SiteWorks Administrator's Guide
Foundation
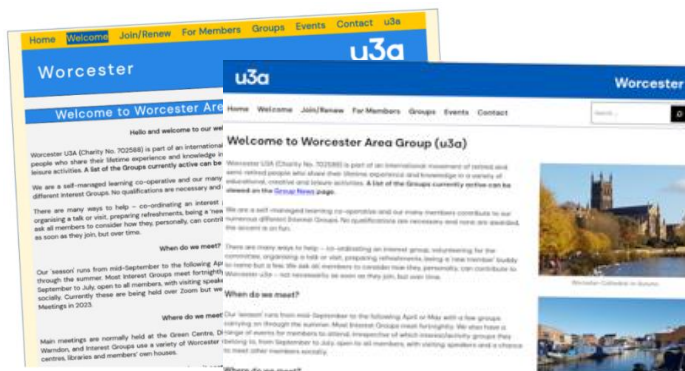
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Table of Contents

Change control

Revision	Version	Date	Reason for Change
	V1.0	December 2024	Initial Version based on Training Workbook for Migrating Web Managers
	V1.1	May 2025	Minor changes based on user feedback, WP changes and SiteWorks feature updates

Section 1 – Introduction

This guide focuses on the site Administrator responsibilities. The accompanying SiteWorks Foundation Editing Guide (the Editing Guide) focuses on creating and editing content. For many Web Managers these two guides will be all they will need but those with a more technical bias or wanting more complex applications are likely to find the answers in the **User Guide** [1] on the SiteWorks website.

This guide covers some additional editing functions that are site-wide rather than block specific as well as a few applications that are better controlled by the site Administrator rather than an author. It also covers u3a and 3rd party plugins, u3a SiteWorks and WordPress settings, and guidance on assisting others in your u3a to use SiteWorks. Both guides have been written informally using non-technical language as much as possible.

The site Administrator, usually the Web Manager, of any u3a site that adopts the standard u3a SiteWorks product does not need to be a techie as the vast majority of administration tasks are 'set-and-forget'.

The primary functions of this SiteWorks guide are to provide self-managed learning and guidance suitable for: –

1. A new Web Manager taking over an existing SiteWorks site

2. A Web Manager of a new u3a creating a SiteWorks site from scratch

3. A Web Manager moving to SiteWorks from a different website platform

You might wish to involve your Editors with **Advanced Applications** but Authors do not need to use this guide at all.

If you are a new Web Manager with no WordPress knowledge at all then that is not a problem. If you see yourself as a non-techie then that is not a problem either. This guide has been written for people like you and it starts at zero knowledge level.

If you are a Web Manager who does have WordPress experience then you do have some knowledge advantage as you already know the basics. You will be familiar with the concept of plugins but not the u3a plugins and what they do, so you will still need to learn this. If you come from a Classic WordPress background then you won't be familiar with the Gutenberg blocks and you can learn about those in SiteWorks Foundation Editing Guide.

Use this guide in the way that suits you depending upon your needs and your background.

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[1] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

1a How to Use this Guide

There is no need to learn anything by heart as you can always refer back to this guide when you need to. Even if you do read this entire guide from cover-to-cover there are many graphics and screenshots and it should only take around 2 hours +/- ½ hour depending on your reading speed.

New Web Managers taking over a SiteWorks site

You have taken over an existing u3a SiteWorks site and now you need to know how to use it. As you are the site Administrator you need to be able to do everything from making a few text changes on a page or replacing a graphic with another one through to setting up one of your Group Leaders as an author. You probably do not need all of these things immediately so prioritise and learn what you need when you need it.

Most u3a Web Managers spend most of their time updating pages so the sections relating to editing are probably where you will need to spend time initially. Most of your groups, contacts, venues, etc. will have been set up already. Learn how to create new items or edit what is there when you need to do it.

The good news is that you have an existing site so all of the initial administration set-up has been done already and most if it will probably never need to be touched again but this guide gives an outline of the processes with further details in the User Guide should you ever need it.

New u3a Web Managers with a new site

If you are a Web Manager for a new u3a then you will be getting a Starter Site. This is a SiteWorks site with a few general headings but no content so you are starting from scratch.

Depending on your background and experience you might benefit from trying out some of the content of this guide using **LocalWP and the u3a demo zip file.** This is discussed in more detail in the appendices of this guide and you will find links to both on the **SiteWorks website** [2] plus instructions for use. LocalWP runs on MacOS, Linux or Windows and generally you will need 4Gb of RAM and 1.5GB of disk space available. You probably need to start with the Administrator sections of this guide to get your site structure in place and then use the block creation and editing tools to add content.

If you are a Web Manager for a u3a moving to SiteWorks from another platform and hosting service then you will also be getting a Starter Site. You could also find using LocalWP and the u3a demo zip file useful. You could also use LocalWP to copy and paste data from your existing site into this development area to try out some layouts.

All Web Managers need to know about editing and administrative functions.

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[2] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

1b Navigating this Guide

Instructions for navigating this pdf-format guide can be found in the introduction section of the Editing Guide with full instructions in the appendices of that guide so please proceed there if you need help.

1c Setting Up Ready to Start

The first thing you need is to login to your SiteWorks site, This is applicable to all User roles and you will find full instructions in section 2 of the SiteWorks Foundation Editing Guide. It is in that guide rather than this one as the Editing Guide applies to all User roles and putting it there only saves duplication.

As the site Administrator how you approach learning SiteWorks will vary according to your background and experience. You can read all sections or dip in and out as needed but if you would like hands-on practice in a safe environment then please consider using the desktop software LocalWP and the u3a demo site as outlined above. This is just like using the real SiteWorks but runs on your desktop device instead so it doesn't matter how many mistakes you make during the learning process as it will not affect your live site.

Many of the screenshots shown in this SiteWorks Guide have been taken from the demo site but the demo is updated on a regular basis and although the background photos might vary over time the learning concept will remain the same so any changes will not significantly affect your learning.

Please note that WordPress release updates about twice a year and u3a plugin updates will probably be released at the same time. This guide will be updated to reflect any applicable new features and functions at that time.

1d The Small Print

There are some dos and don'ts that all u3a SiteWorks Web Managers are required to observe and you will find these in the Administration sections.

All website administrators, editors and authors are responsible for working to the conditions discussed in the Website Terms of Use and Standard Operating Procedures.

Website Terms of Use

Before you start you need to read the Website Terms Of Use. You should find this document, suitably customised for your u3a in the footer section of each page on your u3a website. This will provide a link to the Privacy Policy of your own u3a.

New Web Managers please note that your Starter site will come with a pro-forma of the Terms Of Use ready for you to customise. How to do this is covered in **Starter site tasks** in this guide.

To read the Website Terms of Use now you will find a copy of the non–customised version in the appendices of the SiteWorks Foundation Editing Guide.

Standard Operating Procedures – S.O.P.s

SiteWorks S.O.P.s are covered in **SiteWorks Admin tasks** section but you can read them now on the **SiteWorks website**. [3]

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[3] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

Section 2 – Plugins

This section is primarily aimed at Administrators although some parts could be useful to Editors, depending on how you have set up your site. If you are taking over an existing SiteWorks site then data should already be in place but you might need to edit that or add new information in the future. If you have a brand new site then you will need to create this data from scratch.

This section begins with an introduction to plugins generally, followed by six of the u3a plugins.

- The first four u3a plugins are Events, Venues, Contacts, and Groups and the combination of these enables you to create Groups and Events and to populate the data that is used in the placeholders on their respective pages.

- The u3a Import/Export plugin enables data for Events, Venues, Contacts, and Groups to be collected in advance using Excel and uploaded to a server site later. This plugin is only of interest to Web Managers with a Starter site as the data should already be in place on an existing site.

- The final plugin in this section is u3a Notices and this enables you to post time-critical notices on your pages.

Data such as group name, venue, activity, name of group leader, and so on is used again and again on your site. With the u3a plugins you enter this information once only and then call it up when needed without having to add any detail as you have already done it. This saves time and provides data consistency.

Please note that there are additional site-wide display options for Groups and Events and these are covered in a later section.

Two more plugins are u3a Settings and u3a Contact Form Log. These are discussed in the u3a Settings section later.

2a What's a Plugin?

u3a SiteWorks is based on Gutenberg WordPress which is an open-source software. What this means is that anyone with the technical expertise can use WordPress free-of-charge and write some additional code to extend the original WordPress capabilities.

That is exactly what our u3a SiteWorks Development Team have done. The additional code is called a plugin. The series of u3a plugins give us the ability to manage things that are unique to u3a such as our interest groups, events, venues, and notices. Administrators and Editors (where authorised) have the necessary authority to modify the content of the u3a plugins but all User roles can use the content such as adding a new event as discussed in the SiteWorks Foundation Editing Guide.

If you navigate to your Dashboard you will see a list of items beginning with u3a but also Plugins as highlighted below. Select plugins and you can see what is installed. The list appears in the main section of the screen and gives a description of what each plugin does.
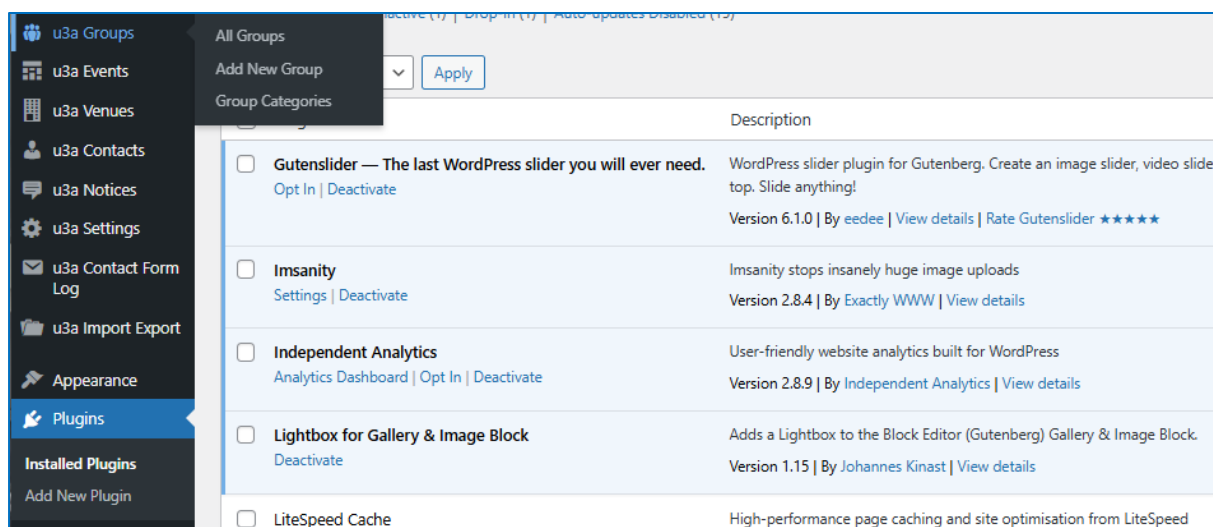
In addition to u3a plugins our development team have chosen and tested some 3rd party plugins that help us to manage or maintain our sites. There is a plugin that prevents us from uploading ridiculously large photos, for instance. These 3rd party plugins have been tested to ensure that they work with our customised version of WordPress and they are approved plugins. More plugins will be added in the future to extend the capabilities of the SiteWorks system even further.

When you look at the plugin list on your own screen, you'll see that some give you options such as 'Deactivate' or 'Settings'. Please **DO NOT** change any of these settings unless you are a WordPress expert and know exactly what you are doing. The only time any non-experts should touch them is if advised to do so by someone from Technical Support. This is a good case for 'if it ain't broke then don't fix it' as these plugins are what make our site do what it does. If you deactivate one of them then that element of your site won't work.

Non-u3a Plugins Warning

Thousands of 3rd party plugins are available but these have not been tested to work in combination with the u3a plugins. The installed plugins are currently the only items recommended by the SiteWorks team for use on u3a sites.

Any additional plugin that you install has the potential to corrupt your WordPress installation, disfigure your site, compromise any personal information you may hold on the site, embed malware, or allow your site to be used by hackers for nefarious purposes. Having said that, the facility to add plugins to WordPress is one of its greatest features and means you can easily tailor your website to meet your specific needs.

Web Managers may install other plugins at their own risk, but some external plugins may corrupt the u3a plugin functionality. Before raising any support issues regarding u3a SiteWorks, users must disable any such additional plugins and confirm that the issue still occurs.

Despite the above it has been found that Web Managers are trying out additional non-u3a plug-ins on their server sites and putting their sites at risk. Please review the Notice below. You will also find this in the plug-in area of the User Guide [4] on the SiteWorks website.

> ## Important Note
>
> The *SiteWorks* software distributions include all the required plugins. Web Managers or other users with Administrator privileges should be aware of the following important points:
>
> - If the Web Manager wishes to review the operation of an unsupported plugin, this **MUST** be undertaken on a LocalWP site **AND NOT** on the production site. Deleting "test" plugins may not "clean up" properly and can leave settings or data on the production site that can affect site operation and which can be difficult to sort out should a problem arise.
> - Web Managers are **discouraged** from installing additional plugins unless specifically advised or recommended by the *SiteWorks* team, as this may cause software issues, etc. If additional plugins are added, it is the responsibility of the u3a, to ensure that the cookie policy and other conditions within the Website Terms of Use and Standard Operating Procedures (in particular section 1.4) are maintained at all times.

Use of LocalWP

If you do intend to use 3rd party plugins then you should not instal and test them on your live site. Instead you should use an offline development software such as **LocalWP** [5].

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[4] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

[5] This link takes you to a page on the SiteWorks website where you will find information about how to get and install LocalWP. See also Appendix A

2b u3a Events

Events can be created and edited by all User roles where the necessary permissions have been given.
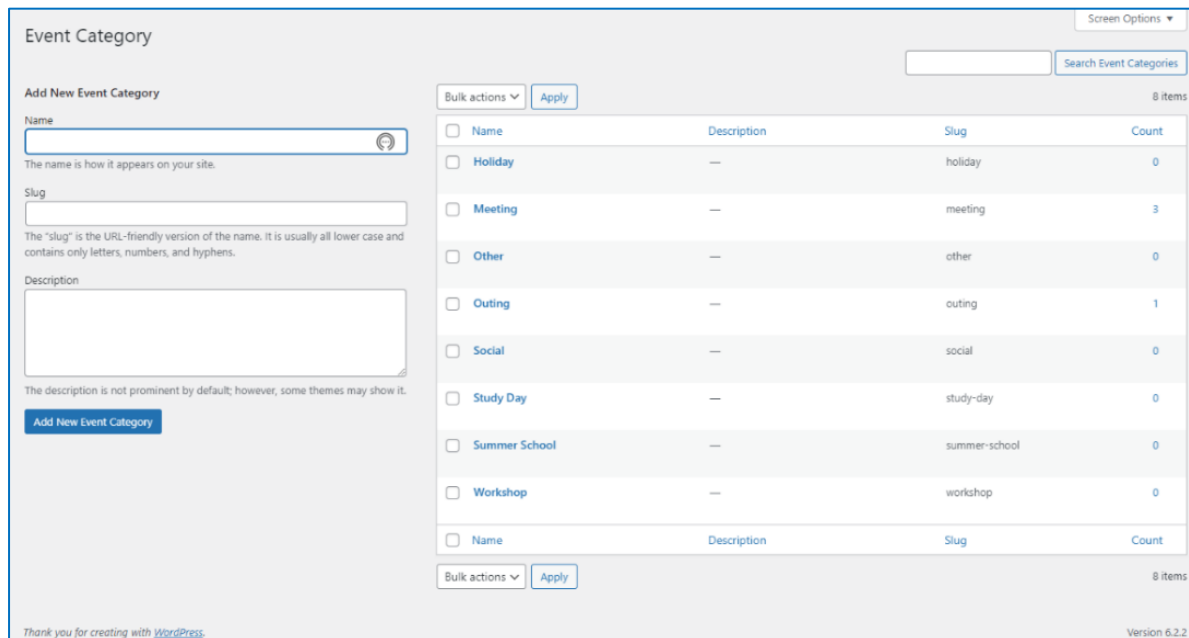
In the Editing Guide we discussed u3a Events and from that you should be able to add or edit an event on your site, including the drop-down menu section where the data you add appears on your event when published. The data you choose from those menus populates the placeholder. The data in those drop-down menus comes from data entered into other u3a plugins and these are covered in this section.

Event Categories

Event categories has been mentioned. Setting categories is an Administration function. Setting up categories for events enables you to filter them when you 'view all'. It makes it easier to navigate your site.

You can have as many or as few categories as you like but it's a good idea to group them so they are recognisable. A 'Talk' category could cover speaker talks across a number of groups, for instance. 'Outing' could cover multiple trips from a coach trip to a county house to an art exhibition. It helps members and visitors to quickly recognise the type of event coming up and if it would be of interest.

Adding categories is easy. Select Event Categories from the u3a Events section of your Dashboard and you will get the screen below.

Existing categories are listed on the right and you can add new categories on the left by completing the boxes then clicking on 'Add New Event Category'. Note that the 'Slug' field is populated by the system when you save your event.

2c u3a Venues

Venues can be created and edited by all Administrators and Editors where the necessary permissions have been given.

Data from venues is used in the groups section and can be used in the events section as well. Navigate to the u3a Venues menu on the Dashboard and you will be able to view saved venues or add a new one.

All Venues

Many of our u3as have venues that are used by multiple groups for activities. This feature enables information about the venue to be stored and called up when needed for an event or maybe a group meeting and the venue data is populated from the venue record.

Click on All Venues to see those already created. You can extend the choice by using the 'Add New Venue' option on the top line.

New Venues

When adding a new venue you are presented with a form like this so that you can add in the name of the venue with the address, postcode, and telephone number.

Complete as much as you can on this screen as all the data will be used. Select Publish top right to save the information. Later, when you call up the venue for a specific meeting or group event, you will be able to see how this data has been used.

Note that it is possible for two different people to create the same venue to use in a different way. This flexibility would allow, for example, two group leaders to each create a page called 'Museum Visit' with different content and it would not be a problem.

2d u3a Contacts

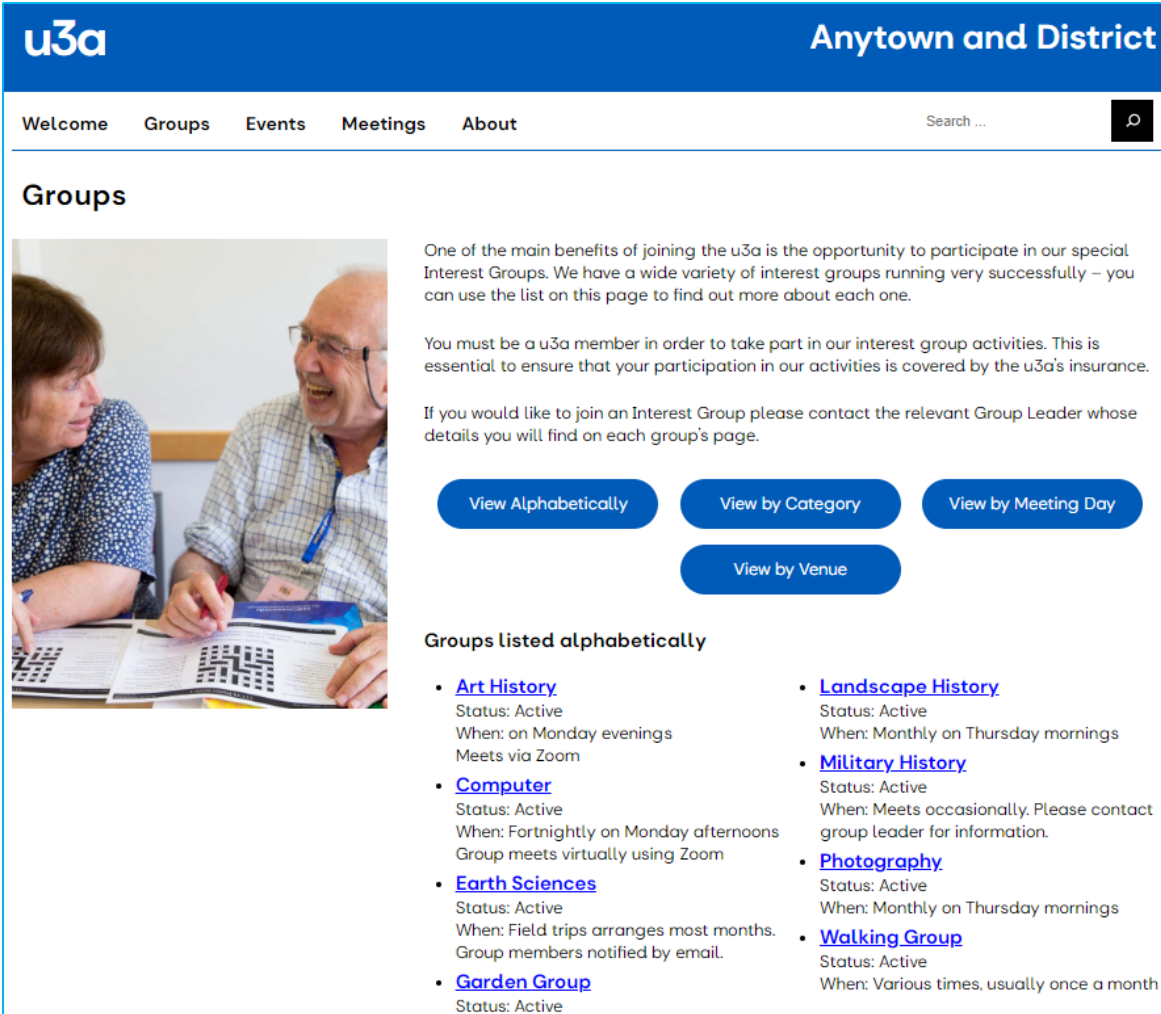Contact data is used on group pages but also on events pages and your Contacts page. Contacts can be created and edited by all Administrators and Editors where the necessary permissions have been given.

A contact is someone who can be contacted via your website such as a group leader or a committee member. The email addresses are cloaked (hidden) and cannot be seen on web pages for privacy reasons.

When you navigate to your Dashboard and find u3a Contacts you will; see that you can view all contacts or add a new one.

All Contacts

When you select all Contacts on the Dashboard menu, you will get a screen like this and view all of your contacts alphabetically: –
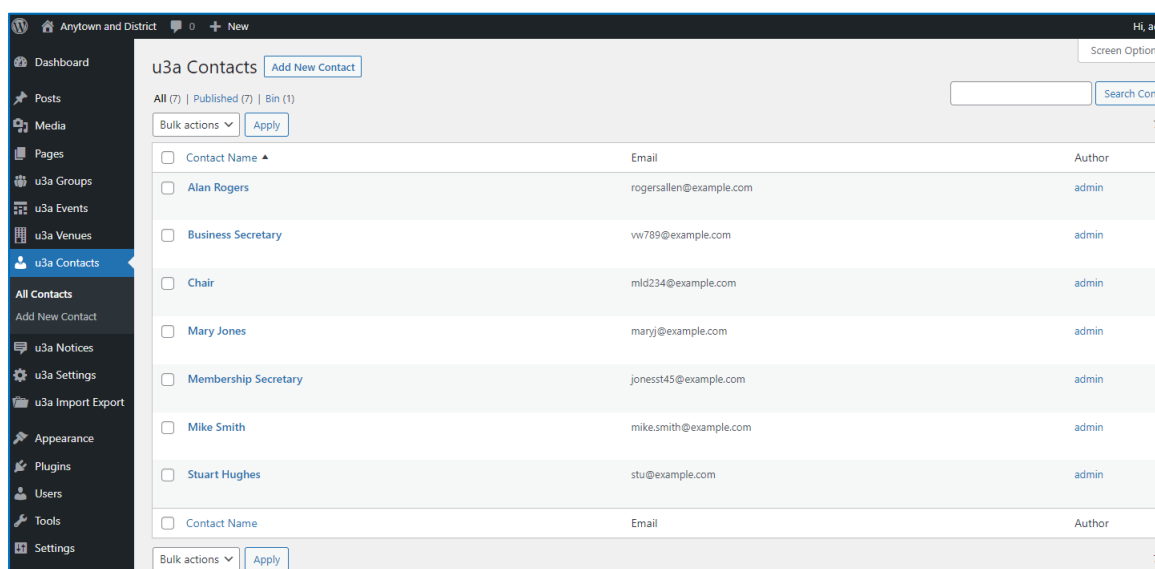
When you click onto the name of any contact on the list you will see the form with that person's details on it. You can enter as much detail as you like but this is a time to consider what you want to show on an associated group page as everything that you enter will be used and displayed on your site.

Some u3as show the full name of the Group Leader plus personal email address and phone number. Other u3as, perhaps mindful that our websites are public worldwide, prefer to show first name only with no personal details. Other u3as provide customised u3a addresses via a 3ʳᵈ party company. The email addresses can be cloaked (hidden from sight) right across the website via u3a Settings that are discussed later in this workbook.

Note that the latter is not the same as, say, chair.baanddu3a@gmail.com as used by committee members. These customised u3a email addresses also appear in contacts and can be set up to be used via a contact form. More about how to do this can be found the section about Starter Site Tasks. All of this should be in

place for a Web Manager taking over an existing site but will need updating from time-to-time to reflect committee changes.

As you enter details on the form please consider the policy of your own u3a and omit the telephone number or person's surname if these are not what you want to see on your group contact screen. As always please be aware of GDPR. Any personal details should only appear with the permission of the person concerned. In addition please be aware that if a telephone number is shown on any website then it can be 'harvested' by a bot and used for a variety of purposes.

If you try to delete a contact that is referenced as the contact for a group or for an event then the system will prevent this from occurring. An error message indicates which groups and/or events reference the contact. You need to visit the relevant groups and/or events and either remove the contact or substitute a different contact. You will then be able to remove the current contact.

Add New Contact

When you need to add a new contact you select Add New Contact from your Dashboard menu or via '+New' in Site View. Just as when you add a new venue you will be presented with a form. The top is where you enter the name of the contact as you wish it to display on your site and you can add more information using any block you like. The lower part of the form looks like this: –

Simply complete the form with as much or as little information as you wish according to the GDPR policy of your u3a and Publish the contact details.

2e u3a Groups

Groups can be created and edited by all Administrators and Editors where the necessary permissions have been given.

Our group pages are a source of knowledge to our members and where they can find out everything they need about an event or activity. These pages are also where we advertise our group's purpose and activities to new and prospective members and enable those people to contact group leaders via the website. There are many features that we can use to make our group pages attractive and content rich.

When you navigate to u3a Groups on the Dashboard and select it you will see that you have three options; All Groups, Add New Group, and Group Categories. We'll look at each in turn.

All Groups

In site view you see your site as others see it apart from the line at the top that gives you editing options when you are logged in. Select the Groups navigation button and you can view all of your groups as seen in the example below.

From here you can edit any general text and graphics relating to this overall group page just as you can edit any other page. You can also change the display options.

If you want to edit one of the group pages then select it from the list.

When I select Earth Sciences group on the u3a demo site and select the 'edit group' option I see a screen that looks like this: –
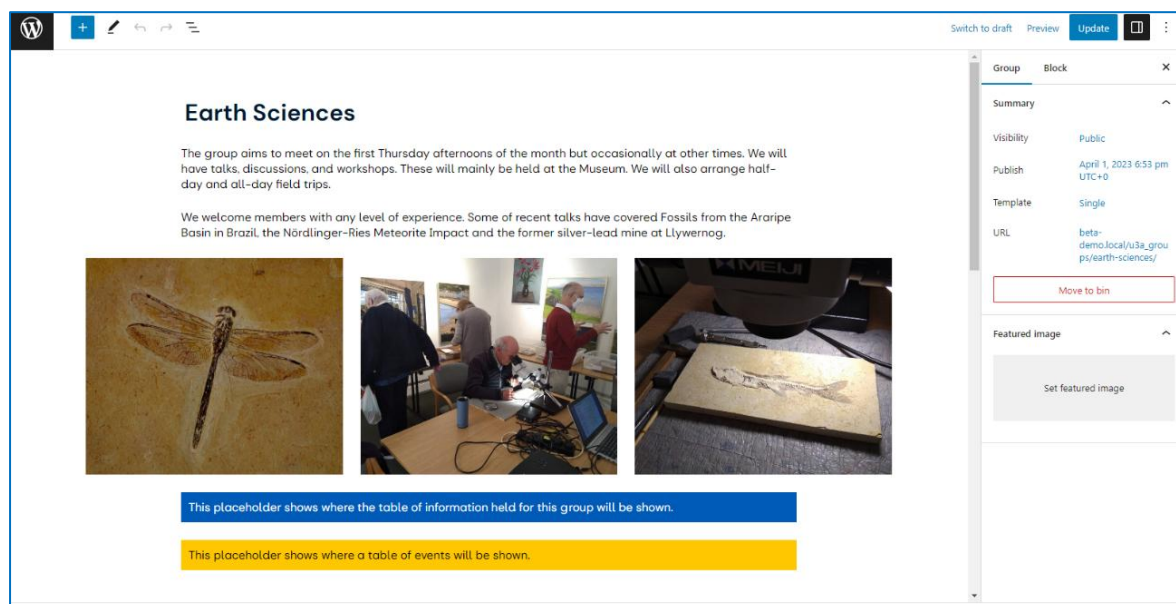

A reminder that we can get to this same page via the Dashboard and selecting the group from the groups list.

This screen style should be familiar from previous sections with the same editing options that you have been using.

What is new in this context are those two sections at the bottom. The blue placeholder is where information about your group or venue will be shown and the yellow placeholder is where group events will be listed.

Switching back to Site View for the Earth Sciences group I can see that it is the same as before except for some new information below the photos as shown below.
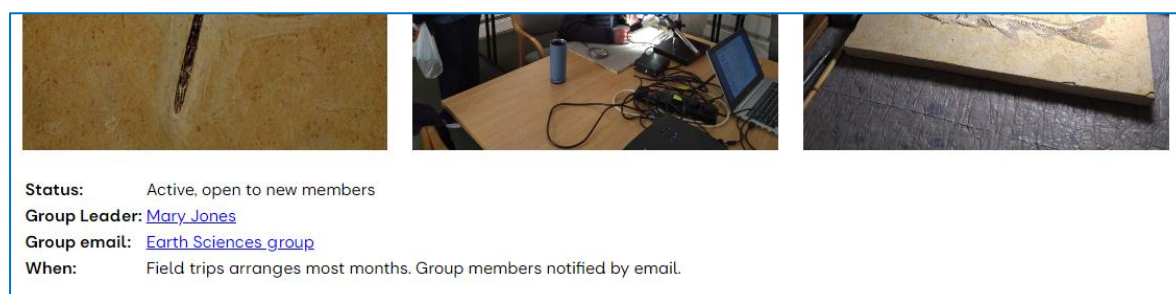
This new information lists the status of the group, the group leader, the contact email address, and when and where the group meets. This information has come

from the data that has been added to u3a Venues, u3a Contacts, and u3a Groups that you have supplied. Seeing how that data is used on a page will help you to decide how much information you supply in each section.

Note that if you would prefer that status and contact information to be at the top of the page instead of the bottom then return to edit mode. Select the blue placeholder and a pop-up toolbar will appear above, as it is a block just like other items on the page, and you can use the up/down arrows to move the block to where you want it on the page. I moved the block to the top of the page, and this is what it looks like now: -
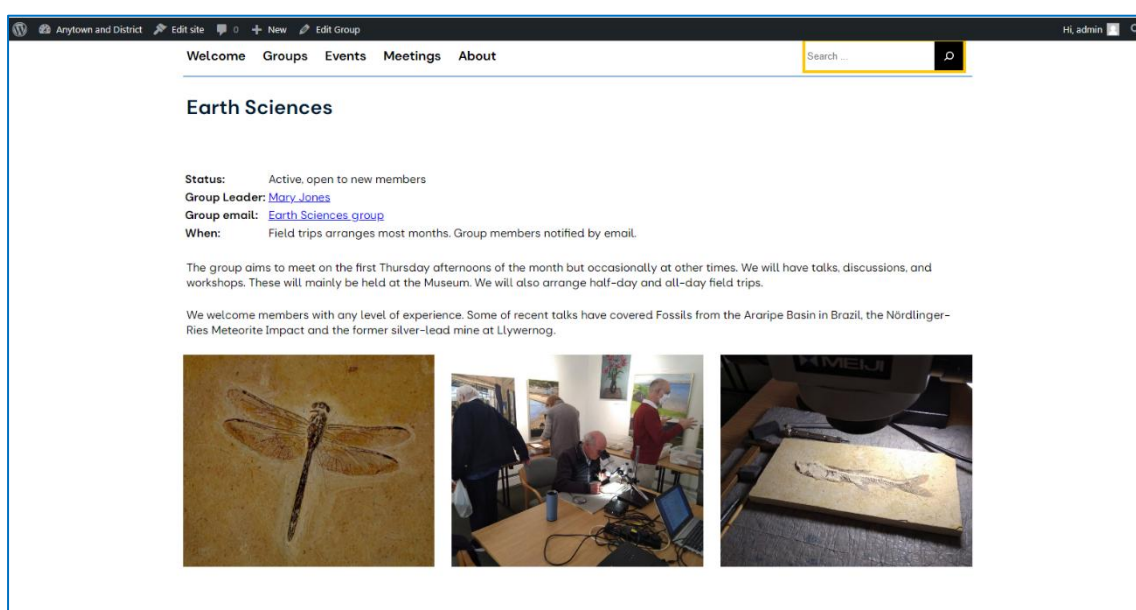
Where you place things on a page is your choice. It's your website. There is no right or wrong way but perhaps consider where you place important information so that those viewing it on a mobile screen don't have to scroll too far to find it.

If we look at the hierarchy of that page (the hamburger[6]) now there is a block called u3a single group data followed by two paragraph blocks, a gallery block, a u3a Events list block, a spacer block, and a columns block.

n.b. The hamburger is discussed in the Editing Guide in the 'three main editing tools' section. You can see the icon in the red circle in this graphic.

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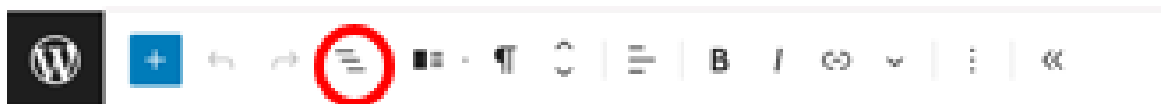
[6] Covered in the Editing Tools section of the SiteWorks Foundation Editing Guide

If you select All Groups on the Dashboard, you will see an alphabetical list of groups. The screen looks like this: –
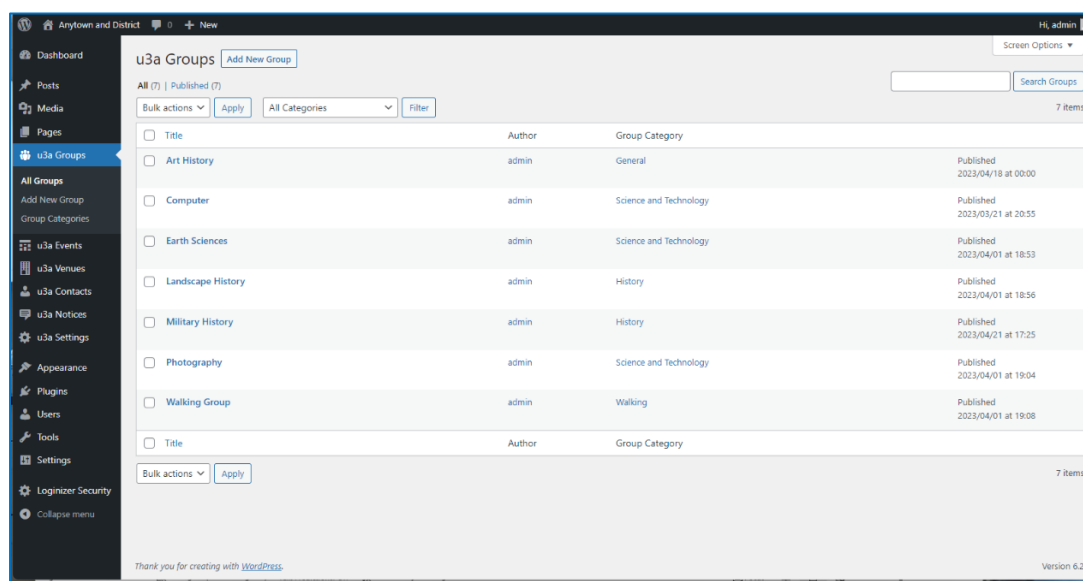
You will see the group name, the User type, the group category, and the group status. If you hover over any group title it will bring up options that are not available in site view. You can edit the group, quick edit, bin it, or view it. What these do is fairly obvious but you will find more information about quick edit in the SiteWorks Administration section as this is where you set the access permission for this group.

Add New Group

You can use '+New' in Site View to create a new group or you can do it from the Dashboard. Either way you'll get this screen form to complete It's a long form and only the top part of it is showing here.

As before you enter the group name on the top line (as you entered Event title before for instance). You then use the main space to provide information about the group using any text and graphic blocks that you want to use. You then complete the form using the drop-down menus and/or free text where that option is available.

The information you add to this form will be used by SiteWorks. The drop down-menus enable you to select the status of the group such as 'Active'. There are five options and they are self-explanatory. You must choose the category of the group. There is another drop-down menu to select the group category such as Dance, History, etc., or you can classify as General. This information is used for your different group views. You create the categories (described later in this section).

You next choose your meeting day and what part of the day the meeting takes place but you can add free text as well. You then add the venue, the group leader and deputy if there is one, the primary email address, and you have an option to state the cost if you want to and tick the box if members need to book for this event/activity.

As an example I added an Art & Architecture Group with photos and text plus the general group data from the drop-down menus and this is now my page : –

Art & Architecture

The Art and Architecture Group was founded to promote the appreciation and understanding of these twin subjects amongst our members and to increase our collective knowledge. We do this by promoting a series of events throughout the year, the principal event is a three night four day residential study visit to a city or area of artistic and architectural value and interest. During the stay we arrange visits to galleries and buildings of interest as well as leaving time for participants to make their own explorations. These visits are supported by talks, film shows, and more local visits to galleries and buildings throughout the year. Events are advertised individually by slides prior to the monthly meetings, by email notifications via the u3a Beacon system and on this website. There is no limit to the size of the group membership but individual events will have limits according to venue capacity or transport arrangements.

Status:	Active, open to new members
Leader:	Colin and Alice ✏
Leader:	Chris and Molly ✏
Group email:	Art & Architecture group
When:	Announced at the meeting and see Events
Venue:	See Events
Cost:	£5 p.a. subscription plus travel/overhead costs arising from individual events.

Note that the group leader names and contact details come from u3a Contacts so whatever you add there is reflected here. This is why you need to consider what data you enter on the u3a Contacts area so that you get the display here that you prefer. In this example the email addresses of the group leaders and the deputies have has been hidden (cloaked) but by clicking on either name or on the Group email the member or visitor will get a contact form to complete that will be sent to the preferred group contact.

Group Categories

The third item on the list when editing u3a Groups from the Dashboard menus is Group Categories. This is similar to but not the same as the categories we discussed in the Events section. If we visit any u3a SiteWorks site and view the main Groups page then you can see that there are four different ways to view group data.
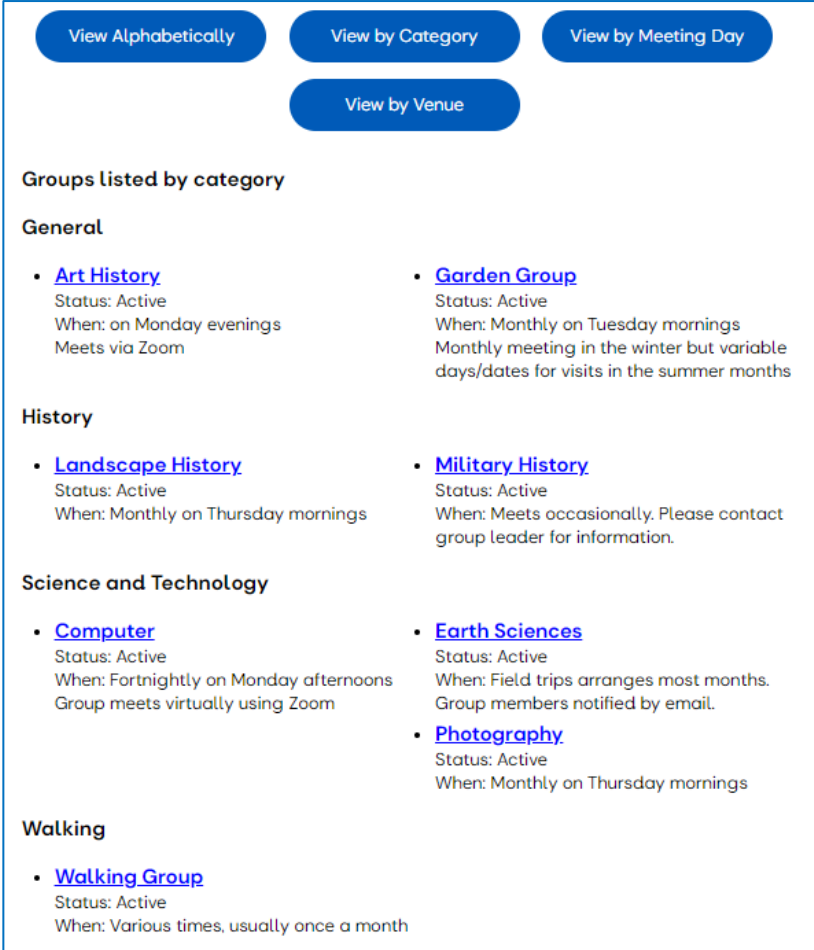
You can view the pages alphabetically as you saw on the first page in this section but can also view them by category, by venue, or by meeting day of the week. Earlier when looking at completing the form for the new group, category and meeting day were fields to complete. This is where that data is used.

You name the categories for your u3a according to the activities of your interest groups so that you can group them accordingly. Here is View by Category.

View by Meeting Day is useful for a member or visitor who has only certain days available in the week and wants to see what things he/she could do.

View by Venue is useful for the member who relies on public transport and is looking for activities that are easy to get to.

Members and visitors can click on any of the views at any time to see a different view.

View Alphabetically | **View by Category** | **View by Meeting Day** | **View by Venue**

Groups listed by category

General

- **Art History**
  Status: Active
  When: on Monday evenings
  Meets via Zoom

- **Garden Group**
  Status: Active
  When: Monthly on Tuesday mornings
  Monthly meeting in the winter but variable days/dates for visits in the summer months

History

- **Landscape History**
  Status: Active
  When: Monthly on Thursday mornings

- **Military History**
  Status: Active
  When: Meets occasionally. Please contact group leader for information.

Science and Technology

- **Computer**
  Status: Active
  When: Fortnightly on Monday afternoons
  Group meets virtually using Zoom

- **Earth Sciences**
  Status: Active
  When: Field trips arranges most months. Group members notified by email.

- **Photography**
  Status: Active
  When: Monthly on Thursday mornings

Walking

- **Walking Group**
  Status: Active
 When: Various times, usually once a month

2f u3a Import Export

The u3a Import Export was designed to help Web Managers with a new site to populate their Contacts, Venues, Groups, and Events pages. A Web Manager taking over an existing site will already have these areas populated so does not need this section. This section is not applicable to Editors and Authors.

Brand new u3as are starting from scratch with a Starter site but they probably do have some of this data already in one form or another. Initially the import capability was to help these sites to prepare their data in advance and enable a fast start when they got going on a server-hosted site. You don't have to use this. You can key your data directly into your Contacts, Venues, Groups, and Events pages as outlined above.

Import data

The first task is to complete the worksheets. To get a copy of these click on u3a Import Export on the Dashboard and you will get this page.
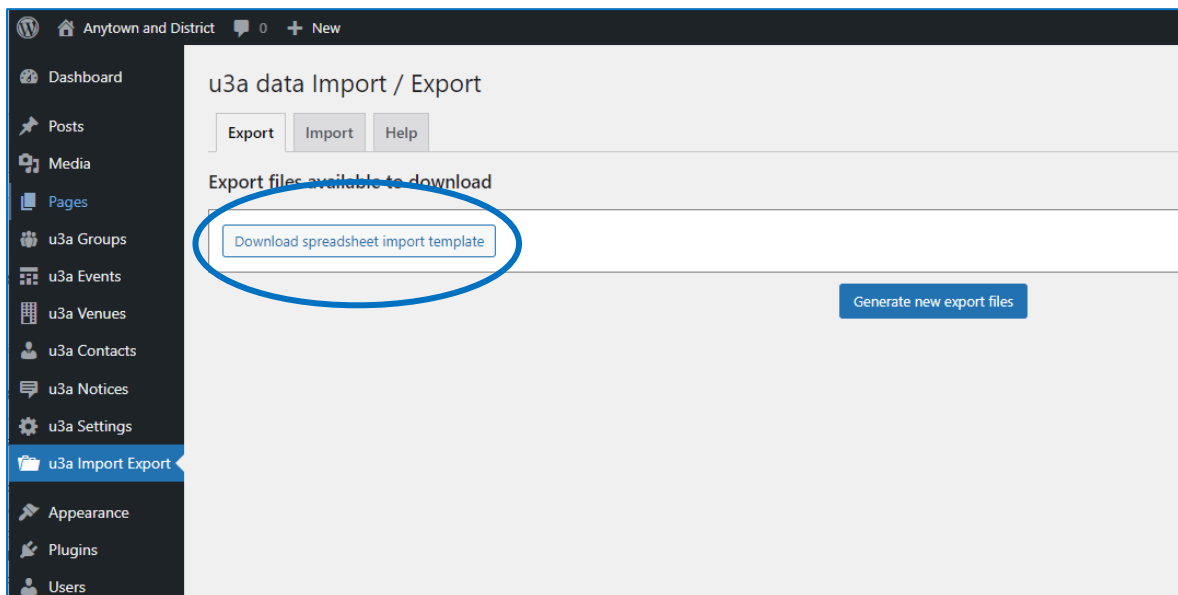
Click on Download spreadsheet import template to get your file. There are five worksheet tabs including one that provides completion instructions.

Add your data according to the instructions and save every worksheet separately as a .csv file.
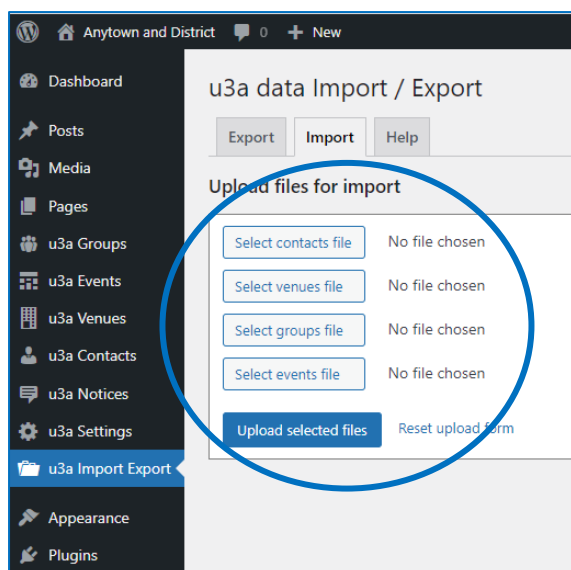
There are two stages to uploading a file.

First upload the file. It will be checked to make sure the content appears valid. If there are any problems these will be displayed showing the line numbers in the file where they occur. If any problems are detected the file will not be accepted.

Import the file into WordPress. One you have successfully uploaded all the files you want to import, click the button 'Import files into WordPress'.

The process of importing files may corrupt your WordPress database. Please make sure you have a current backup of your website before proceeding.

It is recommended that if you have several files to import that you do them in the order Contacts, Venues, Groups then Events. It is a good idea to check that each individual file has been imported successfully before continuing to import the next file.

Export data

The export facility also enables you to export the same sets of data in reverse.

To generate a fresh set of export files, click 'Generate new export files'. To download an export file, click the appropriate Download button. Most web browsers will save this file to your Downloads folder.
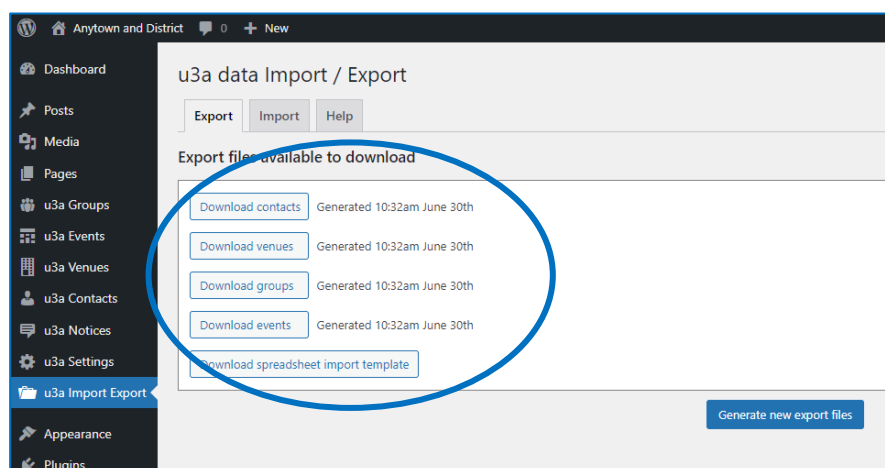
Help

The third tab in this menu is Help and this provides you with assistance on both import and export.

2g u3a Notices

Notices can be created and edited by all Administrators and Editors where the necessary permissions have been given.

A Notice is something you can put onto one of your pages to draw attention to something for a limited period of time. A Notice could be used on the Home page to remind all members of such things as a forthcoming social event, due date for annual subs, a change to a meeting date, or cancellation of an event due to bad weather. Only an Administrator or an Editor can create or edit a Notice.

All Notices

When you select u3a Notices on the Dashboard you have a choice to view All Notices or to Add a New Notice. Let's view them first.

This example shows six Notices with varying start and end dates. The ones where the end date has passed remain on this list until deleted but no longer show on the site page as the date has passed. They remain on the list until you delete them.

Add New Notice

You can add a Notice in Site View using '+New' or you can add one from the Dashboard. You are presented with a form which is self-explanatory. Enter a title and the text of the Notice where indicated at the top of the screen.

As usual you can choose which block(s) you want to use. If your Notice is about an exhibition at a local gallery for instance, then you could include a link to the relevant page of the gallery's website in the URL Notice field. Towards the bottom of the form you can set the start date for the Notice and the expiry date. Publish then confirm Publish when prompted. Your Notice will then appear in your Latest Notices section between the set dates.

On the menu there is an option to add an excerpt. This is a short section of the Notice that describes what it is about to encourage members or visitors to click on it to find out more.

On the Welcome page of the u3a demo site a Latest Notices block has already been set up as seen below.
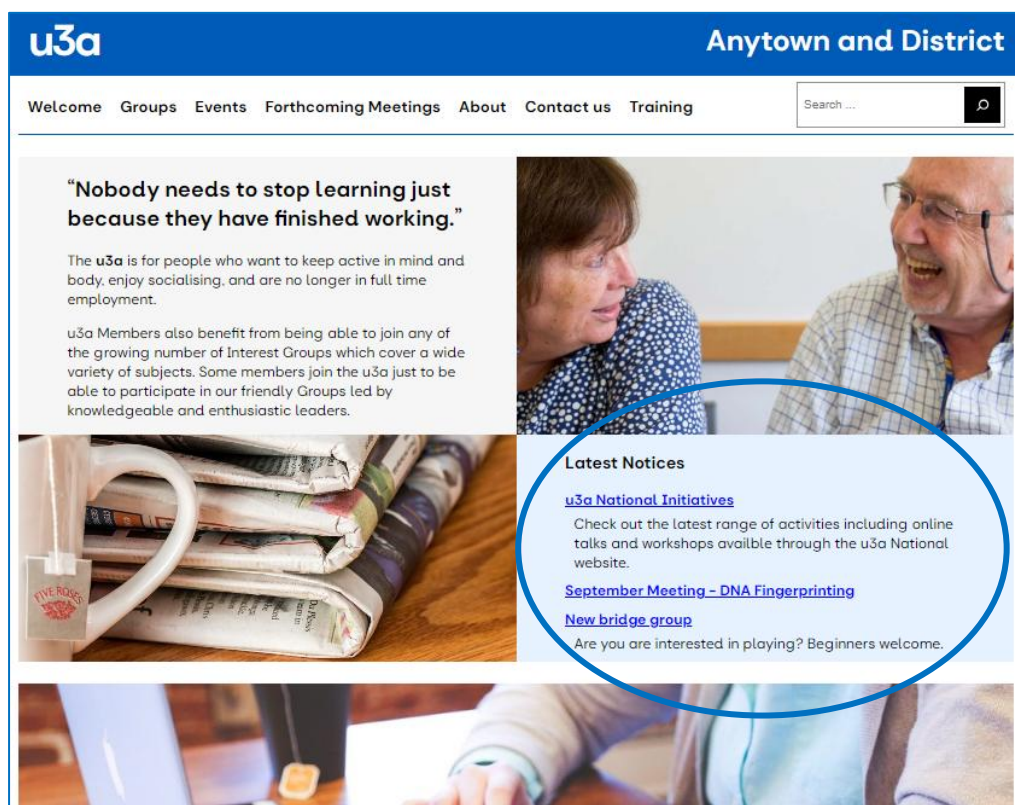

Any new Notices will also appear here. You'll notice the background of the text of the Notice has been coloured.

Notice Block

If you have not used the Notice function before and don't have a Notices section on your site already then you need to set one up so that you have a place to put your notices. In Site View select Edit Page on the page where you want your notices to appear.

Below is from a u3a site and is a 3-column block with one column being a paragraph block, one column blank and used as a spacer, and the final column used for notices. You can see this here on the screenshot from the hamburger.
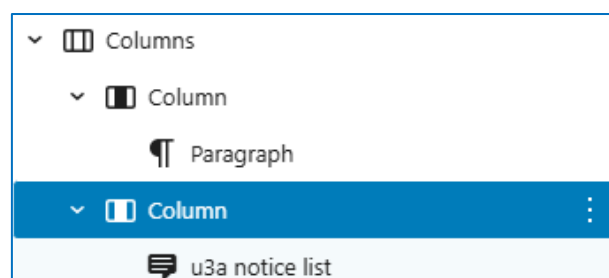
Membership is open to everyone who is no longer in full-time work. u3a gives retired/semi-retired people a unique opportunity to do something different and offers people like us the chance to make new friends, develop new skills, have new experiences, and really get out and enjoy retirement. Membership includes free admission to the monthly meeting plus our quarterly LINK magazine and also a quarterly copy of Third Age Matters, the national u3a magazine. You also have access to our own interest group activities as well as those of the wider u3a.

Latest Notices

Link Deadline

Christmas Lunch

2025 u3a Calendar

Christmas Market Day Trip

To add a notice area hover below the Latest Notices block until you see the Add New Block facility and add a u3a notice list but if you can't remember the exact name of a block then you can type a word you think describes what you are looking for and see what comes up. Typing notice in the box brings up u3a notice list so select that and you will get a placeholder like this one.

This placeholder shows where the latest notices will be shown.

Page   Block   ✕

💬 **u3a notice list**
      Displays current notices

Title   ⌃

TITLE

[Latest Notices]

🔵 Show Title

ORDER BY START OR END

[Start   ⌄]

ORDER

[Descending   ⌄]

MAX NUMBER TO LIST

[No limit   ⌄]

If you select the blue Notices Block above you will see a settings menu on the right of your screen with various options as shown here.

Save and view the page and you will see that you now have a Latest Notice block. This demonstrates that the u3a notice block simply displays active notices from your u3a Notices list. You could place a u3a notices list on a different page if you want to but it will still display the same notices. There are sometimes good reasons for doing this if the same message is required to appear on several pages so that it is not missed, for instance. If a different message is required on another page, then this can be achieved using another block such as a coloured Paragraph block or perhaps by adding a Post. (See Editing Guide for examples)

u3a Plugins Summary

In this section we discussed plugins, quickly reviewed u3a Events, and looked at how to add and edit u3a Venues, Contacts, Groups, and Notices. We also looked at using u3a Import Export to import this data into a Starter site.

Section 3 – Starter Site Tasks

A Web Manager taking over an existing site should already have the link to the Website Terms of Use displaying on every page of the website, usually in the footer section and it is unlikely that this will ever need to be changed. A Web Manager with a Starter site needs to customise the pro-forma provided.

A Web Manager taking over an existing site should already have a Contacts page for committee members set up but this will require updating when committee members change. A Web Manager with a Starter site needs to set this up from scratch.

3a Setting the Home page

The Home page is the page that is displayed when someone visits your website without specifying any particular page in the URL or clicks on the "Home" link in the site menu. On new SiteWorks sites, the Home page is set to a suitable page but it can be changed later if required.

The 'Home' page can be modified in the site settings to the page of your choice or the choice of your u3a. Your SiteWorks Supporter can assist with this at the time of site set up if needed.

3b Website Terms of Use

The website Terms of Use was discussed early in the Editing Guide and a sample of it can be found in the appendices of that guide. All Users who will be editing your website should read this document so as to be aware of legalities such as copyright and privacy laws.

When you, as a new Web Manager, gets your Starter site (or if you are using LocalWP and working on the u3a demo site) you have probably noticed the 'Website Terms of Use – Draft' item in Pages on the Dashboard. Please navigate to that page now.
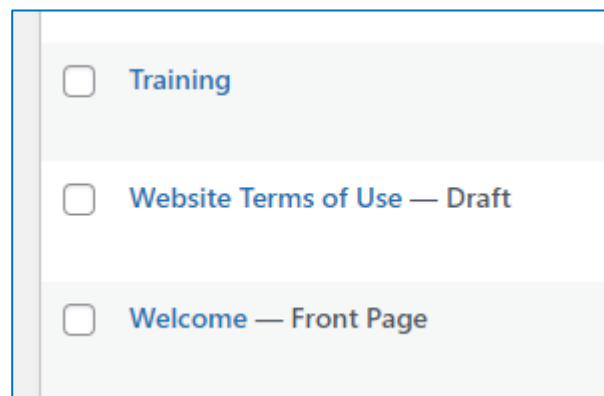
It is strongly recommended that all u3a SiteWorks websites display this page or their own equivalent version of it. This supplied page uses the wording proposed and approved by the Trust and has been approved by the Trust's legal team. It has been designed to appear in the footer area of all web pages.   The Footer page template part includes the shortcode [u3a_policy_notice].   The effect of this shortcode is to look for a page with the page slug 'website-policy-notice'.   If

this page exists and has the status of Published then a link to the page will be automatically included in the footer.

The steps to customise and publish this page are:

1. Edit the "Website Terms of Use" draft page to replace all highlighted text with information appropriate to your u3a

2. Publish the page

Once this has been done, the footer will show a link to the page that looks like this: –

Clicking on 'Website Terms of Use' brings up the page.

The draft document contains highlighted text like that shown here.

It is these highlighted areas that need to be customised with your u3a details. They include the name of your site, your charity registration number, a contact email address, and a link to your u3a Privacy Policy*.

* Every u3a should also have a Privacy Policy already but policy document templates can be found on the Trust's national website as usual if required. The template file, in editable docx format, can be downloaded from the Trust's website in the "Support for u3as" section. The URL for the file is **https://www.u3a.org.uk/edocman-downloads/privacy-policy-template** As with all documents in this section, a login to the website is required. This

document also requires customisation and should be approved by your committee before publication.

Once you have made all of the necessary amendments then publish the page to take it out of draft mode.

Notes regarding the Terms of Use document

The u3a may change the title of the page, but for the shortcode in the footer to work, the page slug of 'website-policy-notice' must not be changed.

If the u3a edits the default footer template part provided with the theme, they may choose whether to retain the [u3a_policy_notice] shortcode and where to position it, or they can replace it with a link to an alternative policy page of their own.

A u3a is of course free to ignore this page entirely or replace it with one of their own. The page can be deleted. If it is not present then the link will not be included in the footer.

3c Committee email contact page
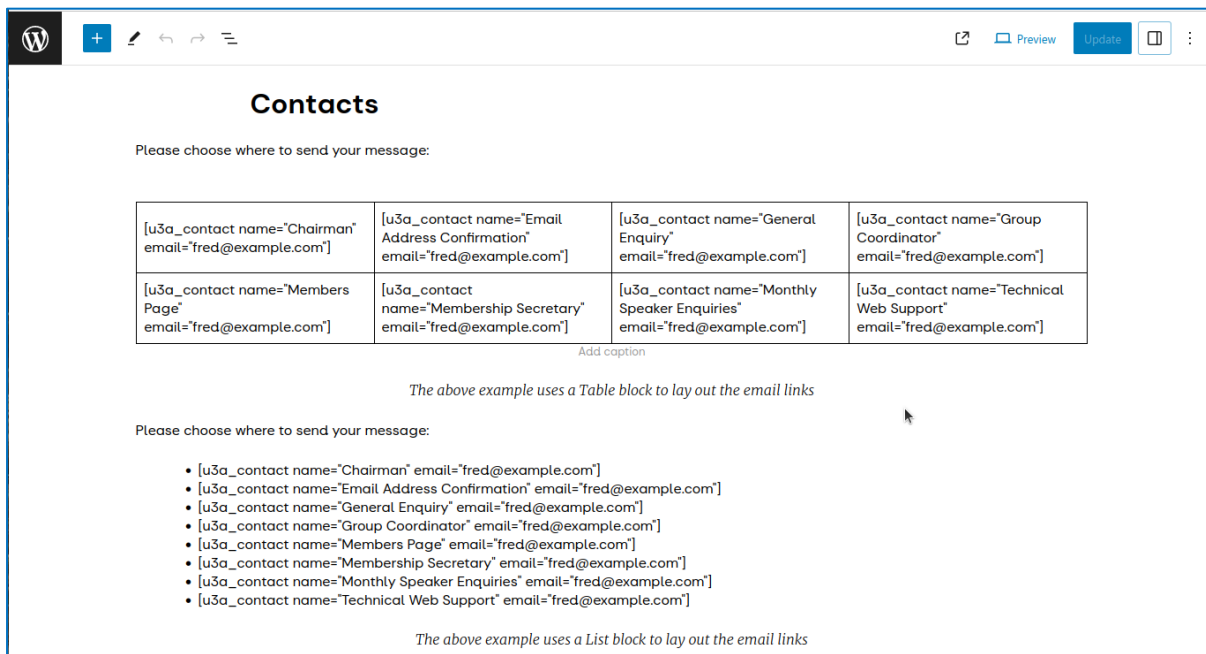
One thing all Web Managers need to do is to create a contact page for committee members. Web Managers taking over an existing site should have this in place already and will just need to update Contacts from time to time plus names on the contact page. New Web Managers with a Starter site will be doing this from scratch.

The contact form mechanism in SiteWorks uses an approach devised to minimise the chances of spammers automatically sending messages using the contact form. Whenever a contact form is displayed, it is generated using a unique time-limited code which ensures that the form can only be used to send a single message. The form is only generated in response to a click on a link that has been generated using the u3a_contact shortcode (or automatically by one of the u3a SiteWorks Blocks).

It is technically not possible to have the contact form links on the same page as the contact form itself. We need to use the appropriate u3a_contact shortcodes.

The design and layout of the contact form is entirely up to you but what follows should help you to decide what you would like to do. You might want to get onto LocalWP now and create a Committee Contacts page to follow this section.

Here's an example, showing a table block and a list block, two of the many possible ways of laying out the contacts:

This screenshot is showing two ways to add Committee email information to a new Contacts page. In this example Nick has used the full form of the u3a_contact shortcode, but if the contact names are in your u3a Contacts already then you can use the short form which omits the email address, as in [u3a_contact name="Chairman"].

When shown on the front end of the website, this will appear like this:
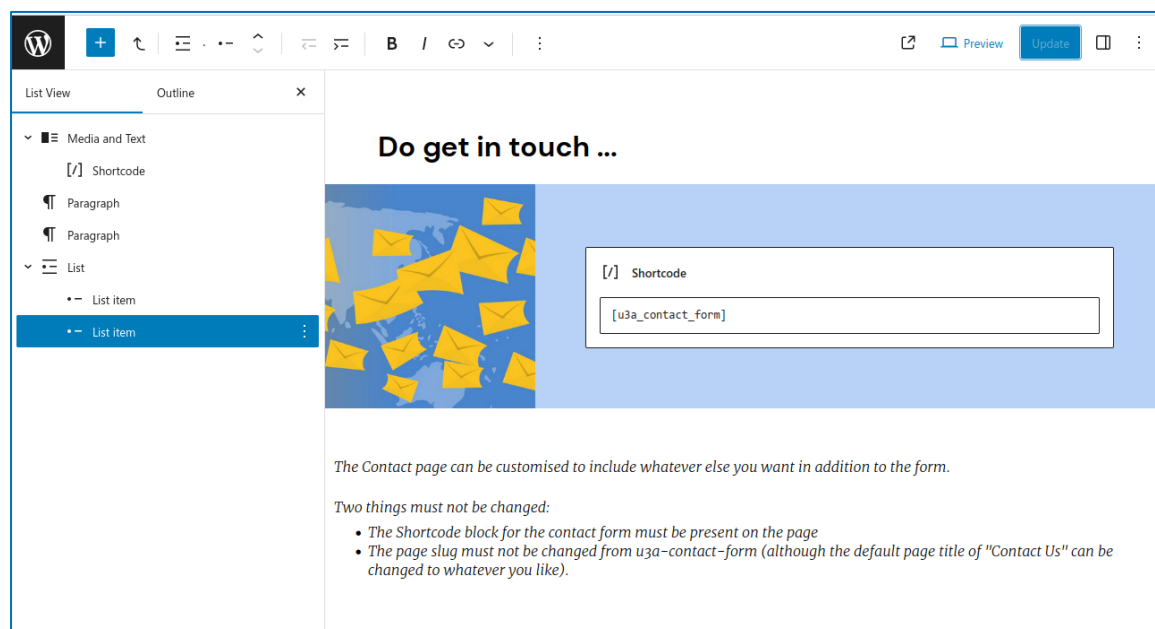
Note too that the Contact form page can also be customised to your requirements. Here's an example which puts the form inside a Media and Text block:

When shown on the front of the website in response to a click on a contact link, the contact form now looks like this:

If viewed on a smartphone it looks like this:

In conclusion, the approach taken in the SiteWorks plugins is flexible and provides far greater scope for u3as to produce contact lists that contain exactly the information they want and presented in whatever way they choose.

3d Navigation buttons, Headers and Footers

The navigation buttons, headers and footers appear on every page. For existing sites they will already be in place and probably won't need changing any time soon. For Web Managers with a Starter site you will have some basic buttons but will probably want to add more.

Navigation buttons

When logged in to your site this time you need to select 'Edit site' on the top line.
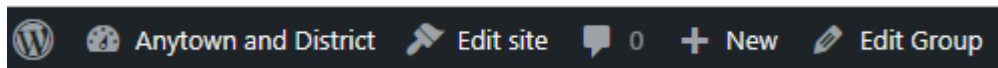
This will bring up the following screen (though not the same buttons) as seen below. I have selected (double-clicked) on the navigation buttons and now have a '+' sign at the end of the row. I also have the Navigation block in the editing panel to the right. As you will see when you do this on your own site the names of the navigation buttons are listed on the editing panel .
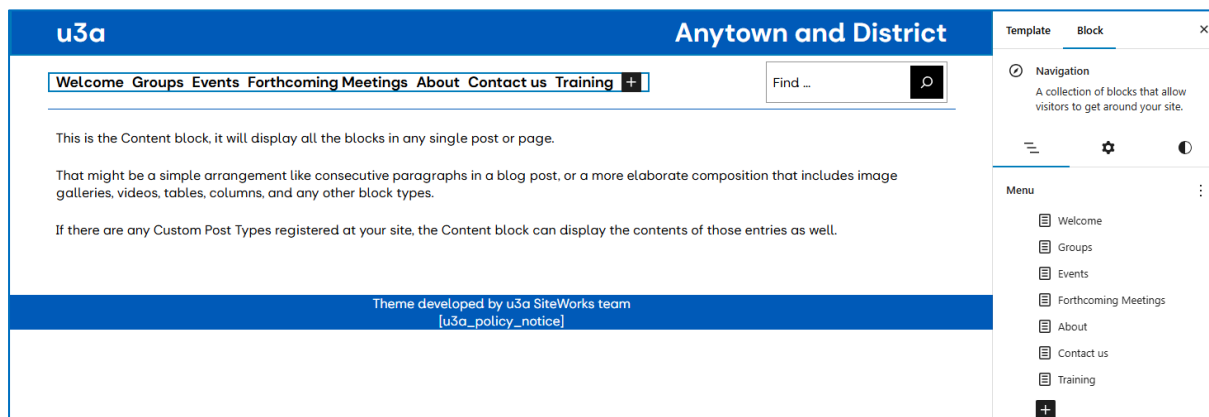
You can see that there is a '+' sign at the end of the horizontal list of navigation buttons and also a '+' sign at the bottom of the vertical list on the editing panel. If you want to add a new button then use one of the '+' signs to do it. You can then use the pop-up toolbar in the buttons section to move the new button left or right as desired or you can select it on the editing panel and drag to the position you want it to be in. Note that on the editing panel you can select and drag slightly to the right of an existing button to give you a drop-down button like this. Navigation buttons that have a drop-down menu have an arrow alongside the button name.
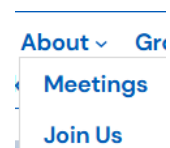
Save your changes when done and view your page.

Editing the Header and Footer

Select 'Edit site' as above and click into the top heading. If you click into the name of your site then it is possible to edit it but you should not do this as this would change your URL and affect search results. Instead click into the empty space and you will be able to add a block of your choice in the same way as you add blocks elsewhere on your site. Some u3as have their own logo that they wish to display here. Others want their registered charity number to appear in this space but there are other applications as well.
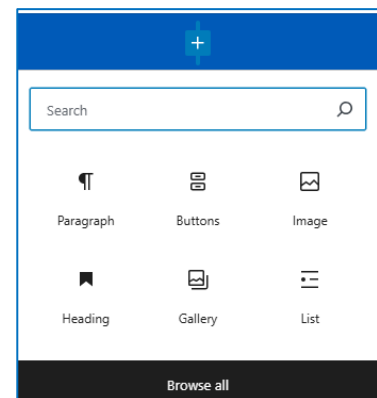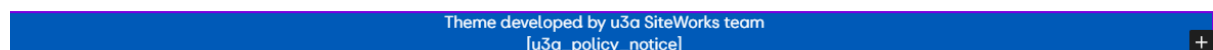
Edit site and you can modify your footer as well. All SiteWorks sites come with two built-in footer blocks. One states, 'Theme developed by u3a SiteWorks team' and the other is a placeholder for the Website Terms of Use, described earlier in this section. Neither of these should be deleted but you can reposition if you wish.

As with the header you can add extra blocks in the blank space. Perhaps this could be your u3a logo or registered charity number.   Here is one site with the registered charity number and the two built-in blocks repositioned.
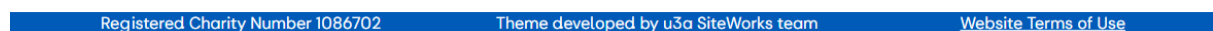
You can customise your header and footer but you must not change your site name nor remove the two built-in footers. Save any changes you make and view your page.

3e Go-Live checklist

Your SiteWorks Supporter will have a ' **Go-Live checklist** '[7] that he/she will go through with you to ensure that all tasks have been completed to mutual satisfaction before your site goes live. The SiteWorks Supporter will ascertain if any further follow up is required and schedule this accordingly.

Summary of Starter site tasks

Most of the Administration functions will be 'set and forget' but it is worth knowing how to change them or at least where to look. In this section we looked at setting the Home page, customising the Website Terms of Use, setting up the Committee email contact page, modifying navigation buttons as well as headers and footers, plus the go-live checklist.

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[7] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

Section 4 – Site-wide Editing of Groups & Events

In the Editing Guide we covered creating and editing Group pages and Events. In the main, the Editing Guide includes things that all categories of User can access but there are some additional things that are available to Administrators because they affect the whole site rather than just one group or one event. An Administrator can set the way that Groups and Events are displayed, for instance.

Recent u3a plugin updates have provided a number of additional display capabilities. They provide some nice editing and display enhancements for groups and events. There is also a new u3a plugin called Contact Form Log that enables a site to identify robot activity, for instance (covered later in **u3a Settings**). WordPress has added a drop shadow option to items such as buttons, as discussed in the Editing Guide.

New features/functions video

Our Lead Developer, Nick Talbott, prepared a video that covers these recently released features plus the dropped shadow option that was discussed in the Editing Guide. You might want to watch this video now. **Here is the link**. [8]

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[8] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

4a u3a Groups Display options

The main enhancements to groups are being able to show or hide items such as status, time, and venue, ability to display in alphabetical order groups horizontally or vertically and filtering groups by category. You also have control over the sort order of the groups.

Multiple categories

The new capabilities include allowing multiple categories to be assigned to a group so that they can display in more than one category on the main groups page.

A card and board games group could have the category of Indoor games but also be allocated the Social category so would show in both categories in the main display.

An Art & Architecture group could be categorised as Art, Cultural, and History, for instance and this example can be seen here.

Art & Architecture

Art & Architecture
Status: Active
Venue: See Events
Announced at the meeting and see Events

Drawing and Painting
Status: Active
Venue: West Auckland Memorial Hall
on Tuesdays
1st & 3rd Tuesdays 1 – 3 pm

Cultural

Art & Architecture
Status: Active
Venue: See Events
Announced at the meeting and see Events

Theatre Visits
Status: Active
Venue: Theatre Royal, Newcastle
Announced at the meeting and see Events for dates

General

u3a National Festival
Status: Active
18th to 20th July 2024

History

Art & Architecture
Status: Active
Venue: See Events
Announced at the meeting and see Events

Genealogy
Status: Closed

Local History
Status: Active
Venue: Bishop Auckland Methodist Church
on Fridays
2nd Friday 10 for 10.30

u3a groups list block updates

There are items that you can show or hide when displaying the groups list.

Navigate to your Groups page and select edit mode. Select the u3a groups list block (the placeholder) as seen here. The u3a groups list editing panel appears on the right.
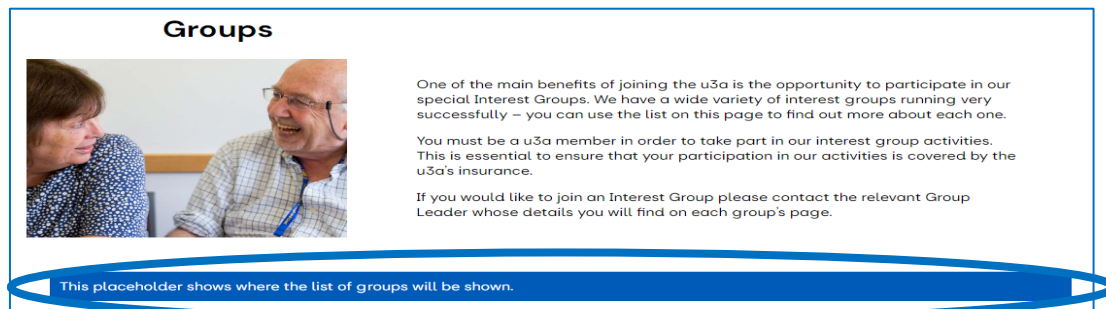
Within the red circle in this editing panel screenshot you can see Category, Sort Order, Alphabetical Flow, and the three button options.
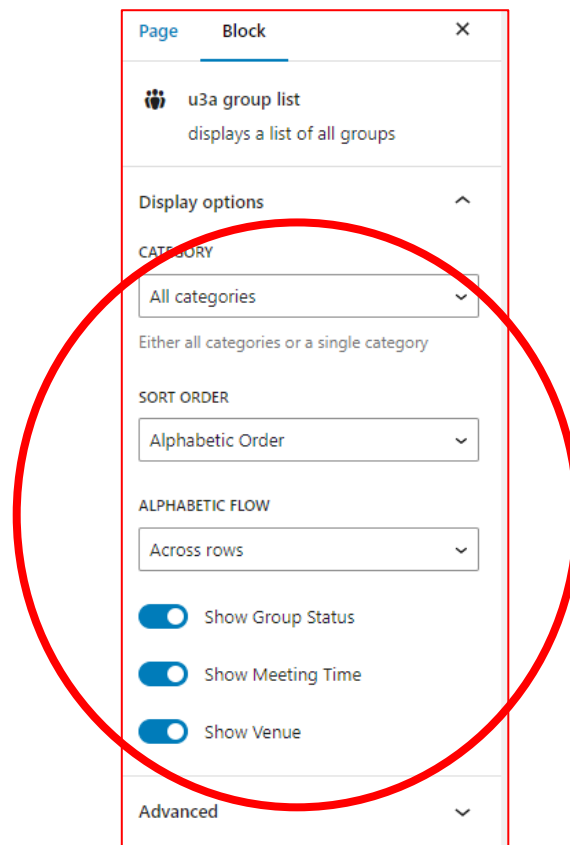
Category display options
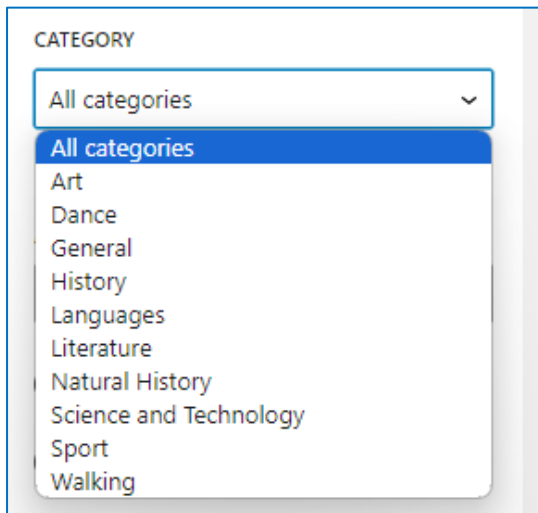
Select the arrow alongside CATEGORY and you will get a drop-down menu showing the available categories on this website.

I have chosen to display any groups in the Walking category by selecting that category.

Updating and viewing the page now gives me my main group page that is only showing groups related to walking. In this case there is only one as you can see.

Sort Order

Now select the drop-down menu in the Sort Order box and you will see you have a choice of category, date, or venue. I have selected By Venue and you can see the lower half of the resulting page here.

SORT ORDER

Alphabetic Order	⌄

Alphabetic Order
By Category
By Date
By Venue

Alphabetical By category By meeting day By venue

Groups listed by venue

Member's Home

   Military History

Metropole Hotel

   Art History

Sports Centre

   Earth Sciences   Landscape History

YorkOne

   Computer   Photography

Unspecified venue

   Walking Group

Alphabetical Flow

Since SiteWorks was launched there has been an option to view groups alphabetically down the page but using this feature this can be changed to view across the page instead. Here is a vertical example.

Groups listed alphabetically

Art History	Landscape History	Photography
on Monday evenings	on Wednesday mornings	Monthly on Thursday mornings
Computer	Meets occaionally	Walking Group
Fortnightly on Monday afternoons	Military History	on Wednesdays
Earth Sciences	Meets occasionally. Please contact group	Various times, usually once a month
on Wednesday afternoons	leader for information.	

If you select the drop-down option in ALPHABETICAL FLOW you have the option to select rows across or down the page. I have selected 'across rows' option and this is what the groups page looks like now.

More options on main groups page

You have the ability to show the Group Status, Meeting Time, or Venue, or any combination of these for each group on the main group page so that members and visitors can see this information at a glance. Here I have selected all three options, updated and viewed my page, and my page now looks like this. My groups are listed by category but could be listed by meeting day or by venue.

Groups listed by category

General

Art History
Status: Active
Venue: Metropole Hotel
on Monday evenings

History

Military History
Status: Active
Venue: Member's Home
Meets occasionally. Please contact group leader for information.

Natural History

Earth Sciences
Status: Active
Venue: Sports Centre
on Wednesday afternoons

Landscape History
Status: Active
Venue: Sports Centre
on Wednesday mornings
Meets occaionally

Science and Technology

Computer
Status: Active
Venue: YorkOne
Fortnightly on Monday afternoons

Photography
Status: Active
Venue: YorkOne
Monthly on Thursday mornings
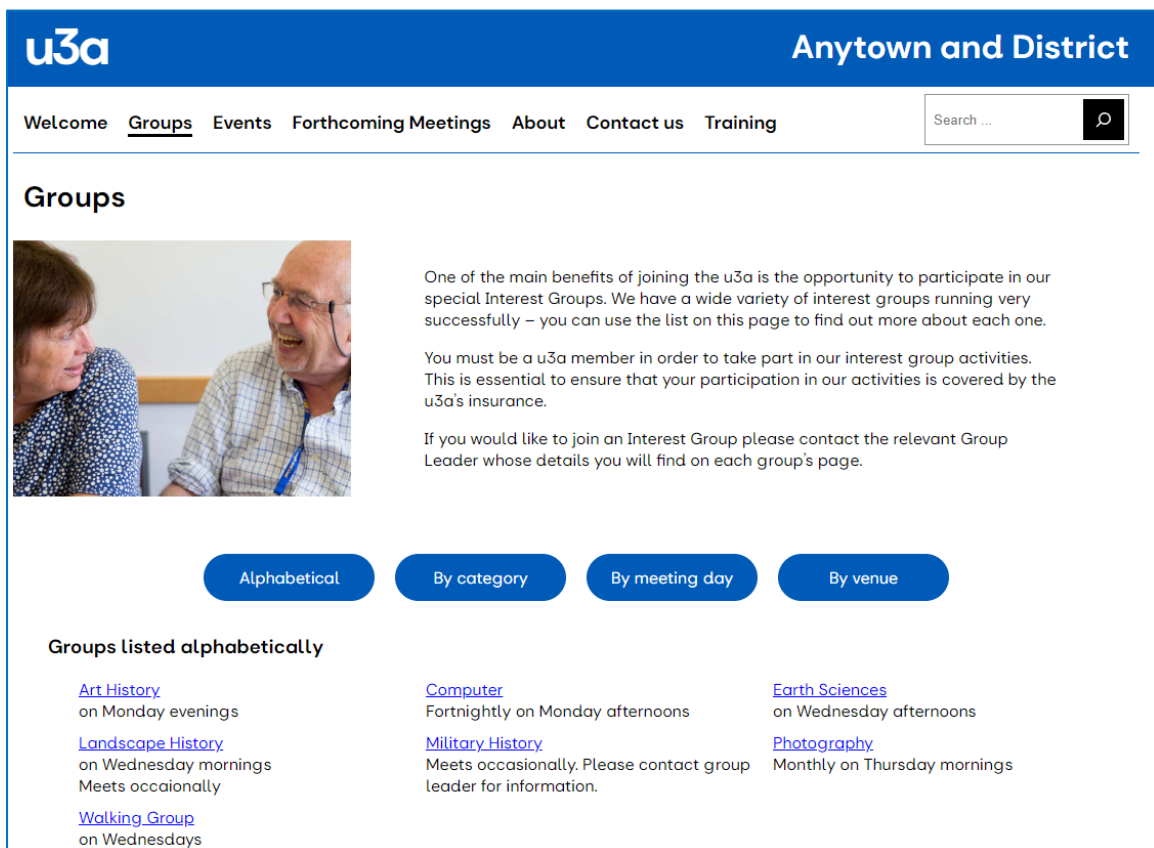
Walking

Walking Group
Status: Active
on Wednesdays
Various times, usually once a month

4b Events display options

During 2024 some additional Events and Groups display capabilities were released to provide more flexibility in the way events data is displayed but also to allow more variation in the page design. The video referenced at the start of this section covers these things.

With the new features you can show previous or future events in ascending or descending order. You can display events by category, show a specified number of events or events over a specific number of days. You can turn on and turn off the display of group events from this page instead of having to go to u3a Settings. You have more layout choices. Adding a featured image you can show an image alongside the text of your event. You can add a colour to the background grid of each event. When setting up an event you can choose the end time as well as the start time.

u3a events list block options

Click on the placeholder to bring up the pop-up toolbar below and the icon far left on the toolbar is the u3a events list.

Select that and you will bring up the corresponding editing panel seen here.
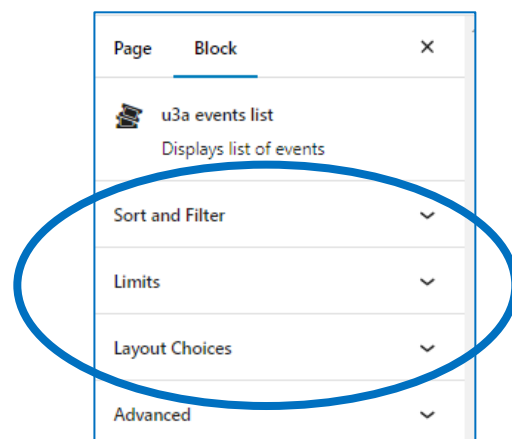
Select the u3a events list block (the placeholder) as seen here.

The new features are here. You can see the Sort and Filter, Limits, and Layout Choices menus within the blue oval.

Sort and Filter

When you select the Sort and Filter drop-down menu you see three options. You can choose to display only future events or only past events and they can be displayed in ascending or descending date order.

Here I have selected future events in descending order as an example and you can see that the list begins with the event furthest away rather than the nearest.
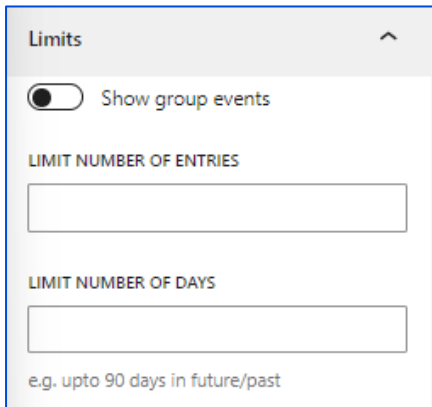
Forthcoming events

21st July 2025 Other	**Anniversary Celebrations** Celebrating 25 years of our u3a. More details will be available nearer the time. The Committee welcomes suggestions for suitable activities. Please contact with your ideas.
31st January 2025 10:30 am Meeting	**January Lecture: Introduction to Permaculture** "Everything you wanted to know about Permaculture but never dared to ask." Chris Evans is a permaculture designer and trainer from Applewood Permaculture Centre in North Herefordshire. In his illustrated […] Venue: Metropole Hotel
11th December 2024 9:30 am Outing (Group: Computer)	**Museum visit** We will be visiting the local computer museum to see their exhibits.
9th December 2024 10:30 am Meeting	**December Lecture: DNA Fingerprinting** Members will remember Rhian's talk on "The King's DNA" where she described how DNA analysis was used to confirm that a skeleton uncovered in Leicester was indeed that of Richard […] Venue: Metropole Hotel
20th November 2024 10:30 am Meeting	**November Lecture: The Hereford Hoard** The Herefordshire Hoard was discovered in 2015 by two metal detectorists. The hoard was made up of a number of gold artefacts and a quantity of silver coins, (as many […] Venue: Metropole Hotel
20th November 2024 9:30 am Workshop (Group: Art History)	**Workshop** Venue: Metropole Hotel **Booking Required**
15th May 2024 Outing	**Annual Bluebell Walk** The photography group and the art group will be organising other events to conincide with the walk for those that feel inspired to paint or photograph the bluebells. Contact the […]

If I now select the All categories drop-down menu and choose only Meetings then the display will reduce to Meetings only and here is the result.

Forthcoming events

31st January 2025 10:30 am Meeting	**January Lecture: Introduction to Permaculture** "Everything you wanted to know about Permaculture but never dared to ask." Chris Evans is a permaculture designer and trainer from Applewood Permaculture Centre in North Herefordshire. In his illustrated [...] Venue: Metropole Hotel
9th December 2024 10:30 am Meeting	**December Lecture: DNA Fingerprinting** Members will remember Rhian's talk on "The King's DNA" where she described how DNA analysis was used to confirm that a skeleton uncovered in Leicester was indeed that of Richard [...] Venue: Metropole Hotel
20th November 2024 10:30 am Meeting	**November Lecture: The Hereford Hoard** The Herefordshire Hoard was discovered in 2015 by two metal detectorists. The hoard was made up of a number of gold artefacts and a quantity of silver coins, (as many [...] Venue: Metropole Hotel

Limits

If we return to the Events page and select the placeholder again, we get the editing panel as seen before.

This time I select the Limits drop-down menu. You can see that I now have a toggle choice as well as two other display choices.

Since SiteWorks was launched we have been able to choose whether to show events for all members such as the monthly meeting information or if we want to show all of the group events as well. To date we have done this via a menu in u3a Settings but now we can simply toggle on and off in this limits box.

If I have a lot of events, I might want to limit the number of them that are displayed at any one time. This Limits menu lets me choose the number of events I want to display at any one time or how many days I want to show.

Layout Choices

The final new display option in Events is Layout Choices as seen here.

The simple list option is what we have had since launch. The drop-down menu offers a grid view with a featured image and provides a much more interesting look.
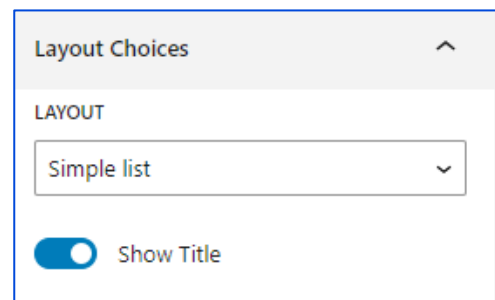
The default setting for this block is the 'Forthcoming Events' title but this is not always the most approriate when displaying, say, past events. The title can now be toggled on and off and a customised heading added.

If I select Grid with featured image I get two more settings to choose from. If I toggle on the crop images to fit option then the image associated with that event with be resized automatically.

I also have the ability to colourise the background of the event text from the usual palette of colours.
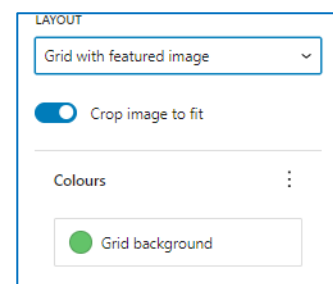
If I choose to enable image cropping and choose a pale yellow background instead of the green shown in the menu on the demo example then this is the result. Note that you need to add a featured image when creating the event if you wish to display one. In the example below the first event, Anniversary Celebrations, doesn't have a featured image but the three following events do.

If I don't want to have the default ' 'Forthcoming Events' title then I can toggle off the Show title button and create my own customised title.

In this example I have used a large text heading block with bold red text but I could have used a cover block with a solid colour background or a photo of my choice.

Layout Choices ⌃

LAYOUT

Grid with featured image ⌄

◉ Show Title

◉ Crop image to fit

Colours ⋮

○ Grid background

Planned Events and Activities

November Lecture: The Hereford Hoard
20th November 2024
10:30 am
The Herefordshire Hoard was discovered in 2015 by two metal detectorists. The hoard was made up of a number of gold artefacts and a quantity of silver coins, (as many [...]
Venue: Metropole Hotel

December Lecture: DNA Fingerprinting
18th December 2024
10:30 am
Members will remember Rhian's talk on 'The King's DNA' where she described how DNA analysis was used to confirm that a skeleton uncovered in Leicester was indeed that of Richard [...]
Venue: Metropole Hotel

January Lecture: Introduction to Permaculture
31st January 2025
10:30 am
"Everything you wanted to know about Permaculture but never dared to ask." Chris Evans is a permaculture designer and trainer from Applewood Permaculture Centre in North Herefordshire. In his illustrated [...]
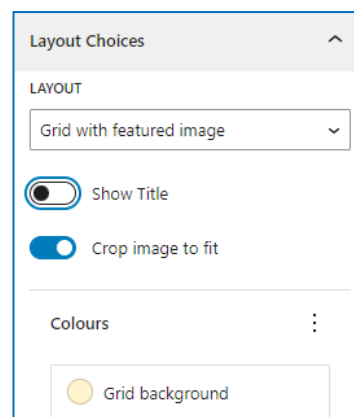Venue: Metropole Hotel

Anniversary Celebrations
21st July 2025
Celebrating 25 years of our u3a. More details will be available nearer the time. The Committee welcomes suggestions for suitable activities. Please contact with your ideas.

Summary of Site-wide editing

In this section we covered the additional groups and events display options that you can set as a style for your entire site and you had the option to view a video about these things as well.

Section 5 – Advanced Applications

In this section you will find some additional editing applications that are more suitable for Administrator's than authors although, depending on your site set-up, you might want your Editor(s) to be able to do these things as well.

5a Links and Embedded files

There are two types of links that you might want to use on your site. One is a website address that a member must click on to view the content. This takes the member to a different website and he/she needs to navigate back to the u3a site after viewing it. We might use this option to link to information about a local landmark or a forthcoming event.
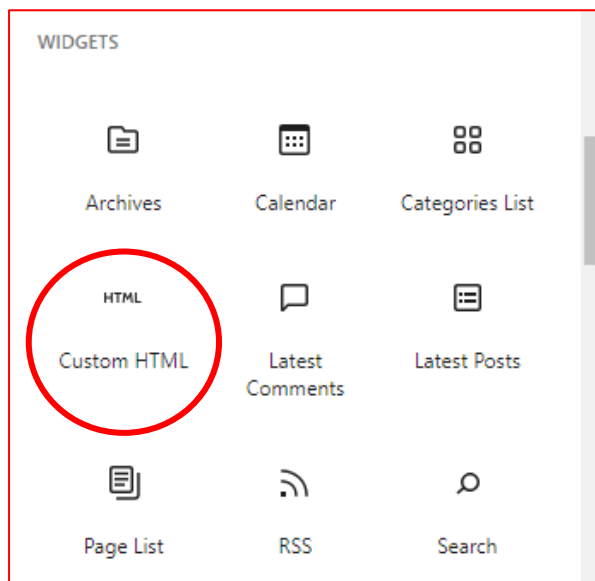
Another link is an embedded link and this displays the content directly on the page of our u3a site.

As you might have seen as you 'browse all' when creating a new block, there are a great many block styles. You might have noticed one called 'Custom HTML. You can see it circled in red.

This will be of particular interest to any Web Manager who wishes to use an embedded Google calendar.

(Note that this works with the shortcode block as well.).

It should be stressed that this is not what the Custom HTML or shortcode block are designed for but it does work and is a solution for sites that need this until a more permanent solution is released. If you want to embed your Google calendar then go to the calendar settings and find the embed code in the Integrate Calendar section. You can see an example of this in the graphic here.
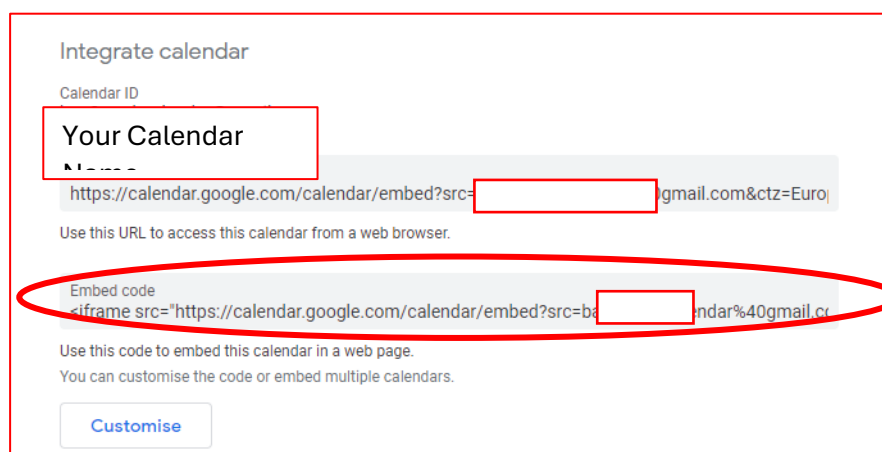
Select the code, copy it, and paste it into the HTML block box as shown here.


```
<iframe src="https://calendar.google.com/calendar/embed?src=bau3awebcalendar%40gmail.com&ctz=Europe%2FLondon"
style="border: 0" width="800" height="600" frameborder="0" scrolling="no"></iframe>
```
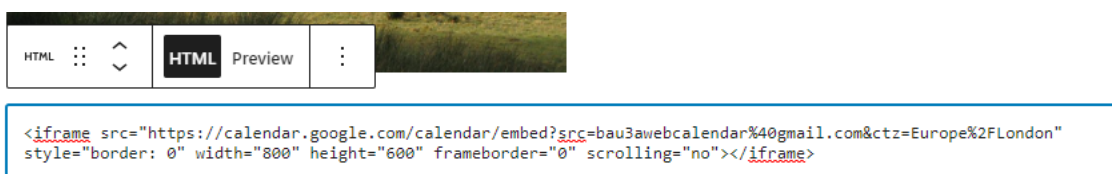
Save your changes and you will have your calendar displaying on your chosen page.

The calendar really needs a whole page so it would be a good idea to create a new page for it and possibly even a new button but that's your decision related to how you design your website.

This is what it looks like on SiteWorks as a whole desktop screen page.
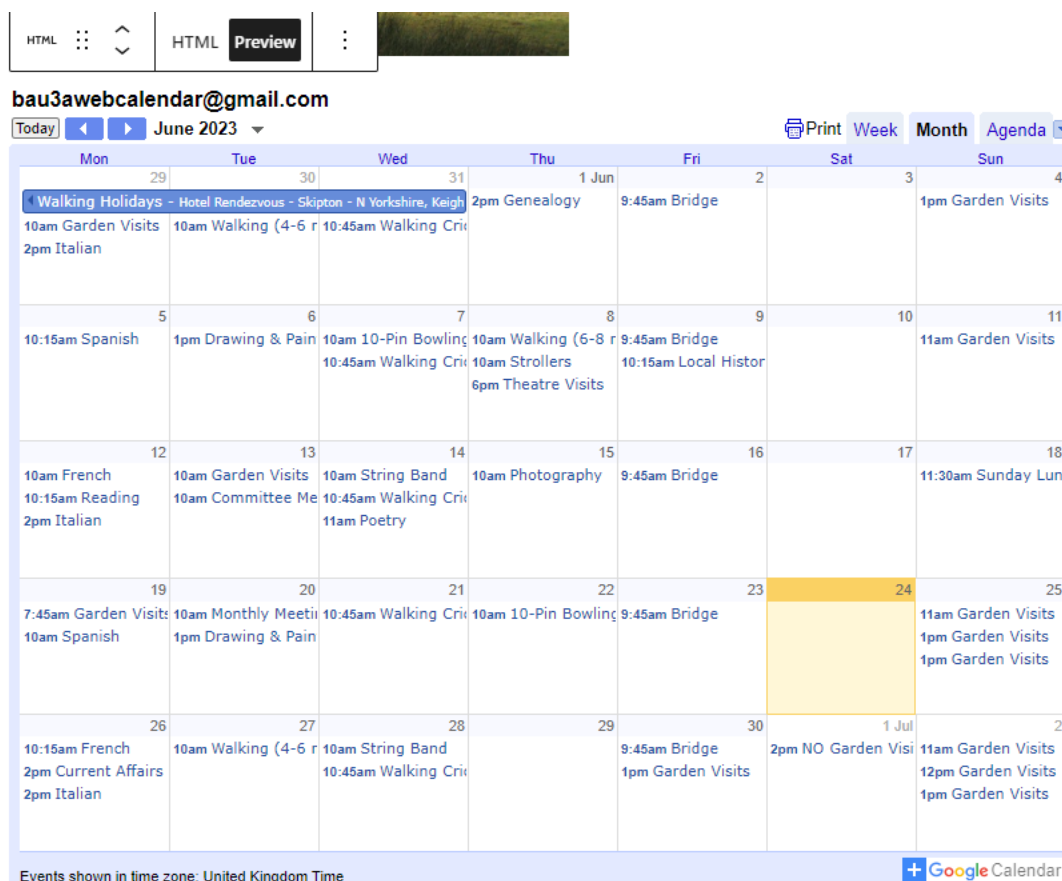
Below is what the calendar looks like on a phone screen in portrait and landscape mode on a SiteWorks site.
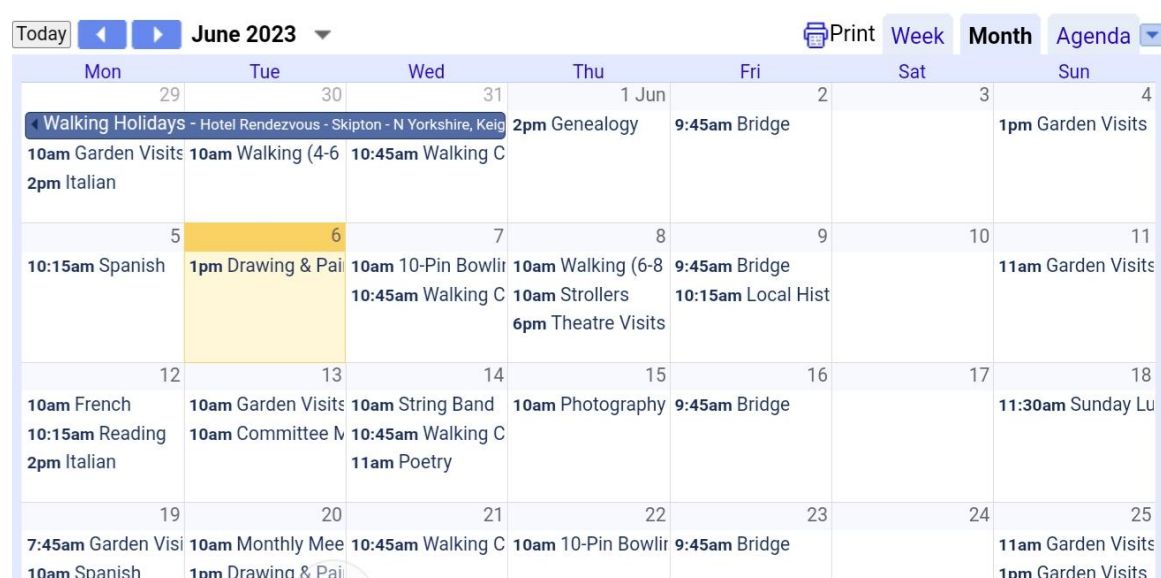
This is a good example to demonstrate the support/no support situation. The HTML and shortcode blocks are standard WordPress blocks that are available within u3a SiteWorks and as it is standard WordPress it is supported. When you embed something like a Google calendar you are embedding an external, 3rd party object. The object itself is nothing at all to do with u3a and, as such, it is not supported. If you have difficulty, say, with the way the calendar displays on your website then it is a Google issue and not a u3a issue.

Note that if you embed content from another website, you have no control over what cookies that site issues. Google Calendar is deemed safe but you should check each instance carefully before an embed is used.

5b Password Protection

Websites are public and not the place to publish or even store sensitive personal or u3a information but perhaps there are times when you want to give members access to information or media that you don't want the world at large to see. This could be an area for committee documents, more personal items for members, or group leader data for instance.

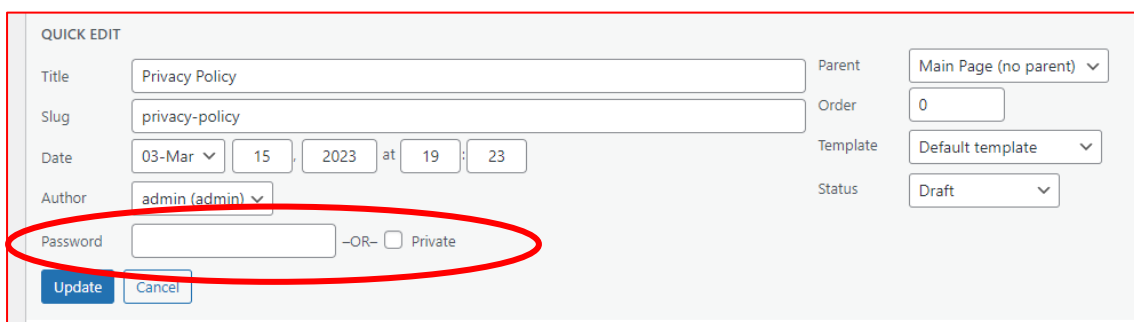### Password protect a page

To password protect an individual page you need to navigate to the page you want to protect. This needs to be done via the Dashboard. Go to All Pages and select the Quick Edit option on that page.

Towards the bottom of the form you can see Password or Private where the red oval is. If you wish to password protect this page then you (or the author) types a password in the box and this has to be entered in future whenever someone tries to access the page. The other option is to check the Private box if you don't want anyone to see the page at all.

Password protecting a page in this way is only a deterrent. A determined hacker would no doubt be able to access the page. The security of the information also depends on where it is stored.

One scenario could be to upload documents into the Media Library and then provide links to them on your password protected page. In this case the documents are not protected as anyone with editing rights has access to the library. This rather defeats the objective of password protecting the page.

Another scenario is to store the documents on an external server and provide links to them on your password protected page. In this case the person accessing the document would need to know the password for the page. This is more secure than the Media Library.

Another scenario is to store the documents on an external server and password protect each of them individually before providing links to them on either a password protected page or a non-protected page. On a protected page the person accessing them would have to know the password to access the page and then the passwords to each of the documents. This is the most secure way to protect the documents but it is a lot of work to create this level of secure

access and not very easy for our members, particularly those where memory can be an age-related issue, to be able to access the documents. One has to question what kind of documents are being shared on a website and why.

Perhaps on our Groups page we have a link to another page for our Group Leaders (GLs) that we want them to be able to access but not the membership at large and certainly not visitors. Perhaps GLs want a place to share venue or coach costs and facilities, banking and invoice payment processes, and have a place to store forms such as Accident Report forms. Depending on the information it could be appropriate to password protect the Group Leaders page.

Password protection is not just about securing information. Editors and authors using u3a sites should be made aware of the password protect limitations and encouraged to consider what information they wish to protect and why.

5c Setting up Posts (blogs)

See the Editing Guide for creating and publishing a post/blog in four steps: title, date, category, and content. This makes it very easy for authors to add blogs to their group pages. The template for the blog needs to be set up first and this is not seen as something for authors but for Administrators and maybe Editors to do. A template provides the layout rules and a category links the blog to the correct group page.

Posts use a block called a Query Loop that in the simplest form is the old computing action of IF (this occurs) THEN (do this).

Let's suppose that the Walking group want to share their walk details and photos as a one-off. You could create a page containing all of the information plus a gallery or Gutenslider of the photos then add a brief description to your group page with a link to this new Walking blog page and job done.

If the Walking group wants to share their walk details and photos on a regular basis then this is where setting it up as a Post rather than a page is worthwhile. Once the template has been set up then every time another Post (blog) is added to that group it automatically follows the pre-set rules and appears on the Group page with no further action needed.

There are two parts to setting up a post.

1. You need a category that is the same for your post and your group so that SiteWorks knows where to put it (IF/THEN).

2. You need the template that provides the rules around how to display the posts on the group page (IF/THEN).

Category

Every group that is going to use Posts needs to be given a unique category and every Post also needs to have the same category so that the right Post appears on the right page. This is the IF/THEN principle.

Categories are not difficult and can be anything you choose. What is important is that it is something that you recognise but also that your Group Leaders will recognise for when they write their own blogs. The easiest way to do this is to use your group names or a variation on them. Examples are: History group becomes History, Science/Engineering/Technology group becomes SET, the Long Walking group becomes LongWalk, and so on. These are only examples. You choose category names that mean something to you and to your u3a.

You can set categories in advance or you can add them dynamically. If you are just starting out then I suggest you create the category in advance as it is one less thing to think about as you create your first post and template. If you have authors writing their blogs then you certainly need to do this in advance.

Navigate to the Dashboard to the Posts section and select Posts then you get these options.
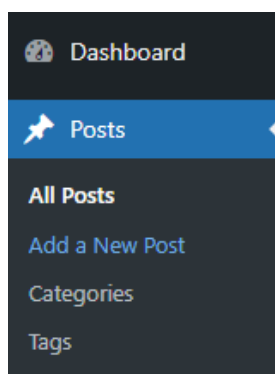
Select Categories. The Walking group want to be able to add blogs with photos after their monthly walk so we need a new Category.

Select add a new category (Walking) and I have added a description to remind myself what it is for, as seen here. The latter is optional. I don't need to add the slug. This URL will be added automatically by SiteWorks.

I click the Add New Category button and the category is added. I can create as many categories as I want to. When I view the category list I can see that a category called Walking has been added.

Note that the Post Category is to provide the link between the Post and the page on which it is to appear. The Group Category is different and describes a group of Groups for display purposes on the main Group page.

Set up Sample Blog

You need a sample blog to check that you are setting up the query loop correctly so if you haven't already got one you need to set one up now. In Posts Quick Reference of the Editing Guide this graphic reminds the author which sections to complete.

Create a new post if necessary or retrieve the sample you have already saved. On my real site have created and saved an uncategorised post sample in my Post list as below with 'Loren Ipsum' and three random photos. I keep it so that I can use it again when I want to set up another blog as I can re-use it and this saves me time and effort.

Return to your post/blog set up

Bottom right, in the category section, the author selects the category to link the blog to the Walking page. When the blog is published it will appear on the Walking page and will display according to the template/query loop parameters. Use the sample you have created and select the category for the group that you are setting this up for.

Note that for the purpose of this guide I have already created a blog for this group but until now did not have a category for it. I returned to that blog, clicked into the title to be in page edit mode, scrolled to the bottom of the editing panel and selected 'Walking'. The link has now been made but I still need to set up the query loop.

The next step is to create the template with the display rules but, as with the category, I only have to do this once. All future posts/blogs with the category Walking will follow those same template rules.

Query loop/Post template

I now navigate to the Walking group where I want my blog/post to appear. Here is the Walking Group page.

The blog(s) are going to appear below the group page and events information. I could just add them as a list but the page would look so much nicer with a heading for the blogs (Recent Walks for example). In this example I have used a cover block and added a countryside photo to complement the blog contents. How to add and format a cover block is covered at the end of this sub-section.

I want the blogs to appear directly under this new heading so now I need to make the link from this page to the Posts that I want to display. Remember IF/THEN? This is where the magic happens.

I insert a Query Loop block immediately below the heading and get this screen.
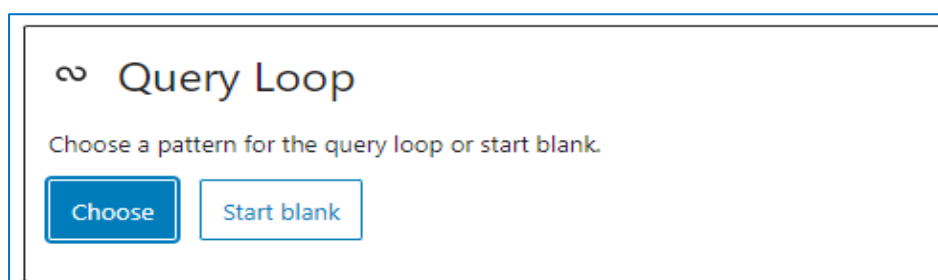
I shall start with a blank pattern and then select Title, Date, and Excerpt as my layout option. This is going to give me a template of what my Post layouts will look like on this page.
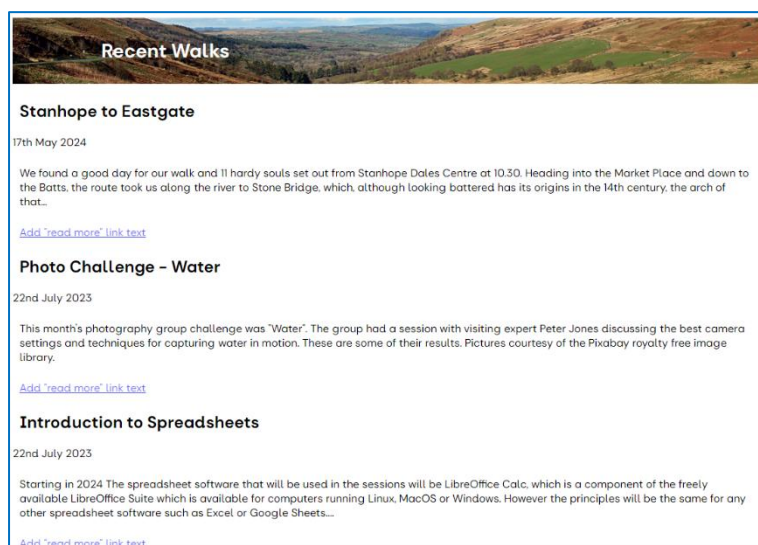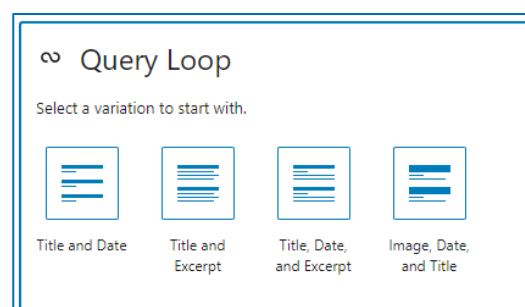
Tip: If there are already other Posts on my website then when I select Title, Date, and Excerpt then I could have a problem. The problem is that all Posts appear including the ones for the photography group and the computer group in the example here. I need to refine this so that only the Walking category blogs appear.
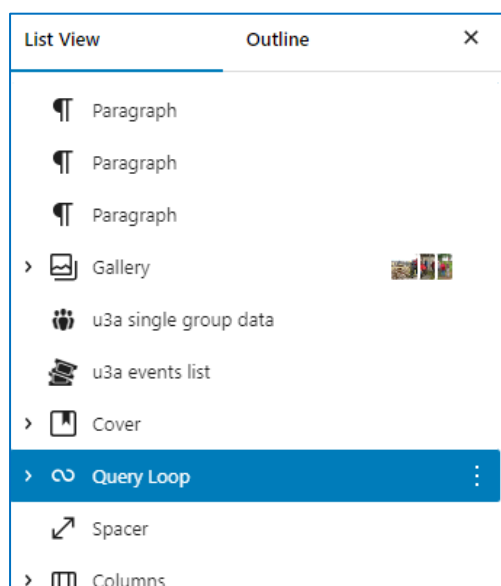
It's difficult to find and select the Query Loop block with a pointing device so the easiest thing to do is to use the hamburger and select it from there.

This will bring up the editing panel for the Query Loop.
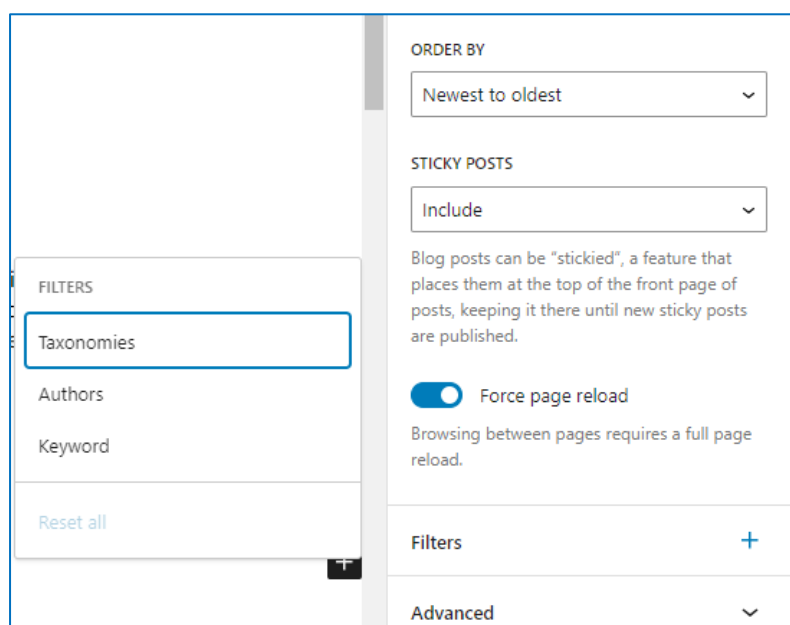
I now scroll down to almost the bottom of the editing panel and click on Filters.

A pop-up menu appears.

I would expect to see the word 'Category' but instead I see 'Taxonomies'. This is what I need to select next.

Note: The' Authors' Filter is disabled in SiteWorks as a security measure.

Select that and now I see Categories. I start typing Walking in the blank box but only get as far as 'wa' when the Walking category pops up. I select that.
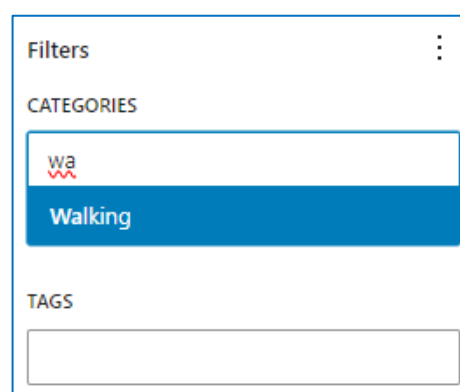
Immediately the blogs/posts on the page reduce so that only the Walking Post is displayed as seen here.
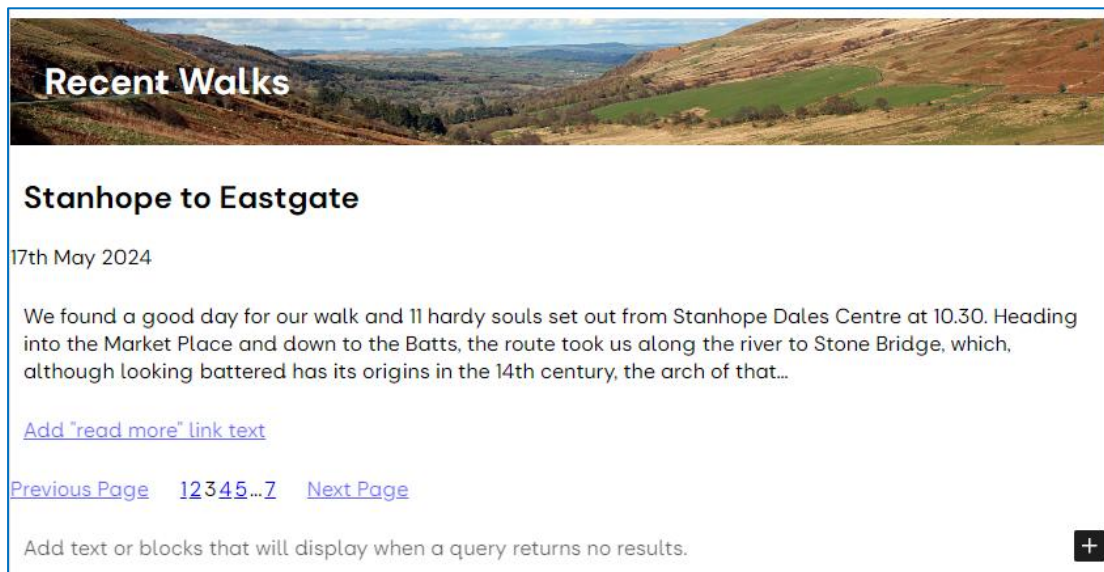
Success! Walking Posts are now appearing on the Walking Group page. The title, date, and an excerpt of the blog are now on display just as was set up in the Query Loop.

It looks good but I need to guide the reader to the rest of it so they can read the whole thing and see the photos. I can do this in two ways.

I can add a 'Read More' block at the end of the text excerpt which is a clickable link to the Post but an easy way is to make the title a clickable link. I could, of course, do both. To make a clickable link I use the hamburger feature again and when I click the arrow alongside Query Loop I can see a breakdown of how this query loop is constructed. Clicking on Title the corresponding item is highlighted so I can double-check I am working on the correct section. At the same time the editing panel for Title appears on the right. I then toggle on the Make title a link button and immediately my title becomes a hyperlink as you can see. Once published all the reader needs to do is click on the link.
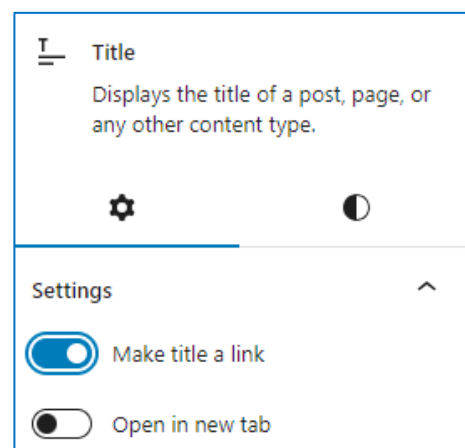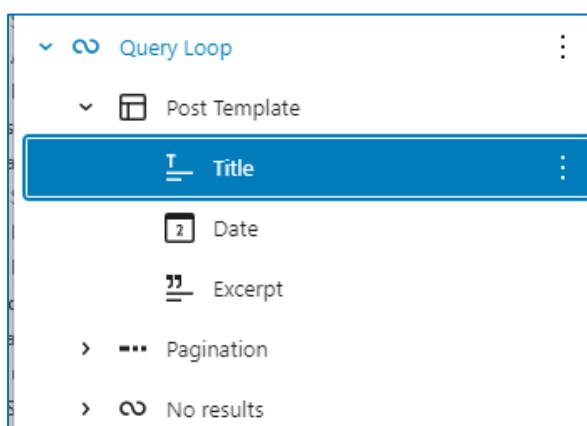
Here is the published post/blog except with hyperlink title.

Stanhope to Eastgate

17th May 2024

We found a good day for our walk and 11 hardy souls set out from Stanhope Dales Centre at 10.30. Heading into the Market Place and down to the Batts, the route took us along the river to Stone Bridge, which, although looking battered has its origins in the 14th century, the arch of that...

Add "read more" link text

There could be an occasion in the future when there are no current blogs to show . IF this occurs THEN what happens? Look at the structure of the Query Loop again and at the bottom you can see another query loop symbol for No results. Click on that symbol and the related item is highlighted on the screen. Add your message. I have added this one. Note that this will only ever be seen in the event that there is nothing to display.

There are no blogs for the Walking group at the moment. Please come back another time.

Other query loop block applications can be found in the **User Guide**[9] on the SiteWorks website.

Once you know the blog is displaying correctly then navigate back to the Admin Sample post and change the category to uncategorised. Return to the group for which you have just set up the template and you should now see the 'no new blogs today' message.

Subsequent Posts

Additional blogs/posts are so easy. Use the Quick Reference in the Editing Guide and they will follow the formatting rules that have just been set up.

Cover block

We haven't covered cover blocks elsewhere in these guides. Select and insert the Cover block in the same way as you insert any block. n.b. You will probably have to use the search block to find it. Here it is and I can choose a solid background colour, media from the library, or upload new media.

Cover

Drag and drop onto this block, upload, or select existing media from your library.

Upload   Media Library   Use featured image

---
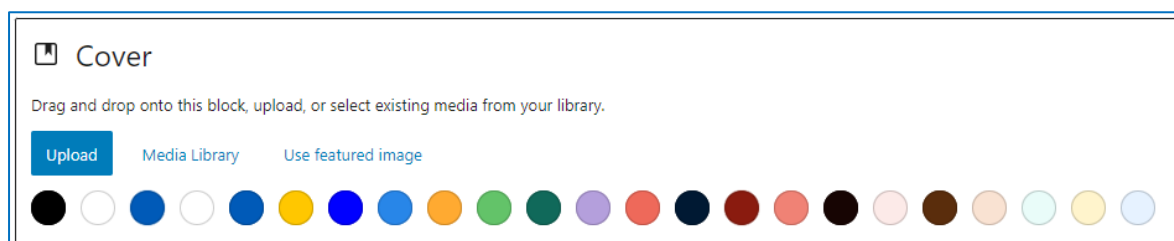
[9] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

Here is the photo that that I have chosen but it looks very dull.
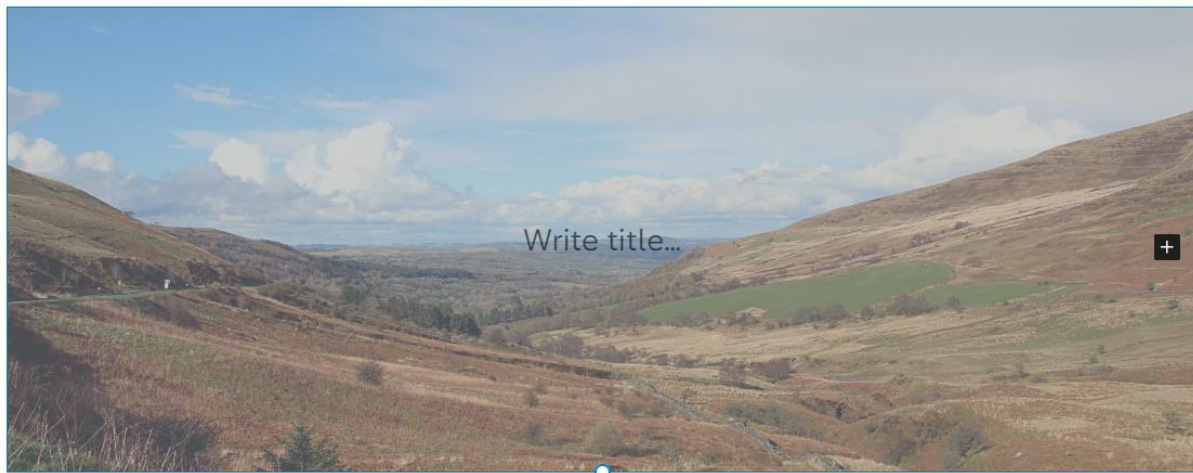
When I navigate to the settings for the block I see that the default display opacity is 50%. I change that to zero and the photo immediately brightens as though the sun came out.
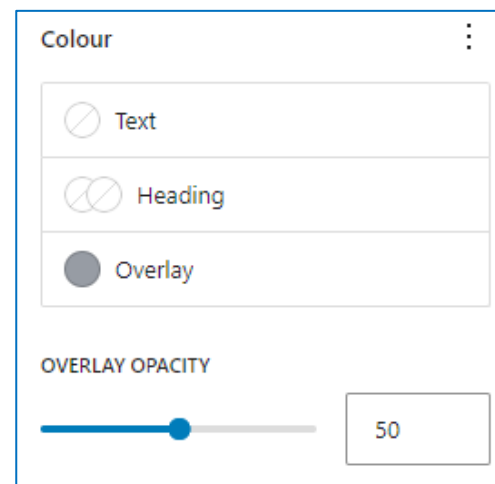
The photo spans the width of the page but I don't really want it so deep. Using the handle on the bottom of the photo I can drag it upwards until I have a photo size that I like.

Selecting the block gives me access to the layout in the editing panel where I can adjust the focal point of my media to choose which part of the photo I want to display. (See media in the Editing Guide)

I added a heading for the blog section, aligned it left, and made it bold white to make it easy to read.

My Walking page now looks like this.

Summary of Advanced Applications

In this section we covered adding links to a page via buttons, how to embed a linked item such as a Google calendar on our website, how to password protect a page and why it is not always the right thing to do, and how to set up the categories and templates (query loops) for blogs/posts.

Section 6 – SiteWorks Settings & Admin tasks

The SiteWorks product contains all of the features and functions that most u3as will need. If your u3a is using standard u3a SiteWorks then the vast majority of administration tasks are 'set-and-forget'. Taking over an existing site it is probably a good idea to read this section and check the settings so you know what they are, where they are, and how to modify them in the future if necessary. One task you will most likely be doing from time-to-time is adding or changing Contacts whereas deciding if your u3a calls Group Leaders convenors or leaders is most likely a one-off decision so a one-off setting.

If you are the Web Manager with a Starter site then you will be undertaking all of these tasks during your initial set-up but many are a one-off task only.

Editors and Authors do not need this section.

If your site has, or intends to customise u3a SiteWorks by adding, more 3rd party plugins then you are directed to read the **Non-u3a Plugins Warning** and the recommended use of **LocalWP**.

u3a at Trust level will provide the necessary technical support that includes server-hosting of the sites with site management including ongoing u3a SiteWorks development and support. Once your SiteWorks site is up and running all standard software updates take place automatically and are deployed from a central point. **Backups** are also automatic and take place every 24-hour period for 14 days. One copy is kept on site for instant access but the second copy is held off-site for disaster recovery purposes [10].

Settings

This section outlines the u3a settings and the Standard Operating Procedures.

There are three items on the Dashboard menu related to Settings. These are u3a Settings (SiteWorks), Tools (WordPress), and Settings (WordPress).

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[10] You will find more information about security and back-ups on the SiteWorks website and you can access this via Appendix A

6a u3a Settings

Select u3a Settings from the Dashboard and you will get the screen below. As you can see there are four tabs. These settings enable you to set up u3a–related items the way you/your u3a wants to see them as described below.
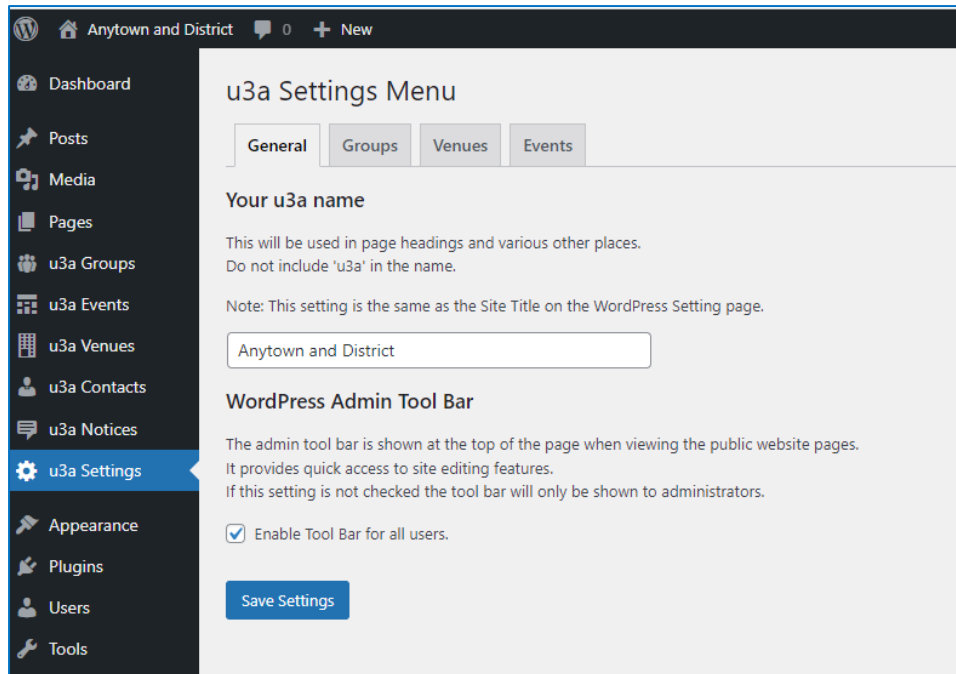
1. The first tab is General and this is where you can amend your u3a website name if necessary. If you are not sure about this setting then please seek help before doing this. It is also where you can set who can see the toolbar at the top of the page. If the box is not checked then only the Administrator can see the toolbar.

2. The second tab is Groups and this gives you control over group settings. You can choose the generic term for the person who heads your groups according to your u3a custom. Some u3as use the word Convenor and some use Leader or another term. You can choose which term is used by your u3a. When describing groups some say faculties and some say categories. You can choose what displays on the group such as people related to roles and cost of activities.   There is a choice for group listings and whether you want the list sorted or not sorted. If you choose, on the Group page, to list your groups alphabetically the system will change the list to category (or faculty) if the list is long. To prevent this you need to set the maximum group list number to a number in excess of the number of groups that you have. 999 is usually enough. This is also the area where you can cloak and uncloak email addresses so that a member or visitor can make email contact to what seems to be a group address. The mail is actually sent to the nominated leader's address but the sender does not see this address.

3. The third tab is venues and enables you to set any optional fields to appear or not. There is an option to hide Event and Group references

4. The fourth tab gives you control over the content of the Events page as well as the date and time display attributes. It enables you to show all Events including Group events and activities or just main Meetings events. Note that this is now a display option within u3a Events as well.

If you change any Settings in this section then please don't forget to save them or they won't take effect. If you make changes on one tab, you must save these settings before switching to a different tab within the u3a Settings panel.

6b Standard Operating Procedures

Before going live you will be directed to the **Standard Operating Procedures** [11] (S.O.P.) that tells us all exactly what we are allowed and not allowed to do. This is graphical and easy to follow as shown below.

It is important that you read these and adhere to the rules. **In practice some** Web Managers either don't read these or choose to ignore them. Some decide to set up their own back-ups but then store them on their server site, for instance. This rather defeats the object as if the site or server goes down then the back-up will be lost. In addition a back-up doubles the amount of space on the server taken by the site and multiple back-ups increase this exponentially. If such back-ups are undertaken they must be stored off site.

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[11] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

6c u3a Contact Form Log

The u3a plugin called u3a Contact Form Log is configured so turning the log on or off is controlled by the site Administrator. It has been developed to be used by a u3a that suspects SPAM attacks.

Enable & Disable

Selecting the u3a Contact Form Log from the Dashboard menu you see the message shown here and can choose to enable it.
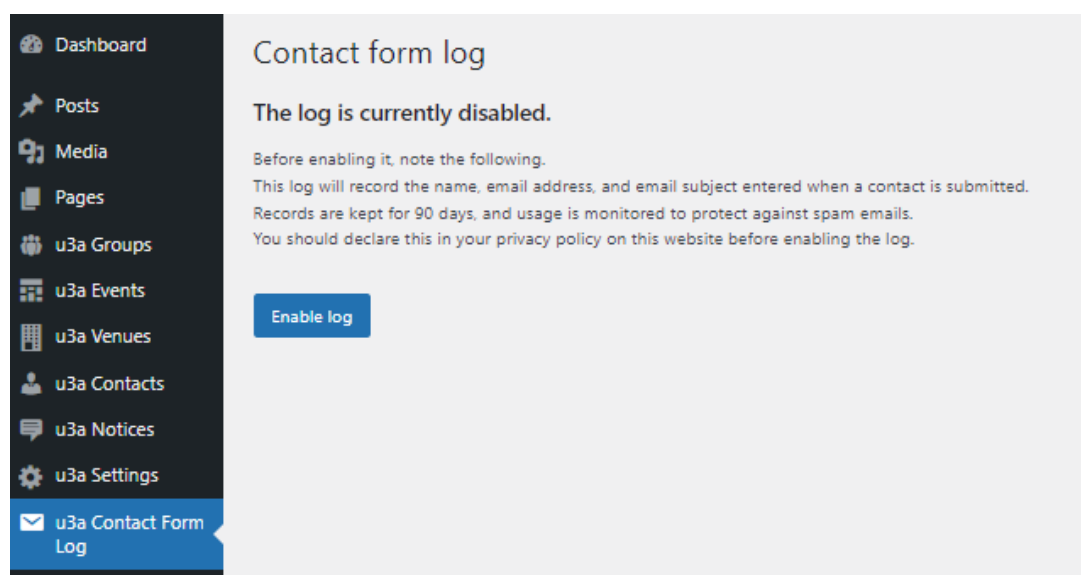
If the log is already enabled then you'll see a different set of menu options. You can disable the log and delete stored data or you can refine the data that is stored by filtering the messages and/or the number of messages.
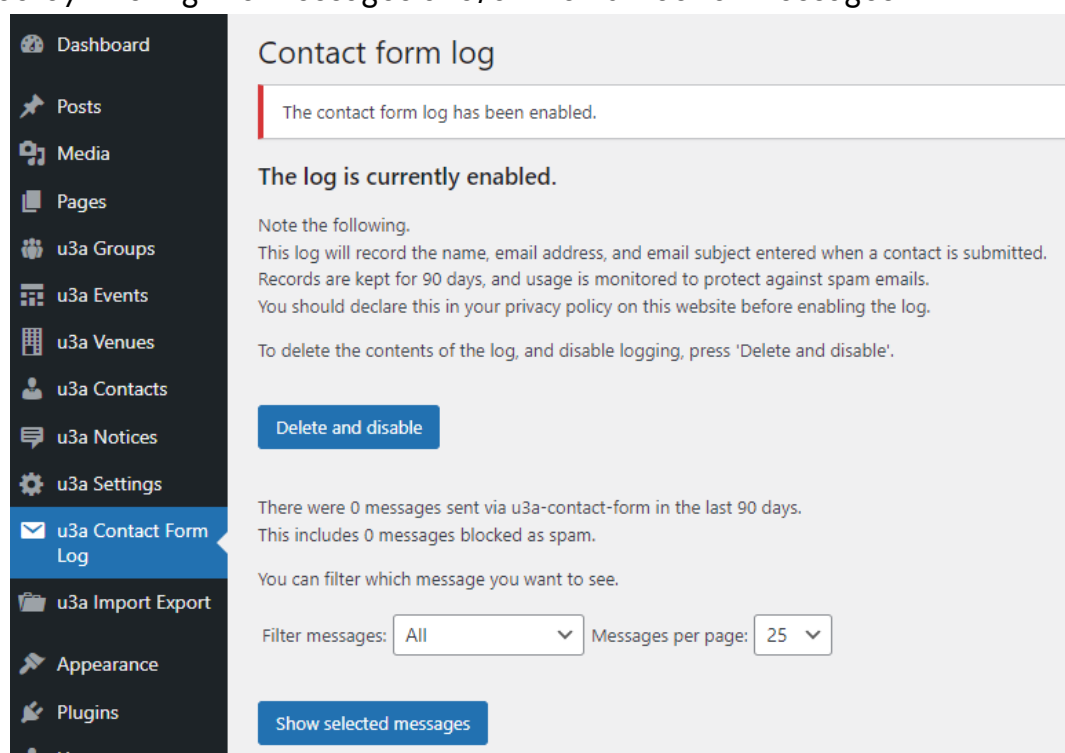
The u3a contact form is set up with a spam trap. A robot will fill in a field that is invisible to a human. The contact form log records all mail sent from contact forms across the site and will pick up such activity if your site is being targeted.

u3a Privacy policy implication

This data is stored for 90 days so if this feature is enabled on your site you will need to make a small change to your u3a Privacy policy to reflect this.

Summary of SiteWorks settings and Admin tasks

In this section we looked at the u3a settings and what can be set or modified, the Standard Operating Procedures that we need to abide by, and the u3a Contact Form Log that can be used if we suspect that our site is being target with SPAM.

Section 7 – WordPress Settings & Admin tasks

We have reviewed most of the items on the Dashboard but there are a few that we still need to look at and they are all Administration functions under control of the site Administrator. Once you have set the settings in the administration sections you might never want or need to change them again but it's always good to know how to do something in case you need it in the future.

7a Settings

These are the WordPress settings you will see on your Dashboard. A Web Manager taking over an existing site will inherit these and there will probably be no reason to touch them again unless one of the u3a technical team asks you to do so. Unless you are technically competent, please do not play around with the settings in this section as you could permanently damage your site.

For a Web Manager with a Starter site the SiteWorks Supporter on the SiteWorks team can work through this section with you if needed
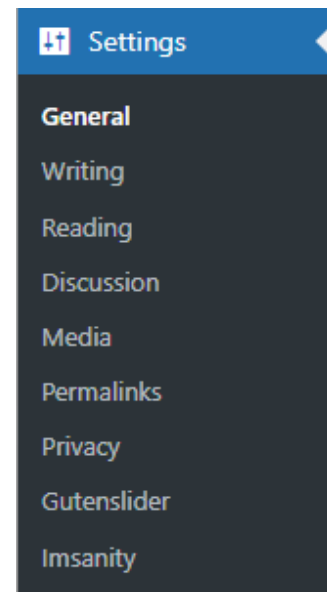
7b Tools

You access the Tools menu from the Dashboard. Here is a list of what they are and what they do. Using these tools is quite advanced so it is recommended that you don't use them unless you know what you are doing. Your SiteWorks Supporter can help you to set these up if you need such help.

The Import and Export sub-menus provide some very basic facilities for moving data between WordPress sites but are unlikely to be relevant to most u3as. They should not be considered as a backup mechanism. When working on 'LocalWP' you can use the export facility provided by 'Local' to create a complete backup of a site you are working on. On live sites, comprehensive daily backup facilities are provided as standard as outlined at the beginning of this section.

The Site Health section can be ignored unless the messages relate to plugins that you have installed and which are not therefore supported by the SiteWorks system administration team. Non plugin, cache related performance improvements should be ignored. When working on 'LocalWP' you should ignore the Site Health section as it is really only relevant on "live" sites.

The Export Personal Data tool and Erase Personal Data tool may help you to comply with some GDPR requests but will not provide a comprehensive solution.

7b Dashboard customisation

When you have logged in, the main SiteWorks Dashboard screen will be displayed. If you are an Administrator, the Dashboard looks something like this although the main screen area can be customised as desired: – the Administrator can use u3a Settings to customise screens for other Users as well.
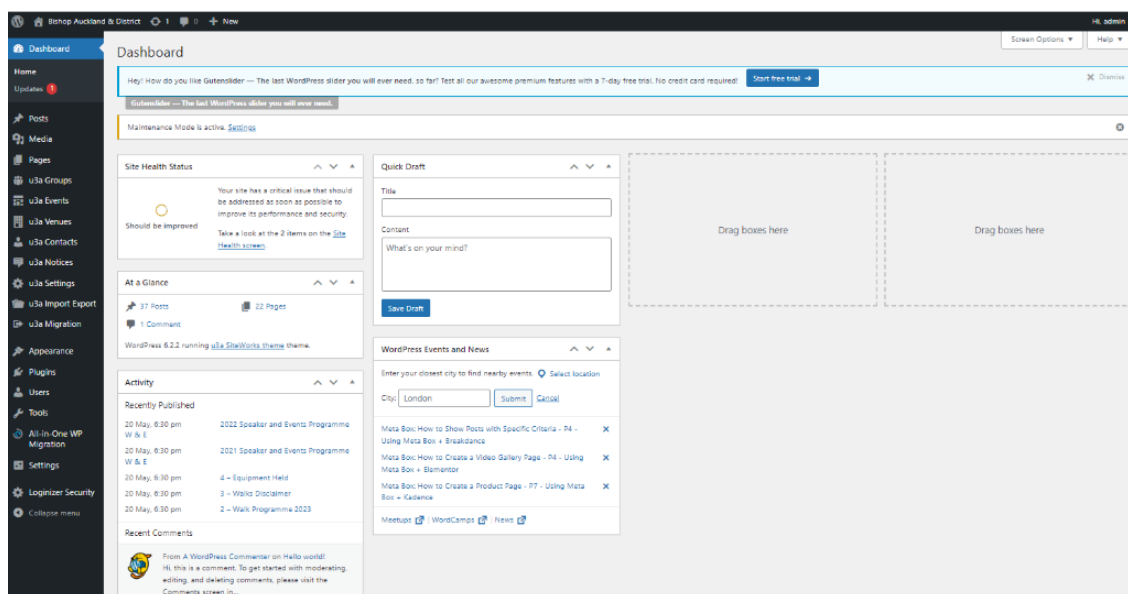
Note that you might occasionally get a promotional message such as that highlighted in blue on this image. You can safely dismiss such messages.

As you saw in the login section of the Editing Guide Authors and Editors have different access rights to that of the site Administrator so if a User logs as an Author or Editor, the Dashboard menus are reduced in line with the role access.

Customising the Dashboard screen

You can work perfectly well with the default screen but some Administrators prefer to customise it. The Screen Options tab can be seen top right on this graphic on the Dashboard home page. Just select any of the options you would like to display on the Dashboard.
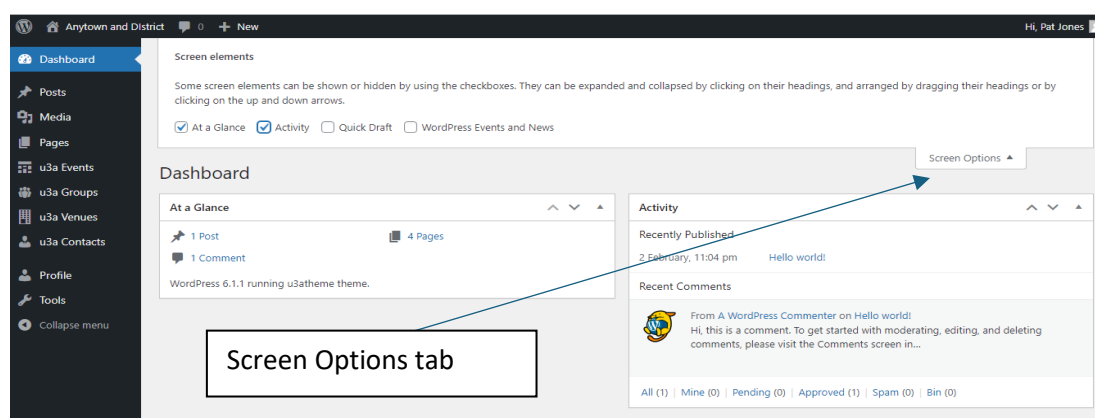
The items displayed in the centre of the screen on the Dashboard may be changed for all Users by selecting that Screen Options tab. This screen has everything selected except the welcome message.

7c Getting WordPress screen help
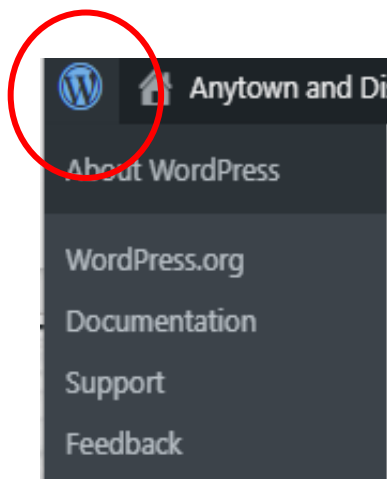
Top left of the Dashboard is a WordPress icon shown here and circled in red. This appears on every screen. If you click on that icon, you get a drop-down menu where you can select additional information.

'About WordPress' gives you a useful summary of what the current version of WordPress gives you as seen in the next screenshot.
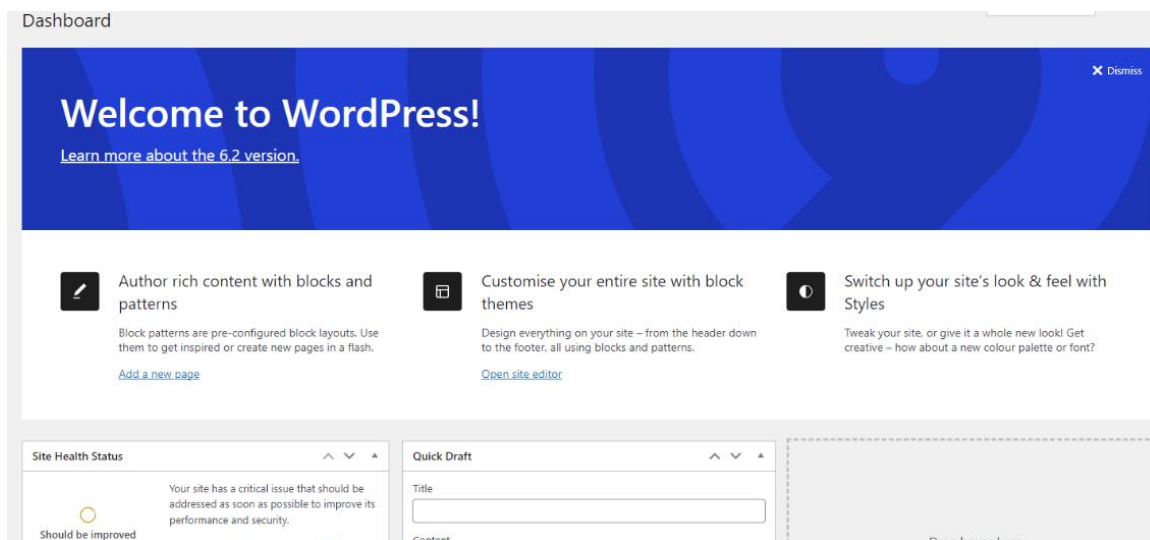
'WordPress.org' takes you to the WordPress website that tells you more about the company and the software concepts.

'Documentation' gives you a WordPress overview but also provides you with searchable help in the Technical and Support Guides.
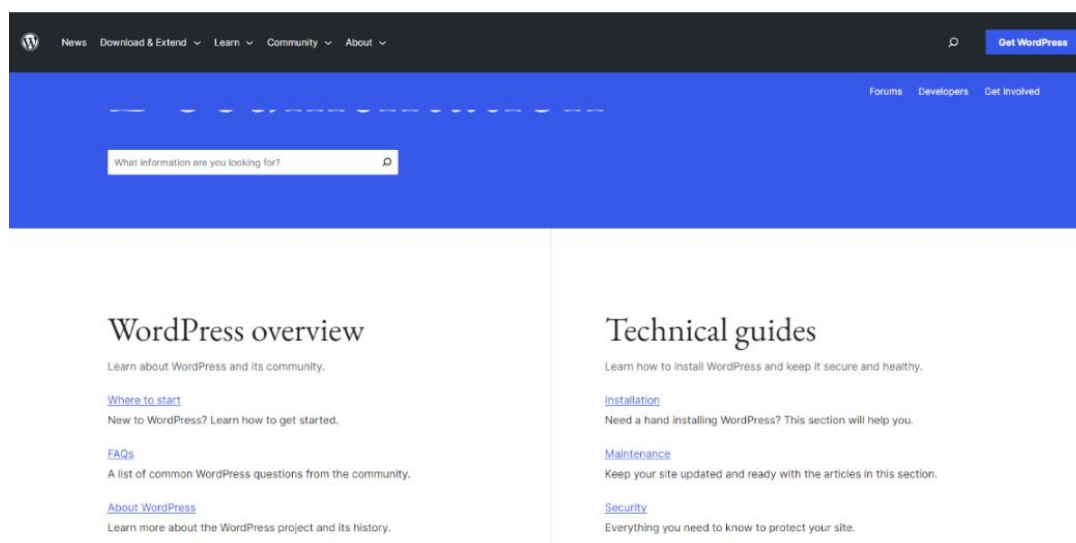
'Feedback' enables you to add requests for support of a WordPress feature in the future but is also a place where you can report issues. Note that this area is for general WordPress feedback and does not come to u3a. This is not a Help Desk. Please see the 'Where to get Help' section later if you want SiteWorks help.

7d Users

The Administrator(s) needs to give others in their u3a access rights as required. These people are Editors or Authors. Note that WordPress has additional User types but SiteWorks restricts us to these three. The other two are Subscribers and Contributors but there are no plans for u3a to use these other two in the short-term.

Summary of User Access Rights

There are three levels of access to assist with site management. Roles are assigned to Users as they are added to the site but they can be modified at any time. The roles are Admin, Editor, and Author. As you can see in the table below each role has different access rights. When naming a group leader on a group page these rights are easy to control at page level.

Role	Add new SiteWorks users	Add /Edit u3a Groups	Add /Edit u3a Contacts	Add /Edit Venues	Add /Edit Posts	Add New pages	Edit Own pages	Edit all pages
Admin	Y	Y	Y	Y	Y	Y	Y	Y
Editor	N	Y	Y	Y	Y	Y	Y	Y
Author	N	Y*	Y*	Y*	Y*	N	Y	N

Role	Add/Edit global events & Pages	Add/Edit All Group Events & Pages	Add/Edit Own Group Events & Pages
Admin	Y	Y	Y
Editor	N	Y	Y
Author	N	N	Y

*Authors may edit only those items that they have either created themselves or have been allocated as Author by an Admin.

Please note that all roles have full access to the Media Library for uploading /inserting images and documents.

Setting up User Access

The Users menu is towards the bottom of the Dashboard menu. This is where you add details of any people who are going to have access to site editing. As the Web Manager this obviously includes yourself as Administrator but details of an additional Administrator or an Editor and any Authors are also created and edited here.

Tip: It is a good idea to set up a second Administrator logon for yourself for emergency use. It is not unknown for an Administrator to lock him/herself out of their site (see **Failed logins**) and having this second login provides a backup and perhaps saves some embarrassment.

As you review the list of Users on your site you will see one for 'SwDevAdmin' and you might notice that you cannot delete or make any changes to it. This is by design as this is the Administrator that enables updates to be applied and backups to be completed as part of your managed site.

Setting Users up is something that needs to be done when a Starter site is being set up, but for most u3a sites this will not be an area that will be worked on very often.

Note that many of the full-page screenshots in this section of the workbook are too small to read comfortably so use the images here to familiarise yourself with the overall look of the page and use your site running in LocalWP or live site to view the detail.

In this demo example clicking on All Users will bring up the page below. In this example only admin and one user have been added so far. If I hover over admin I can see that the only options I have are Edit and View. Hover over Fred and I can Edit/Delete/View or reset his password.
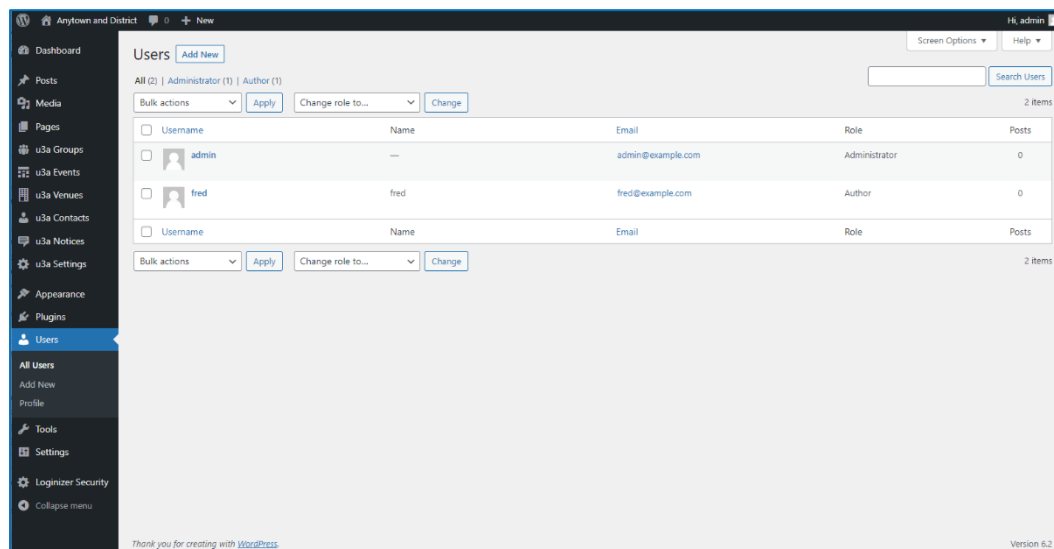
Add a New User

We want to add a new user, perhaps a Group Leader who will edit their own page(s), so we click on Add New and the menu below comes on screen. This is self-explanatory so you would just complete the boxes.

Passwords and logins are discussed in the Editing Guide but this section gives you a little more detail. Set a password for the new user.

WordPress suggests between 6 and 24 characters for Username and Password but SiteWorks experience to date has shown us that some plugins require a strong password. We strongly suggest that all SiteWorks Users adopt strong Usernames and Passwords now to avoid future issues. Your username or password must not include any reference to your u3a, your role, or your personal information.

You can either use the system to generate a password or enter one of your own choosing. You can repeatedly press the 'Generate password' button to produce

new passwords. As detailed in the Editing Guide your SiteWorks your password should consist at least 12 characters with at least one upper case letter, one lower case letter, one number, and one special character and we recommend it is changed every 6 months. Remember that you want that Strong green password to meet the SiteWorks requirements.

You are advised to use what3words to help you to create passwords.
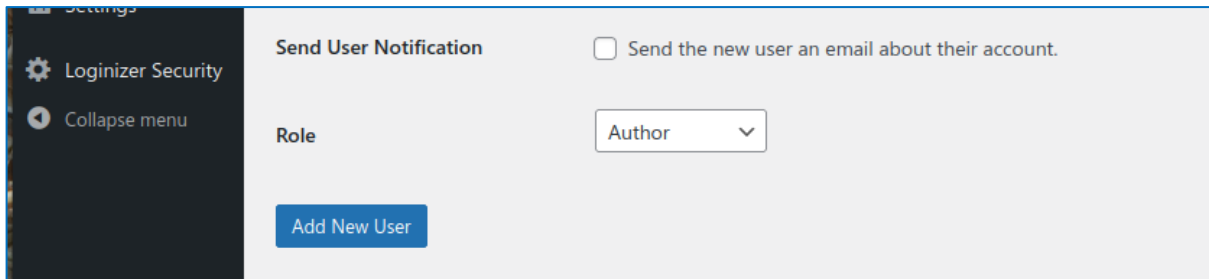
Just a reminder that if you try and create a user with a password that does not conform to requirements, the account will not be created when you try to add the new user. A message will show at the top of the screen as follows:

Reminder to remove the tick from the box labelled "Send the new user an email about their account." Such emails tend to look like junk or phishing emails and are often not delivered successfully. It is more secure to send the new user a personal email and tell them their new account name and password in two separate mails.

Set the appropriate Role and click the 'Add New User' button. The new account is created. It might be a good idea to log out from your account and check that you can log in as the new user to make sure you have recorded the username and password correctly. Return to the All Users screen in Administration mode and your new user will now show on the list.

Please note that it is a WordPress requirement that all Users of the system must have a unique email address.

For your information a Subscriber is just someone who can log in, but with no access to the administration pages. That role would typically be used if you want to restrict access to certain content on the front end of the website to known users. A u3a might consider using that role for their regular members to see more content on the site than the general public. However, it would require support from additional plugins to provide that functionality as it is not a standard WordPress feature.

A Contributor can log in to the administration pages and can create posts but cannot publish them. Like an Author they can also edit content where the content item has been put in their ownership, but they cannot publish such items. I can't see that role being useful to a u3a unless they want to be able to give untrusted members the ability to create content which would not be published until approved by an Editor or Administrator.

Failed logins account lock
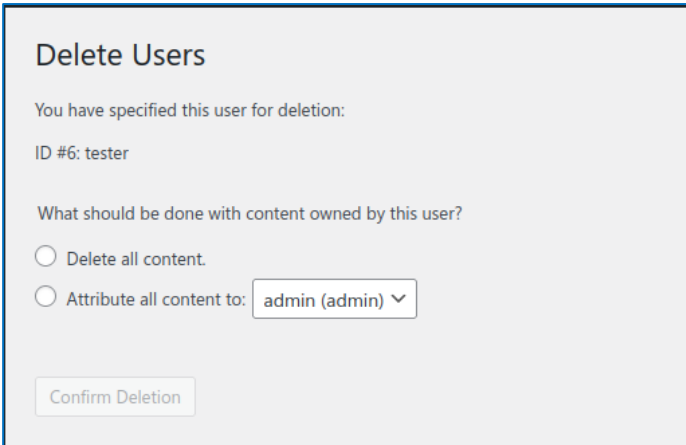
Occasionally a Web Manager reports being unable to log in to his/her site. This happens when someone repeatedly uses the wrong combination of username and password. As a security measure the Loginizer plugin is designed to protect against password guessing bots, so will lock any account after 4 failed login attempts.

The user attempting to log in will not be shown anything that indicates the account has been locked. They will just get the usual login failure message 'Something is wrong with your username or password.' ... so as to give no clues to an attacker. The Loginizer settings will initially lock the account for 15 minutes, after which a correct login will be accepted. However, if a user repeatedly fails to login, the account will get locked for 24 hours.

Delete a User

There could be a time when you need to delete a User for some reason. You do this from Users in the Dashboard and when you choose to delete a User you are given some choices. It is important that you make the right choices.

Here is the screen you will get when you delete a User and you will see that you can delete all content associated with that User or attribute the associated content to another authorised person on site. Take care to think about this before you delete as if you choose to delete all content then you will delete everything that person has written or uploaded as well as any groups, pages, posts, etc. that you have assigned to that User. The only way you can retrieve that content is through the Help Desk[12] via a SysAdmin restore.

Delete Users

You have specified this user for deletion:

ID #6: tester

What should be done with content owned by this user?

○ Delete all content.

○ Attribute all content to: admin (admin) ⌄

Confirm Deletion

7e Quick Edit and access rights

One of the things you can only do from the Dashboard is access 'Quick Edit' that was mentioned earlier. In Quick Edit you can view, bin, edit, and quick edit the item. Navigate to Dashboard > Groups > (any group) and select the Quick Edit option.

You will see the menu below. This shows you the group name plus date and time the group was created and the role of the author. In the example here of a page you can see it was admin but if I click on the arrow, I can see that other options are fred and another User. I can select either person to replace the admin and that person will have the access rights to that page that I have assigned to them.

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[12] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

On the Dashboard Pages, Groups, Events, Venues, Notices, and more also have a Quick Edit option and you can allocate/reallocate content to an alternative user who has appropriate access rights at any time.

> Tip: If you have a change of Group Leader and want to give him/her author rights to existing events and posts (blogs) associated with that group then you need to change the user access of every one of the existing documents.

Summary of WordPress settings and Admin tasks

In this section there was an overview of WordPress settings and tools, Dashboard customisation options and WordPress on-screen help, how to set up and manage SiteWorks Users, and how to allocate author access rights.

Section 8 – Sources for Learning SiteWorks

Web Managers/site Administrators have this SiteWorks Foundation Administrator's Guide and the Editing Guide plus the User Guide for more technical detail if required.

8a Editors and Authors

In due course you will probably be cascading your knowledge and skills related to editing pages on your website to members of your own u3a who maintain their own web pages (authors or editors). These people do not need nearly as much knowledge as the site Administrator and not all authors require the same level of knowledge either.

How you teach your own members to use SiteWorks is, of course, entirely up to you. It's your u3a and your website so your choice. The Editing Guide has been written for everyone who will be editing pages, events, and so on and this will no doubt be used by many Web Managers. If you do decide to use this then please do read the introduction as this includes a guide so that you can direct your authors to the sections most suitable for their needs.

If you want a safe place where you know that little or no damage can be done to the site and want to give your authors the confidence that they are not going to break the site by doing something wrong then please consider using an uncategorised post for each of your trainee users. They can perform all functions there and even publish, log off, return then edit and update and as long as the post remains uncategorised it won't display on your site. There is an outside chance that such a post could be found by some random person searching but any content is likely to be open knowledge so the benefit outweighs the risk.

As you will have seen, the editing guide includes blogs (posts) for authors. Any group leader who wishes to add blogs will need you to set up the **category and query loop** in advance for them and how to do these things is covered in the advanced applications section of this guide.

8b SiteWorks and WordPress 'how–tos'

You will find a **wealth of information** [13] on the SiteWorks website including a series of 'how–tos' that provide step–by–step instructions dealing with one specific point such as how to resize column blocks. This page also provides insight and suggestions relating to various WordPress editing features.

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[13] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

8c Where Can You find More WordPress Learning Material?

On the **Foundation Guide links** [14] page of the u3a SiteWorks website you will find a link to a list of recommended General WordPress Training documents, as shown below.

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[14] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

Section 9 – Where to get Help

The SiteWorks Guides are foundation level documents that covers the basics and the most widely used features and functions of SiteWorks. It covers the majority of things that most Web Managers will require or will find on their sites already. Please use the Table of Contents and the search facility to see if the answer to your question is here.

9a Sources of help

WordPress is feature-rich and no one document can cover everything. If your answer isn't here then please try the **User Guide** on the SiteWorks website where there is far greater technical content than in this workbook.

If you are an Editor or an Author then your next point of call for help is your Web Manager. If he/she cannot answer your question then he/she will escalate it. Please do not contact the Help Desk directly. We are a small team of volunteers with limited resources so please follow this procedure.

As the Web Manager/site Administrator you can access the u3a **Help Desk** [15] from the SiteWorks website where the team will direct your query to the most appropriate person.

You are welcome to attend the regular SiteWorks Drop-In Zoom sessions (See **Newsletter** for details) which has been set up to support Web Managers and Assistants who are new to SiteWorks. The Zoom is on the 1st and 3rd Monday each month at 3pm.

There is a **u3a WordPress Development Forum** [16] that you can join .

The SiteWorks website offers a wealth of information including project background, news and bulletins, resources for Web Managers, FAQs, and more. **https://siteworks.u3a.org.uk/**

WordPress is very widely used around the world and there is a huge amount of contextual information available from WordPress itself as outlined here, from open forums, and even from Google.

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[15] This link takes you to a page on the SiteWorks website where you will find this information. See also Appendix A

[16] As above

Section 10 - Appendices

Appendix A – SiteWorks website links

To make it easier for you to access the Site Works website links that are referenced in this guide, our site Administrator has copied them all onto one page for you. Within this workbook I am referencing the page containing the links rather than the individual links that are scattered over several pages. This should prevent any 'page not found' messages in the future as it is easier to maintain this reference page. The linked items you will find are as follows: -

https://siteworks.u3a.org.uk/foundation-guide-links/

Links for the Administrator's Guide

- User Guide
- LocalWP and the u3a demo file
- Standard Operating Procedures
- u3a Privacy Policy pro-forma
- Go Live Checklist
- SiteWorks 1.1 Group and Events video (Nick)
- Learn WordPress links
- Website Security, Back-ups, etc..

Links for the Editing Guide

- User Guide (same as above)
- SiteWorks Introduction videos
- WordPress Gutenberg – The Ultimate Guide video (Jamie Marsland)
- Help Desk
- WordPress Development Forum
- SiteWorks sites map link

As well as the references above, this site has further useful information including how to update a Web Manager's details (see Start here) , News > Monthly Newsletter Bulletins, FAQs and more.- **https://siteworks.u3a.org.uk/**

Appendix B – LocalWP and the u3a demo file

LocalWP, Demo zip file, and WordPress Updates

Like all major software, WordPress gets updated on a regular basis. This can be anything from a patch to fix a minor issue through an interim release that covers fixes and some new features to a completely new release that combines all patches and interim releases and adds yet more new features. As u3a SiteWorks is WordPress based we'll get any updates automatically.

Before new WordPress updates are formally released, they are available in Beta format and our development team review the features and test them to ensure ongoing compatibility with u3a SiteWorks plug-ins. Thus, when we get the new release via our SiteWorks site we can rest assured that it will not cause us any problems.

When a WordPress or u3a SiteWorks release is significant the SiteWorks Foundation Guides and/or the User Guide will be updated accordingly.

LocalWP is a WordPress development (and simulation) software that enables developers or testers to create or modify pages in a browser environment but also to test new software releases or plugins in a safe environment away from the main live site. The Lead Developer on the SiteWorks team uses Local for this purpose before testing in a live server environment.

For your SiteWorks site, WordPress and u3a SiteWorks updates can be installed automatically (Recommended) or user controlled. During the learning process when we are using LocalWP and the demo site we need to ensure updates are made.

When we open LocalWP there will sometimes be a pop-up advising of an update. Simply follow the instructions on the screen to install it to keep your system up to date.

When we open a demo file in Local, we sometimes see a red circle with numbers in it at the top of the Dashboard or alongside the Plugins menu. Below is a screenshot showing this. Open the menu and you will see update details alongside the affected plugins. Below some have been actioned already and the notification has turned green. The remaining yellow boxes indicate that the update is outstanding. Just click 'update now' which is indicated by the red

ovals. The plugin will update and the line will turn green. Once all updates are complete it's back to business as usual.
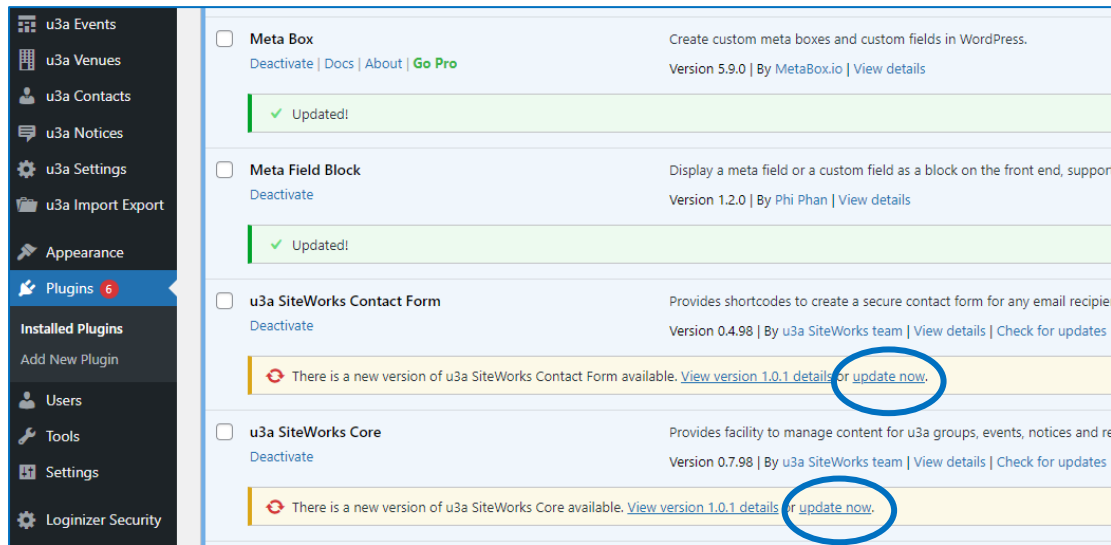
The 'Any Town & District' demo file is updated on a regular basis to reflect any product changes, including plugin updates. We don't anticipate any Web Manager learning SiteWorks using Local and the demo file for months on end. It is likely that you'll download the zip file once only and complete your learning using that file. If you do find you have had to take a lengthy pause for some reason, you might find it beneficial to download a new copy so that you are working on the latest version. Note that when you load a second or subsequent copy of the demo file into Local you can call it by a different name so that you don't overwrite the work you have already done on the original file.