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The StoriedMaps community mapping distribution is built on Open Outreach. This documentation is based on the documentation developed for Open Outreach and updated to reflect the new functionality provided by the StoriedMaps components. Details specific to the StoriedMaps (locations and stories) can be found starting on page 7 with details regarding layout starting on page 13. Much of the other documentation will help you get going if you are unfamiliar with Drupal or Open Outreach.

For the latest documentation on Open Outreach please see [http://openoutreach.org](http://openoutreach.org)

**Using the admin menu toolbar**

- As a site administrator (when you are logged in 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](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](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**

The following roles are enabled on the 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).*
- 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.

**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.

A StoriedMaps website includes the following content types:

**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.

**Location**: For showing a geographic location on a map.
**Story**: A story is a descriptive piece that is related to a particular location. It can be posted by an authenticated user for approval by a site moderator.

**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.

**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 a 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 appeal 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.
- 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.

**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 1140 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.

**StoriedMaps: Using the location content type**

**Overview**

• The location feature provides a 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.

• If you install the full StoriedMap distribution, a set of sample icons and their accompanying terms will be created. You can use these or delete and add your own terms and icons.

• The initial sample icon set is provided by SJJB Management (Map icons CC-0). Should you want to use these icons, a full set can be downloaded (http://sjjb.co.uk/mapicons). A more full icon set will likely be added in the future.

• Content administrators can add locations either by using an address or by directly adding a location on a map view.

**Add terms**

• Terms allow your locations to be categorized and the locations on the map display will be shown with the related icon.
• 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.
• Terms should 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.
• When adding terms and their icons, it is critically important than a standard format is used as the display of these terms and their icons depends on consistency:
  • Ensure consistent use of either Title Case (where each is capitalized) or Sentence case (where only the first word is.)
  • A description for each term will be useful and will be our best place for describing the icons and what is included in a category. This will show on the taxonomy term page.
  • The icon uploaded should be at a larger size (e.g. 100px by 100px) and then various displays will use a smaller display based on image styles.
  • Terms will need to be correctly assigned to their parent term.
  • The title field (which appears after the icon is uploaded) should be used with the same text as appears in the name field. This will provide the icon title is a mouse over (which when only the icon is displayed).
• Finally, when using a hierarchy of terms, choose only the lowest level. So for example, if you have Sustainable living as a top category, with a subcategory of Green economy, and then finally Farmers market under that, select Farmers market as your term.

Add locations
• Add a new piece of content of the type Location (node/add/location).
• Add the title of your location.
• Add an image (see instructions above) that will be related to your image. It is strongly recommended that you add an image for each location as it will appear in may views on the site.
• 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
• 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 a hierarchy of terms, choose only the lowest level (see above).
• If appropriate, you may also select the location region term (see below).
• If your location is an organization or business, check the box indicated. This will then reveal additional fields to be filled in:
  • Organization name
  • Website
  • Email
  • Phone number
• Add a description or any other type of information into the body field.
• If desired you can also add related media, such as additional images, videos or PDFs.
• Save your location.

Using location region taxonomy to display multiple map displays
Location regions 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. (See below for details on working with menus.)

StoriedMaps: Posting stories
• You can add stories as with any other piece of content, with the following distinct fields:
• Told by
• Approximate start date
• Approximate end date
• Submitted by

• Next an an image that relates to your story. It is highly recommended that all stories have an accompanying image as they will be used in many views (displays) on the site.

• The next field is location. This allows each story to be related to an existing location on the site. Start typing in the name of the location. An autocomplete will give you options to select. This field has not been made mandatory so that a story can be completed without an existing location. In this case, the location should be created and then the story edited to add the corresponding location.

• A story includes a story type vocabulary so that you can categorize stories. By default the vocabulary does not have any terms, but you can add them via the taxonomy interface (admin/structure/taxonomy/story_type) and then use this select list to choose the type you want.

• A story can also have a tag, which gives users a way to identify their story using a free tagging vocabulary.

• Media items can also be added.

• An important difference to the story content type is that by default it is unpublished. This is because in addition to administrators, editors and contributors (who can post any content type), an authenticated user may also post a story. It will not be published until it has been reviewed by an editor.

**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.

**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 a StoriedMaps 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”.

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• 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 a StoriedMaps 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).

Here you can add new items or edit an existing item to change its text, description (which is viewed when hovering over) or parent item (for nested menu items).

**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 StoriedMaps 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 term is used to categorize links/resources.

• The vocabulary Event type is used to categorize events.

• The vocabulary Location type is used to categorize locations.

• The vocabulary Location region is used for managing the extent of regional maps.

• The vocabulary Story type is used to categorize stories.

• 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.

• See the location section for detailed instructions on working with Location type and Location region vocabularies and terms.

**Theming**

**Outreach theme settings**

• Click on the settings page for Outreach (admin/appearance/settings/outreach) to adjust the standard settings.

• Note: Even if you want all the default options, you need to save the settings page to ensure that the theme will function properly. The blocks are not correctly assigned to regions until the settings page is saved.

• 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.
**Homepage and landing page overviews**

The homepage and landing pages are 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. The same would be true for the landing pages. *This work should only be done by a site administrator.*

**Homepage setup**

- The top element is the highlighted slideshow. This has been resized to fit the full width of the page without using any sidebars. By default this can have up to five images that require kicker (one to two sentences) text and a link to a part of the site. Photos need to be ones that will work well with this narrow band, and should be cropped and resized accordingly (1200 px in width by about 350 in height).

- Below that is an element that displays icons. Icons will be displayed here in a random order—which means the eight will change on each page load. The icons can be clicked to see that particular term it represents (with description and the locations that are associated with the term). There is also a link to the full, all icon page where all icons are displayed.

- Below are two similar panes, one for recent stories and one for recently added locations. Each pane will show the four latest items for each content type (story and location) that have been promoted to the home page, with links to the full page display for all locations or all stories. As well as the image associated with the content they also show relationships (the stories show which location they relate to and the locations show which category they are a part of) and the associated icon.

- Finally there is a carousel of the latest media (image or video) that has been promoted to the home page. If you want to limit this to just latest videos, you can update the view at (admin/structure/views/view/media/edit/block_1) and under filter criteria, change the file type to be just for videos.

**Locations:**

**Map:**

- The location map page is accessed via the main menu (location).

- Regional maps can shown in the drop-down menu as "child" menu items if added to the menu.

- The map page is set to show as wide as the viewers’ screen to make the map more useful, with a filterable legend in the sidebar.

- Icons will be clustered if there are too many icons in a certain space to display. Click on the number to reveal the items in a the pop up. As you zoom in, the cluster will resolve into individual icons.

- When clicking on any icon, a pop up will provide additional information and a link to the item.
Location listings:

- The Location listings tab in the main menu takes you to that landing page (location-landing).
- There you will see two featured locations at the top (promoted).
- Below them are the next 10 most recently added locations with a link to view all locations. This view has been set up with something called a Masonry grid so that the items will fit together as they best should in that space. For our purposes it means either a vertical or horizontal image will work. This kind of grid is also responsive, so the items will re-stack themselves for a smaller screen.
- The side column in this panel page will show a listing of all the categories identified only by their icon. The title will show in a mouse-over. A second pane in this panel shows the icons divided into categories. You may decide to remove one of these depending on which is more useful on your site. (See working with Panels)
- Clicking the link to view and filter all locations (location-listing) will take you to the views page where all locations are visible (with a pager once we have many items).

Location node page:

- When you click on an individual location, you’ll see the over-ridden node display for this content type.
- The text about the location and the location image are at the top, followed by the geofield map display on one side and the location type and region on the other.
- Below that will be the organization information (if any) and then linked stories.
- One featured story related to this location will show on the right and then below another five linked stories.

Stories:

- Access the story landing page, via the main menu (story).
- Two featured stories are at the top.
- Below is a pane with the ten latest stories and a link to the all stories page.
- Finally there is a media carousel showing the latest images and videos.
- Individual story nodes are using the standard Drupal node display.

Taxonomy term page:

If you click on any location type term you will have a panels page with the following attributes:

- Icon and description.
- List of all locations classified with this term in alphabetical order.
**Icon page:**

There is also a page (linked to from the home page pane showing icons) that will show all the icons with their names.

For the latest documentation on Open Outreach please see [http://openoutreach.org](http://openoutreach.org)