



## **USER GUIDE**

### **MiniBase**

**Schoolwires® Centricity™**

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## Introduction

With the **MiniBase** (*Directories & Lists*) Premium Enhancement Module, you can create, manage and deploy searchable lists, or “mini-databases” for use by visitors to your website.

### Audience and Objectives

We recommend that Site Directors, Subsite Directors and Section Editors read this chapter.

In this chapter, you will learn how to:

- Create and edit a **MiniBase** list.
- Add records to a list.
- Add a list to your website.
- Manipulate records.
- Import and export **MiniBase** configurations.
- Deploy a **MiniBase** list.

## Overview

**MiniBase** allows you to easily create and manage "mini-databases" you use to create lists of information. Once a MiniBase had been created and populated with information, it can be added to your website and viewed by your visitors. Depending on the filters that you have set, your visitors will be able to search the list using those filter and limit what information is returned.

You might use **MiniBase** to create searchable lists such as:

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

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

Teachers  
This directory provides information for contacting all the teachers in the Indigo District.

Last Name

School Name

Subject

Figure 1: Searchable Teacher Directory on end user website

Teachers  
This directory provides contact information for all teachers in the Indigo District.

First Name	Last Name	School Name	Subject	School Phone Number	Email Address	Home Phone Number
Lyle	Kodak	Indigo HS	English	777-999-1001	<a href="mailto:lkodak@indigo.com">lkodak@indigo.com</a>	777-875-8945
Chris	Miller	Indigo HS	Shop	777-999-1001	<a href="mailto:cmiller@indigo.com">cmiller@indigo.com</a>	777-785-6769

Figure 2: Search results in table view

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

Figure 3: Search results in list view

## Accessing MiniBase

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

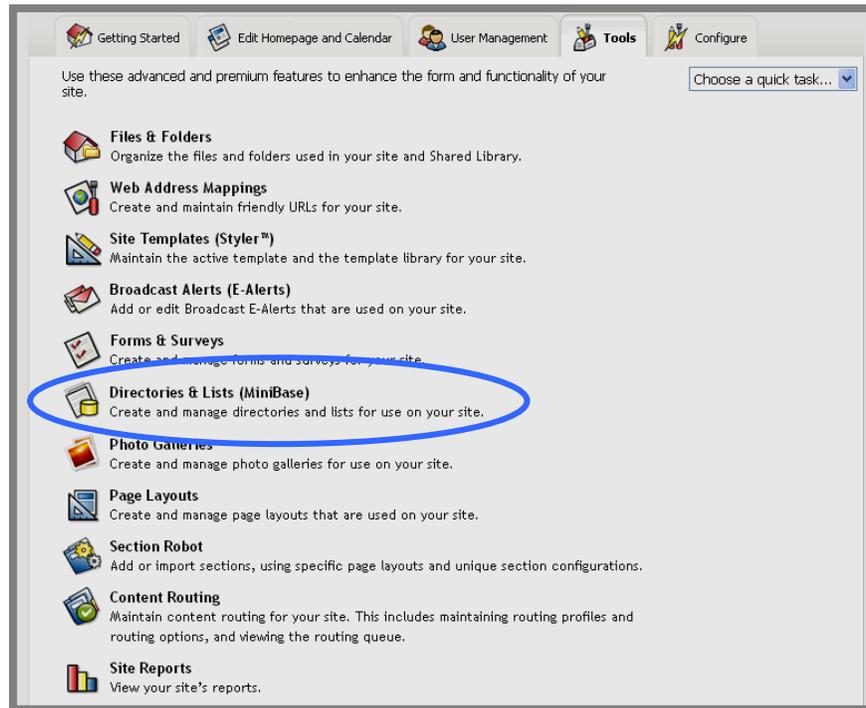


Figure 4: Tools tab with MiniBase in Site Workspace

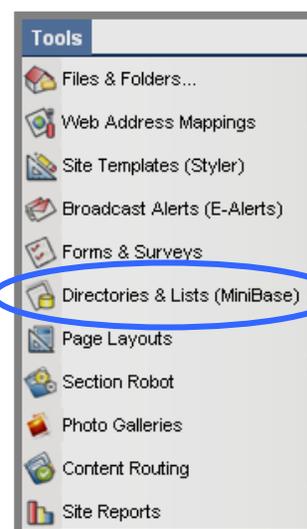


Figure 5: Tools drop-down menu with MiniBase in Site Workspace

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

## Creating a New List

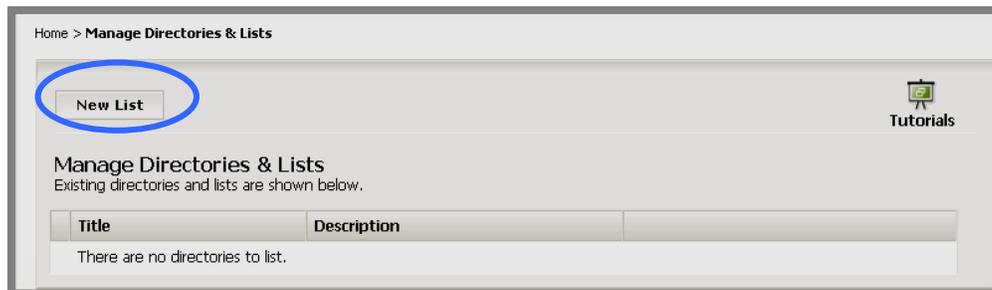
In order to create a new directory or list for use on your website, you must:

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

### Creating and Configuring the List

To add a new list:

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



**Figure 6: Manage Directories & Lists window**

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

Home > Manage Directories & Lists > **New List**

### New List

Enter list information below.

**General** Fields

All fields marked with an asterisk (\*) are required.

**Title: \***

**Description:**

**Display Format:**

**Table View**  **List View**

Last Name	First Name
Doe	John
Doe	Jane
Doe	Jack

Last Name: Doe
First Name: John
Building: High School
Last Name: Doe
First Name: Jane
Building: High School

Previews of two display formats for end user website

**Save** **Cancel**

**Figure 7: New List window on General tab**

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

Home > Manage Directories & Lists > New List

**New List**  
Enter list information below.

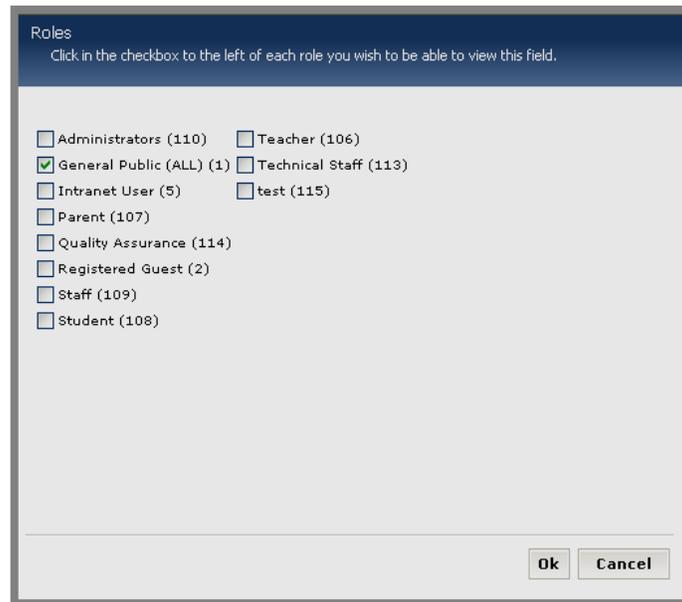
General **Fields**

Field Name	Display Roles	Filter Type	Sort Type	Sort Order
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾
	Edit Roles	None ▾	None ▾	None ▾

Save Cancel

**Figure 8: New List window on Fields tab**

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



**Figure 9: Roles window**

To limit who can view the information in a field:

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

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

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

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

## Adding Records to the List

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

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

### Adding Records One at a Time

To add records one at a time:

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

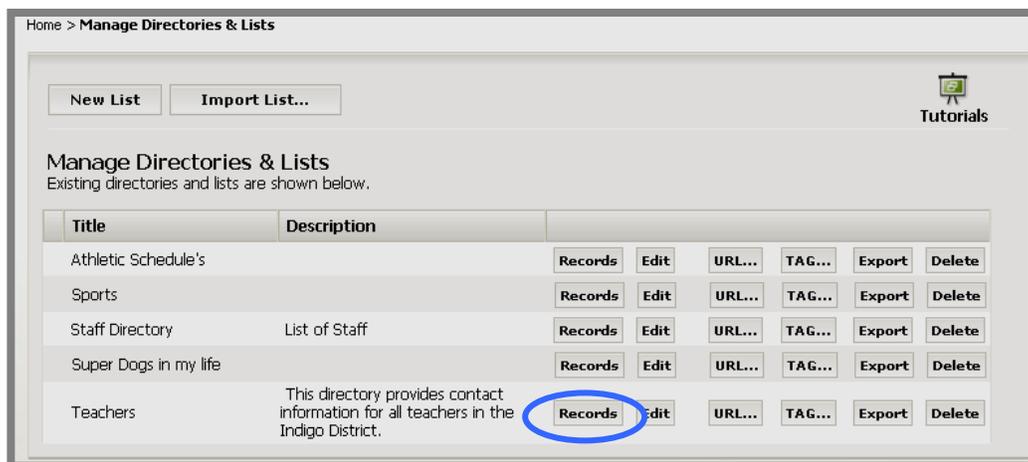


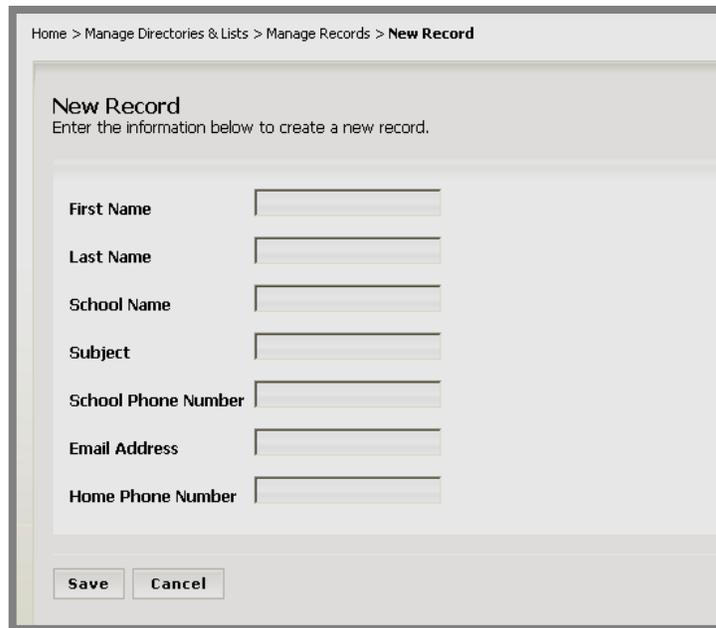
Figure 10: Manage Directories & Lists window

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



Figure 11: Manage Records window

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



Home > Manage Directories & Lists > Manage Records > **New Record**

**New Record**  
Enter the information below to create a new record.

First Name

Last Name

School Name

Subject

School Phone Number

Email Address

Home Phone Number

**Figure 12: New Record window**

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

### Importing Records

There are two steps to importing records:

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

#### Creating the CSV File

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

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.

Some important notes on the CSV file:

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

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

	A	B	C	D	E	F	G	H
1	FirstName	LastName	SchoolName	Subject	SchoolPhoneNu	EmailAddress	HomePhoneNumber	
2	Scott	Stevens	Indigo MS	Blue Team Science	777-999-1001	sstevens@indigo.com	777-865-4932	
3	Mary Beth	Rogers	Indigo District	Superintendent	777-999-1001	mrogers@indigo.com	777-858-6704	

**Figure 13: Sample CSV file**

#### Importing the Records

To import records after you have created the CSV file:

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

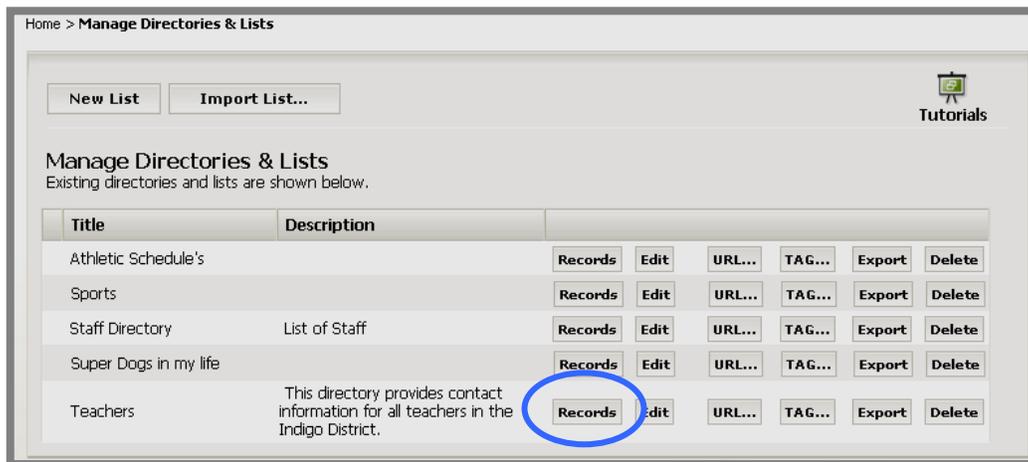


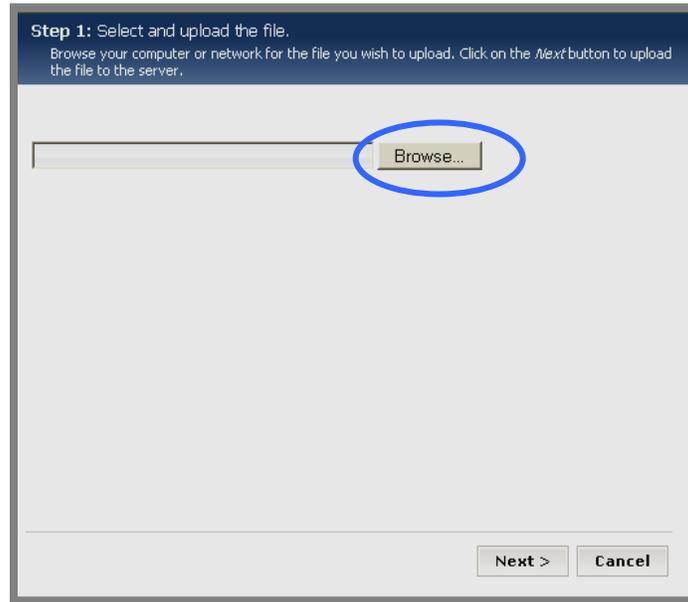
Figure 14: Manage Directories & Lists window

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



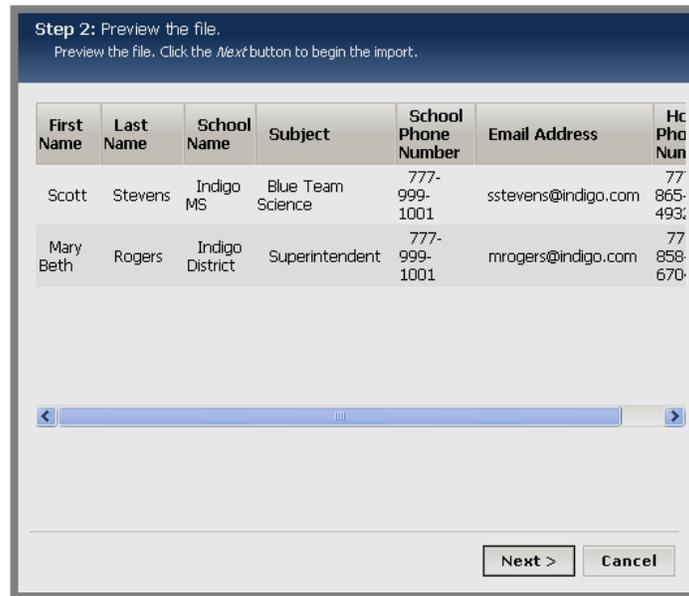
Figure 15: Manage Records window

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



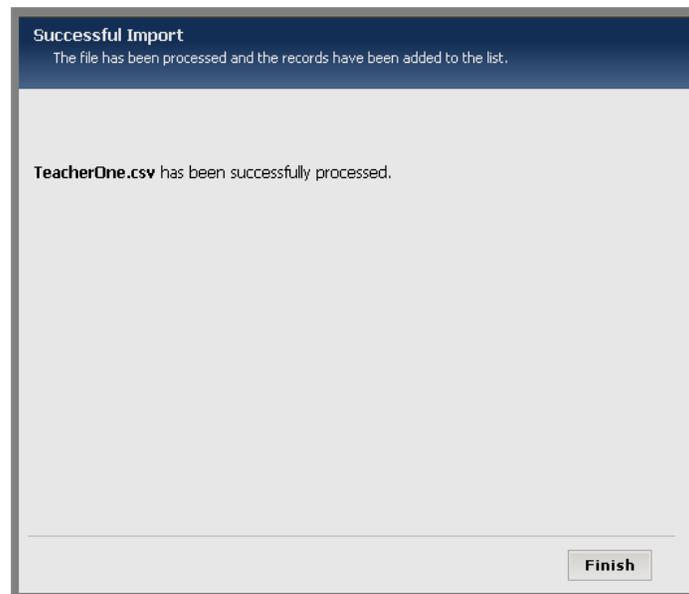
**Figure 16: Step 1 of the Import wizard**

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



**Figure 17: Step 2 of Import wizard (Preview the file)**

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



**Figure 18: Successful Import window**

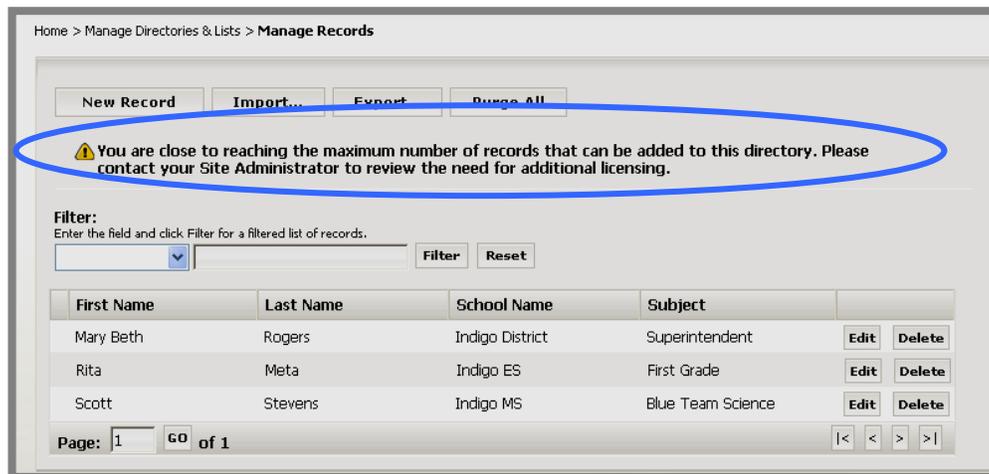
- Click on the *Finish* button. The *Manage Records* window will return as the active window. The records you imported will be in the MiniBase.

### Limit on Number of Records

Your organization will have an upper limit to the number of records it can store in each MiniBase. This is necessary in order to conserve storage space. This limit is entered by *Schoolwires*.

### Effects in Manage Records Window

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



**Figure 19: Message when approaching upper limit for records**

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

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



**Figure 20: Message when at upper limit for records**

### Effects on Importing Records

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

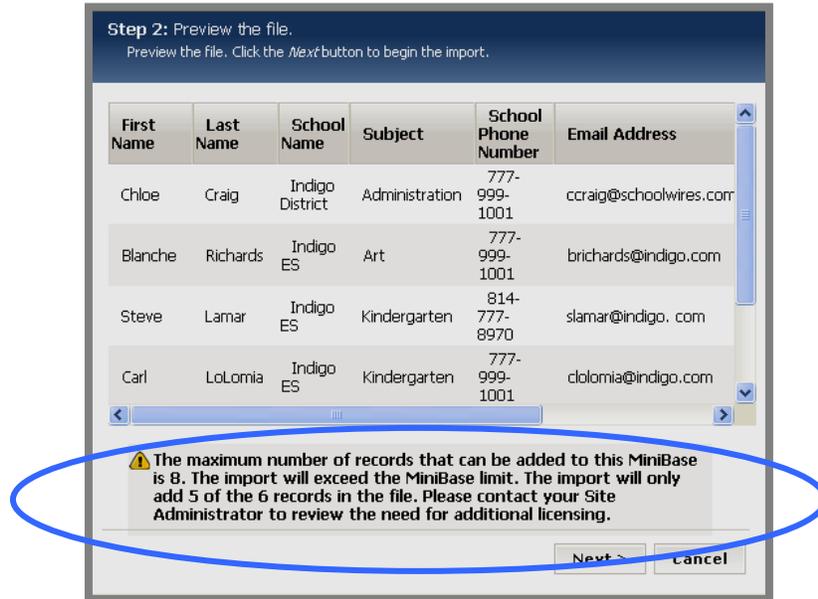


Figure 21: Message displays in file preview when import will exceed limit

## Deploying the List

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

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

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

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

### Using the Icon in the **Editor**

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

1. Click on the Page Name of the *Overview* or *Flex Page*. An **Editor** like the one shown in Figure 22 will display.

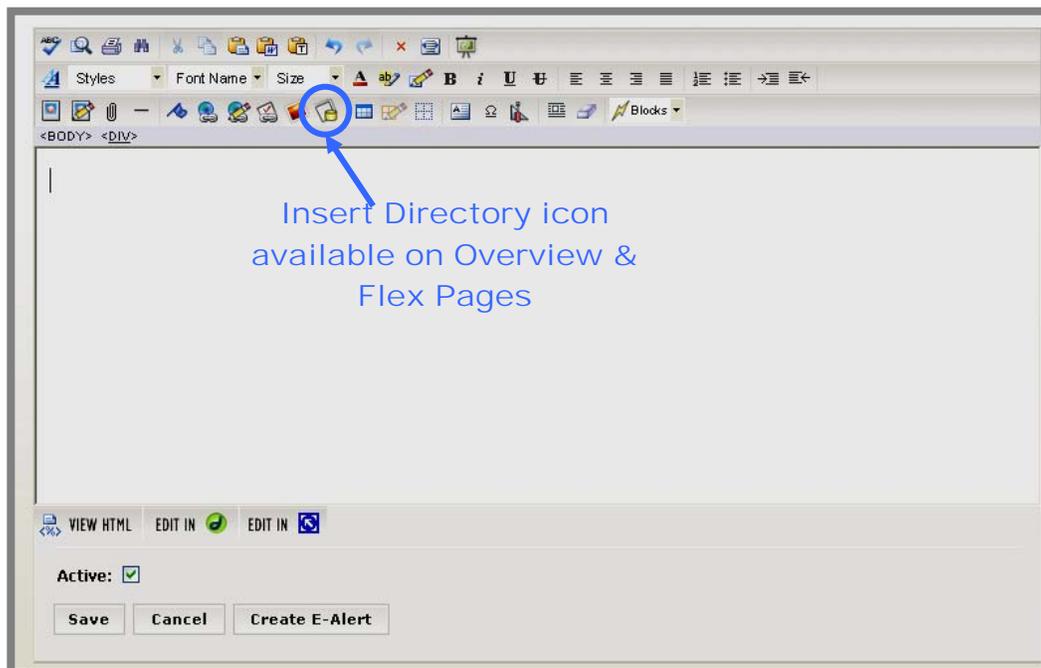
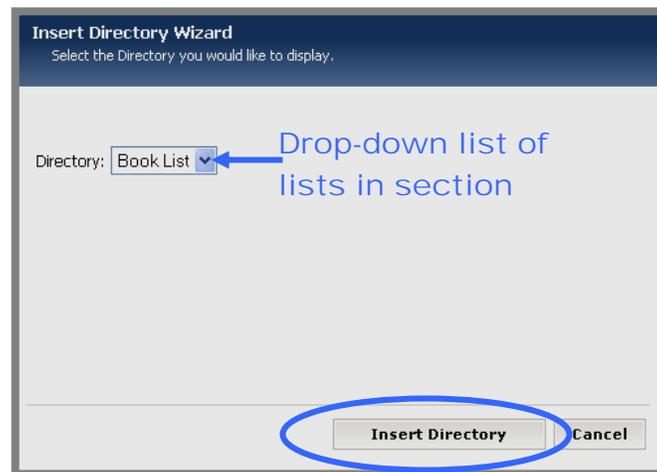


Figure 22: Editor

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



**Figure 23: Insert Directory wizard**

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

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

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

#### *Using the Tag to Deploy a Directory*

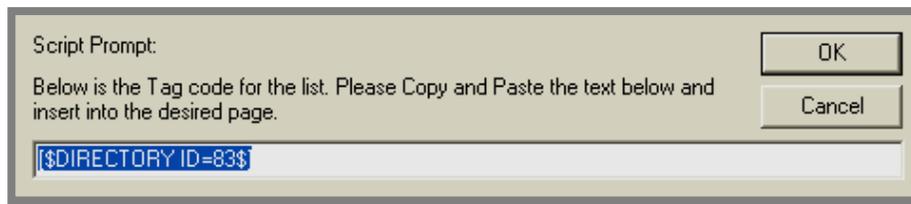
To deploy a directory using the Tag code:

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



**Figure 24: Manage Directories & Lists window**

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



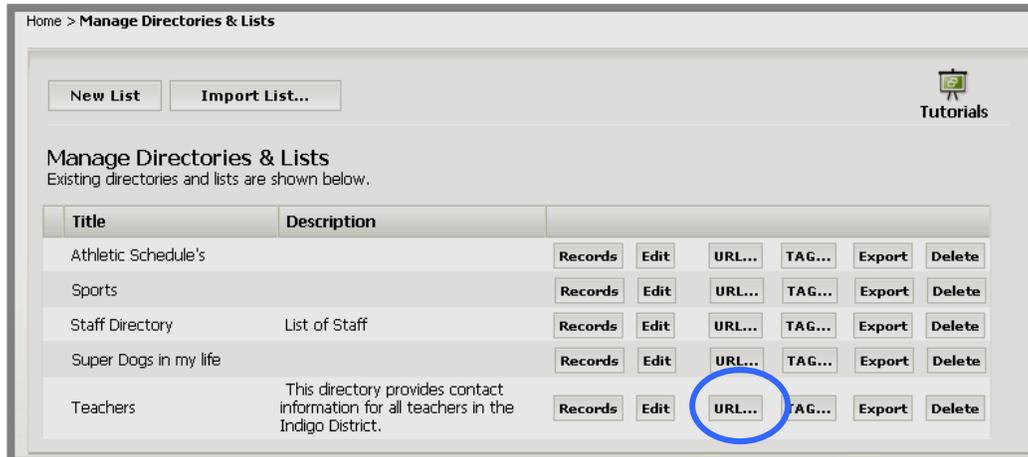
**Figure 25: Script Prompt window for Tag**

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

#### *Using the URL to Deploy a Directory*

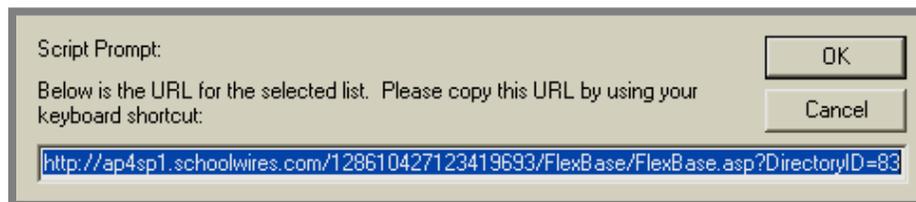
To deploy a directory using the URL:

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



**Figure 26: Manage Directories & Lists window**

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

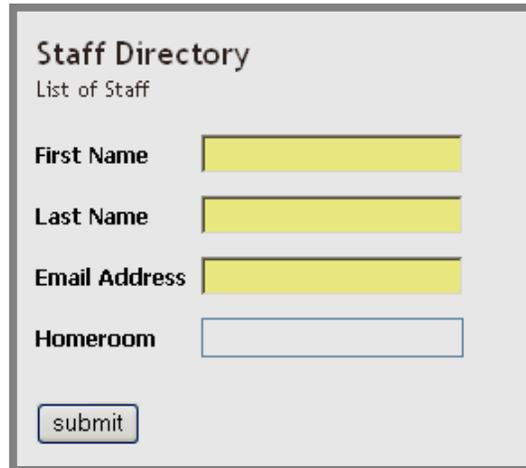


**Figure 27: Script Prompt window for URL**

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

### The Directory or List on the End User Website

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



The screenshot shows a search form titled "Staff Directory" with the subtitle "List of Staff". It contains four input fields: "First Name", "Last Name", "Email Address", and "Homeroom". The first three fields are highlighted in yellow. A "submit" button is located at the bottom left of the form.

Figure 28: Searchable list on end user website

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



The screenshot shows search results in a table view. The table has four columns: "First Name", "Last Name", "Email Address", and "Homeroom". There are two rows of data. A "Back" button is located at the bottom left of the table.

First Name	Last Name	Email Address	Homeroom
Dave	Long	<a href="mailto:dlong@schoolwires.com">dlong@schoolwires.com</a>	214
Eddie	Munster	<a href="mailto:munster@munster.com">munster@munster.com</a>	232

Figure 29: Search results displayed in table view



Figure 30: Search results displayed in list view

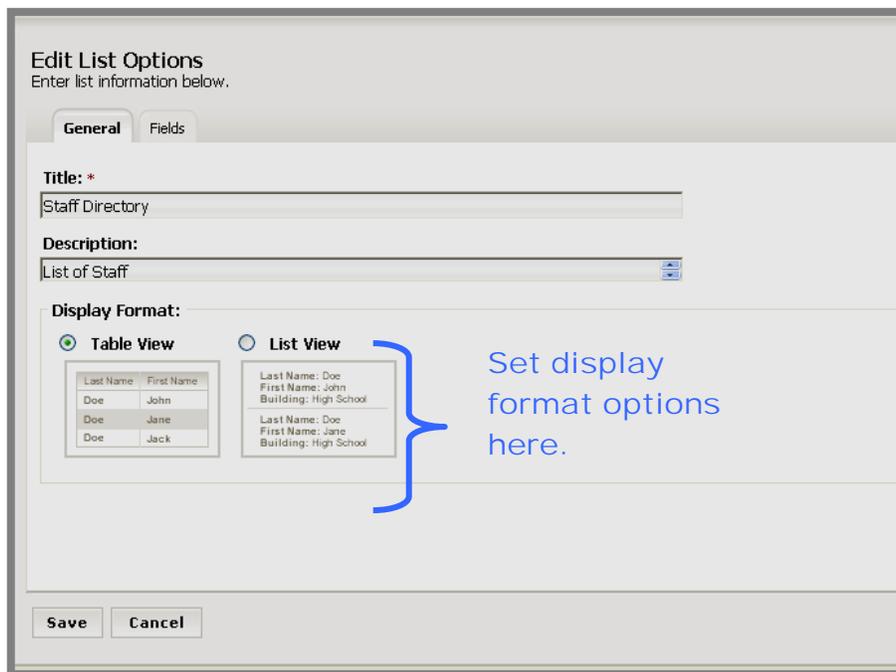


Figure 31: General tab: set display options

## Working with Directories and Lists

### Editing a List

To edit a directory or list:

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

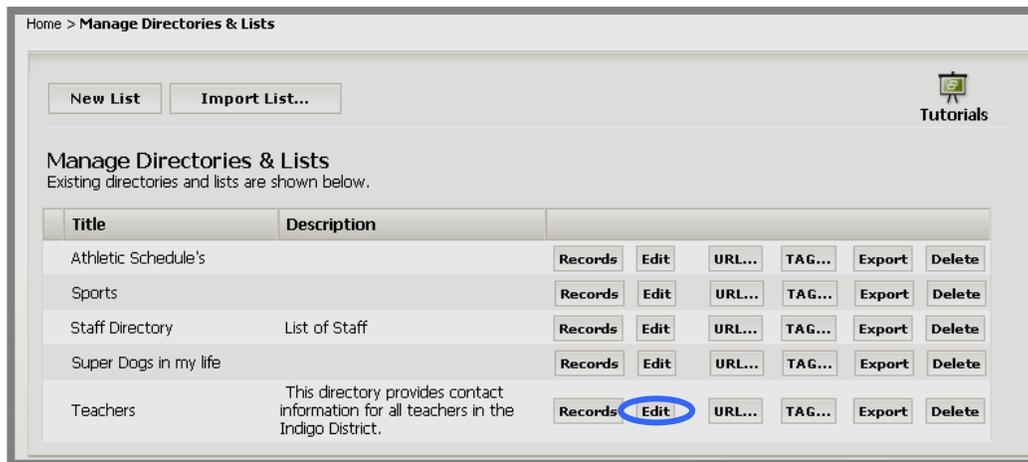


Figure 32: Manage Directories & Lists window

3. Click on the *Edit* button to the right of the list you wish to edit. An *Edit List Options* window like the one shown in Figure 33 will display.
4. Make the desired changes on the *General* tab or the *Fields* tab.

Figure 33: Edit List Options window

- Click on the *Save* button. If the directory or list was deployed on an active *page*, you can view the changes on the end user website.

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

### Managing the Records within a List

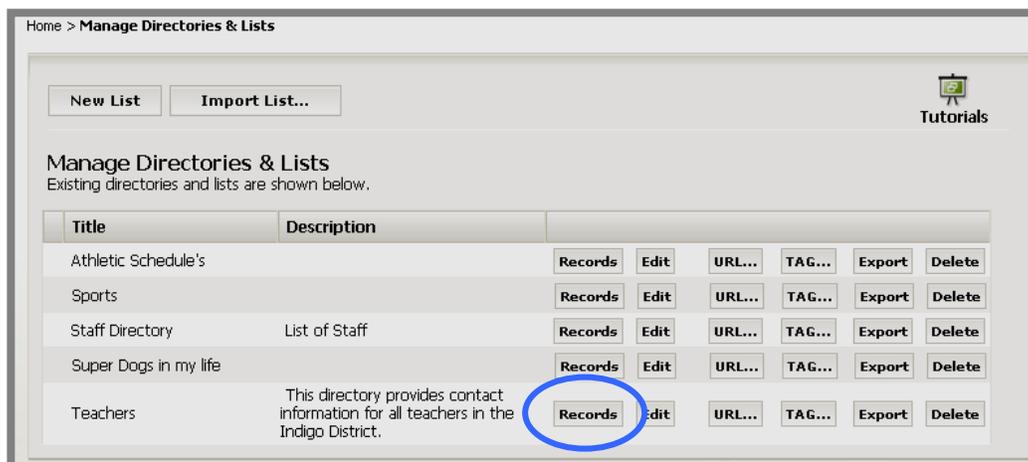
You can:

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

#### Editing a Record

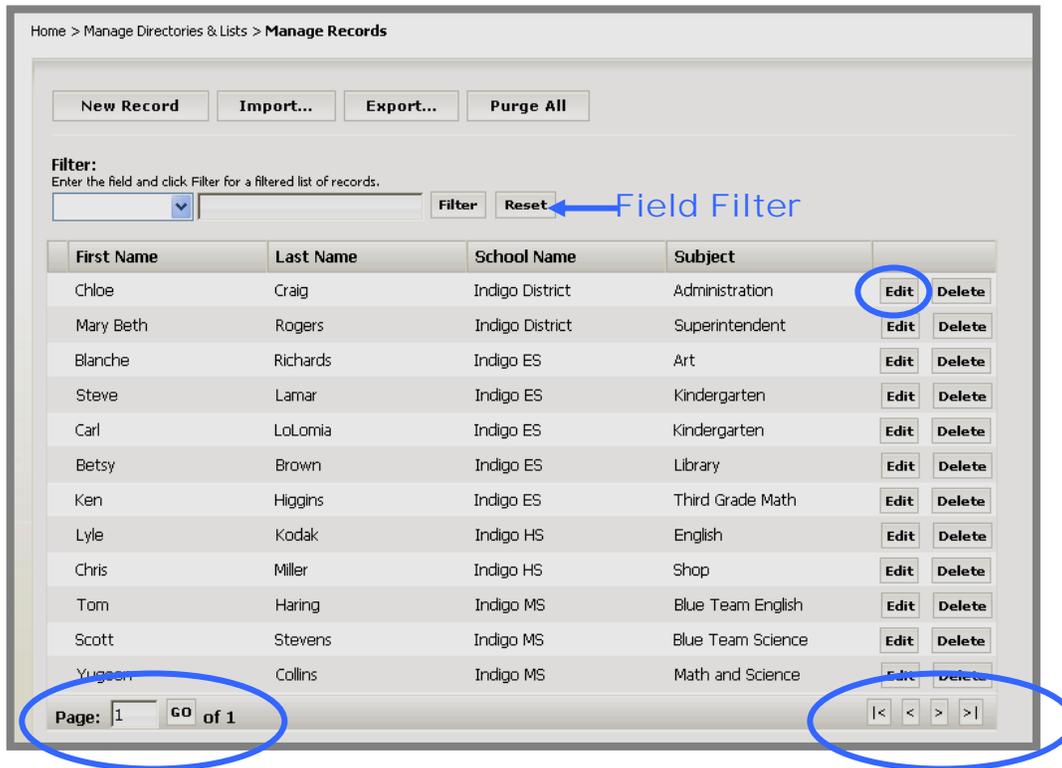
To edit a record within a directory or list:

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



**Figure 34: Manage Directories & Lists window**

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



**Figure 35: Manage Records window**

4. Click on the *Edit* button to the right of the record you want to edit. An *Edit Record* window like the one shown in Figure 36 will display.

Note: You can locate the record by:

- Using the *Field* filter at the top of the window.
- Using the *Go* button at the bottom left of the window to get to a certain page. Enter the page number and click the *Go* button. That page of records will display.
- Using the arrows at the bottom right of the window to move through the list of records one page at a time or move to the first or last page of records.

**Figure 36: Edit Record window**

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

### Exporting Records

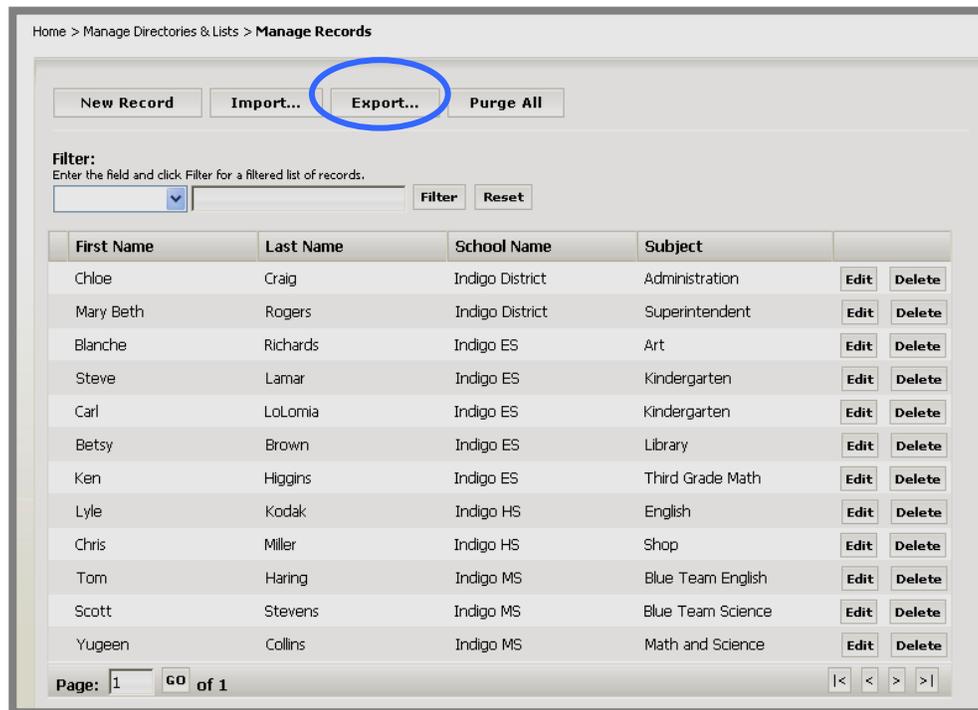
To export the records from a list:

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

Title	Description	Records	Edit	URL...	TAG...	Export	Delete
Athletic Schedule's		Records	Edit	URL...	TAG...	Export	Delete
Sports		Records	Edit	URL...	TAG...	Export	Delete
Staff Directory	List of Staff	Records	Edit	URL...	TAG...	Export	Delete
Super Dogs in my life		Records	Edit	URL...	TAG...	Export	Delete
Teachers	This directory provides contact information for all teachers in the Indigo District.	Records	Edit	URL...	TAG...	Export	Delete

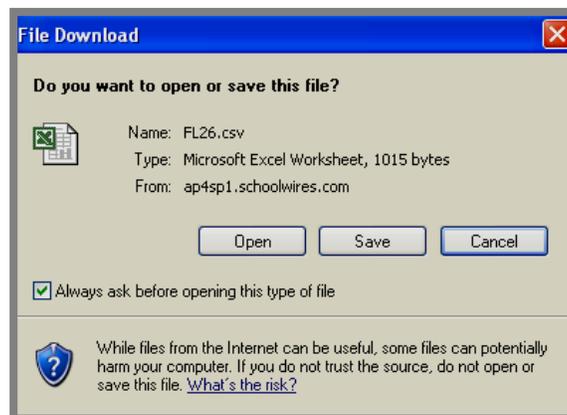
**Figure 37: Manage Directories & Lists window**

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



**Figure 38: Manage Records window**

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



**Figure 39: File Download window**

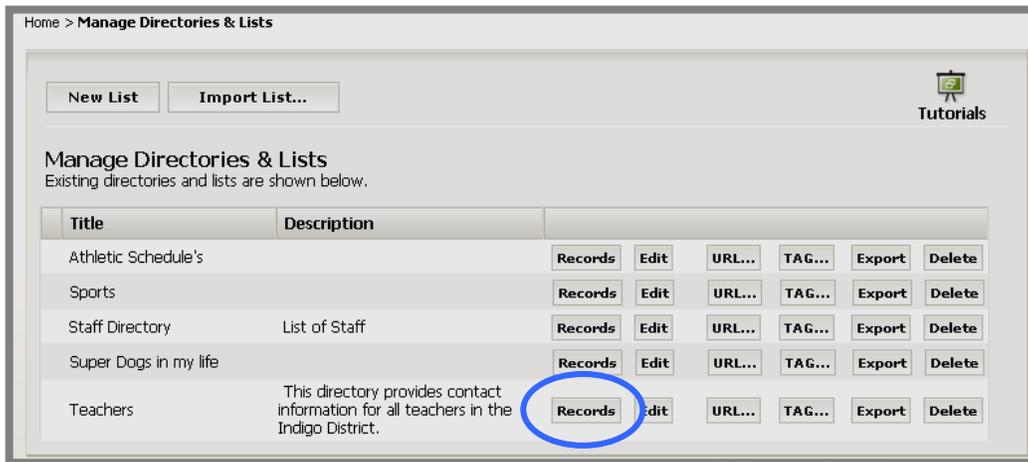
- Click on the *Save* button to save the export file to your computer and open it in Excel or click on the *Open* button to open it in Excel immediately.

Note: You can change the system-generated file name after you have saved the file.

### Deleting a Record

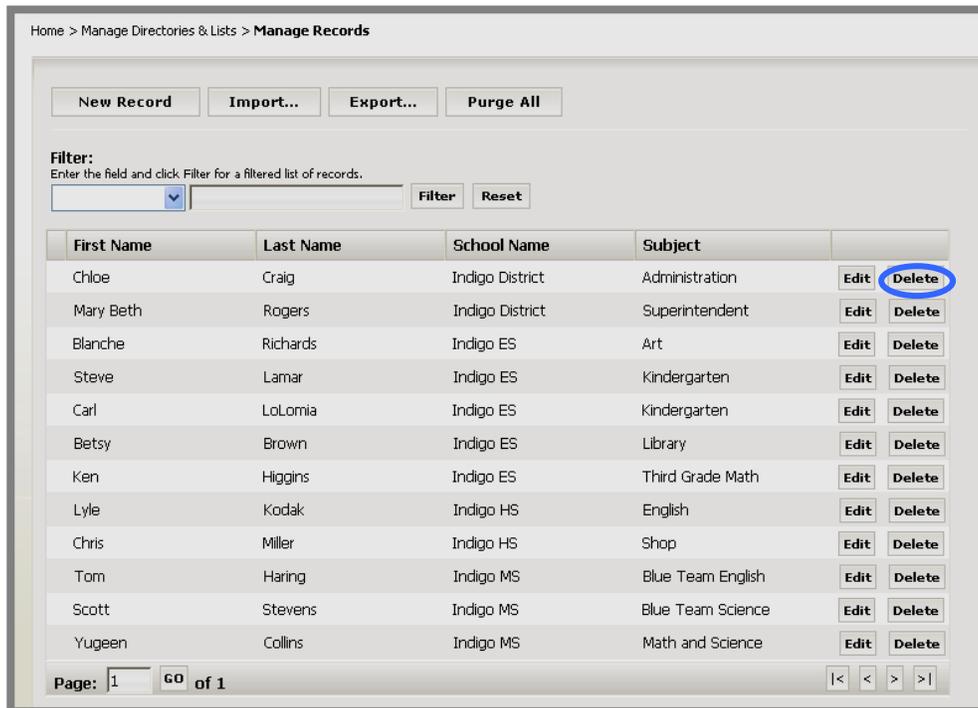
To delete a record from a list or directory:

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



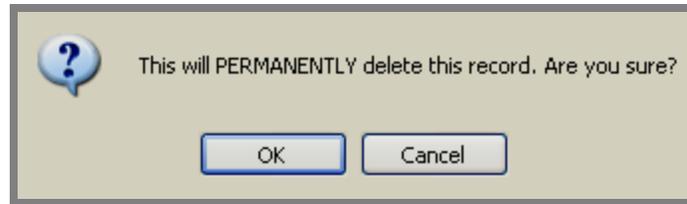
**Figure 40: Manage Directories & Lists window**

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



**Figure 41: Manage Records window**

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



**Figure 42: Delete confirmation dialog box**

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

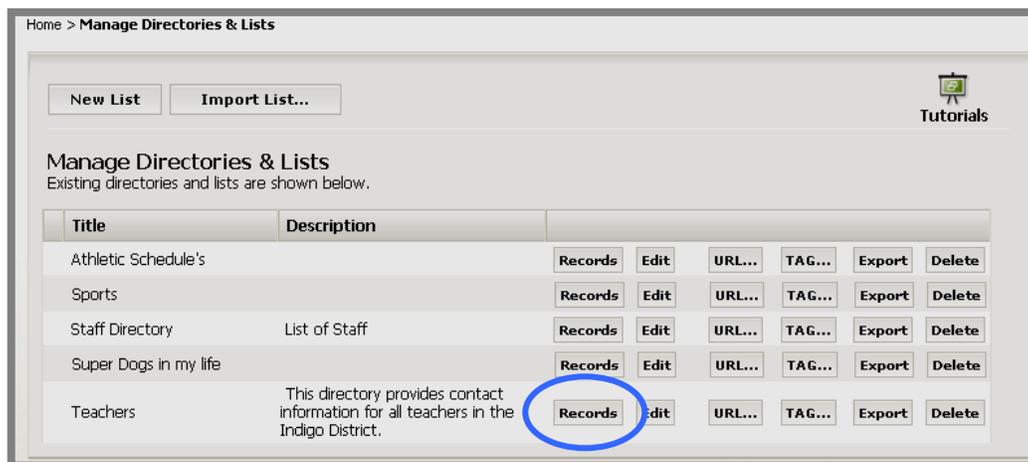
### Purging Records

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

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

To purge all the records from a list or directory:

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



**Figure 43: Manage Directories & Lists window**

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

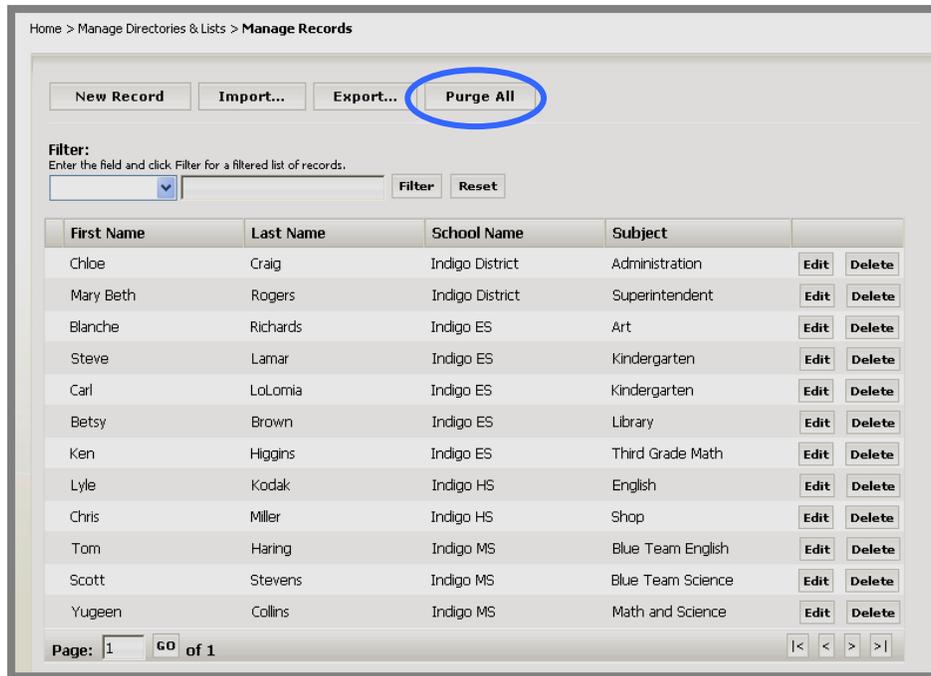


Figure 44: Manage Records window

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

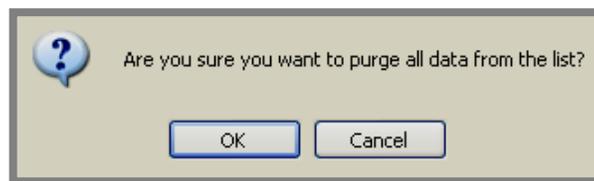


Figure 45: Purge confirmation dialog box

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



Figure 46: Manage Records window after purge

## Exporting and Importing List Configurations

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

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

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

The screenshot shows a web interface for editing a list configuration. The breadcrumb trail is 'Home > Manage Directories & Lists > Edit List Configuration'. The main heading is 'Edit List Options' with the instruction 'Enter list information below.' There are two tabs: 'General' (selected) and 'Fields'. A note states 'All fields marked with an asterisk (\*) are required.' The 'Title:' field is required and contains 'Teachers'. The 'Description:' field contains 'This directory provides contact information for all teachers in the Indigo District.' Under 'Display Format:', there are two radio buttons: 'Table View' (selected) and 'List View'. Below 'Table View' is a table with columns 'Last Name' and 'First Name' and rows: 'Doe John', 'Doe Jane', 'Doe Jack'. Below 'List View' is a list of text: 'Last Name: Doe', 'First Name: John', 'Building: High School', 'Last Name: Doe', 'First Name: Jane', 'Building: High School'. At the bottom are 'Save' and 'Cancel' buttons.

Figure 47: List Configuration: General tab

Home > Manage Directories & Lists > **Edit List Configuration**

**Edit List Options**  
Enter list information below.

General **Fields**

Field Name	Display Roles	Filter Type	Sort Type	Sort Order
First Name	Edit Roles	None	None	None
Last Name	Edit Roles	Free Form	Ascending	3
School Name	Edit Roles	Drop Down	Ascending	1
Subject	Edit Roles	Drop Down	Ascending	2
School Phone Number	Edit Roles	None	None	None
Email Address	Edit Roles	None	None	None
Home Phone Number	Edit Roles	None	None	None
Section	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None
	Edit Roles	None	None	None

Save Cancel

Figure 48: List Configuration: Fields tab

### Exporting a List Configuration

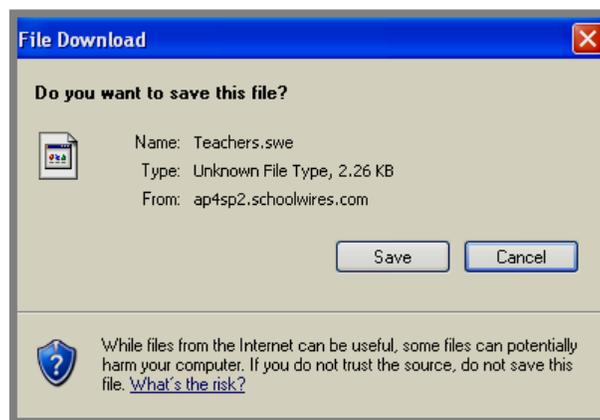
To export the configuration of a list:

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



**Figure 49: Manage Directories & Lists window**

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



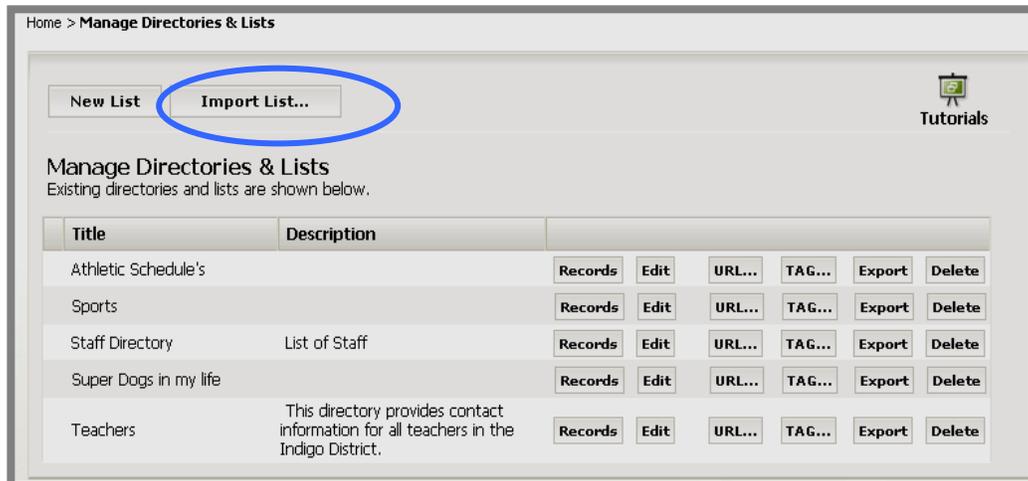
**Figure 50: File Download window**

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

### Importing a List Configuration

To import the configuration of a list:

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



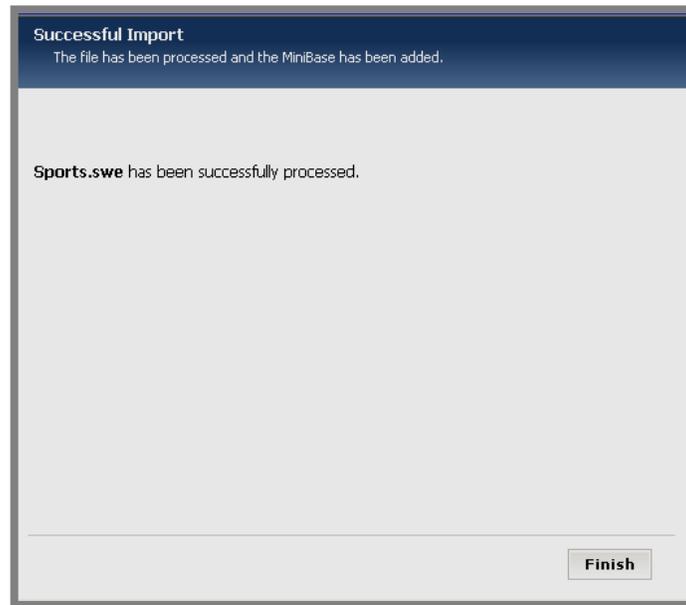
**Figure 51: Manage Directories and Lists window**

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



**Figure 52: Step 1 of Import List wizard**

4. Click on the *Browse* button. Browse your computer until you locate the file you wish to import.  
Note: It must be a file with an SWE extension, either one you exported or one you downloaded from *Schoolwires*.
5. Highlight the file.
6. Click the *Open* button. Step 1 of the *Import List* wizard will return as the active window. The file path for the file you chose will display.
7. Click the *Next* button. You will get a message saying your file is uploading. When the import is completed, a *Successful Import* window like the one shown in Figure 53.



**Figure 53: Successful Import window**

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

## Deleting a List

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

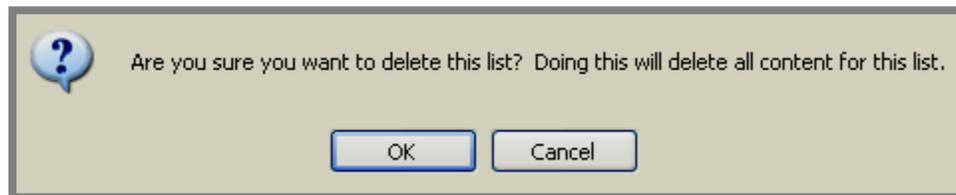
To delete a directory or list:

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



**Figure 54: Manage Directories & Lists window**

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



**Figure 55: Delete list confirmation dialog box**

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

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