



# User's Guide Contributor EU-SELF Digital Platform

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# User's Guide Contributor

## EU-SELF Digital Platform

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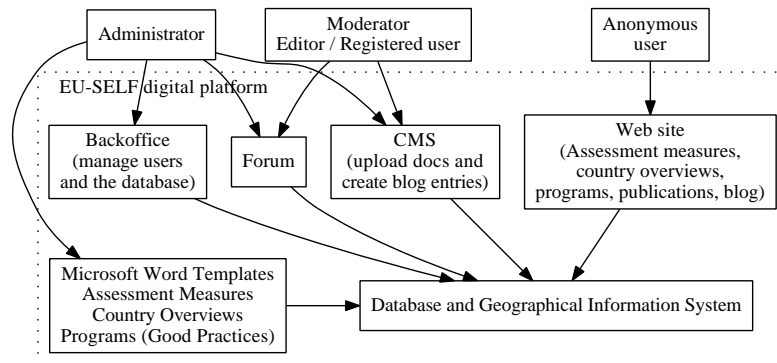


Figure 1.1: EU-Self Digital Platform. Anonymous users can see the Site and the Blog (they cannot see the Forum). Registered users, that is, users that showed interest in contributing and were approved, are configured as Editors. Editors use the CMS (Content Management System) to upload documents and gallery images and write blog posts, they can also see and participate in Forum discussions. Moderators, besides being able to do what Editors can, use the CMS to approve blog posts created by Editors for publication in the Web site. Administrators have access to the backoffice, manage users, configure the CMS and the Forum and as an alternative to the use of the Backoffice can import data placed into Microsoft Word templates. The Geographical Information System supports automatically georeferencing information from the city name or country name and adding it to the world map.

## 1.1 Introduction

This is the User’s Guide for Contributors to the EU-SELF Digital Platform. That digital platform was developed within the context of the Erasmus+ Project EU-SELF — Social and Emotional Skills Development in Early Childhood Education and Care (Grant Agreement Number: 2019-1-BG01-KA201-062593).

An overview of the components of the EU-SELF Digital Platform is presented in Figure 1.1. The digital platform consists of:

1. A Web site, available to the general public (anonymous users) that includes information on Social and Emotional Skills Development in Early Childhood Education and Care, including:
  - (a) Assessment Measures: Social and Emotional Competences and Development of Children Aged Zero to Seven, European Assessment Measures Compendium with more than 100 selected assessment measures.
  - (b) Country Overviews: Social and Emotional Skills Assessment, Development and Intervention in early childhood in a selected list of 50 countries. That list includes the European countries (except Andorra, Monaco, San Marino, Vatican City (Holy See)), the transcontinental countries partially located in both Europe and Asia, countries that politically are considered European countries though geographically are located in the West Asia territory, and 3 other countries: Australia, Canada, Japan.
  - (c) Programs: more than 50 programs and good practices in Social and Emotional Skills Assessment, Development and Intervention.
  - (d) Publications: a curated list of documents available for download
2. A Blog, also available to the general public (anonymous users), with blog posts created by the project partners and other registered user’s that were invited to participate and that were assigned to the role of editors or moderators. The blog editors create blog posts and the blog moderators validate them prior to publication.

3. A CMS (Content Management System) that is used to manage the creation and validation of Blog posts, upload of images and documents, and that can be used to allow adding new features and sections to the public web site
4. A Backoffice that is used to enter structured information about each Assessment Measure, Country Overview or Good Practice. As an alternative it is also possible to fill-in Microsoft Word templates and those templates will be used by the administrator to automatically import the data into the database
5. A Forum with low administrative overhead. It is a private forum open to registered user's only. The forum supports moderation but the contents are viewed even before being approved or soft deleted, in this way the overhead of managing the forum is reduced to the bare minimum. The administrator creates Categories and the registered user's can create or comment on Topics belonging to those Categories. There is support for private topics (private conversations) open only to the registered user's that were invited to participate on that topic at topic creation<sup>1</sup> time.
6. To allow georeferencing information on the world map, next to the database there is a full fledged geographical information system (GIS). It supports automatic georeferencing and placing the corresponding clickable markers on the map for 249 countries<sup>2</sup> and 24336 cities, as well as adding markers for arbitrary points, in this case by providing their latitude and longitude. Complex spatial queries are also supported (e.g. finding information within a given distance from a given point).

The digital platform was developed with an emphasis on future expansion and support for accessing it from both desktop computers and mobile devices (tablets and smartphones). There is full separation between the digital contents themselves and the presentation of those contents in the web site, this means that it will be possible later on to improve the usability and look and feel of the web site without impacting the rest of the digital platform.

The following sections explain the most important parts of the digital platform<sup>3</sup>:

- The entry URLs to the digital platform (Section 1.2)
- How to register as a Contributor (Section 1.3)
- How to later on change or set the CMS user information (Section 1.4)
- The permissions associated with different types of users (Section 1.5)
- How to create, moderate and publish blog posts (Section 1.6)
- How to use the Forum (Section 1.7)
- How to provide feedback on bugs and suggestions for improvement (Section 1.8)
- Justification for the need of defining and using name conventions before too many images and documents are added to the digital platform (Section 1.9)
- List of sections of the public web site (Section 1.10)
- A compact *cheat sheet* explaining how to do common tasks on the digital platform (Section 1.11)
- A list of the known bugs and limitations and possible workarounds (Section 1.12)

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<sup>1</sup>It is possible to later on change the list of users that can participate on that topic, both removing existing users and adding new users to the list.

<sup>2</sup>Some of them do not represent independent countries.

<sup>3</sup>Because the platform was built to be extendable it supports some functionalities that are either deactivated or are not mentioned here because for the time being those functionalities do not seem to be relevant.

## 1.2 Access to the Digital Platform

The digital platform is available at the address <https://euself.nbu.bg> (if that address is temporarily not available it is also possible to use the alternate address <https://euself.ismai.pt>).

## 1.3 Registering as a Contributor

If at this moment you don't have a login and want to contribute to this project do as follows:

1. At the home page, either click on the top image or click on the text “*Get involved (Registration)*” that is present at the bottom of the page
2. In the online form fill-in your first name, last name, email, and a short message explaining your interests and motivations. Pay special attention to verifying that you filled-in your correct email address
3. Press the **Submit** button, if the submission is successful<sup>4</sup> then you should see the message:

### **Thank you**

Thank you for your interest in contributing, the information you submitted will be analyzed by the project manager and you will be contacted soon

and the project manager is notified by email of your submission

4. Approved submissions (the project coordination decides whether to approve or refuse the candidate contributor) receive an automatic email sent from [project.erasmus.euself@gmail.com](mailto:project.erasmus.euself@gmail.com) that contain the username and password and a link to the contributor's user's guide. That email has the following format:

Subject: Get involved into EU-SELF project: user accepted

Dear Contributor,

Thank you for your interest in the EU-SELF project (<https://euself.nbu.bg>).

You were accepted as a contributor to the EU-SELF project.

Your username is: <the username>

Your password is: <the password>

Using these credentials you can now login and participate in the Forum or in creating Blog posts, notice that the blog posts are moderated, only after your posts are approved will they appear in the EU-SELF site for others to see.

The Contributor's user manual can be downloaded from <https://euself.nbu.bg/selfdp/documentation/>

For further information please contact [nkoltcheva@nbu.bg](mailto:nkoltcheva@nbu.bg)

The email address [project.erasmus.euself@gmail.com](mailto:project.erasmus.euself@gmail.com) is only used for sending emails, no one is reading this email account so please do not reply to this message.

Best regards

The EU-SELF project team

5. If after a few days you did not receive any feedback please check your SPAM or Junk email folder to see if there is an email from [project.erasmus.euself@gmail.com](mailto:project.erasmus.euself@gmail.com) in there. If after a week no feedback was received try submitting again, this time double-checking your email address and explaining in the message that this is not your first submission and that you did not receive any feedback (notice that if your message is not clear enough the project coordination might decide to refuse your application). Refused applications are not automatically notified by the digital platform, it will be the project coordination decision whether or not to send an email to the candidate explaining the reasons for the refusal.

<sup>4</sup>To help preventing SPAM the online form is protected by Google reCAPTCHA, see the *privacy terms* logo at the bottom right of the page, if for some reason your submission is found to be suspicious the form blocks without moving out from the submission page, if that happens try submitting again.

6. The username and password can be used to Login in the CMS (Login menu) or the Forum (EU-SELF Forum at the top right). The password can be changed<sup>5</sup>.

## 1.4 Set or change CMS user information

An user that is registered to use the CMS (editor, moderator or administrator) can autonomously set or change his or her user information: go to CMS admin, login if necessary, click at bottom left (it displays the username of the user that is login) / Account settings.

This allows to set or change the profile picture<sup>6</sup>, email, password, notification preferences<sup>7</sup>, language preferences<sup>8</sup>, current time zone, and the name of the user (first and last name).

## 1.5 Types of Users

### 1.5.1 Anonymous user

An anonymous user can see the public web site including the Blog but cannot see the Forum nor use the digital platform CMS or backoffice.

### 1.5.2 Registered user

A registered user is allowed to see and contribute to the Forum and is an Editor in the CMS.

### 1.5.3 CMS Editor

The CMS uses trees to organize the pages in an hierarchical fashion, this concept is similar to the hierarchical organization created in a computer disk by placing folders inside folders, each folder containing files and folders. In the CMS, in the vertical left side menu, select **Pages** and then navigate in the pages navigation menu that appears at the right until you reach the correct page.

An editor can add pages, images, and documents. For the time being the most important task of an editor is to create blog pages with blog posts, see Section 1.6.1.

The editor (and the moderator) can leave comments on a given web page explaining the rationale for whatever is being done or discussed or asked to be changed or fixed. See Section 1.5.5.

### 1.5.4 CMS Moderator

A moderator, besides having the same capabilities as an editor, can additionally validate and publish web pages, namely blog posts (blog pages).

### 1.5.5 Comments (editor or moderator)

The editor and the moderator can leave comments on a given web page explaining the rationale for whatever is being done or discussed or asked to be changed or fixed. The comments are accessed by going to the small comment bubble at the right. Clicking on it shows or hides the existing

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<sup>5</sup>If changing the password notice the following: the password must have at least 12 characters, cannot be too similar to the username, cannot consist only of digits, cannot be one of the 20 thousand more common passwords.

<sup>6</sup>If no picture is uploaded and that email is associated with an account in [www.gravatar.com](http://www.gravatar.com) then that picture avatar will be used

<sup>7</sup>Whether to receive any of 3 kinds of notifications: when a page is submitted for moderation, when your page edit is approved, when your page edit is rejected

<sup>8</sup>In terms of the EU-SELF project partners languages the backoffice can be displayed in English, French, Portuguese, Hungarian, Croatian, or Swedish. For the time being Bulgarian (16% translated, 1311 strings to translate), Bosnian (0% translated, 1560 strings to translate), or Serbian (0% translated, 1560 strings to translate) are not supported.

comments, allows adding a new comment or to be notified by email when comments are added<sup>9</sup> to this page. In each comment by clicking on the vertical 3 dots menu it is possible to edit, delete or resolve an existing comment.

## 1.5.6 Administrator

The administrator manages users and groups and configures the digital platform.

## 1.6 Blog

### 1.6.1 Create a Blog Post

To create a blog post (blog page) you have to be a registered user of the EU-SELF Digital platform and you have to be an editor, a moderator or an administrator.

1. To create a “blog post / blog page” login in the CMS and:
  - (a) In the top left click on “Pages”, this expands a submenu
  - (b) In the submenu click on *the arrow at the right of* “EU-Self TOP page LIVE + DRAFT”
  - (c) Click on “Blog posts LIVE + DRAFT”
  - (d) Press the button “+ ADD CHILD PAGE”
  - (e) Click on “*Blog page*”, a form with several fields to be filled-in appears
2. Fill-in at least the mandatory fields, thus **creating the blog post**
3. The mandatory fields are the “Title”, “Internal information partner” (won’t be seen in the public site), “Internal information blog theme” (won’t be seen in the public site), “Post date”, “AUTHOR”, “INTRO(duction)”. The “BODY” is not mandatory (to allow saving the blog page without it) but it should always be filled-in before the blog post is published
4. At the top of the page, just after filling-in the “Title”, switch from the **Content** tab to the **Promote** tab, and check whether the **Slug**<sup>10</sup> got a good short name (it is automatically created from the blog title replacing spaces with dashes). If the *slug* is too long try to shorten it but in such a way that just from the *slug* people can still understand what the blog post is about (you cannot use spaces in the slug, if you do that they will be automatically replaced with dashes). The *slug* is important if people from outside the EU-SELF digital platform create direct links to that blog post or if in a document they want to make a citation of that Blog post (a too long URL would be awkward to put in a citation). After checking the **Slug** go back to the **Content** tab and finish filling-in the blog post
5. Do not repeat the text that you put in the “INTRO(duction)” again in the “BODY”, the blog post will have the text placed in the INTRO and the text placed in the BODY concatenated, thus if you repeat the text it will appear twice
6. In the **Body** it is possible to copy/past text from the internet or from a Word document, this is the easiest way to add text.

Alternatively it is also possible to use the WYSIWYG (what you see is what you get) editor to manually add text (or change the cut/pasted text):

<sup>9</sup>You will always receive email notifications for threads you are part of, unless you opt out of all comment notifications in your account settings.

<sup>10</sup>Slug is a newspaper term. A slug is a short label for something, containing only letters, numbers, underscores or hyphens. They’re generally used in URLs.



- (a) In the **Body** just start typing text. Once you start typing text or press enter, at the left of the rectangle appears a  $\oplus$ , by clicking in it it is possible to insert H2 H3 H4 headings, numbered list, bulleted list, embed an external link (e.g. to a video), insert an image (full-width, left-aligned, right aligned), or an horizontal line.
  - (b) If on the other hand in the **Body** we select some text then a new subwindow appears, it allows us to select B (bold text), I (italic text), heading level H2 H3 or H4, numbered list, bulleted list, an hyperlink (internal link, external link, email link, phone link, anchor link), or to add a document (creates a link to one of the documents previously added to the platform or that can be uploaded at this time).
7. Optionally each blog post (blog page) can:
- (a) Have one or more tags (keywords) added by the person that created the blog page. The tags are free text but they should be part of a standardised list (e.g. a thesaurus). To add a tag write the text and then press any of these 3 keys: comma (,), tab ( $\rightarrow$ ) or **enter**.
  - (b) Belong to one or more categories. The categories represent a predefined fixed list<sup>11</sup>, that list can be changed in “CMS / Snippets / Blog categories / Add blog category”. To mark a blog page as belonging to one or more categories, when creating the blog page select one or more checkboxes in the **Categories** field
  - (c) Have one or more Gallery Images, just press the + **ADD GALLERY IMAGES** in the button at the bottom.
8. At the bottom in the green button, select **SAVE DRAFT** (if you want to complete it later) or **SUBMIT TO MODERATORS APPROVAL** (if the blog page is ready to be reviewed by the moderator). If you are not an editor but a moderator or an administrator then you also have the option of **PUBLISH**<sup>12</sup> or **LOCK**<sup>13</sup>
9. To preview how the page will look like, at the *top right* press the smartphone button (as soon as you hover over it, it will say **Preview**), this will make appear a subwindow at the left, press the *smartphone* button to see how the blog post will look like in a smartphone, press the *tablet* button to see how it will look like in a tablet, press the *monitor* button to see how it will look like in a computer monitor, or press the  $\swarrow$  button to see it in a separate tab in your browser.
10. Only blog pages that are created as children of the “**Blog posts**” page will appear on the public part of the site. If by mistake a blog page was created in the wrong place then go to that page press the button **MORE** and then select **Move** and move it to the correct place as a child of “**Blog posts**”

## 1.6.2 Review and Publish Blog Page

If you are a moderator or an administrator you can review a blog page / blog post and if it is not OK you can correct it or request to the editor that changes be made to the page, and if it is OK you can publish it:

1. Things to pay special attention to:
  - (a) At the top switch from the **Content** tab to the **Promote** tab, and check whether the **Slug**<sup>14</sup> got a good short name (it is automatically created from the blog title replacing spaces with dashes). If the *slug* is too long try to shorten it but in such a way that just

<sup>11</sup>Initially the snippets list (categories) has 2 entries: “0-3 years old” and “3-7 years old”

<sup>12</sup>The blog page appears in the public site and becomes visible to anonymous users.

<sup>13</sup>A moderator or an administrator have the ability to lock or unlock a page (and any pages underneath it) for editing, preventing users from making any further edits to it until the page is unlocked.

<sup>14</sup>The term slug was explained in a footnote in the previous section.

from the *slug* people can still understand what the blog post is about (you cannot use spaces in the slug, if you do that they will be automatically replaced with dashes). The *slug* is important if people from outside the EU-SELF digital platform create direct links to that blog post or if in a document they want to make a citation of that Blog post (a too long URL would be awkward to put in a citation). After checking the Slug go back to the **Content** tab and finish checking the blog post

- (b) Verify that the editor did not, by mistake, repeat the text that he/she placed in the **Intro** also at the top of the **Body**, if that is done the text will appear duplicated because the **Intro** and the **Body** are concatenated. If that is the case remove the repeated text from the top of the **Body** or ask the editor to do it
- (c) Verify that the editor did not use a **Post date** in the future that would cause the blog post, if approved now, to appear mentioning a future date (e.g. we are in October and the date is in December), that would look awkward and should be avoided. If that happens just correct the date to be the date of today or at maximum 1 day from now (can be justifiable by the existence of different timezones).

Nevertheless, if what was wanted was for this blog post to go live not now but sometime in the future, then the date must be left as it is (i.e., a date in the future) but we also need at the top right to click on the ⓘ (the word *Status* is shown when we hover over it), then in the expanded tab that appears at the right to select **Set schedule**, and finally in the subwindow that subsequently appears to put the “Go live date/time”, which should be the same date as is in the **Content** tab

2. **Review and ask for changes to a blog page:** go to the CMS, select “**Reports / Workflow tasks**”, click on the page name, the page will be displayed with all its fields. To preview how the page will look like, at the *top right* press the smartphone button (as soon as you hover over it, it will say **Preview**), this will make appear a subwindow at the left, press the *smartphone* button to see how the blog post will look like in a smartphone, press the *tablet* button to see how it will look like in a tablet, press the *monitor* button to see how it will look like in a computer monitor, or press the ↗ button to see it in a separate tab in your browser.

Then in the green button at the bottom press **REQUEST CHANGES** and leave a comment. Before pressing **REQUEST CHANGES** it is also possible to use the bubble at the top right to provide more detailed comments that apply to a given field instead of to the blog post as a whole: click on the bubble and make sure it changed color from dark to light, then navigate to a given field and press the small bubble that appears at the right of the field and add the comment.

3. **Approve and publish a blog page:** do as explained above except that at the end select **APPROVE AND PUBLISH**
4. **Scheduled publishing of a blog page:** instead of publishing the blog page immediately it is also possible to specify a date in the future when the blog post will automatically go live: at the top right click on the ⓘ (the word *Status* is shown when we hover over it), then in the expanded tab that appears at the right select **Set schedule**, and finally in the subwindow that subsequently appears to put the “Go live date/time”, which should be the same date as is in the **Content** tab.

When doing this notice that the blog page **Post date** (that is set in the **Content** tab) can only be set to a date between 360 days in the past and 124 days in the future, this is to help avoiding mistakes such as publishing a new blog post that has a date 1 year in the past (if there is a need to correct a blog page that has a **Post date** more than 1 year in the past then the field **Post date** will need to be updated to a more recent value otherwise you will not be able to save the changes)

### 1.6.3 Add gallery images

Images that can be added to the blog posts (blog post gallery images) should be added in advance<sup>15</sup>. The best way to do when adding, lets say 20 images in a single operation, is as follows:

1. Verify that there are no copyright or royalty issues with the use of those images
2. Put all those images in a single folder (directory)
3. Check that the images are not too big to be used in the web, if they are several megabytes in size it is better to reduce their size (the maximum accepted file size is 10 megabytes, but that is way too big for using in the web, the file size should be just a few hundred kilobytes)
4. Check the filenames, it is better to use descriptive names separated by dashes (minus sign), e.g. here are the names chosen for 25 royalty free images that were preloaded into the gallery (the largest has size 169 kilobytes): `child-painting-house.jpg` `children-drawing.jpg` `children-painting.jpg` `children-with-sword-baloons.jpg` `two-children-playing-together1.jpg` `child-surrounded-by-others.jpg` `children-in-class-clapping.jpg` `children-paying-attention-class.jpg` `children-without-masks.jpg` `two-children-playing-together2.jpg` `child-with-scissors.jpg` `children-in-class.jpg` `children-playing-together-kindergarten.jpg` `kids-molding-with-colorful-modeling-clay-1.jpg` `two-children-playing-together3.jpg` `children-and-book.jpg` `children-learning-letters.jpg` `children-with-masks.jpg` `kids-molding-with-colorful-modeling-clay-2.jpg` `two-children-playing-together4.jpg` `children-clapping.jpg` `children-listening-to-story.jpg` `children-with-molding-clay.jpg` `pensive-child-painting.jpg` `woman-teaching-kids-how-play-with-colorful-tower.jpg`

The use of these kind of names will help when searching the image gallery for an appropriate image and with these names it is no longer necessary to specify a title for the images (by default the title will be the filename and in this case it is descriptive enough)

5. Go to the CMS, select “Images / + Add an image”
6. Drag and drop in a single operation all images from your computer folder that has the prepared images into the rectangle that says “*Drag and drop images into this area to upload immediately.*”. Notice that if you sort the images in your computer by for example the filename then they will be uploaded in that order.
7. One by one, from top to bottom, go to each image and if necessary change the title (which by default is the filename thus probably will not need changing) and add a few appropriate tags. Here are some examples of tags: `children`, `playing`, `classroom`, `painting`, `clay`, `book`, `clapping`, `story`, `masks`, `city`, `school`, `partners`. Do not press the `Update` button, it is better to add a couple of tags to all of the images before saving<sup>16</sup> because some tag names on afterthought might not be appropriate and needed to be changed
8. After being satisfied with all the Titles and all the Tags, from top to bottom (it is easier to save from top to bottom) press the image `Update` button, that causes the image to be uploaded and saved
9. After that it is possible to search or browse the images in the gallery (“CMS / Images”). Navigate in the image pages or in the “`Search images`” put a part of the title or put a tag name (it is also possible to filter by the 10 most common tag names)

<sup>15</sup>Instead of using the option of adding them while creating the Blog post, if we are just adding one or two gallery images and we know which tags to use then we can add them while creating the blog post, otherwise it is better to add them separately, before creating the blog post, how to do that operation is what is described here.

<sup>16</sup>After saving it is of course possible to change the image tags, it just takes more time to do it.

## 1.7 Forum

### 1.7.1 Forum features

The forum supports the following main features:

1. Forum administrator: create categories and sub-categories; create regular users, moderators and administrators; edit and deactivate user accounts
2. Public conversations<sup>17</sup> and private conversations (only for the users invited to that conversation)
3. Anonymous users: can read<sup>18</sup> public conversations
4. Registered users: can start conversations, can comment and can participate in private conversations that they were invited to by another registered user
5. Notifications: the user can receive a notification when someone mentions his/her `@username`, or quotes or replies within a conversation started by that user. The email notifications can be never (default<sup>19</sup>), immediately, weekly.
6. Likes: support for highlighting any comment that the user likes with a *like*
7. Sharing: support for sharing using Twitter, Facebook or Email
8. Drafts: unfinished (unpublished) comments are automatically saved to local storage so that the user can complete them later
9. Information of when the user was last seen online (updated once every minute)
10. Moderation tools: pin/move, lock/unlock, and soft-delete topics<sup>20</sup>; move, edit, and soft-delete comments<sup>21</sup>; lock/unlock, create, and soft-delete categories/sub-categories
11. Private forum: the entire forum can be set to private mode, requiring every user to be logged-in to view its content
12. Asynchronous tasks: sending emails, periodic & real-time search indexation, and email notifications
13. Security feature: if there are too many consecutive submissions from the same user the forum will ask the user to wait 10 seconds before making a new comment
14. Support for in a given topic to include a poll to obtain votes on the different options, it counts the votes and supports showing who voted on which option. After voting it is still possible for that forum member to change the vote but each member will only count as a single vote (the previous vote will be removed). Because it is only possible to vote on a single option this cannot be used as an alternative to scheduling with Doodle, it is only appropriate for choosing between mutually exclusive alternatives
15. Mobile first responsive design
16. The color scheme of the user interface of the forum will be automatically set to *light mode* or *dark mode* depending on the settings configured in the user browser (there is no user level interface to change the color scheme, it will depend on what was set for the browser)

<sup>17</sup>A conversation is a thread of forum posts

<sup>18</sup>Although this is supported it is currently disabled: the forum was configured in private mode, anonymous users cannot read public conversations, only registered users can do that.

<sup>19</sup>This is configured in the user profile

<sup>20</sup>A deleted topic can be recovered by the administrator using the forum interface. If a moderator needs to recover a deleted topic then it is necessary for the moderator to use the backoffice: Spirit Topic / Topics / change checkbox “*Is removed*”

<sup>21</sup>A deleted comment can be directly undeleted by the moderator, there is no need to use the backoffice

17. Support for uploading files (this feature can be individually disabled)

## 1.7.2 Forum configuration

It is necessary to decide:

1. If the forum is configured as a public forum (if so then anonymous users can see what is posted in the public conversations of the forum) or as a private forum (only registered users can see its contents)
2. What is the initial list of categories and subcategories to be used in the forum, that list can be extended later but the initial values must be provided
3. What is the initial list of topics to be added to some of the categories, that list can be extended later but the initial values should be provided (just to organize the information, otherwise it might become too unstructured)
4. The user that is going to be the forum administrator and the list of users that are going to be forum moderators, that list can be changed or extended later but the initial values must be provided

Initially forum email notifications will be disabled but later on they can be enabled.

## 1.7.3 Forum users

From the point of view of using the forum there are four types of users: anonymous user, registered user, moderator, administrator.

**Warning:** an user can be independently configured to be a CMS (Blog) moderator and to be a Forum moderator, that is, it is not necessarily true that a Blog moderator is a Forum moderator and vice-versa.

## 1.7.4 Anonymous user

If the forum is configured as a private forum then anonymous users are not supported, that was the choice taken in the EU-SELF digital platform. If the forum was configured as a public forum (it was not) then anonymous users would be able to read the text and the comments published in public conversations but they could not do anything else.

## 1.7.5 Registered user

1. Can search<sup>22</sup> on topic titles and comments<sup>23</sup> using category/sub-category filter
2. Can read the text and comments present in public topics, and can add new comments to those topics provided that the topic has not yet been closed<sup>24</sup> by a moderator
3. For private topics it is exactly the same as in public topics provided that the user is in the list of users invited to participate in those private topics
4. Can create public topics and add comments to a conversation about a given topic. To create a (public) topic click on the username at the top right / **Topics** / **Create topic**, choose

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<sup>22</sup>By providing 3 or more characters to search

<sup>23</sup>The search index is created by periodically running a task to index the forum contents, until that task has been run the new forum contents won't be found.

<sup>24</sup>The moderator can also reopen a topic that had been closed

the category, write a comment in Markdown text format<sup>25</sup>, and then press **Publish** at the bottom right. The user that created the topic or any moderator or administrator can later on edit<sup>26</sup> the topic text.

5. To create a private topic click on the username at the top right / **Private topics** / **Create topic**, and then do as for public topics except that it is also necessary to add a comma separated list of usernames<sup>27</sup> that are going to participate in the conversation in that private topic
6. To participate in the conversation about a given topic select the topic. It is possible to Report<sup>28</sup>, Share<sup>29</sup>, Like<sup>30</sup>, Quote<sup>31</sup>, Reply<sup>32</sup>, or Comment<sup>33</sup>

Notice that all comments and topics are immediately visible in the forum as soon as they are created, it is not necessary to wait for the moderator's approval (doing that would break the forum dynamics as there could pass several hours or days before the moderator validated the text). The job of the moderator (as seen in the next section) is to fix problems that might exist in existing topics and comments, not to validate the text before it is made public. If that is a problem then just make the forum private so that only registered users can see the forum topics.

## 1.7.6 Forum Moderator

The moderator has the same functionality as registered users and can also use the moderation tools:

1. Edit the text of a topic or of a comment<sup>34</sup>
2. Delete a topic or undelete<sup>35</sup> a previously deleted topic (soft delete)
3. Delete a comment or undelete<sup>36</sup> a previously deleted comment (soft delete)
4. Close or (re)open a given topic
5. Pin the topic or pin the topic globally<sup>37</sup>

<sup>25</sup>Use the icons at the bottom to get Bold, Italic, List, URL (specify the link text and the link URL), Image (it is not possible to specify the image size because that is not supported by the Markdown markup, it is not possible to upload PNG images because of security risks, PNG images can only be uploaded in the CMS), File (upload a file), Poll (list of alternatives that the forum members can vote on and counting the votes that each alternative received), Preview (toggles between showing the markdown codes and the formatted text and images, just press twice to go back to editing the text). It is also possible to get more formatting options by using Markdown markup directly, the codes can be seen e.g. at <https://www.markdownguide.org>

<sup>26</sup>That is, change the topic text after it was published

<sup>27</sup>If one of the usernames does not exist then it will not be possible to publish that private topic until the error is fixed. Because a forum can have a large number of users there is no interface to see the usernames, the user that is creating the private topic must know the usernames of the users that he/she wants to invite to the private conversation

<sup>28</sup>If there is a problem with the topic contents, e.g. if it is considered SPAM or for any other reason.

<sup>29</sup>Twitter, Facebook or email

<sup>30</sup>Or remove a Like added previously

<sup>31</sup>Creates a comment that quotes the topic text

<sup>32</sup>Creates a comment that starts with @*username* where *username* is the user name of the user that created the topic (or the comment that is being commented)

<sup>33</sup>Add a comment to that topic

<sup>34</sup>If that is done the original user that created the text or the comment is still credited as having written that text, thus this should be seldom used and when necessary it should be made as sparingly as possible, just making the minimum number of changes.

<sup>35</sup>A deleted topic is supposed to only be recovered by the administrator, still it can also be recovered by the moderator if the moderator can login in the backoffice: login in backoffice, Spirit Topic / Topics / change checkbox "Is removed"

<sup>36</sup>As this might be a common task the comment is undeleted by using the moderation tools, not by using the backoffice

<sup>37</sup>This just affects the sort order: first come the globally pinned topics, then the pinned topics, the (normal) active topics come last

6. Move topic: this is done by selecting a given topic, pressing **edit**, changing the category to which it belongs, and then pressing **Update**
7. Move comment(s): within a given topic select one or more comments, then supply the destination Topic ID<sup>38</sup>

### 1.7.7 Administrator

The administrator has the same functionality as moderators and can also use the administration tools:

1. More than one user can be configured as administrator
2. Can configure forum settings; add, edit and deactivate user accounts; and can lock, create, and soft-delete Categories/Sub-categories<sup>39</sup>.
3. Initially there is only one category: *Uncategorized*. To create a category select *username* (at the top right) / **Admin** / **Show menu** (at the top left) / **Categories** / **Create category**, then provide a title, a description, if it is global<sup>40</sup>, if it is closed<sup>41</sup>, if it is removed, and the color<sup>42</sup>
4. Dashboard with simple forum statistics: number of forum Members<sup>43</sup>, number of Topics, number of Comments, number of Likes, number of Flags (number of member reports), number of Categories
5. Support for handling member *reports*: select *username* (at the top right) / **Admin** / **Show menu** (at the top left) / **Flags** / select a line and press **moderate** on the right. After processing the reports mark them as “*Is closed*” and press **Save**
6. Deleted, closed and pinned topics can be undeleted, opened or unpinned by selecting *username* (at the top right) / **Admin** / **Show menu** (at the top left) / **Topics** / choose the tab of **Deleted**, **Closed** or **Pinned** then click on the topic and press **Moderate**

### 1.7.8 How to use the forum

1. The administrator should create an initial list of categories, and each category can also have a specific color<sup>44</sup>
2. Just login, go to the forum and create a new topic or comment on a given topic, there is nothing more to it.

## 1.8 Providing Feedback (beta version of the public site)

There is special support for providing feedback on a given page of the beta version of the public part of the digital platform, i.e. the web site. While browsing the public part of the web site just press in the extreme right the light blue with white letters button with the vertical text Feedback. Then a form appears, you can add a comment or brief description of the issue, optionally provide an email<sup>45</sup>, select next, a screenshot of the page is automatically obtained, if relevant highlight

<sup>38</sup>The topic ID is an integer number, it can be seen in the backoffice by checking the **pk** (primary key) field in the Spirit Topic / Topics section. Because the topics are not supposed to be editable from within the backoffice all fields that appear there are marked readonly. This is a special feature that should be rarely used, that’s why it is not a problem to force the moderator to use the backoffice to find out the Topic ID.

<sup>39</sup>There are only two levels, categories and sub-categories, it is not possible to create sub-sub-categories

<sup>40</sup>Whether or not the topics will be displayed in the all-categories list

<sup>41</sup>No more topics nor posts nor comments can be added to it

<sup>42</sup>RGB (Red, Green, Blue) color in hexadecimal format prefixed by #, that is **#rrggbb**, for instance **#ff0000** means pure red.

<sup>43</sup>Number of users

<sup>44</sup>For the time being the initial set of categories is: 0-3 years (green), 3-7 years (blue), EU-SELF (red)

<sup>45</sup>If you are login the username will be attached to the report so the email is not necessary, but even if you are an anonymous user you can provide feedback without providing an email

one or more parts of the page (you can also black out parts of the page for privacy reasons), press next, review and complement the description and press submit.

This functionality also works if you are using a smartphone to browse the public site, thus allowing for feedback on the mobile version of the site. Sometimes in the mobile version, depending on your smartphone screen size, you might not see the checkmark at the top right of the form that allows aborting a feedback form without submitting it, in that case if you want to abort the feedback without submitting it just reload the page and the feedback form disappears.

## 1.9 Need for Name Conventions

If too many documents and images are uploaded with random titles and random tags (that is, titles and tags selected by each user without any directives), then the digital platform might become messy and it might be difficult to locate the document or image that we are looking for.

Thus it is important to choose appropriate titles using a standardised name convention otherwise it might be difficult to find documents or images without browsing and seeing all of them.

As such it is suggested that the project partners and contributors agree on an appropriate name convention (format of the title of the documents and images) before too many images and documents are uploaded to the digital platform. The same applies to the choice of tags, the project partners and contributors should agree on a predefined set of tags that should be used whenever appropriate otherwise if each user defines his/her set of tags there will be partial overlap.

This definition can wait a little until a few documents and images are uploaded to the platform and a few tags are added, so that the problem becomes more apparent, and only then to define the name convention to use for documents, images and tags. This should not wait too long because all the existing documents, images and tags will need to be manually renamed to comply with the new name convention.

## 1.10 Public Web Site Main Sections

The digital platform is currently configured to show this set of sections in the public web site:

- **Home page:** provides access to the remaining sections. It includes an invitation for people to contribute. The home page can also be accessed by clicking on the project logo at the top left
- **About / EU-SELF Project:** Information about the EU-SELF project
- **About / Who's Involved:** Information about the EU-SELF project partners, showing them with markers on a map and allowing more detailed information about each partner to be displayed either by clicking in the map markers or by navigating in the list. For map markers that are too near each other or that are coincident, the marker allows access to the detailed information of more than one partner
- **Assessment Measures:** a list of selected assessment measures related to children's social and emotional skills development. Although the Assessment Measures have a country of origin it was decided in this case to not place them into a map and to just show them in a list
- **Country Overviews:** the list of country overviews that can be browsed using the markers in the map or navigating in the list
- **Programs (Good Practices):** the list of programs with a map marker placed in the capital of the country of origin of that program, the details can be seen by clicking on the markers in the map or by navigating in the list



- **Publications:** the list of public documents uploaded to the digital platform. The documents are organized in two groups, public documents and partner documents, only the public documents can be seen in the public web site, the partner documents can only be seen through the CMS (a login is required)
- **Blog:** the project Blog
- **Contact:** contact information
- **Forum:** the project Forum, only registered users can see the discussions taking place in the forum

The web site is responsive and should work well in a desktop computer and in a tablet or smartphone.

## 1.11 How to do common tasks in the Digital Platform

A Contributor is an user that is simultaneously a registered user and has the permissions of an Editor. This section summarizes how to do common tasks that are likely to be needed in the digital platform and that are relevant to Contributors (not all of these tasks can be made by a Contributor). In the items below it is assumed that the user is of the type presented between parenthesis (that is, the user is already login as that kind of user):

1. **Create a blog post and submit it for approval (CMS editor):** go to the CMS, select “Pages / *the arrow at the right of EU-Self Top Page LIVE+DRAFT* / *click on Blog posts LIVE + DRAFT*”, press the button “+ ADD CHILD PAGE”, then select by clicking “*Blog page*”, and a form with several fields to be filled-in appears. After filling at least the mandatory fields, at the *top right* press the smartphone button (as soon as you hover over it it will say **Preview**), this will make appear a subwindow at the left, press the *smartphone* button to see how the blog post will look like in a smartphone, press the *tablet* button to see how it will look like in a tablet, press the *monitor* button to see how it will look like in a computer monitor, or press the  $\sphericalangle$  button to see it in a separate tab in your browser.

After doing that in the green button at the bottom, select **SAVE DRAFT** (if you want to complete it later) or **SUBMIT TO MODERATORS APPROVAL** (if the blog page is ready to be reviewed by the moderator).

The information placed in the fields “**Internal information partner:**” and “**Internal information blog theme:**” is for internal use only, it will be added to the “Report / Existing Blog Themes” to help avoiding excessive repetition in the blog posts.

For more detailed information on how to fill in a blog post see Section 1.6.1 on page 8, see also Section 1.6.2 on page 9 on how to review and publish a blog post.

2. **Add a video to a blog page (CMS editor):** when filling in the body of the Blog page insert the item marked with a *play triangle* (its tooltip is **Embed**), is it the 6th icon counting from the right. Then in the window that appears insert the URL of the video (e.g. Vimeo or YouTube). If we want to insert a link for an audio or a video file previously uploaded to the CMS (see next item) then insert the item marked with a *chain link* (its tooltip is **Link**), it is the 5th icon counting from the right, in the popup window that appears select “**External link**” (the “**Internal link**” functionality is to link to another Page not to an audio or video file) and in the URL put the address that you got in the CMS by selecting **Media**, locating the row with the relevant video or audio entry, placing the mouse cursor over the **File name**, right clicking and selecting copy link address.
3. **Upload a video file or an audio file to the CMS (CMS editor):** select “**Media / + ADD VIDEO** or **+ ADD AUDIO**” as appropriate, then in the appearing form fill-in the Title, in the **Filename** choose the file (for instance a .MP4, .MP3, or .WAV file), and choose a

Collection. Optionally provide the duration in seconds, a thumbnail and one or more tags (in the case of a video file it is also possible to provide the width and height). For the time being although it is possible to upload video and audio files, the files will not be visible in the public site (later on the video files will probably be uploaded to Vimeo and accessed from there). Thus this functionality is mostly here to act as a repository of audio and video files created within the project (it is possible to use them in blog posts, see the previous item). As of now the audio or video file cannot exceed 20 MB of size (20 971 520 bytes), this value can be increased if the need arises.

4. **Obtain Excel file with report containing list of existing blog themes (CMS editor or moderator):** go to the CMS, select “Reports / Existing blog themes” and then at the top right click on “DOWNLOAD XLSX”. The downloaded file is called `spreadsheet-export.xlsx` and it contain 3 fields: Post Date, Internal Information Partner, Internal Information Blog Theme.
5. **Create forum topic (registered user):** go to the Forum, at the top right click on **Create Topic**, fill-in the **Title**, choose a **Category** from the existing list, fill-in the **Comment** with the first comment in the conversation and press **Publish**.
6. **Create private forum topic (registered user):** go to the Forum, click on your username at the top right, then click on **Private topics**, and then click on **Create private topic**, fill-in the **Title**, the comma separated list of users that you want to invite to that private conversation, fill-in the **Comment** with the first comment in the conversation and press **Publish**.
7. **Comment on forum topic (registered user):** go to the Forum, click on a topic name, write the comment, and press **Publish**. See also item 4 in Section 1.7.5.
8. **Comment on private forum topic (registered user in the list of invited users):** go to the Forum, click on your username at the top right, then click on **Private topics**, and then click on the topic name, fill-in the **Comment** and press **Publish**.
9. **Create a forum category (administrator only):** go to the Forum, click on your username at the top right, then click on **Admin**, and then on the left click on **Show menu**, click on **Categories**, and then on **Create Category**, choose the **Parent** from the list, fill-in the **Title** and the **Description**, choose a color by providing its value in RGB in hexadecimal (`#RRGGBB`) and press **Save**.
10. **Provide feedback on beta or development version of the web site of the digital platform (anonymous or registered user):** while browsing the public part of the web site just press in the extreme right the light blue with white letters button with the vertical text saying Feedback, a form appears, fill the form and press submit. For more details see Section 1.8
11. **Upload a public document (CMS editor or moderator):** select “Documents / + ADD A DOCUMENT”, then drag and drop the document or press “+ OR CHOOSE FROM YOUR COMPUTER”, and select “Add to collection:” **public**. There is no hard limit on the document size but documents that are too big should be avoided. The maximum filename length is 100 characters (files with names longer than that cannot be uploaded).
12. **Upload a private document (CMS editor or moderator):** select “Documents / + ADD A DOCUMENT”, select “Add to collection:” **partners**, then drag and drop the document or press “+ OR CHOOSE FROM YOUR COMPUTER”. The document will be listed in the web site but a login will be required to download it. There is no hard limit on the document size but documents that are too big should be avoided. The maximum filename length is 100 characters (files with names longer than that cannot be uploaded).

13. **Create a new document collection (administrator):** select “Settings / Collections / + ADD A COLLECTION”, then select the collection name and the collection “Parent” (usually Root), and press SAVE. After the collection was created go to “Settings / Collections”, click on the collection name, then at the top click on the Privacy setting and choose one of:
  - (a) Public
  - (b) Private, accessible to logged-in users
  - (c) Private, accessible with the following password
  - (d) Private, accessible to users in specific groups

All documents added to that collection will get those privacy settings. At the moment there are 3 collections: **Root**, **public**, **partners**; the documents assigned to the collection **partners** will not appear in the “Publications” section of the public site
14. **Upload an image (CMS editor or moderator):** select “Images / + ADD AN IMAGE”, then drag and drop the image or press “+ OR CHOOSE FROM YOUR COMPUTER”, and select the collection to add it to, the image title, and add one or more image tags (use a comma to separate image tags). The image can from then on be used for instance in the blog pages. The supported image formats are GIF, JPEG, PNG, WEBP<sup>46</sup>, the maximum image size is 10 MBytes.
15. **Change the user password (registered user or CMS user):**
  - (a) If you are a CMS user go to the CMS, click on the username at the bottom left, **Account settings**, and then provide the **Old password** and the **New password** followed by **New password confirmation** and then press **SAVE ACCOUNT DETAILS**
  - (b) If you are a Forum user<sup>47</sup> go to the Forum, click on the username at the top right, **Profile / Preferences**, change password, and then provide the **Old password** and the **New password** followed by **New password confirmation** and then press **Change my password**
16. **Reset an user forgotten password (administrator):** go to the CMS, click on “Settings / Users”, click on the user name or search<sup>48</sup> for it, put the new password in the **Password** and in the **Password confirmation** and press **SAVE**.
17. **Change the user profile picture (CMS user):** go to the CMS, click on the username at the bottom left, **Account settings**, and then **Upload a profile picture**<sup>49</sup>.
18. **Change the user email (CMS user):** go to the CMS, click on the username at the bottom left, **Account settings**, and then **Email**.
19. **Change the list of blog categories (administrator):** go to the CMS, select “Snippets / Blog categories” and then either edit the existing blog categories or add a new blog category by pressing “+ ADD BLOG CATEGORY” at the top right. The blog categories will appear as checkboxes when creating a new “Blog page” (blog post).
20. **Create a poll<sup>50</sup> in the forum (registered user):** go to the Forum, select the appropriate Topic or create a new Topic, and then in the Comment click on the small graphic icon at the bottom left (it is the second counting from the right) and then change the descriptions that appear as appropriate. See also item 14 in page 12.

<sup>46</sup>WebP is an image format employing both lossy and lossless compression, along with animation and alpha transparency. Developed by Google, it is designed to create smaller or better-looking images compared to the JPEG, PNG, or GIF image formats.

<sup>47</sup>If you are a CMS user it is also possible to change the password using the Forum interface instead of using the CMS interface

<sup>48</sup>Contrarily to the public web site here the search functionality is already enabled.

<sup>49</sup>If no picture is uploaded and that email is associated with an account in [www.gravatar.com](http://www.gravatar.com) then that picture avatar will be used

<sup>50</sup>List of alternatives that the forum members can vote on and counting the votes that each alternative received

## 1.12 Bugs and current limitations

These are the currently known problems (whenever there is a workaround it is presented here):

1. **Feedback of Home Page in Android Smartphone:** the support for providing Feedback (see Section 1.8 and item 10 in Section 1.11) works OK in a desktop browser (even if we reduce the window width to the minimum) but in an Android Smartphone (browser Chrome or browser Firefox) it might be difficult depending on the screen resolution to see the whole feedback window. **Workaround:** go to the page in portrait mode, switch to landscape mode, scroll to the right, click on the feedback button, switch back to portrait mode, fill-in the feedback form and submit it.
2. **Feedback of Home Page in iOS Smartphone:** the support for providing Feedback (see Section 1.8 and item 10 in Section 1.11) does not seem to work in an iPhone. The first window (initial text with description of the issue) and second window (highlight or hide portions of the screen) appear OK but after switching to the last window (review description text and submit form) the window disappears thus it is not possible to submit the feedback form
3. **Searching in the Forum:** if you try searching in the Forum for contents that are too new you might get the error “*There are no search results*”, this is because the new contents will only be found after the forum contents are reindexed by a task that is periodically run.

## 1.13 Subject Index

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