



User Documentation

Welcome to your new website using Open Outreach for Drupal 7

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Using the admin menu toolbar

- As a site administrator (when you are logged with with administrator permissions) you will see a black toolbar at the top of the website. This is a handy tool for easily navigating to the areas you may need to access for site configuration and other administrative tasks.
- Clicking on the top level (e.g., Structure, Appearance, People) will take you to the administration page for that section. So you can click on the Structure button and go to a page where you can select the appropriate tool within this section, for example content types or menus.
- The tool bar also has dropdown menu functionality, so you can also navigate directly by hovering over the main button and navigating directly to a subsection or even an item within that (for example to add a block by hovering over the Structure button, and then Blocks, leading to an Add block link).
- You can also navigate to the administrative sections of your website by entering the complete address, e.g., <http://websitename/admin/structure/block>.

Login/logout

- Log in using your user name and password. If ever you do not have the user log in block enabled, simply enter the website address as <http://websitename/user> and you will get to the log in box.
- If you ever forget your password, you can have a new one-time login password emailed to you. Use it to log in and then re-set your password *immediately*. *Note: it is very important that you are not already logged in or you will be prompted for your old password which you do not have. So when using this one-time log in do not do anything else on the site before setting your password.*
- To logout use the logout button in the login block (top of the sidebar on each page) or go to "my account" in the toolbox, and click "logout". Alternately, go <http://websitename/logout>

Roles and user accounts

A key reason for using a content management system such as Drupal is to spread out the work of adding content to your site. Ensure that all staff members or volunteers who are in a position to contribute to the site have an account set up for them and are assigned the appropriate role for the tasks they will be carrying out on the site.

Adding a new user account

- Start by logging in using the administrator (admin) account.
- There is a CAPTCHA (in this case a math question) to prevent machines logging in.
- Once logged in, with the administrator role, you will see a toolbar at the top of the page.
- Select the "People" link.

- For administration duties such as adding new users, you want to use this admin account. But for day to day use of the site such as adding and editing content, it is good to set up another account for yourself with your own username.
- Start by clicking the button "Add user".
- Type in a user name (this will appear in certain places, such as as the author of content) as well as an email and a password. Note that the email address you used to create the admin account cannot be used again—each email address may only be used for one user account.
- The next step is to assign this new user to a role. Roles determine what permissions a particular user has (that is what they are allowed to do on the site.)

Roles

Depending on the features enabled, there are the following roles enabled on an Open Outreach site:

- Anonymous user: A site visitor who has not logged in (*Exists by default*).
- Authenticated user: Anyone who has registered on the site, and authenticated herself/himself by logging in. (*Exists by default*).
- CRM viewer: A user who can view the contents of the RedHen CRM. *Usually a staff member as this is an internal, private database.*
- CRM manager: A user who can add and edit records to the RedHen CRM. *Usually a staff member as this is an internal, private database.*
- Blogger: A user who has permission to post blog posts.
- Member: A member who can view member only content.
- Member administrator: A user who has permissions to administer member only content.
- Contributor: A contributor is a member of staff or a volunteer who is going to be posting content but not editing other people's content.
- Editor: The editor can post content but also edit other people's content.
- Administrator: The administrator has all permissions.

When you have assigned a role, save your information.

Getting going with your new site

There is very little initial configuration that is required with your new Open Outreach site. The following configuration is recommended:

- You should start by clicking the Configuration button in the toolbar, and selecting the Site information section. Here you can configure the site name, slogan, and site email address.
- If you did not do so during the install process, ensure that you have a default country selected. Under configuration, choose Regional settings. If no default country is set, the calendars will often be off by one day. Even if you set this during install, it is advisable to visit this page and re-save your settings to ensure proper calendar functioning.
- Also on the Configuration page, select Date and time, where you can change the

display of the time settings as you wish for either AM/PM for 24 hour clock. Even if you are satisfied with the time/date displays, click the save button to ensure that correct displays for the calendar view.

- Configure any Follow links for your site. On the Configuration page, select Site follow links. Insert the URL for any service you want to show, "follow us on". Save your configuration.
- Service Links is initially configured to show Facebook and Twitter links on the bottom of various types of content so users can easily share on social media. If you wish to change these providers or add additional providers, go to the Configuration page and then click "Service Links". Under the "Services" tab, check the services you wish to use, and rearrange their order. Remember to save your configuration.
- If you are using the Debut Member feature, you will be prompted to Rebuild your content access permissions. Click the Rebuild permissions link.
- If you are using the Debut Location feature, you will likely want to configure the map zoom and centrepoint at Configuration/Regional and language/Debut Location map settings.
- **Important note:** For some releases of Open Outreach, the contact form was enabled during the install process but the appropriate permissions were not set. To check if this is working for you, visit your site as an anonymous user. If you are not seeing the contact form you need to update your permissions. The next step is to set the permissions (admin/people/permissions), usually so that both anonymous and authenticated user can access the site-wide contact form.
- Blocks (usually appearing in the sidebar) are set using the Context module. If you want to change the placement of any of these blocks you should read the section on working with blocks.
- Customize or delete the sample content (see below).
- Once your site is live, you should make sure that you turn off the display of error messages so that visitors to your site won't see them. They will still be logged so that you can see them if something does go wrong. To change this setting go to: admin/config/development/logging. Change the error messages to display to none.

Sample content

With 1.3 release (November 2013), Open Outreach now includes sample content. This will make it even easier for users new to Open Outreach and Drupal to get going with a new site. The sample content will give a visual snapshot of what your site will look like as it is populated, as well as providing pieces of content that can be edited to quickly get you started.

The sample content is generated using a filtered HTML text format. To get started you need to ensure that both the administrator and editor roles are granted permission to use the filtered HTML text format (sitename/admin/people/permissions). Otherwise you will be unable to edit the body field unless you are logged in as user 1 (usually the admin account.) This issue has been fixed as of release version 1.4 (January 2014) so those

permissions will already be set.

Depending on the features you have enabled, sample content includes:

- 2 highlighted images for the home page slideshow, with their kicker text and link.
- 2 each of articles and blog posts explaining what these content types do.
- An initial section "About" and its first sub-section (child page), Mission.
- An event, that will show as the creation date of your website.
- As of version 1.4 (January 2014), 8 location nodes, 4 with location type "City" and 4 with location type "UNESCO World Heritage Site".

You can use the sample content in two ways:

1. For the piece of content you want to use, select the edit tab and then replace the title, other fields, body text and image with your own, and save making it real content for your site. As noted above, the sample content is created using a filtered HTML text format. You can switch that to use a WYSIWYG (what you see is what you get) text editor by selecting the desired text format below the body field.
2. Or you can use them merely as examples, reviewing how they are formed based on their various fields and then unpublishing or deleting them and starting fresh.

Content will also provide links to the relevant sections of the Open Outreach documentation pages so that you read more about how to use various content types.

Creating new content

Selecting the appropriate content type

The first step in creating a new piece of content for your site, is deciding what content type is most suitable.

An Open Outreach website may include the following content types (depending on which features you have enabled):

Section: A section is a page of content, organized into a collection of related entries collectively known as a book. A section automatically displays links to sub-section pages, providing a simple navigation system for organizing nested sections of a site.

Blog: Use for posting personal journal-type entries, associated with the user who has posted.

Article: An article is ideal for creating and displaying content that informs or engages website visitors.

Highlighted: For displaying images and brief text that will be displayed on the home page.

Event: An event has a start date and time as well as an optional end date and time.

Link: A link content type for use in creating resource and other links.

Member Page: Page only visible to Members.

Forum topic: A forum *topic* starts a new discussion thread within a forum.

Location: For showing a geographic location on a map.

Book page: *Exists by default, as the basis for Section--do not use.*

It is helpful to pay attention to the content-type used for similar posts to ensure consistency. For example, many posts will be displayed based on the content type.

Each content type may have slightly different fields to be filled in but there will be many similarities.

Step-by-step instructions for adding content

Using the top of page toolbar, select "Add content" from the dropdown menu "Content". You will see a list of content types to select from. For example if you choose "article" you will get a form to fill in with the following elements:

Title: Give your post a title. *This is a required field.*

Image: Click the "select media" button to begin to add an image. To upload a new image, first browse for the image and then select the "submit button". The new image will be created as a new media file. If you want to use an image which has already been uploaded, click the "library" tab and then select an existing image and submit. Allowed image types are: png, gif, jpg and jpeg. The recommended image size is 640 by 480 pixels. Maximum size is 1000 x 1000 pixels. *The images that accompany posts are used in numerous displays so it is highly recommended that you include an image wherever possible.*

Tags: *Tags allow content to be sorted by terms that describe the content. Using tags on posts will provide website visitors alternate ways to locate content. Enter tags as a comma-separated list.*

Body: The body is where the content of your post will be placed. A text editor is installed to help with formatting. Different role types have access to different levels of input options for formatting. The default level "Wysiwyg public" allows bold, italics, a bulleted list and a way to add in a link. "Wysiwyg contributor" has additional options and "Wysiwyg editor" even more. You only have access to the level of formatting options to which your assigned role grants you access for security reasons.

Ideally text should not be pasted directly in from Word as it tends to create problems. If you have already word processed your content, copy it from your document and paste it in using the T button (paste as plain text) which gives you plain text to begin formatting. "Wysiwyg contributor" and "Wysiwyg editor" permissions also allow you to input media fields (image or video) directly into the body of your post.

Media: This allows you to add an unlimited number of media beneath your main content area. This includes images, video, audio or document files. As for inputting an image, you may browse and upload or select an already uploaded item from the library. Additionally, to use items from an external source, select the "web" tab and paste in the URL from a supported external source, e.g. Youtube.

Below the media fields, there are a number of other collapsed items which can all be opened to reveal further input options if you have the required level of permission. Most can just be left at their defaults for the particular content type which have been pre-configured for the most likely setting. But if you want to change any of those settings

you may do so. The most likely ones you may need to change would be:

- **Menu settings:** For most posts, you will not need to do anything under menu settings, but if for example you want an item to appear in the menu system, you can check the “provide menu link” box and configure the menu links. (More on menus below.)
- **Comment settings:** Can be changed from open to closed.
- **Publishing options:**
 - Published (is the default for all content types, means it will be immediately viewable—can be turned off for items that need moderation before they appear.)
 - Promoted to front page (this automatically moves promotes a piece of content to the home page, is the default for the article content type.)
 - Sticky at top of lists (makes the piece of content “stick” as the top piece of content. Only one piece can be so marked at the time. You will need to “unsticky” a piece of content before you “sticky” another one.

At the end of the form you may first preview your post to see how it will look or just go ahead and save.

Using the “section” content type to create the basic site structure

The section content type allows content to be nested within books and is the ideal way to structure your site for information that will remain somewhat stable. For example, you can use this content type to create sections that might be called “About Us”, “Programs” and “Services”. These top level sections can be given menu links so they appear on the home page. Then within each section, you can create subsections (called child pages). For example, under “About Us” you might have sections called “Mission”, “History” “Board”, “Staff”, etc. These subsections will all be part of the “book” “About Us”. You can also give them menu links, so that they become secondary links under the “About Us” menu. Spending some time and thought in organizing your required sections on paper before beginning is an important step.

To create a top level section, add new content of the type “section”, in the same way described above in the example of “article”. You will have the same fields except for “tags”. You will likely want to give your section a menu link so check the “Provide a menu link” box and fill in with the name you want to appear in the menu item. Most likely this will go in the Main menu, which is the primary navigation menu for your site. It is the “Book outline” that will order how your sections are nested. Select “create a new book” to make this section the top level.

To add another level, from within that parent section, select “Add child page”. This will give you a form to create new content but will already know what “book” you want it to be part of. If you want it to have a listing in the menu system, check the “Provide a menu link” box. Give it the name you want to appear in the menu and select the correct menu.

You can reorder the order of section pages under your content management page, where

there is a tab for "book".

Posting a new event

- Use the "event" content type.
- If you are using Debut RedHen event registration, the first box will be to either disable registrations or use the standard registration. See the section on using this feature for more details.
- Begin by entering the title of your event.
- Next you can check a box if you want an end date for your event.
- The From (start date) is the next required field. A pop-up calendar will appear when you click into the date field or use the format: month/day/year, e.g., 08/31/2010.
- You may add in an optional start time for your event. Use the format: 09:42PM, using the tab button to move from hour to minutes and AM/PM
- Your event may also include an optional end date and time.
- It is recommended that you use both a start time as well as an end date and time whenever possible for the most usable calendar view that will be generated.
- The event content type also includes functionality to add in dates on which an event repeats. Check the Repeat box to use the repeating options.
- Choose the frequency an event repeats, either weekly, monthly or yearly.
- Select the appropriate period for repeating. For example, if you select the monthly repeating you will see options to repeat on a set day in a month or on the first Sunday, for example.
- Select how many occurrences to repeat or fill in an end date.
- You can also skip a date, for example when a weekly workshop wouldn't be held due to a holiday, by checking the exclude dates box.
- Debut Event also includes a taxonomy that allows you to classify events by type and displays them on your calendar with a coloured stripe and corresponding legend.
- The Open Outreach distribution takes the new Debut Event taxonomy and creates the first three terms in the vocabulary for conference, meeting and workshop.
- When creating a new event, you will now be able to select an event type from a drop down list (or select none to leave unclassified.) Users are also now able to filter the events on the calendar page to show only events of a certain type.
- To add or change taxonomy terms, see the instructions under the section, Taxonomy.
- Complete the rest of the fields in the same way you do for the "article" example.

Adding an author bio

The Debut Bio feature displays biographical information about an blogger adjacent to their blog or blog entry.

This information is added to an "Author bio" profile that is part of a user's account.

- Create a new user account if necessary (see Creating user accounts). Ensure they have at least blogger permission (or a higher level such as contributor, editor or administrator).
- Or for an existing user, from the "people" user page, select the edit button for the user. Or depending on the permissions set, a user may be able to edit this themselves.
- You will now see an "Author bio" button at the top of the page. Clicking on this button will let you add a first and last name as well as a short bio. Save your changes then return to the main user edit page via the "Account" button.
- Here you can upload a user picture if you haven't already done so.
- Save all your changes.
- The photo, name and bio will now appear in the sidebar for this user's blog and any of their blog entries.

Posting a new highlighted content type

The highlighted content type is used to create the slideshow on the home page. There are a few key points to be careful of when creating new content of this type.

Image: The image here is larger so it needs to be at least 930 pixels wide. Also, the lower portion of the image will be partially obscured by the text so you may have to choose the images carefully. *There must be an image for the highlighted content type to display properly.*

Kicker: Provide a short (two to three sentence) description of the page you're highlighting. The text is very limited so if it flows over, you will need to edit down.

Link: Enter the address of a page to link to. The address could be a path on your site like articles/my-article or a the full URL of an external page like <http://example.com>.

The slideshow will rotate all the available items in this content type.

Posting a new link content type

Term: First create a list of terms to select from (see Taxonomy section below). Choose from the dropdown list of terms for the links.

URL or file: A link will either be an external resource and you will add the URL or a PDF and you will upload the file.

Working with members-only content

Debut Member provides a content type, **Member page**, that has preset access controls so that only users with the role Member can view this content. This enables site administrators to create a private portion of their site that is not publicly accessible.

When you have first enabled Debut Member, you will have been prompted to rebuild your content access permissions.

You will create member pages in the same way that you do other pages, but there are a couple of caveats.

- If you are the site administrator, you will have the option of adding members pages to a book. However, the child pages that you add, will be of the type "Book page" not "Member page" and therefore will not have access restrictions. The solutions to this are:
- The recommended advice is to not use the book functionality other than how it is used by default in the Section content type.
- If it is important to you to put your member content into books, modify the "Book page" access control settings to match those of the "Member page", but in this case all book pages will be private and therefore cannot be used for any public portions of the site. To change the settings navigate to `admin/structure/types/manage/book/access`. Only the parent, created with the content "Member page" will show up on the Member landing page of content.

If in any doubt about your privacy settings for a particular node, log out and see if you can view it as an anonymous (not logged in) user.

As a non-member, you will also note that the menu link for the member page (in the sidebar) is not visible.

As a viewer with the member (or administrator or editor) permission, the Member content landing page link will take you to a simple page with content teasers listed in descending order. Should you choose to add additional displays to this view, ensure that you assign access controls to your view.

For those members who you want to be able to access, ensure they have the role "Member" assigned to them.

Using the location content type

Overview

- The location feature provides a new content type – location – that will be displayed on a map view.
- A location type vocabulary lets you add categories that can have an accompanying icon so that various types of locations can be graphically identified. Filters let users show only the categories they want to see.
- Content administrators can add locations either by using an address or by directly adding a location on a map view.

Initial configuration

- The first step is to determine what centerpoint and zoom level you would like on your site. This configuration can be found on the Configuration page under Regional and language. (admin/config/regional/debut-location)
- Use the pan and zoom controls to set the map display you would like to show initially. This will also determine the initial map setting for inputting locations. For example, if you are a site based within a city-wide geographic area set the centerpoint and zoom so that just your city shows. This will make the items displayed have more relevance.

Add terms

- Your next step should be to add some terms to the Location type vocabulary
- Under Structure navigate to Taxonomy and then Location type (admin/structure/taxonomy/location_type).
- Add a term giving it the name you want displayed, a description that will help content editors and an icon. A useful mapping icon set can be found at: <http://mapicons.nicolasmollet.com/>
- Terms can be nested, so that you have categories and sub-categories. For example, a category of Agriculture could have sub-categories of Farm stand, U-pick and Vineyard. To do so, first add Agriculture as a term. Next add Farm stand as a new term, using the Relation to make Agriculture its parent term.
- If you want to mass upload icons, you can add the module, Bulk Media Upload (http://drupal.org/project/bulk_media_upload).

Add locations

- Add a new piece of content of the type Location (node/add/location).
- Add the title of your location.
- Fill in the address fields if needed/appropriate (some locations do not have an address and so you may not want to use.) The default country will be the country that is set for your site. If you select another country the correct fields will be displayed. So for example, if Canada is the chosen country, it will show Province as a field as well as Postal code.
- If you want to map your location using the address, click the Find using address field button. Your location will appear on the map.
- If you want to place your location on the map without using the address, you can place it directly on the map itself.
- The icons in the top, right corner of the map determine what kind of item you are adding (polygon, point or line.) Note only a point will display with the selected icon.
- For example, to select a point, zoom your map to an appropriate level to place your point exactly. Click on the pencil icon then click exactly where you want your point to be located.
- Next select the location type (if you are using taxonomy based terms and icons).
- As of June 2013, you also have a location region vocabulary and can select it here if you are using.
- Add a description or any other type of information into the body field.
- Save your location.

Changing the menu label

- By default the menu item displays "Locations." To change this wording and customize, go to the main menu settings (admin/structure/menu/manage/main-menu) and edit the menu item Location, giving it the title and description you would like. Save your changes.

Using location region taxonomy to display multiple map displays

Newly developed functionality (Debut Location beta2 version, as of June 2013) allows for the creation of location regions that can be used to display particular regions. For example, in a community asset map you want to be able to show the whole city in the main view, but would also like to allow users to easily select their neighbourhood.

Add regions

- Navigate to the Location region vocabulary (admin/structure/taxonomy/location_region), and select Add term.
- Give your region a required name and an optional description.
- To define the geographical extent of your region, use the polygon tool on the map to define your region's boundaries, clicking to define each point in your polygon and double-clicking to complete.

Map displays

- Once you have created a region, this will now over-ride the settings you have created for your main map display. This will now be defined as the sum total of all the regions.
- The region maps can be accessed via their taxonomy term id, for example, location/3 (where 3 is the term id for the particular region.)
- This makes it easy to add menu items for the regional maps, for example as child menu items under location.

Editing content

It is very easy to go back into a piece of content you have created and make any changes required. When you are logged in, and if you have appropriate permissions, when viewing a piece of content you will see an edit tab on the top of the piece of content. By clicking that tab you will return to the form on which you created the content.

Simply make any changes as you did when you were first creating the piece of content and save those changes.

Content administration

- To view a list of all content that exists click the "Content" button on the toolbar.
- This is a valuable location for site administrators in managing the content on the site, with tabs for Content, Books, Comment and Files.

- Under the content tab, you can filter by content type, allowing you to search for all events for example.
- You can also filter by status: published, promoted or sticky (see above under Creating new content section for description of these status types.)
- To update any piece of content, you can check the box next to it. Then, select the update option you want (for example, Promoted selected content to front page) and click the Update button.
- Click the edit link to go to a particular piece of content directly in edit mode.
- You can also work with files from this page, by selecting the Files tab. (Note, the images that appear in the recent multimedia on the homepage have all been "promoted" to the homepage.) To promote an image, check the box beside an image and select "Promote selected files" and update.
- Using the Books tab you can reorder the sections in a book. Click on the "edit order and titles" link for the particular book and then drag using the arrow to reorder. Save your changes.
- Using the Comments tab you can approve or delete comments posted on your site.

Homepage setup

The homepage will be automatically populated as content is added to the site. The homepage will display:

- The five most recent highlighted content types displayed in a slideshow.
- The two most recent pieces of content (of the type article, blog, or event) that are marked "promoted to front page" showing an image, the title and a teaser.
- Below this just the title will appear for the next eight promoted pieces of content.
- Below this recent multimedia will be displayed in a carousel with the 9 most recent multimedia files displayed (three at a time). Images/videos need to be "promoted" to appear here.)

The homepage is set up using Panels. Should you wish to change what is displayed in the homepage, you need to edit the homepage panel. Click on the gear at the top, right-hand corner of the homepage to get the "edit panel" link. Here you can add new blocks, delete existing blocks or rearrange.

Blocks and contexts

Blocks are particular ways in which information is displayed on a Drupal site. Some come with a standard Drupal install (such as the "search" block). Others may be part of contributed modules or views, and you can also create custom blocks.

These blocks can be placed in a particular "region" of your site which is determined by the theme you are using. Regions usually include the main content area, sidebar regions, header and footer regions among others.

There are two main ways in which blocks are positioned: using the basic Blocks

administration page and using the Context module.

Context

On an Open Outreach site, blocks are primarily set using Context. The Context module allow you to set "conditions" that lead to certain "reactions".

If you want the change the placement of blocks that have been set using the context module you'll need to follow these steps:

- On the Modules page, you need to enable the module Context UI.
- Under the Structure link in the toolbar, you will find Context.
- All the contexts will be listed, and the descriptions should help you choose which context you are looking for.
- Click the edit button for the context you want to change.
- Most likely you will leave all the other information the same and only change the reaction.
- For example, if you want to move the social media "Follow" block which is set to appear in the sidebar, choose the "social-follow-site" context and click edit.
- Under the reaction section click on "blocks".
- It will show the block as appearing in the "sidebar second".
- Click the "X" to remove it from here.
- To add it to another region, select from the right hand side the block you want to add (in this case "Site follow") and then in the left hand column select the "Add" button for the desired region and save your changes.

Blocks

Alternately, you can disable a whole context and place blocks manually using the block administration page (under Structure). This interface will only show you blocks set using this interface (not those set by context.)

- Select the block you wish to have displayed and then select the region you wish it to go in.
- You can also configure blocks here by clicking on the configure button beside a block.
- This lets you alter other settings, for example to set it so a block only appears on the home page.
- Save your settings.

Custom blocks

To create a custom block, navigate to the Block administration page (under Structure) and select the Add block link.

The title is optional and only needed if you want to display on the block. The description is required and this will be how the block is listed on the blocks page.

Enter the text you want displayed in the body field. You can also add an image or a link. (For a link, highlight the text and then select the link button. Put in the URL of what you

want the text to link to.) Save.

You can style the block by editing their Skins (see section below on theming.)

Menu

- By default certain menu items will appear in the main menu of an Open Outreach site. These will vary depending on which features you have enabled.
- The main menu consists of the tabs on the top of the page, which may include: Home, Articles, Blog, Events, etc.
- To change menu links, go to menu section (under Structure). You can edit existing links or add new ones. You can also rearrange the order of menu items by dragging them. Ensure you save your changes.
- You can also create additional menus, such as a secondary menu where you may place more minor links such as legal information.
- A menu always needs a path which can be found for any piece of content or section in the address bar when you are viewing that piece of content (just what comes after the site name).
- If you are using the Debut Forum feature, you will need to manually add a menu item. Its path will be forum.

Theming

Open Outreach ships with a default theme (which determines how your Drupal site looks)) called Outreach. Outreach has been built as a subtheme of AdaptiveTheme and is fully responsive for mobile devices. Outreach is also highly configurable so you can easily tweak it to give your site your own personalized look.

Outreach theme settings

- The first theme you select at download time will be properly configured with its theme regions recognized, but if you switch to another theme, you'll need to submit the theme setting page (even if you make not changes) so the block regions appear in their correct locations.
- Click on the settings page for Outreach (admin/appearance/settings/outreach) to adjust the standard settings.
- Here you have options to change the sidebar layouts and widths for various devices as well as their breakpoints.
- Many useful options are also available by selecting the Extensions link. For example, if you check the Fonts box and then save, you will now have a new settings option that lets you change your default font, the default font size as well as specific options for letting you work with various elements such as site name, and various titles, letting you easily customize.
- You also have complete control over color settings. You can select one of the preconfigured color palettes or select your own colors by selecting Custom and then using the color wheel or entering 6 digit hex codes.

- The toggle display lets you select which elements will be displayed.
- You also have the ability to upload your own logo and favicon.
- As always, ensure you save your configuration.
- By default, drop down menus are enabled using the Superfish module. If you don't want to use drop down menus, you can disable the Superfish module and using blocks administration page, place the main menu in the menu bar region.

Other theming options

In addition to Outreach theme which is set as the default theme for Open Outreach, there are other themes you can choose to create a different look for your site.

Mix and Match

- *To make Mix and Match your new theme, select "Appearance" from the toolbar. Then select the "Enable and set as default" option for Mix and Match theme. Upon refreshing, the new theme will be loaded.*
- Mix and Match comes with a number of different colour options to choose from and many different items you can give colour or shading to. To configure these settings, visit the "Appearance" section and click the "Settings" button for Mix and Match. Choose your configurations and save.
- As with all AdaptiveThemes, there are numerous settings that you can control from the user interface to change fonts, font sizes, titles. etc.
- All AdaptiveThemes need the settings page saved (even if you made no changes) so that the block regions will be correctly displayed.

Sky and AT Commerce

- Sky and AT Commerce are another couple of AdaptiveThemes that are packages with Open Outreach to give you a range of options in determining how your site will look.
- You can select these at install time or change your theme later on at admin/appearance.
- For AT Commerce you need to change the Style settings for the Superfish 1 block from none to default.
- As with all AdaptiveThemes, there are numerous settings that you can control from the user interface to change fonts, font sizes, titles. etc.
- All AdaptiveThemes need the settings page saved (even if you made no changes) so that the block regions will be correctly displayed.

Bartik

Bartik is the default theme that ships with Drupal 7. It will also exist on any Open Outreach install and can be easily used.

- Bartik will already be enabled by default so you need only choose the option to "Set as default" under the "Appearance" page.

Other themes

Drupal contributors have produced hundreds of themes that are available for free download. You can review all available themes at <http://drupal.org/project/themes>. Ensure that you filter by compatibility choosing 7.x. For instructions on downloading themes see <http://drupal.org/getting-started/install-contrib/themes>.

Taxonomy

- The taxonomy system is a way of categorizing content. A vocabulary is created and within that vocabulary terms are added.
- The tags vocabulary is created and available for a variety of Open Outreach content types, such as Article and Blog. Terms can be added to this vocabulary “on the fly” as you are creating pieces of content.
- The vocabulary Link terms is created by Debut Link so that links/resources can be categorized.
- As of RC4, Debut Event includes an Event type vocabulary to categorize events.
- To add terms to a vocabulary, select taxonomy from under the structure button in the toolbar (admin/structure/taxonomy). Choose the vocabulary you want to work with and select the add terms button. Add a new term and save. Or edit the name of an existing term, should you wish it to be slightly altered.

Captcha and Captcha Riddler

- To cut down on spam submissions, the Captcha module is enabled as part of the Comment Feature.
- By default it is set to use the math Captcha, both on log in and on various other form submissions on the site.
- We have also recently added the Captcha Riddler module, as a better level of protection from spam for sites where users can be expected to know the answer to particular questions.
- To add new riddles, navigate to admin/config/people/captcha/riddler to remove the default riddle and add your own.
- Then visit the main Captcha page (admin/config/people/captcha) to set Riddler as the default challenge type.

Enabling the contact form

- If you did not already enable the contact form at install time, to add a contact form to your site, first ensure the Contact module is enabled on the Modules page. If not, enable it.
- The next step is to set the permissions (under People), usually so that both anonymous and authenticated user can access the site-wide contact form.
- Once the module is enabled, you will find a link to it in the Structure section. Here you can customize the email addresses used.
- A menu link is created in the Navigation menu (set as disabled). Enable this and move to the Main menu if you want it to appear in your main menu. Some users

may want to create a secondary menu and have it appear there. (See Menus, above.)

Enabling the search block

- A search block exist by default, and search permissions are already set, so you can simply use the blocks administration page (under Structure) to place the search bar in the region of your choosing.

RedHen Contact Relationship Management

RedHen CRM enables your Drupal site to also be your contact management system, allowing small groups to effectively collect and store important information about contacts and members without having to set up a second system. RedHen is built natively within Drupal, so its integration is seamless.

Getting started with Debut RedHen

- If you haven't already done so when installing Open Outreach, enable Debut RedHen through the Apps interface.
- Once enabled, you will have a new tab on the top of page toolbar for RedHen. Clicking on this link will take to to the CRM Dashboard, which will be your key entry point for using the CRM.
- The structure link should be your first starting point. (This can also be reached via `admin/structure/redhen`).
- The Debut RedHen feature starts you off by having created one contact type which has been called "General". This contact type comes with fields for first and last name; email address(es); address; type of contact as well as an additional information field which can be temporarily used for a phone number (until this feature is added to RedHen) or other information.
- The type of contact is set by using a "Contact type" vocabulary which comes with the initial terms of Funder, Media, Staff and Volunteer. These terms can easily be added to, altered or removed under `admin/structure/taxonomy/contact_type`.
- You will only need to add a new contact type, if you need there to be different fields than are present for the General contact. For example, perhaps you want to use your CRM for additional information about staff. To do so you would add a new contact type (`admin/structure/redhen/contact_types/add`), and then add the additional fields you require. Note: you need to ensure that the Field UI module is enabled to be able to add fields. You would probably also delete the term Staff under General contact so as not to create confusion.
- You can also add additional fields to the general contact should there be additional information you wish to collect for all contacts.
- The same approach has been taken for organization, where there is a General organization type and then organization type vocabulary terms for Business, Foundation, Government and Nonprofit.

- Once you have done your basic configuration of your types of contacts, memberships and organizations and their related terms and fields, you can begin to add contacts.
- Navigate to your CRM dashboard, and select the applicable link. For example [redhen/contact](#) and then select the add contact link.
- For contact, the first and last name are required fields, while others are optional. For an email you can add both a home and work email, by completing one, then selecting the Add another item button.
- As mentioned above, a phone field does not yet exist in RedHen (due to the complexity of handling the verification of phone numbers over a wide array of countries), so in the short term the Additional information field can be used for phone numbers.
- Save your contact.
- If the email address matches a Drupal user account already on your site, RedHen will link the contact to the user account.
- Once your contact record has been created, you can now take advantage of some of RedHen's tools. The record for a contact will have tabs for Summary, Connections, Memberships, Engagement, Notes and Activity.
- You can connect a contact to an organization by selecting the Connections tab. Choose between connection types of Affiliated with or Personal connection. Then start typing in the name of an organization that exists in your CRM and select from the list of matches that appear. You then need to choose if this is an admin connection or a membership connection.
- You also similarly add membership status by selecting the membership tab and configuring.
- Notes can be added to a contact, and to those notes can be added engagement scores. So for example, if you are writing up the notes of a meeting with an individual, you might add an engagement score of high which will, then be automatically scored for this contact.
- Notes comes with a Note vocabulary but no terms have been created, so if you want to categorize note types, go to the Note vocabulary and add terms.
- The tabs for Engagement and Activity let you see what has been generated for this contact for both engagement and activity.
- Organizations are added in much the same way as contacts, with the organization's name being the required field. There is also a field for the organization's website, as well as address and the type of organization (based on either the default terms in the Organization type vocabulary or those that you have added or edited.)
- For membership types, a Standard membership exists. If you have different types or classes of membership, you can add them here. For example, a professional organization may have regular members, student members and retired members.

Adding contacts

Adding organizations

- For organizations, you can add connections with contacts.
- You can also add a membership to an organization and can also add notes (but organizations do not have engagement scores.)

Debut RedHen roles and permissions

- The roles and permissions for the CRM are somewhat different than for other Debut features.
- The roles CRM Manager and CRM Viewer are created. They will need to be granted to users in addition to their other roles (such as editor or blogger as appropriate.)
- It is assumed that in an organization, many people will need to be able to view the CRM and so creates this quite limited role but one that allows them to view contact, organizations, activity etc.
- Anyone who needs to be able to add or edit contacts should be given the CRM Manager role.

Debut RedHen event registration

- To allow event registration functionality using RedHen, enable the Debut RedHen event registration sub-project on the modules page (you will also need to enable the RedHen Registration and Registration modules.) You also need Debut Event enabled.
- Now when you create an event, you have the option of adding registration.
- If you do so, then once you have created an event, you will see a tab Manage Registrations. Select this tab and then Settings to be able to configure the registration settings for your event.
- Check the enable registration box to allow registration.
- Set the capacity if there is one.
- Configure open and closing dates for registration should you desire.
- You can also set to send a reminder message and configure the message.
- Select whether an individual can register for more than one space.
- Enter the email address to use for these messages and save.
- Now a viewer will see an option to register on the event node.
- You can administer registration types and states at admin/structure/registration.
- You can manage registrations via the CRM dashboard or via the node for any event with registration enabled.

"Groupify" with RedHen

You can use RedHen's sub-module, RedHen Organization Groups, to enable group collaboration features for organizations. A "groupified" organization can have content associated with it. Optionally, this content can be made private, and therefore only viewable to Drupal user accounts associated with RedHen contacts who are in turn associated with a specific RedHen organization.

- Enable the RedHen Organization Groups module via the modules page.
- Go to the organization type settings screen (`admin/structure/redhen/org_types`) and select the edit link for the organization type you want to add groups functionality to. (Or optionally create a new organization type to "groupify".)
- Select "Groupify."
- Optionally select whether group content should be private to Drupal user accounts associated with contact entities associated with a specific organization.
- Select the content types that can be posted to these groupified organizations.
- Finally, when viewing an organization entity, you will see a "Content" tab that lists nodes that have been associated with the organization.
- When creating new content of a type that is available to be posted to a group, you will have as an additional field a select list to choose the appropriate group from. Note: as this field is added as a final field, it will by default appear under the save button. You may wish to re-order your fields via the manage fields tab on the appropriate content types (`admin/structure/types/manage/blog/fields`).
- If choosing to make this field private to only members whose user accounts are attached to RedHen contacts that are members of the group, you will need to alter some settings, such as removing the share and email links that are attached to these now private pieces of content.

Setting up a multilingual Open Outreach site

There's lots of great documentation about setting up a multilingual Drupal site on [drupal.org](https://www.drupal.org/documentation/multilingual) (<https://www.drupal.org/documentation/multilingual>). See in particular the post [How To: Basic Internationalization Setup](https://www.drupal.org/node/1268692) (<https://www.drupal.org/node/1268692>) where much of this documentation was gleaned from.

Getting started

- Download your Open Outreach site as usual, with English as the language.
- Enable the Locale and Content translation modules (core) and the Transliteration module (it may have already been enabled depending on the features you enabled.)
- Download and enable Variable (<https://www.drupal.org/project/variable>), Internationalization (<https://www.drupal.org/project/i18n>), Localization Update (https://www.drupal.org/project/l10n_update) and Internationalization Views

(<https://www.drupal.org/project/i18nviews> using the version that corresponds with Views) modules.

- Depending on your uses, you'll likely also want to enable many of the Internationalization sub-modules:
 - Block languages
 - Contact translation
 - Field translation
 - Internationalization
 - Menu translation
 - Multilingual content
 - Multilingual select
 - Path translation
 - String translation
 - Synchronize translations
 - Taxonomy translation

Translation sets

- Under configuration/regional and language/language/add language, select the language you want to add. The language files for your selected language will be added. This will take some time.
- Once finished, the new language will be shown in the list view. English, will show as the default language. If you want to change the default language, you should do so now before further work on the site proceeds.
- Under the Detection and selection tab, you can select the methods for identifying how the language preference should be detected.
- Under the Translations tab, you can select settings for updating translations.

Switching languages

- A language switcher block will be available for adding to your desired region. Navigate to admin/structure/block and place the block Language switcher (User interface text) into a region (the second sidebar will be a consistent choice for Open Outreach).
- Using this block, you can now switch into your second language and see how much of the interface is translated.

Translating content

- The first step in setting up multilingual content is setting each content type you will be using to be multilingual.
- Navigate to structure/content types (admin/structure/types) and for each content type select the edit tab.
- Under publishing options, set the multilingual support to Enabled, with translation. Save.
- Now when you create a new piece of content that you wish to appear in two (or more) languages, create the piece first in the default language (in our example

- English). Fill in all the fields in English and select English as the language. Save.
- Once saved, you will now see a tab, Translate. Use this tab to add the translation, filling in all the fields in your second language and selecting that language from the select list. Save.
- For existing posts you wish to add a translation to, you can manually update the publishing options for a particular node and then set the language, adding the translation (either directly or if nodes already exist in both languages then by adding the translated node to the translation set.)
- Many languages use accents which it is helpful to have stripped out before creating the URL path alias. Navigate to configuration/search and metadata/url aliases/settings (admin/config/search/path/settings) and check transliterate prior to creating alias.
- For some content types (for example, highlighted), you may want to enable the synchronize functionality to enable you to upload the image only once but have different text in your different language.
- Set the multilingual support settings as described above (enable, with translation), then save.
- Now return to this content type and under the synchronize translations tab, select image and save.

Working with views

- This requires going in and making some adjustments to the views in use for content display so that only content with the desired language will be displayed. Even if you're not familiar with views, some of the changes will be quite straightforward to make.
- The following change can be used for article, blog, highlighted and link.
- Navigate to the main views administration page (admin/structure/views) and click the edit link for the corresponding view (article, blog, highlighted, link).
- The change you need to make is to add a filter so that only posts in a particular language will be displayed.
- Under filter criteria click the Add button.
- Find the Content translation: language and add it.
- Then configure it by selecting Current user's language under the language section. Save.
- Now the blog landing page will show only the blog posts in the selected language.
- Because the homepage is made up of a collection of views, once all the relevant views have the current language filter added, the home page will show only those items that are in the current user's language.

Translating menu and menu items

- Navigate to structure/menus/main menu/translate (admin/structure/menu/manage/main-menu/translate). Here you can translate the menu title and the description (translate tab).
- Under the edit menu tab, select Translate and localize to enable you to translate menu links.

- Under the List links tab, you will need to edit each menu item you're using and set the language to English and save.
- Then you can select the Translate link for each item and provide the translation for the selected language. If the menu path is a node, you will first need to translate the node. Ensure you add in a description for the language as well for the hover over link.
- This method will give you menu links in each language, which may be cumbersome with a large menu link set. You can also use a method to translate the menu strings, following the same basic steps as for working with taxonomy terms (see below.)

Translating strings

- Depending on the language you're using, much of the interface will be translated. There will be parts of Open Outreach and its related Debut features set that are not though, so you may need to go in and add translations for strings in use.
- Start by ensuring that your strings are up-to-date for the area you're working on, such as views, by visit the translate interface, strings tab (admin/config/regional/translate/i18n_string). Check the text groups you want to refresh and then click the refresh strings button. This may take some time to refresh.
- Next, navigate to the translate tab and search for the string you want to translate, using the filtering system to narrow down your search, for example to strings in views. Once you've found the string, click the edit link, add your translation and save. You'll likely need to flush caches for your translations to take effect.

Translating vocabularies and taxonomy terms

- The Taxonomy translation sub-module provides four different ways you can translate vocabularies and terms. Your particular website may have needs that are best served by a specific choice. Read more about the four options at <https://www.drupal.org/node/1114016>.
- For many sites, the simplest method will be to select the Localize option. This will ensure that there is not a duplication of the terms but rather that they are translated using the translation interface (but still have the same term ID).
- Each vocabulary can be set differently so you can also fine-tune how this works for various types of vocabularies. For example, some may want the same terms translated and for others there may be different terms in the different languages.
- Navigate to the main taxonomy page (admin/structure/taxonomy) and select the edit vocabulary link for the vocabulary you want to update. Choose the option of multilingual support you want, for example localize, then save (or save and translate which will take you to the translate interface where you can add the translation for the vocabulary name and description.)
- To translate terms using the localize method, visit the translate interface to ensure your strings are up-to date (admin/config/regional/translate/i18n_string), checking taxonomy and refreshing.
- Then select the translate tab, and find your string, filtering by taxonomy to limit your search. Edit to add your translation and save.

For the latest documentation on Open Outreach please see <http://openoutreach.org>