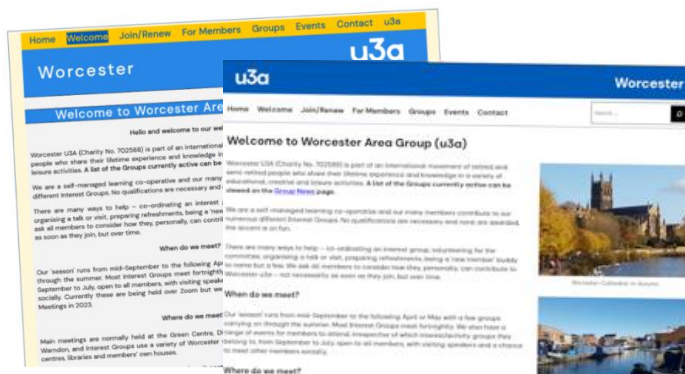


SiteWorks

Administrator's Guide

Foundation



v2.0
July 2026

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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
	v2.0	July 2026	Changes based on WP7 and u3a plugin updates. (Mainly in this documents' sections, (some renumbered), 1a, 2, 2a, 2b, 3d, 4, 4a, 4b, 5a, 5b, 5c, 6a, 7a, 7b, 7d, 7e, 9a, 10)

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 third 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 the [Advanced Applications](#) section but Authors do not need to use this guide at all.

If you are a new Web Manager with no WordPress knowledge at all or see yourself as a non-techie then that is not a problem. 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.

¹ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

1a How to Use this Guide

There is no need to learn anything by heart, because 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 – 4 hours 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 much of their time updating pages, so the Foundation Editing Guide and sections in this guide 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. This guide outlines the processes and points you to the User Guide when you need more detail.

u3a Web Managers with a new site

If you are a Web Manager for a new u3a or a u3a moving to SiteWorks from another platform and hosting service, then you will be getting a Starter Site. This is a SiteWorks site with some general headings and sample content.

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 coming from another site 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 (Site Administrators) need to know about editing and administrative functions.

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.

² This link takes you to a page on the SiteWorks website with this information. See also Appendix A

1c Setting Up Ready to Start

All user roles are required to login, 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 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

All users should read the Website Terms of Use, found in the footer section of each page on your u3a website. This provides a link to your u3a Privacy Policy.

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.

Standard Operating Procedures – S.O.P.s

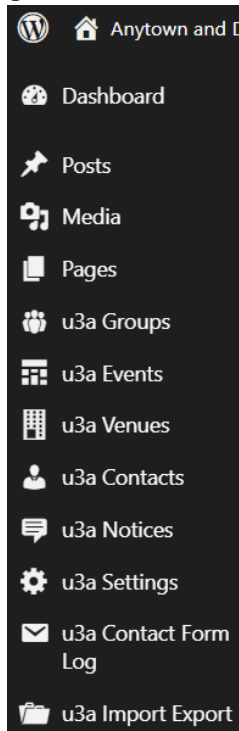
SiteWorks S.O.P.s are covered in [SiteWorks Admin tasks](#) section and you can read them now on the [SiteWorks website](#).³

³ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

Section 2 – Dashboard Menu & Plugins

This section is primarily aimed at Administrators although some parts may also 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.

The section that follows is an introduction to the “Dashboard Menu” and plugins generally, followed by details about each Dashboard Menu u3a item.



- The Dashboard Menu items left are shown to any user logged in as an Administrator or Editor. An Author will not see the ‘u3a Settings’, ‘Contact Form Log’ or ‘u3a Import Export’ menu items.

- ‘Dashboard’ – this provides a customisable page of summary information about your website including any software updates.

- ‘Posts’ – used to create and manage "blog" type content.

- ‘Media’ – the place to manage file uploads for your site.

- (images, documents and so on)

- ‘Pages’ – used to create and manage website pages.

- ‘u3a Groups’, ‘u3a Events’, ‘u3a Venues’ and ‘u3a Contacts’, 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.

- ‘u3a Notices’ allows you to post time-critical notices on pages.

- Two more Dashboard Menu u3a items are ‘u3a Settings’ and ‘u3a Contact Form Log’. These are discussed in [6a u3a Settings](#) later.

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

Data such as group name, venue, activity, name of group leader, and so on is used again and again on your site. With SiteWorks you enter this information once only and then call it up when needed. 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 [6a u3a Settings](#).

The following menu entries are only shown to an Administrator

- ‘Appearance’ – For experienced administrators to alter the website appearance.

- 'Plugins' – To manage currently installed and add new plugins.
- 'Users' – Defines who may log in to the website and what privileges they have to edit content.
- 'Tools' – Facilities for experienced administrators.
- 'Analytics' – Statistics on visits to your website.
- 'Settings' – WordPress settings to only be changed by experienced administrators.
- 'Loginizer security' – used to handle "brute force" login attempts.

2a What's a Plugin?

u3a SiteWorks is based on 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 what our u3a SiteWorks Development Team have done. The additional code is called a plugin. The u3a plugins give us the ability to manage things that are unique to the 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 Dashboard Menu u3a items but all user roles can use this content, for example when adding a new event as discussed in the SiteWorks Foundation Editing Guide.

If you navigate to your Dashboard Menu on the left of the screen, you will see a list of items as shown below left. 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. (Partial example shown below)

	Description
☐ Gutenslider — The last WordPress slider you will ever need. Opt In Deactivate	WordPress slider plugin for Gutenberg. Create an image slider, video slide top. Slide anything! Version 6.1.0 By eedee View details Rate Gutenslider ★★★★★
☐ Insanity Settings Deactivate	Insanity stops insanely huge image uploads Version 2.8.4 By Exactly WWW View details
☐ Independent Analytics Analytics Dashboard Opt In Deactivate	User-friendly website analytics built for WordPress Version 2.8.9 By Independent Analytics View details
☐ Lightbox for Gallery & Image Block Deactivate	Adds a Lightbox to the Block Editor (Gutenberg) Gallery & Image Block. Version 1.15 By Johannes Kinast View details
☐ LiteSpeed Cache	High-performance page caching and site optimisation from LiteSpeed

In addition to u3a plugins our development team have chosen and tested some third 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 third party plugins have been tested to ensure that they work with our customised version of WordPress and they are approved. More plugins may 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. If you deactivate one of them then that element of your site won't work.

Non-u3a Plugins Warning

Thousands of third party plugins are available but these have not been tested to work in combination with the u3a plugins. The Starter site installed plugins are currently the only plugins recommended and supported by the SiteWorks team for use on SiteWorks u3a sites. (See Appendix B for more information)

Any additional plugins that you install have 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. 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.

Administrators 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 unsupported additional plugins and confirm that the issue still occurs.

Despite the above it has been found that Administrators 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 Information

The SiteWorks software distributions include all the required plugins. Users with Administrator privileges should note the following important points:

- 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 [SiteWorks Operating Procedures](#) (both in the Web Manager menu) are maintained at all times. Of particular note is Section 2.3 of the Standard Operating Procedure regarding additional unsupported plugins. The GDPR implications of all third-party plugins must be reviewed by studying their documentation, FAQs, etc. It should be noted that some plugins may log editing or other activities undertaken by users or site visitors.
- It should be noted that even if the collected information relates to users given access rights by the u3a Committee and Administrator and is only accessible by the Administrator(s), it is still subject to GDPR. The modification to the *Terms of Use* is of particular importance if:
 - The logging facility related to the contact page is activated.
 - Any plugin added that collects user and visitor activities.
- 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. It should be noted that deleting “test” plugins may not “clean up” properly and can leave settings or data on the production site that can affect site operation and may be difficult to resolve should a problem arise.
- Web Managers are **strongly discouraged** from installing additional plugins unless they have undertaken extensive testing using a LocalWP site, to ensure there are no software compatibility issues, etc.
- Web Managers are **warned against installing** any plugin that circumvents the standard login configuration of a username and password. Plugins that offer passwordless logins, that send a code to a user’s email, are **NOT** to be used.
- When the System Administrators note that a Web Manager is using an unsupported plugin which requires a security update, the System Administrators will update the plugin to protect the integrity of the SiteWorks server. The Website Administrator should be aware that this update may impact functionality; hence, checks must be made if the update occurs.
- When the System Administrators become aware of a Web Manager using an unsupported plugin that may directly impact the integrity of the SiteWorks system and its servers, System Administrators will unconditionally delete the plugin.

Use of LocalWP

If you do intend to use third party plugins then you should not install and test them on your live site. Instead, you should use an offline development software such as [LocalWP](#) ⁵.

^{4, 5} This link takes you to a page on the SiteWorks website with this information. See also Appendix A

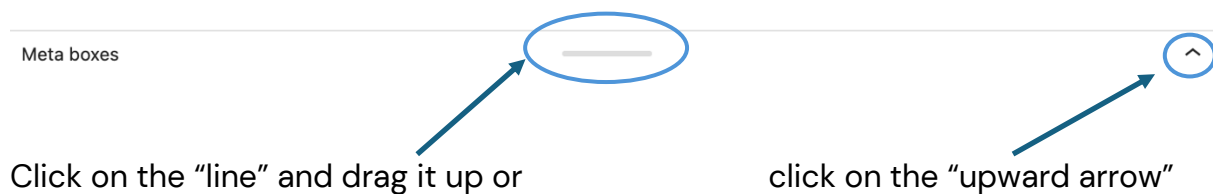
2b Form (Meta boxes area) controls (WordPress 7.0 onwards)

When editing Events, Groups, Contacts and Venues they have an Information area at the top of the page and a Form or 'Meta boxes' area below, which contains text boxes / drop downs (data fields) that are either required or optional to contain information.

For example, with a Contact, the email address; with a Group, it is Status, Category, Meeting Day, Time Period etc. ; with an Event it is Category, Event date etc. ; with a Venue it is Address Line 1, Town, etc.

Initially you may not see the Meta boxes area and there are different controls that allow you to see it and switch between the Meta boxes and the Main body of the u3a element.

You can use the below controls to expose the Meta boxes.



Doing either of these actions will expose the data fields that you can complete and will also expose a small upward pointing triangle on the right.

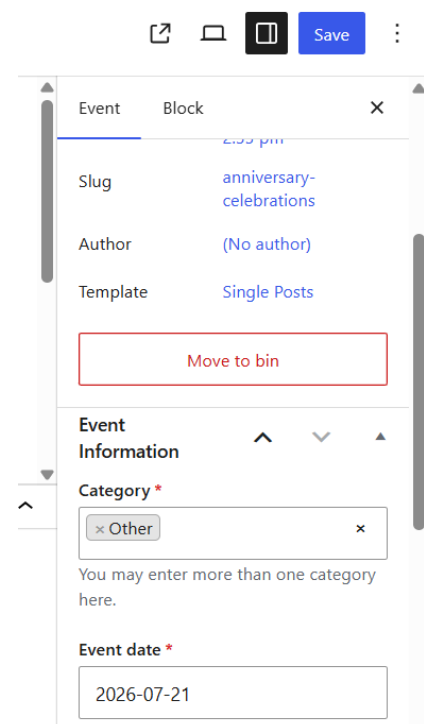


In addition, it sometimes (but not always) exposes a pair of arrow heads (1 pointing up and the other pointing down.)

The upward triangle indicates that the data fields are visible, pressing the down arrowhead will move the data fields into the right-side block settings panel. (You may have to press it twice)

You will then see the three icons in the block settings panel and can move the fields back to the main screen by clicking the upward arrowhead.

If the small triangle is pointing down, the fields below will not be visible and if you press it, it will change to upwards pointing, and the fields will now be visible.



2c u3a Events

Events can be created and edited by all user roles where the necessary permissions have been given.

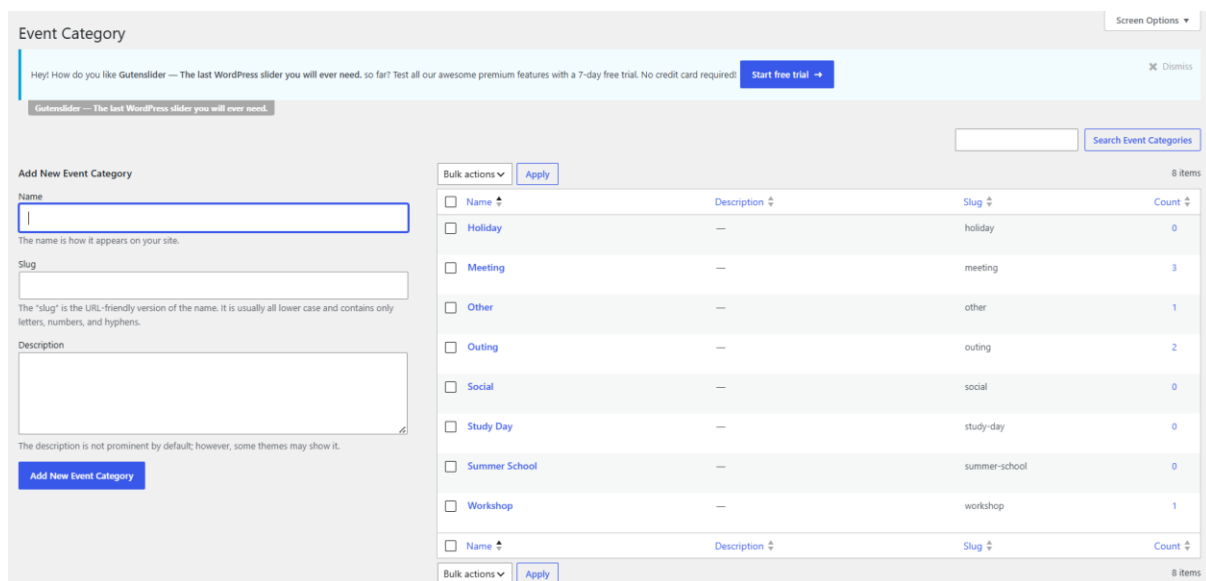
In the Editing Guide we discuss adding or editing u3a Events, including populating the Meta boxes fields and drop-downs that then appear on your event when published. The options in the drop-down fields come from data entered via other Dashboard Menu u3a items and these are covered in this section.

Event Categories

Event categories have been mentioned earlier. 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 item of your Dashboard Menu and you will get the screen below.



Event Category

Hey! How do you like Gutenberg — The last WordPress slider you will ever need, so far? Test all our awesome premium features with a 7-day free trial. No credit card required! [Start free trial →](#)

[Dismiss](#)

[Gutenberg — The last WordPress slider you will ever need.](#)

[Search Event Categories](#)

Add New Event Category

Name

The name is how it appears on your site.

Slug

The "slug" is the URL-friendly version of the name. It is usually all lower case and contains only letters, numbers, and hyphens.

Description

The description is not prominent by default; however, some themes may show it.

[Add New Event Category](#)

Name	Description	Slug	Count
☐ Holiday	—	holiday	0
☐ Meeting	—	meeting	3
☐ Other	—	other	1
☐ Outing	—	outing	2
☐ Social	—	social	0
☐ Study Day	—	study-day	0
☐ Summer School	—	summer-school	0
☐ Workshop	—	workshop	1

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.

2d u3a Venues

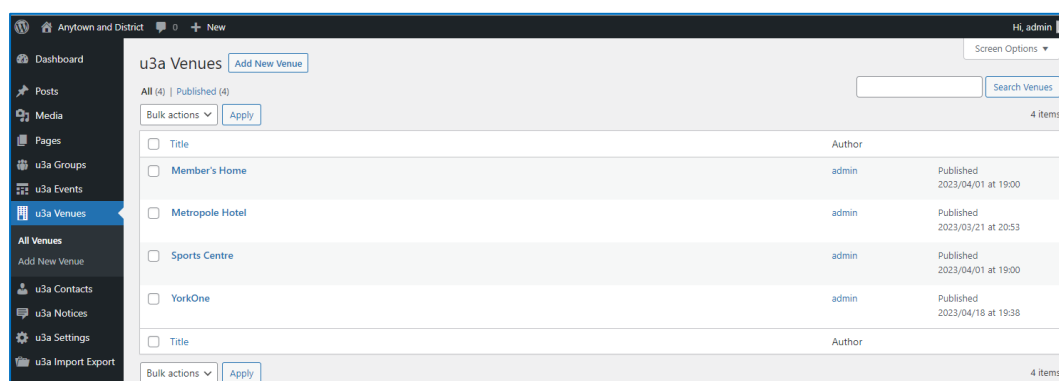
Many of our u3as have venues that are used by multiple groups for activities. This feature enables information about the venue to be stored and called up

when needed for an event or maybe a group meeting and the venue data is populated from the venue record.

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

Venues / All Venues

Navigate to u3a Venues or All Venues on the Dashboard Menu and you will be able to view/edit existing venues or add a new one.



New Venues

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

Complete only what you require on this screen as all the data entered is displayed. 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.

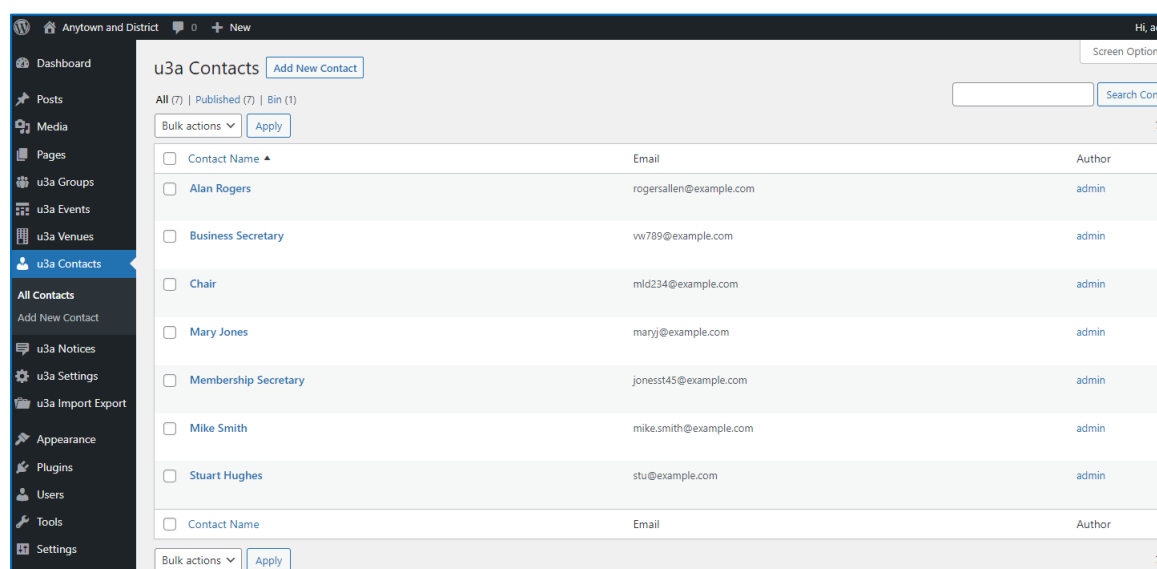
2e u3a Contacts

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 if this has been activated in the u3a Settings > Groups tab.

Contacts / All Contacts

Navigate to your Dashboard Menu, select Contacts or All Contacts, you will get a screen like this and can view all of your contacts alphabetically:



When you click the name of any contact on the list to edit you will see the information area at the top and the Meta boxes form below with that person's details in it. You can enter as much detail as you like, but this is a time to consider what you want to show.

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 third-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.

As you enter details in the information area and the Meta boxes fields, consider the policy of your own u3a and consider photographs, phone numbers or the person's surname and if these are not what you want to see on your Contact or Group contact page. As always please be aware of GDPR. Any personal details should only appear with the permission of the person concerned. Be aware that if a phone number or photo 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

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 Meta boxes form. In the top information area, enter the name of the contact exactly as you want it to display on your site. You can add more information using any block you like. The Meta boxes look like this:

Meta boxes

Contact Information

A contact may be generic with a display name, e.g. like "French Leader"

Each item of information is optional and should be omitted if the contact does not want to be contacted by that method.

u3a Membership Number

Given Name

Family Name

Phone number

Alternate phone number

Email address

Simply complete the Meta boxes with as much or as little information as you wish according to the GDPR policy of your u3a and 'Publish' the contact. u3a Membership Number, Given Name and Family Name are not displayed anywhere on your SiteWorks Site, but maybe useful to Admins. (GDPR allowing) Either phone number or Alternate phone number WILL be displayed on a Group page (if the contact is listed as a group leader/coordinator/convenor).

2f u3a Groups

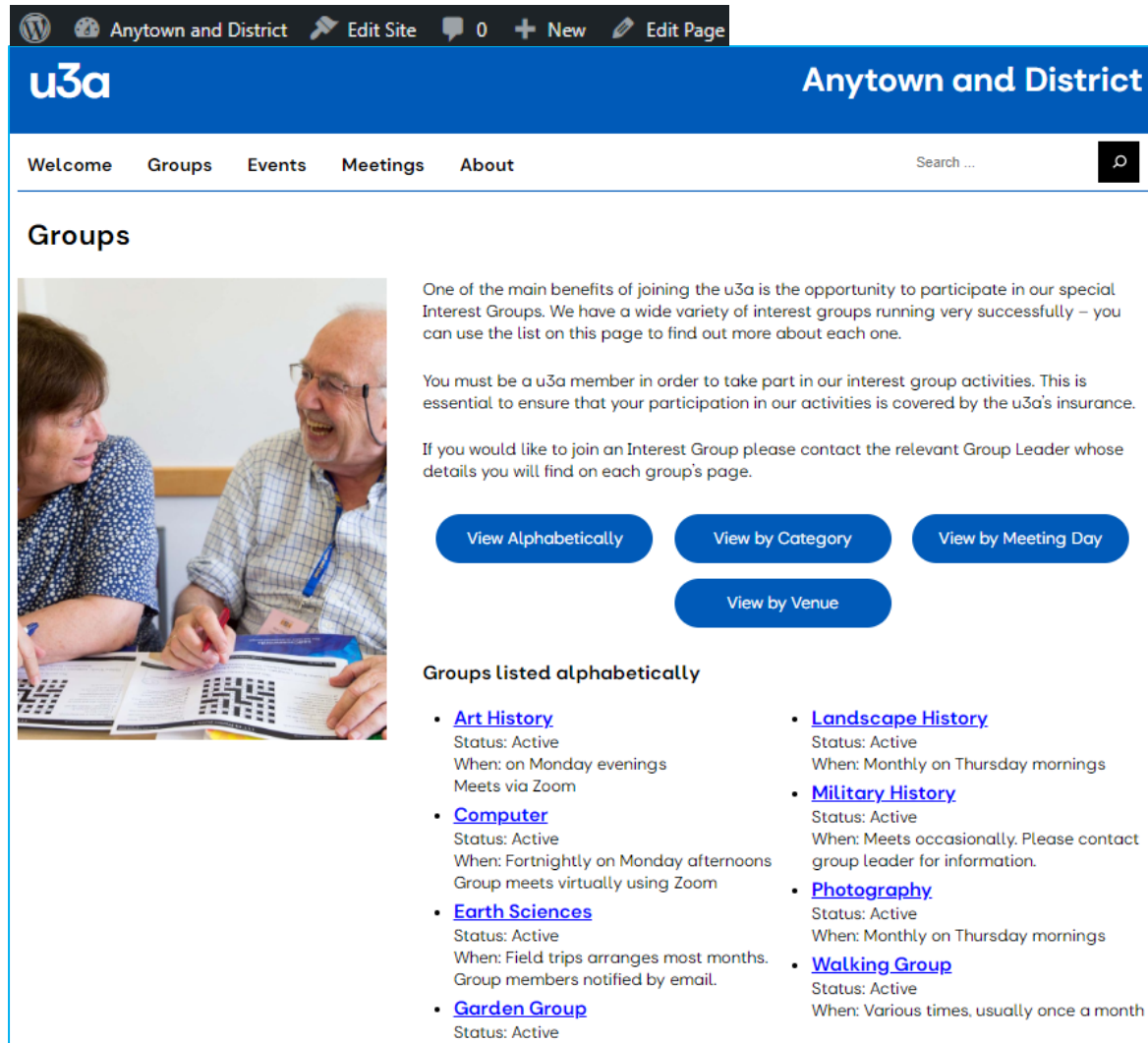
Groups can be created and edited by all Administrators, and Editors where the necessary permissions have been given.

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 Menu and select it you will see that you have three items; All Groups, Add New Group, and Group Categories. We'll look at each in turn.

Group / All Groups

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



Anytown and District

u3a

Welcome Groups Events Meetings About

Search ...

Groups

One of the main benefits of joining the u3a is the opportunity to participate in our special Interest Groups. We have a wide variety of interest groups running very successfully – you can use the list on this page to find out more about each one.

You must be a u3a member in order to take part in our interest group activities. This is essential to ensure that your participation in our activities is covered by the u3a's insurance.

If you would like to join an Interest Group please contact the relevant Group Leader whose details you will find on each group's page.

View Alphabetically View by Category View by Meeting Day View by Venue

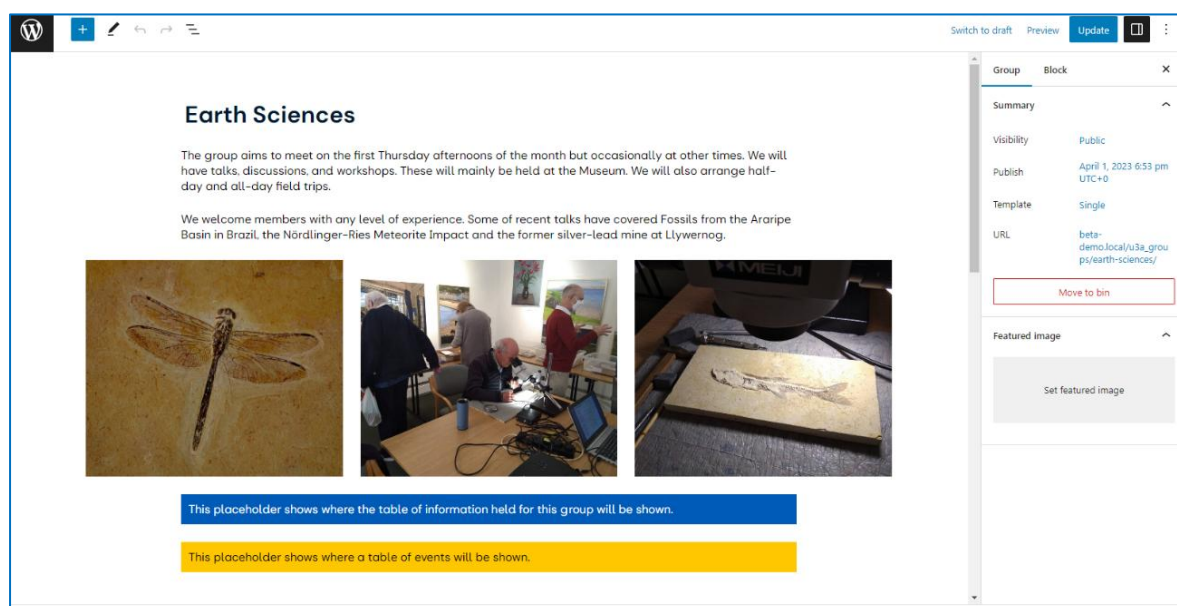
Groups listed alphabetically

- [Art History](#)
Status: Active
When: on Monday evenings
Meets via Zoom
- [Computer](#)
Status: Active
When: Fortnightly on Monday afternoons
Group meets virtually using Zoom
- [Earth Sciences](#)
Status: Active
When: Field trips arranged most months.
Group members notified by email.
- [Garden Group](#)
Status: Active
- [Landscape History](#)
Status: Active
When: Monthly on Thursday mornings
- [Military History](#)
Status: Active
When: Meets occasionally. Please contact group leader for information.
- [Photography](#)
Status: Active
When: Monthly on Thursday mornings
- [Walking Group](#)
Status: Active
When: Various times, usually once a month

From here you can edit any general text and graphics relating to this overall Groups 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 you select Earth Sciences group on the u3a demo site and select the 'edit group' option (Top of this Group page) you see a screen that looks like below:



A reminder that we can get to this same page via the Groups/All Groups item on the Dashboard Menu and selecting the group to edit 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 different in this context are the two blocks at the bottom.

Note: As shown above, 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.

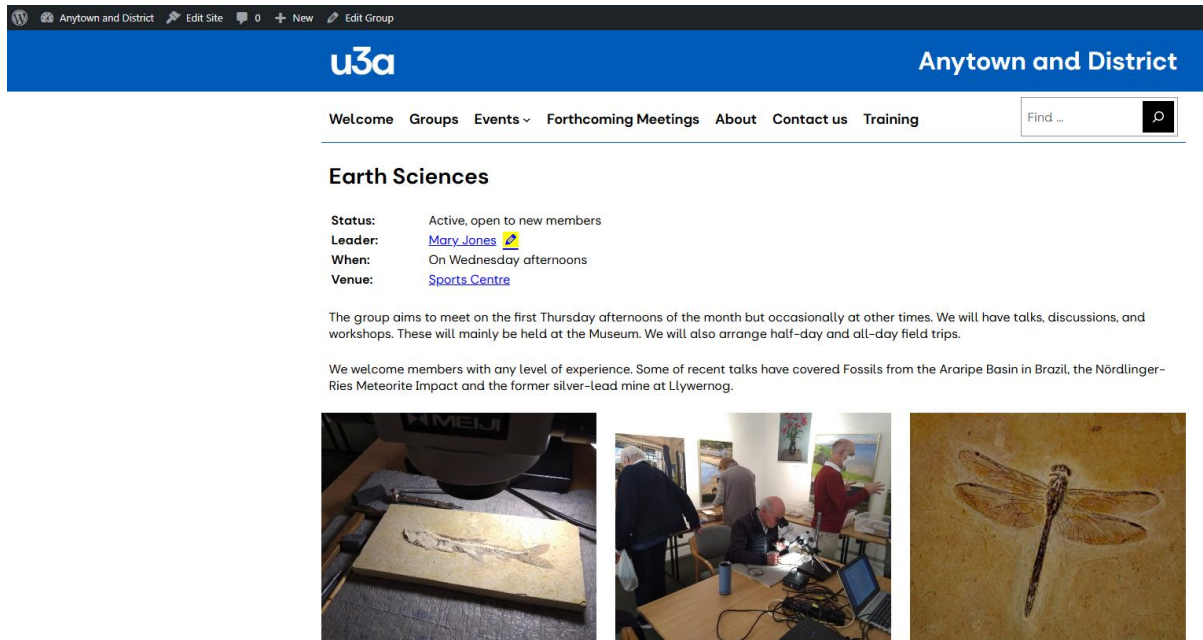
By switching back to Site View for the Earth Sciences group you can see below how this information presents itself :



Status: Active, open to new members
Leader: [Mary Jones](#)
When: On Wednesday afternoons
Venue: [Sports Centre](#)

This 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 others 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, 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 hamburger⁶) it shows that 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.

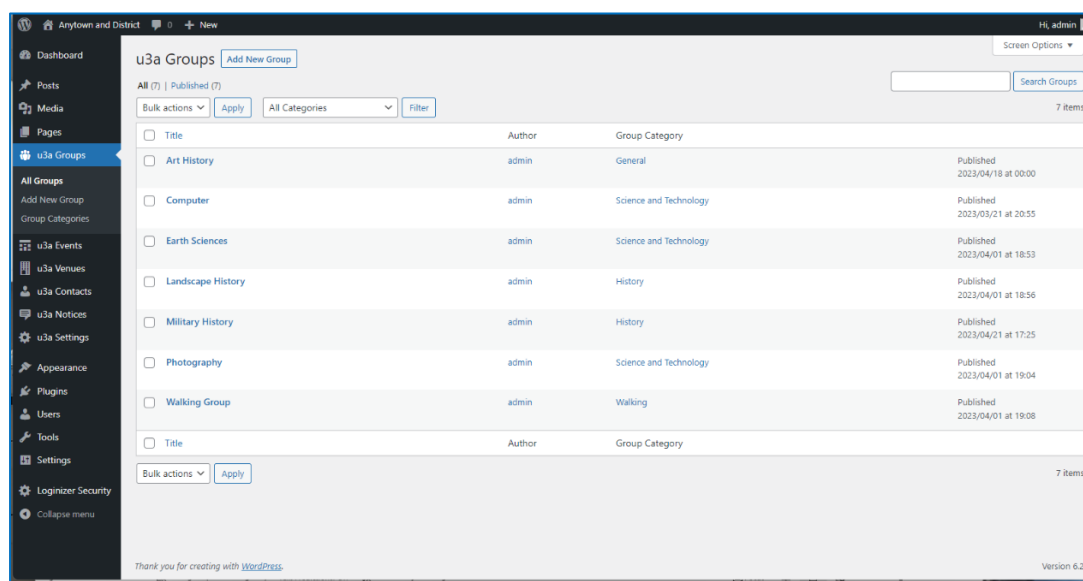
You can easily click, hold and drag the u3a single group data block within the expanded hamburger list as an alternative to the method listed above.



n.b. The hamburger is discussed in the Editing Guide in the 'three main editing tools' section. You can see the icon above in the red circle in this graphic and is found at the top left of the screen next to the undo/redo arrows when editing a page.

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

If you select All Groups on the Dashboard Menu, 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 Menu. Either way you'll get these Meta boxes to complete, it's a long form and only the top part of it is shown here.

The screenshot shows the 'Enter group name' form. At the top, there's a red banner that says 'Please enter the name'. Below it, the main heading is 'Enter group name'. There are two placeholders: a blue one for the group name and a yellow one for the group description. Below these are two input fields: 'Type / to choose a block' and 'This placeholder shows where a table of events will be shown.' The form is divided into sections: 'Group Information' (Status, Category), 'WHEN THE GROUP USUALLY MEETS' (Meeting day, Time period), and 'Featured image' (Set featured image). The sidebar menu on the right includes options like Group, Block, Summary, Visibility, Publish, Template, URL, Pending review, and Featured image.

As before you enter the group name on the information area top line (as you entered the 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 Meta boxes form using the drop-down menus and/or free text where that option is available.

The information you add to the Meta boxes 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. There is another drop-down menu to select the group categories (You can assign multiple categories) such as Sport, History, etc. This data is used for different Group Page views. You can create new 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.

You can ignore the yellow pencil, this is only visible when logged in.

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 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 Group contact.

Group Categories

The third item on the list when editing u3a Groups from the Dashboard Menu 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.

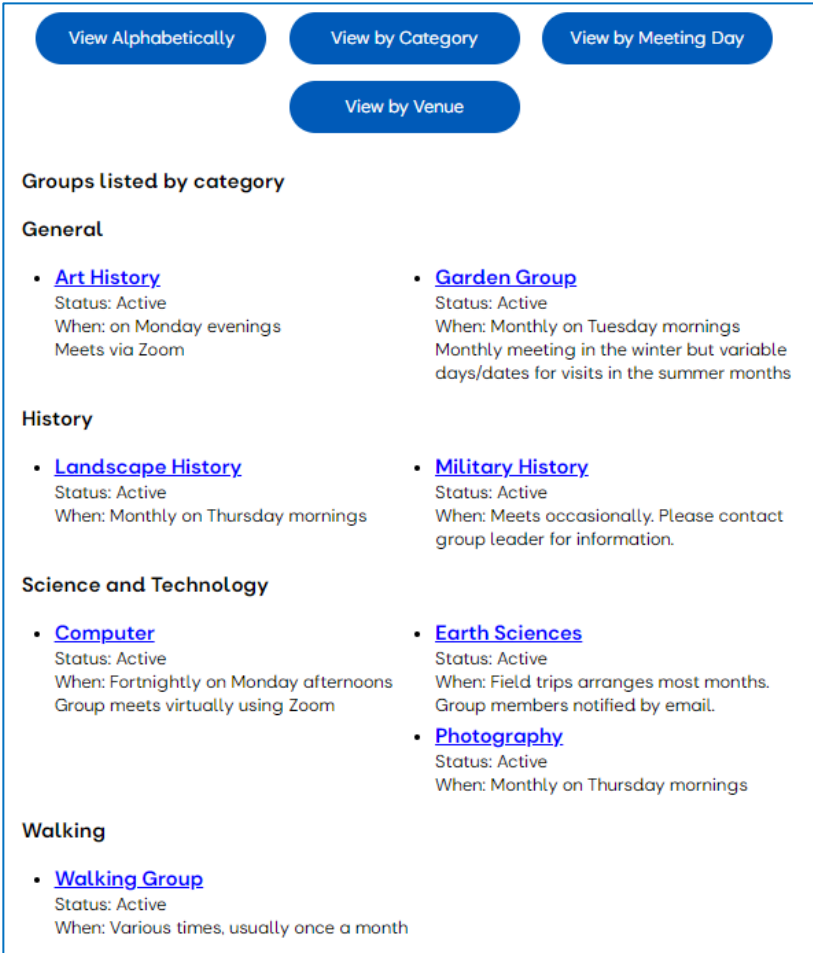
You can view the pages alphabetically as you saw on the first page in this section but can also view them by category, by venue, or by meeting day of the week. Earlier when looking at completing the Meta boxes form for the new group, category and meeting day were fields to complete. This is where that 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 arranged 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

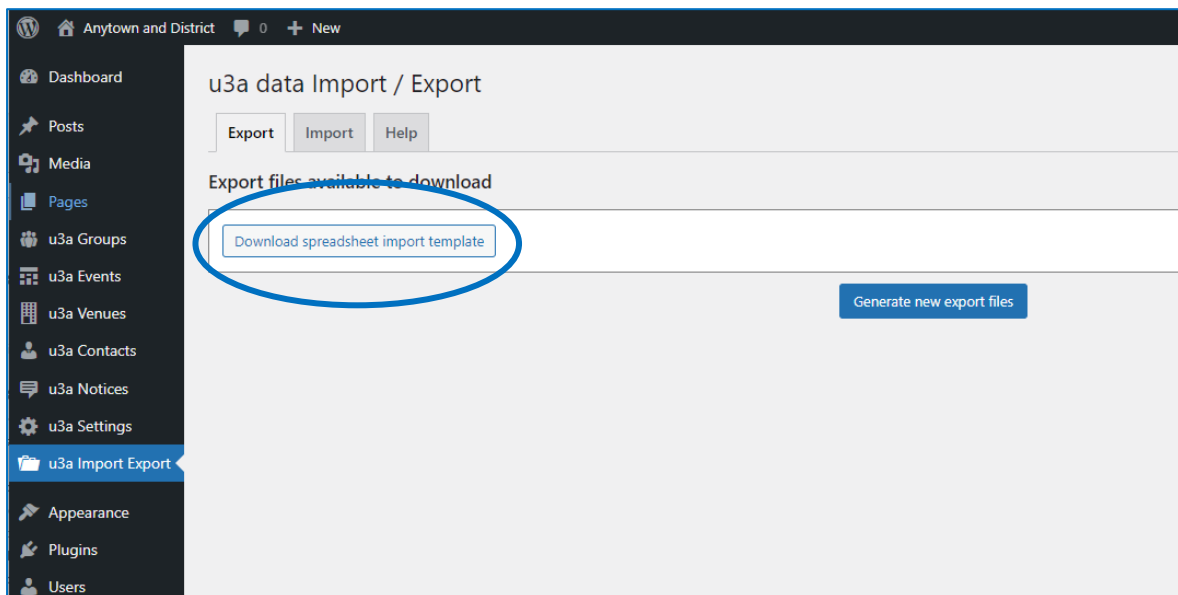
2g u3a Import Export

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. The import capability helps these sites prepare their data in advance and enables 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.

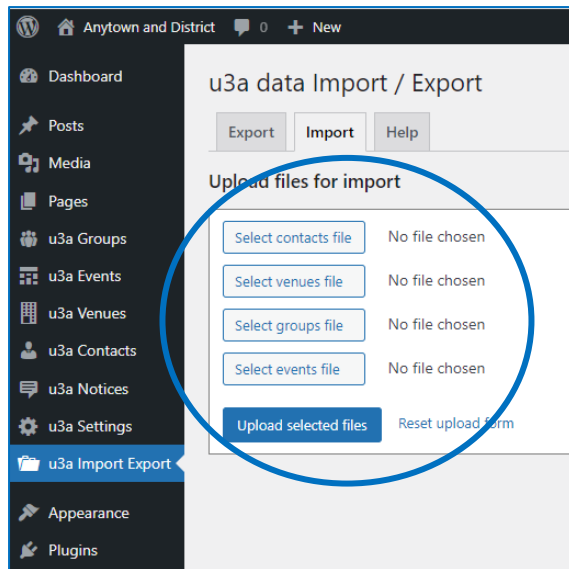
Import data

The first task is to complete the worksheets. To get a copy of these click on 'u3a Import Export' on the Dashboard Menu 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 is valid. If there are any problems these will be displayed showing the line numbers in the file where they occur. If problems are detected the file will not be accepted.

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

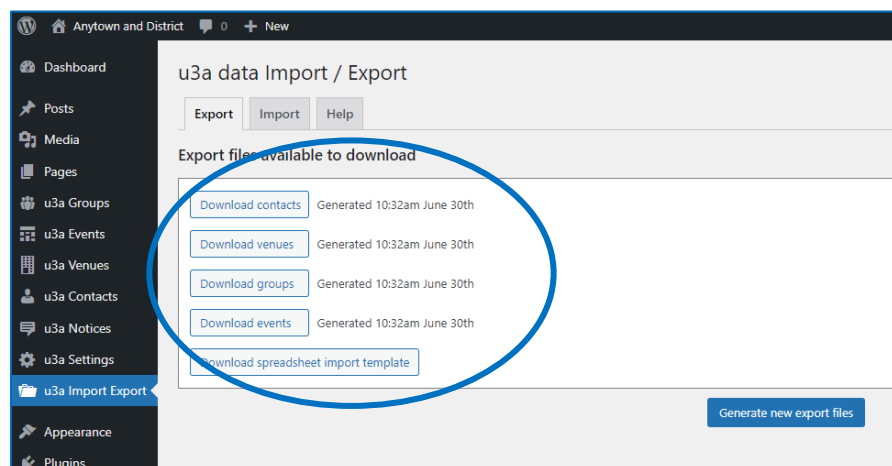
The process of importing files may corrupt your WordPress database. Please make sure you have a current backup of your website before proceeding.

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.

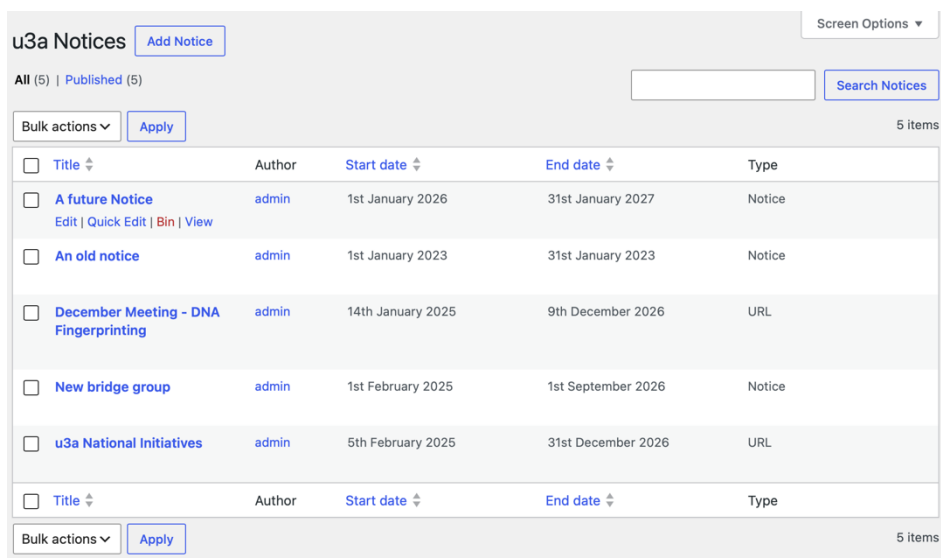
2h u3a Notices

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.

Notices / All Notices

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



☐	Title	Author	Start date	End date	Type
☐	A future Notice Edit Quick Edit Bin View	admin	1st January 2026	31st January 2027	Notice
☐	An old notice	admin	1st January 2023	31st January 2023	Notice
☐	December Meeting - DNA Fingerprinting	admin	14th January 2025	9th December 2026	URL
☐	New bridge group	admin	1st February 2025	1st September 2026	Notice
☐	u3a National Initiatives	admin	5th February 2025	31st December 2026	URL

The above example shows five 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.

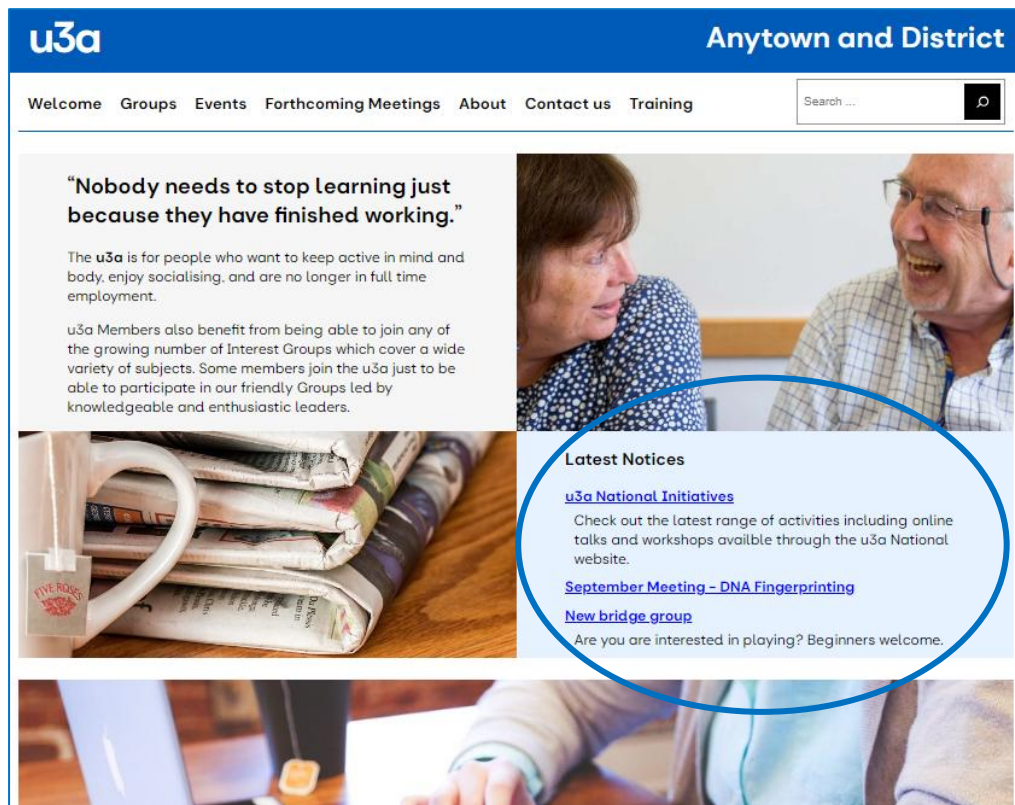
Add New Notice

You can add a Notice in Site View using '+New' or you can add one from the Dashboard Menu. 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 Meta boxes 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 can be 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.

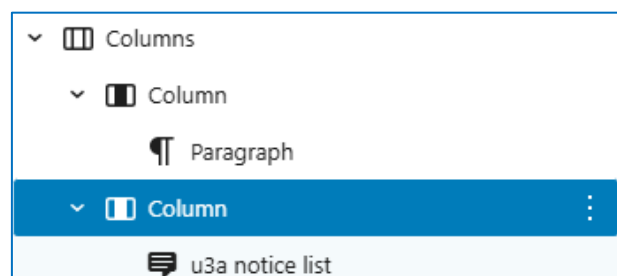


Any new Notices will also appear here. You'll notice the background of the text of the Notice has been coloured.

Notice Block

If you have not used the Notice function before and don't have a Notices section on your site already, you need to set one up so that you have a place to put your notices. 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 (right) 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 the mouse below the block where you want the notices to display until you see the Add New Block facility (+) and add a u3a notice list. 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.

If you select the blue Notices Block above you will see a block settings panel 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)

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		

u3a Dashboard Menu & Plugins Summary

In this section we discussed the Dashboard Menu and 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 a 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

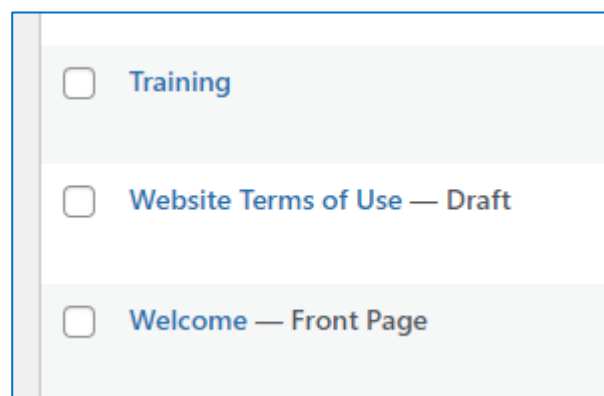
The Home page is the page that is displayed when someone visits your website without specifying any particular page in the URL or clicks on the "Home" link in the site menu. On new SiteWorks sites, the Home page is set to a suitable page but it can be changed later if required.

The 'Home' page can be modified via the Dashboard Menu, 'Settings> Reading' to the page of your choice or 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, get 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 Menu. Please navigate to that page now.

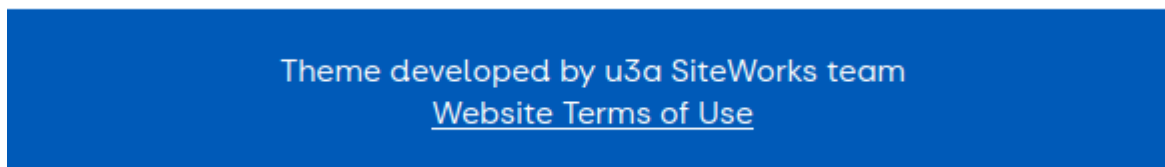


It is strongly recommended that all u3a SiteWorks websites display this page or their own equivalent version of it. This supplied page uses the wording proposed and approved by the Third Age Trust and has been approved by the Trust's legal team. It has been designed to appear in the footer area of all 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.

Website Terms of Use

References to we, us or our means **your u3a's name** u3a, charity number **000000** a charity registered in **England and Wales or Scotland or Northern Ireland**. You can contact us by email at **your_u3a@example.com** or by telephone on **020 1234 1234** or **postal address if available**.

Introduction

These terms and conditions apply between you, the User of this Website (including any sub-domains, unless expressly excluded by their own terms and conditions), and us the owner and operator of this Website. Please read these terms and conditions carefully, as they affect your legal rights. Your agreement to comply with and be bound by these terms and conditions is deemed to occur upon your first use of the Website. If you do not agree to be bound by these terms and conditions, you should stop using the Website immediately. In these terms and conditions, User or Users means any third party that accesses the Website.

Intellectual Property and Acceptable Use

All Content included on the Website, unless uploaded by Users, is the property of **your u3a name** u3a, or other relevant third parties such as our licensors. You have no intellectual property rights in, or to, the Website other than the right to use it in accordance with these terms. The

These highlighted areas need to be customised with your u3a details. They include the name of your site, your charity registration number, a contact email address, (use a hidden address) and a link to your u3a Privacy Policy*.

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

* Every u3a should also have a Privacy Policy already but policy document templates can be found on the Trust's national website 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>

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

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 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.

Below is an example, showing a list block, but a table block is also popular, two of the many possible ways of laying out the contacts:

Contact us

The full committee comprises 8 full members and additional advisors. You are welcome to contact any of the committee members to ask for information, discuss matters or put forward suggestions.

To contact one of our committee members, please choose one of these links:

- [u3a_contact name="Chair"]
- [u3a_contact name="Membership Secretary"]
- [u3a_contact name="Business Secretary"]

Our u3a is a member of the Borders u3a Network. Use these links to contact the Network:

- [u3a_contact name="Network Chair" email="networkchair@example.com"]
- [u3a_contact name="Network Secretary" email="networksec@example.com"]

The above screenshot shows two ways to add Committee email information to a Contacts page. In this example if the contact names are in your u3a Contacts already, then you can use the shortcode which omits the email address, as in [u3a_contact name="Chair"]. This is convenient as changing the Contact email means a once only change of the email for the whole site. The full form of the u3a_contact shortcode is used at the bottom of this example for those emails that might only be used once on the site or you don't want create a Contact.

When viewed on the website, this will appear as below (A red error message would indicate the incorrect use of the shortcode or missing contacts):

Contact us

The full committee comprises 8 full members and additional advisors. You are welcome to contact any of the committee members to ask for information, discuss matters or put forward suggestions.

To contact one of our committee members, please choose one of these links:

- [Chair](#)
- [Membership Secretary](#)
- [Business Secretary](#)

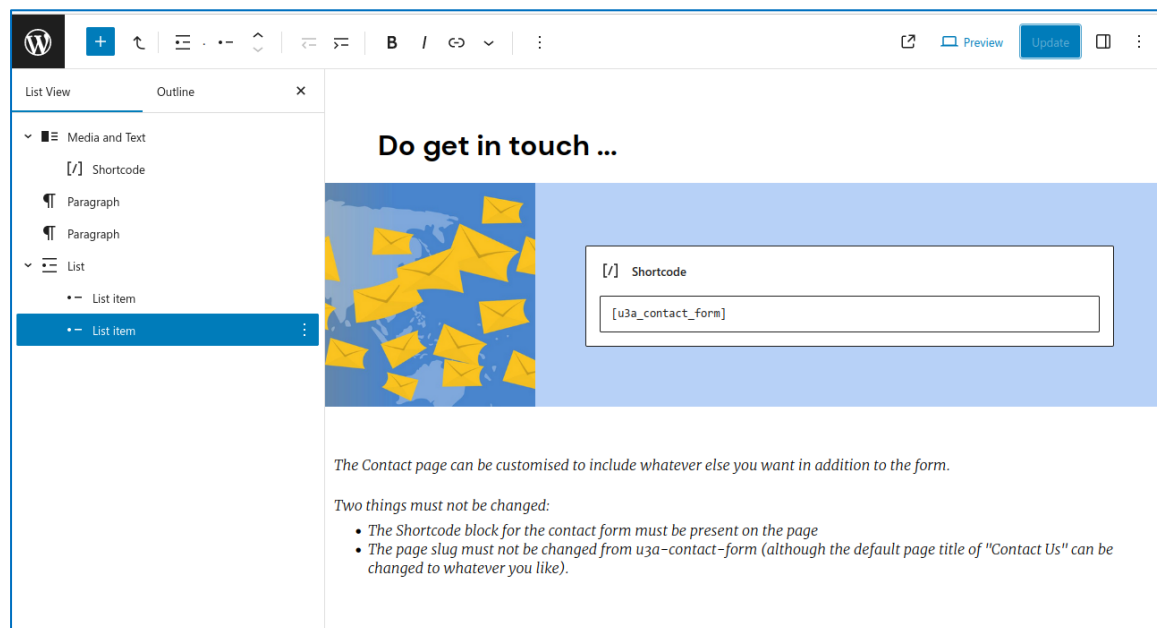
Our u3a is a member of the Borders u3a Network. Use these links to contact the Network:

- [Network Chair](#)
- [Network Secretary](#)

The Contact form Page can be found near the top of the list displayed when selecting Dashboard Menu > Pages.

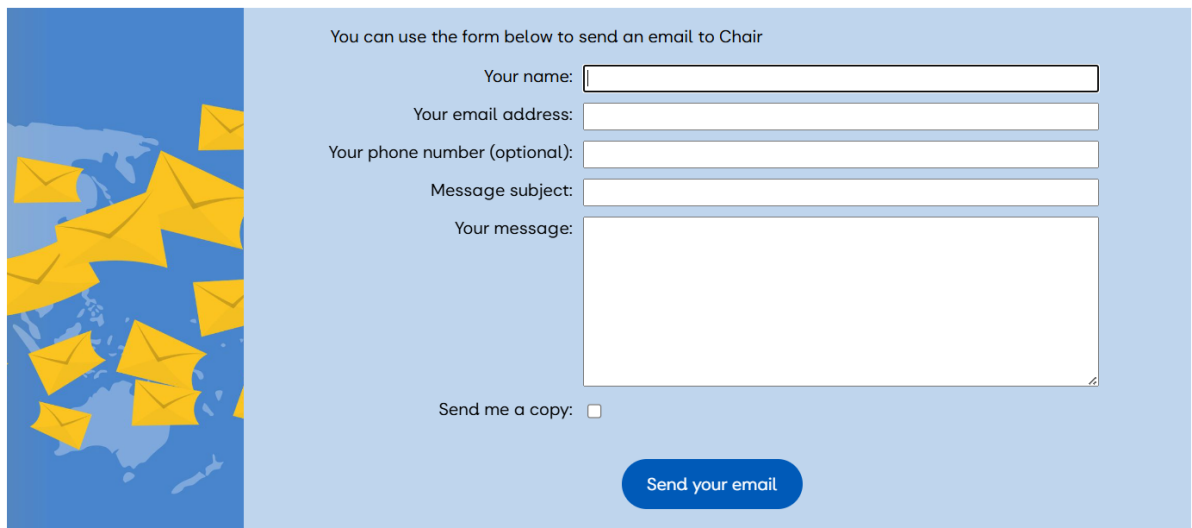
☐ **Contact Us** — Contact Form Page, do not remove
[Edit](#) | [Quick Edit](#) | [Bin](#) | [View](#)

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:



In response to a visitor click on a contact link, the contact form looks like this:

Contact Us

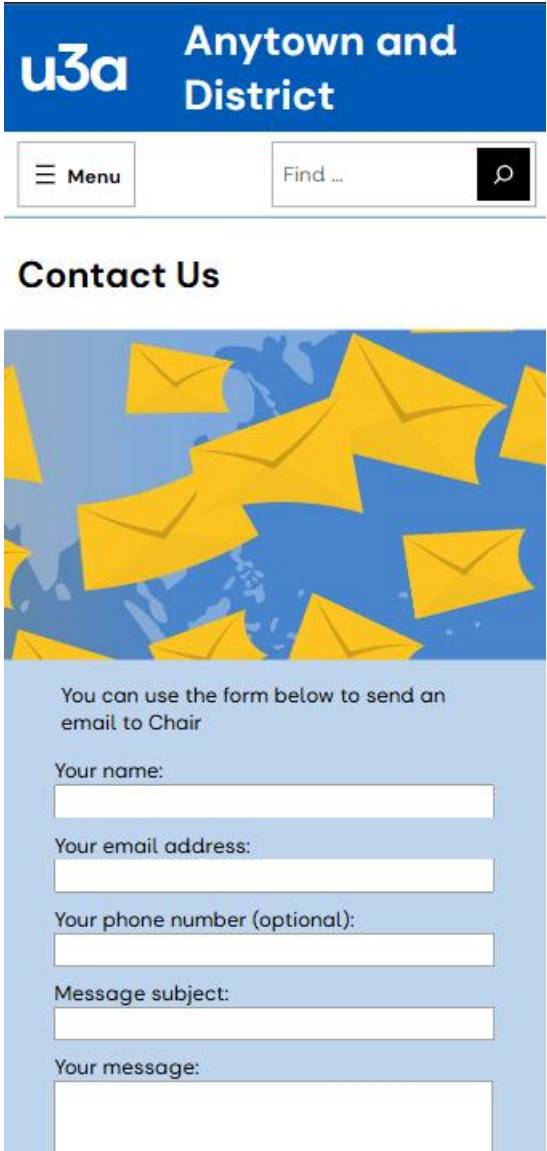


The contact form is displayed on a light blue background. On the left is a vertical sidebar with a world map and yellow envelope icons. The main content area contains the following elements:

- A heading: "You can use the form below to send an email to Chair"
- Form fields:
 - "Your name:" followed by a text input field.
 - "Your email address:" followed by a text input field.
 - "Your phone number (optional):" followed by a text input field.
 - "Message subject:" followed by a text input field.
 - "Your message:" followed by a large text area.
- A checkbox labeled "Send me a copy:".
- A blue button labeled "Send your email".

If viewed on a smartphone it looks like this:

In both cases when logged in as an Administrator your name and email will be pre-filled. These fields will be blank for visitors to your site. The option to “Send me a copy” will ONLY appear if you are logged in as an Administrator; Editor or Author.



The image shows a smartphone screen displaying the u3a Anytown and District website. The header is blue with the u3a logo and the text "Anytown and District". Below the header is a white navigation bar with a "Menu" button and a search bar labeled "Find ...". The main content area has a blue background with yellow envelope icons and the heading "Contact Us". Below this is a light blue box containing the following text and form fields:

You can use the form below to send an email to Chair

Your name:

Your email address:

Your phone number (optional):

Message subject:

Your message:

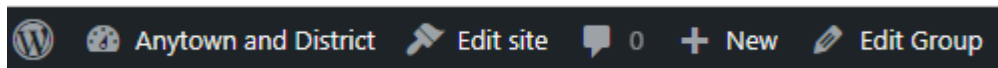
In conclusion, the approach taken by SiteWorks is flexible and provides far greater scope for u3as to produce contact lists that contain exactly the information they want and presented in whatever way they choose.

3d Navigation buttons, Headers and Footers

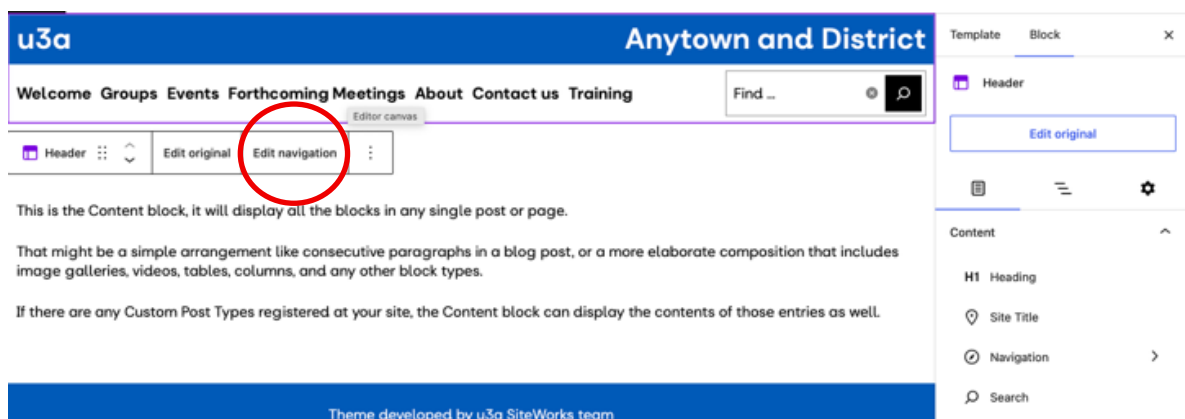
The navigation buttons, headers and footers appear on every page. For existing sites, they will already be in place and probably won't need changing any time soon. For Web Managers with a Starter site, you will have some basic buttons but will probably want to add more.

Navigation Menu buttons

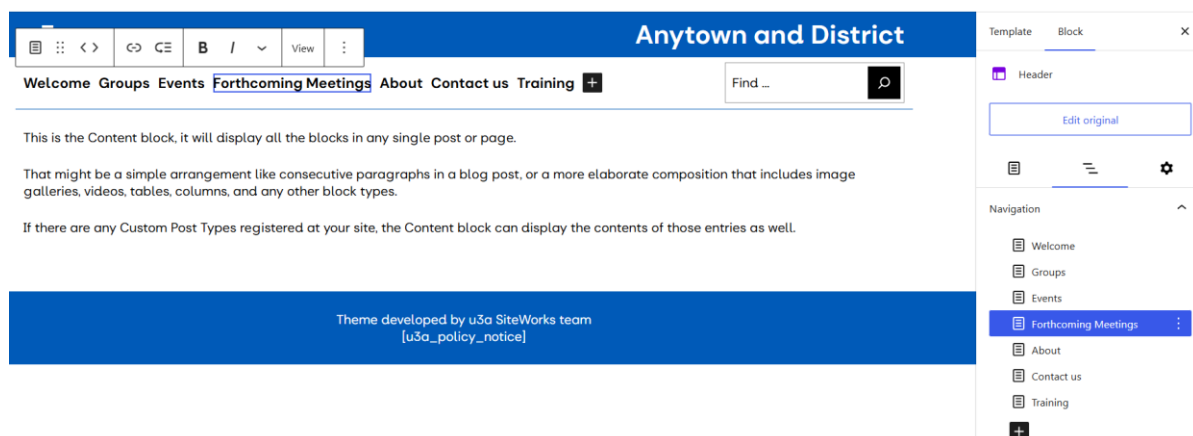
When logged in, on any page you need to select 'Edit site' on the top line.



This will bring up the following screen (though not the same buttons) as seen below. I have clicked on the navigation menu buttons (Welcome Groups ... Training) and now have a format ribbon below the menu buttons and I select 'Edit Navigation'. I also have the Navigation block shown in the block settings panel to the right, where the names of the navigation buttons are listed.



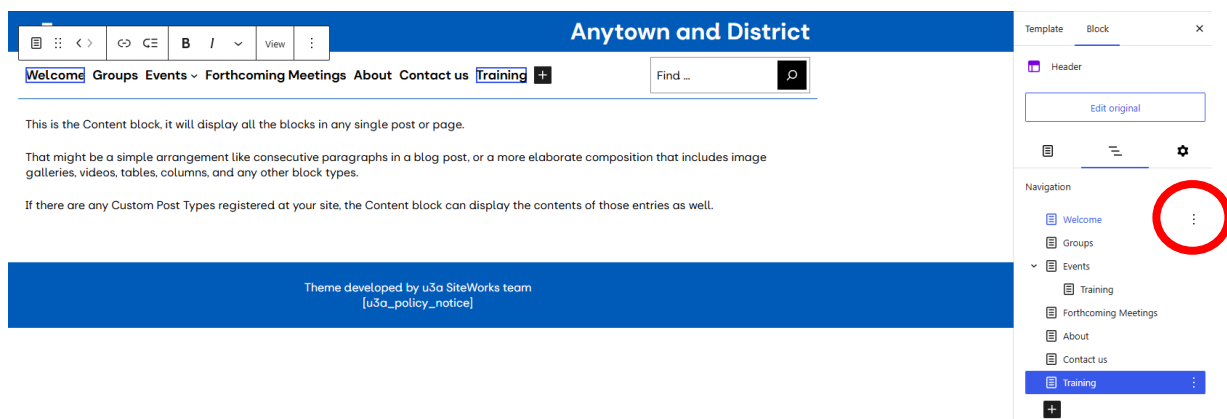
You can see below that there is a '+' sign at the end of the horizontal list of navigation buttons and also a '+' sign at the bottom of the vertical list on the right block settings panel. If you want to add a new button then use one of the '+' signs to do it. You can then use the pop-up toolbar in the buttons section to move the new button left or right as desired or you can select it on the block settings panel and drag to the position you want it to be in.



Note that on the block settings panel you can select and drag a button to the right of another existing button to give you a submenu button shown here below right. By selecting a horizontal navigation menu button, you open a toolbar that has formatting options and also a submenu button.  as an alternative method.

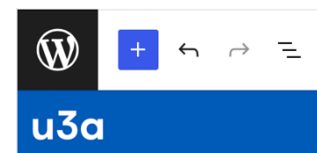
Navigation buttons that have a submenu have a down arrow alongside the button name.

If you hover over the list in the block settings panel (right) you will see three vertical dots (circled red here). These give you an option to add a sub-menu to the item selected. It also gives you the option to move the item up or down or to delete the item.



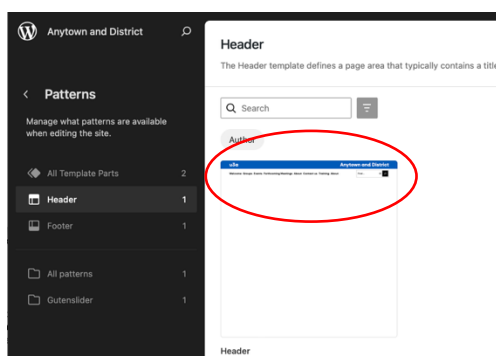
Save your changes when done and view your page. You MUST press Save twice. Read what it says after the first press.

To exit back to the Dashboard Menu, click the **W** symbol at the top left of the screen and it will take you back to the Template screen, click the same symbol once more.



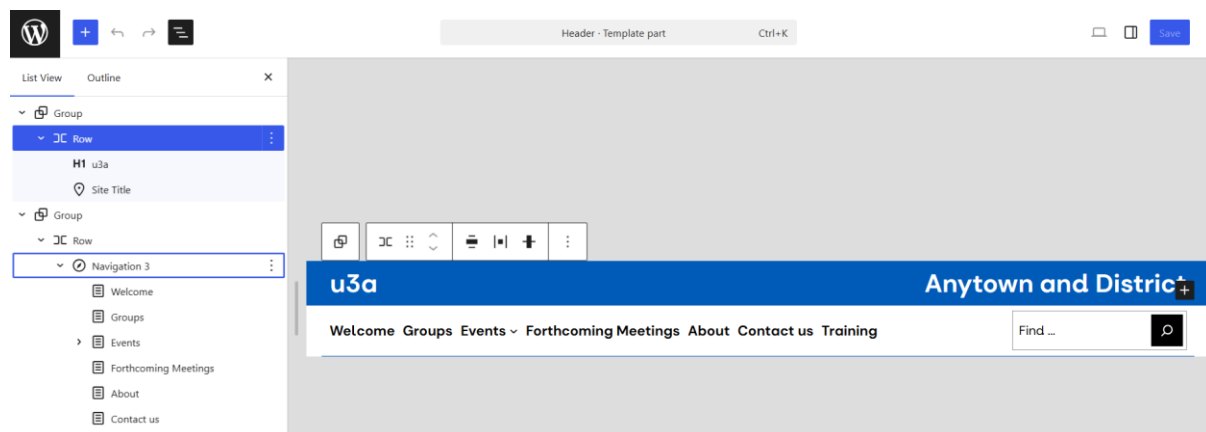
Editing the Header and Footer

Go to the Dashboard Menu, select 'Appearance>Editor>Patterns'. You can choose Header or Footer.

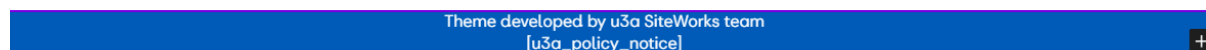


Click on the image shown in the right pane, (circled in red) then the 'hamburger', and expand the '>' to see the block structure.

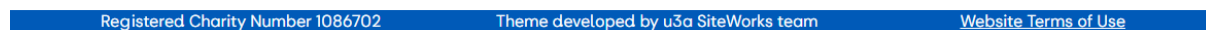
The Header is shown as below.



Click into the empty blue space (of the Header or Footer) and you can add a block in the same way as you add blocks elsewhere on your site. Or use the three dots next to the block shown in the 'hamburger' for options. Some u3as have their own logo that they wish to display. Others want their registered charity number to appear in this space but there are other applications as well.



All SiteWorks sites come with a pre-defined Footer pattern that contains several blocks. One states, 'Theme developed by u3a SiteWorks team', and the other '[u3a_policy_notice]' 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.



You can customise your header and footer but you must not change your site name (Use u3a Settings) nor remove the 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 they 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.

⁷ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

Section 4 – Site-wide Editing of Groups & Events

The Editing Guide covers creating and editing Group pages and Events. In the main, the Editing Guide includes things that all categories of Users 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.

For example, an Administrator can set the way that Groups and Events are displayed and can set-up and use the Dashboard Menu item, 'Contact Form Log', that enables a site to record the email addresses of visitors using the Contact Form.

4a u3a Groups, Display options

Within groups you are able to show or hide items such as status, time, and venue, can 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

Multiple categories can 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

Cultural

[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

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

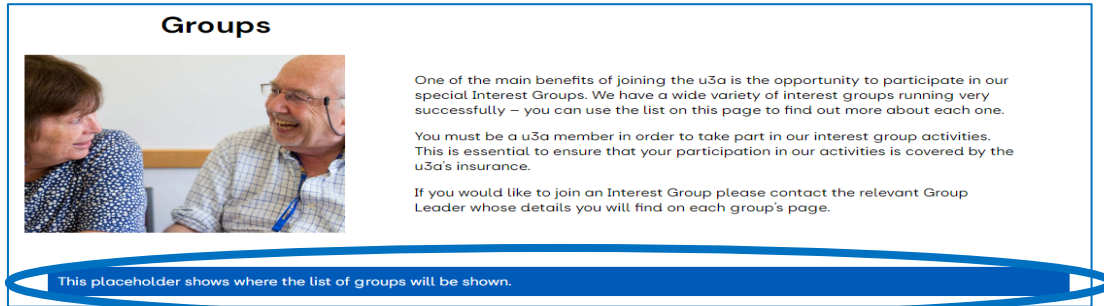
[Genealogy](#)
Status: Closed

[Local History](#)
Status: Active
Venue: [Bishop Auckland Methodist Church](#)
on Fridays
2nd Friday 10 for 10.30

u3a groups, list block updates

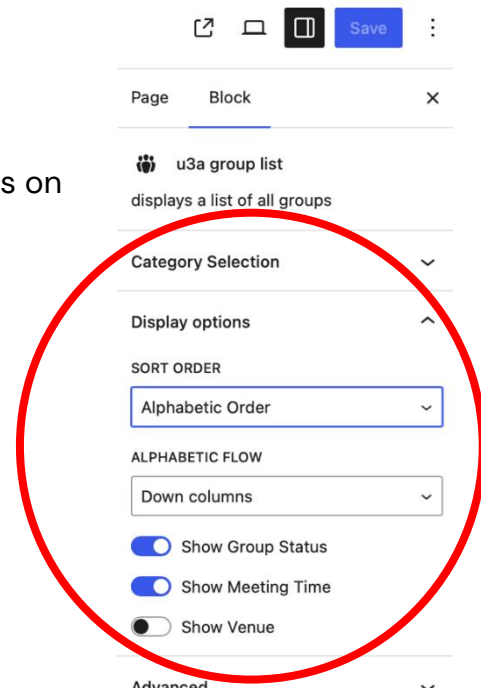
There are items that you can show or hide when displaying the groups list.

Navigate to your Groups page and select 'edit page'. Select the u3a groups list block (blue placeholder) as seen below.

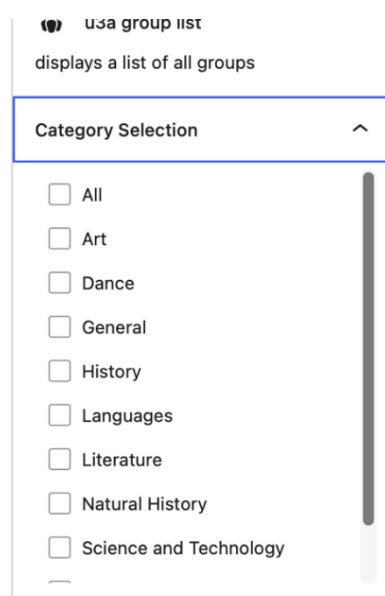


The u3a groups list block settings panel appears on the right.

Within the red circle in this block settings panel screenshot you can see Category, Sort Order, Alphabetical Flow, and three button options.



Category display options

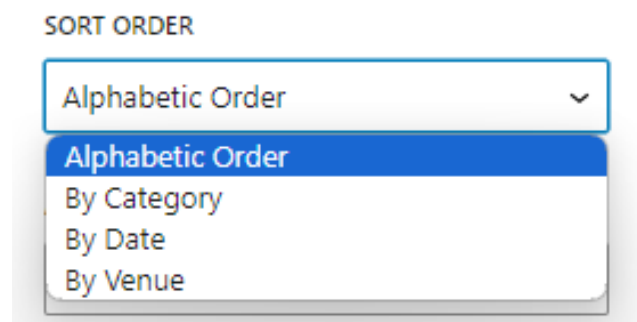


If you click on Category Selection you will be presented with a current list of Categories.

You can select the All, only one or more categories. The tick boxes control which items are shown in the list.

Sort Order

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.



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

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

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.

Groups listed alphabetically

[Art History](#)

on Monday evenings

[Landscape History](#)

on Wednesday mornings

Meets occasionally

[Walking Group](#)

on Wednesdays

[Computer](#)

Fortnightly on Monday afternoons

[Military History](#)

Meets occasionally. Please contact group

leader for information.

[Earth Sciences](#)

on Wednesday afternoons

[Photography](#)

Monthly on Thursday mornings

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.

Alphabetical
By category
By meeting day
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 occasionally

Science and Technology

[Computer](#)
Status: Active
Venue: [York One](#)
Fortnightly on Monday afternoons

[Photography](#)
Status: Active
Venue: [York One](#)
Monthly on Thursday mornings

Walking

[Walking Group](#)
Status: Active
on Wednesdays
Various times, usually once a month

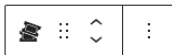
4b Events display options

Event display capabilities are flexible and allow variation in the page design.

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 the page containing the table of Events instead of having to go to u3a Settings. You have more layout choices. 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.

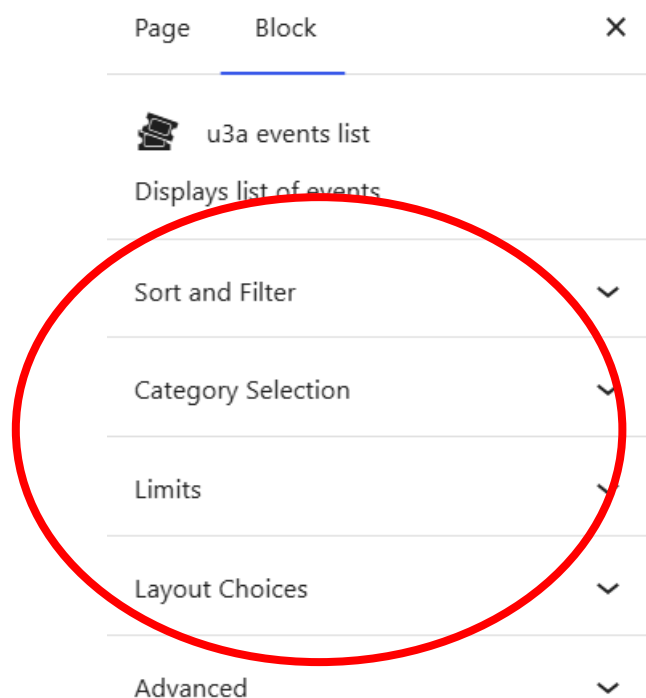
u3a events list block options

Edit the page that shows the Events you wish to modify.



This placeholder shows where a table of events will be shown.

Click the placeholder above that opens the block settings panel (right) shown below.



You can see the Sort and Filter, Category Selection, Limits, and Layout Choices drop-down menus within the red oval.

The expanded block settings panel is shown right.

Sort and Filter

'WHEN'

Can be Future or Past

'ORDER'

Can be Ascending or Descending

Category Selection has not been expanded as that is the same as for Groups, you can select 'ALL', one or more of the different Categories.

Limits

'SHOW GROUP EVENTS'

Can be:

Use the value set in 'u3a Settings'

Exclude group events

Include group events

'LIMIT NUMBER OF ENTRIES'

If set to default of 0, will show all qualifying events

'LIMIT NUMBER OF DAYS'

If set to default of 0, will show all qualifying events

Layout Choices

'LAYOUT' Can be:

Simple list

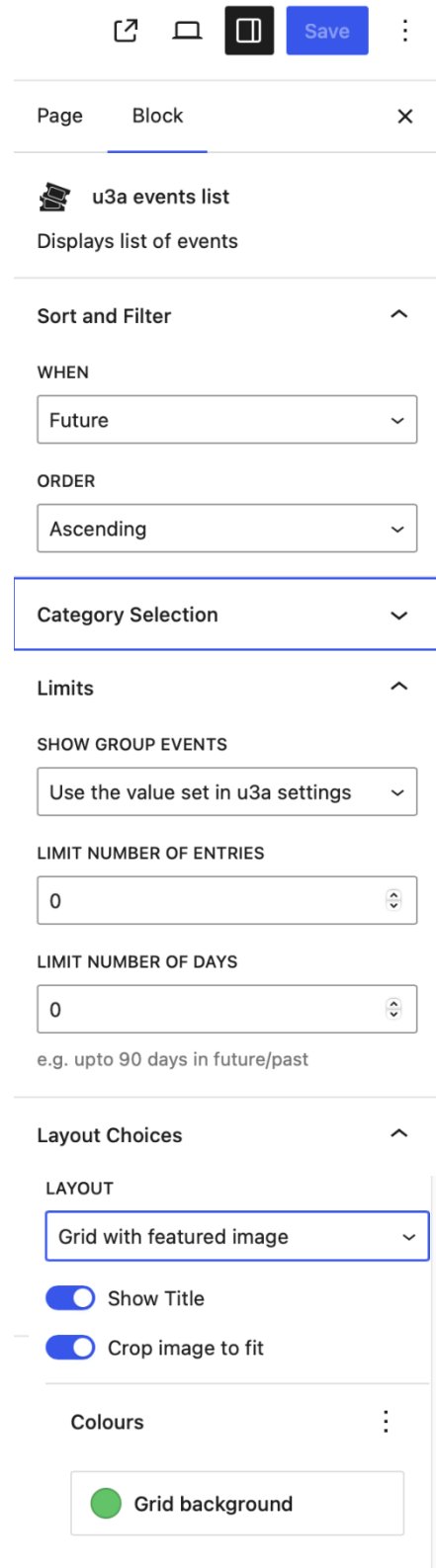
Grid with featured image

Single line date, time and title

In the case of the 'Grid...' A 'Colours' option will appear and an additional button will be available to 'Crop image to fit' – try it in WP Local.

Whether you choose 'Grid...' or another option, there is a button to 'Show Title' and if this is set, then a title of Previous Events or Forthcoming Events will be at the top of the list dependent upon the 'WHEN' setting.

If you deselect 'Show Title', then you will need to include your own fully customizable Title (heading).



Page Block ×

 **u3a events list**
Displays list of events

Sort and Filter ^

WHEN
Future v

ORDER
Ascending v

Category Selection v

Limits ^

SHOW GROUP EVENTS
Use the value set in u3a settings v

LIMIT NUMBER OF ENTRIES
0 v

LIMIT NUMBER OF DAYS
0 v
e.g. upto 90 days in future/past

Layout Choices ^

LAYOUT
Grid with featured image v

☒ Show Title
☒ Crop image to fit

Colours v

 Grid background

Here I have selected future events in descending order as an example and you can see that the list begins with the latest event rather than the next one.

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 coincide 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

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 last event, Anniversary Celebrations, doesn't have a featured image but the three earlier events do.

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.

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.

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.

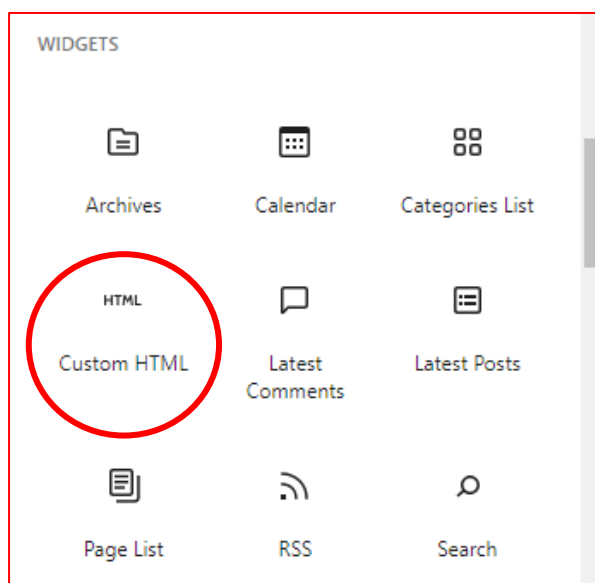
Section 5 – Advanced Applications

In this section you will find some additional editing applications that are more suitable for Administrators than other user roles.

You do not need to complete this section to run a basic website. Use it only if you want blogs, embedded calendars, or protected content.

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 another page in their u3a site or a different website. We might use this option to link to information about a local landmark or a forthcoming event. More detail on this can be found in the Editing Guide.



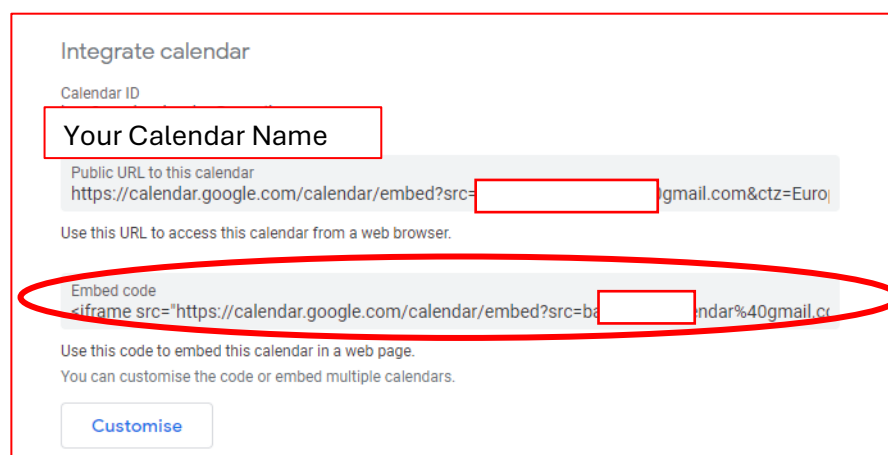
Another is an embedded link which displays the content directly on the page of your u3a site.

This uses a Custom HTML block.

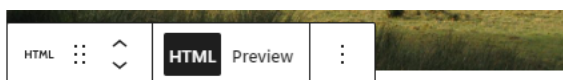
This will be of particular interest to any Administrators who wish to use an embedded YouTube video or Google calendar.

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

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 below.



Select the code, copy it, and paste it into the HTML block box as shown below.



```
<iframe src="https://calendar.google.com/calendar/embed?src=bau3awebscalendar%40gmail.com&ctz=Europe%2FLondon" style="border: 0" width="800" height="600" frameborder="0" scrolling="no"></iframe>
```

Save your changes and your calendar will be displayed 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.

Below is what the calendar looks like on a SiteWorks site, on a larger screen in landscape mode and a phone screen in portrait.

Today June 2023							Print	Week	Month	Agenda
Mon	Tue	Wed	Thu	Fri	Sat	Sun				
29	30	31	1 Jun	2	3	4				
Walking Holidays - Hotel Rendezvous - Skipton - N Yorkshire, Kelg 10am Garden Visits 2pm Italian			2pm Genealogy	9:45am Bridge		1pm Garden Visits				
5	6	7	8	9	10	11				
10:15am Spanish	1pm Drawing & Pai	10am 10-Pin Bowlin 10:45am Walking C	10am Walking (6-8 10am Strollers 6pm Theatre Visits	9:45am Bridge 10:15am Local Hist		11am Garden Visits				
12	13	14	15	16	17	18				
10am French 10:15am Reading 2pm Italian	10am Garden Visits 10am Committee M	10am String Band 10:45am Walking C 11am Poetry	10am Photography	9:45am Bridge		11:30am Sunday Lu				
19	20	21	22	23	24	25				
7:45am Garden Visi 10am Spanish	10am Monthly Mee 1pm Drawing & Pai	10:45am Walking C	10am 10-Pin Bowlin	9:45am Bridge		11am Garden Visits 1pm Garden Visits				

Phone Display

Today			June 2023			Print		Week		Month			
Mon		Tue		Wed		Thu		Fri		Sat		Sun	
29		30		31		1 Jun		2		3		4	
Walking Holidays - Hotel R						2pm Gen		9:45am B		1pm Garc			
10am Ga		10am Wa		10:45am									
2pm Itali													
5		6		7		8		9		10		11	
10:15am		1pm Dra		10am 10-		10am We		9:45am B		11am Ga			
				10:45am		10am Str		10:15am					
						6pm The							
12		13		14		15		16		17		18	
10am Fre		10am Ga		10am Str		10am Ph		9:45am B		11:30am			
10:15am		10am Co		10:45am									
2pm Itali				11am Po									
19		20		21		22		23		24		25	
7:45am C		10am Mc		10:45am		10am 10-		9:45am B		11am Ga			
10am Sp-		1pm Dra								1pm Garc			
										1pm Garc			
26		27		28		29		30		1 Jul		2	
10:15am		10am Wa		10am Str				9:45am B		2pm NO		11am Ga	
2pm Curr				10:45am				1pm Garc				12pm Ga	
2pm Itali												1pm Garc	
Events shown in time zone: United												+	

To embed a YouTube video, simply copy and paste the web address for it into a YouTube Embed or a shortcode block.

This is a good example to demonstrate the u3a SiteWorks support situation. The HTML and shortcode blocks are standard WordPress blocks that are available within u3a SiteWorks and so supported. When you embed something like a Google calendar you are embedding an external, third party object and, as with third party plug-ins that are not provided within the u3a starter site, they are 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 SiteWorks one.

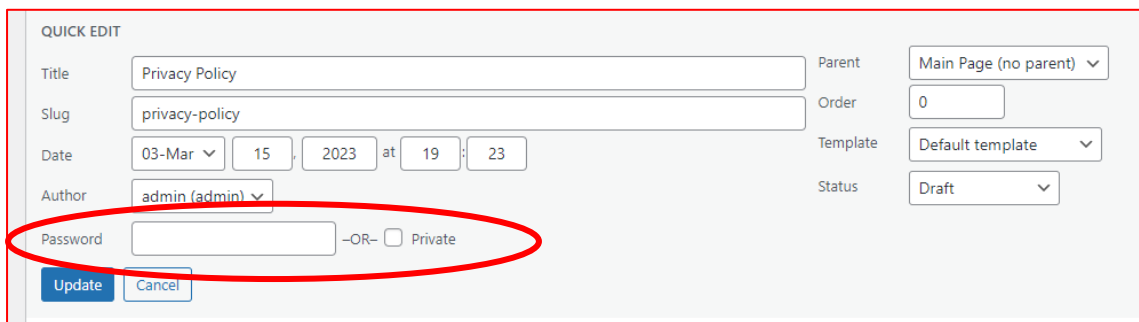
Note: Before embedding any content (like videos, maps, or social feeds) from external websites you should consider GDPR requirements. Embedded content can place third-party tracking cookies or collect visitor IPs. To be legally compliant, you must obtain explicit user consent before these embeds load.

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 Menu. Go to 'Pages' / 'All Pages' and select the Quick Edit option for that page.



Towards the bottom of the QUICK EDIT 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. It also means that you need to inform ALL

potential members of the password and update them all if it needs to be changed. Quite a task.

Various other scenarios are possible:

1. Upload documents to the Media Library, provide links to the documents on the password protected page. However, this is not protected as anyone with editing rights can access the library.
2. Store the documents on an external server, provide links to them on your password protected page. The person accessing the document would need the password for the page. This is more secure than 1.
3. External server stored documents can each be password-protected. Provide links on either a password protected 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 them, but not very easy for members.

Password protection is not just about securing information. All Users at all levels on your u3a site should be made aware of the password protection 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 computing action of IF (this occurs) THEN (do this). The result is a filtered list of blog posts on a page.

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).

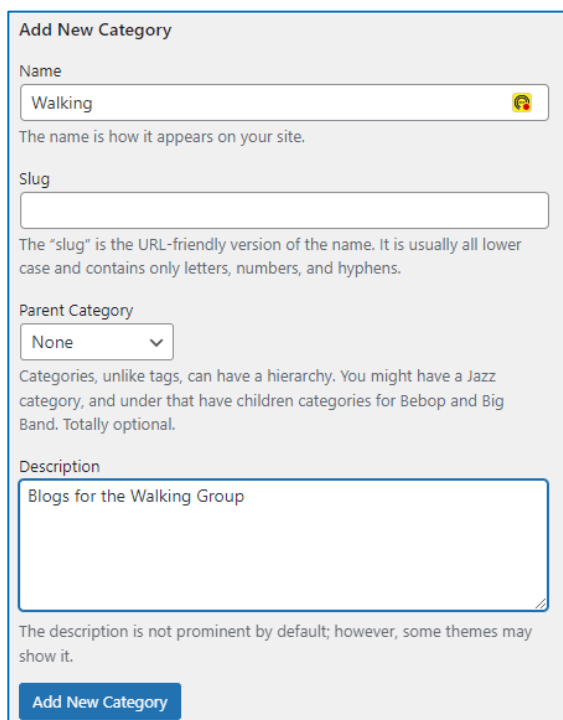
Category

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. It should be something that you and your Group Leaders will recognise for when they write their own blogs. I suggest you use your group names or a variation on them. Examples are: History group becomes History, the Long Walking group becomes LongWalk, and so on. 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 Menu and the Posts item, select Posts then you get the options shown right.



Add New Category

Name
Walking

The name is how it appears on your site.

Slug

The "slug" is the URL-friendly version of the name. It is usually all lower case and contains only letters, numbers, and hyphens.

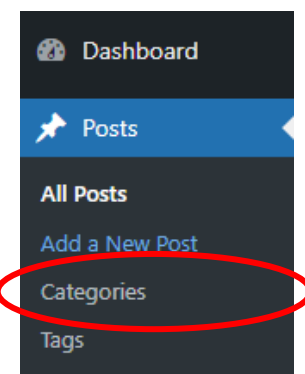
Parent Category
None

Categories, unlike tags, can have a hierarchy. You might have a Jazz category, and under that have children categories for Bebop and Big Band. Totally optional.

Description
Blogs for the Walking Group

The description is not prominent by default; however, some themes may show it.

Add New Category



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) add a description to remind yourself what it is for, as seen here left. The latter is optional. You don't need to add the slug. This URL will be added automatically by SiteWorks.

Click the Add New Category button to finish. You can create as many categories as you want to. When you view the category list you 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 then set one up now. In Posts, Quick Reference of the Editing Guide the graphic below reminds the author which sections to complete.

The screenshot shows the SiteWorks post editor interface. On the left, there is a text input field labeled 'Add title' with a red arrow pointing to it from a box labeled 'Add or edit title here'. Below this, a large red box contains the text: 'Click in this space to bring up the '+ new block' option then insert blocks of your choice for the main body of your blog'. To the right of the main editor area, there is a sidebar with various settings. A red arrow points from a box labeled 'Amend the publish date if necessary to put posts in date order.' to the 'Publish' field, which shows 'Immediately'. Another red arrow points from a box labeled 'Select the category associated with your group.' to the 'Categories' section, which has checkboxes for 'computer', 'photography', and 'Uncategorized'. The 'Tags' section is also visible at the bottom of the sidebar.

Create a new post if necessary or retrieve the sample you have already saved. On my real site I 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.

Admin Sample Blog

Lorem ipsum dolor sit amet, modus causae mea ad, nec an paulo omittantur, ei nec cetero indoctum gloriatur. No liber facete ponderum pri, mea cu tamquam quaestio reprehendunt, solum equidem duo no. Adhuc patrioque sed ut, pro ex solet tation instructor. Feugiat salutandi iracundia eu nec, sea meis inani id. Elit sensibus mea ad, ut suas noluisse luptatum vix. Lorem ipsum dolor sit amet, modus causae mea ad, nec an paulo omittantur, ei nec cetero indoctum gloriatur. No liber facete ponderum pri, mea cu tamquam quaestio reprehendunt, solum equidem duo no. Adhuc patrioque sed ut, pro ex solet tation instructor. Feugiat salutandi iracundia eu nec, sea meis inani id. Elit sensibus mea ad, ut suas noluisse luptatum vix.

The first photograph shows a large, ornate building with many windows and a central dome, surrounded by a well-manicured garden with hedges and trees. The caption below it reads 'The House from the Italian Garden'.

The second photograph shows a large, ornate building with many windows and a central dome, surrounded by a well-manicured garden with hedges and trees.

The third photograph shows a large, ornate building with many windows and a central dome, surrounded by a well-manicured garden with hedges and trees.

Return to your post/blog edit page

In the block settings panel at the bottom right, 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.

Categories

☐ computer
☐ photography
☐ Uncategorized
☒ Walking

[Add New Category](#)

Note that for the purpose of this guide I have already created a blog for this group and now that the category link has been made, I 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.

Walking Group

Walkers meet at the Lake car park at 10:00am to car share to the start of walks, which are approximately 4 miles long and are taken at a pace to suit the group. Please wear appropriate footwear and clothing.

At the end of the walk we usually go to a local pub for lunch.

New Walkers are welcome.





Status: Active, open to new members

Leader: [Mike Smith](#) Tel: 09876 543 211 or 07654 112 113 

When: on Wednesdays
Various times, usually once a month

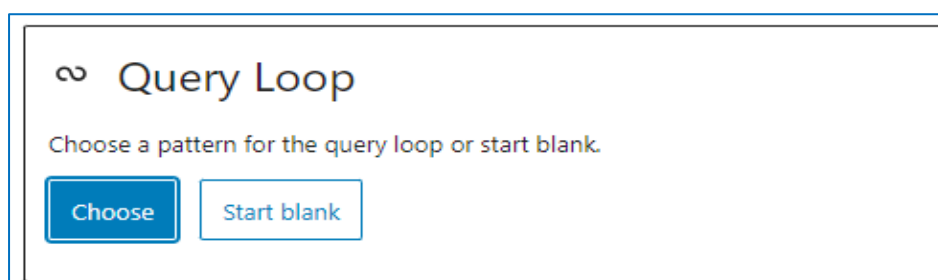


Recent Walks

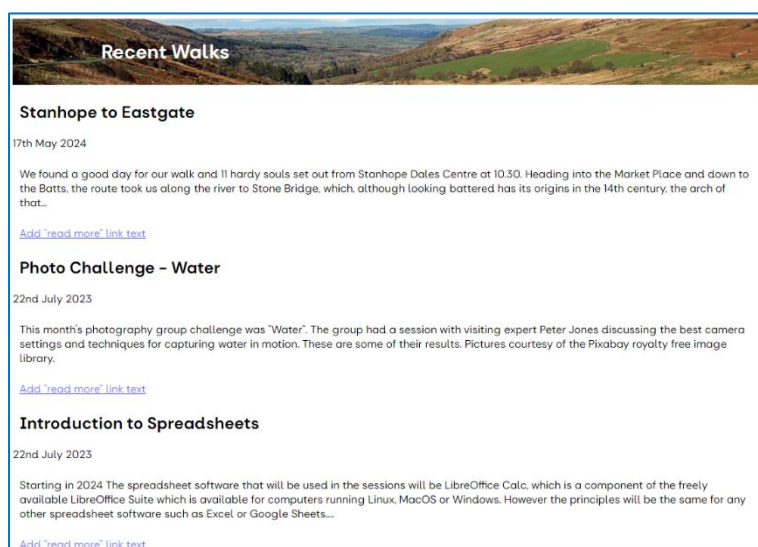
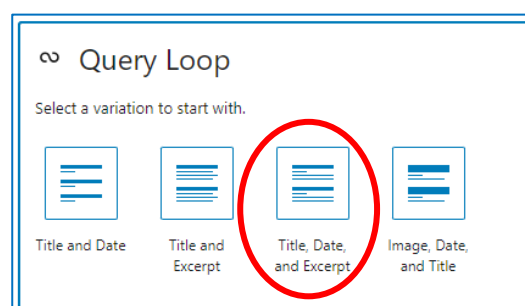
The blog(s) are going to appear below the group page and events information. I could just add them as a list but the page would look so much nicer with a heading for the blogs (Recent Walks for example). In this example I have used a cover block and added a countryside photo to complement the blog contents.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

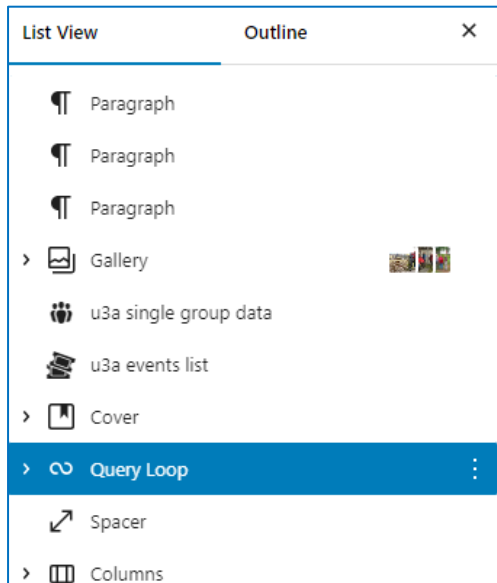
I insert a Query Loop block immediately below the heading and get this screen.



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.



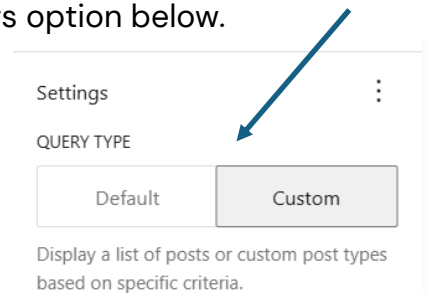
Tip: If there are already other Posts on my website then when I select Title, Date, and Excerpt then I could have a problem. The problem is that all Posts appear including the ones for the photography group and the computer group in the example here. I need to refine this so that only the Walking category 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 block settings panel (right of screen) for the Query Loop.

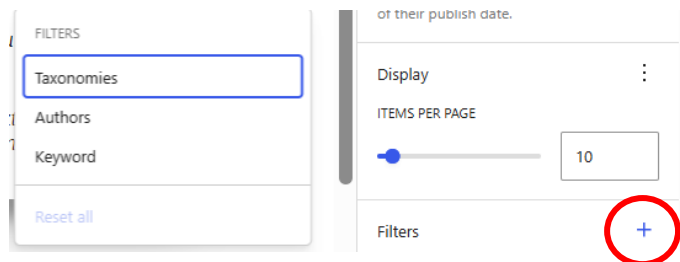
Change the Query Type to 'Custom' in the Settings option below.



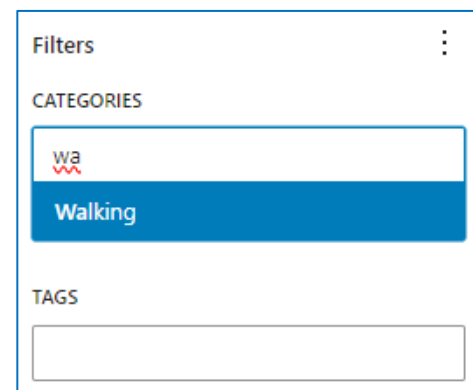
See the [User Guide⁸](#) about the additional options that open up in the block settings panel. For this simple example 'DISPLAY' of Items per page can be set.

Scroll down to almost the bottom of the block settings panel and click on the '+' next to 'Filters' (Circled). A pop-up menu appears.

I would expect to see the word 'Category' but instead I see 'Taxonomies'.

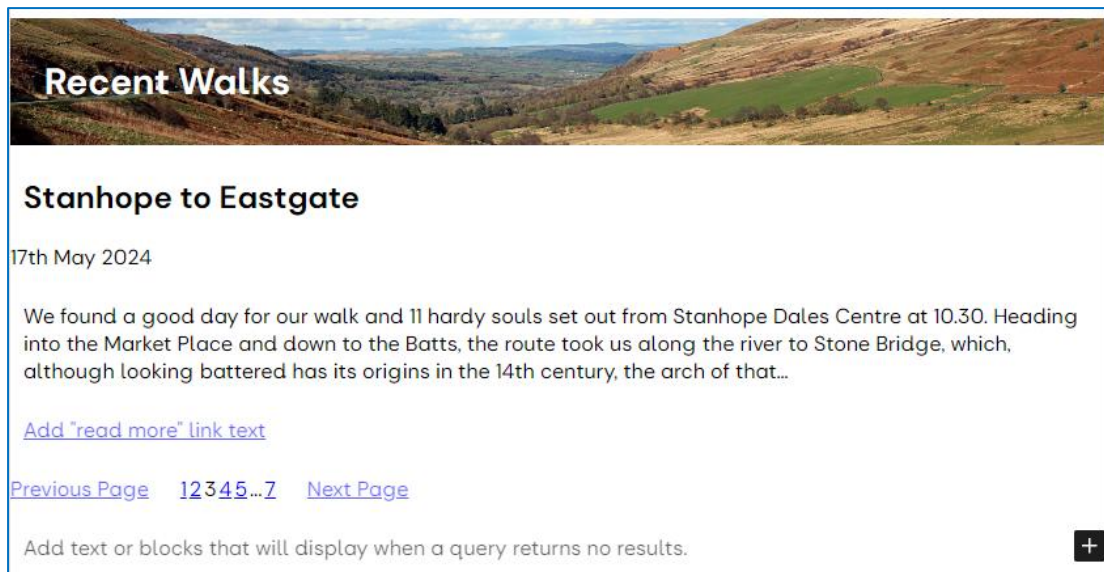


Select Taxonomies and now I see 'CATEGORIES'. I start typing Walking in the blank box but only get as far as 'wa' when the Walking category pops up. I select that.



⁸This link takes you to a page on the SiteWorks website with this information. See also Appendix A

Immediately the blogs/posts on the page reduce so that only the Walking Post is displayed as seen below.

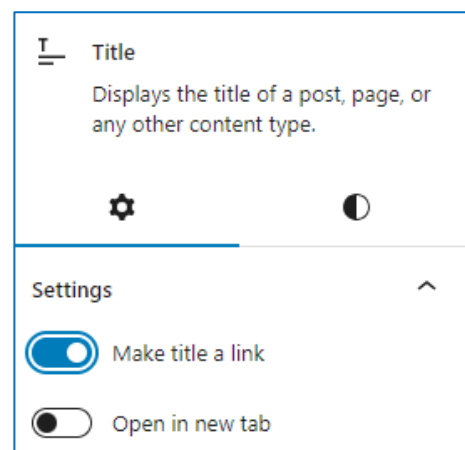
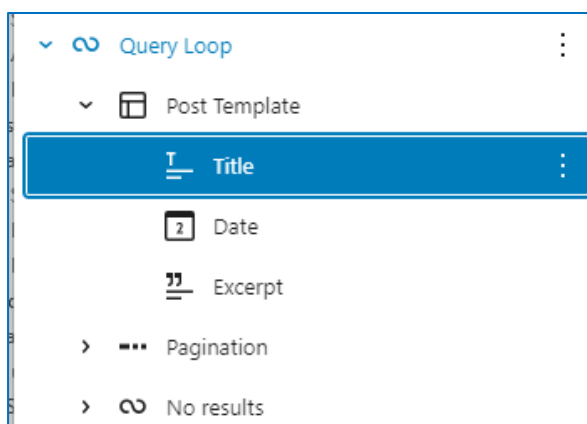


Success! Walking Posts are now appearing on the Walking Group page. The title, date, and an excerpt of the blog are now on display just as was set up in the Query Loop.

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 block settings 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

Select and insert the Cover block in the same way as you insert any block.

n.b. You will probably have to use search blocks to find it.



Gallery



Paragraph

HTML

Custom HTML

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 with 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.



Colour

☐ Text

☐ Heading

☒ Overlay

OVERLAY OPACITY

50

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 block settings 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.

FOCAL POINT



My Walking page now looks like this.

Walking Group

Walkers meet at the Lake car park at 10:00am to car share to the start of walks, which are approximately 4 miles long and are taken at a pace to suit the group. Please wear appropriate footwear and clothing.

At the end of the walk we usually go to a local pub for lunch.

New Walkers are welcome.



Status: Active, open to new members
Leader: [Mike Smith](#) Tel: 09876 543 211 or 07654 112 113 
When: on Wednesdays
 Various times, usually once a month



Summary of Advanced Applications

In this section we covered 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 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 third party plugins then you are directed to read the [Non-u3a Plugins Warning](#) and the recommended use of [LocalWP](#).

The Third Age Trust provides 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 plugin 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. **You may not save your own back-ups on the SiteWorks hosting server.**

Settings

This section outlines the u3a settings and the Standard Operating Procedures (S.O.P.s)

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

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

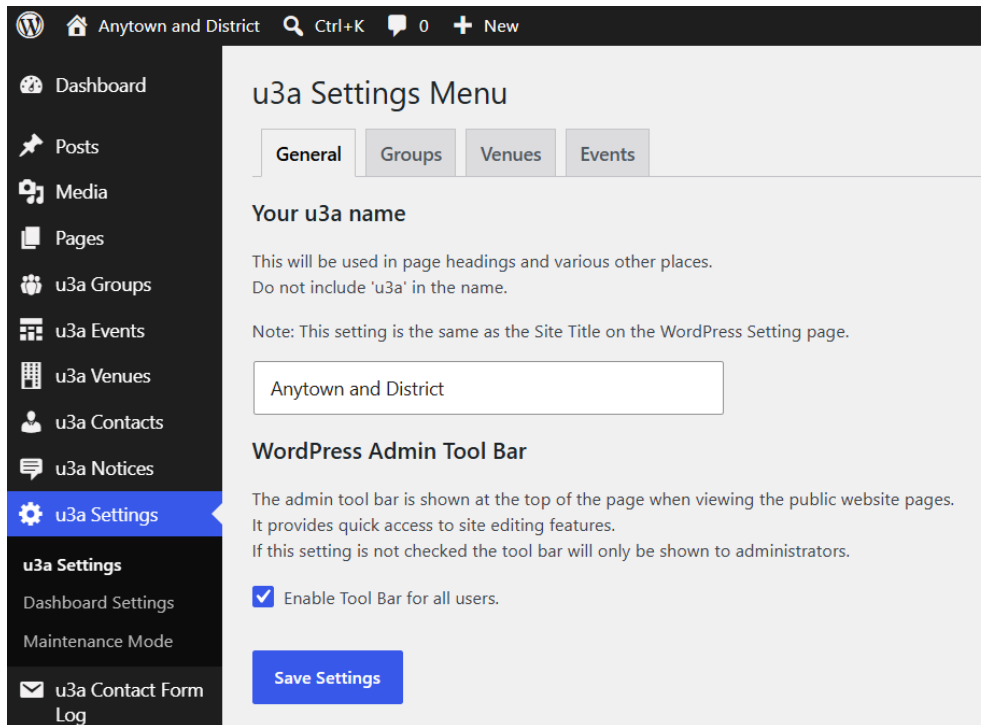
6a u3a Settings

Select 'u3a Settings' from the Dashboard Menu and you will get the screen below.

'Dashboard Settings' allow the Administrator to set a message for authors that don't see the level site information on the 'Dashboard' Menu item.

'Maintenance Mode' allows Administrators to set the site in a closed mode (tick box), set a message and image for visitors who will be told that the site is not open. A new Starter site will be in Maintenance Mode for private setup, and part of going Live is to untick this box. Occasionally a Web Manager may use Maintenance Mode if the site is undergoing major changes.

As shown above 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 displayed 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 Administrators 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 the term 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

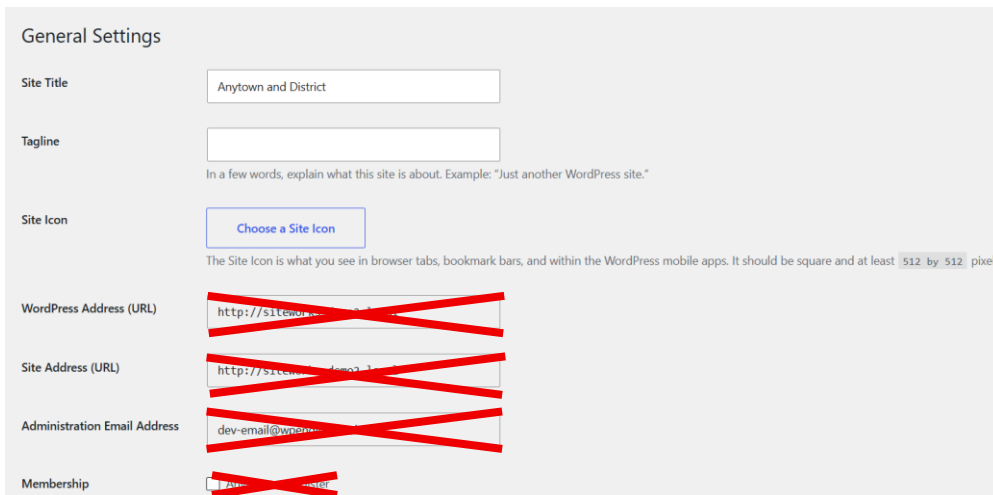
Group page, to list your groups alphabetically the system will change the list to category (or faculty) if the list is long. To prevent this, you need to set the maximum group list number to a number in excess of the number of groups that you have. 999 is usually enough. This is also the area where you 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 sent to the leader's address but the sender does not see this address.

3. The third tab is Venues, and it enables you to choose which optional fields appear. 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 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 in the example shown below.



General Settings

Site Title: Anytown and District

Tagline:
In a few words, explain what this site is about. Example: "Just another WordPress site."

Site Icon: [Choose a Site Icon](#)
The Site Icon is what you see in browser tabs, bookmark bars, and within the WordPress mobile apps. It should be square and at least 512 by 512 pixels.

WordPress Address (URL): ~~http://site.com~~

Site Address (URL): ~~http://site.com~~

Administration Email Address: ~~dev-email@wp.com~~

Membership: ☐ ~~Public~~

It is important that you read these and adhere to the rules.

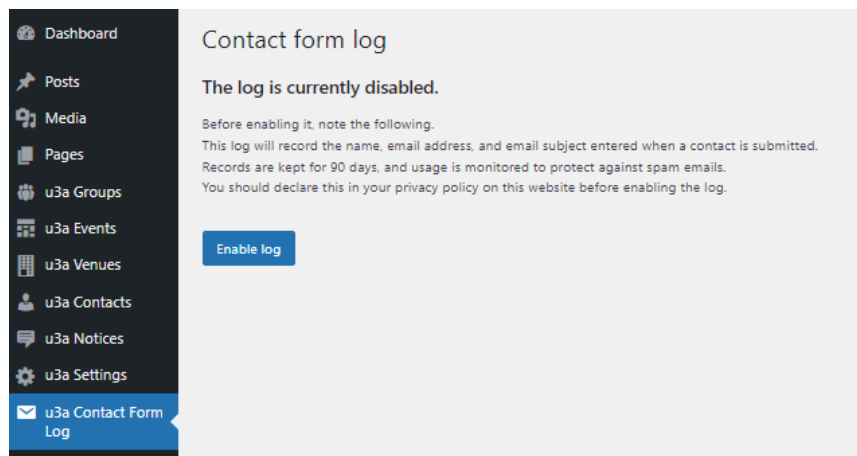
6c u3a Contact Form Log

The Dashboard Menu item, '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 or wishes to monitor email traffic.

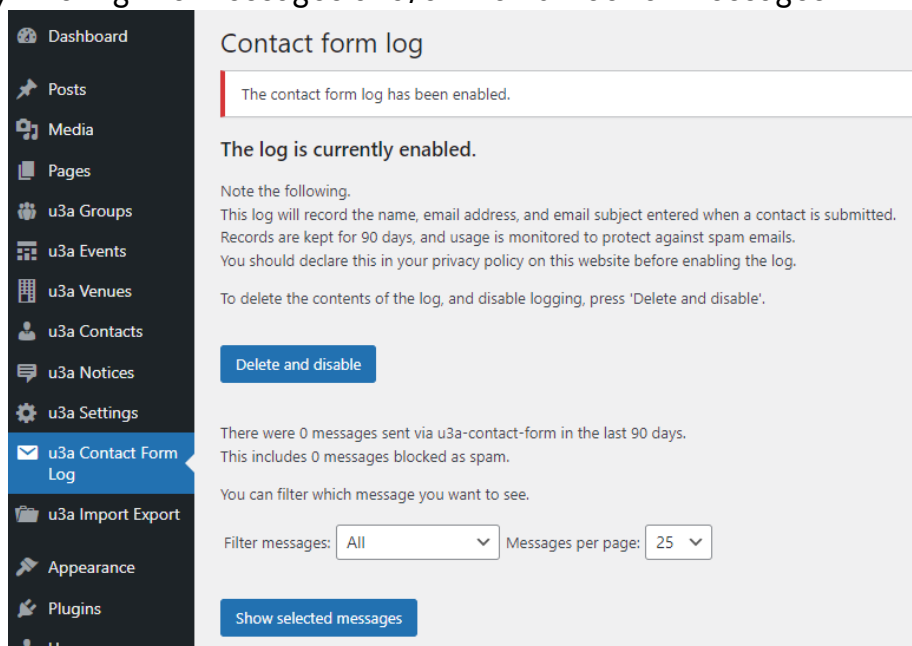
¹¹ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

Enable & Disable

Selecting the 'u3a Contact Form Log' from the Dashboard Menu you see the message shown below 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 Menu 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.

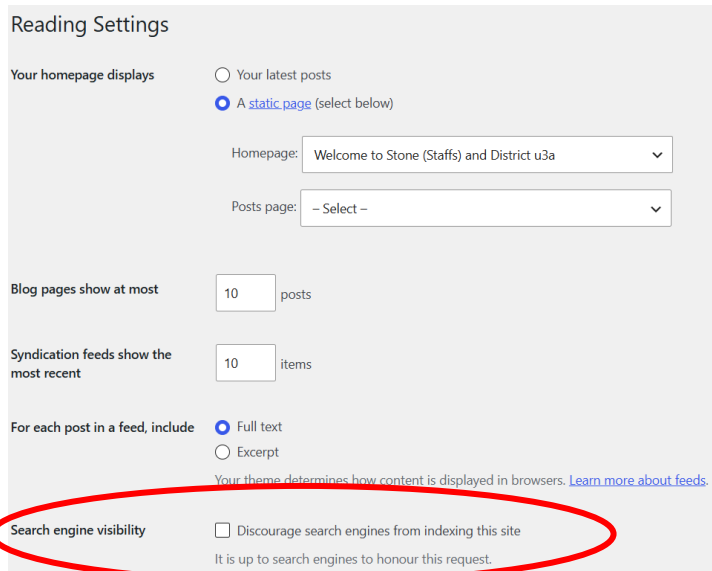
7a Settings

These are the WordPress settings you will see on your Dashboard Menu. 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.

For Starter sites the Web Manager will need in the 'Reading' item to untick the 'Discourage search engines' box when going Live. This is a one-time action.

General
Connectors
Writing
Reading
Discussion
Media
Permalinks
Privacy
Meta Field Block
Gutenslider
Imsanity



Reading Settings

Your homepage displays

☐ Your latest posts

☒ A [static page](#) (select below)

Homepage:

Posts page:

Blog pages show at most posts

Syndication feeds show the most recent items

For each post in a feed, include ☒ Full text ☐ Excerpt

Your theme determines how content is displayed in browsers. [Learn more about feeds.](#)

Search engine visibility ☐ Discourage search engines from indexing this site

It is up to search engines to honour this request.

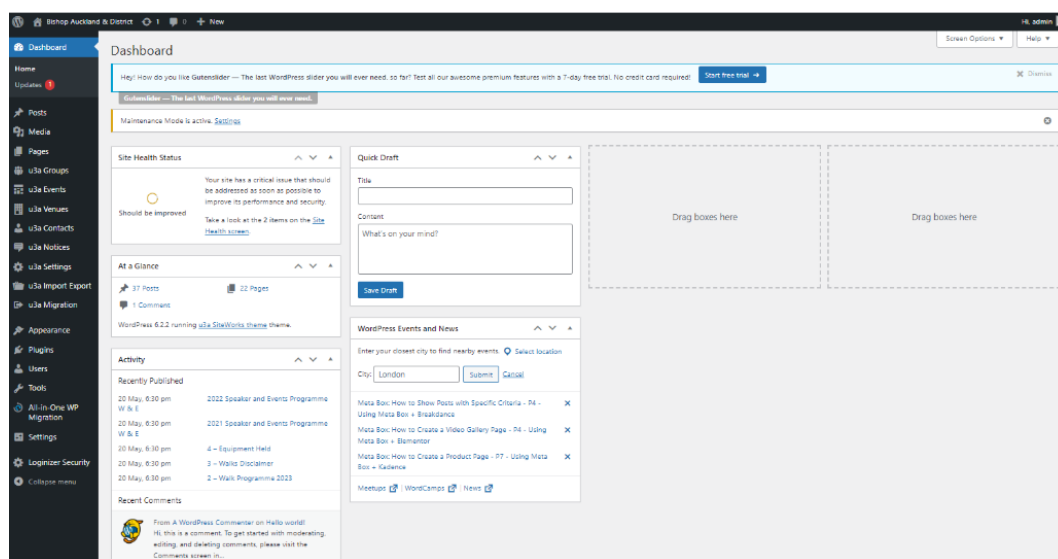
7b Tools

You access the Tools menu from the Dashboard Menu. 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 or the Help Desk can answer any questions you may have.

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.

7c Dashboard customisation

After 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:



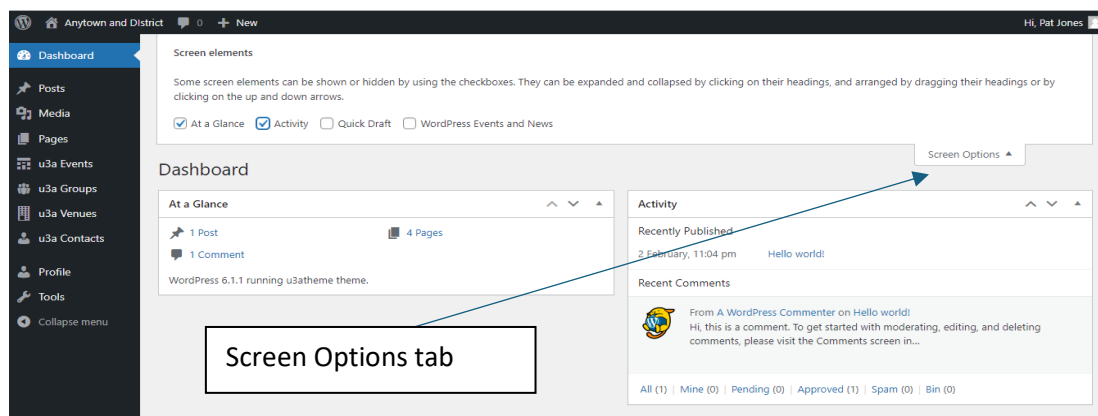
The Administrator can use u3a Settings to customise screens for other Users.

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 Menu items are reduced in line with the role access.

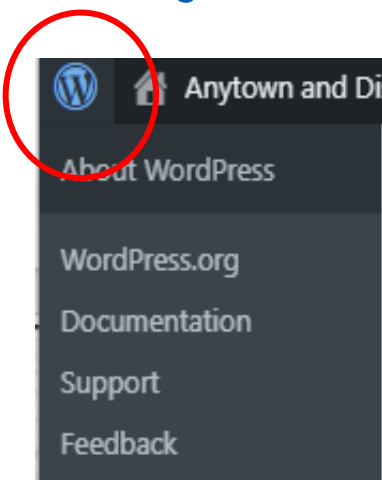
Customising the Dashboard screen

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 or hide on the Dashboard screen.



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.

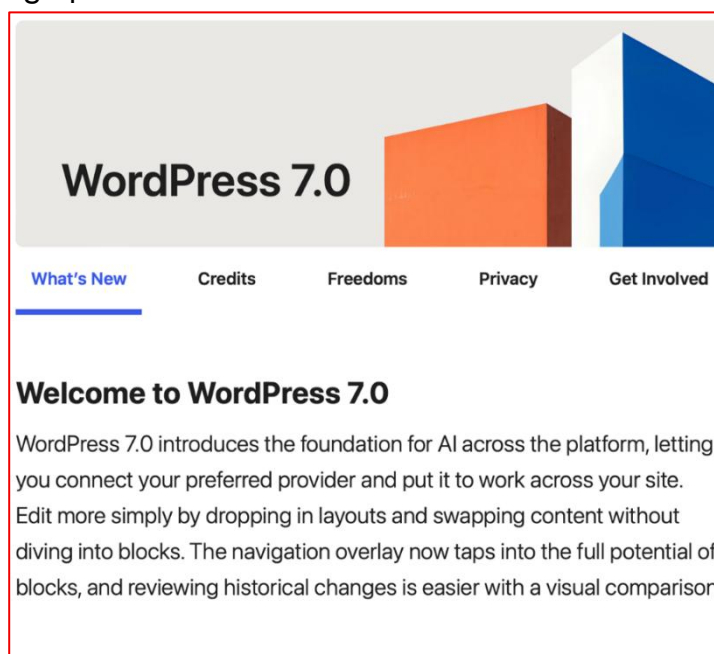
7d Getting WordPress screen help



Top left of the Dashboard is a WordPress icon shown here and circled in red. This appears on every screen. If you hover over that icon, you get a drop-down menu where you can select additional information. Clicking opens the Dashboard Menu.

'About WordPress' gives you a useful summary of what the current version of WordPress gives you as seen right.

'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 the u3a SiteWorks Team. This is not a Help Desk. **See the 'Where to get Help' section later if you want SiteWorks help.**

7e 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 users	Add /edit Groups, Contacts, Venues, Posts	Add New pages	Edit Own pages	Edit all pages	Add/Edit global events & Pages	Add/Edit All Group Events & Pages	Add/Edit Own Group Events & Pages
Admin	Y	Y	Y	Y	Y	Y	Y	Y
Editor	N	Y	Y	Y	Y	N	Y	Y
Author	N	Y*	N	Y	N	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' item can be found near the bottom of the Dashboard Menu. This is where you add details of people who need to have access to site editing. As the Web Manager this includes yourself as Site Administrator as well as additional Administrators, Editors and Authors which are created and modified here.

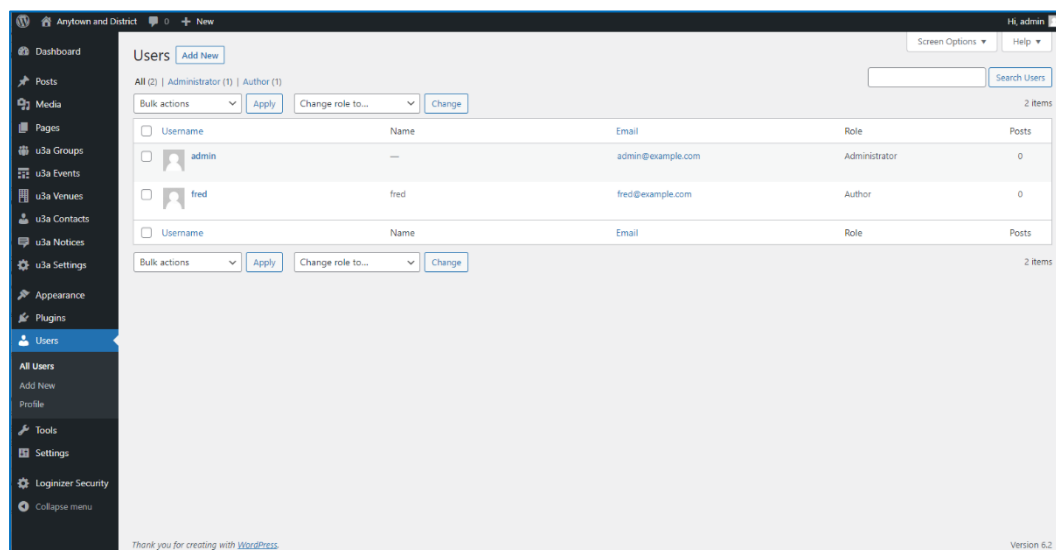
Tip: It is a good idea to set up a second Administrator logon for yourself for emergency use. It is not unknown for an Administrator to lock him/herself out of their site (see [Failed logins](#)) and having this second login provides a backup and perhaps saves some embarrassment.

*In the list of Users is '**SwDevAdmin**' and you might notice that you cannot delete or make any changes to it. This is by design as this is the SiteWorks Team 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 so use your site running in LocalWP or live site to view the detail.

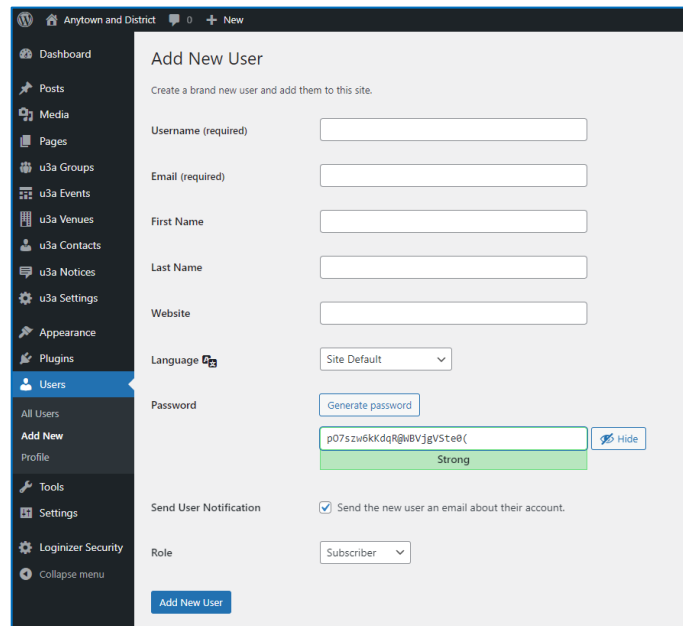
In this demo example clicking on All Users will bring up the page below. In this example only admin and one user have been added so far. If I hover over admin, I can see that the only options I have are 'Edit' and 'View'. Hover over Fred and I can 'Edit/Delete/View' or 'Send password reset'.



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 User' and the menu right is displayed. This is self-explanatory so you just complete the boxes.

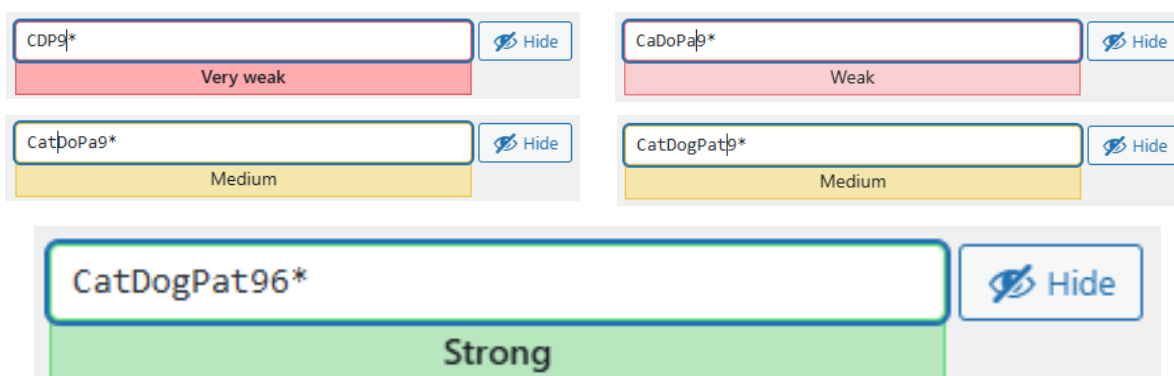
Passwords and logins are discussed in the Editing Guide but this section gives you a little more detail.



Set a password for the new user

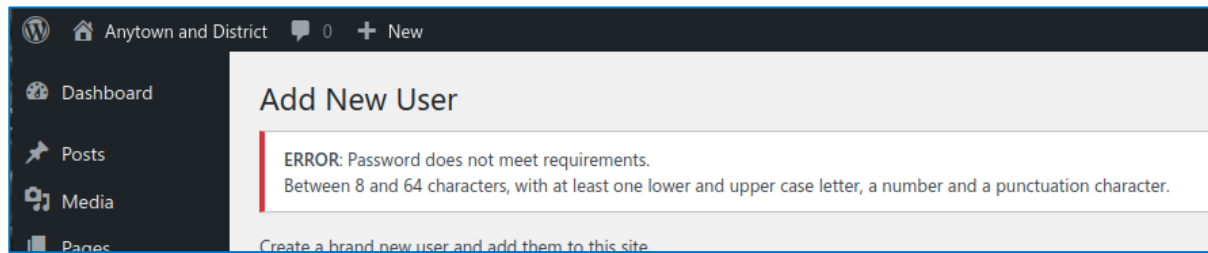
WordPress suggests between 6 and 24 characters for Username and Password but SiteWorks experience to date has shown us that some plugins require a strong password. We strongly suggest that all SiteWorks Users adopt strong Usernames and Passwords now to avoid future issues. Your username or password must 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 password must consist of 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.

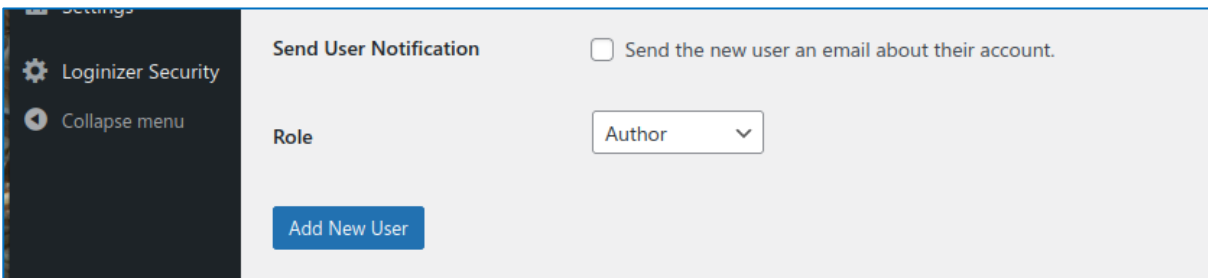


You may find what3words helpful when you to create passwords.

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 and your new user will now be shown on the list.

Please note that WordPress requires every user to 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 and create posts but cannot publish them. Like an Author they can also edit content where the content page has been put in their ownership, but they cannot publish such pages. 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

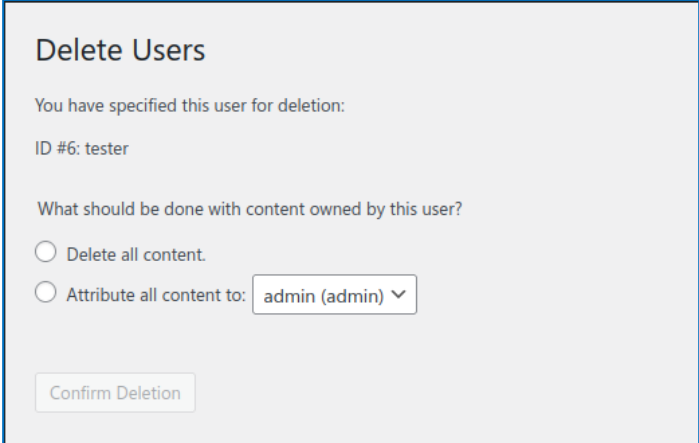
Occasionally Administrators report being unable to log in to their site. This happens when someone repeatedly uses the wrong combination of username and password. As a security measure the Loginizer plugin is designed to protect against password guessing bots, so will lock any account after 4 failed 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 Menu 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 to 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) ▼

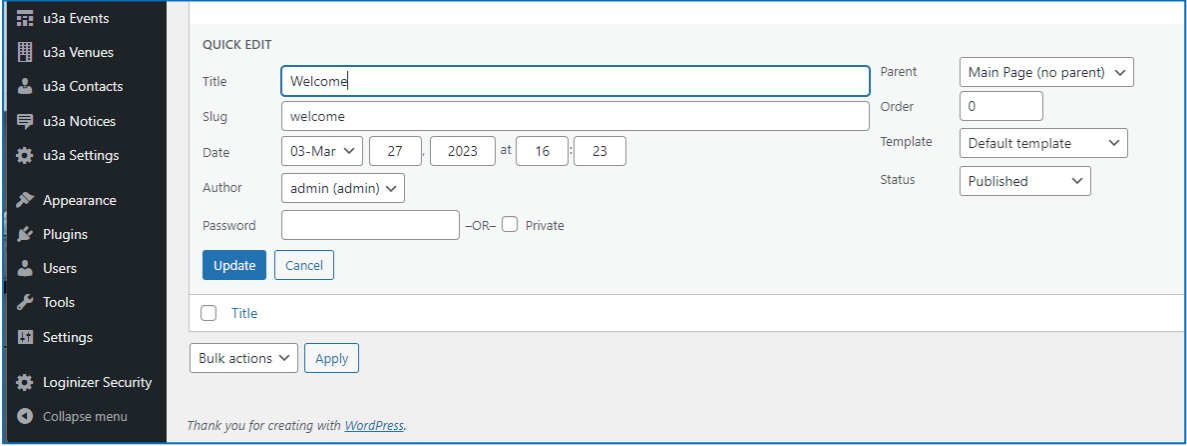
Confirm Deletion

7f Quick Edit and access rights

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

¹² This link takes you to a page on the SiteWorks website with this information. See also Appendix A

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.



On the Dashboard Menu; 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 users 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.

¹³ This link takes you to a page on the SiteWorks website with 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.

[Access the u3a Migration Training page here](#)

General WordPress Training



Here are some general WordPress resources help with general WordPress features:

- [Easy WP Guide](#) – A good up to date source. The aim is “to create a simple WordPress manual that will help you to get an understanding of how you use the various features within the WordPress Dashboard to keep your site or blog updated”.
- [Learn WordPress](#) – The official WordPress repository for tutorials. Not recommended as a starting point as it's not organised in a way that introduces topics in a logical order for beginners. But it does contain useful material if you are looking for a guide to a specific task.
- [W3Schools WordPress Tutorials](#) – Written for a more technical audience than the Easy WP Guide.
- [WP Beginner – Beginner's Guide to WordPress](#) – The WP Beginner website is a good resource, though this guide contains some material on arranging hosting and installing WordPress that is not really relevant and can be skipped.
- [WordPress Gutenberg – The Ultimate Guide](#) – a comprehensive video guide to the ‘Gutenberg’ page editor which is used for creating page content in WordPress.
- [Gutenberg WordPress Tutorial](#) – another video introduction to the ‘Gutenberg’ page editor. You may want to skip the second half of the video (from about 16 minutes in) which covers add-ons to the standard WordPress features.
- [WordPress tutorials from Inmotion hosting](#) – over 800 tutorials many written for beginners. A good section on using the WordPress Gutenberg editor.

Theme developed by u3a SiteWorks team

¹⁴ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

Section 9 – Where to get Help

The SiteWorks Guides are foundation level documents that cover 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 they cannot answer your question then they 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. Details of the Zoom call will also be communicated prior to each session to all Web Managers and their Assistants in our records.

There is a [u3a WordPress Development Forum](#)¹⁶ that deals with more advanced topics that you can join.

The SiteWorks website offers a wealth of information, including background, news and bulletins, resources for Web Manager's, 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 via Search Engines.

¹⁵, ¹⁵ This link takes you to a page on the SiteWorks website with this information. See also Appendix A

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, the page containing the links is referenced 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
- Maintenance Guide
- u3a Privacy Policy pro-forma
- Guide to your SiteWorks Journey (Go Live Checklist)
- Learn WordPress links
- Website Security, Back-ups, etc...

Links for the Editing Guide

- User Guide (same as above)
- SiteWorks Introduction videos
- Help Desk
- WordPress Development Forum

As well as the references above, this site has further useful information including how to update a Web Manager's details (see Start here) –

<https://siteworks.u3a.org.uk/>

Appendix B – LocalWP and the u3a demo file

LocalWP, Demo zip file, WordPress and Third Party Plugin 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 SiteWorks SysAdmin team uses Local for this purpose before testing in a live server environment.

Plugin updates for your Live or LocalWP site can be installed automatically or user controlled. During the learning process when we are using LocalWP and the demo site we also need to ensure updates are made.

SiteWorks supported plugins have auto-updating disabled. This can be verified by listing all plugins, Plugins > Installed Plugins and looking at the rightmost column headed Automatic Updates. The blue text should read 'Enable auto-updates' meaning auto-updates are **NOT** enabled. SiteWorks supported plugins update automatically by the SiteWorks team once checks and testing have been completed.

For unsupported third party plugins the Web Manager is responsible for verifying the suitability and implications of updating a plugin.

Unsupported third party plugin updates have become more frequent because of security updates – a general Internet trend. A significant number of sites are not updating (or removing) unsupported plugins on a regular basis.

The Sysadmin team send out advisory emails and have updated plugins in cases where security is a concern. This is an administrative overhead. For these reasons the advice is to enable auto-updates for unsupported third party plugins.

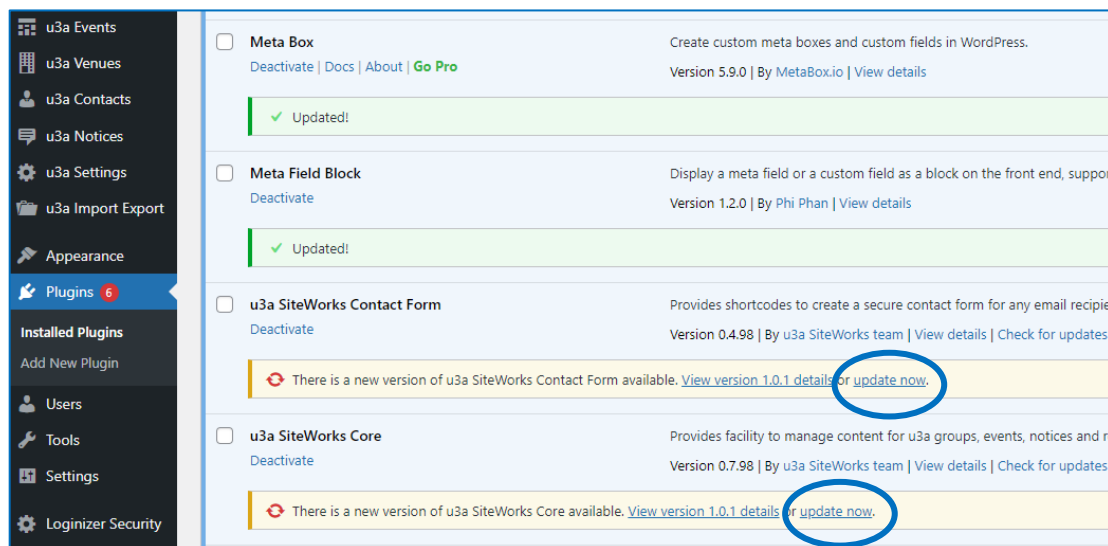
Plugins that are tested and managed by SiteWorks should be set as '**Enable auto-updates**' (i.e. auto updates disabled) they are:

- those starting 'u3a',
- GutenSlider, Independent Analytics, Imsanity, Lightbox for Gallery & Image Block, Loginizer, Meta Box, Meta Field Block and MainWP Child.

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 the program 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 Menu 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. 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.