⊚schoolwires®

USER GUIDE
Chapter 5
Site Manager—Site/Subsite Workspace

Schoolwires Academic Portal
Version 4.0

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Introduction

S ite Directors use the *Site Workspace* to manage the entire website and establish and maintain the main *site*, while Subsite Directors use *Subsite Workspaces* to establish and maintain their respective *subsites*. What is labeled the *Homepage Workspace* is actually a subset of either the *Site Workspace* or *Subsite Workspace*. Consequently, some of the tasks discussed in this chapter will be useful for Homepage Editors as well as Site Directors and Subsite Directors. The level of editing privilege (i.e., Site Director, Subsite Director or Homepage Editor) is noted for each task.

Accessing the Site Workspace

Only Site Directors have access to the *Site Workspace*.

To access the *Site Workspace*:

1. Sign in to the website. The **Site Manager** button will appear on the *MyStart* bar. It will appear on every *page* of your website.

2. Click on the **Site Manager** button. A *Site Workspace* like the one shown in Exhibit 5-1 will appear.
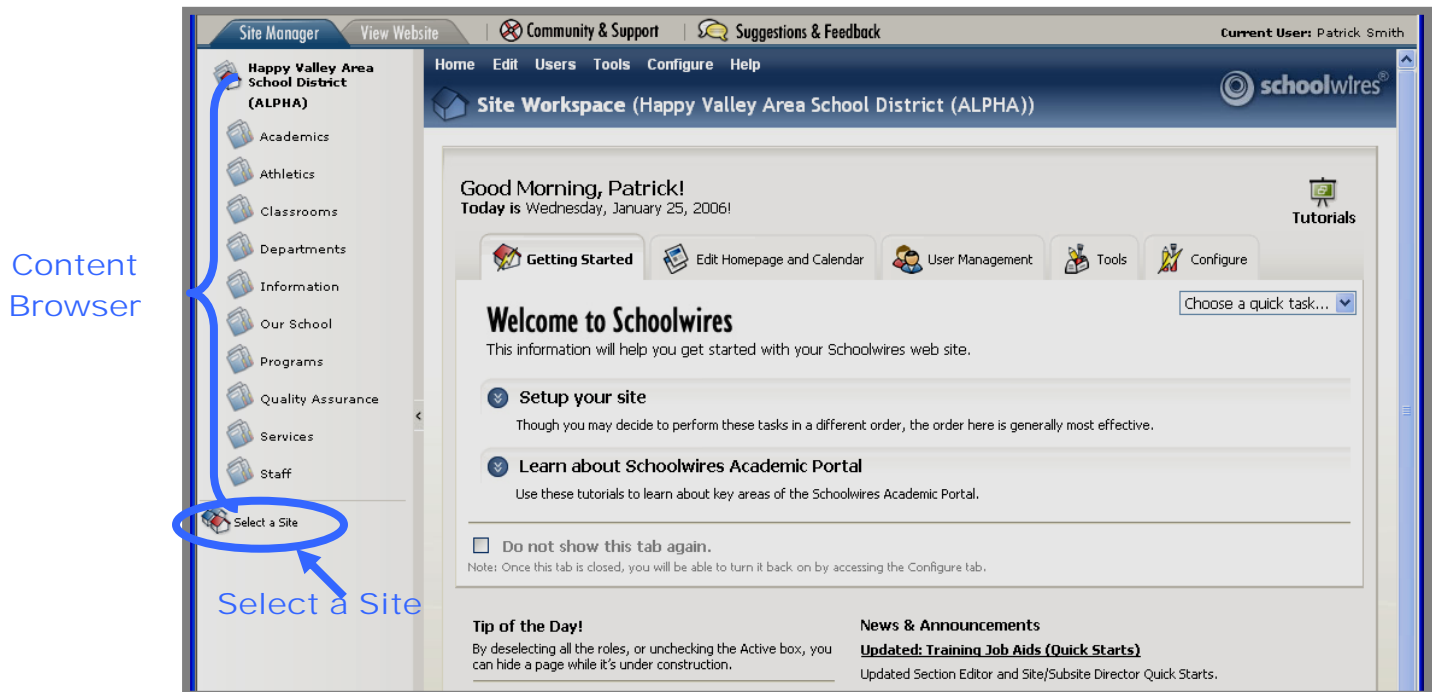
Exhibit 5-1: Site Workspace

Accessing the Subsite Workspace

A Site Director has access to the *Subsite Workspace* for each of the *subsites* on the website. A Subsite Director only has access to the *Subsite Workspace* for the assigned *subsite*.

Note: A user may be assigned as a Subsite Director for more than one *subsite*.

Site Directors

There are two ways for a Site Director to access a *Subsite Workspace*. These are:

- Navigating on the End User

- Navigating within **Site Manager**

To access a *Subsite Workspace* navigating on the End User:

1. Sign in to the website. The **Site Manager** button will appear on the *MyStart* bar. It will appear on every *page* of your website.

2. Choose the desired *subsite* from the *Select a School* link on the *MyStart* bar.

3. Click on the **Site Manager** button. A *Subsite Workspace* like the one shown in Exhibit 5-2 will display.

Exhibit 5-2: Subsite Workspace

To access a *Subsite Workspace* by navigating within **Site Manager**:

1. Sign in to the website. The **Site Manager** button will appear on the *MyStart* bar. It will appear on every *page* of your website.

2. Click on the **Site Manager** button. A *Site Workspace* like the one shown in Exhibit 5-1 will appear.

3. Click on the *Select a Site* link at the bottom of the *Content Browser*. A *Select a Site* window like the one shown in Exhibit 5-3 will display.
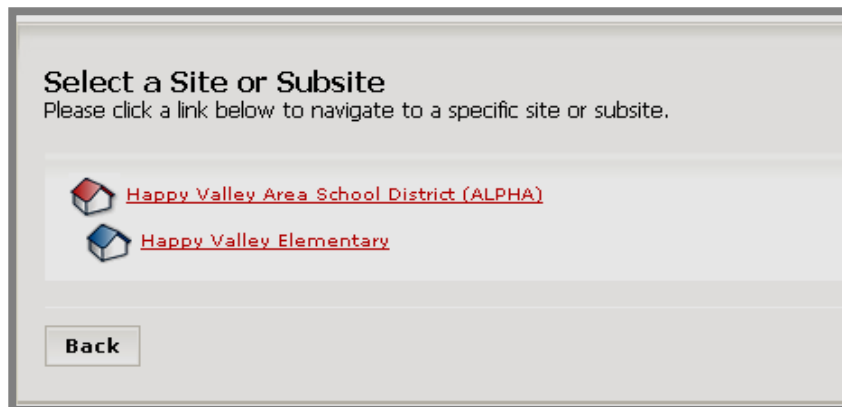
Exhibit 5-3: Select a Site window

4. Click on the name of the *subsite* you want to access on the *Select a Site* window. A *Subsite Workspace* like the one shown in Exhibit 5-2 will display.

Subsite Directors

To access a *Subsite Workspace*:

1. Sign in to the website.

2. Navigate to your assigned *subsite* on the End User. The **Site Manager** button will appear on the *MyStart* bar. It will appear on every *page* of your assigned *subsite*.

3. Click on the **Site Manager** button. A *Subsite Workspace* like the one shown in Exhibit 5-4 will display. Notice that you do not see a *Select a School* link in the *Content Browser*. This link is only available to Site Directors.

Exhibit 5-4: Subsite Workspace as seen by Subsite Director

Accessing the Homepage Workspace

The *Homepage Workspace* is actually a subset of the tasks in either the *Site Workspace* or a *Subsite Workspace*. Only Homepage Editors will see *Homepage Workspaces* since Site Directors and Subsite Directors can already access the tasks on it from their respective workspaces.

To access the *Homepage Workspace* for the main *site*:

1. Sign in to the website. The **Site Manager** button will appear on the *MyStart* bar.

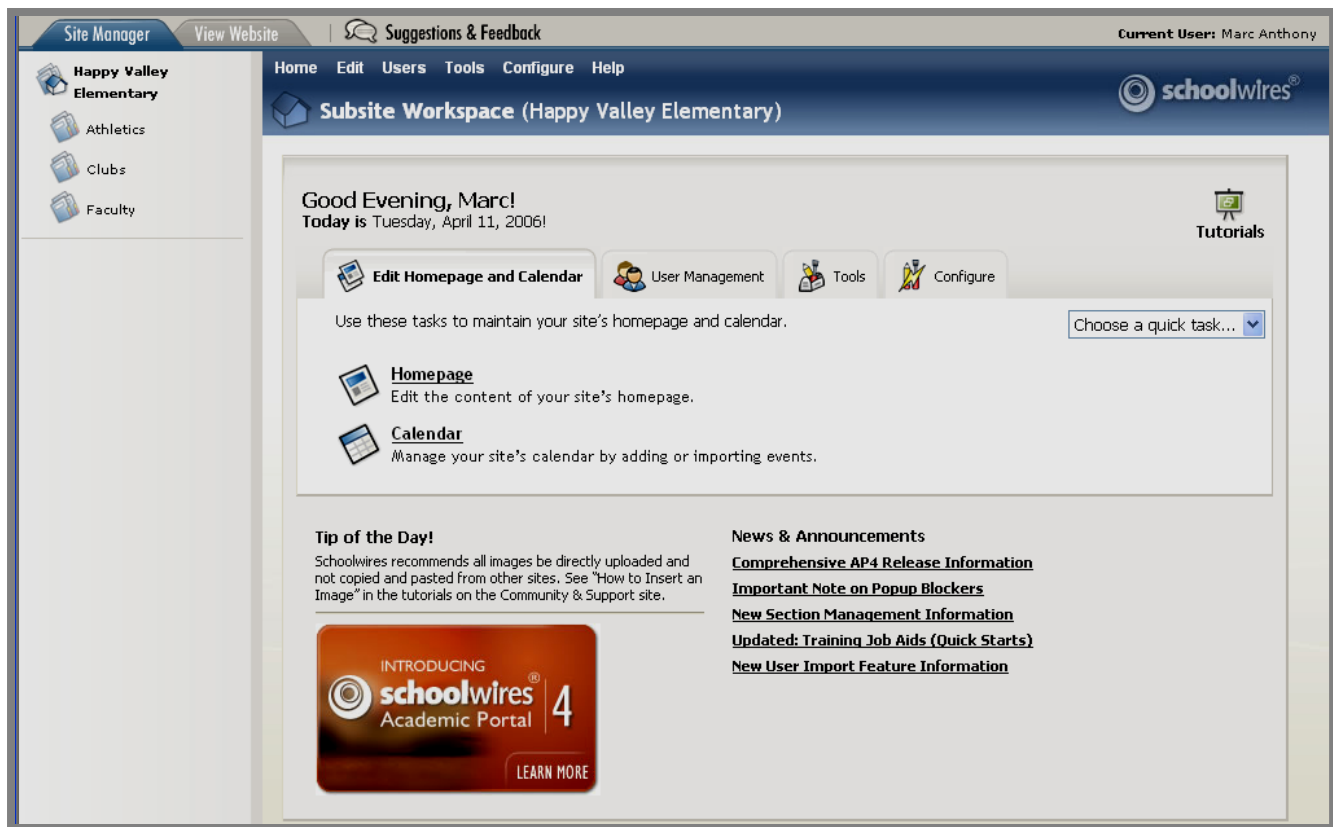2. Click on the **Site Manager** button. A *Homepage Workspace* like the one shown in Exhibit 5-5 will display. You do not see a *Content Browser* and the title of the workspace is *Site Workspace* with the name of the main *site* in parenthesis.
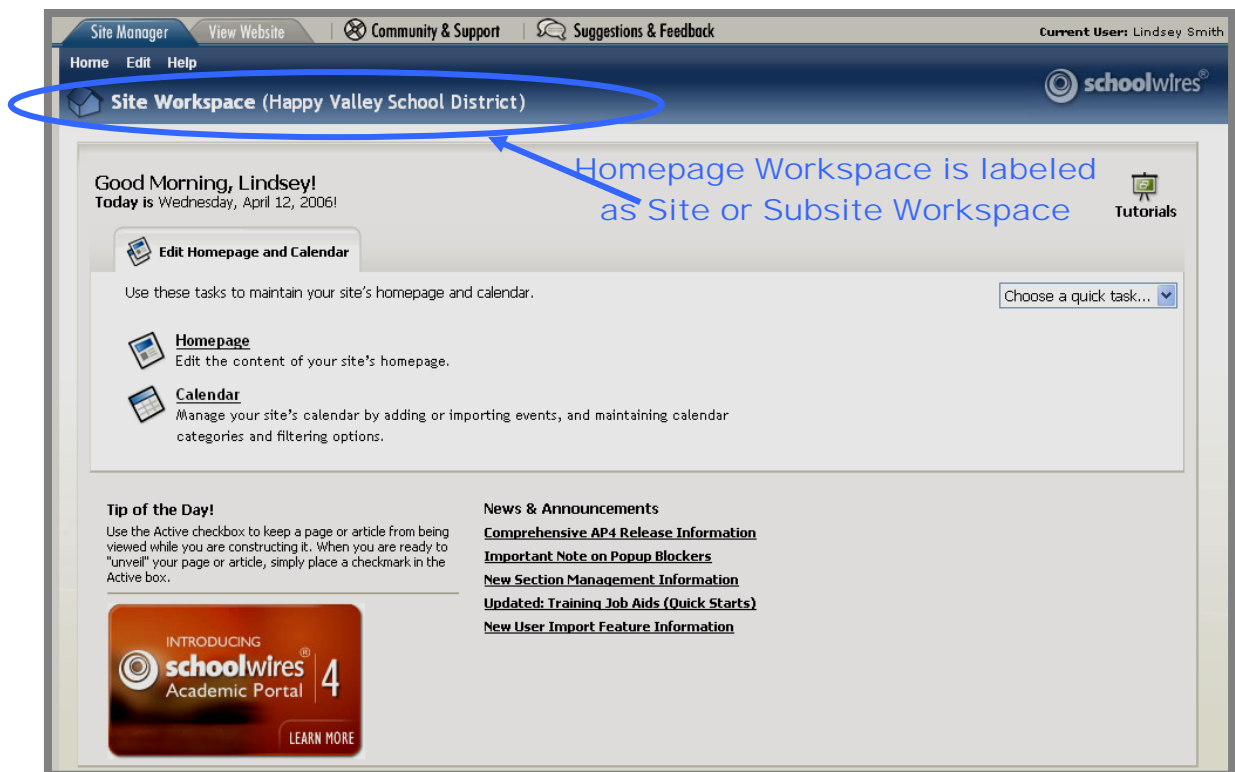
Exhibit 5-5: Homepage Workspace for a main site

To access the *Homepage Workspace* for a *subsite*:

1. Sign in to the website.

2. Navigate to your assigned *subsite* on the End User. The **Site Manager** button will appear on the *MyStart* bar.

3. Click on the **Site Manager** button. A *Homepage Workspace* like the one shown in Exhibit 5-5 will display. The title of the workspace is *Subsite Workspace* with the name of the *subsite* in parenthesis. There is no *Content Browser*.

Working in Site Manager

Introduction to Site Manager

Regardless of whether you are in a *Site Workspace* or a *Subsite Workspace*, the layout of **Site Manager** will be the same. A *Homepage Workspace* will have essentially the same layout. However, as you saw in Exhibit 5-5, it will have no *Content Browser*.
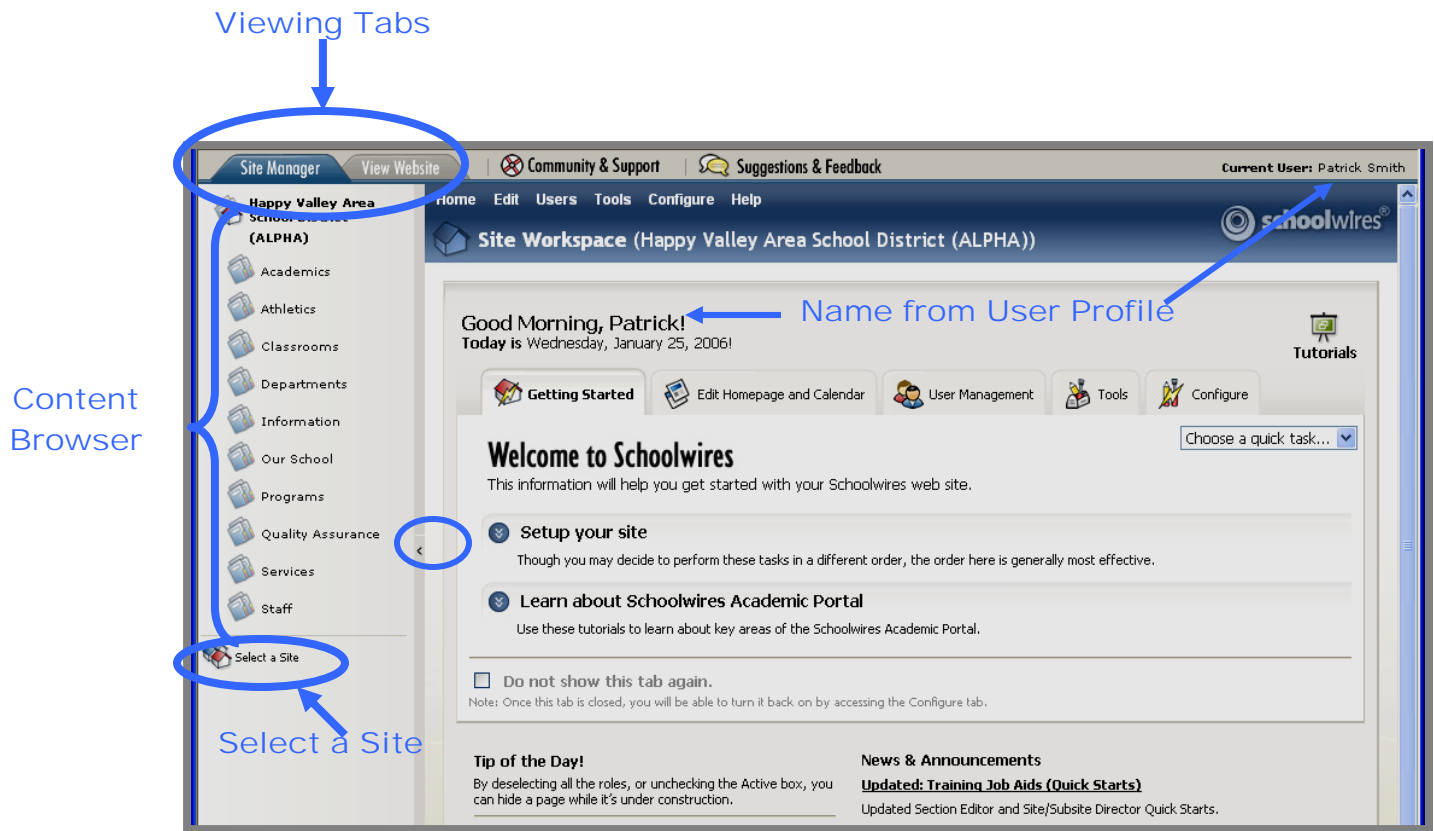
Exhibit 5-6: Site Workspace

Viewing Tabs

Notice the Viewing Tabs at the top left of the **Site Manager** window shown in Exhibit 5-6. These two tabs always appear at the top of each **Site Manager**.

> **Site Manager Tab**—when you first access **Site Manager**, it will default to the *Site Manager* tab. The information on this tab will be in front and the tab itself will be a darker color.

> **View Website Tab**—when you click on *the View Website* tab, the information on that tab will move to the front and the tab itself will be a darker color. Here you will see the refreshed website where you can view any saved changes.

Note: You will have two browser windows open:
- **Site Manager** browser window
- Original browser window

Links

Links at the top of Site Manager—there are two links at the top of Site Manager:

- Link to *Community & Support*: This is a link to the **Schoolwires** Help Site.
- Link to *Suggestions & Feedback*: This provides you with an easy way to enter suggestions for product improvements. However, you should use the link to *Community & Support* or go to http://www.schoolwires.com/requestsupport to enter support cases. You can also access **Schoolwires** support from the *Help* drop-down menu.

Content Browser

The *Content Browser* on the far left displays the active *channels* and provides you with access to *sections* and *pages*. It uses a tree view that expands and collapses in response to clicking on the available *channels* or *sections*. It is not available in the *Homepage Workspace*.

Note: Once you leave the *Site/Subsite Workspace*, you can return by:

- Clicking the *site/subsite* name at the top of the *Content Browser*;
- Clicking on the workspace title;
- Clicking on *Home* on the Main Menu bar or in a breadcrumb.

The *Content Browser* is collapsible to enable you to enlarge the workspace. You collaspse and expand it by clicking on the ☐ between *Content Browser* and the *Site/Subsite Workspace*. Exhibit 5-7 shows how **Site Manager** appears when the *Content Browser* has been collapsed. Since Homepage Editors will not see a *Content Browser* (Exhibit 5-5), there is no way to collapse or expand it.

Color-coding

The workspaces are color-coded with the workspace name in parenthesis. This provides you with a positive indication of your location.

- *Site/Subsite Workspaces* are blue. In addition, since a Homepage Editor is using a subset of the *Site/Subsite Workspaces*, the *Homepage Workspace* is also blue and labeled as either a *Site* or *Subsite Workspace*.
- *Channel Workspaces* are red.
- *Section Workspaces* are green.

Standard Elements

As you can see from Exhibit 5-7, there are some items that always display when you are in the workspace. These items are:

- *Choose a Quick Task*--provides you with easy access to frequently completed tasks. These include:
  - New Announcement (Site, Subsite Directors and Homepage Editors)
  - New Headline (Site, Subsite Directors and Homepage Editors)
  - New Event (Site, Subsite Directors and Homepage Editors)
  - New User (Site Directors only)
  - New Section (Site Directors only)
  - New Alert (Site and Subsite Directors)
- *Tip of the Day*—helpful hints for creating and maintaining your **Schoolwires** website.
- *News & Announcements*—links to hot topics from **Schoolwires**.
- *Link to Tutorials*—links to tutorials about the **Academic Portal**.
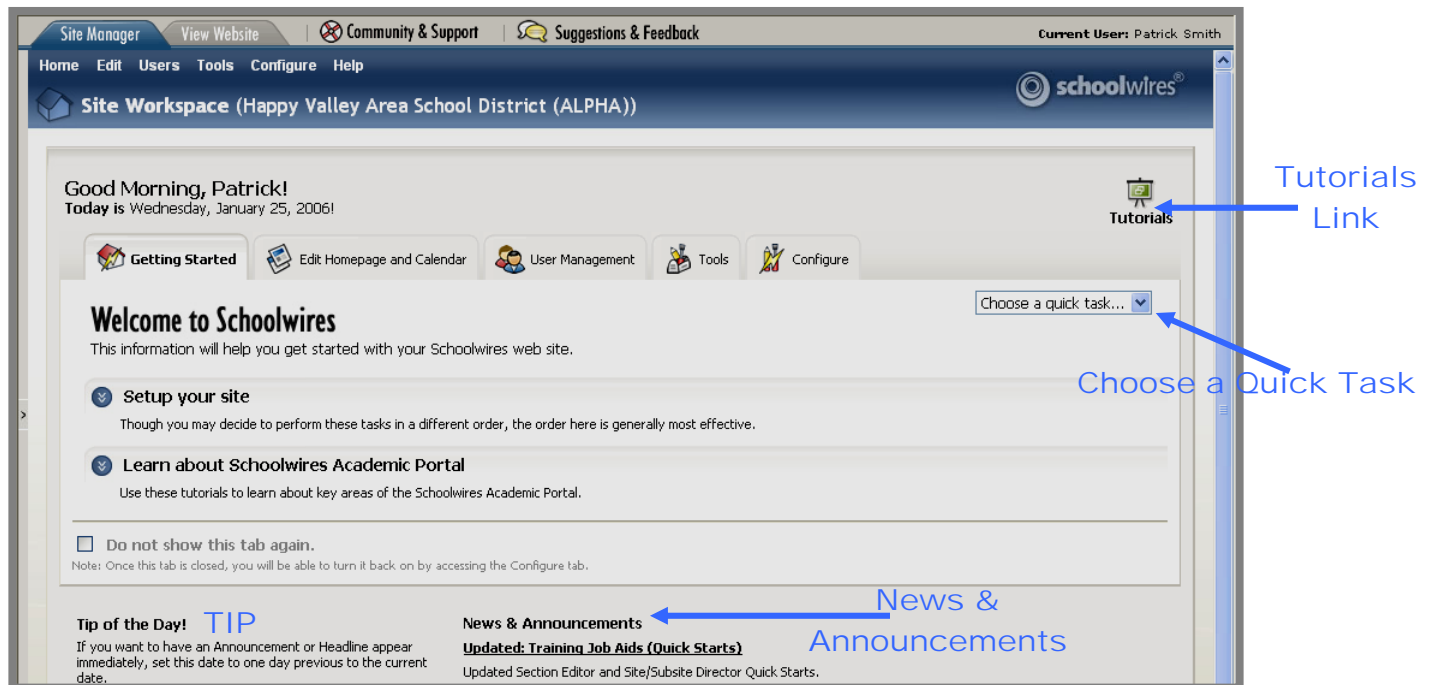

Exhibit 5-7: Site Workspace with Content Browser collapsed

Navigating in Site Manager

There are four main navigation elements in **Site Manager**. They are:

- Links: There are four main active links in the *Site Workspace*:

  o The *site* name at the top of the *Content Browser* is a link.

  o The workspace title: You can click on the title from anywhere within the *Site Workspace* to return to the *Site Workspace* Home.

  o *Home* on the Main Menu bar: You can click on Home from anywhere within the *Site Workspace* to return to the *Site Workspace* Home.

  o The *Tutorials* icon links to a library of Interactive Tutorials designed to help you use the **Schoolwires Academic Portal**.

- Breadcrumb navigation enables you to:

  o See the tab or *page* on which you are working. It appears in **bold**. In Exhibit 5-8, **Edit Welcome Text** is the current *page*.
  o Navigate backwards. In Exhibit 5-8, you can navigate back to *Edit Homepage* or to *Home* (*Site Workspace*) by clicking on the appropriate link.
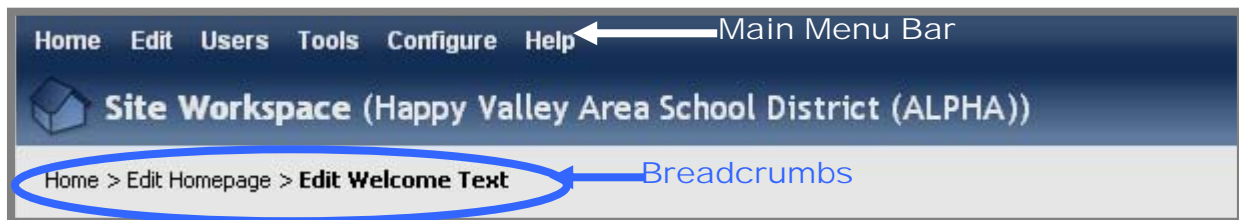

Exhibit 5-8: Breadcrumb navigation in Site Workspace

- <u>Main Menu bar</u>: As you can see from Exhibit 5-8, the *Site/Subsite/Homepage Workspace* contains a Main Menu bar, which consists of a series of drop-down menus. These menus are one way to access workspace tasks that. Generally, they correlate with the workspace, tabs which are the fourth navigation element.

  Home, however, does not correlate with any tab. It is a way to get back to the workspace if you have navigated away from it. *Help* also does not correlate with any tab in the workspace. As you can see from Exhibit 5-9, it provides you with links to many **Schoolwires** resources.
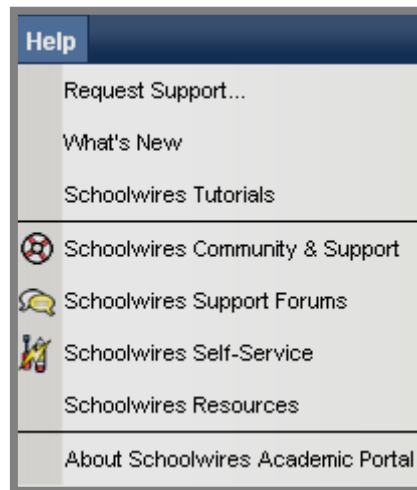

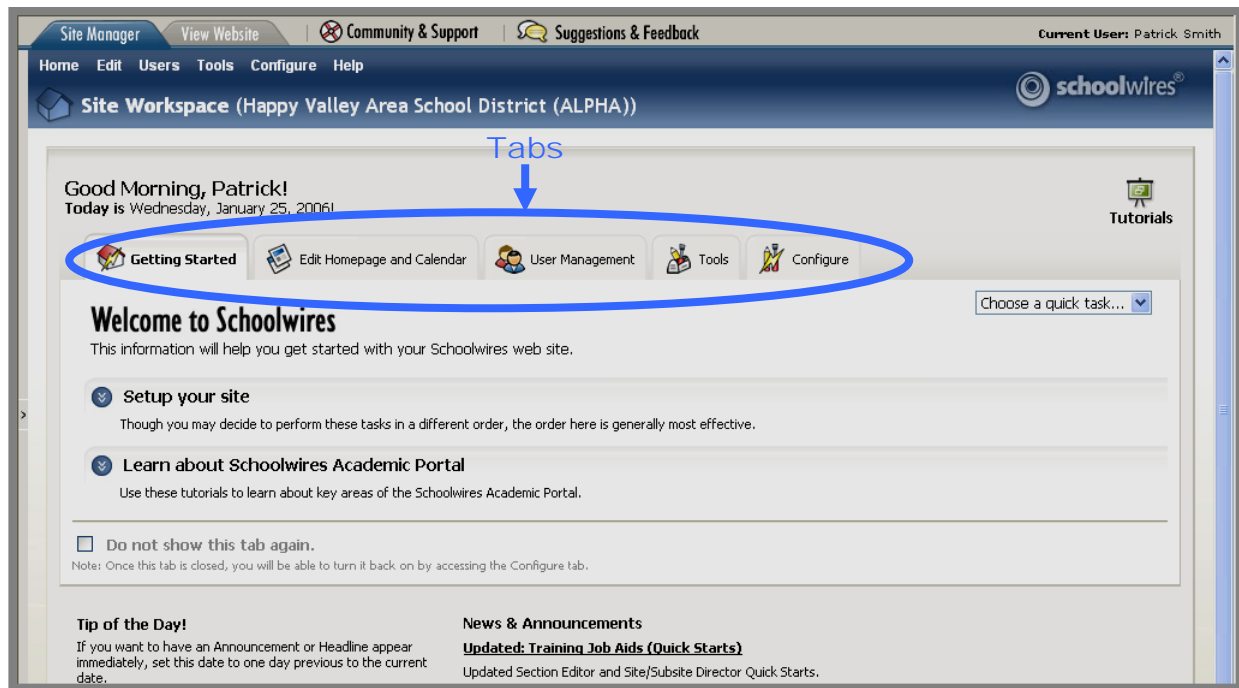
Exhibit 5-9: Help Drop-down menu

Exhibit 5-10: Site Workspace with Content Browser collapsed

- Tabs: As you can see from Exhibit 5-10, the tasks in the *Site Workspace* are organized on a series of tabs. The major tasks on each of these tabs will be covered in detail later in this chapter. These tabs are:

  o *Getting Started* tab: This tab is only available to Site Directors. It provides them with links to tasks and resources that will assist them in setting up their *sites*. Unlike the other tabs, this tab can be hidden. It can be made visible again by clicking a check box on the *Configure* tab.

  o *Edit Homepage and Calendar* tab: All of the tasks on this tab are available to Site Directors, Subsite Directors and Homepage Editors. In fact, this tab is the only tab that will be visible to Homepage Editors in their workspaces. It provides them with links to:

    ▪ *Homepage* task

    ▪ *Calendar* task

  o *User Management* tab: Some of the tasks on this tab are only available to Site Directors. They are noted below. This tab provides links to:

    ▪ *User Profiles*: Displays the database of all registered users. Site Directors add, import, edit or delete registered users using this task.

- *Role Management*: Displays the list of all the roles (viewing permissions) and system-generated role numbers for the *site*. Site Directors add, edit or delete roles using this task.

- *Site Directors*: Displays the list of registered users who have been assigned as Site Directors. Site Directors assign or remove Site Directors using this task. In the *Subsite Workspace*, this task is called *Subsite Directors*.

- *Homepage Editors*: Displays the list of registered users who have been assigned as Homepage Editors for the main *site* (*Site Workspace*) or a *subsite* (*Subsite Workspace*). Site Directors and Subsite Directors assign or remove Homepage Editors using this task.

o *Tools* tab: Some of the tasks on this tab are only available to Site Directors. They are noted below. This tab provides links to advanced features and enhancement modules:

- *Files & Folders*: Site Directors organize the files and folders used in their *sites* and in the Shared Library using this task. Subsite Directors organize the files and folders used in their *subsites* using this task.

- *Web Address Mappings*: Site Directors create and maintain friendly URLs for the entire *site* using this task.

- *Site Templates* (**Styler**™): **Styler**™, an enhancement module, must have been purchased for this to be active in the *Site Workspace*. Site Directors maintain the active template and the template library for the *site* using this task. A Site Director must activate this task for *subsites* in order for a version of this task to appear in the *Subsite Workspace*. Subsite Directors can then apply available templates to their *subsites*.

- *Broadcast Alerts (E-Alerts)*: E-Alerts, an enhancement module, must have been purchased for this to be active. Site Directors and Subsite Directors add or edit Broadcast Alerts for their respective *sites* using this task.

- *Forms & Surveys*: Forms & Surveys, an enhancement module, must have been purchased for this to be active. Site Directors and Subsite Directors create and manage forms and surveys for their respective *sites* using this task.

- *Page Layouts*: Site Directors and Subsite Directors create and manage *page* layouts that are used on their respective *sites* using this task.

- *Section Robot*: Site Directors add or import *sections* to the *site* and *subsites* using this task.

- *Content Routing*: Site Directors and Subsite Directors maintain content routing for their respective *sites* using this task.

- *Site Reports*: Site Directors and Subsite Directors view reports for their respective *sites* using this task.

o *Configure* tab: Some of the tasks on this tab are only available to Site Directors. They are noted below. This tab provides links to tasks needed to set up and maintain *site* configurations. These include:

- *Site Configurations*:

  - *Site Settings*: Site Directors and Subsite Directors control *site* information using this task. Site Directors also control template settings if the organization has **Styler™** as well as *MyStart* settings.

  - *Sort Subsites*: Site Directors control the order in which *subsites* appear in the *Select a School* drop-down list using this task.

- *Channel Configurations:*

  - *Edit Channel Names*: Site Directors add and edit *channel* names for use on the *site* using this task.

  - *Assign Channels*: Site Directors and Subsite Directors assign *channels* to be used on their respective *sites* using this task.

  - *Sort Channels*: Site Directors and Subsite Directors control the order in which the *channels* appear on the *Channel* bar of the *site* using this task.

- *Section Configurations*: Site Directors design *section* configurations that include *section* options and *page* layouts using this task.

Getting Started Tab

The *Getting Started* tab provides you with information that will assist you as you set up your website powered by **Schoolwires**. As you can see from Exhibit 5-11, you can hide this tab once you no longer require easy access to that information.
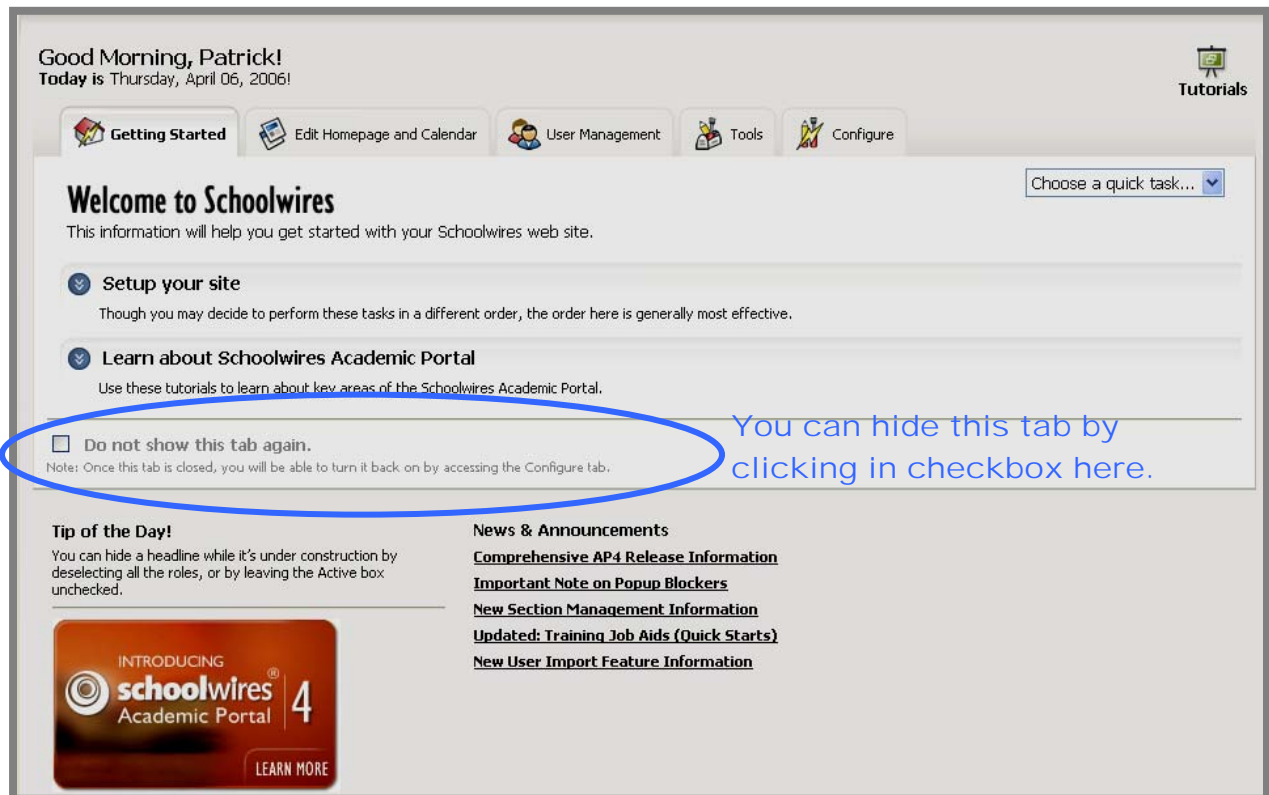

Exhibit 5-11: Getting Started tab

Hiding and Restoring the Getting Started Tab

To hide the *Getting Started* tab, click in the checkbox to the left of "Do not show this tab again."

As you can see from Exhibit 5-12, once you've hidden it, you can restore the *Getting Started* tab from the *Configure* tab.
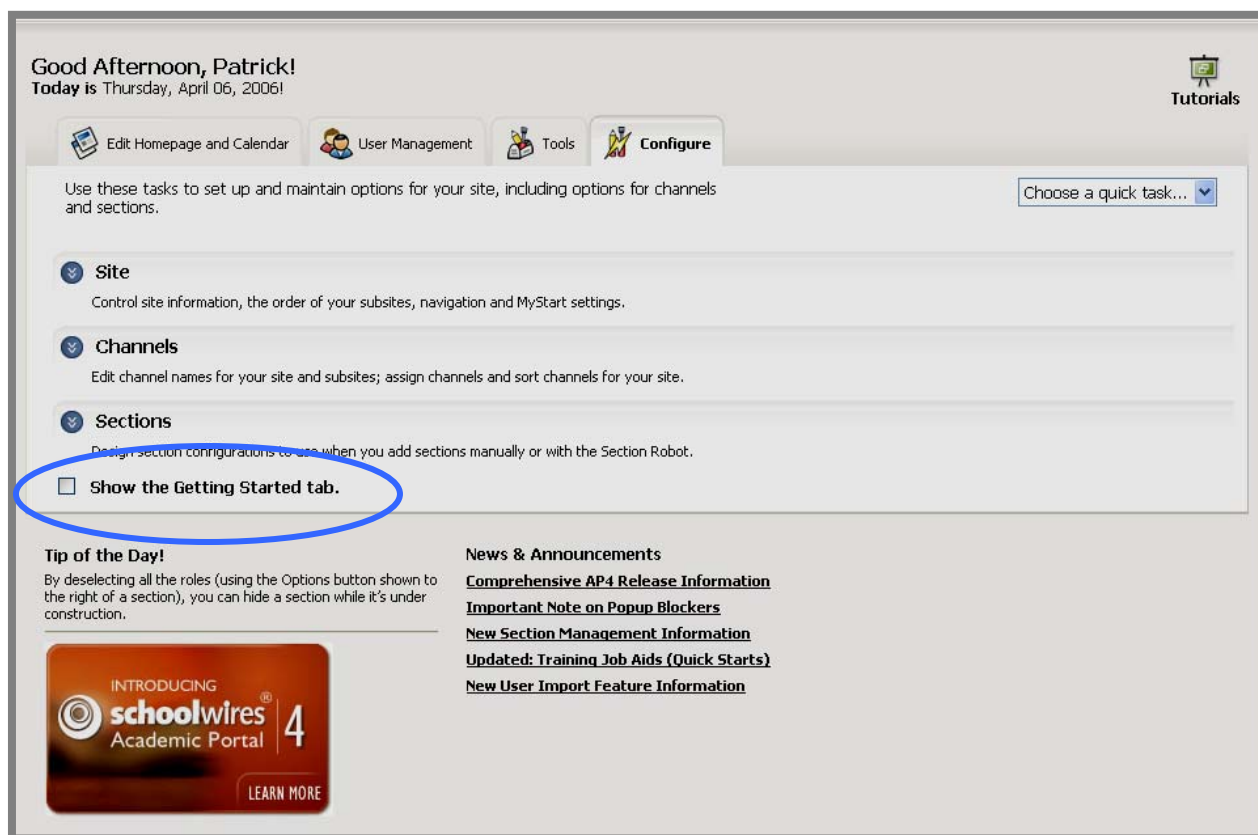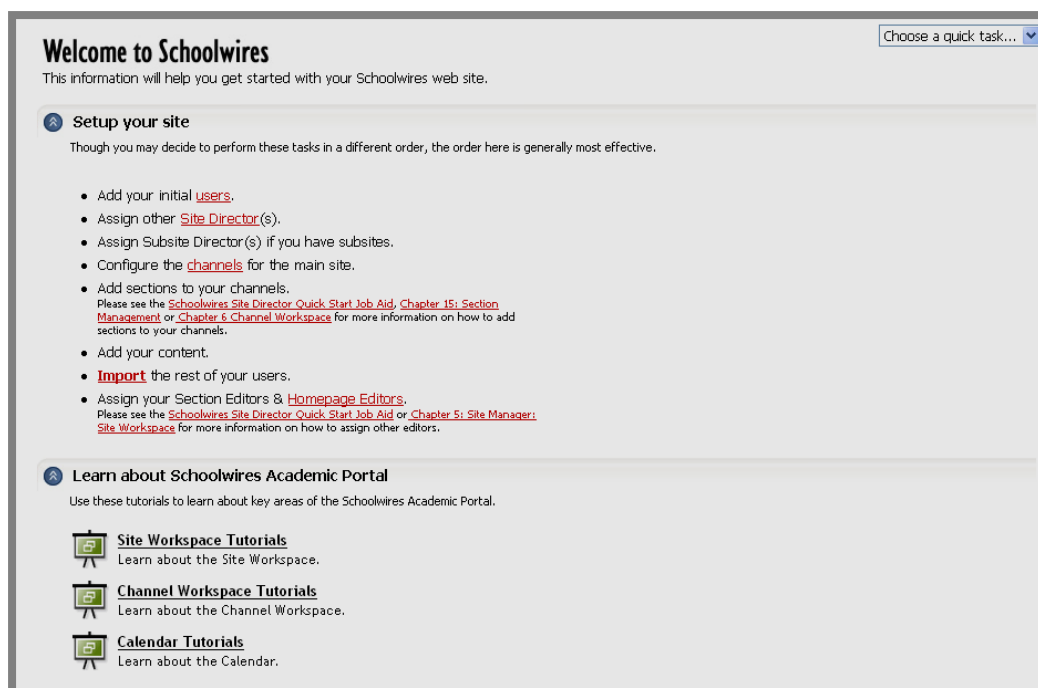
Exhibit 5-13: Configure tab

Exhibit 5-12: Getting Started tab

Setting up Your Site

As you can see from Exhibit 5-13, when you expand Setup your site on the *Getting Started* tab, it provides you with a logical sequence for completing the tasks necessary to set up your *site*. Many of these provide links to the actual tasks within the *Site Workspace* or to documents that will assist you as you complete the tasks.

Learning about the Schoolwires Academic Portal

When you expand this, you see a list of tutorials. Clicking on one of the tutorials takes you to a searchable list of available tutorials. The number of tutorials will continue to grow with the **Academic Portal**.

Edit Homepage and Calendar Tab

Site Directors, Subsite Directors and Homepage Editors all have access to this tab. For Homepage Editors, this tab represents their entire workspace.
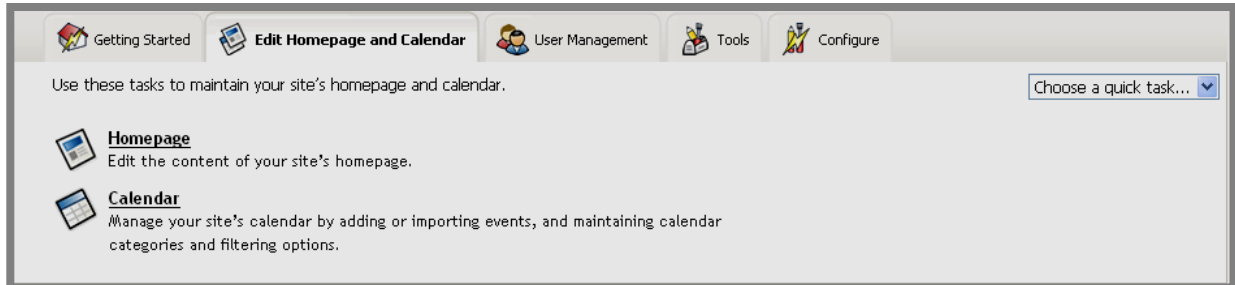

Exhibit 5-14: Edit Homepage and Calendar tab

You can also access these tasks through the *Edit* drop-down menu shown in Exhibit 5-15.
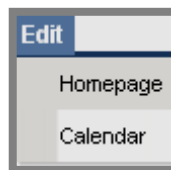

Exhibit 5-15: Edit drop-down menu

Editing the Homepage

Your homepage is the first *page* visitors to your *site* or *subsite* will see. You can use it to provide them with up-to-date information about your organization. The main *site* and any associated *subsite(s)* will each have its own unique homepage. Exhibit 5-16 shows an example of a homepage as it will appear on the website (i.e., End User). Its major components are:

- *Welcome Text*—enables you to provide visitors to your website with an overview of your organization and your website.

- *Announcements*—enable you to provide visitors to your website with timely information. Announcements may only appear on your homepage for a few days. They should be brief and to the point. For information that will remain on your website for a longer period or requires more detail, we recommend that you use *Headlines & Features*.

- *Headlines & Features*—enables you to provide visitors with more information than *Announcements* and to insert links, files and images as desired.

Exhibit 5-16: Homepage on End User

Note: *Welcome Text*, *Announcements* and *Headlines & Feature*s are the components in the **Schoolwires** standard templates. If your organization has purchased **Styler™**, you have the option of displaying all or none of these three component plus an additional component—(Site) Shortcuts—within your homepage.

Accessing the Homepage Task

To edit your homepage:

1. Access the *Site*, *Subsite* or *Homepage Workspace*.

2. Click on the *Homepage* task from either the *Edit Homepage and Calendar* tab or the *Edit* drop-down menu. A template of your homepage like the one shown in Exhibit 5-17 will display.

3. It will have the following editable regions:

   - *Welcome Text*

   - *Announcements*

   - *Headlines & Features*

   <u>Note</u>: These are the editable regions in the **Schoolwires** standard templates. If your organization has purchased **Styler™**, you will have the option of displaying all or none of those three editable regions plus an additional editable region—(*Site*) *Shortcut*s—within your homepage template. As you can see, Exhibit 5-17 contains (*Site*) *Shortcuts*. If you have a custom template, the number and location of the editable regions will be determined by the design of the custom template.
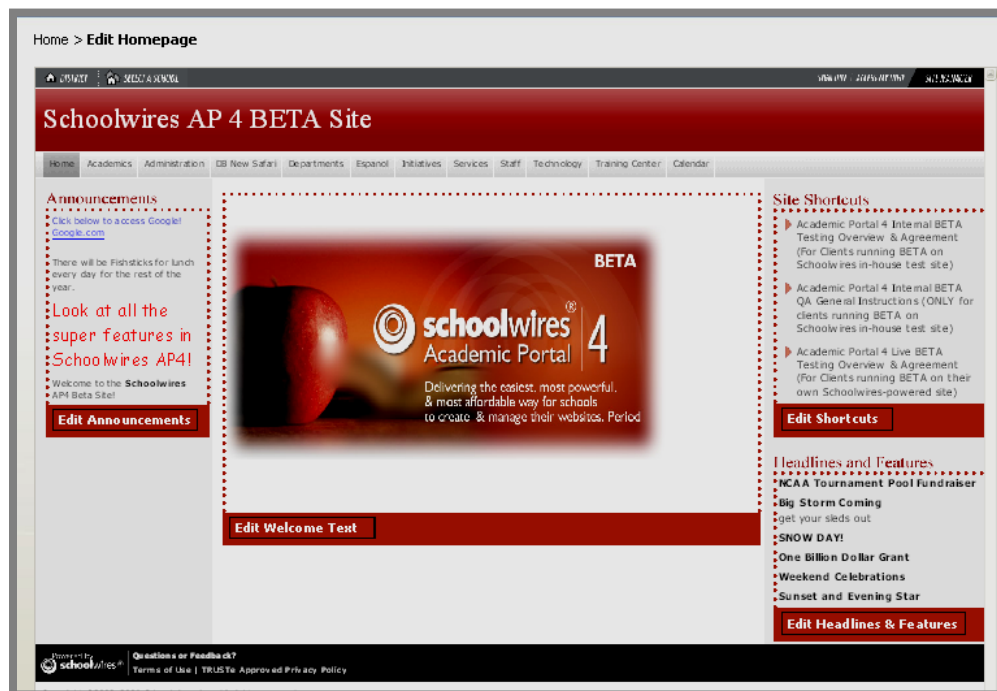

Exhibit 5-17: Homepage template

Editing Welcome Text

To edit *Welcome Text*, click on the *Edit Welcome Text* button in the template of your homepage. A **Schoolwires Editor** like the one shown in Exhibit 5-18 will display. You can enter and format content text within the **Schoolwires Editor** or copy and paste from another source, such as Microsoft® Word, Excel or your current website. You may need to do some reformatting when copying and pasting.

The **Schoolwires Editor** shown in Exhibit 5-18 will display if you are using a PC with Internet Explorer or Firefox or a Mac with Firefox. If you are using a Mac® with Safari™, you will see a Java-based **Editor**. See Chapter 8: "Working with the **Schoolwires Editor"** for more information on the **Editor**.
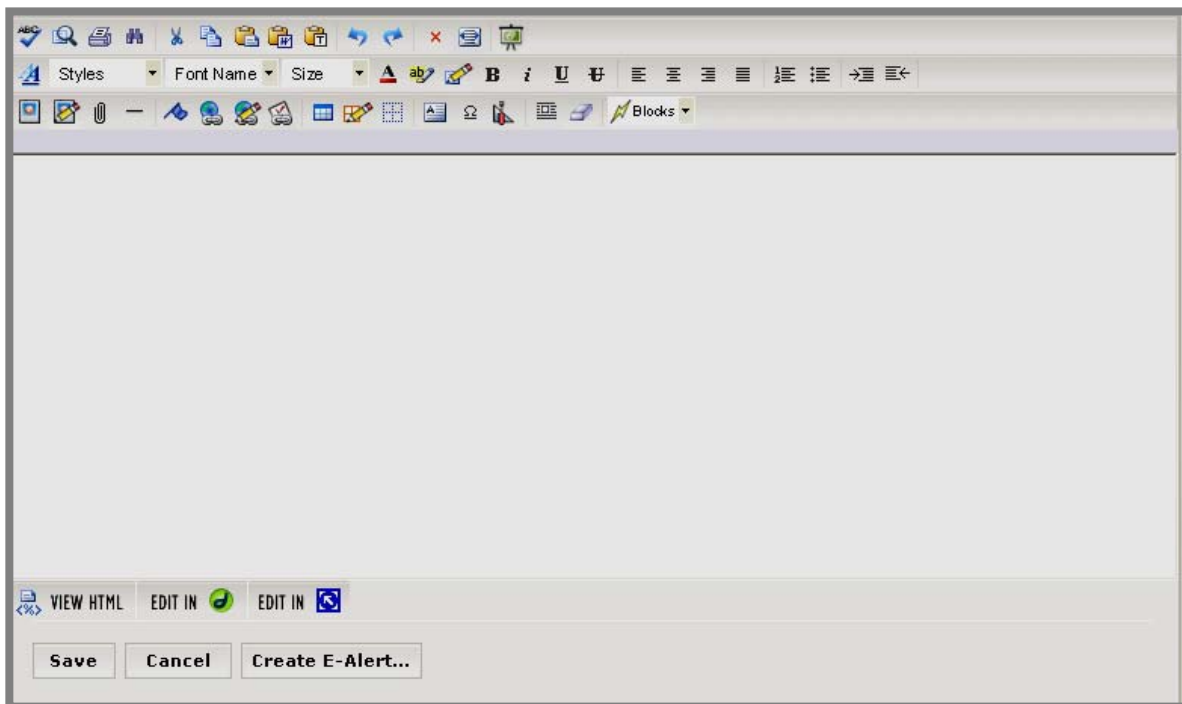
Exhibit 5-18: Schoolwires Editor

Editing Announcements

Announcements generally include information that you only want to appear on your homepage for a few days. They should be brief and to the point. For information that will remain on your website for a longer period or requires more detail, we recommend that you use *Headlines & Features*.

Adding a New Announcement

To add an announcement:

1. Click on the *Edit Announcements* button in the template of your homepage. An *Announcements* window like the one shown in Exhibit 5-19 will display.
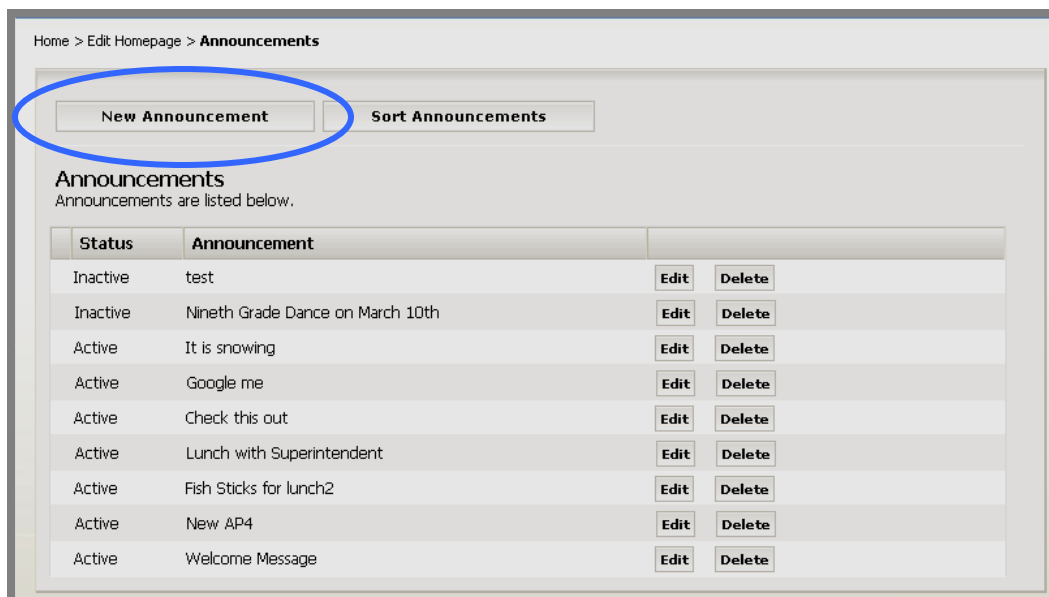
Exhibit 5-19: Announcements window

2. Click on the *New Announcement* button on the top left. A *New Announcement Title* window like the one shown in 5-20 will display.

    Note: You can also add a new *Announcement* by choosing *New Announcement* from the *Choose a quick task* drop-down menu within the workspace.

Exhibit 5-20: New Announcement Title window

> 3. Enter the Name of the announcement. This will be the title of the announcement that appears in the *Announcements* window. It will not be visible to visitors to your website.

> 4. Click the *Next* button. An *Edit Announcement* window like the one shown in Exhibit 5-21 will display. Notice the limited-function **Editor**.
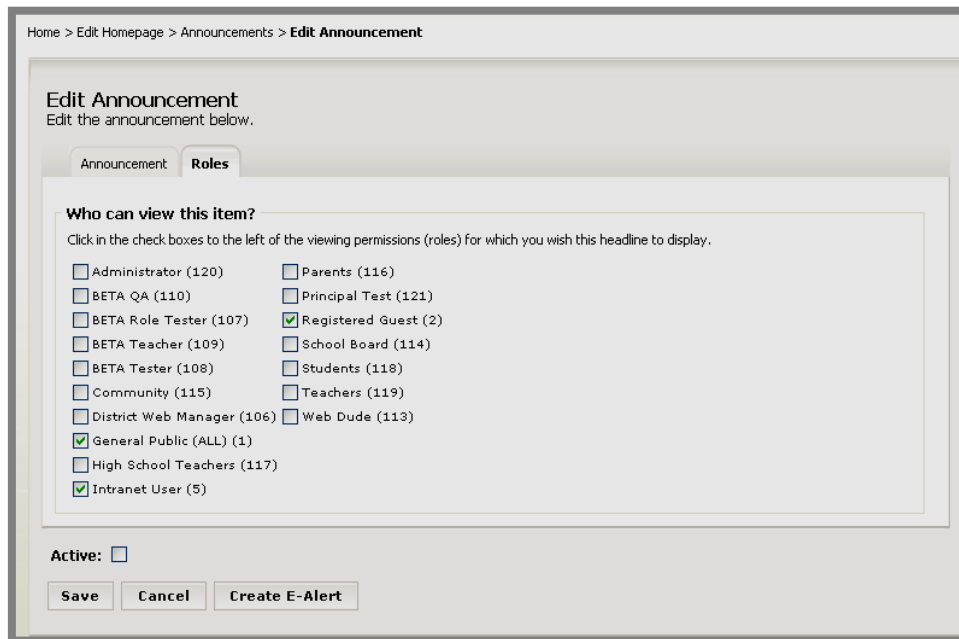
Exhibit 5-21: Edit Announcement window

5. Enter the text for the announcement in the limited-function **Editor**.

6. Enter the Start Date/Time and End Date/Time for the announcement.

   TIP: Clicking on this icon 🗓 will bring up a calendar that you can use to find the date you want. The default start date/time is the date and time you create the announcement. The default end date/time is three years from the date you created the announcement. The format for the date and time must be: mm/dd/yyyy hh:mm AM or PM.

7. If you wish to limit who can view the announcement, click on the *Roles* tab. A *Roles* tab like the one shown in Exhibit 5-22 will display.

Exhibit 5-22: Roles tab of Edit Announcement window

8. Designate who can view this announcement by selecting the desired viewing permissions (roles) and deselecting all others. <u>Note</u>: If you make no changes on this tab, the default viewing permissions (roles) will apply (Intranet Acct, General Public (ALL) and Registered Guest), and any visitor to the website will be able to view this headline. See Chapter 3: "Site Structure, Navigation and User Registration" and "Role Management" later in this chapter for more information on viewing permissions (roles).

9. Click in the Active check box if you want to make the announcement visible on your homepage on the Start Date. If you don't make the announcement active, it will not display on your website on the Start Date. You can enter an announcement at any time (preplanning), but have it display in the future by setting the date in the future and making it active. It will automatically appear on the website on the

Start Date and disappear from the website on the End Date. Although it does not display on the website after the End Date, it remains in **Site Manager**. You can, therefore, edit it and reuse it in the future.

10. Click on the *Save* button. A window confirming the successful save will display. If you use the breadcrumbs to navigate back to the *Announcements* window, you will see the new announcement. If you made it active, it will appear on the homepage within the specified date range.

Editing an Announcement

To edit an announcement:

1. Click on the *Edit Announcements* button in the template of your homepage. An *Announcements* window like the one shown in Exhibit 5-23 will display.
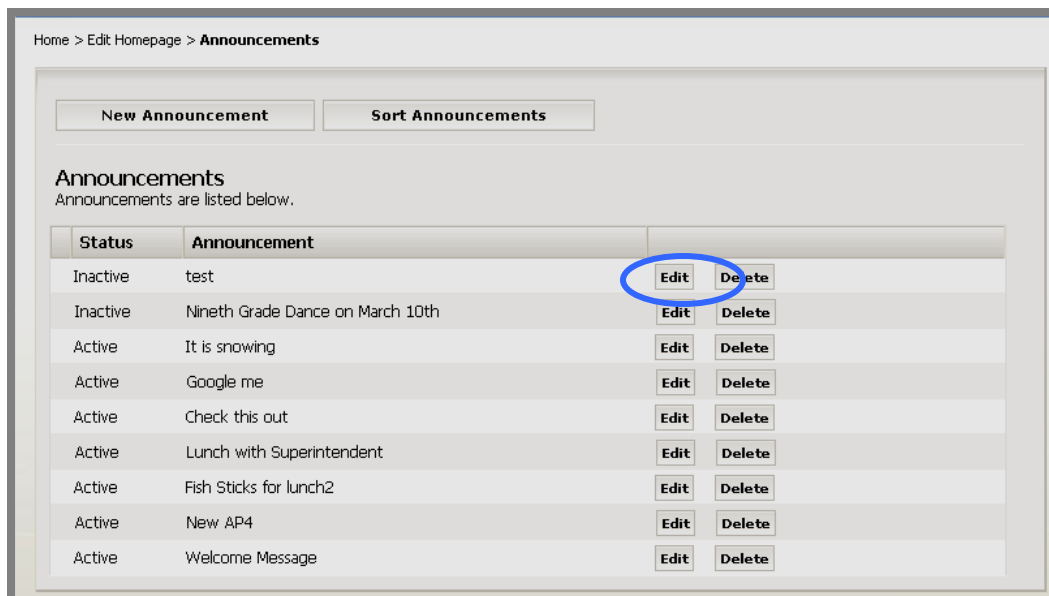

Exhibit 5-23: Announcements window

2. Click on the *Edit* button to the right of the announcement you wish to edit. An *Edit Announcement* window like the one shown in Exhibit 5-21 will display.

3. Make changes to the text, dates and roles as required.

4. Click on the *Save* button. A window confirming the successful save will display. If you made it active, the changes will display on the homepage within the specified date range.

Sorting Announcements

You can change the order in which the announcements appear on the End User. To sort the active announcements:

1. Click on the *Edit Announcements* button in the template of your homepage. An *Announcements* window like the one shown in Exhibit 5-24 will display.
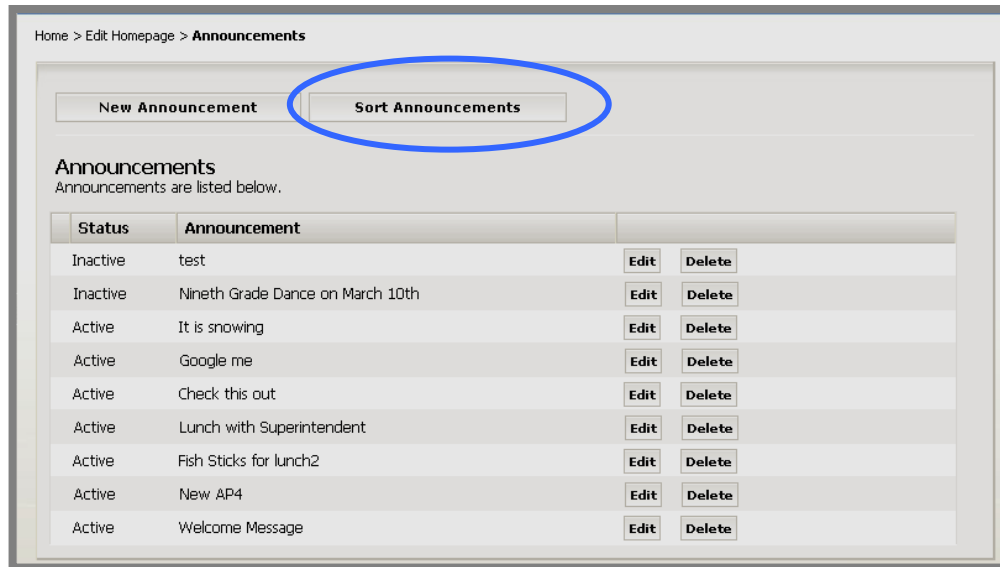

Exhibit 5-24: Announcements window

2. Click on the *Sort Announcements* button on the top right. A *Sort Announcements* window like the one shown in Exhibit 5-25 will display.
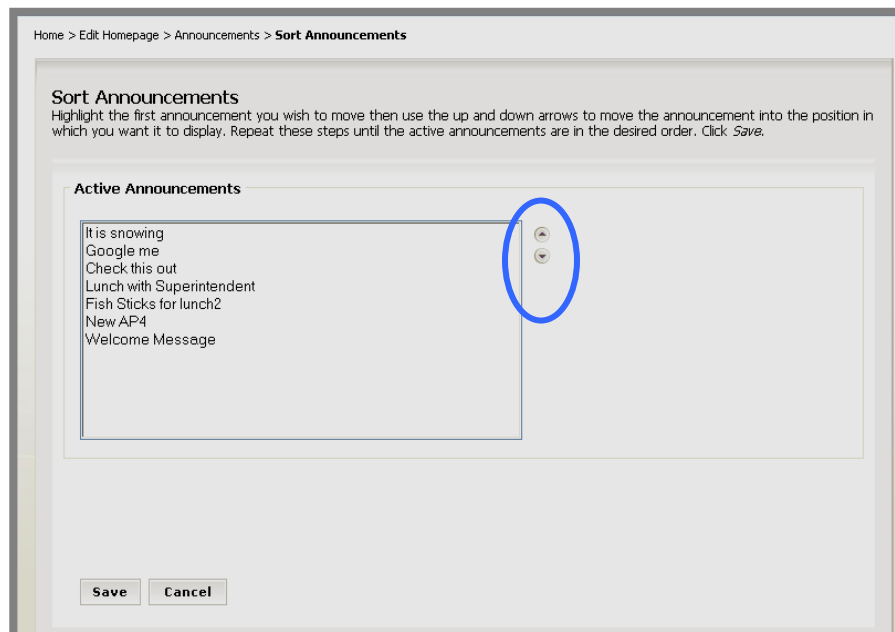

Exhibit 5-25: Sort Announcements window

3. Highlight the first announcement you wish to move.

4. Use the up and down arrows to move the announcement into the position in which you want it to display.

5. Repeat Steps 3 and 4 as required until you have the announcements in the desired order.

6. Click on the *Save* button. The *Announcements* window will return as the active window with the active announcements in the desired order. They will display in the new order on the End User.

Deleting an Announcement

To delete an announcement:

1. Click on the *Edit Announcements* button in the template of your homepage. An *Announcements* window like the one shown in Exhibit 5-26 will display.
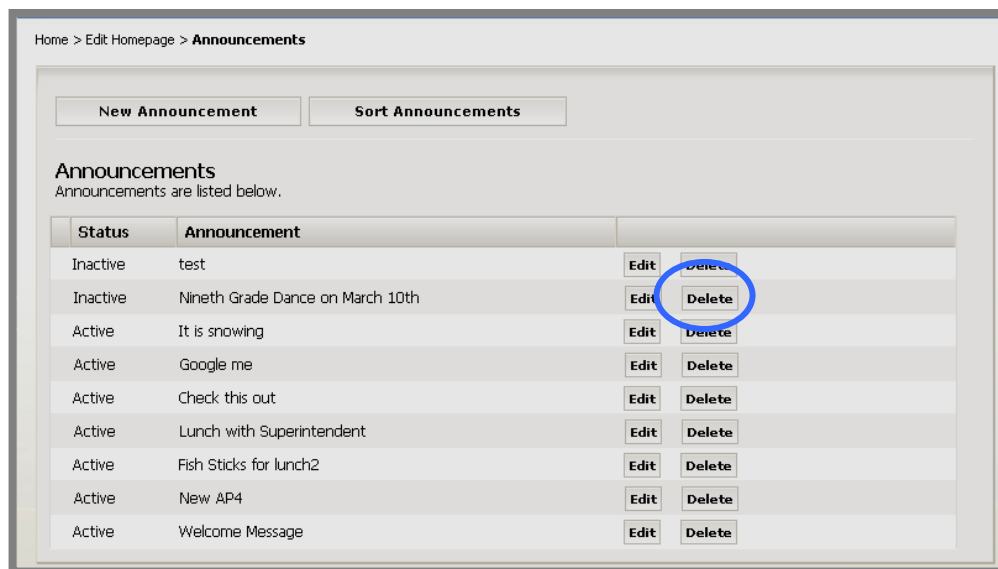

Exhibit 5-26: Announcements window

2. Click on the *Delete* button to the right of the announcement you wish to delete. A confirmation window like the one shown in Exhibit 5-27 will display.
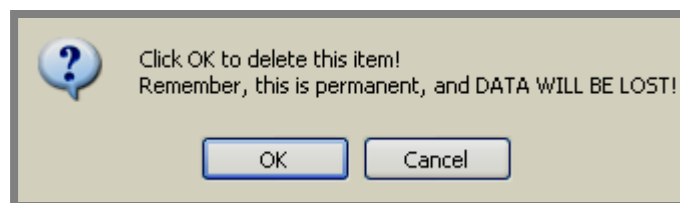

Exhibit 5-27: Confirmation window

3. Click on the *OK* button. The *Announcements* window will return as the active window. The announcement will be deleted. If it was an active announcement, it will no longer display on the End User.

Editing Headlines & Features

Headlines enable you to link to items on your homepage that are lengthy and/or require images or formatting. For concise information that will remain on your website for a shorter period, we recommend that you use *Announcements*.

Adding a New Headline

To add a new headline:

1. Click on the *Edit Headlines & Features* button in the template of your homepage. A *Headlines* window like the one shown in Exhibit 5-28 will display.
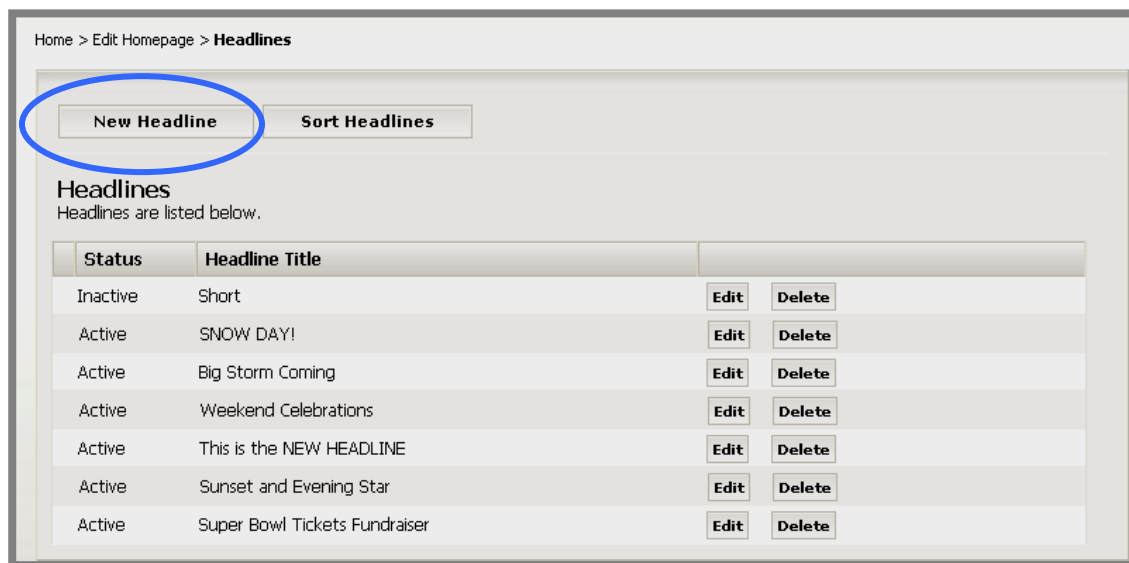

Exhibit 5-28: Headlines window

2. Click on the *New Headline* button on the top left. A *New Headline* window like the one shown in Exhibit 5-29 will display.

   Note: You can add a new *Headline* by choosing *New Headline* from the *Choose a quick task* drop-down menu within the workspace

Home > Edit Homepage > Headlines > **New Headline**

New Headline
Enter a new headline below.

Headline

Title:

Teaser Text:
Appears below the Title. Should be a short, catchy description designed to pique interest. Limit to 255 characters.

Next   Cancel

Exhibit 5-29: New Headline Title window

3. Enter the title for the new headline.

4. Enter teaser text in the Teaser Text field. This will appear with the title of your headline on your homepage. It should be a short, catchy description of the headline designed to pique interest like the opening paragraph in a newspaper article.

   TIP: You are limited to 255 characters for the teaser text.

5. Click on the *Next* button. An *Edit Headline* window like the one shown in Exhibit 5-30 will display. The window consists of four tabs:

   - *Headline* tab: Enter the headline title, teaser text and display start and end dates. You can make the headline active or inactive.

   - *Headline Body* tab: Enter the content of the headline into the **Schoolwires Editor**.

   - *Roles* tab: Determine who can view this *headline* by choosing viewing permissions (roles).

   - *Author* tab: Enter information about the author or contact person if desired.

   Note: If you are using Safari on a Mac, the *Headline Body* tab will not display. Instead, the Java-based **Schoolwires Editor** will display at the bottom of the *Headline* tab.
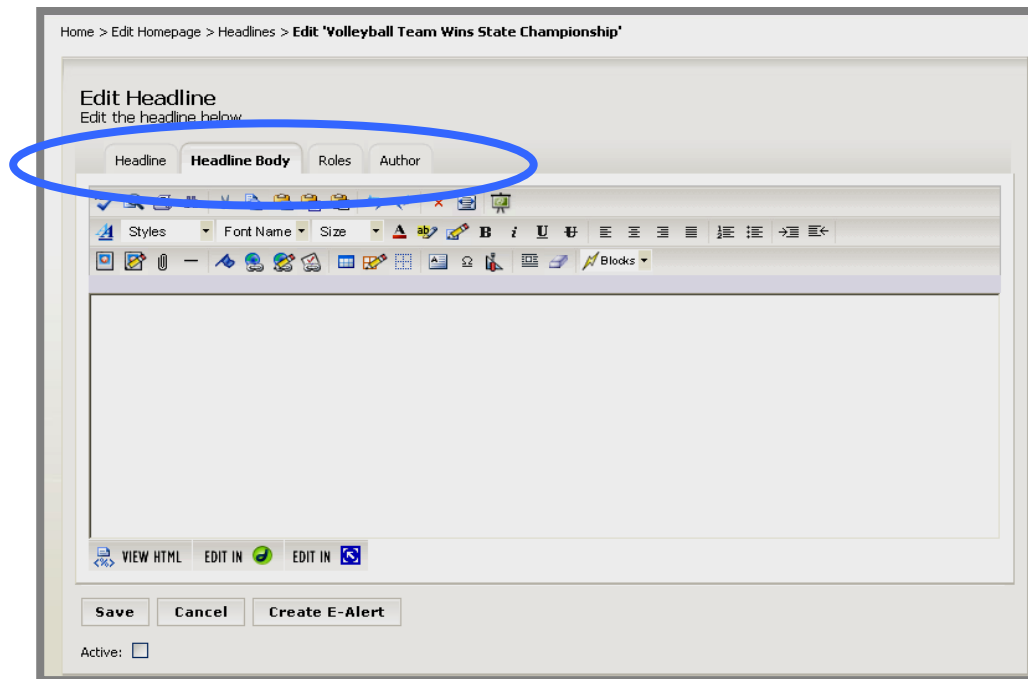
Exhibit 5-31: Edit Headline window

6. Click on the *Headline* tab. A *Headline* window like the one shown in Exhibit 5-30 will display.

Exhibit 5-30: Headline window

a. Edit the title as needed. This is the title that will appear on your homepage and should be similar to a headline you might see in a newspaper.

b. Edit the teaser text as needed.

c. Enter the start date for the headline in the Start Date field. The headline will not appear on your website until that date. <u>Note</u>: The headline must be set as Active in order to appear on your website on the designated Start Date.

   TIP: Clicking on the calendar icon will bring up a calendar that you can use to select the desired date. The default start date/time is the date you created the headline. The format for the date and time must be: mm/dd/yyyy hh:mm AM or PM.

d. Enter an end date for the headline in the End Date field. The headline will no longer be displayed on your homepage after the end date. It will remain in the *Site Workspace* after the expiration date unless you delete it.

   TIP: The default end date/time is three years from the date you created the headline.

e. Click in the Active check box if you want the headline to be visible to visitors to your website. As long as the headline is Inactive it will not appear on the website.

   TIP: While the headline is under construction, leave the Active box unchecked. Remember to make it active or it will not appear on the date you selected.

7. Click on the *Headline Body* tab. The **Schoolwires Editor** will display in the *Headline Body* window as it does in Exhibit 5-30.

8. Enter the content of the headline in the **Schoolwires Editor**. See Chapter 8: "Working with the **Schoolwires Editor**" for more information.

9. Click on the *Save* button as you work to save your headline content.

10. Click on the *Roles* tab (optional). A *Roles* window like the one shown in Exhibit 5-32 will display. Designate who can view this headline by selecting the desired roles and deselecting all others. <u>Note</u>: If you make no changes on this tab, the default viewing permissions (roles) will apply (Intranet Acct, General Public (ALL) and Registered Guest), and any visitor to the website will be able to view this headline. See Chapter 3: "Site Structure, Navigation and User Registration" and "Role Management" later in this chapter for more information on viewing permissions (roles).

Exhibit 5-32: Roles window

11. Click on the *Author* tab (optional). A blank *Author* window like the one shown in Exhibit 5-33 will display. Enter the name, phone number and email address of the author or contact person. You can enter the name with no other contact information if you desire.

Exhibit 5-33: Author window

12. Click on the *Save* button. A window confirming the successful save will display. If you use the breadcrumbs to navigate back to the *Headlines* window, you will see the new headline. If you made it active, it will appear on the homepage within the date range.

Editing a Headline

To edit a headline:

1. Click on the *Edit Headlines* button in the template of your homepage. A *Headlines* window like the one shown in Exhibit 5-34 will display.
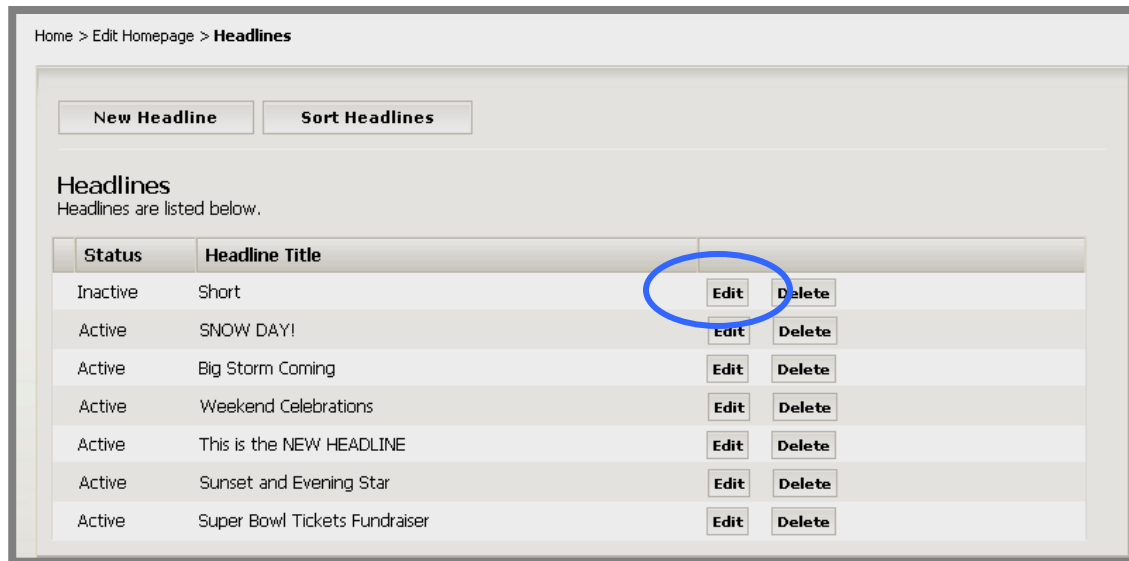

Exhibit 5-34: Headlines window

2. Click on the *Edit* button to the right of the headline you wish to edit. An *Edit Headline* window like the one shown in Exhibit 5-35 will display.
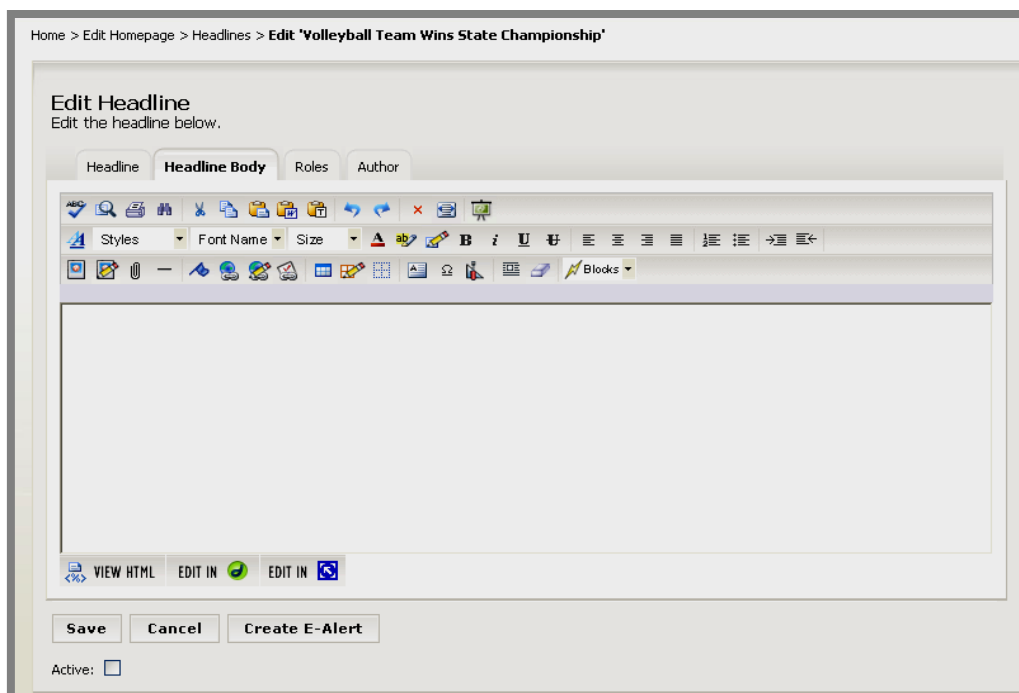

Exhibit 5-35: Edit Headline window

3. Make changes to the information on the tabs as required.

4. Click on the *Save* button. A window confirming the successful save will display. If you made it active, the changes will display on the homepage within the date range.

Sorting Headlines

You can change the order in which the headlines appear on the End User. To sort the active headlines:

1. Click on the *Edit Headlines & Features* button in the template of your homepage. A *Headlines* window like the one shown in Exhibit 5-36 will display.
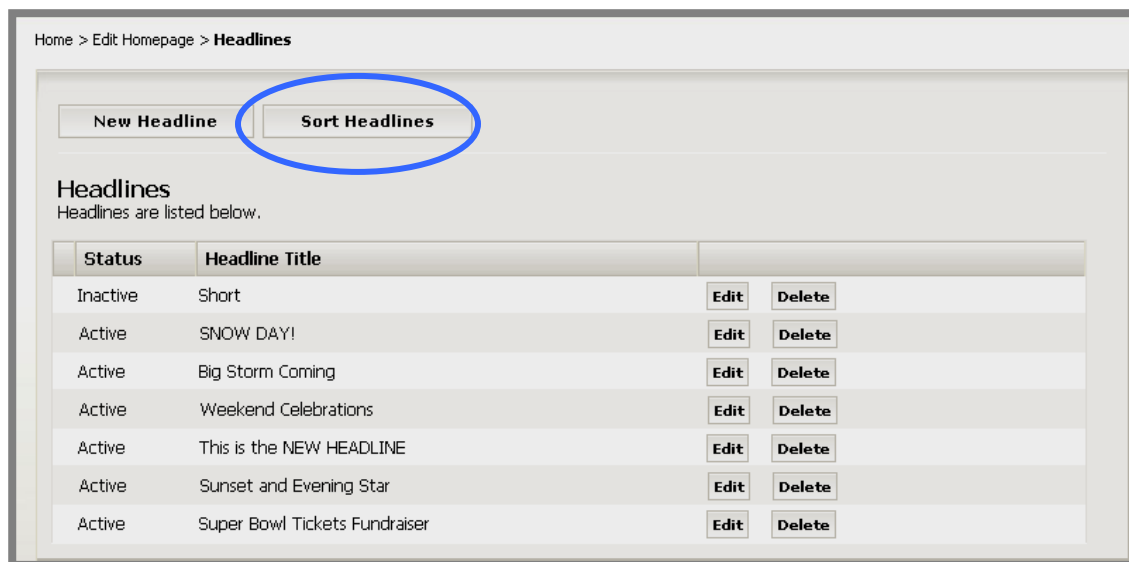

Exhibit 5-36: Headlines window

2. Click on the *Sort Headlines* button on the top right. A *Sort Headlines* window like the one shown in Exhibit 5-37 will display.
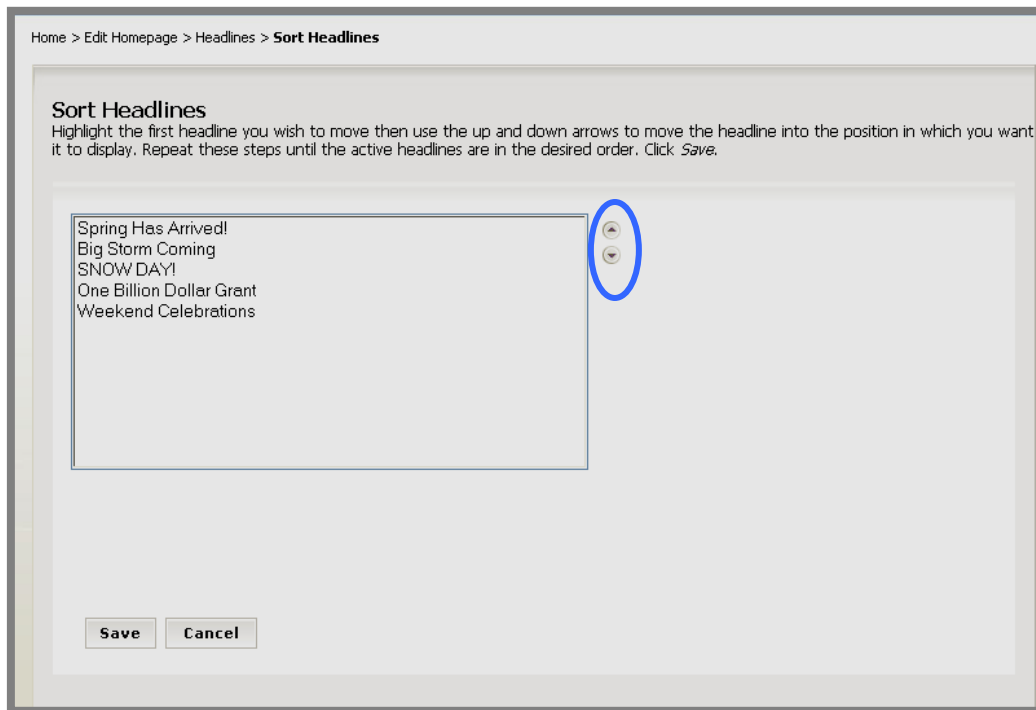
Exhibit 5-37: Sort Headlines window

3. Highlight the first headline you wish to move.

4. Use the up and down arrows to move the headline into the position in which you want it to display.

5. Repeat Steps 3 and 4 as required until you have the headlines in the desired order.

6. Click on the *Save* button. The *Headlines* window will return as the active window with the active headlines in the desired order. They will display in the new order on the End User.

Deleting a Headline

To delete a headline:

1. Click on the *Edit Headlines* button in the template of your homepage. A *Headlines* window like the one shown in Exhibit 5-38 will display.
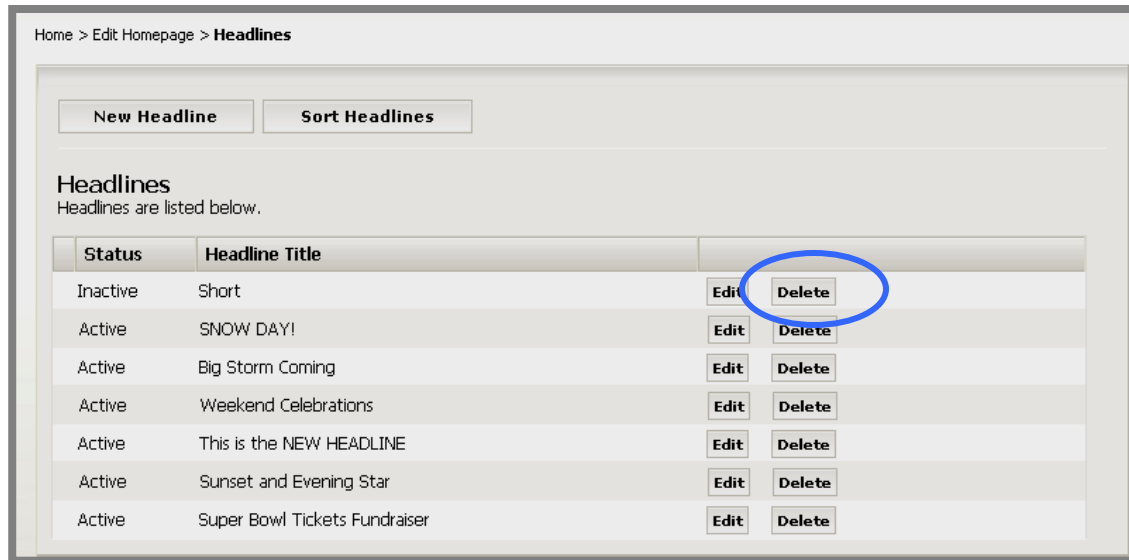
Home > Edit Homepage > **Headlines**

New Headline		Sort Headlines		

Headlines
Headlines are listed below.

Status	Headline Title		
Inactive	Short	Edit	Delete
Active	SNOW DAY!	Edit	Delete
Active	Big Storm Coming	Edit	Delete
Active	Weekend Celebrations	Edit	Delete
Active	This is the NEW HEADLINE	Edit	Delete
Active	Sunset and Evening Star	Edit	Delete
Active	Super Bowl Tickets Fundraiser	Edit	Delete

Exhibit 5-38: Headlines window

2. Click on the *Delete* button to the right of the headline you wish to delete. A confirmation window like the one shown in Exhibit 5-39 will display.
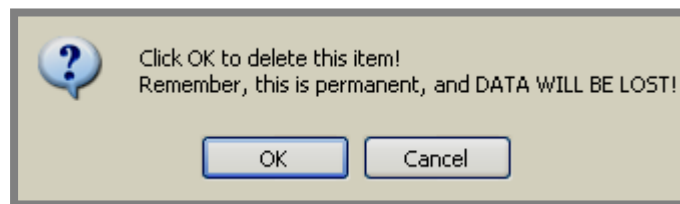
Click OK to delete this item!
Remember, this is permanent, and DATA WILL BE LOST!

OK   Cancel

Exhibit 5-39: Confirmation window

3. Click on the *OK* button. The *Headlines* window will return as the active window. The headline will no longer appear on the list. If it was an active headline, it will no longer display on the End User.

Editing (Site) Shortcuts

Schoolwires offers Hierarchy List Navigation. At the *site* level, this is called (*Site*) *Shortcuts*.

Hierarchy List Navigation allows you to build your own navigation at the *site*, *subsite*, and *section* level. It provides you with the ability to add depth below the *section* level on your *site*. It also provides automated link support for *sites*, *sections* and *pages*.

Hierarchy List Navigation at the *site* and *subsite* level is dependent on templates. Therefore, in order for Site Directors and Subsite Directors to build Hierarchy List Navigation (Site Shortcuts) at the *site* and *subsite* level, their organizations must have purchased **Schoolwires Styler™**.

Since Hierarchy List Navigation at the *section* level is not dependent on templates, Section Editors may build Hierarchy List Navigation on their *sections*, provided the Site Director or Subsite Director has enabled Hierarchy List Navigation for the *sections*.

See Chapter 9: "Edit Site and Section Hierarchy Navigation" for more information on editing Hierarchy List Navigation.

Editing the Calendar

Each *site*, *subsite* and *section* has its own calendar. Using the **Schoolwires** calendar:

- Site Directors, Subsite Directors, Homepage Editors and Section Editors can:

  o Add events that require minimal information by using the Quick Event feature.

  o Add detailed events.

  o Import events.

  o Create recurring events.

  o Create registered events and view, print and export the rosters of the registered events.

  o Add attachments to events.

- Site Directors can:

  o Create event categories that will allow visitors to quickly identify events.

  o Enable filters for use by visitors to your website. By applying these filters, these visitors can view only the calendar events in which they are interested. These events can be from any *site* or *subsite* or *section* calendar whose filter the Site Director has enabled.

  o Create mandatory events. These will display on all calendars (i.e., calendars on every *subsite* and every *section*). <u>Note</u>: The Homepage Editor for the main *site* can also create mandatory events.

  o Allow events from *subsites* as well as the *sections* on the main *site* to be posted to the calendar on the main *site*.

- Subsite Directors can:

  o Request that *subsite* events be posted to the calendar on the main *site*.

  o Allow events from *sections* on their *subsites* to be posted to the calendar on their *subsites*.

- Section Editors can request that events on the *section* calendar be posted on the calendar of the *site* or *subsite* in which the *section* appears.

- Visitors to your website can:

  o View the calendar using monthly, weekly and daily views.

  o Apply filters to the calendar to make all events visible in one place.

- o Print an event or the calendar view.

- o Export an event.

- Registered users of your website can:

  - o View events that are only visible to certain users (by role) if they have been assigned that role.

  - o Register for events once they have signed in.

  - o View all events for which they have registered.

A Site Director has access to all calendars (i.e., calendars for the *site*, and all *subsites* and *sections*), while the Homepage Editor for the main *site* has access to the *site* calendar only.

A Subsite Director has access to all calendars on the assigned *subsite* (i.e., that *subsite* calendar and all *section* calendars on that *subsite*), while the Homepage Editor for each *subsite* has access to that *subsite* calendar only.

A Section Editor only has access to the calendar for the assigned *section*.

See Chapter 13: "Working with the **Schoolwires** Calendar" for more information.

User Management Tab

As you can see from Exhibit 5-40, on the *User Management* tab, you can access the following tasks:

- *User Profiles*—allows Site Directors to add users one at a time or import them in batches. It also allows them to edit the profiles of registered users and delete them from the database if required.

- *Role Management*—allows Site Directors to add or edit roles (viewing permissions) used on the entire *site*.

- *Site Directors*—allows Site Directors to update the list of registered users who have this editing privilege for the entire *site*. In a *Subsite Workspace*, this task is called *Subsite Directors*. It allows Site and Subsite Directors to update the list of registered users who have this editing privilege for that particular *subsite*.

- *Homepage Editors*—allows Site Directors to update the list of registered users who have this editing privilege for the main *site*. In a *Subsite Workspace*, it allows Site and Subsite Directors to update the list of registered users who have this editing privilege for that particular *subsite*.
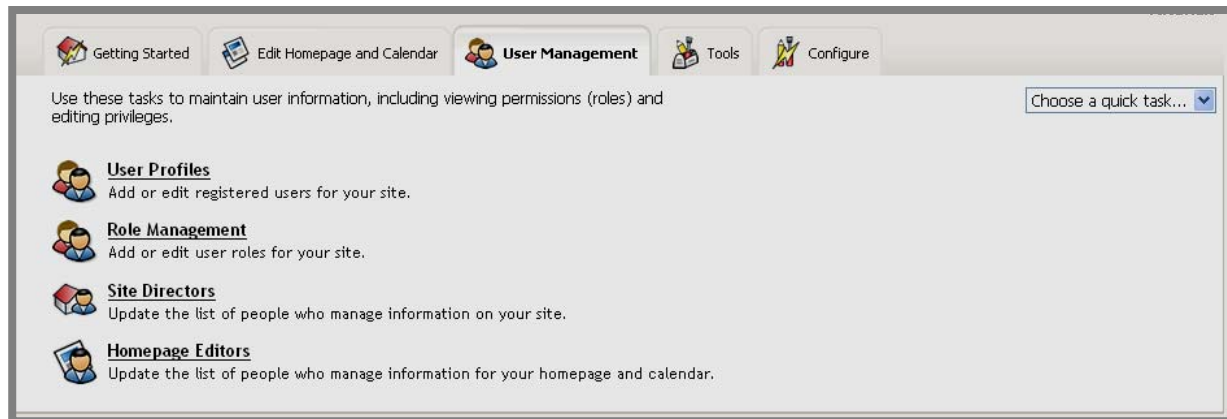
Exhibit 5-40: User Management tab

You can also access these tasks through the *Users* drop-down menu shown in Exhibit 5-41.

Exhibit 5-41: Users drop-down menu

User Profiles Task

As discussed in Chapter 3: "Site Structure, Navigation and User Registration," there are three ways users are registered on your website. These are:

- Users can register themselves if your organization has enabled *site* registration. See Chapter 3: "Site Structure, Navigation and User Registration" for more information on how users do this. **Schoolwires** does not recommend this as the way to register all your users.

- You can register users one at a time. You will do this on the *Users* tab of the *User Profiles* task. You can access this task from the *User Management* tab or the *Users* drop-down menu in the *Site Workspace*. See Chapter 5: **Site Manager**—Site Workspace" for detailed information on how to register users one at a time. It is also covered in Appendix F: "Quick Starts."

  TIP: Selecting New User on the Choose a quick task in the Site Workspace takes you to a blank user profile.

- You can import a data file of users. You will do this on the *Import Users* tab of the *User Profiles* task. You can access this task from the *User Management* tab or the *Users* drop-down menu in the *Site Workspace*. You will use a CSV (comma separated value) file when you import users. See Chapter 5: "**Site Manager**—Site/Subsite Workspace" and Appendix G: "User Import Guide" for detailed information on how to import users. The benefits to importing your are:

  o Allows you to assign roles (viewing permissions).

  o Offers a quick way to register all users.

  o Allows you to remove a set of users by rolling back the import.

When you click on the *User Profiles* task from either the *User Management* tab or the *Users* drop-down menu, a *Users* window like the one shown in Exhibit 5-42 will display. There are two tabs in this window:

- *Users* tab: displays the current list of registered users from which you can:

  o Add a new user.

  o Edit the profile of a user.

  o Remove a user from the database.

  o Export the current list of registered users.

- *Import* tab: displays a list of imports from which you can:

  o Import users.

  o Send emails to users that were in an import file.

  o View exceptions for an import.

  o Undo an import, which removes all the users that were in that import file.

Locating a User Profile

There are five search tools that will help you find a particular user profile.
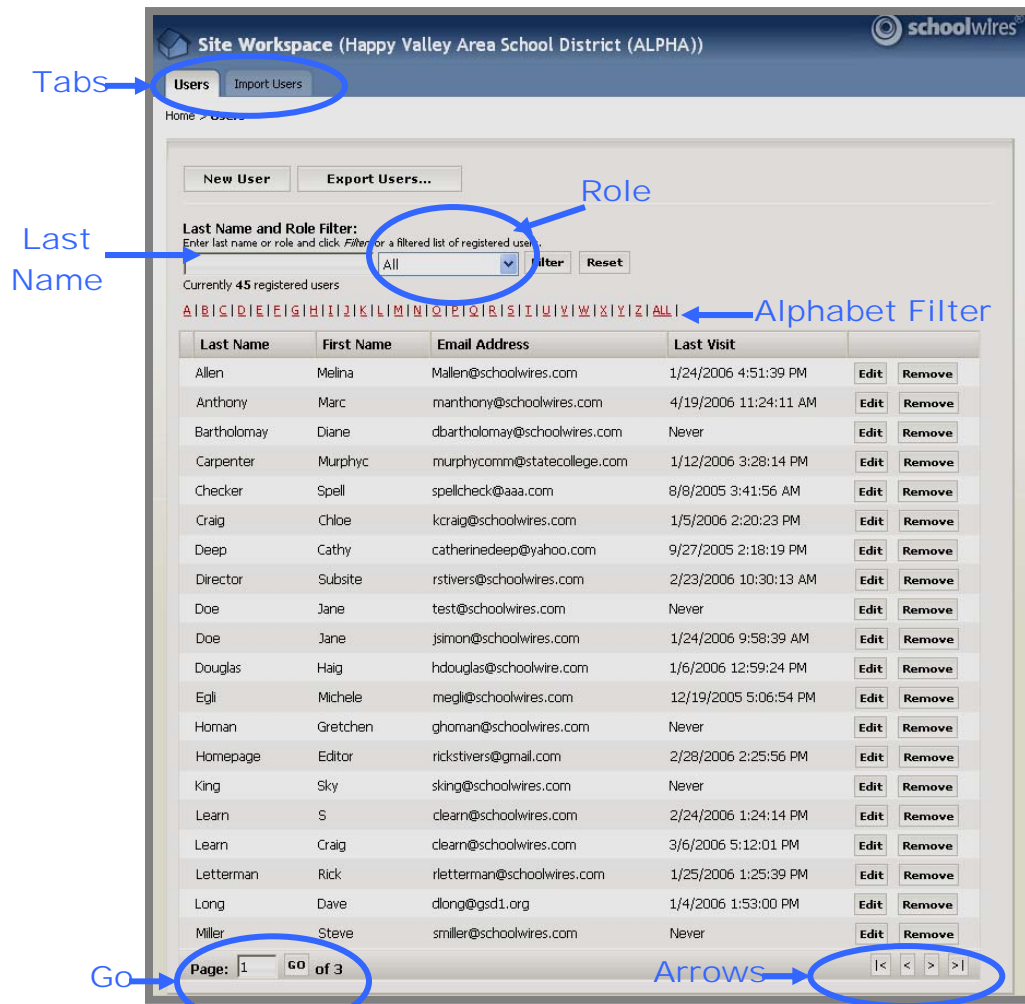These are:

Exhibit 5-42: Users window

- Use the Last Name Filter to find users. Enter a last name or part of a last name and click the *Filter* button. Only users whose last names begin with the letter or letters you entered will display. Click the *Reset* button to display the entire list of users again.

- Use the Roles Filter to find users. Choose a role (viewing permission) from the drop-down list and click the *Filter* button. Only users with that role will display. Choose All from the drop-down list or click the *Reset* button to display the entire list of users again.

- Use the Alphabet Filter to find users. Click on a letter and only users whose last names begin with that letter will display. Click the *Reset* button to display the entire list of users again.

- Use the *Go* button on the bottom left of the window to get to a certain page. Enter the page number and click on the *Go* button. That page of uses will display.

- Use the arrows on the bottom right of the window to move through the list of users, one page at a time or move to the first or last page.

Users Tab

The *Users* tab displays the list of all registered users. On this tab, you can:

- Add a new user.
- Edit the profile of a user.
- Remove a user from the database.
- Export the current list of registered users.

Adding a User

TIP: Before registering a user, check to see if he/she is already registered. Use one of the search tools to make this task easier.

To add a user:

1. Access the *Site Workspace*.
2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-43 will display.

Exhibit 5-43: Users window

3. Click on the *New Use*r button in the upper left. A blank user profile like the one shown in Exhibit 5-44 will display.
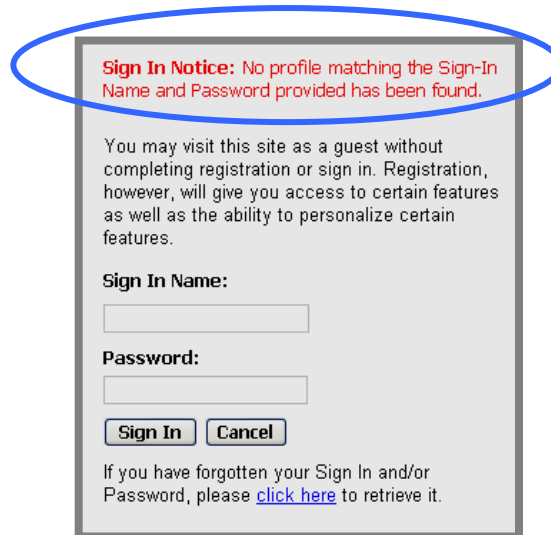

Exhibit 5-44: Blank User Profile

4. Enter the pertinent information. Items with an asterisk (*) are required.

    a. If your organization has purchased the E-alerts enhancement module, the E-alerts checkbox will display. It defaults to active (i.e., checked).

    b. The Locked checkbox should be unchecked. This will be discussed later in this chapter.

5. Click on the *Save* button. The user will be registered and will receive a confirming email with the Sign-in Name and password.

Note: You cannot assign roles (viewing permissions) to a user until you have saved that user. If you wish to assign roles after registering a user, you must click on the *Edit* button to the right of the user's name. A user can have more than one role. You can develop custom roles using the *Role Management* from either the *User Management* tab or the *Users* drop-down menu. See "Role Management" later in this chapter for more information.

Unlocking a User Profile

When a user signs in, the system tries to match the Sign-in Name with a Sign-in Name for a currently registered user. If it is either unable to find that Sign-in Name or the password does not match the one for that Sign-in Name, it returns a message like the one shown in Exhibit 5-45.
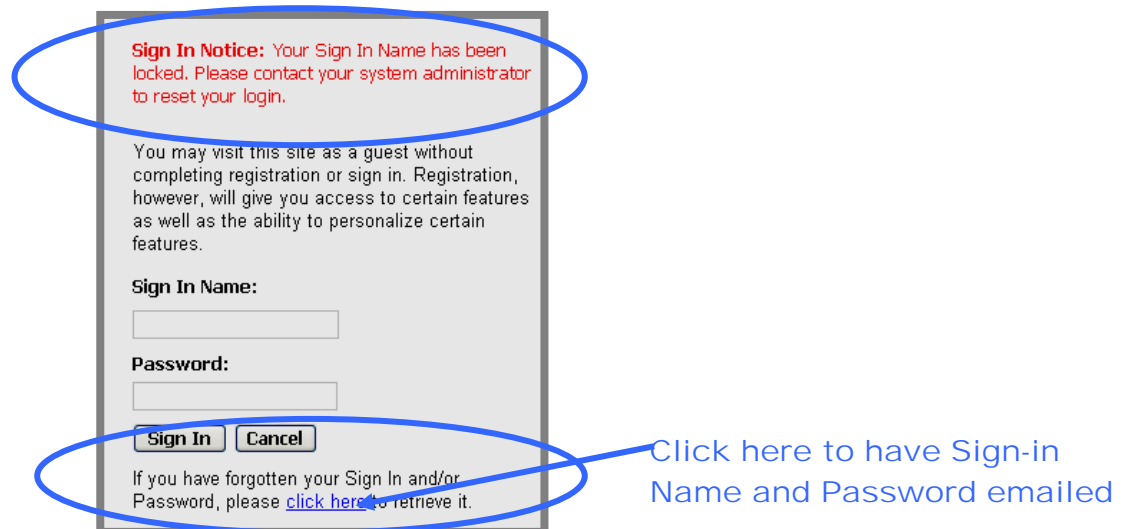
Exhibit 5-45: No Profile message

If a user enters a correct Sign-in Name but an incorrect password five times, that user will be locked out. A message like the one shown in Exhibit 5-46 will display on the sixth attempt.

Click here to have Sign-in Name and Password emailed

Exhibit 5-46: Lock-out message

TIP: The best way to avoid being either locked out or simply frustrated is for a user to have both the Sign-in Name and the password emailed by clicking on "click here" at the bottom of the Sign-in window.

If a user is locked out, only a Site Director can unlock that user. To unlock a user:

1. Access the *Site Workspace*.

2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-47 will display.

Exhibit 5-47: Users window

3. Locate the user you wish to unlock. Use one of the search tools to make this task easier.

4. Click on the *Edit* button to the right of the user you wish to unlock. An *Edit User* window like the one shown in Exhibit 5-48 will display.

Exhibit 5-48: Edit User window

5. Deselect the Locked checkbox to unlock that user.

6. Click on the *Save* button. The *Users* window will return as the active window. The user will receive an email with the Sign-in Name and Password.

TIP: It would be best to enter a new password for that user at the same time you unlock the user. The user will then receive an email with the Sign-in Name and Password.

Editing User Profiles

If you need to make a change to a user's profile:

1. Access the *Site Workspace*.

2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-467will display.

3. Locate the user profile you wish to edit. Use one of the search tools to make this task easier.

4. Click on the *Edit* button to the right of the user profile you wish to edit . An *Edit User* window like the one shown in Exhibit 5-48 will display.

5. Make the required changes, including editing the roles if required.

6. Click the *Save* button. The *Users* window will return as the active window. The changes to the user profile will be made and the user will receive an email confirming that changes were made.

Deleting User Profiles

There are occasions when you may need to delete a user's profile. For instance:

- The user's profile (account) may have become corrupted. To correct this, you will need to delete that profile and add it again.

- A user may no longer need to have access to the benefits of being a registered user.

To delete a user's profile:

1. Access the *Site Workspace*.

2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-49 will display.

3. Locate the user you wish to delete. Use one of the search tools to make this task easier.

4. Click on the *Remove* button to the right of the user you wish to delete from the database. A confirmation window like the one shown in Exhibit 5-50 will display.

Exhibit 5-49: Users window
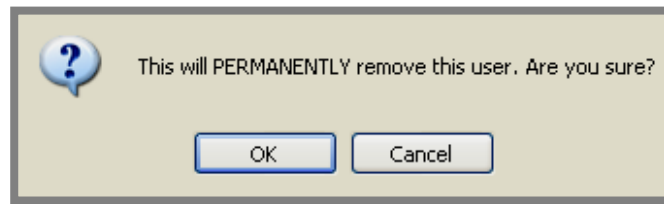
Exhibit 5-50: Confirmation of deletion

5. Click the *OK* button. The *Users* window will refresh. The user's profile you deleted will be gone.

Note: If you delete a user's profile and do not add it again, that user's profile is permanently deleted from the database. Consequently, that user can no longer view anything that is only visible to registered users or register for events. In addition, if that user had any editing privileges, these will no longer be available.

TIP: If you have deleted a user's profile and added it again, remember to reassign that user's roles (viewing permissions) and editing privileges if required.

Exporting the User Database

You may want to export the user database, perhaps as a back up or to sort it if looking for specific information. To export the database of all registered users:

1. Access the *Site Workspace*.

2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-49 will display.

3. Click on the *Export Users* button on the top of the window. A File Download dialog box like the one shown in Exhibit 5-51 will display.
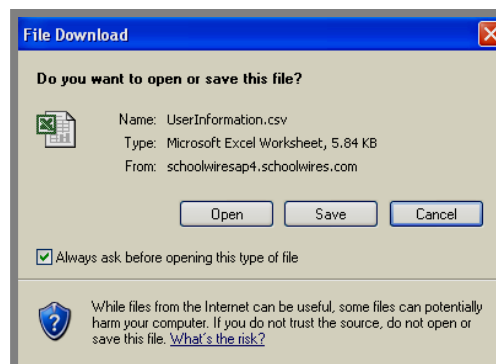
Exhibit 5-51: File Download dialog box

4. *Open* or *Save* the file.

Import Tab

The *Import* tab displays a list of imports. On this tab you can:

- Import users.

- Send emails to users that were in an import file.

- View exceptions for an import.

- Undo an import, which removes all the users that were in that import file.

Importing Users

The benefits to importing users are:

- Allows you to assign roles (viewing permissions).

- Offers a quick way to register all users.

- Allows you to remove a set of users by rolling back the import.

To import users, you need to:

1. Determine if you will import roles (viewing permissions) for the users. You do not have to assign roles during the import. Therefore, this step is optional.

2. Prepare the user import file. This will be a CSV (comma separated value) file.

3. Perform the import.

Importing Roles

You may want to assign roles (viewing permissions) to users during the import process. This is a good time to do this because you can import users with their roles rather than assign them individually at a later time.

Assigning roles (viewing permissions) allows you to selectively display content based on these roles. In addition, if your organization has purchased the E-alerts enhancement module, you can use roles when distributing Broadcast E-alerts.

Note: These roles do not affect editorial privileges.

To include roles in the import file, you will need the role number(s) for each user. You will include the role numbers in the import file. You obtain these numbers from the *Role Management* task on the *User Management* tab or the *Users* drop-down menu. The *Role Management* task will be discussed later in this chapter.

Preparing the CSV File to Import Users Initially

TIP: Break the user list into multiple CSV files rather than one large file. This makes the process more manageable and allows you to roll back (undo the import) a small number of users rather than all users. For instance, you might organize the CSV files by roles (viewing permissions) or buildings.

You can either export users from your current user database or system to a CSV format or prepare a new CSV file. A CSV file can be a text file of you can use a program like Microsoft® Excel to create the file. If you use Microsoft® Excel to create the file, however, you will need to save the file as a CSV file rather than a normal Excel file once you have entered all the data.

⚠ **Warning**: Do not include any single or double quotes, commas or hyphens in any field within the CSV file.

Here is the data that is required for the CSV file:

Column Name	Character Limits	Required
FirstName	40 characters	yes
LastName	40 characters	yes
UserName	25 characters	yes
Roles	Role numbers separated by *	no (need comma in field if no roles assigned)*
Email	50 characters	yes
Password	1-14 characters	no (need comma in field if no password entered)*

*If you are using Microsoft® Excel, do not enter a comma in the cell. Simply leave it blank. No commas are required or visible in an Excel CSV file.

Note: UserName is the same as Sign-in Name.

If you are using a text file, the CSV file will look something like this:

FirstName,LastName,UserName,Roles,Email,Password
Rick,Smith,Rsmith,106*107,r_smith@hotmail,
Rich,Smith,Rismith,106*107,richard.smith@verizon.net,
Richard,Smith,RDSmith,,richsmith@adelphia.net,246smith

Notice that the last entry in this example has no roles assigned, but does have a password assigned. For text files, indicate the end of the row by hitting Enter.

Note: Please include the header row exactly as shown.

Here is how this information would appear in an Excel CSV file:

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Roles	Email	Password
2	Rick	Smith	Rsmith	106*107	r_smith@hotmail.com	
3	Rich	Smith	Rismith	106*107	richard.smith@verizon.net	
4	Richard	Smith	RDSmith		richsmith@adelphia.net	246smith

If you have not included a password in the CSV file, upon import, a random number is automatically appended to the end of the username to generate a password. User can change this password by accessing the *site*, signing in and clicking the *Access My Info* button at the top right of the grey *MyStart* bar.

Note: 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.

Preparing the User Import File for Updating Roles and Passwords

⚠ **Warning**: Exercise caution when employing the User Import to update user information. The User Import will update every field within the user database except the Sign-In Name (i.e., UserName). Therefore, before you begin any imports to update user information, we highly recommend that you export your current user database to ensure you have a backup. Undoing an import for an update will remove all users included in that import.

⚠ **Warning:** Do not use the User Import to update passwords or roles for any users with identical Sign-In Names (i.e., UserNames). If you do, the first user will be updated multiple times while the other users will not be updated. To ensure that this does not occur, you should check your current user database for duplicate Sign-In names (i.e., usernames) before attempting any updates using the User Import. The easiest way to do this is to export your current user database to a CSV file and sort by UserName or do a search for duplicate UserNames.

If you are updating only passwords, the roles currently assigned to the users will not be affected *provided you include the role numbers for roles currently assigned to the users in the CSV file.*

⚠ **Warning:** If no role numbers are entered for a user, any existing roles will be lost during the update.

Note: Updating roles or passwords will have no effect on assigned *editing privileges*.

How to Update Roles

To update user roles, you will need to prepare a user import file using the same fields as you did for the original user import file. Change the role numbers as required within that file and proceed with the user import.

⚠ **Warning**: Any role numbers that are entered will replace role numbers currently in the user database for that user. If no role numbers are entered for a user, any existing roles will be lost during the update.

How to Update Passwords

To update passwords, you will need the following data in your CSV file:

Column Name	Character Limits	Required
FirstName	40 characters	yes
LastName	40 characters	yes
UserName	25 characters	yes
Roles	Role numbers separated by *	no (need comma in field if no roles being updated)*; if no role numbers are entered for a user, any existing roles will be lost during the update
Email	50 characters	yes
Password	1-14 characters	yes (for users whose passwords you are updating); put a comma in the field if no password is entered*

*If you are using Microsoft® Excel, do not enter a comma in the cell. Simply leave it blank. No commas are required or visible in an Excel CSV file.

Note: Passwords are not case-sensitive.

Note: UserName is the same as Sign-In Name.

Below is an example of the format for the comma-separated file when updating passwords. In an update, no passwords will be changed unless they are included in the CSV file. *There is no auto-generation of passwords when updating existing users*. Notice that the last entry in this example has no roles or passwords assigned. If that user had roles assigned, those roles would be lost with this update. For text files, indicate the end of the row by hitting *Enter*. Note: If you are saving your file as an Excel CSV file rather than a text file, you will not need to enter commas in the cells.

FirstName,LastName,UserName,Roles,Email,Password
Rick,Smith,Rsmith,106*107,r_smith@hotmail.com,changeme
Rich,Smith,Rismith,106*107,richard.smith@verizon.net,12bca
Richard,Smith,RDSmith,,richsmith@adelphia.net,

Note: Include the header row exactly as shown.

Here is how this information would appear in an Excel CSV file:

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Roles	Email	Password
2	Rick	Smith	Rsmith	106*107	r_smith@hotmail.com	changeme
3	Rich	Smith	Rismith	106*107	richard.smith@verizon.net	123bca
4	Richard	Smith	RDSmith		richsmith@adelphia.net	

⚠ **Warning**: Any role numbers that are entered will replace role numbers currently in the user database for that user. If no role numbers are entered for a user, any existing roles will be lost during the update.

Importing the CSV File

To import the CSV File:

1. Access the *Site Workspace*.

2. Click on the *User Profiles* task from either the *Users* drop-down menu or the *User Management* tab. A *Users* window like the one shown in Exhibit 5-52 will display.

Exhibit 5-52: Users window

3. Click on the *Import Users* tab. An *Import Users* window like the one shown in Exhibit 5-53 will display.
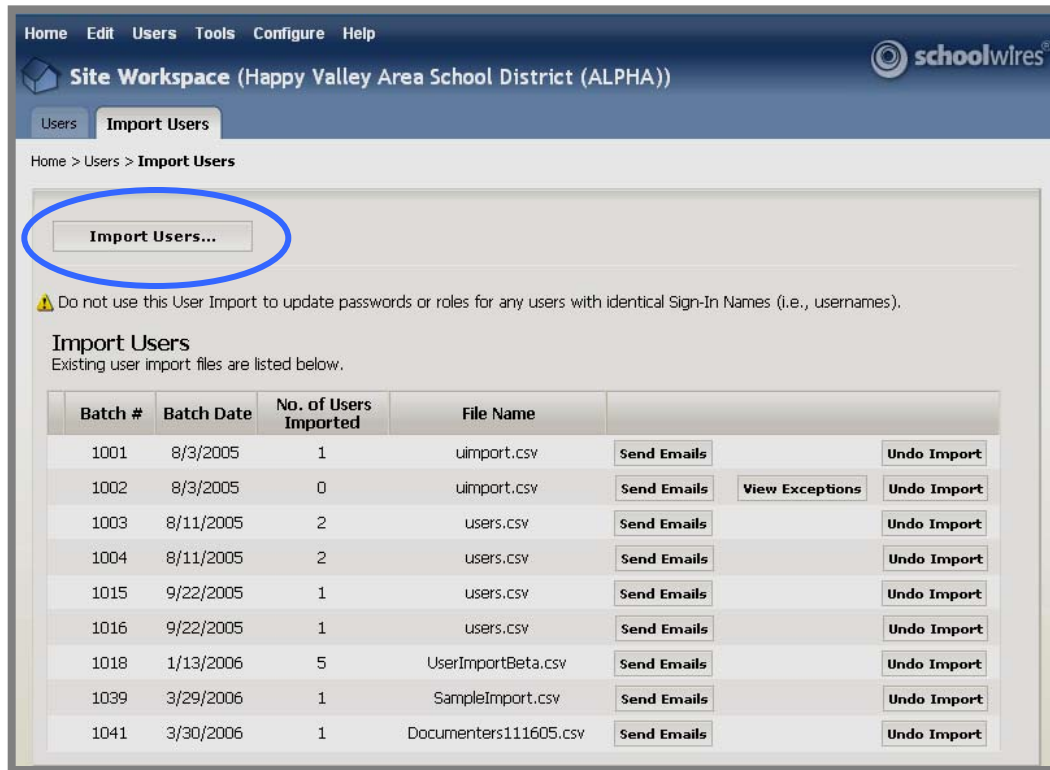
Exhibit 5-53: Import Users window

4. Click on the *Import Users* button at the top of the window. *Step 1 of the Import Wizard* will display as you see in Exhibit 5-54.
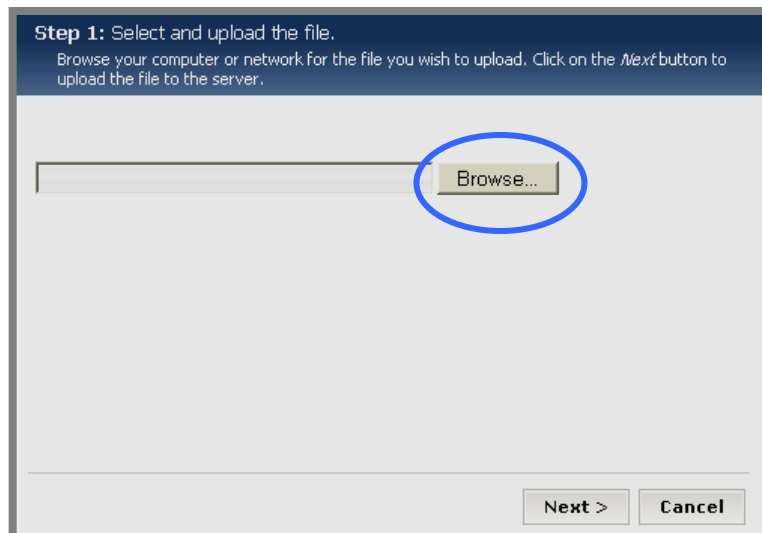
Exhibit 5-54: Step 1 of Import Wizard

5. Click on the *Browse* button. A *Browsing* window like the one shown in Exhibit 5-55 will display.
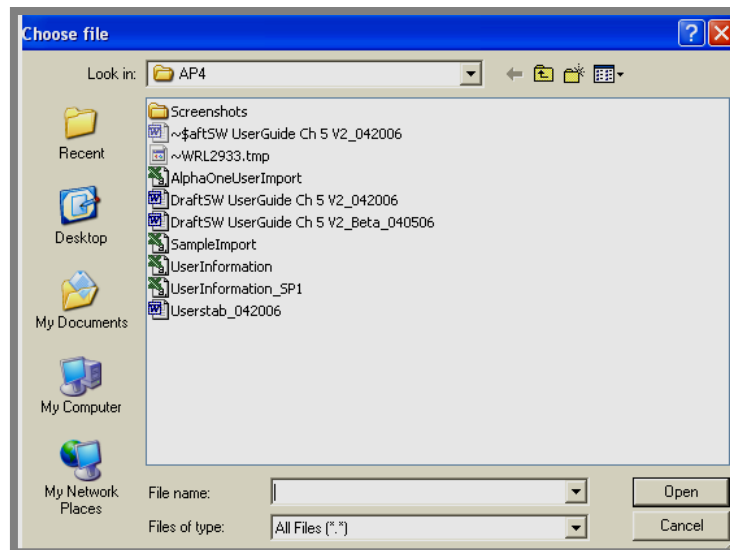
Exhibit 5-55: Browsing window

6. Browse your computer until you find the CSV file you created.

7. Select the file and click on the *Open* button. *Step 1 of the Import Wizard* will return as the active window. The path for the file you chose will display as you see in Exhibit 5-56.
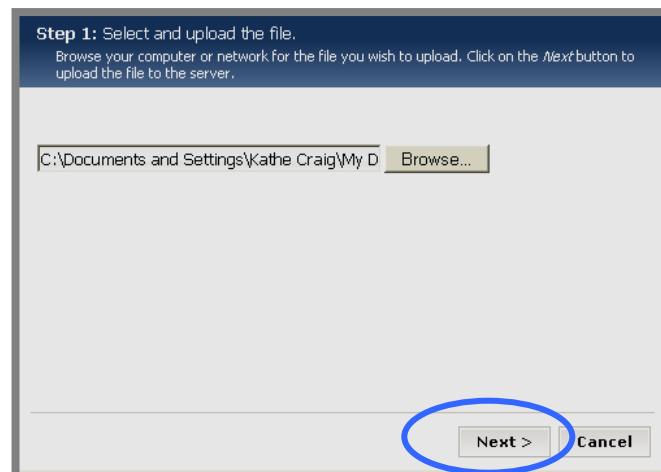
Exhibit 5-56: Step 1 of the Import Wizard

8. Click on the *Next* button. You will see a message that the file is uploading. Then *Step 2 of the Import Wizard* as you see in Exhibit 5-57 will display. It contains a message that the file has been successfully uploaded.
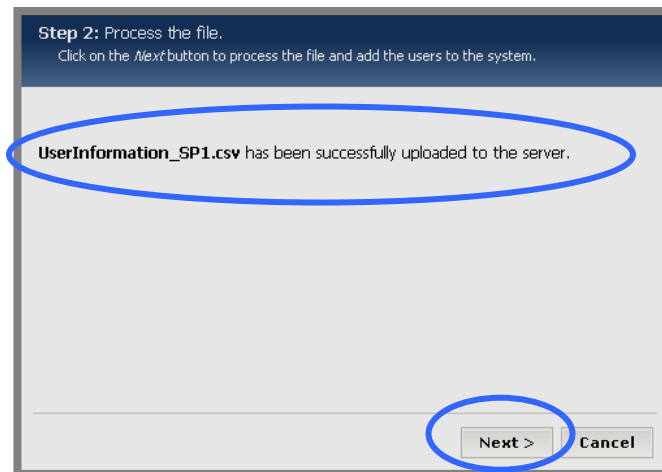
Exhibit 5-57: Step 2 of the Import Wizard

9. Click on the *Next* button.

   a. If the import failed completely, a message like the one shown in Exhibit 5-58 will display.
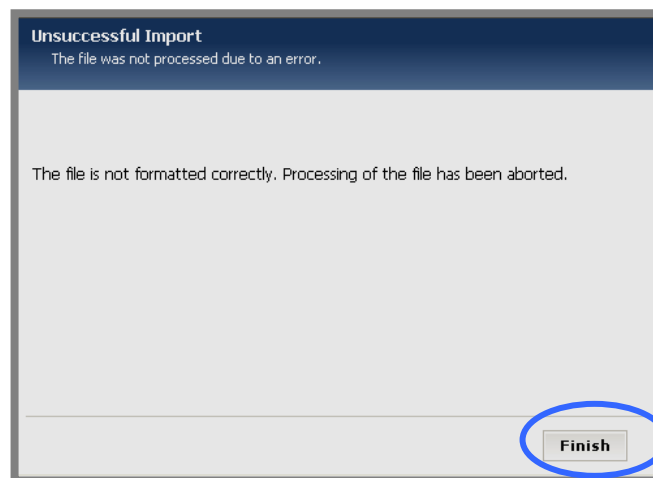
Exhibit 5-58: Unsuccessful Import

b. If the import was successful, a message like the one shown in Exhibit 5-59 will display.
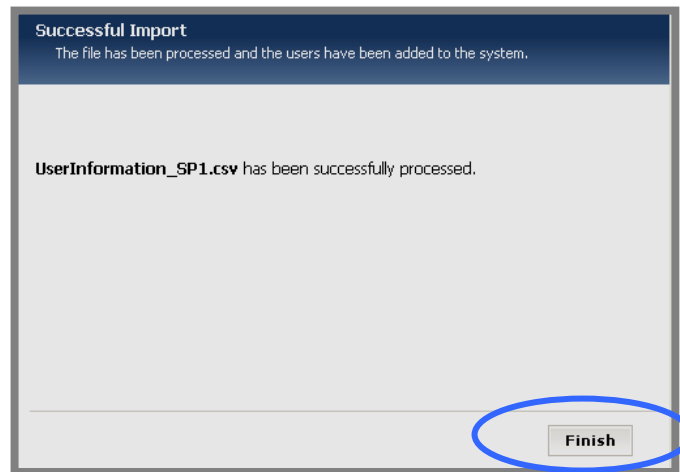
Exhibit 5-59: Successful Import

10. Click on the *Finish* button.

a. If the import was unsuccessful, the *Import* window will display and no additional imports will display.

b. If the import was successful, an *Import* window like the one shown in Exhibit 5-60 will display. The file you just imported will display.
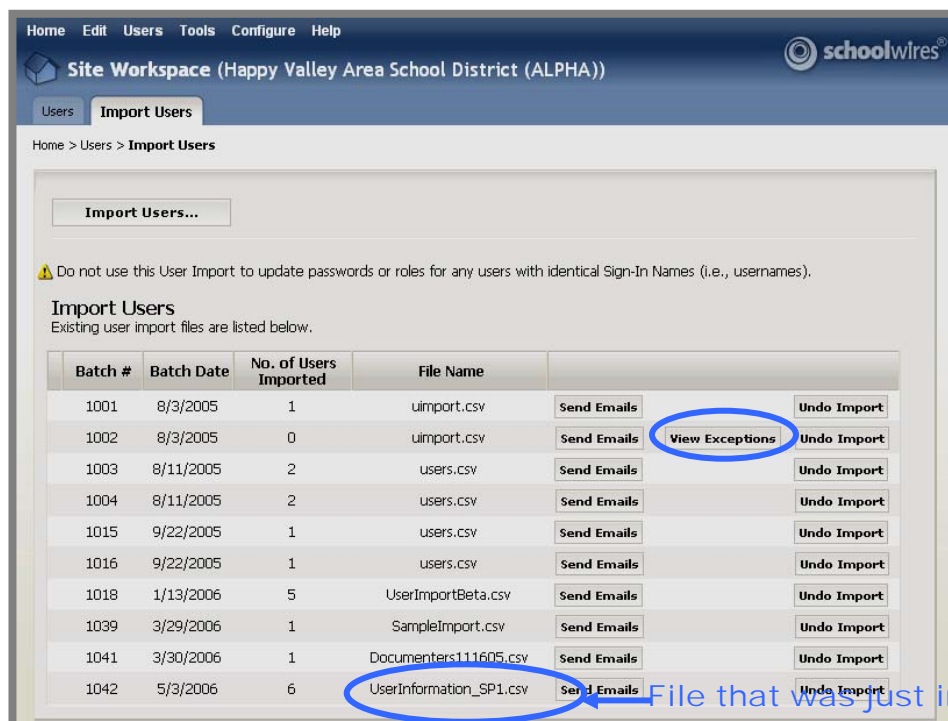
Exhibit 5-60: Import window after successful import

Viewing Exceptions

If any of the records fail to import, you will see a *View Exceptions* button to the right of the file as you can see in Exhibit 5-60. To view exceptions after the import, click on the *View Exceptions* button. A *View Exceptions* window like the one shown in Exhibit 5-61 will display.
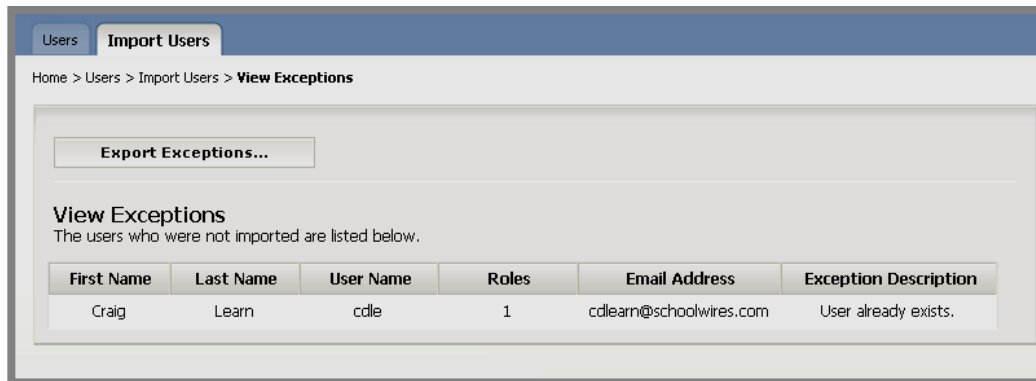
Exhibit 5-61: View Exceptions window

Notice that you can export the exceptions to make the corrections and import that file. To export the exceptions, click on the *Export Exceptions* button. Follow the instructions for exporting the entire user database provided earlier in this chapter.

Sending Emails to Users after Import

TIP: When you are importing users, do not send these emails until you are ready to assign editing privileges (e.g., Section Editors) and train the users.

To send the emails:

1. Click on the *Send Emails* button to the left of the file containing the users to whom you wish to send the confirmation emails with Sign-in Name and password. A confirmation window like the one shown in Exhibit 5-62 will display.
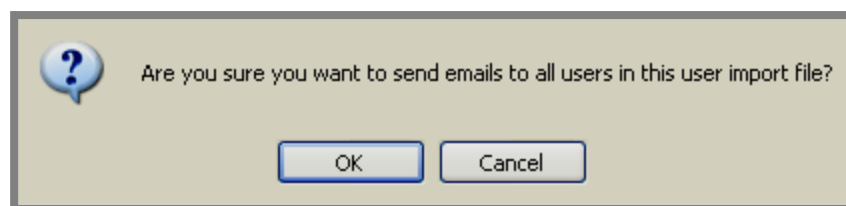
Exhibit 5-62: Send Emails confirmation window

2. Click the *OK* button. The *Import* window will refresh. The users will receive their confirmation emails.

Undoing an Import

⚠ **Warning:** When you undo an import, all users within that file will be removed from the database. They will not receive any notification of this change.

To undo an import:

1. Click on the *Undo Import* button to the right of the import you wish to undo. A confirmation window like the one shown in Exhibit 5-63 will display.
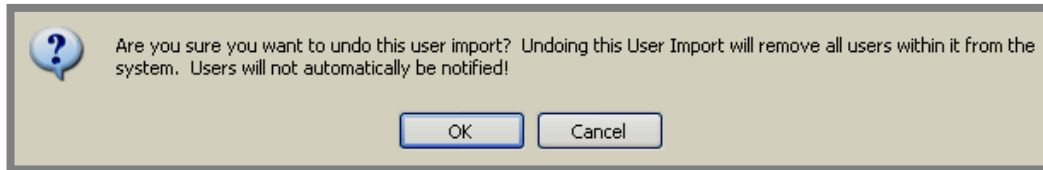
Exhibit 5-63: Undo Import confirmation window

2. Click the *OK* button. The *Import* window will refresh and that import file will no longer display. Those users will no longer be in the database.

Role Management Task

Assigning roles (viewing permissions) allows you to selectively display content based on these roles. In addition, if your organization has purchased the E-alerts enhancement module, you can use roles when distributing Broadcast E-alerts.

As previously discussed, you assign roles to users in their individual user profiles or when importing those users into the database. As you create content, you will be given opportunities to determine who can view that content. You do this by identifying roles (viewing permissions).

As a Site Director, you add and edit the roles that will be available to other editors using the *Role Management* task.

Adding a New Role

To add a new role:

1. Access the *Site Workspace*.

2. Click on the *Role Management* task from either the *Users* drop-down menu or the *User Management* tab. A *Roles* window like the one shown in Exhibit 5-64 will display.
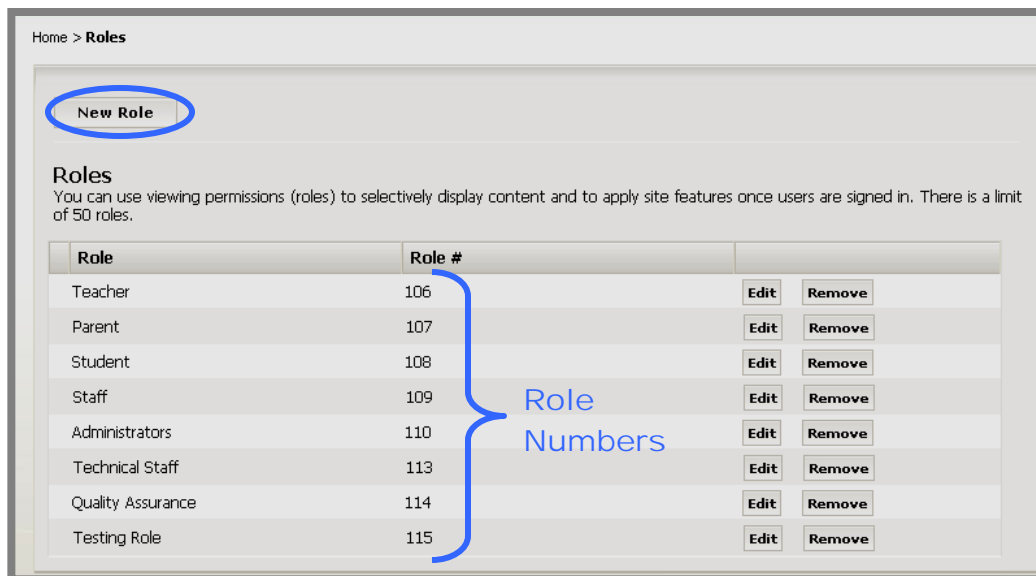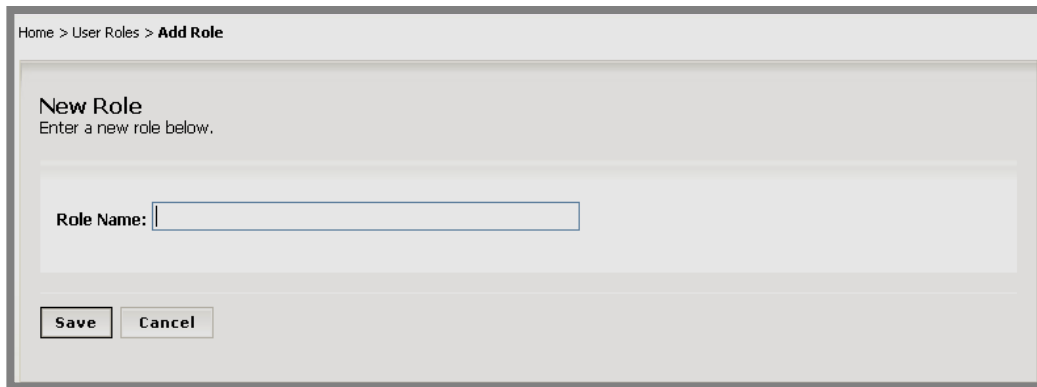
Exhibit 5-64: Roles window

4. Click on the *New Role* button on the top left of the window. A *New Role* window like the one shown in Exhibit 5-65 will display.

Home > User Roles > **Add Role**

New Role
Enter a new role below.

Role Name: |

Save   Cancel

Exhibit 5-65: New Role window
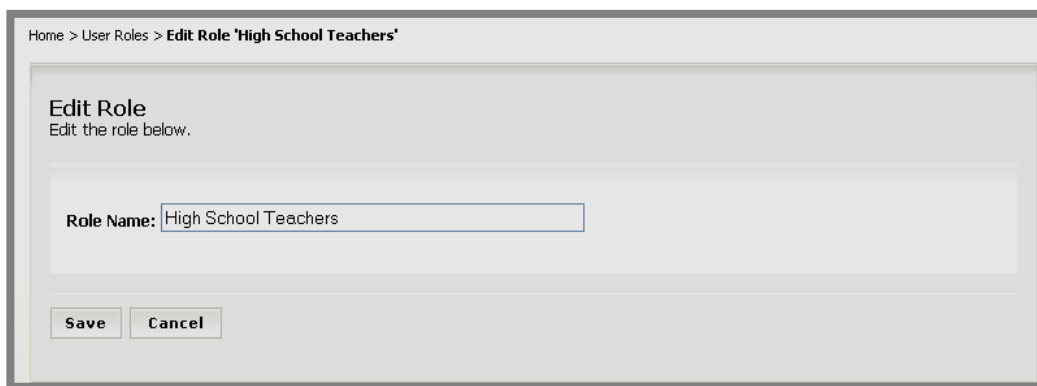
5. Enter a name for the role.

6. Click on the *Save* button. The *Roles* window will return as the active window. The role you just added will display on the list. The system will automatically assign a number to that role.

<u>Note</u>: You will only need the role numbers if you plan to import roles when you import users.

Editing a Role

To edit a role:

1. Click on the *Edit* button to the right of the role you wish to edit. An *Edit Role* window like the one shown in Exhibit 5-66 will display.

Home > User Roles > **Edit Role 'High School Teachers'**

Edit Role
Edit the role below.

Role Name: High School Teachers

Save   Cancel

Exhibit 5-66: Edit Role window

2. Edit the role name as required.

3. Click on the *Save* button. The *Roles* window will return as the active window. The role you just edited will display on the list with the new name.

Removing a Role

⚠ **Warning**: If users have already been assigned a role, removing that role will remove it from the users. Content that has been made visible only to that role will no longer be visible.

To remove a role:

1. Access the *Site Workspace*.

2. Click on the *Role Management* task from either the *Users* drop-down menu or the *User Management* tab. A *Roles* window like the one shown in Exhibit 5-64 will display.

3. Click on the *Remove* button to the right of the role you wish to remove. A confirmation window like the one shown in Exhibit 5-67 will display.

**Exhibit 5-67: Confirmation window for removing role**

4. Click the *OK* button. The *Roles* window will return as the active window. The role you just removed will no longer appear on the list.

Site Directors/Subsite Directors Tasks

As Site Director, you may need to assign people the editing privileges of a Site/Subsite Director or remove someone as a Site/Subsite Director.

Regardless of the editing privilege, you will assign users to it and remove users from it in the same manner. You will, however, perform the process in different places within **Site Manager**.

You will use the *Site Directors* task in the *Site Workspace* to assign or remove Site Directors. You will use the *Subsite Directors* task in the *Subsite Workspace* to assign or remove Subsite Directors for that *subsite*. A Subsite Director for that *subsite* can also assign or remove Subsite Directors.

TIP: Schoolwires recommends that you have at least two Site Directors, but no more than five. Schoolwires recommends that you have one to two Subsite Directors at each subsite.

You cannot actually change a user's level of editing privilege. You must remove that user from one level and reassign that individual at another.

Before you begin assigning individuals as Site Directors, be certain they are registered. If they are not registered, you must register them before proceeding. See *User Profiles* earlier in this chapter for more information on how to do this.

Assigning a Site Director/Subsite Director

⚠ **Important: You cannot assign Site Directors as Subsite Directors, Homepage Editors or Section Editors for the main *site* or any *subsite*.** As Site Directors they can already have these editing privileges. **You cannot assign Subsite Directors as Homepage Editors or Section Editors on their assigned subsite.** They can, however be assigned these privileges at other *subsites* or on the main *site*. The *names of Site Directors and Subsite Directors will be missing* when the list of users for assigning editing privileges displays if they are not eligible for that editing privilege.

⚠ **Warning:** Do not assign someone with a lower editing privilege as a Site Director or Subsite Director. That user profile may become corrupted if you do. To prevent this, remove that user from the lower editing privilege prior to assigning the Site or Subsite Director privilege.

To assign a Site Director or Subsite Director:

1. In the appropriate *Site* or *Subsite Workspace*, click on *Site* or *Subsite Directors* from the *Users* drop-down menu or on the *User Management* tab. A *Site* or *Subsite Directors* window like the one shown in Exhibit 5-68 will display. Notice the list of Current Directors.
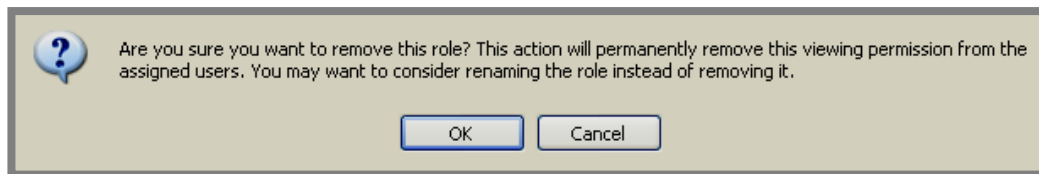
Exhibit 5-68: Site Directors window

2. Click on the *Assign Director* button on the top left of the window. A list of registered users like the one shown in Exhibit 5-69 will display.

   Note: A user must be registered before being assigned as a Site Director or Subsite Director.

Exhibit 5-69: List of users

3. Use the search tools, including the Last Name Filter, to locate the user you wish to assign.

4. Click on the *Select* button to the right of the name. The *Site* or *Subsite Directors* window will return as the active widow. The name you selected will appear in the list of Current Directors.

Removing a Site or Subsite Director

To remove a Site Director or Subsite Director:

1. In the appropriate *Site* or *Subsite Workspace*, click on *Site* or *Subsite Directors* from the *Users* drop-down menu or on the *User Management* tab. A *Site* or *Subsite Directors* window like the one shown in Exhibit 5-70 will display.
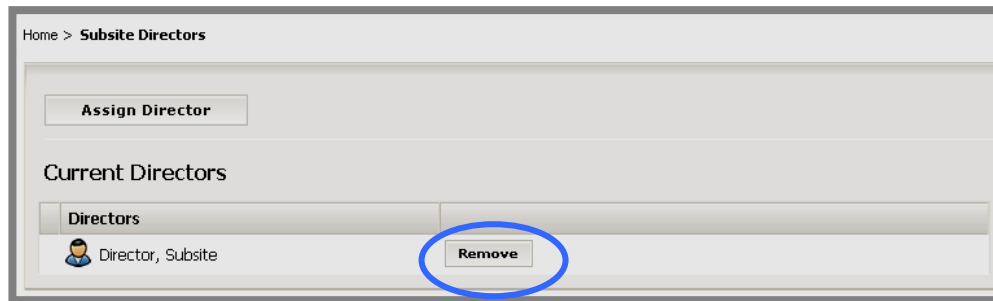
Exhibit 5-70: Subsite Directors window

2. Click on the *Remove* button to the right of the user you wish to remove as a Site or Subsite Director. A confirmation window like the one shown in Exhibit 5-71 will display.

    Note: The name of the user who is signed in will not have a *Remove* button to the right of it. This is evident in Exhibit 5-68.
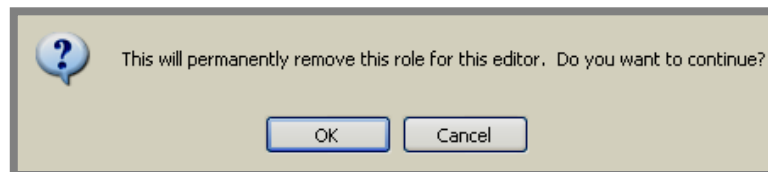
Exhibit 5-71: Confirmation window for deleting Director or Editor

3. Click on the *OK* button. The *Site* or *Subsite Directors* window will refresh. The user you removed as a Site or Subsite Director will no longer appear on the list of Current Directors.

Homepage Editors Task

In order to distribute responsibility for maintaining your website, you may wish to assign one or more people as Homepage Editors. You may also need to remove someone as a Homepage Editor. You will use the *Homepage Editors* task to do both of these things. It works the same way as the *Site Director* and *Subsite Directors* tasks.

Homepage Editors only have access to two tasks within the *Homepage Workspace*. These two tasks are:

Homepage
Clicking on this task brings up a template of the *site or subsite* homepage. Homepage Editors use this template to modify the content of the *site or subsite* homepage.

Calendar
Homepage Editors will use this task to add or edit events for the *site* or *subsite* calendar on the assigned *site* or *subsite*.

See *Edit Homepage Task* and *Edit Calendar Task* earlier in this chapter for more information on how Homepage Editors perform these tasks.

Assigning a Homepage Editor

To assign a Homepage Editor:

1. In the appropriate *Site* or *Subsite Workspace*, click on *Homepage Editors* from the *Users* drop-down menu or on the *User Management* tab. A *Homepage Editors* window like the one shown in Exhibit 5-72 will display.
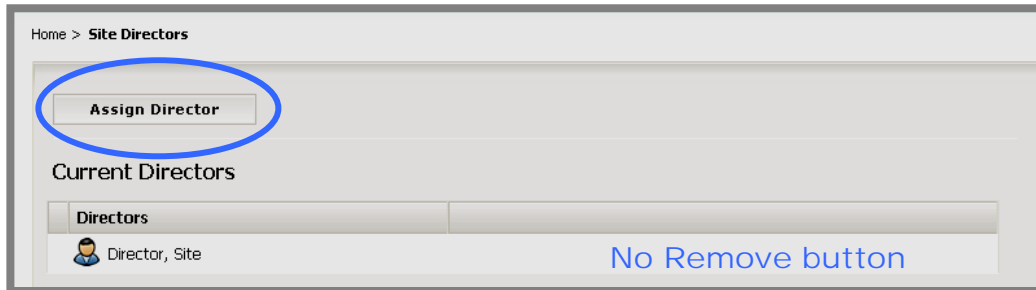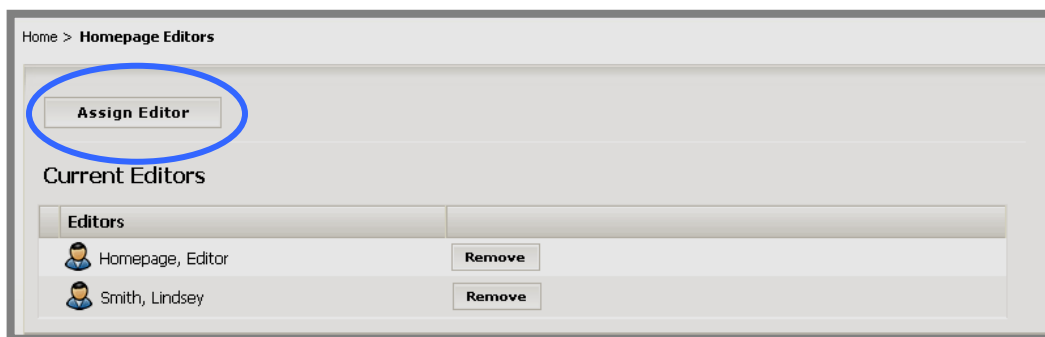

Exhibit 5-72: Homepage Editors window

2. Click on the *Assign Editor* button in the upper left of the window. A list of registered users like the one shown in Exhibit 5-69 will display.

    Note: A user must be registered before being assigned as a Homepage Editor.
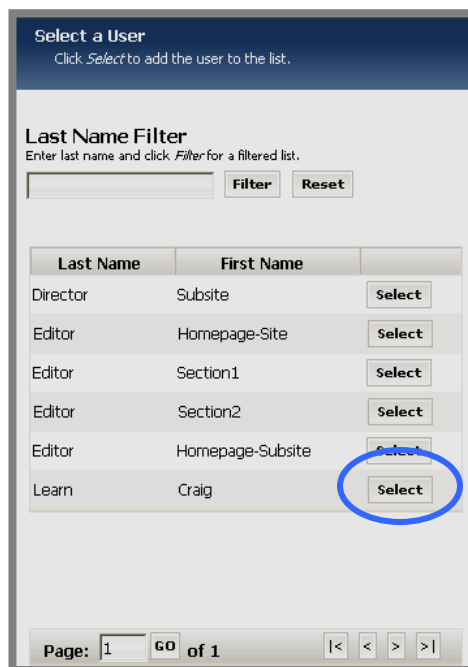
4. Use the search tools, including the Last Name Filter, to locate the user you wish to assign.

5. Click on the *Select* button to the right of the name. The *Homepage Editors* window will return as the active widow. The name you selected will appear in the list of Current Editors.

Removing a Homepage Editor

To remove a Homepage Editor:

1. In the appropriate *Site* or *Subsite Workspace*, click on *Homepage Editors* from the *Users* drop-down menu or on the *User Management* tab. A *Homepage Editors* window like the one shown in Exhibit 5-72 will display.

2. Click on the *Remove* button to the right of the user you wish to remove as a Homepage Editor. A confirmation window like the one shown in Exhibit 5-71 will display.

3. Click on the *OK* button. The *Homepage Editors* window will refresh. The user you removed as a Homepage Editor will no longer appear on the list of Current Editors.

Tools Tab

As you can see from Exhibit 5-73, on the *Tools* tab, you can access the following tasks:

- *Files & Folders*: Site Directors organize the files and folders used in their *sites* and in the Shared Library using this task. Subsite Directors organize the files and folders used in their *subsites* using this task.
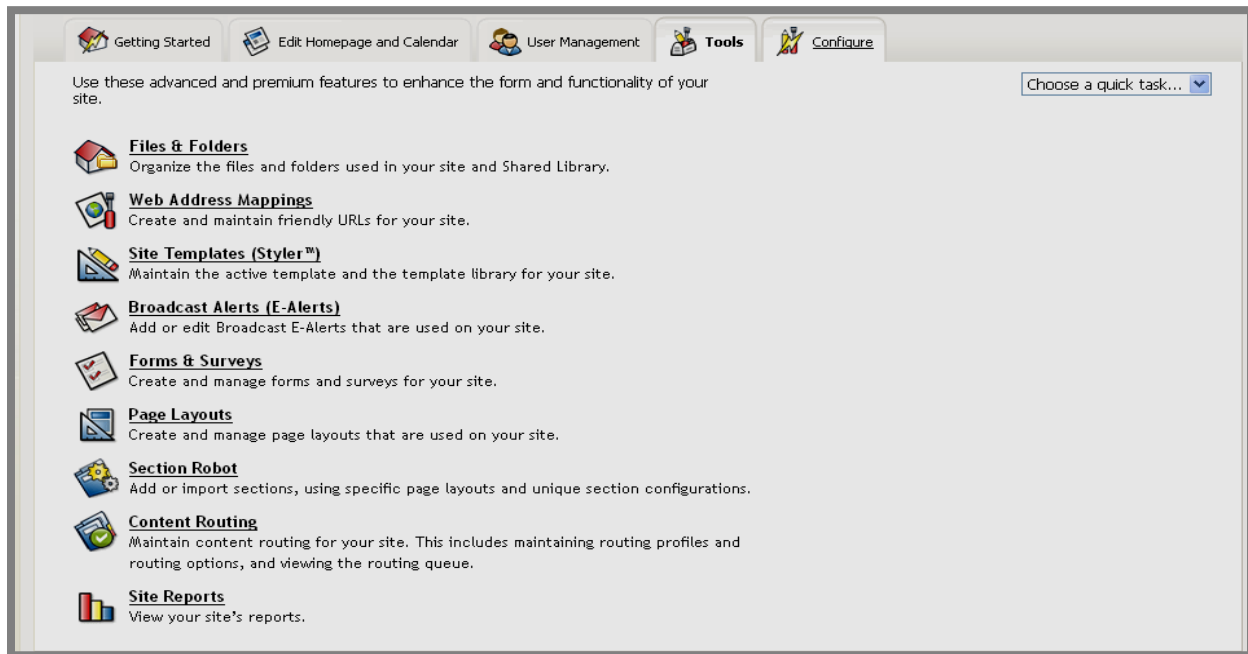
Exhibit 5-73: Tools tab

- *Web Address Mappings*: Site Directors create and maintain friendly URLs for the entire *site* using this task.

- *Site Templates* (**Styler**™): **Styler**™, an enhancement module, must have been purchased for this to be active in the *Site Workspace*. Site Directors maintain the active template and the template library for the *site* using this task. A Site Director must activate this task for *subsites* in order for a version of this task to appear in the *Subsite Workspace*. Subsite Directors can then apply available templates to their *subsites*.

- *Broadcast Alerts (E-Alerts)*: E-Alerts, an enhancement module, must have been purchased for this to be active. Site Directors and Subsite Directors add or edit Broadcast Alerts for their respective *sites* using this task.

- *Forms & Surveys*: Forms & Surveys, an enhancement module, must have been purchased for this to be active. Site Directors and Subsite Directors create and manage forms and surveys for their respective *sites* using this task.

- *Page Layouts*: Site Directors and Subsite Directors create and manage *page* layouts that are used on their respective *sites* using this task.

- *Section Robot*: Site Directors add or import *sections* to the *site* and *subsites* using this task.

- *Content Routing*: Site Directors and Subsite Directors maintain content routing for their respective *sites* using this task.

- *Site Reports*: Site Directors and Subsite Directors view reports for their respective *sites* using this task.

You can also access these tasks through the *Tools* drop-down menu shown in Exhibit 5-74.

Exhibit 5-74: Tools Drop-down Menu

Files & Folders Task

Each editor will use the *Files & Folders* task in the *Site*, *Subsite* or *Section Workspace* to upload and organize files for that *site*, *subsite* or *section*. It is an excellent tool for pre-planning the content of the *site*, *subsite* or *section*. Files for each *site, subsite* and *section* are uploaded to a different location on the server.

Files and folders are unique to each *site*, *subsite* or *section* and generally cannot be shared. The one exception to this is the Shared Library. This folder resides within *Files & Folders* in the *Site Workspace*. Only a Site Director may add files to the Shared Library. However, its contents may be accessed by any editor using the *Insert Wizards* in the **Schoolwires Editor**. The Shared Library is useful for storing commonly used files and images such as logos and Clip Art.

See Chapter 16: "Managing Files & Folders" for more information.

Web Address Mappings Task

The *Web Address Mappings* task allows Site Directors to create friendly URLs to be used on the End User. For instance if the Chess club has a URL of http://SchoolwiresAP4.schoolwires.com/98320125152415/site/default.asp, a friendly URL might be http://SchoolwiresAP4.schoolwires.com/Chess.

Adding a Mapping

To map a web address:

1. Access the *Site Workspace*.

2. Click on the *Web Address Mappings* task from the *Tools* drop-down menu or on the *Tools* tab. A *Web Address Mappings* window like the one shown in Exhibit 5-75 will display.
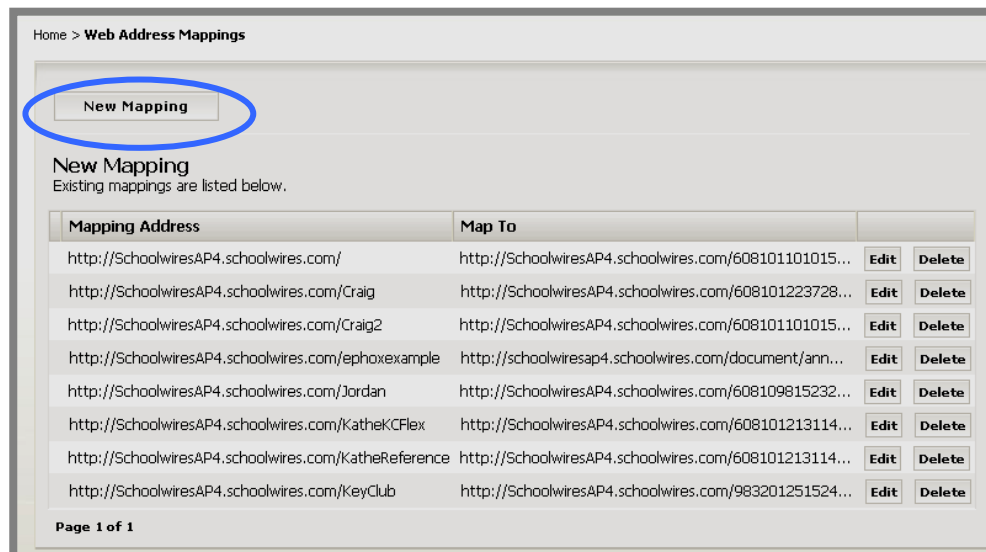
Exhibit 5-75: Web Address Mappings window

3. Click on the *New Mapping* button on the top left of the window. A *New Mapping* window like the one shown in Exhibit 5-76 will display.
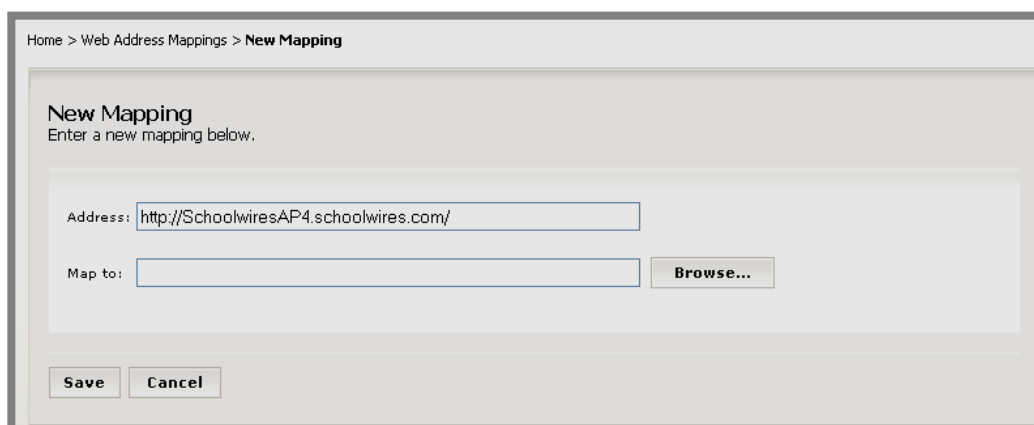
Exhibit 5-76: New Mapping window

4. Type in the friendly URL after the final / in the Address field.

5. Click on the *Browse* button to browse your website for the *page* to which you want to map. *Step 1 of the Link Wizard* will display as you see in Exhibit 5-77.
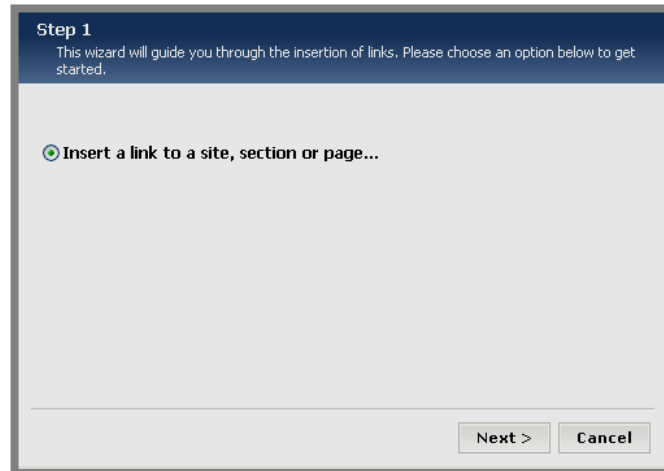
Exhibit 5-77: Step 1 of Link Wizard

6. Click on the *Next* button. *Step 2 of the Link Wizard* will display as you see in Exhibit 5-78.
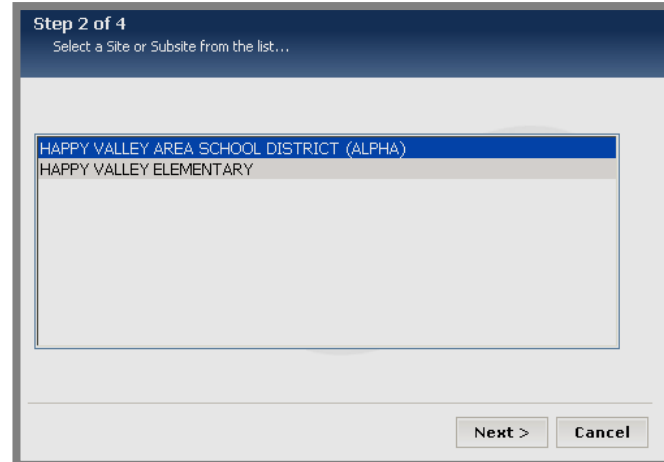
Exhibit 5-78: Step 2 of the Insert Wizard

7. Highlight the *site* or *subsite* that contains the *page* to which you wish to map.

8. Click on the *Next* button. *Step 3 of the Link Wizard* will display as you see in Exhibit 5-79.
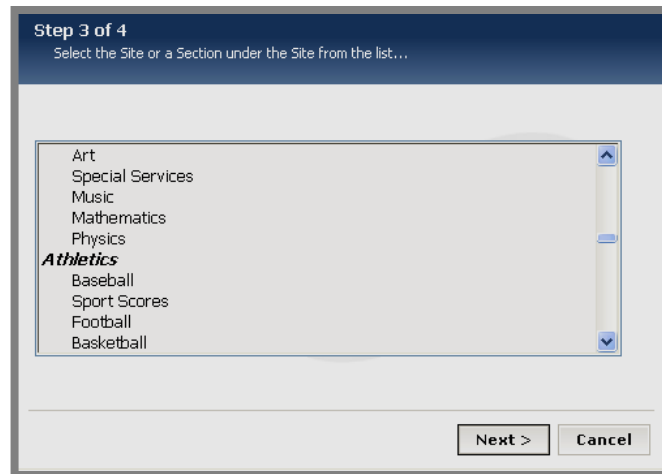
Exhibit 5-79: Step 3 of the Link Wizard

9. Highlight the *site*, *subsite* or *section* that contains the *page* to which you want to map.

10. Click on the *Next* button.

    a. If you chose a *section*, *Step 4 of the Link Wizard* will display as you see in Exhibit 5-80.
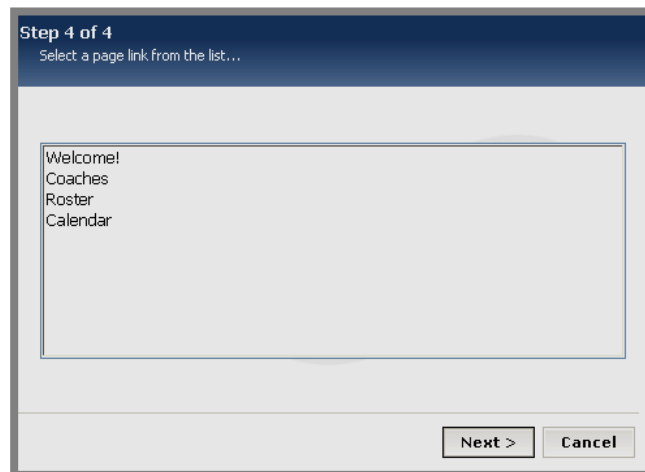
Exhibit 5-80: Step 4 of the Link Wizard

    b.   If you chose a *site*, *Step 5 of the Link Wizard* will display as you see in Exhibit 5-81 and you will skip to Step 13 of these instructions.
        Note: You will be linking to the homepage of that *site* or *subsite*.

11. Highlight the *page* to which you want to map.

12. Click the *Next* button. S*tep 5 of the Link Wizard* t will display as you see in Exhibit 5-81.
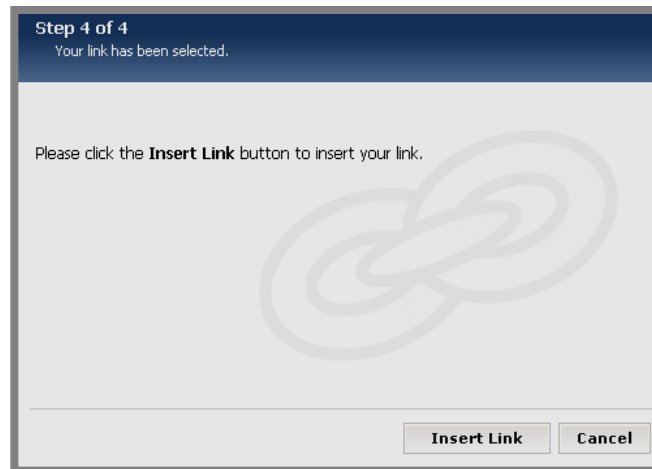
Exhibit 5-81: Step 5 of the Link Wizard

13. Click on the *Insert Link* button. The *New Mapping* window like the one shown in Exhibit 5-82 will return as the active window. It will be populated with the URL for the *page* to which you wish to map.
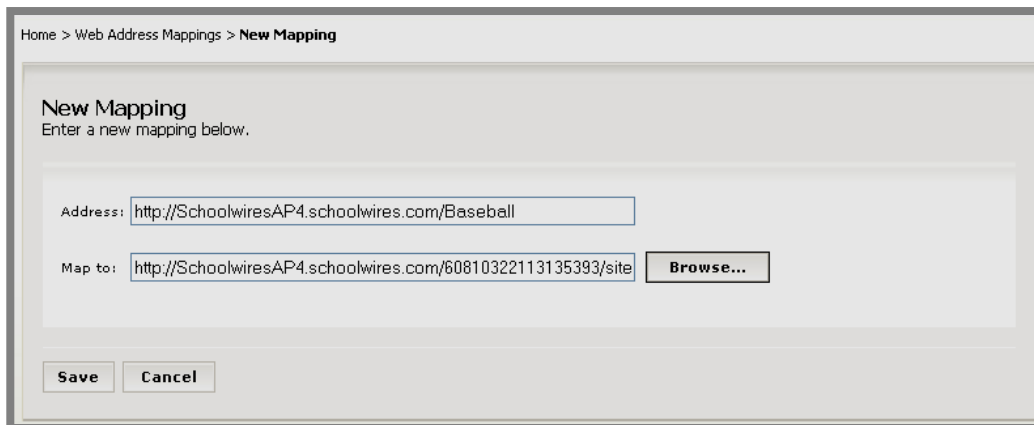

Exhibit 5-82: Populated New Mapping window

14. Click on the *Save* button. The *Web Address Mappings* window will return as the active window. The mapping you just completed will display on the list. Users can enter the friendly URL and get to the *page* to which you mapped it.

Editing a Mapping

To edit a web address mapping:

1. Access the *Site Workspace*.

2. Click on the *Web Address Mappings* task from the *Tools* drop-down menu or on the *Tools* tab. A *Web Address Mappings* window like the one shown in Exhibit 5-83 will display.

Exhibit 5-83: Web Address Mappings window

3. Click on the *Edit* button to the right of the mapping you want to edit. An *Edit Mapping* window like the one shown in Exhibit 5-84 will display.
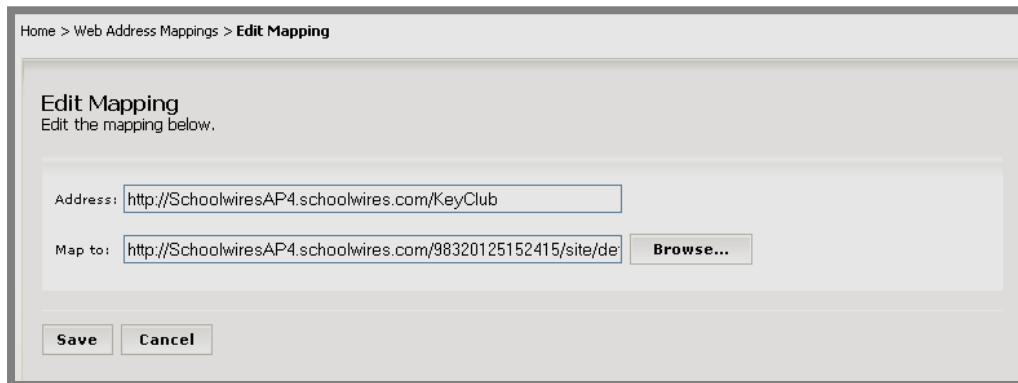
Exhibit 5-84: Edit Mapping window

4. Make the required changes.

5. Click on the *Save* button. The *Web Address Mappings* window will return as the active window. The mapping you just edited will display with the new mapping. Users can enter the friendly URL and get to the *page* to which you mapped it.

Deleting a Mapping

To delete a web address mapping:

1. Access the *Site Workspace*.

2. Click on the *Web Address Mappings* task from the *Tools* drop-down menu or on the *Tools* tab. A *Web Address Mappings* window like the one shown in Exhibit 5-83 will display.
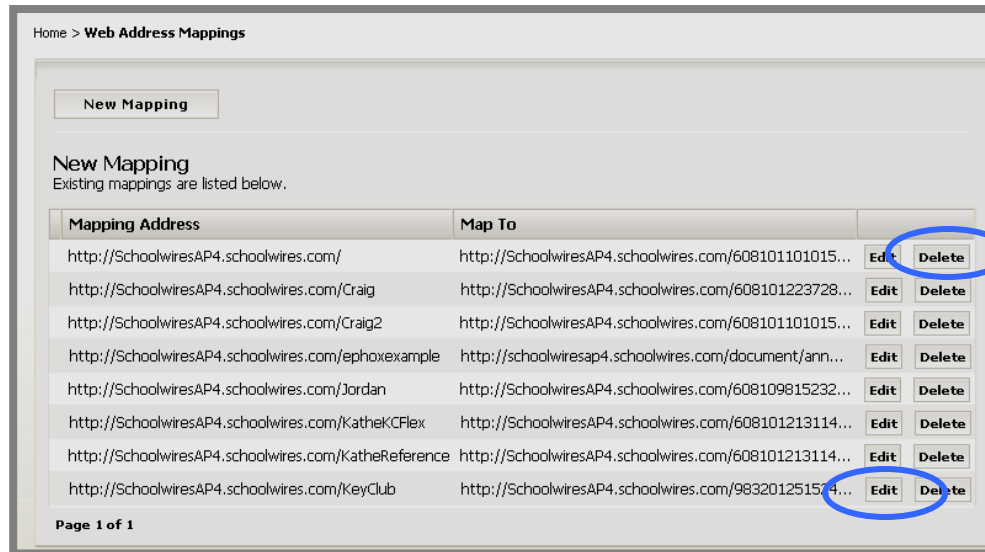
3. Click on the *Delete* button to the right of the mapping you want to delete. The *Web Address Mappings* window will refresh. The mapping you just deleted will not display on the list.

Site Templates (Styler™) Task

Schoolwires Styler™ is an enhancement module that allows Site Directors to design, edit and manage templates, to import and export templates and to otherwise control the look and feel of their *sites* and *subsites*.

If enabled by the Site Director, **Styler**™ also allows Subsite Directors to apply templates to their assigned *subsites*.

See Chapter 11: "Using **Schoolwires Styler**™" for more information on working with **Styler**™ and templates.

Broadcast E-Alerts Task

The *Broadcast E-Alerts* task is a function of E-Alerts, an enhancement module. This module gives your organization access to two different kinds of E-alerts:

- *Broadcast E-Alerts*: Site Directors and Subsite Directors access these through the *Broadcast Alerts* (*E-Alerts*) task within the *Site* or *Subsite Workspace* and allow them to send an email message to specific email addresses or to group(s) of users assigned the same viewing permissions (roles).

- *Content E-Alerts*: These allow editors to send email notification to subscribers whenever the editors make significant changes to *pages* within *sections* or to the homepage or calendar. The email message that users receive contains a link to the actual *section* or homepage, allowing them immediate and direct access. *Content E-Alerts* are activated from within the **Schoolwires Editor** and do not require the use of the *Broadcast Alerts* task within the *Site* or *Subsite Workspace*.

See Chapter 10: "Using E-Alerts" for more information about *Broadcast E-Alerts* and *Content E-Alerts* as well as Chapter 8: "Working with the **Schoolwires Editor**" for more information about *Content E-Alerts*.

Forms & Surveys Task

Forms & Surveys is an enhancement module that enables you to create forms and surveys for your organization. You will be able to:

- Design forms and surveys.

- Develop and apply styles to enhance the look and feel of the forms and surveys.

- Create and maintain libraries of items (questions) for use on future forms and surveys.

- Display forms and surveys on your website for completion by users.

If your organization has purchased this enhancement module, this task will be active in the:

- *Site Workspace*

- *Subsite Workspace*

- *Section Workspace* if activated in the *section* options in the *section* configuration or the *Channel Workspace*. See Chapter 15: "Section Management" for more information about setting *section* options in *section* configurations and Chapter 6: "**Site Manager**—Channel Workspace" for more information on setting *section* options in the *Channel Workspace*.

See Chapter 12: "Managing Forms and Surveys" for more information about this enhancement module.

Page Layouts Task

The **Schoolwires** Section Management suite contains three tools. They appear in the workspace as tasks. The three tasks are:

- *Page Layouts* (available in *Site* and *Subsite Workspaces*)

- *Section Configurations* (available in *Site Workspace* only)

- *Section Robot* (available in *Site Workspace* only)

Page Layouts allows Site Directors and Subsite Directors to create *page* layouts, which are *pages* that are pre-populated with content to assist editors in adding content.

Site Directors may create as many *page* layouts they desire for:

- *Section* homepages (i.e., Overview *page*), used by Site Directors when creating *section* configurations.

- *Flex Pages*, used by Site Directors when creating *section* configurations and by editors when adding *Flex Pages* to *sections*.

Subsite Directors may create as many *page* layouts for *Flex Pages* used by editors when adding *Flex Pages* to *sections*.

See Chapter 15: "Section Management" for more information on *page* layouts and their relationship to *Section Configurations* and *Section Robot*.

Section Robot Task

The **Schoolwires** Section Management suite contains three tools. They appear in your workspace as tasks. The three tasks are:

- *Page Layouts* (available in *Site* and *Subsite Workspaces*)

- *Section Configurations* (available in *Site Workspace* only)

- *Section Robot* (available in *Site Workspace* only)

The *Section Robot* allows Site Directors to:

- Add a single *section* and choose the *site* or *subsite* and *channel* to which to add it as well as the desired *section* configuration for that *section*.

- Import multiple *sections* and assign them to different *sites*, *subsites* and *channels*. Site Directors will assign a *section* configuration to the *sections* during the import.

See Chapter 15: "Section Management" for more information on *page* layouts and their relationship to *Section Configurations* and *Section Robot*.

Content Routing Task

Through **Site Manager**, you can route content for approval prior to posting it on your *site* or *subsite*. This provides you with the ability to monitor the content being posted while distributing the work of content creation to others in your organization.

You can set up routing to require approval at up to nine levels. Within each level you can have up to three people functioning as approvers. However, the approval of only one person is required in order to move the content to the next level of approval (or upload it to the website if you are at the highest level or have only one level). Additional approvers back up the primary approver.

Though content routing is a powerful tool, it should be applied judiciously. The number of levels of approval and approvers at each level will affect how long it takes for content to be activated on your website. Content providers may become frustrated by long lead times, particularly when the material is time-sensitive.

Only Site Directors can activate content for the main *site* and all *subsites*, while Subsite Directors can activate it on their assigned *subsites*. Once content routing is activated, everyone except editors who have been exempted must route content for approval.

See Chapter 14: "Using Content Routing" for more information.

Site Reports Task

Site Directors and Subsite Directors will use the *Site Reports* task to view and print reports that will help manage the *site* and *subsites*.

Viewing a Report

To view a report:

1. Access your *Site* or *Subsite Workspace*.

2. Click on the *Site Reports* task from the *Tools* drop-down menu or on the *Tools* tab. A *Site Reports* window like the one shown in Exhibit 5-85 will display. As you can see, you can view four different reports:
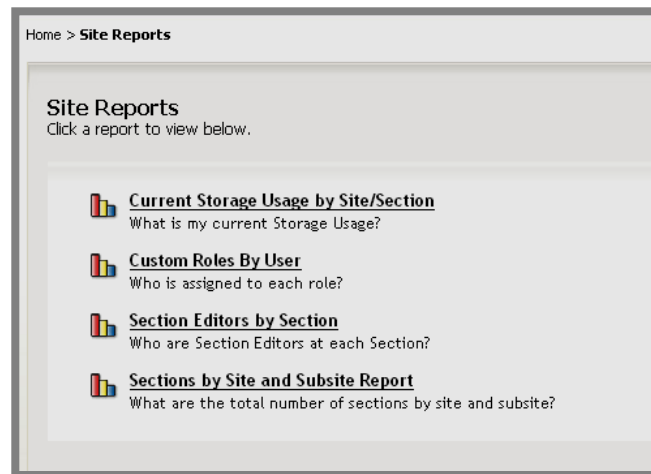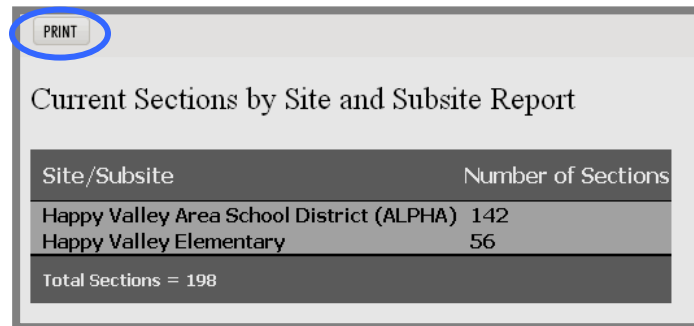

Exhibit 5-85: Site Reports window

- Current Storage Usage by Site/Section

- Custom Roles by User

- Section Editors by Section

- Sections by Site and Subsite Report

Note: If you are working in a *Subsite Workspace*, you will only see the information pertinent to that *subsite* on all the reports except "Custom Roles by User."

3. Click on the title of the report you want to view. The report will display. In Exhibit 5-86, the "Sections by Site and Subsite Report" for a main *site* is displayed.

Exhibit 5-86: Current Sections by Site and Subsite Report

Printing a Report

To print a report:

1. Access your *Site* or *Subsite Workspace*.

2. Click on the *Site Reports* task from the *Tools* drop-down menu or on the *Tools* tab. A *Site Reports* window like the one shown in Exhibit 5-85 will display.

3. Click on the title of the report you want to view. The report will display. In Exhibit 5-86, the "Sections by Site and Subsite Report" is displayed.

4. Click on the *Print* button in the top left of the report. Your printer dialog box will display.

5. Choose your printing options.

6. Click on the *Print* button. The report will print.

Configure Tab

Exhibit 5-87 shows the expanded *Configure* tab as it appears in the *Site Workspace*. Exhibit 5-88 shows it as it appears in the *Subsite Workspace.*
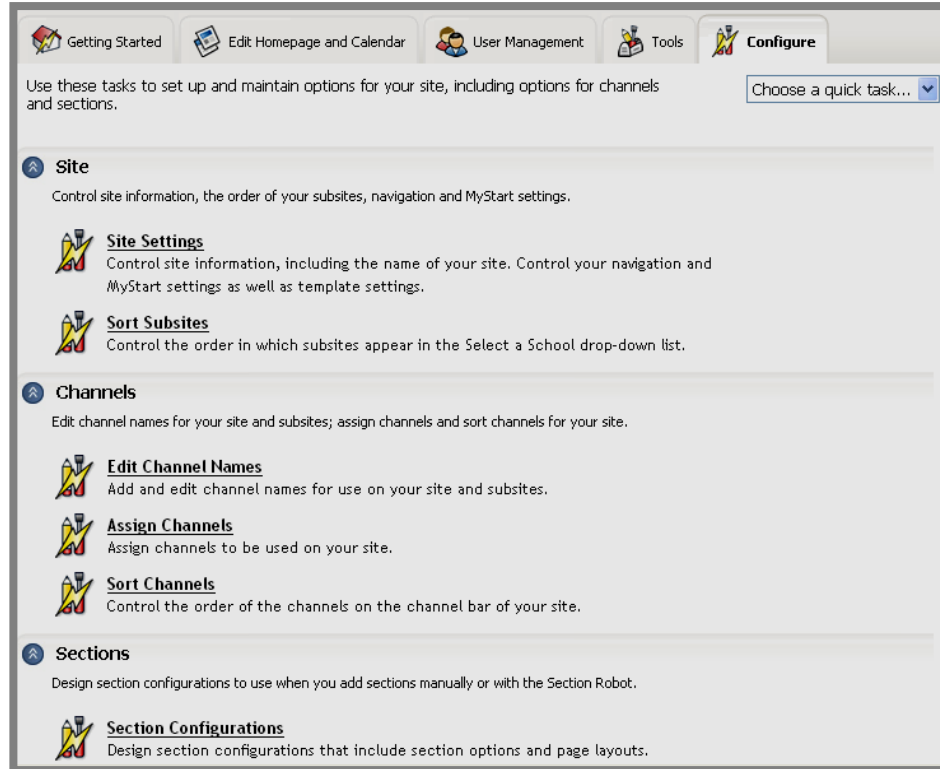

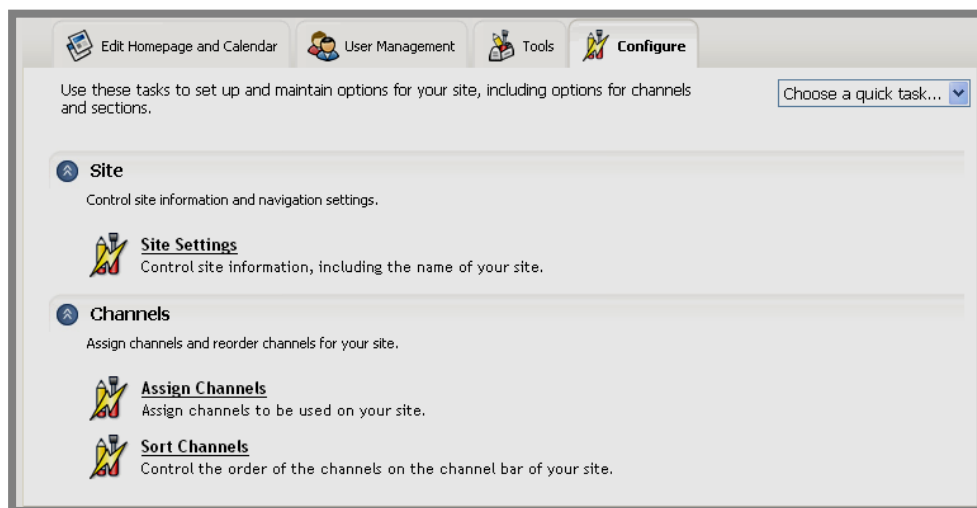**Exhibit 5-87: Configure tab in Site Workspace**

Exhibit 5-88: Configure tab in Subsite Workspace

As you can see, *Section Configurations* is only available in the *Site Workspace*. In addition, Subsite Directors do not have access to all the same tasks or subtasks that Site Directors can access in the *Site Workspace*.

You can also access the configuration tasks from the *Configure* drop-down menu as shown in Exhibit 5-89.

Exhibit 5-89: Configure drop-down menu

Site Configuration Tasks

Site Settings

Both the *Site Workspace* and the *Subsite Workspace* contain the *Site Settings* subtask of *Site Configurations*. To set *Site Settings*:

1. Access the *Site* or *Subsite Workspace*.

2. Click on the *Site* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on the *Site Settings* task from either the *Configure* drop-down menu or the *Configure* tab.

   - In the *Site Workspace*, a *Site Settings* window like the one shown in Exhibit 5-90 will display.

   - If the *Site Settings* task for a *subsite* is accessed by a Site Director, a *Site Settings* window like the one shown in Exhibit 5-91 will display.

   - If the *Site Settings* task for a *subsite* is accessed by a Subsite Director, a *Site Settings* window like the one shown in Exhibit 5-92 will display. As you can see, the *Site Settings* task for a Subsite Director does not have a *General* tab.

   a. On the *General* tab, the Site Director can change:

      i. The name of the *site* or *subsite*.

      ii. The contact information for the entire website. This will appear in error messages. The email address associated with *Questions & Feedback* in the footer is the one entered here.

Exhibit 5-90: Site Settings in Site Workspace

Exhibit 5-91: Site Settings on Subsite accessed by Site Director

Exhibit 5-92: Site Settings for Subsite accessed by Subsite Director

Exhibit 5-93: Template Settings tab in Site Workspace

b. The *Template Settings* tab will only display if your organization has purchased **Styler™**. On the *Template Settings*:

    i. The Site Director can set template control to the *Subsite* Level. This will display a *Site Templates* (*Styler™*) task in *subsite* workspace*s* and allow Subsite Directors to apply shared templates to their *subsites*.

    ii. Site Directors and Subsite Directors can restrict formatting for the entire *site* or a single *subsite*. This means that editors will only be able to select certain styles to apply to their text. See Chapter 8: "Working with the **Schoolwires Editor**" for more information.

⚠ **Important**: You will need to change the settings for restricting formatting for all *sections* created before this setting was changed manually.

In addition, the *section* configuration determines the settings for restricting formatting on all *sections* using that configuration. This setting cannot be overridden by *site*/*subsite* settings. In order to assure that the settings for *sections* created after *site*/*subsite* settings are changed, the restrict formatting option must be changed on that s*ection* configuration as well.

Home > **Site Settings**

Site Settings
Control site information, including the name of your site. Control your navigation and MyStart settings as well as template settings if you have Styler™.

| General | Template Settings | **Navigation Settings** | MyStart Settings |

Directory Type :
Choose the type of format for your directory pages.

- ○ One Column
- ○ One Column with Alphabetical Grouping
- ○ Two Columns
- ○ Two Columns with Alphabetical Grouping
- ○ Three Columns
- ◉ **Three Columns with Alphabetical Grouping**

Display menu when only one Section appears under a channel?
To display a drop-down when only section appears click Display Menu or Do Not Display Menu.

- ○ Do Not Display Menu
- ◉ **Display Menu**

⚠ This option requires publishing of your active template.

[Save] [Cancel]

Exhibit 5-94: Navigation Settings tab: same in Site & Subsite Workspaces

c. Though there are fewer tabs in *Site Settings* task when a Subsite Director accesses it, the *Navigation Settings* tab shown in Exhibit 5-94 is the same for both Site Directors and Subsite Directors. On the *Navigation Settings* tab, you set:

   i. The directory type: the way any directory *pages* (created when you have 15 or more *sections*) will display on the End User.

   ii. Whether to display a *section* drop-down list from the *channel* when there is only one *section* in that *channel*.
   Note: you will need to re-publish your template for this setting to take effect.

d. The *MyStart Settings* tab shown in Exhibit 5-95 is only available to Site Directors in the *Site Workspace*. On the *My Start* tab, Site Directors can:

    i.   Show or hide the *Register* button on the End User.

Exhibit 5-95: MyStart Settings tab in Site Workspace

    ii.   Show or hide the *subsite* list (i.e., Select a School) on the End User.

Sorting Subsites

Site Directors can change the order in which the *subsites* appear on *Select a School* drop-down list by sorting the *subsites*. To sort *subsites*:

1. Access the *Site Workspace*.

2. Click on the *Site* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on *Sort Subsites* from either the *Configure* drop-down menu or the *Configure* tab. A *Sort Subsites* window like the one shown in Exhibit 5-96 will display.

Exhibit 5-96: Sort Subsites
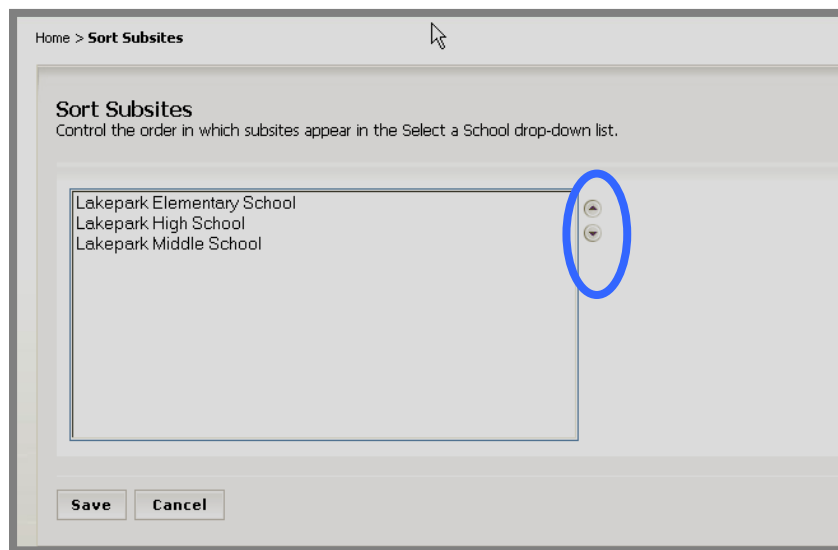
4. Highlight a *subsite*.

5. Use the up and down arrows until the *subsites* are in the desired order.

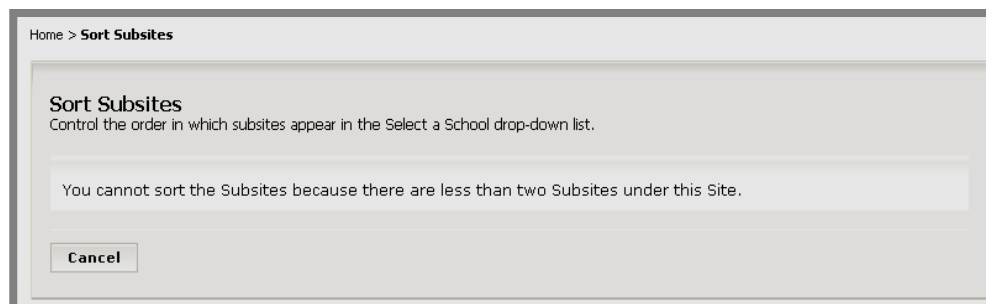6. Click the *Save* button. The *subsites* will appear in the desired order on the *Select a School* drop-down list.

Exhibit 5-97: Only 0ne Subsite

Note: If you try to sort *subsites* when you only have one *subsite*, you will see the message displayed in Exhibit 5-97.

Channels Configuration Tasks

The main *site* and each *subsite* may have different *channels* from one another. Site Directors and Subsite Directors at each *subsite* may sort the assigned *channels* to control the order in which they appear on the *Channel* bar. However, only a Site Director may edit the *channel* names. This is done in the *Site Workspace*. Exhibit 5-98 shows the *Channel Configuration* subtasks available in the *Site Workspace*.
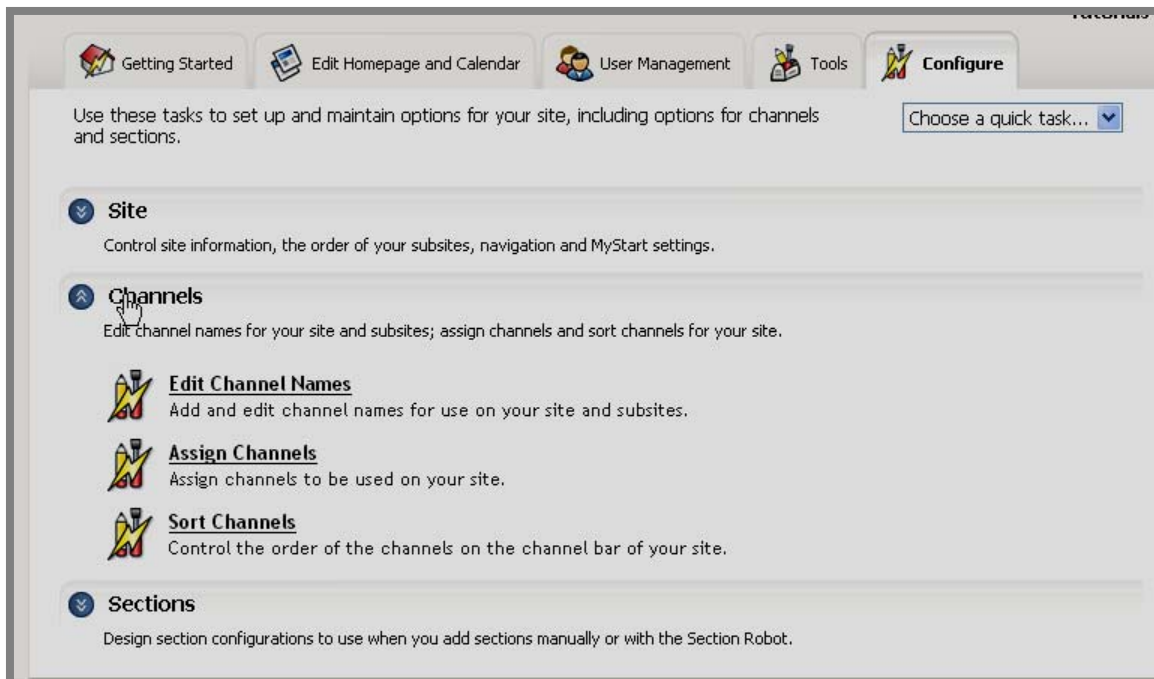
Exhibit 5-98: Channels task in Site Workspace

Editing Channel Names

If you are using a text-based template, editing the *channel* names is all that is required. If you are using an image-based template, however, you will need to create *channel* images and upload them to your template. See Appendix A for more information. *Channel* names you add/edit here will be available for assignment on the main *site* and all *subsites*.

TIP: You want to minimize horizontal scrolling for the visitors to your website. Consequently, you should limit the number of channels assigned to between eight and ten. This will vary depending on your template and the length of the channel names.

Schoolwires recommends that you plan the number and names of the channels that you will use throughout the website. For instance, will you use Faculty or Teachers for a teacher channel? Having the same name throughout the website will help visitors navigate.

Adding a Channel Name

To add a new *channel* name for use on the main *site* and all *subsites*:

1. Access the *Site Workspace*.

2. Click on the *Channels* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on *Edit Channel Names* from either the *Configure* drop-down menu or the *Configure* tab. An *Edit Channel Names* window like the one shown in Exhibit 5-99 will display.
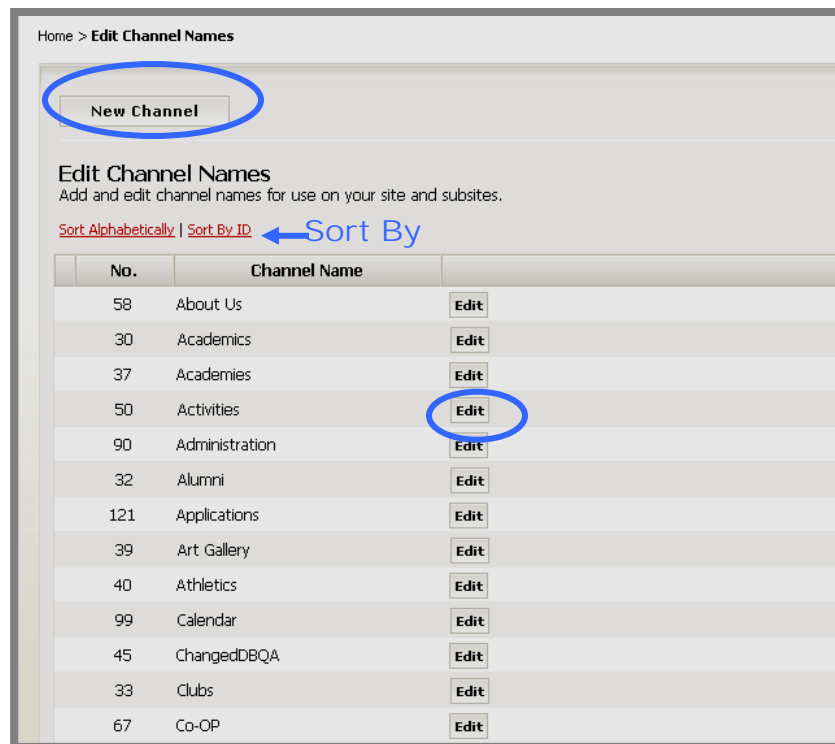
Exhibit 5-99: Edit Channel Names window

4. Click on the *New Channel* button on the top left of the window. A *New Channel* window like the one shown in Exhibit 5-100 will display.

Exhibit 5-100: New Channel window

5. Enter a name for the *channel*.

6. Click on the *Save* button. The *Edit Channel Names* window will return as the active window. The new *channel* will display on the list.

Sorting Channel Names

You can sort the *channel* names as they appear in the *Edit Channel Names* window (Exhibit 5-99).

1. To sort alphabetically, click on the *Sort Alphabetically* link. The *Edit Channel Names* window will refresh and the *channel* names will be in alphabetical order.

2. To sort by *channel* ID, click on the *Sort by ID* link. The *Edit Channel Names* window will refresh and the *channel* names will be in order of the *channel* ID numbers generated by the system. You will need the ID numbers for the *channels* only if you need to create *channel* imagery or will be doing a section import using the *Section Robot*. See Appendix A for information about creating *channel* imagery and Chapter 15: "Section Management" for more information about the *Section Robot*.

Editing Channel Names

To edit a *channel* name for use on the main *site* and all *subsites*:

1. Access the *Site Workspace*.

2. Click on the *Channels* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on *Edit Channel Names* from either the *Configure* drop-down menu or the *Configure* tab. An *Edit Channel Names* window like the one shown in Exhibit 5-99 will display.

4. Click on the *Edit* button to the right of the *channel* name you want to edit. An *Edit Channel Name* window like the one shown in Exhibit 5-101 will display.
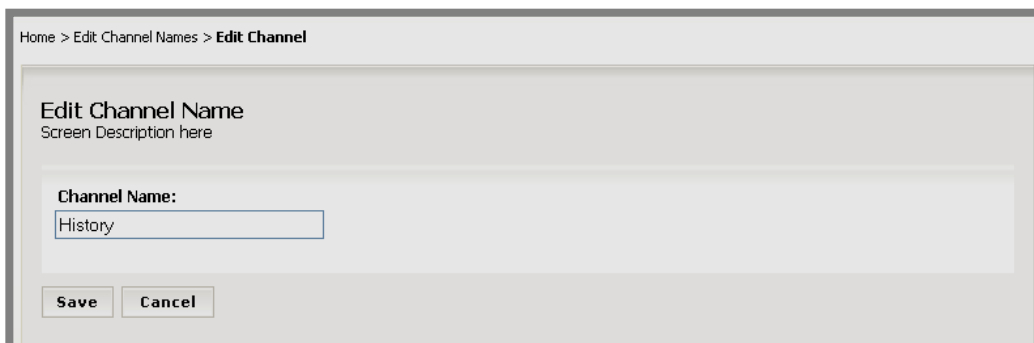

Home > Edit Channel Names > **Edit Channel**

Edit Channel Name
Screen Description here

Channel Name:
History

Save   Cancel

Exhibit 5-101: Edit Channel Name

5. Make the desired change to the *channel* name.

6. Click on the *Save* button. The *Edit Channel Names* window will return as the active window. The new *channel* name will display. If this *channel* was assigned, the name will change on the End User in a text-based template.

Assigning Channels

Site Directors can assign *channels* for the main *site* and any *subsite*. Subsite Directors can assign *channels* for their *subsites*. As long as the Site Director has created the *channel* name, that *channel* can be assigned anywhere.

To assign *channels*:

1. Access the *Site* or *Subsite Workspace*.

2. Click on the *Channels* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on *Assign Channels* from either the Configure drop-down menu or the Configure tab. An *Assign Channels* window (i.e., *channel* library) like the one shown in Exhibit 5-102 will display. As you can see, this window contains a list of all available *channels*.

4. Click in the checkbox to the left of the *channels* you wish to use. If you are on the main *site*, you are assigning *channels* for that *site*. If you are on a *subsite*, you are assigning channels for that *subsite*.
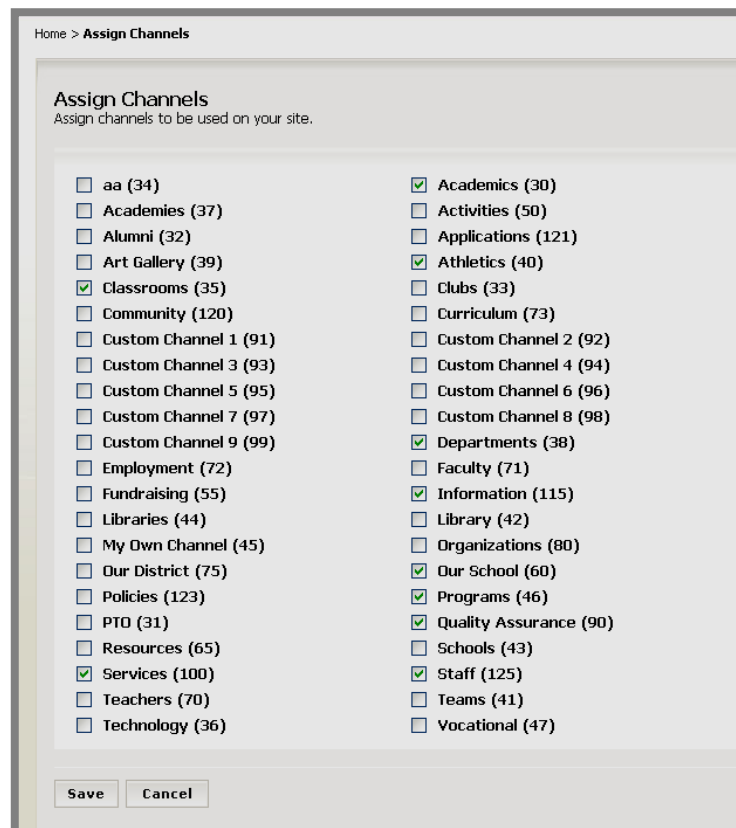

Exhibit 5-102: Assign Channels window

5. Click on the *Save* button once you have selected your *channels*. They will immediately appear in the *Content Browser*. If you check the End User, however, you will not see the *channels* you assigned to your website. *You must have a least one section in a channel before it will display on the channel bar*.

   TIP: You must have a least one channel assigned for your website to display properly.

Sorting Channels

Site Directors can control the order of the *channels* on the *Channel* bar of the *main site* or any *subsite*. Subsite Directors can control the order of the *channels* on their *subsites*. You sort *channels* manually the same way you sort *subsites*. However, as you can see from Exhibit 5-103, you may sort *channels* alphabetically.

To sort *channels*:

1. Access the *Site* or *Subsite Workspace*.

2. Click on the *Channels* task from either the *Configure* drop-down menu or the *Configure* tab.

3. Click on *Sort Channels* from either the Configure drop-down menu or the Configure tab. A *Sort Channels* window like the one shown in Exhibit 5-103 will display.
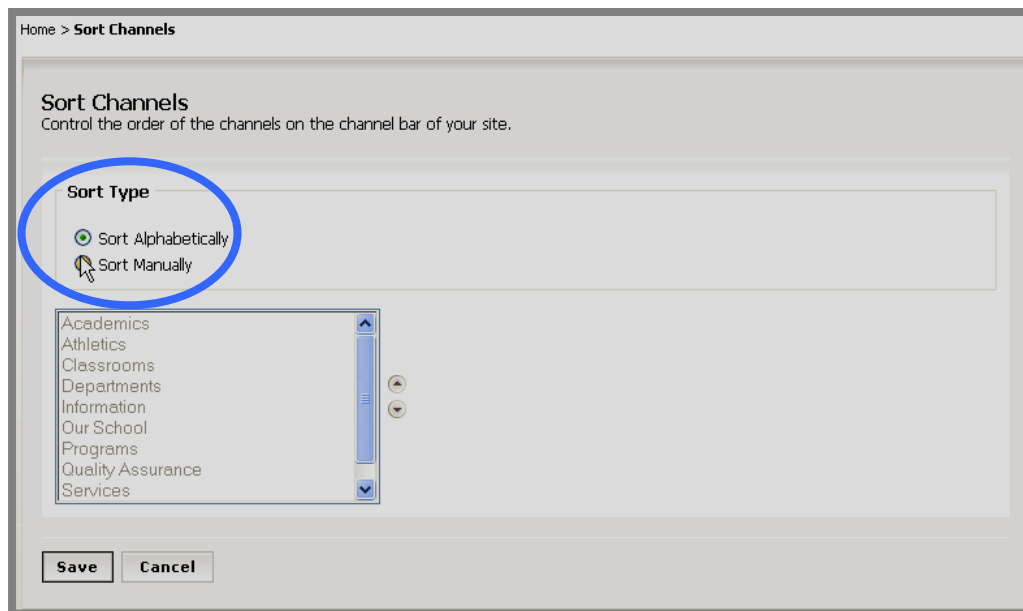

Exhibit 5-103: Sort Channels window

4. To sort the *channels* alphabetically:

   a. Click in the radio button to the left of "Sort Alphabetically".

    b. Click on the *Save* button. The *channels* will display alphabetically in the *Sort Channels* window, the *Content Browser* and on the End User.

5. To sort the *channels* manually, click on the radio button to the left of "Sort Manually".

    a. Highlight a *channel*.

    b. Use the up and down arrows until the *channels* are in the desired order.

    c. Click on the *Save* button. The *channels* will display in the desired order in the *Sort Channels* window, the *Content Browser* and on the End User.

Section Configurations Task

The **Schoolwires** Section Management suite contains three tools. They appear in your workspace as tasks. The three tasks are:

- *Page Layouts* (available in *Site* and *Subsite Workspaces*)

- *Section Configurations* (available in *Site Workspace* only)

- Section Robot (available in Site Workspace only)

Section Configurations allows Site Directors to create *section* configurations. They can create as many *section* configurations as they desire. In each configuration they will:

- Set and store the *section* options for the *sections* that will use the configuration.

- Choose the types and numbers of *pages* that will be in the configuration.

- Choose the *page* layouts for the *section* homepage and each *Flex Page* they will add to that *section* configuration.

See Chapter 15: "Section Management" for more information on *page* layouts and their relationship to *Section Configurations* and *Section Robot*.