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1 Background

The Migration of Site Builder sites to SiteWorks completed in 2024. Among the 676 sites created there were 27 live sites for u3as that didn't have a Site Builder site. A further 11 were in preparation and 11 more had signed T&Cs.

u3as that contact us for more information before they sign the T&Cs we call prospects.

Post-migration we are expecting a steady flow of Prospects – there is a market of some 300+ u3as not hosted by the Trust. Some use SiteWorks, i.e. the theme and plugins, but applied to WordPress on their own hosting arrangements..

Beacon has a similar number of u3a and Network/Regional sites to SiteWorks and 2 to 4 u3as join every month.

The Site Builder Migration Team transitioned into the Supporters Team in early 2025. Supporters is the same term used by the Beacon team. They assist Web Managers setup SiteWorks Starter Sites as we do now for Prospects. Recording and tracking has been simplified and is done by the Admin team on Beacon (site 'Z SiteWorks email).

This transition of the SiteWorks team was referred to as Business As Usual (BAU).

2 Main Steps for Supporters

New sites are allocated on a roster basis. If you are going be away or unavailable for more than a day or two then let the Admin team know – email info@siteworks.u3a.org.uk (info@) and also remind us when you return.

Assuming the u3a is not already using SiteWorks on another hosting service then the main steps for Supporters are:

1. When a Prospect has signed the T&Cs Admin emails the WM and next available Supporter on the roster. The email introduces the Supporter to the WM and includes a link to the Learning guides and other documentation index page <https://siteworks.u3a.org.uk/implementation-team-guides/web-manager-reference/>
2. We leave the Web Managers (WMs) to briefly study the Learning guides and other material and to get in touch if they have questions.
3. Request subdomain choice and other site setup info (see 3 Emailing the Web Manager). Order a production Starter Site. Do this by emailing both sysadmin-request@u3asite.uk and info@siteworks.u3a.org.uk (info:@) so the Admin team can update Beacon.
4. The WM receives their logon credentials directly from Sysadmin who also inform the Supporter and info@.
5. Assist the WM as appropriate to populate their Starter Site. Check the new site for the presence of Terms of Use and exposure of any personal information etc. Feedback any general design comments to the WM.
6. When the WM makes their site publicly visible inform info@ (this will be picked up later if you are not made aware).
7. After a period (days to a few weeks) ask the WM to start using the Help Desk and Forum for support not covered by their Learning guides and the User Guide.

2.1 Ordering a Production site

Direct the WM to the Go-live checklist where the information we need to create a site is explained.

Two items need some thought:

- The subdomain name part of their full domain (<subdomain>. u3asite.uk). Subdomain names can only contain lower case letters a-z, numbers 0-9 and hyphens '-'. No other characters are allowed. Subdomain names **cannot** be changed once allocated to a site.
- Decide on their site admin logon
It must be at least 10 characters long and not be the same as, or like, their name or email to reduce the risk of account names being guessed. Use upper- and lower-case letters, numbers 0-9, - and _ only.

Email sysadmin-request@u3asite.uk cc: info@siteworks.u3a.org.uk using the title:

[new account] <u3a name>

For example,

[new account] Rosewick & District

Please create a Starter Site using the following details:

- The site title – the name the u3a wish to appear on their website heading e.g. 'Rosewick & District'. This can be changed by the WM later.
- The u3a's choice of subdomain (<subdomain>. u3asite.uk)
- The name of the u3a website manager (forename and surname)
- The email address of the Web Manager
- The preferred login name of the website manager

<sign off>

2.2 SiteWorks sites hosted elsewhere

On a best endeavours basis we can help the WM move a SiteWorks site from their current hosting service to the Trust's hosting. The most proven way to do this is to use the WPVivid plugin with the appropriate settings – the website has notes on this under **Web Manager > 'How to' articles**. The Sysadmin team will need to do the final setup including email connections and MainWP Child.

2.3 Notes on Site Preparation

- The Sysadmin team will send logon details directly to the WM. As the Supporter you and the Admin team (info@) will receive confirmation. The Admin team will update Beacon.
- Ask the Web Manager to consider setting you up as an Administrator until they go live.
- The site will be in 'maintenance mode' and hence not available publicly on the Internet.
- The WM is in control of making their site 'live' by disabling maintenance mode permanently and enabling 'Search engine visibility'.

- Remind the Web Manager to inform 3rd parties of their new website so that links can be setup and their site will be picked up by search engines. The Go-live checklist has more details.
- Remind the Web Manager that their Committee need to update the Trust's record of their new website URL using the Committee details portal on u3a.org.uk.

3 Emailing the Web Manager

3.1 Confirm Site setup parameters

Hi <WM name>,

To setup your production site can you please confirm the following settings:

- The site title – the name the u3a or site you wish to appear on your website heading e.g. 'Anytown and District'. This can be changed later.
- Your choice of subdomain (<subdomain>. u3asite.uk) (see note 1)
- The name of the u3a Web Manager (forename and surname) probably you!
- The email address of the Web Manager (probably yours or a u3a generic address)
- The preferred login name of the website manager (see note 2)

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. Use upper- and lower-case letters, numbers 0-9, - and _ only.

Finally please note that the credentials will be sent directly to yourself from our Sysadmin team and won't be copied in to me.

<sign off>

4 Appendix – post Migration transition

During Site Builder migration the Implementation team covered administration, training and migration. We now have a combined team of Administration and Supporters (ex-Migration) that includes the Help Desk.

Training will be separate and called the more informal Learning. It requires a new lead.

One reason for combining Supporters and the Help Desk into one team is that Supporters have the skills and experience. They make the Help Desk more effective by resolving more queries within the team rather than passing them on to SysAdmin.

The volumes involved with the 2024 migration meant up to 3 sites a day needed a team member allocated. A tracking system we call OP2 was setup to track this. OP2 worked in parallel with the Beacon system (z SiteWork Email) that records information on all sites through their life-cycle. We have decommissioned OP2 and track u3a and site status in Beacon. Note that ideally it should be the other way round as OP2 is more suited to the task, but the ability of Beacon to email the 1000+ Web Managers means we can't do without it.

From a Supporter perspective Beacon records are maintained by the Admin team.

5 Revision History

Ver	Date	Author	Change summary
21	2024-12-22	Graham Tigg	Re-write removing Site Builder migration and other BAU considerations
22	2025-01-10	Graham Tigg	Update Admin process detail
23	2025-01-14	Graham Tigg	Tidy up
24	2025-02-05	Graham Tigg	Supporters can order sites. Move history to Appendix.