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1 INTRODUCTION

South Solihull u3a has a website that is built and maintained using software called “SiteWorks”. This document supports the training of Interest Group Leaders and Coordinators so that they can manage their Group(s) information that appears on their web pages. It covers the essential tasks and objects, with some examples of how to enter or amend text and pictures.

1.1 Reference Manual

This training guide only covers the first essentials that need to be learned. For a fuller description of many more of the features of SiteWorks, please refer to the ‘Group Author Reference Manual’, which is available from the ‘Documents’ page of our website. It includes:

- Information about customising the layout of the SiteWorks pages.
- Conforming to Copyright requirements.
- Additional types of Blocks that you can use to build pages, including Patterns and Media.
- More information about data placeholders.
- Known bugs, and how to overcome them.

1.2 Typographic Conventions

For clarity of meaning, certain typographical conventions have been adopted in this document.

- Capitalisation: Words that have a special meaning in SiteWorks, such as media items and system object, are given initial capital letters, e.g. Event
- Square Brackets: Square brackets are used to indicate the names of buttons on a web-page, e.g. [Save]
- Single Quotes: Single quotes are used round text on a web-page, such as menu entries and text links.
- Keyboard Sort-cuts: Key combinations that have special functions are indicated in triangular brackets, e.g. <CTRL+c> means press and hold the Ctrl key then press the c key
- Bold: Bold text is used to draw attention to particularly important notes.

1.3 Important Notes


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 or documents added are not subject to copyright by others.

1.4 Operating System Differences

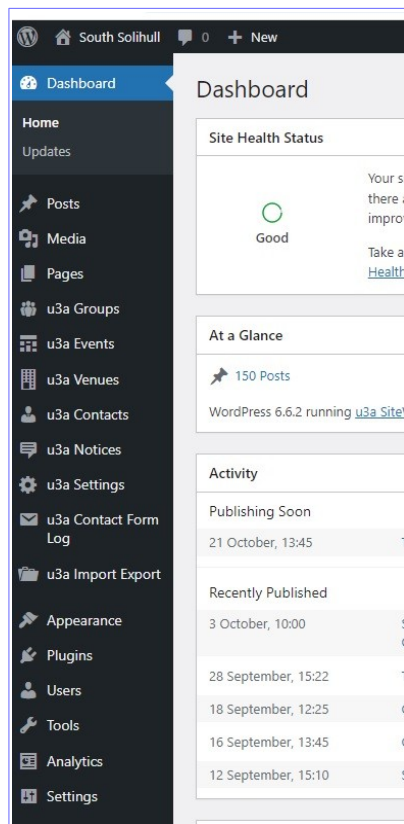
SiteWorks runs on your Internet Browser, which in turn uses the Operating System of your computing device. There are many versions of Operating Systems and Browsers, so this document describes how SiteWorks behaves in general terms. You may well find that there are details of that differ from the descriptions or screen-shots shown here when you try them on your device. This does not mean you have done something wrong! But you may have to figure out for yourself some of the details, using this document as a guide. If you get really stuck, please ask for help from your Webmaster.

1.5 Logging in to SiteWorks

- You will be given a Username and Password by your Web Manager.
- The initial log-on screen is at southsolihull.u3asite.uk/wp-admin/
- If you want to see your password as you type it, click the  icon.
- There is a “Lost your password?” option that will send you a password reset email. Please note that this is only for when you have genuinely forgotten your password. There is a better way to change your password after you have logged on, as we shall see in section .2.2 .

2 THE DASHBOARD


The first thing you see after logging on is the Dashboard. This gives you access to all the features of the website that you can view and/or edit.



On the left on the black background is a menu of parts of the website. The remainder of the screen depends on what you select on the menu and on the level of permissions you have been granted.

You will notice that some of the menu entries start with “u3a”; these are enhanced objects that have been created by the u3a development team, that provide features specifically tailored to our needs. For simplicity, in this document we will refer to u3a Events simple as Events, and so on.

The menu starts in the top left corner.

	This icon can be ignored. It opens a WordPress menu and navigates to system version information.
South Solihull	View the current website home page. Click on it again to return to the Dashboard menu.
Posts	A way to add articles or “blogs” for your group. They appear in the “Past Events” area of each Group page. Adding Posts is covered in section 7
Media	All photos and documents for the site are stored here.
Pages	These are the site’s general pages. You can only view these if given permission by your Webmaster.
u3a Groups	This is where you will find your Group pages. Your Web Manager will give you “Author” rights to the group(s) for which you are responsible.

u3a Events	Events are associated with a specific date and time. They appear on the Diary page, and in the "Forthcoming Events" area of the Group page to which they are assigned. How to setup Events is covered in section 6 .
u3a Venues	These are venues you can associate with your group(s) or Events. If a new venue needs to be added, contact your Webmaster.
u3a Contacts	This is a list of names or roles, together with their email addresses, The primary use for this is to allow users to send email to Contacts. Depending on the permissions you have been granted you may, or may not be able to see this list.
u3a Notices	These will be general notices and news items for your site, which appear on the Welcome page. If your group needs to communicate a last minute change or make an announcement ask your Webmaster to put a notice there.
Profile	Various personal settings, including changing your password.
Collapse Menu	If you want to hide the menu, to give more room on the main part of the screen, you click on this button. To bring the menu back, click on the round icon again.

2.1 Permissions as an Author

The SiteWorks offers a hierarchy of user roles to allow targeted access to the website objects.

The Author role is third in that hierarchy, below Administrator and Editor. The following object permissions are granted to you as an Author:

Object	View?	Add?	Edit?	Delete?
Media	All	Yes	Own only	Own only
Event, Post	Own only	Own Group only	Own only	Own only
Page, Group, Venue, Contact, Notice	Own only	No	Own only	Own only

There is an exception to the above: If you don't own an object of a given type, you can see all objects of that type. For example, if you have no Events assigned to you, you can view all Events, but as soon as you have your first Event assigned, that Event, and any subsequent Events that you add, will be the only ones you can see, and therefore the only ones you can select for editing etc.

You will mostly be working with Media, Events and Posts, so these are the only things described in these notes. If you wish to work with any of the other object, please contact your Webmaster. For example, if you want a separate page for, say, archive material, you can request the Webmaster to create it for you, and give you permission to edit it.

2.2 Changing Your Password

You should have been given an initial password. If you decide to change your password, select **Profile** from the menu and scroll down to 'New Password'. Once you have confirmed your new password, don't forget to click 'Update Profile' at the bottom.

SiteWorks doesn't use a 2-step verification login, so your password needs to be strong. New passwords must be at least 11 characters long and contain one or more of the following:

- Upper case character
- Lower case character
- Numeral



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- Any of these special characters: “() * & @ ! £ \$”. but NOT “#”.

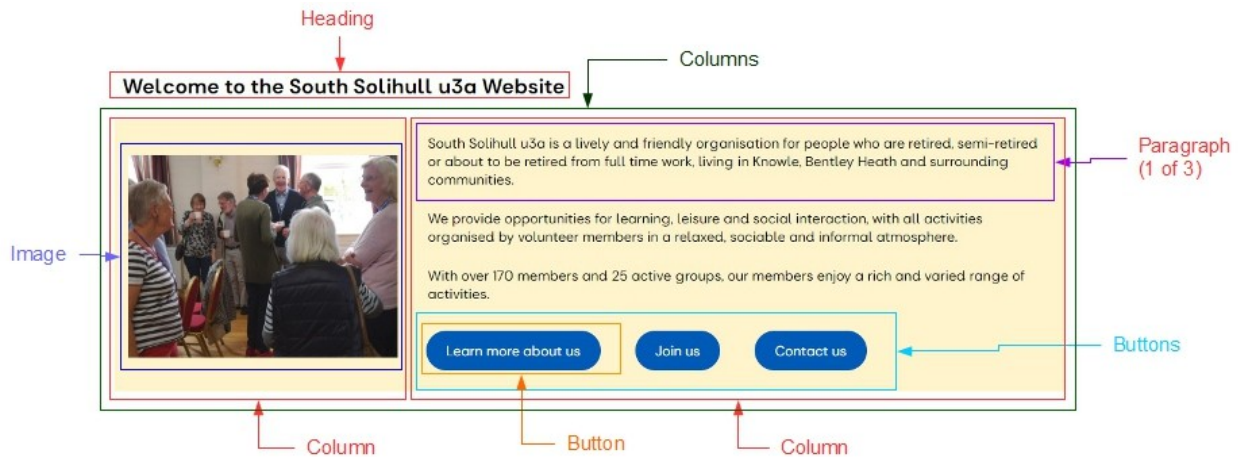
Your Web Manager can't tell you what your current password is, but can change it.

3 BLOCK STRUCTURE

If you look at a sample of pages, you will see that there is a consistency in how the information is displayed. This is mostly achieved because of the Block Structure of the pages.

All Pages are built out of Blocks. There are dozens of types of block, but you will only be using a small sub-set of possibilities. Some Blocks hold actual data, such as text, photographs and headings. Other Blocks are containers that group block inside them, such as Columns and Tables.

A sample from our Home page illustrates the general idea...



The layout of the various pages are described below, with a description of the appropriate type of block to use, and where to place them on the page.

3.1 Block Settings

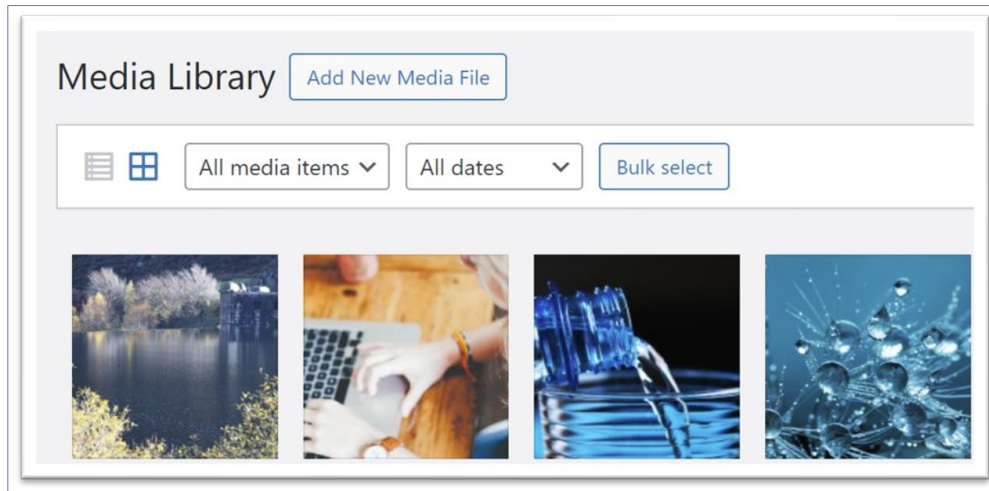
When you select a Block the Setting Menu on the right of your screen will show a set of options appropriate to the Block you are working on. In this document some of the most important settings will be mentioned, but there are many more than can be included here, so you should take some time to explore the settings for the Blocks that you use as some useful and interesting effects can be obtained.

4 MEDIA LIBRARY

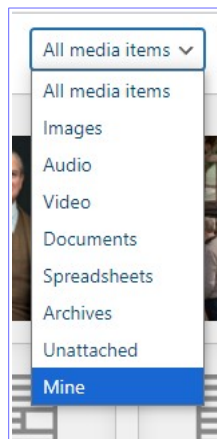
Before we look at pages specific to your Interest Group, it is useful to start with the SiteWorks Media Library. This is a repository of all uploaded images and documents used – or available for use - in your website. You will be using the Media Library frequently when building Event and Posts, as we will see later.

To access the Library, click on ‘Media’ from the dashboard.

You can load images and documents into the Media Library, and you can also delete any that you have loaded.



You can quickly find media that you have uploaded by selecting ‘Mine’ in the Filter area at the top of the page



4.1 Adding a New Item to the Media Library

There are two ways to add a new item to the Media library:

- 1) Directly into the library
- 2) By uploading an image when creating an Event or Post.

The second method is preferred because the system keeps a note of which object the media was used on, which can make it easier to identify which items are in use, or not.

We will describe the first method here, and the second method in section 5.5 .

Click on ‘Add New Media File’, and either select the file from your computer or use drag & drop.

4.2 File Formats

The best format for images is JPG (files with the extension .jpg or .jpeg), as these tend to use the least amount of storage space. Other formats, such as PNG images are less compressed so are much larger, typically by a factor of 5 times. This is significant when viewing pages over mobile networks.

Note that on windows, most file formats can easily be converted to JPG using the Paint program. Open the image with Paint and select File/Save As and select JPG. Alternatively there are a set of online tools such as <https://png2jpg.com/> to convert formats easily.

HEIC format images are a standard across Apple devices, but are not supported by SiteWorks. There is an online conversion program: <https://heic2jpg.com/>.

Simple animated images using GIF format can be uploaded, but again, to save space, they should have only a few frames of animation.

Video files cannot be uploaded.

4.3 Setting the Meta-data for a Media File

It is very important to create the meta-data for Media. This is the only way we can keep track of who owns the Media and where it is used. We try to keep the Media Library tidy by deleting anything that is no longer in use, so unidentified Media may get deleted in error. It is particularly important to do this for images and to fill in Description field, as described below.

You can click on a file to set the following meta-data:

- Title
- Caption
- Alternative text
- Description

Some information, such as the Title, will be copied in from the device that uploaded it, but can be changed here if desired.

A caption can be set that can appear underneath the picture when it is used on a page or other object, if you wish it to.

Alternative text (“alt-text”) is a brief text description of an image, and is used by screen readers to provide information about the image's content and purpose to someone who cannot see the picture. The text is also used by Search Engines.

The Description is only for the Library. It is included in the scope of “Search Media”, so it is particularly useful to include key words that might be searched for when trying to locate an image, or to determine where the item is used on the website. Please include all of the following (where relevant):

- The Group that the image belongs to.
- The name of the Event of Post that uses it.
- The date of the Event of Post

It's good practice to set the meta-data immediately after uploading images, whilst the task is fresh in your mind.

4.4 Replacing a Media File

You may find that you want to replace a media file that you have uploaded to the Media Library with a new version. The process is slightly different for images and documents. The procedure for replacing images is explained in section 5.8

The procedure for linking to a document is described in section 8.4 . The procedure for replacing a

document is similar, as follows:

- In the Media Library, upload the new document in the usual way. Note: it must have a different name to the existing document.
- Click on the new document to get the details. This is a good opportunity to enter the meta-data for the new file.
- In the right pane, below the description, etc., click on "Copy URL to clipboard".
- On the relevant page, highlight the text that links to the old document and click the "Link" item on the flying toolbar.
- In the pop-up window, click the pencil icon to Edit Link.
- Delete the existing URL and replace it with the copy in the clipboard using <CTRL + V>
- Click Save.
- Test to check that the new version is displayed.
- If the file is referred to on any other pages, update these too, in the same way.
- Finally, in the Media Library, delete the old version of the document to keep the library tidy.

5 INTEREST GROUPS

As we say on the website, one of the main benefits of joining the u3a is the opportunity to participate in our special Interest Groups. Accordingly, Interest Groups feature prominently on the site and occupy the majority of the pages.

From the website's Home page, the Groups page lists the Interest Groups and provides information and clickable links to each one.

The 4 buttons part-way down the page allow the Groups to be listed:

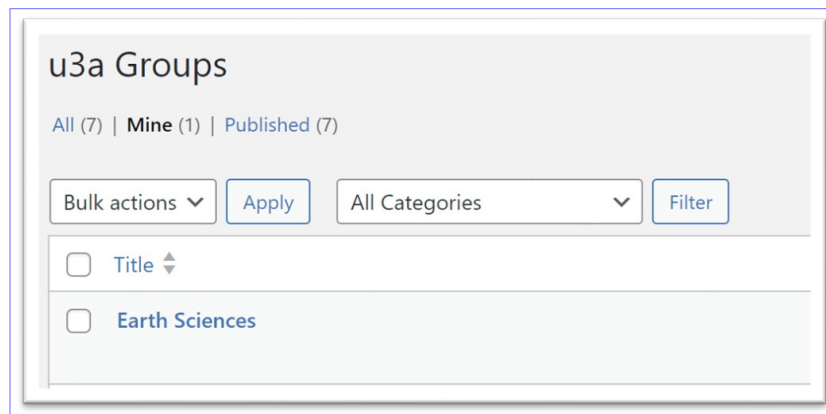
- Alphabetically, by Group name.
- By Category. A Group may be assigned to more than one Category, so could appear more than once in the listing.
- By Meeting Day, to show which activities take place on each day of the week.
- By Venue.

To facilitate those listing options, it's necessary for the Groups to be maintained with the relevant information.

5.1 Editing a Group Page

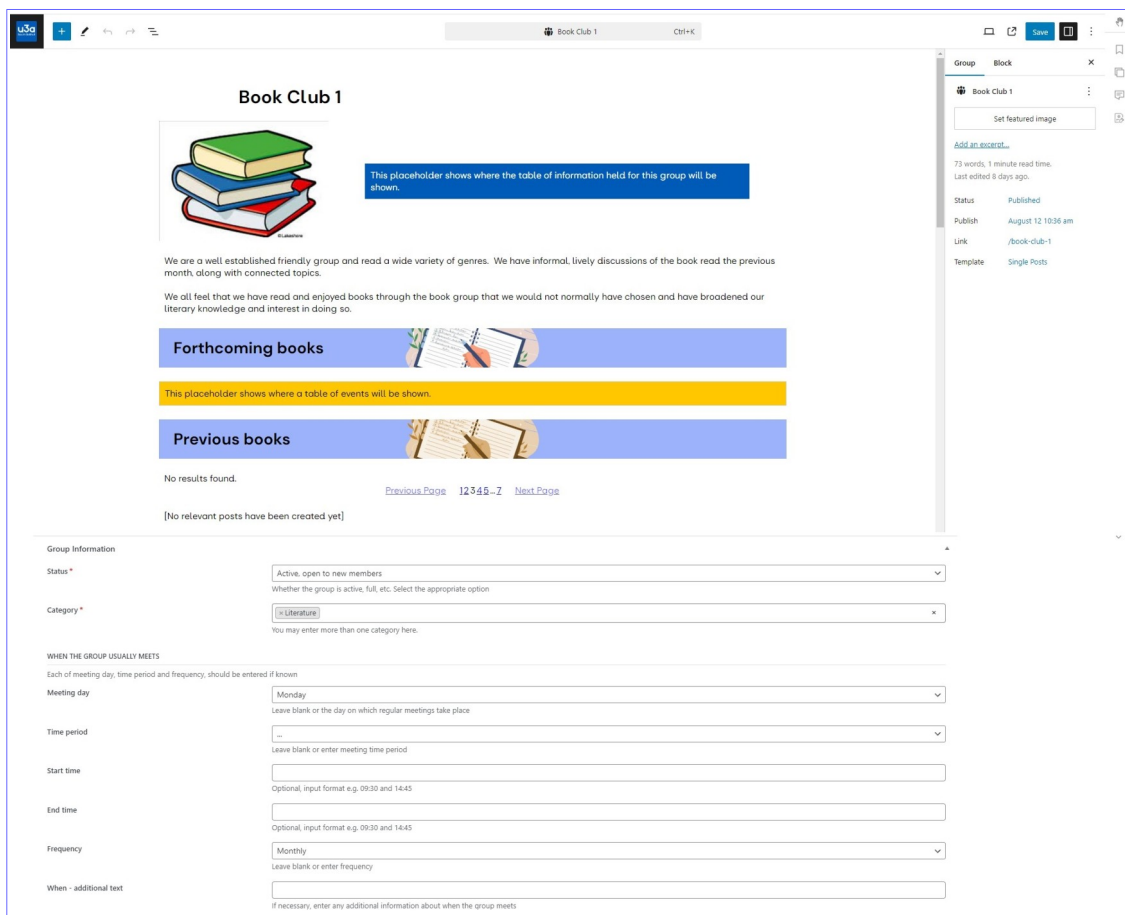
Each Interest Group has its own page on the website.

From the dashboard, select 'u3a Groups' and you will see the groups that you can edit:



Click on a Group name, or hover over it and select 'Edit'. [Note: 'Quick Edit' is used by the Webmaster to set the title and other properties of the Group. You will not need to use this.]

You will see something like this Book Club example:



5.2 The Structure of a Group Page

For consistency, each Group page is arranged in the same way:

- A photograph or other graphic sits at the top-left to illustrate the Group in some way.
- The “info-block” placeholder to the right of the graphic.
- Some descriptive text explains the operation and activities of the Group,
- The “Forthcoming meetings” heading and placeholder.
- The “Previous Meetings” heading and data section.

Since the Info-block, the Events, and Posts are inserted automatically (see below), only the Picture and descriptive text need to be maintained as part of the Group page.

5.2.1 Info Block Placeholder

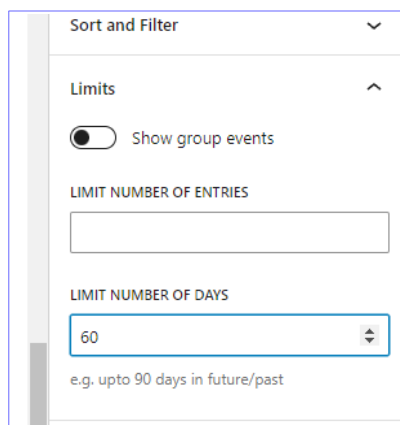
This block is coloured blue on the Group edit screen. When the page is viewed the information in this block is generated automatically from the Group settings that you enter in the table at the bottom of the screen (you may have to scroll down to the table). Many of the form entries have drop-down list. Click the downward arrow on the right to expand the list and select an item.

5.2.2 Forthcoming Meeting Placeholder

This placeholder block is the yellow bar with the text “This placeholder shows where a table of events will be shown”. This is automatically generated from the Events that you create, as described in section 6 . It displays all the Events for the Group with future dates. This means that **you don't enter details of individual future meetings directly on to this page**, instead you create Events,

and these will then be inserted automatically onto your page in the placeholders.

Clicking on the block revealed several options on the right of the screen.



One of these is 'Limits'. You can use this to control how many, or how far ahead, forthcoming Events are shown on the Group's page. This is useful if you want to put more Event in the diary than you want users to see immediately.

5.2.3 Previous Meetings Data

The section works in much the same way as the Future Meeting placeholder, although it looks different on the screen because it is based on a special type of container block called a 'Query Loop'.

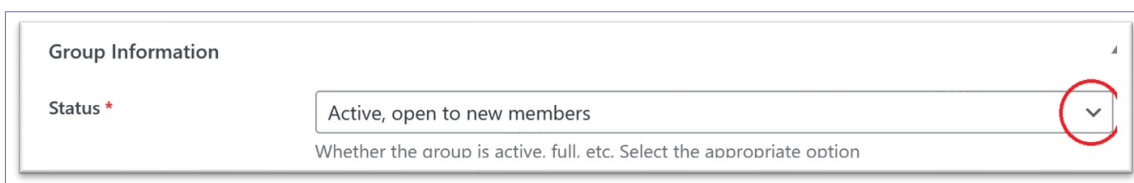
As with Forthcoming Events, **you don't enter details of past meetings directly on to the Group page**; you create a descriptive Post for each recent activity undertaken by the Group, as described in section 7. These will then be inserted automatically onto your page.

This section and its header may be omitted for Group that do not keep records of their meetings.

5.3 Adjusting the Group Settings

The Group information is entered in a table of fields that are usually displayed towards the bottom of the form, starting with the Status field. You may need to scroll down to see all the fields.

Expand the drop-down lists using the arrow (highlighted in the red circle):



The Settings include the following elements:

Field	Explanation
Status (required)	Select from the drop-down list
Category (required) *	Select one or more from the drop-down list. The available Categories are agreed by the Committee and added by your Web Manager if necessary. The Categories are used to list the groups on the Groups page, when the "By category" listing is selected.

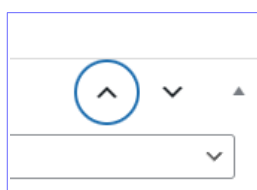
Field	Explanation
The following are optional	
Meeting day *	Select from the drop-down list. Note that the chosen day appears in the Group information block and is used to list the groups on the Groups page, when the “By meeting day” listing is selected.
Time period	Select from the drop-down list
Start and End time	Select times , if applicable
Frequency *	Select from the drop-down list
When – additional text *	e.g. ‘1 st and 3 rd week’, ‘We meet on bank holidays’
Venue *	Select from the drop-down list. If a venue is chosen, it appears in the Group information block and is used to separate the listing on the Groups page, when the “By venue” listing is selected.
Group Coordinator and Coordinator 2 **	Select from the drop-down list. Add new Contacts if necessary
Tutor **	Select from the drop-down list
Primary (Secondary) group email **	Preferably use a non-personal email address(es) for the group
Cost	A text field, in case you want to show the cost – for example the entrance fee for an event

* After changing any settings, re-check how the Group appears on the **Groups** page, for each of the four listing options.

** If you change these entries, also inform the Groups Coordinator, as the information may need updating elsewhere, e.g. the Beacon membership system.

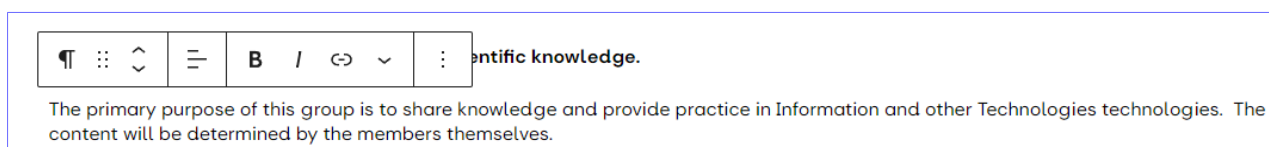
5.3.1 Moving the Table

The table of data for the Group may be moved from the bottom of the screen to the panel on the right, or vice-versa. You do this using the two buttons at the top-right of the table:



5.4 Changing the Descriptive Text

The descriptive text and pictures for a Group are contained in Blocks. A block that just has text is a Paragraph block.



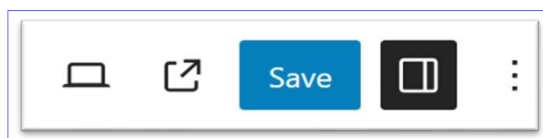
To edit the text, click on the text and a menu pops up. This menu can be moved to the top toolbar (see section 10.1 for how to do this).

You can now edit the text as you would in a word processor, but note that there are some special rules for advanced editing – see the Reference Manual for details.

The block toolbar for a Paragraph block offers the following:

Icon	Explanation
	An advanced feature to transform the paragraph to another block type
	These controls let you drag (six dot) or move (arrow) the paragraph up or down the page. NOTE: You have to drag the six dots icon, not the paragraph text. See section 9 concerning moving Blocks.
	Align the paragraph (left, centre, right)
	Make text bold or <i>italic</i> , or both
	Insert, amend or delete a link. Links are described in section 8
	Opens a 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**.



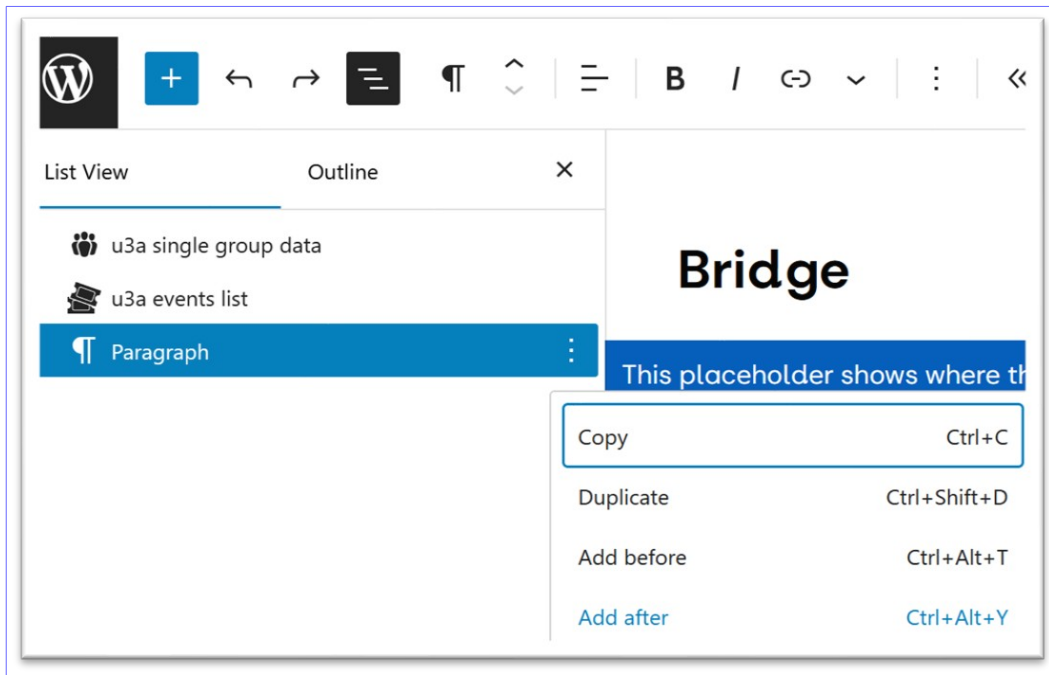
The icon enables to see what your page looks like to site visitors on a computer, tablet or mobile. See section 5.12 for details.

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

5.5 Adding an 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.

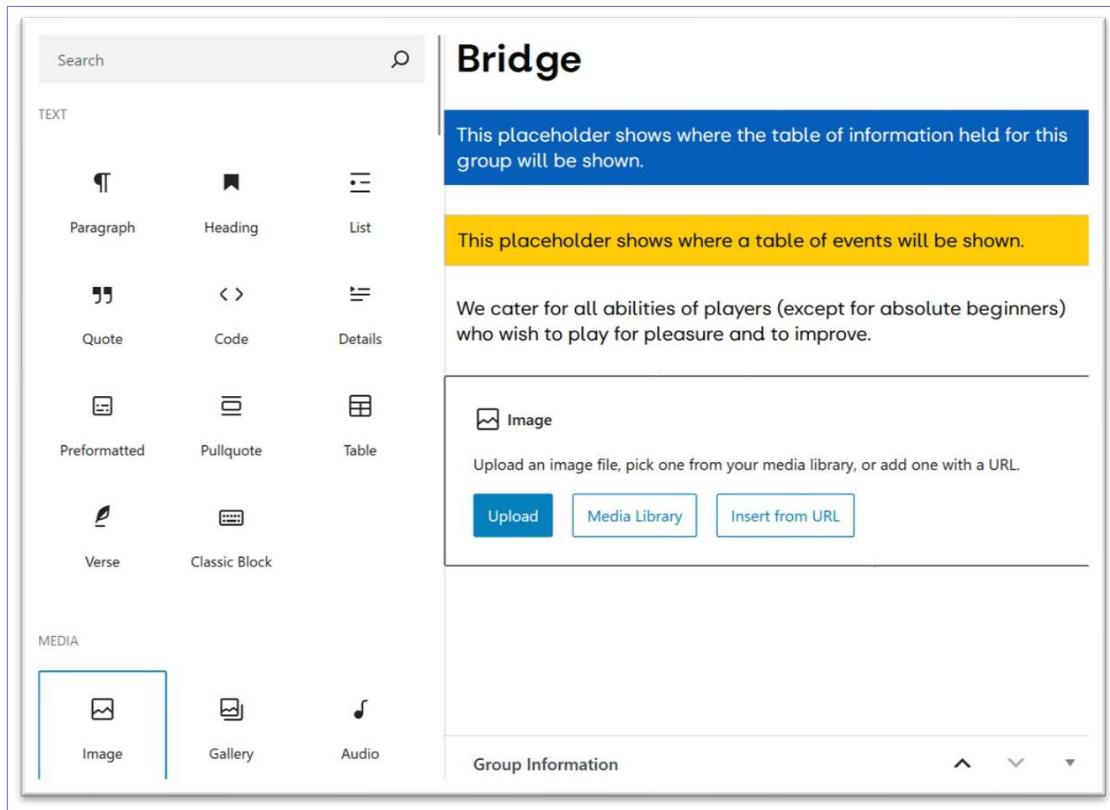
The SiteWorks team call this icon on the menu bar the Hamburger. Click it to reveal the structure of the Blocks on your Group page. Note that the Hamburger turns black when selected:



The Hamburger lists the block structure down the left-hand side. In our example, the Bridge group has three Blocks. The first two, 'u3a single group data' and 'u3a event list', are u3a specific blocks. 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 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 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.

5.6 Setting the Picture Resolution

When images are uploaded, the website reduces the resolution (picture sharpness) if necessary to a maximum of 1920 x 1920 pixels. But if the image only needs to occupy a small area of the screen, that resolution is unnecessarily high. Reducing the resolution can greatly reduce the amount of data, and therefore reduce the loading time of the page, often without any perceptible effect on the picture.

To optimise the resolution, click on the Image, and find the Resolution setting towards the bottom of the Settings pane:

Several options are available for selection.

You should try each one in turn, starting with the largest, and choose the smallest that does not result in a noticeable degradation in quality.

5.7 Setting the Meta-data for the Picture

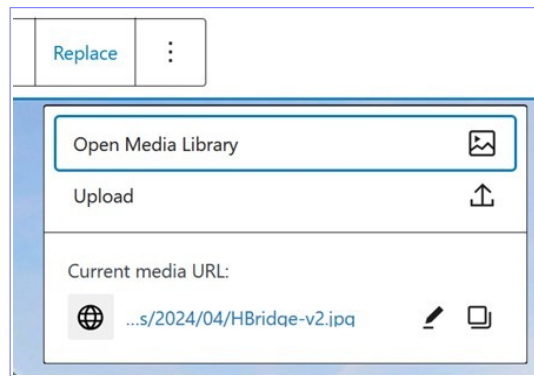
If you import a picture from the Media Library, the meta-data (alt-text, caption, etc.) are automatically copied in from the library, but you can change them for your page if necessary.

To add (or remove) a caption under your picture, click on the “...” icon on the block menu that appears when you click on the picture.

If you want to write text over the picture, use the ‘A’ icon just to the left of the “Add caption” icon. You can set the colour of the text afterwards in the Settings pane.

The Alternative text is set or edited towards the top of the Settings pane when the picture is selected:

5.8 Replacing an Image



An easy way to replace an image is to click on it. This brings up a Replace option on the block menu.

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

If you know the old image is now not being used, please delete it from the Media Library to keep it tidy.

5.9 Adding a Media and Text Block

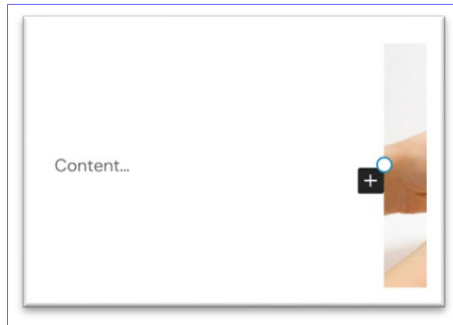
The Image block will display the image in all the available space which is the width of the page. This can result in the image dominating the viewer's screen. One way to place images next to text is to use a block called Media and Text:



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

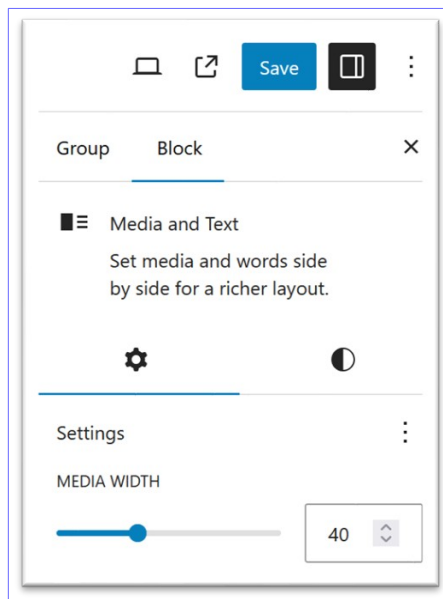



When you insert the Media and Text block the dialogue to insert the image appears immediately as described above for the Image block. Once the image is in place you see:



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 Settings menu with the  icon (top right).

Make sure the 'Block' tab is selected (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 menu for the Media and text block:



5.10 Adding a Gallery

The Gallery block is a way to place multiple images next to each other. After adding a Gallery, look at the settings control to adjust the number of columns for your images.




5.11 Adding a Columns Block

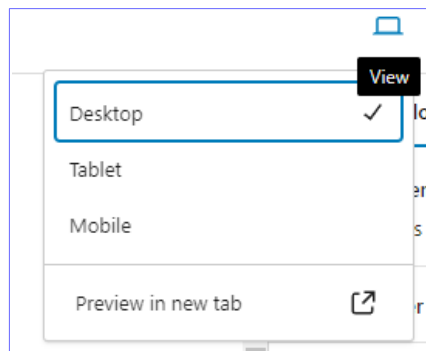
If you want to explore creating more sophisticated layouts then take a look at the Columns block.

A Columns block contains two or more Columns, and each column can contain any object, and can have its attributes, such as background colour set independently from the other columns.

A Columns block is added in the same way as other blocks, but prompts you to chose one of a standard set of layout when you add it. Experiment with the various settings until you get the look you are after.

5.12 Page Views.

You need to be aware that your page will be viewed on different size screens. You can see what it will look like by clicking the View button  at the top right of the screen. This enables you to see what your page looks like to site visitors on a computer, tablet or mobile.



6 ADDING EVENTS

Creating an Event is the best way to let your Group members know what is coming up, and to advertise your Group to the whole of your u3a.

In addition to appearing on the relevant Group page, all Events will also appear in the listing on the Diary page, except when the Event Date is more than 2 months in the future (or whatever limit your administrator has set).

6.1 Creating the Event

On the dashboard, click on **u3a Events**. If you haven't previously created an Event, you will be able to see all the events for your u3a on SiteWorks. If you have already created one or more Events, you will just see your own entries.

To add a new event, either click on 'Add New Event', or you can use the 'Clone' function to create a copy of an existing Event:



When you add an Event, a screen with a form appears that is similar to a Group screen.

Discussing Current Affairs

This placeholder shows where the event information will be shown.

Political difficulties; social injustices? We'll sort them out over a coffee, in a corner of the bar.

Event Information

Event category *

Event date *

You must enter a title for the event, select a category and a date. For Interest Group events, the Event Category should always be 'Meeting'.

6.2 Choosing a Title

The Event title should of course describe the event, but bear in mind that the Event will appear on the Diary page listing, which is not specific to your Group.

For example, if your Interest Group holds a regular meeting each month, creating each Event with the title "Monthly meeting" might confuse members who are not part of your Group, as well as giving the impression that nothing much is happening. Instead, try to be more creative and specific, even if it's only something like "*Military History monthly meeting*"!

6.3 Setting the Event Fields

As with the Group pages, the Event settings sit at the bottom of the form, and has these elements:

Field	Explanation
Title (required)	Enter a Title for the Event (see above)

Field	Explanation
Event Category (required)	Select Meeting from the drop-down list
Event date (required)	Enter the date on which the Event will occur or start. Note that Events are displayed up to the end of the Event Date.
Start time	Provide the start time...
End time	... and the finishing time, if known
Duration (days)	If the Start and End times are not sufficient to describe the duration of the event, this field may be useful
Group (required)	Select the Group to which the Event applies. Note: only Groups for which you are the Author appear in the drop-down list
Venue	If applicable, choose the venue from the drop-down list
Organiser	Select the organiser from the list of Contacts
Cost	This text field may be used to indicate the cost of attending the event
Booking required?	Tick the box if attendees should make a booking. If so, remember to indicate in the text how the booking should be made

6.4 Describing the Event

Just like on the Group screen, you can enter some descriptive text and/or images below the yellow placeholder block to provide more detail or enhance the appeal of the Event to potential attendees.

6.5 Including an Excerpt

On the Diary and your Group page, the Event listings show the title and some of the text. The text in the listing is known as the Excerpt. By default, the excerpt is generated automatically using the first 30 words of the your Event description. If there is more text than will fit in the excerpt, an ellipsis [...] will be added to indicate this.

If desired, you can override the automatic text by providing your own in the Excerpt box. When creating or editing your own excerpt, the length is not limited, but you should try to keep to the 30-word limit to avoid cluttering the Diary page.

To enter or edit the Excerpt text, first display the **Settings** pane, if not already active, by clicking on the



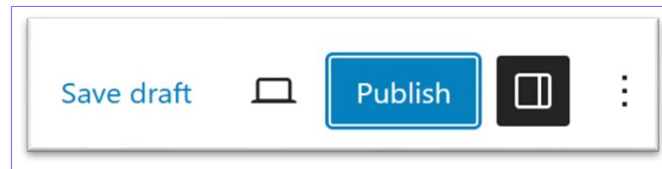
icon at the top-right of the screen.

Then click on the 'Edit excerpt' link to bring up the Excerpt dialog box. Enter your text, then close the dialog box with the 'X' to save it.

6.6 Saving and Publishing

After making any changes, don't forget to save them. Events and Posts may be saved either as drafts or as published content. Drafts are not visible to users of the website.

For a new Event or Post, the [Save draft] and [Publish] buttons are available in the top-right corner of the screen:



After clicking [Publish] you may need to confirm with a second Publish button. Once the object has been published, the [Save draft] and [Publish] buttons are replaced with a single [Save] button – there is no need to 're-publish' after making changes.

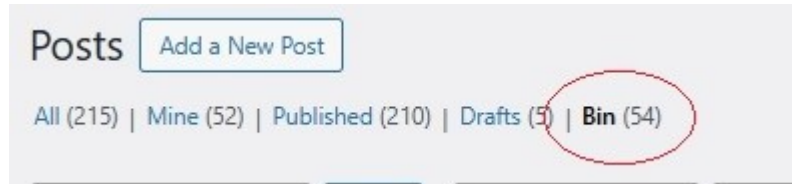
If you change your mind, and decide you need to 'unpublish' a page, you can set the Status back to Draft in the Settings menu.

6.7 Deleting

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



To recover an item from the Bin, click 'Bin' on the menu at the top of the screen, and select the item you want to recover.

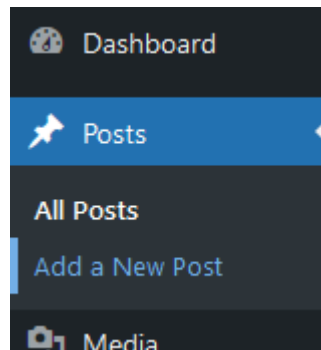


7 CREATING A POST

Posts in SiteWorks are used to create stories or “blogs” about noteworthy events. For Interest Groups, those stories appear in the Previous Meetings section of their pages. Note that Posts are not a special u3a object, so you get no help to construct it. On the other hand, this means that you are free to construct your post any way you want.

7.1 Creating a New Post

To create a Post, click on ‘Add a New Post’ on the dashboard.



The New Post screen is an almost empty space, inviting you to ‘Add title’ and ‘Type / to choose a block’.

After setting a title for the Post (see below), add whatever texts, pictures or diagrams are needed to build the story.

As with Events, you can choose to add an Excerpt, perhaps to give a more succinct description than the first text paragraph provides.

7.2 Assigning the Post

You can control the pages on which the Post appears by selecting one or more ‘Categories’. The available Categories appear towards the bottom of the Settings pane for the Post, and – with a few exceptions - correspond to the list of Interest Groups.

As an Author, you may have a very limited set of Categories to choose from, or possibly none, in which case your default Category will be assigned when you publish your post.

Don’t forget to save and/or publish the Post afterwards.

7.3 Copying an Existing Post

Alternatively, you can copy an existing Post; select the relevant one from the All Posts list, and use the ‘Clone’ function.

The cloned Post is created immediately in the background, in Draft status, and is an exact copy of the original, apart from any Excerpt, which is not copied. You will need to edit the new Post as required.

7.4 Setting the Publishing Date

Publishing an object sets the ‘Publish’ date & time to when the button was pressed, but that information may be over-written by using the ‘Quick Edit’ function or by clicking on the [Publish] button on the Settings pane:

Adjustment of the Publish date is particularly relevant for Posts, since that date is shown at the top-right of the listing, in the Previous Meetings section of the Group page. If the Post is a story about an Event, then you will probably want the date of that Event to be shown.

8 ADDING A LINK

Links can be created either as highlighted words in text, or as Buttons.


A Link is a section of highlighted text in a paragraph, or a button, that when clicked can do one of several things:

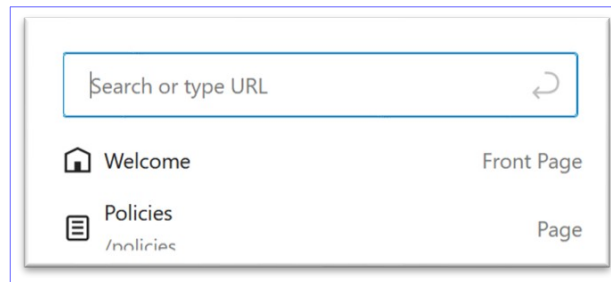
- Take the user to a new page on your site.
- Take the user to an external website on the internet.
- Open media, usually a document.

It is also possible to create a link to send an email to a Contact, but this is created in a different way, as described in section 11.1 .

Links can be created on any kind of page including Events and Posts.

8.1 Text Links

To apply a link to a word, or words in a paragraph, select the text that will become the link then click the  tool. This will open a URL form:

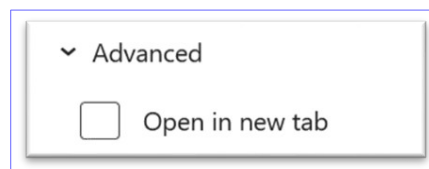


You now have to enter a reference to the thing you want to link to in the 'Search or type URL' field. Exactly how you do this depends on what you are linking to, as described in the following sections.

Submit by clicking the circular arrow on the right. The link is now in place.





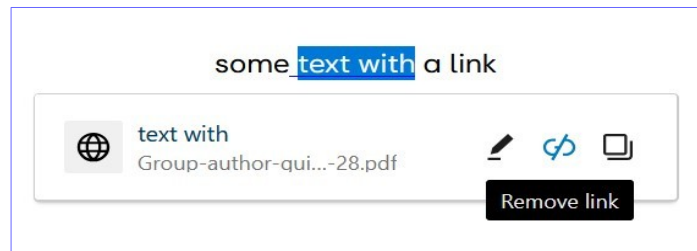
After creating the link you have a further option; do you want the link to open in a new browser tab or not? To set this option, click on the pencil icon and then check the 'Open in new tab' checkbox before saving:



8.2 Replacing a Link

To replace a link first clear the old one and create it again.

To clear the old link, select the text and click on the link icon, it will have a black background indicating a link is present . Click on it to open the link menu, then click  to clear the link.



Now create a replacement link as described above.

8.3 Linking to a Different Web Page


A link that jumps to a different page of the ssu3a website is the easiest type to create. The link dialogue box includes a search facility that helps identify the page to be linked to. Start typing the title of the web-page and you will see the matches that the search has found listed below. When you see the one you want just click it to insert the correct name into the URL box.

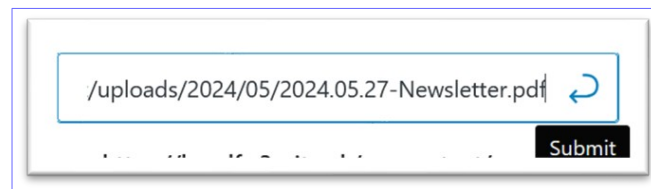
It is normal not to open such links in a new tab.

8.4 Linking a Document

Unfortunately the search facility does not work well for documents. It is simpler to paste in the reference to the document, as follows:

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.

Now go to the Page, Post or Groups etc. to edit and select the text that will become the link. Click the  tool. This will open a URL form where you can paste in the URL, then proceed as above.




When linking to documents it is generally best to open them in a new browser tab.

(On some user's browsers, depending on their settings, the document will be downloaded directly without actually opening a new tab. This is a feature of the user's system over which you have no control.)

8.5 Linking to an External Website

Linking to external websites is not recommended, as we have no control over the content, or even if it continues to exist. If you create such a link you will need to test it frequently to check that it is still working and relevant.

To link to an external site, first copy the complete URL of the target page to the clipboard.

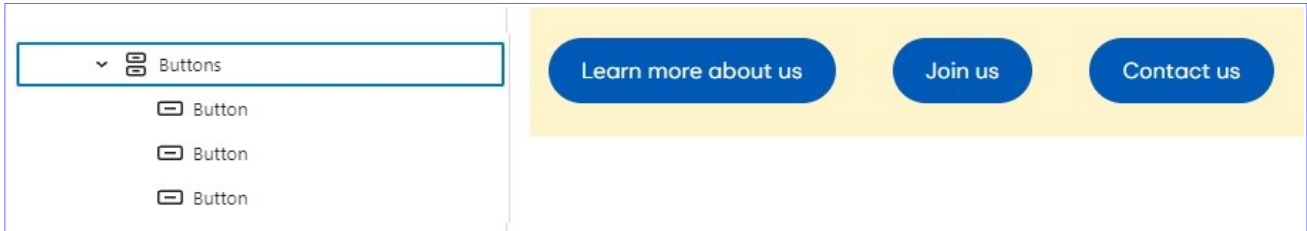
Now go to the Page, Post or u3a Groups etc. to edit and select the text that will become the link. Click the  tool. This will open a URL form, past the URL from the clipboard, and proceed as described above.

8.6 Buttons


Buttons are a way to make a link really obvious:

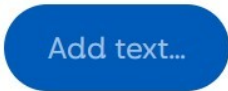
Latest Newsletter


When you insert a button you actually insert 2 blocks: There is a Buttons container (note the plural) inside which there is the first Button in the container. Having created the Buttons container, you can then add a second and subsequent Button into the same container if you want to.



After you have inserted a button, have a look at the structure using the Hamburger, this should make things clear.

Use the blue “plus” icon  to reveal the available blocks. Locate and click the Buttons block by scrolling or searching, or start typing in the Search box.



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.

In the Settings, you can change the appearance of the Button, however, we recommend that you stick to the standard style for consistency.



9 MOVING BLOCKS

You can move a block to a different place on your Event or Post in two ways.

- 1) Using the hamburger. Click on the block you want to move, drag it to the new place in the Hamburger and let go.
- 2) Click on the actual block on the main part of the screen, click on the 6-dots icon, drag the icon (**not the block**) to the new location and let go.

Note that there are restrictions on where you can drag to because some blocks can only exist inside a suitable container block, and some container blocks can only hold certain types of block. For example, a List Item must be inside a List block, and a List block can only contain List Items. A Column block, on the other hand, can contain any type of block.

If you try to move a block to an illegal position your cursor will turn into a “no entry” sign.

For example, if you try to move buttons around using the   icons, you will find that you can only move an individual Button within the Buttons container. Or you can move the whole Buttons container, with its contents. Using the Hamburger will help you select the thing you actually want to move.

10 MENUS AND SIDEBARS

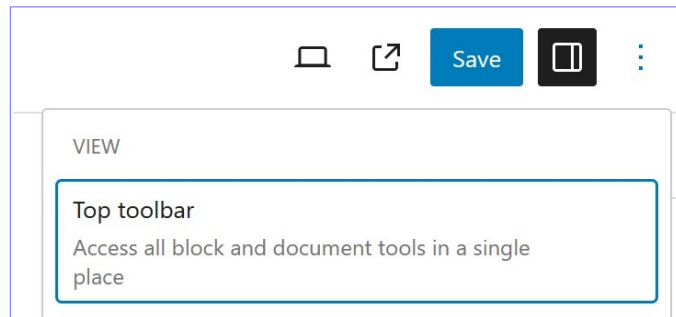
SiteWorks gives you some options for re-arranging the size and position of the various menus and sidebars on your screen. You might want to use these options if you need to make more room on your screen for editing, or if you accidentally move or close a menu and you can't see how to get it back.

10.1 Moving the Block Menu

When editing text (Paragraph block) you see this menu:



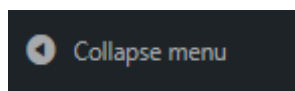
That menu can be moved from “floating” next to the block being edited, to the top ribbon of the screen. To make that change, locate and click the other three-dot menu at the very top-right of the screen, and click on the box labelled Top toolbar:



Clicking this acts as a toggle. Note that the Move icon (6 dots) is only available on the floating menu.

10.2 Collapsing the Main Menu

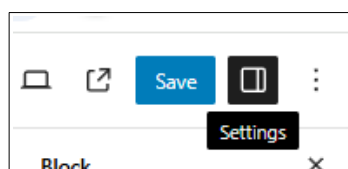
At the bottom of the main menu (on the left) there is this button:



Clicking it reduces the menu to a thin strip of icons only. To get the full menu back, click the round icon again.

10.3 Collapsing the Settings Menu

When editing a Page or Block, the right-hand side of the screen is used for the menu of settings appropriate to the object being edited.



You can hide or view this side-bar by using the [Settings] button at the top-right of the screen.

11 HIDING EMAIL ADDRESSES

Member's personal email addresses should not be exposed to the public, unless the member specifically requests it. SiteWorks has a way to allow emails to be sent to Contacts, without letting the user know what the email address is. This facility is used wherever a Contact is used on:

- Groups: Coordinator, Coordinator 2, Tutor
- Events: Organiser

Status:	Active, open to new members
Coordinator:	Terry P.
When:	Monthly on Thursday mornings 10:00-12:00

The system automatically generates the link on the Coordinator's name. When the user clicks on this they get a pop-up form allowing them to send an email to the Contact, but the Contact's email address is not show.

11.1 Links to Contacts

We saw in section 8 how to create links to web pages or media files, it is also possible to create a link that will open the dialogue to send an email to a Contact, but the method of doing so is different.

The link is created by inserting text in this format where the link is to appear:

```
[u3a_contact name="<display name>" email="<email address>"]
```

Where:

- <display name> is the text that the user will see on the web page, highlighted like a link.
- <email address> is the address to which the email is to be sent.

For example, to create the word "organiser" as a link, enter the following text in the paragraph:

```
[u3a_contact name="organiser" email="fred@home.uk"]
```

If you want to create a link to one of the named u3a Contacts that is already stored in the system, you only have to include the u3a_contact_name, and the system will automatically pick up the associated email address, thus:

```
[u3a_contact_name="Chair"]
```

12 SPECIAL CHARACTERS

The DM-sans font used by SiteWorks has some characters that don't appear as you might wish. It also has some characters that can't be accessed using a normal keyboard. However, there are ways to get round these difficulties, depending on your keyboard and operating system, as follows:

12.1 Windows Operating System

The following notes are for MS Windows users:

12.1.1 Alt Codes

If you have a numeric keypad on your keyboard, you can get some of the symbols by entering the <Alt> codes from the Windows Character Map. Hold down the <Alt> key and enter the 4-digit code on the numeric keypad. (This method won't work on the number keys at the top of your keyboard.)

The correct characters are also given below as samples so that you can copy/paste them when needed.

12.1.2 Double Spaces

For the DM sans font used in SiteWorks, we think text looks better, and is easier to read, with a double-space between sentences. Unfortunately, the underlying WordPress software doesn't agree, and simply removes extra spaces when it finds them. You can use the following work-around: Between sentences, use a "non-breaking space" and a standard space. The non-breaking space is created by pressing <Ctrl><Shift>+<Space>. It looks the same as a standard space but doesn't disappear on the website.

Always make the non-breaking space the first one, to avoid indentation if the sentence-break comes at the end of a line.

Symbol	Keyboard	Character Map code	Sample
Non-breaking space	<Ctrl><Shift>+<Space>	0160	

12.1.3 Non-breaking Hyphen

Similar to the above, if you want to insert a hyphen that does not break if it happens to be at the end of a line, you can use the following character:

Symbol	Keyboard	Character Map code	Sample
Non-breaking hyphen	(not possible)	(none)	-

12.1.4 Apostrophe

Most often, the apostrophe is used for opening and closing single quotation marks. But in the DM-sans font the apostrophe is not just the usual vertical line, so does not give the intended result, particularly for the opening mark.

Symbol	Keyboard	Character Map code	Sample
Single quotation opening	(not possible)	0145	'
Single quotation closing	(not possible)	0146	'

12.1.5 Double-quotes

The <Shift>+<2> combination for double quotation marks does not yield a pleasing result for double quotation marks.

Symbol	Keyboard	Character Map code	Sample
Double quotation opening	(not possible)	0147	“
Double quotation closing	(not possible)	0148	”

12.2 Apple Operating Systems

The following notes are for users of Apple computers:

[This section is under construction. It is known that some of the methods described above for Windows do not work with Apple Operating Systems. Readers are invited to submit to the author their solutions for generating special characters].

13 ADVANCED BLOCKS

Now that you have a good grounding in the basics of creating and editing, you can go on to experiment with some more advanced topics.

There is a more comprehensive list of Block types in the Reference Manual. You are particularly recommended to take a look at the following:

- **Excerpt Block:** In section 6.5 we showed how the system will automatically generate an Excerpt for an Event or Post, and you learned how to replace the automatic text with text of your own. Unfortunately, there are some limitations to how Excerpt work, which you may come across. To get round these limitations you can use the Excerpt block.
- **File Block:** In section 8.4 you learned how to create a link to a document uploaded to the media library. An alternative way to do this is to use the File block. It works in a very similar way to the Image block.
- **Rows, Stacks and Grids:** We have described the Columns block in section 5.11 . There are other blocks that allow you to arrange Blocks on the page automatically. They are the Row, Stack and Grid blocks.
- **Table Block:** This allows you to create a grid of Paragraphs.

13.1 Additional Pages

One page is generally sufficient for most Groups, but if you feel that you have too much material for one page it is possible for the Webmaster to create more pages for you, that can then be linked to from your main page, as described in section 8.3 . Please discuss your requirements with the Webmaster.

14 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	Corrected typos. Added Image replacement, shortcuts, buttons.
3	2024-09-05	Dave Willis	Adjustments made for South Solihull specifics.
4	2024-09-13	Dave Willis	Re-structured, and new sections added.
5	2024-09-28	Terry Powderhill	Layout re-formatted for consistency.
6	2024-10-04	Terry Powderhill	Further re-organised to match training course and more details added.
7	2024-10-08	Terry Powderhill	Missing graphics added back in. Further re-sequencing.
8	2024-10-17	Terry Powderhill	Updated with lessons learned from 2 nd Author's course.
9	2024-10-22	Terry Powderhill	More updates including how to move Blocks.
10	2024-10-29	Terry Powderhill	Typographical changes. Password rules clarified. Additional self-study material added.
11	2024-11-01	Terry Powderhill	Minor corrections.
12	2024-11-06	Terry Powderhill	Use of Placeholders on Group Page clarified. Sections on Links and Buttons expanded and re-organised. Formatting corrections.
13	2025-01-27	Terry Powderhill	Added: Notes re. Additional pages. Added Notes re. Descriptions in Image Metadata. Added Section on known bugs. Added Section on image file formats.
14	2025-03-30	Terry Powderhill	Added note re. end date/time of Events. Added section for special characters on Apple Computers (incomplete).
15	2025-07-27	Terry Powderhill	Length of automatic and manual Excerpts clarified. Operation of Excerpt Block clarified. Added note re. linking to named u3a Contacts.
16	2025-11-13	Terry Powderhill	Procedure for replacing a document added.
17	2026-01-09	Terry Powderhill	Basic training shortened and simplified by removing: Table Block, Gutenslider Block, Excerpts Block, Known Bugs. Note concerning Reference Manual added and typographic conventions altered to be consistent with Reference Manual
18	2026-01-18	Terry Powderhill	'Duplicate' function replaced by 'Clone' function.
19	2026-01-28	Terry Powderhill & Dave Willis	Several spelling and typographical corrections.