GUIDELINES for TaxEdu content management:

Roles description and user guide

For Registered users

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1. Introduction

The goal of the document is to provide to users of TaxEdu Portal a guideline on how to use the interactive features. The users of TaxEdu Portal have permissions based on the user group they are belonging to. There are three user groups: **Visitors**, **Registered users** and **Administration users.**

The document is organised to provide a first overview of the roles and general functionalities and then to dive into the description of the interactive features.

This document can be accessed on TaxEdu Portal on the page **About TAXEDU**:

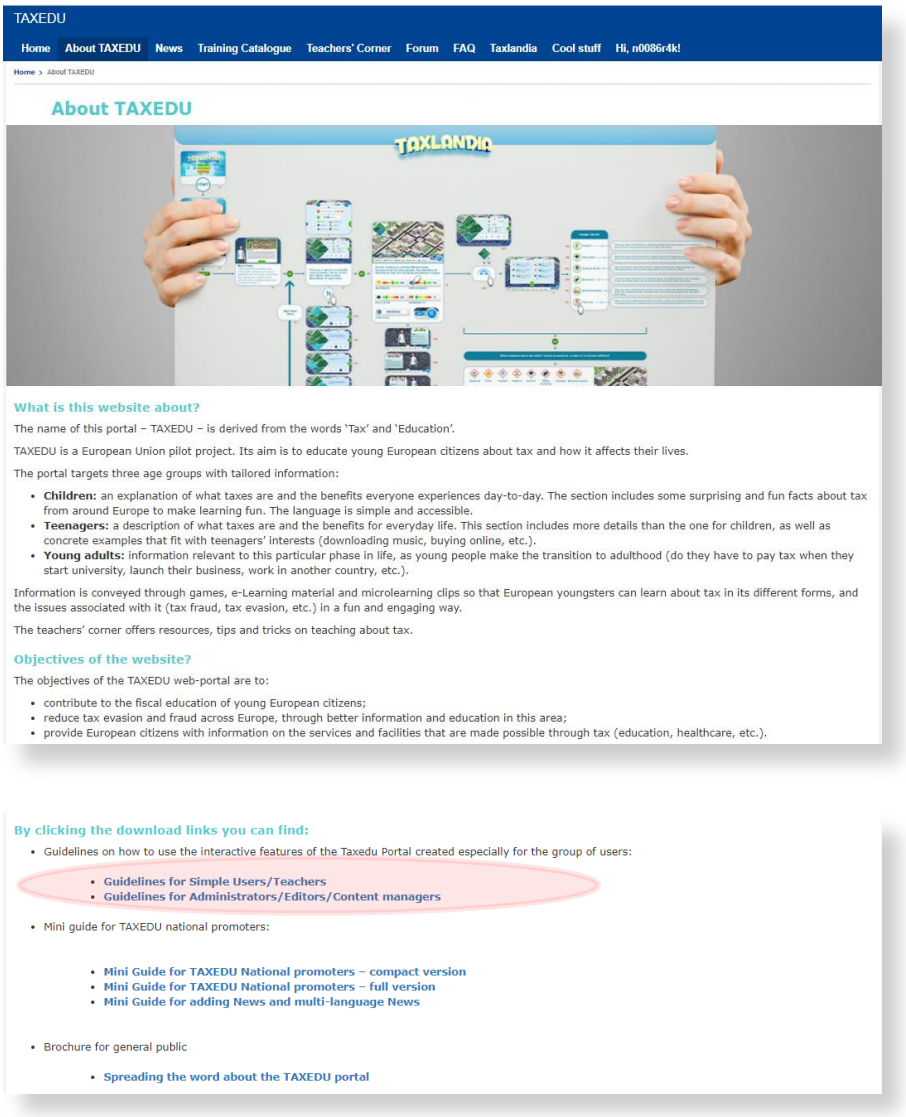


Figure 1 - TaxEdu Portal: About TAXEDU page

2. Roles

There is a hierarchy of roles. Starting from the Visitor going up to the Webmaster, each role has the rights to perform the tasks of the lower role (in terms of permissions granted) plus some other specific rights depending on his/her role.

For the sake of clarity please find below the list of roles, clustered per group, starting from the lowest role in terms of rights granted and finishing with the highest:

- Visitor
- Registered users
    - Simple user (registered using EU Login)
    - Teacher (assigned by DG TAXUD)
- Administration users
    - TaxEdu editor (assigned by DG TAXUD)
    - Webmaster (assigned by DG TAXUD)

3. Functionalities

The portal is meant to have interactive features for **Registered users** and the various levels of **administration** roles based on the permissions granted to each role. Please find below the complete list of these features:

- Account management
- News and Events
- Newsletter
- FAQ
- Content upload on the Training Catalogue and Teachers' corner sections
- Forum
- TAXLANDIA (to play online / download the app)
- Cool stuff
- Contact support

Before describing the possible tasks per role we will shortly introduce the **TaxEdu** Portal's functionalities:

3.1 Account management

To have access to the interactive features of the TaxEdu portal the first step is to register to the Portal. The registration is done using the **EU Login** service which is a common utility used to access the European Commission WEB sites.

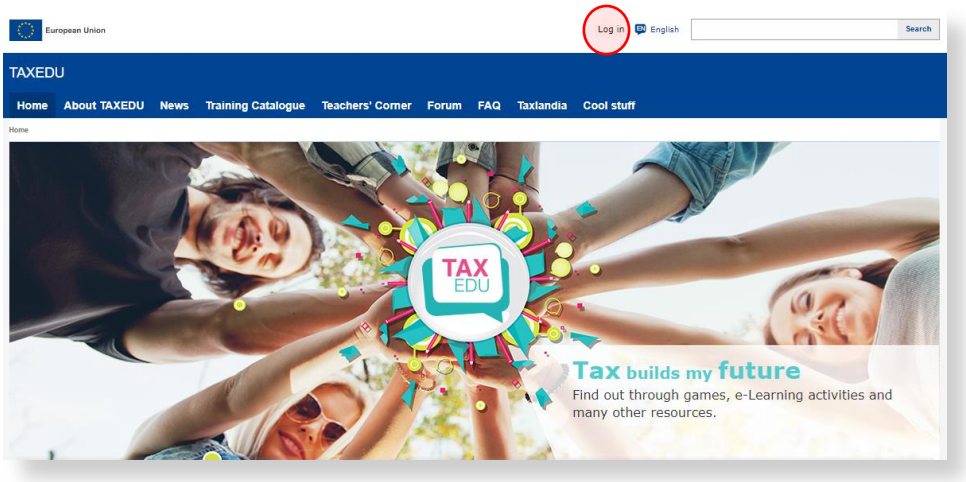


Figure 2 - "log in" menu

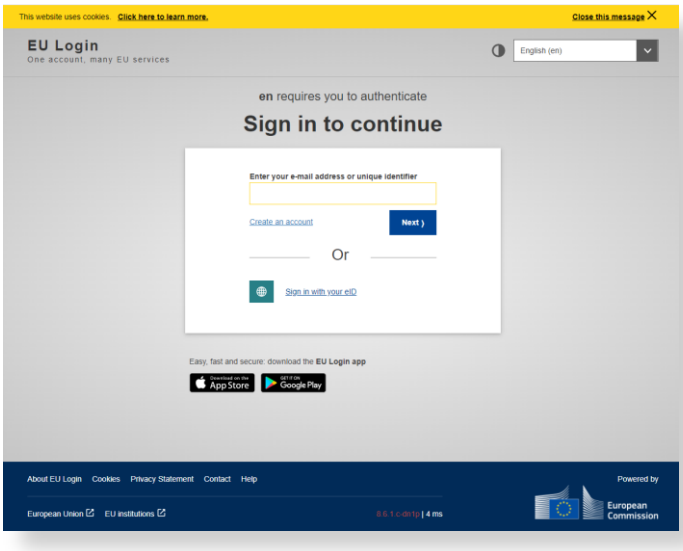


Figure 3 - "EU Login" service window

Once registered with the **EU Login** service, you are directed back to **TaxEdu** Portal and you can see and edit your user profile in the "**My account**" section, accessible through the menu on the upper right corner of the window.

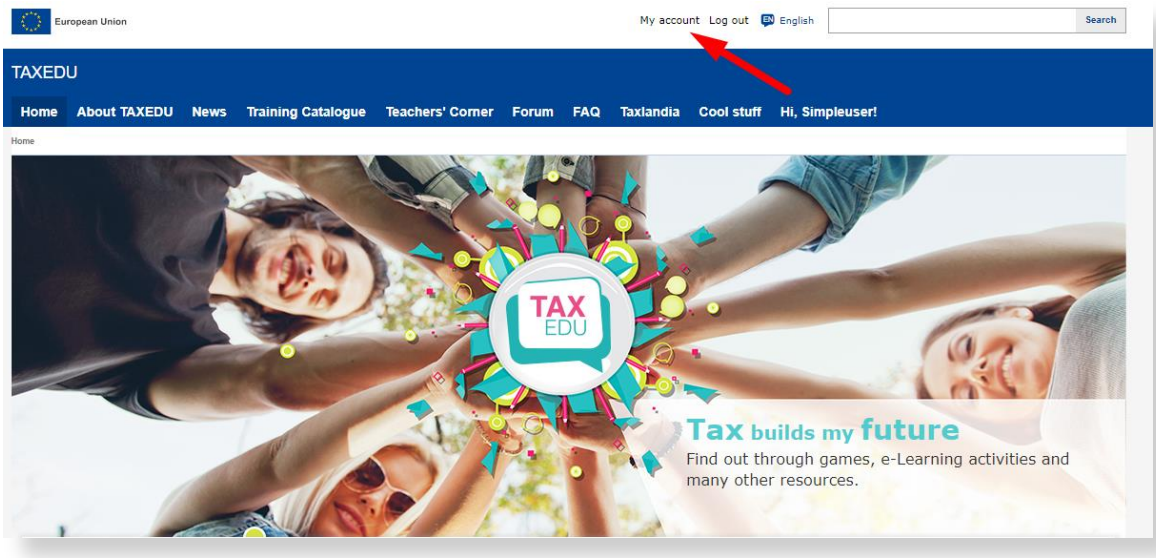


Figure 4 – Registered (simple) user's menu

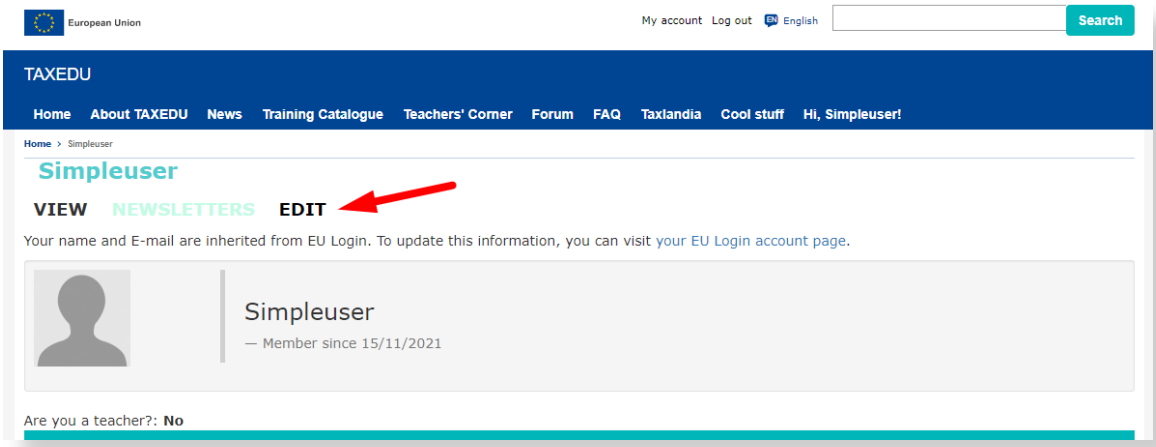


Figure 5 – My account window

In order to be assigned a **Teacher** or **TaxEdu Editor** or **Administrator** role, you have to send a request to **TaxEdu's HELPDESK**. The request should be sent by email through the following mailbox: taxedu@b-train3.eu. For more information regarding the creation of an account and requesting permissions for **TaxEdu Portal** please refer to Chapter 4.

3.2 News and Events

The "**News and Events**" section of **TaxEdu**'s Homepage can be accessed in mode view by all users (all roles). Nevertheless, only the users with administrative roles are allowed to upload **NEWS** articles there.

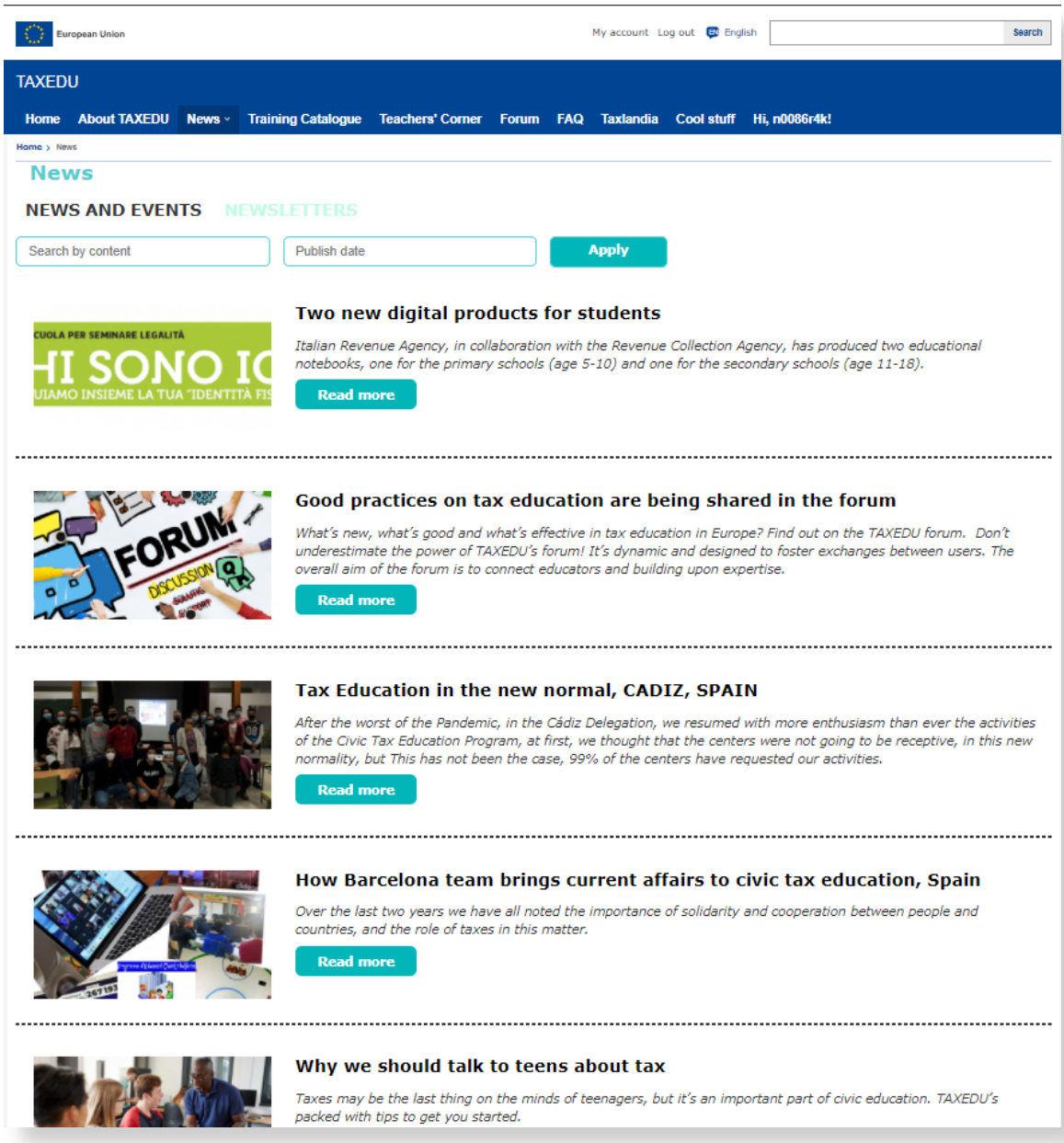


Figure 6 - "News and Events" section window

When accessed, the "**News and Events**" window displays articles with a cover image, a title, a short description and a "**Read more**" button. When you click on the "**Read more**" button, the content of the "**News**" article is displayed on the screen.

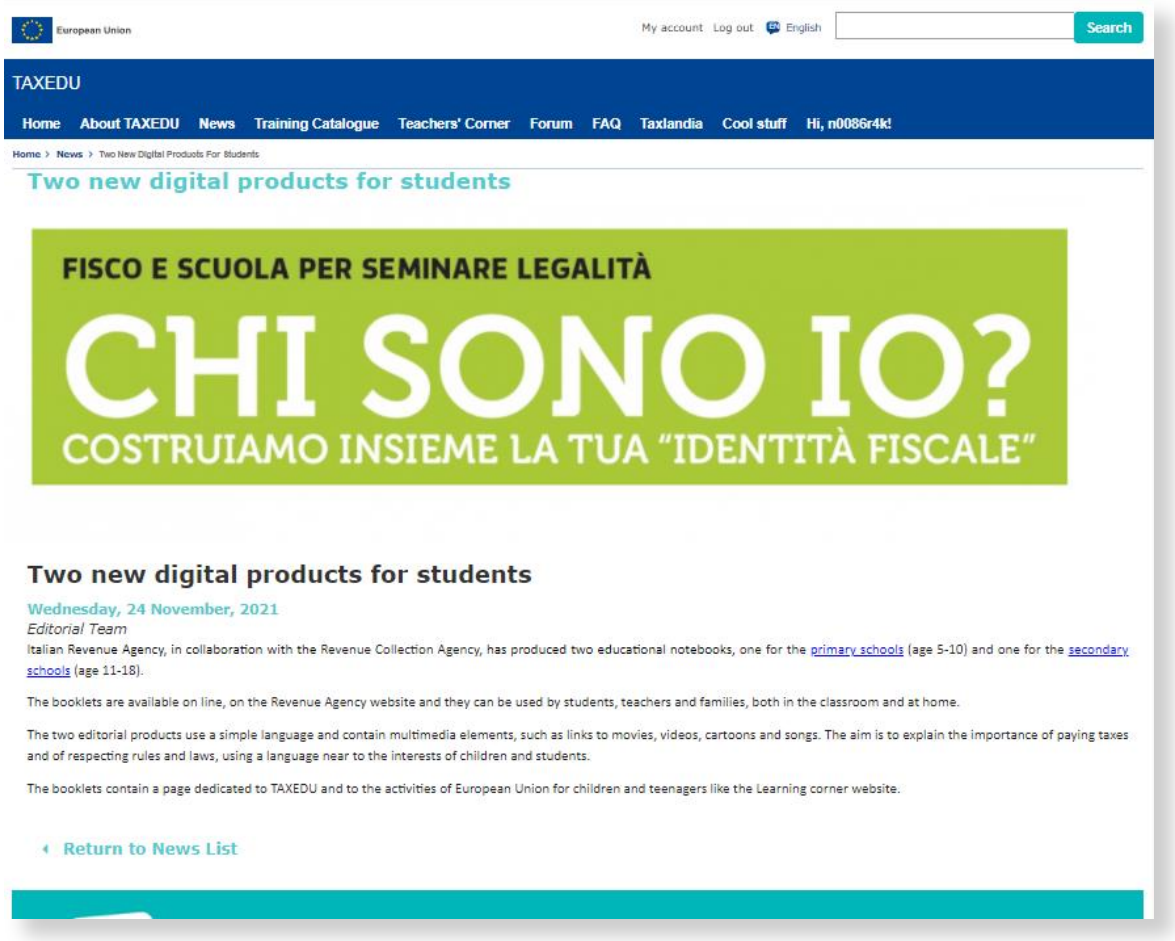


Figure 7 - Display of News and Events articles

3.3 Newsletter

All registered users can subscribe to the **NEWSLETTER** using the "**My account"** menu item as shown in the figure bellow

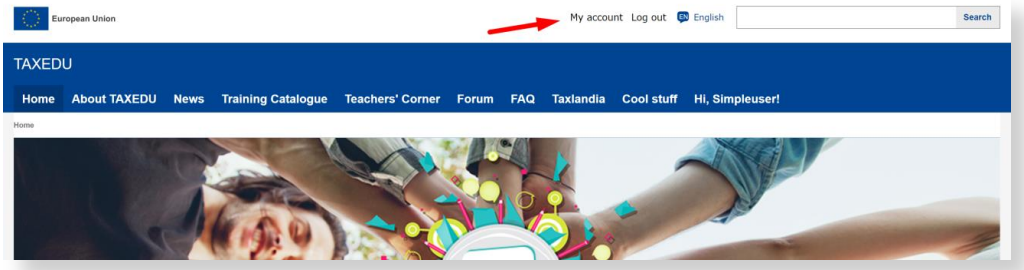


Figure 8 - Accessing "My Account"

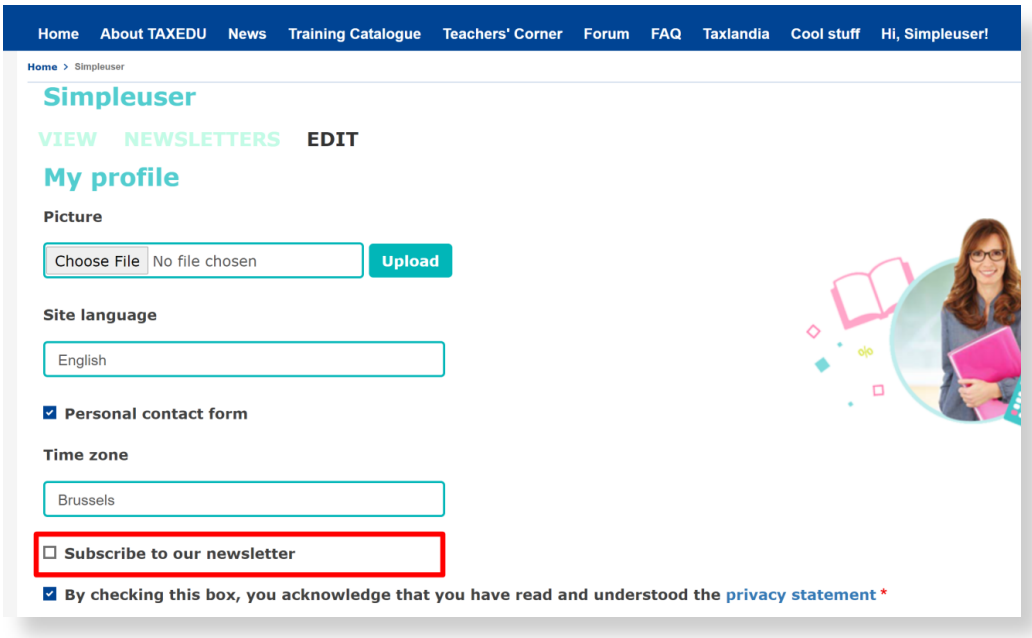


Figure 9 - Manage subscription from "My Account"

Select the check box "**Subscribe to our newsletter**" and then push the **Save** button.

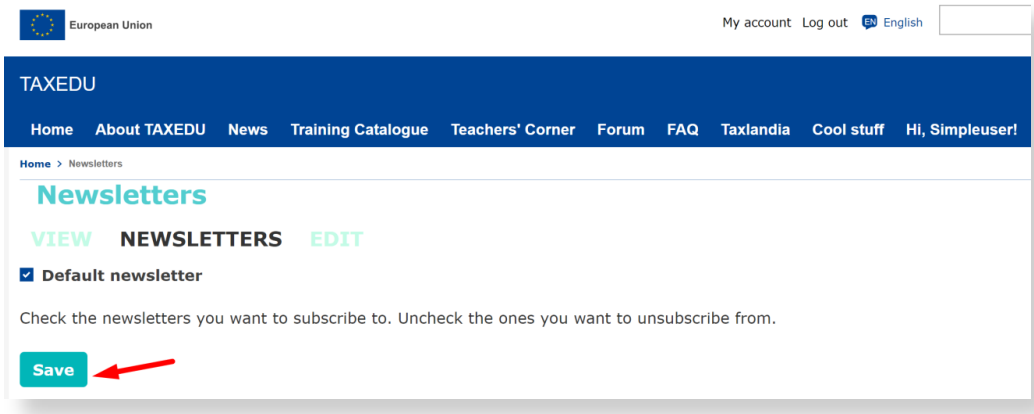


Figure 10 - Save subscription to NEWSLETTER

Another method to subscribe to the **NEWSLETTER** is to click on **subscribe** field available on the Footer (as shown bellow).

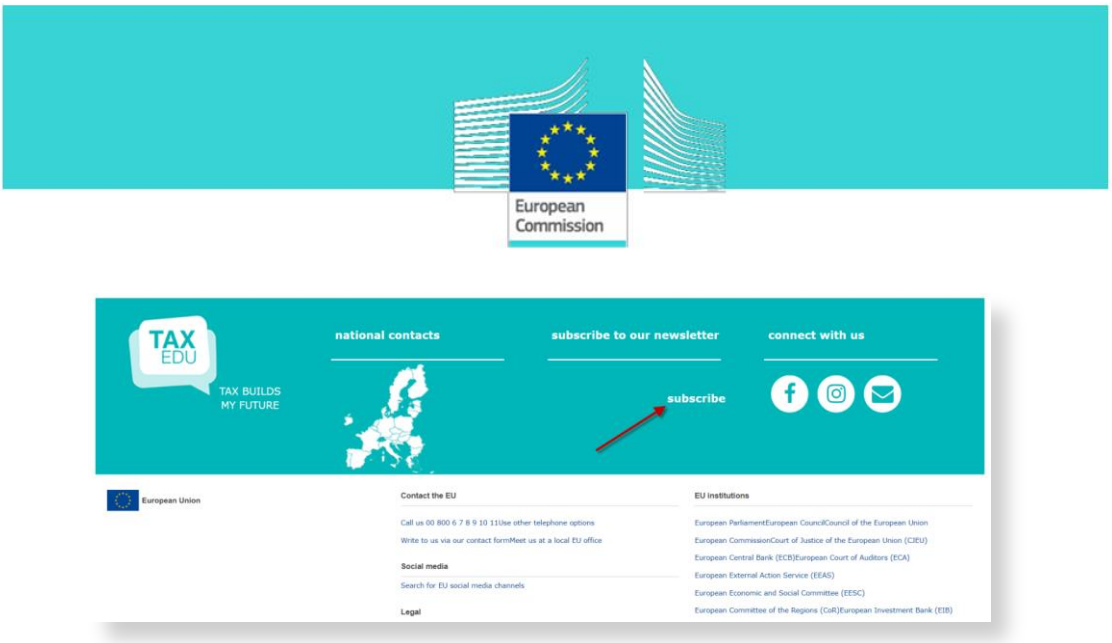


Figure 11 - TaxEdu Portal footer: "subscribe to our newsletter"

3.4 FAQ

The **FAQ** section is accessible to all the users in read mode. The management of the content of the **FAQ** page is granted only to the webmaster role.

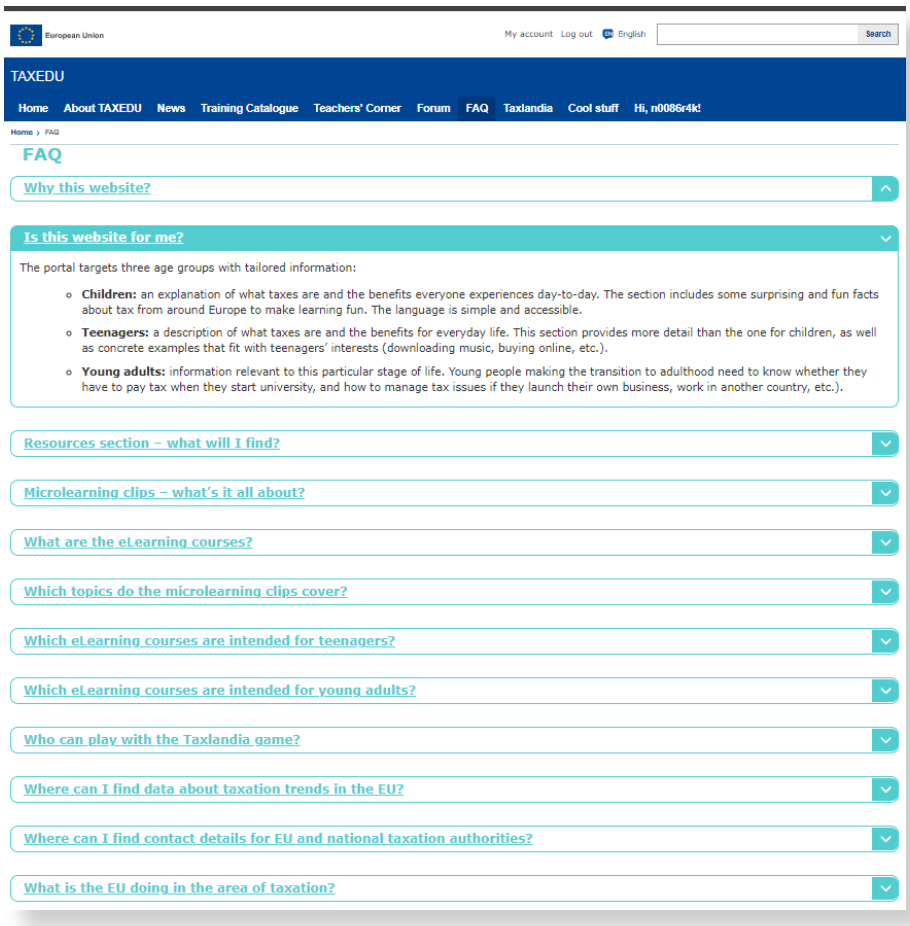


Figure 12 - TaxEdu Portal: FAQ section

3.5 Content upload

The TaxEdu Portal has three sections designed to host content:

- Training Catalogue
- Teachers' corner
- Cool stuff

Training Catalogue

This section is dedicated to all users. It is a library of educational content produced within the TaxEdu Pilot project (by the administrators) and resources proposed by teacher users and approved by TaxEdu Editor users. The "Training Catalogue" page displays all types of loaded resources excepting Lesson plans and Story boards. It contains also a subsection named "National useful links" on witch additional material produced at national level can be accessed.

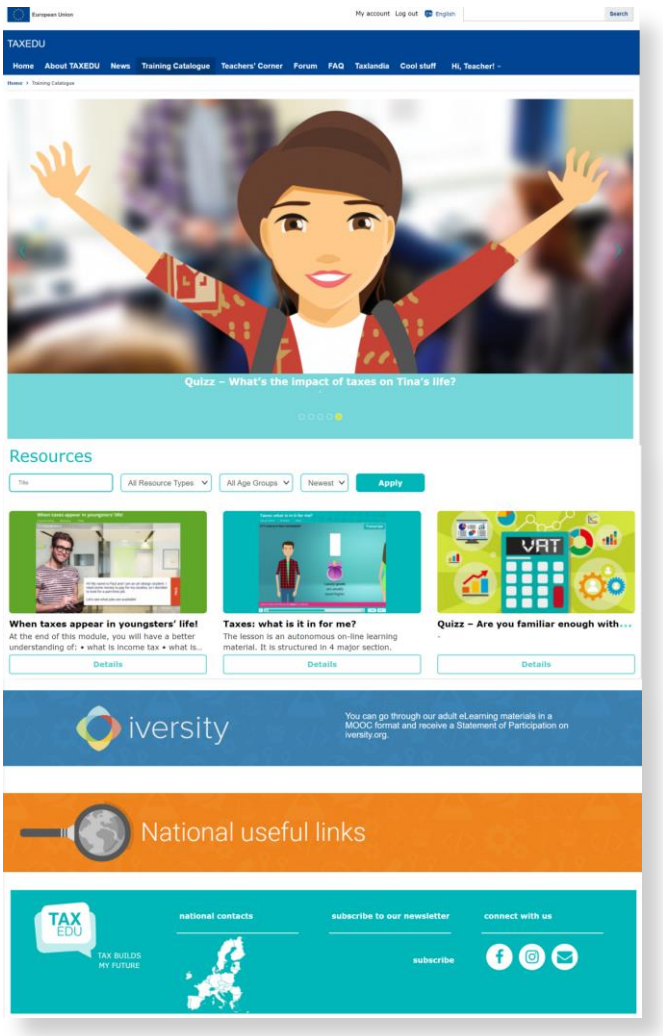


Figure 13 -TaxEdu Portal: "Training Catalogue" page

Teachers' corner

This section is dedicated to the teachers' community. The registered users can propose content to be uploaded here. Before the proposed content is published a **Taxedu Editor** or **Webmaster** approval is required. In this section the educational content is presented with additional explanations and tips on how to use it in class.

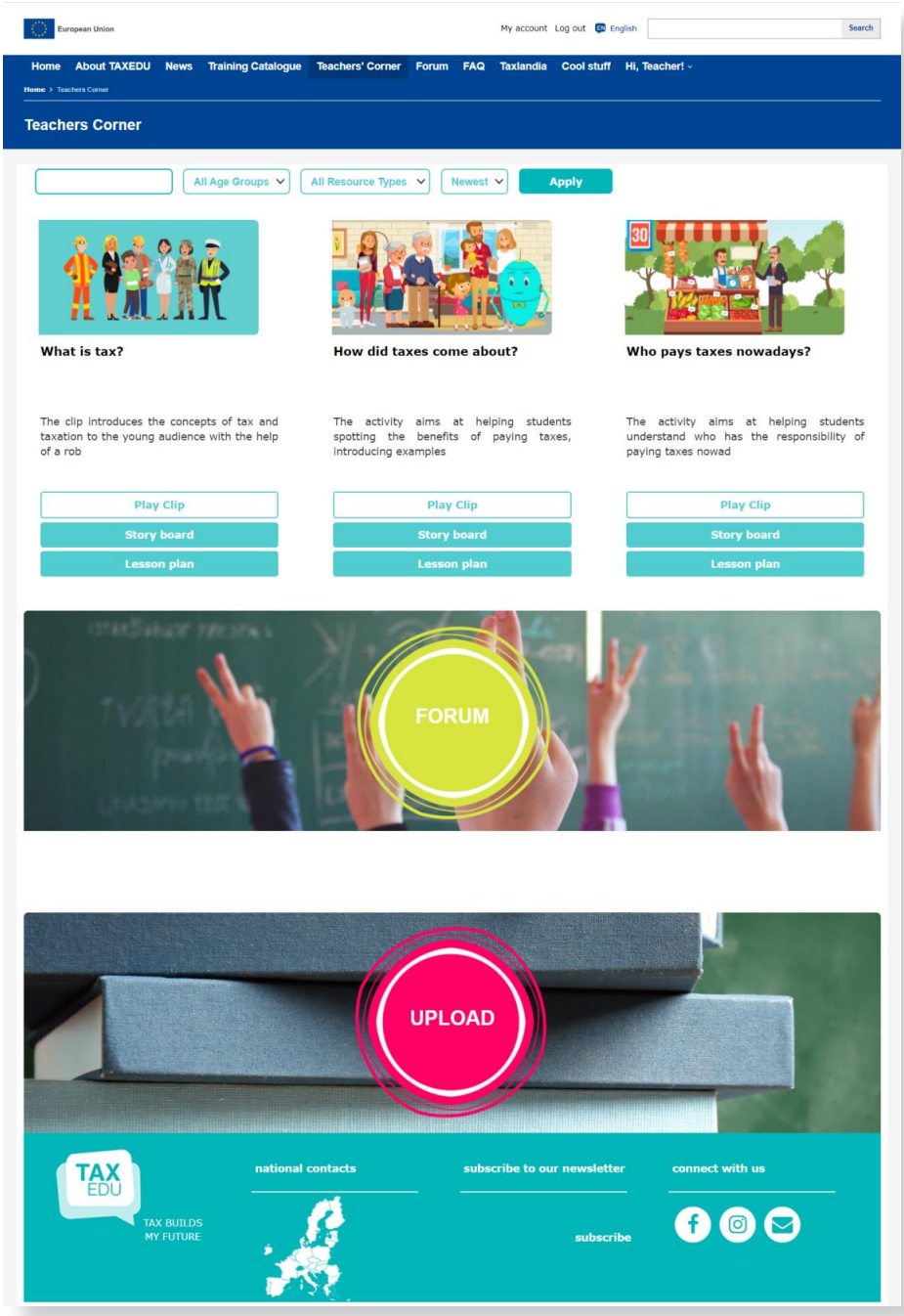


Figure 14 - TaxEdu Portal: "Teachers' corner" page

Cool stuff

This section was designed to host visual materials produced within the **TaxEdu** communication campaigns for explanatory and supporting purpose.

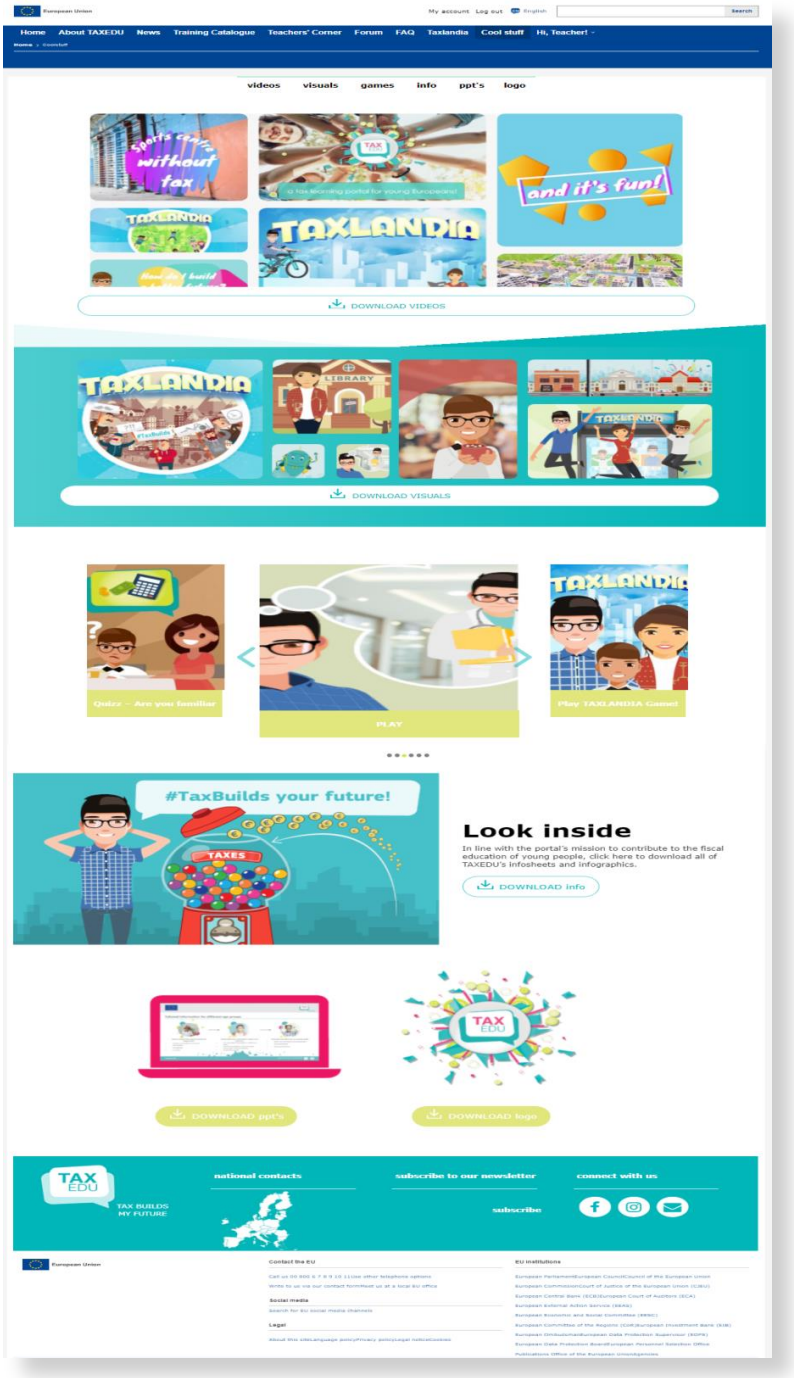


Figure 15 - TaxEdu Portal: "Cool stuff" page

Upload functionality

Users can add content to the portal using the "Upload" link. The permission to perform this task is assigned to **Teachers**, **TaxEdu Editors** and **Webmaster** roles. Users can upload eLearnings and video material using this functionality.

The **visitors** and **simple registered user** does not have the right to upload content on the **TaxEdu** Portal, they only have the right to view it. When a user who does not have content upload rights clicks the "Upload" link, the system displays the message shown below:

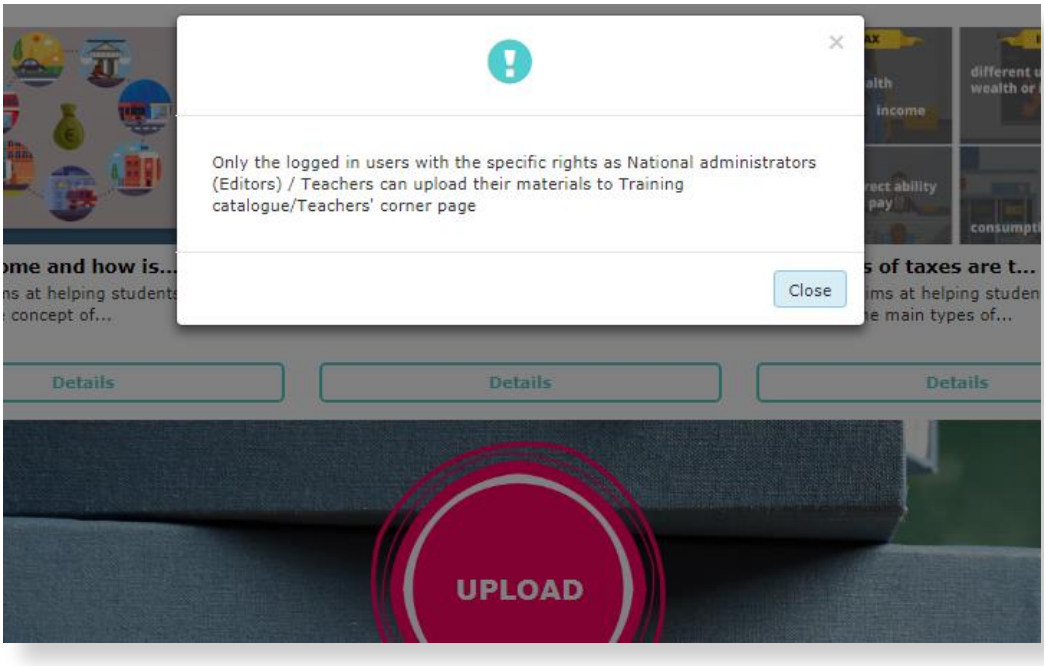


Figure 16 – UPLOAD "Access denied" message

The **teacher** can request the publication of content in "**Training Catalogue**" and "**Teachers' corner**" section through a specific interface upload form. The details of this task will be described in the following sections.

The resources proposed for publication will be reviewed by the **TaxEdu Editors.** They have the decision to publish the proposed content or to ask for adjustments before publication. The **TaxEdu Editor** role has the permissions to manage the content (edit, publish, not publish).

The **TaxEdu Editor** can also publish his own content on both the "**Training Catalogue**" and "**Teachers' corner**" section. It is important to highlight that, once the **TaxEdu Editor** publishes some of his own content, it can be unpublished, edited, deleted using "**Needs Review**" section, like any other content published by a **Teacher**.

Only the **webmaster** can upload content on the "**Cool stuff**" page and the "**National Resources**" section.

3.6 Forum

Visitors can see the **Forum** content but not interact with it; registered users can post comments; **TaxEdu Editors** can also moderate and add Forum topics. The addition of new forums is a permission available only for the webmaster.

The Forum is not divided per language and all **TaxEdu Editors** have a moderator role in it.

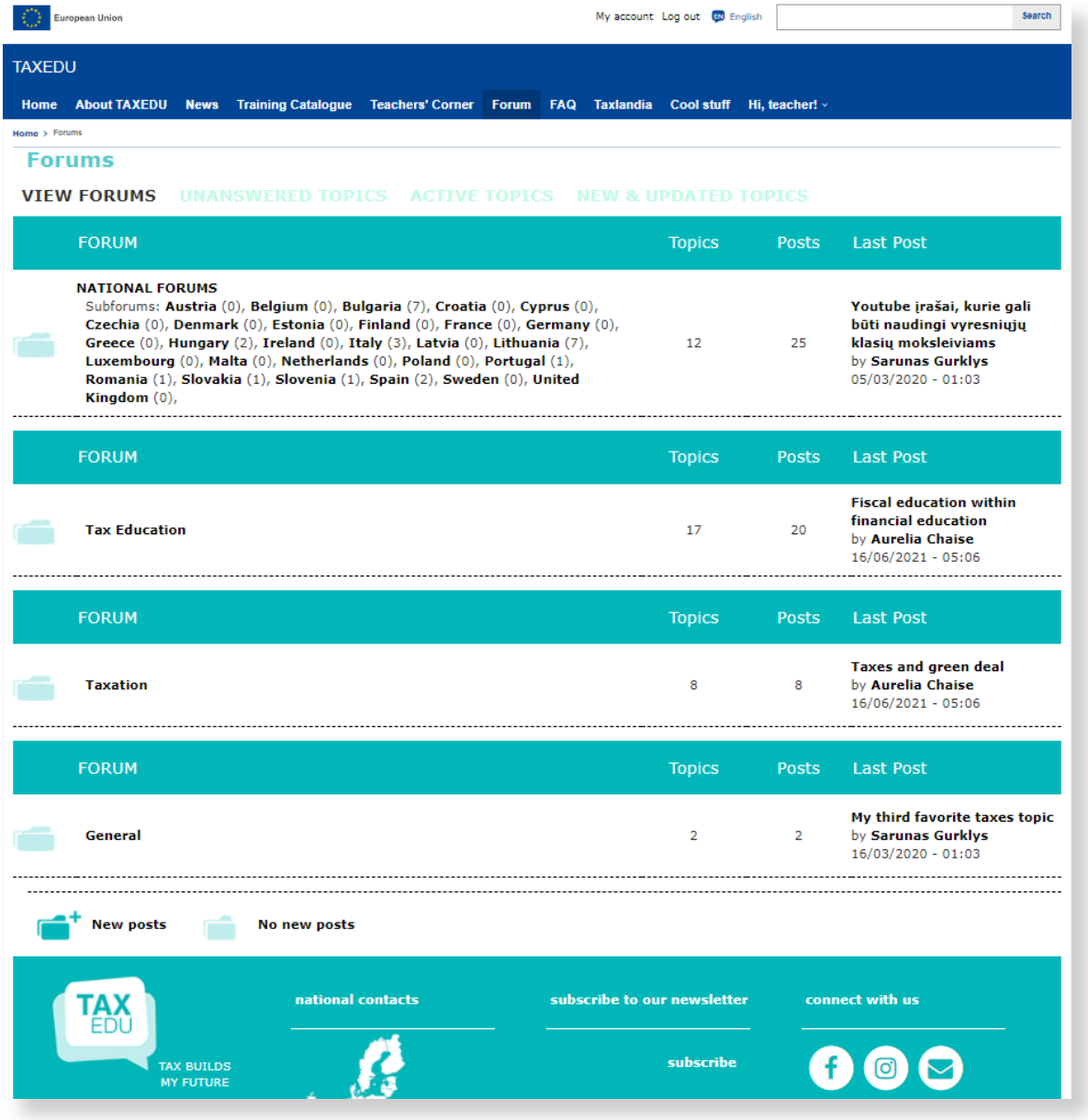


Figure 17 - TaxEdu Portal: "Forum"

3.7 TAXLANDIA

"TAXLANDIA" is an educational simulation game that explains and promotes tax education. The game is offered in 22 language versions. During the game, the player understands the tax mechanisms and the way they are collected. The game has also a tutorial that helps the player make the best decisions.

The game can be played online. The user has to click on "**play online**" button, from "**Tax can be fun**" region on Homepage or he can download the game on his device. The user has to click on "**download the app**" button, from "**Tax can be fun**" region on Homepage.

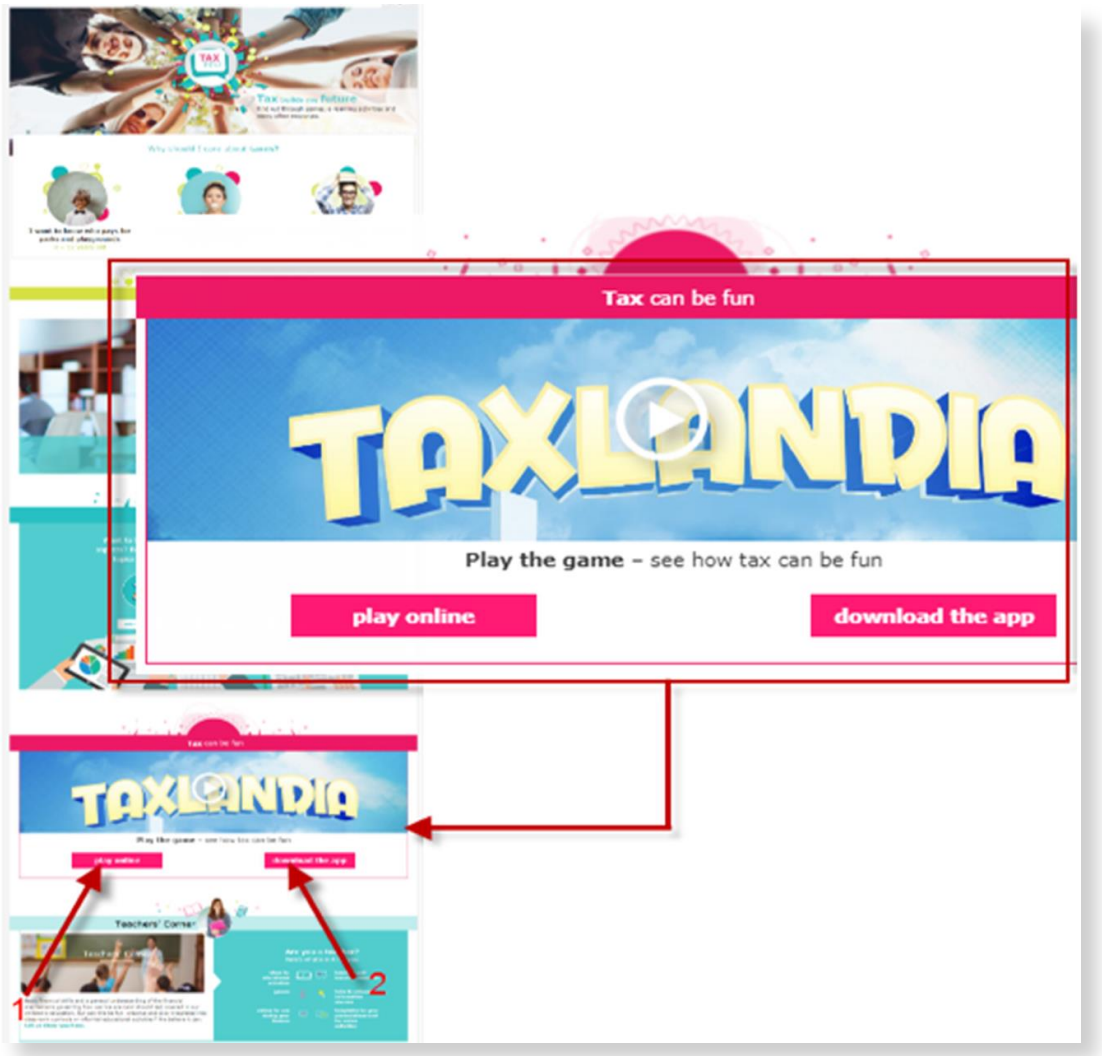


Figure 18 - TaxEdu Portal: "TAXLANDIA" section (on Home page)

More details regarding "**TAXLANDIA**" application, as achievements, hints and tips, supported platforms, language versions, etc can be reached in the **TAXLANDIA** page, which is displayed by clicking the "**download the app**" button from "**Tax can be fun**" region of the Homepage. In that

page the user can find the "**download Taxlandia**" link. In order to report a problem with TAXLANDIA application you can use the link available on the page. It will open a form where you can to report problems or app-related suggestions.

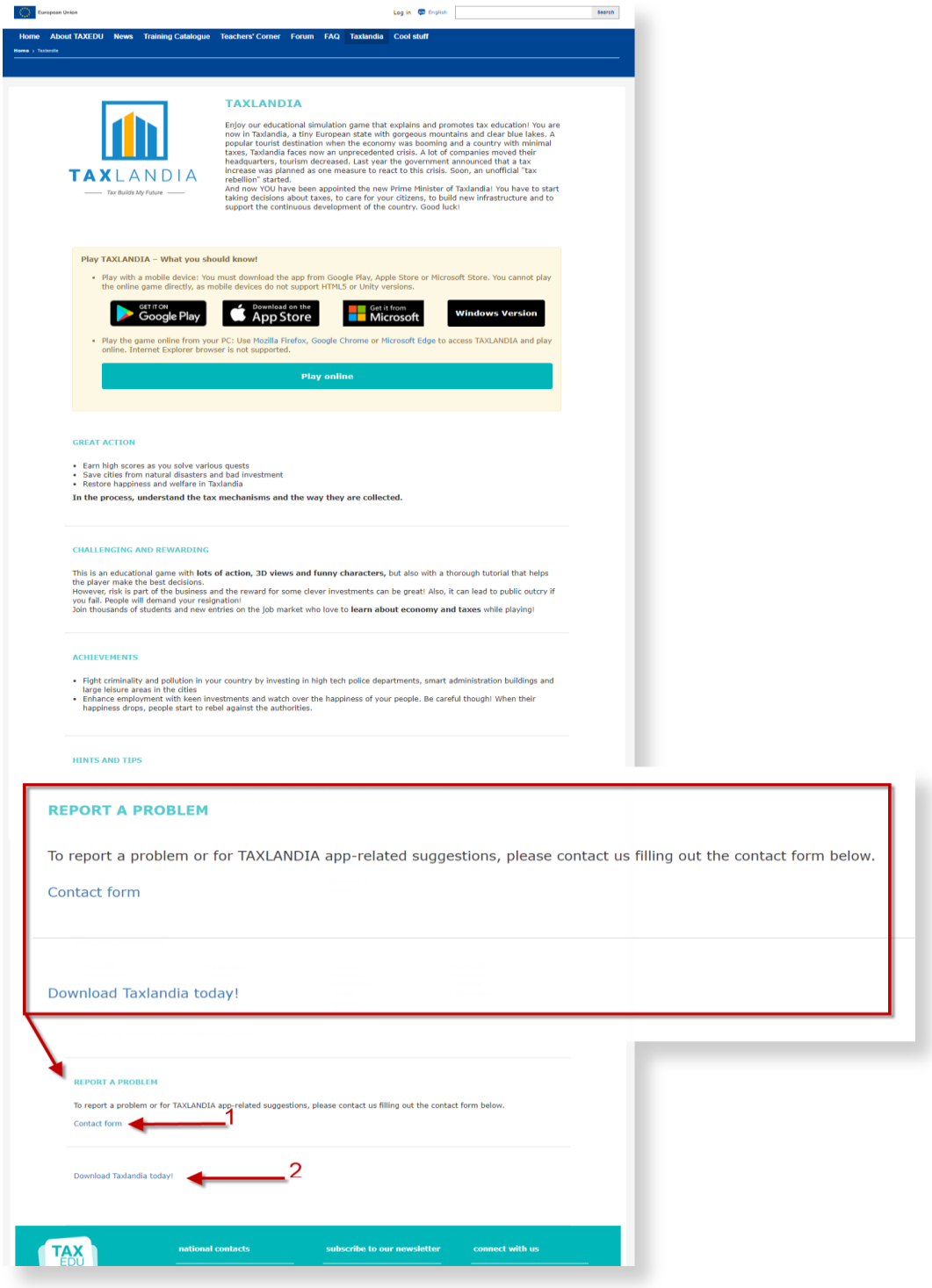


Figure 19 – "Download Taxlandia" and "Contact form" links on "TAXLANDIA" page

3.8 Contact support

This feature allows the communication between the users and the **HELPDESK**. This functionality offers the possibility to contact the **TaxEdu** team by clicking the mail icon available on the footer at the bottom of each page of the Portal and completing the contact form which is displayed.

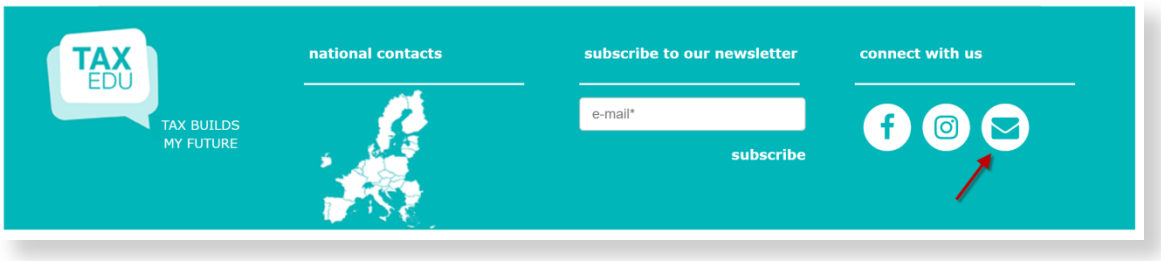


Figure 20 - TaxEdu Portal footer: "mail" icon

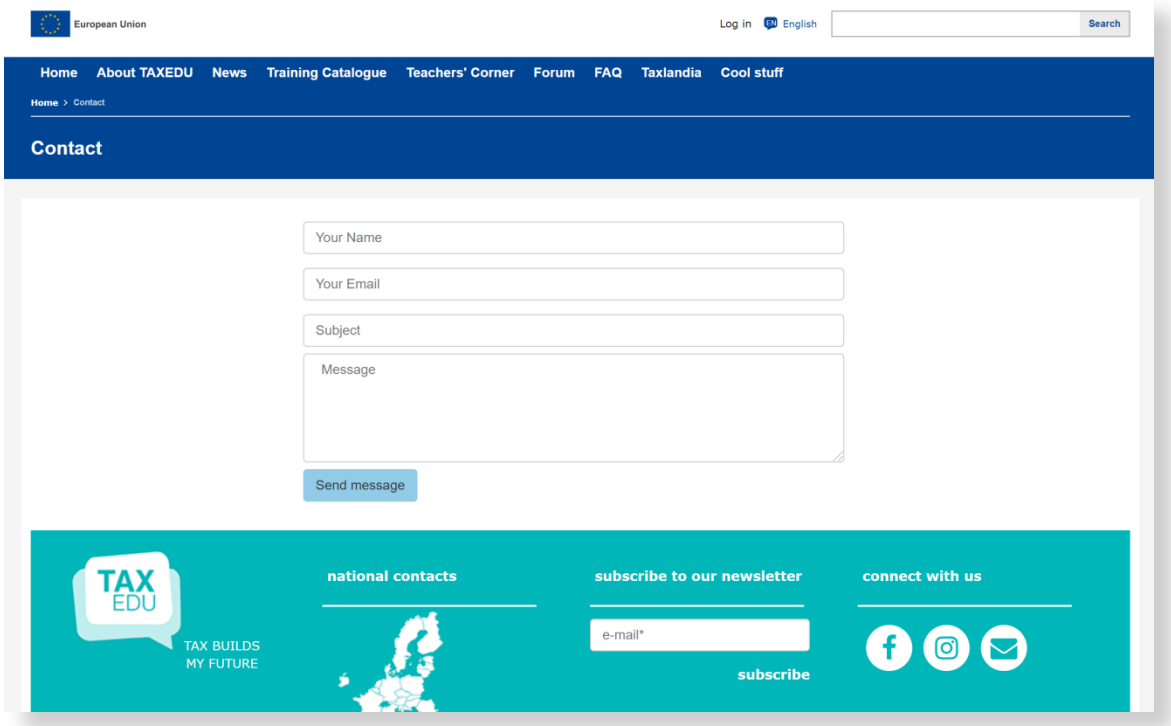


Figure 21 - Contact form

4. Registered users

In order to gain access to more features in **TaxEdu** portal, including permissions to propose or manage content you have to first become a registered user.

4.1 Log in

Step 1: Click on "**Log in**" on the top menu as shown below.

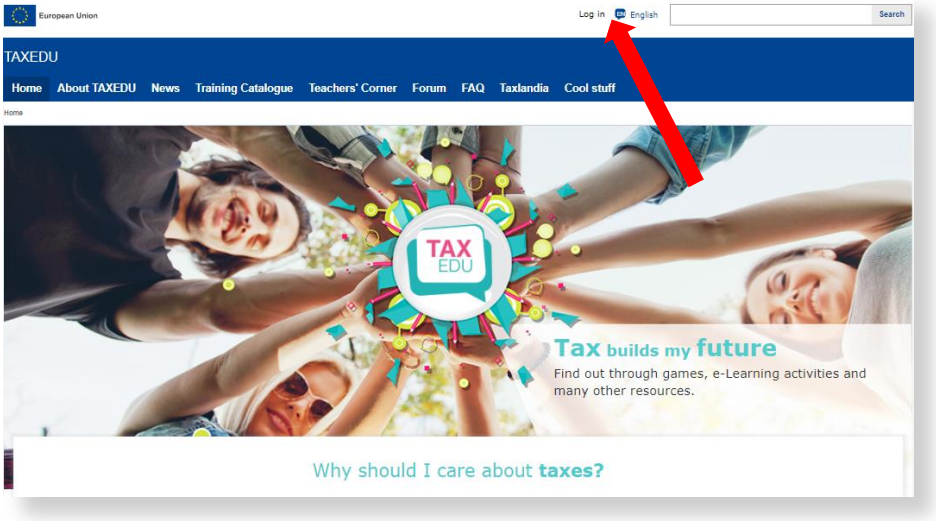


Figure 22 – Log in

If you do not have already an **EU Login** account you will have to first register inside **EU Login**. This is a secure service offered by European Commission for accessing WEB sites provided by the EC.

The **EU Login** window will be displayed on the screen. Click on "**Create an account**" and follow the steps required to register with the **EU Login** service.

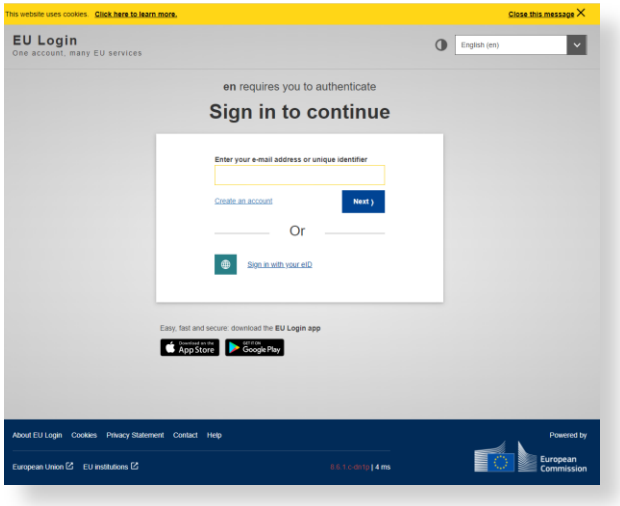


Figure 23 – Sign in EU Login

If you already have an account registered with **EU Login** enter your e-mail address and click on the **Next** button.

Enter your password. If the password is valid you will be directed to **TaxEdu** portal and the "**My account**" page will be displayed:

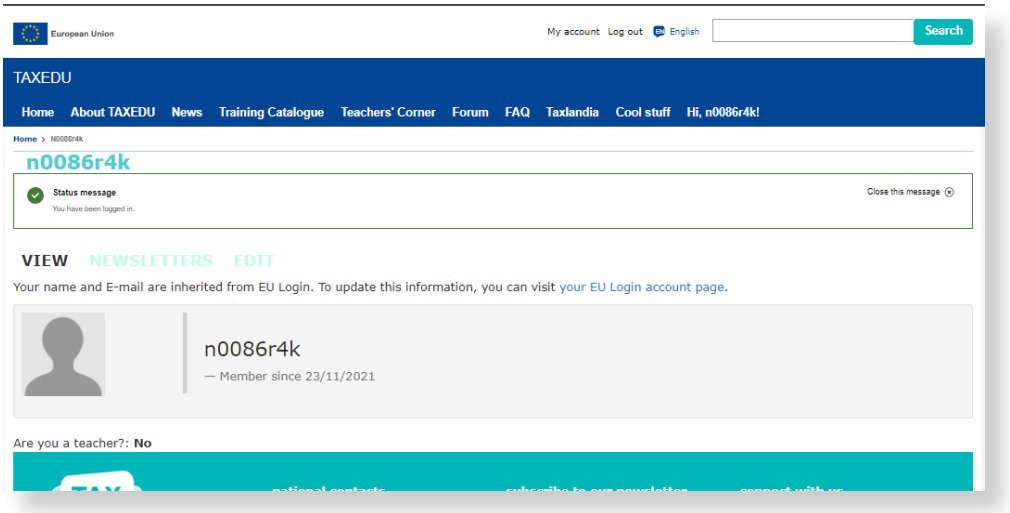
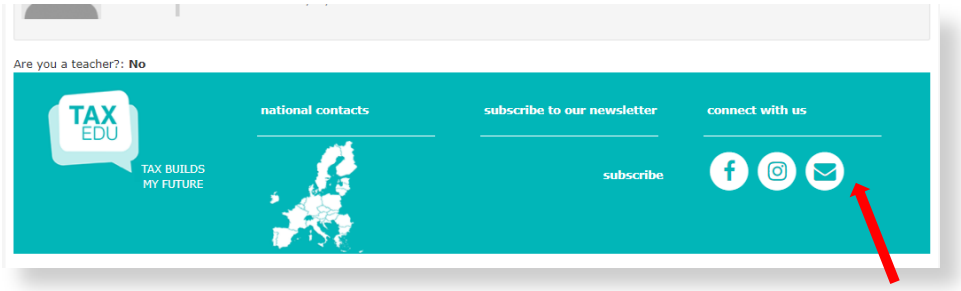


Figure 24 – My account page

4.2 Request a specific user role

In order to obtain permissions in **TaxEdu** portal you have to contact **TaxEdu's HELPDESK** by using the "**connect with us**" section in the page's Footer. Click on the envelope icon shown bellow.



In the **Contac**t form displayed on the screen please formulate your request and provide information on how we can contact you. A member of the HELPDESK will communicate with you and will discuss the role you could receive in **TaxEdu** portal based on your occupation and interests.

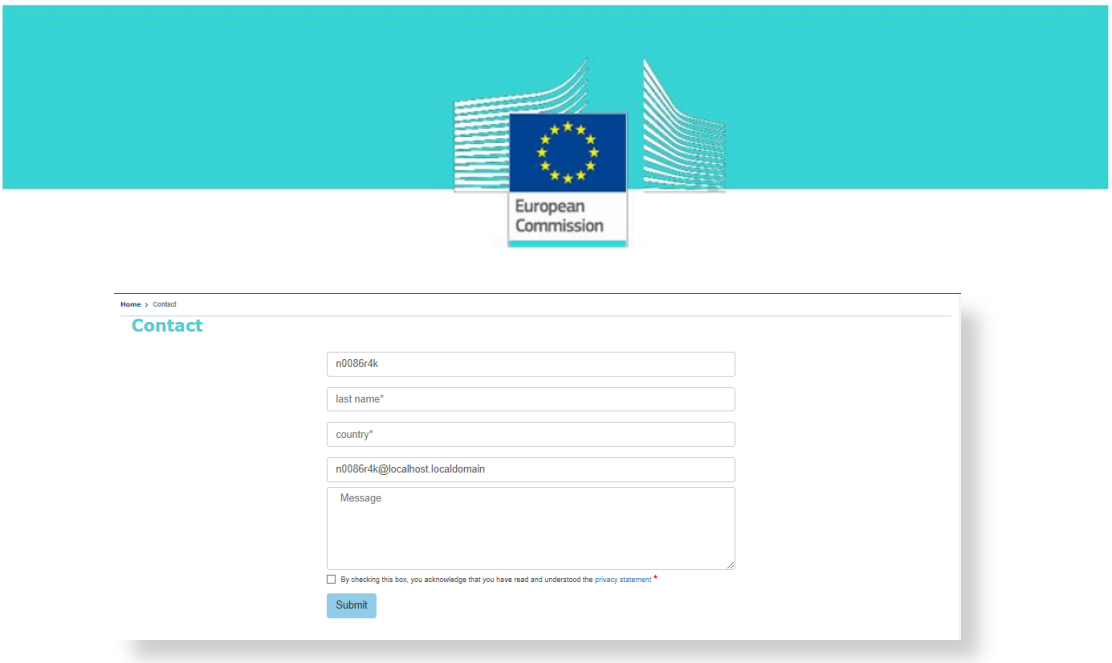


Figure 25 – Contact Form

4.3 The simple user role

Simple user can:

- See all the content of **TaxEdu** Portal
- Access the "**My account**" page
- **Edit** her/his **account**
- **write** comments on the forum
- **report** a resources

4.3.1 Registered user menu

The registered users' menu allows to access specific functionalities. Depending on the role, the menu will display more or less functionalities.

In the figure presented below, the menu shows the functionalities for the simple user. The box highlighted in orange mentions: "Hi, <*user name*>!". In Figure below "Simple user" was used for explanatory reasons.

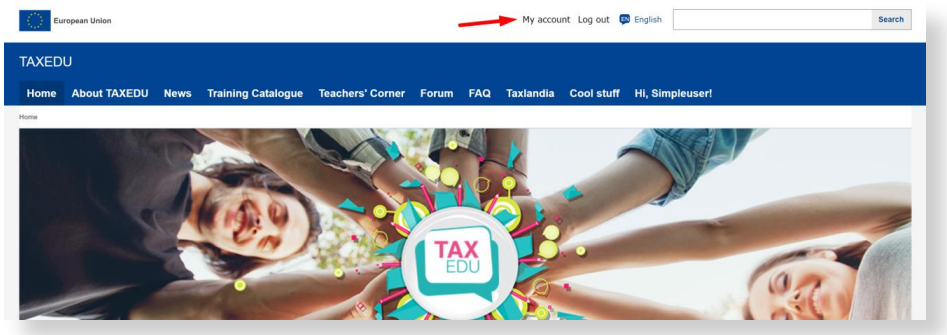


Figure 26 - Simple user's menu

4.3.2 Edit account on “My account” page

When the user accesses “**My account**” menu function, the View tab is displayed.

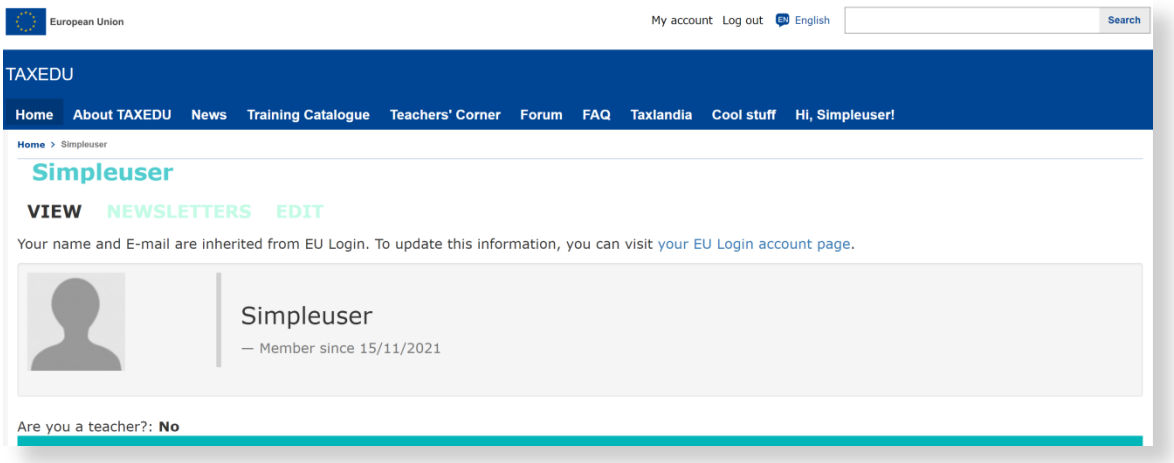


Figure 27 – View tab on “My account” page

The profile can be edited at anytime within the form presented below. The form is displayed when clicking the **Edit** tab. The user can change any information in the fields. Saving changes is done by pressing the “**Save**” button.

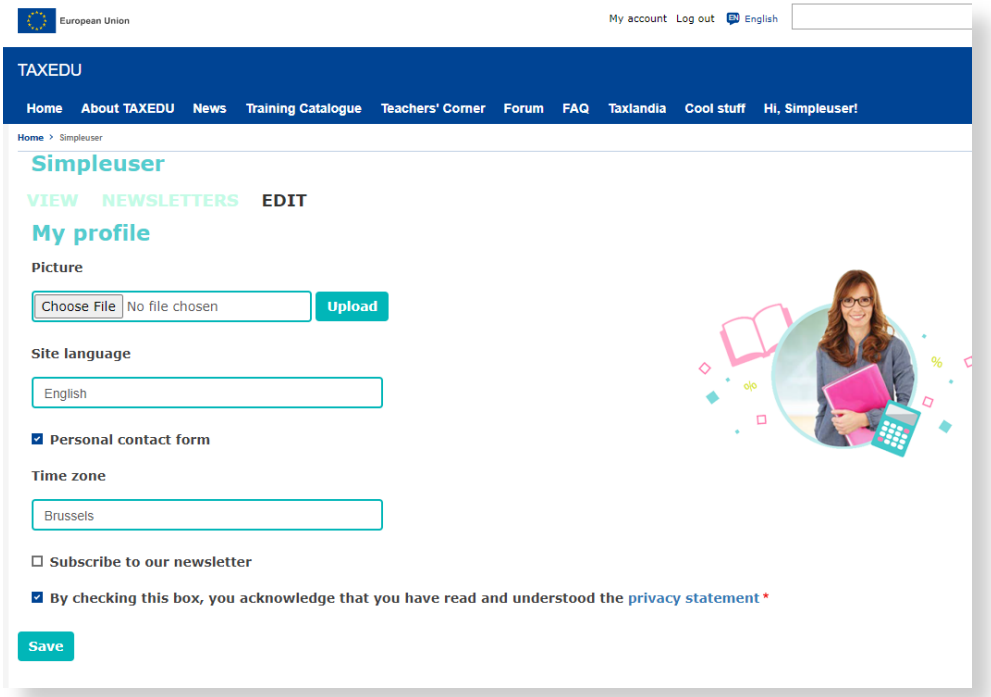


Figure 28 - Edit account (Edit tab on “My profile” from user’s menu)

Also using the **"My account" user's menu function > Newsletter** tab, the user can subscribe to the newsletters. The user has to select the newsletter by checking the check box and then press the "**Save**" button.

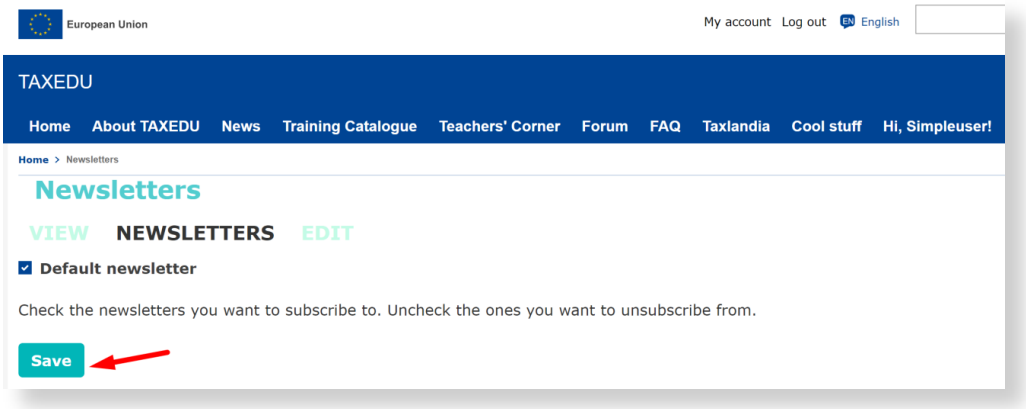


Figure 29 – Newsletter subscriptions (Edit tab on "My account" from user's menu)

4.3.3 Add a new comment on the Forum

Step 1: From the main menu select "**Forum**";

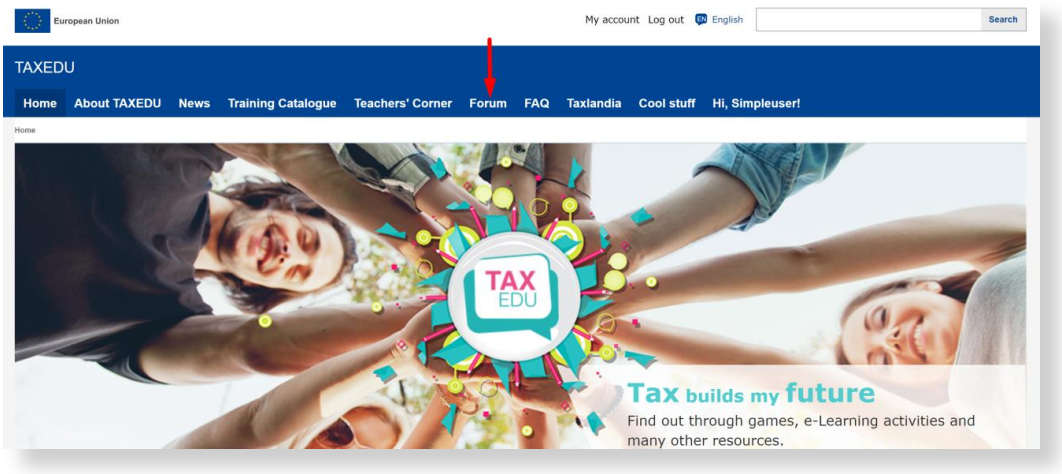


Figure 30 – "Forum" menu's function

Step 2: Select one forum by clicking the name's forum;

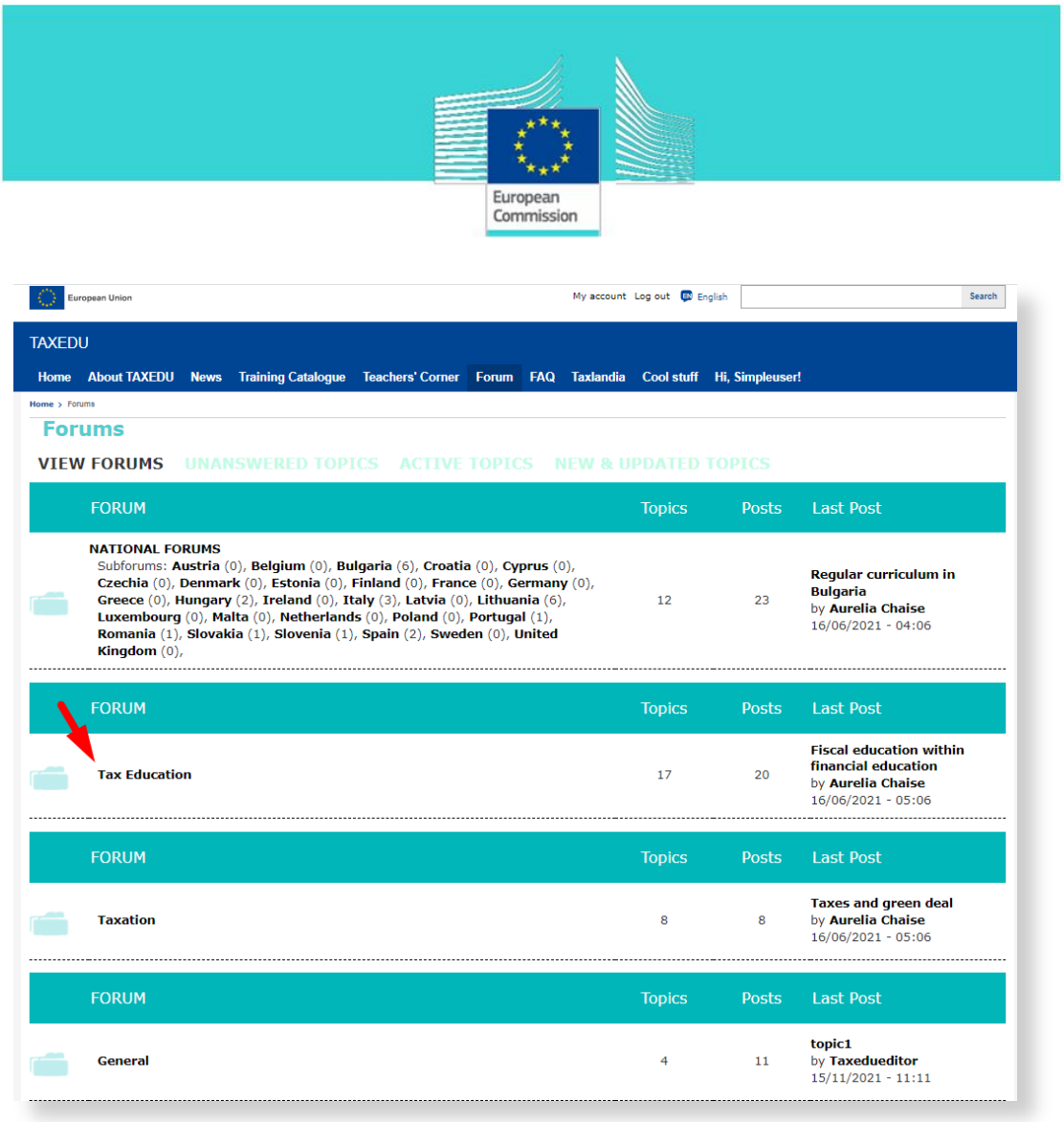


Figure 31 – Select a forum from Forums page

Step 3: Select a topic from that forum by clicking the name's topic;

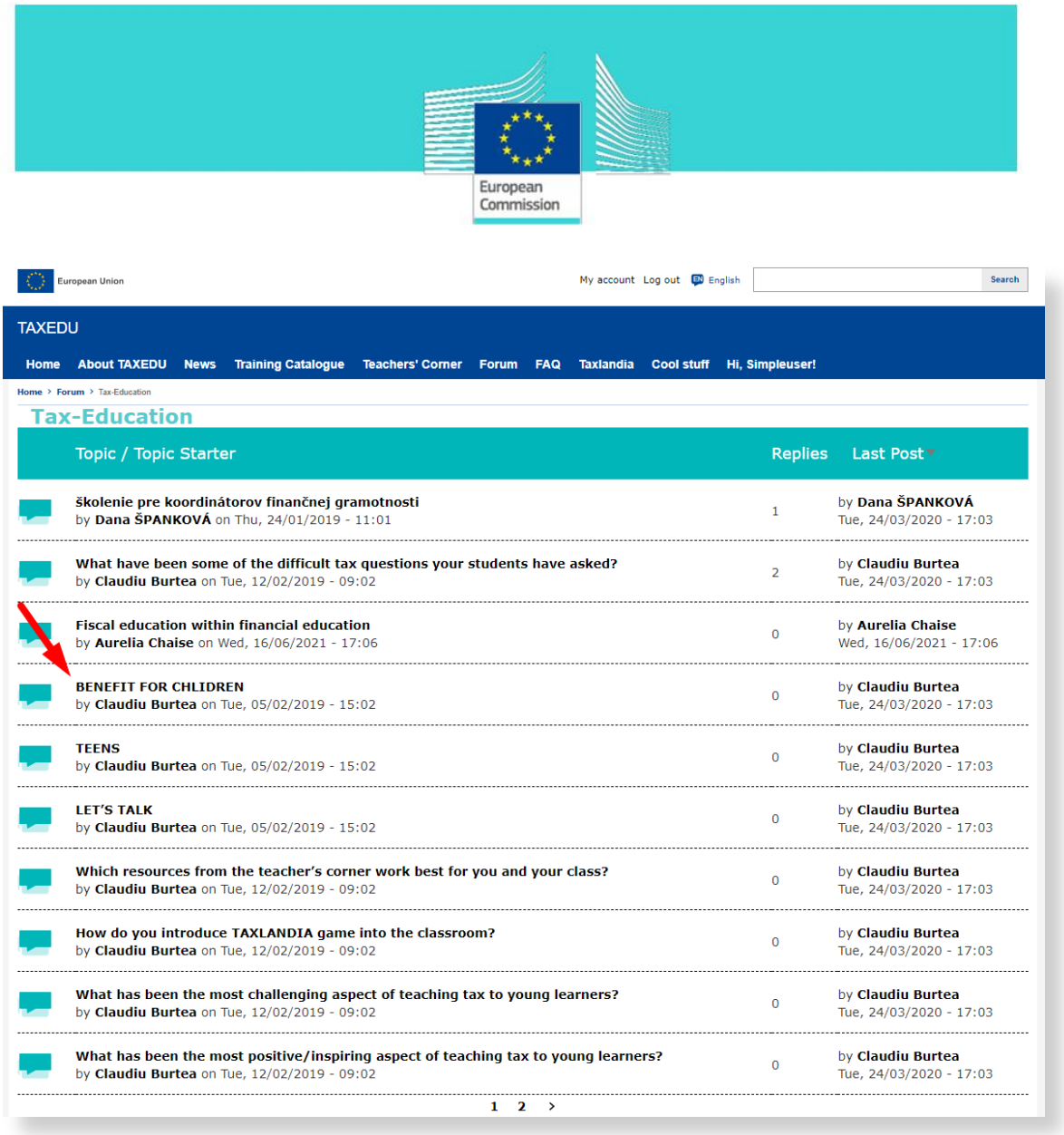


Figure 32 – Select a topic

When the topic is selected, the topic's page is displayed. In this page, the users comments are displayed in order; under each comment there is the "TOP" button (pressing this button the user returns to the top of the page) and the "Reply" button (by pressing this button the user can reply to a specific comment).

Step 4: Press the "**Quick Reply**" button to go directly to the "**Add new comment**" region.

Step 5: Fill in the comment (free text) in the "**Add new comment**" box

Step 6: Post the comment by pressing the "**Save**" button. You can review the comment before posting it by pressing the "**Preview**" button.

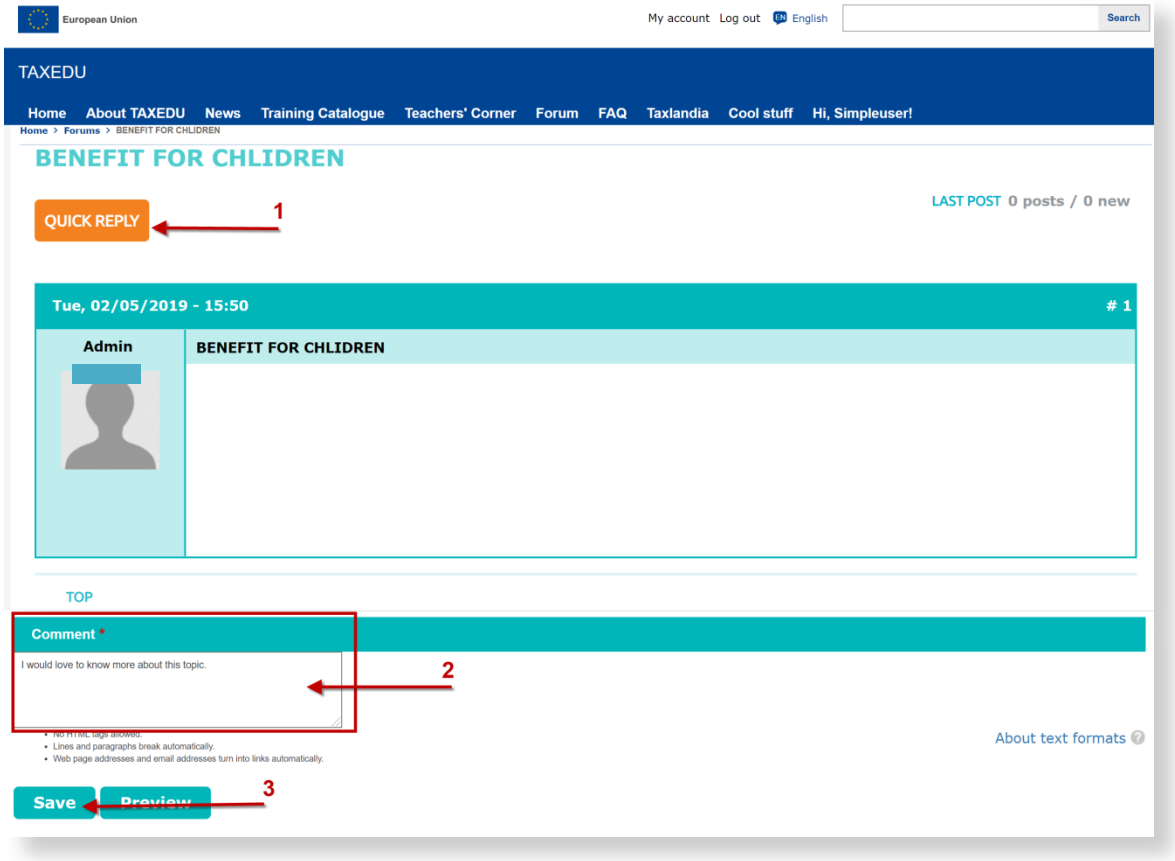


Figure 33 – Add a new comment

Step 7: Close the confirmation message (by pressing the "**Close the message**" button.

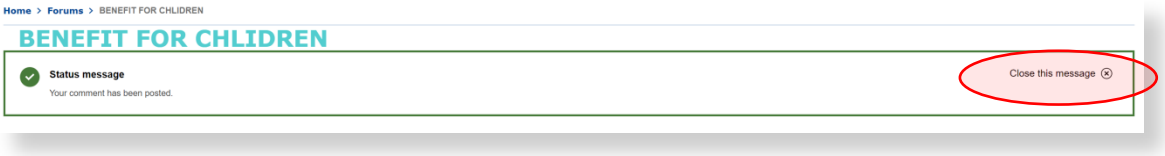


Figure 34 – Confirmation message ("comment has been posted")

Note: A new comment is displayed as shown below, with the following details: creation date and time (1), "parent" (2), the name of the user (3), comment number (4), the "**Top**"* (5), "**Replay**"*** (6), "**Delete**" (7) and "**Edit**"** (8)

Figure 35 – New comment display

*) pressing the "**TOP**" button the user returns to the top of the page.

) pressing the "Edit**" button the user can modify his comment (in the "Edit a comment" form below). The changes are saved and posted by pressing the "Save" button.

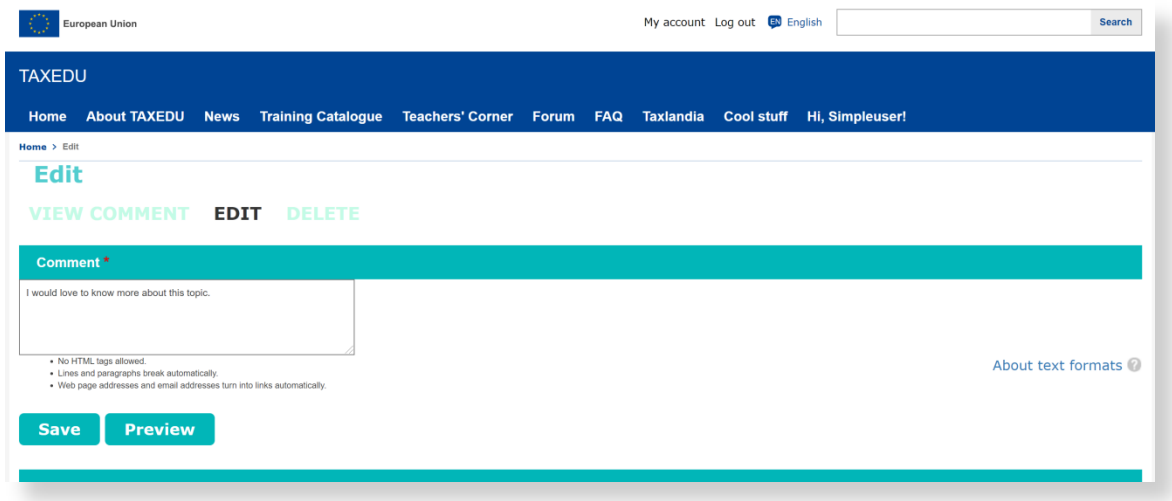


Figure 36 – Edit a posted comment

***) pressing the "**Replay**" button a user can add his comment to an existing comment (in the "Add new comment" form below). The "Add new comment" form displays the comment that is replayed and a "Comment" box, in which the user fill in the message (free text). The comment is posted by pressing the "Save" button.

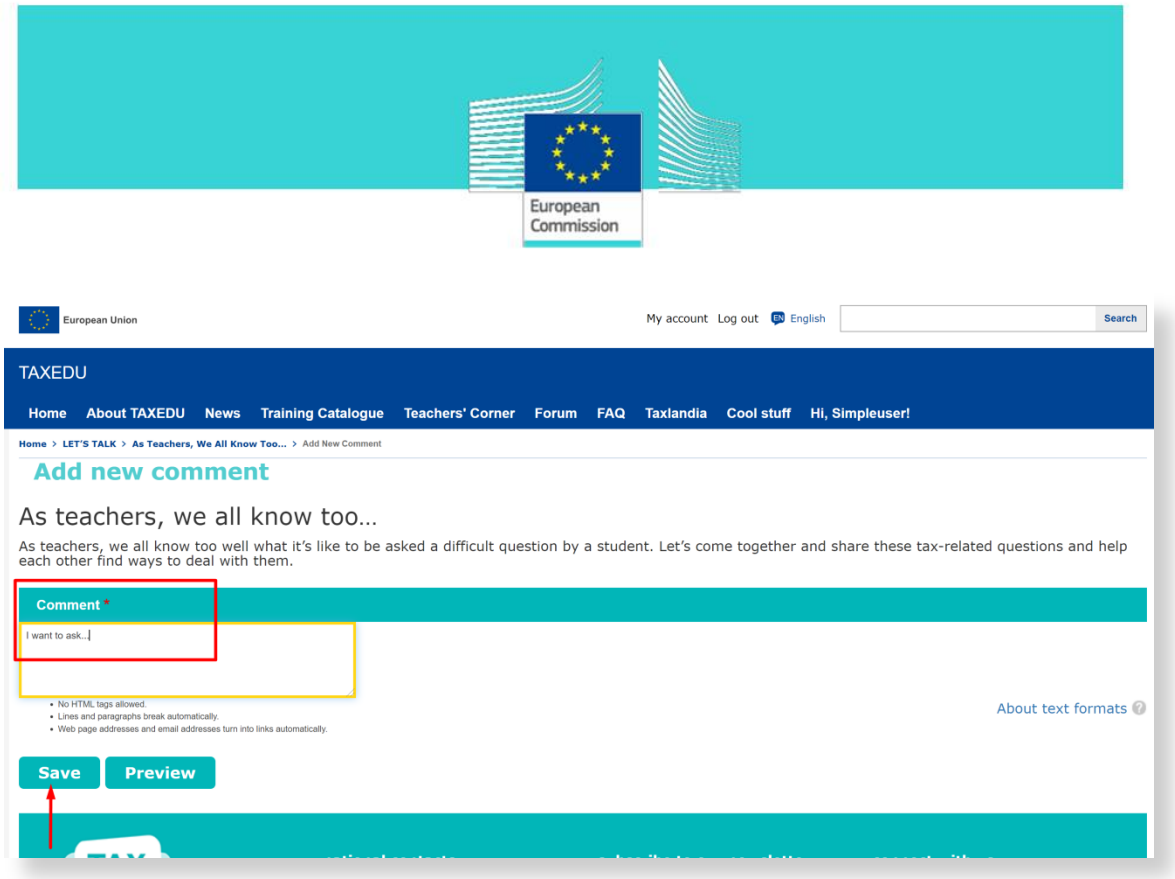


Figure 37 – Add a replay to a comment

4.3.4 "Training Catalogue" page overview

"**Training Catalogue**" page is available to all registered users and visitors. The page display is the same for all users, but certain functionalities are available only for users which have been assigned the **Teacher, TaxEdu Editor** or **Webmaster** role.

In order to access the "**Training Catalogue**" page, the user has to select "**Training Catalogue**" from the main menu:

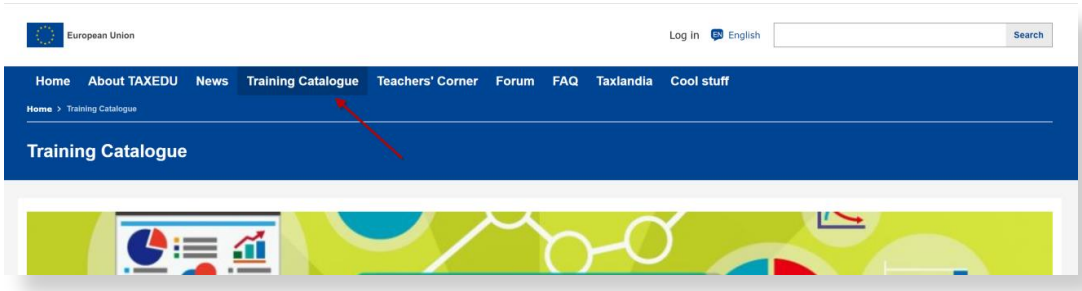


Figure 38 – "Training Catalogue" on main menu

The "**Training Catalogue**" page is displayed:

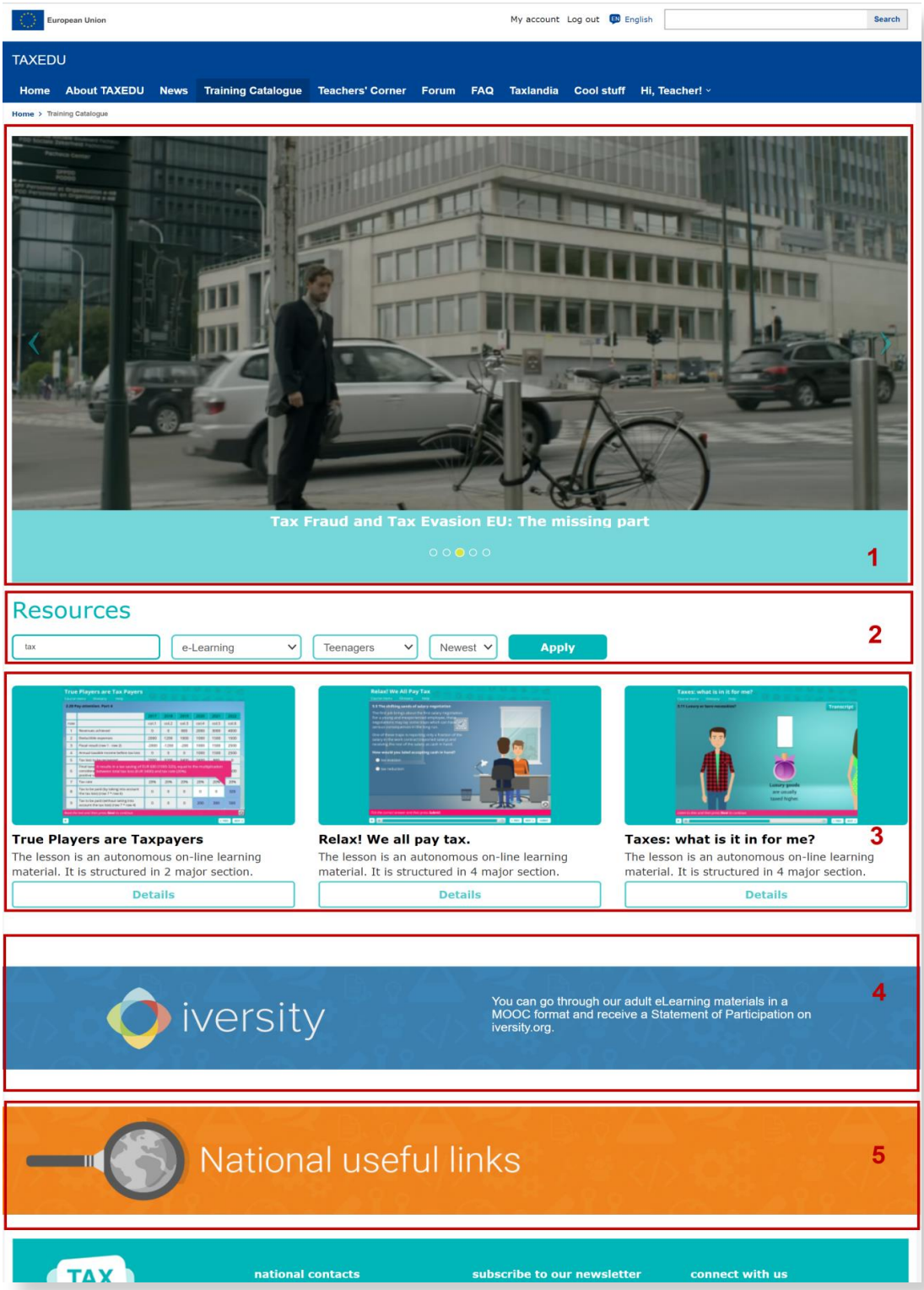


Figure 39 – "Training Catalogue" page

The highlighted regions displayed in "Training Catalogue" page are:

- **Region 1: the "Carousel"** that displays the last five uploaded resources (the newest):

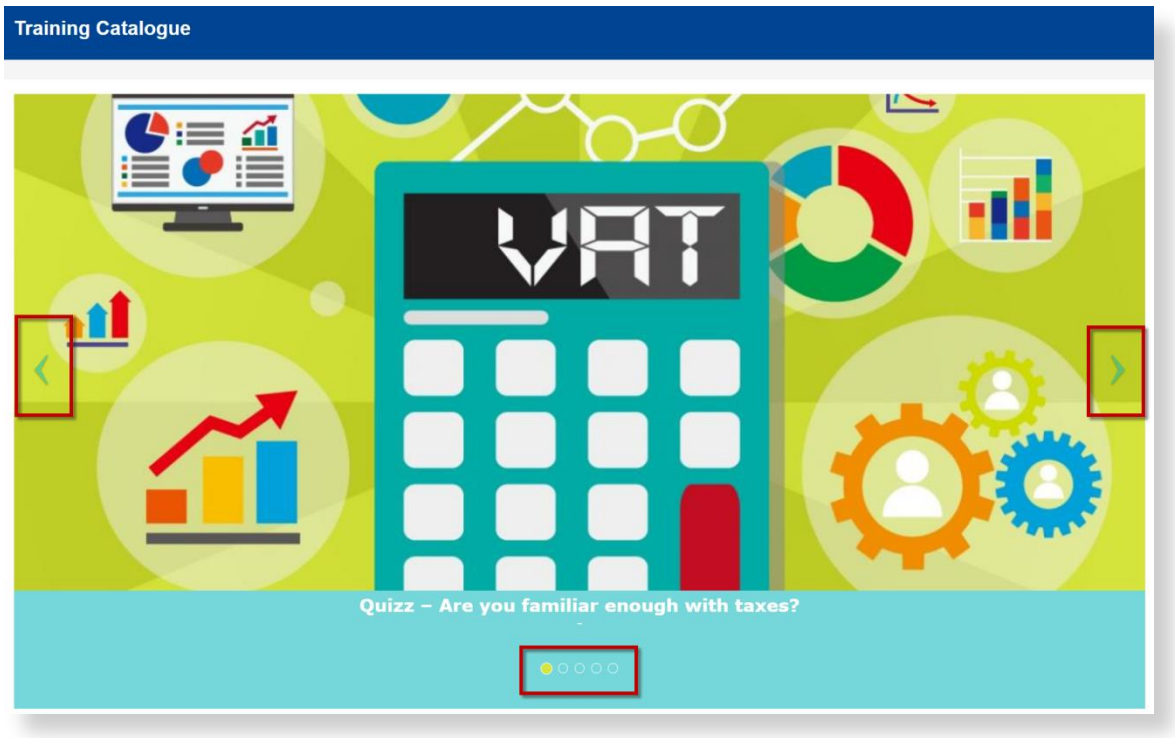


Figure 40 – The newest resources' "Carousel" on Training Catalogue page

- **Region 2: Search** (filter) region:

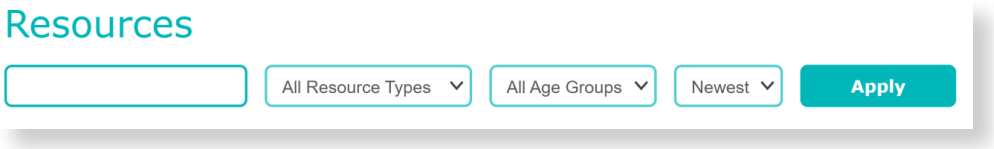


Figure 41 – "Search" region on Training Catalogue page

In order to filter the resources displayed on region 3, the user can fill in one or more fields in the search (filter) region.

You can fill in a resource name or a word from the resource's name:

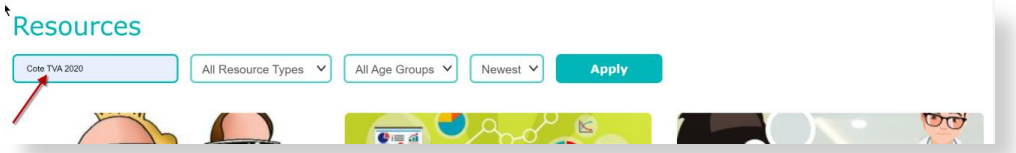


Figure 42 – Search by resource name field on Training Catalogue page

The user can choose an age group from the list (by default all age groups are displayed)

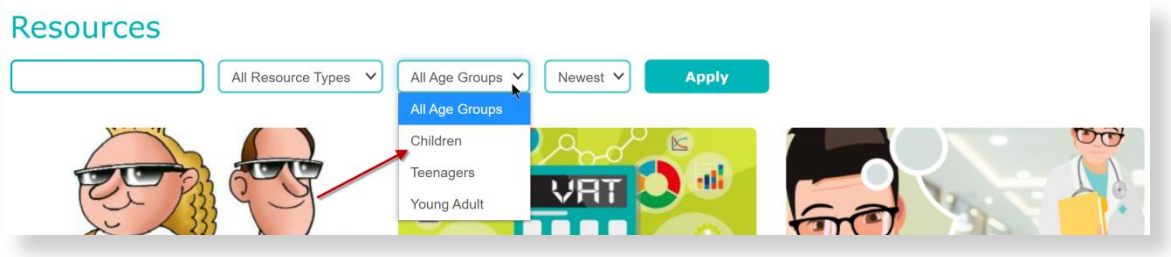


Figure 43 – Select an age group on Training Catalogue page

The user can choose a resource type from the list (by default all resource types are displayed)

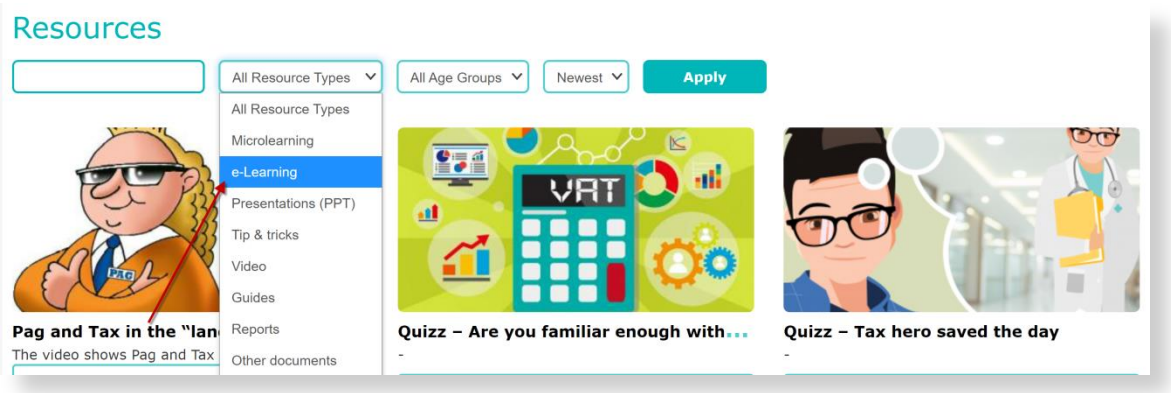


Figure 44 – Select a resource type on Training Catalogue page

The user can choose to display the oldest or the newest content first (by default the newest resources are displayed first)

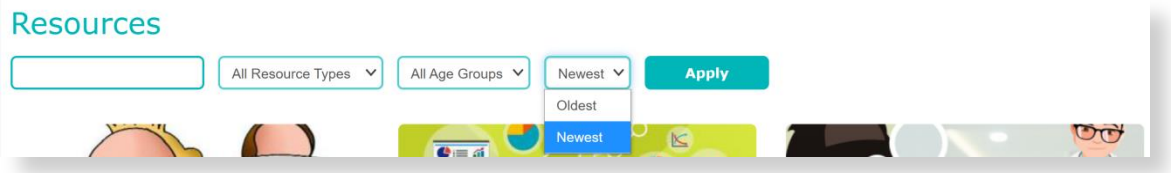


Figure 45 – Newest/Oldest list on Training Catalogue page

Pushing the "**Apply**" button will execute the filter. Resources will be displayed (in region 3) according to the criteria selected in the filters.

- **Region 3:** is the main region on the "**Training Catalogue**" where the resources are displayed. For each resource there is a cover image, a title (in bold), a short description and a "**Details**" button.

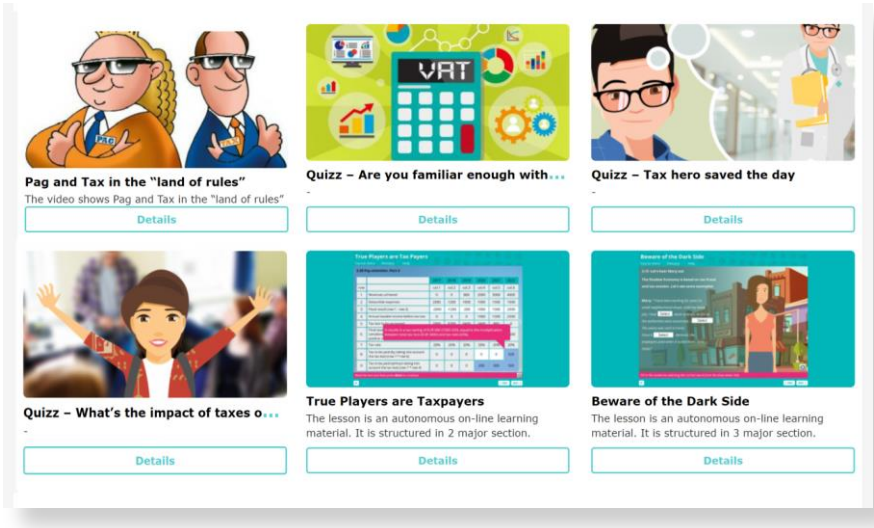


Figure 46 – Resources region

- **Region 4: "iversity"** button, which leads the user to the "iversity" page (https://iversity.org/en/courses/taxes-in-our-life).

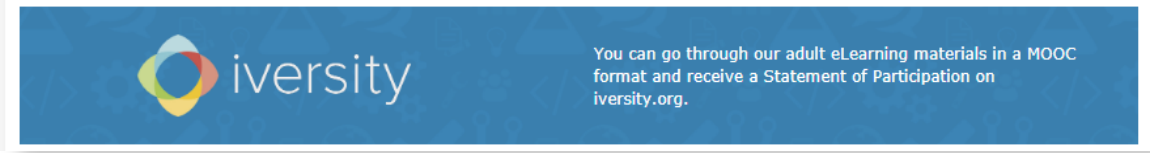


Figure 47 - "iversity" button

Figure 48 - "iversity" page

- **Region 5**: named "**National Useful links**" points to a list of links to additional materials produced at national level.

Figure 49 - "National useful links" section

4.3.5 Report an article from "Training Catalogue" section

This functionality allows the user to report inappropriate materials in the "**Training Catalogue**" section or to make suggestions to the administrators of **TaxEdu Portal**.

Step 1: From the main menu select "**Training Catalogue**";

Step 2: Select the resource you want to report;

Step 3: Scroll down and press "**Report this resource**" button;

Step 4: Enter your name and email;

Step 5: Write the subject and the message;

Step 6: Press the button "**Report this resource**".

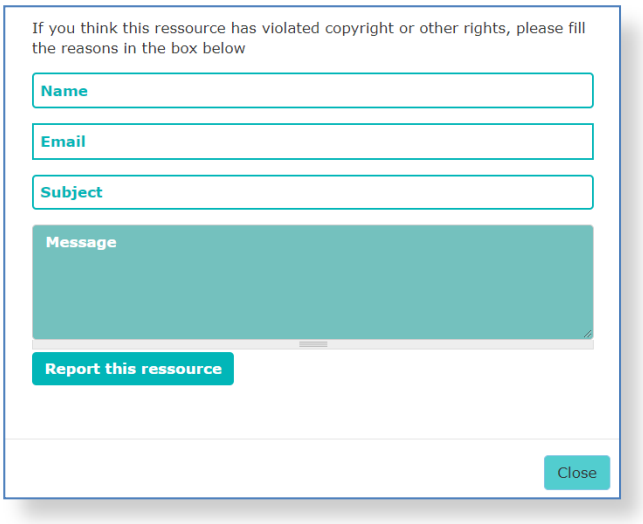


Figure 50 - Resource reporting form

4.3.6 "Log out"

To disconnect from **TaxEdu Portal**, you have to click on "**log out**" as shown below.

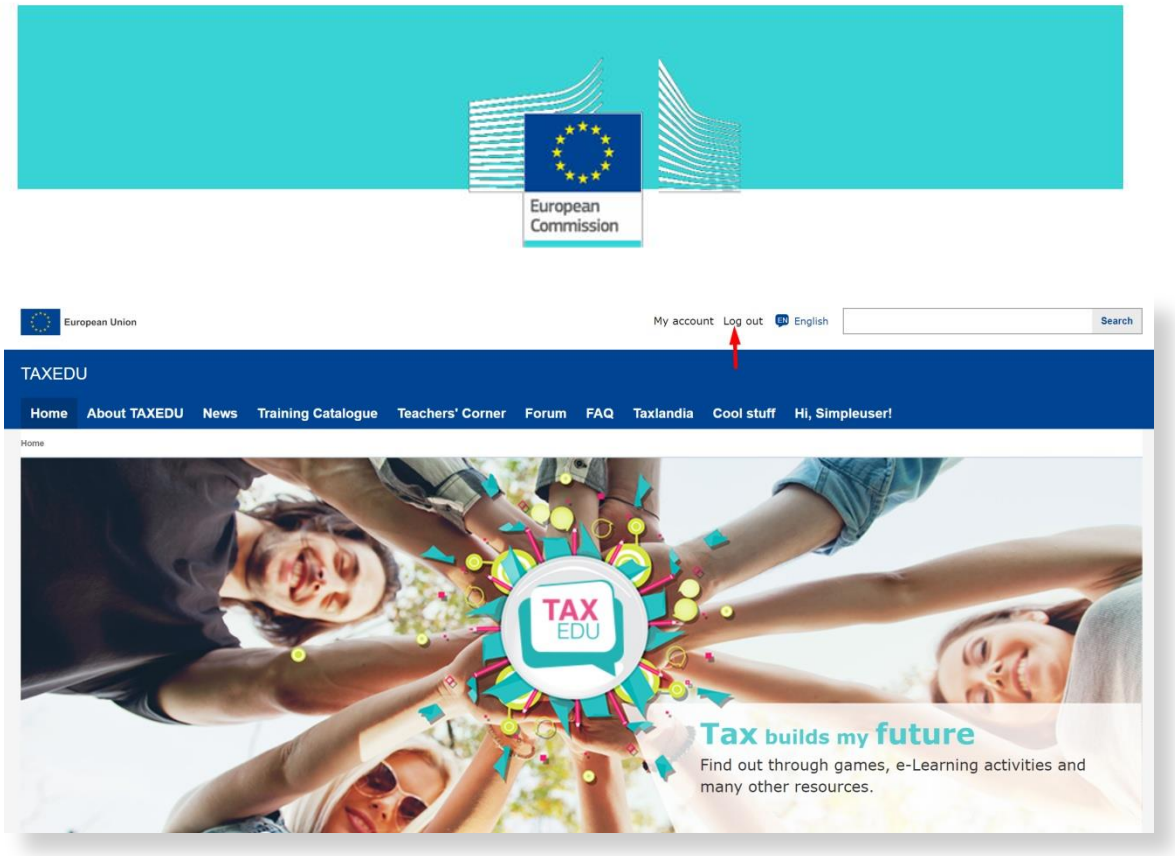


Figure 51 – "log out" menu item

4.4 The teacher role

The teacher user can:

- Perform the same activities as the simple user.
- **Propose, Edit, Modify** content through the **"My resources"** function
- **Upload** content in "**Training Catalogue**" and "**Teachers' corner**" sections through a specific upload form. Content proposed by the teachers will be posted on **TaxEdu** Portal only after the review and approval of a **TaxEdu Editor** or a **webmaster** user.

4.4.1 "Register" or "log in" as a teacher

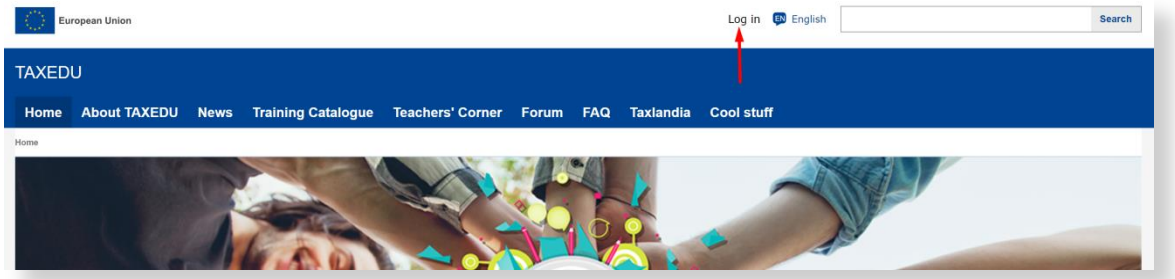


Figure 52 – Log in as a Teacher

If you already have a teacher account, push the "**log in**" menu item and you will be logged in as a teacher user.

After login you will see, in the right side, the welcome message: **Hi, "*user name*"!** In the figure below it reads "Teacher" for explanatory reasons. (we used this user name).

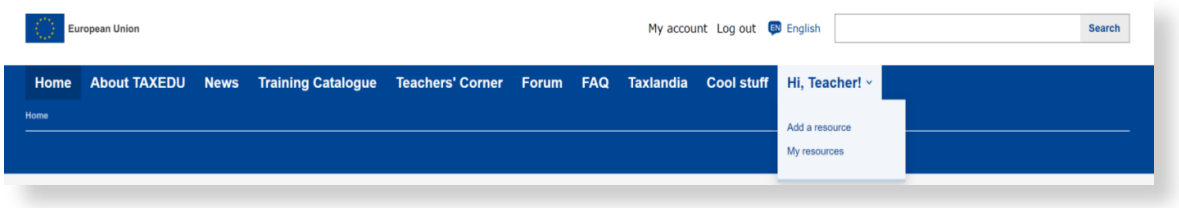


Figure 53 – Teachers' menu

4.4.2 Teachers' menu

To manage the content (Upload, Edit or Modify) the **Teacher** has to use the "**My resources**" menu item. It allows the **Teacher** to upload content and request publication of the content in "**Training Catalogue**" or/and "**Teacher's corner**".

As mentioned above the **Teacher** can propose content that a **TaxEdu Editor** can publish on the "**Training Catalogue**" and/or "**Teacher's corner**" sections. Even if **TaxEdu Editor** does not approve the publication of the content uploaded, the proposed resources are saved in the "**My resources**" section, where they can be viewed by the teacher who loaded them.

4.4.3 Post content in "My resources" section

The function "**My resources**" is available for the registered users that have been assigned the **Teacher** role or **TaxEdu Editor** role. "**My Resources**" menu item is not available for the simple user.

Step 1: Select "**My resources**" and the following page is displayed:

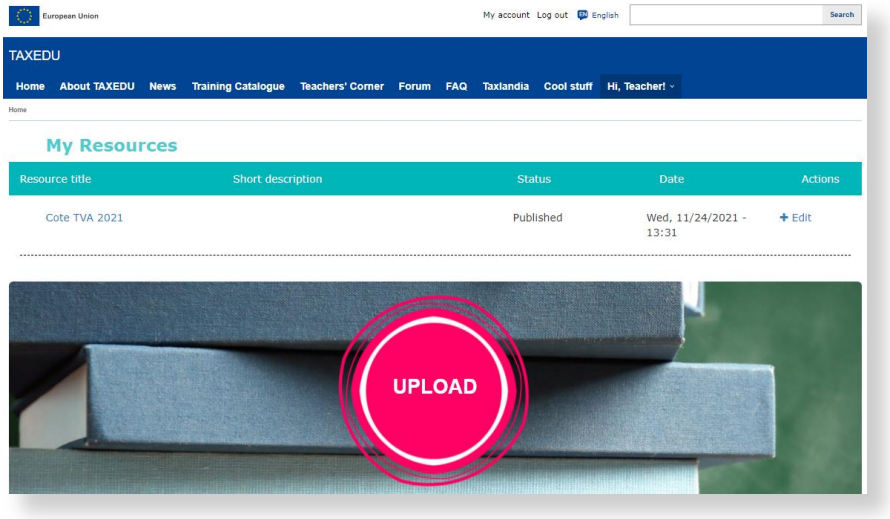


Figure 54 - My resources page

Step 2: Click the **UPLOAD** button. The "**Upload Resource**" form is displayed:

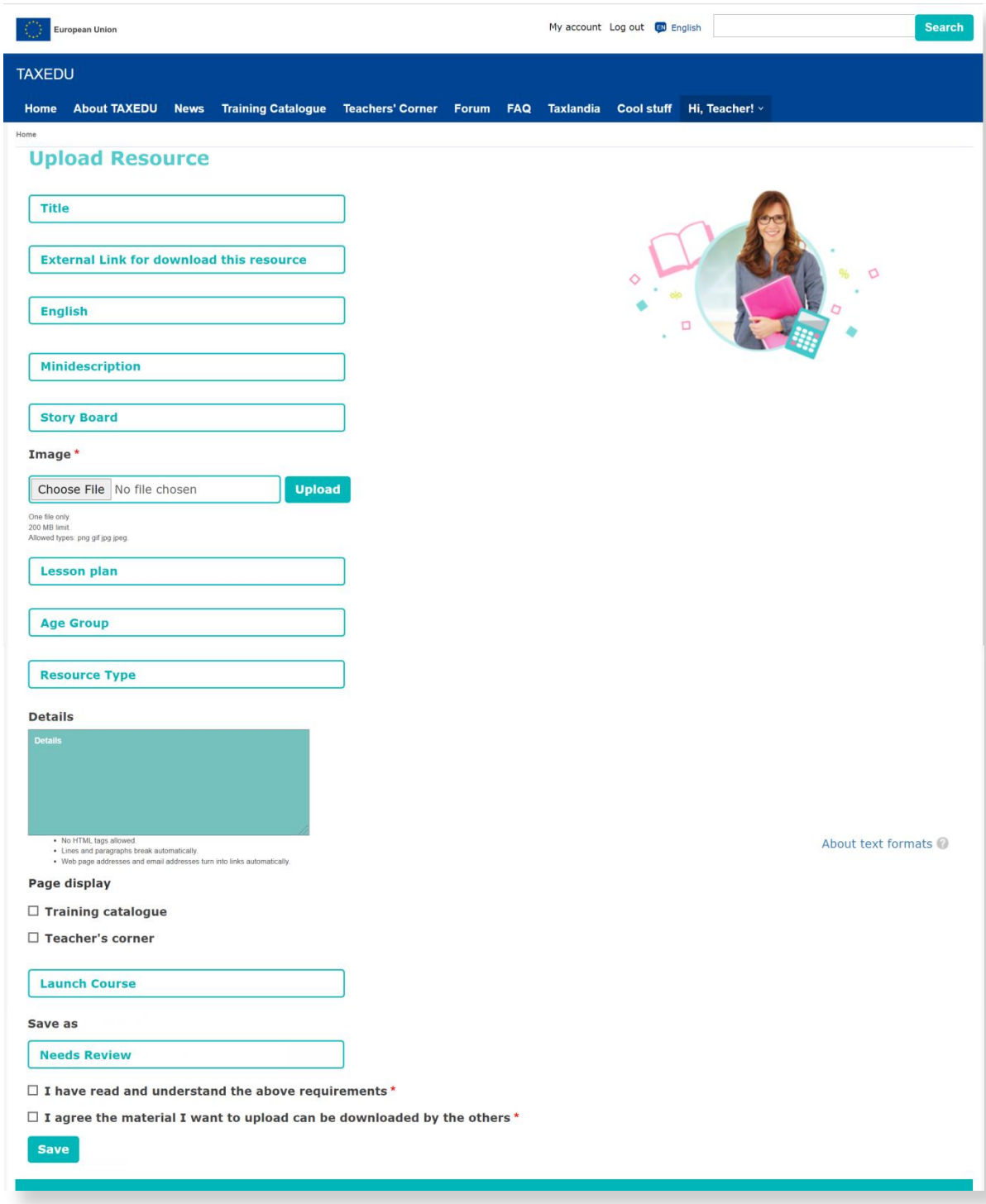
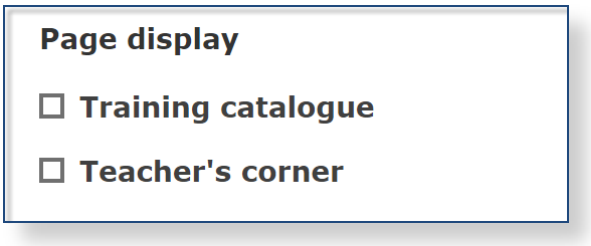


Figure 55 - Upload Resource form

Step 3: In the **Upload Resource** form, the user has to fill-in the displayed fields*. The user can select where he wants the uploaded content to be published. The options are: on the "Training Catalogue" or/and "Teacher's corner".



Step 4: Click the **Save** button.

Note: After saving, the resource is uploaded internally into "**My resources**" but it is not visible on **TaxEdu Portal**. In order to become visible on the portal, the proposed content must be approved by a **TaxeEdu Editor** who will post it on the "Training Catalogue" or/and "Teacher's corner" pages. Until this approval, the uploaded resource will be shown as draft in "**My resources**" page, not being public. In case the proposed material is considered not appropriate or incomplete for any reason, the national contact in charge of the approval will get in touch via a private message with the author of the proposed content.

4.4.4 Edit, Delete proposed content in "My resources" section

Step 1: To edit/delete proposed content added by teachers select Log in or Register to access "My resources" section.

Step 2: Select a resource from "My resources" list.

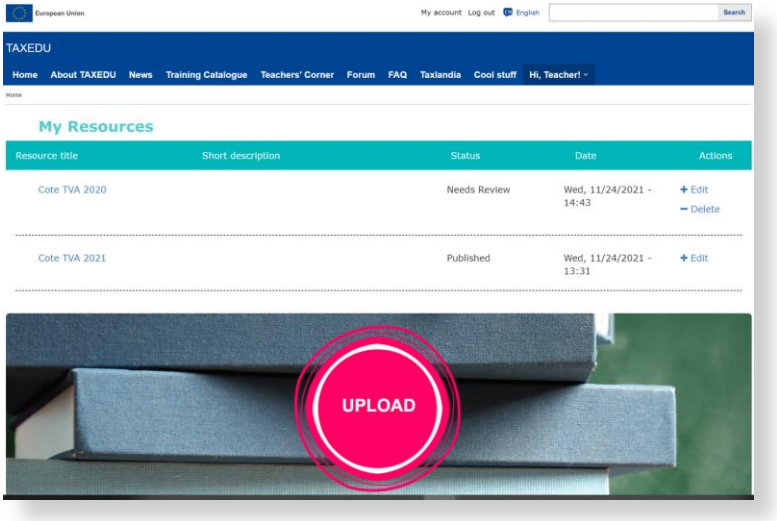


Figure 56 - My resources list

Step 3: Select "**Edit**" from the Actions.

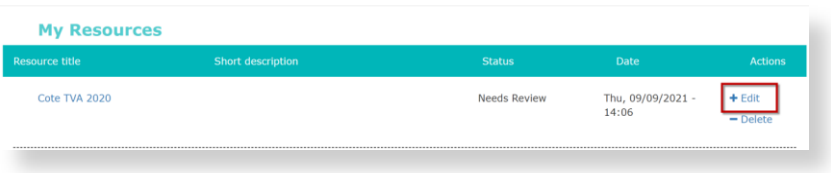


Figure 57 - My resources - Edit draft

Step 4: In the opened form text fields and images can be edited.

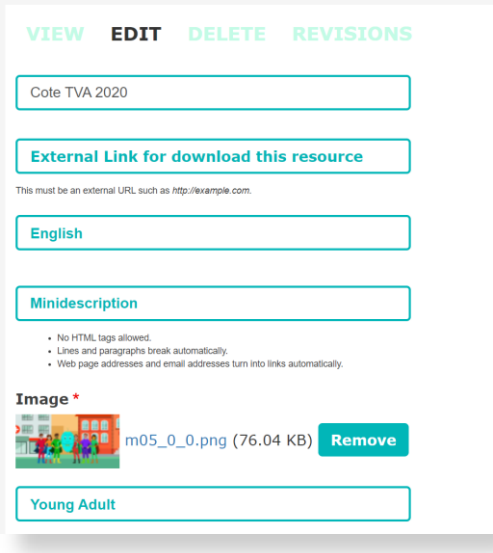


Figure 58 - My resources – edit text and image

Step 5: Press **Save** to modify the resource, or **Delete** to remove it.

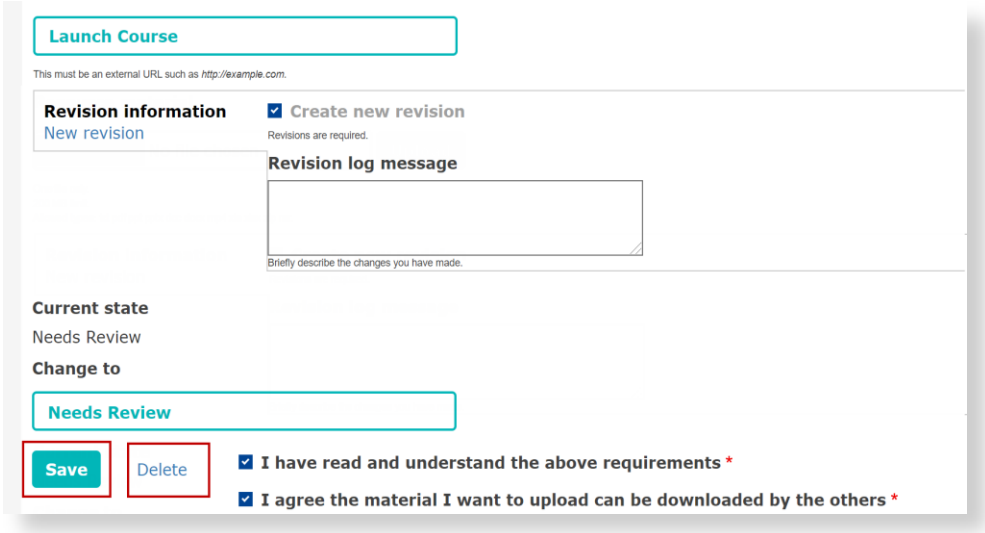


Figure 59 - My resources – Save or Delete

4.4.5 "Teachers' corner" page overview

The purpose of this page is to facilitate user access to functionalities for teachers, trainers or experts in the field of taxation. Some of these features are accessible to registered users with the role of **Teacher**, **TaxEdu Editor** or **Webmaster.**

In order to access the "**Teachers' corner**" page, the registered user has to select "**Teachers' Corner**" from the main menu:

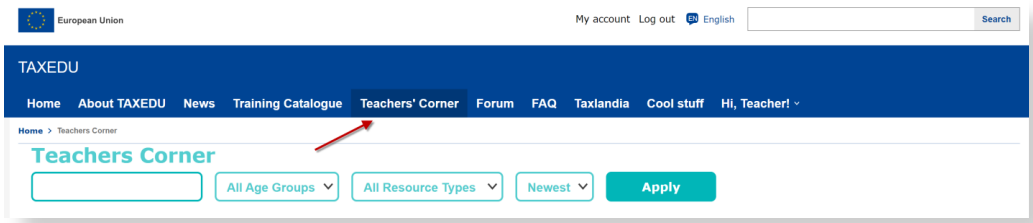


Figure 60 – "Teachers' corner" on the main menu

"**Teachers' corner**" page is displayed:

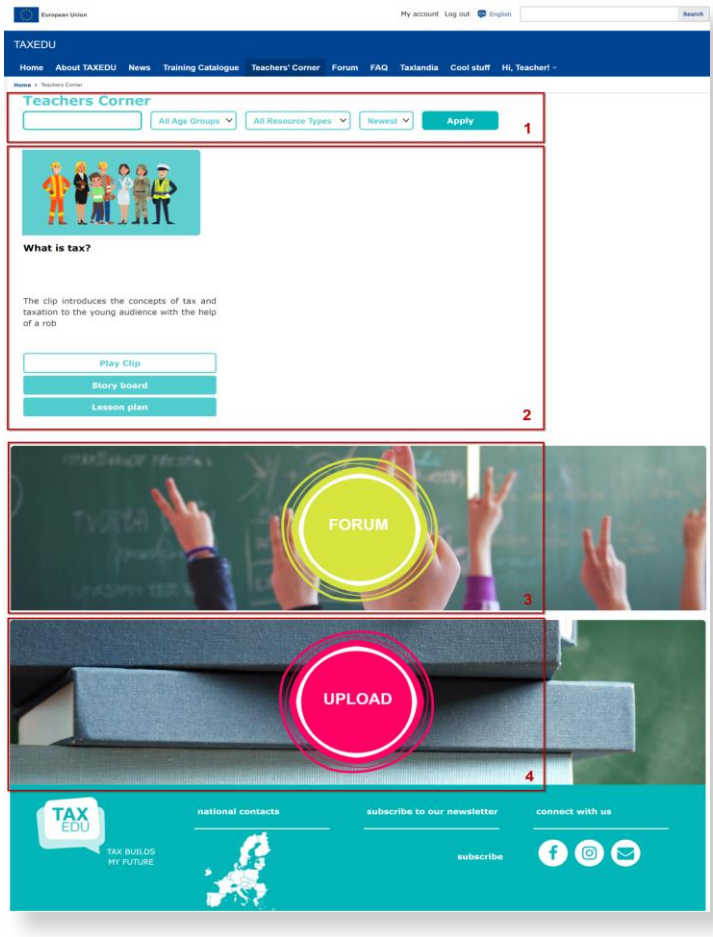


Figure 61 – "Teachers' corner" page

- **Region 1: Search** region:

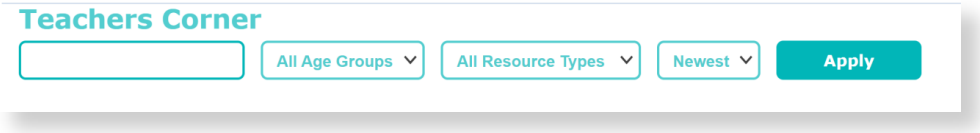


Figure 62 – "Search" region on Teachers' corner page

In order to select (filter) the resources displayed on region 2, the user can fill in one or more fields in the search region.

The user can fill in a resource name or a word from the resource's name:

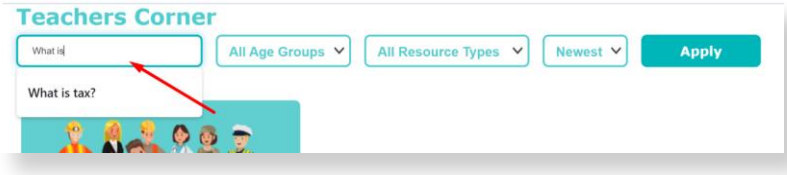


Figure 63 – Search by resource name field on Teachers' corner page

The user can choose an age group from the list (by default the resources for all age groups are diplayed):

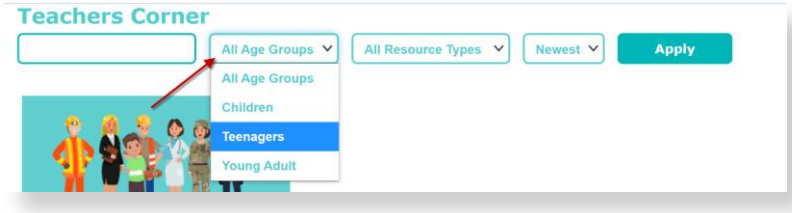


Figure 64 – Select an age group on Teachers' corner page

The user can choose a resource type from the list (by default, the resources for all types are displayed):

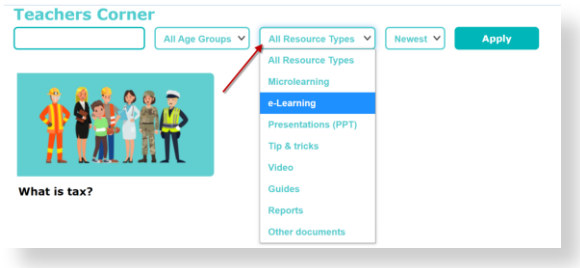


Figure 65 – Select a resource type on Teachers' corner page

The user can choose to display the oldest or the newest content first (by default, the newest resources are displayed first):

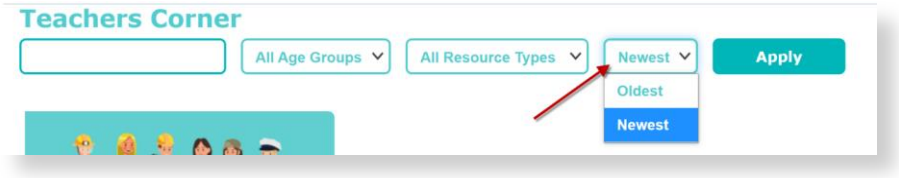


Figure 66 – Newest/Oldest list on Teachers' corner page

By pushing **Apply** the resources will be displayed (in region 2) according to the selected filtration criteria.

- **Region 2:** is the main region on "Teachers' corner", where the published content is displayed.

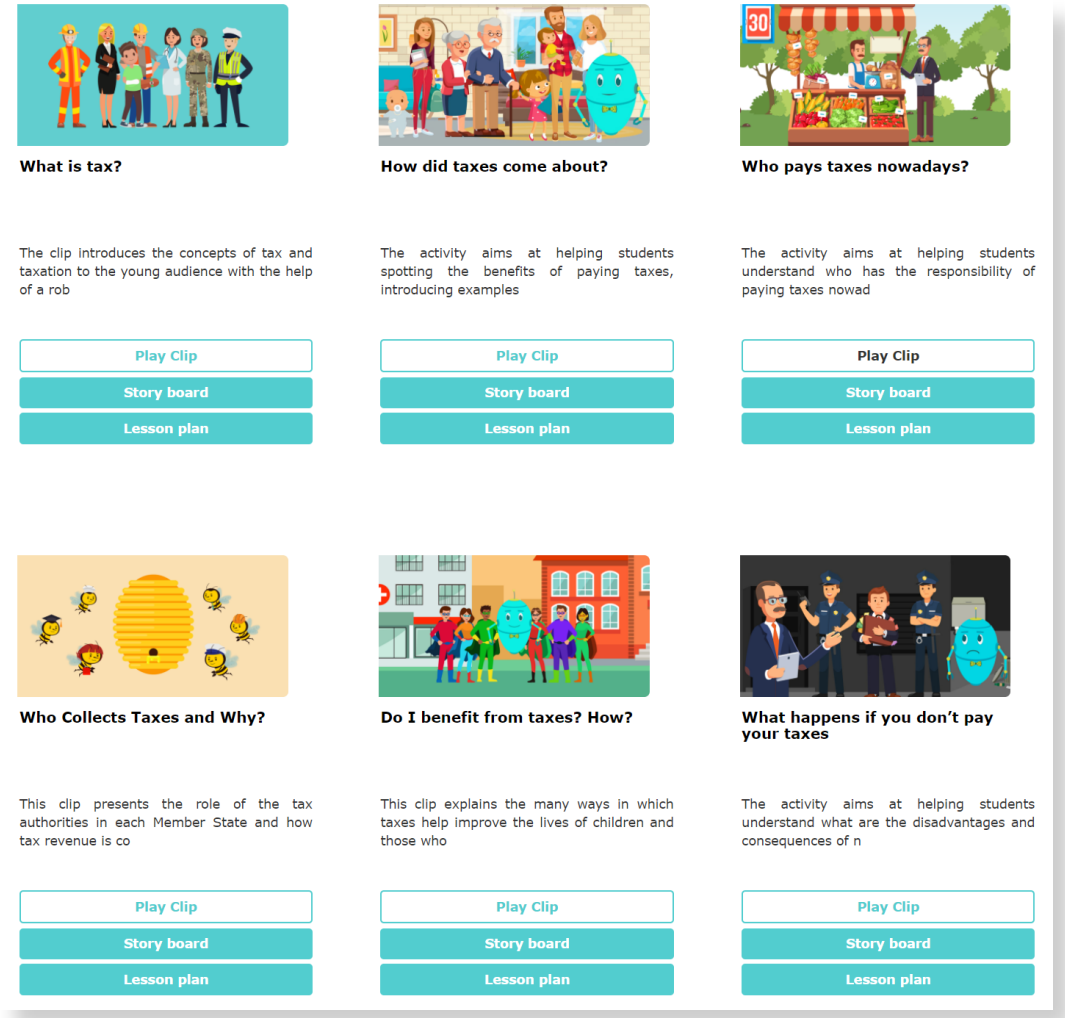


Figure 67 – Published content region on Teachers' corner

- **Region 3: "Forum"** button links to "Forum" page

Figure 68 – "Forum" button

- **Region 4: "Upload"** button, that is displayed for all users including visitors but not enabled for registered simple users and visitors. The **UPLOAD** button is enabled only for **Teachers, TaxEdu Editors** and **Webmasters**. By pressing this button the **Upload Resource** form opens.

Figure 69 - "Upload" button

4.4.6 Upload content in "Teachers' corner" section

This functionality is available only for the registered users that have been assigned the **Teacher TaxEdu Editor or Webmaster**. You have to be logged into **TaxEdu** Portal to **UPLOAD** a resource.

Step 1: Select "**Teachers' corner**" from the main menu. "**Teachers' corner**" page is displayed.

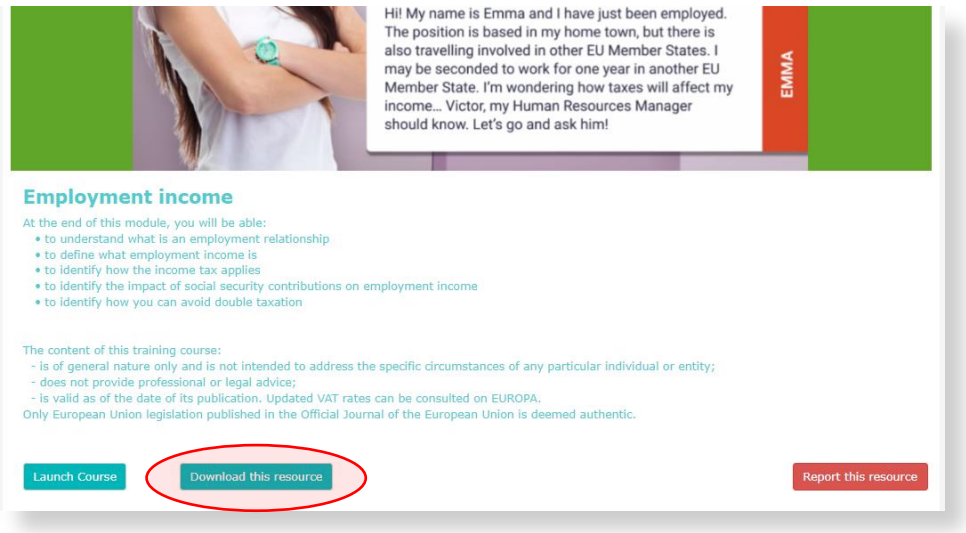
Step 2: Click the **UPLOAD** button;

Step 3: The **Upload Resource** form (is the same form as one that opens from "**My Resources**" pages, see **Figure 55 - Upload Resource form**) you have to fill in the fields as follows:

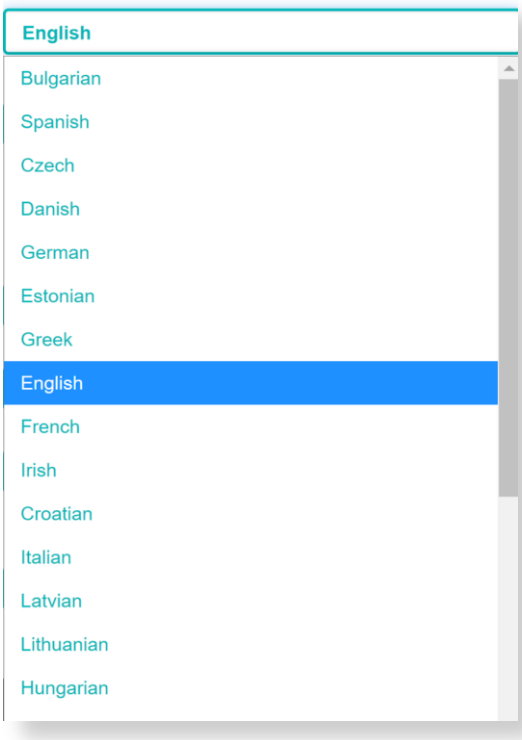
a. **Title** –Resource's title (free text)

b. **External Link for download this resource**

You have to put here a link to the place where is stored a package that contains the resource and that you can download on a computer when the button **Download this resource** on the resource's details page is clicked.



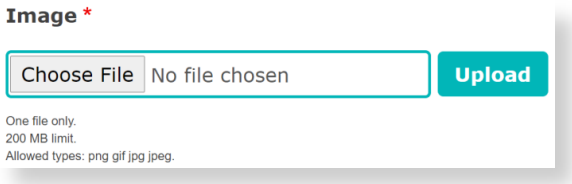
c. **Language** – select the language for your resource



d. **Mini description** – write a short description for your resource (free text)

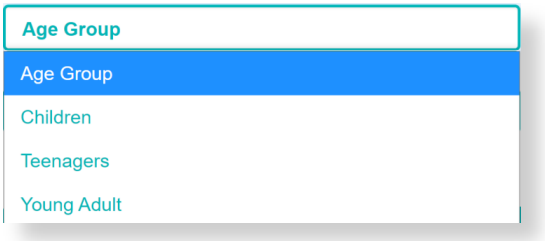
e. **Story Board** - Put here the link to the place where the storyboard is stored. This will allow a user to download the **Story Board** of the resource when pushing the button **Story board** in the **Teachers' Corner** page.(see the **Figure 70 - Content display in "Training catalogue" section**)

f. **Image** – Choose/ Upload a cover image to upload on server. The type file has to be jpeg, png, gif, jpg, and the max size has to be 200 MB.

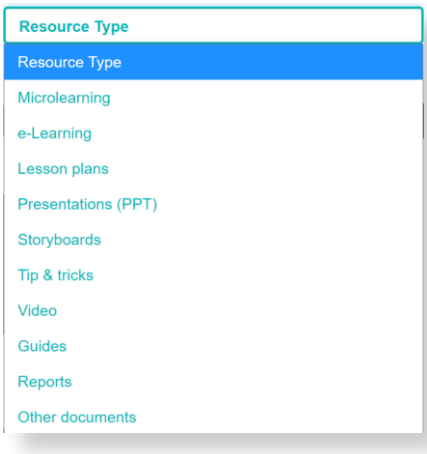


g. **Lesson plan** - - Put here the link to the place where the Lesson plan is stored. This will allow a user to download the Lesson plan of the resource when pushing the button **Lesson plan** in the **Teachers' Corner** page.(see the **Figure 70 - Content display in "Training catalogue" section**)

h. **Age group** - select the age group from the list

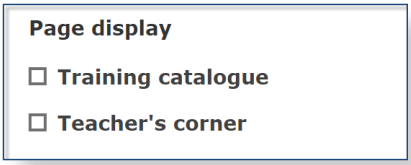


i. **Resource Type** - select the resource type from the list below, taking into consideration that "**Lesson plans**" and "**Story Boards**" will not be included in the Training Catalogue page. They will be only included in the "Teachers' corner" page.

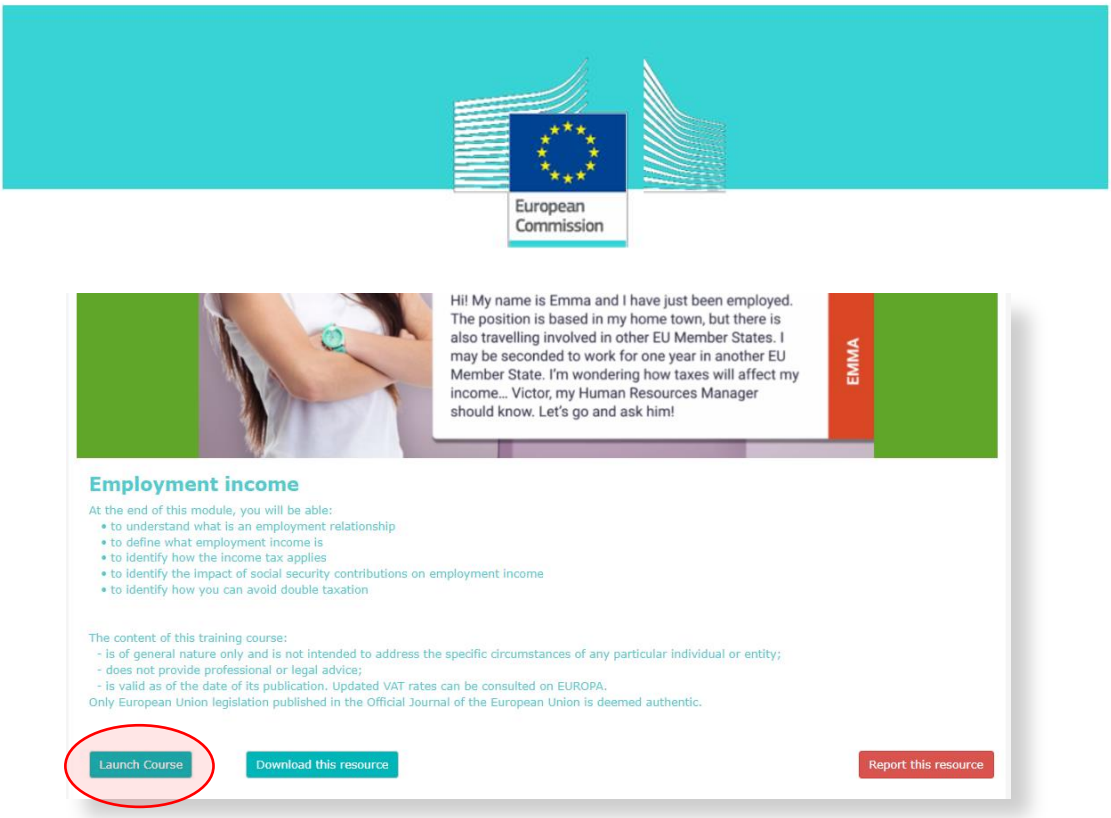


j. **Details** – Write a long description which contains relevant information about your resource

k. **Page display** – select the pages where you want your resource to be published after the approval by a **TaxEdu Editor** or a **Webmaster**.



l. **Launch Course** – Put here a link to a video resource that will be launched when a user push on the button **Launch Course** in the **Details** page of the resource accessed from the **Training Catalogue**.



m. Check "**I have read and understood the above requirements**"

n. Check "**I agree the material I want to upload can be downloaded by the others.**"

Step 4: Click "**Save**".

A confirmation message is displayed (which contains the information: the uploaded content has been saved and the content publication will not be done until it is approved by an administrator).

After an TaxEdu Editor or Webmaster approves the submitted content, the uploaded material (if the "Teachers' corner" page was been checked when the content was uploaded) will be displayed in "Teachers' corner" page as described in the next figure.

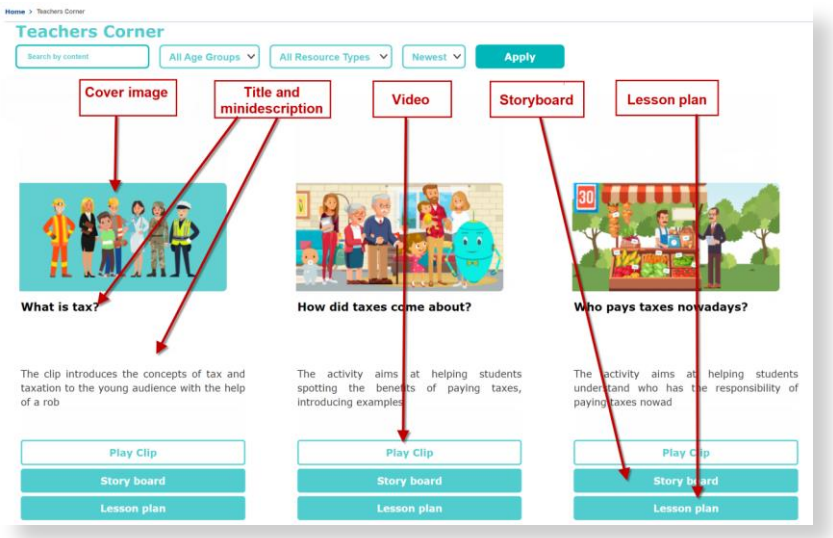


Figure 70 - Content display in "Training catalogue" section

5. Administration users

Administration users' permissions are explained in the document "**GUIDELINES for TaxEdu Content Management - Administrators**".