# MiniBase Workbook

## Schoolwires® Centricity2™

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# Introduction

With the **MiniBase** app, you can create, manage and deploy searchable lists for use by the visitors to your website. Examples of what **MiniBase** might be used for include...

| Directories | Lists of Places: | Things: |
|---|---|---|
| • Staff by Grade, School, Subject<br>• Coaches<br>• Alumni<br>• PTA<br>• School Board | • Sports Venues/fields<br>• District Facilities/Schools<br>• Field Trips | • Athletic schedules<br>• Book lists<br>• Guidance Office resources<br>• Homework Assignments<br>• Extracurricular Club Listings<br>• Schedules |

Here is an example of an Alumni Directory that is searchable by first and last name. You enter as much information as you know and click **Submit**.

Examples of the search results are shown below. A List View is on the left and a Table View is on the right. Notice that a search of only the letter "J" in the first name field of the Table View returns all the records that have first names beginning with the letter "J".

**Alumni Directory**

Search this directory

**First Name** _____

**Last Name** _____

Submit

**Alumni Directory**

Search this directory

1.  First Name: Jane
    Last Name: Doe
    Graduation Year: 1990
    Email Address: jadoe@schoolwires.com

**List View**

**Alumni Directory**

Search this directory

| First Name | Last Name | Graduation Year | Email Address |
|---|---|---|---|
| Jane | Doe | 1990 | jadoe@schoolwires.com |
| John | Doe | 1994 | jdoe@schoolwires.com |

**Table View**

**Note**: You do not need to set up **MiniBase** as a searchable database; you can simply use it to create organized lists of information. Below is an example of a summer reading list that was created using **MiniBase**.

**Summer Reading**

| Book Title | Author | Category | Part of a Series | Pages |
|---|---|---|---|---|
| A New Coat for Anna | Ziefert, Harriet | Non-Fiction | No | 40 |
| Amazing Grace | Hoffman, Mary | Non-Fiction | No | 32 |
| Amber Brown Is Not A Crayon | Danziger, Paula | Fiction | No | 88 |
| Boxcar Children #1 | Warner, Gertrude Chandler | Fiction | Yes | 154 |
| Bubba and Beau: Best Friends | Appelt, Kathi | Fiction | Yes | 32 |

## Create a New MiniBase

To create a new MiniBase…

1. **Add** a *MiniBase* App to your page by selecting Add App in Design View.

    **Notes**:
    - *MiniBase* is not available as a Page Type.
    - You can also create a *MiniBase* in *App Manager*.

2. **Edit** the App. Since you are creating a new directory, you will be prompted to add your fields. You can do that now or you can do it later.
3. Select **App Options**. The App Options window opens.
4. On the *General* Tab…
    a. Edit the name for the MiniBase in the *App Name* field as required.
    b. Enter a description for the list if desired.
    c. If you wish to show the app name (name of the MiniBase) on your page, click in the checkbox next to "Show the app name on my page."
    d. Click the radio button above the **Display Format** you wish to use for the search results or list on your website.
6. Click the **Fields** tab. A Field*s* window like the one shown below will display. Here you will configure your MiniBase. You will decide 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. Enter **Field Names** if you have not yet done this. For example, in the Alumni Directory above, the field names are First Name, Last Name, Graduation Year and Email Address.

    b. Click **Edit** under Viewers to determine who will be able to view each field. If you do not specify, the general public will be able to see each field.

| Field Name | | Viewers | Filter Type | | Sort Order | | Sort Level |
|---|---|---|---|---|---|---|---|
| First Name | | Edit | Free Form | ▼ | Ascending | ▼ | None |
| Last Name | | Edit | Free Form | ▼ | Ascending | ▼ | 1 |
| Graduation Year | | Edit | None | ▼ | Ascending | ▼ | 2 |
| Email Address | | Edit | None | ▼ | None | ▼ | None |

*(Tabs: General | Fields)*

c. To make the field searchable, 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 lot of data to search. For instance, for the Teacher Directory, you might choose this filter type for the Last Name field 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 data. In the teacher directory, it might be the list of schools or a list of subjects.

d. To determine the **Sort Orde**r for displayed data if you've made that field searchable, choose one of these.

i. Ascending order (i.e., lowest to highest, A to Z)

ii. Descending order (e.g., highest to lowest, Z to A)

e. Choose a **Sort Level** of fields in the display. For instance, for the Teacher Directory, you might have it display by school first, then by subject and finally by teacher last name. You can have up to four sort levels.

6. Click **Save**. The Records window will return as the active window.

## Add Records to the MiniBase:

Once you have configured your MiniBase, you will need to add the data records. There are two ways to add records…

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

### Add Records One at a Time

To add records one at a time…

1. Access your Site, Subsite or Section Workspace.
2. **Edit** the MiniBase app.
3. Click **New Record** at the top left of the window. A New Record window will display as shown below. The fields that are in the New Record window will be the same as the fields you entered when you created the MiniBase.
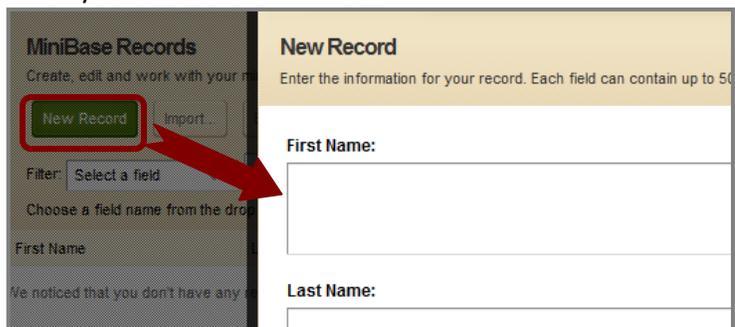


4. Enter the information required.

5.  Click **Save and Continue** if you wish to add more records. Click **Save and Exit** when you are finished adding records. The Records window will return as the active window. The record or records you entered will display in the list of records.

### Import Records:

1.  Create a Comma Separated Values (CSV) file using a text editor like Notepad or 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).

    **Some important notes on the CSV file:**

    *   Fields names in the CSV file must correspond to the fields you created for the MiniBase.

    *   The fields in the CSV file must be in the **same order** as the fields in the MiniBase.

    *   The field names must comprise the Header Row in the CSV file.

2.  After you have created the CSV file, access your Site, Subsite or Section Workspace.

**3.**  **Edit** the *MiniBase* app to which you'd like to import records.

4.  Click **Import** at the top of the window. **Step 1** of the **Import** wizard displays.



5.  Click **Browse**. Browse your computer for the CSV file you created.

6.  Select the CSV file you created.

7.  Click **Next**. **Step 2** of the **Import** wizard displays. At this point, you can preview your imported records or cancel the import if desired.

8.  Click **Import**. A message will appear in the lower left hand corner letting you know your upload was successful. The Records window will return as the active window. The records you just imported will be in the record database.

## Deploy the MiniBase

Once you have created your MiniBase, you will need to deploy it. You can do this by adding the app to a page if you created it in *App Manager* or on another page, or by using embedding it in a page.

- To add a *MiniBase* app you already created to a page…
    a. Navigate to the workspace where you created the *MiniBase*.
    b. Access **Design** mode to the page to which you'd like to add the *MiniBase.*
    c. Click **Add App**. The Available Apps window displays.
    d. Click **Select an existing App** on the bottom left of the window. The Add Existing Apps window displays.
    e. Click the **By Type** tab.
    f. Choose *MiniBase* from the drop-down list.
    g. Select the appropriate *MiniBase*.
    h. Click **Save**.
    i. Click **I'm Done** to close the Design window.

- To embed the *MiniBase* into a Flex Editor app on a page within the workspace where you created it…
    a. Place your cursor where you'd like the *MiniBase*.
    b. Click the Insert *MiniBase* icon . The Add Existing Apps window displays.
    c. Click the **By Type** tab.
    d. Choose *MiniBase* from the drop-down list.
    e. Select the appropriate *MiniBase*.
    f. Click **Save**. Continue working in the *Editor* as required.

## Exercises

### Exercise 1: Create a List

1. Sign in and access *Site Manager*.

2. **Add** a *MiniBase* App to your page by selecting Add App in Design View.

3. Enter a name for your MiniBase: **{YourLastName} Staff Directory** and click Save.

4. Click I'm Done

5. **Edit** the App. Since you are creating a new directory, you will be prompted to add your fields. You can do that now or you can do it later.

6. Select **App Options**.

7. On the **General** tab: Enter a Description and select the Table View radio button.

8. On the **Fields** tab, enter the following **Field Names**.

   a. Last Name

   b. First Name

   c. School

   d. Grade Level

   e. Email Address

   f. Phone Number

   g. Subject

9. For the following fields, set these options:

   a. Last Name: *Filter Type* = Free Form; *Sort Type* = Ascending; *Sort Order* = 3

   b. First Name: *Filter Type* = None; *Sort Type* = Ascending

   c. School: *Filter Type* = Dropdown; *Sort Type* = Ascending; *Sort Order* = 1

   d. Grade Level: *Filter Type* = Dropdown; *Sort Type* = Ascending; *Sort Order* = 2

   e. Email Address: *Filter Type* = None

   f. Subject: *Filter Type* = Dropdown; *Sort Type* = Ascending

10. Click **Save**.

11. Select **App Options**.

12. Click on the **Fields** tab.

13. Click **Edit** under Viewers.

14. Assign yourself as the viewer for the phone number.

15. Close the Viewing Rights window.

16. Click **Save** and close the app.

## Exercise 2: Add Records

1. Sign in and access *Site Manager*.

2. Select *MiniBase* from the **Tools** tab (App Manager window opens with MiniBase apps selected).

3. Click on the name of the MiniBase you created in Exercise 1 in the App Instances column. Its details display in the Details column on the far right.

4. Click **Edit**. The *MiniBase* app window opens.

5. To manually add records to your MiniBase…

    a. Click **New Record**.

    b. Enter the content for each field.

    c. Click **Save and Continue** to add more records.

    d. When you are finished entering your last record, click **Save and Exit**.

6. To Import multiple records
   Note: To make this easier, you can export your records that you entered in Step 5. You need at least one record to use **Export**. Generally, you would have already created a CSV file prior to beginning the import.

    a. Click **Export**.

    b. **Save** the CSV file to your computer.

    c. Enter additional information into the file.

    d. **Save** the file, keeping it in the CSV format.

    e. Back in *Site Manager*, click **Import**. The Import Records window opens.

    f. Browse out and find your file, then click **Next**.

    e. The system will display a preview of the information you are importing. If you are satisfied, click **Import**.

## Exercise 3: Deploy your MiniBase

To insert a *MiniBase* into a Flex Editor App in the same section where you created the *MiniBase*…

1. Create and edit the Flex app.

2. Click in the *Editor* and select the Insert *MiniBase* icon from the *Editor* tool bar.

3. Select the desired *MiniBase* from the drop-down menu and click **Save**. You will see something similar to [$APP ID=245$] in the *Editor*. The ID number is a specific number assigned to that *MiniBase*.

4. Click **Save** and view the page on the website.

To insert a *MiniBase* app into a page…

Note: To insert a *MiniBase* into a page that is in a different workspace from where you created the *MiniBase*, you'll need to share that *MiniBase* app with yourself. If another editor will be inserting it into his or her page, you'll need to share it with that editor.

1. Navigate to the workspace where you would like to use the app.

2. Access **Design** mode for the page in which you'd like to display the *MiniBase.*

3. Click **Add App**. The Available Apps window displays.

4. Click **Select an existing App** in the lower left corner of the window.

5. Locate and select the *MiniBase*.

6. Click **Save** and view the page on the website.