USER GUIDE

Chapter 6
Site Manager—Channel Workspace

Schoolwires Academic Portal
Version 4.3

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Introduction

T he main *site* and each *subsite* of your website contain *channels* or groups of information. These *channels* are visible on every *page* of your *site* or *subsite* provided they each contain at least one *section* and you are using a standard **Schoolwires**® template or you have created this same structure in a custom template.

Channels provide users with consistent navigation. The *channels* on each *subsite* may be different from those of the main *site* or any other *subsite*.

Channel Workspace Tasks and Functions

Site Directors and Subsite Directors use the *Channel Workspace* of **Site Manager** to:

- Access *section* workspaces.
- Add *sections* to a *channel*.
- Sort the *sections* in a *channel*.
- Modify options for *sections* within a *channel*.
- Move *sections* to different *channels* on the *site* or *subsite*.
- Move *sections* to different *channels* on another *site* or *subsite* (Site Directors' only).
- Delete *sections*.

See **Academic Portal** Chapter 5: "**Site Manager**—Site Workspace" for more information on how Site Directors and Subsite Directors assign *channels*, edit *channel* names and sort *channels*.

Accessing the Channel Workspace

To access the *Channel Workspace*:

1. Access the *Site* or *Subsite Workspace*. Notice all the *channels* on the *site* or *subsite* display in the *Content Browser*.

2. Click on the *channel* you wish to access. A *Channel Workspace* like the one shown in Figure 6-1 will display.
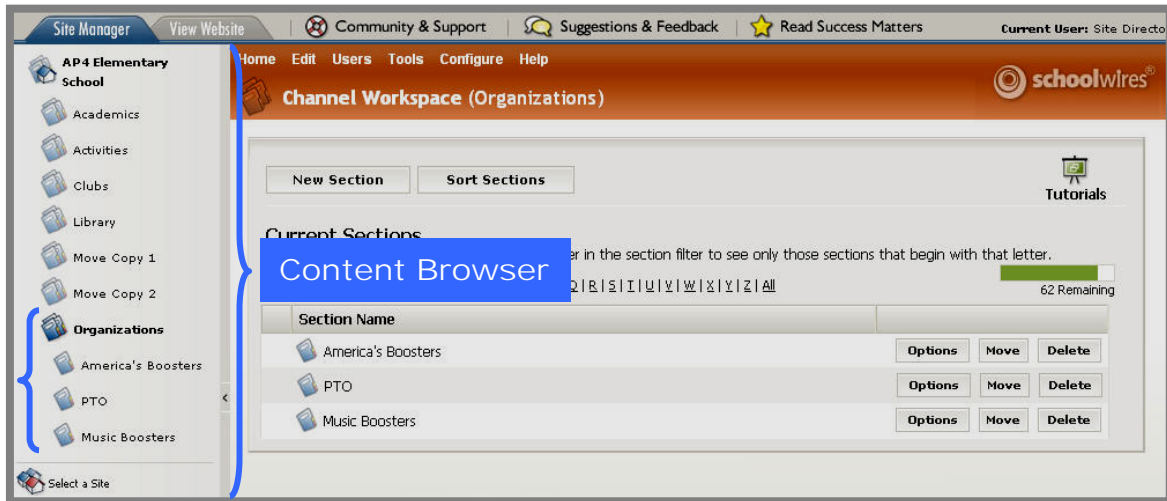
Figure 6-1: Channel Workspace

TIP: If you need to access the Channel Workspace for a different channel, click on that channel in the Content Browser. The Channel Workspace for that channel will display.

Overview of the Channel Workspace

The *Channel Workspace* is color-coded red. This provides you with a positive indication that you are in a *Channel Workspace*. The name of the *channel* in which you are working displays at the top of the workspace.

The *Content Browser* is collapsible. This enables you to enlarge the workspace. You collaspse and expand it by clicking on the arrow ⟨ between the *Content Browser* and the *Channel Workspace*.
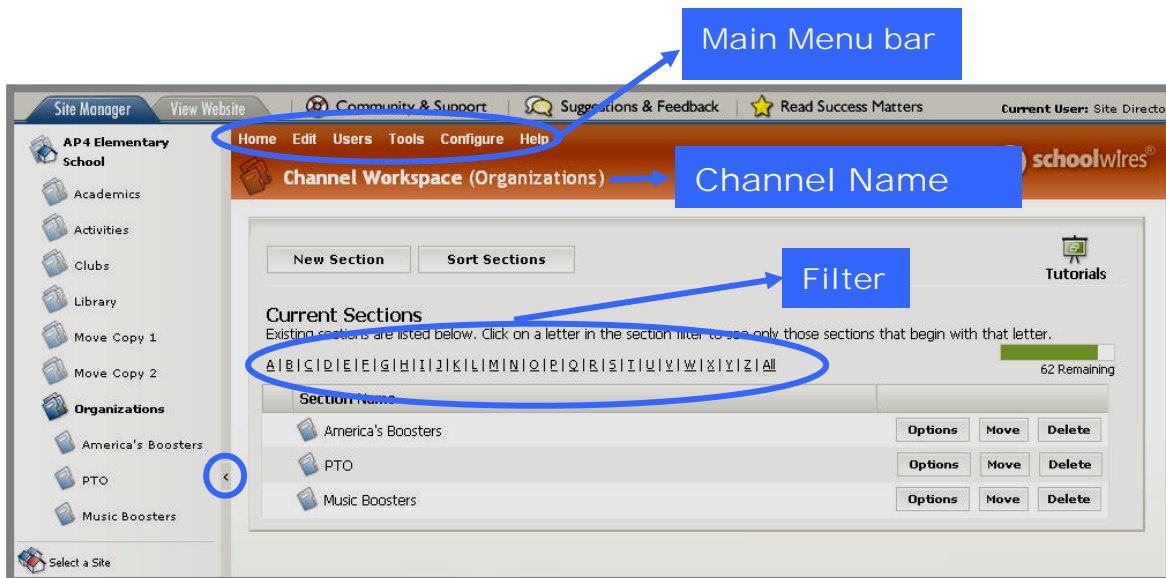

Figure 6-2: Channel Workspace

Main Menu Bar

The Main Menu bar for the *site* or the *subsite* appears above the name of the *channel*. You can use the Main Menu bar to access tasks in the *Site* or *Subsite Workspace*. Clicking on Home <u>on the Main Menu bar</u> will take you to the *Site* or *Subsite Workspace*.

However, once you have navigated away from the *Channel Workspace*, clicking on Home <u>in the breadcrumbs</u> will take you back to the *Channel Workspace*.

Section Filter

Notice that you can filter the *sections* in a *channe*l using the alphabetic filter just above the list of the current *sections*.

- To apply the filter, click on a letter. Only those *sections* with a name that begins with that letter will display in the workspace.
- To display all the *sections* in the *channel*, click on All. All the *sections* in the *channel* will display in the workspace.

Accessing Section Workspaces

In addition to the workspace tasks, Site Directors and Subsite Directors may access *section* workspaces from within a *Channel Workspace*. To do this, they can click on the *section* name in either the *Channel Workspace* or the *Content Browser*. The *Section Workspace* for that *section* will display.

Workspace Tasks

Site Directors and Subsite Directors will use the *Channel Workspace* of **Site Manager** to perform five tasks. These are accessed through the buttons within the *Channel Workspace*. These buttons are:

- *New Section*: Enables you to add a *section* to the *channel*.

- *Sort Sections*: Enables you to change the order in which *sections* appear in the *channel* drop-down list on the end-user website as well as in the *Channel Workspace* and *Content Browser*.

  <u>Note</u>: If there are 15 or more *sections* in a *channel*, they will display on a directory page. The *sections* on a directory page always display alphabetically. Therefore, you will not be able to sort the *sections* if there are 15 or more *sections*.

- *Options*: Enables you to modify options for a *section* within the *channel*.

- *Move*: Enables Site Directors and Subsite Directors to move a *section* to another *channel* on the same *site* or a *subsite*. Enables Site Directors to move a *section* to another *channel* on another *site* or a *subsite*.

- *Delete*: Deletes a *section*.

Each of these tasks is discussed in this chapter.

Adding a New Section within the Channel Workspace

Section Limits

The **Academic Portal** will compare the total number of *sections* currently in your *site* and all your *subsites* to your organization's section limit. As you can see from Figure 6-3, a green progress bar with the number of *sections* remaining appears in the *Channel Workspace.* It will also appear in the *Section Robot* where Site Directors can also add *sections*.

Note: Please consult *Schoolwires* Standard Terms and Conditions and your Services Agreement with *Schoolwires* for the maximum number of *sections* your organization is allowed.

Figure 6-3: Channel Workspace showing progress bar

As shown in Figure 6-4, as your organization approaches the maximum number of *sections* allowed, you will see the green progress bar as well as a warning message.
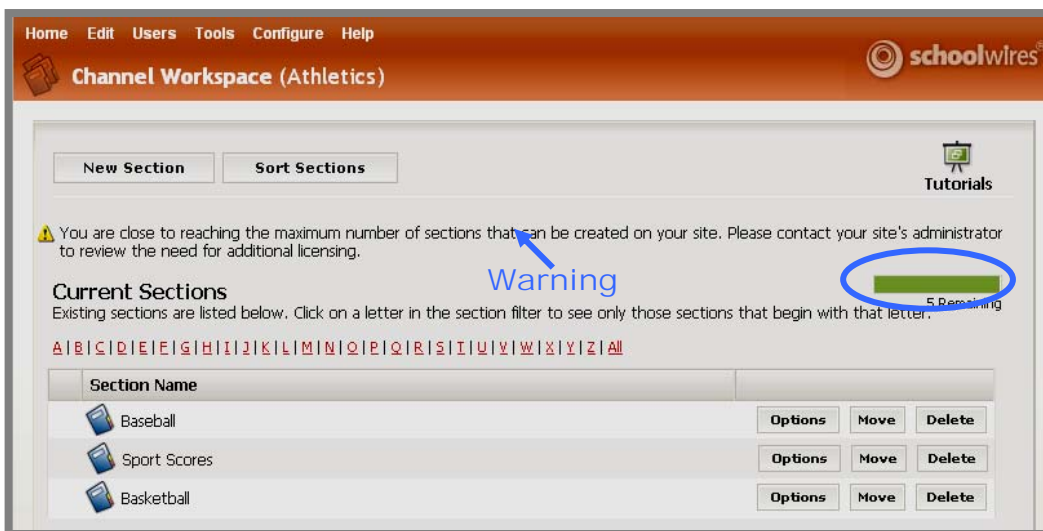

Figure 6-4: Channel Workspace as approach section limits

If you have reached the maximum number of *sections*, you will also see the green progress bar and a warning. However, as you can see from Figure 6-5, you will be unable to add a new *section*. That task (button) will no longer be available within the *Channel Workspace*.
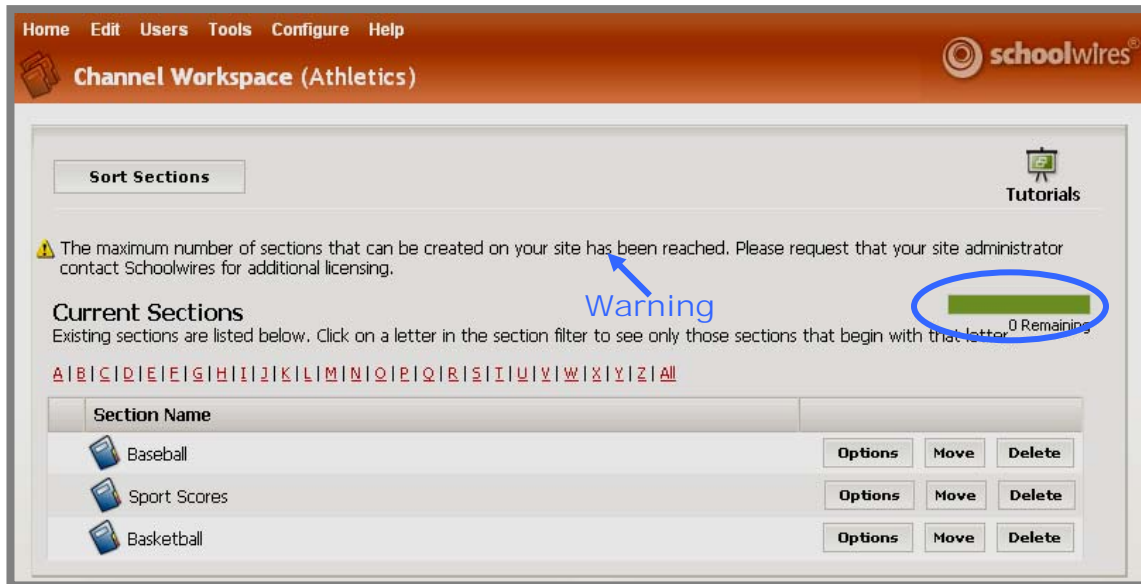

Figure 6-5: Channel Workspace: Section Limits Reached

Adding a New Section

To add a new *section* to a *channel*:

1. Access the *Channel Workspace* for the *channel* to which you want to add the *section*.

2. Click on the *New Section* button on the top left of the workspace. A *New Section* window like the one shown in Figure 6-6 will display.

    Note: The option to go to *Section* Configurations to create or edit configurations will only display in the *New Section* window on the main *site*.
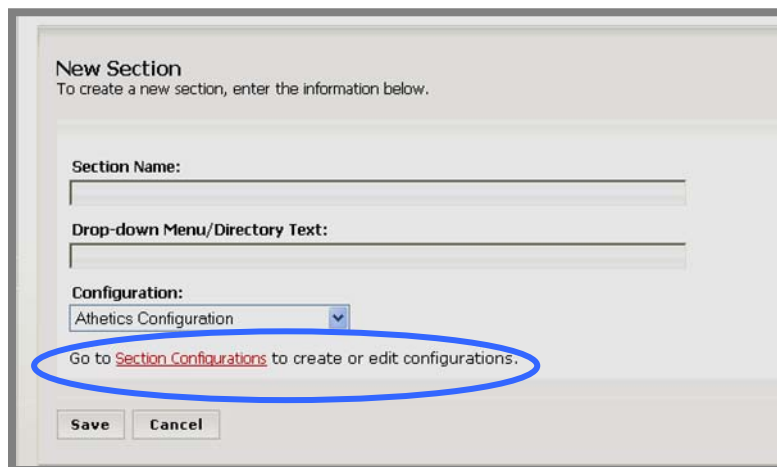

Figure 6-6: New Section window

3. Enter the name for the *section* as you want it to appear within the *section* itself in the Section Name field.

    ⚠ **Warning**: If you use double quotes in the name of the *section*, **Site Manager** will be inaccessible to all users, including the Site Director. If quotes are needed, use single quotes instead. An example of using single quotes in a *section* name would be *Theatre Production of 'Annie.'*

4. Enter the name for the *section* as you want it to appear in the *channel* drop-down menu or directory page in the Drop-down Menu/Directory Text field.

    TIP: Usually the Menu Name and the Section Name are the same. However, when creating teacher sections, it is important to have the **Menu Name be last-name-first (e.g., Smith, Jane)**. Once the 15th teacher section is added, a directory page will display for the channel menu and the sections will be listed alphabetically, by the teachers' last names. It still makes sense to have a "friendly" **Section Name** (e.g., Mrs. Smith) that will appear at the top of the section.

5. Select the *section* configuration you want to use for the *section* from the drop-down list.

    Note: The *section* options are determined by the *section* configuration. A *section* configuration can also contain *page* layouts for some of the default *pages* in the configuration. As you can see from Figure 6-6, there is a link to the *Section Configurations* task at the bottom of the *New Section* window at the main *site*. See **Academic Portal** Chapter 15: "Section Management" for more information on how *page* layouts and *section* configurations are created.

6. Click on the *Save* button. A message will display as the *section* is being created. The *section* you added will appear in the *Channel Workspace*, the *Content Browser* and on the end-user website.

Sorting Sections

Sorting *sections* within a *channel* changes the order in which they appear in the *channel* drop-down list on the end-user website as well as in the *Channel Workspace* and the *Content Browser*.

To sort *sections* within a *channel*:

1. Access the *Channel Workspace* for the *channel* containing the *sections* you want to sort.

2. Click on the *Sort Sections* button on the top of the *Channel Workspace*. A *Sort Sections* window like the one shown in Figure 6-7 will display.

Figure 6-7: Sort Sections window

    a. Hover over the *section* you want to move. A four-way arrow ⊕ will display.

    b. Click on the *section* and drag it to the desired position.

    c. Release the button on the mouse.

    d. Repeat Step (a) to Step (c) as required until the *sections* are in the desired order.

3. Click on the *Save* button. The *Channel Workspace* will return as the active window. The *sections* will be listed in the new order in the *Channel Workspace*, the *Content Browser* and on the *channel* drop-down list on the end-user website.

    <u>Note</u>: If you attempt to sort *sections* that are being displayed on a directory page, you will see the message shown in Figure 6-8.
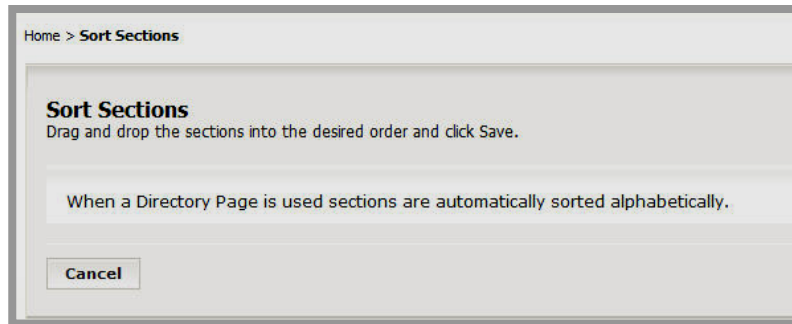
Figure 6-8: Directory page sort message

Editing Section Options

You can edit the options for a specific *section* within the *Channel Workspace*, regardless of how the *section* was created.

To edit the options for a *section*:

1. Access the *Channel Workspace* for the *channel* in which the *section* is located.

2. Click on the *Options* button to the right of the *section* you wish to edit. An *Edit Options* window like the one shown in Figure 6-9 will display. The options are distributed across the following five tabs:

   - *General* tab

   - *Navigation* tab

   - *Tools* tab

   - *Roles* tab

   - *Advanced* tab

Figure 6-9: Edit Options window: General tab

3. On the *General* tab (Figure 6-9), you can edit:

a. <u>*Section* Name</u>: Allows you to change the name of the *section* as it appears within the *section* itself in the Section Name field.

b. <u>Menu Name</u>: Allows you to change the name of the *section* that appears in the drop-down list under the *channel* title or on a *channel* directory page by typing the new name in the Menu Name field.

TIP: Usually the Menu Name and the Section Name are the same. However, when creating teacher sections, it is important to have the **Menu Name be last-name-first (e.g., Smith, Jane)**. Once the 15th teacher section is added, a directory page will display for the channel menu and the sections will be listed alphabetically, by the teachers' last names. It still makes sense to have a "friendly" **Section Name** (e.g., Mrs. Smith) for the top of the section.

c. <u>Display Last Modified Date</u>: Allows you to display the last modified date on every *page* of the *section* except the *Overview Page* by clicking in the On radio button.

d. <u>Hide *Section*</u>: Allows you to hide an individual *section* on the end-user website by clicking in the Yes radio button. The *section* will still be accessible in **Site Manager**.

<u>Notes</u>:

- The default setting for the Hide *Section* option is turned off. In other words, a *section* will show on the end-user website unless you choose to hide it or have role-protected it.

- The Map *Section* to URL option will disappear when a *section* is hidden. You cannot map to a hidden *section*.

TIP: You can link to a hidden section if you know the URL for that section.

e. <u>Map *Section* to URL</u>: Allows you to send *section* visitors to a website external to your organization's website or to a *page* within your organization's website.

<u>Note</u>: Once you map a *section* to a URL, you are still able to work within that *Section Workspace*. You can add *pages* and content to those *pages* but visitors to the end-user website will not see those *pages*. Remember that visitors will be redirected to the URL to which the *section* was mapped.
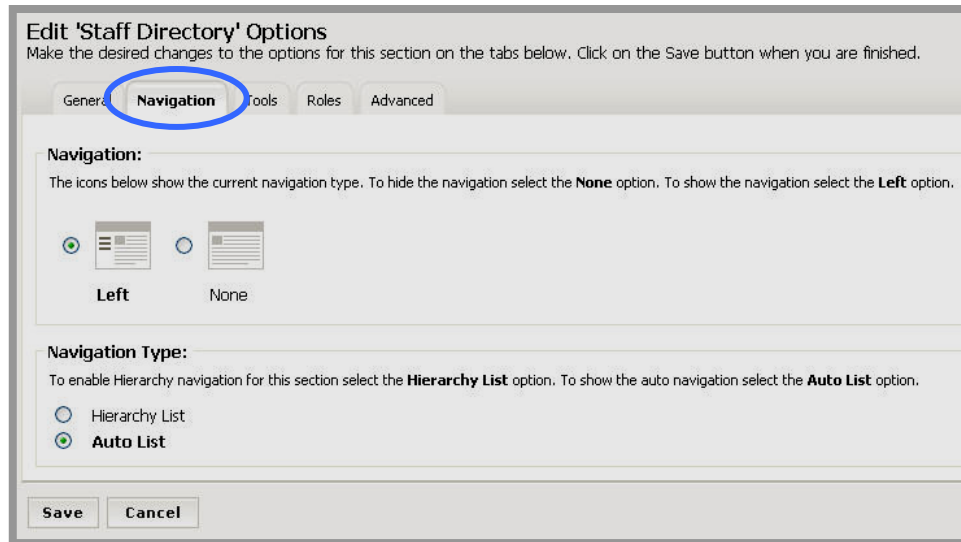
Figure 6-10: Edit Options window: Navigation tab

4. On the *Navigation* tab (Figure 6-10), you can edit:

    a. <u>Navigation</u>: Allows you to change whether left navigation is turned on for the *section* by clicking the appropriate radio button.

        i.   To show navigation, click in the Left radio button.

        ii. To hide the *section* navigation (i.e., *page* list), click in the None radio button.

        <u>Note</u>: Left navigation is commonly turned off for one of two reasons:

        •   The *section* contains only one *page* and you need more "real estate" for that page. However, you may also wish to turn the left navigation off simply because there is no need to list *pages* when there is only one *page* to display on that list.

        •   You wish to create your own navigation.

            TIP: We recommend that you have a qualified web developer create your navigation in this case.

    b. <u>Navigation Type</u>: Allows you to choose to have the *page* links for the *section* display individually or enable Hierarchy List for this *section*. Click in the radio button to the left of your choice. You have two options:

        i.   <u>Auto List</u>: *Page* links list individually.

        ii. <u>Hierarchy List</u>: *Page* links can be nested according to a hierarchy. For more information on the Site Hierarchy List navigation, see **Academic Portal** Chapter 9: "Edit Site and Section Hierarchy Navigation."

<p align="center">**Figure 6-11: Edit Options window: Tools tab**</p>

5. On the *Tools* tab (Figure 6-11), you can change the following settings:

    a. <u>Routing Profile</u>: If content routing has been enabled on your *site* or *subsite*, you can apply a custom routing profile to each *section*. See **Academic Portal** Chapter 14: "Using Content Routing" for more information.

    b. <u>Allow Forms & Surveys Editing</u>: If your organization has purchased the **Forms & Surveys** Premium Enhancement Module, you can allow Section Editors to create and manage their own

forms and surveys by clicking in the On radio button. See **Academic Portal** Chapter 12: "Managing **Forms and Surveys**" for more information.

c. Allow MiniBase Editing: If your organization has purchased the **MiniBase** Premium Enhancement Module, you can allow Section Editors to create and manage their own directory lists by clicking in the On radio button. See **Academic Portal** Chapter 17: "Using **MiniBase** for more information.

d. Allow Blog Editing: If your organization has purchased the **Blogs** Premium Enhancement Module, you can allow Section Editors to create and manage their own blogs by clicking in the On radio button. See **Academic Portal** Chapter 19: "Using **Blogs**" for more information.

e. Allow Podcast Editing: If your organization has purchased the **Podcast** Premium Enhancement Module, you can allow Section Editors to create and manage their own podcasts by clicking in the On radio button. See **Academic Portal** Chapter 20: "Using **Podcasts**" for more information.

f. Allow Photo Gallery Editing: If your organization has purchased the **Photo Gallery** Premium Enhancement Module, you can allow Section Editors to create and manage their own photo galleries by clicking in the On radio button. See **Academic Portal** Chapter 18: "Using **Photo Gallery**" for more information.
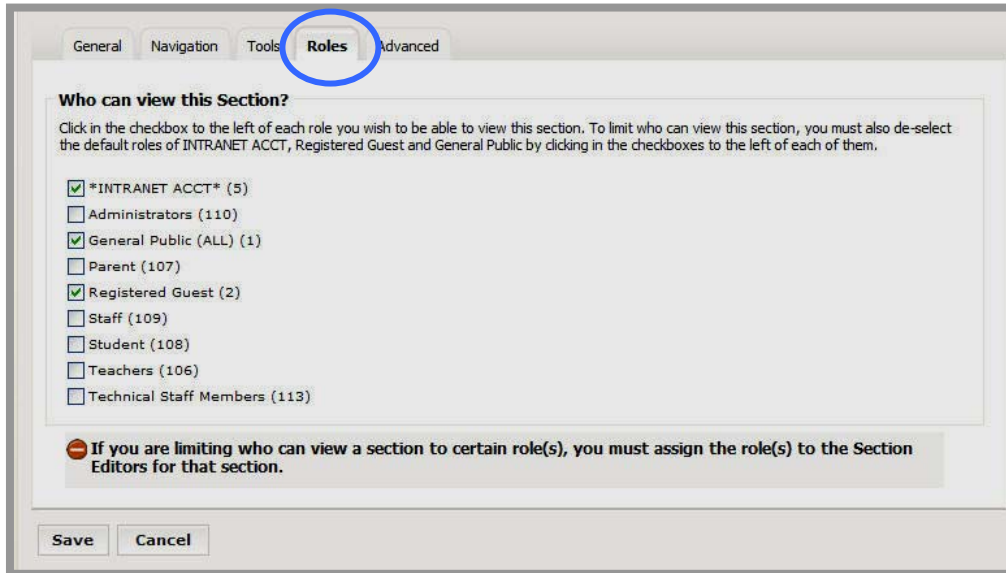
Figure 6-12: Edit Options window: Roles tab

6. On the *Roles* tab (Figure 6-12), you can make a *section* visible to registered users with specific roles by clicking in the checkbox to the left of each role you want to be able to view the *section* and deselecting all other roles. In essence, you can hide a *section* from those who are not assigned a specific role.
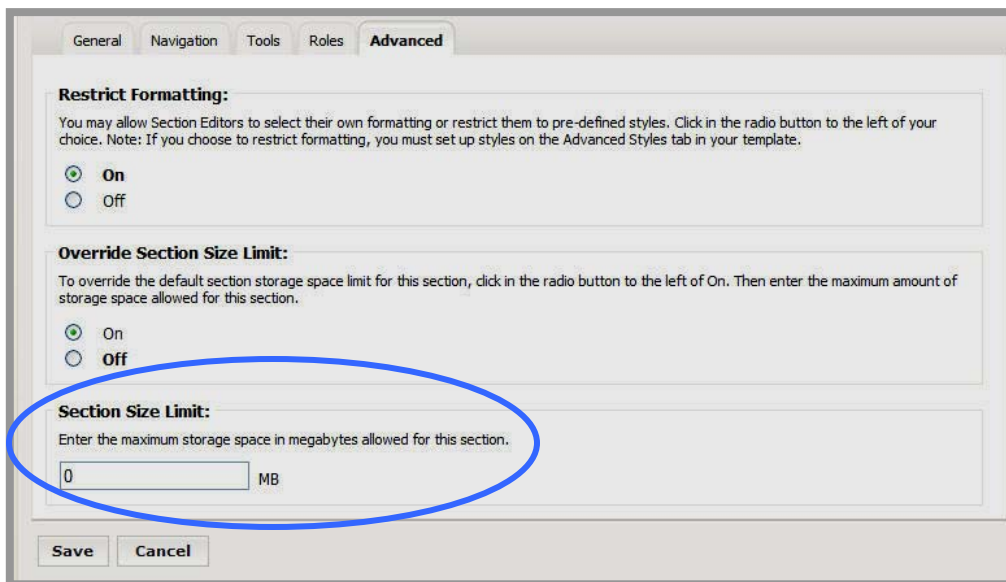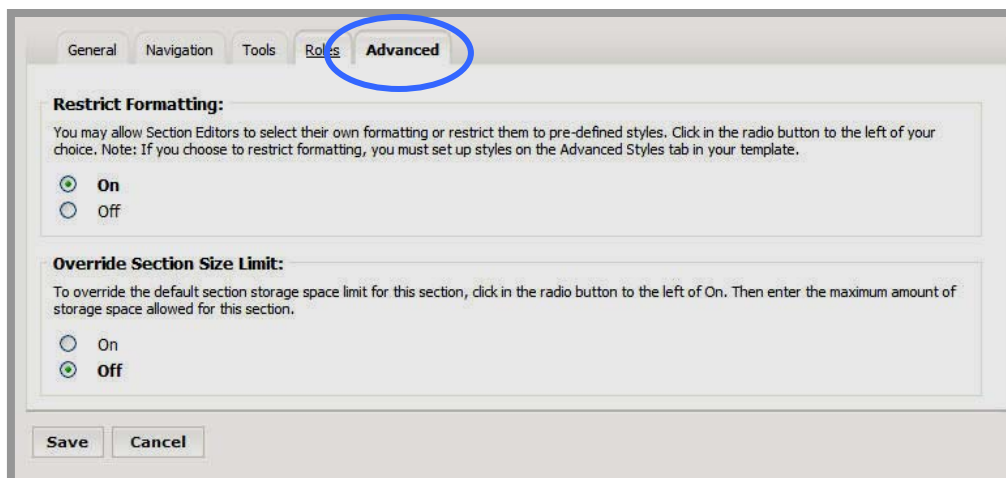

Figure 6-13: Edit Options window: Advanced tab

7. On the *Advanced* tab (Figure 6-13), you can:

    a. Restrict formatting. This option allows you to maintain control of the formatting for the *section* (restrict formatting) by clicking in the On radio button. You can allow Section Editors to apply formatting (e.g., fonts) to their *sections* by clicking in the Off radio button.

Note: If you restrict formatting, you should enter styles in the Editor Styles of your template. This will allow editors to select styles when they are working in the **Schoolwires Editor**. See **Academic Portal** Chapter 11, "Using **Schoolwires Styler**™" for more information. If you do not enter styles, editors will be limited to the default styles supplied with the template.

b. Override the size limit for the *section*. You can allow a section size that is different from the default section size by clicking in the On radio button. When you do this, a Section Size Limit field like the one shown in Figure 6-14 will display. Enter the number of megabytes to allow this *section* in the field.

Figure 6-14: Section Size Limit field

8. Click on the *Save* button. The *Channel Workspace* will return as the active window.

Moving a Section

Site Directors may move a *section* to a different *channel* on the same *site* or on a different *site* or *subsite*. Subsite Directors may move a *section* to a different *channel* on the same *subsite*.

Moving a Section to a Channel on the Same Site

To move a *section* to a *channel* on the same *site*:

1. Access the *Channel Workspace* for the *channel* in which the *section* is currently located.

2. Click on the *Move* button to the right of the *section* you wish to move. A *Move Section* window like the one shown in Figure 6-15 will display.

Figure 6-15: Move Section window

3. Do not do anything with the *Site or Subsite* drop-down list. Leave the current *site* or *subsite* selected.

   Note: A Subsite Director will only have access to the current *subsite* from this drop-down list.

4. Choose the *channel* to which you wish to move the *section* from the *Channel* drop-down list.

5. Click on the *Move* button. The *Channel Workspace* will return as the active window. The *section* you moved will no longer display in that workspace. It will display in the destination *channel* in the *Content Browser*, in the *Channel Workspace* and on the end-user website.

Moving a Section to a Channel on a Different Site (Site Directors Only)

To move a *section* to a *channel* on a different *site*:

1. Access the *Channel Workspace* for the *channel* in which the *section* is currently located.

2. Click on the *Move* button to the right of the *section* you wish to move. A *Move Section* window like the one shown in Figure 6-15 will display.
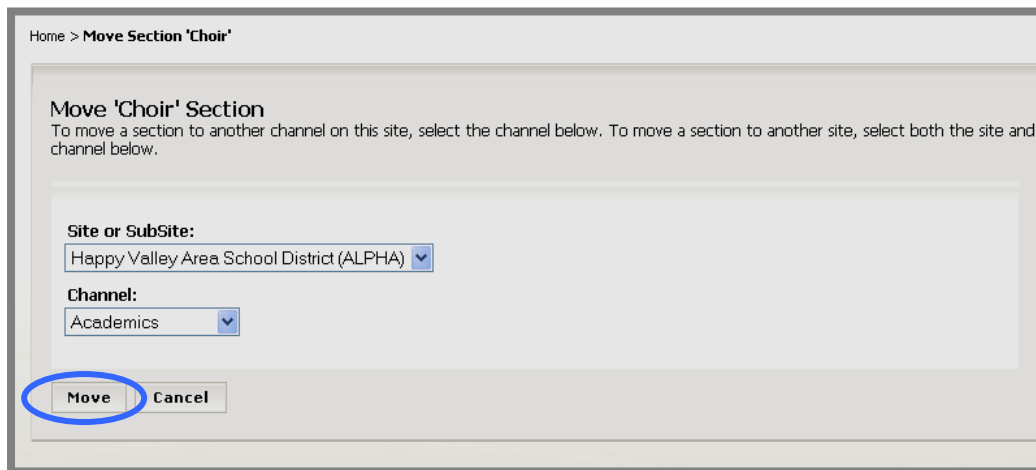
3. Choose the *site* or *subsite* to which you want to move the *section* from the *Site* or *Subsite* drop-down list.

4. Choose the *channel* to which you wish to move the *section* from the *Channel* drop-down list.

5. Click on the *Move* button. The *Channel Workspace* will return as the active window. The *section* you moved will no longer display in that workspace. It will display in the destination *channel* in the *Content Browser*, in the *Channel Workspace* and on the end-user website.

Deleting a Section

TIP: Before you delete a section, be certain you are working in the correct Channel Workspace.

To delete a *section* from a *channel*:

1. Access the *Channel Workspace* for the *channel* in which the *section* is currently located.

2. Click on the *Delete* button to the right of the *section* you wish to delete. A confirmation message like the one shown in Figure 6-16 will display.

Figure 6-16: Delete section confirmation message

3. Click on the *OK* button. The *Channel Workspace* will return as the active window. The *section* you deleted will not display in that *channel* in the *Content Browser,* in the *Channel Workspace* or on the end-user website.