# 1. Club Website Support Process

The Club Website has been in existence for several years and was originally developed using WebMatrix (a Microsoft tool). This tool allowed website creation by directly editing HTML pages, C# code and style definition files. This version of the website was migrated in 2021 to use WordPress, which requires far less use of programming languages to create or update web pages.

Principal aspects of how the website is edited, tested and then 'made live' is depicted in the following diagram.
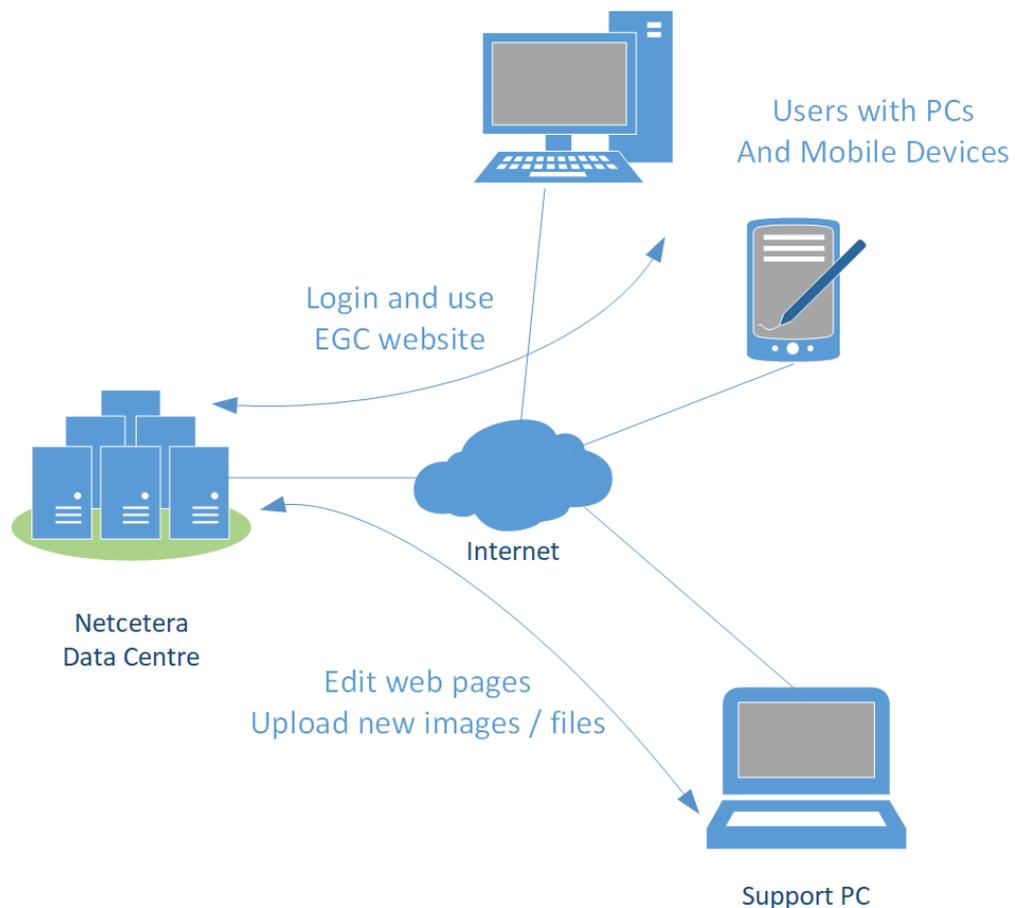
All elements of the live website are stored on a web server hosted at a Data Centre by a company called Netcetera who specialise in such services. The Club pays (a relatively small fee) for this service which provides:

- 50GB of disk storage for the files that make up our website.

- The domain name of easthampsteadgolfclub.co.uk.

- Up to 100 e-mail accounts – the club uses accounts for each of the committee roles.

- A 'management interface' for the website, called Plesk that allows file management, e-mail account addition / changes etc., and also controls the configuration of WordPress.

- File transfer mechanisms that support copying files between the Netcetera web server and a local support PC – this feature uses the industry standard File Transfer Protocol (FTP).

Both the support PC shown, and normal users' PCs and phones use the standard internet to connect to the Netcetera services. The name 'www.easthampsteadgolfclub.co.uk' is resolved 'under the covers' using the Domain Name Service (DNS) to an IP (Internet Protocol) address of the right web server within Netcetera's data centres.

The support PC (although there can be more than one) needs nothing more than a web browser to connect to the management facilities of WordPress. In fact, just like a normal user, website design starts with logging in to our website exactly as a normal user would. However, management accounts have been given additional permissions that are recognised on login by WordPress, resulting in additional options being presented on screen. Those additional options provide for:

- Editing of existing pages or creation of new ones.

- Viewing of the structure and data of the database, helpful when debugging issues.

- Synchronising files between the Netcetera Web Server and the local support PC when required.

2. A WordPress Website Overview

A feature of all WordPress based websites is that page creation and editing are all performed directly on the live system using the same URL normal users use. WordPress determines which options to present to a user depending on the permissions their login account has been granted.

For all normal members of the mens club, when they login they will see our standard website home page:
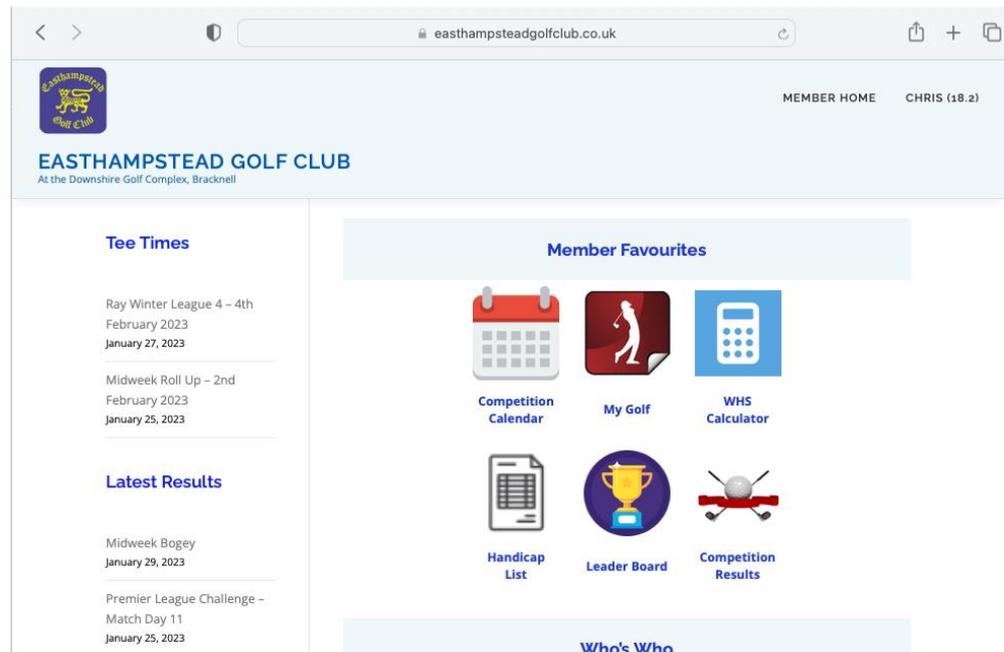
But when a user with administration permission logs in there is a new menu displayed at the top of the screen, as well as other menu options changing:
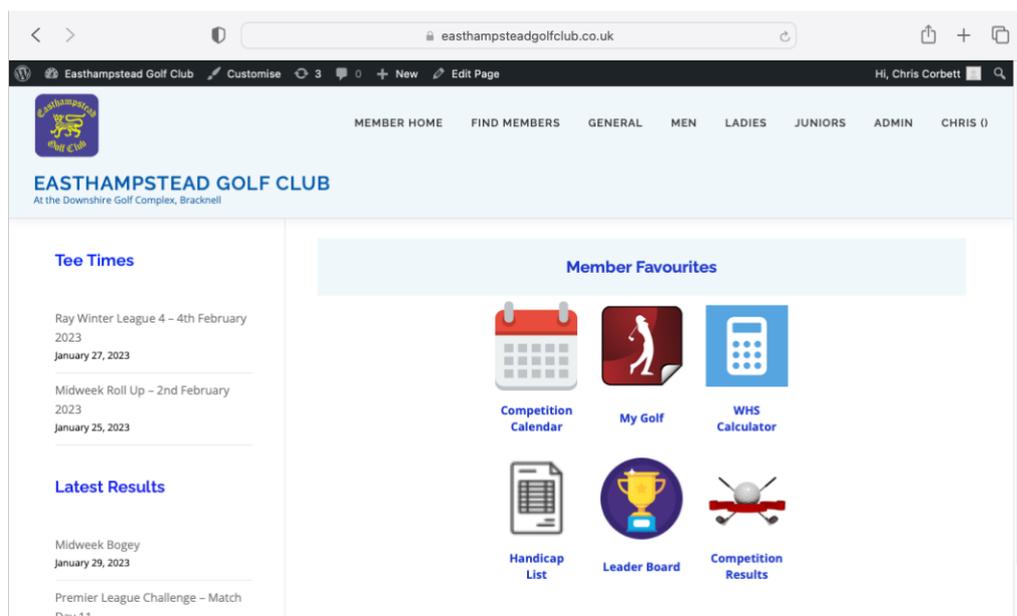

WordPress determines how and what is displayed on a page from a user's permissions and so for an Administrator a new black line of options appears at the top of the page, as well as changes to the main club menu.

The same feature is used to determine what is displayed for members of the mens, ladies or juniors clubs. Every account holder on the website automatically belongs to a User Role or group. We have the following basic user roles setup:

User Role	Purpose
Mens Member	A member of the mens club
Ladies Member	A member of the ladies club
Juniors Member	A member of the juniors club
EditorMen	A men's member, but can also edit pages and manage users
EditorLadies	A ladies' member, but can also edit pages and manage users
Administrator	Access to all administration facilities of WordPress

We shall describe later how roles are defined and assigned to members.

We have already seen how WordPress uses roles to decide whether to show administration options, from the previous example screens. Roles are also used to change what is displayed depending on whether a user is a member of the ladies or junior's clubs. Here is what the ladies' members page looks like after login – WordPress has automatically selected this display because the user logging in has the User Role of 'Ladies Member':
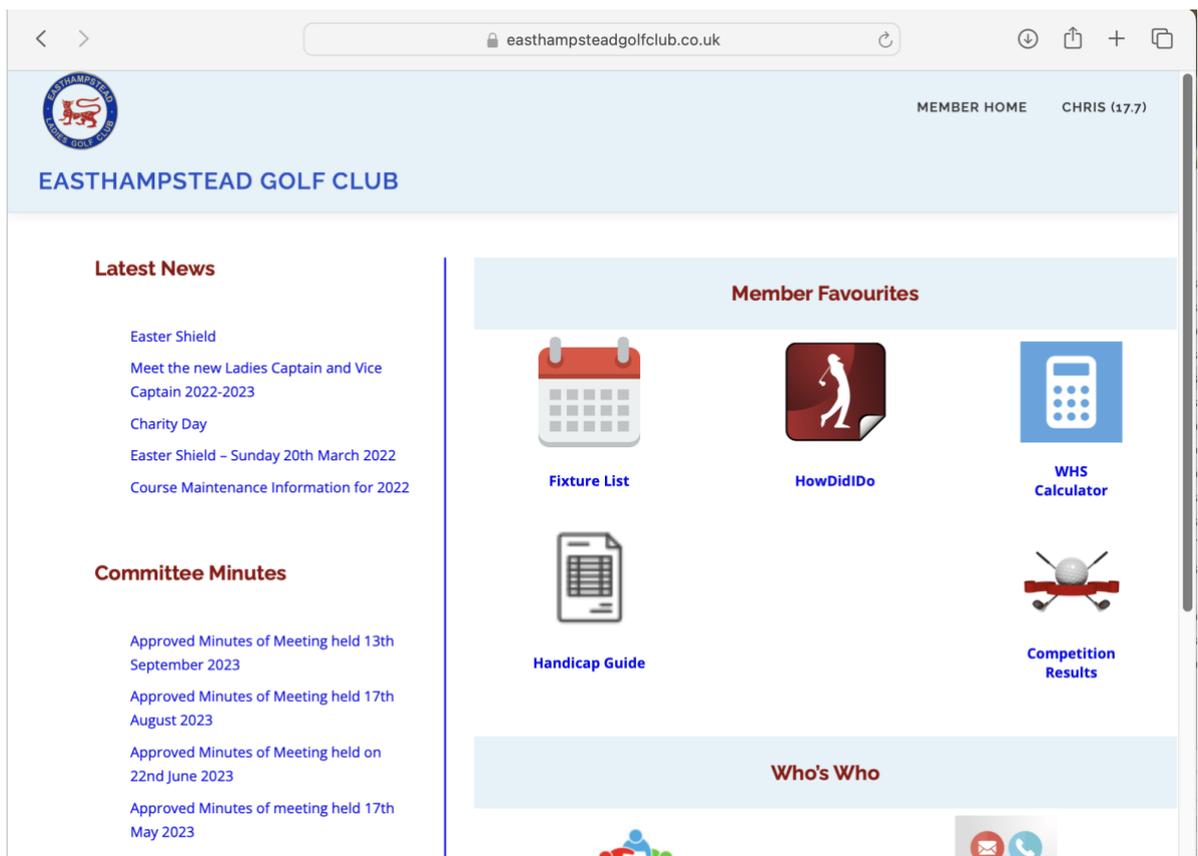
The men's home page display has gone, and the menu at the top shows the 'ladies' club logo option, which does not appear on the men's pages. The left hand sidebar and menu options are different.

WordPress can decide what pages, which sections of pages, and what menu items are displayed depending on the Roles that a user has, which makes it a very useful feature for our use.

3. Using WordPress to Add New Pages and Posts

Now that we have introduced WordPress as the website authoring tool, in this section detail is provided on the most common tasks for adding information to our specific club website.

3.1. Introduction

Basically, all the dynamic information on the website, such as competition results and news items, is added using the concept of 'Posts' in WordPress. A Post is just another web page, designed and put together using the page editor built into WordPress. This editor is very flexible, able to create pages with text and pictures (such as a news item), or create pages that include an uploaded file, such as a pdf file containing competition results.

In this section the steps to correctly add a 'Post' of the required type are described. That is, adding a 'news item' Post will always result in that information appearing in the 'News Items' list in the right section of the website. Or adding a 'Results' Post will automatically add that file to the list of results on the results page.

3.2. Post Categories

When a Post is added to a WordPress website, in addition to adding the text and pictures that make up that Post, the writer selects from a list what type of Post it is. This is called the Post *Category* in WordPress terminology. This is very important in ensuring that a Post ends up in the right place on the website.

On the EGC website, Post categories have already been defined and here is the complete list:

Name	Description
Gallery	Place any items for the gallery in this category. Typically attach a file containing photos.
Junior News	Place any items to appear on the Juniors News section in this category
Ladies Archived News	Items in this category are originally Ladies News items marked so as no longer to appear on home page.
Ladies Information	Items in this category will appear on the Ladies Information page.
Ladies News	Items in this category will appear on the Home Page under 'Latest News' heading.
Ladies Results	Place any results uploads into this category for the Ladies Golf Club.
Ladies TeeTimes	Place ladies competition tee time files in this category.
Mens News	Items in this category appear on the Home Page under 'Latest News'.
Mens Results	Place competition result sheets for mens competitions in this category.
Mens TeeTimes	A post that contains a tee times file for a men's competition.
Newsletters	Place any newsletters published into this category. Attach the newsletter in pdf format as a linked file.
Minutes	Minutes from Annual General Meetings, other club meetings and supporting documents should go here.
Deleted	Use this category to mark a Post as deleted if it is not needed anymore – i.e. change its existing category to this one.

Uncategorized	Default WordPress category – added to Post if no other category is selected.

In the next section, we walk through an example – creating a Post that publishes a Results File from a Men's club competition.

3.3. Process to Publish a Results File

In Figure 1 is the men's results page. This exercise is to add a new results file to the list shown. At the top of the page in the black line[1] is the WordPress options for editing the site. Hover the mouse pointer over the '+ New' option and the dropdown shown will appear. Choose 'Post' from this list.
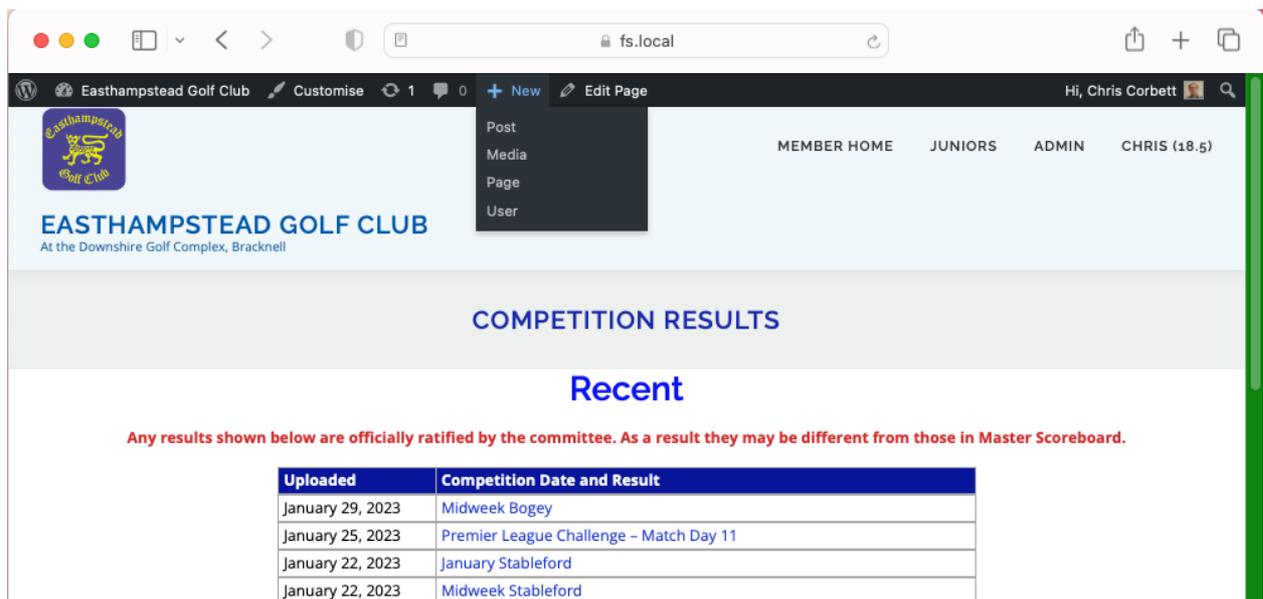
Figure 2 Mens Results Page with drop-down Menu

The new Post editing screen will appear as shown in Figure 2 below.

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[1] Only logged in members with the right privilege will see the black menu line, as discussed earlier.
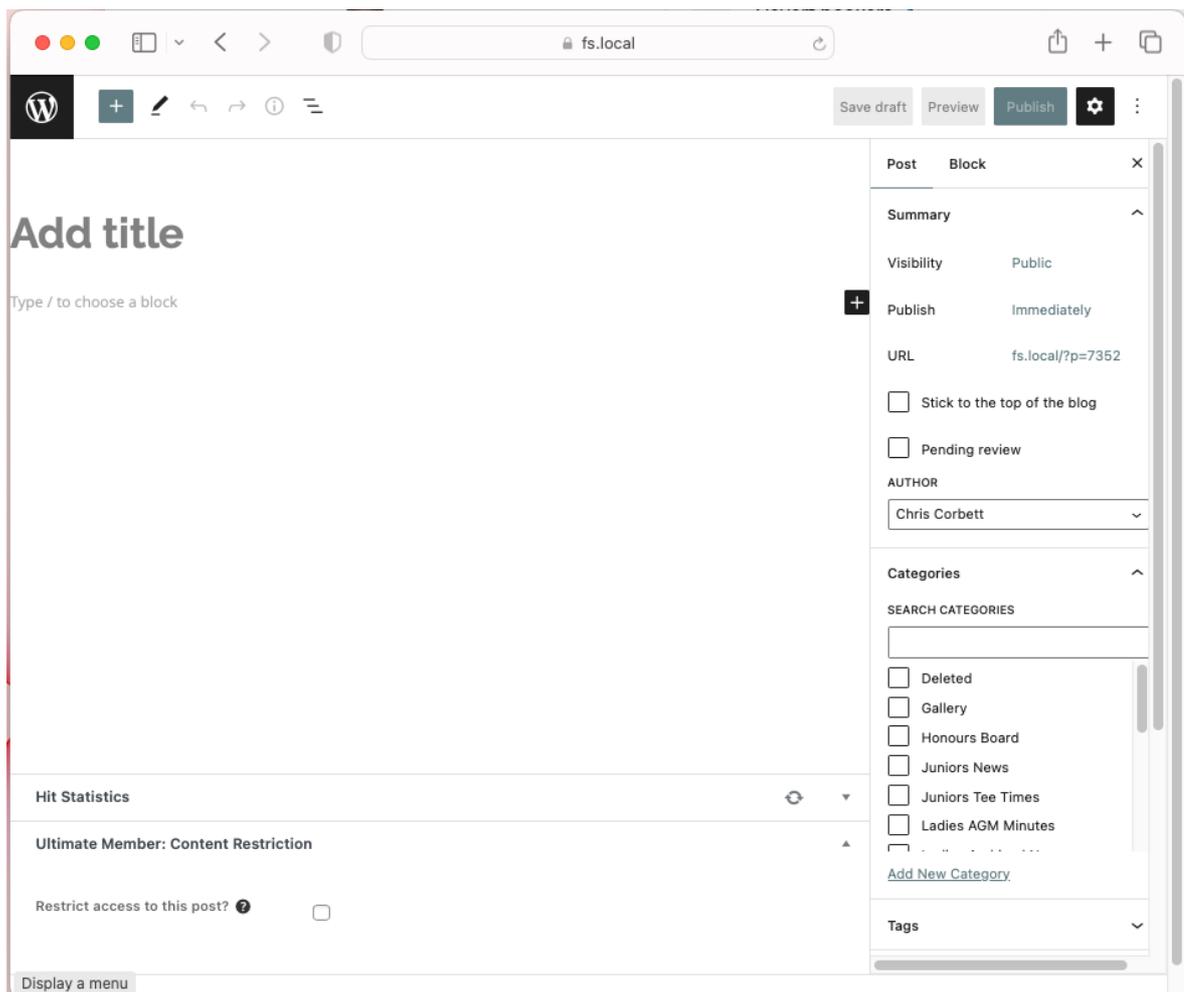
Figure 3 Edit A Post Page

We will turn this blank Post into a results file entry by giving it a title and by uploading the required results file to a link in the Post.

First the Title. Place the mouse pointer in the 'Add title' field and type a title that indicates what the result file is for. The title can be absolutely any text, but it is strongly suggested to stick to a standard format so that all result titles look the same:

    <date> <Competition Name>

For example:

    10/02/2023 Midweek Stableford

Once the title is entered, the next step is to add the uploaded file, so it is available as a link to download on this new page. WordPress provides a facility for this. Click the '+' sign just below the title to see the list of available 'blocks' – items such as images and

text you can add to the page. Choose the File block (type 'File' in the search box if File is not visible as an option) as highlighted in the example below:
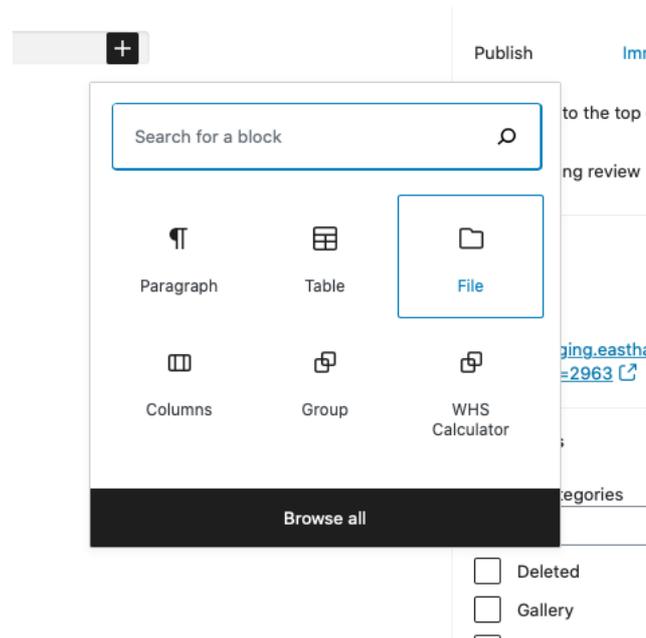

Figure 4 Selecting the 'File' block type

Once 'File' is selected, a dialogue box requesting the file to upload appears:
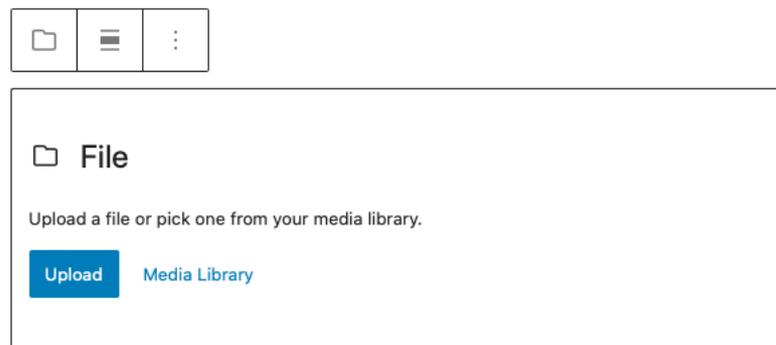

Figure 5   Upload file Dialogue Box

Click the blue 'Upload' button and select the file you want from the directory viewer that appears. It is recommended that all uploaded files should be in pdf format. Once selected, the file will be uploaded and the file dialogue box will change to:

Figure 6 Upload file Completed

*Note: make sure you click off the button under PDF settings on the right 'Show inline embed'.

The name of the file is listed, followed by a predefined Download button. When this page is viewed (rather than being edited) the file name is shown as a clickable link that displays the file just uploaded. Rather than keep the name of the file there, it is suggested that the filename is just overtyped with some standard text. You can do this – it does not change the link to the actual file underneath. Here is the recommended text to overtype:

Figure 7 Filename replaced with more useful text

That's it for adding text to the page.

There is a very important step to remember though – to place this new Men's Results Post into the correct category. Looking back at Figure 2, on the right-hand side is the list of all possible Post categories (make sure 'Post' is selected and underlined rather than 'Block'). Make sure 'Mens Results' is the only category ticked.

Once that is done click 'Publish' at the top, and then 'Publish' again when the confirmation dialogue appears. A small black box will appear at the bottom of the screen. Click 'View Post' in this box and you will see what this new Post will look like to a club member.

If you notice anything wrong at this stage, just choose 'Edit Post' in the top black bar and you can make any corrections. Once done choose 'Update' and 'View Post' again to make sure all is correct.

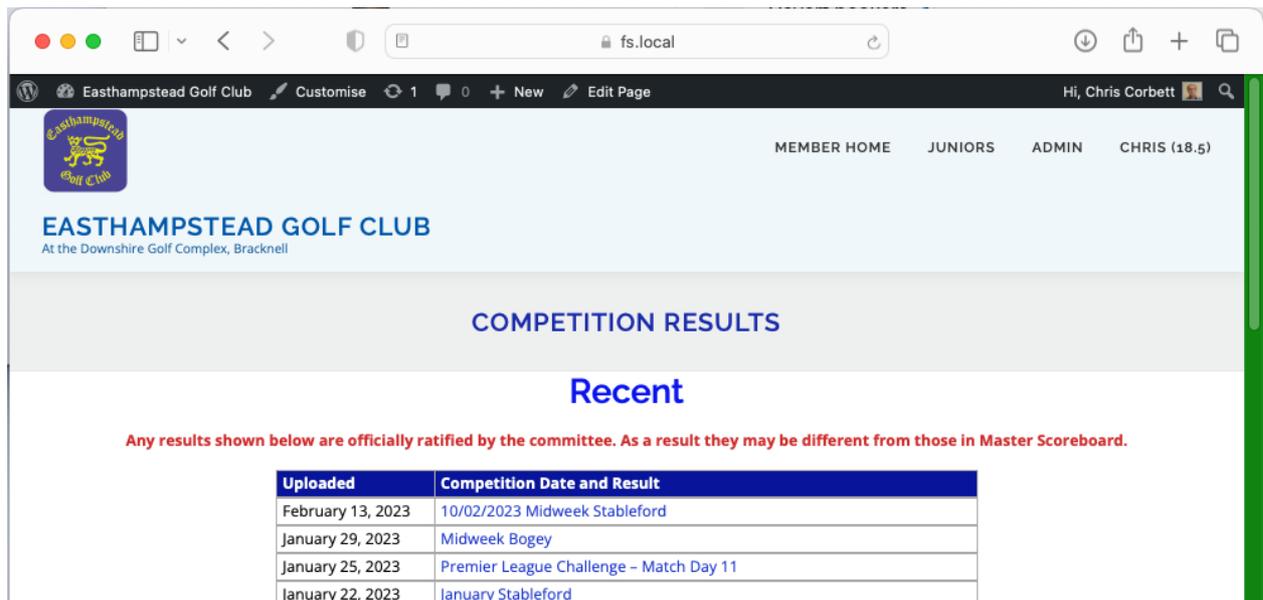And now, if you visit the 'Men's Calendar' page again you will see this new entry in the results table:

Figure 8 The Resulting Post as it appears on Website

Click the title of the result and the new Post page just created will be displayed, and from there the results file can be viewed or downloaded.

The 'Recent Results' table in the figure above displays results from the previous 4 weeks. Older results are displayed in a table at the bottom of the men's calendar page.

To remove results no longer needed, select the Result Post from the table, choose 'Edit Post' then un-tick the category 'Men's Results' and tick the category 'Deleted'. Posts in the Deleted category will be cleaned up at a later date.

The following categories of Post are handled in exactly the same way as 'Men's Results'. In each case the resulting Post will appear on a list on the page indicated:

Category	Listed on this page
Ladies Information	Ladies Information Page
Newsletters	'Newsletter & Minutes' Page
Minutes	'Newsletters & Minutes' Page

3.4. Process to Publish a News Item

This is very similar to the steps needed to publish a results file in the last section. Start with a blank Post editing page, add text and images to it (anything at all), place the Post in one of the News categories and publish. The new Post (news item) will appear under one of the News lists on the home page of the web site.

An example will show the similarities to the previous case. Assume we want to publish an article about the Club Tour Week for next year. It will be in Portugal, and we have selected the dates and Venue. We want people to express their interest and those that do to pay a deposit. In this news article we probably want to sell the trip with some nice pictures of the venue, and to provide an initial idea of the golf courses that will be visited. So, we shall use a title, picture of the venue, a table with a list of courses, and some text describing the itinerary.

Start by select '+ New' and Post as previously, when the Post Editing screen appears make sure 'Mens News' is selected as the category:

Figure 10 Creating a News Item

Type over where 'Add Title' is displayed with something like 'Club Tour to Portugal 2021'. Then click the black '+' below the title and select 'Image' from the list of blocks. A dialogue box for uploading an image will appear:
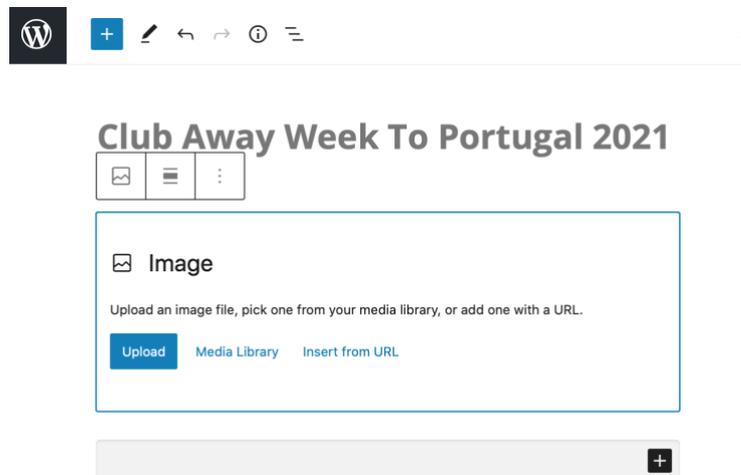

Figure 11 Adding an Image to a Post

Select Upload, then select a picture that you have previously saved in a folder on disk. Once selected, the editing page will change to show the image:
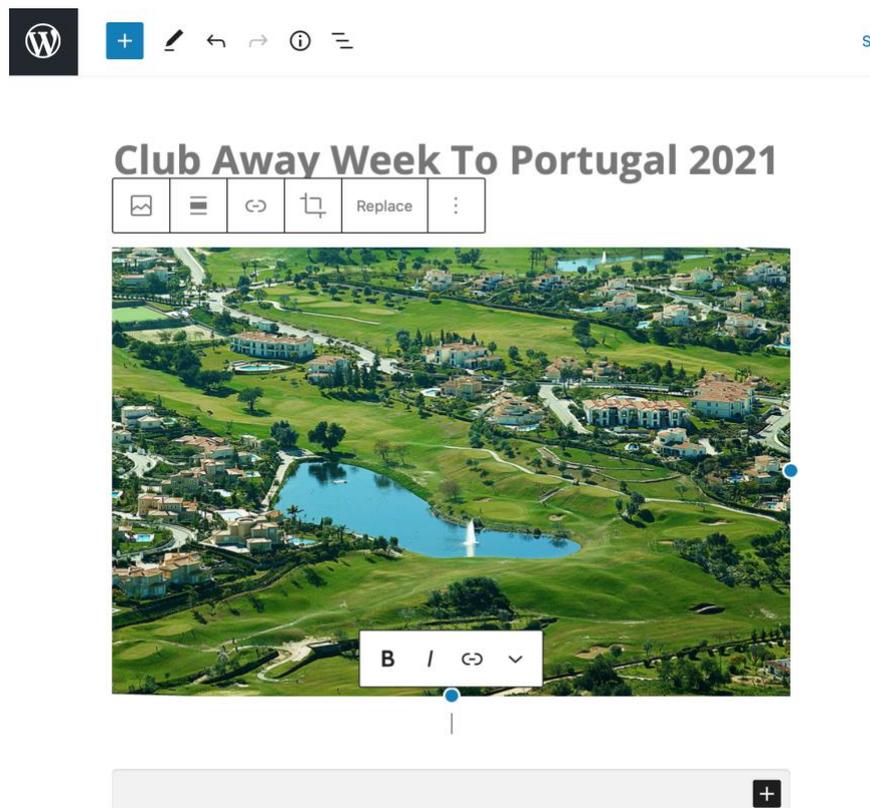

Figure 12 Page after Image Uploaded

Now to add some text, click either in the grey box to the left of the '+' sign, or click the '+' sign and choose 'Paragraph' from the block options. Then type any text you want, as many paragraphs as required. Here is an example:

Club Away Week To Portugal 2021

At the 4-star Pestana Carvoeiro in the Algarve, there are 5 championship golf courses ready for us to enjoy. Just 45 minutes from Faro airport, this resort is easy to get to and well worth the journey.

The two courses on the property have strong championship pedigree having hosted elite ladies and senior championships on many occasions. Pestana Carvoeiro has outstanding self-catered accommodation consisting of apartments, townhouses and villas as well as being very close to some of the best beaches in the Algarve, this resort is the perfect place for families or large groups of golfers.

Pestana Carvoeiro offers the chance to play some of Europe's best courses in one of its most stunning locations, a great choice for any golf break.

Start writing or type / to choose a block

So now we will finish with a table at the end showing the itinerary in terms of courses to be played, and then some more text to explain what those interested must do next. First the table. Click the grey text at the end of the page 'Start writing or type / to choose a block' then the '+' sign that appears at the end of the line. Choose table from the list of blocks and select 2 columns and 5 rows. The screen will look like this:

ladies and senior championships on many occasions. Pestana Carvoeiro has outstanding self-catered accommodation consisting of apartments, townhouses and villas as well as being very close to some of the best beaches in the Algarve, this resort is the perfect place for families or large groups of golfers.

Pestana Carvoeiro offers the chance to play some of Europe's best courses in one of its at choice for any golf break.

⊞ **Table**

Insert a table for sharing data.

Column Count   Row Count

2   5   **Create Table**
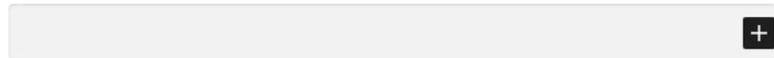
Click Create table and type in a day and date in the first column and the name of a course in the last column. This is only an example, so it does not matter what the detail actually is. Here is a completed example, including the final text in a paragraph block:

At the 4-star Pestana Carvoeiro in the Algarve, there are 5 championship golf courses ready for us to enjoy. Just 45 minutes from Faro airport, this resort is easy to get to and well worth the journey.

The two courses on the property have strong championship pedigree having hosted elite ladies and senior championships on many occasions. Pestana Carvoeiro has outstanding self-catered accommodation consisting of apartments, townhouses and villas as well as being very close to some of the best beaches in the Algarve, this resort is the perfect place for families or large groups of golfers.

Pestana Carvoeiro offers the chance to play some of Europe's best courses in one of its most stunning locations, a great choice for any golf break.

Mon 20 Sep 2021	Gramacho Course
Tue 21 Sep 2021	Silves Course
Wed 22 Sep 2021	Free day
Thu 23 Sep 2021	Alto Golf and Country Club
Fri 24 Sep 2021	Vale Da Pinta Course

Golf Courses Booked for Tour

If you are interested in joining the tour please add your name to the sign up list on the Club noticeboard at the Downshire. Deposits of £100 will be required by 1st Jan 2021.

Make sure now that your click 'Publish' to save the post, then 'Publish' again to confirm. Also make sure you have ticked the 'Men's News' category box. Once publishing is complete, go to the home page and in the News and Events section you will see the new Post:

includes GolfGuard Insurance; it does of course exclude green fees which you would pay direct to the Complex...

monthly Stablefords plus many Trophy competitions, playing both on a Thursday and one day each weekend...

Juniors under the age of 12 have normally progressed through the Junior Academy...

News and Events

Mens	Ladies	Juniors
Club Away Week To Portugal 2021	Mixed Pairs Knockout 2020	
October 29, 2020	September 20, 2020	
World Handicap System	Ladies Club Championship 2020	
August 28, 2020	July 7, 2020	
Paying Competition Entry Fee	Golf Monthly Article	
August 12, 2020	November 28, 2019	
Interim Playing Rules **Updated**		
July 1, 2020		

Contact Details

Just click on the title to see the post.

There was quite a lot involved in this post – we created a web page with a title, followed by an image, then a paragraph of description, then a table providing an overview itinerary, then a closing paragraph.

A Post can range from just one simple announcement in a paragraph, to as many blocks of images, tables and text (or any other of the WordPress block types) as you like.
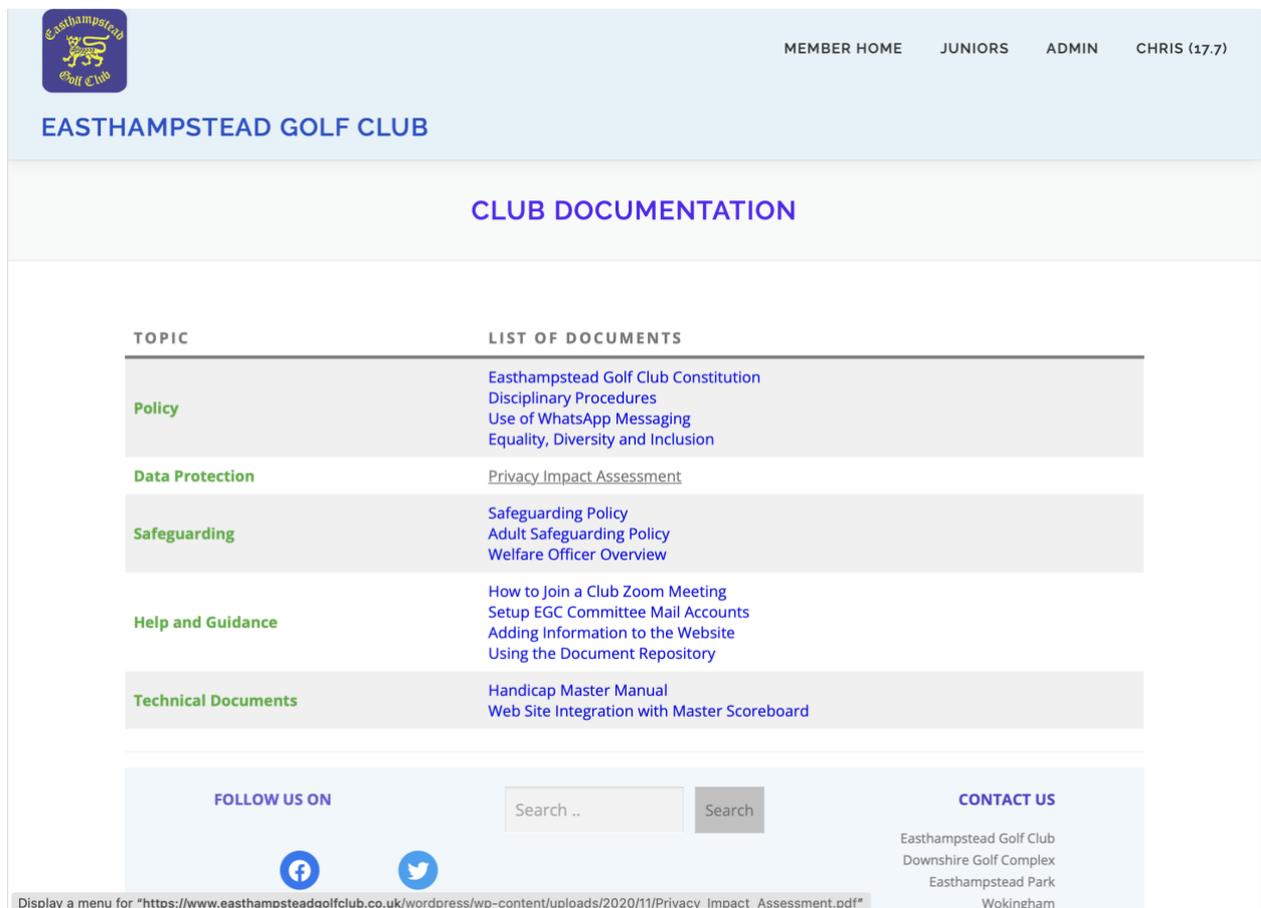
As you produce and edit Posts the whole process of putting a web page together will become much easier.

This section about news items applies to Mens, Ladies or Juniors news; just place the news item in the appropriate category.

3.5. Static Documents

There is a class of documents stored on the website for viewing that are not dynamic in the sense of Posts. Instead, they contain fixed, date independent information. At any one moment in time only the current version of the document is valid. Examples of such documents are the Club's Constitution, Disciplinary Procedures and Help documents. Rather than treating these as a Post, they are handled on the website as direct hotlinks. As they are not Posts, when they need to be updated (which should be rare) a different approach is needed.

WordPress allows links to files to be inserted on any text anywhere on a page. Examples of pages that contain these document links include the 'Ladies Committee' page and the Men's 'Club Documentation' page. The picture below is a screenshot of the Men's Club Documentation page, with the mouse pointer on the hotlink to the committee members list. With the mouse 'hovering' over such a link, your browser will show which file the link points to; this can be seen at the bottom of the screen. In this example it is a long hyperlink to a file called 'Privacy_Impact_Assessment.pdf'.


When you want to replace a file with an updated version, find this file name first. You will need it to search in the Media Library for the same file. The Media Library is where WordPress stores all images and documents used by the website.

Of course, you also need to be ready with the new version of the file. This needs to be in pdf format, in any directory on your PC/laptop/tablet. We search for it and upload it in the process for replacing the current file. Interestingly, it does not need to be the same name as the current file.
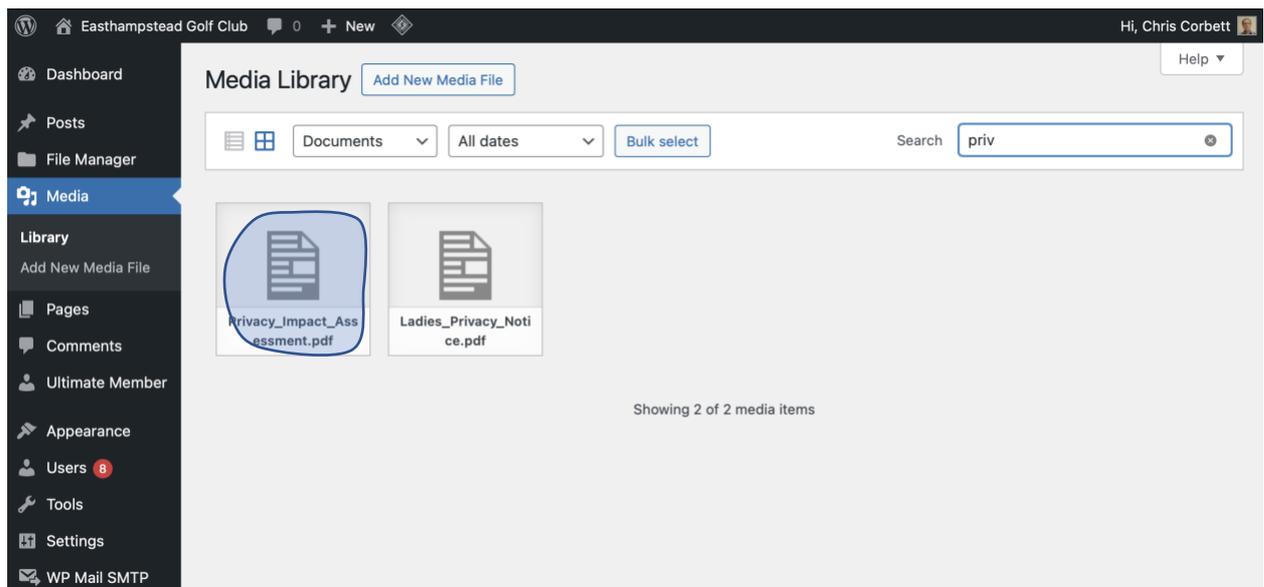
Once you know the name of the current file that needs replacing, and you have the new file ready, do the following to replace it. On the black menu bar at the top of the screen, hover over 'Easthampstead Golf Club' and choose 'Dashboard':
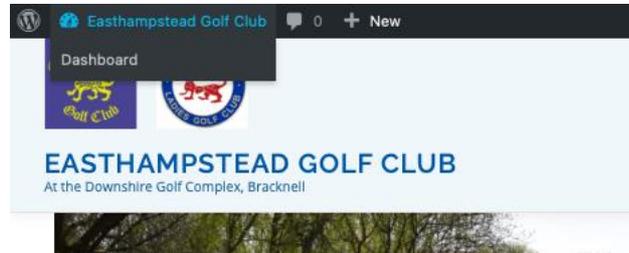
The following screen will then be displayed:
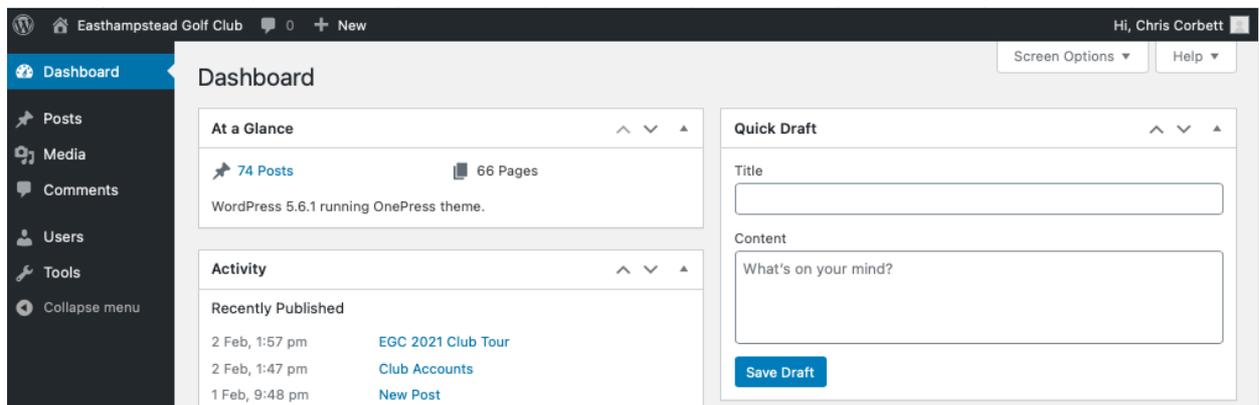
Choose 'Media' from the menu on the left:

To help narrow down the search of our example you can type 'priv' in the search box as this example shows – or any part of the file name of interest. The screen above

shows the two files whose names match 'priv', with the one we are interested in highlighted.

Click the file entry once you have found it and the attachment details screen is displayed:

On the right hand side near the bottom, there is a 'Replace media' label. Click the button labelled 'Upload a new file'. The Replace Media Upload screen will appear:

Attachment details   < > ×

Uploaded on: 19 February 2021
Uploaded by: Chris Corbett
File name: Privacy_Impact_Assessment.pdf
File type: application/pdf
File size: 367 KB

Title   Privacy_Impact_Assessment

Caption

Description

File URL: https://www.easthampsteadgolfc

Copy URL to clipboard

Required fields are marked *

Replace media   Upload a new file

To replace the current file, click the
link and upload a replacement file.

View attachment page | Edit more details | Download file |
Move to Bin

Click the Choose File button, select the new file from your PC directory using the viewer that appears, ensure 'Just replace the file' is selected and also 'Replace the date'. Then click the upload button. A confirmation screen to confirm that the file has been replaced.

Go back to the web site page with the hotlink, and check that this is indeed the new file.

Because web browsers 'cache' data for speed, you may still see the old file at this stage. To force the new one to load on your home computer, type 'CTRL-R' on a PC, or 'CMD-R' on a Mac, or use your browser settings to clear its history before reloading the web page.

4. The Document Repository

4.1. Introduction

The club website hosts the *document repository* – disk storage in which all vital club documentation can be stored and retrieved. This provides a single, central place in which club documents can be accessed by all. All updated and new documents produced for the club should be placed in the document repository.

It is important to distinguish the document repository from the rest of the website, they are not directly linked. A member viewing the website has no access to the documents in the document repository. Files in the document repository are accessed in much the same way as a directory viewer in Windows or a Mac. This can be seen in the screen shot below:
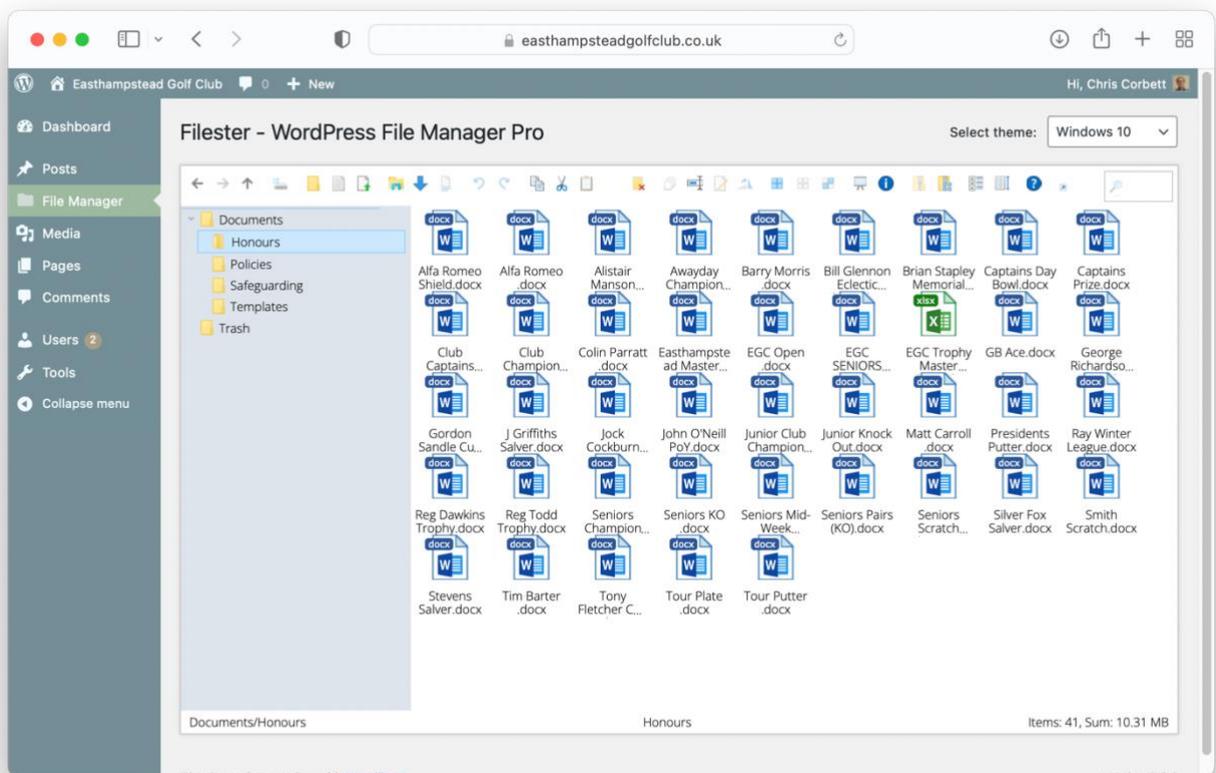

Figure 13 How the Document Repository Appears

This is a screenshot from a web browser (Safari), after logging in to the EGC website and choosing File Manager from the left-hand menu. Like any directory viewer, the main part of the screen then shows the folders making up the document repository on the left-hand side, and for a selected folder the files within it in the right-hand side. In the example, 'Honours' is the selected folder, and all the word documents in that folder are shown.

Only club members who have been allocated the right privilege can access the repository. You will know whether your account has this privilege because a black bar at the top of your web browser will be visible:
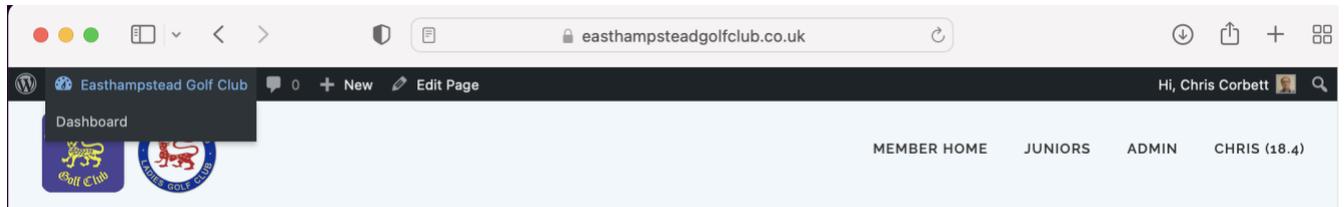
Hover over 'Easthampstead Golf Club' at the top and the 'Dashboard' option will appear. Click on this to get to the screen in Figure 1. Alternatively, under 'Admin' in the right-hand menu, choose 'Document Repository'.

The Document Repository should be viewed as the master location for all club documents. The latest version of any document we produce must always be stored here. In this way, important historical records will always be available to any future club committee.

Effective use of the document repository requires strict adherence to a process of document editing and update. Bearing in mind an example, such as the club's disciplinary policy which is a Word document, the change process would be:

1. Locate the document in the repository.
2. Check out the document from the repository, which involves downloading it to a folder on your local PC/Mac.
3. Edit the document as required on your PC. Review it if necessary, so that a new stable version of the document has been produced.
4. Check the updated document back in to the repository.

The same process is valid for just about any document type. Here is the current list of document types that can be stored:

- Word documents and templates (.docx, .dotx)
- Excel files and templates (.xlsx, .xltx)
- Powerpoint files (.pptx)
- PDF files (.pdf)
- Plain text files (.txt, .csv)

The repository will actively prevent any other document type from being uploaded, but if there proves to be a need to include other document types the list can easily be expanded.

The process of using the repository will be explained now in more detail in the following four sections.

4.2. Document Process

4.2.1. Locate the Document

Clearly you need to know which document you need, and overtime as familiarity increases with how the document repository is organised you may know exactly where it is. In the meantime, there are two clues that will help trace a document as illustrated in the screenshot below:
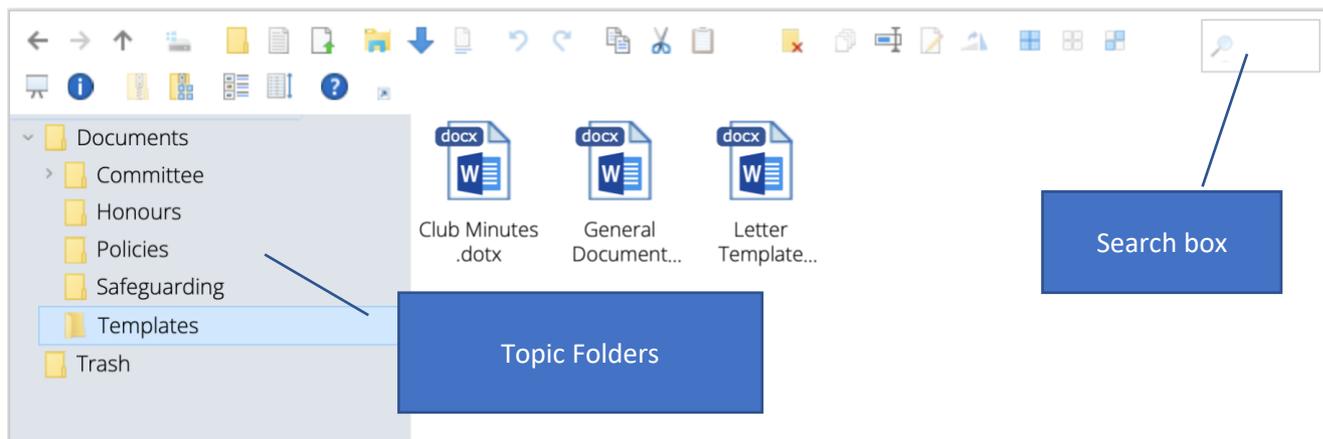

Figure 14 Document Location features

The Topic folders on the left are hopefully designed to create a logical and obvious structure for locating a document. But it may not be completely obvious, for example the Constitution (a Word document) can be found in the 'Policies' folder.

With potentially many documents stored, the best option may be the second, and that is to use the Search option provided in the top right of the screen. The search box works only for document titles, it cannot see inside and search on contents, nor can it contain wildcards. But it can search with a partial title. So, for example to find the document 'EHGC Constitution.docx', you can enter any of the following and it will be found:

> "EHGC"
> "EHGC Const"
> "EHGC Constitution"

4.2.2. Check Out a Document

This is a fancy way of saying copying it to your PC hard disk.

But in addition, we need to be mindful of the situation where two people may be changing the same document. In Document Repository applications that you must pay for, it is usual for the application to 'lock' a document once one person has checked it out. Only that person can edit the document, and it can only be subsequently edited by someone else once that document is checked back in. But we cannot do that here.

So, we need to ensure we have a manual process that ensures with a high degree of confidence that one document is not being changed by 2 people at the same time. If this were to happen, when the documents are checked back in, the first check in will work and so will the second, but the latter will replace whatever changes were made by the first person.

In reality in our situation this is unlikely to occur and anyway we can guard against it by ensuring no changes can be lost as described above. Most committee roles are individuals that at any moment in time are looking after their own roles' sets of club documents. Even so we can additionally do a couple of simple things to mitigate this problem, with one of those steps included in the checkout process:

1. Having identified the document we wish to change, send a message on the Committee WhatsApp group giving the title of the document and that you will be checking it out for changes. Agree priority with anyone who admits they are editing it too.
2. With the document showing in the directory viewer of the repository, right click over the document with the mouse and a context menu will appear as shown below:
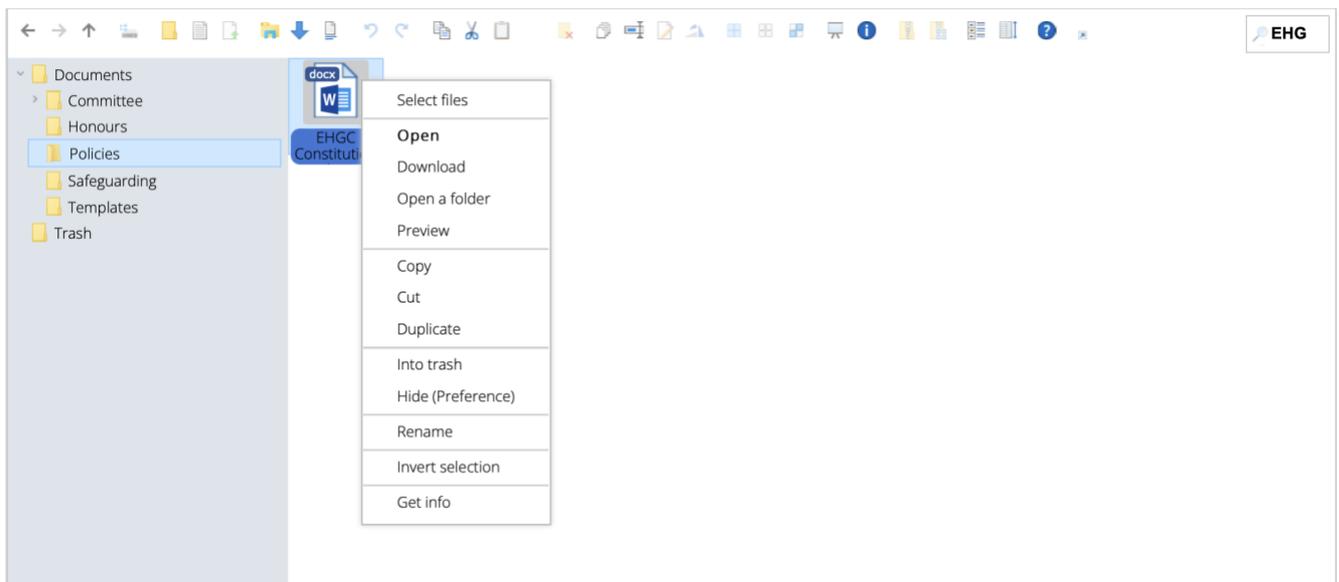
Just choose 'download' in this menu to save a copy of the file on your local PC or Mac. This will be the file that you now edit to your hearts content.

The document is now 'checked out'.

4.2.3. Edit the Document

In this step the repository itself plays no part. You only use Word or Excel (or whatever) locally to change the copy you have created. Modify it however you like, but bear in mind that to avoid unnecessary check-in/check-out cycles it is best to be absolutely sure all changes are finished. It maybe that a review cycle with other committee members is required, and it is best to complete this and any subsequent changes before checking the document back in.

Basically, aim for completeness and stability before checking back in.

4.2.4. Check In a Document

Have the updated document you want to check in visible in a directory viewer and also have the Document Repository window open. You will find that you can just drag and drop a file from its local directory to the document repository, but this isn't so easy to screen capture. So here is the slower (but still quick) way of doing it:

First, right-click in a blank area of the Document Repository screen and you will see a slightly different context menu than if you right-click over a file:
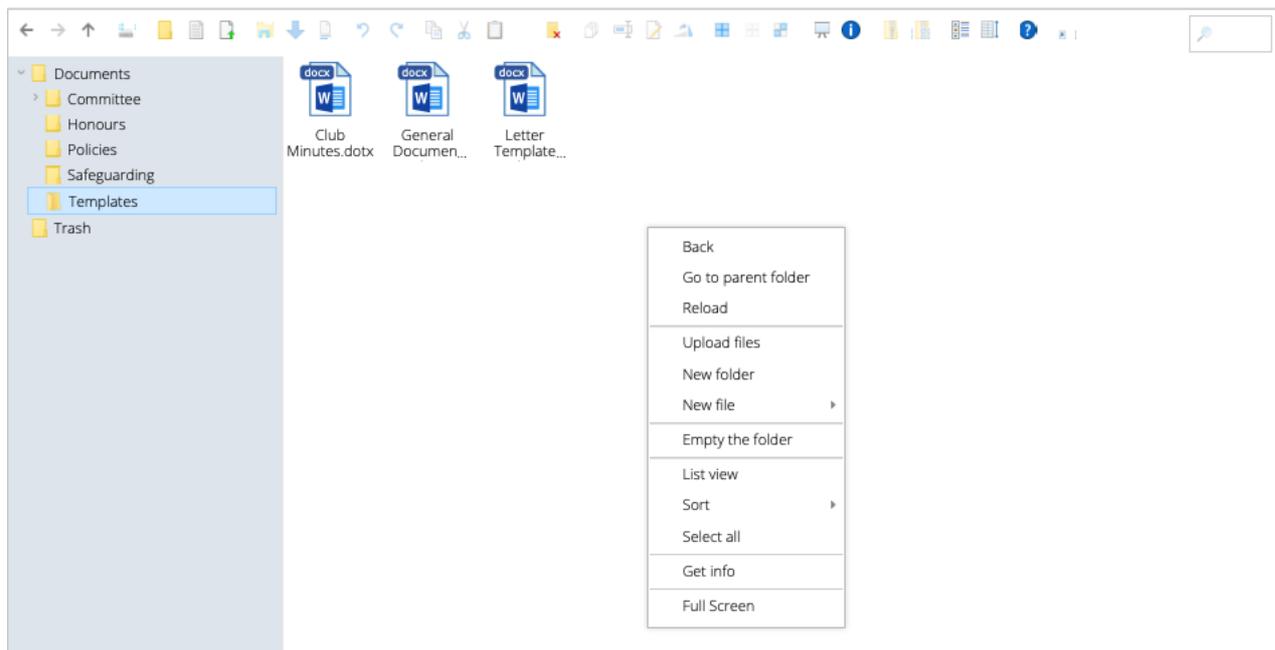
Figure 16 Context menu with no file selected

In the menu you will see the option 'Upload files'. Select this option and the screen will change to show a file selection dialogue box:
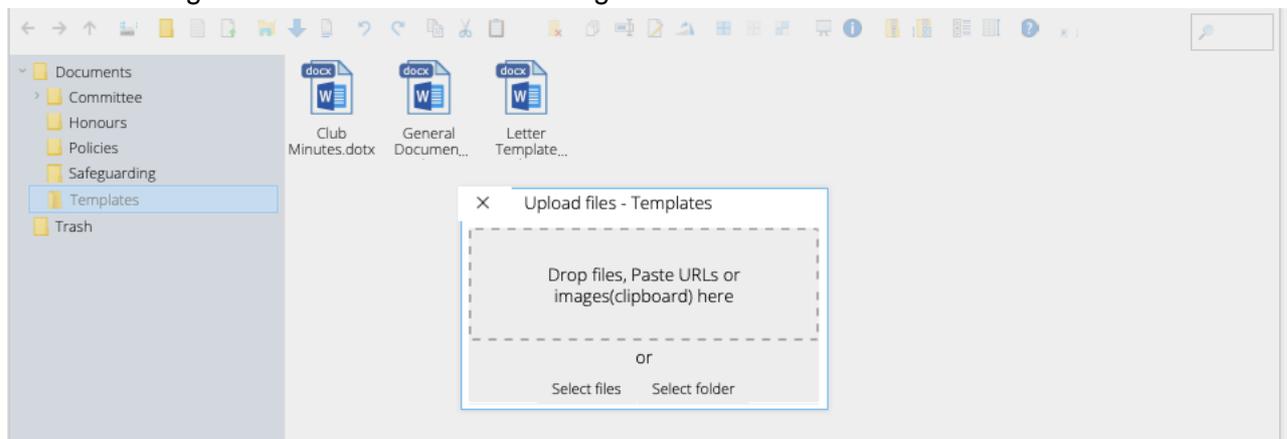

Figure 15 File selection dialogue for Upload

Note that you have the option of now dragging the file on top of this dialogue box, or you can choose the select files option. The latter gives you a directory viewer on your PC to select the file you want to upload. Using either option to select the file to upload then causes an 'actions' dialogue box to be displayed as shown in the next screenshot:
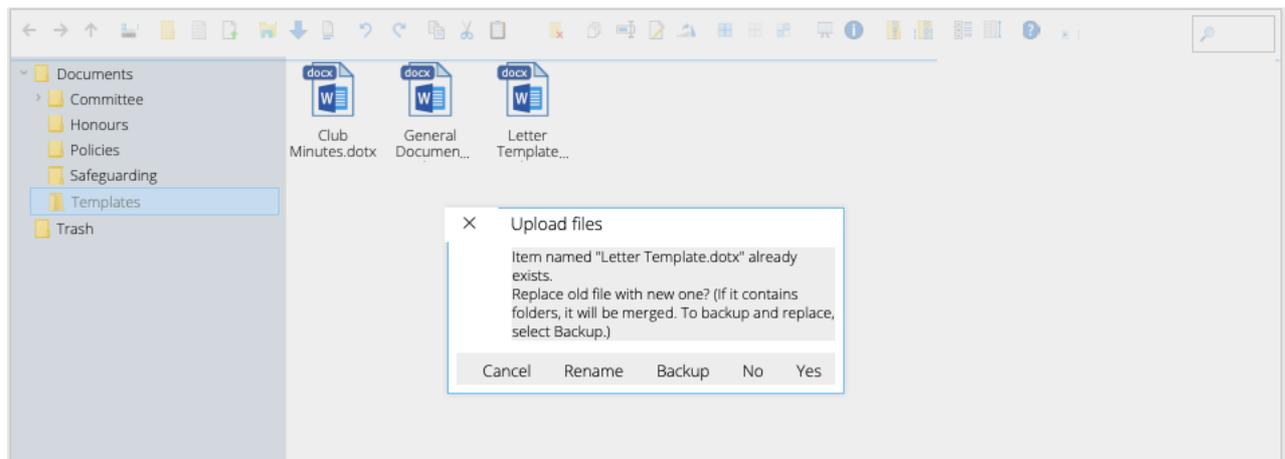
Figure 17 Options Available when Checking In

So, which of these should be used? First a brief summary of what each will do using the example above:

Cancel Do not check in the updated file

Rename Automatically rename the file: The new file becomes 'Letter Template-1.dotx', while the original file is still retained using the original name.

Backup The old file is renamed: 'Letter Template.dotx' is renamed to 'Letter Template~.dotx', while the updated file becomes 'Letter Template.dotx'. If 'Letter Template~.dotx' already exists then 'Letter Template~1.dotx' is created and so on.

No Do not check in the updated file

Yes Just overwrite the file in the document repository with the new one.

For safety reasons, it is probably wise to retain a copy of the original file. So at least for initial usage make sure you choose the 'Backup' option. That way we will all know that any file with a '~' in its name is an original unmodified file that could be returned to if any problems arise with the updated version.

This backup function is also the second step in mitigating against two people updating the same document at the same time, because we always have all the updated copies available.