How To Guide

Congratulations and welcome to the OpenAction community! This 'How to Guide' will help connect your online content so that it is more discoverable to your website's visitors. Let's get started!

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Figuring out What You Want to Map

The first thing to do is decide what the markers (points of interest) on the map will represent. The markers can represent anything, or any combination of things. Points of interest can include people, projects, events, activities, etc. Think about what is most relevant to your community, and your target user.
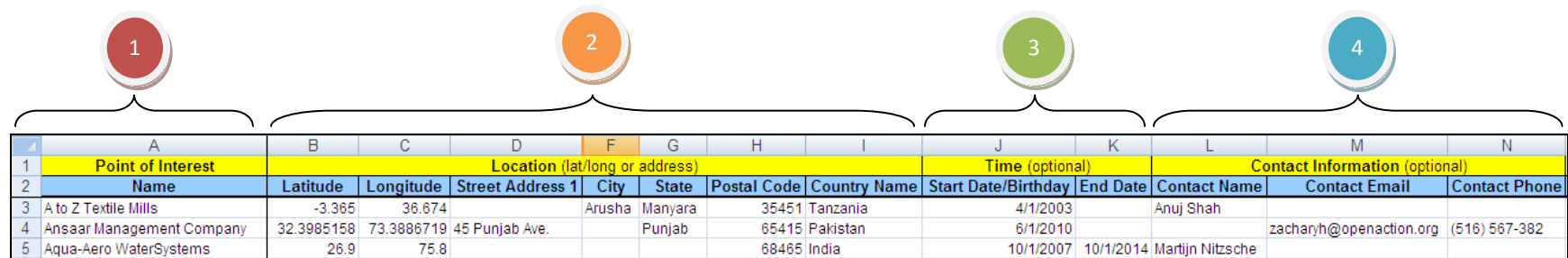
Identifying Your Data Source

Do you already have existing information about your points of interest stored in Salesforce, a database, or an Excel file? This is a great starting point, as you can easily publish this existing information to an Excel or CSV file to run through our application.

No worries if you don't have any information to start with. You can create an excel file or crowd source (multiple contributors of content) by creating a Google form or sending out a survey.
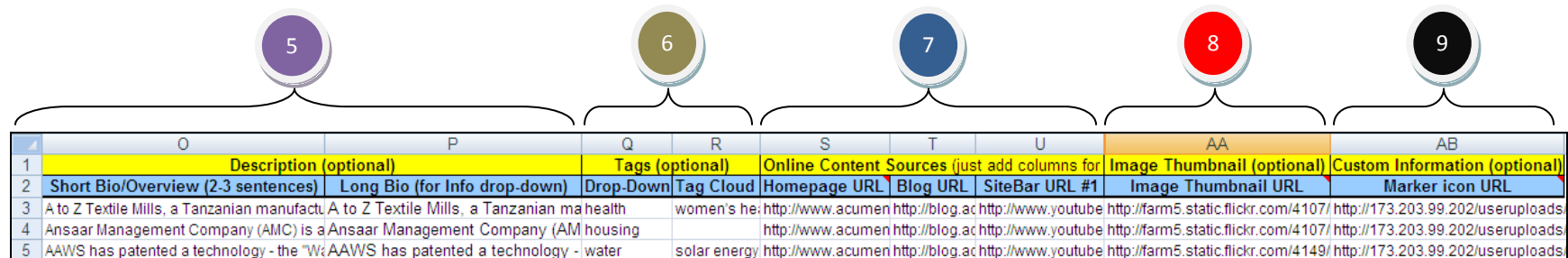
For more robust database integration, refer to your sales representative.

Setting up your Data

Your widget corresponds to the columns in your Excel/CSV file. To power the map, all you need is 'Point of Interest' and 'Location.'

	A	B	C	D	F	G	H	I	J	K	L	M	N
1	**Point of Interest**	**Location** (lat/long or address)							**Time** (optional)		**Contact Information** (optional)		
2	**Name**	**Latitude**	**Longitude**	**Street Address 1**	**City**	**State**	**Postal Code**	**Country Name**	**Start Date/Birthday**	**End Date**	**Contact Name**	**Contact Email**	**Contact Phone**
3	A to Z Textile Mills	-3.365	36.674		Arusha	Manyara	35451	Tanzania	4/1/2003		Anuj Shah		
4	Ansaar Management Company	32.3985158	73.3886719	45 Punjab Ave.		Punjab	65415	Pakistan	6/1/2010			zacharyh@openaction.org	(516) 567-382
5	Aqua-Aero WaterSystems	26.9	75.8				68465	India	10/1/2007	10/1/2014	Martijn Nitzsche		

	O	P	Q	R	S	T	U	AA	AB
1	**Description** (optional)		**Tags** (optional)		**Online Content Sources** (just add columns for			**Image Thumbnail** (optional)	**Custom Information** (optional)
2	**Short Bio/Overview (2-3 sentences)**	**Long Bio (for Info drop-down)**	**Drop-Down**	**Tag Cloud**	**Homepage URL**	**Blog URL**	**SiteBar URL #1**	**Image Thumbnail URL**	**Marker icon URL**
3	A to Z Textile Mills, a Tanzanian manufactu	A to Z Textile Mills, a Tanzanian ma	health	women's he	http://www.acumen	http://blog.ac	http://www.youtube	http://farm5.static.flickr.com/4107/	http://173.203.99.202/useruploads/
4	Ansaar Management Company (AMC) is a	Ansaar Management Company (AM	housing		http://www.acumen	http://blog.ac	http://www.youtube	http://farm5.static.flickr.com/4107/	http://173.203.99.202/useruploads/
5	AAWS has patented a technology - the "Wi	AAWS has patented a technology -	water	solar energy	http://www.acumen	http://blog.ac	http://www.youtube	http://farm5.static.flickr.com/4149/	http://173.203.99.202/useruploads/
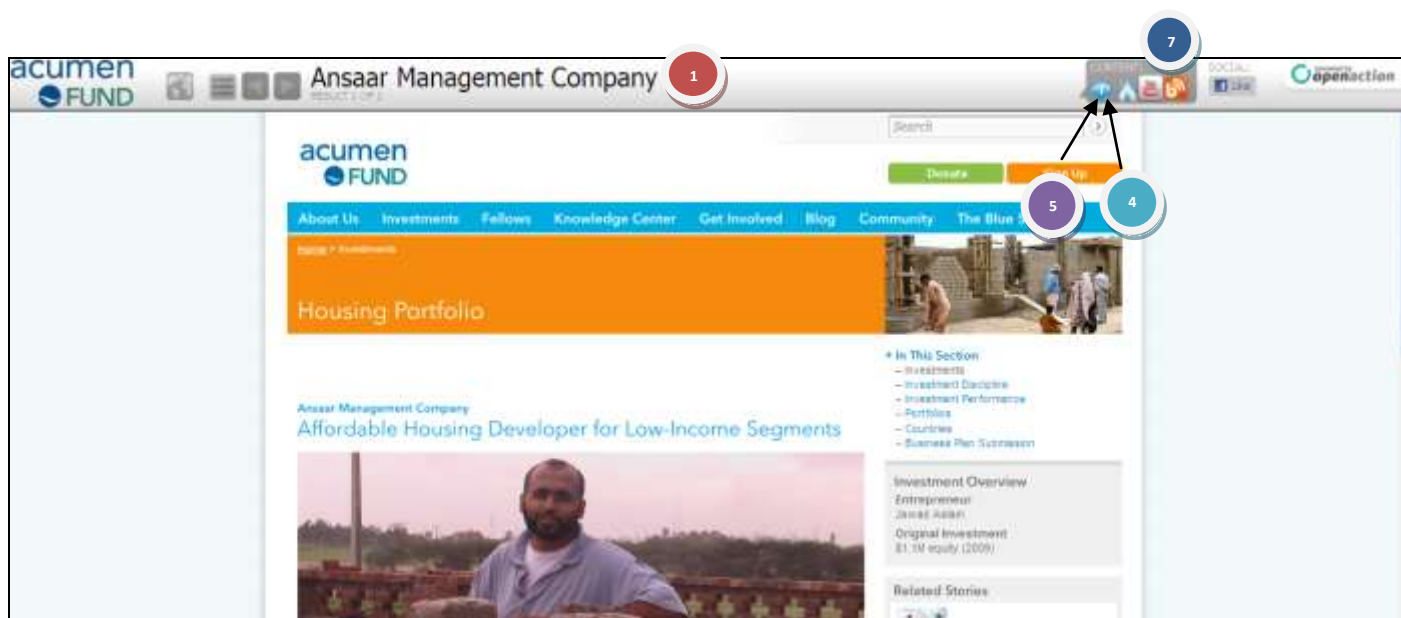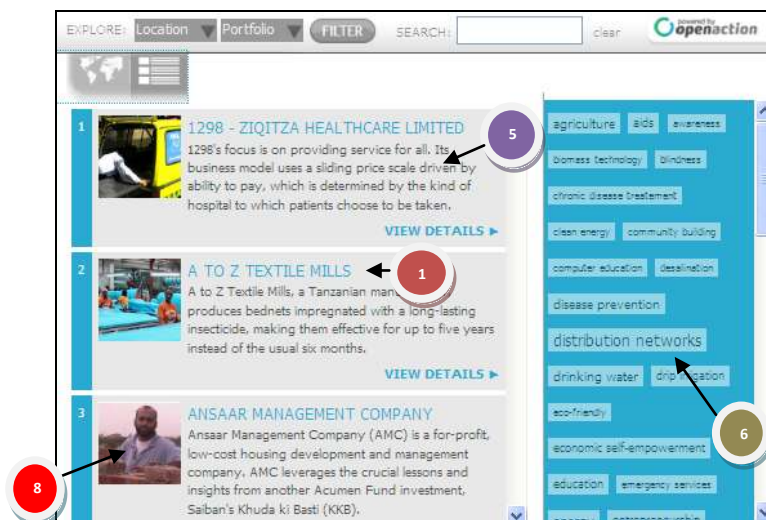
Point of Interest: ①

The name of what the map marker represents. (A person, project, event, etc)

Location: ②

This generates the location for the map marker. For precise location, you can specify the longitude and latitude (refer to http://itouchmap.com/latlong.html) or you can provide an address. Address is flexible and can be street, city, state, and/or country.

Time: (optional) ③

Coming soon, our application will be able to filter points of interest by time. This applies if your project has start dates and/or end dates, you are mapping events, or you want to include birthdates of individuals.

Contact Information: (optional) ④

If a point of interest has contact information, you can include name, email address and phone number.

Description: (optional) ⑤

A brief summary of the point of interest will be included in both the map bubble, and list view. We recommend keeping it short (2-4 sentences).

A longer description can be included and will appear in the information drop-down on the site bar.

Tags: (optional) ⑥

Help your community find exactly what they're looking for through the use of tags. Tags are used both in the search filters as well as the tag cloud. Each point of interest can have unlimited tags.

Website links: (optional) ⑦

Each point of interest can link to relevant websites. Examples include Facebook, Blogs, Twitter, LinkedIn, YouTube, Websites, Profile Pages, Donation Page, or Volunteer Registration form, etc.
> NOTE: Video playlists, profile pages, and photo sets usually have their own distinct URL. To properly link to the right content, make sure to copy the correct link.

Image Thumbnail: (optional) ⑧

Each point of interest can have an image (i.e. a logo or person's photo). Just provide the website link for that specific photo.
> NOTE: If you don't have a thumbnail, photo sharing sites like Flickr can automatically create one for you.
> NOTE: We can help with resizing of images as needed.

Marker Icon: (optional) ⑨

The map supports custom map markers. If you know the exact map markers you'd like to use, you can include a URL link to where the image lives online.
> NOTE: If the image requires transparency, make sure it is a PNG file with a transparent background.

Customizing Your Widget

Easily customize your widget to match the design of your website. Everything from the drop-down filters, the map, the markers, to branding can be done by filling out the customization form provided by your customer service representative.

Integrating with your Website

Embed Code (as Easy as a YouTube video)
You're almost finished! Once you have sent us all of your information, we will provide you with a line of HTML code. Add the line of code the same way you would embed a YouTube video and that's it. You're done! Consult with your Web Manager or your sales representative if you have any difficulties.

Updating Your Content
If you would like to update your content, all you need to do is simply update the Excel or CSV and email it to us. For live syncing and API integration, consult with your sales representative.

Future Features

We are driven by what our users want. We are constantly developing additional features that can help bring greater value to your community. Below are a few features that we plan on rolling out in the months to come. We'd love to hear your feedback or if you have any suggestions for additional functionality.

Timeline
The OpenAction timeline further enhances a project's ability to share impact with visitors. Updates can be viewed along a project's lifecycle to show a story of progress. The timeline automatically pulls content from online sources, preventing information from becoming static and outdated.

Subscription Feeds
Users will have the ability to subscribe to, and follow, updates from specific points of interest. Subscription list serves can be created from multiple points of interest with a common theme (i.e. all projects in India, all clean energy initiatives).