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dialogues

Energy citizenship
for a sustainable future

D5.1

Online assessment tool for energy citizenship

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Revision History

VERSION	DATE	REVIEWER	MODIFICATIONS
1	**02.11.2022**	**Andrea Kollmann**	**Reviewing**

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1 Executive Summary

DIALOGUES (https://dialoguesproject.eu/) is a multi-disciplinary research project providing researchers, policymakers, and the general public with comprehensive information, data, and policy-ready recommendations about the successful transition to a low-carbon society.

In the course of this project, a Knowledge Platform is developed, which serves as the project's online tool for data exploration, exploitation and analysis. It is a multi-module ICT ecosystem where stakeholders will be able to follow, comment, support and query the progress of the project and interact with the project team.

The Platform will allow the download of data (and metadata) for researchers, data visualization and exploration for analysts and policymakers, and short data explanations and featured reports for the media and general audiences. It will also visualize aggregated data in the DIALOGUES monitor. This data will be collected through a web application, which is developed as the first feature of the ICT ecosystem.

The following report describes this application and provides the user with accompanying documentation and help texts.

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2 Overview

The development of the DIALOGUES assessment tool accomplishes the first stage of the multi-module ICT ecosystem of the DIALOGUES project.

- **Stage 1 – Data Gathering:** Web-based application with a survey tool to collect data and provide participants a guideline based on results.
- **Stage 2 – Data Storage:** Data monitor and storage unit following GDPR.
- **Stage 3 – Data Utilisation**: Knowledge platform as an online tool for data exploration, exploitation, and analysis based on the data collected with the assessment tool (T4.4).

The web-based application comprises two main parts:

1. Administration console to set up, control, and maintain the web application
2. Multi-language web application with surveys, news, articles, and personal user accounts.

Both frontend and backend are specifically tailored to the needs of the DIALOGUES project. The customized ICT system enables a smooth and transparent workflow and can be adapted to upcoming tasks and extensions, such as the DIALOGUES Knowledge Platform. All planned modules can be added seamlessly. This offers survey participants a convenient and credible user experience, as they can interact with the platform directly without intermediary platforms or obligations to share personal data. Personal data is only stored with consent and fully in line with GDPR provisions. The administration console is intuitive and clear and supports researchers in creating, managing and conducting surveys. Integrated tools allow the calculation of indicators used to create guidelines. These guidelines may be used to suggest pathways for participants' next steps toward deeper energy citizenship. Access to the administration console is restricted by username and password and can be granted on demand. The control panel currently consists of six modules to edit and maintain the web application and all contents.

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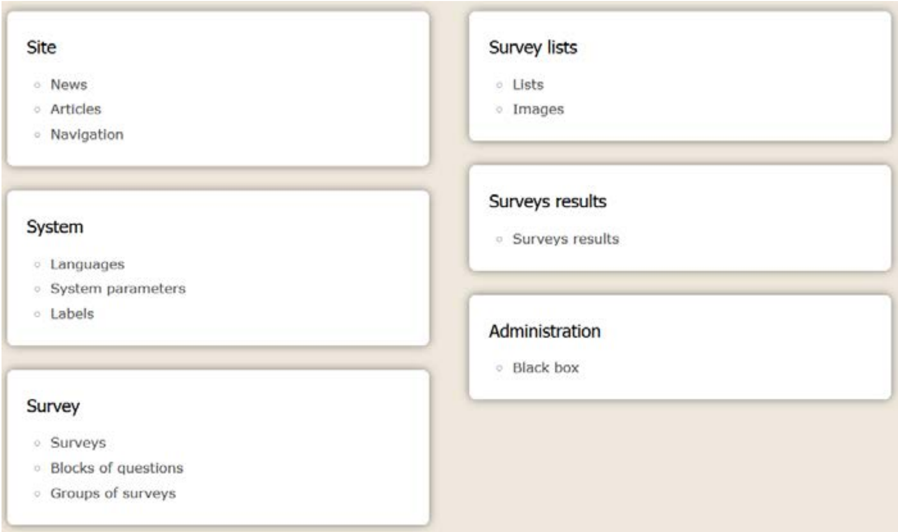

Figure 1:The six modules of the assessment tool

1. Site: define content on the web page
2. System: edit system settings
3. Survey: define surveys, questions, answers, indicators, and guidelines
4. Survey lists: define reusable list answers
5. Survey results: access and download survey answers
6. Administration: show logging of activities within the control panel

This report is accompanied by a handbook to guide users through creating and managing surveys within the administration console. The language of the administration console is English. The administration console allows users to enter the content in various languages. Languages can be added on the demand to the system. Currently, eight languages are supported. The web application consists of a set of pages with the main page as the starting page. All pages have a navigation panel. The adaptive layout provides an attractive appearance on most modern browsers, desktop computers, laptops, tablets, and smartphones.

The web application has the following structure:

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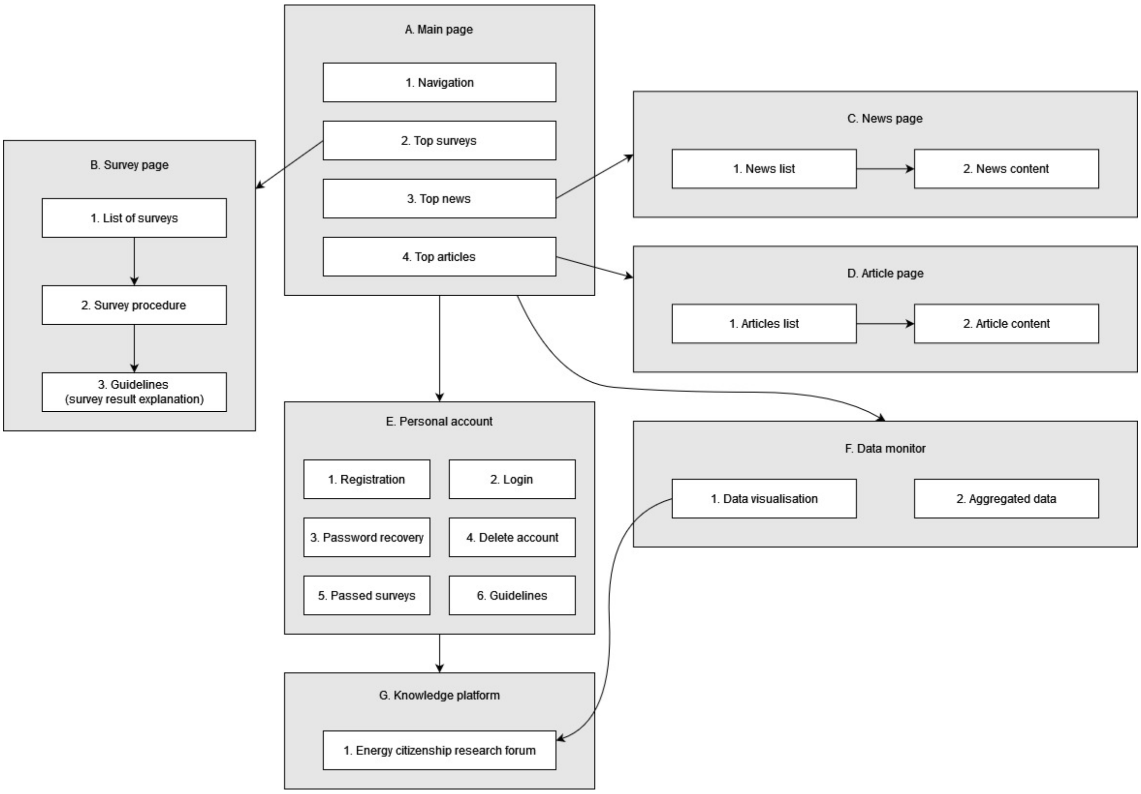

Figure 2: Structure of the web application

A. The main page consists of:
   1. Navigation (same on each page)
   2. Top surveys (list of most important surveys)
   3. List of top news
   4. List of top articles

B. The survey page consists of:
   1. List of surveys
   2. Survey page
   3. Page with guidelines (survey results' explanation).

C. There is a page with a list of all news (1) and pages with news content (2)

D. There is a page with a list of all articles (1) and pages with articles' content (2)

E. The web application has the following functionalities regarding user registration:
   1. Optional registration of a new user and login with the email address. The system will generate and send a confirmation link to the user's email address and generate a password after email confirmation

2. Login to the user's account using login and password
3. Password recovery
4. Option to delete the user account, according to GDPR
5. In the personal account, the user will see a list of completed surveys including the date of completion. For each completed survey the user will be able to see the guidelines (6) based on the survey results.

F. Data monitor (Stage 2, forthcoming development in the DIALOGUES project)

G. Knowledge platform (Stage 3, forthcoming development in the DIALOGUES project)

The workflow from the perspective of a survey participant is exemplified by the diagram below. The survey process will be:

A. The respondent can see a list of surveys and choose one of them.
B. It is also possible to take a non-public survey by sending/getting a URL.
C. The respondent chooses the desired language, reads the description, and starts the survey.
D. The respondent answers questions one by one.
E. Optional: The respondent can see the statistical results of the survey.
F. Optional: According to the respondent's answers, the system will build a list of pre-defined indicators.
G. The respondent can log in to the account or register.
H. The list of indicators will be converted into guidelines using predefined conditions. Guidelines can also provide general information not depending on survey answers.

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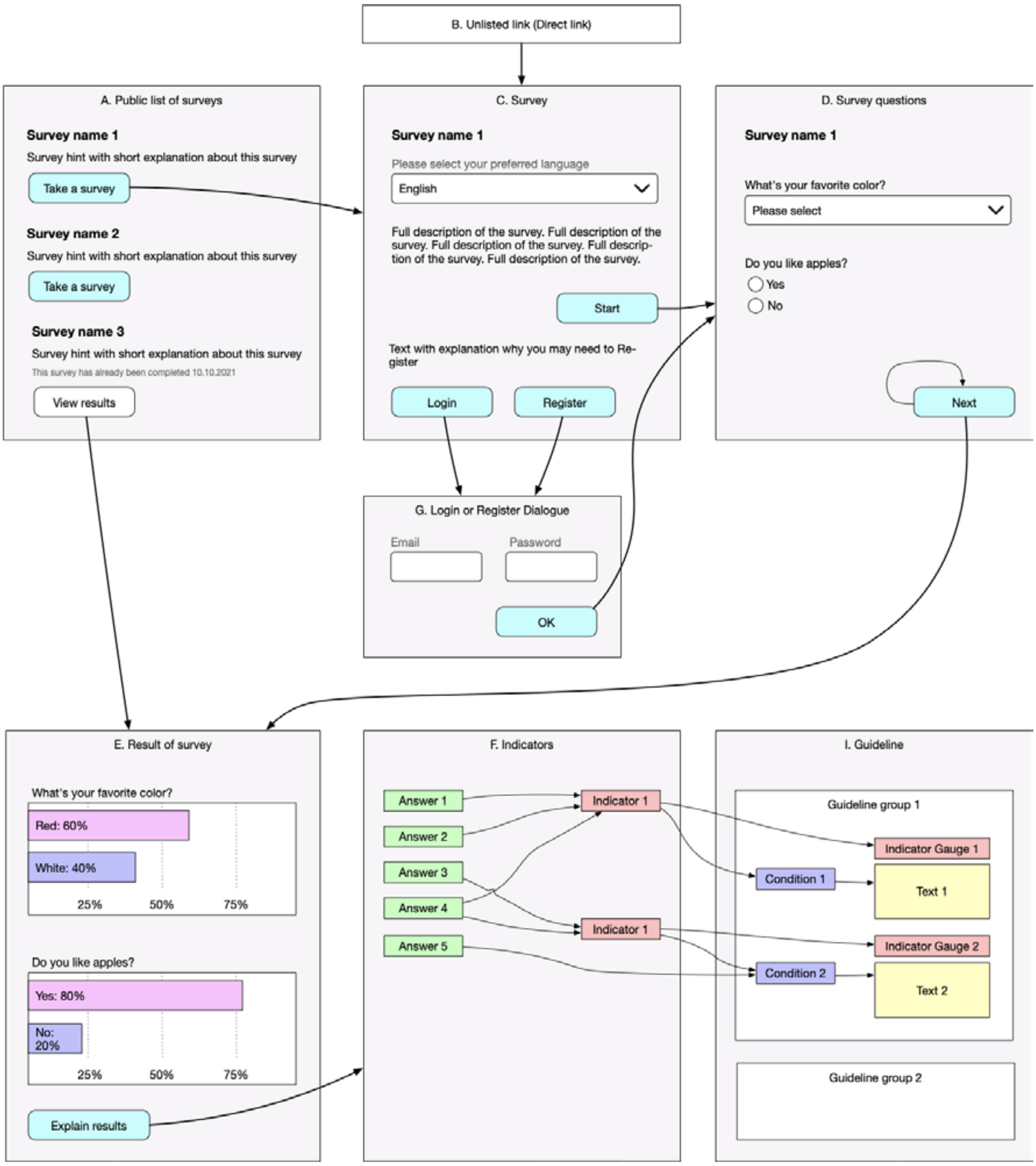

Figure 3: The survey workflow

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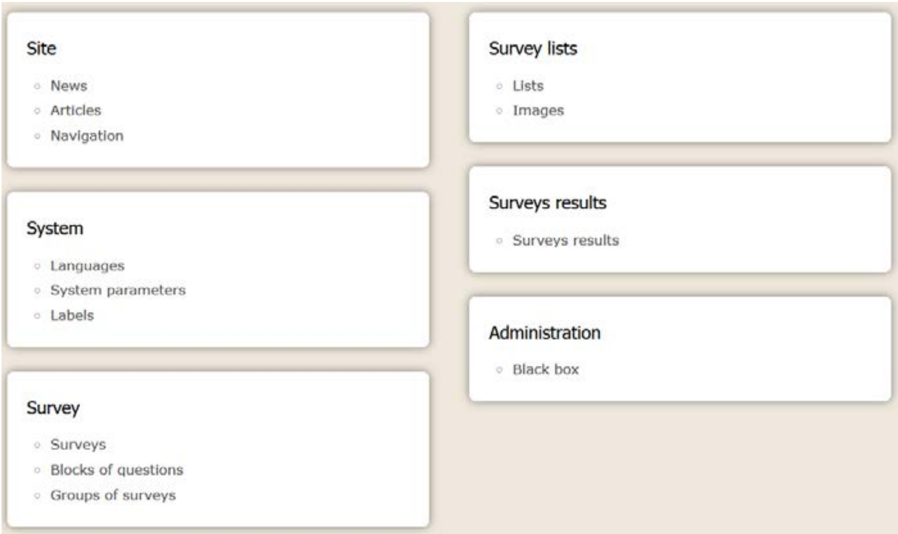
3 Handbook

This handbook guides through the functions of the administration console. It explains step by step the process of creating and managing surveys, questions, lists, and other important features.

3.1 Control Panel

Upon login, the following page is displayed, showing the applications six modules.



3.2 Create a new survey

1. Click **Surveys** in the Survey section on the **Control Panel.**
2. Select **Group** from the drop-down menu or create a new **Group** in the Survey section.
    a. If a new question category is added to the question pool, Group should be **Question**.
    b. Otherwise, groups can define arbitrary survey topics that include one or more surveys, e.g. Group **Recruitment**.
3. Click **Add survey** and enter the survey name. Select preferred settings.
4. In the **Operations** column,
    a. click **Edit text** to add a welcome text that is shown on the first page of the survey, or
    b. click **Edit stop text** to add a text that is shown if the survey is stopped before the end.
5. In the **Questions** column, click **edit** to add, edit or insert questions.
    a. **Add question:** New questions should be exclusively added to the question pool (Group **Questions**) to make them reusable. Depending on

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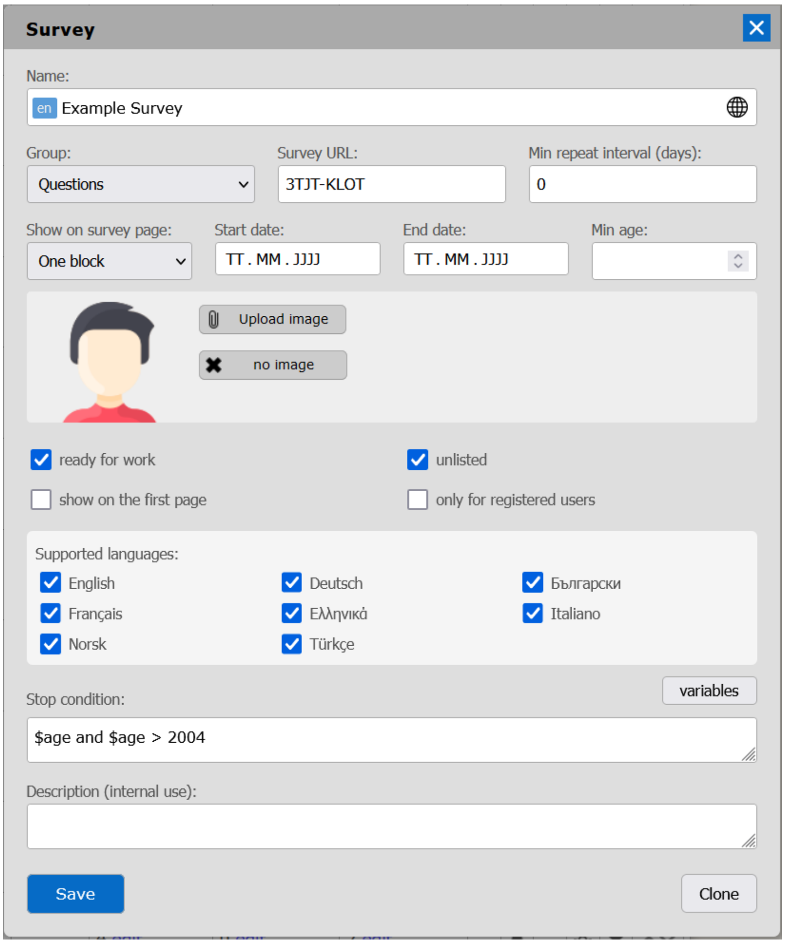
the question type, select or create a [list of answer values]() or select or add [images]().

   b. **Insert question:** Surveys should be created exclusively with questions from the question pool (Group **Questions**) by inserting existing questions.

6. In the **Indicators** column, click **edit** to add or edit indicators.
7. In the **Guidelines** column, click **edit** to add or edit guidelines (exit texts at the end of the survey).

3.2.1 Example

The following example demonstrates the steps of creating a new survey.



The demo survey is called **Example Survey**. It has no image but it is also not listed on the website and can only be accessed directly via its URL. A stop condition allows only participants born before 2005 to enter the survey. This requires a question within the survey where participants are asked their birth year. The variable must be called **age**.

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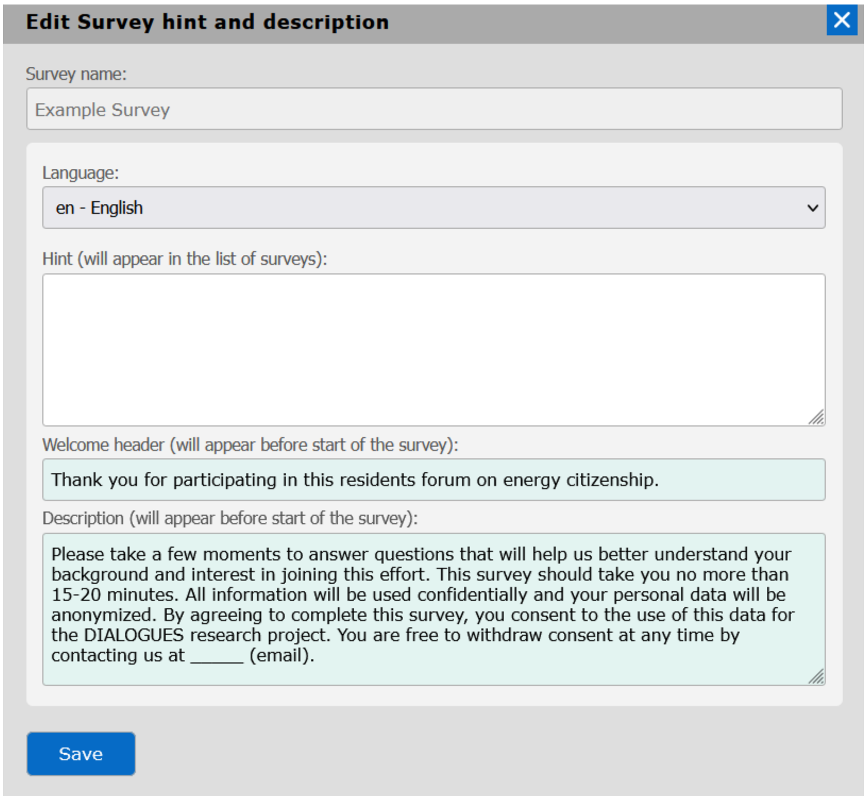
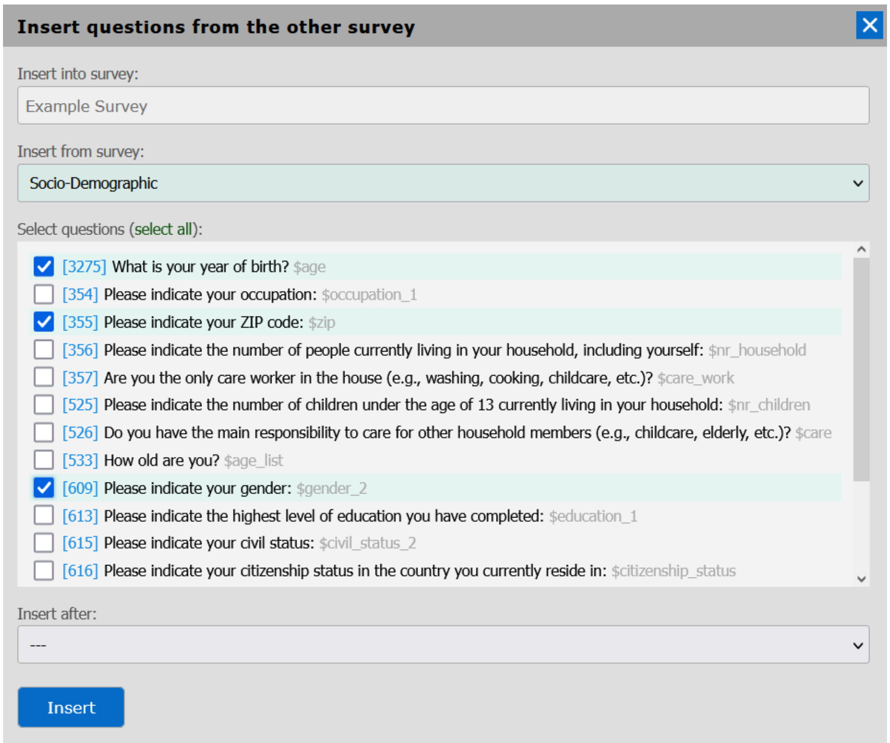
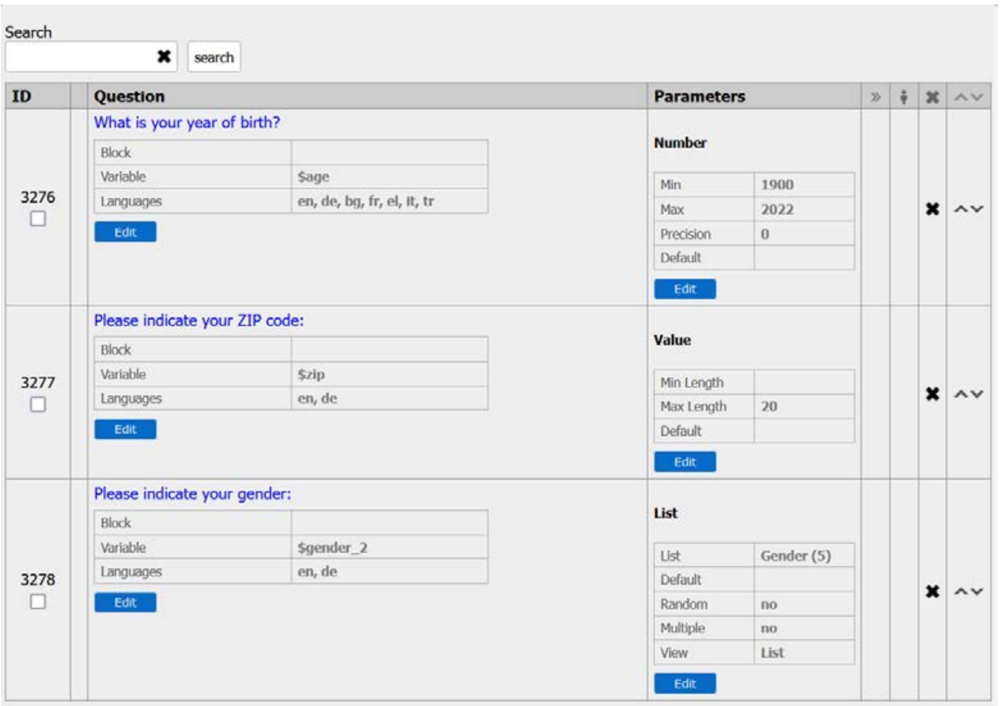


This text will be shown on the first page before a participant enters the survey.



To add questions to the survey, the recommended option is to import questions from existing surveys, preferably from group **Questions**.



Languages shows the language codes for which translations are available.

ID	Type	Text	Condition
167	Guideline header	Thank you for participating!	
168	Header text	Thank you for taking the time to complete the questionnaire. You can find out about the ongoing activities on the project website: https://www.dialoguesproject.eu/	

The guideline without condition will be shown to all participants that finished the survey.

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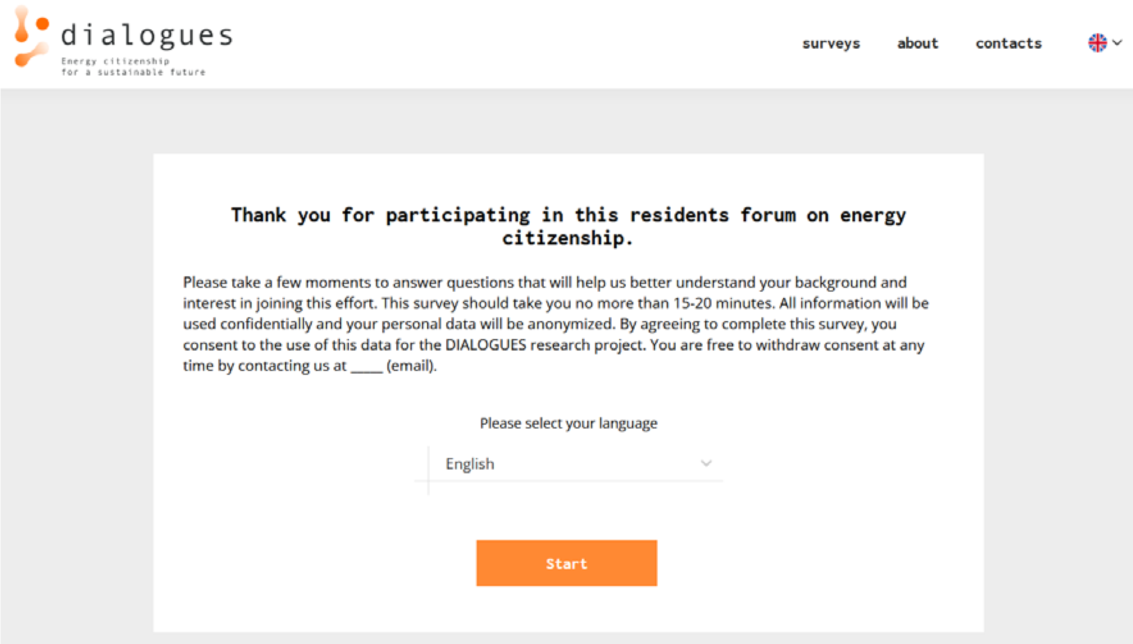
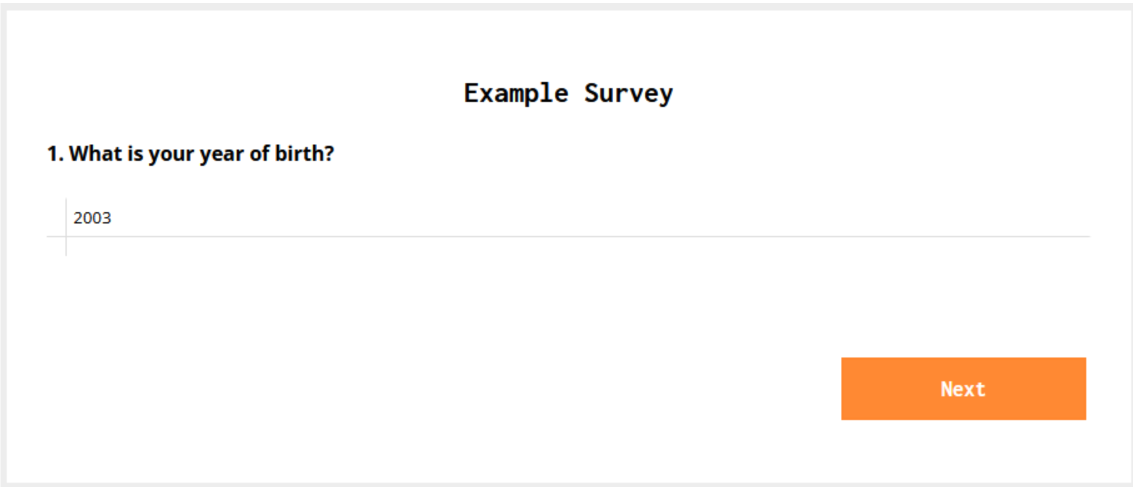
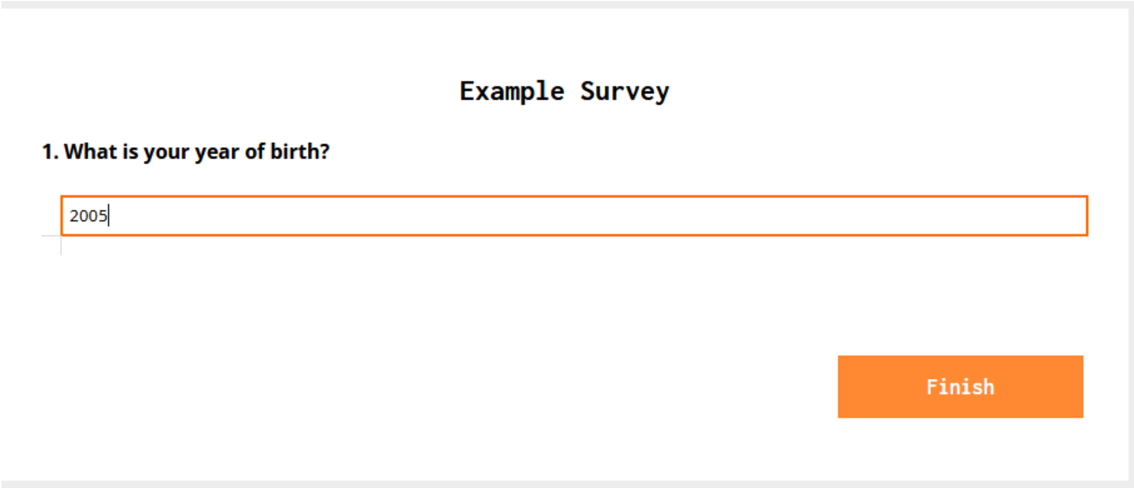


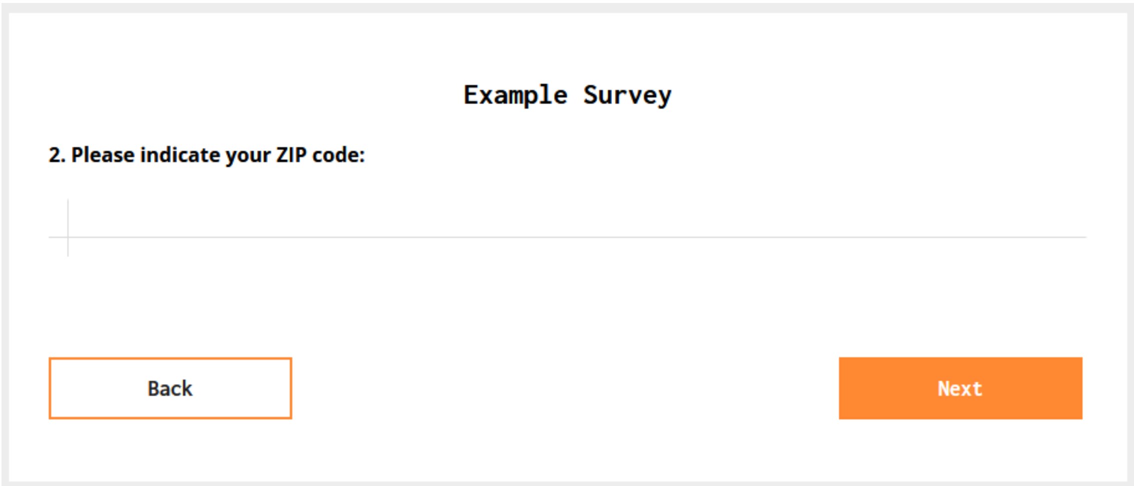
Accessing the survey via the direct link shows the start page of a survey where the language can be selected. To enter the survey, participants have to click **Start**.



This shows the first question. The birth year allows for entering the survey. By clicking **Next**, the following questions are shown.



If a participant enters a birth year that is excluded from the participation, the **Next** button is replaced by **Finish**.



The second question asks for entering a text. After entering the text, the participant can go to the next question. Clicking **Back** allows revising of previous questions.

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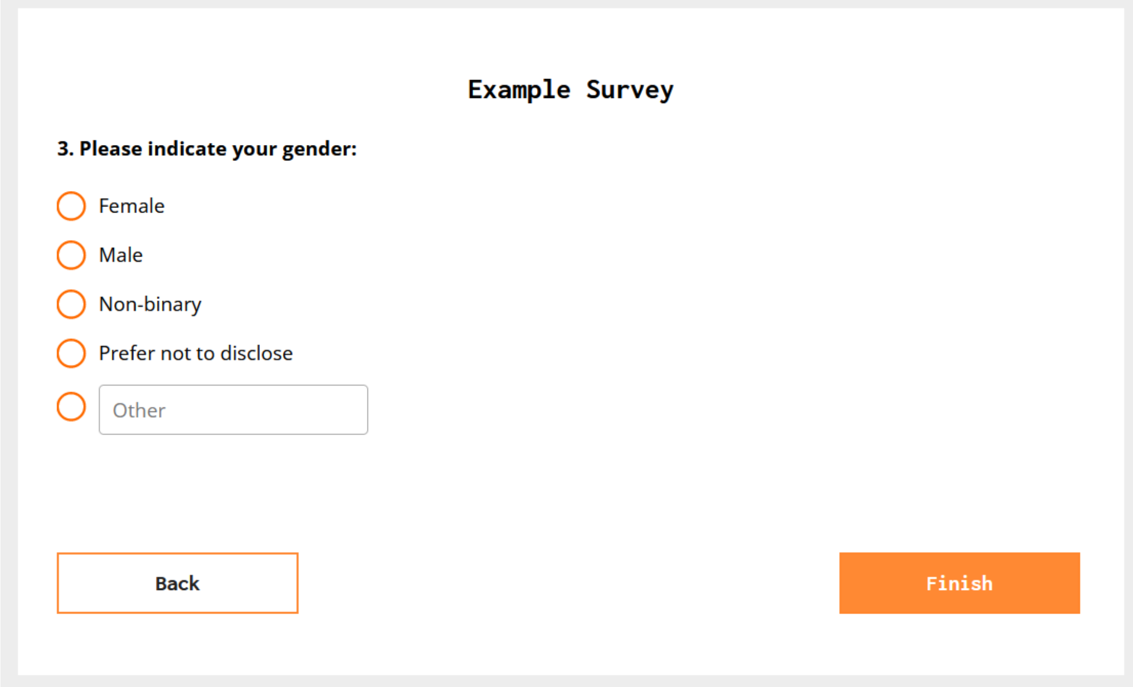
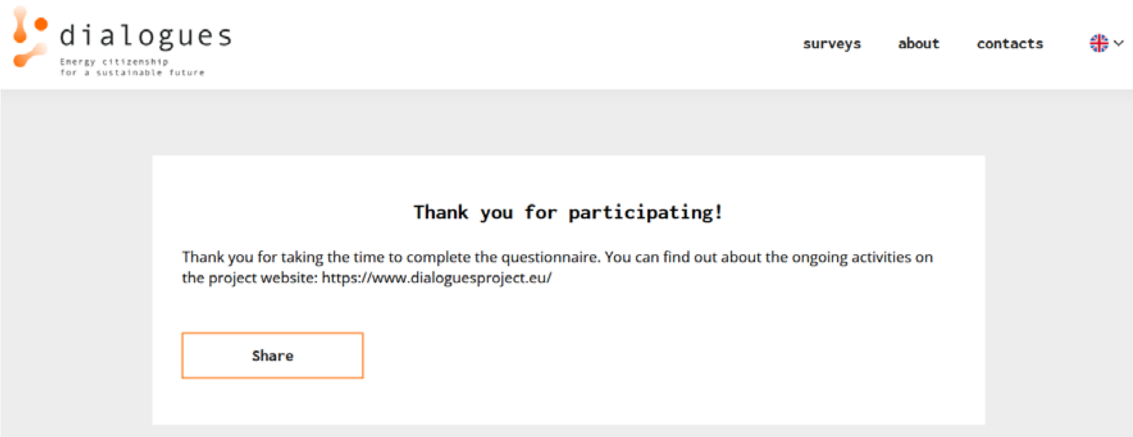


In the last question, participants can either choose an answer from the list or enter their text. By clicking **Finish**, the survey is completed.



This text will be shown to all participants that finished the survey.

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3.3 Survey

3.3.1 Surveys

3.3.1.1 Add survey

To add a new survey:

1. Enter the survey name. It should be somehow meaningful and recognizable to select it in **Survey Results**.
2. Optional: **Survey URL** specifies the subdirectory of the survey. It is auto-generated but can be modified.
3. From the **Show on survey page** drop-down menu, choose if either one question, a block of questions (matrix), or all questions should be listed on one page. For matrix questions, **One block** has to be chosen to show the underlying question for all subtopics. On mobile devices, matrix questions are not represented in table format for reasons of usability.
4. Optional: **Start date** and **End date** refer to the time span where the survey is available.
5. Optional: To check if the respondent's age qualifies for the survey, specify a minimum age in years in **Min age**. The respondents must enter their date of birth. A cookie allows to store the age and the question will only be asked if no date is stored.
6. Optional: Click **Upload image** to add an image or logo to the survey.
7. Optional checkboxes:
    a. **ready for work**: Tick if the survey can be shown on the website.
    b. **show on the first page**: Tick if the survey should be on the first page of the website's **surveys** section.
    c. **unlisted**: Tick if the survey should be hidden on the website. In combination with **ready for work**, the survey is available via its URL, but not displayed on the website.
    d. **only for registered users**: Tick if only registered respondents are allowed to take the survey.
8. Select **Supported languages**. By default, no languages are selected. For each selected language a translation should be provided, otherwise, respondents will see an empty survey if they select a survey without translation.
9. Optional: Add a stop condition.
10. Optional: Specify **Description** for internal use. This can be used for keywords, sources, etc.
11. Click **Add** to create the survey or click outside the window or at the top-right corner of the window to close it without saving changes.

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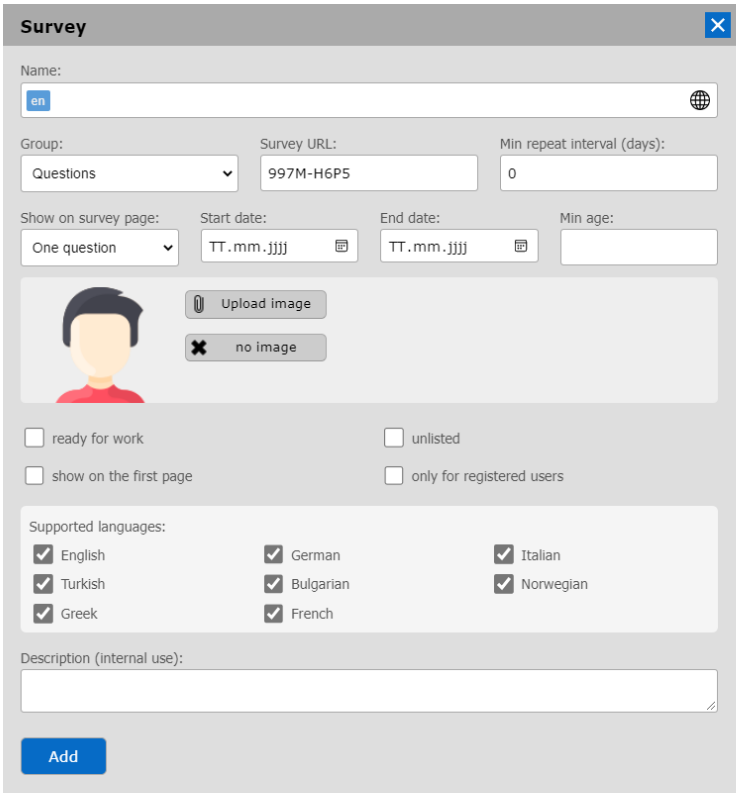

3.3.1.2 Clone survey

To clone a survey:

1. Click the survey name.
2. Click **Clone** and confirm.
3. The survey is cloned within the same group and can be modified independently of the original survey.

3.3.1.3 Operations

- **Edit text**
  Text in **Welcome header** and **Description** will appear before the start of the survey. Text in **Hint** will appear in the overview of surveys on the website, if the survey is listed.
- **Edit stop text**
  Text in **Stop header** and **Stop text** will appear when the survey is finished due to a stop condition.
- **Export**
  Export survey as csv. This is used to [translate](#) questions, hints, welcome header and text, stop header and text, and guidelines.

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- **Import**
  Import modified **Export** csv. Languages that should be modified (overwritten), have to be selected by ticking the respective boxes.
- **View**
  An overview of the survey including all questions and answers. It can be printed.

3.3.1.4 Questions

To add a new question:

1. Check if the question is already available in the question pool (Group **Questions**). If not, the question can be added as follows.
2. Click **Add question**.
3. Select **Type of question** from the drop-down menu.
4. **Language** is **en - English** by default. Optionally, select other languages from the drop-down menu. Tips for translating more efficiently can be found in Subsection **Translate**.
5. Enter survey questions into the **Question** text field**.**
6. Optional: Enter **Hint** to provide respondents with additional information.
7. Optional: Tick **participant can skip this question** to make the question optional. By default, answers are obligatory.
8. Optional: Select **Block** from the drop-down menu, if matrix form is required. The underlying matrix question has to be previously specified in **Blocks of Questions**.
9. Optional: The variable name will be auto-generated (random). If required, it can be renamed.
10. Next steps depend on the question types which are described in Subsection **Question Types**.
11. Click **Finish** to add the questions to the survey or click outside the window or at the top-right corner of the window to close it without saving changes.

To insert questions from existing surveys:

1. Click **Insert questions**.
2. From Group **Questions**: Select a survey from which questions should be inserted from the drop-down menu. Avoid inserting questions from other groups. Questions with the same variable name are highlighted. By inserting a question with the same variable name, the variable name of the inserted question receives a suffix (e.g. var1 and var1_1).
3. **Select questions** by ticking the boxes or choose **select all**. Questions are inserted in the order as shown. To rearrange the order, either insert questions in several steps or move questions after inserting them as described below.

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4. Optional: Select from the **insert after** drop-down menu after which question the selected questions should be inserted. By default, the questions will be inserted at the top of the survey.
5. Click **Insert** to insert the questions in the survey or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit questions:

1. Questions should be exclusively edited in the question pool (group **Questions**). Changes must be propagated manually to other surveys that include the edited question by newly inserting the question.
2. Click **Edit** in the **Question** column to change settings such as question text, hint, block, condition, etc.
3. Click **Edit** in the **Parameters** column to change parameter settings depending on the question type.
4. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete questions:

- Click the **X** next to the question to delete a question from the survey. **This is final and should be done carefully, especially in the question pool.** It is possible to delete multiple questions at once by ticking the box below the question ID. The **Delete** button will appear at the top right after at least one question is selected.

To move questions within the survey:

- Click the **up** and **down** arrows next to the question to move the question one step up or down.

To filter for questions:

1. Enter search text into **Search** text field and click the **search** button.
2. To exit the filtered questions, click **X** in the **Search** text field.

The filter works for all languages. It shows questions having some text in

- Question or
- Hint or
- Variable name.

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3.3.1.5 Question types

Type	Description	Preview
Number	Numeric value field. Specify a minimum and maximum value and the precision (0, 0.0, 0.00). Optionally, specify a default value and an error message.	**1. How old are you?** Please enter the number of years
Value	Character value field. Specify a minimum and maximum text length. Optionally, specify a default value and an error message. Multiple text fields can be created for one question.	**3. What is you name** Please provide full name
Yes / No	Binary choice. Specify text for yes and no answers. Optionally, select a default value.	**2. Are you married?** If you are divorced less then 1 month please answer yes yes no
List	Single or multiple choice with list or drop-down view. Select pre-generated [list of values](). Optionally, tick box for random order or add text field for an "other" answer choice.	**2. List with single choice** one two three
Images	Single choice of image. Select pre-generated [list of images](). Optionally, tick box for random order.	**5. Please select house of your dreams** Only once  

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Range	Similar to List but in horizontal format. Select a pre-generated list of values. For matrix question format, select the pre-generated question block and select **One block** in survey settings.	**1. In varius purus et molestie egestas. Vivamus lectus augue, commodo volutpat malesuada et, laoreet non arcu.** Vivamus lectus augue, commodo volutpat malesuada et, laoreet non arcu. Donec in ligula bibendum, viverra leo eget, vulputate enim ○ 1 ○ 2 ○ 3 ○ 4 ○ 5

3.3.1.6 Conditional skip/stop logic

Conditions allow adjusting questions that are shown next depending on the current answer.

To skip questions conditionally:

1. Click **Edit** in the **Question** column of the question that should be shown conditionally.
2. In the text field **Hide condition**, the logical condition, that leads to hiding the question, can be specified by using the variable name of the question that is shown before.
3. The condition depends on the question type and the possible answers. Use PHP syntax.
4. Click **Save** to apply the condition or click outside the window or at the top-right corner of the window to close it without saving changes.

To end a survey conditionally (similar to skipping questions as described above):

1. Click the survey name.
2. In the text field **Stop condition**, the logical condition, that leads to ending the survey, can be specified.

Note, that currently results that are finished before the end of the survey, are not saved!

In the following example, the question **How many children do you have?** will only be shown if the question **Do you have children?** will be answered with yes (logical TRUE).

ID	Question	Parameters
359	Do you have children? Block: Variable: $children Languages: en Edit	**Yes / No** Yes: yes No: not yet Edit
360	How many children do you have? Block: Variable: $qty Languages: en Hide condition: !$children Edit	**List** List: one-five Default: Random: no Multiple: no View: List Edit

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3.3.1.7 Indicators

Optionally, indicators can be used to create new variables for each respondent based on the answers, e.g. sum the values of a Likert scale of different responses to create a score. The results can be added to the **Guideline** that is shown to respondents at the end of the survey.

Indicators cannot be inserted from other surveys. They must be added to each survey individually.

To add a new indicator:

1. Click **Add indicator**.
2. Enter the indicator name into the **Name** text field.
3. Enter the variable name of the resulting indicator into the **Variable name** text field. Clicking the **variables** button shows all questions, variables, and indicators that are used in this survey.
4. Enter the formula of the indicator into the **Evaluation formula** text field. Use PHP syntax.
5. Settings such as minimum and maximum values and corresponding labels, colors, and a description can be added.
6. Click **Save** to add the indicator or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit indicators:

1. Click **Name**, **Variable,** or **ID** to change indicator settings.
2. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete indicators:

- Click the **X** next to the indicator to delete an indicator from the survey. **This is final and should be done carefully.**

To move indicators within the survey:

- Click the **up** and **down** arrows next to the indicator to move the indicator one step up or down.

3.3.1.8 Guidelines

Guidelines allow providing the respondents with additional information after finishing the survey. It can be used to present text or indicators.

Guidelines cannot be inserted from other surveys. They must be added to each survey individually. Texts will be shown to respondents in the same order as guidelines are arranged in the overview.

To add a new guideline:

1. Click **Add guidelines**.
2. Select **Type** from the drop-down menu. Types are described below.
3. Enter the indicator name into the **Name** text field.

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4. **Language** is **en - English** by default. To translate texts, export the survey according to Section Translate.
5. Optional: Enter a condition into the **Condition** text field. Use PHP syntax. This can be used to display guidelines depending on conditions.
6. Optional: Enter a description into the **Description** text field. This will not be shown to respondents.
7. Click **Save** to add the guideline or click outside the window or at the top-right corner of the window to close it without saving changes.

Guideline types:

- Guideline header
- Header text
- Block header
- Block text
- Indicator + guideline

To edit guidelines:

1. Click **ID** or **Type** to change guideline settings, or
2. Click **Clone** to clone a guideline within the current survey.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete guidelines:

- Click the **X** next to the guideline to delete an indicator from the survey. **This is final and should be done carefully.**

To move guidelines within the survey:

- Click the **up** and **down** arrows next to the guideline to move the guideline one step up or down.

3.3.1.9 Translate

It is strongly recommended to modify only questions from the question pool (Group **Questions**). This also refers to translating questions. Otherwise, consistency cannot be ensured.

There are two ways to translate questions:

- One by one:
  Translate each question by selecting the language from the **Language** drop-down menu.
- All at once (recommended):
  Export all questions at once as Excel file. After translating the questions in the corresponding language column, import the file again.

The first variant refers to editing questions and will not be explained explicitly.

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To translate questions (export - import):

1. In Group **Questions**, click **Export** next to the survey that has to be translated.
2. A window pops up. Click **Export** to download an Excel file.
3. Enter translations for required questions. Each column contains a language code. It is not necessary to translate all questions. Questions, where no translation is needed (yet) can be left out.
4. Save changes.
5. Import translation by clicking **Import** next to the survey.
6. Upload the modified Excel file.
7. Select languages that were modified.
8. Click **Import** to apply the translations or click outside the window or at the top-right corner of the window to close it without saving changes.
9. A window pops up that shows information about the imported rows.
    a. If everything went well, “No record found” is “0” and “Bad rows” is “no”.
    b. If a warning occurs, check some questions manually. The translation might be applied successfully. If not, retry importing the file and check the modified file for issues.

The following example shows several questions (FIELD TEXT) in English and German. The Italian translation is not yet available.

1	ID	ENTITY	FIELD	en	de	it
23	533	QUESTION	TEXT	How old are you?	Wie alt sind Sie?	
24	533	QUESTION	HINT			
25	609	QUESTION	TEXT	Please indicate your gender:	Bitte geben Sie Ihr Geschlecht an:	
26	609	QUESTION	HINT			
27	613	QUESTION	TEXT	Please indicate the highest level of education you have completed:	Bitte geben Sie Ihren höchsten Bildungsabschluss an:	
28	613	QUESTION	HINT			
29	615	QUESTION	TEXT	Please indicate your civil status:	Bitte geben Sie Ihren Familienstand an:	

To translate guidelines:

There are two ways to translate guidelines:

- One by one:
  Translate each guideline by selecting the language from the **Language** drop-down menu.
- All at once (recommended):
  Guidelines will be exported along with all questions in one Excel file. The procedure is the same as with translating questions. Make sure, that questions are not modified unless they are exported from the question pool and imported to the question pool.

3.3.2 Blocks of Questions

Matrix questions are created by assigning a block to questions in the survey. Blocks are globally defined. Any change affects all questions that refer to this block.

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To add a new block:

1. Check if the block is already available. If not, the block can be added as follows.
2. Click **Add block**.
3. Enter the block name as described above into the **Name** text field. This can be equal to **Question**. If the name/question is too long, it will be truncated.
4. **Language** is **en - English** by default. Optionally, select other languages from the drop-down menu. Tips for translating more efficiently can be found in Subsection Translate.
5. Enter the question into the **Question** text field.
6. Optional: Enter **Hint** to provide respondents with additional information.
7. Optional: Tick box for random order within the matrix.
8. Click **Add** to add the question block or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit a block:

1. For editing the block, click the block name at the overview of all blocks.
2. Edit the values as required.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete a block:

- Click the **X** next to the block name to delete the block. **This is final and should be done carefully.** A block cannot be deleted if it is used by a question.

To move a block:

- Click the **up** and **down** arrows next to the block to move the block one step up or down.

3.3.2.1 Translate

There are two ways to translate blocks:

- One by one:
  Translate each block by selecting the language from the **Language** drop-down menu.
- All at once (recommended):
  Export all blocks at once as an Excel file. After translating the blocks in the corresponding language column, import the file again.

The first variant refers to editing blocks and will not be explained explicitly.

To translate blocks (export-import):

1. Click **Export to Excel** above the overview of all blocks.
2. A window pops up. Click **Export** to download an Excel file.

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3. Enter translations for required blocks. Each column contains a language code. It is not necessary to translate all blocks. Blocks, where no translation is needed (yet) can be left out.
4. Save changes.
5. Import translation by clicking **Import from Excel** above the overview of all blocks.
6. Upload the modified Excel file.
7. Select languages that were modified.
8. Click **Import** to apply the translations or click outside the window or at the top-right corner of the window to close it without saving changes.
9. A window pops up that shows information about the imported rows.
    a. If everything went well, “No record found” is “0” and “Bad rows” is “no”.
    b. If a warning occurs, check some blocks manually. The translation might be applied successfully. If not, retry importing the file and check the modified file for issues.

The following example shows several blocks (FIELD TEXT) in English and German. The Italian translation is not yet available.

1	ID	FIELD	en	de	it
35	18	TEXT	Do you currently participate in any of the following activities?	Nehmen Sie derzeit an einer der folgenden Aktivitäten teil?	
36	19	HINT			
37	19	TEXT	To what extent do you agree with the following statements?	Inwieweit stimmen Sie den folgenden Aussagen zu?	
38	20	HINT			
39	20	TEXT	To what extent do you agree with the following statements about your own energy consumption habits?	Inwieweit stimmen Sie den folgenden Aussagen über Ihre eigenen Gewohnheiten beim Energieverbrauch zu?	

3.3.3 Groups of surveys

To add a new group:

1. Check if the block is already available. If not, the block can be added as follows.
2. Click **Add group**.
3. Enter the group name into the **Name** text field. There is no strict naming scheme but it is not allowed to call it **Questions**, because this is the name of the question pool.
4. Click **Add** to add the group or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit a group:

1. For editing the group name, click the group name.
2. Enter the new group name. There are no other settings.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

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To delete a group:

- Click the **X** next to the group name to delete the group. **This is final and should be done carefully. All surveys in this group will be deleted, too.** After deleting a group, the survey tool might be closed and re-opened.

To move a group:

- Click the **up** and **down** arrows next to the group to move the group one step up or down. This affects the order of groups in the drop-down menu in **Surveys**.

3.3.4 Sandbox

Throughout the survey tool, there are **Sandbox** buttons. Clicking the buttons allows inspecting different survey elements in a testing environment without generating data.

3.4 Survey Lists

3.4.1 Lists

Lists contain answer choices for **List** and **Range** questions that can and should be reused for different questions. There is no required naming scheme but to search for lists, list names should be meaningful and explanatory, e.g. for range choices, the marginal values should be used such as **never-very often** for list values never, seldom, occasionally, often, very often. For answer choices regarding gender, the list name could be just **Gender**.

By modifying list values, all questions, that use this list are modified. Modifying lists has to be done carefully or it might violate data integrity.

To add a new list:

1. Check if the list is already available. If not, the list can be added as follows.
2. Click **Add list**.
3. Enter the list name as described above into the **Name** text field.
4. Select **List type** from the drop-down menu. By default it is **List**. As both list and range question types accept both list types, this value does not need to be changed.
5. Select **Values type** from the drop-down menu. By default, it is Integer (e.g. 1, 2, 3, ….). String values could be used to enumerate alphabetically (e.g. a, b, c, …). The value is not shown to respondents but used for encoding finished surveys.
6. By default, all languages are marked as supported. It is not recommended to change this.
7. Click **Save** to add the list or click outside the window or at the top-right corner of the window to close it without saving changes.
8. Click **edit** in the **Values** column. The values column shows the number of elements in the list.
9. Click **Add value**.

10. Enter a value into the **Value** field. It is strongly recommended to choose sequential numbers. Duplicates are not allowed.
11. Enter labels to the language-specific label fields. Tips for translating efficiently can be found in Subsection **Translate**.
12. Click **Add** to add the answer choices or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit a list or list value:

1. For editing the list, click the list name at the overview of all lists.
   a. Edit the settings as required.
2. For editing a list value, click **edit** next to the list name.
   a. Click the desired value or label name.
   b. Edit the values as required.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete a list or list value:

- Click the **X** next to the list name to delete the list or click the **X** next to the list value. **This is final and should be done carefully.** A list cannot be deleted if it is used by a question.

To move a list or list value:

- Click the **up** and **down** arrows next to the list or list value to move the elements one step up or down.

3.4.1.1 Translate

Translating lists differs slightly from translating **Blocks of Questions** and **Surveys**. Lists are always modified one by one but it is also possible to export an Excel file, which is the recommended and more convenient way. The two ways of translating lists are:

- One by one:
  Translate each answer choice of a list by selecting the language from the **Language** drop-down menu.
- All at once (recommended):
  Export all answer choices of a list at once as Excel file. After translating the answer choices in the corresponding language column, import the file again.

The first variant refers to editing lists and will not be explained explicitly.

To translate lists (export - import):

1. Click **Export** next to the list.
2. A window pops up. Click **Export** to download an Excel file.
3. Enter translations for each answer choice. Each column contains a language code.

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4. Save changes.
5. Import translation by clicking **Import** next to list.
6. Upload the modified Excel file.
7. Select languages that were modified.
8. Click **Import** to apply the translations or click outside the window or at the top-right corner of the window to close it without saving changes.
9. A window pops up that shows information about the imported rows.
    a. If everything went well, “No record found” is “0” and “Bad rows” is “no”.
    b. If a warning occurs, check some blocks manually. The translation might be applied successfully. If not, retry importing the file and check the modified file for issues.

The following example shows several answer choices of a list in English and German. The Italian translation is not yet available.

1	ID	en	de	it
2	290	Female	Weiblich	
3	291	Male	Männlich	
4	292	Non-binary	Nicht-binär	
5	293	Prefer not to disclose	Keine Angabe	

3.4.2 Images

A list of images contains objects for question type **Images**.

To add a new list of images:

1. Click **Add list**.
2. Enter the list name into the **Name** text field.
3. Select **Values type** from the drop-down menu. By default, it is Integer (e.g. 1, 2, 3, ….). String values could be used to enumerate alphabetically (e.g. a, b, c, …). The value is not shown to respondents but used for encoding finished surveys.
4. Enter the pixel dimension of the images as they should be shown in the survey (**Width** and **Height**)
5. Click **Save** to add the list or click outside the window or at the top-right corner of the window to close it without saving changes.
6. Click **edit** in the **Values** column. The values column shows the number of elements in the list.
7. Click **Add image**.
8. Enter a value into the **Value** field. It is strongly recommended to choose sequential numbers. Duplicates are not allowed.
9. Upload an image.
10. Click **Add** to add the answer choices or click outside the window or at the top-right corner of the window to close it without saving changes.

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To edit an image list or an image.

1. For editing the list, click the list name at the overview of all lists.
    a. Edit the settings as required.
2. For editing a list value, click **edit** next to the list name.
    a. Click the desired value.
    b. Edit the value or image as required.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit an image list or an image.

- Click the **X** next to the list name to delete the list or click the **X** next to the list value. **This is final and should be done carefully.** A list cannot be deleted if it is used by a question.

To move an image list or an image.

- Click the **up** and **down** arrows next to the list or list value to move the elements one step up or down.

3.5 Survey Results

3.5.1 Survey Results

This module allows to view the survey answers of each participant and export the data for each survey as Excel file. Click the **X** to delete a participant's response.

3.6 System

3.6.1 Languages

Before questions and texts can be translated, the target language has to be specified within the system. After successfully adding a language, it will be available in the different sections of the survey tool.

To add a new language:

1. Click **Add language**.
2. Enter the language code and name (preferably in national language) into the corresponding text fields.
3. Upload an image of the country flag. It can be download from e.g. https://www.flaticon.com/search?word=country%20flag
4. Tick **- visible on the site** to make it available.
5. Click **Save** to add the language or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit a language:

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1. For editing the language code, language name, image, or visibility, click **Code** or **Language**.
2. Modify the settings.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete a language:

- Click the **X** next to the language to delete it. **This is final and should be done carefully**. All translations in all surveys will be deleted.

To move a language:

- Click the **up** and **down** arrows next to the language to move the language one step up or down.

3.6.2 System parameters

No alteration by the user is required.

3.6.3 Labels

System labels should be translated into all supported languages.

To translate labels:

There are two ways to translate labels:

- One by one:
  Translate each label by selecting the label and entering the text to the respective language field.
- All at once (recommended):
  Labels can be exported in one Excel file. The procedure is the same as with translating questions. Import the modified file without deleting rows or columns.

3.7 Site

3.7.1 News

News articles are shown in the **News** section on the website.

To add news:

1. Click **Add news**.
2. Add a date.
3. Add the subdirectory where the news content should be available.
4. Upload an image.
5. Select **Language** from the drop-down menu. Each translation must be entered separately.

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6. Add text to the fields. In the **Text** field, formatting is possible and links can be embedded.
7. Tick **show** to make it available.
8. Tick **show on the first page** to list it on the first page.
9. Click **Add** to add the news article or click outside the window or at the top-right corner of the window to close it without saving changes.

To edit news:

1. For editing news, click **ID**, **Date**, or **Header/Hint**.
2. Modify the article.
3. Click **Save** to apply the changes or click outside the window or at the top-right corner of the window to close it without saving changes.

To delete news:

- Click the **X** next to the news article to delete it.

To move news:

- Click the **up** and **down** arrows next to the news article to move it one step up or down.

3.7.2 Articles

Similar to news, articles are shown in the **Articles** section of the website. Articles don't have a date, otherwise the modules are equal.

3.7.3 Navigation

The navigation module manages the content structure on the website. This should usually not be modified.

3.8 Administration

3.8.1 Black box

This module shows the logs of all user activities within the control panel, e.g. adding or editing surveys.

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