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0 Introduction

This document has been compiled to help Website Managers setting up a new SiteWorks website. It is sent to the Website Manager along with an introduction to a Supporter. Your Supporter is usually an experienced u3a Website Manager who has volunteered to be on hand to help and guide you.

We recommend you read all the document first as starting some of the actions early will save time down the line. Also some other actions, such as choosing a subdomain name, usually require consultation with colleagues.

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

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

A note on terminology. Your new site is referred to as a '**Production site**' during the period of setup and editing. When the site is made publicly visible on the Internet and can be located by search engines and links from elsewhere it is then referred to as a '**Live site**'.

1 Phase 1 – Preparation and ordering your site

1.1 Does your u3a have a Domain name

If you have a domain name for an existing website you will need access to the ISP/registrar to redirect to your new SiteWorks site when you go live. Although this is one of the last things you need to do make sure you know who in your u3a has access so it does not cause a delay.

1.2 Updating your current website

Depending on your availability, time and experience setting up your site may take between two weeks and two months (some take longer). So if you already have a website updating both sites during the preparation period is advisable. Decide how you will do this.

1.3 Site creation information needed by your Supporter

1	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.
2	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)
3	The forename and surname of the u3a Web Manager.
4	The email address of the Web Manager. 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
5	The preferred login name of the website manager (see Note 2)

Note 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.

Note 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.

Your Supporter will request a production site to be created for you with these details. The SiteWorks Sysadmin team will email Administration login credentials directly to the Web Manager (WM), usually within 24 hours. They will also inform your Supporter but do not include login credentials.

2 Phase 2 – Site setup, Checks and Content Creation

2.1 Additional WordPress users

If you have an Assistant Web Manager consider making them a user to help you setup. Make them an 'Administrator' to give them full access or an 'Editor' if you wish to restrict them from accessing Settings. Your Supporter may also request to be an 'Administrator' user so they can offer help. Bear in mind **Note 2** above when setting User names.

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

2.2 Access to Learning Guides

Guides to editing your Site can be found on the Siteworks website <https://siteworks.u3a.org.uk/> Under the Web Manager tab the **Foundation Admin Guide** has all the information that an 'Administrator' needs. Also the **Foundation Editing guide** which has reduced content for 'Editors'. If you are intending to give Group Leaders access to edit their Group page this will be as an 'Author' for which you will find the '**Group Authors Guide**'.

2.3 Site Settings

Before editing content there are some site settings to be aware of on the production site. In many cases it is just a matter of not changing the settings.

From the Dashboard start by selecting **Settings>General**.

2.3.1 General Settings

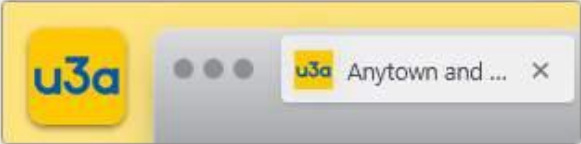
General Settings

Site Title

Tagline

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

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 by 512 pixels.

WordPress Address (URL)

Site Address (URL)

Administration Email Address

 Do Not Change

Membership


☐ Anyone can register **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 System Admin to monitor your site for potential problems.
	Changing Membership has no effect with the SiteWorks configuration.

(General Settings Continued)

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 28 July 2025 21:35 .

Date Format

☐ 28 July 2025

j F Y

☐ 2025-07-28

Y-m-d

☐ 07/28/2025

m/d/Y

☐ 28/07/2025

d/m/Y

☐ 28.07.2025

d.m.Y

☒ Custom:

j F Y

Preview: 28 July 2025

Time Format

☐ 21:35

H:i

☐ 9:35 PM

g:i A

☒ Custom:

g:i a

Preview: 9:35 pm

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

Week Starts On

Monday

Save Changes

	You can change the default role when users are added but it is safer to leave this as Author.
	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.

2.3.2 Writing Settings

From the Dashboard select **Settings > Writing**

Writing Settings

Default Post Category

Uncategorized

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: `a7gewiduT`, `GSXdff2j`, `xVne3A3M`.

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.

2.3.3 Reading Settings

From the Dashboard select **Settings > Reading**

Learn more about feeds.'. At the bottom, there is a 'Search engine visibility' section with a checked checkbox 'Discourage search engines from indexing this site' and a red note 'Change when Going Live'. Below this is the text 'It is up to search engines to honour this request.' and a blue 'Save Changes' button." data-bbox="92 148 905 566"/>

Reading Settings

Your homepage displays

☐ Your latest posts

☒ A [static page](#) (select below) **Do Not Change**

Homepage: **Change if required**

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 **Change when Going Live**

It is up to search engines to honour this request.

[Save Changes](#)

- The homepage setting is what a visitor sees when they land on your website. Note 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. Leave ticked until you have edited your site and you are ready to 'Go Live' Then un-tick the box to help search engines and prospective members to find your site.

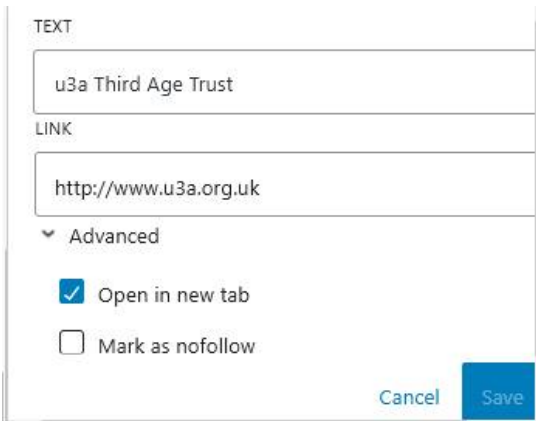
2.3.4 Other Settings

Do not change any of the other settings in the Settings sub-menu. Note that the Discussion setting has no effect on a SiteWorks configuration.

Do not change any setting associated with plugins.

2.4 Checks

You and your other Users should be aware of these **Checks** when editing the site and always apply them. Familiarise yourself with them now during editing to save time later. You and your other Users should also be familiar with the **Operational Procedures**. See Web Managers > Operational Procedures (PDF) on the siteworks.u3a.org.uk website.

	<p>Smartphone. Does your site layout 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: https://its.uri.edu/services/946442a2ab7e3cfc0d9034469b32186c7fad400e8/simulating-a-mobile-environment-in-a-browser/</p>
	<p>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'</p>
	<p>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):</p>  <p>The screenshot shows the WordPress link editor interface. It has a 'TEXT' field containing 'u3a Third Age Trust' and a 'LINK' field containing 'http://www.u3a.org.uk'. Below these is an 'Advanced' section with two checkboxes: 'Open in new tab' (which is checked) and 'Mark as nofollow' (which is unchecked). At the bottom right are 'Cancel' and 'Save' buttons.</p>
	<p>Copyright. Do make sure none of your content (usually images) infringes copyrights. For photographs of people make sure you have their consent.</p>

2.5 Content Editing

You should find everything you need in the Learning Guides provided. In addition to editing the pages provided there are some tips below.

	During site preparation you can take the site out of Maintenance mode for a few days to allow your Committee to review. See 'Disable maintenance mode'.
	A 'Contact' page needs to be created and added to your Navigation. Edit and configure it to capture basic information and hide contact email addresses – see User Guide > Navigation and Emails > Email. Or the 'Committee email contact page' in the Administrator Guide
	Add Venues and Contacts (Group Leaders) as necessary (Dashboard u3a Venues or u3a Contacts). They will then be available when you add and edit u3a Groups and Events which reference Venues and Contacts.
	Consider using the u3a import/export feature to do a bulk upload of Venues, Contacts, Groups, Events.
	<p>Your site will have a generic version of the Website Terms of Use (the page 'Website Terms of Use' in draft). This page MUST be edited to replace the required text and then Published. Smaller u3as may not have a charity number. If you don't know it search the Charity Commission website. Do not use the charity number of the Third Age Trust. Once the page is Published you will see the link on the footer ribbon.</p> <div style="background-color: #0056b3; color: white; padding: 10px; text-align: center;"> <p>Theme developed by u3a SiteWorks team</p> <p>Website Terms of Use</p> </div>
	Consider editing your 'Page 404' (page not found) to assist visitors who arrive through 'broken' links that no longer map onto your SiteWorks site (perhaps because a page gets deleted at some stage). The 'Page 404' can be found from the Dashboard select Appearance > Editor > Templates > Page 404.

3 Phase 3 – Going Live

3.1 Supporter Review

Before going live we recommend that you invite your Supporter to review your site. If they don't have a user login you can take the site out of Maintenance mode for a few days to allow the Supporter review and also your colleagues to review and proof read it – only those given the address (URL) will see it.

3.2 Disable maintenance mode

Disable maintenance mode to make your site visible on the Internet. From u3a settings ⇒ Maintenance mode ⇒ Untick the Enable Maintenance Mode box

Website Maintenance Page Settings

Enable Maintenance Mode

When ticked, only Administrators, Editors and Authors who are logged in will be able to see the website. Other visitors to the site will just see a maintenance page showing the message given below.

Enable Maintenance Mode ☐

Show a reminder on admin pages when active ☒

3.3 Open to search engines

After the review, Search Engine Visibility needs to be enabled to ensure that the site will be found by search engines, from Settings ⇒ Reading ⇒ Untick the Search Engine Visibility box2 (screenshot below)

Search engine visibility

☐ Discourage search engines from indexing this site

It is up to search engines to honour this request.

[Save Changes](#)

3.4 Notifications you must make

	Inform the Trust of your new URL. 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
	Advise your Supporter you are live so we can update our records.
	If you have a domain name arrange for it to point to your SiteWorks site.
	Please complete the Process Feedback Form referenced in the Foundation Guide.

4 Phase 4 – Get your site known

4.1 Redirection

If you have a domain name or previous website, arrange now for it to point to your SiteWorks site. This will help search engines index your new site.

4.2 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/meetings

Assuming anytownu3a.org.uk is your domain 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.

4.3 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.

5 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 the Site Operating Instructions, 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 update 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.
25	2025-08-10	Graham Tigg Frances Kilburn	Re-work by Frances