EDI__Net

Energy Data Innovation Network

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Abstract	This deliverable provides a detailed insight in the numerous online training facilities ranging from materials, forum, tutorials and live webinars.

Versioning and Contribution History

Version	Date	Modified by	Modification reason
v.01	01.08.2018	Georg Vogt	First draft
v.02	26.08.2018	Georg Vogt	Second draft
v.03	17.12.2018	Strahil Birov	Final draft
v0.4	19.12.2018	Graeme Stuart	Update of section 2.4
v0.5	28.01.2019	Darsheet Chauhan	QA edits and Final version

Executive Summary

This deliverable, *D5.3 Report on online training delivery,* reports on the online training made available and conducted within the EDI-Net project.

The list of available training materials is documented in D4.4.

Ordered by degree of interactivity (from low to high), the forms of online training include:

- **Online training materials**
- **Tutorials**
- **Live Webinars**
- **Discourse forum**
- **Informal bilateral training sessions, including:**
    - Mail
    - Skype
    - Screen sharing
    - Guided exchange via phone

All training forms involve the use of the training materials developed in the project. Feedback, questions, updates etc. at the training events have led to improvements in the materials. Templates of the materials are stored centrally on the project's cloud storage system (OwnCloud) and new iterations of files are uploaded without delay to the EDI-Net server, ensuring unique, unchangeable links are being used on the project website and the forum.

The materials are in different formats, from documents and checklists to presentations and online tools. They can be easily replicated and customised to, for instance, adapt it to the corporate design of the PPA. All pilots and PPAs are invited to contribute further material and translations which will be included into the repository and shared among the entire EDI-Net community.

All training materials, included recorded training sessions, are public and available via the website and the forum. Users can download individual files or a repository of all materials (with the exception of videos).

Table of Contents

1   Introduction

This deliverable reports on training workshops.

Chapter 2 reports on all methods of online training.

Chapter 3 summarises the training activities in the project.

2   Training materials

2.1   Online training materials

Research on training materials has shown that descriptions on "how to" engage with users to promote energy efficiency services often exist, resulting from piloted projects. There is, however, a lack of supporting materials that were used in the projects and that can be re-used to replicate their success. The few available materials are not user-friendly, i.e. are static uneditable files, do not offer templates, and require a lot of adaptation effort.

It is the goal of EDI-Net to provide templates and materials which are accessible online and which can be easily applied in the busy environment of running a municipality. Explanations on best practice of, for instance, how to organise a focus group are kept as brief as possible and templates are provided, easily adaptable for use by the interested authority.

To simplify orientation and to set a clear focus, training materials are grouped in four steps: UNDERSTAND, SETUP, MOBILISE and COACH. They are available on the EDI-Net web-site and the EDI-Net forum.

The training materials are also the basis for communication towards politicians and finance officers. The UNDERSTAND section provides introductory input and arguments for the "buy-in", i.e. benefits of using the EDI-Net services. The MOBILISE section explains which important role politicians and other public officials could play to guarantee the success of the implementation. The COACH section provides numerous tools to calculate financial savings resulting from specific energy efficiency actions. Every measure can be translated to an analogy decision makers can easily remember and utilise in public speeches.

This section describes the availability of materials for each step. Screenshots are provided where helpful. The final version of the online guideline describes procedures and provides all materials centrally on the EDI-Net website.

The final list of available training materials is documented in deliverable D4.4.

2.2   Tutorials

A series of tutorials has been recorded to present EDI-Net in a short format and to explain the core functionality of the dashboard. All videos are available on YouTube and are linked within the forum and on the EDI-Net website, as well as in the training material package itself.

The videos include two explanations to understand the EDI-Net tool:

- EDI-Net UNDERSTAND-Dashboard Public Tutorial (link)
- EDI-Net UNDERSTAND-Energy professionals (link)

Furthermore, a series explaining the functionality of the dashboard tool has been recorded. The content is based on the EDI-Net manual also developed by the project, and structured in similar fashion to be complementary to it.

- EDI-Net SETUP-Dashboard-1-Access (link)

- EDI-Net SETUP-Dashboard-2-Data Import (link)
- EDI-Net SETUP-Dashboard-3-Devices Meters (link)
- EDI-Net SETUP-Dashboard-4-Reporting (link)

2.3 Live Webinars

The EDI-Net consortium organised a total of three live webinar sessions. It has to be noted that participation in live webinars cannot be expected to be very high. It is common standard to record webinars and to publish them afterwards which has been advertised transparently from the beginning.

This has several advantages for the viewer. They do not have to have access to internet, headset and the web-site at a specific time. Since we provided a "content" list with timing points with the video, they are enabled to skip sections of the video to focus on what is most relevant to them whilst participating in the live session is often linked with waiting etc. This observation is not only true for webinars but also podcasts which have become an increasingly popular media format.

Three sessions have been recorded.

Utilising metering data with EDI-Net (link)

The first webinar focused on describing EDI-Net and its tools. This is aimed at users who cannot participate in live training classes. A total of 12 users took place during the live session.

The following text is included in the description of the recording on YouTube:

Understand how a dozen cities uses the different tools of EDI-Net to make metering data from public buildings accessible to everybody via smileys, how to roll-out such a service and why to keep track of data alongside with measures.

Content of video:

- Start – Polls and waiting room
- 4:15 – Key features presentation across EDI-Net tools
- 18:00 – Dashboard presentation
- 34:35 – Forum presentation
- 38:50 – Training materials overview
- 41:25 – Benchmark tool presentation
- 44:30 – Next steps if you want to get access

Using monthly metering data to benchmark building portfolio (link)

The second webinar focused on the benchmark tool. As it is not publically available, interested PPAs often have additional questions on what the functionality is and how it is best utilised. The video was conducted with the developers at CIMNE, including a short Q&A exchange with the host at empirica.

The following text is included in the description of the recording on youtube:

The EDI-Net Benchmark Tool allows municipalities to gather insights from past consumption and efficiency measures. Learn which buildings need investment and what measures have been undertaken in similar

buildings across Europe. If you already use the Dashboard tool, all data is also available. For all other municipalities which expect smart meters to be installed soon it is the first simple step to utilise sub-hourly data without having to invest in Energy Management Software.

EDI-Net Best Practice Use Cases (link)

This webinar presents successful use of EDI-Net in the field. Best practices include use in a school with children, wastage detection, large portfolio handling, evaluation of efficiency measures and collaboration in the forum.

Content of video:

- 0:00 Welcome and Overview
- 1:25 Nuremberg saving water with Dashboard and quick response
- 11:59 Leicester saving electricity in schools and providing evidence to finance
- 19:45 Catalonia handling a large portfolio in Benchmark tool and making decisions on investments
- 26:01 Communication using EDI-Net Forum

2.4 Discourse forum

The discourse forum was introduced very early as the main landing page for questions and additional, easily searchable information. To date the forum has 131 users, over 2,600 posts in 361 topics. At the time of writing (December 2018) there were 17 'active' users having posted or liked a post in the last 30 days.

The forum provides EDI-Net users with a single platform for accessing training materials (alongside the website), allowing users to directly message team members with any questions resulting from the use of the services. The forum has the advantage of being very easy to use and allows users to post screenshots of the EDI-Net tools and team members to embed training videos and recordings of webinars.

Aside from internal discussion of bugs, features and next steps, the majority of recruited PPAs requested a private section only visible to their team members and the team members of EDI-Net, but not visible to other cities.

Not all PPAs use the forum. Those who do use the forum regularly have engaged deeply with the project. PPAs use the forum to engage with the EDI-Net project team on issues related to setting up their dashboards, feature requests and design issues as well as specific discussions relating to their own buildings and the analysis of their data.

2.5 Informal bilateral training sessions

Whenever a potential partner or already enlisted party contacted any of the partners, it has been attempted to start an interactive exchange using the EDI-Net tools. In some instances, shared screens were possible but in the majority of cases users have been guided through the online tools by simultaneously performing the steps of the discussion.

The aim was to avoid speaking about EDI-Net in generic terms but always making it specific to a circumstance so that the user can be helped and receive immediate feedback.

This activity includes any session on technical help when, for instance, a new PPA is starting to import data to EDI-Net and members of the technical team check upon data within the database in a live interaction and exchange. These kinds of meetings have not been documented or counted.

3   Conclusion

Training has been an integral part of recruiting PPAs as well as training them to utilise the services. Training starts well before the first day the system is available to a partner. It starts during the buy-in phase. Only by achieving an understanding of the tool with interested stakeholders was it possible to recruit additional municipalities.

For this purpose, EDI-Net also answered questions significantly outside the scope of the project, as municipalities could not rely on easily available information from their energy management service provider or metering operator.

The materials developed during the early phase of the project did not have to be overhauled, demonstrating a solid base. The original layout, content and structure were a success. The materials were gradually updated and extended. Additional, complementary materials were added over time. The introduction of videos and webinars in particular is a replication of written content in a much richer medium, providing audio-visual access to the functionality of EDI-Net, which in today's digital world is a must for attracting new users.

The online materials were used in on location training workshops. It must be stated that one form of training heavily relies on the other to achieve the full potential. EDI-Net succeeded in coordinating both streams of training.