u3a site works Group Author Guide

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This document is based on one written by Hale u3a to meet their specific needs.

1 Introduction

This document aims to help Group Leaders and Coordinators manage their Group(s) information that appears on their SiteWorks website. It attempts to cover the bare minimum with some examples of how to enter or amend text and pictures.

Please note these general points:

- Be aware that anything you add to your page is public over the internet.
- Don't include personal information (names, phone number, email addresses etc.) without permission from the person concerned.
- Make sure that any pictures added are not subject to copyright.

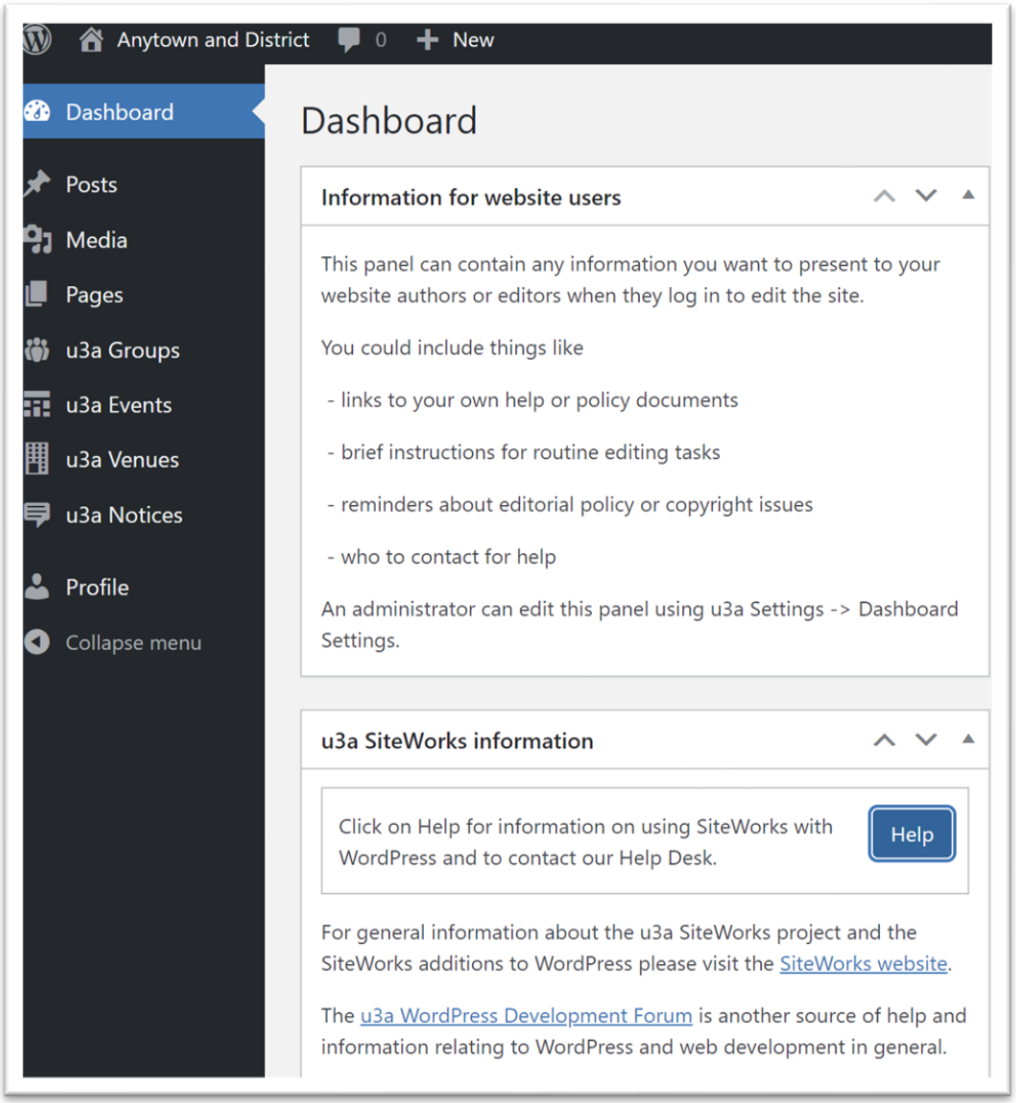
2 Logging in and Initial Screen

You will be given a username and password by your Web Manager.

The initial password screen at https://**anytown**.u3asite.uk/wp-admin/ where anytown is replaced by your site's name (technically this is called a subdomain name).

There is a **Lost your password?** option that will send you a password reset email.

Once you have logged in you will see the WordPress/SiteWorks dashboard:



The contents of the **Information for website users** panel will be different if your Web Manager has edited it with a specific notice for updating your site.

The Dashboard menu starts in the top left corner.

	This icon can be ignored. It opens a WordPress menu and navigates to system version information.
Anytown and District	View the current website home page. Click on it again to return to the Dashboard menu.
Posts	An advanced way to add articles for your group. Not explained here as there are SiteWorks ways to do this called u3a Events.
Media	All photos and documents for the site are stored here. Do not upload videos. You can Add (and delete only those) and use All. The documents can be Word, Excel, PDF etc. PDF files are regarded as universally readable so use where possible.
Pages	These are the site's general pages. You can only edit these when created by and given permission to by your Web Manager, but not to delete.
u3a Groups	This is where you will find your Group pages. Your Web Manager will be able create and/or to give you author rights to one or more groups, but not to delete.
u3a Events	Events are associated with a specific date and time. Any event you create will be associated with a Group you manage. How to setup events is covered in 5.8 Add an Event to your Groups Page.
u3a Venues	These are venues you can associate with your group(s). If a venue needs to be added contact your Web Manager.
u3a Notices	These will be general notices and news items for your site. If your group needs to communicate a last minute change or make an announcement ask your Web Manager to put a notice here.
Profile	Various personal settings including changing your password.

3 Changing your password

You should have been given an initial strong password because SiteWorks doesn't use a 2-step verification login. If you decide to change your password then select **Profile** from the Dashboard menu and scroll down to **New Password**. Don't forget to click **Update Profile** at the bottom when done.

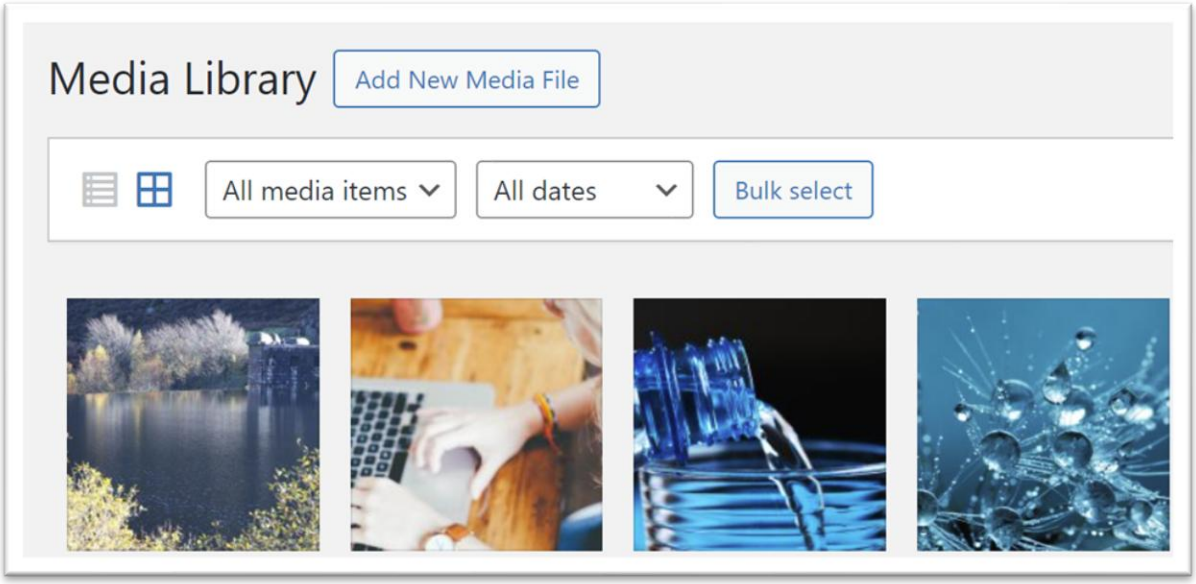
There is password recovery and your Web Manager can change your password if necessary.

4 Media Library

Click on **Media** and you can see all the photos (also referred to as pictures or generically images) and documents that have been loaded to your site.

You can load images and documents into the Media Library, but you can't delete any unless you have added them, but check first with the Web Manager if they have been used in other places.

The drop-down that by default shows "**All media items**" can be set to "**Mine**" to show only files you have uploaded. This can make it a lot quicker to find your own images.



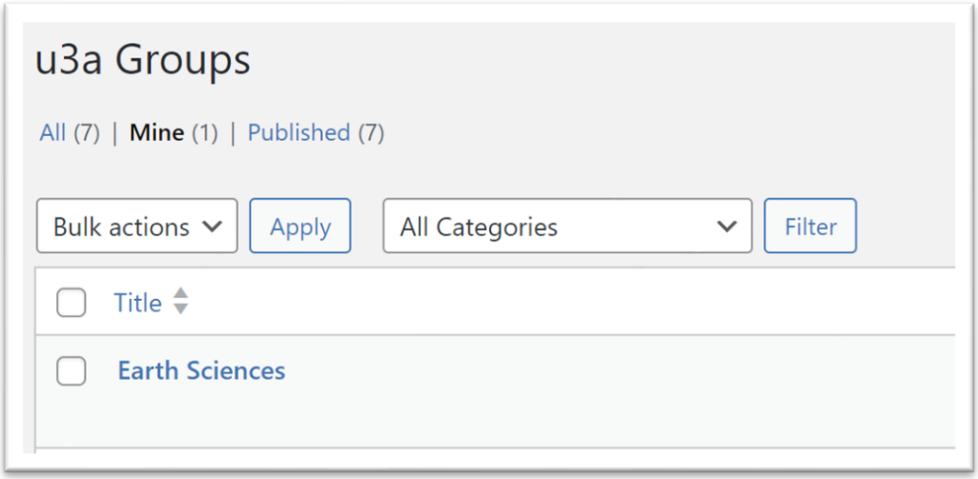
Use **Add New Media File** and either select the file from your computer or use drag-drop.

How to use a media file on your Group page is described below in 5.4 Adding a Picture image.

The u3a Brand Centre https://u3abrand.org.uk has images you can use (you need to register). Look under Image Library. There are also some small icons on the SiteWorks site https://siteworks.u3a.org.uk/u3a-siteworks-training/icons-for-your-site

5 Editing your Group Information

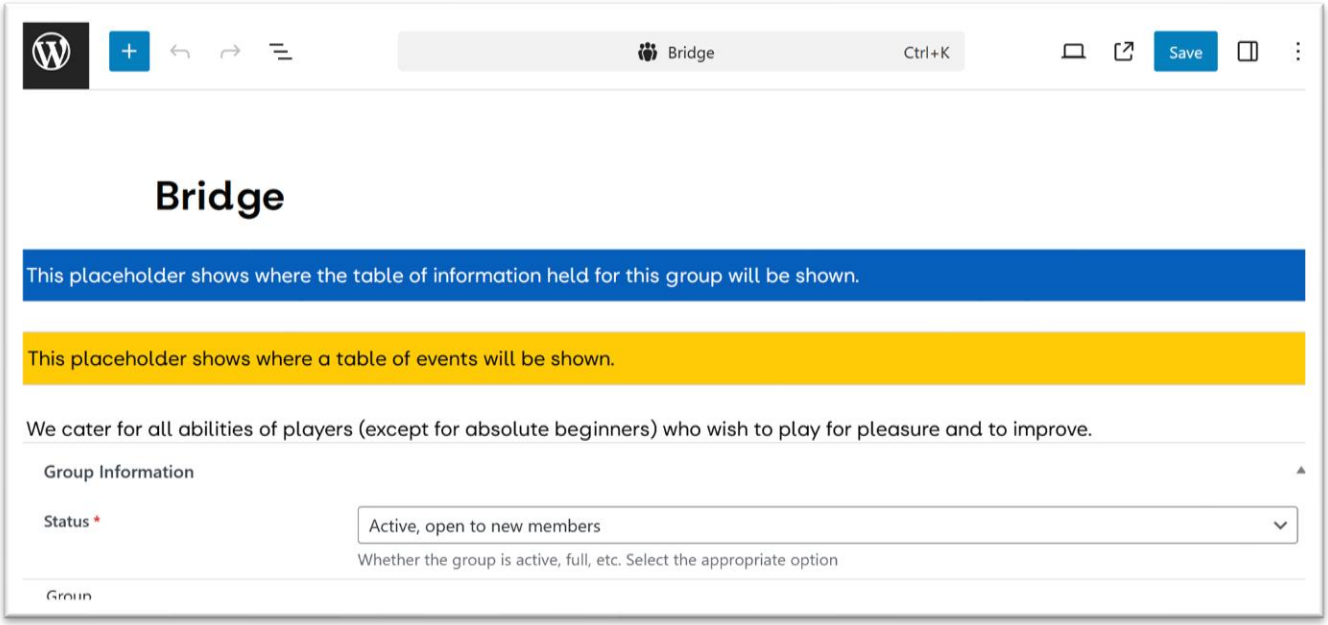
Select **u3a Groups** and you will see the groups that you can edit. Use the filters **All, Mine** and **Published**:



Click on a Group name or hover over it and select **Edit.**

Quick Edit is for the Group properties and used by the Web Manager.

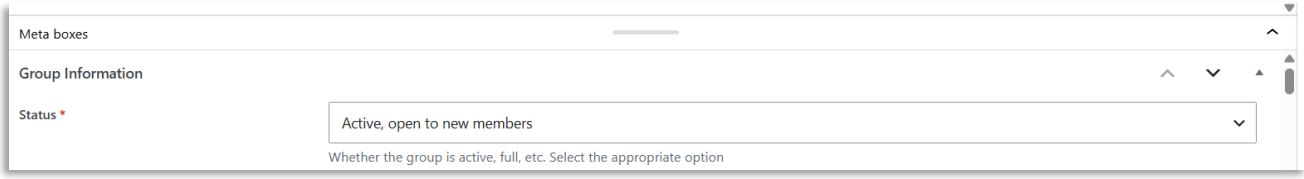
You will see something like this Bridge Group example:



Ignore (but don't delete) the blue and yellow placeholders. Below them is text that gives a general description of the Group (see 5.2 below for how to edit this).

5.1 Group Information Form

Group information is entered on the form (Meta boxes) at the bottom of the screen starting with Status.



You may not see the Meta boxes area at first and there are ways that allow you to see it and switch between the Meta boxes and the body of the Group Page.
You can use the below controls to expose the Meta boxes.



Click on the "line" and drag it up
or click the open space either side of the line.

click on the "upward arrow"

Doing these actions will expose the text boxes that you can complete and will also expose a small upward pointing triangle on the right.



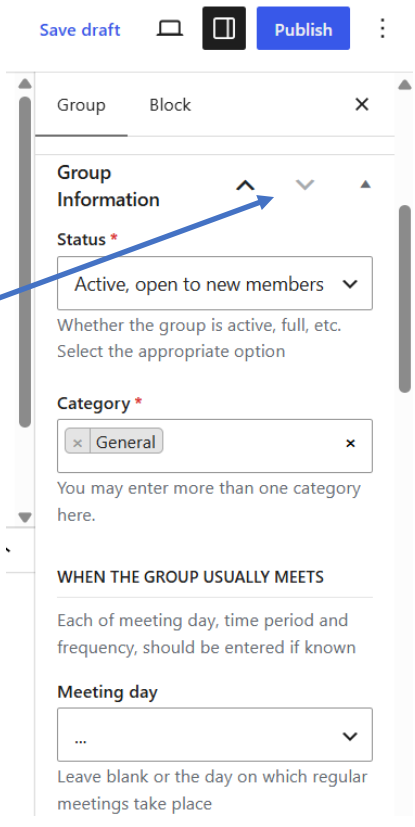
In addition, it sometimes (but not always) exposes a pair of arrow heads
(1 pointing up and the other pointing down.)

The upward triangle indicates that the text boxes 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)

This will allow you to enter the data whilst still viewing the Group body information.

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

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



The form has these elements:

Status (required)	Select from the dropdown
Category (required)	Select from the dropdown. Your Web Manager can add categories if necessary.
The following are optional	
Meeting day	Dropdown
Time period	Dropdown
Start and End time	Select times
Frequency	Dropdown
When – additional text	e.g. '1st and 3rd week', 'We meet on bank holidays'
Venue	Dropdown. Your Web Manager can add venues.
Group Leader and Leader 2 *	Dropdown This may read Convenor, etc. as configured by your Web Manager
Primary (Secondary) group email *	If you have non-personal email address(es) for the group
Cost	Text field

*	If you change these entries do consult with your Web Manager and Group Coordinator as this information may need updating elsewhere e.g. the Beacon membership system or a master spreadsheet. These fields are also contacts so you may need to add contact details (described below)

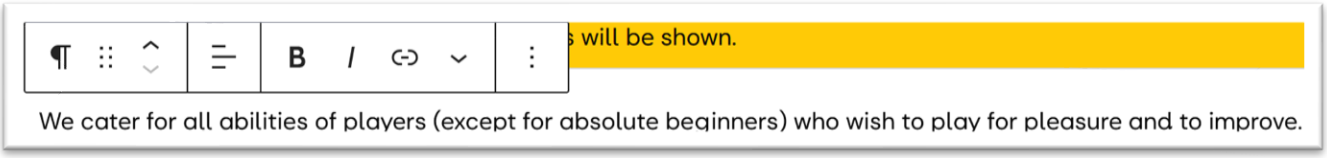
5.2 Changing the descriptive text

The descriptive text in the Bridge example above reads:

We cater for all abilities of players (except for absolute beginners) who wish to play for pleasure and to improve.

This text lives in what WordPress calls a 'block'. Blocks are used to place content on a site's page, such as text and pictures. A block that just has text is a Paragraph block.

To edit the text, click on the text and a toolbar pops up. This pop-up toolbar can be moved to the ribbon at the top of the page (see section 6 Additional tips for how).

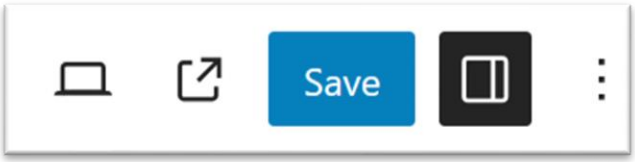


You can now edit the text in the usual way (type, delete key, select and delete, etc.)

The block pop-up toolbar for a **Paragraph** block offers the following:

¶	Is an advanced feature to transform the paragraph to another type of block
⋮⋮ ^ v	These controls let you drag (six dot) or move (arrow) the paragraph up or down the page
≡	Align the paragraph (left, centre, right)
B *I*	Make text **bold** or *italic* or even ***both***
🔗	Insert, amend or delete a link. Described below.
⌄	Opens a drop-down menu with further formatting options. Most useful is probably the Highlighter to highlight text
⋮	This is available on all blocks and opens a sub-menu. Most useful are Duplicate (the paragraph), Add before and Add after (to add a new block such as another paragraph). Also note Delete at the bottom.

To keep your edit, click on Save:



The icon enables to see what your page looks like to site visitors on a computer, tablet or mobile.

The icon on the right opens the Settings menu for the block and Group. This includes additional advanced formatting controls.

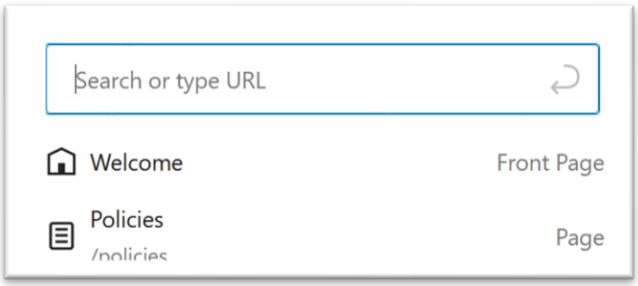
5.3 Adding a link

A link can take the user to a new page on your site or to an external website on the internet via its URL / Web Address. It can also reference media, usually a document. In a paragraph a link is applied to some selected text.

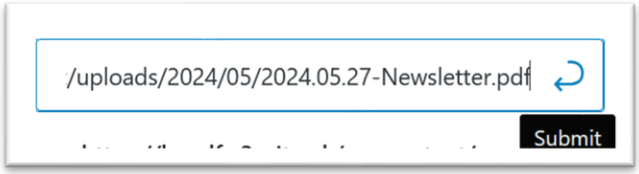
To link to a document in the **Media library** then from the Dashboard menu open the **Media library** and click on the document. On the pop-up screen click **Copy URL to clipboard** (usually the bottom right, scroll down if necessary).
Click the **X** on the top right to exit the selection pop-up.

If the link is external then **copy the URL to the clipboard**. Include the " https:// " part.

1. Now go to the Page, Post or u3a Groups etc. to edit, and select the text that will become the link. Click the on the pop-up toolbar.
   This will open a URL form:



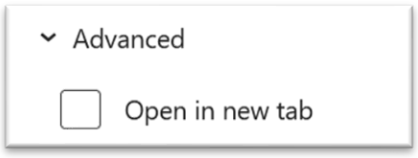
2. Paste the copied link into the box and submit by clicking the circular arrow on the right (note that searching does not find documents):



3. The link is now in place.



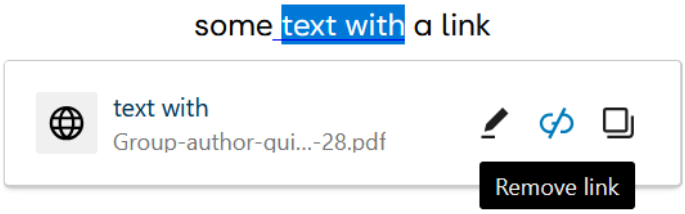
4. When linking to documents it is generally best to open them in a new browser tab. To do this click on the pencil icon and then check the **Open in new tab** tick-box before saving.



To replace a link then clear it first and create it again.

To clear the link, select the text and click on the link icon on the pop-up toolbar, it will have a black background indicating a link is present

This opens the link menu where clicking clears the link.



Now create a replacement link as described above.

You can also use the **Buttons** block to create a button with a link.

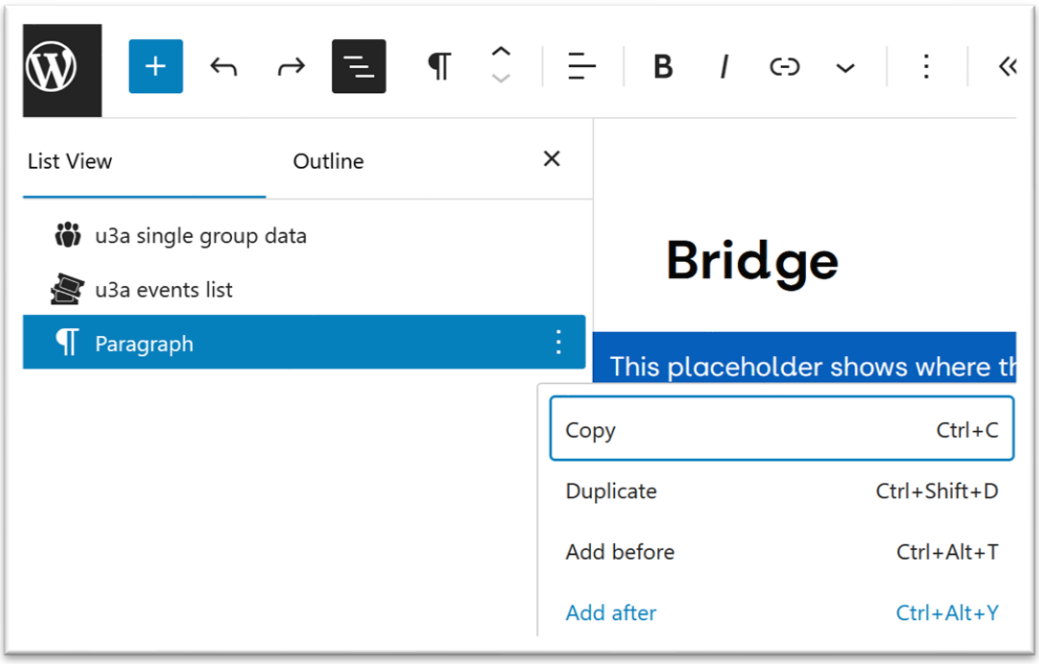
Latest Newsletter

See 6.2 Buttons for how to do this.

5.4 Adding a Picture image

The most basic way to include an image is to use an image block. There are different ways to select where to place new blocks, the method described here will be the best for getting started as it helps display clearly what is going on.

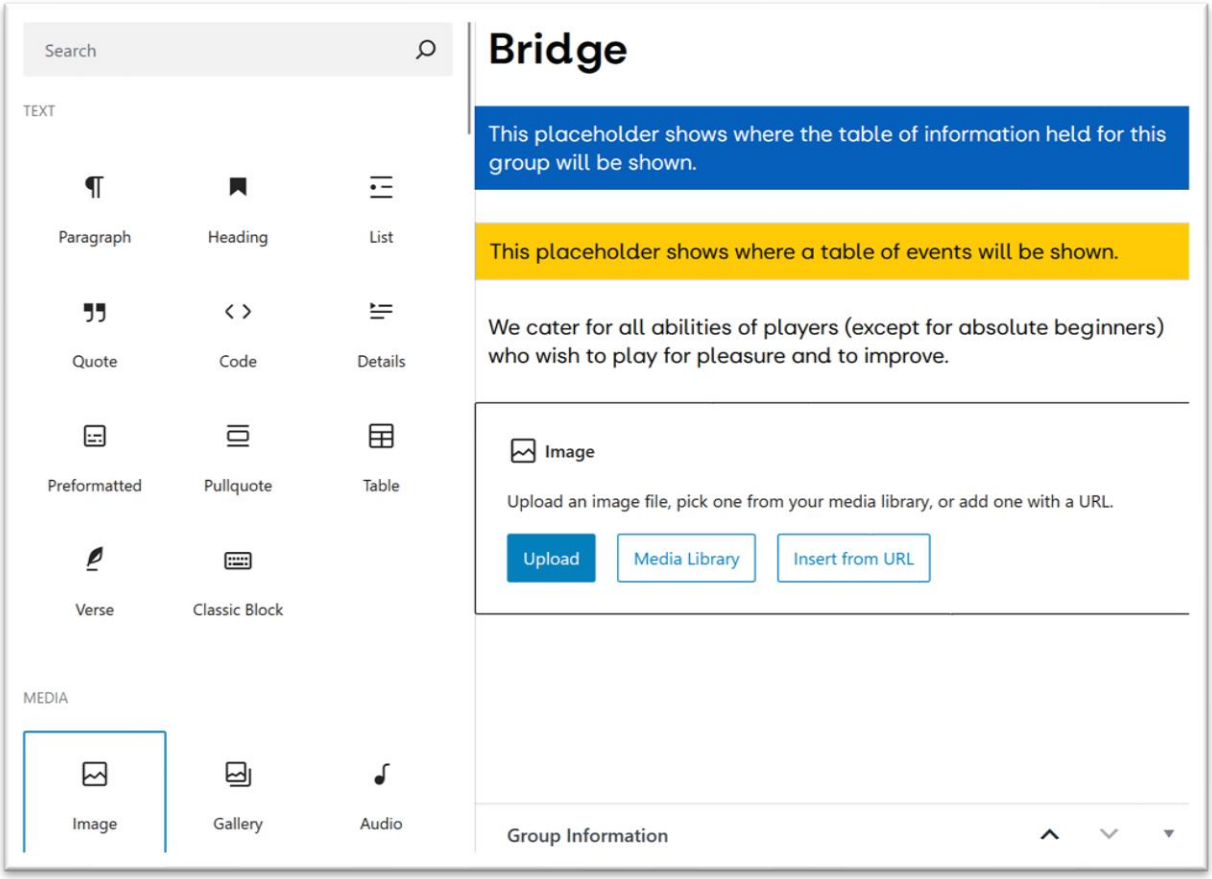
The SiteWorks team call this the hamburger method after this icon on the menu bar. Click it to reveal an overview of the blocks on your group page.
*Note that the hamburger turns **black** when selected:*



The hamburger lists the block structure down the left-hand side. The Bridge group actually has three blocks. The first two, **u3a single group data** and **u3a event list**, are SiteWorks specific blocks. (Do not delete) The third is the **Paragraph** with the description of the Group.

The above is what you see when the **Paragraph** on the Bridge page example is selected and the three-dot menu for the **Paragraph** is opened.

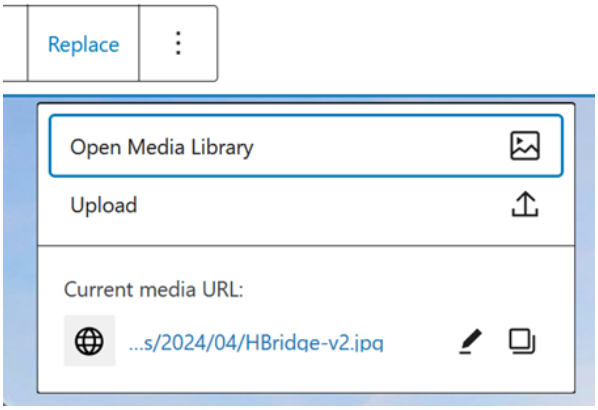
On the three-dot menu select **Add after**. Now click the blue plus icon to reveal the available blocks. Locate and click the **Image** block by scrolling or searching (start typing 'image' in the Search box):



This displays the dialogue box to insert your picture image. If you know the image is already in the Media Library, click that option, or you can upload it from your computer.

If you insert from a URL/Web Address use with caution as the image is not placed in the Media Library, it remains on the website the URL references. If the image on the website moves or is deleted the image will obviously not display.

5.5 Replacing an image



An easy way to replace an image is to click on it.

This brings up a **Replace** option on the pop-up toolbar.

Either select the replacement from the Media Library or Upload it.

5.6 Adding a Media and Text Block

The Image block will display the image in all the available space which is the width of the page. This can result in the image dominating the viewer's screen.

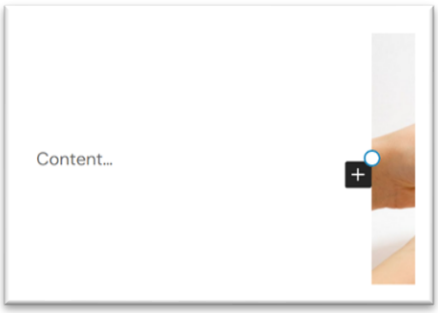
One way to place images next to text is to use a block called **Media and Text:**



It will place the image adjacent to some text, such as these playing cards:

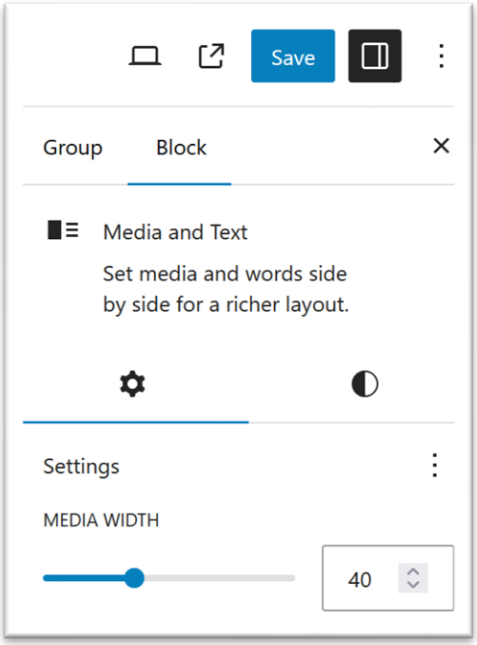


When you insert the **Media and Text** block the dialogue to insert the image appears as described above for the **Image** block. Once the image is in place you see:



Click on Content... and you can type your text.

There are various settings available. For example, to adjust the width of the image:



If not already displaying, open the Setting menu with the icon (top right).

Select the **Block** tab. (not the **Group** tab)

This example shows the image is set to take up 40% of the width leaving 60% for the text.

The image can be aligned left or right-hand side using the pop-up toolbar for the **Media and Text** block:



5.7 Add a Gallery to your Groups Page

The **Gallery** block is a way to place multiple images next to each other.

Look at the settings control to adjust the number of columns your images are shown in.



If you want to explore creating more sophisticated layout then take a look at the **Columns** block.

An advanced way to show multiple images in a gallery is a block called **Gutenslider**. It can display a different image every few seconds as a slide show.

5.8 Add an Event to your Groups Page

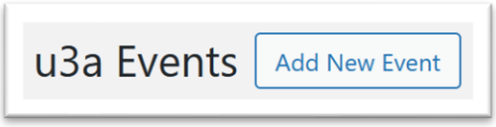
A Groups page communicates regular timetabled information about your Group's activities – e.g. we meet weekly, 10am Mondays at the Anytown hall.
The SiteWorks **u3a Events** feature is a way to give more information about individual meetings. Your u3a will most likely use **u3a Events** for monthly meetings to provide details of each month's talk and speaker.

Note that if the Exclude Group Events setting is set then any event you create will not be displayed - do check with your Web Manager.

You can also create an event for your Group. It might be a Bridge tournament for local u3as, it might be an extra meeting. Now if the audience is only going to be your Group members you will probably edit the text on your Group's page.

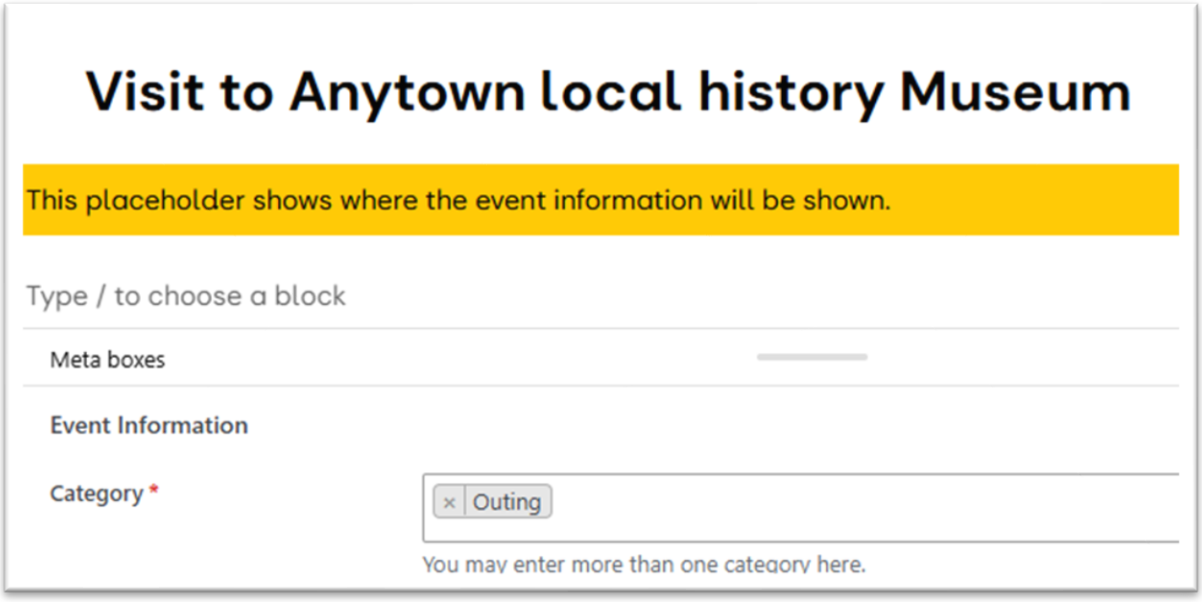
Another option is to create a **u3a Event.** The advantage of this is the event can be highlighted in a news or events section of your site – your Web Manager will have details. Creating an event could be a way to advertise your Group to the whole of your u3a – perhaps you have places to fill on a guided museum visit.

On the Dashboard menu click on **u3a Events.** This will list all the events for your u3a on SiteWorks. You can add a new event that you will be able edit:



Or you can search for an event you created earlier.

When you add an event a screen with a form appears that is similar to a Group screen. You must enter a title for the event, select a category and a date. For example:



Further down the form you need to select one of your Groups. All the other fields on the form are optional.

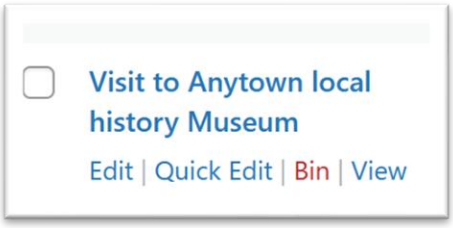
Just like the Group screen, you can enter some descriptive text below the yellow event placeholder block. Don't forget to publish your event:



After clicking Publish you may need to confirm with a second Publish button. You can also save a draft and publish later.

Note that the key to events is the **Event date**. Once the date is in the past SiteWorks will no longer list the event on the site. This means you don't have to remove the event on the day it takes place.

To remove your events hover over your event on the main **u3a Events** list and click **Bin** You can recover anything binned for 30 days.

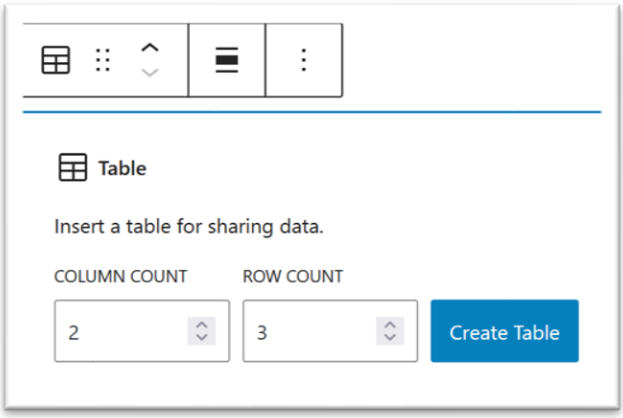


.

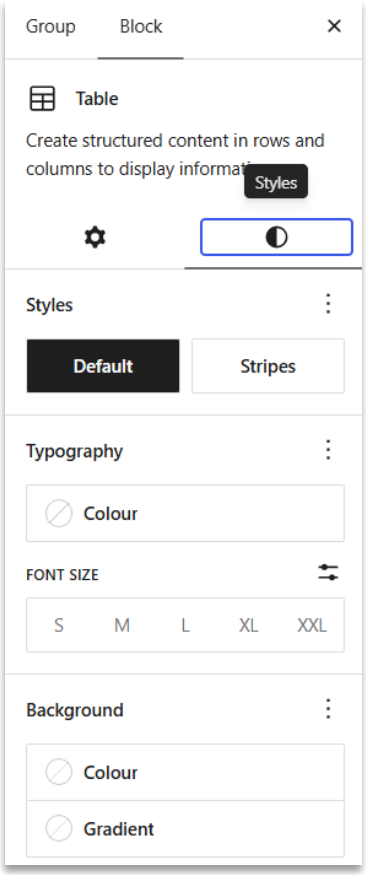
5.9 Add a Table to your Groups Page

The advantage of creating a **u3a Event** is that it can potentially reach site visitors who are not specifically reading information for your group. If you just want to list information for your members on your Group page then using a table is an alternative approach. For example, for Bridge, you could list who is partnering who each week or who is bringing refreshments.

When editing your Group use the hamburger control to add a new block with the blue +. This time locate the **Table** block:



This gives a two-column table that is similar to a table in a Word document or spreadsheet. Note you can only put text in a **Table** block.



The Block Settings menu offers various options to format your table.

Columns can be spread evenly or they can adjust automatically depending on how much text is in the cells and the device type viewing your site (mobile, tablet, desktop).

If you want more control, or to place images or other blocks in a table structure, then explore the **Columns** block.

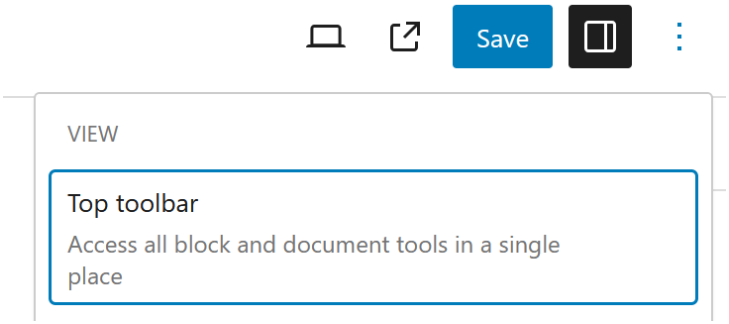
6 Additional tips

6.1 Move the block pop-up toolbar

When editing text (**Paragraph** block) you see this pop-up toolbar:



The pop-up toolbar can be moved from next to the block being edited to the top ribbon of the screen. Locate and click the other three dot menu at the very top-right of the screen and click on the box labelled **Top toolbar**:



Clicking this switches this feature on and off.

6.2 Buttons

Buttons are a way to make a link really obvious:

Latest Newsletter

To insert a button then use blue plus icon to reveal the available blocks. Locate and click the **Buttons** block by scrolling or searching (start typing in the Search box):

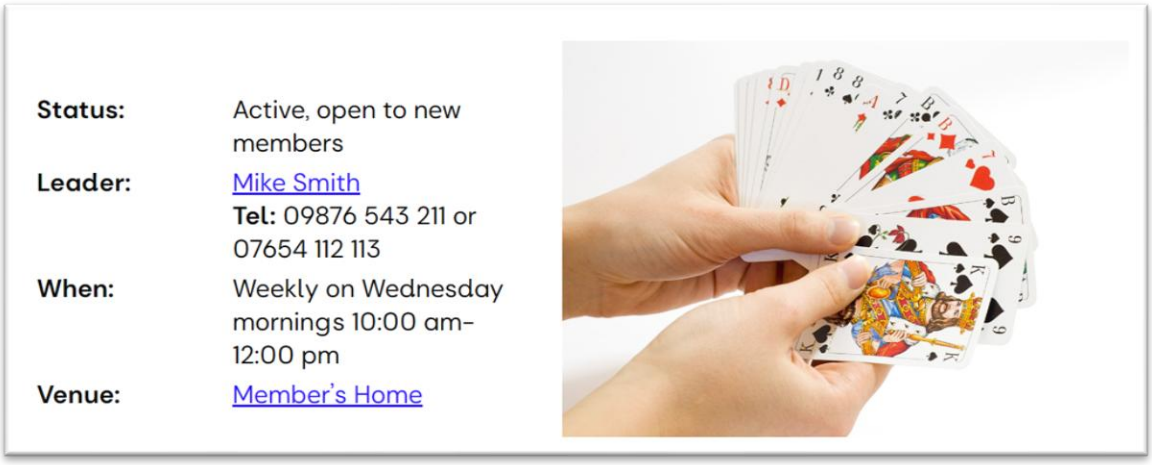
Add text... You give the button a name and then use the icon to create a link in the same way as creating a link from text in a Paragraph.

There are many settings to play with that change the colour of the button, add a border etc.

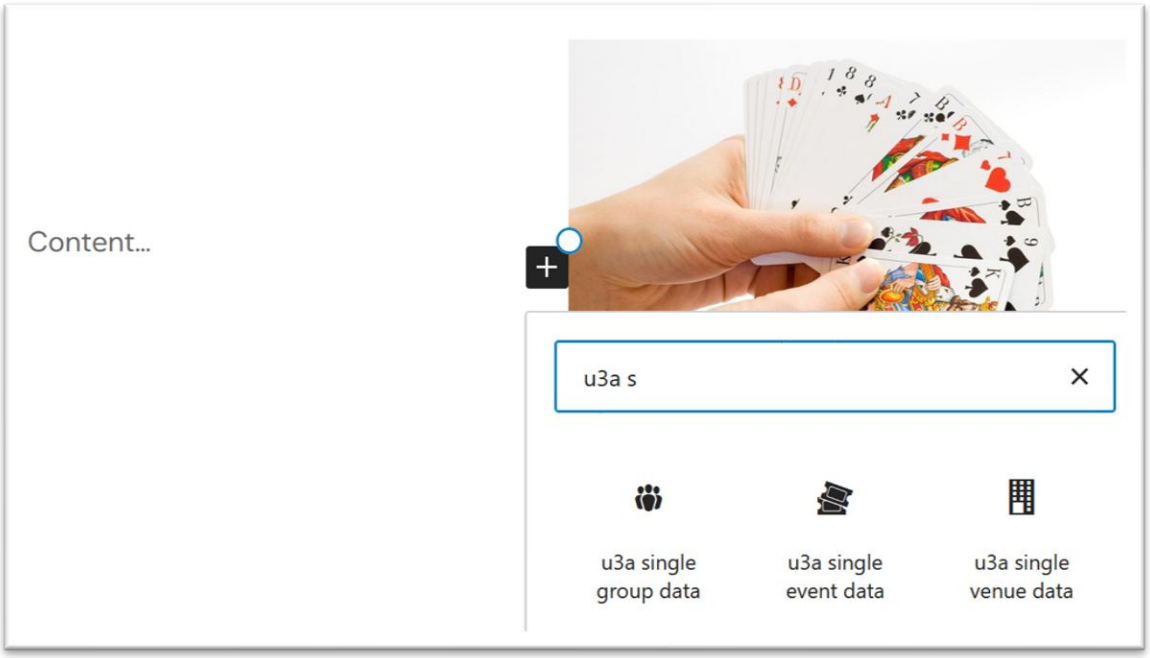
6.3 Place group information next to a picture image

Putting group information next to an image in the same way as a **Media and Text** block can look a bit smarter.

For example:

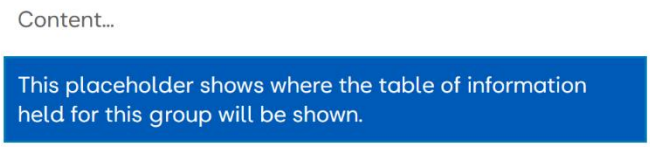


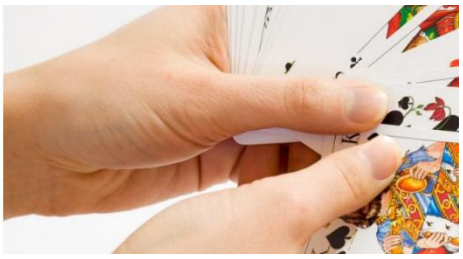
To achieve this, follow the steps in 5.6 above up to this point:



Instead of typing over 'Content...' click on the black shaded plus to show the block menu.

Type ‘u3a s’ to focus on the **u3a single group data** block. Click it and you will see:





You can add text by typing over ‘Content…’ or delete it by clicking on it and using the three dots menu ⋮ for the block, or via the hamburger structure.

Don’t forget to check your edits by doing a preview 💻 and then **Save** to publish.

7 Revision History

Version	Date	Author	Change summary
1	2024-08-01	Graham Tigg	First version inspired by Hale u3a
2	2024-08-03	Graham Tigg	Typos. Image replacements, shortcuts. Buttons.
3	2026-10-31	Tony Ridler	Typos and clarifications, term alignment with Foundation Guides, Meta boxes section 5.1, WP7.1 screenshot updates