MAPX GUIDANCE DOCUMENT

Create your own story map on MapX
Version 3.1
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Story maps are a simple yet powerful tool to inform, engage, and inspire your audience with any story you may want to tell. Story maps are an effective way to harness the power of maps and geo-spatial visualization, bring data to life and make stories often hidden in data accessible to both the wider public or to a targeted audience including policymakers.

A story map is a web application that combines a narrative, photos, and videos with interactive maps. The MapX story map engine allows users and visitors of the platform to independently build story maps without any GIS or programming skills. Storymaps can cover a wide variety of subjects and tell any type of story.

This document aims to provide MapX users with technical guidance on how to build a successful story map that is both interesting and informative. Furthermore, it includes the step by step procedure necessary to build a story map.

1. How to tell a great story?

A great story map is visually appealing, simple, focused, and flows both seamlessly and logically.

1.1. A simple and targeted narrative

First, think about your audience. Before you build your story map, think about who you want to reach, what you want your key messages to be, and how the audience may find it meaningful. Do you want to raise awareness, be informative or catalyze action? Craft your text, maps, and other content to suit your audience and your objectives. Avoid jargon and acronyms that might be confusing to viewers unfamiliar with the topic of your story.

Next, think about your text, including the title and subtitles. It should be simple, clear and compelling. The more you focus on essential elements, the more likely you are to tell an effective story. A person should not have to get to the fifth or sixth section in your story to understand its concepts and objectives.

In any medium, a good story typically has:
Characters (i.e. a human face)
A challenge to be faced
Action
A turning point when change happens
A resolution
1.2. Prepare your story narrative

To prepare your story map, you will need to:
- Identify and collect the base layers of data required to tell your story;
- Collect any supporting media (i.e. photographs);
- Interview relevant people;
- Know the problem;
- Be able to contextualize the problem;
- Know affected populations or beneficiaries of a project;
- Identify people who provided technical assistance;
- Identify challenges and outcomes;
- Know the timelines involved in your story.

We recommend creating what is known as a storyboard to plan your story map before developing it on the platform. With each step you should know what the content will include: a title, text, picture, video, and/or spatial data. You should then make sure the data is available within MapX. An example of a storyboard can be found here.

1.3. Easy-to-read maps

Make sure your maps are as simple, clear, and user-friendly as possible while incorporating cartography that matches your project. Edit your map to eliminate unnecessary details.

Choose an appropriate base map; for example, in many cases, a simple grey background map might be better suited than satellite imagery with too many details. Think about what custom pop-ups, legends, and symbols you want to provide to deliver your map's message.

1.4. Multimedia content

Media should also be optimized for web use. Make sure your image sizes are appropriate for use in your story map. For instance, using a 10MB photo is never a good idea in a web app. We recommend using photos with a size of 2-5MB.

Also remember to test your story map on different screen sizes and different devices (computer, tablet, smartphone): what looks great on one screen doesn't necessarily look great on another. This is particularly true between computer screens and mobile phones.

1.5. Tips for story development

- Start your story with a strong message: choose an image that's exciting and attractive. Images are almost always better openers than maps!
- Craft your title to be intriguing and descriptive. Choose a title for the story that indicates the theme and the country.
- Begin with an introductory paragraph that summarizes the story and its conclusion. Try to include basic answers to the questions of ‘why, who, what, when, where.’
reader should have a good idea of what took place after reading this paragraph, which should be about 50 words.

- Provide more details in the following paragraphs, elaborating on the brief information in the first paragraph.

- Catch the audience’s interest: use images, key figures etc.

- Make your titles and subtitles active, engaging, and concise.

- Personalize your story: add pictures, citations, interviews, videos etc.

- Insert a quote or two at the beginning of a paragraph. If you include quotes, give the first and last name of people quoted in the story and their job title and institutional affiliation, or occupation and name of village.

- Write short paragraphs – try to keep them under 100 words.

- Break up the text with short subheadings every three or four paragraphs.

- For a 10-page story map (which can be converted into a 2-3 minutes video), expect to write between 700 and 1,200 words.

- Adapt the amount of text depending on its end-use: more text would be ok for online reading where less text would be appropriate if you plan to use this as a presentation.

- Give a voice to your story: call to action at the end of your story map if necessary
2. Walkthrough guidelines

2.1. Quick glossary

The story map functionality uses a precise vocabulary. Here is a quick glossary for MapX to understand the meaning of each word when you build your story:

- **View**: a view is a layer you can activate on the map to visualize data: just click on a circle next to the view title to see the associated data.
  
  **NB**: a story map is a type of view, but instead of showing data, it shows the content of the story.

- **Step**: the steps of your story map are what appears on the screen. These are equivalent to “chapters” of your story: when the first chapter is over, create another by adding a new step.

- **Slide**: a slide is the box containing the text or images you see on your screen. You can show different slides one your screen, meaning you can add different slides for each step.

- **Class**: the class is the parameter given to your slide. It determines the position of your slides on the screen, the level of transparency, etc.

2.2. Create the layer of the story map

2.2.1. Select the relevant project for the content of the story map

To get started with building a story map, you first need to select the ‘project’ within which the Story Map will be saved and create the file that contains the Story Map.

To do so, click on the list of projects and a window will pop up where you can select the project of your choice.
2.2.2. Add a new view for the storymap

- Click on the Toolbox icon and then click on **Create a new view** to add a view.

- **Type of view** → Click on the box “vector tiles” and select “Story”

- Give a name to your story in the text box **View title**
- Click on **Create**
2.2.3. Configuring the view created

Now that your Story Map file is created, you are able to edit the title, abstract and other details:

- In order to do this, you first need to visualize the view of your story map: click on the Views icon.

- The view of your story map is the first layer of the list
- Select the view of your story map by clicking on the blue button located on the left side
- In order to configure the view (e.g. the title, abstract etc. of your story map) click on Configure this view and a menu will open up.

In this menu, you can set a title and abstract and define access rights for the Story Map and categorize it by classes and collections.

2.2.3.1. Title and Abstract

- Click on view title
- Add an abstract to your story map: click on view abstract

2.2.3.2. Access rights
- **Other projects where the view is visible**: Determine here if the story map should be visible in additional projects to the one already selected. In other words, if you select a second project here, all the members of project 2 will also be able to see the story map (but not to edit it).
- **Read access groups**: define which groups are able to play/read the story map (see details in 2.2.4.)
- **Edit access groups**: define which groups are able to edit the story map (see details in 2.2.4.)

**2.2.3. Categorize the Story Map**

**Themes**: Different than classes explained above (components of each step in the story map), classes here can be thought of broadly as topics. There are 10 prefilled options – extractives; development; social; politics; environment; energy; infrastructure; stress; satellite images; other. Select one or more themes associated with your story map.

**Collections**: Select or type one or more keywords associated with your story map to subcategorize it.

NB: Views could be filtered by a ‘risk-assessment’ collection for instance, and views contained in this collection could be filtered by various themes, like 'Environment' (ex: Protected areas), Social (ex: Density of population) etc.

When you are done with the configuration of the Story Map, do not forget to press the save button on the bottom of the window before you exit the menu.

**NB**: If the save button is grey and cannot be clicked, it means that the title or the abstract hasn’t been filled. A red bar on the left side of the window will inform you what is the information missing.
2.2.4. Regulating reading and editing access to the story map

2.2.4.1. Reading access

Here you can define the groups that are able to play and read the story map. If you try and share your direct link with another user, they will not be able to access your story unless you have given them privileges or made the story map public.

- **Public**: Everyone can read the story map
- **Members**: Only members that are part of a same project can read the story map.
- **Publishers**: Only members who have publisher rights inside the project can read the story map.
- **Administrators**: Only the administrator(s) of the project is/are able to read the story map.

2.2.4.2. Editing access

Here you can define who can edit the story map. The roles attributed follow the same logic as the ones defined in the Reading access section, with two exceptions:

- Public users can't edit story maps.
- You can choose individual members of the project and assign them editing rights.
2.3. Add content to your story map

With the story map file created and the title, abstract and details added, you are now ready to start designing the story map.

- To edit the content of your story map, click on [Edit story] in the view menu. This will open the main menu to edit the story.

- From here on, this guide will take you step by step through all the possible functionalities of designing the content of the story map.

2.3.1. Define the resolution parameters of the story

First, you should choose the screen resolution of your story map:

- Click on the arrow ‘expand settings’
- Click in the box and choose the resolution of your choice

NB: The default parameters of the screen resolution are automatically set on 720p (16:9)

Recommendations:
- A low resolution is recommended if you use a low-resolution screen
- A high resolution is recommended if you use a high-resolution screen
- The most commonly used screen resolution is 720p and 1080p
2.3.2. Create a step

The step is the window containing your narrative, your pictures, etc. that support the map. It is basically chapter or slide (like in PowerPoint) of the Story Map. Typically, a story map has between 10-20 steps. To create a complete story map, you will have to repeat all the points from 2.3.2. until 2.5 for each step.

First you will have to create a new step:

- Select your story map in the list of layers and click on Edit story (see on 2.2.2.)
- Story → Steps → Click on +step
- Click on the arrow “expand the step”

Tip: It is recommended to create and title all the steps that you have planned for in your narrative at once.

To add a new step to build the rest of your story:

- Scroll down to the end of the window
- Click on +step to add a new step
- At the bottom of the dialogue box for each step, add the title.

Important:

- Remember to regularly save your draft story map by clicking on the Save Button on the bottom of the Story Map Design Menu.
- The Preview Button lets you see the what the story map will look like. This is especially useful when experimenting with different design solutions for the content you want to display.
**Overview of the Story Map Design Menu**

Once the step is created, you can expand the content design menu by clicking the small arrow.

A brief overview of all the functions of the content design menu:

Click on [+ Slide] to add a slide to the step. This is basically adding an element to the current slide of the story map (e.g. photo, text, video, etc.) For detailed description see 2.3.3.

Click on [+ View] to add data on the map (details see 2.4.)

Click on [Position of the map] to either manually enter the center coordinates and zoom of the map or (recommended) use the 'Update using current map parameter' to automatically set the map according to the current map position (details see 2.5.). This determines what geographic area is displayed on the map.

Click on [Map animation] to set the way of transitioning from one step to the next step of the story map (not necessary for the first step). (details see 2.6.)
Immediately after creating the step, give it a title to keep it organized. These titles can be edited at any time. As a story map typically has 10–20 steps, finding the step you want to edit becomes easier and will allow the reader to know where they are in your story. You can move your steps around by clicking the up and down arrows beneath each step title.

2.3.3. Create slides for the step

By creating slides (the building blocks of a step), you add content into the step of the story map. It is recommended to add one slide per content (e.g. title, text, photo, video, etc.). This is where the actual designing happens of how the Story Map will look like.

2.3.3.1. Content

Click on the arrow “expand the content” and enter the text of your narrative in the text box “Content”.

If you want to have text and images, you will need to add several slides. Each photo, section of text, or video requires a unique slide. (Details explained below).

- Click on + slide to add a new slide

Tip: To stay organized, title your step immediately after creating it (e.g. slide 1: photo; slide 2: text; etc.). The name of the slide can be added on the bottom of the ‘slide menu’. These titles can be edited at any time.
2.3.2 Properties of the slide

- **Text color**: click on the color bar to choose the color to be applied to the text.

- **Background color**: click on the color bar to choose the color to be applied to the background of the slide.

- **Background opacity**: click on the number in the box and define manually the opacity between 0 and 1.
  **NB**: “0” is totally transparent and “1” is totally opaque.

- **Text size**: click on the text size number in the box and define manually the size of the text.

  **Tip**: click regularly on [Preview] to visualize the changes you’re doing.

2.3.3 Location of the slide on the screen: slide classe

You can choose the placement of your text slide on the screen. This part is important if you have more than one slide on one step and can be complex at times. It is the part that defines where you position the content of your step, which is the ‘text slide’, the ‘photo slide’, the ‘video slide’, etc.

- **Step > Slide > Slide classes**
- **Click on the icon [Class]** to add a classe that defines the location of the slide

- **Click on the “name” box and select the pre-defined placement of your choice:**
<table>
<thead>
<tr>
<th>Name: Description</th>
<th>Screenshots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Card:</strong> add some margins to the slide</td>
<td><img src="image1.png" alt="Without image-cover class" /> <img src="image2.png" alt="With image-cover class" /></td>
</tr>
</tbody>
</table>
| **Image-cover:**  
  When inserting an image, and activating the image-cover class, the image will be displayed over the whole class. | ![Without image-cover class](image1.png) ![With image-cover class](image2.png) |

**Shadow:** add a shadow to a slide

**Text-center**  
Determines the alignment of the text within the classe. Note: this can also be changed when editing the text with the edition menu (under the blue pen).

**Text-left**  
Determines the alignment of the text within the classe. Note: this can also be changed when editing the text with the edition menu (under the blue pen).

**Text-right**  
Determines the alignment of the text within the classe. Note: this can also be changed when editing the text with the edition menu (under the blue pen).

**Titles-center**  
This class aligns all titles in the center of the class.
<table>
<thead>
<tr>
<th>Layout</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half-vertical-Center</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Half-horizontal-Center</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Combining Half-vertical-Center and Half-horizontal-Center</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Half-right</td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
</tbody>
</table>
Half-left

Half-top

Half-bottom

**Combination** of half-top and half-right:

You can combine half-top/half-bottom with half-left/half-right to place classe in the corner (quadrant) of your choice.
**NB:** you can create a new placement by *combining* existing propositions:

**Example 1:**
1. Add a new class by clicking again on + class
2. Select the other placement needed to create the placement of your choice
3. For instance:
   - First class: Half-right
   - Second class: Half-bottom
   → Result: Bottom-right

![Example Class Selection](image)

**Example 2:** If you wanted a text box (right justified text) to be visible with a semi-opaque white background only in the upper left-hand corner, you would select the following classe sequence:
   - First classe: shadow
   - Second classe: text-right
   - Third classe: half-top
   - Fourth classe: half-left

If you wanted this text to be over an image, you would add a separate slide (on the same step), making sure your image was the first slide within your step (insert something like this screen shot):

![Example Slides](image)

**Tips:**
- Photos look good when either placed in one of the quadrants or as a full-size image in the background
- Full screen titles look good with e.g. the half-horizontal-center class and a full-size image cover photo in the background.
- Adding the slide image-cover classe means that if you insert a photo, it will be displayed over the whole slide defined by the other classes. You can change the order of the image in the slide so that text is displayed on top using the arrows next to the slide number.
- The ‘text’ classes define the alignment of the text within the slide.

**NB:** How to add a photo or video to the slide will be explained under 2.3.3.5.
2.3.4. Editing the text content of slides

- Click on the “edit” button located on the top-right corner of the screen

- Move the mouse over the slide (a red framework with a highlighted background appears)
- Click on the text inside this framework and edit the text using the edit box that popped-up on the left side of the screen

Functions:

- Apart from the “italic” and “bold” modes, the styles are applicable to the framework containing the content, not to the content itself. The framework can be viewed as a paragraph, meaning styles are applicable to the entire paragraph. If you want to set different styles to different parts of the text, you shall split the paragraph into several sections by pressing Enter (the framework will besplit as well).

- By clicking on the Button H1, H2, H3, H4, H5 (header styles) and P (normal paragraph style) you can determine the size of the text

- The button ““ generates a pre-formatted style for quotations.

- The button </> generates a pre-formatted style for code.

- You can also determine the alignment (left, centered, right) of the text and add bullet points to the text.

When done with editing: Click on the green button located on the top-right corner of the screen to save the changes and return to the story map creation.
2.3.5. Add multimedia content

- Create a slide (see 2.3.3.), define its properties (see 2.3.3.2.) and its location on the screen (see 2.3.3.3.)
- Click on the “edit” button located on the top-right corner of the screen (see 2.3.3.4.)
- Move the mouse over the slide: a red framework with a highlighted background appears

To insert photos:

- Click inside this framework and click on the “image” button in the edit box
- Upload a photo from your computer then click on Insert

- Move the mouse over a corner of the image until the mouse pointer turns into a double arrow then click and adjust the size of the image by moving the mouse

- You can fine-tune the location of your image on the screen:
  1. Click on the “img” button located on the bottom-left corner of the screen
2. Select the placement of your choice

3. You can create a new placement by combining existing propositions. This is a way of ‘fine tuning’ the position of the photo selected by choosing the location of the slide (2.3.3.3.)

4. By enabling the ‘Image cover’ function, the photo will be displayed across the whole slide. (This step can also be done when creating the slide as described in 2.3.3.3.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin top 5%</td>
<td>Insert a small margin on top of the element (text, photo, video, etc.) that you insert.</td>
</tr>
<tr>
<td>Width 100%</td>
<td></td>
</tr>
<tr>
<td>Margin right 5%</td>
<td>Insert a small margin on the right of the element (text, photo, video, etc.) that you insert.</td>
</tr>
<tr>
<td>Margin left 5%</td>
<td>Insert a small margin on the left of the element (text, photo, video, etc.) that you insert.</td>
</tr>
<tr>
<td>Margin bottom 5%</td>
<td>Insert a small margin on the bottom of the element (text, photo, video, etc.) that you insert.</td>
</tr>
<tr>
<td>Margin top 10%</td>
<td>The same function as above, just with a 10% margin instead of 5%.</td>
</tr>
<tr>
<td>Margin right 10%</td>
<td></td>
</tr>
<tr>
<td>Margin left 10%</td>
<td></td>
</tr>
<tr>
<td>Margin bottom 10%</td>
<td></td>
</tr>
<tr>
<td>Align right</td>
<td>Aligns the text in the class to the right</td>
</tr>
<tr>
<td>Align left</td>
<td>Aligns the text in the class to the left</td>
</tr>
<tr>
<td>Center</td>
<td>Aligns the text to the center</td>
</tr>
<tr>
<td>Absolute top</td>
<td>This places the element (text, photo, video, etc.) to the absolute top, left, right or bottom of the class.</td>
</tr>
<tr>
<td>Absolute left</td>
<td></td>
</tr>
<tr>
<td>Absolute right</td>
<td></td>
</tr>
<tr>
<td>Absolute bottom</td>
<td></td>
</tr>
<tr>
<td>Absolute 50% top</td>
<td>This places the element (text, photo, video, etc.) on the absolute top of the lower half of the class. In other words, just below the middle of the class.</td>
</tr>
<tr>
<td>Absolute 50% left</td>
<td>This places the element (text, photo, video, etc.) on the absolute left of the right half of the class. In other words, just on the right of the middle of the class.</td>
</tr>
<tr>
<td>Absolute 50% right</td>
<td>This places the element (text, photo, video, etc.) on the absolute right of the left half of the class. In other words, just on the left of the middle of the class.</td>
</tr>
</tbody>
</table>
just on the left of the middle of the class.

| Absolute 50% bottom | This places the element (text, photo, video, etc.) on the absolute bottom of the upper half of the class. In other words, just above the middle of the class. |

To insert videos:

- Click inside this framework and click on the “video” button in the edit box
- Paste the link of a video in the URL box, then click on Insert

- You can choose the location of your image on the screen:
  1. Click on the “iframe” button located on the bottom-left corner of the screen
  2. Select the placement of your choice
  3. You can fine-tune the placement by combining existing propositions

2.3.3.1. Add a hyperlink

You may need to add a hyperlink in your narrative to refer to further information or to cite the data provider. To do so, select the text to attach the hyperlink to, and click on the “tie” icon. A text box appears above the text highlighted, paste the hyperlink of your choice, and click on the green button to validate your choice.
2.4. Activate views

This section shows you how to add spatial data that you have uploaded or that is publicly available in MapX in your story map. The data layers you can use to support the narrative of your story map are listed under the icon “views” in the story map design menu. For each step of the story map, you have the possibility to activate one or more data layers. Follow the steps below:

Steps → Views to activate → click on the arrow
- Click on the button [+ view] to activate a view “expand”

- Click on the “view” box and select the view to be displayed

You can also choose to show several views at the same time:
- Click again on the button [+ view] and add as many views as you want
- You can delete a selected view by clicking on the button \( \times \)

**NB:** When having multiple views activated, the data layers displayed on the map are stacked accordingly. (E.g. View 1 being the top layer and the View 2 being the bottom layer)
2.5. Background of the slide

This section shows you how to display a specific geographic area on the story map step. The default settings of the geographic coordinates of the map is on 0-0-0 (displaying the entire world map). If you want to display a specific area (e.g. the Iberian Peninsula), you must manually select the position of the map to show your data.

- Click on the lock icon (up – left) to unlock the map

- With your mouse, you can now zoom in, zoom out, and move the map as much as you want and select the area of your interest.

- Click again on the lock icon to lock the map

- To 'lock in' the map position you selected go to:
  1. Steps → Position of the map → click on the arrow to expand the menu
  2. Click on the double arrows icon "Update using current map parameters" to update the geographic coordinates of the map according to the map you see on your screen
  3. The geographic coordinates of your map appear automatically in the text boxes

**NB**: You can move the map as much as you want:

- **Zoom in/zoom out** with the mouse's scroll
- Right click while moving up and down to see the **map in 3D**
- Right click while moving left/right to **rotate the map**
2.6. Map animation

The 'Map animation' tool lets you choose the transition from one step to the next step of a story map. Important: the settings you put here apply to how you get to the current step. In other words, to customize the transition from the first to the second step, you will need to edit the map animation setting on Step 2.

**Animation duration**: the time it takes for the transition in millisecond [ms]. Thus, 1000ms are 1 second.

**Trajectory method**: this describes the kind of transition between the steps.

**Animation function** and **Animation function exponent**: these are additional settings you can experiment to personalize the map animation of your story map.
2.7. Final steps of creating a story map

The story map is built and ready to be viewed. After saving and closing the Story Map Design Menu, you can play it by clicking on the play button in the list of views.

2.7.1. How to share the story map

To share the story map, click on the share button, a window with all the sharing possibilities will pop up.

- Add another project here in which the Story Map will be visible.
- Generate a link to share the entire project: If you are sharing with users outside your project, make sure your story map is set to public, otherwise they will only see the MapX homescree when they click on the direct link.
- Generate a link to share the complete collection you tagged your story map with.
- Generate a link to share only the view of your choice. By default, the story map you’re working on is the view that would be shared, but you can delete it or add new ones if necessary
- Tick the “Auto start story” box to generate a URL allowing the story map to be shared and viewed by everyone.
- Copy this link to share the story map via email or social media.

2.7.2. How to delete the story map

If you wish to delete the story map, you can do so by clicking on the small bin icon in the list of views. A window will pop-up where you will need to confirm the removal of the story map.

NB: if a story map is shared in second project, and if you would like to delete the first project, make sure you unshare the story map with the second project so that it would no longer be visible.