

Checklist before going live

Project management, Wordpress

Web Skills : 1

Validating your website before it goes online is the last step and we all want it to go as smoothly as possible. But before publishing your work, it is necessary to check that you have not forgotten anything. This article has been designed as a checklist to start with confidence.

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By Olivier Paudex

Introduction

Your website has been in development for weeks, even months. You have been working on it for many weeks and it is now the time to release it to the public. But have you thought about everything? It's hard to be really sure. Are you sure it will work the way you want it to? Aren't there any page links that don't lead to anywhere, what in computer terms is called the 404 error. All these questions can be factors of doubt and put you in an uncomfortable situation. But there is a list of recommendations that, if you follow it, can save you precious time by correcting all these points before launching. Since this site is all about Elementor, all choices are in relation to the page builder. From simple WordPress configuration to setting up a backup plan in case of a crash, follow the guide.

Choose a theme

The first task that any web site administrator needs to do is to install a theme. This may be a daunting task, given the large choice of themes offered by WordPress. Most themes are created for a specific category of publications. It is the theme that will allow you to display the **widgets**, that is to say the different blocks of elements that will make up your website. With Elementor, we assume that we do not use this possibility to create widgets, because Elementor is a page builder by itself and does not rely on widgets. But because the choice and installation of a theme is mandatory in WordPress, Elementor has created its own theme whose purpose is to create blank pages. Its name is just as simple as its function, it has been named **Hello**.

Set a child theme

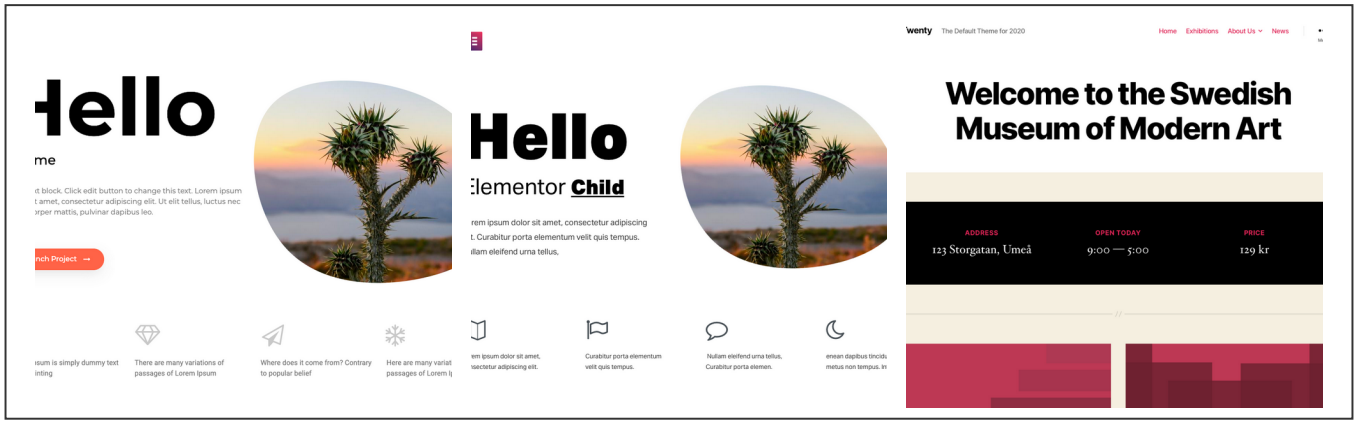
I won't expand in this publication on the child theme, but be aware that it will give your website the ability to customize your functions. These functions are written in a language called **PHP**. It is also used for the global customization of the site by allowing you to use style sheets or **CSS (Custom Style Sheets)**. It is recommended to install a child theme. For Elementor, the Hello child theme can be found in the WordPress library. Download and install it.

Set an emergency theme

Even if the latter has no useful function under normal circumstances, WordPress recommends installing a backup theme. Some will tell me that it is useless and they will certainly be right. Nevertheless, since it is a recommendation from WordPress, install a backup theme of your choice.

Purge all other demo themes

To keep the environment as simple as possible, remove from the list all other themes that WordPress has installed.



The 3 themes to be installed in 2020 to use Elementor

Clean up WordPress

Delete articles, pages and comments

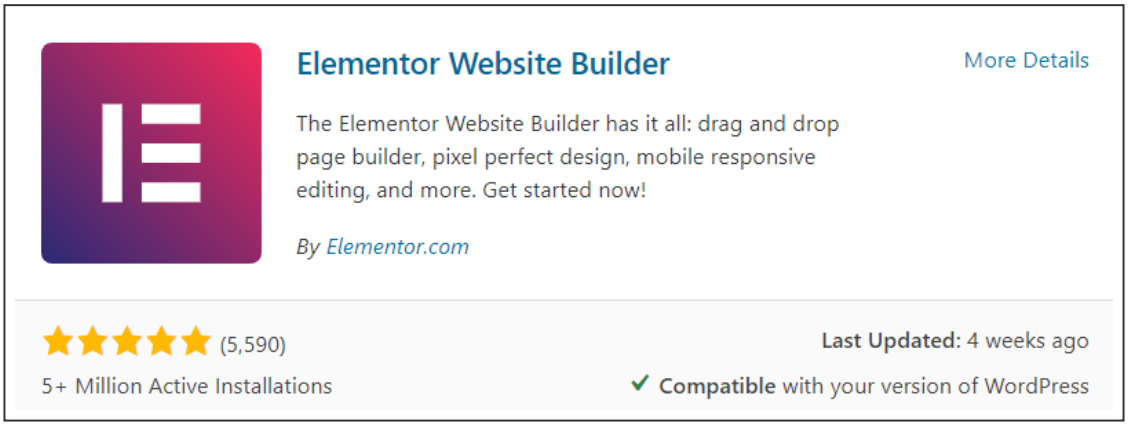
WordPress is installed with articles, demo pages and dummy comments. You can remove them without hesitation.

Plugins cleaning

The second main task will be to remove everything that is not necessary for your website. Start by going to the plugins section (**Extensions > Installed Extensions**) and remove all the extensions you don't need.

With Elementor, the recommended minimum number of plugins is 3.

- Elementor
- Elementor Pro
- A cache plugin



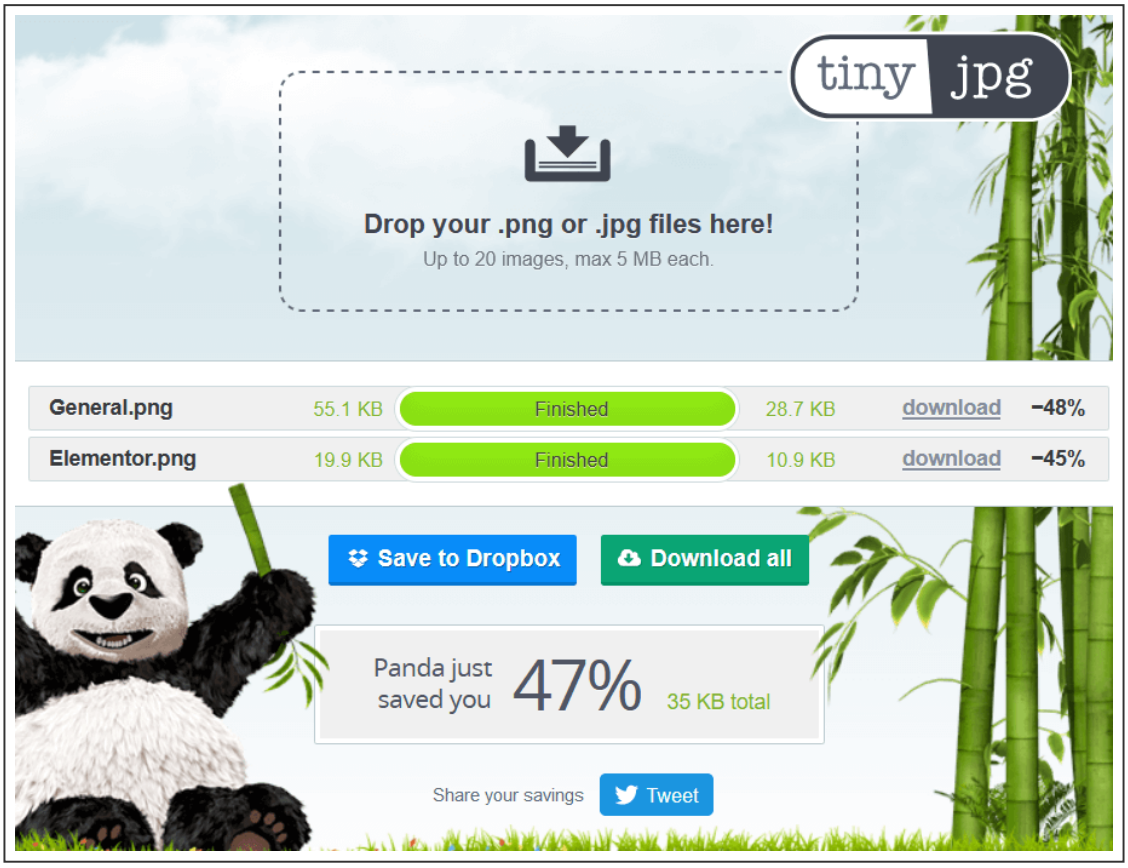
The Elementor's plugin

Elementor Pro is a paid extension, but its price is derisory compared to the possibilities it offers. It is almost indispensable, from the moment you decide to create a contact page with a form. As for the cache plugin, it is not mandatory, but highly recommended to speed up the loading of your various pages.

Cleaning and media compression

The media library contains all the images, videos, sounds and other files you use to create your website. In a new installation, you can delete everything without hesitation. Before launching your website online, make sure that the images are compressed and not unused. It is useless to keep extra images.

WordPress will automatically create several image sizes, which will avoid keeping huge images and thus unnecessarily slow down your website. To optimize your site, it is recommended to compress your images using an online tool or compressor such as **tinyjpg**.



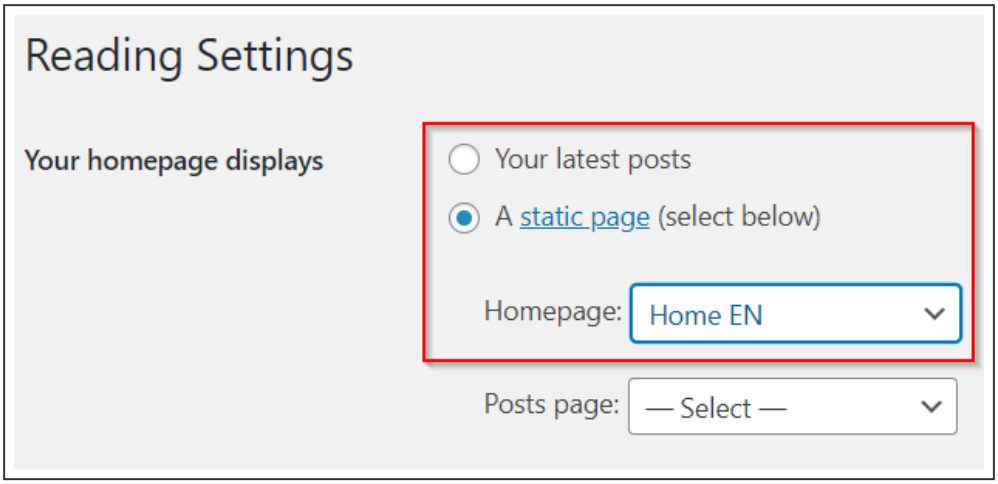
The TinyJPG Image Compressor

Create a homepage

WordPress was designed as a CMS (Content Management System) for blogs, also called in english a platform for digitizing content. It has been quite criticized, in those early days, for its lack of possibilities to create a real website, with a main page, a presentation page, a contact page, etc...

Today, WordPress has added this feature by opening up to most publications, whether it is a simple showcase site, a blog, a site, an online store, an archive site. Yes, with WordPress, you can really imagine everything and create a website that meets all needs.

To assign a start page, go to **Settings > Reading**, then choose a page as static. Make sure you have one.



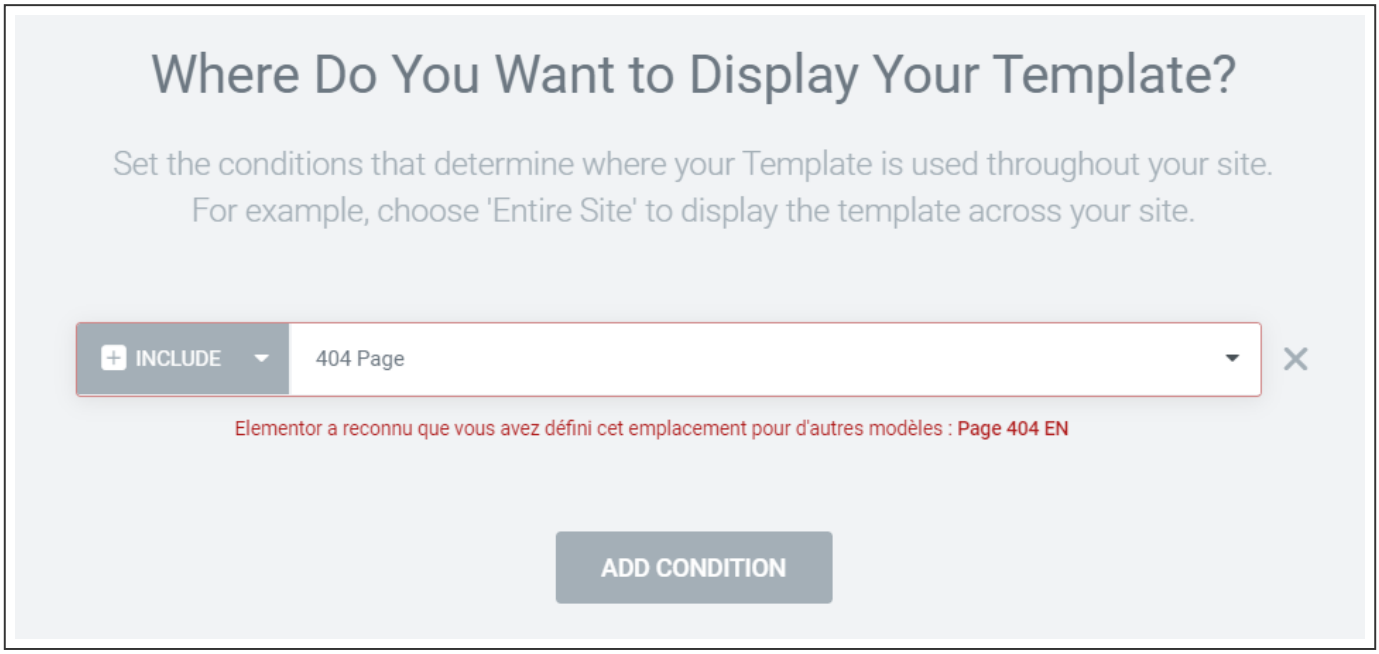
Create a static page

Create additional pages

Of course, your website will not have only one page. These depend a lot on the content of your site, but each site should at least contain a contact page, a maintenance page, a 404 error page. I will come back later on the creation of a structure and a tree structure of your different pages. With Elementor, you can create templates, which saves an incalculable amount of time from the moment you reuse a page or page structure over and over again.

Create the 404 page

To create a 404 page, go to **Templates > Theme Builder**. Click **Add**, create your page and when saving, configure the display conditions as below.



The display conditions on page 404

Create the maintenance page

To create a maintenance page, go to **Templates > Registered Templates**. Click **Add** and create your page.

To activate your maintenance page, go to **Elementor > Tools > Maintenance Mode**, activate maintenance mode and select your template. You can easily see that the site is in maintenance mode with the **red banner**.



The maintenance page only appears if you are not the site administrator or if you are not logged in to WordPress. Don't forget to disable it when you are done maintaining your site.

Create the privacy policy page

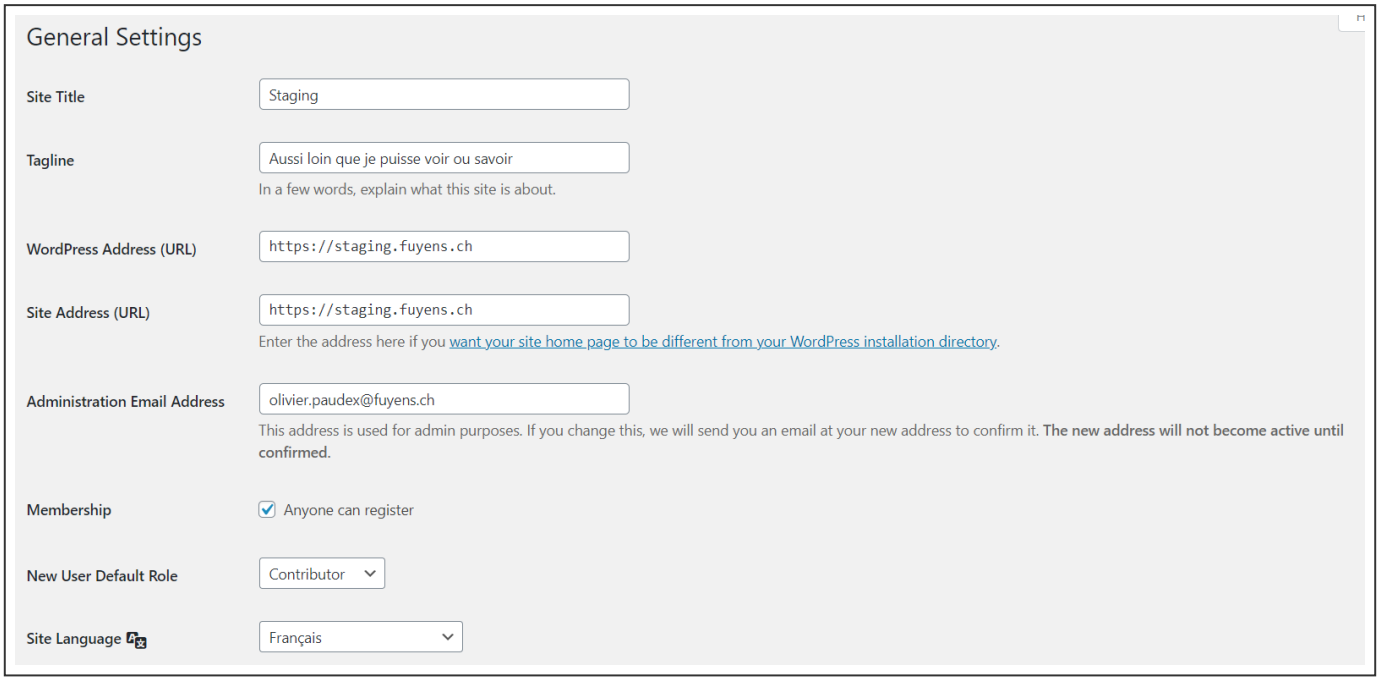
WordPress gives an example of pages in **Settings > Privacy**. We can largely draw inspiration from it

The settings

General settings

Start by going to the basic settings (**Settings > General**) and check that you have

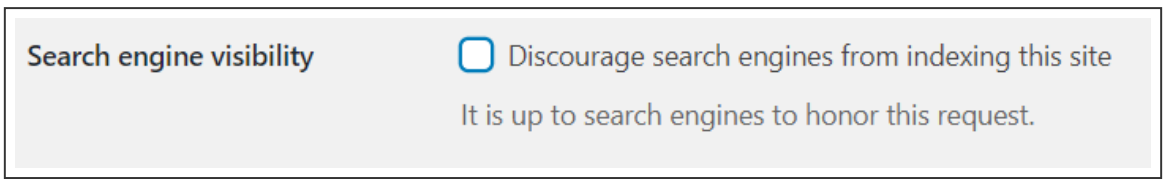
- A site title
- A slogan
- The base URL of your site. If you are not yet using the secure HTTPS protocol, it is time to ask your access provider about the possibilities available to you.
- The main language of your site
- The time zone corresponding to your site (if it is international, set the local time zone)
- An email address for the administrator. This should always be the same domain name as the site itself, especially if you manage several websites. Also make sure that the administrator registered under **Users** matches the email noted in the settings.
- Check the box **Registration > Everyone can register**, only if you create a login interface. Otherwise, uncheck this option
- Set a default role for the user according to your needs, but never leave the default administrator role.



The general settings

Indexing of the website

Don't forget to uncheck the box in **Settings > Reading**, concerning the visibility of the site. Otherwise, search engines will not be able to index it.



The indexing of the website by search engines

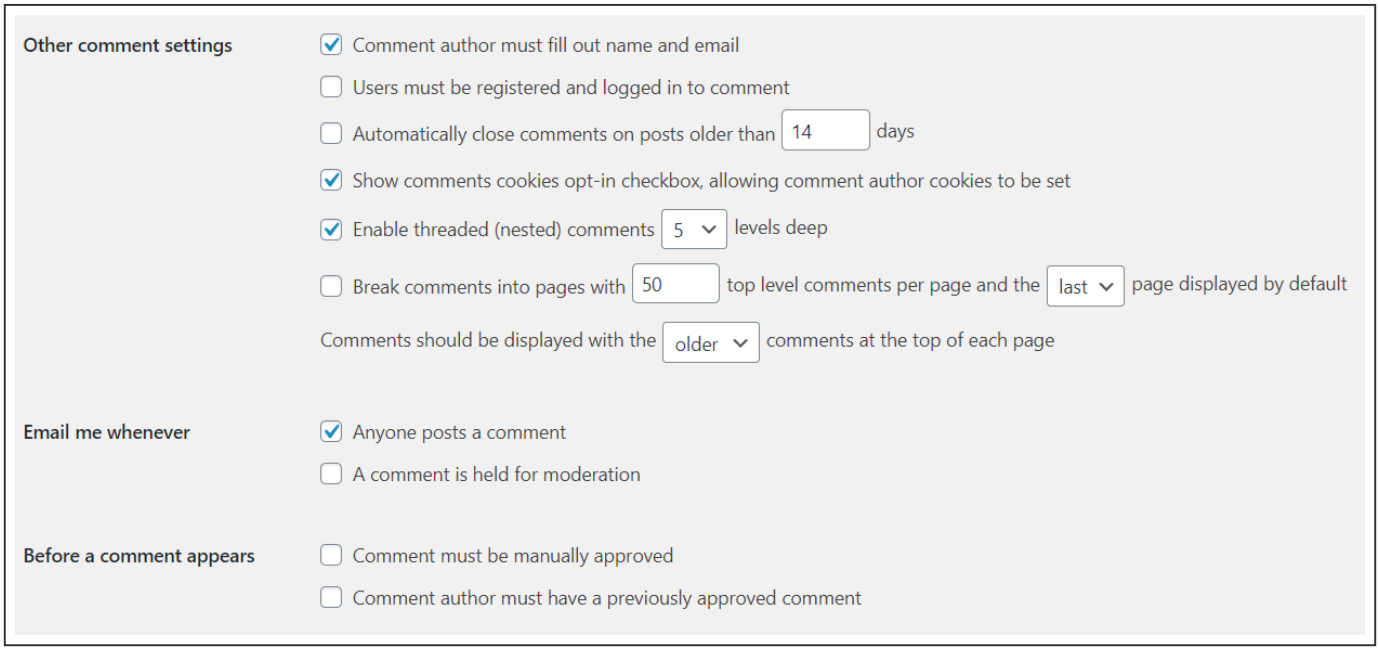
Allow comments

If you allow comments on your site, don't forget to check the 3 options below in**Settings > Comments**.



Allowing comments

The rest of the options are specific to each website. Nevertheless, I advise you the following



Recommended options for comments

Display the avatars

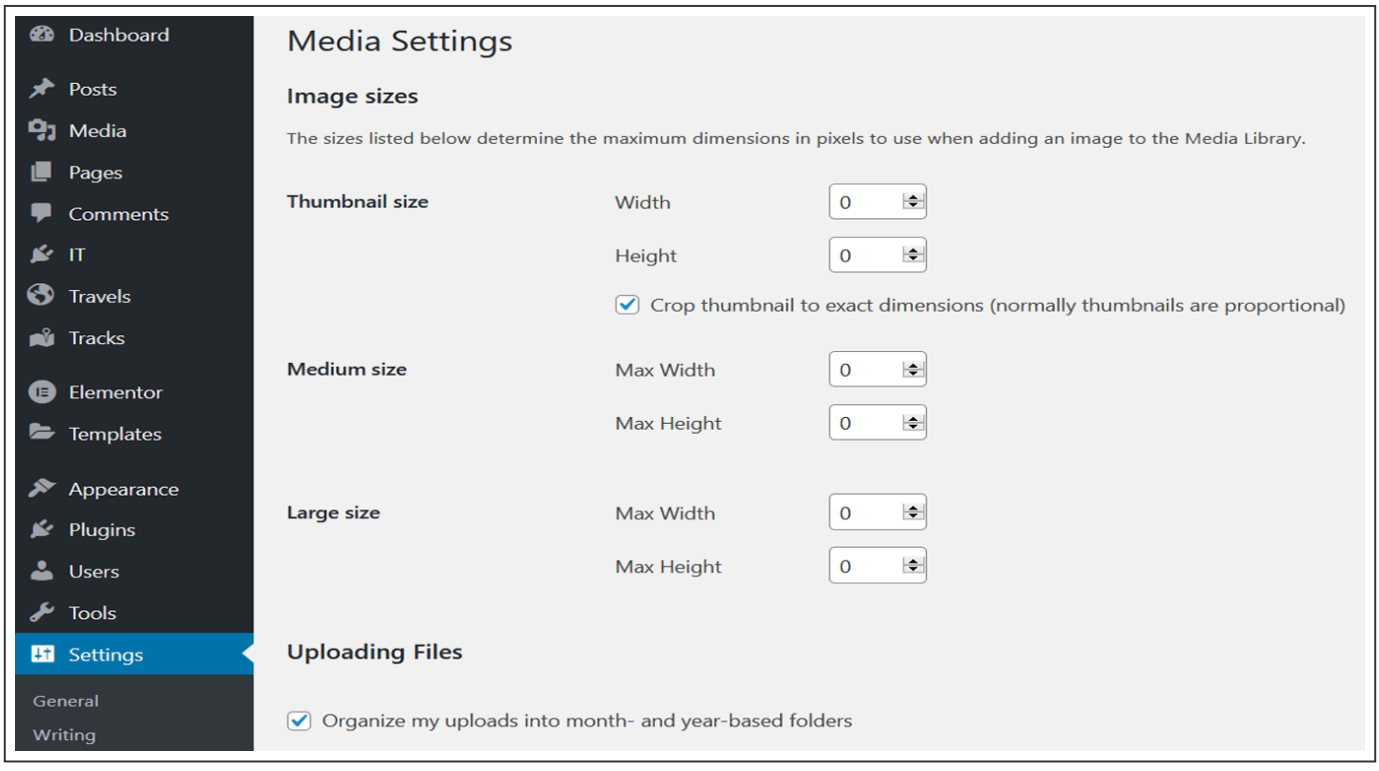
It is always nice to see the authors of publications and comments. Don't forget to check the box**Display avatars**.



Display the avatars

Media size settings

Let WordPress do it automatically and choose a setting without resizing. In**Settings > Media**, set all sizes to zero.



Setting the size of the images

Setting the permalinks

In **Settings > Permalinks**, display the title of the publication in the URL. This will give you URLs that mean something and search engines can be much more efficient than with an ID number that doesn't mean much.



The pretty name of permalinks

Website customization

In **Appearance > Customizer**, you have the possibility to adjust the appearance of your website. If you use the Elementor theme, the options will be very limited because Elementor provides its own settings in its interface. Nevertheless, you need to make sure that

- That your site has a logo
- That you have given a title to your site
- That you have specified a slogan to your site
- That you have specified a site icon

You can create an icon with a lot of free software available on the internet such as **favicon.io**.

- Check again to make sure you have a homepage

The Forms

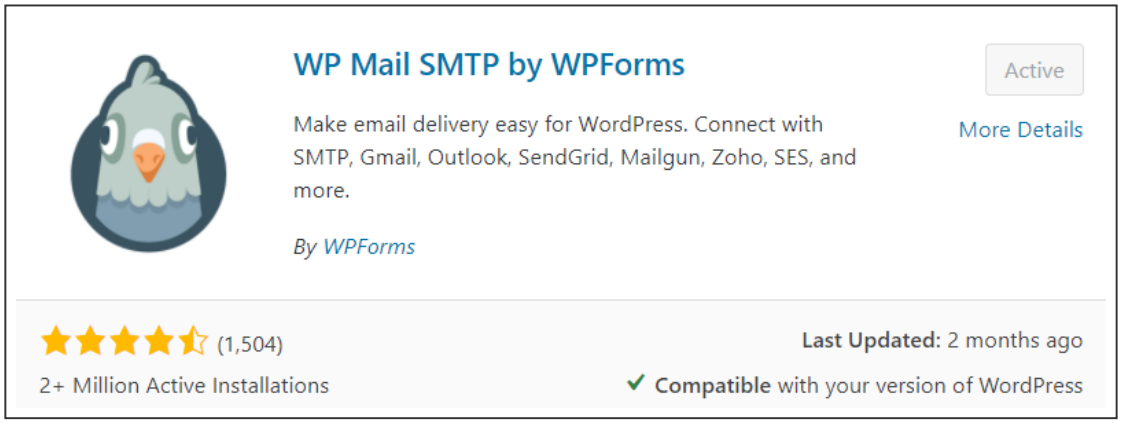
If you are using Elementor Pro, you will need to use the **Forms** widget. If not, you may create forms with another plugin such as WPForms. In any case, you need to test that your forms are working properly.

- Does it do the job it was created for ?
- Is there a confirmation (green) or error (red) message ?
- Does it send an email ?

In the case of forms, it is really necessary to get into all possible states and see if the behavior of the form is adequate.

If the form needs to send confirmation emails, it is more than necessary to create pseudo-profiles with real email addresses and see that these messages arrive at their destination.

The limit of hosting providers is often an obstacle to the implementation of forms that send confirmation messages. It is then a good idea to think about using mailing plugins like WP Mail. It is then possible to create an account with a mail provider totally independent from the web host. It is also advisable to install it to send massive mails for marketing campaigns.



The WP Mail plugin

The menus

Most websites have a menu for navigation. In WordPress, there are two elements that make up a menu, its structure and location. While the number of menu structures is infinite, the same is not true for its locations. They are limited depending on the theme. In the **Hello** theme, there is only one location available. If you want to create several menu structures, so to have several slots, you will have to add a few lines of code in PHP that I give you as an example. But I will come back to this subject later in another publication.

In the example below, I create two additional slots for the **Login and Logoff** menus.

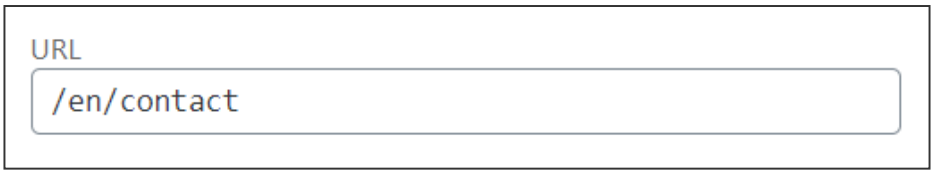
```
function register_menus() {
    register_nav_menus (
      array (
        'login'                 => ('Login'),
        'logoff'                => ('Logoff')
      )
    );
  }  add_action ('after_setup_theme', 'register_menus');
```

Use relative URLs links

This is an important notion in the creation of a website. It is recommended to use relative links. A relative link is nothing but an absolute link without its protocol and domain name.

- Example of absolute link : https://www.fuyens.ch/en/documents
- Example of a relative link : /en/documents

In menu configuration, relative links should be used whenever possible.



A relative link in a menu

The last word

There is no sense in publishing a website if it contains errors, missing or missing links, badly proportioned images, etc...

Put yourself in the shoes of a casual visitor and click randomly on pages, fill out forms and stop acting like a developer, just for a moment. You'll see that you can find many errors just by checking the sequence of pages.

So, test, then try again, once, twice, three times...

Good Luck.