

East Kentucky Workshop

Thank you for joining us this afternoon for our workshop. This handout has been created for you to reference after today's session. If you ever have questions while working on your site, please reach out to the CWB team at coopwebbuilder@touchstone.nreca.coop. Additional resources are also available at <https://www.coopwebbuilder3.com>.

1. Logging In

To begin using your Co-Op Administrator Permissions, you will first need to log in to your site. You will be able to log in using yourwebsitedomain/user/login. When on the correct page, you will see the screen below:

Username *

Enter your Touchstone Energy Cooperative, Inc username.

Password *

Enter the password that accompanies your username.

▼ CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Math question *

3 + 5 =

Solve this simple math problem and enter the result. E.g. for 1+3, enter 4.

Log in

Log-in using your username and password that were set up when creating your account.

!! Stuck?

If you are having trouble logging in, you can always reset your password. When clicking this option, instructions will be sent to your email address. If you are still having issues or did not receive an email, reach out to the CWB team and we can manually reset your password.

[Log in](#)[Reset your password](#) 

Username *

Enter your Touchstone Energy Cooperative, Inc username.

Password *

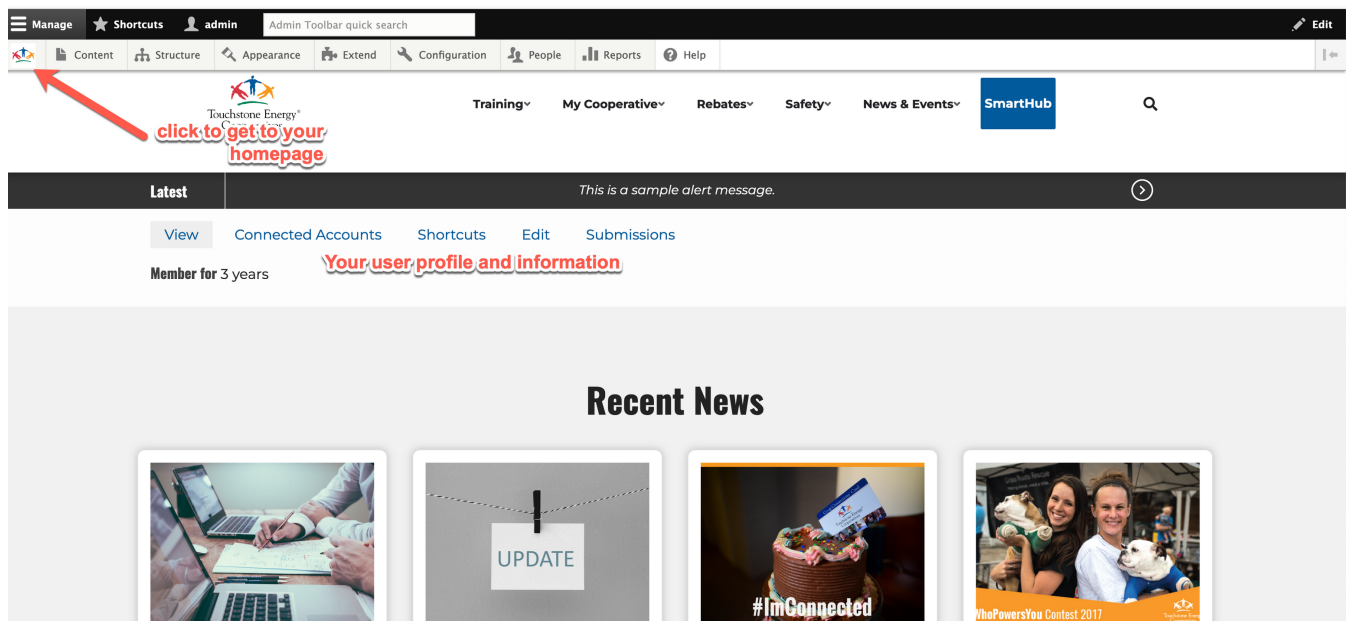
Enter the password that accompanies your username.

2. Your User Page

Once logged in to your site, the first page you land on will be you "User Page." This will allow you to see:

- How long your account has been active
- Shortcuts you created
- Submissions you have made for webforms

In most cases, you will not be doing much on this actual page. You probably want to go to your homepage, which you can do by clicking your site's logo in the left corner of your admin toolbar.



Manage Shortcuts admin Admin Toolbar quick search Edit

Content Structure Appearance Extend Configuration People Reports Help





Training My Cooperative Rebates Safety News & Events SmartHub

Latest This is a sample alert message.

View Connected Accounts Shortcuts Edit Submissions

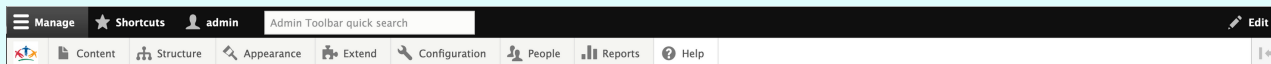
Member for 3 years **Your user profile and information**

Recent News

- 
- 
- 
- 

3. Drupal Admin Toolbar

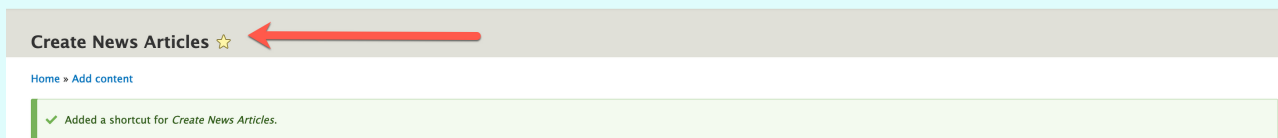
Now that you went through the work of logging in, you can make the most of your "Co-Op Admin" privileges by using the admin toolbar. This will be your best friend when navigating your website. You can use the toolbar to make almost any change that is needed. There are three main sections to be familiar with: **Manage, Shortcuts, and Admin.**



Manage: This is the main section you will be using and loads on default. This is where you can create new content, access the structure of your homepage and individual pages, change appearance settings, such as your color scheme, and more.



Shortcuts: One cool feature of our platform is the ability to add shortcuts to pages. Maybe you frequently edit your homepage slideshow and want quick access to the edit page. Add a shortcut and save yourself some time! Any editing page can be added to your Shortcuts by pressing the star icon, as seen below.

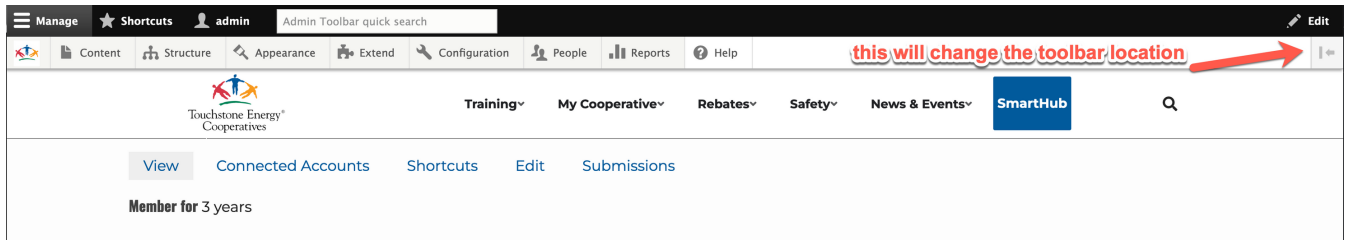


Admin: You can use the admin section to log out or view your profile.

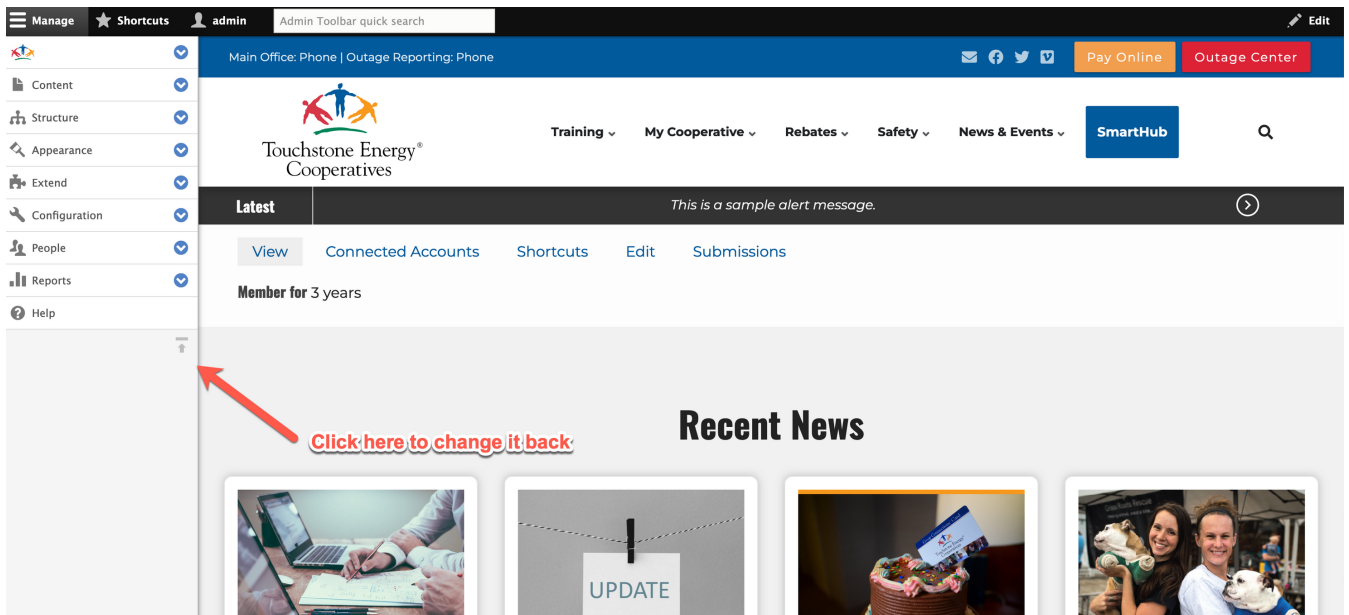
Pro Tip

Maybe you would prefer to have the toolbar to the side of your screen (like it is in WordPress)

as opposed to across the top. Well good news-- you can change the location of your toolbar by clicking the button on the top right of your screen:

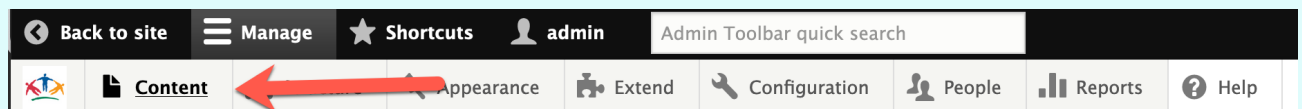


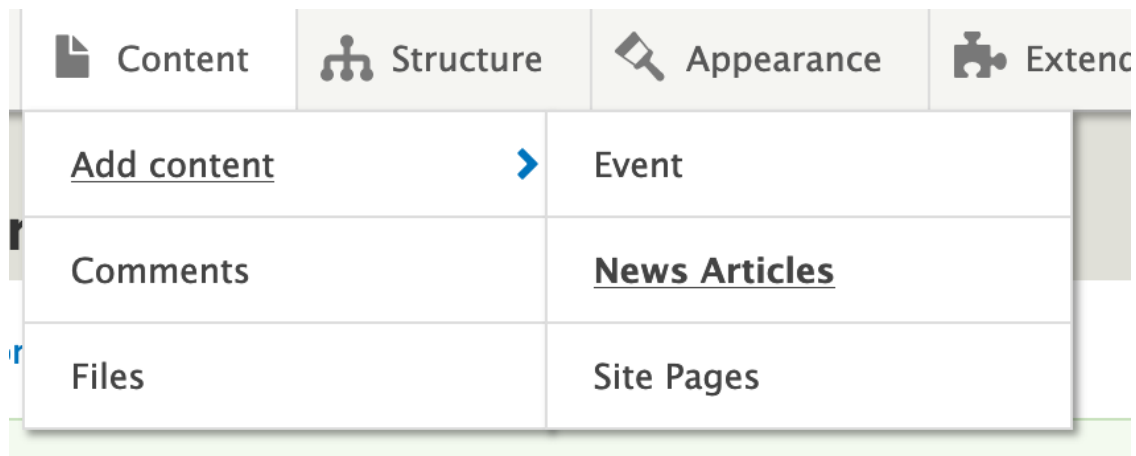
Now your admin toolbar looks like this!



4. Content

Anytime you want to create a new page or post a news update or event, that would fall under the category of content. You can see the different content types your site offers under Manage → Content → Add Content in your admin toolbar. The Content menu also lets you view comments (if your site uses them) and your website's files.





It is good to be familiar with your different content types.

Site Pages: Any time you want to create a page with information that will stay on your website will be a site page. Every page you access via your site's main navigation is likely under the Site Pages category.

News Articles: When you post stories, blog posts, or timely updates, these would fall under the category of New Articles.

!! It is important that you keep your Site Pages and News Articles separate. For example, if you want to create a feed of your news, we would filter it by content type. You would not want a news feed populating your Site Pages along with your news articles.

Event: Some cooperatives like to add events, which populate on an upcoming calendar. If this is something your cooperative uses, adding an event will display the correct information to the calendar.

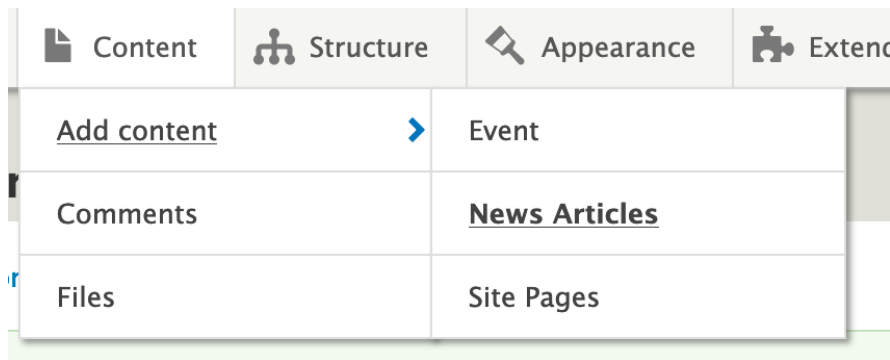
Depending when your site was created, your content types may be named differently.

If you see **Articles:** this is the older version of "Site Pages"

If you see **News:** this is the same as News Articles

5. Adding Content

Now that we're familiar with different content types, we can start posting! Under content, go to add content, and select the type of post you want to make:



Clicking on the content type will take you to the editor for that specific content type.

For our example, let's look at the News Article editor. The Create page will tell you exactly what information is needed to make a post. Red asterisk indicate a required field. The body section is where you can add your main content, this will be text, images, or whatever else you may want to add. Later, we will go over an alternative workflow.

Create News Articles ☆


[Home](#) > [Add content](#)

Title *

DATE PUBLISHED *

Please enter the date that you would like this story to appear published on.

Card Image



[Open File Browser](#)
 No file selected.

One file only.
100 MB limit.
Allowed types: png gif jpg jpeg.
Images larger than 2560x2560 pixels will be resized.

Last saved: Not saved yet
Author: admin
Revision log message

Briefly describe the changes you have made.

▶ MENU SETTINGS

▶ METATAGS

▶ SIMPLE XML SITEMAP

▶ URL ALIAS

▶ AUTHORING INFORMATION

▶ PROMOTION OPTIONS

▼ IN-PAGE IMAGE(S)

Add a new file

[Open File Browser](#)
 No files selected.
















Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: png gif jpg jpeg.
Images larger than 2400x2400 pixels will be resized.

Images larger than 2000x1000 pixels will be resized.











Card Teaser *

Provide a teaser or quick summary of your post. This copy will display on the card display in your news feed for this post.

Body [\(Edit summary\)](#)

B*I*U~~S~~^{x²}_{x₂}*T_x* Ω 

Format



Styles

A

A

Text format

Full HTML

[About text formats](#)


Tags

Enter a comma-separated list. For example: Amsterdam, Mexico City, "Cleveland, Ohio"

ATTACHMENTS

Provide file attachments for this post, so your viewers can download them without having to make links.

Add a new file

 [Open File Browser](#)

Browse...

No files selected.

Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: txt pdf doc docx xls xlsx jpg png.

Paragraph Blocks

No Paragraph added yet.

Paragraph type

50/50 Hero & Simple Text

Add Paragraph

 to Paragraph Blocks

☒ Published

Save

Preview

Of course, when you are finished creating a post, you will need to save it. If you want to schedule it for a later date, you can always uncheck the "Published" box.

!! Menu Links: Want to add a page to your menu while you are creating it? You can do that by clicking the menu settings to the right side of the page.

▼ MENU SETTINGS

☒ Provide a menu link

Menu link title

name of the page as it will appear on the menu

Description

Shown when hovering over the menu link.

Parent item

<Main navigation>

section on menu it will go under

Weight

0

Menu links with lower weights are displayed before links with higher weights.

▶ METATAGS

▶ SIMPLE XML SITEMAP

▶ URL ALIAS

▶ AUTHORING INFORMATION

▶ PROMOTION OPTIONS

Once the post is published, the menu link will be added along with it.

6. Editing Content

There are a couple of different ways to edit content. On older themes, there is usually a bit of navigation needed. However, with the newest **Gravity Theme**, you have access to quick editing tools. This is an incredible new feature and one of the big reasons switching to Gravity is a great idea.

Your first option for editing is to click the edit button on the page you would like to change. This will give you access to the body, where you can change the content. You can also change the menu link, title, etc.

View Edit Delete Revisions

Healthy Savings Discounts

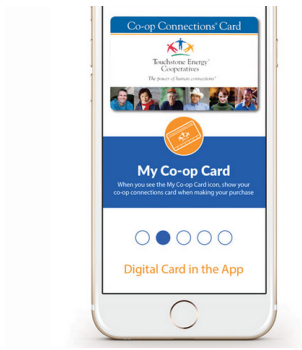
Touchstone Energy® Cooperatives' Co-op Connections® Program

prescription discount offer is now joined by discounts

these great benefits for FREE!

Save on hundreds of local and national discounts - pharmacy savings, online offers, discounts on events, online cash back shopping and more. Members can get their co-op discounts by

This edit button takes you back to the create screen where you can edit the body



shopping online through connections.coop, the Co-op Connections mobile app, or by using the card. Get your card by requesting it from the Co-op.

HEALTHY SAVINGS

Pharmacy, dental, vision, diabetic, hearing aids, chiropractic, lab testing, and MRI & CT scans.

HOTEL SAVINGS

Save an average of 20% at over 400,000 locations worldwide.

CASH BACK SHOPPING



Earn up to 20% cash back when you shop at over 2,000 online

With Gravity, you also have access to the quick edit tools by clicking the pencil icon to the right of the screen (seen below).

[View](#) [Edit](#) [Delete](#) [Revisions](#)

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get these great benefits for FREE!



Save on hundreds of local and national discounts - pharmacy savings, online offers, discounts on events, online cash back shopping and more. Members can get their co-op discounts by

[Quick edit](#)
[Edit](#)
[Delete](#)

"Quick edit" will allow you make changes directly on the page. This is great if you are looking to make changes that you are able to see.

Body → Co-op Connections Sa... ×

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!

Perhaps you aren't looking to change the content of the page, but rather change the layout or add a special feature. In these cases, you would use the bar at the bottom of the screen.

REGION: HEADER

REGION: COLUMN1

REGION: COLUMN2

REGION: MIDDLE

BLOCK: BODY

× ^ ↓ MOVE ⚙

Healthy Savings Discounts

Touchstone Energy® Cooperatives' Co-op Connections® Program helps you save more and live healthier every day! Our highly successful prescription discount offer is now joined by discounts on dental, vision, hearing, lab work & imaging and chiropractor visits. Best of all, you get all these great benefits for FREE!

BLOCK: PARAGRAPH BLOCKS

× ^ ↓ MOVE ⚙

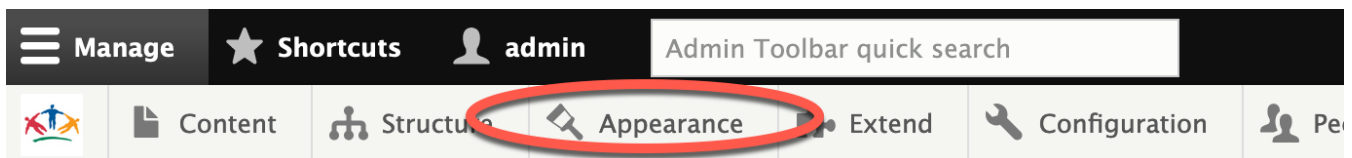


Change Layout: change the look of your current page

Manage Content: add additional content to your page, such as media cards, accordions, etc.

Edit: Rearrange where each component will be displayed on your page.

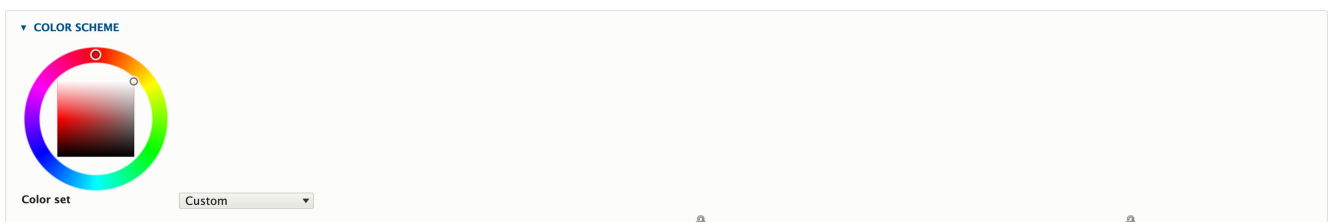
7. Your Site's Appearance



Clicking on the appearance tab of your admin toolbar allows you to customize how different elements are display **across your website**.

!! Individual Page Changes: If you want to change the color or appearance of an element on a single page instead of the whole website, we need to update your site's CSS code. In these situations, it is best to reach out to our team so we can make the change for you.

The below screen will give descriptions for each element you have control over. Click on an element you want to change and then use the color wheel to pick the new appearance. You can also type in a hexagon code using your co-op's current branding.

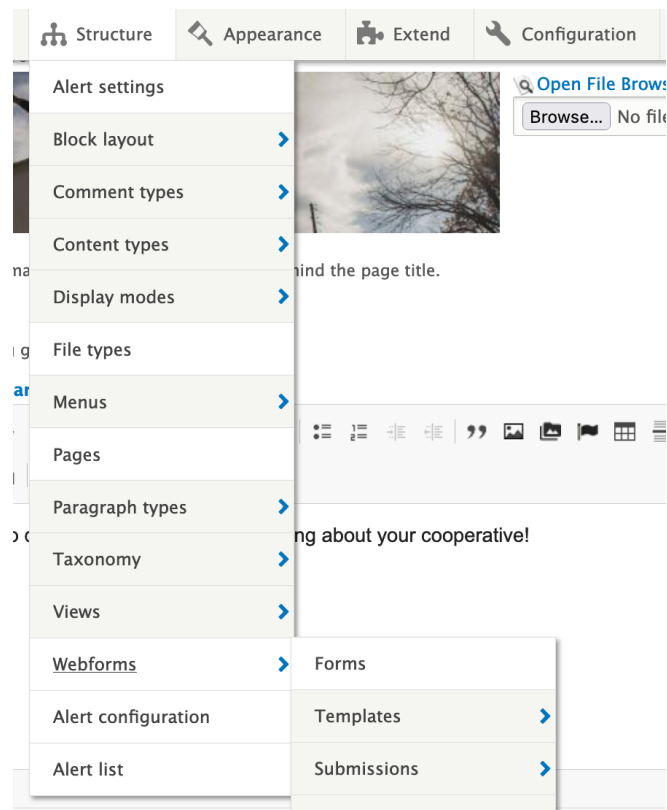


Main Background	#f0f0f0	Header Background Top Gradient	#ffffff	Header Background Bottom Gradient	#ffffff
Slideout Menu Button	#444444	Slideshow Overlay Color 1	#eeeeee	Slideshow Overlay Color 2	#018fe2
Bill Pay Embed Background	#ffffff	Button Color	#005a9c	Button Hover Color	#018fe2
Link	#005a9c	Link Hover	#018fe2	Logo Background Color	#ffffff
News Card Bottom Border	#018fe2	Media Card Top Border	#005a9c	Sidebar Background	#f6f6f2
Slideout Region	#ededed	Text Color	#222222	Title & Site Slogan	#111111
Back to Top Icon	#018fe2	Footer Bottom Background	#005a9c	Social Media Icons	#ffffff
Base Color	#005a9c	Dark Color	#01355b	Accent Color	#018fe2
Footer Main Background	#005a9c	Main Menu Hover Color	#018fe2	Paragraph Primary	#008851
Paragraph Secondary	#005432	Paragraph Success	#83d073	Paragraph Info	#005baa
Paragraph Warning	#e19920	Paragraph Danger	#ed1b24		

8. Webforms

Webforms are a great function for your sites. They allow users to submit information to you securely. Webforms can be used for scholarship applications, general contact, employment, and more.

To see your site's webforms, go to Structure → Webforms → Forms in your admin toolbar.



To add sections to your webform, you will want to be in "build mode."



Creating Links: If you need to add a link to a page or block, you can do so by clicking the link icon.



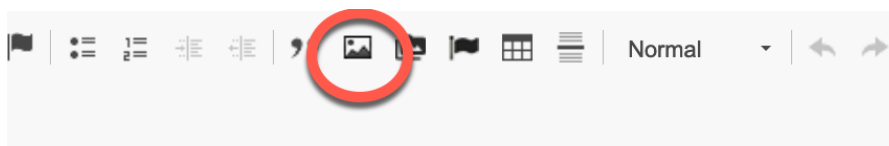
Use this page to describe everything and anything about your cooperative!

Highlight the text you want to turn into a link, click the button and enter your desired link into the following box:

A screenshot of a dialog box titled "Add Link" with a close button (X) in the top right corner. The dialog has a "URL" section with a magnifying glass icon and a text input field containing "Open File Browser". Below this is a text prompt "Start typing to find content." and a "Title" section with a text input field. A descriptive text below the title field reads: "Populates the title attribute of the link, usually shown as a small tooltip on hover." There is a button labeled "► ADVANCED" and a "Save" button at the bottom.

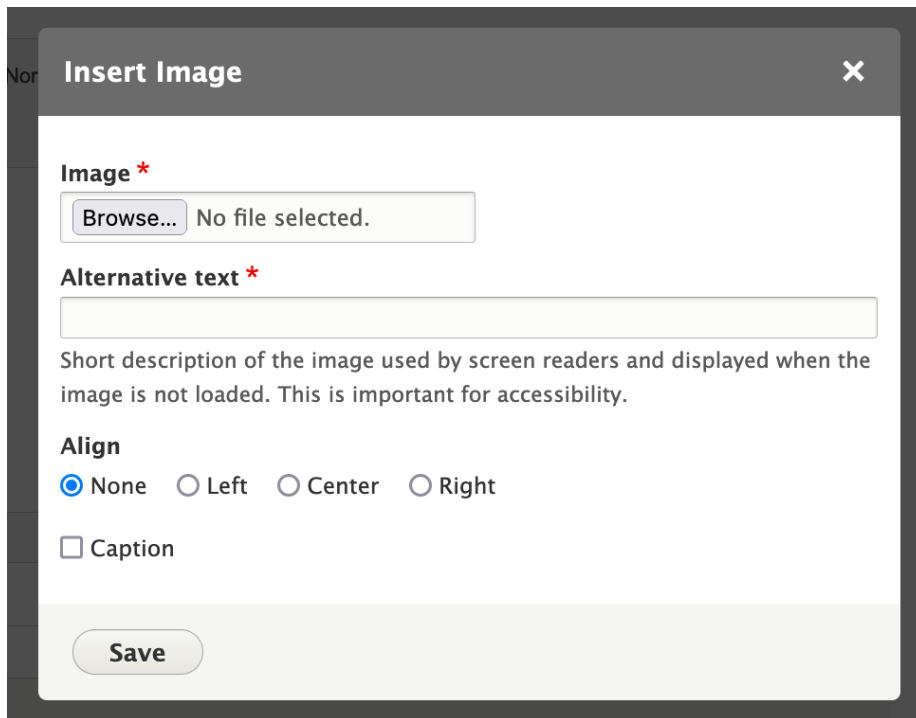
Notice that you can type in a URL or also select a file from your file browser to use.

Images: You can upload images directly to the content you are working on using the tool below:



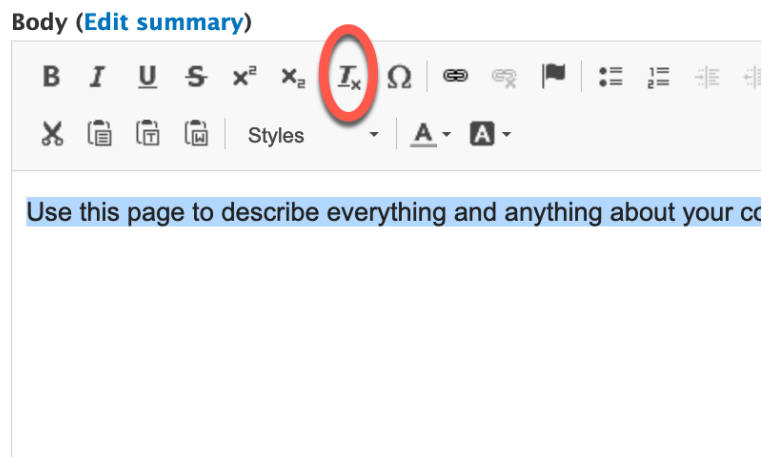
thing about your cooperative!

Once clicking on the tool, you can upload an image in the below screen. When adding alternative text, you want to describe what is happening in the image. This is what gets for users on a screen reader, so it is important to be descriptive for accessibility.



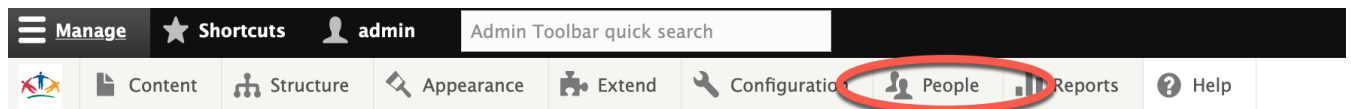
The image shows a dialog box titled "Insert Image" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Image *" with a "Browse..." button and the text "No file selected.". Below this is a section labeled "Alternative text *" with a text input field. Under the input field, there is a short description: "Short description of the image used by screen readers and displayed when the image is not loaded. This is important for accessibility.". Below the description is an "Align" section with four radio buttons: "None" (selected), "Left", "Center", and "Right". There is also a checkbox labeled "Caption" which is currently unchecked. At the bottom of the dialog is a "Save" button.

Remove Formatting: It is common practice to write your content in Microsoft Word or Google Docs prior to posting on your website. However, sometimes this gives text formatting that we don't want to keep, impacting the look of the text. In our Text Editor, you can remove previous formatting by using the tool below:



!! Be Careful With Your Files: Your website has two different file directories, Public and Private. If a Public File is linked on your site, any users will be able to see it. If a Private File is linked, only logged-in users will be able to see it. If you are designing a webpage that is intended for the public, it is important that you only link to Public Files. Otherwise, that particular link will not work for a public user.

10. People



The people tab of your admin toolbar is where you can create new users for your site. As the Co-Op Admin, you have the power to add new users.

The Role of a user is what determines their site privileges. If you want a role created that limits site access, please let the CWB team know.

Add user ☆

[Home](#) » [Administration](#) » [People](#)

This web page allows administrators to register new users. Users' email addresses and usernames must be unique.

Roles

☒ Authenticated user
☐ Administrator
☐ CO-OP Admin

Email address

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Username *

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password *

Confirm password *

Passwords match:

Provide a password for the new account in both fields.

Status

☐ Blocked
☒ Active

☐ Notify user of new account

POLICY	STATUS
CWB Password Policy	Fail - Password length must be at least 15 characters.
CWB Password Policy	Fail - New role was added or existing password policy changed. Please update your password.
CWB Password Policy	Fail - Password must contain at least 3 types of characters from the following character types: lowercase letters, uppercase letters, digits, special characters.
CWB Password Policy	Fail - New role was added or existing password policy changed. Please update your password.
CWB Password Policy	Fail - New role was added or existing password policy changed. Please update your password.

Site language

English ▾

This account's preferred language for emails. This is also assumed to be the primary language of this account's profile information.

Determine the role the new user has

Email of new user

Username is what will be used for log in

You will check this box to send an email to the new user

☐ Password Expiration

Control whether the user must reset their password. If the password has expired, this field is automatically checked after the execution of Cron.

LAST PASSWORD RESET

02 / 14 / 2023 01 : 32 : 44 PM

URL alias

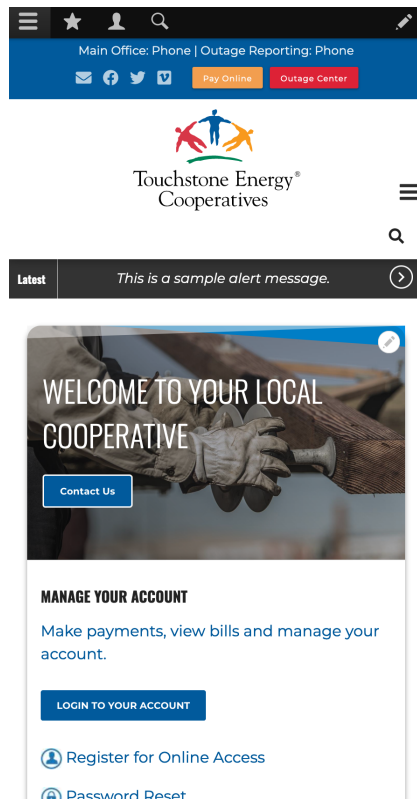
Specify an alternative path by which this data can be accessed. For example, type "/about" when writing an about page.

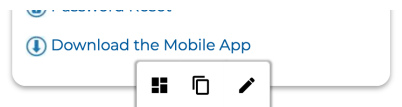
Create new account

Administrator vs. Co-Op Admin: Please never assign the "Adminiistrator" role to someone within your co-op. This role is used for the CWB team ONLY. If someone in your organization is given this role, they will not be able to access your site. If you want to give someone full permissions to edit the site, they would be a "CO-OP Admin."

11. Mobile

Since many users will be visiting your website from their mobile devices, it is important to be aware of your mobile site's appearance. While on a desktop, you can resize your browser window and zoom to 125% to get a good view. By resizing the window into the below shape, this is the view you get:





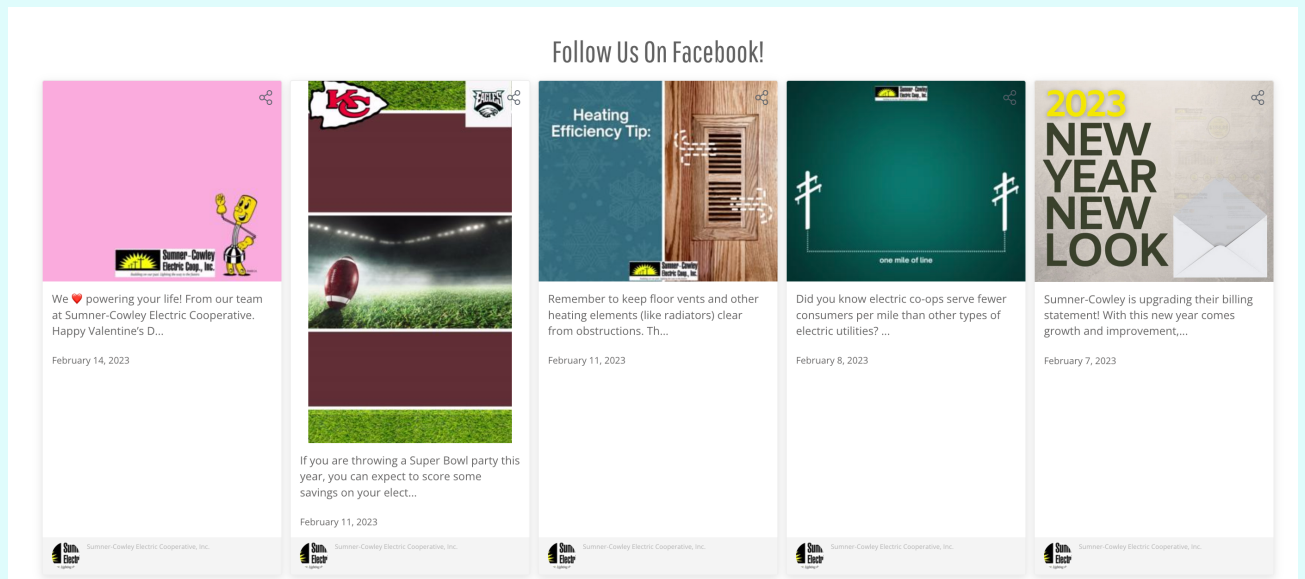
Our website themes are designed to be mobile friendly, so if something is working on desktop, it should be working on mobile as well. If you notice anything is not functioning correctly, please reach out to the CWB team.

If you prefer to work on mobile, you can also access your admin toolbar on a tablet or mobile device and make edits that way.

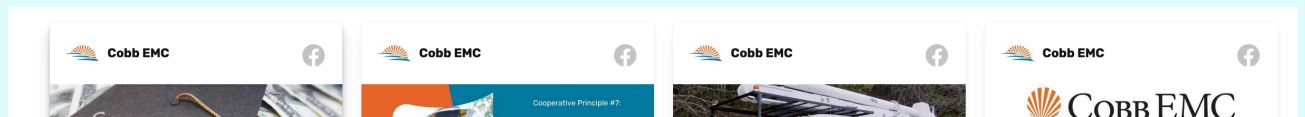
12. Social Media Feeds

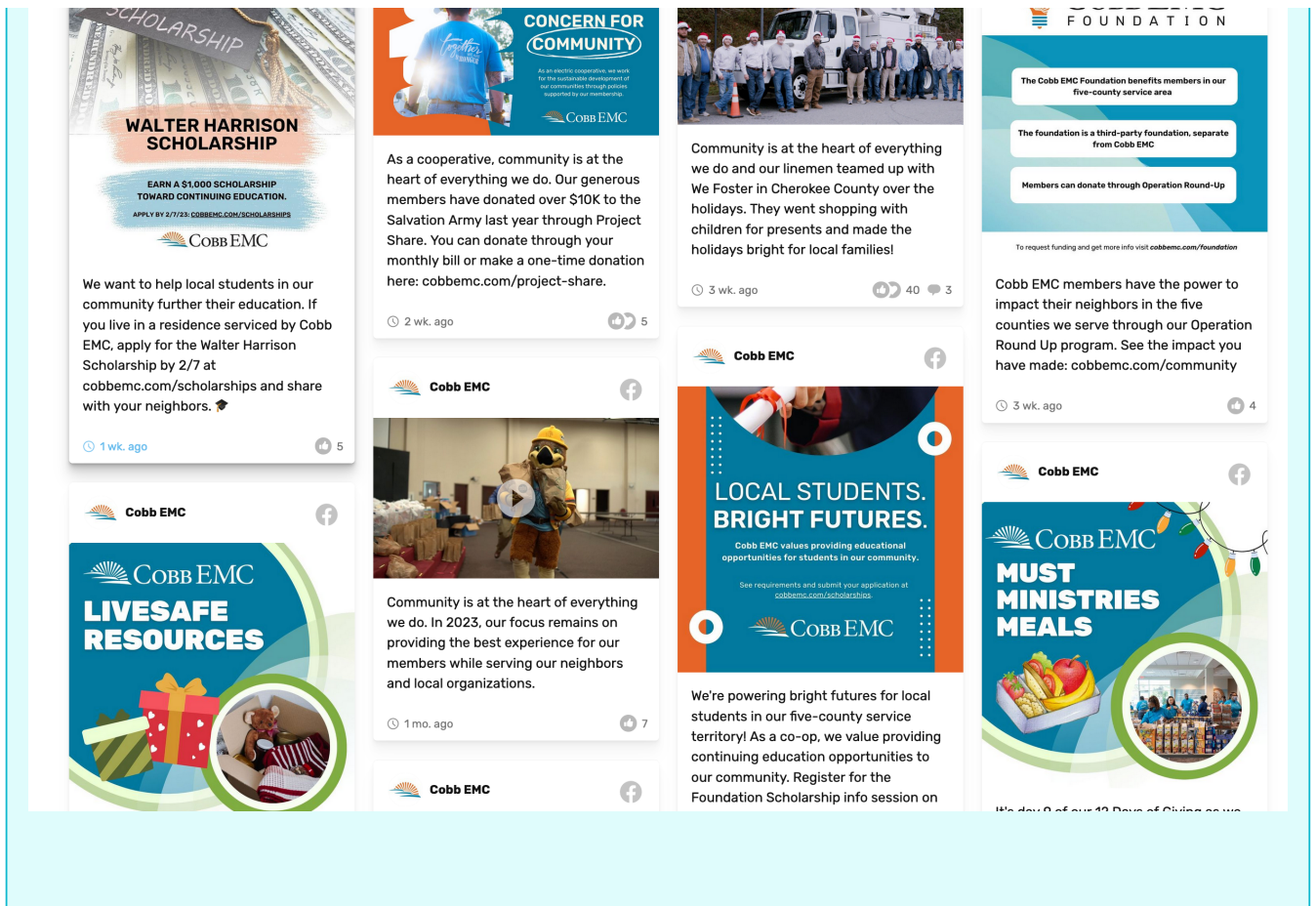
Connecting your social media content to your website is a great way to ensure your site has content being posted regularly. We suggest two platforms that can make this easy:

POWR: "In just a few clicks you can get started for free and have access to a whole library of plugins that will work on any website-building platform and on any device. Feel like a professional web designer, with zero code, zero hassle, all while getting the best for your business."



Elf Sight: "Elfsight widgets help 1,000,000+ website owners to increase sales, engage visitors, collect leads and more. Save your time and money with ready-to-use solutions and grow your business faster!"





13. Metatags

Metatags control the way your content displays when shared to a social media site. You can access the Metatags section on the right hand side of any page you are editing. Look through the Basic Tags and make sure that everything is set up the way you would like. The Advanced Settings are available to you as well. Each section also describes the functionality, so be sure to read through these if trying to make a fix. Please reach out to the CWB team if you have any questions while setting up Metatags.

▼ METATAGS

Configure the meta tags below.

Use tokens to avoid redundant meta data and search engine penalization. For example, a 'keyword' value of "example" will be shown on all content using this configuration, whereas using the [node:field_keywords] automatically inserts the "keywords" values from the current entity (node, term, etc).

[Browse available tokens.](#)

▼ BASIC TAGS

Simple meta tags.

Page title

The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page, or as the page title in a search engine result. It is common to append '[site:name]' to the end of this, so the site's name is automatically added. It is recommended that the title is no greater than 55 – 65 characters long, including spaces.

Description

A brief and concise summary of the page's content that is a maximum of 160 characters in length. The description meta tag may be used by search engines to display a snippet about the page in search results.

Abstract

Touchstone Energy® Cooperative Inc. is a national network of electric cooperatives that provides resources and leverages partnerships to help member cooperatives and their employees better engage and serve their members. By working together, Touchstone Energy cooperatives stand as a source of power and information to their 30 million member-owners every day.

A brief and concise summary of the page's content, preferably 150 characters or less. Where as the description meta tag may be used by search engines to display a snippet about the page in search results, the abstract tag may be used to archive a summary about the page. This meta tag is *no longer* supported by major search engines.

Keywords

A comma-separated list of keywords about the page. This meta tag is *no longer* supported by most search engines.

!! Great Resources: There are a lot of free websites that allow you to post a link and preview how it looks on different social platforms. This is a key tool in ensuring everything is set up the way you would like.

We recommend: <https://www.opengraph.xyz/> and <https://socialsharepreview.com/>

14. Additional Best Practices

Here are some recommendations for organizing your work. These are not required, just our suggestions. Please use whatever workflow and practices are best for you.

!! Managing Files: As time goes on, your file manager will contain more and more content. Because of this, it is important to keep everything organized. It can get overwhelming if a system is not in place within the content manager.

We recommend naming folders and files with no spaces or special characters. Doing so can have a negative impact on the readability of your files and links.

It is also important to **be consistent** with your file naming structure!

!! Images: The larger an image file is, the longer it takes to load your content. Because of this, we recommend using JPG files and avoiding the use of PNG files. PNG files typically are about 20x the size of a JPG and their use is not usually necessary.

The only time we recommend using a PNG file is for your co-op's logo at the top of the page.

If you need a tool for resizing images, we suggest <https://pixlr.com>. This free platform gives you most of the functionality of Photoshop. You can also save images to 50%

quality, which will lower your file size. The changes made are not noticeable.
<https://pixlr.com/x/>

15. Google Analytics 4

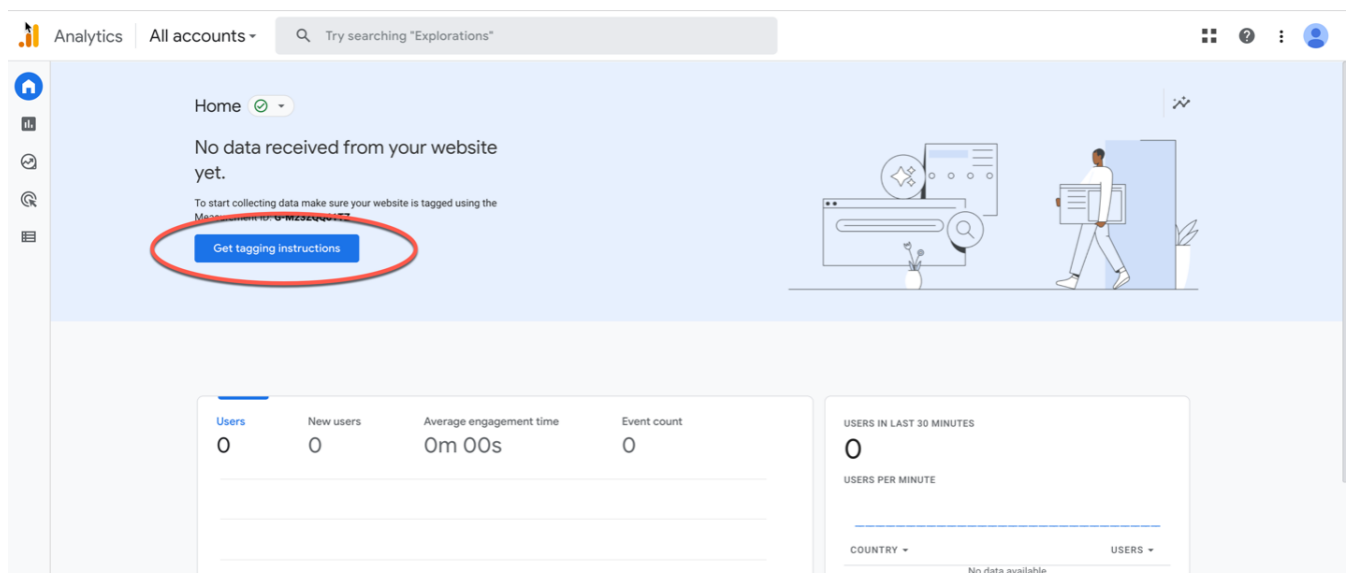
Google Analytics allows you to collect data from your Co-Op Web Builder site, giving you reports and insight about your business. Google has released their newest version of this tool, Google Analytics 4 (GA4). The CWB Team will be helping you upgrade. By July 2023 earlier GA tracking numbers will not be supported. If you are using GA, we recommend making these changes ASAP.

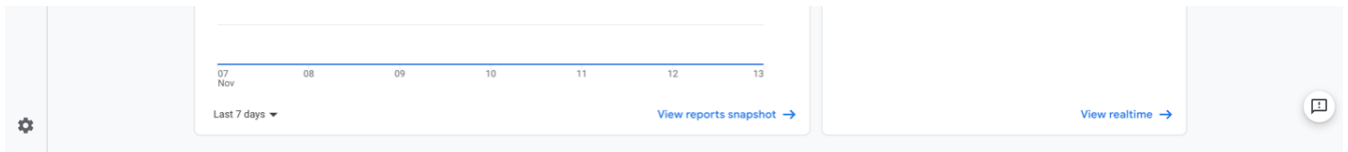
If you are using an older version of Google Analytics (or If you are just getting started), please follow this step-by-step guide from Google on making sure everything is up to date: <https://support.google.com/analytics/answer/9744165#zippy=%2Cin-this-article>

Once you have set up and upgraded your GA account, use the following steps to add the tracking information to your co-op site.

Step 1: Log In To Your Google Analytics Account

Step 2: Once logged in, you should see a message about tagging instructions. Click on the button.





Step 3: Locate your "Measurement ID" this is the ID you will want to add to your site.

× Web stream details

⚠ Data collection isn't active for your website. If you installed tags more than 48 hours ago, make sure they are set up correctly. [View tag instructions](#)

Stream details			
STREAM NAME	STREAM URL	STREAM ID	MEASUREMENT ID
CWBDEVS	https://cwbdevs.com		G- [redacted]

Events

- Enhanced measurement**
Automatically measure interactions and content on your sites in addition to standard page view measurement. Data from on-page elements such as links and embedded videos may be collected with relevant events. You must ensure that no personally-identifiable information will be sent to Google. [Learn more](#) ☒
- Measuring: Page views Scrolls Outbound clicks + 4 more
- Modify events**
Modify incoming events and parameters. [Learn more](#) >
- Create custom events**
Create new events from existing events. [Learn more](#) >
- Measurement Protocol API secrets**
Create an API secret to enable additional events to be sent into this stream through the Measurement Protocol. [Learn more](#) >

Google tag

- Configure tag settings**
Configure your Google tag behavior, including cross-domain linking and internal traffic. [Learn more](#) >
- Manage connected site tags** 0 connected >

Step 4: Copy the Measurement ID and then open a new tab with your website.

Step 5: Within your admin toolbar, go to Configuration -> Web Services -> Google Analytics.

Step 6: Paste the new Measurement ID where it says Web Property IDs. (Note: the older tracking numbers with UA-# format will no longer be supported July 2023. Replace this number with your new Measurement ID, which has G-# formatting.)

Step 7: Go to the bottom of the page, Save Configuration, and then you're finished!