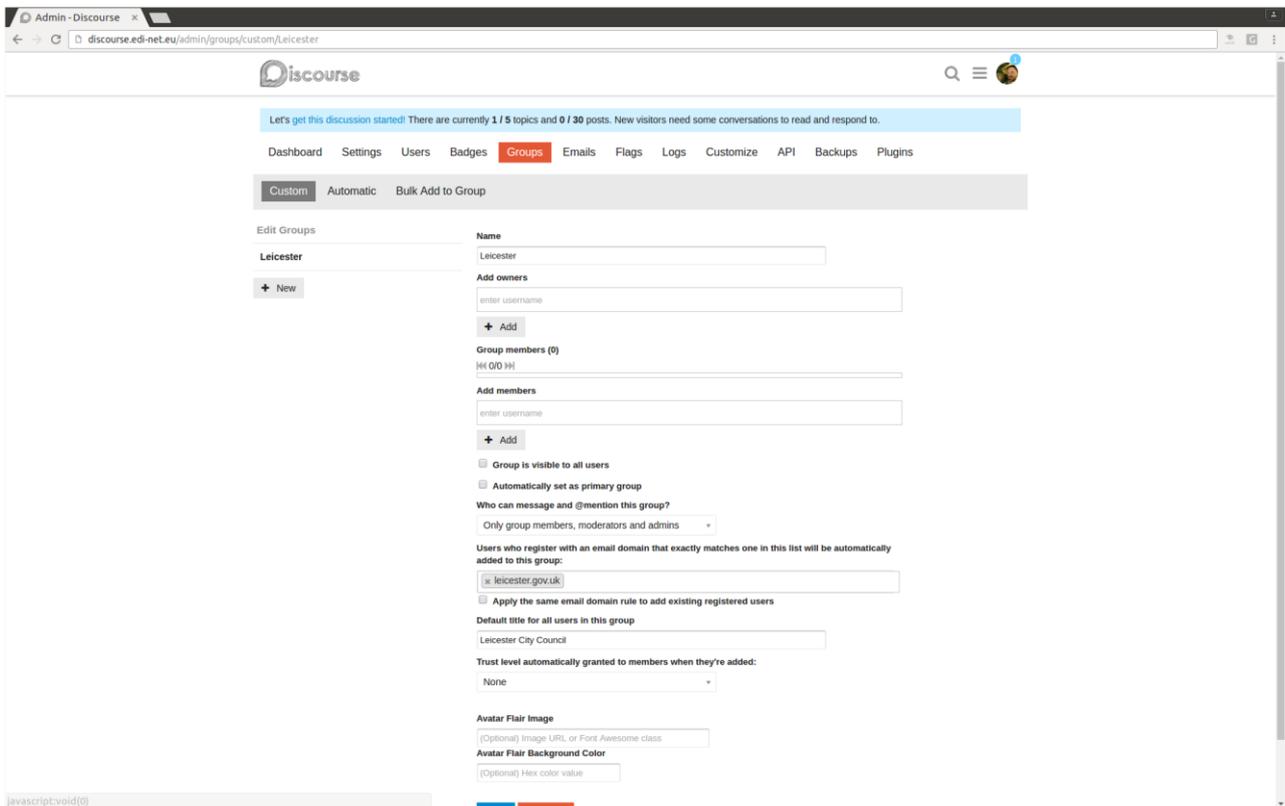


Figure 3: Adding a new group in the forum

## 2.3. User Resources

In addition to the categories, there are several resources for users that are provided with a Discourse forum. These resources provide guidance for using the forum, frequently asked questions, and terms of service, for example. These resources are fully editable by forum administrators and provide a great way for new users

to learn how their community works whilst learning how to use the software. The guidelines and frequently asked questions are shown in the screenshot below.

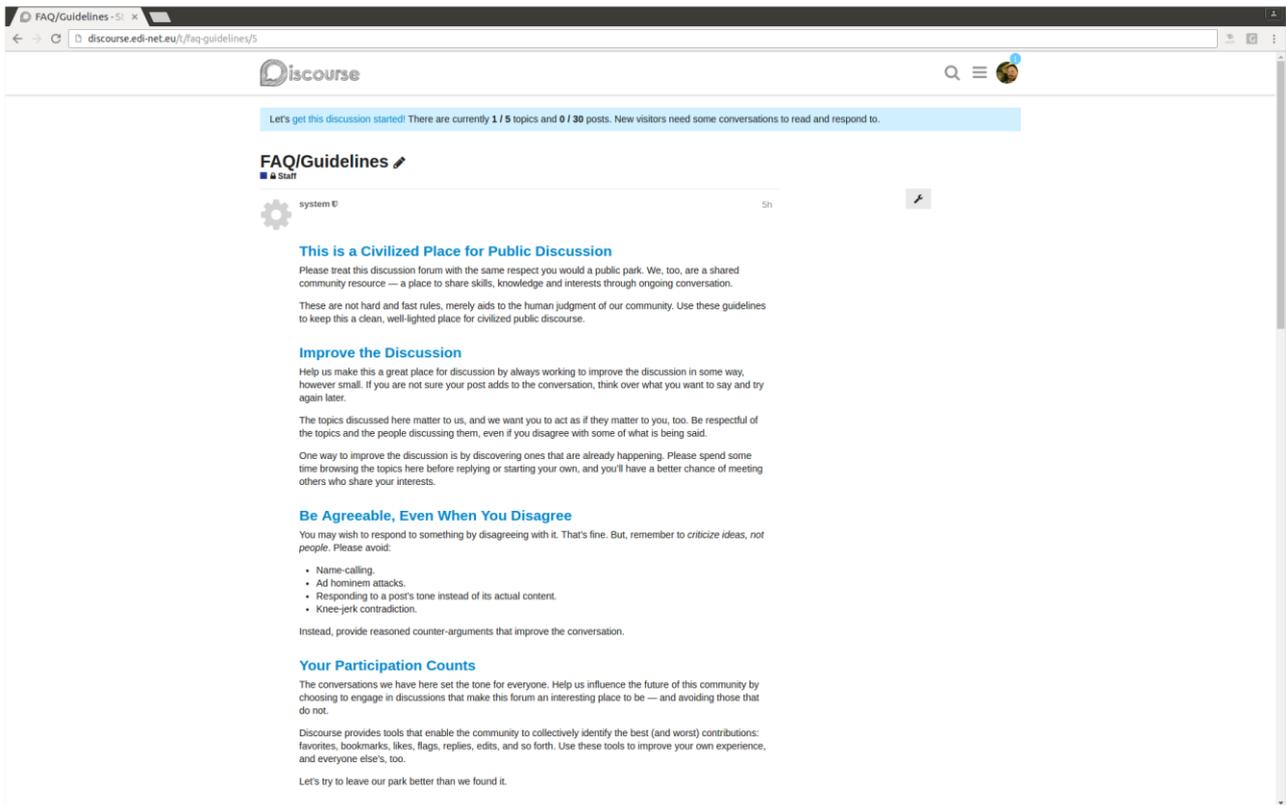


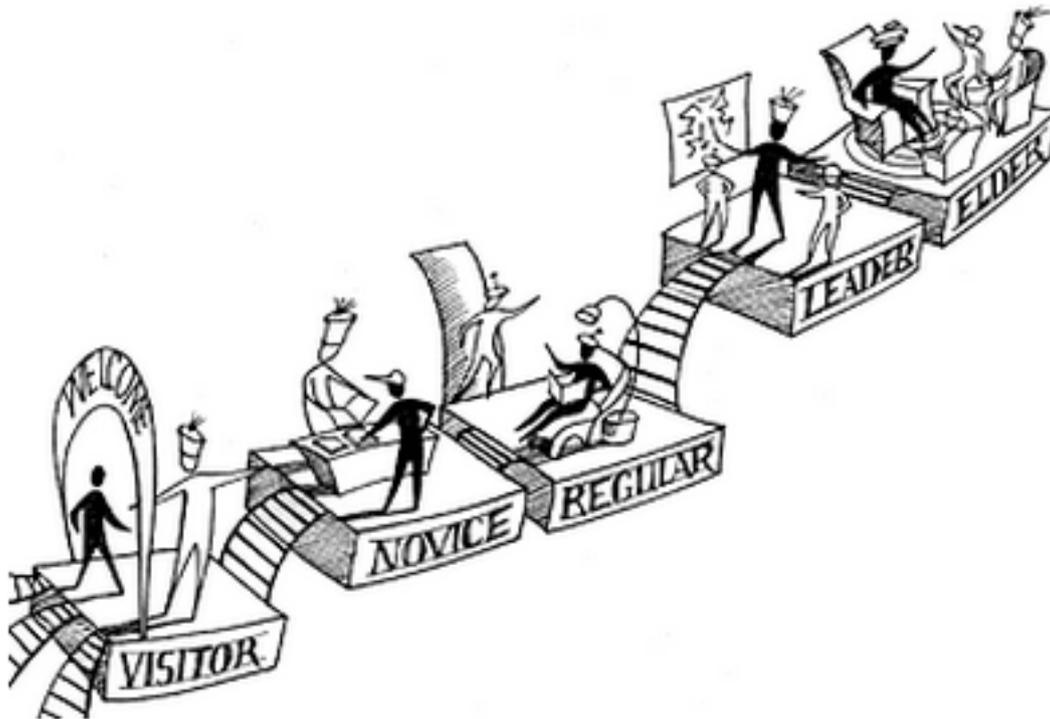
Figure 4: Editable FAQ/Guidelines to help new users

### 2.3.1. Searching the Forum

All main elements of the forum are fully searchable. A simple search tool allows for a full-text search of the topics and posts within the forum. When creating a topic, the system will suggest existing topics which may match the content you are creating so as to avoid replicating subjects across many topics. There are many such features designed to make the experience of being a member of the community more about furthering the goals of the community and less about software issues.

## 2.4. Trust levels

Administration and control of the forum is distributed across five levels of trust – new, basic, member, regular and leader. Users start at the lowest level (new) and move up the levels by reading, posting and generally engaging in the forum.



**Figure 5: The different user levels in the forum**

Trust levels are a way of...

- Sandboxing new users so that they cannot accidentally (or intentionally!) hurt themselves, the forum, or other users while they are learning what to do.
- Granting experienced users more rights so that they can help maintain and moderate the community they generously contribute so much of their time to.

New users are restricted in what they can do. For example, they cannot:

- Send private messages to other users
- Flag posts
- Post more than 1 image
- Post any attachments
- Post more than 2 hyperlinks in a post
- Mention more than 2 users in a post

A 'new' user gets to be a 'basic' user by:

- entering at least 5 topics
- reading at least 30 posts
- spend a total of 10 minutes reading posts

A 'basic' user can become a 'member' by:

- visiting at least 15 days, not sequentially
- casting at least 1 like
- receiving at least 1 like
- replying to at least 3 different topics
- entering at least 20 topics
- reading at least 100 posts
- spend a total of 60 minutes reading posts

And progression to a 'regular' is by:

- must have visited at least 50% of days
- must have replied to at least 10 different topics
- of topics created in the last 100 days, must have viewed 25% (capped at 500)
- of posts created in the last 100 days, must have read 25% (capped at 20k)
- must have received 20 likes, and given 30 likes.\*
- must not have received more than 5 spam or offensive flags (with unique posts and unique users for each, confirmed by a moderator)
- must not have been suspended

These are the thresholds set by the Discourse software. These can be changed by the Super Users if this is deemed necessary.

### 3. The EDI-Net Forum

A discourse instance has been created for the project at <https://discourse.edi-net.eu>. This single instance will be used by all of the Participating Public Authorities (PPA).

DMU are the administrative super users of the forum with overall responsibility for all areas. DMU will provide support to cities by creating areas of the forum that are privately controlled. For categories that are open to all users, DMU will act as moderator. Creation of categories is a privilege that initially only DMU will have. Over time, it is expected that community leaders will emerge and can be given powers and responsibility for moderating the forum. In this way, it is expected that communities will eventually become self-moderating.

#### 3.1. Public by default

Much of the activity on the forum is expected to be public. The benefits of public access to the forum far outweigh the disadvantages. Especially in terms of enabling 'lurkers', users who read forum discussions in detail but may never contribute or even sign-up to the forum. Attracting new users to the forum requires content to be visible so prospective users can review the forum content and choose whether to join.

#### 3.2. Private Categories

There are many use-cases where PPAs may want to engage in internal discussions privately on the forum. PPAs will be allocated a private category which will be visible only to a specific user group. For example, the project partners have a private area for discussions solely about the project. To enable this, control of the membership of a unique user group will be passed to each PPA. In this way, PPAs can if they wish grow a private community which will be accessible by invitation only.

Categories and groups are useful for organising content. Until we have significant volumes of topics to organise there is little point in imposing any structure beyond the private categories described above and the default (and recommended) categories provided by the discourse software.

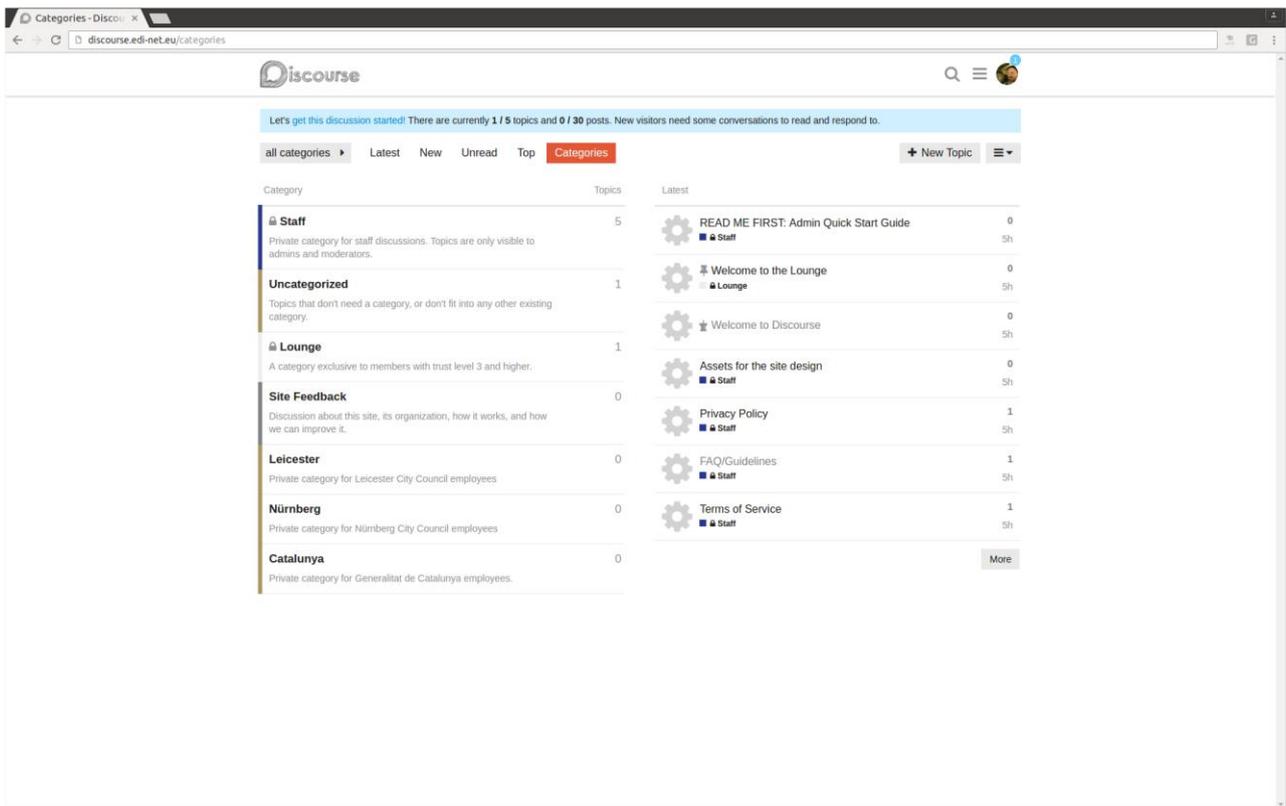


Figure 6: EDI-Net forum categories

The screenshot above shows the categories currently available in the forum. One each for the three pilot cities (Leicester, Nuremburg and Catalonia). The 'Site Feedback' category is reserved for discussions about how the forum should be structured and how the community should operate. There is also a category (Lounge) for experienced/privileged users and a category for the project development team (Staff). For a new user the only category that will currently be visible will be 'Site Feedback'. When a user is allocated to their PPA group then their PPA category will also become visible.

### 3.3. Community driven

DMU will act as administrators to serve PPAs with structure described above. However, most of the activity of the forum must be driven by the community itself.

The creation of groups and categories will be left to the community to decide upon, with guidance from DMU. As the need arises for groups and categories to be created then proposals will be posted as a new topic in the 'Site Feedback' category and the community will be invited to comment. Structure can be created for any reason, and the community will be free to instigate the addition of new structure

## 4. Building a Community

When the discourse software is first deployed it is empty. There are no users, there are no conversations. The EDI-Net project partners will be the initial core users of the forum and will need to create an initial collection of engaging content.

As this process continues the forum will become ready for potential new users to read, join and to contribute. However, people will not automatically find and join the community. We need to identify and invite the next wave of users. These users may be individuals who we directly engage within our organisation or those we can identify as having a special interest in energy-related issues.

Our aim is to have a thriving community of engaged individuals discussing issues which help them to promote energy efficiency within their organisations and to promote cooperation between stakeholders thereby impacting on the energy performance of buildings. The community can provide its members with the opportunity to share experience between professionals, provide advice on complex issues and gather information from individuals spread across hundreds of buildings across Europe.

However, when we first set up the discourse software it will be empty. So how can we kick-start the process and keep the momentum going?

**“Be patient. Building communities is hard. It takes months if not years.”**

**- Jeff Attwood, (Discourse founder)**

(<http://blog.discourse.org/2014/08/building-a-discourse-community/>)

### 4.1. The 'Site Feedback' category

The 'Site Feedback' category is for topics about the community operation. Such as:

- Which topics should we allow and encourage? Which topics should we explicitly discourage?
- What sort of replies are we looking for? What makes a good reply versus one that is out of bounds or off-topic?
- What are our standards for community behaviour?
- How can we welcome new members of our community and encourage them?
- Are we setting a good example for the kinds of discussions we want in our community?
- What problems and challenges does our community face, and what can we do about it?
- How should we moderate our community, and who should the moderators be? When should we flag posts?
- How do we publicise and grow our community?
- How should (or why did) the rules change?

## 4.2. Pinned topics

The discourse software allows for selected topics to be 'pinned' within categories and across categories. Pinned topics appear at the top of the list of topics for new users. As such these pinned topics are usually the first thing users click on and are great places to explain the purpose of the forum and to introduce each category. New users will be directed to these topics which should help them to orientate themselves within the forum.

This document has introduced the forum that has been developed for use in the EDI-Net project, covering the software, functionality and structure of the forum. Although the forum is operational, the EDI-Net services are yet to be launched to the three pilot participating public authorities, and therefore the forum is as yet unpopulated and empty.

Categories have been created in the forum for each PPA to facilitate private dialogue, as well as public categories to allow communication across PPA's and with the project team. Groups have also been created to categorise users depending upon their characteristics.

Although categories and groups have been created, the intention is to largely allow the forum to grow organically as users' needs demand. This approach to developing a bottom up forum, rather than imposing in a top down manner a structure, has been chosen to facilitate and engender greater dialogue. Future users will have the opportunity to shape, improve and develop the forum as they see necessary.

## 5. Conclusion

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