u3a SiteWorks Go Live instructions

Contents

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 Supporter 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.

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.

These actions assume the reader is creating a site for a u3a, but it equally applies to Network and Regional sites.

3 Does your u3a have a Domain name	
☐	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 now.

4 Site creation information needed by your Supporter	
☐	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.
☐	Your choice of subdomain <subdomain>. u3asite.uk e.g. runnymede.u3asite.uk *Important – this cannot be changed once your site is setup* (see **Note 1**)
☐	The forename and surname of the u3a website manager (if not you)
☐	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
☐	The preferred login name of the website manager (see **Note 2**)
☐	If you already have a website decide on whether to freeze updates or have a means of recording updates while your SiteWorks site is setup.

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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.

5 Site setup once you have a production site created	
☐	Plan additional WordPress user(s) and their role(s) to help you prepare content, typically those who run Groups. Bear in mind **Note 2** above when setting their Usernames.
☐	The SwDevAdmin user account must not be removed or altered.
☐	Review section **8 Site Setup** below
☐	Complete edits and updates. See **9 Site content editing and checks**. You can open your site for periods (take out of maintenance mode) so that colleagues can proofread your site – only those given the address (URL) will see it.
☐	Your site will have a generic version of the Website Terms of Use (the page 'Website Terms of Use'. It is a Draft page and **MUST** be edited to replace the required text and Published. Note that smaller u3as won't have a charity number. If you don't know it search for "your u3a name charity" and the GOV.UK Charity Commission site should appear first. Do not use the charity number of the Third Age Trust. Once Published you will see he link on the footer ribbon. Theme developed by u3a SiteWorks team Website Terms of Use
☐	We recommend that you invite your Supporter to review your site at this stage.

☐	Consider editing your 'Page 404' (page not found) to assist those who in future arrive through 'broken' links that no longer map onto your SiteWorks site (perhaps because a page gets deleted at some stage) The 'Page 404' lives in a special place, on the Dashboard select Appearance > Editor > Templates > Page 404.

6 Going live (make your site visible)

☐	Disable maintenance mode to make your site visible on the Internet See **10 Actions before going live** below.
☐	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 **10 Actions before going live** below
☐	Your Business Secretary (or other Officer) must notify the Trust of your live SiteWorks site using the u3a Portal. Refer them to https://www.u3a.org.uk/committee-details-portal
☐	Make sure users you have added, or add in the future, familiarise themselves with the Operational Procedures. See **Web Managers > Operational Procedures (PDF)** on the siteworks.u3a.org.uk website.
☐	Do make sure your Supporter is aware you are live so we can update our records.
☐	Please complete the Process feedback form referenced in the Foundation Guide.
☐	If you have a domain name arrange for it to point to your SiteWorks site.
☐	If you previously had a website then review 3rd party links to your old site (e.g. local Councils, neighbouring u3as) and consider contacting the owners to update them to reference your SiteWorks site. See **11 Appendix – Identify important 3rd party links** for guidance.
☐	For support visit the SiteWorks website https://siteworks.u3a.org.uk

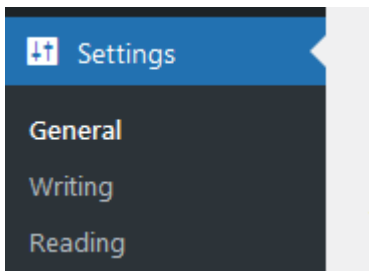| 7	Ongoing once live (especially Networks/Regions)
☐	Your site will have links to other u3as, especially Network and Regional sites. Regularly check and update these links as necessary.

8 Site Setup

Your Supporter will request a production site to be created for you with the details listed above in 4 Site creation information needed by your Supporter

The SiteWorks Sysadmin team will email administration login credentials directly to you as the Web Manager (WM). They will also inform your Supporter but do not include login credentials.

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

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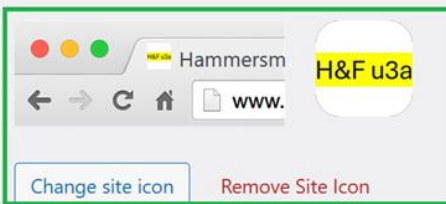
8.1 General settings

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 not 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:

New User Default Role	Author ⌄
Site Language 🅰🈂	English (UK) ⌄
Time zone	London **Do not change**

Choose either a city in the same time zone as you or a UTC (Coordinated Universal Time) time offset.

Universal time is 14 July 2024 16:25 .

Local time is 14 July 2024 17:25 .

This timezone is currently in daylight saving time.
Standard time begins on: 27 October 2024 01:00 .

Date Format
- ⦿ 14 July 2024   j F Y
- ◯ 2024-07-14   Y-m-d
- ◯ 07/14/2024   m/d/Y
- ◯ 14/07/2024   d/m/Y
- ◯ Custom: j F Y

Preview: 14 July 2024

Time Format
- ◯ 17:25   H:i
- ⦿ 5:25 PM   g:i A
- ◯ Custom: g:i A

Preview: 5:25 PM

[Documentation on date and time formatting](#).

Week Starts On   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

Writing Settings

Default Post Category	Newsletter ⌄
Default Post Format	Standard ⌄

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	Do not change	Port `0`
Login Name	Do not change	
Password	Do not change 👁	
Default Mail Category	Uncategorized ⌄	

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.

Save Changes

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: | Welcome ∨ |

Posts page: | – Select – ∨ |

Blog pages show at most | [10 ⇕] posts |

Syndication feeds show the most recent | [10 ⇕] 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.
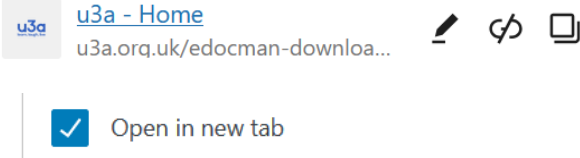
8.4   Other settings
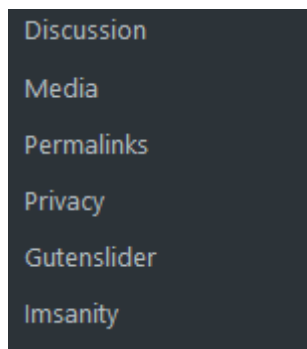
Do not change any of these settings.

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 inaccuracies, 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.

☐	**Smartphone.** Does your site works 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: https://its.uri.edu/services/946442a2ab7e3cfcb0d9034469b32186c7fad400e8/simulating-a-mobile-environment-in-a-browser/
☐	**Links and new browser tabs.** 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 (click the pencil icon to reveal):
☐	**Add Venues** as necessary (Dashboard u3a Venues) and then edit u3a Groups and u3a Events to reference a venue.

☐	**Contact Us page form.** Needs to be edited and configured to capture basic information and hide contact email addresses – see **User Guide › Navigation and Emails › Email.**
☐	**Image Alternative text.** This is required to make a site accessible and is a factor in achieving good search engine results. The **User Guide › Editing and Blocks › Inserting Images** gives details, but essentially provide alternative text such as 'u3a logo', 'Chair – Dee Walker', 'Group visiting local museum of culture'
☐	**Copyright.** Do make sure none of your content (usually images) infringes copyrights. For photographs of people make sure you have their consent.

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 box2 (screenshot below)

- The WordPress Users SwDevAdmin account is required for monitoring and updating your site and **must not be removed or altered**.

- Inform the Trust of your new URL using the Committee portal (see 6 Going live (make your site visible)
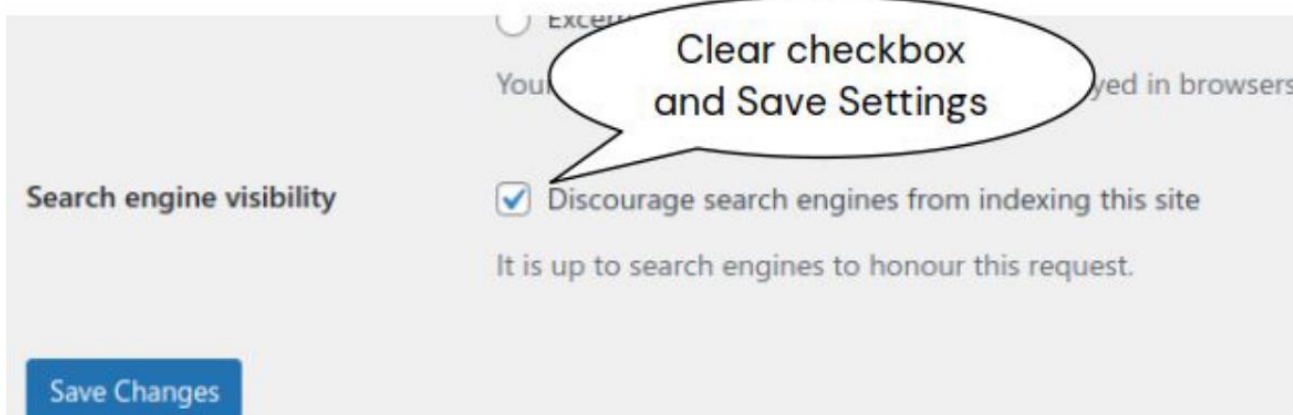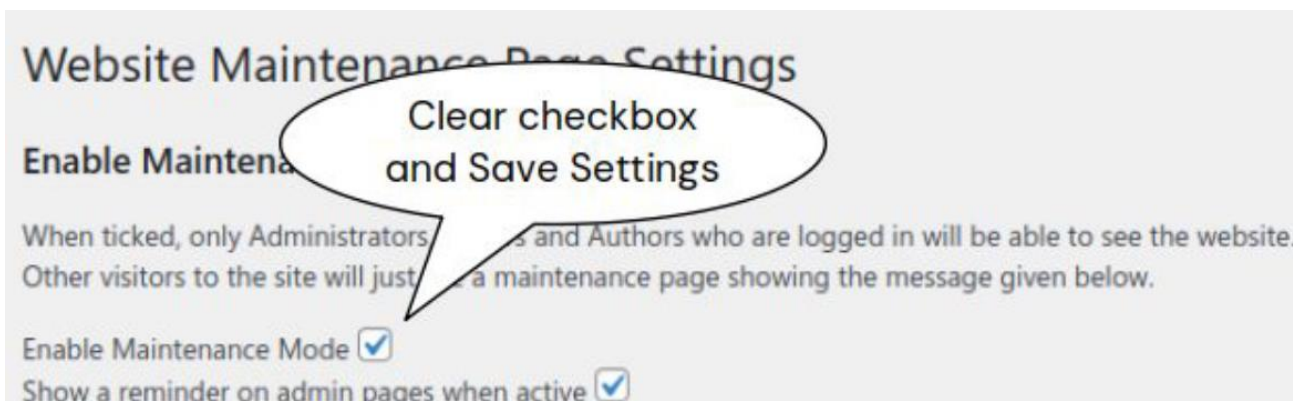
11 Appendix – Identify important 3rd party links

If your u3a previously had a website then it is almost certain that other websites (such as the local Council and neighbouring u3as) will have added links to your site over time. These will often be so called deep links because rather than the link taking the visitor to your home page e.g. anytownu3a.org.uk it takes you to a sub-page e.g. anytownu3a.org.uk/monthlymeets

Assuming anytownu3a.org.uk is a domain you have registered you can of course setup a redirection, but that will always send your visitor to your home page. Also redirections should be viewed as temporary, not least because search sites (Google, Bing etc.) do not rank them highly in their results.

You will need to identify these links so you can contact the site owners to update them.

Don't forget to regularly check links from your site to other u3a sites.

11.1   Locating links to your old site

You can use your preferred search engine to locate the links to your previous site. Go to the home page of the search engine (google.com, bing.com etc.) and type in the body of your previous URL. For example, 'anytownu3a.org.uk' but do not do this in the address bar of your browser as this will simply land you on your old 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 old 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 that may not show up in search results:

- If you haven't already, then your Business Secretary (or other Officer) must notify the Trust of your live SiteWorks site using the u3a Portal. Refer them to https://www.u3a.org.uk/committee-details-portal

- 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 a 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.

12 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.
23	2024-09-26	Graham Tigg	Re-ordered final go-live instructions
24	2024-12-14	Graham Tigg	Re-worked to remove Site Builder references and apply to Starter Sites.