

WordPress Maintenance

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ANDRAS GUSEO

Why

1. Bugfixes
2. Compatibility fixes
3. New features
4. Security issues
5. Cleaning up the mess

What do you need?

1. Staging site
2. Some plugins
3. A list of tasks before
4. (Do the update)
5. A list of tests
6. Create a report

1. Staging site

Always test updates on a staging site first!!!

Always have a backup of your live site!!!

- Backup Buddy - <https://ithemes.com/backupbuddy/>
- UpdraftPlus - <https://wordpress.org/plugins/updraftplus/>
- WP Staging - <https://wordpress.org/plugins/wp-staging/>
- Duplicator - <https://wordpress.org/plugins/duplicator/>
- All-in-One WP Migration - <https://wordpress.org/plugins/all-in-one-wp-migration/>

2. Some plugins

1. Backup and migration plugin
2. Disable Emails (for the staging site)
 - <https://wordpress.org/plugins/disable-emails/>
3. Maintenance mode (for the live site)
 - <https://wordpress.org/plugins/lj-maintenance-mode/>
4. Cleanup
 - WP-Sweep - <https://wordpress.org/plugins/wp-sweep/>
 - WP-Optimize - <https://wordpress.org/plugins/wp-optimize/>
 - Advanced Database Cleaner - <https://wordpress.org/plugins/advanced-database-cleaner/>

What to migrate

1. If the database is large, then migrating it in one go might not work. **Split it.**
2. Do you need all the database tables for testing? To speed up migration **leave out the superfluous tables** like email logs and error logs.
3. Do you need all the files? (Media Library)

3. A list of tasks before

What settings to change on the staging site
after migration / before testing

1. Change the color scheme for your user!!! A good way to distinguish between the live site and the staging site.
2. We don't want the site admin to receive emails.
Change the admin email address. Or better, use the Disable Emails plugin.
3. eCommerce site: set payment gateway to sandbox mode
4. Disable search engines.
5. Disable scheduled backups.
6. Disable security notification emails.

4. Update

1. WordPress

2. Theme

3. Plugins

- You can update plugins in more stages if you have a lot of them

4. Clean

- Unused plugins, themes, content
- Database

5. List of tests

What needs to be tested

1. Does the website still **look the same** after the update?
 - Check and compare 5-10 random pages
 - On multilingual site check pages in different languages
 - Check pages on mobile (and tablet); in different browsers
2. Does your **contact form** still send emails?
3. Do you have **special functionality** on your website? Does it still work?
 - FAQ search
 - Portfolio filtering
 - Advanced Custom Fields
4. **eCommerce**: Purchase process still works? Payment still works?

All good?

Update the **live site** and run the **tests** there as well!

(Don't forget to enable maintenance mode before.)

6. Create a report

1. What did you **update**?
2. What **didn't you update**, why, and do you have a recommendation?

"The XYZ plugin was not updated because the new version breaks the design. Fixing this needs further testing outside the maintenance contract."

3. Did you **remove** any unused plugins, database tables, etc.?
4. Did you encounter **any issues, glitches**? What is your recommendation? Or How did you fix them?

"On the Contact Us page two paragraphs of text were overlapping. It was fixed with the following CSS, which was added to the style.css file:"

5. Do you **recommend any changes** in the next maintenance round?
 - Remove / change / add any plugins?
 - Can something be done better on the site?

Three Rules

1. Backup. Regularly!
2. If you are in a heavy traffic period, don't touch anything!
3. Test changes on a staging site first!

THANK
YOU

ANDRASGUSEO.COM

AGUSEO@GMAIL.COM