Wirral Cycling Group

Website Maintenance and Support

Version 1.1: October 2025

Changes since v1.0 :

- Added a new page '**Instructions**' to show instruction manuals for committee members

- The contents of Section 6: Regular Site Administration Tasks have been moved to separate documents
    - Ride Coordinator's Manual,
    - Treasurer's Tasks on the Website
    - Actions Required when Committee Members Change

INTRODUCTION

This manual is provided for the people who need to maintain or alter the Wirral Cycling Group's website: www.wirralcycling.org.

Its purpose is to record, in detail, how the website is set up and, when necessary, explain why it is set up in that way.

The manual is divided into six sections:

- Section 1 describes the platform on which the site is hosted (Ionos)
- Section 2 introduces Wordpress; an open-source Content Management System that we (and the majority of sites on the internet) use as the base for our website.
- Section 3 goes into a lot of detail about the most complex part of the website; the ride booking system provided by the Events Made Easy plug-in
- And Section 4 shows how the site uses posts to display a table of established routes that the group has used in the past

These first four sections cover the way that the site was created and so (unless there is a need to change or add to the functionality of the system or unless the system fails for any reason) do not need regular maintenance or support.

But the final two sections describe the tasks that do need to be carried out regularly:

- The open-source software that we use to support the Website is constantly being improved and updated. Most of those updates happen automatically without any issues, but the website administrator needs to "keep an eye" on what is happening and occasionally may have to change a setting or update a feature manually. Also users often make mistakes when they enter information and ride leaders don't always follow the conventions for their ride details. So about once a month, the website administrator should check over the data and if necessary make changes. Section 5 describes how to check the status of the website and how to make changes to data. In an ideal world the person who makes these types of changes would have some IT knowledge and experience.
- But there are also a few regular administration tasks that don't need a lot of IT knowledge (for example, creating ride leaders, setting up the ride schedule, sending out reminders for membership payments, setting up access and emails for new committee members). Those tasks can be carried out by the Ride Lead Coordinator, the Treasurer, or the Secretary. The instructions on how to do those regular administration tasks are set out in Section 6.

Please Note:

It is very important that this manual is updated whenever a change to the set-up of the website is made or when any new features are added. Don't be tempted to leave the documentation for a day or two, because that day or two will become a month or two, and then you won't remember everything that you changed!

It is also very important that the manual is changed as soon as possible if a mistake or an omission in the manual is discovered. Or even if you find that the manual needs a bit more clarification or explanation. Clear and accurate documentation saves a lot of heartache in the future

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1. Hosting the Website

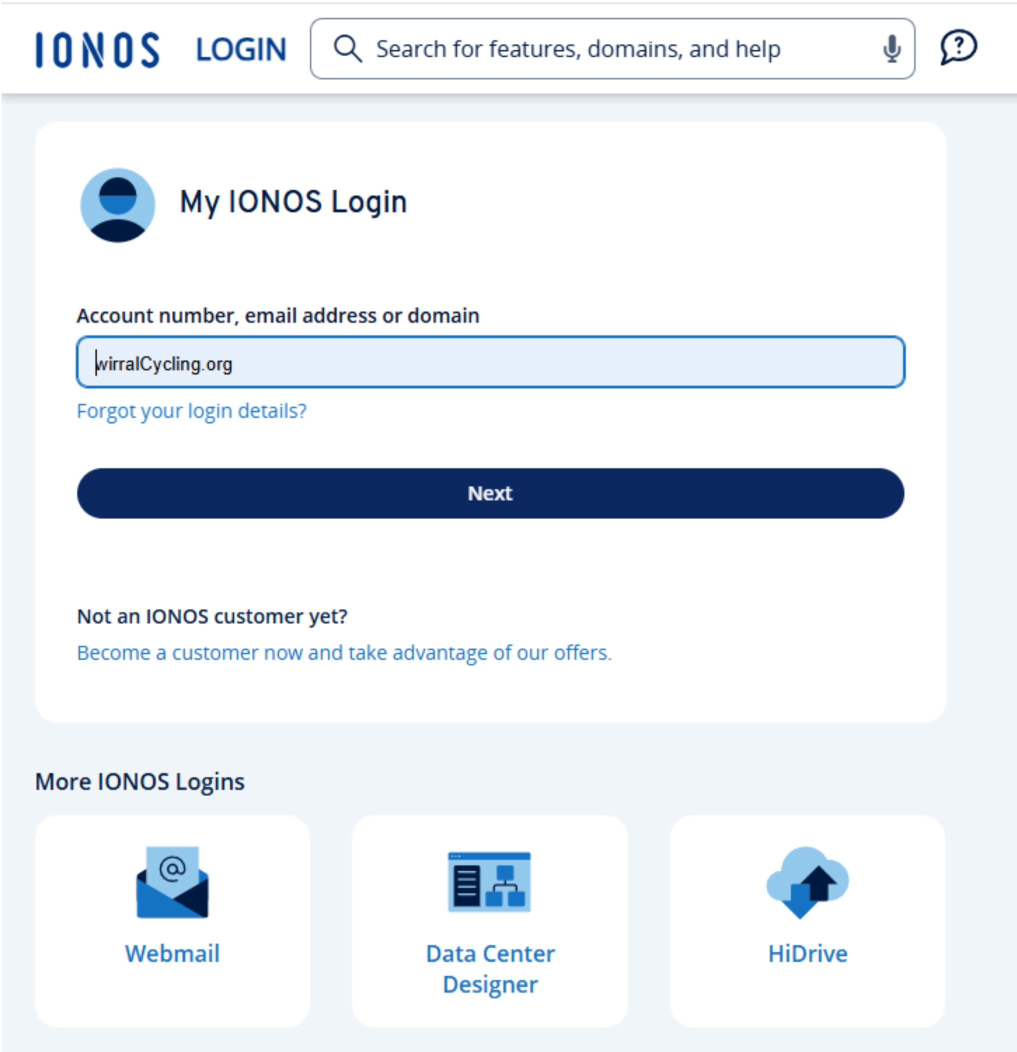
Every website needs a physical home: a computer system connected to the internet where the website resides. One could set up one's own website, with just a PC and an internet connection, but that approach needs a lot of supervision and a great deal of maintenance. So most people (including us) pay a Website hosting company to host the website on our behalf. We currently use Ionos.

Ionos provide three main services for us. They:

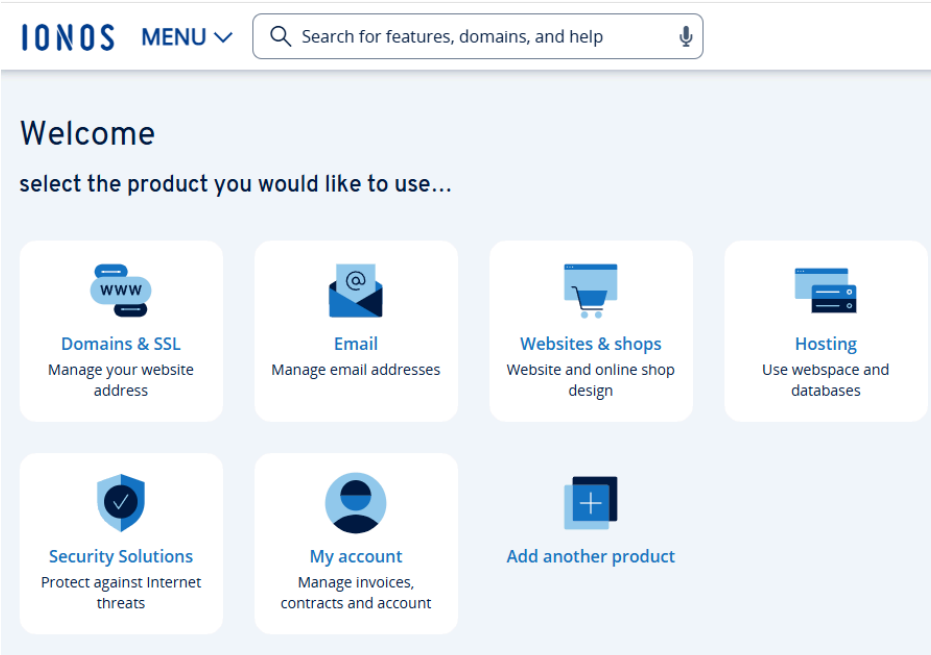
- Register and maintain our internet domain name www.wirralcycling.org
- Operate the servers on which the website runs and provide and maintain the software needed to host the website
- Offer an email management service so that our officials can use an email address with the club's domain name.

1.1 Log-in to Ionos

To log-in to the website hosting system, go to https://login.ionos.co.uk, enter our domain name "WirralCycling.org", press Next and enter the password.

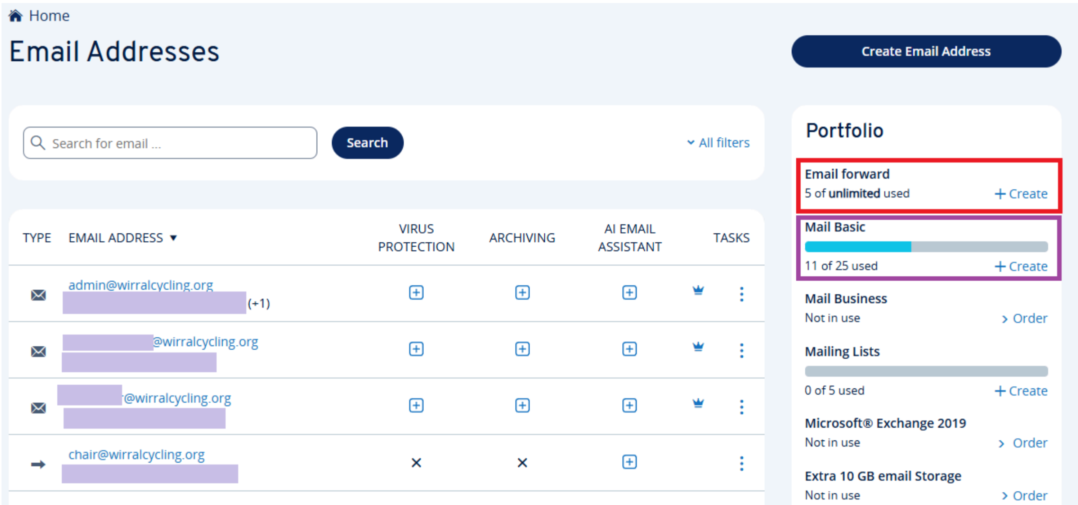


You will then see the Ionos menu (and usually some adverts for additional features):



The two areas that you are likely to use are Email and My account; everything else should be set up correctly and not need to be changed.

1.2 *Ionos Email*



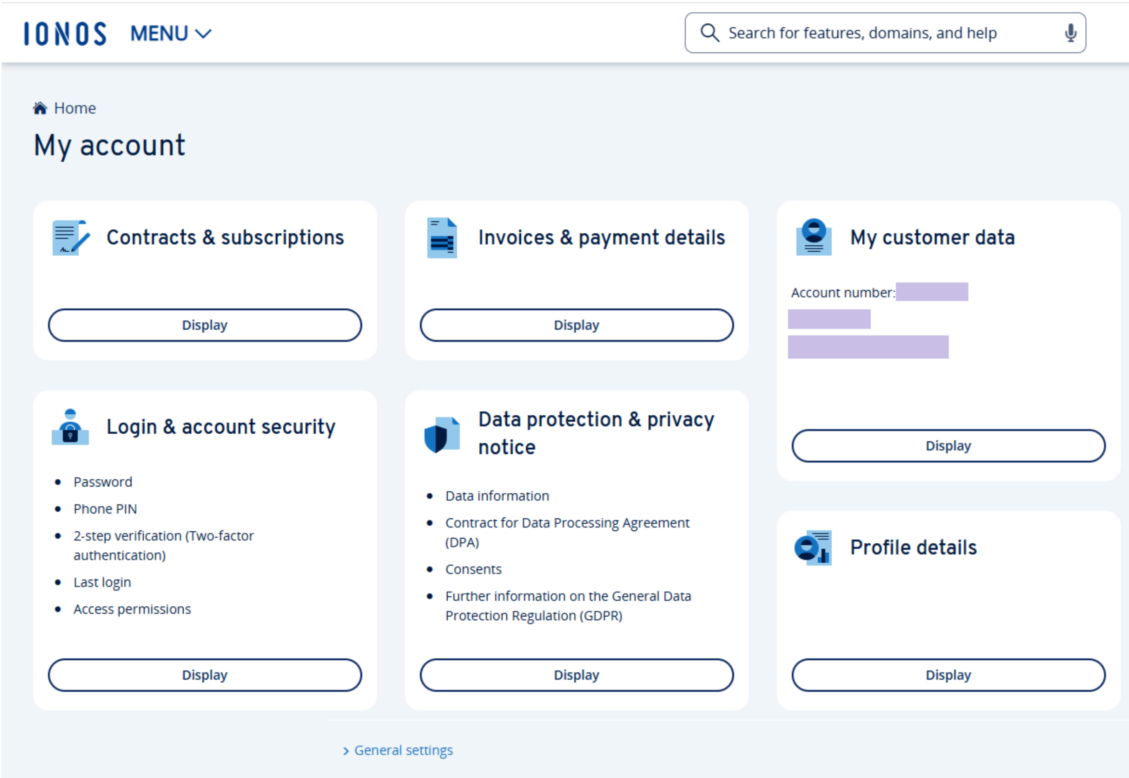
Ionos offers two types of email address: Email Forward (addresses with the arrow logo) & Mail Basic (those with the envelope logo).

We use Email Forward so we can publish email addresses for people to contact officers of the group. For example: chair@wirralcycling.org, secretary@wirralcycling.org, etc. When someone sends an email to one of those addresses, the Ionos server will just forward it to the personal email of the appropriate officer (or officers; it can be set to forward to one or more addresses). To add a new Email Forward address, press + Create (highlighted in the red box above).

We use Ionos Mail Basic to provide officers of the group with an email address in the form john.smith@wirralcycling.org that they can use to send out emails on behalf of the club without revealing their personal email addresses. Any replies will be kept on the Ionos email server and also forwarded to the recipient's personal email account. We set up an email Basic address for each member of the committee, and the administrator of the system (admin@wirralcycling.org).

1.3 Ionos Account

The Ionos Account page shows information about our account with Ionos.



Most of the information on the account is static and doesn't need to be changed. Invoices and payments for the Ionos service are listed here, but copies are also sent to the customer email address.

2. Wordpress

Wordpress is an open source (maintained by the community and free to use) Website Content Management System. About half the sites on the internet run using Wordpress. It provides the basic framework for creating and displaying web pages to users, plus all the additional facilities that are needed to run a website.

When maintaining a website with Wordpress there are a number of different concepts to understand. We have listed those concepts below, followed by a section on each concept to explain how they are used on our website in more detail.

1: Themes:

Websites need a consistent look and feel; the colours, the fonts, the position of menus, the content of headers and footers, the look of buttons, etc. To save the website builder having to set up all those things on every page, Wordpress allows the designer to choose a “Theme”. We chose Astra.

2: Media:

Wordpress has a Media Library where we load any pictures or documents that we want to display on the website. They can then be displayed on any page via a simple link pointing to the Media Library.

3: Users:

Most of the people who use our website will never see Wordpress itself. It remains “behind the scenes”, displaying pages and allowing people to enter limited information (such as their name and email when booking a place on a ride), but remaining invisible. But, there are some people who need to be able to get “into” Wordpress to maintain the site or create new records or pages. Those people need to be Wordpress Users; they are given a Wordpress User Id and a password, and that User Id is assigned a set of access rights. For example, the website administrator needs, and has, access to all parts of the website, but ride leaders are only given enough access rights to create and amend their own rides.

4: Pages & Posts:

Wordpress websites are built around Pages and Posts. When you open our website you see the Home Page, and on it are links to other pages either via the menu, or buttons, or highlighted links. Pressing one of those displays another of the website pages. However, designing a page from scratch is really difficult. One has to control exactly how things will be displayed, position, fonts, colours, line spacing; and that design has to work on different devices and sizes of screens (PCs, Tablets, Phones, etc). So we use a plug-in called Elementor that makes creating pages much simpler. We don’t need a facility for people to post things onto our website, so we don’t use Posts in the normal way (when we need to get information from people we use predefined forms). But we do use Posts as a place to hold data to display on some pages such as Routes.

5: Plug-Ins:

So what is a plug-in? One of the great features of Wordpress is the number and variety of Plug-ins. Plug-ins are software that carry out a specific function and can simply be added to (plugged-in) to Wordpress. We use a range of plug-ins, some to provide features on our website and some to help us maintain the website behind the scenes.

2.1 Themes

Astra is the only Theme that we use on the site. It sets things like the Site Id, the position, size and colour of headers, footers, titles, buttons, HTML links, and the typeface and sizes of the different headings and text. Unless someone wants to change the look and feel of the site, then there is no need to amend anything in Astra. If you do want to change anything, click on the Dashboard menu "Astra" and see the options (including a Quick Start Guide).

We also keep a backup standard theme (provided by Wordpress) on the system just in case we need a spare Theme in a hurry; it is named after the year it was first published (e.g. Twenty Twenty-Five). Wordpress publishes a new one every year.

2.2 Media

The Media Library is just a place to hold images, videos or documents that need to be displayed on the website.

Adding a file to the Media Library is straightforward. Get the files you want onto your hard drive (I use my Downloads folder). Then select Media Library from the menu and press the button (top left) marked "Add New Media File". Press the Select button to choose/find the file(s) that you want to add to the Library pressing the button marked Select. When you Open those files they will appear in the Media Library.

To display a file from the Media Library on a website page, click on the media file and it will display information about that file. Halfway down on the right is the URL (the address of that file which the page will use). Just below it is a button marked "Copy URL to Clipboard". Click on that button and the URL will be copied to the clipboard. Then go to the page where you want to display the media file, find the place to insert the URL and paste. As soon as you update that page, it will display the media file.

To delete a file from the Media Library click on it and there is a link at the bottom right in red ink marked Delete Permanently. Only delete the file if you are sure it isn't used anywhere on the site.

2.3 *Users*

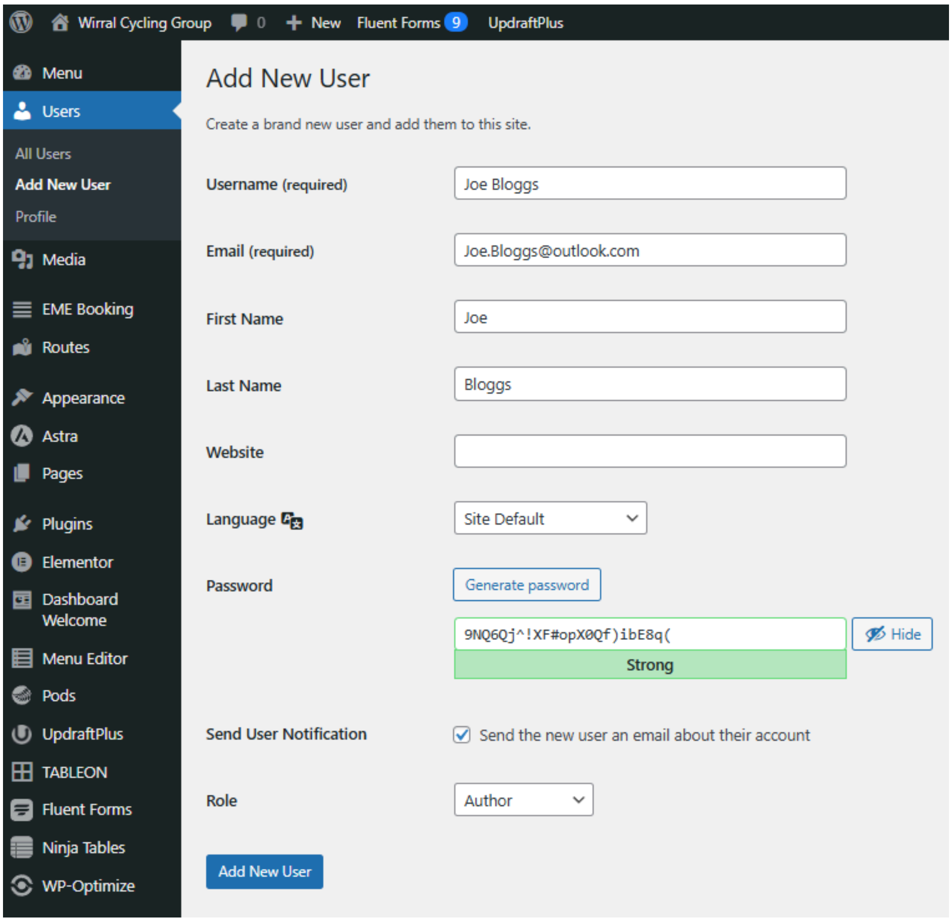
Wordpress has a range of different User Roles, with different access rights. We use three:

Administrator: Every website has an Administrator. They have all permissions, access to all capabilities, control over the entire site, and get to assign WordPress Role permissions to other Users. There is currently one Administrator (WCGAdmin) and any messages for the Administrator are routed to the committee member(s) assigned to manage the website.

Editor: Editors are responsible for publications on the site and can create, change, publish, or delete any posts and pages. We use the editor role for the committee members who are allowed to update the content of the website, but who are not allowed to update the system.

Author: Unlike the two previous WordPress User roles, an Author can only affect their own content. They cannot change or delete documents created by other users. We assign Author status to Ride Leaders, so they can add, change or delete information about the rides to which they have been assigned.

To add a new user go to the Menu item "Users" and click on Add a New User.



Enter their

first and surname as the Username

an email address

their first name

and surname

Change the password to something more memorable (the default is way over the top)

Set their Role to Author (for ride leaders) or Editor (for a committee member who needs access)

And then press the Blue button to add the new user.

Note: There are two 'unusual' User names on the list. One is "WCGAdmin", for the administrator of the website, and the other is "-Unallocated-" which is a name which can be assigned to rides that don't yet have or have lost their ride leader; the name will display as "Leader Required" on the website. These two unusual names are prevented from displaying on the website by code in the EME templates (See section 3.6).

2.4 Pages

Web sites are made up of a series of connected web pages, and there is always a Home Page, the page where users arrive on the site.

All the pages we use can be seen by pressing “Pages” on the Dashboard.menu. The pages that we have built are:

- **Home:** Our Home Page has a brief introduction to the club followed by three sections about Taking Part, Upcoming Rides and Joining the Club. There are a number of buttons and links to other pages on the site and to our Facebook page, with menus to other pages on the site at the top and bottom.

- **Participation:** (Taking Part) is a page that gives information on how to join rides

- **Planned Rides:** displays all the future rides that Ride Leaders have posted to date

- **Membership:** (Join Us) has information about joining the club, plus a lot of links to other sites that are useful for riding on the Wirral.

- **Routes:** displays over 200 routes that the group has ridden in the past. We think 200+ is enough for any small peninsular and don’t plan to add more.

- **Contact:** (Contact Us) displays a Contact Form to allow anyone to send us a message. When a form is submitted it will be forwarded to the Secretary .

- **Registration:** displays a Membership Request form, which is sent to the Membership Secretary when it is submitted.

- **Incident:** displays an incident report form (for the use of ride leaders) which is sent to the committee member responsible for ride safety when completed.

- **Documents:** (Library) is a page with links to the group’s formal documents (most of which are stored as entries in the Media Library). It also links to two other pages whose access is restricted (using the EME Access Check, which can be set by choosing the “Edit Page” option, not the “Edit with Elementor” option).

    - **Members:** displays names, addresses and email addresses for different types of members. This page is only available to the System Administrator, Committee Members and Ride Leaders

    - **Committee:** (forms submitted for committee members) displays three tables showing submissions via the Contact Form, Membership Request and Incident Report form. It can only be seen by the System Administrator and Committee Members.

    - **Instructions:** has links to all the instruction manuals held on the website which are intended for use by the different committee members

- **Rota:** is a page designed for, but not restricted to Ride Leaders. It shows the unfilled dates on the rota assigned to each ride leader, so they know when they are due to lead. And when they log-in it shows details of their rides and future bookings. It also has links to a lot of documents useful for ride leaders that are stored in the Media Library

- **Events:** is a page used by the Events Made Easy (EME) Plug-in. We don’t need to and <u>must not</u> change it !

2.5 Plug-ins

[Elementor]
Elementor is a very powerful plug-in with many different functions, but we use it to create and maintain our pages. Wordpress has a page editor, but it is not user friendly. Elementor displays a mock up of the page that you are building and gives you tools to easily add features such as headings, columns, images, buttons, etc. When creating or updating a page you will get two options: 'Edit Page' or 'Edit with Elementor'. Use 'Edit with Elementor'.

Dashboard Welcome
Displays a page (built using Elementor) on the right-hand side of the dashboard screen. We use this to display advice and some videos (via the Wordpress template "Video Advice") on the website to help ride leaders understand how to post rides and get access to information.

Admin Menu Editor
This Plug-in allows us to change the wording and the sequence of the Wordpress menu on the left-hand side of the Wordpress Dashboard to match the needs of different users. We also use this to hide menu options from users that they cannot, or should not, use.

Pods
Pods display lists of multiple records on a page. For example the list of Upcoming Rides on the Home Page uses the "Pod" [eme_events scope=+31d notcategory=1] to display all the events (rides) with a date in the next 31 days that are not in Category 1 (not 'Rota Only').

TableOn
Is a plug-in that displays Wordpress posts in a tabular form. We have used Wordpress posts to create and store a set of Established Routes. TableOn lets us show those Posts/Routes in the form of a table which can then be sorted or filtered by anyone using the website.

Fluent Forms (Shown on the Dashboard menu as "Submitted Forms")
We use Fluent Forms to design forms for people to enter information: so far we have created a Contact Form, an Incident report and a Membership Request. When somebody submits the form it is delivered to one of the committee members' email addresses. This will have to be changed as and when committee members leave or change roles.

Ninja Tables
Although a copy of any submitted form is sent by email to the appropriate committee member, the contents of the submitted forms are also displayed on the Committee Papers page with this Plug-in (it is one of the few that can display data from Fluent Forms in a table).

Events Made Easy
This is the big one! The ride booking system. And so has a chapter all of its own.

UpdraftPlus: Backup / Restore
Runs automatically once per month and sends copies of the website data (contents and code) to Google Drive (or any other shared space that the administrator specifies).

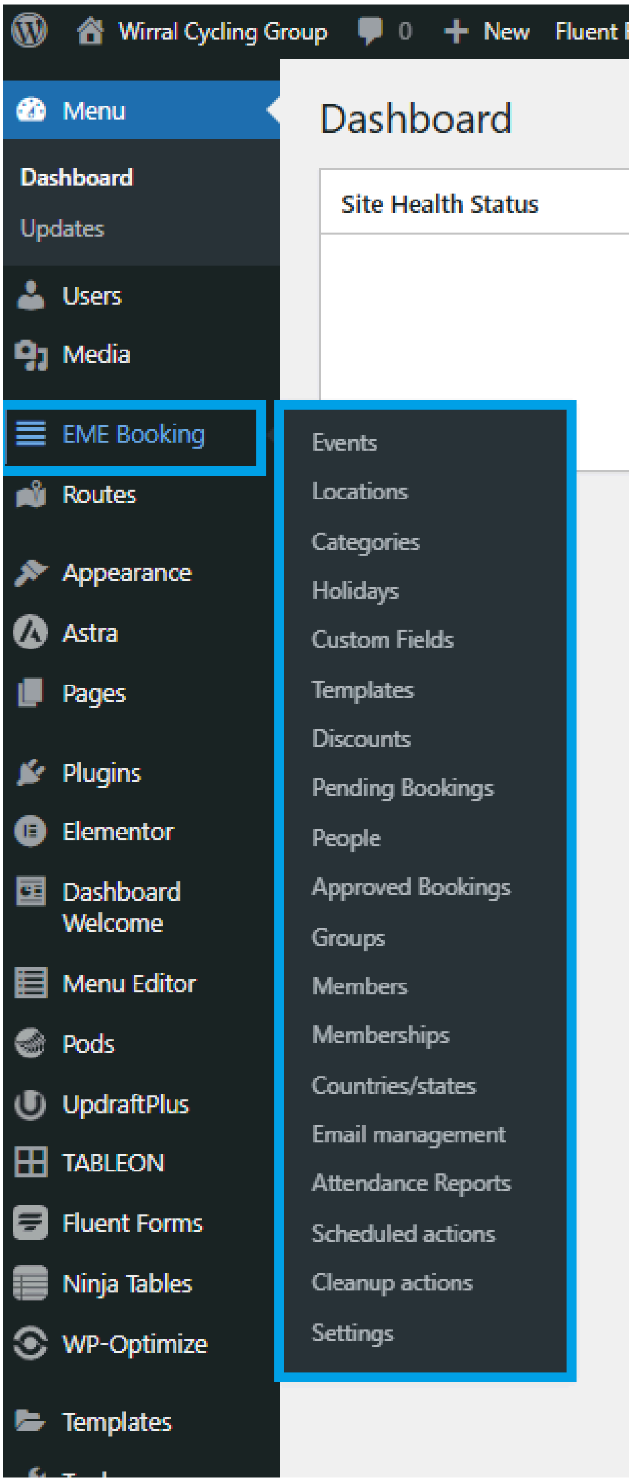
WP-Optimize
Is a set of utilities that are sometimes useful if there is a technical issue on the website that has to be resolved. You really need to know what you are doing before running any of this plug-in's options! In particular, do not use this plug-in's (or any other) page caching system. Page caching tries to speed up access by using a copy of the page retrieved last time (without waiting to find and load the latest version). But Events Made Easy checks the event page to make sure the booking is legitimate. If it finds an old (cached) version of the page, it will reject the booking with the message that the Form has been tampered with.

Click on the title of any of the Plug-ins above to go to their website

3. Events Made Easy *(entitled "EME Booking" on the Wordpress menu)*

Events Made Easy is a fully functional event booking system that has lots of functionality, most of which we don't need or want. It is designed to handle all aspects of running a series of large events. As well as a booking system, it can be used to send invites to potential customers, collect payments, distribute tickets electronically, record attendance, etc. But we only use the plug-in's booking system (to allow people to book onto rides) and its membership directory (to record our members' details).

When you click on the EME Booking menu you will see all of EME's functionality.



Events are our rides

Locations are the starting points for rides

We use **Categories** to control when to show the details of a ride in planned rides

We don't use **Holidays**

Custom Fields are there to allow us to keep data that isn't built into the Plug-in; for example Emergency Contact Details

Templates allow us to store text that we will use in different places. We use them for common bits of HTML code and for the text shown in the headings on rides.

Because we don't accept payments we don't use **Discounts**.

Pending Bookings are bookings on the waiting list

People shows a list of anyone who has used the booking form to book onto one of our rides (even if they didn't show up)

Approved Bookings lists each booking

Members shows a list of everyone who has paid a membership fee.

Memberships allows us to use different membership types; but we only use one.

We don't use **Countries/states**

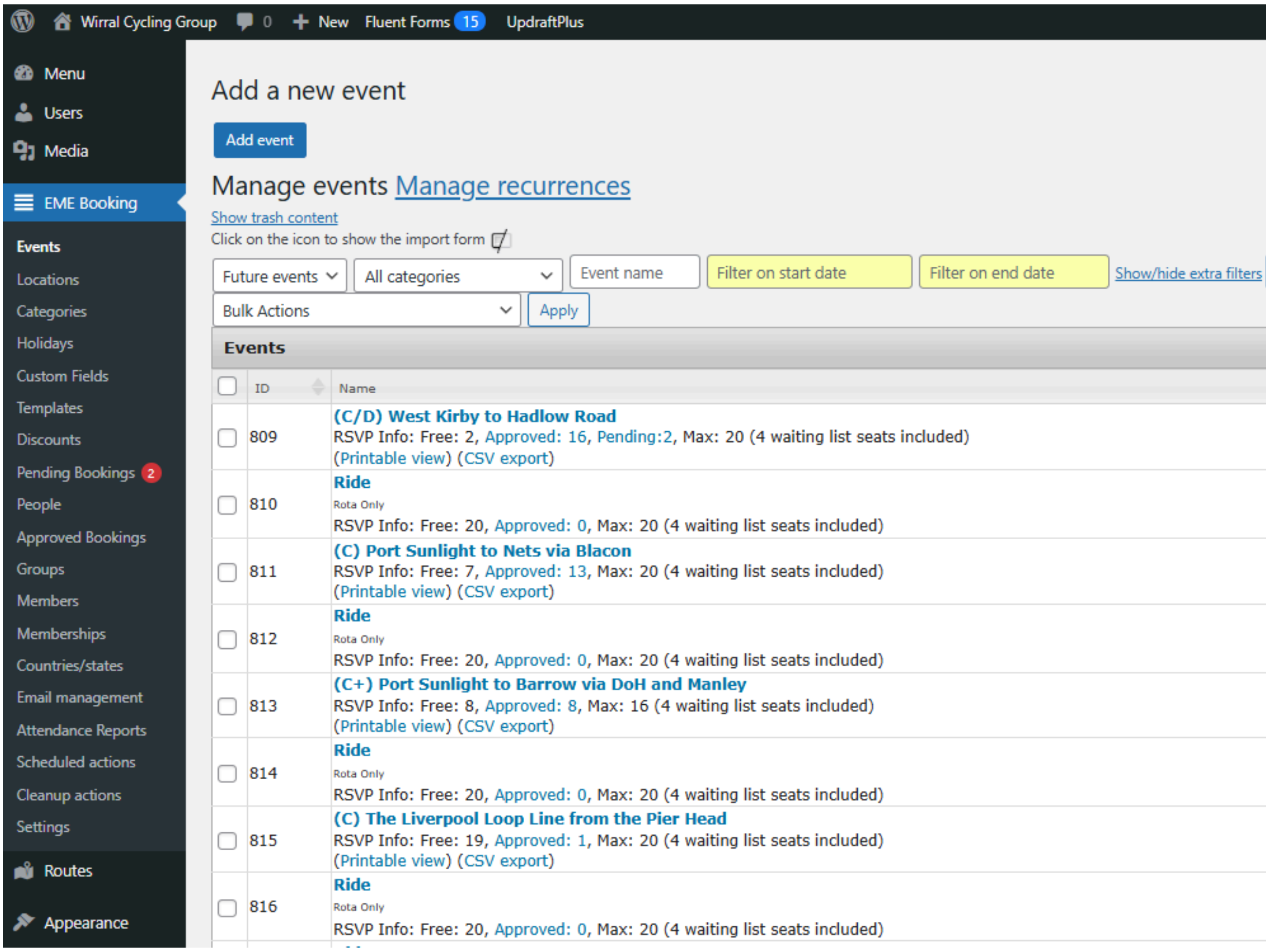
Email Management allows us to see and check any emails that EME has sent out automatically.

We don't use **Attendance Reports, Scheduled Actions** or **Cleanup Actions**

Settings is how the EME system is configured. Once set up, it rarely needs to be changed.

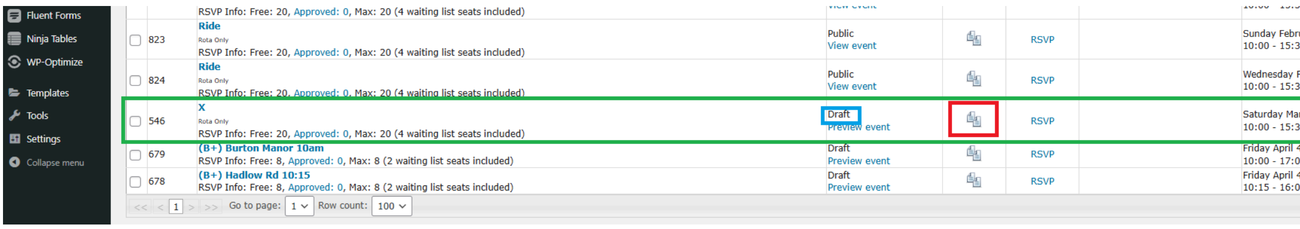
3.1 *Events*

Our rides are Events. When you click on “Events” you will see a list of future events:



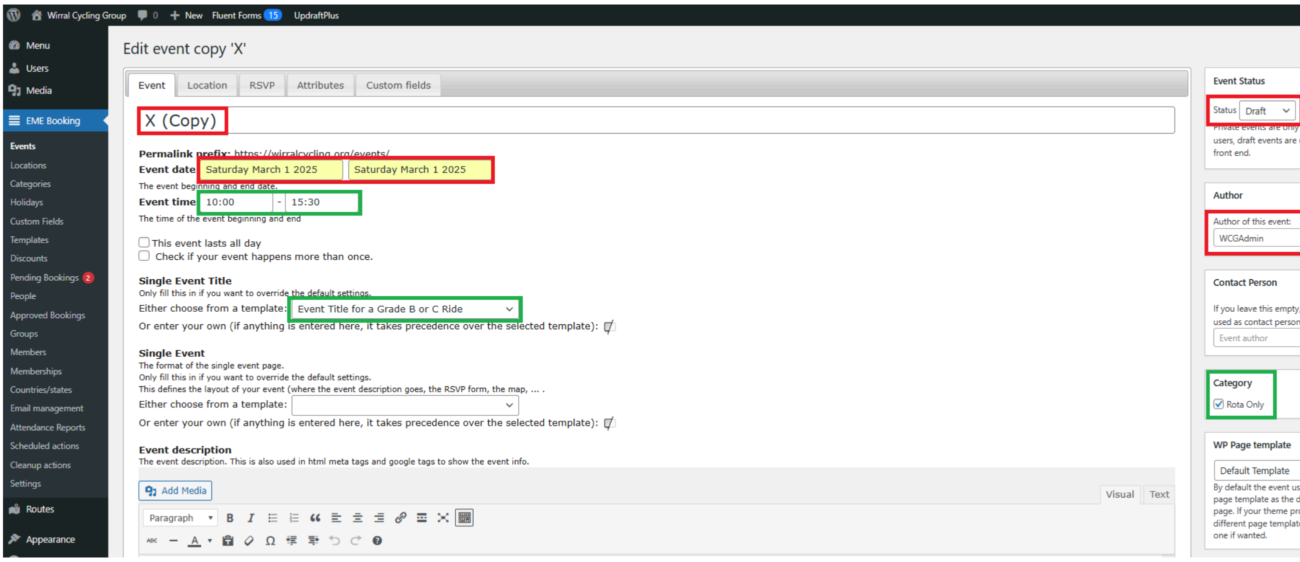
The Ride Coordinator periodically creates records on the website for all future rides and assigns each record to a ride leader (that action creates the Ride Leader Rota). Later, when the ride leader knows where they plan to go on that date, they add details of their ride to the record and release that record so that people can book on to the ride.

To make sure that any new record created by the ride coordinator has all the necessary fields set correctly the ride coordinator creates each new record by making a copy of a standard record. This standard record is normally kept near the end of the Events list (moved there by changing the date on the record) has the title X (to indicate it is not a real ride), and has its status set to Draft (so it’s not shown on the website).



To create a new ride record, the ride coordinator just makes a copy of the standard record by clicking on the Copy Icon (shown above in red). When creating multiple new records, it is best to make copies of the standard record by right-clicking on the Icon and then Opening the Link in a New Tab; that way the List of Events stays in place to make the next copy.

Once they have created the copy, the ride coordinator should change the title of the copy from ‘X (Copy)’ to ‘Ride’, set the Status to ‘Public’, change the date to the one for which the ride is scheduled (NB Each event has a start and an end date, which for our rides should be the same) and they should then choose the Ride Leader’s name from the drop down list in the “Author” field (typing some letters in their name will reduce the size of the drop down list).



The ride coordinator should also check that the defaults on the record (shown above in Green boxes) are correct; the start and end time default is 10:00 to 15:30, the Single Event Title is set for B or C rides (the ride leader can change this later for their ride) and the “Rota Only” Flag in the category box is ticked (to stop the ride details being shown on the website until the ride leader has completed them).

Note that the Event Description will have some text within it (which was copied from the standard record) to explain to the ride leader what information they need to put in this box when they set up their ride.

The Ride Coordinator ‘Publishes’ the new record when they press the blue “Save” button at the bottom of the page. An entry will then appear on the Rota page of the website allowing the ride leader to add the details of their ride. The Ride Coordinator can then go on to set up the next new record using the same process.

New records should be created in batches of a month, a quarter or similar, so that the Ride Coordinator can send an email to all the ride leaders announcing the new dates that have been added to the rota; something along the lines of:

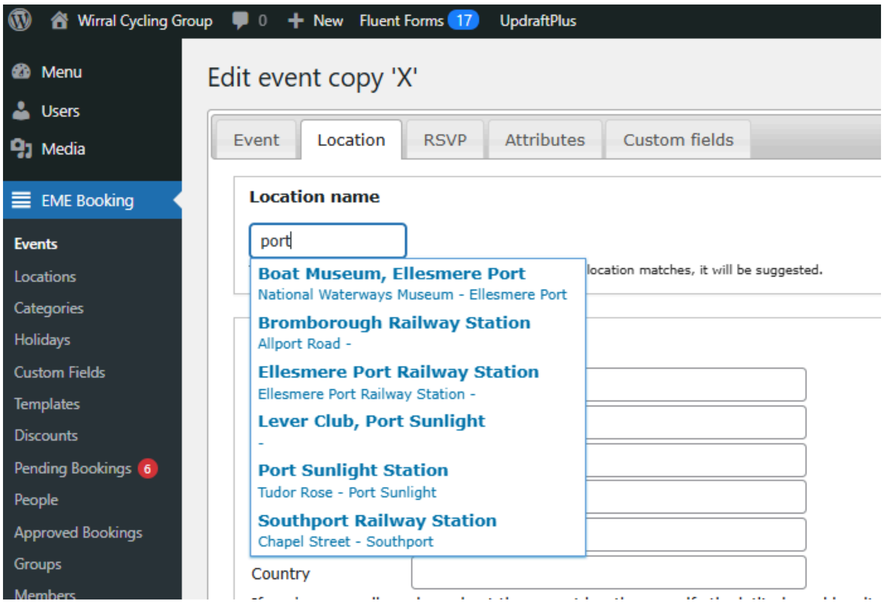
> *As usual I have just allocated ride leaders to dates in the order they are on my list (unless you have told me about your planned holidays or absences).*
>
> *Here is the rota that I have created: https://wirralcycling.org/rota/ for the three months to ‘dd/mm/yy’. If you can't, or don't want to, lead a ride on a particular day, please let me know and I will change the rota accordingly.*

The email addresses of all current ride leaders are shown when you are logged-in to the website at the bottom of the ‘Current Ride Leaders’ tab under ‘Membership Records’ on the ‘Library’ page. You can copy and paste those addresses for there into the To: section of your email app.

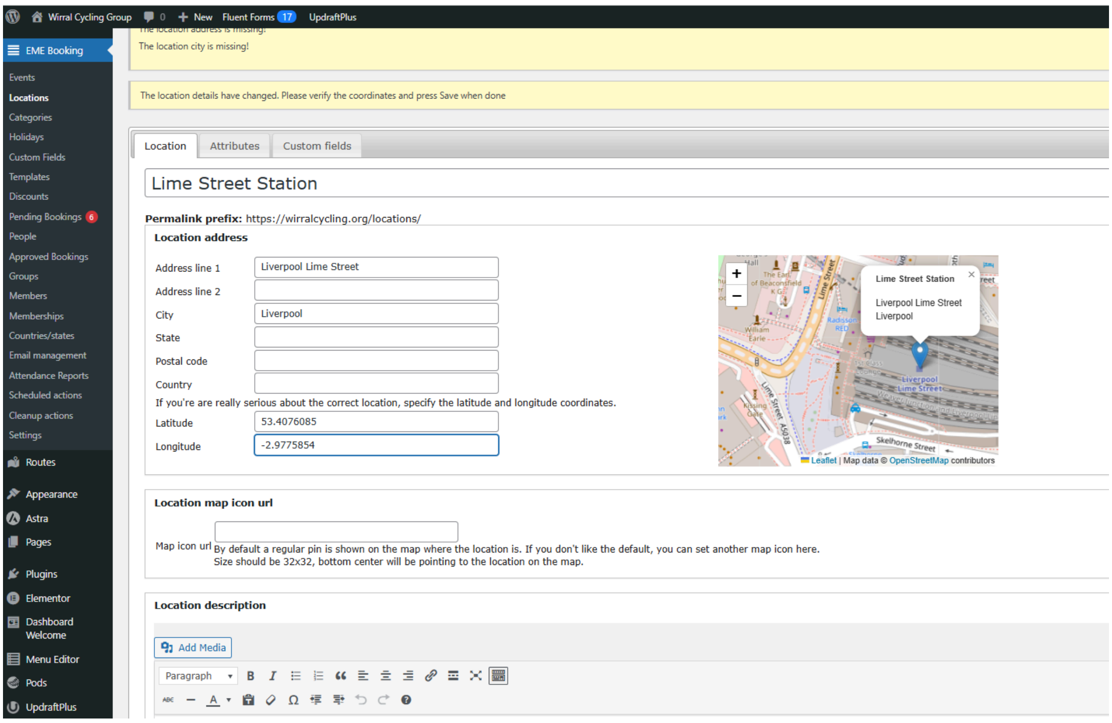
After they receive this email, Ride Leaders will be able to add the details for their ride (time, location, max number of riders allowed, the route, a description of the ride length and speed, lunch venue, etc.) as and when they decide.

3.2 *Locations*

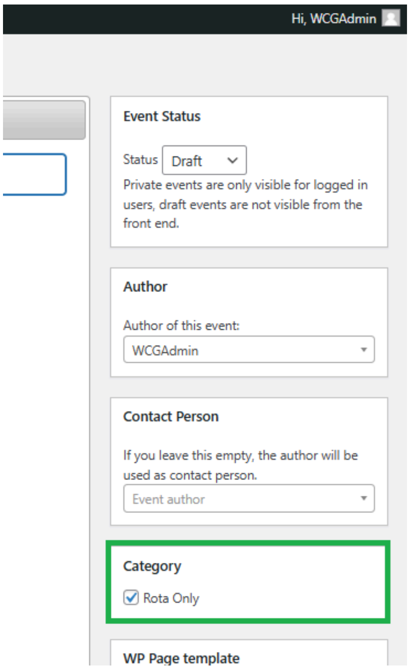
The Location tab is used to display a map of the starting location on the booking page. When adding the details of their ride, the ride leader can select their starting point from a predefined list of locations on the system (by starting to type the name of that location into the box). The software will show all the locations with the letters typed (as shown with “port” below) and the ride leader can click on the correct entry.



If we need a new location, the Ride Coordinator can add one by selecting the ‘Locations’ menu item and pressing the “Add location” button at the top of that page. You should give the location a name that most people will recognise, but you may also have to add an address line and a city to be sure. For example, Lime Street without Liverpool goes to Lime Street in London. You can make fine adjustments to the location by changing the latitude (N&S) or the longitude (E&W). In this example, changing the longitude from -2.9775854 to -2.979 moves the starting point from inside the station to the forecourt on Lime Street.



3.3 *Categories*



We only use one category: ‘Rota Only’.

When the flag is set (with a tick as shown in the picture on the right), a line showing the date of the ride and the ride leader’s name will be shown on the Rota page (so people know who is due to lead on that date), but nothing will appear on the List of Planned Rides. This gives the ride leader time to decide where their ride will go and to add details of their ride before publication. When the Ride Leader removes the tick in the Rota Only box on their ride, the details of the ride will be displayed and people can book onto the ride

3.4 *Holidays*

We don’t use this feature.

3.5 *Custom Fields*

Custom Fields are a feature to allow us to use fields that are not in the standard EME plug-in. We only use one: Emergency Contact details (name and number). This is just a text field shown on the booking form, entered by the person when they make a booking and retained by the system against their ‘People’ record until it is overwritten by a future booking.

3.6 *Templates*

Templates are used to hold sections of text or code that are used in more than one part of the website. So rather than having to type in the same bit of text or code into different records or into different parts of the website every time they are used, the designer just ‘inserts’ the appropriate template.

We use two different types of templates:

1. The first type is a template to hold standard wording that we want to display on pages or in messages. The templates numbered 3 and 4 are examples of this and are used to display a standard message at the top of the booking form (template 3 shows a message for Grade B & C rides reminding people that these rides are only suitable for experienced riders, whereas template 4 shows the message for Grade D rides, explaining that a Grade D ride is a suitable ride for newcomers).

2. The second type of template is used to hold bits of code that can be used in different parts of the website. Keeping the code in the template allows the designer to re-use the same bit of code in many places, and means that when that code has to be changed, the changes are applied wherever the template has been used.

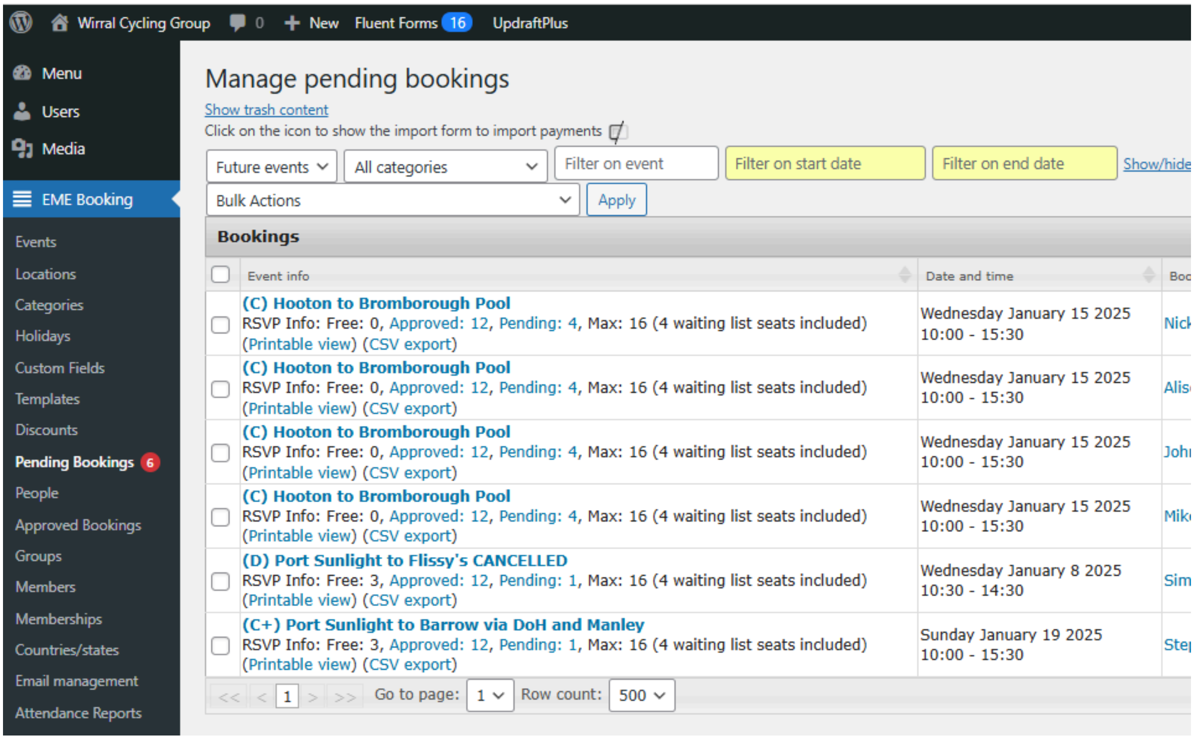
One of the great features of an EME template is that it can include ‘Shortcodes’ or ‘Place holders’. Shortcodes allow the designer to pull in and display components of the EME system, such as booking forms, location maps, list of members, etc. without any programming knowledge: they just need the name of the Shortcode and a few parameters. Here is a link to EME’s Shortcodes: https://www.e-dynamics.be/wordpress/shortcodes/
Placeholders give the designer access to individual fields from the EME system; such as the event title, date and time, or people’s name, email address or telephone number. This link lists all the current EME placeholders: https://www.e-dynamics.be/wordpress/placeholders

3.7 Discounts

Because we do not charge for attending our events, we don't use this feature.

3.8 Pending Bookings

Pending Bookings are bookings that EME has placed on a waiting list because all the places have been booked. Clicking on this section shows all such bookings on any future ride:



It is possible to change Pending bookings into Approved bookings (i.e move someone off the waiting list and onto the ride) using the bulk action 'Approve booking', but be careful if you do this. For example, if there were originally 16 places, plus 4 on a waiting list, and you approve one from the waiting list, there will then be 17 approved bookings plus 4 places on the waiting list; the size of the ride has gone up by one. It is usually best to leave the system alone and not change the status of bookings.

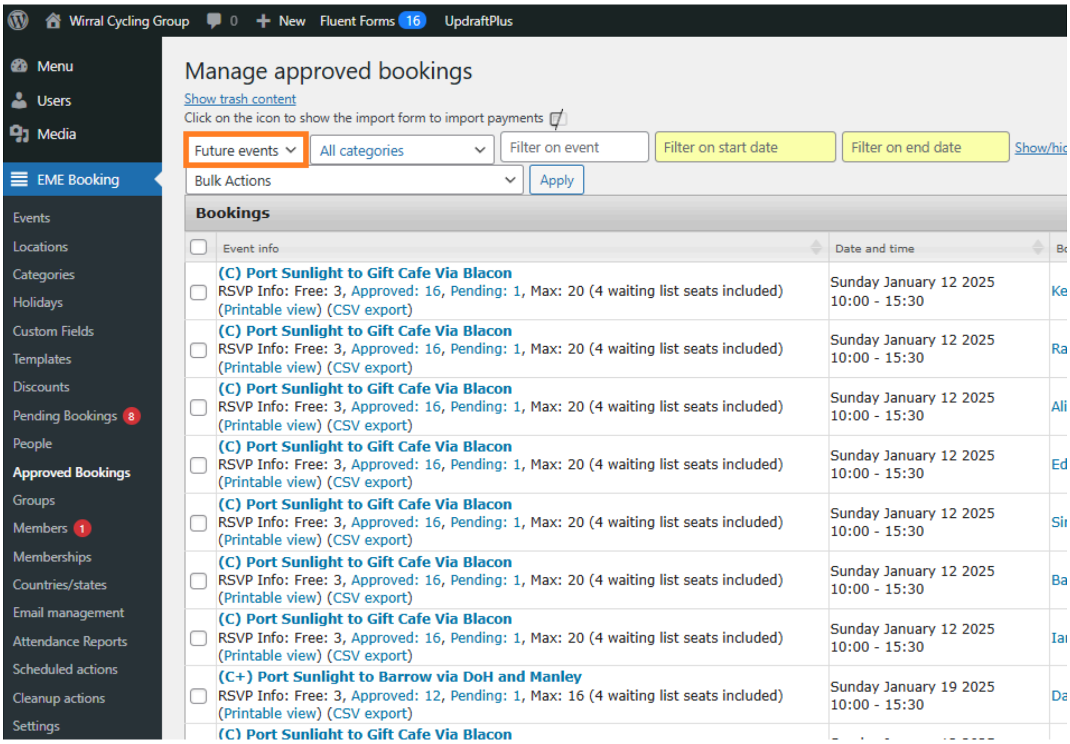
3.9 People

Every time someone makes a booking, the system checks the Last Name, First Name and Email Address that they entered on the booking form and, if that combination is not already on this list, it will add a new person and give them the next Person Id number. So anyone who has booked onto a ride will be on this list (unless their details have been 'anonymized; by the GDPR settings: see Section 3.19, page 22, to see how records are anonymized).

You may occasionally need to go into a person's record to correct some incorrect data, or to add them to, or take them out of, a group (See 3.11 below).

3.10 Approved Bookings

By default this section lists all bookings for Future events; you can see bookings for Past events or for All events by resetting the pull down menu in the box at the top left of the page and pressing the ‘Filter events’ button.



The most common task for an administrator is to delete a booking. People are sent a confirmation email when they make a booking which contains a button that will cancel their booking when pressed; but some people don’t get or can’t find that booking, so ask the ride leader or administrator to delete their booking.

3.11 Groups

Groups offer a way of selecting different sets of people to be displayed on the website and to restrict access to certain Wordpress pages. If people are assigned to a group (through updating their Person record), then we can use the [eme_people] shortcode on a web page to show only those people that are members of a particular group. We use groups to show people on different tabs on the membership page.

We have set up groups entitled:

- **Current Ride Leader** (group_id 1): anyone who is currently available to lead a ride
- **Committee Member** (group_id 2): current members of the WCG committee
- **Ex Ride Leader** (group_id 3): people who have been approved as ride leaders, but are not currently available to lead rides
- **Honorary Member** (group_id 4): people who are members, but no longer have to pay a membership fee
- **Administrator** (group_id 5): people with Wordpress Admin rights; used to prevent WCGAmin (the site administrator Id) from showing on the list of members
- **First Aid** (group_id 6) people who have attended a First aid course run by the group

3.12 Members

Shows the name and membership status of those people who are a “WCG Member”. Anyone who has paid their membership fee at any time is shown on this list. The personal details on the list are copied automatically from the People record that is created when they book onto a ride.

The Treasurer records when people pay their membership fee and the system then sets their membership status ‘Active’, records that they have paid, enters the date that their payment was made, and resets the end date for their membership to 1st October the following year.

After a grace period of 91 days (configurable) beyond the end of the membership year, the system marks the membership status of any people who have not yet paid as ‘Expired’.

NB: There is a record for a fictitious member called “Leader, Required” with a membership status of ‘Pending’ that is used to put the message “Leader Required” onto any dates on the rota without a leader. This is why there is a red circle containing a 1 next to the menu item.

3.13 Membership

The EME plug-in supports different types of membership; we only have one: ‘WCG Member’.

The Membership record for ‘WCG Member’ sets all the parameters for this type of membership. Our membership is fixed with a start date of 1st October for one year. Reminders are sent out to those members who have not renewed on 1st October, a week and a fortnight later, and at the end of October and at the end of November. The price of the annual membership is set in the Price field.

There is a lot more functionality in the membership system that we do not use; allowing members to update their details via the website, on-line payments using PayPal or credit cards, discounts, etc. so most of the fields on the Membership record are left blank.

3.14 Countries/states

We don’t use this facility

3.15 Email Management

Useful for seeing what messages the website has sent out automatically. The system is set up to send out a Confirmation of Booking to the person making the booking and the ride leader, any cancellation of a booking by the person or by the administrator, and reminders of the ride to participants. By default the list shows the last 100 emails with the most recent at the bottom of the list.

3.16 Attendance Reports

When you go to an event these days it is common practice to scan tickets using a QR code or similar to record attendance at the event. But we don’t use tickets, so do not.

3.17 Scheduled Actions

We do not need to use any of these options.

3.18 Cleanup Actions

Best not to use any of these! They are all “dangerous” and we do not need to free space.

3.19 *Settings*

Settings is the place within EME where the system is configured.

EME is a complex system, but we hardly use any of its capabilities. So we have made very few changes to the default settings; and there are only a few places where we have configured the system to our requirements.

The Tabs at the top of the page divide the settings into different sections. We address each section below and list where and how we have made changes to the default settings.

We have not made any changes to the **General**, **Access** or **SEO** sections.

In the **Events** section we have amended the Default event list format to show the information about the ride that we want to display. Below is the HTML code (with Placeholders)

Default event list format

```
<li>#_STARTDATE{l jS F Y}: [eme_if tag='#ESC_AVAILABLESEATS' notvalue='0'] #ESC_AVAILABLESEATS place(s) available [/eme_if]
[eme_if tag='#ESC_AVAILABLESEATS' value='0'] Fully booked<br /><span style="font-weight:normal">There are
#ESC_AVAILABLEWAITINGLISTSEATS place(s) on the waiting list [/eme_if] <br /><b>#_AUTHORNAME</b> #_LINKEDNAME
</li><br />
```

and an interpretation of that HTML code

#_STARTDATE{l jS F Y}:	In a list show the date of each ride, plus
[eme_if tag='#ESC_AVAILABLESEATS' notvalue='0']	if there are spaces on the ride, show …
#ESC_AVAILABLESEATS place(s) available [/eme_if]	… the number of seats available
[eme_if tag='#ESC_AVAILABLESEATS' value='0']	or if there are no spaces on the ride, show …
Fully booked <span style="font-weight:normal">There are #ESC_AVAILABLEWAITINGLISTSEATS place(s) on the waiting list [/eme_if] 	… “Fully booked” followed by the number of places on the waiting list
#_AUTHORNAME	then show the ride leader’s name…
#_LINKEDNAME 	,,, and the title of the ride with a link to the ride itself

And we have changed the display of the Default single event format (the ride booking form)

Default single event format

```
<h2> #_STARTTIME #_STARTDATE <br /></h2>
<b>Current Participants:</b>  #_AVAILABLESEATS space(s) available #_BOOKINGS
[eme_if tag='#_IS_AUTHOR' value='1'] <b>All Participants' Email Addresses:</b> [/eme_if]
[eme_bookings id=#_EVENTID template_id=8] <br />
#_NOTES
#_MAP <br />
#_EVENTIMAGE <br />
<h5>#_EVENTIMAGECAPTION</h5> <br />
#_ADDBOOKINGFORM
```

To show the ride’s start time and date as a Heading, the number of seats available, with a list of those booked onto the ride (with their email addresses only visible to the ride leader), the notes about the ride that were entered by the ride leader, a map of the starting location, an optional image with a caption (if the ride leader has entered an image) and the booking form.

NB: We have not interpreted the HTML code in detail here because it is more straightforward and where it is not, it is similar to the code used in the Default event list format.

We have not changed the **Locations**, **Members**, **Calendars** or **RSS & ICAL** sections.

RSVP is the place where we define the parameters of the ride booking system. We have amended many of the fields in this section:

The system sends out reminders to everyone booked onto the ride a number of days before the ride. That number of days is set in the Send out approved booking reminders box.

The default for the maximum number of riders on one of our rides is 16 (two groups of 8), although this number can be changed by the ride leader, if they wish. The system also provides for people to be put on a waiting list when all the places/seats are booked. The default for the number of places on the waiting list is 4.

To make this work in EME the Default number of seats is set to 20; 16 places on the ride plus 4 on the waiting list.

We aim to prevent people from booking onto a ride at the last minute, so that the ride leader knows who to expect on their ride. To do that we have set the number of hours in By default allow RSVP until this many to 10 hours, which prevents bookings on the day of the ride.

We have changed the Booking on waiting list text box to show the message in red and bold.

The HTML code in the Bookings list format defines how the list of bookings will appear on the details of the ride. The idea behind our settings is that people will be able to see who else is on the ride, if they have a place. or they are on the waiting list; and that the ride leader will be able to see everyone's phone number and emergency contact details.

The HTML code …

```
<li>
<a href="https://wirralcycling.org/wp-admin/admin.php?
page=eme-registration-seats&person_id=#_PERSONID">
<strong>#_FIRSTNAME #_LASTNAME:</strong></a>
[eme_if tag='#_ON_WAITINGLIST' value='1'] <b>(on the waiting list)</b> [/eme_if]
[eme_if tag='#_IS_AUTHOR' value='1'] (☏ <a href="tel:#_PHONE">#_PHONE</a> ⚠
#_FIELD{Contact})[/eme_if]
</li>
```

… says:

Display a list with one line for each person booked onto the ride
Show their first and last name in bold
If they are on the waiting list, add a note to say so.
If the person looking at the list is an Author (i.e. a ride leader) that has booked on, show them each person's phone number and emergency contact details.

In the 'Booking recorded message' we have put the HTML, which tells the person that a message will be sent to the email account that they have just entered:

```
Your booking has been recorded.</br>
An email confirming your booking and containing advice about the ride will be sent to
<b>#_EMAIL</b> within the next ten minutes.</br>
Please look in your Junk/Spam mail if you don't see it.
```

The booking form is the form displayed at the bottom of the ride details page which allows people to book onto a ride.

The HTML code in the Booking form format defines how that form is displayed.

It shows a header, followed by a table that asks for a person's details (which will go into the EME-RSVP-form), followed by a note telling people that the information they enter will be seen by the ride leader.

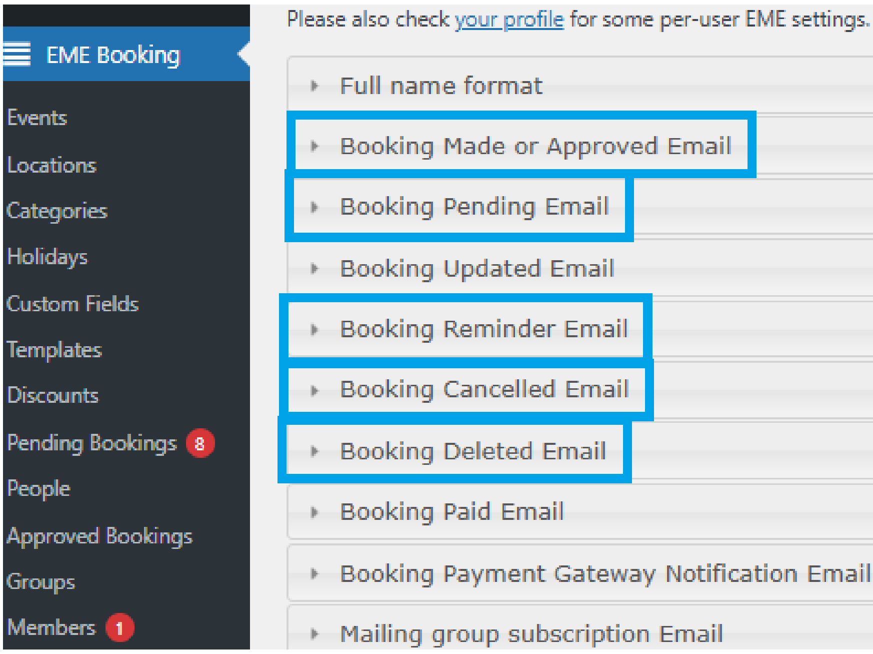
```
<h3> To Book a Place on this Ride</h3>
<b>Enter your details below and press the Send button</b>

<table class='eme-rsvp-form'>
 <tr><th style="text-align:left" scope='row'>Last Name:</th><td> #_LASTNAME</td></tr>
 <tr><th style="text-align:left" scope='row'>First ame:</th><td>#REQ_FIRSTNAME</td></tr>
 <tr><th style="text-align:left" scope='row'>Address including
                      Postcode:</th><td>#_ADDRESS1</td></tr>
<tr><th style="text-align:left" scope='row'>E-Mail:</th><td>#_EMAIL</td></tr>
<tr><th style="text-align:left" scope='row'>Phone number:</th><td>#_PHONE</td></tr>
<tr><th style="text-align:left" scope='row'>Contact Name & their Phone Number (in case of
                     emergency):</th><td>#REQ_FIELD{Contact}</td></tr>
<tr><th style="text-align:left" scope='row'>Places:</th><td>1 #_SEATS</td></tr>
</table>

 #_SUBMIT

<b><br />GDPR:</b> Please note that when you make a booking, the information that you
enter above will be recorded and passed to the ride leader
```

We have only changed two boxes under the **EMail** tab.

We have set the Default email sender name to "Wirral Cycling Group" and the Default email sender address to "sh-826381705@eu.hosting-webspace.io" which is the address of our email server on Ionos.

Email Templates

The system can send out emails automatically for many different circumstances. We only use a few.



When a booking is made the system sends an email to the person making the booking and to the ride leader of that ride. The wording on those emails is set in the “Booking Made or Approved Email” section under Booking Made Email Body to:

Dear #_FIRSTNAME,

You have a place booked on #_LINKEDNAME starting at #_STARTTIME on #_STARTDATE. Click here to add an entry to your Google Calendar.

By booking onto this ride you agree that:

- you will act responsibly and adhere to the rules of the road and countryside;
- you acknowledge that it is your responsibility to ensure that any manoeuvre that you make is carried out safely;
- you confirm that you are fit and healthy enough to participate in the ride;
- your cycle is in a safe, legal and roadworthy condition (see GCN's 6 Checks Before You Ride);
- you have read Cycling UK's advice on riding in a group;
- you understand that Cycling UK or Wirral Cycling Group cannot be held responsible for any personal injury, accident, loss, damage or public liability during the ride.

If you haven't done so before, you should read WCG's Risk Assessment for Group Rides. It lists all the potential hazards that we can think of when riding in a group. But it then sets out what we as a group and as individual riders can do to minimise the severity of those hazards and reduce the likelihood of those hazards occurring.

On the day we suggest that you should bring:

- wet weather wear and warm clothing
- a spare inner tube, a pump and tyre levers
- some food and drink to keep you going
- money for emergencies (and possibly lunch)
- a mobile phone

and that you should carry details of your address and an emergency telephone contact number, just in case.

> PLEASE NOTE that we have a limited number of places on each ride, so if you find that you are unable to go on the ride, then use the link here to cancel this booking and free up the place for another person: #_CANCEL_LINK

Yours sincerely,
#_CONTACTPERSON (Ride Leader)
Telephone: #_CONTACTPHONE, e-mail: #_CONTACTEMAIL

NB: Guests who are not members of the group can attend up to three rides before having to apply to join the group.

…and Contact Person Booking Made Email Body to:

#_FIRSTNAME #_PERSONLASTNAME (#_PERSONEMAIL; #_PHONE) will attend #_LINKEDNAME on #_STARTDATE.
There are now #_RESERVEDSEATS place(s) booked, #_AVAILABLESEATS are still available.

Yours faithfully,
Events Manager

NB #_LINKEDNAME displays the name of the Event/Ride as a hyperlink to the Event/Ride itself; so if the person reading the email clicks on the name of the ride it will open a page with the ride details.

In the “Booking Pending Email” section we have altered the contents of the Booking Pending Email Body to:

> Dear #_FIRSTNAME,
>
> Your request to book on #_LINKEDNAME starting at #_STARTTIME on #_STARTDATE is pending and will remain pending until either an existing booking is cancelled or the number of places is increased. Please check the details of the ride to see if your booking has been approved before attending.
>
> **PLEASE NOTE** that we have a limited number of places on each ride, so if you find that you are unable to go on the ride, then please use the link here to cancel this booking and free up a place on the waiting list for another person: #_CANCEL_LINK

If the person reading the email clicks on #_CANCEL LINK it will take them to a page with the option to cancel their booking.

We have set up the system to send out reminders a few days before each ride (to prompt anyone who has forgotten about the ride to get themselves ready or cancel their booking). So in the “Booking Reminder EMAIL” section, we have changed the Accepted Booking Reminder Email Body text to:

> Dear #_FIRSTNAME,
>
> This is an automatic reminder that you have booked a place on #_LINKEDNAME on #_STARTDATE.
>
> Yours faithfully,
> #_CONTACTPERSON
>
> **PLEASE NOTE:** we have a limited number of places on each ride, so if you find that you are unable to go on the ride, please use the link here to cancel your booking and free up the place for another person:
> **#_CANCEL_LINK**
>
> If you need to contact the ride leader for any other reason their contact details are e-mail: #_CONTACTEMAIL, telephone: #_CONTACTPHONE.

The #_CONTACTPERSON is the ride leader (Set in the Ride Details) and their Email address and ‘phone number are taken from their User record.

If a person cancels their booking, or if the booking is cancelled by the ride leader, the system sends an email to the person. The text of that email is set in “Booking Cancelled EMail” section in the Booking Cancelled Email Body:

> Dear #_FIRSTNAME,
>
> Your booking for '#_EVENTNAME' on #_STARTDATE has been cancelled.
>
> Yours faithfully,
> #_CONTACTPERSON
>
> ***NB:*** *If you have not cancelled the booking yourself, it may be that the ride has been cancelled by the ride leader. Please check our website https://wirralcycling.org/ and/or the group's Facebook page [WCG on Facebook](), or contact the ride leader for further information* `(#_CONTACTNAME, #_CONTACTEMAIL,#_CONTACTPHONE).`

If the booking has been cancelled by WCG admin a different message is sent (under the "Booking Deleted Email" section:

> Dear #_PERSONFIRSTNAME,
>
> Your booking for a place on '#_EVENTNAME' has been deleted by WCG Admin.
>
> Yours faithfully,
> #_CONTACTPERSON, #_CONTACTEMAIL

Under the **Data protection** tab we set Automatically anonimyze old bookings to 730 days (two years). That removes people's details from rides that were more than two years ago.

And we set Automatically remove old events to 1095 days (three years) which removes events older than three years from the system

We haven't made changes to the **Payments**, **Maps** or **Other** tabs.

4. Routes

We use the Posts facility of Wordpress to store and display many of the routes that the Group has used in the past. Each route is added as a Wordpress Post.

New routes can be added using the Add Routes button at the top of the page.

But we need a specific format for the title:

nn miles, Grade X: start place to destination via place on route

It must begin with the length of the ride in miles (so the system can sort by length of ride), then the text " miles, Grade " followed by the grade (B, C or D) and immediately a colon (so that people can search for a specific grade with the letter & a colon), then the rest of the title should be the names of the start, to the destination, via a place or places on the route.

The body of the post should describe the route, any specific conditions about the ride (hills, conditions of the roads and tracks, etc.) and have a link to the route file on one of the common route planning systems, Komoot, Ride with GPS, Garmin Connect or Strava, etc..

And at the bottom of the post there are mandatory fields for the name of the person who planned the route, the length of the ride in miles and the grade of the ride (B, C or D).

Here is an example of a completed Route post:

48 miles, Grade C: Chester to Alyn Waters via Bangor-on-Dee and Erddig

48.3 miles, Grade C, quite a few hills, but nothing too steep (nothing worse than 6%) with three gravel path sections (each about 1/2 mile) similar to the Wirral Way.

The route goes out through Chester by Dee Lane and the Groves, then across the Old Dee Bridge and out to Eccleston, Pulford and Rosset, before skirting around the West of Marford Hill and Wrexham to Bangor-on-Dee, where after 18 miles we will take a break by the bridge over the river. Then carrying on South West to Overton, before turning back North to cross the river again at Overton Bridge, going on to Eyton and the National Trust parkland of Erddig House, passing Wrexham on the East this time, and then through Moss Valley Country Park and over to Alyn Waters Country Park where after 34 miles we will have lunch. People can bring their own sandwiches or eat at the cafe in the park.

After lunch it is 14 miles back to Chester via Cefn-y-Bedd, Caergwrle and Hope, with a long (mostly) downhill run through Higher Kinnerton and Bretton to the Saltney Ferry bridge and then along the banks of the Dee, down Canal Street and St Anne Street to the railway station. Or, if you have had enough cycling for the day, you can catch a train from Cefn-y-Bedd (36 miles), Caergwrle (37 miles) or Hope (38 miles) to Shotton (for Chester), and on to Neston, Heswall, Upton and Bidston.

Click here to see the route on Komoot: Chester to Bangor on Dee and Erddig

---

48 miles, Grade C
Created by John Hampson

The Posts are displayed on the website using the TABLEON plugin which allows users to filter and sort the list of routes by Distance and Grade, and to filter routes by place name.

NB: As of January 2025 we have more than 200 routes loaded on the system, (which seems plenty for a small peninsular), so there is little need to add any more routes

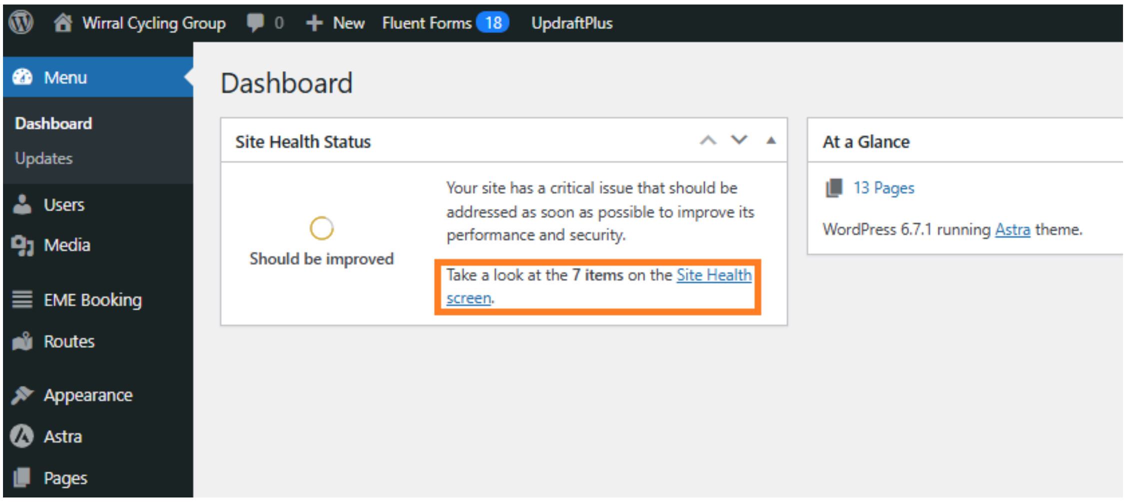
5. Website Maintenance Tasks

There are some maintenance tasks that need to be done on a regular basis to make sure that the website keeps working smoothly. They don't have to be done at any particular time, but shouldn't be left for too long.

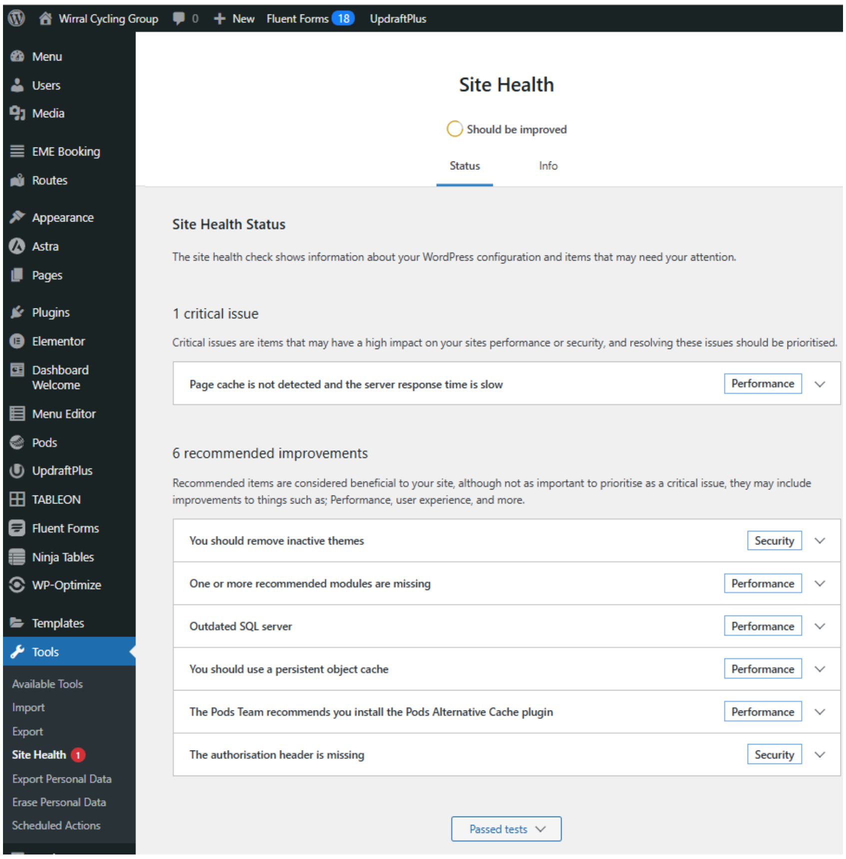
5.1 Check the Warnings in the Site Health Status on the Dashboard

When you log on to the site as Administrator it will display the Site Health Status. This is a list of suggestions by Wordpress intended to improve the performance or security of the site based on a few parameters of the site. It is a useful list to check, but on occasion it is wrong!

To see the list click on the link marked 'Site health screen'.



It will then display suggestions for improving the website.



But be careful: They are not always good suggestions: and some of the suggestions are bad!

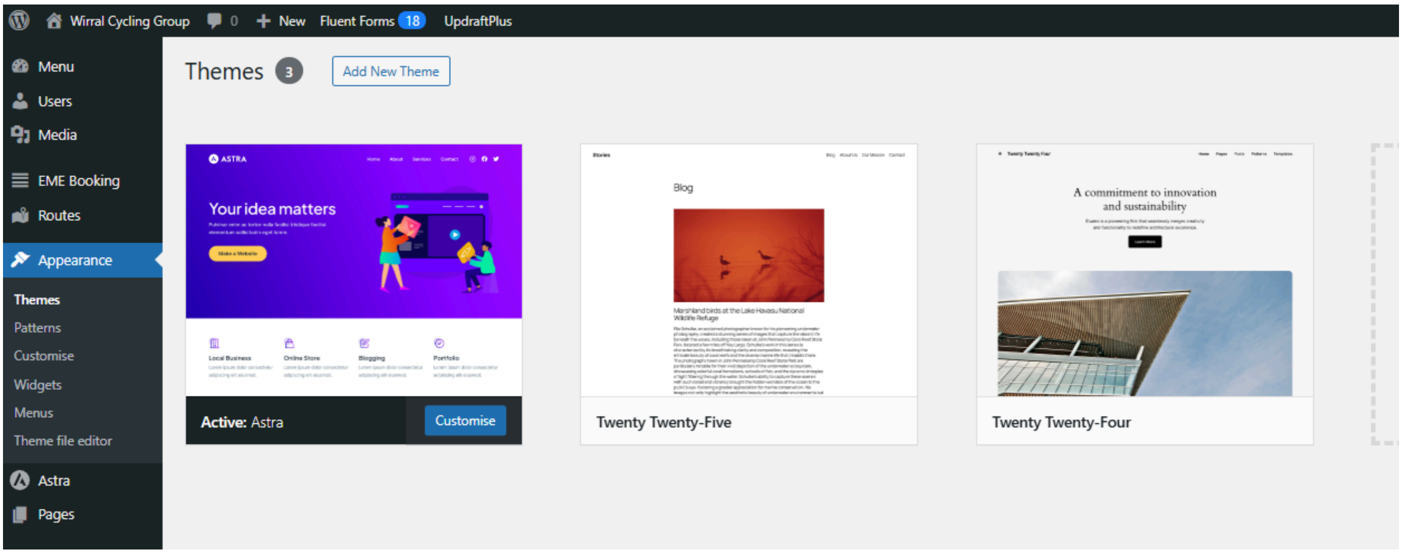
For example, despite the SIte Health page identifying the lack of Page Cache as a Critical Issue, ***NEVER INSTALL PAGE CACHING !!***

Page Caching aims to speed up a user's access to a page on a website by not waiting for the website to search for and display the page requested, but instead (while waiting for a response) it displays a copy of the page that the user saw last time.

This is a good idea when pages don't change very often, but Events Made Easy uses dynamic pages with a "nonce" (number used once) to check the validity of any booking request. So with Page Caching installed, Events Made Easy will see the previous version of the page which will have an old, no longer valid number, and so it will reject the booking with the message that the Booking Form has been tampered with.

Therefore, despite what the Site Health Status messages tell you about the site being slow, DO NOT load any form of Page Caching!

In the example on the previous page, the only thing that needs updating (and it isn't that important) is to remove an inactive theme.



We use the Astra theme, but it is good practice to have a spare theme already loaded just in case something goes wrong with Astra. Wordpress provides a new theme every year, so in January each year delete the old spare theme (Twenty Twenty Four in the example above).

The other five messages above are irrelevant. The site works just fine as it is.

5.2 Check if Themes and Plug-ins need to be updated

Most of the site's Themes and Plug-ins will be updated automatically without you having to do anything, but occasionally one will require you to initiate an update. A red circle will appear next to the Updates menu item. Updating a theme or plug-in is straightforward; just press the button suggested.

Note: The Events Made Easy Plugin is not updated at all. That is because the developer has pulled out of the programme with Wordpress that allows automatic updates. So our version of EME is static and does not change. See this document for an explanation of why: https://www.e-dynamics.be/wordpress/forums/topic/security-release/

5.3 *Deduplicate EME People records*

Events Made Easy allows anyone to make a booking, and the information that they enter on the form when making a booking (name, email, phone number, address, contact number, etc.) is stored on the system and can be seen in the “EME Booking” menu under “People”.

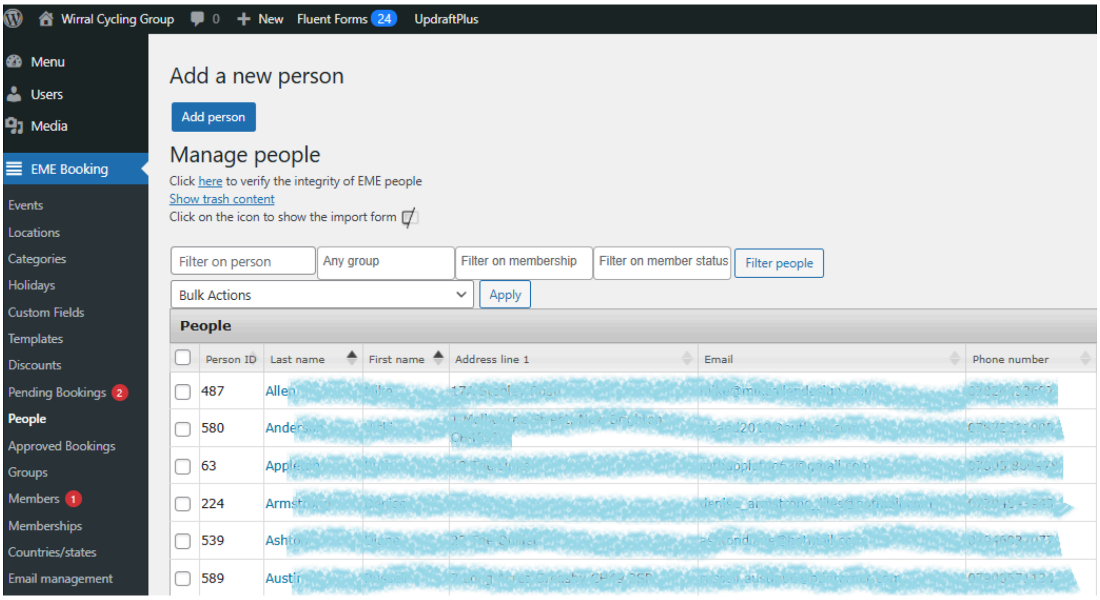
If their details are already on the system (i.e. a person with that first name, last name and email address is already on the system), EME will add the new booking and update their existing record with whatever data is entered for this booking.

But if they are a new person (i.e. a new name or email address) then Events Made Easy will create a new People record from that booking form.

This is fine if the person really is a new person, but quite often people who have booked before and are already on the list will type a slightly different name or email address (Dave instead of David, David.Smith@gmial.com instead of David.Smith@gmail.com, Smit instead of Smith,etc.). When that happens Events Made Easy does not know that they are the same person as someone already on the system and will create a duplicate record for them.

So every few months (before the list gets completely out of hand) someone has to look at the list of People, identify the duplicates and remove them.

To find a duplicate record check the list of People when it is sorted by Last Name. Then go down the list looking for people with the same (or very similar) last names and first names.



When you find what looks like a duplicate record, you first need to make sure that it is a duplicate (and not just two people with the same name). You can check phone numbers, contact details, address etc. to decide if they are the same person. Then you need to work out which record or records to delete and which one to keep. It isn’t always obvious.

So, on the following page are a number of examples of different situations, with suggestions of how to resolve them.

Before starting to look make sure that you list of people shows the following fields: *Person ID, Last name, First name, Address line 1, Email, Phone number, Created on, Modified on, Groups, member of, and Contact.* You can display those fields by right-clicking on the bar with the column titles and selecting the fields that you want to display. You can sort by Last name by left-clicking on the title of the Last name column.

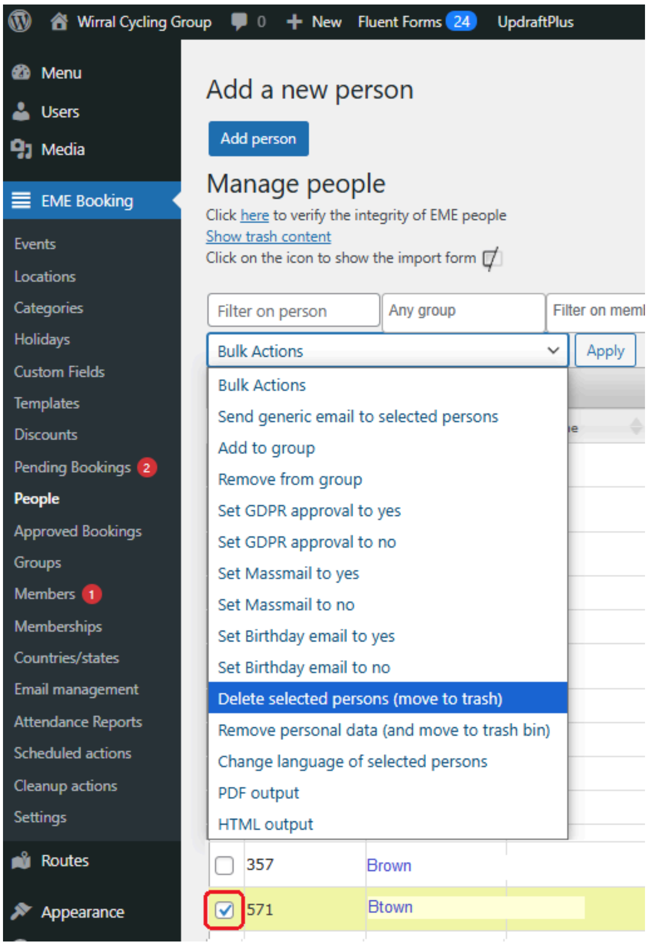
Example 1: Typing error

EME decides that a person is a new person if the combination of their first name, last name and email is new. So if someone makes a typo when entering any of those fields on the booking form, EME creates a duplicate record. For example:

357 Brown John JohnBrown@outlook.com 07123456789 First Aid WCG Member
571 Btown John JohnBrown@outlook.com 07123456789

In the example above John Brown hit the “t” instead of the “r” and so created a duplicate record. But, in this case, the first record (Person ID 357) is the person recorded as a WCG member, so we must not delete that record or their membership would be removed as well.

So to remove the second record (571), put a tick in the box next to the record (on the left side). See diagram here →



Only tick the records you want to delete. The background of any selected records will turn yellow.

Then go to the Bulk Actions box and choose Delete Selected Person (move to trash).

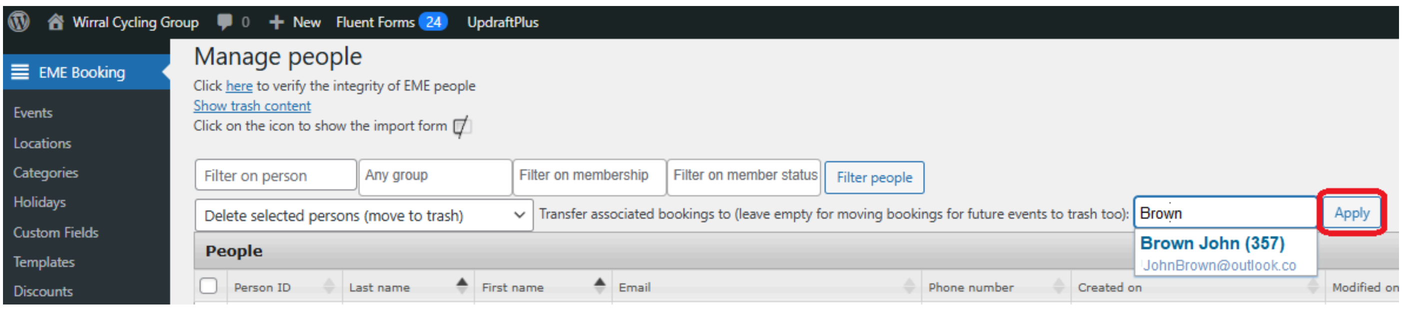
You are about to delete the duplicate record, but you need to make sure that any bookings that have been made using that record are transferred to the correct person.

Also check that details such as the address or the emergency contact are the same on both records; if not you will have to decide which is correct and then set up the record you are going to keep with the correct information.

So, first, remember the Person ID of the record that you plan to keep.

Then, start typing the name of the correct person in the box entitled “start typing a name”.

As you type, the choice of people. names will be reduced. Select the one that is the correct record (the one with the Person ID number of the record that you want to keep). And, after you have checked again, press the “Apply” button and the duplicate record will be removed.



Example 2: Shortened names

The most common reason for a duplicate record is that the person has used the long and the short version of their first name at different times (for example David or Dave, Sue or Susan)

The hard bit here is to decide which record is correct. One tip is to look at the bookings made on each record and see which version of their name the person has been using most recently; and settle on that version.

But if they are a WCG member, you must retain the record which was used for their membership. And that might have the 'wrong' version of their first name. If that happens go into the record used for their membership and change their first name. Then, as in the first example, delete the duplicate record and transfer any bookings to the remaining record.

However there is a complication if the person is a ride leader or an ex-ride leader. Ride leaders are given access to Wordpress as "Authors", but when they are given that access Wordpress uses the person's name as it was at that time. Those Wordpress Author details cannot be changed afterwards; and they must match with the EME People record.

So you will most probably have to keep the record with the original version of the name and delete the other (making sure to keep the record with the WCG membership).

This is usually straightforward, but can get complicated. It is possible to change the first name on the Wordpress Author record, but only by deleting that record and creating another with the right details.

Example 3; Different email addresses

If people change their email address, EME will decide they are a new person (same name but a different email address).

Here you need to first check that they are really the same person, and then decide which email address is correct. Checking which address they have used for recent bookings may help you to decide. Sometimes though you may have to send an email to both addresses asking the person to tell you which address they want us to use.

When you have decided how to resolve the duplicate, select the record you want to delete and transfer the bookings to the record you want to keep as in Example 1 above.

But the complication of the person being a ride leader or an ex-ride leader needs to be addressed first. Their Wordpress User ID will have used the older email address, so if they have updated their email address, you need to go into their Wordpress User ID and change the email address there. Once you have done that, it will change on their People record and you can then remove the duplicate record from the People list.

Example 4: First and last names reversed

Occasionally a person will put their first name in the last name field and vice versa. These are harder to spot (but look for a first name in the last name field). If you find one, update the people record to get the names the right way around, and then remove the duplicate in the usual way.

Example 5: Two different people

Don't forget that occasionally there are two people with the same name. Make sure that you do not delete or merge their records.

5.4 *Tidy up Ride Details*

The details of each ride are entered by the ride leaders themselves, but sometimes they make a mistake or don't stick with the conventions for the records. So it is useful if someone keeps an eye on what is being entered, corrects it if necessary, and tells the ride leader what they have done.

The convention for entering the title of a ride is to begin with the Grade of the ride in brackets. The reason is that at the end of the year the only way we can work out how many rides we ran of each grade is to list the rides whose titles begin "(B", "(C", "(D", etc.. So if you see any rides that don't conform to this pattern, please change them.

A common error is to not set the start location for the ride (most probably because it is on a different tab to the other details). This isn't a problem provided that the description is clear about the starting point, but if the Location is not set, there will be no map on the booking page.

Another common mistake is to set the date range for more than one day. In EmE an event can stretch over several days, but our rides are always on one date. So people need to make sure that the Start and End dates are set to the same day.

And a third common omission is to type in the URL address of a link to route planning software, but forget to tell the system that it is a link. To do this type in the URL, then click on the little Link icon and change the settings accordingly (not forgetting to tick the 'Open link in a new tab' box.