

USER GUIDE Chapter 17 Using MiniBase

Schoolwires Academic Portal Version 4.2

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Introduction

ith the *MiniBase* (*Directories & Lists*) Premium Enhancement Module, you can create, manage and deploy searchable lists for use by visitors to your website. You might use *MiniBase* to create searchable lists such as:

- Directories of people:
 - o Staff by school, grade or subject
 - o Coaches
 - o Alumni
 - o PTA/PTO
 - School Board members
- Lists of places:
 - o Locations of district facilities and schools
 - o Locations of athletic events
 - Locations of field trips
- Lists of things:
 - o Athletic schedules
 - o Book lists
 - Guidance resources
 - o Homework assignments
 - Club meetings
 - o Professional development schedules

Exhibit 17-1 shows a teacher directory that is searchable by last name, school name and subject. If you were looking for all the teachers in Indigo High School, for instance, you would choose that from the School Name drop-down list and then click on the *Submit* button. The results would be a list similar to what you see in Exhibit 17-2. The list in Exhibit 17-2 is shown in a table view. When you create your *MiniBase*, you can choose to display the results of a search in either table view or list view. Exhibit 17-3 shows the results of the same search in list view.

Teachers This directory provid Last Name	es information for contacting all the teachers in the Indigo District.
School Name	All
Subject	All
submit	

Exhibit 17-1: Searchable Teacher Directory on end user website

Teachers This directory provides contact information for all teachers in the Indigo District.						
First Name	Last Name	School Name	Subject	School Phone Number	Email Address	Home Phone Number
Lyle	Kodak	Indigo HS	English	777-999-1001	<u>kodak@indigo.com</u>	777-875-8945
Chris	Miller	Indigo HS	Shop	777-999-1001	<u>cmiller@indigo.com</u>	777-785-6769
Back						

Exhibit 17-2: Search results in table view

н	
I	Teachers
I	This directory provides information for contacting all the teachers in the Indigo District.
I	
I	1. First Name: Lyle
I	Last Name: Kodak
I	School Name: Indigo HS
I	Subject: English
I	School Phone Number: 777-999-10001
I	Email Address: lkodak@indigo.com
I	2. First Name: Chris
I	Last Name: Miller
I	
I	School Name: Indigo HS
I	Subject: Shop
I	School Phone Number: 777-999-10001
I	Email Address: cmiler@indigo.com
I	
1	
1	Back
1	

Exhibit 17-3: Search results in list view

Accessing MiniBase

If your organization has purchased *MiniBase*, the *Directories & Lists* (*MiniBase*) task will appear on both the *Tools* tab and the *Tools* drop-down menu in the *Site* and all *Subsite Workspaces*. (See Exhibits 17-4 and 17-5.)

	1	etting Started 🔞 Edit Homepage and Calendar 🍇 User Management 🏄 Tools 🎉 Configure
	Use thi site.	ese advanced and premium features to enhance the form and functionality of your Choose a quick task 💌
		Files & Folders Organize the files and folders used in your site and Shared Library.
	0	Web Address Mappings Create and maintain friendly URLs for your site.
		Site Templates (Styler®) Maintain the active template and the template library for your site.
		Broadcast Alerts (E-Alerts) Add or edit Broadcast E-Alerts that are used on your site.
	(V)	Forms & Surveys Create or dissurge forms and surveys for your file
<	B	Directories & Lists (MiniBase) Create and manage directories and lists for use on your site.
	2	Photo Gatternes Create and manage photo galleries for use on your site.
		Page Layouts Create and manage page layouts that are used on your site.
	B	Section Robot Add or import sections, using specific page layouts and unique section configurations.
	0	Content Routing Maintain content routing for your site. This includes maintaining routing profiles and routing options, and viewing the routing queue.
	h	Site Reports View your site's reports.

Exhibit 17-4: Tools tab with MiniBase in Site Workspace

	Tools		
	🇞 File:	s & Folders	
	🚳 Wel	b Address Mappings	١.
	🚵 Site	Templates (Styler)	
	🥙 Bro	adcast Alerts (E-Alerts)	
	😥 For	ms & Surveys	
4	ᢙ Dire	ectories & Lists (MiniBase)	D
	🔝 Pag	e Layouts	
	🍓 Sec	tion Robot	
	🤞 Pho	to Galleries	ι.
	🍪 Сог	itent Routing	
	h Site	Reports	ι.

Exhibit 17-5: Tools drop-down menu with MiniBase in Site Workspace

For the *Directories & Lists (MiniBase*) task to appear on the *Tools* tab or *Tools* drop-down menu in *Section Workspaces*, your organization must have purchased the *MiniBase* Premium Enhancement Module and a Site Director or Subsite Director must have enabled it for those *sections*. See Chapter 6: "Channel Workspace" and Chapter 15: "Section Management" for more information on how this is done.

Creating a New List

In order to create a new directory or list for use on your website, you must:

- 1. Create and configure the list.
- 2. Add records to the list.
- 3. Deploy the list.

Creating and Configuring the List

To add a new list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-6 will display.

Home > Manage Directories & Lists	Home > Manage Directories & Lists			
New List				
Manage Directories & Lis Existing directories and lists are show	ts n below.			
Title	Description			
There are no directories to list.				

Exhibit 17-6: Manage Directories & Lists window

3. Click on the *New List* button on the top left of the window. A *New List* window like the one shown in Exhibit 17-7 will display. Notice it opens on the *General* tab.

Ente	r list information be	ow.	
1	General Fields		
All fie	elds marked with an ast	erisk (*) are required.	
Tit	le: *		
De	scription:		
	scription.		
Di	- 20		
	isplay Format:	O List View	2
	isplay Format:	Last Name: Doe First Name: John	Previews of two
	Isplay Format: Table View	Last Name: Doe First Name: John Building: High School	Previews of two display formats fo
	Isplay Format: Table View	Last Name: Doe First Name: John	Previews of two
	isplay Format: Table View Last Name First Name Doe John Doe Jane	Last Name: Doe First Name: John Building: High School Last Name: Doe First Name: Jane	Previews of two display formats fo
	isplay Format: Table View Last Name First Name Doe John Doe Jane	Last Name: Doe First Name: John Building: High School Last Name: Doe First Name: Jane	Previews of two display formats fo
	isplay Format: Table View Last Name First Name Doe John Doe Jane	Last Name: Doe First Name: John Building: High School Last Name: Doe First Name: Jane	Previews of two display formats fo

Exhibit 17-7: New List window on General tab

- a. Enter a title for the list (required).
- b. Enter a description for the list if (optional).
- c. Click in the radio button to the left of the display format you wish to use when the directory or list displays on the end user website. Notice the previews of the two display formats that are available for the end user website. (See also Exhibit 17-2 and Exhibit 17-3.) The default setting is Table View.

/ List list information below. General Fields				
Field Name	Display Roles	Filter Type	Sort Type	Sort Order
	Edit Roles	None 🖌	None 🖌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 🖌	None 💌
	Edit Roles	None 🖌	None 💌	None 💌
	Edit Roles	None 🖌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 🖌	None 💌

Exhibit 17-8: New List window on Fields tab

- 4. Click on the *Fields* tab. The *Fields* tab will display as shown in Exhibit 17-8. Here you will configure your searchable list or directory. You will indicate which fields will be searchable, how users will be able to search these fields, the order in which the results of the search will display and whether the field will be viewable by everyone.
 - a. <u>Field Name</u>: Enter the name of the data field in your list. Beginning with **Academic Portal** 4.2, a field name can have up to 255 characters.
 - b. <u>Edit Roles button</u>: When you click on this button, a *Roles* window like the one shown in Exhibit 17-9 will display. Notice the only role selected is the default role of General Public. This means that any visitor to your website will be able to see the information contained in this field. If this is acceptable, you do not need to do anything. If, however, you wish this information to display for specific users only, you will need to assign roles to that field. If you were creating a teacher directory, for instance, you might limit viewing of teachers' home phone numbers to Administrators.



Exhibit 17-9: Roles window

To limit who can view the information in a field:

- i. Deselect each role you do not want to be able to view the information in this field by clicking in the checkbox to the left of that role. In the example, you would deselect General Public for the Home Phone Number field.
- ii. Select each role you want to be able to view the information in this field by clicking in the checkbox to the left of that role. In the teacher directory example, you would select only the Administrators role for the Home Phone Number field.
- iii. Click the OK button.
- c. <u>Filter Type</u>: To make a field searchable, you will need to enter a Filter Type. You can choose from:
 - i. *None*: This is the default and it means that field will not be searchable. For a teacher directory, for instance, you may not need the first name to be searchable.
 - ii. *Free Form*: This means that a visitor may enter a letter or letters to search for an item. It is useful when you have a large number of records to search. For instance, in the Teacher Directory example, you might choose this filter type for the last name rather than having a long drop-down list appear in the directory.
 - iii. *Drop-Down*: This means that the visitor may choose from a list of items for the search. This type of filter is generally applied

when you have a short list of records. In the teacher directory example, it might be the schools.

<u>Note</u>: The filters you enter here also affect the filters available on the *Manage Records* window.

- d. <u>Sort Type</u>: This determines the order in which each field will display in the search results on the end user website. Your choices are:
 - i. Ascending order (i.e., lowest to highest, A to Z)
 - ii. Descending order (i.e., highest to lowest, Z to A)
- e. <u>Sort Order</u>: This determines the order in which the fields will display in the search results on the end user website. In the teacher directory example, you might have it display by school first, then by subject and finally by teachers' last names.
- 5. Click on the *Save* button. The *Manage Directories & Lists* window will return as the active window.

Adding Records to the List

Once you have configured your list, you will add the data records for that list. You can add records two ways:

- Add records one at a time.
- Import records.

Adding Records One at a Time

To add records one at a time:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-10 will display.

me > Manage Directories	& Lists				
New List Im	port List				्रि Tutorials
Manage Directori Existing directories and lis					
Athletic Schedule's	•	Records Edit	URL T/	AG Export	Delete
Sports		Records Edit	URL TA	AG Export	Delete
Staff Directory	List of Staff	Records Edit	URL T/	AG Export	Delete
Super Dogs in my life		Records Edit	URL Ta	AG Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records	URL T/	AG Export	Delete

Exhibit 17-10: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list to which you want to add a record. A *Manage Records* window like the one shown in Exhibit 17-11 will display.

Home > Manage Directories & New Record Filter: Enter the field and click Filter	Import Export	P	urge All ar Reset		
Sport	Date		Game or Practice	Location	
There are no record	s to display.				
Page: 1 GO of	1				< < > >

Exhibit 17-11: Manage Records window

4. Click on the *New Record* button at the top left of the window. A *New Record* window like the one shown in Exhibit 17-12 will display. The fields that are in the *New Record* window will be the same as the ones you entered when you created the list or directory.

Home > Manage Directories & Lists > Manage Records > New Record
New Record Enter the information below to create a new record.
First Name
Last Name
School Name
Subject
School Phone Number
Email Address
Home Phone Number
Save Cancel

Exhibit 17-12: New Record window

- 5. Enter the information for that record.
- 6. Click on the *Save* button. The *Manage Records* window will return as the active window. The record you entered will display in the list of records.

Importing Records

There are two steps to importing records:

- Create the Comma Separated Value (CSV) file.
- Import the CSV file.

Creating the CSV File

You can create a CSV file using a text editor like Microsoft[®] Notepad or you can create one using Microsoft[®] Excel. If you use Excel to create the file, be certain to save it as a CSV file rather than an Excel file.

<u>Note</u>: If you are using a Macintosh® computer, when you save the Excel file, you must save it as a CSV (Windows) rather than CSV (comma delimited) because the Mac® handles returns differently.

Some important notes on the CSV file:

- The fields in the CSV file must correspond to the fields you created for the list.
- The fields in the CSV file must be in the same order as the fields in the list.
- The field names must comprise the Header Row in the CSV file.

Exhibit 17-13 is a sample CSV file for importing a list of records with the fields shown in Exhibit 17-12.

ľ		A	В	С	D	E	F	G	Н
I	1	FirstName	LastName	SchoolName	Subject	SchoolPhoneNu	EmailAddress	HomePhor	neNumber
I	2	Scott	Stevens	Indigo MS	Blue Team Science	777-999-1001	sstevens@indigo.com	777-865-49	932
I	3	Mary Beth	Rogers	Indigo District	Superintendent	777-999-1001	mrogers@indigo.com	777-858-67	/04

Exhibit 17-13: Sample CSV file

Importing the Records

To import records after you have created the CSV file:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-14 will display.

Home > Manage Directories &	Lists						
New List Impo	New List Import List						ा Tutorials
Manage Directorie Existing directories and lists							
Title	Description						
Athletic Schedule's		Records	Edit	URL	TAG	Export	Delete
Sports		Records	Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records	Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records	Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records	dit	URL	TAG	Export	Delete

Exhibit 17-14: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list to which you want to import records. A *Manage Records* window like the one shown in Exhibit 17-15 will display.

Home > Manage Directories 8	a Lists > Manage Records							
	Import xport.	Pu	rge All Reset					
Sport	Date	0	ame or Practice	Location				
There are no recor	There are no records to display.							
Page: 1 GO c	f 1				< < > >			

Exhibit 17-15: Manage Records window

4. Click on the *Import* button at the top of the window. Step 1 of the *Import* wizard as shown in Exhibit 17-16 will display.



Exhibit 17-16: Step 1 of the Import wizard

- 5. Click on the *Browse* button. Browse your computer for the CSV file you created.
- 6. Select the CSV file you created.
- 7. Click on the *Next* button. Step 2 of the *Import* wizard as shown in Exhibit 17-17 will display. You can now preview your imported records and cancel the import if desired.

77 ns@indigo.com 865 493
77 rs@indigo.com 858 670

Exhibit 17-17: Step 2 of Import wizard (Preview the file)

8. Click on the *Next* button. You will get a message saying your file is uploading. When the import is completed, a *Successful Import* window like the one shown in Exhibit 17-18 will display.

Successful Import The file has been processed and the records have been added to the list.
TeacherOne.csv has been successfully processed.
Finish

Exhibit 17-18: Successful Import window

9. Click on the *Finish* button. The *Manage Records* window will return as the active window. The records you imported will be in the *MiniBase*.

Limit on Number of Records

Beginning with Academic Portal 4.2, your organization will have an upper limit to the number of records it can store in each *MiniBase*. This is necessary in order to conserve storage space. This limit is entered by Schoolwires.

Effects in Manage Records Window

When a *MiniBase* is approaching the number of records it can have, a message like the one shown in Exhibit 17-19 will display in the *Manage Records* window.



Exhibit 17-19: Message when approaching upper limit for records

When a *MiniBase* has reached the upper limit for the number of records, a message like the one shown in Exhibit 17-20 will display in the *Manage Records* window.

Notice that the *Add Record* and *Import Records* buttons do not display within the *Manage Records* window once the *MiniBase* reaches this maximum number.

Export Pr	urge All						
Export Pt							
Ca The maximum	number of records that c	an be added to this MiniBa	ise has been reached. Please	contact your			
Site Administr	ator to review the need f	or additional licensing.		contact your			
lter:							
ilter: hter the field and click Filte	er for a filtered list of records.						
	er for a filtered list of records.	Filter Reset					
	er for a filtered list of records.	Filter Reset					
	er for a filtered list of records.	Filter Reset School Name	Subject				
nter the field and click Filte			Subject Superintendent	Edit Delete			
hter the field and click Filte	Last Name	School Name	-	Edit Delete Edit Delete			

Exhibit 17-20: Message when at upper limit for records

Effects on Importing Records

If an import will exceed the upper limit for the number of records for the *MiniBase*, all records in the CSV file will not be imported. A message like the one shown in Exhibit 17-21 will display in Step 2 of the Import Wizard (Preview the file).



Exhibit 17-21: Message displays in file preview when import will exceed limit

Deploying the List

After you have created your directory or list, you need to deploy it. You will deploy a list by either:

- Inserting it as a link
- Using the Tag to embed it on a *page*

The method you choose to deploy a list will depend on where you created the list and on what type of *page* you wish the list to display. The three deployment methods are:

- On *Overview* and *Flex Pages*, use the icon in the **Schoolwires Editor** as shown in Exhibit 17-19.
- On other *page* types or to deploy a list that was not created in that workspace:
 - Insert the Tag for the list.
 - Insert the URL for the list.

Using the Icon in the **Schoolwires Editor**

To deploy a list on an Overview or *Flex Page* within the *section* in which it was created:

1. Click on the Page Name of the *Overview* or *Flex Page*. A **Schoolwires Editor** like the one shown in Exhibit 17-22 will display.



Exhibit 17-22: Schoolwires Editor

2. Click on the *Insert Directory* icon in the **Editor**. An *Insert Directory* wizard like the one shown in Exhibit 17-23 will display.

Insert Directory Wizard Select the Directory you would like	e to display.
Directory: Book List 🕶 <	Drop-down list of lists in section
	Insert Directory Cancel

Exhibit 17-23: Insert Directory wizard

- 3. Choose the directory you wish to insert from the drop-down list.
- 4. Click the *Insert Directory* button. The **Schoolwires Editor** will return as the active window. The Tag for the directory will display within the **Editor**.
- 5. Click the *Save* button in the **Editor**. If that *page* is active, you can view the change on the end user website.

Deploying a Directory on Other Page Types or Outside the Creation Workspace

If you wish to deploy the directory or list either on a *page* that does not have the *Insert Directory* icon or on a *page* that is not within the workspace in which you created it, you can either use the Tag (code) for the list or use the URL for the list.

Using the Tag to Deploy a Directory

To deploy a directory using the Tag code:

- 1. Access the *Site*, *Subsite* or *Section Workspace* in which the directory or list was created.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-24 will display.

> Manage Directories (k Lists			
New List Imp	ort List			j Tutorials
anage Directori sting directories and list Title				
Athletic Schedule's		Records Edit	URL TAG.	Export Delete
Sports		Records Edit	URL TAG.	Export Delete
Staff Directory	List of Staff	Records Edit	URL TAG.	Export Delete
Super Dogs in my life		Records Edit	URL TAG.	Export Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records Edit	URL TAG.	Export Delete

Exhibit 17-24: Manage Directories & Lists window

3. Click on the *TAG* button to the right of the directory you wish to deploy. A *Script Prompt* window like the one shown in Exhibit 17-25 will display.

Script Prompt:	ОК
Below is the Tag code for the list. Please Copy and Paste the text below and insert into the desired page.	Cancel
[\$DIRECTORY ID=83\$]	

Exhibit 17-25: Script Prompt window for Tag

- 4. Highlight and copy the Tag code using your keyboard shortcut.
- 5. Navigate to the *page* on which you wish to deploy the directory.
- 6. Paste the Tag code into the *page*. If that *page* is active, you can view the change on the end user website.

Using the URL to Deploy a Directory

To deploy a directory using the URL:

- 1. Access the *Site*, *Subsite* or *Section Workspace* in which the directory or list was created.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-26 will display.

> Manage Directories	& Lists					
New List Imp	oort List					्रि Tutorials
lanage Directori isting directories and lis Title						
Athletic Schedule's		Records Edit	URL	TAG	Export	Delete
Sports		Records Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the	Records Edit	URL	TAG	Export	Delete

Exhibit 17-26: Manage Directories & Lists window

3. Click on the *URL* button to the right of the directory you wish to deploy. A *Script Prompt* window like the one shown in Exhibit 17-27 will display.

Script Prompt:	ОК
Below is the URL for the selected list. Please copy this URL by using your keyboard shortcut:	Cancel
http://ap4sp1.schoolwires.com/128610427123419693/FlexBase/FlexBase.asp1	PirectoryID=83

Exhibit 17-27: Script Prompt window for URL

- 4. Highlight and copy the URL using your keyboard shortcut.
- 5. You can paste this URL as a link either in the **Editor** on the desired *page* or within *Site Shortcuts* or *Section Hierarchy*. If the *page* or hierarchy in which you deployed the directory is active, you can view it on the end user website.

The Directory or List on the End User Website

Once you deploy the directory or list on an active *page* on the end user website, visitors to the website will see a searchable list like the one shown in Exhibit 17-28.

Staff Directory List of Staff
First Name
Last Name
Email Address
Homeroom
submit

Exhibit 17-28: Searchable list on end user website

The search results will display either in a table view as shown in Exhibit 17-29 or a list view as shown in Exhibit 17-30. You set the display format option on the *General* tab when you add a new list or edit an existing list. See Exhibit 17-31.

Staff Directory			
First Name	Last Name	Email Address	Homeroom
Dave	Long	dlong@schoolwires.com	214
Eddie`	Munster	munster@munster.com	232
Back			

Exhibit 17-29: Search results displayed in table view

	aff Directory of Staff
1.	First Name: Dave Last Name: Long Email Address: <u>dlong@schoolwires.com</u> Homeroom: 214
2.	First Name: Eddie` Last Name: Munster Email Address: <u>munster@munster.com</u> Homeroom: 232
Ba	ack

Exhibit 17-30: Search results displayed in list view

Edit List Options Enter list information below. General Fields Title: * Staff Directory Description: List of Staff	
Display Format: Table View Uast Name First Name Doe John Doe Jack Doe Jack C List View Last Name: John Building: High School	Set display format options here.
Save Cancel	

Exhibit 17-31: General tab: set display options

Working with Directories and Lists

Editing a List

To edit a directory or list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-32 will display.

New List Imp Manage Directories Manage Directories Existing directories and list	es & Lists					Tutorials
Title	Description					
Athletic Schedule's		Records Edit	URL	TAG	Export	Delete
Sports		Records Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records Edit	URL	TAG	Export	Delete

Exhibit 17-32: Manage Directories & Lists window

3. Click on the *Edit* button to the right of the list you wish to edit. An *Edit List Options* window like the one shown in Exhibit 17-33 will display.

Edit List Options Enter list information below General Fields		
Title: * Staff Directory Description:		-
List of Staff Display Format: Table View List Name Fire Name Doe Jame Doe Jame Doe Jame Doe Jack	C List View Last Name: Don Fri Manger (an Building: Jap School Last Name: John Building: High School Building: High School	•)
Save Cancel		

Exhibit 17-33: Edit List Options window

- 4. Make the desired changes on the *General* tab or the *Fields* tab.
- 5. Click on the *Save* button. If the directory or list was deployed on an active *page*, you can view the changes on the end user website.

<u>Note</u>: If you add a field and do not add data for that field to the records, that field will be blank on the end user website.

Managing the Records within a List

You can:

- Edit a single record in a list.
- Export all the records from a list.
- Purge all the records from a list.

Editing a Record

To edit a record within a directory or list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-34 will display.

Home > Manage Directories & Lis	sts					
New List Import	List					ر آutorials
Manage Directories Existing directories and lists ar						
-						
Title	Description					
Athletic Schedule's		Records Edit	URL	TAG	Export	Delete
Sports		Records Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records idit	URL	TAG	Export	Delete

Exhibit 17-34: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list that contains the record you want to edit. A *Manage Records* window like the one shown in Exhibit 17-35 will display.

New Record	Import Expo	t Purge All		
er: r the field and click Filte	er for a filtered list of records.	Filter Reset	Field Filter	
First Name	Last Name	School Name	Subject	
Chloe	Craig	Indigo District	Administration	Edit Delete
Mary Beth	Rogers	Indigo District	Superintendent	Edit Delete
Blanche	Richards	Indigo ES	Art	Edit Delete
Steve	Lamar	Indigo ES	Kindergarten	Edit Delete
Carl	LoLomia	Indigo ES	Kindergarten	Edit Delete
Betsy	Brown	Indigo ES	Library	Edit Delete
<en< td=""><td>Higgins</td><td>Indigo ES</td><td>Third Grade Math</td><td>Edit Delete</td></en<>	Higgins	Indigo ES	Third Grade Math	Edit Delete
_yle	Kodak	Indigo HS	English	Edit Delete
Ihris	Miller	Indigo HS	Shop	Edit Delete
Tom	Haring	Indigo MS	Blue Team English	Edit Delete
Scott	Stevens	Indigo MS	Blue Team Science	Edit Delete
(UCCC)	Collins	Indigo MS	Math and Science	

Exhibit 17-35: Manage Records window

- Click on the *Edit* button to the right of the record you want to edit. An *Edit Record* window like the one shown in Exhibit 17-36 will display. <u>Note</u>: You can use locate the record by:
 - Using the *Field* filter at the top of the window.
 - Using the *Go* button at the bottom left of the window to get to a certain page. Enter the page number and click the *Go* button. That page of records will display.
 - Using the arrows at the bottom right of the window to move through the list of records one page at a time or move to the first or last page of records.

Home > Manage Directories & Lists	> Manage Records > Edit Record
Edit Record Edit record information belo	JW.
First Name	Chloe
Last Name	Craig
School Name	Indigo District
Subject	Administration
School Phone Number	777-999-1001
Email Address	ccraig@schoolwires.com
Home Phone Number	777-878-1093
Save Cancel	

Exhibit 17-36: Edit Record window

- 5. Make the desired changes to the record.
- 6. Click on the *Save* button. The *Manage Records* window will return as the active window. If the directory or list was deployed on an active *page*, you can view the information for the record you just edited on the end user website.

Exporting Records

To export the records from a list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-37 will display.

e > Manage Directories (& Lists						
New List Imp	port List						्रि Tutorials
Manage Directori xisting directories and list	ts are shown below.						
Title	Description						
Athletic Schedule's		Records	Edit	URL	TAG	Export	Delete
Sports		Records	Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records	Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records	Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the	Records	idit	URL	TAG	Export	Delete

Exhibit 17-37: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list that contains the record you want to export. A *Manage Records* window like the one shown in Exhibit 17-38 will display.

New Record Import Export Purge All						
er the field and click Filter for a filtered list of records. Filter Reset						
First Name	Last Name	School Name	Subject			
Chloe	Craig	Indigo District	Administration	Edit Del		
Mary Beth	Rogers	Indigo District	Superintendent	Edit Del		
Blanche	Richards	Indigo ES	Art	Edit Del		
Steve	Lamar	Indigo ES	Kindergarten	Edit Del		
Carl	LoLomia	Indigo ES	Kindergarten	Edit Del		
Betsy	Brown	Indigo ES	Library	Edit Del		
Ken	Higgins	Indigo ES	Third Grade Math	Edit Del		
Lyle	Kodak	Indigo HS	English	Edit Del		
Chris	Miller	Indigo HS	Shop	Edit Del		
Tom	Haring	Indigo MS	Blue Team English	Edit Del		
Scott	Stevens	Indigo MS	Blue Team Science	Edit Del		
Yugeen	Collins	Indigo MS	Math and Science	Edit Del		

Exhibit 17-38: Manage Records window

4. Click on the *Export* button on the top of the window. A *File Download* window like the one shown in Exhibit 17-39 will display.



Exhibit 17-39: File Download window

 Click on the *Save* button to save the export file to your computer and open it in Excel or click on the *Open* button to open it in Excel immediately. <u>Note</u>: You can change the system-generated file name after you have saved the file.

Deleting a Record

To delete a record from a list or directory:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-40 will display.

Home > Manage Directories & Li	sts						
New List Impor	t List						्रि Tutorials
Manage Directories Existing directories and lists and							
Title	Description						
Athletic Schedule's		Records	Edit	URL	TAG	Export	Delete
Sports		Records	Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records	Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records	Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records	idit	URL	TAG	Export	Delete

Exhibit 17-40: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list that contains the record you wish to delete. A *Manage Records* window like the one shown in Exhibit 17-41 will display.

New Record	Import Expo	rt Purge All		
First Name	Last Name	School Name	Subject	
Chloe	Craig	Indigo District	Administration	Edit Delet
Mary Beth	Rogers	Indigo District	Superintendent	Edit Delet
Blanche	Richards	Indigo ES	Art	Edit Delet
Steve	Lamar	Indigo ES	Kindergarten	Edit Delet
Carl	LoLomia	Indigo ES	Kindergarten	Edit Delet
Betsy	Brown	Indigo ES	Library	Edit Delet
Ken	Higgins	Indigo ES	Third Grade Math	Edit Delet
Lyle	Kodak	Indigo HS	English	Edit Delet
Chris	Miller	Indigo HS	Shop	Edit Delet
Tom	Haring	Indigo MS	Blue Team English	Edit Delet
Scott	Stevens	Indigo MS	Blue Team Science	Edit Delet
Yugeen	Collins	Indigo MS	Math and Science	Edit Delet

Exhibit 17-41: Manage Records window

4. Click on the *Delete* button to the right of the record you wish to delete. A *Delete* confirmation dialog box like the one shown in Exhibit 17-42 will display.



Exhibit 17-42: Delete confirmation dialog box

5. Click the *OK* button. The *Manage Records* window will refresh. The record you deleted will no longer display on the list or on the end user website.

Purging Records

There may be times when you wish to delete (i.e., purge) all the records in a list or directory, but retain the fields. For example, you might want to purge all the athletic events for a season. You could then import athletic events for the next season.

Warning: Purging records means deleting **ALL** the records from your *MiniBase* list or directory. Be absolutely certain this is the action you wish to take.

To purge all the records from a list or directory:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-43 will display.

New List Imp	port List						أي Tutorial
1anage Directori (isting directories and list	ts are shown below.						
Title	Description						
Athletic Schedule's		Records	Edit	URL	TAG	Export	Delete
Sports		Records	Edit	URL	TAG	Export	Delete
	List of Staff	Records Records	Edit Edit	URL	ТАG ТАG	Export Export	Delete Delete
Sports	List of Staff						

Exhibit 17-43: Manage Directories & Lists window

3. Click on the *Records* button to the right of the list that contains the record you want to purge. A *Manage Records* window like the one shown in Exhibit 17-44 will display.

New Record	Import Expor	t Purge All			
ilter: nter the field and click Filte	r for a filtered list of records.	Filter Reset			
First Name	Last Name	School Name	Subject		
Chloe	Craig	Indigo District	Administration	Edit	Delete
Mary Beth	Rogers	Indigo District	Superintendent	Edit	Delet
Blanche	Richards	Indigo ES	Art	Edit	Delete
Steve	Lamar	Indigo ES	Kindergarten	Edit	Delet
Carl	LoLomia	Indigo ES	Kindergarten	Edit	Delete
Betsy	Brown	Indigo ES	Library	Edit	Delet
Ken	Higgins	Indigo ES	Third Grade Math	Edit	Delete
Lyle	Kodak	Indigo HS	English	Edit	Delete
Chris	Miller	Indigo HS	Shop	Edit	Delete
Tom	Haring	Indigo MS	Blue Team English	Edit	Delet
Scott	Stevens	Indigo MS	Blue Team Science	Edit	Delete
Yugeen	Collins	Indigo MS	Math and Science	Edit	Delete

Exhibit 17-44: Manage Records window

4. Click on the *Purge All* button at the top right of the window. A *Purge* confirmation dialog box like the one shown in Exhibit 17-45 will display.



Exhibit 17-45: Purge confirmation dialog box

5. Click the *OK* button. The *Manage Records* window will refresh. There will be **NO RECORDS** in the window. It will look like the window shown in Exhibit 17-46.

me > Manage Directories	& Lists > Manage Records		
New Record	Import Export Purge All		
Filter: Enter the field and click Filt	ter for a filtered list of records.		
Enter the field and click Filt	ter for a filtered list of records.		
Enter the field and click Filt			
Enter the field and click Filt		Location	
Enter the field and click Filt	Filter Reset Date Game or Practice	Location	
Enter the field and click Filt Sport	Filter Reset Date Game or Practice rds to display.	Location	

Exhibit 17-46: Manage Records window after purge

Exporting/Importing List Configurations

The configuration of a list is the information you entered when you created or edited the list. It includes the information on the *General* tab as well as the *Fields* tab as shown in Exhibits 17-47 and 17-48.

If you wish to use the configuration of a list to create another like it, beginning with AP4.2, you may export that configuration and import it as a new list. No records will be exported or imported with the configuration.

In addition, you will be able to import MiniBase configurations that **Schoolwires** makes available.

Home > N	1anage Directories & Lists	> Edit List Configuration	
	: List Options list information below.		
C	General Fields		
All fie	lds marked with an asterisk i	(*) are required.	
Des This Di	cription:	Intact information for all teachers in the In	diqo District. 📑
	Last Name First Name Doe John	Last Name: Doe First Name: John Building: High School	
	Doe Jane Doe Jack	Last Name: Doe First Name: Jane Building: High School	
Sa	ve Cancel		

Exhibit 17-47: List Configuration: General tab

t List Options r list information below.				
General Fields				
Field Name	Display Roles	Filter Type	Sort Type	Sort Order
First Name	Edit Roles	None 🖌	None 💌	None 💌
Last Name	Edit Roles	Free Form 💌	Ascending 💌	3 💌
School Name	Edit Roles	Drop Down 💌	Ascending 💌	1 💌
Subject	Edit Roles	Drop Down 💌	Ascending 💌	2 💌
School Phone Number	Edit Roles	None 🖌	None 💌	None 💌
Email Address	Edit Roles	None 💌	None 💌	None 💌
Home Phone Number	Edit Roles	None 💌	None 💌	None 💌
Section	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🖌	None 🖌	None 🚩
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 💌	None 🖌	None 💌
	Edit Roles	None 💌	None 💌	None 💌
	Edit Roles	None 🔽	None 🔽	None 🔽

Exhibit 17-48: List Configuration: Fields tab

Exporting a List Configuration

To export the configuration of a list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-49 will display.

Home > Manage Directories & L	ists					
New List Impo	rt List					Tutorials
Manage Directories Existing directories and lists						
Title	Description					
Athletic Schedule's		Records Edit	URL	TAG	Export	Delete
Sports		Records Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records Edit	URL	TAG	Export	Dilete

Exhibit 17-49: Manage Directories & Lists window

- 3. Click on the *Export* button to the right of the list with the configuration you wish to export.
- 4. A *File Download* window like the one shown in Exhibit 17-50 will display. <u>Note</u>: The SWE file type is a **Schoolwires** export file.



Exhibit 17-50: File Download window

- 5. Click the *Save* button. Browse your computer for the location in which you wish to save the file.
- 6. Click the Save button. A Download Complete window will display.
- 7. Close the *Download Complete* window.

Importing a List Configuration

To import the configuration of a list:

- 1. Access the *Site*, *Subsite* or *Section Workspace* into which you wish to import the list configuration.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-51 will display.

Mew List Imp Manage Directoria Manage Directori Existing directories and list	es & Lists					्रि Tutorials
Title	Description					
Athletic Schedule's		Records Edit	URL	TAG	Export	Delete
Sports		Records Edit	URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Edit	URL	TAG	Export	Delete
Super Dogs in my life		Records Edit	URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records Edit	URL	TAG	Export	Delete

Exhibit 17-51: Manage Directories & Lists window

3. Click on the *Import List* button at the top of the window. Step 1 of the *Import List* wizard like the one shown in Exhibit 17-52 will display.



Exhibit 17-52: Step 1 of Import List wizard

4. Click on the *Browse* button. Browse your computer until you locate the file you wish to import.

<u>Note</u>: It must be a file with an SWE extension, either one you exported or one you downloaded from **Schoolwires**.

- 5. Highlight the file.
- 6. Click the *Open* button. Step 1 of the *Import List* wizard will return as the active window. The file path for the file you chose will display.
- 7. Click the *Next* button. You will get a message saying your file is uploading. When the import is completed, a *Successful Import* window like the one shown in Exhibit 17-53.

Successful Import The file has been processed and the MiniBase has been added.	
Sports.swe has been successfully processed.	
	Finish

Exhibit 17-53: Successful Import window

8. Click the *Finish* button. The *Manage Directories & Lists* window will return as the active window. The list you just imported will display. It will contain no records.

Deleting a List

If you will no longer use the records or the fields in a directory or list, you will probably delete the list rather than purge the records.

To delete a directory or list:

- 1. Access your Site, Subsite or Section Workspace.
- 2. Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu. A *Manage Directories & Lists* window like the one shown in Exhibit 17-54 will display.

Home > Manage Directories & Lis	ts					
New List Import	List					反 Tutorials
Manage Directories Existing directories and lists are						
Title	Description					
Athletic Schedule's		Records Ed	lit URL	TAG	Export	Delete
Sports		Records Ec	lit URL	TAG	Export	Delete
Staff Directory	List of Staff	Records Ed	lit URL	TAG	Export	Delete
Super Dogs in my life		Records Ec	lit URL	TAG	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records Ed	lit URL	TAG	Export	Delete

Exhibit 17-54: Manage Directories & Lists window

3. Click on the *Delete* button to the right of the list you wish to delete. A confirmation window like the one shown in Exhibit 17-55 will display.

2	Are you sure you want to delete this list? Doing this will delete all content for this list.
	OK Cancel

Exhibit 17-55: Delete list confirmation dialog box

4. Click the *OK* button. The *Manage Directories & Lists* window will refresh. The list you just deleted will no longer display in **Site Manager** or on the end user website.

<u>Note</u>: When you delete a directory or list, you must remove the tag or URL from the page on which you deployed it. We also recommend that you delete the *page* or deactivate it until you are ready to use it once more.