



# Website user manual



#### **Table of contents**

1.	Pages			
2.	Posts4			
	2.1	Categories5		
3.	Events6			
	3.1	Creating an event6		
	3.2	Event Management7		
4.	Media8			
	4.1	Adding a media8		
	4.2	Media Library8		
	4.3	Editing a media9		
5.	Users and Roles11			
	5.1	Table of accounts11		
	5.2	Editing an account12		
6.	Menus13			
	6.1	Main menu13		
	6.2	Social media menu15		
7.	Forms			
	7.1	Templates16		
	7.2	Adding and ordering fields17		
	7.3	Setting a specific field17		
	7.4	Confirmations19		
	7.5	Notifications20		
	7.6	How to share your form?21		
	7.7	Entries23		
8.	FAQ with Betterdocs24			
	8.1	Adding new documentation24		
9.	Forum25			
	9.1	Creating a forum		
	9.2	Features26		
10.	C	ilossary (CM Tooltip Glossary)27		
11	Т	utorials 28		

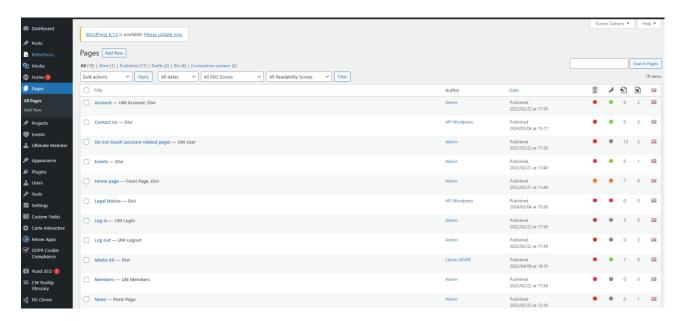


# 1. Pages

This section allows to manage all pages on your site. All pages are delivered in English by default. French is also available.

Through this section you can duplicate, edit, delete and view your pages. The filtering and searching functions allow to quickly find pages that meet your criteria.

A specific feature allows you to edit pages in bulk: the **Author**, **Parent**, **Template**, **Allow Comments**, and **Status** fields can be changed at once for a set of selected pages. The **Quick Edit** feature gives direct access to editing many fields on a page in the list, such as **Title**, **Slug**, **Date**, and **Author**.



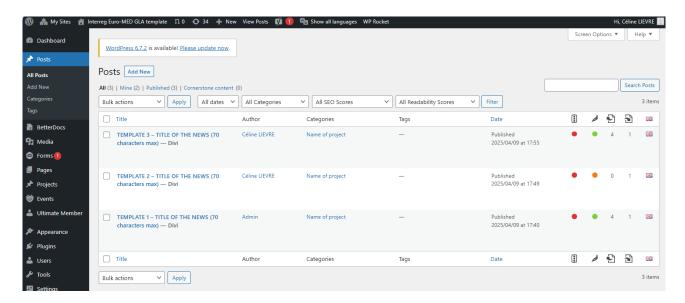
More information on: https://wordpress.org/documentation/article/pages-screen/



## 2. Posts

This section allows to manage all the news of the website. Posts can be duplicated, edited, deleted and viewed. The filtering and searching option allow to quickly find articles that match certain criteria.

<u>NB</u>: It is possible to edit items as a group. It is important to note that categories and tags can be added contemporaneously to a selection of articles, but it is not possible to edit, or delete, a category or tag for these articles. In addition, the Quick Edit feature allows you to modify multiple values, such as **Title**, **Slug**, **Date** and **Categories**, for a given item.



More information on: https://wordpress.org/documentation/article/posts-screen/

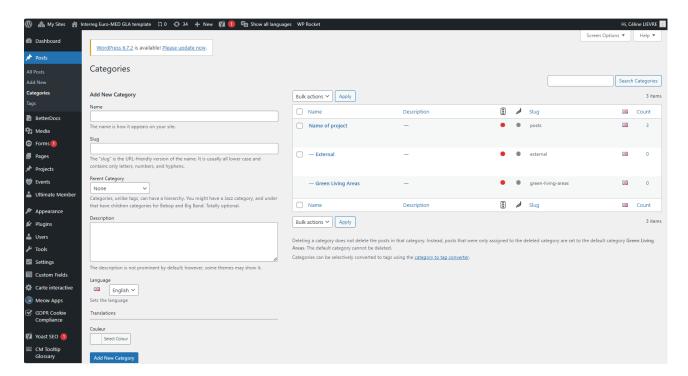


# 2.1 Categories

Each post in WordPress is categorised into one or more categories.

This facilitates navigation between articles and allows them to be gathered into a common topic.

Links to your categories can be displayed in multiple places, namely on a sidebar. They will also be mentioned in the related articles. When someone clicks on one of these category links, he/she will be redirected to an archive page displaying all the articles under this category.



More information on: <a href="https://wordpress.org/documentation/article/posts-categories-screen/">https://wordpress.org/documentation/article/posts-categories-screen/</a>



### 3. Events

Source: https://wp-events-plugin.com/documentation/

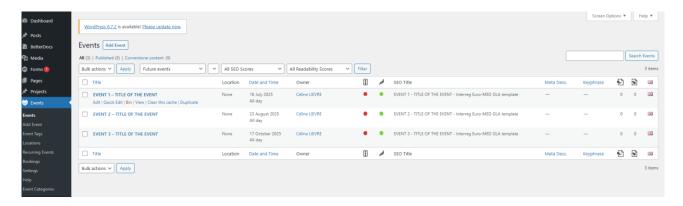
## 3.1 Creating an event

Go to **Events > Events** and **duplicate one of the templates**. Then, give your event a name and enter the date and time of the event.

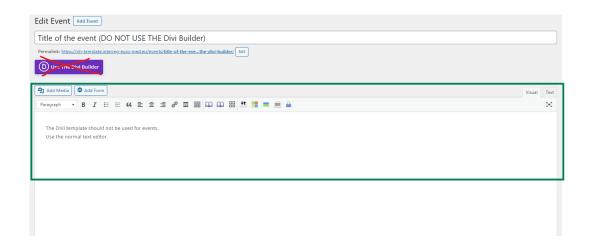
Add a venue for your event: If your event is online or doesn't have a venue, check the box next to "The event doesn't have a physical location."

If you have a physical location, enter the address. When you add your information, a Open Street Maps map will automatically appear and display the information.

It is also possible to attach a Form in the event view to have an advanced form for registration. Note that with an advanced form, it will not be possible to consult the reservations made in the reservation page.



**NB:** The DIVI template should not be used for events. Use the normal text editor.





## 3.2 Event Management

The event administration page is where you can view all system events.

The default view is displaying FUTURE events, which means that some events may be "missing" if they are past events. You can view past events or all events by selecting the correct scope from the filter drop-down menu above the events table.

From this page, you can also access the event booking page, delete and duplicate events.

Editing an event is like adding an event: You can edit it by finding it on the event list page in your admin area (click the Events menu item) and clicking the event title.



## 4.Media

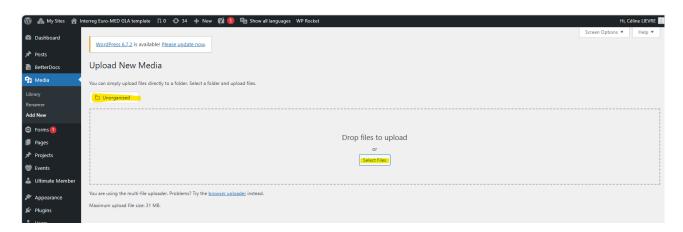
# 4.1 Adding a media

The **Upload Media** section allows you to upload media (images, videos, files, etc.) to use in your posts. You can upload one or a group of items to your **Media Library**.

You can access this section from the **Dashboard**, by clicking on the **Media Library** menu or by clicking the **Add** button.

Uploading a media from your computer to the **Media Library** is quite simple. Two methods are available: multifile upload and browser method: Multi-file upload is the one by default through drag and drop from your dossiers, but if it doesn't work, you can click on the **browser's method** link.

You can preselect a media folder to automatically organise your newly imported files using the folder selection at the top left of the import area.



More information on: <a href="https://wordpress.org/documentation/article/media-add-new-screen/">https://wordpress.org/documentation/article/media-add-new-screen/</a>

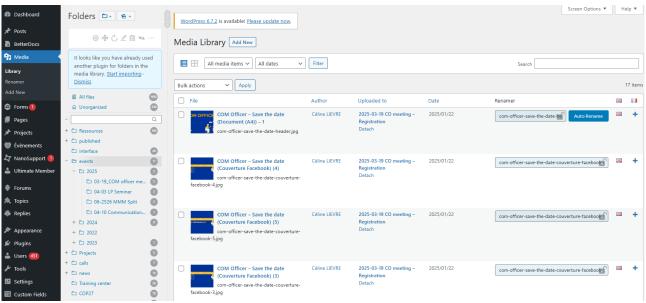
# 4.2 Media Library

This section allows you to edit, view and delete media previously uploaded to your site. Multiple media can be selected for grouped action. The searching and filtering feature also allows you to find the media you are looking for.

The media library offers two types of views: One is a simple visual grid and the other is a conventional list view. You can switch between these views using the icons at the top left of the **Media Library** section.



The left part of the screen presenting a hierarchy of the different folders of your media library allows you to organise your files with folder editing and move between via drag and drop.



More information on: https://wordpress.org/documentation/article/media-library-screen/

# 4.3 Editing a media

This section allows you to manage information of a media that has been saved in the library. To reach this section, go to **Dashboard>Media>Media Library** and then click on the name of the media or the **Edit** link that appears under its name. You can also access this page by clicking the **Edit** link when adding new media.

The data entered on the **Edit Media** section is often used by attachment pages and galleries if the theme or extension is used to display it. This data is also used as the default values when an image is inserted into a publication. After the image has been inserted, it is disconnected from the media library data, and you can use the **Attachment Details** screen to edit its metadata only in that publication.

For images, in addition to metadata such as **Title**, **Caption**, **Alt Text**, and **Description**, you can modify your image (rotate, scaling, and cropping) from this screen.

**Good practice**: to increase the visibility of the media on a search engine (e.g. Google), it is recommended to name the file with keywords for good referencing.





More information on: <a href="https://wordpress.org/documentation/article/edit-media/">https://wordpress.org/documentation/article/edit-media/</a>



## 5. Users and Roles

The **Accounts** section allows you to manage, add, edit or delete the accounts of users of your site. You can also perform bulk actions to edit or delete a group of accounts.

An account contains all the users - registered on your site - information with different roles.

The Accounts section is accessible from the **Accounts menu**, then **All Accounts** in the **Dashboard**.

**Important**: All accounts created on the Interreg Euro-MED WordPress platform can be linked to project sites. Therefore, if a person already has an account for the project X site, the administrator of the project Y site will not need to create his account but only to give him access to his own site. A user may have different roles / access depending on the site (e.g. if he is an administrator of the project X site, he may be a simple subscriber of the project Y site).

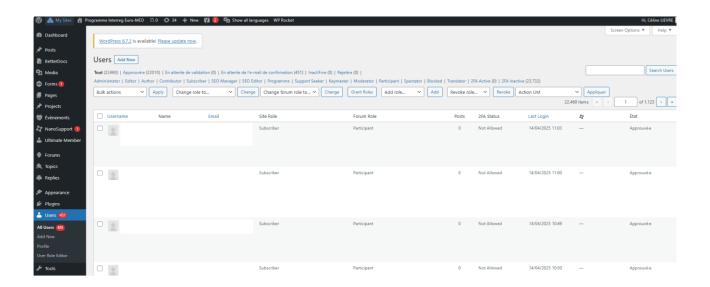
#### 5.1 Table of accounts

The main part of the **Accounts** section displays a table of all accounts, listed alphabetically by ID.

The table of accounts contains the following columns:

- Check box Select this check box if this account will be affected by the **Delete** or Change Role actions. There is also a checkbox in the column header to the left of the ID text: click this checkbox to select all accounts.
- **Account Image** The avatar linked to this account.
- Login The identifier of the account. To edit an account, click on the ID link, the Edit Account screen will then appear so that you can make the desired changes. Also note that if you hover over anywhere on an account line, the Edit and Delete links will appear and can be used. For the currently logged in account, the Remove link is not displayed.
- Last Name The first and last name linked to the account.
- **Email** The email address of the account.
- Site Role The role assigned to this account for site management.
- **Forum Role** The role assigned to this account for managing the forum.
- **2FA Status** The status of two-factor authentication if enabled.
- **Publications** The number of publications (articles) associated with this account.
- **Status** The current state of the account. When creating an account, the user must confirm his account in the confirmation email received on the email address entered.





## 5.2 Editing an account

When you click on the **Edit** action, the **Edit Account** section appears. This section allows you to set **Personal Options**. Once you have set your account, click on the **Update Account** button.

Withdrawing an account

It allows you to delete an account from the current site: you will need to confirm this action.

When the process has been completed, you will be redirected to the **Accounts** section and a notification will appear at the top of the screen showing the number of accounts withdrawn.

#### **Password reset**

The **Password Reset** action is an immediate or bulk action that sends each account owner an email with a link to set a new password. When the action is applied or clicked, a notification is displayed with the following message: "The password reset link has been sent to  $_{xx}$  accounts".

More information on: https://wordpress.org/documentation/article/users-screen/



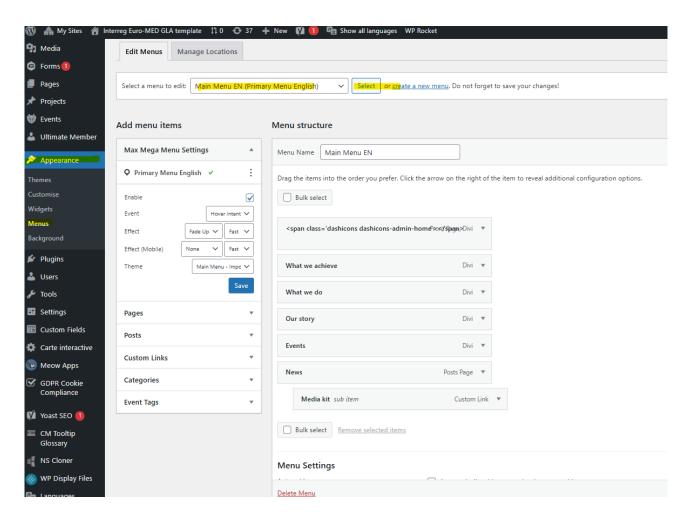
## 6. Menus

#### 6.1 Main menu

The main menu must not be modified. The menu "What we achieve" can only be hidden at the beginning of the project until the project uploads some deliverables at a later stage.

#### (i) Adding secondary pages to the main menu

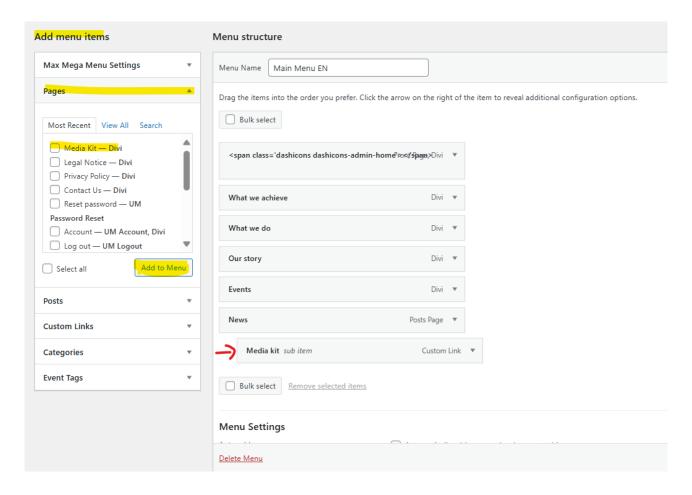
To add a secondary menu in your main menu, go to **Appearance > Menus** and select the **"Main menu EN".** 





Go to the "**Add menu items**" and search for the page you want to add. The page will be added to the menu on your right.

Drop it slightly to the right so to offset it.

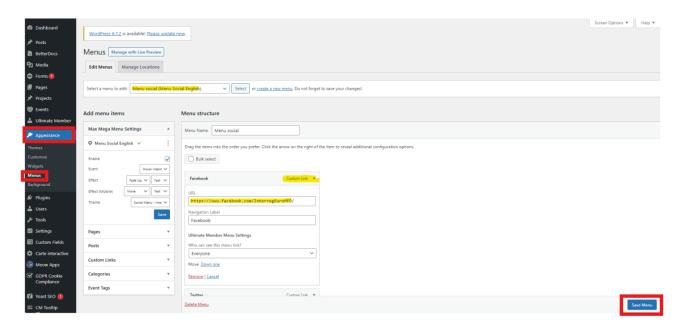




#### 6.2 Social media menu

To add your social media accounts to the social media menu, go to **Appearance > Menus** and select the **"Menu social (Menu Social English)".** 

You can **custom the links** of each media or **remove the media** your project is not using.



**Don't forget to save the changes** clicking on the "Save Menu" button at the bottom right of the page.



## 7. Forms

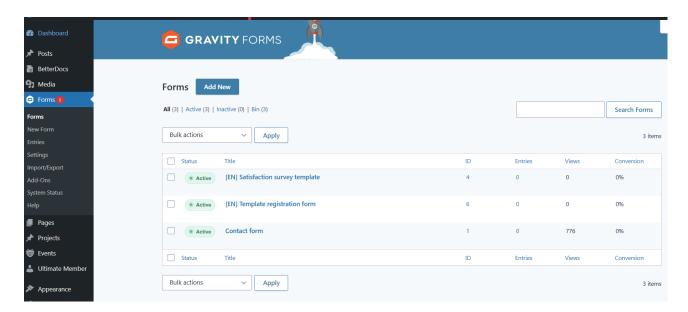
Full documentation: <a href="https://docs.gravityforms.com/">https://docs.gravityforms.com/</a>

## 7.1 Templates

You will find two templates directly in your website:

- 1. A registration form
- 2. A satisfaction survey

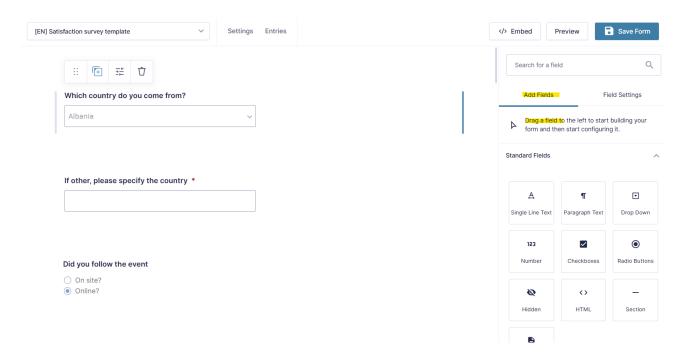
From the forms list (in the left hand navigation area "Forms > Forms"), you can see the **templates** in English language. You shall **duplicate** the selected form to use it, and then modify or edit the settings.





## 7.2 Adding and ordering fields

Here, you will have to draw from the elements available on the right by clicking on them or dragging and dropping them to the editing area. Then you can rearrange them in the same way. You can arrange the fields on several columns (up to 4).



To **edit a field**, simply click on it to display the settings.

You will also be able to click on the icon of the two sheets to duplicate a field.

The next pictogram also leads to the field settings. Click on the cross to delete a field.

A pop-up window will then appear to confirm the action.

Finally, you can update all the changes you have made using the "**Save form**" button at the top right of the screen.

# 7.3 Setting a specific field

When you open the settings of a field, you will have access to 3 different tabs: *General*, *Appearance* and *Advanced*.

You will very often have options specific to the type of field you have selected. Thus, the settings of the *drop-down control* are not at all the same as those of the *Section* control.

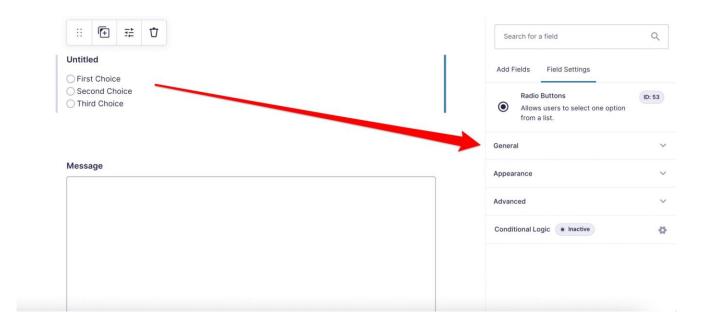


#### (i) General Section

This section allows you to modify the label of the control (the one that will appear on the screen) and add a description.

Specific options are available for each type of field. It is possible to specify the items in the drop-down list (cf. screenshot below).

Finally, the "Necessary" box set a field as mandatory.



#### (ii) Appearance section

On the Appearance section, several options are available:

- **Custom CSS class**, allows to display the different components of your forms. To change these options, you need to know the CSS classes of Gravity Forms.
- **The size of the section** is also a recurring element. Here you can define whether a field is small, medium (default) or large. This will impact its width.

#### (iii) Conditional logic

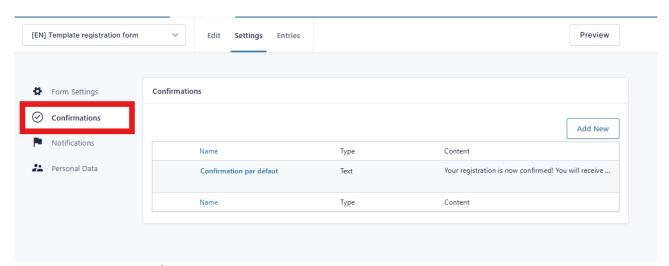
It allows you to display fields only if some conditions are met so:

- You can tailor the level of details you want based on your visitor's choices;
- You can have a tailor-made form, without unnecessary fields, while remaining "simple" at first. It is only if certain conditions are met that additional fields appear.

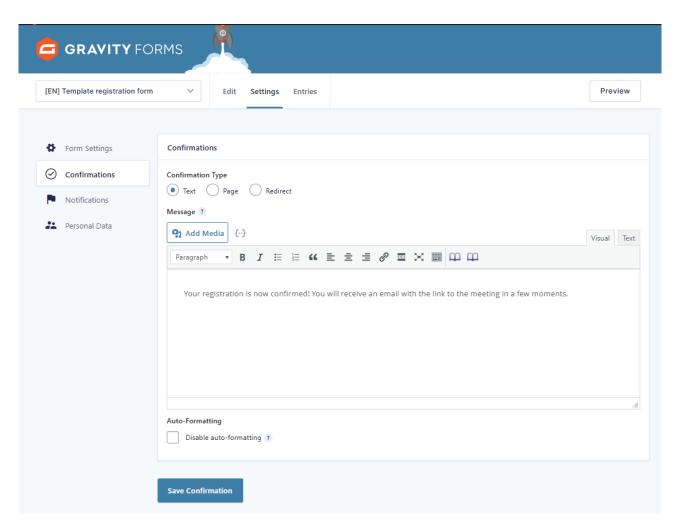


#### 7.4 Confirmations

A confirmation is the message that appears after the user clicked on the "Submit" button at the end of the form.



You can **customise/edit** the existing template directly.



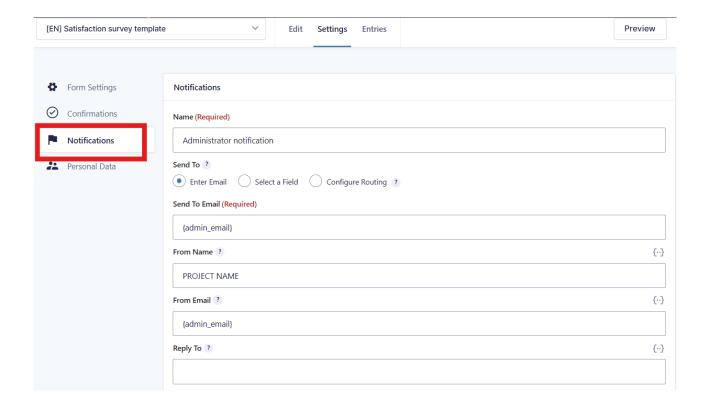


#### 7.5 Notifications

A notification is an email sent to the user that just filled in the form and/or an email sent to the administrator to be informed that a new person filled in the form.

You can **create** several notifications: one for the visitor who has just filled in the form and one for the administrator, author of the form, to inform him that he has received a response. Conditional logic options allow you to multiply the number of possibilities for sending notifications.

We then have at our disposal all the parameters to compose the notification email. The subject of the email, the sender, the recipient, possible people in hidden copy.





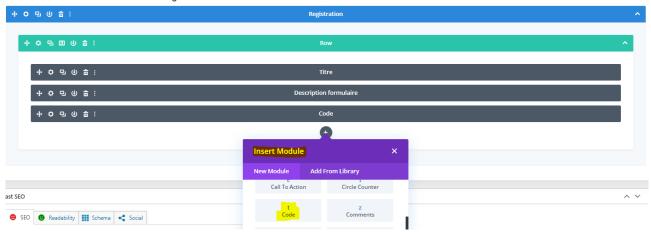
## 7.6 How to share your form?

You can share your form through 2 options:

- 1. Creating a page and then share the webpage url (as the JS does)
- 2. Adding your form directly in your "event".

#### (i) Creating a page

Once your page has been created (in the Page menu), insert a Code module with the "reference number" of your form:



- Add the code: [gravityform id="121" title="false" description="false" ajax="true"]
- Put the ID number of your form that you will find in your form details:

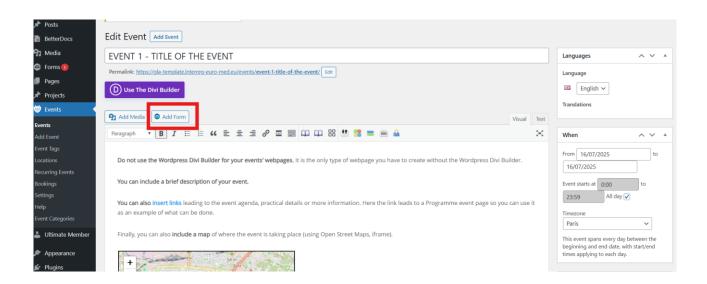


• Publish your page and share the page url to your participants or add it to a button.

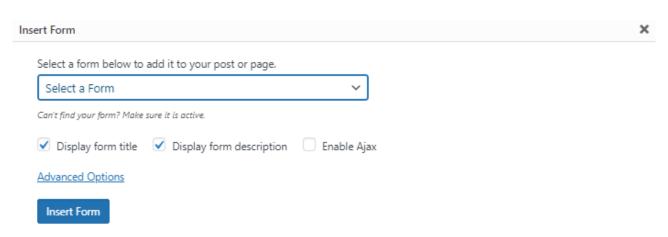


#### (ii) Adding the form to an event

- Go to the left hand navigation menu to **Events** and select or add one event.
- Click on the button Add Form:



• Select your form from the list:

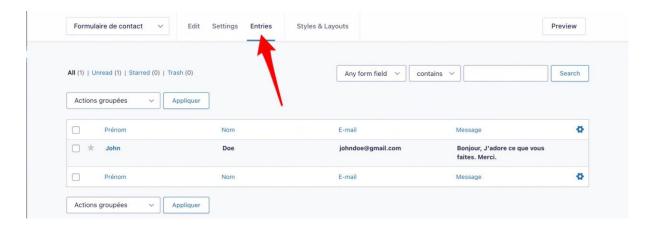




#### 7.7 Entries

You can see all the entries you have received in the same menu:

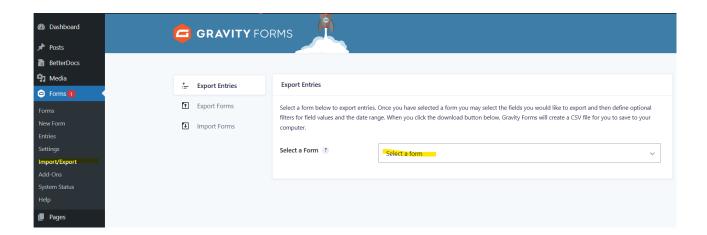
Go to **Forms > Entries** and find the list of all submissions. You can then change the form thanks to the drop-down list at the top left (on the example, *Formulaire de contact*).



#### (i) Exporting entries

Go to **Forms> Import/Export > Export Entries**, and select a form to export the entries of all your forms to a .csv file (importable in Microsoft Excel).

You can export all or part of each entry by selecting the different fields via checkboxes.





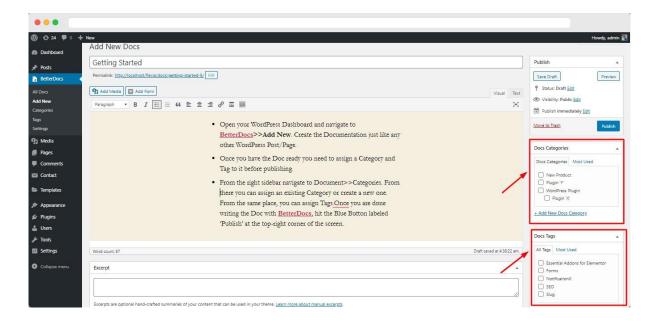
# 8.FAQ with Betterdocs

## 8.1 Adding new documentation

Open your WordPress dashboard and go to **BetterDocs>> Add New**. Create the documentation just like any other post or page.

Once the document is ready, you must assign a category and tag to it before publishing it.

In the sidebar on the right, go to **Document>>Categories.** From here, you can assign an existing category or create a new one and then assign tags.



More information on: https://betterdocs.co/docs/



## 9. Forum

NB: This option has to be added by the Joint Secretariat upon request.

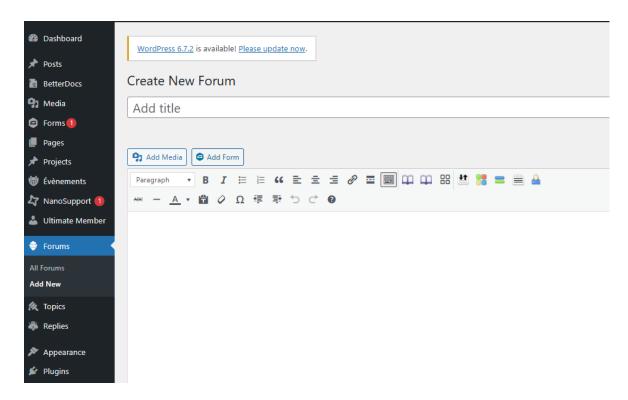
In general, forums are great for creating unique, interactive content and engaging users with your site. They also offer the possibility to optimise your website for search engines (e.g. Google) with keywords.

## 9.1 Creating a forum

The forums are arranged in a tree-like manner: they always start with a forum called "Forum" from which all your sub-forums will flow.

In the navigation bar select **Forums > New Forum**.

Give your forum a name and enter a short description in the text editor. Set the status to **Closed** to make sure no one can post a new topic in your main forum. Since this will only serve as an index for the different sections of your forum, you don't want anyone to post a message there. Once you're done with the first few settings, click **Publish** to create your main forum.



The number of forums you create depends entirely on your goals and needs. You can easily view multiple sections for your users to view.

Users will be able, for each open forum, to create topics and then reply to them.



In this example below, forums are there to provide help and support to customers, so ideally the forum setup will include an FAQ section, as well as individual forums to answer specific questions about a product, service or other.

Ordinateurs Tout ce qui touche nos machines Apple	0	0
─ MacBook Pro	0	0
☐ — MacBook	0	0
☐ — MacBook Air	0	0
Smartphones Toutes les questions relatives a nos chers iPhone	0	0
☐ — iPhone 7	0	0
☐ — iPhone 8	0	0

#### 9.2 Features

Your forum has several features:

**The status** of any forum you create can be open and closed. A closed forum means that anyone can see the forum but cannot post new topics on it. Open status means that any registered user with the required rights can post a new topic.

You can set the type of **visibility**: "**public"** means that even unregistered users can see the forum; "**Private**" means that only registered and logged in users can see the forum; and "**Hidden**" means that the forums can only be seen by administrators and key masters.

**The ranking** simply sets the order in which your forums will appear on the main forum page. The default ranking is alphabetical, but you can change it using this attribute. It starts at 0 and can go as high as you like.

As for **topics**, they can be normal, "**sticky**" which means that they stay at the top of the forum regardless of the number of new topics added, and finally "**super sticky**", where the same topic is displayed at the top of each forum.

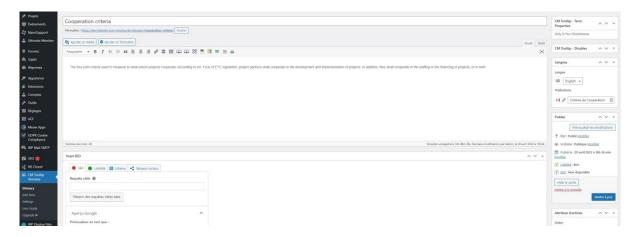


# 10. Glossary (CM Tooltip Glossary)

CM Tooltip Glossary allows you to create a site with a complete glossary of terms. The definition of each term can appear when hovering over the mouse throughout the site. Head to **CM Tooltip Glossary > Add New**.

The title of the term is the word or sentence that, when on the post/page, will display the tooltip with the hover definition, and a link to the Term page or any other custom link according to the settings. Terms with a definition will have a colour and underline distinguishing them from the rest of the content.

The editing and management of these terms can be done in the same way as the article management described earlier in this document.





# 11. Tutorials

We created these <u>tutorials</u> on YouTube to help you build your website. We highly encourage you to watch it.

