



**Interreg**  
Euro-MED



Co-funded by  
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# Website user manual

[Interreg-euro-med.eu](http://Interreg-euro-med.eu)



# Table of contents

Pages & articles.....	4
Posts .....	4
Post Categories.....	5
Pages .....	6
Media .....	7
Adding a media.....	7
Media Library.....	7
Editing a media .....	8
Users and Roles .....	9
Table of accounts.....	10
Editing an account.....	11
FAQ with Betterdocs.....	12
Adding new documentation .....	12
Forms.....	13
Templates.....	13
Creating a new form.....	13
Adding and ordering fields .....	14
Setting a specific field.....	15
General Section .....	15
Appearance section.....	15
Conditional logic.....	16
Notifications.....	16
How to share your form?.....	17
Entries.....	19
Exporting entries .....	19
Events .....	20
Creating an event .....	20
Event Management.....	20
Forum .....	21



Creating a forum .....	21
Some features of the forum .....	22
Glossary (CM Tooltip Glossary).....	23

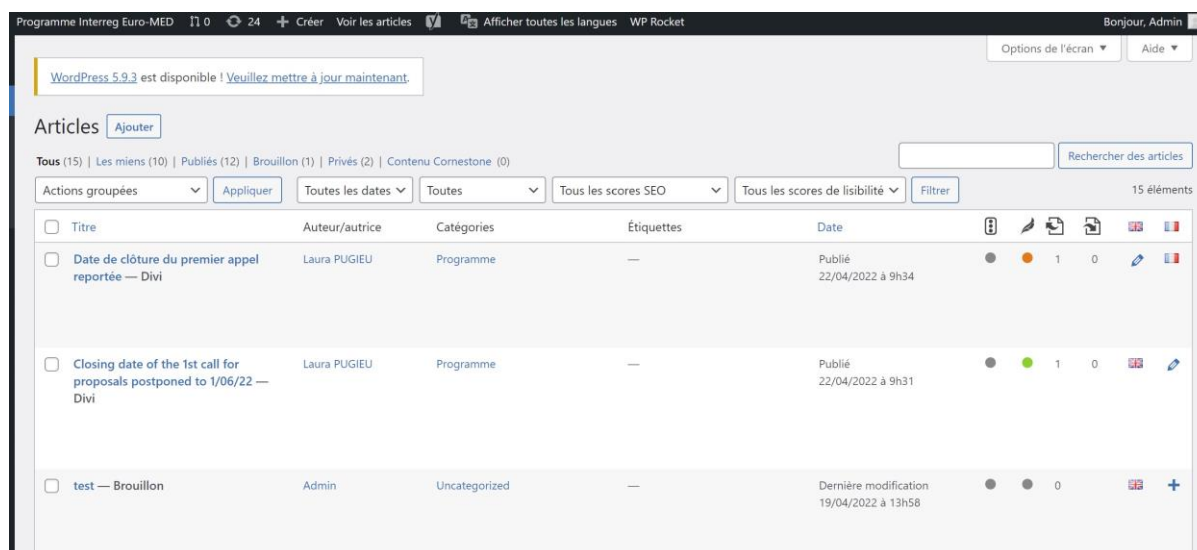
## Pages & articles







All pages and articles are delivered in English by default. French is also available.

### Posts

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

Notice: 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.



<input type="checkbox"/>	Titre	Auteur/autrice	Catégories	Étiquettes	Date					
<input type="checkbox"/>	Date de clôture du premier appel reportée — Divi	Laura PUGIEU	Programme	—	Publié 22/04/2022 à 9h34	●	●	1	0	 
<input type="checkbox"/>	Closing date of the 1st call for proposals postponed to 1/06/22 — Divi	Laura PUGIEU	Programme	—	Publié 22/04/2022 à 9h31	●	●	1	0	 
<input type="checkbox"/>	test — Brouillon	Admin	Uncategorized	—	Dernière modification 19/04/2022 à 13h58	●	●	0	0	 

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

## Post 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.

Nom	Description	Slug	Total
Appels	—	appels	0
— Appels clôturés	—	appels-clotures	0
— Appels en cours	—	appels-en-cours	2
Articles	—	articles	0

**More information on:** <https://wordpress.org/documentation/article/posts-categories-screen/>

## Pages

This section allows to manage all pages on your site. Through this section you can 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**.

The screenshot displays the WordPress 'Pages' management screen. At the top, there's a notification for WordPress 5.9.3. Below that, the 'Pages' section is titled with an 'Ajouter' button. A summary bar shows 'Tous (68)' and filters for 'Les miens (56)', 'Publiés (64)', 'Privés (4)', and 'Contenu Cornestone (0)'. There are also filters for 'Actions groupées', 'Appliquer', 'Toutes les dates', 'Tous les scores SEO', and 'Tous les scores de lisibilité'. A search bar labeled 'Rechercher des pages' is on the right. The main table lists pages with columns for 'Titre', 'Auteur/autrice', and 'Date'. Each row includes a checkbox, a status indicator (grey, red, or green dot), and numerical values for comments and views. The 'Accueil' page is highlighted in blue.

<input type="checkbox"/>	Titre	Auteur/autrice	Date				
<input type="checkbox"/>	1st call technical meeting – Building your budget – Registration — Divi	Admin	Publié 28/02/2022 à 16h29	●	●	0	1
<input type="checkbox"/>	1st call technical meeting – Building your intervention logic – Registration — Divi	Admin	Publié 09/02/2022 à 14h06	●	●	0	1
<input type="checkbox"/>	1st call technical meeting – Building your partnership – Registration — Divi	Admin	Publié 22/02/2022 à 16h42	●	●	0	1
<input type="checkbox"/>	1st call technical meeting – Questions and answers – Registration — Divi	Admin	Publié 01/03/2022 à 8h34	●	●	0	1
<input type="checkbox"/>	1st call technical meeting – The project carbon footprint – Registration — Divi	Admin	Publié 01/03/2022 à 8h18	●	●	0	1
<input type="checkbox"/>	Account — UM Connexion, Divi	Admin	Publié 29/11/2021 à 11h20	●	●	3	5
<input type="checkbox"/>	Accueil — Page d'accueil, Divi	aspitz	Publié 15/02/2022 à 11h34	●	●	24	1

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

# Media

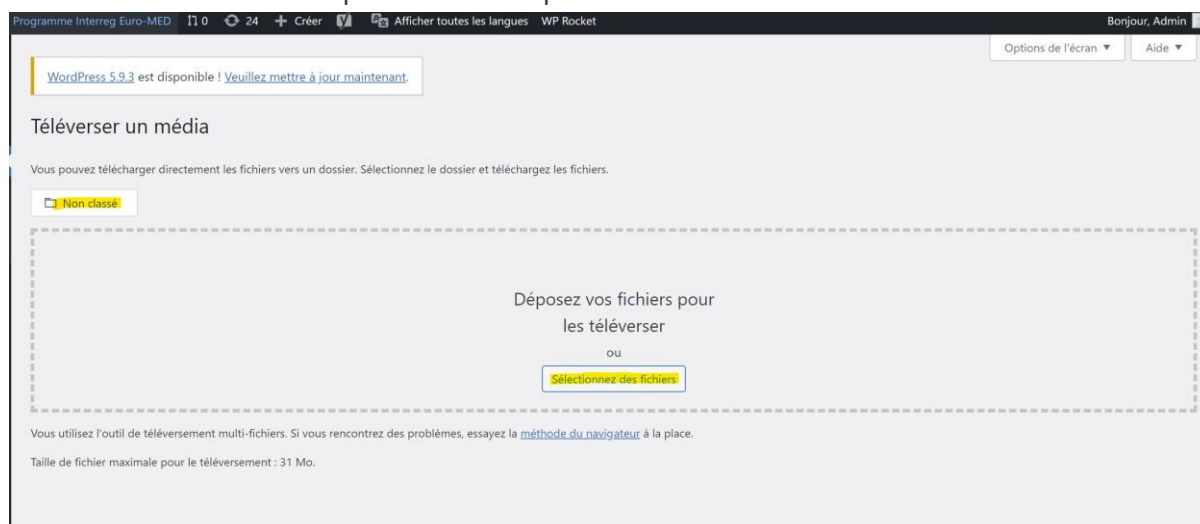
## Adding a media

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: multfile 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:** <https://wordpress.org/documentation/article/media-add-new-screen/>

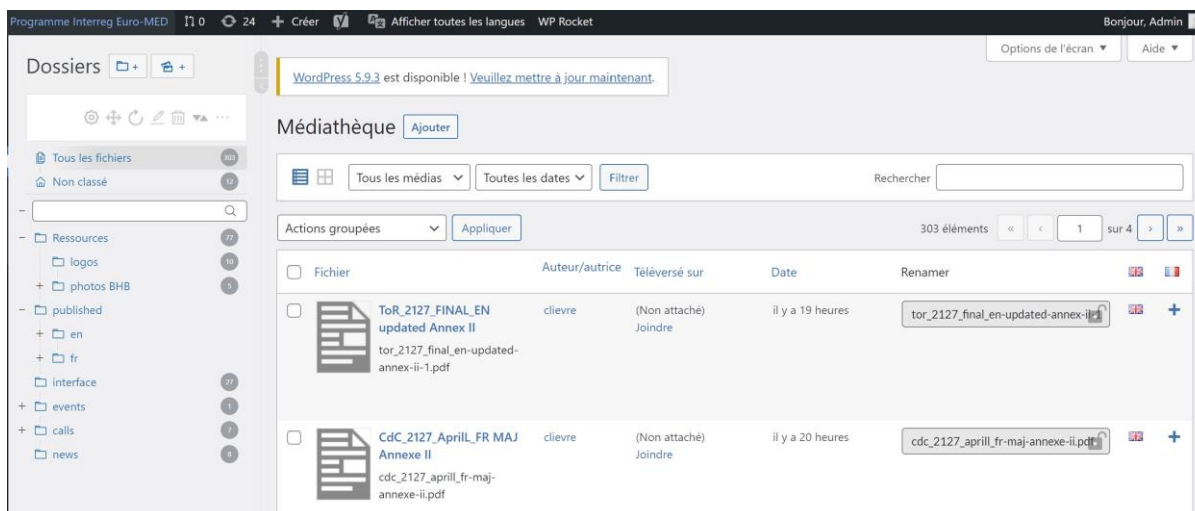
## Media Library

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/>

## Editing a media

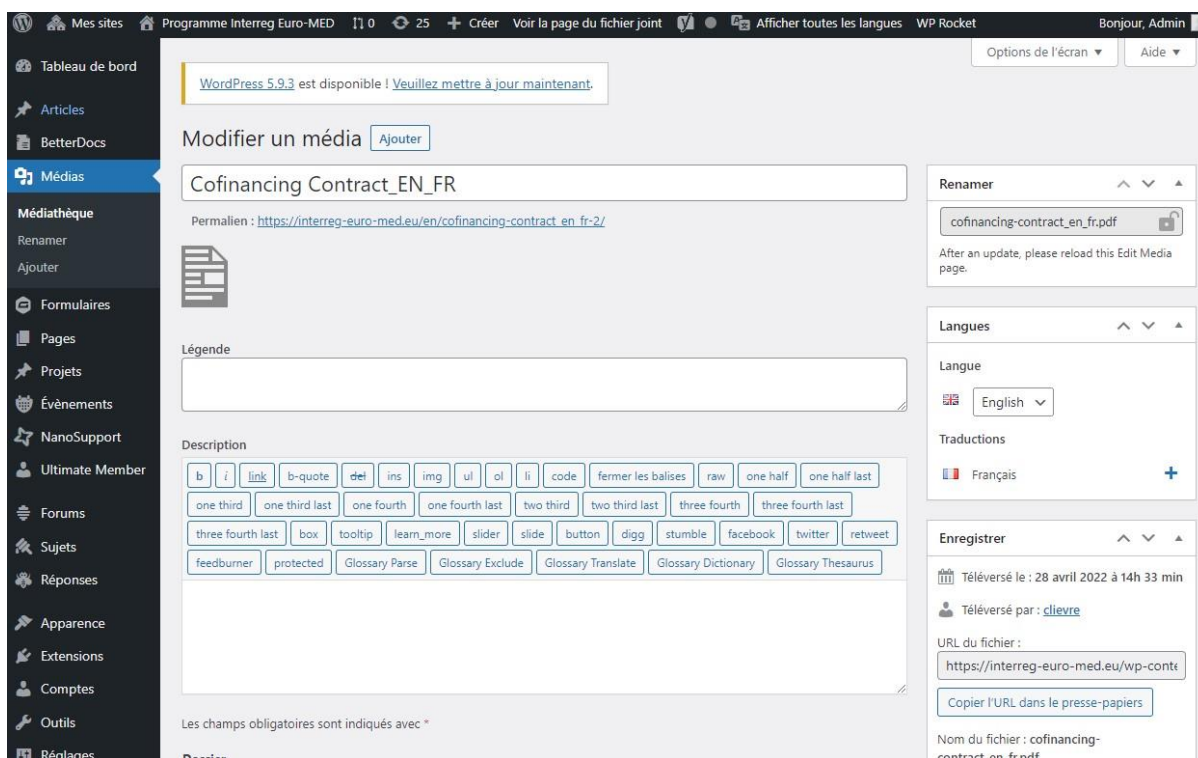
This section allows you to manage information of a media that has been saved in the library. To reach this section, go to **Dashboard>Media>Media Library** and then click on the name of the media or the **Edit** link that appears under its name. You can also access this page by clicking the **Edit** 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: <https://wordpress.org/documentation/article/edit-media/>

## 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).

## 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.

Comptes [Ajouter](#)

Tout (387) | Approuvée (280) | En attente de validation (0) | En attente de l'e-mail de confirmation (107) | Inactive (0) | Rejeté-e (0) |  [Rechercher des comptes](#)

Administrateur/administratrice (7) | Abonné/abonnée (361) | Programme (18) | Keymaster (8) | Moderator (18) | Participant (361) | 2FA Active (0) | 2FA Inactive (388)

Actions groupées

Changer de rôle pour...  Modifier le rôle sur le forum  Accorder les rôles   Action UM

Révoquer le rôle...

387 éléments   1 sur 4

<input type="checkbox"/>	Identifiant	Nom	Rôle sur le site	Rôle sur le forum	État
<input type="checkbox"/>			Abonné/abonnée	Participant	Approuvée
<input type="checkbox"/>			Abonné/abonnée	Participant	En attente de l'e-mail de confirmation
<input type="checkbox"/>			Abonné/abonnée	Participant	En attente de l'e-mail de confirmation
<input type="checkbox"/>			Abonné/abonnée	Participant	Approuvée



## 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/>

# FAQ with Betterdocs

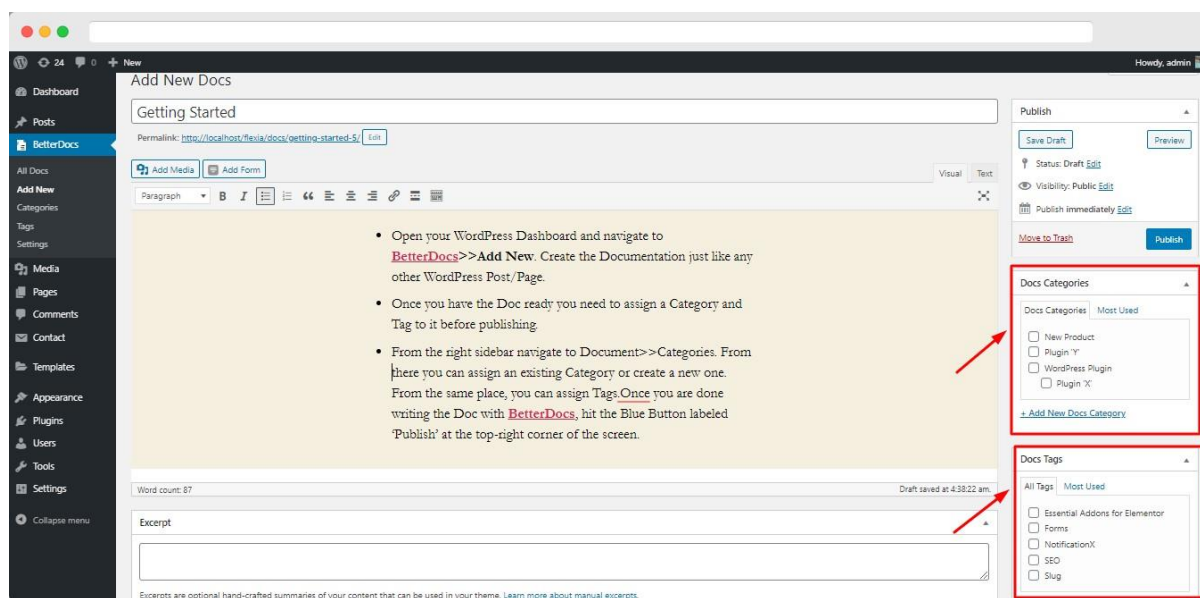
## Adding new documentation

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/>

# Forms

Full documentation: <https://docs.gravityforms.com/>

## 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 both in English and French languages. You shall duplicate the selected form to use it, and then modify or edit the settings.

The screenshot shows the Gravity Forms management interface. At the top, there is a 'Forms' header with an 'Add New' button. Below the header, there are filters for 'All (6)', 'Active (6)', 'Inactive (0)', and 'Bin (0)'. A search bar and a 'Search Forms' button are also present. A 'Bulk actions' dropdown menu and an 'Apply' button are located above the table. The table itself has 6 columns: Status, Title, ID, Entries, Views, and Conversion. There are 6 rows of form data, each with a checkbox in the Status column and a green 'Active' indicator. The forms listed are:

Status	Title	ID	Entries	Views	Conversion
<input type="checkbox"/> Active	[EN] Satisfaction survey template	4	0	0	0%
<input type="checkbox"/> Active	[EN] Template registration form (1)	6	0	0	0%
<input type="checkbox"/> Active	[FR] Formulaire de contact	2	0	0	0%
<input type="checkbox"/> Active	[FR] Modèle Questionnaire de satisfaction	5	0	0	0%
<input type="checkbox"/> Active	[FR] Template registration form	3	0	0	0%
<input type="checkbox"/> Active	Contact form	1	0	24	0%

## Creating a new form

From the forms list (in the left hand navigation area "**Forms > Forms**"), you can add, modify or edit the settings of each of the forms you have. You can also duplicate a form, which can be useful if you want different versions for multiple locations on your website.

**Forms** Add New

All (3) | Active (3) | Inactive (0) | Trash (0) Search Forms

Actions groupées Appliquer

<input type="checkbox"/>	Status	Title	ID	Entries	Views	Conversion
<input type="checkbox"/>	Active	Article invité	2	0	0	0%
<input type="checkbox"/>	Active	Formulaire de contact	1	8	7	114.3%
<input type="checkbox"/>	Active	Simulateur de prix	3	0	0	0%
<input type="checkbox"/>	Status	Title	ID	Entries	Views	Conversion

Actions groupées Appliquer

## 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).

**Nom**

Prénom

Nom

**E-mail**

**Message**

Search for a field Q

Add Fields Field Settings

▶ Drag a field to the left to start building your form and then start configuring it.

Standard Fields v

Advanced Fields v

Post Fields v

Pricing Fields v

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.

## 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.

### 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.



### 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.

## Conditional logic

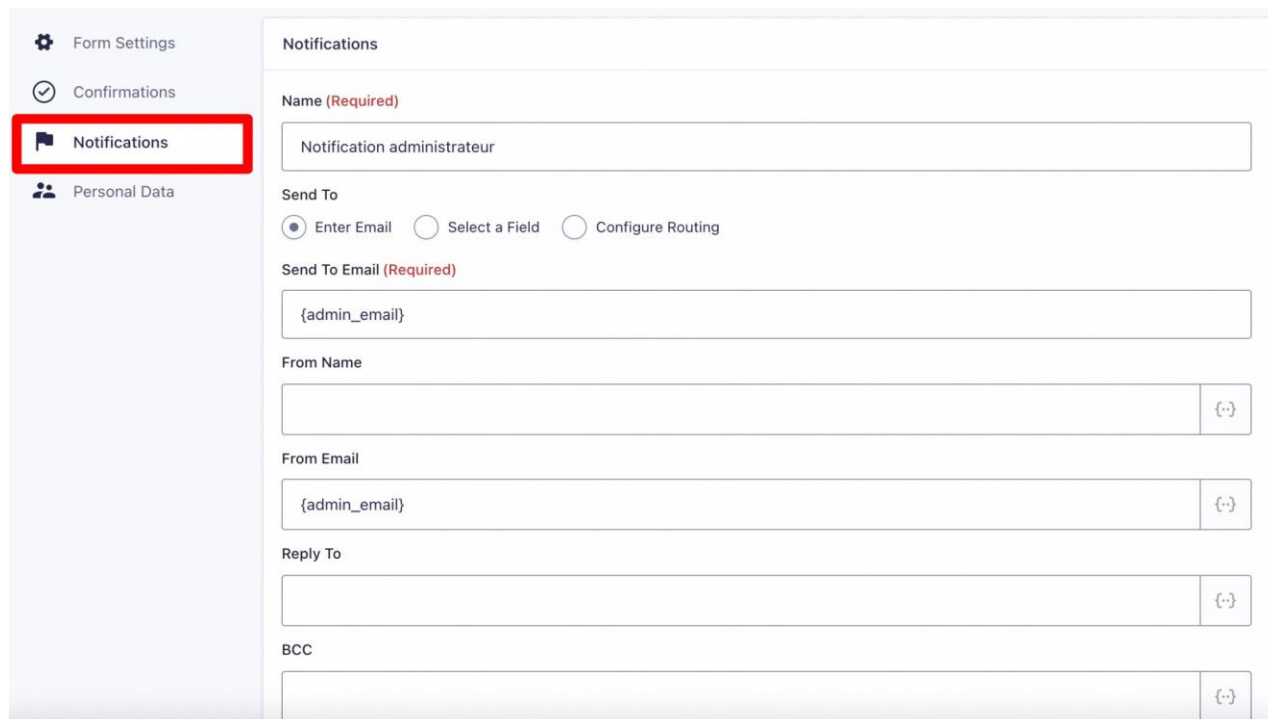
It allows you to display fields only if some conditions are met so:

- 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.

## Notifications

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.



**Notifications**

**Name (Required)**

Notification administrateur

**Send To**

Enter Email  Select a Field  Configure Routing

**Send To Email (Required)**

{admin\_email}

**From Name**

**From Email**

{admin\_email}

**Reply To**

**BCC**



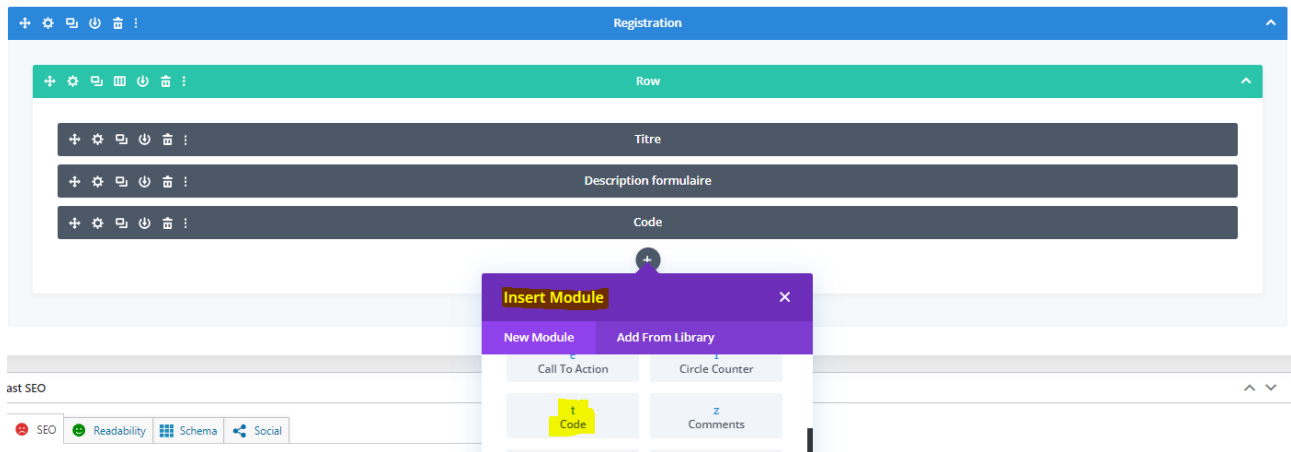
## How to share your form?

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".

### Creating a page

Once your page has been created, 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:

Forms [Add New](#)

All (110) | Active (26) | Inactive (84) | Bin (18)  [Search Forms](#)

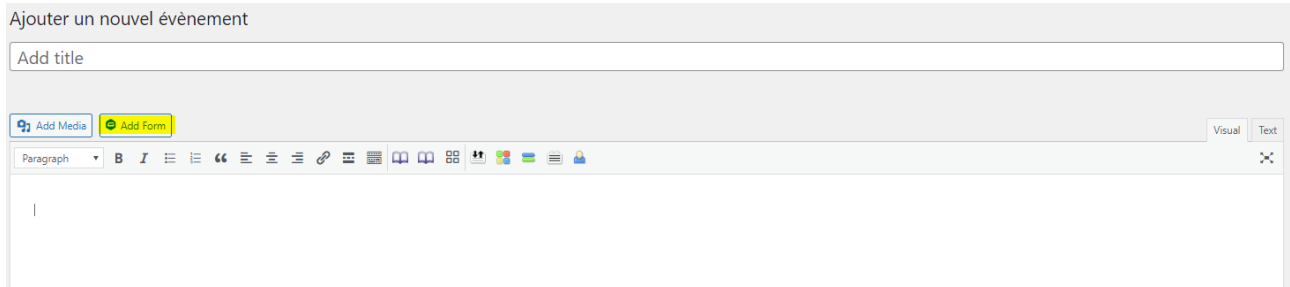
Bulk actions  [Apply](#) 110 items  of 6

<input type="checkbox"/>	Status	Title	ID	Entries	Views	Conversion
<input type="checkbox"/>	Active	[EN] Contact form	18	198	45500	0.4%
<input type="checkbox"/>	Active	[EN] Controller account validation	88	34	506	6.7%
<input type="checkbox"/>	Inactive	[EN] Deliverable library survey	89	41	1456	2.8%

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

## 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**:



Ajouter un nouvel événement

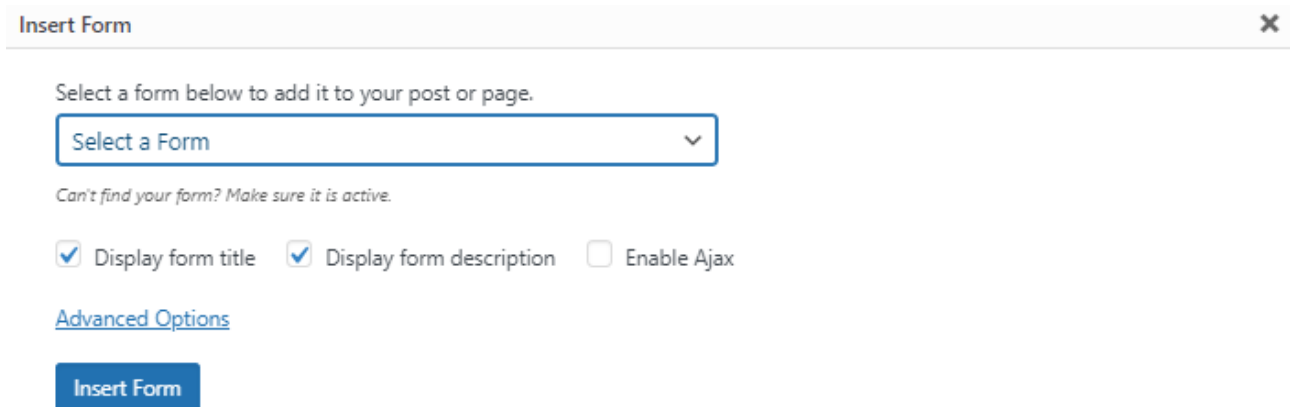
Add title

Add Media Add Form

Paragraph B I [List icons] [Quote icon] [Link icon] [Table icon] [Image icon] [Video icon] [Audio icon] [Code icon] [Fullscreen icon] [Undo icon] [Redo icon] [Help icon]

Visual Text

- Select your form from the list:



Insert Form

Select a form below to add it to your post or page.

Select a Form

Can't find your form? Make sure it is active.

Display form title  Display form description  Enable Ajax

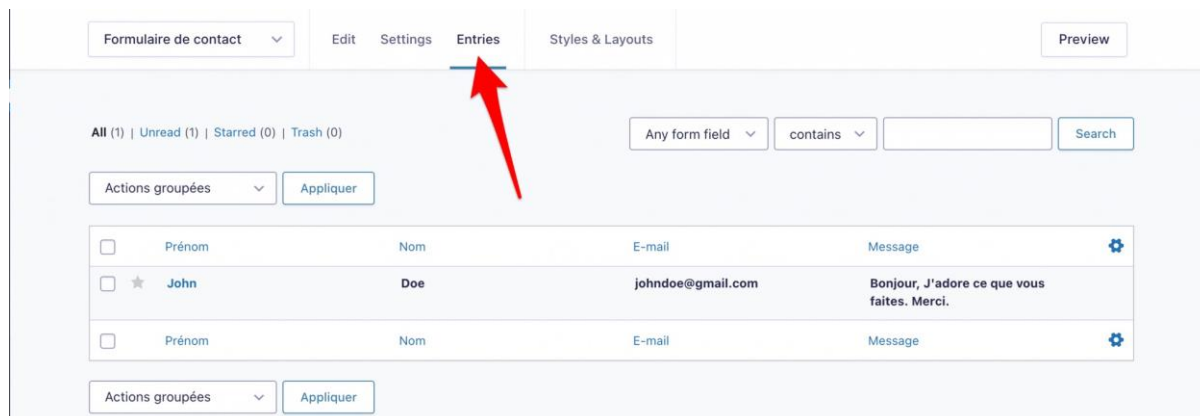
[Advanced Options](#)

Insert Form

## Entries

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

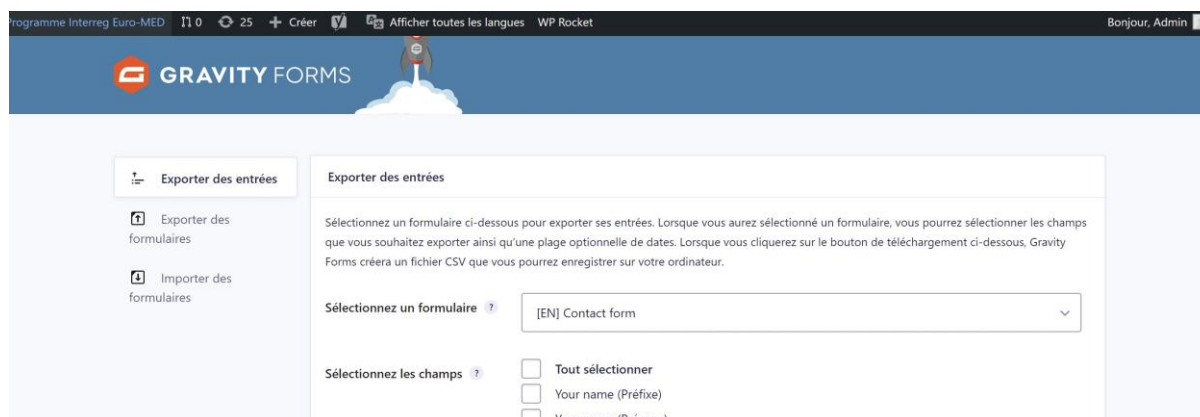
Go to **Forms > Entries** and find the list of all submissions. You can then change the form thanks to the drop-down list at the top left (on the example, *Formulaire de contact*).



## 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.



# Events

**Source:** <https://wp-events-plugin.com/documentation/>

The event handler creates four new pages:

- Events – contains the list of upcoming events as well as a search form.
- Categories – displays a list of event categories.
- Locations – displays a list of locations.
- My Bookings – displays a user's booking history and cancellation options.

## Creating an event

Go to **Events > Add Event** and 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 Google Maps map will automatically appear and display the information.

It is also possible to attach a GravityForm 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.

## 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.

## Forum

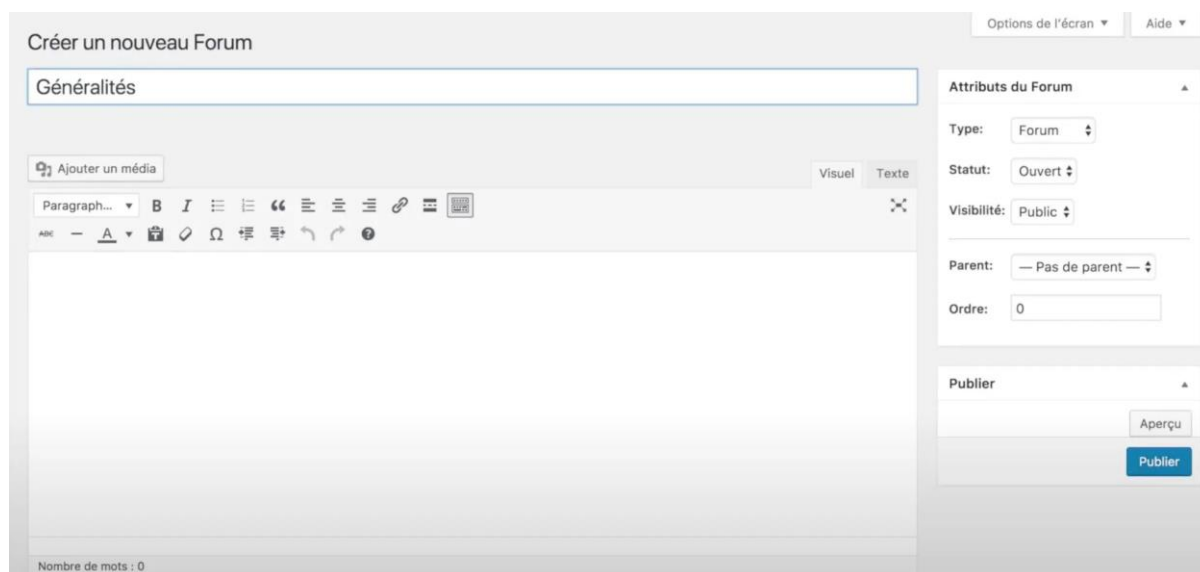
In general, forums are great for creating unique, interactive content and engaging users with your site. They also offer the possibility to optimise your website for search engines (e.g. Google) with keywords.

### 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 screenshot shows the 'Créer un nouveau Forum' interface. The main area is a text editor with a toolbar and a large empty text area. The right sidebar contains 'Attributs du Forum' (Forum Attributes) with fields for Type (Forum), Statut (Ouvert), Visibilité (Public), Parent (Pas de parent), and Ordre (0). At the bottom right, there are 'Aperçu' and 'Publier' buttons.

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.

<input type="checkbox"/> <b>Ordinateurs</b> Tout ce qui touche nos machines Apple	0	0
<input type="checkbox"/> — MacBook Pro	0	0
<input type="checkbox"/> — MacBook	0	0
<input type="checkbox"/> — MacBook Air	0	0
<input type="checkbox"/> <b>Smartphones</b> Toutes les questions relatives a nos chers iPhone	0	0
<input type="checkbox"/> — iPhone 7	0	0
<input type="checkbox"/> — iPhone 8	0	0

## Some features of the forum

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.

## 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.

