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## 1 Introduction

To make sure things run as smoothly as possible when your SiteWorks site goes live the SiteWorks team have compiled a checklist of administrative and site setup actions.

Do read all the Checklist first as starting some of the actions early will save time down the line. While there are many points covered in this document, most only need to be done once and your Migrator is on hand to guide you.

A note on terminology. The difference between a 'Production site' and a 'live' site is that a 'live' site is a 'Production site' with the content publicly visible on the Internet and can be located by search engines and links from elsewhere. If you have a Site Builder site, then take advantage of the re-direction of Web traffic service from your Site Builder site to SiteWorks as part of going live.

Familiarise yourself with the SiteWorks Operational Procedures *Web Managers > Operational Procedures (PDF)* on <https://siteworks.u3a.org.uk>

## 2 Checklist and actions

Do read through these now – some, such as choosing a subdomain name, usually require consultation with colleagues.

3 Site Builder pre-migration	
<input type="checkbox"/>	The Workbook for Web Managers references a checklist to prepare your Site Builder site for a smoother migration. Find it here <a href="https://siteworks.u3a.org.uk">https://siteworks.u3a.org.uk</a> then <i>Web Managers &gt; Pre-Migration Checklist</i>
<input type="checkbox"/>	When looking at your migrated Site Builder site on Local WP remember that changes you make will need to be re-done on your production site.
<input type="checkbox"/>	If you have a domain name that will need to be changed to point to your SiteWorks site, make sure your u3a has access to the ISP/registrar to do this.

4 Site creation information needed by your Migrator	
<input type="checkbox"/>	The name of the u3a (or Network/Region) to appear on your website heading. This is the Site Title and can be changed. It is important in that it is used by search engines as keywords for your site.
<input type="checkbox"/>	Your choice of subdomain <subdomain>. u3asite.uk e.g. runnymede.u3asite.uk <i>Important – this cannot be changed once your site is setup (see <b>Note 1</b>)</i>
<input type="checkbox"/>	Your decision on a Starter site or a Site Builder Migrated site (Network/Regions sites for the time being get a Starter site)
<input type="checkbox"/>	The forename and surname of the u3a website manager (if not you)

<input type="checkbox"/>	The email address of the Web Manager (if not you). This must not be a Trust email address; these end in u3a.org.uk, e.g. @u3a.org.uk @siteworks.u3a.org.uk @beacon.u3a.org.uk
<input type="checkbox"/>	The preferred login name of the website manager (see <b>Note 2</b> )
<input type="checkbox"/>	If you have a Site Builder or other site, decide on whether to freeze updates or have a means of recording updates while your SiteWorks site is setup.

## Notes:

1. Domain names can only contain lower case letters a-z, numbers 0-9 and hyphens '-'. No other characters are allowed. Domain names cannot be changed once allocated to a site.
2. Login name must be at least 10 characters long and not be the same as or similar to their name or email to reduce the risk of account names being guessed. Please use upper- and lower-case letters, numbers, - and \_ as other characters may not be acceptable to WordPress.

<b>5 Site setup once you have a production site created</b>	
<input type="checkbox"/>	Plan additional WordPress user(s) and their role(s) to help you prepare content, typically those who run Groups. Bear in mind <b>Note 2</b> above.
<input type="checkbox"/>	The SwDevAdmin user account must not be removed or altered.
<input type="checkbox"/>	Review section <b>8 Site Setup</b> below
<input type="checkbox"/>	Complete edits and updates. See <b>9 Site content editing and checks</b> . You can open your site for periods (take out of maintenance mode) so that colleagues can proofread your site. Note that some updates are not obvious from a visual inspection.
<input type="checkbox"/>	Your site will have a generic version of the Website Terms of Use (the page 'Website Terms of Use'. This document <b>MUST</b> be edited to replace the required text. There is more detail in your training Workbook. Note that smaller u3as won't have a charity number.

<input type="checkbox"/>	<p>For a migrated site, if your Migrator has alerted you of specific Site Builder content to check pay particular attention to those pages.</p>
<input type="checkbox"/>	<p>We recommend that you invite your Migrator to review your site at this stage.</p>
<input type="checkbox"/>	<p>Consider editing your 'Page 404' (page not found) to assist those who arrived through Site Builder redirections or 3<sup>rd</sup> party site links that don't map onto your SiteWorks site.          The 'Page 404' lives in a special place, on the Dashboard select Appearance &gt; Editor &gt; Templates &gt; Page 404.          See FAQ 'What happens to links and bookmarks to a migrated Site Builder site?' here <a href="https://siteworks.u3a.org.uk/faqs/">https://siteworks.u3a.org.uk/faqs/</a></p>
<input type="checkbox"/>	<p>The WordPress Users SwDevAdmin account is required for monitoring and updating your site and <b>must not be removed or altered</b>.</p>

<h2>6 Going live (make your site visible)</h2>	
<input type="checkbox"/>	<p>Your Business Secretary (or other Officer) must notify the Trust of your live SiteWorks site using the u3a Portal. Refer them to <a href="https://www.u3a.org.uk/committee-details-portal">https://www.u3a.org.uk/committee-details-portal</a></p>
<input type="checkbox"/>	<p>If you have a Site Builder site, then confirm with the Site Builder team the redirection to your SiteWorks site. Contact is U3ASiteBuilder Support <a href="mailto:sitebuilderu3a@googlemail.com">sitebuilderu3a@googlemail.com</a></p>
<input type="checkbox"/>	<p>If you have a domain name, then arrange for it to point to your SiteWorks site</p>
<input type="checkbox"/>	<p>Search engine visibility needs to be enabled to encourage search engines to index your site (Settings ⇒ Reading ⇒ Untick the Search engine visibility box) and see <b>10 Actions before going live</b> below</p>
<input type="checkbox"/>	<p>Disable maintenance mode to make your site visible on the Internet see <b>10 Actions before going live</b> below.</p>
<input type="checkbox"/>	<p>Review 3<sup>rd</sup> party links to your Site Builder site and if necessary, contact the owners to update them to reference your SiteWorks site. See <b>12 Appendix – Identify important 3rd party links</b> for guidance.</p>

<input type="checkbox"/>	For support visit the User Guide <a href="https://siteworks.u3a.org.uk/user-guide-betterdocs">https://siteworks.u3a.org.uk/user-guide-betterdocs</a> where there is also information on the Help Desk
<input type="checkbox"/>	Make sure users you have added or add in the future familiarise themselves with the Operational Procedures. See <i>Web Managers &gt; Operational Procedures (PDF)</i> on the siteworks.u3a.org.uk website.
<input type="checkbox"/>	Do make sure your Migrator is aware you are live so we can update our records.
<input type="checkbox"/>	Finally complete the Process feedback form referenced in your Workbook

## 7 Ongoing once live (especially Networks/Regions)

<input type="checkbox"/>	Most sites have links to other u3as, especially Network and Regional sites. Regularly check and update these links for Site Builder URLs that are redirecting to SiteWorks or are broken as the 3 month re-direction service has expired.
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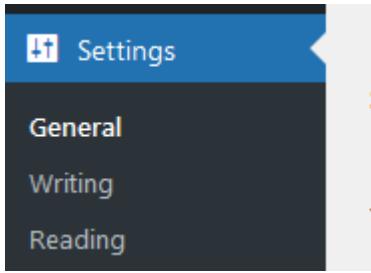
## 8 Site Setup

When you have tidied up your Site Builder site your Migrator will request a production site to be created for you with the details listed above in 4 Site creation information needed by your Migrator

The SiteWorks Sysadmin team will email administration login credentials directly to you as the Web Manager (WM). They will also inform your Migrator but do not include login credentials. With a migrated site your Migrator will pass on any system generated migration comments – in general these will be to double check that specific migrated pages look right.

Before editing content there are some sites settings to be aware of on the live site.

On the Dashboard menu select **Settings > General**



## 8.1 General settings

[Help](#)

### General Settings

Settings saved.

**Site Title**

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

**Site Icon**

Change site icon
Remove 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 x 512 pixels.

**WordPress Address (URL)**

**Site Address (URL)**   
Enter the same address here unless you [want your site home page to be different from your WordPress installation directory.](#)

**Administration Email Address**  **Do not change**  
This address is used for admin purposes. If you change this, an email will be sent to your new address to confirm it. The new address will not become active until confirmed.

**Membership**  **Do not change**

You can set the Site Title – this appears on the header of pages and posts.

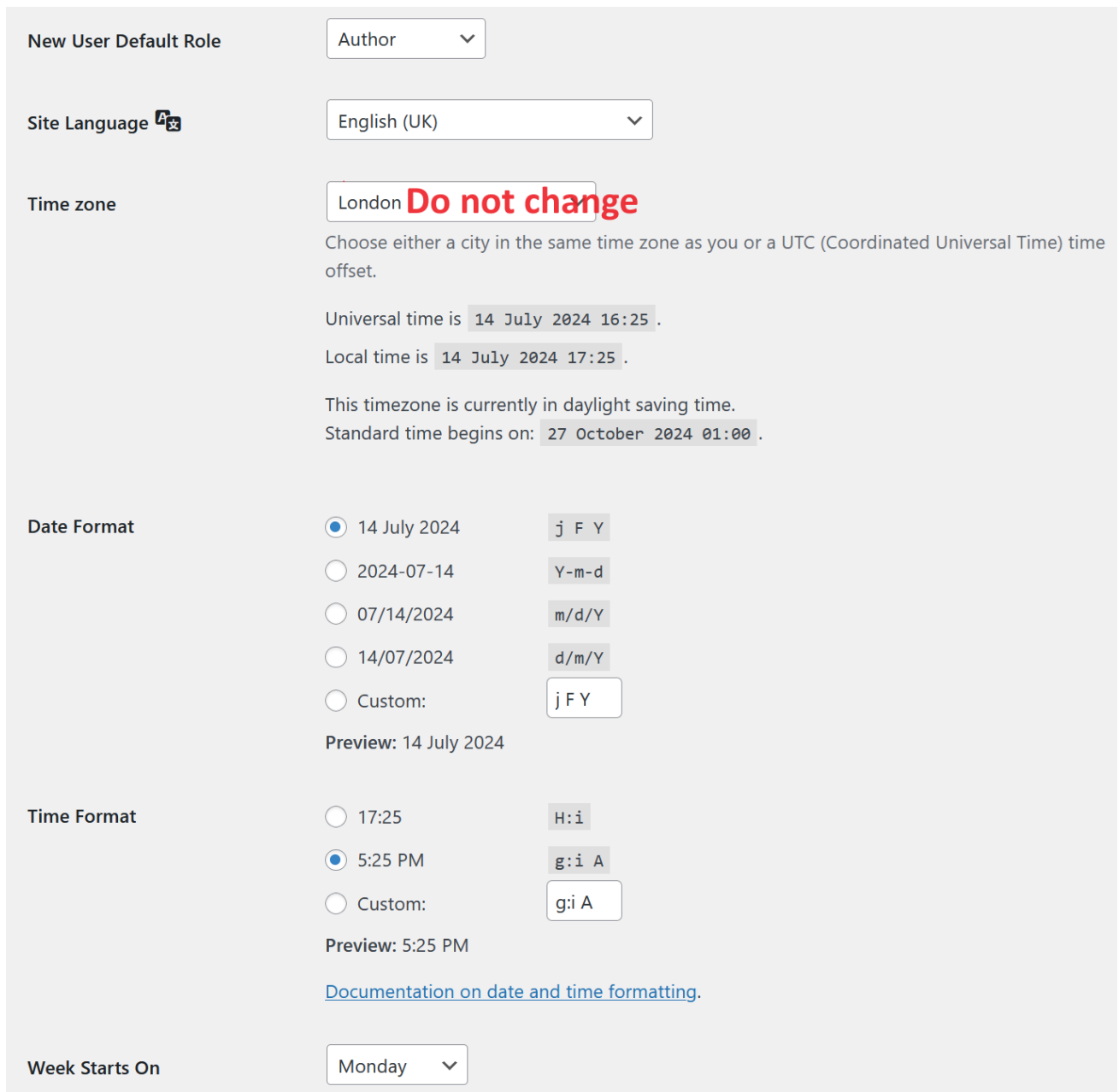
The Tagline can be used for keywords that search engines may well take note of (the technical term is the HTML <title> tag content).

You can add your own site icon. This is shown on browser tabs and Internet search results.

Do not change the Administration Email Address. This is used by SiteWorks support to monitor your site for potential problems.

Changing Membership has no effect with the SiteWorks configuration.

General Setting second half:



The screenshot shows the 'General Setting second half' configuration page. It includes the following sections:

- New User Default Role:** A dropdown menu set to 'Author'.
- Site Language:** A dropdown menu set to 'English (UK)'.
- Time zone:** A dropdown menu set to 'London'. A red warning text 'Do not change' is overlaid on the selection. Below this, there is explanatory text: 'Choose either a city in the same time zone as you or a UTC (Coordinated Universal Time) time offset.' It also shows 'Universal time is 14 July 2024 16:25 .' and 'Local time is 14 July 2024 17:25 .' Additionally, it states 'This timezone is currently in daylight saving time. Standard time begins on: 27 October 2024 01:00 .'.
- Date Format:** A list of radio buttons for date formats: '14 July 2024' (selected), '2024-07-14', '07/14/2024', '14/07/2024', and 'Custom:'. Each format has a corresponding input field showing its pattern (e.g., 'j F Y', 'Y-m-d', 'm/d/Y', 'd/m/Y', 'j F Y'). A 'Preview' shows '14 July 2024'.
- Time Format:** A list of radio buttons for time formats: '17:25', '5:25 PM' (selected), and 'Custom:'. Each format has a corresponding input field showing its pattern (e.g., 'H:i', 'g:i A', 'g:i A'). A 'Preview' shows '5:25 PM'. A link for '[Documentation on date and time formatting.](#)' is provided.
- Week Starts On:** A dropdown menu set to 'Monday'.

You can change the default role when users are added.

Don't change the Time zone. Note that 'London' respects UK daylight saving.

You can change date and time formats but be aware the appearance will change for both website and administration pages.



## 8.2 Writing settings

help

### Writing Settings

Default Post Category

Default Post Format

#### Post via email

To post to WordPress by email, you must set up a secret email account with POP3 access. Any mail received at this address will be posted, so it's a good idea to keep this address very secret. Here are three random strings you could use: `iCLn6BYD`, `WUe85b4i`, `tGLsveKD`.

Mail Server  Port

Login Name

Password

Default Mail Category

#### Update Services

When you publish a new post, WordPress automatically notifies the following site update services. For more about this, see the [Update Services](#) documentation article. Separate multiple service URLs with line breaks.

Be aware that changing Writing settings will affect all content editors.

Do not configure 'Post via email' section, it poses a serious security risk to your site.

u3as are very unlikely to have need of Update Services.

## 8.3 Reading settings

## 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.

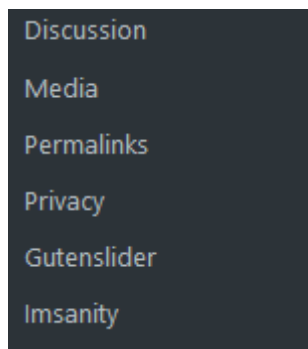
[Save Changes](#)

The homepage settings set what a visitor sees when they land on your website. Note that this also sets the page associated by the template 'Front Page'.

Search engine visibility indicates to search sites (Google, Bing etc.) whether your site should be indexed. If the purpose of your site is only to service your members and you don't want it easily found with an internet search, then leave this ticked.

If it is to attract new members, then un-tick the box (as on the screen shot) as this will help prospective members find your site.

## 8.4 Other settings



Do not change any of these settings.

Note that the Discussion setting has no effect on a SiteWorks configuration.

Do not change any setting associated with plugins.

## 9 Site content editing and checks

While a visual check by colleagues will pick up content accuracy there are some details that can be less obvious. The *User Guide > General Information > Migration and Publishing a u3a Website* has more detail on some of these points.

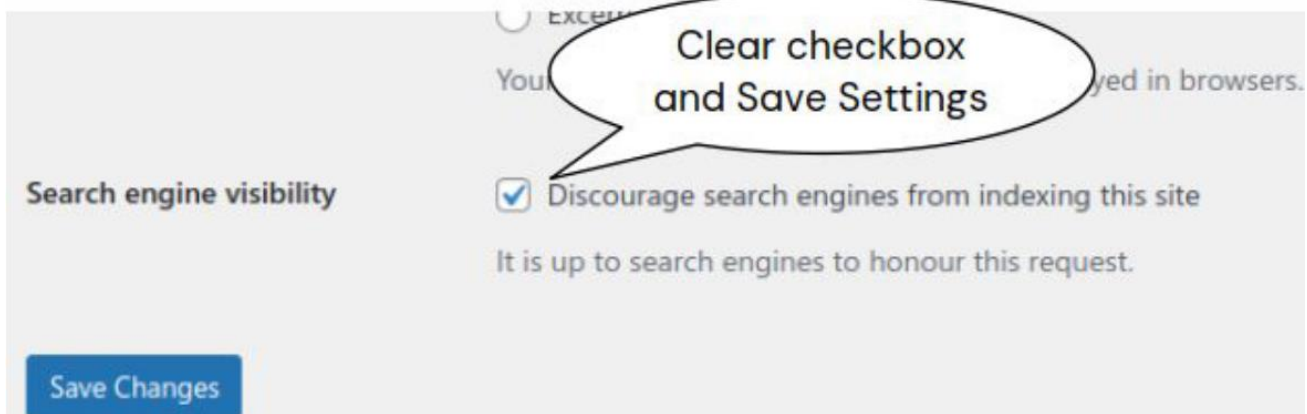
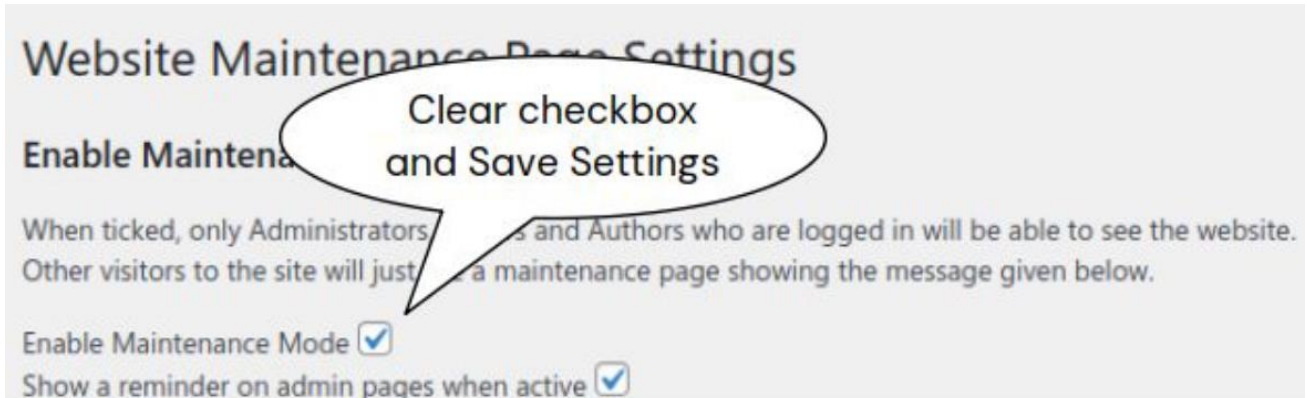
<input type="checkbox"/>	<p><b>Migrated site.</b> Classic blocks should be converted to component blocks. WordPress offers this when migrated pages are edited. This is important because it improves the visitor experience, especially on smartphones. For more detail see the <i>User Guide &gt; General Information &gt; Migration</i></p>
<input type="checkbox"/>	<p><b>Smartphone.</b> Check does your site work as expected on a smartphone or small tablet? Look for how WordPress blocks stack. You can test this with your browser on a desktop/laptop, this article explains how:  <a href="https://its.uri.edu/services/946442a2ab7e3cfc0d9034469b32186c7fad400e8/simulating-a-mobile-environment-in-a-browser/">https://its.uri.edu/services/946442a2ab7e3cfc0d9034469b32186c7fad400e8/simulating-a-mobile-environment-in-a-browser/</a></p>
<input type="checkbox"/>	<p><b>Links and new browser tabs.</b> When opening a link to another website or PDF it can be annoying to the visitor that the back button is the only way to return to your site. Editing links to open in a new tab will make sure your site is always available to return to. One way to do this is tick 'Open in new tab' when editing a link:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input checked="" type="checkbox"/> Open in new tab         </div>

<input type="checkbox"/>	<p><b>Add Venues</b> as necessary using the plugin and then edit Groups and Events to reference a venue.</p>
<input type="checkbox"/>	<p><b>Contact page form.</b> It will need to be configured to capture basic information and hide contact email addresses – see <i>User Guide &gt; Navigation and Emails &gt; Email</i>. While the basic text etc. of this page is migrated, the names/roles and just a way to raise a general enquiry needs to be configured.</p>
<input type="checkbox"/>	<p><b>Terms of use.</b> Your site has a generic version of the Website Terms of Use. This document <b>MUST</b> be edited to replace the required text. There is more detail in your training Workbook. Make sure these are tailored for your u3a, including adding your Privacy Policy document link. Make sure the footer banner links to your Terms of Use..</p> <div data-bbox="252 813 938 936" style="background-color: #0056b3; color: white; padding: 5px; text-align: center;"> <p>Theme developed by u3a SiteWorks team  <a href="#" style="color: white; text-decoration: underline;">Website Terms of Use</a></p> </div>
<input type="checkbox"/>	<p><b>Image Alternative text.</b> This is required to make a site accessible and is a factor in achieving good search engine results. The <i>User Guide &gt; Editing and Blocks &gt; Inserting Images</i> gives details, but essentially provide alternative text such as 'u3a logo', 'Chair – Dee Walker', 'Group visiting local museum of culture'</p>
<input type="checkbox"/>	<p><b>Copyright.</b> Do make sure none of your content (usually images) infringes copyrights. For photographs of people make sure you have their consent.</p>

## 10 Actions before going live

To recap, prior to making your site publicly visible the following actions are required:

- Disable maintenance mode. From u3a settings ⇒ Maintenance mode ⇒ Untick the Enable Maintenance Mode box (screenshot below)
- Search Engine Visibility. To ensure that the site will be found by search engines, from Settings ⇒ Reading ⇒ Untick the Search Engine Visibility box<sup>2</sup> (screenshot below)
- The WordPress Users SwDevAdmin account is required for monitoring and updating your site and **must not be removed or altered**.



## 11 Appendix – Site Builder planning

When your SiteWorks site becomes publicly visible, traffic from Site Builder can be redirected to your new site. As the site owner you (and not your Migrator) need to request this from Site Builder support ([sitebuilderu3a@googlemail.com](mailto:sitebuilderu3a@googlemail.com)).

With a Migrated site there is a mapping from Site Builder to SiteWorks so that, for example, a visitor who goes directly to a Site Builder Groups page can be automatically landed on the equivalent SiteWorks page.

Note that, for the period when redirection is to be relied on, if the names of the SiteWorks landing pages (e.g. Welcome, Groups pages) are changed the redirected visitor sees 'Page not found' (the 404 page).

To see how this will work in advance, Site Builder support have added a 'Migration' preview facility.

Login to your Site Builder site and select 'ADMIN MENU' and then 'MIGRATION'. On the 'Help' screen you can enter your subdomain name if you wish to change the default. 'Page redirection' will display where visitors to Site Builder pages will end up on SiteWorks (new URL).

Here is an example of the report:

**ADMIN MENU**

**COLOURS**

**BUTTONS**

**CUSTOMISATION**

**EXTRAS**

**EDITORS**

**UTILITIES**

---

**MIGRATION**

[Help](#)

[Trial export](#)

[Page redirection](#)

**MAIN MENU**

**VIEW FULL SITE**  
*(in a new window)*

**LOG OUT**

### Hammersmith & Fulham: Page Forwarding Addresses

*At migration the names for group pages were derived from the relevant group names rather than the original page headers. These are shown in the list below if there was a difference between the two names.*

Page Name	Group Name	New URL
<a href="#">Contact</a>	...	<a href="https://blueberry.u3asite.uk/contact/">https://blueberry.u3asite.uk/contact/</a>
<a href="#">Front Page</a>	...	<a href="https://blueberry.u3asite.uk">https://blueberry.u3asite.uk</a>
<a href="#">Groups</a>	...	<a href="https://blueberry.u3asite.uk/groups/">https://blueberry.u3asite.uk/groups/</a>
<a href="#">Links</a>	...	<a href="https://blueberry.u3asite.uk/links/">https://blueberry.u3asite.uk/links/</a>
<a href="#">Monthly Speakers</a>	...	<a href="https://blueberry.u3asite.uk/events/">https://blueberry.u3asite.uk/events/</a>
<a href="#">Welcome</a>	...	<a href="https://blueberry.u3asite.uk/welcome/">https://blueberry.u3asite.uk/welcome/</a>
<a href="#">Join Us</a>	...	<a href="https://blueberry.u3asite.uk/join-us/">https://blueberry.u3asite.uk/join-us/</a>
<a href="#">Policies</a>	...	<a href="https://blueberry.u3asite.uk/policies/">https://blueberry.u3asite.uk/policies/</a>
<a href="#">Archaeology</a>	...	<a href="https://blueberry.u3asite.uk/groups/archaeology/">https://blueberry.u3asite.uk/groups/archaeology/</a>
<a href="#">Armchair Travel</a>	...	<a href="https://blueberry.u3asite.uk/groups/armchair-travel/">https://blueberry.u3asite.uk/groups/armchair-travel/</a>

## 12 Appendix – Identify important 3<sup>rd</sup> party links

The Site Builder redirection service will ensure 3<sup>rd</sup> party links to your Site Builder site will automatically reach your new SiteWorks site. However, this is only a means to give you time to address important links to your site as after 2 months the redirection service will be switched off. You will need to identify these links so you can contact the site owners to update them.

Even if you have your own domain registered there could be some links that use the *u3asites.org.uk/u3asitename* reference – perhaps they pre-date your domain.

Also, don't forget to regularly check links from your site to other Site Builder u3as – they may overlook informing you of the SiteWorks move.

### 12.1 Locating links to Site Builder

You can use your preferred search engine to locate the links to your Site Builder site. Go to the home page of the search engine (google.com, bing.com etc.) and type in the body of your Site Builder URL. For example, *u3asites.org.uk/hammersmith-fulham* – do not do this in the address bar of your browser as this will simply land you on your Site

Builder site and, if setup, re-direct you to SiteWorks. Don't just type in your u3a name as this will include SiteWorks hits and muddy your results.

The search results will list sites with link(s). You will need to skip results that originate from within your Site Builder site. Check each result and decide how important it is to contact them with a request to update their link.

Some specific sites to check:

- If you use Beacon, then update the System setting's u3a Home page and other references to Site Builder (this won't be picked up by the search)
- Notify your Network u3a and/or Regional u3a site admins
- If you are registered with the Charity Commission their contact information needs updating
- Check local community organisations, councils etc. although these should show up in your search results.

## 13 Revision History

Version	Date	Author	Change summary
1	2023-10-28	Graham Tigg	Extracted from Migration team guide
2	2023-11-03	Graham Tigg	Added feedback form
3	2023-11-06	Graham Tigg	Added u3a portal register live site
4	2023-11-06	Graham Tigg	Typos. Reorganise actions.
5	2023-11-09	Graham Tigg	Tweaks
6	2023-11-24	Graham Tigg	Section on fixing Site Builder links
7	2023-12-12	Graham Tigg	Clarified 'Page 404'
8	2023-12-17	Graham Tigg	Updated installed plugins.
9	2023-12-22	Graham Tigg	More on going live – suggestion that the Migrator checks the site.
10	2024-01-04	Graham Tigg	Separated out the Site Operating Instructions as these apply to live sites.
11	2024-01-07	Graham Tigg	Need to be aware ref SB redirection to retain SW page names.
12	2024-01-17	Graham Tigg	Added reminder to look at the SB pre-migration checklist.
13	2024-02-07	Graham Tigg	Email address for site cannot be a Trust one..
14	2024-02-22	Graham Tigg	Added final site checks
15	2024-02-26	Graham Tigg	Added note on privacy policy, copyright, Operating procedures
16	2024-03-28	Graham Tigg	Clarifications
17	2024-04-19	Graham Tigg	Reference User Guide on setting up Terms of Use on the footer.
18	2024-04-28	Graham Tigg	Added setting screenshot for WP 6.4 with icon option. General clarifications.
19	2024-05-19	Graham Tigg	Typos and more general clarifications.
20	2024-07-14	Graham Tigg	Clarifications and updated screenshots.
21	2024-07-22	Graham Tigg	Added let Migrator know when live
22	2024-08-28	Graham Tigg	Note to Networks/Regions, and u3as, to frequently check redirected links to u3as as they may be on SW.