

## Overview

With the **Directories & Lists (MiniBase)** enhancement module, 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:
<ul style="list-style-type: none"> <li>• Staff by Grade, School, Subject</li> <li>• Coaches</li> <li>• Alumni</li> <li>• PTA</li> <li>• School Board</li> </ul>	<ul style="list-style-type: none"> <li>• Sports Venues/fields</li> <li>• District Facilities/Schools</li> <li>• Field Trips</li> </ul>	<ul style="list-style-type: none"> <li>• Athletic schedules</li> <li>• Book lists</li> <li>• Guidance Office resources</li> <li>• Homework Assignments</li> <li>• Extracurricular Club Listings</li> <li>• Schedules</li> </ul>

Here is an example of an Alumni Directory that is searchable by first and last name. You can fill out as much information as you know and click on the *Submit* button.

### Alumni Directory

Search this directory

**First Name**

**Last Name**

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

List View

### Alumni Directory

Search this directory

1. **First Name:** Jane  
**Last Name:** Doe  
**Graduation Year:** 1990  
**Email Address:** [jdoe@schoolwires.com](mailto:jdoe@schoolwires.com)

Table View

### Alumni Directory

Search this directory

First Name	Last Name	Graduation Year	Email Address
Jane	Doe	1990	<a href="mailto:jdoe@schoolwires.com">jdoe@schoolwires.com</a>
John	Doe	1994	<a href="mailto:jdoe@schoolwires.com">jdoe@schoolwires.com</a>

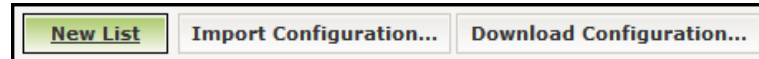
**Note:** You do not need to set up **MiniBase** as a searchable database; you could simply use it to create organized lists of information. Below is an example of a summer reading list that was created using **MiniBase**.

### Summer Reading List

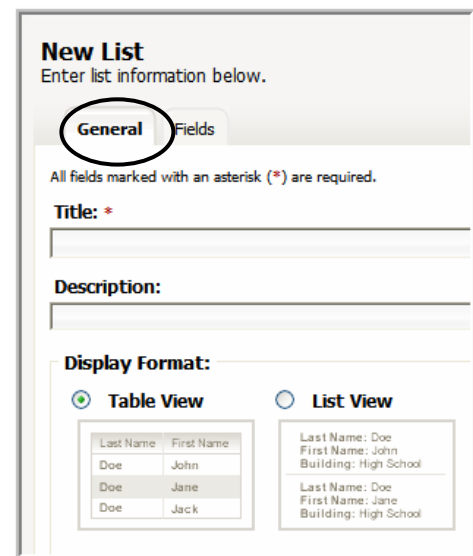
Book Title	Author	Category	Part of a Series	Pages
A New Coat for Anna	Ziefert, Harriet	Non-Fiction	No	40
Amazing Grace	Hoffman, Mary	Non-Fiction	No	32
Amber Brown Is Not A Crayon	Danziger, Paula	Fiction	No	88
Boxcar Children #1	Warner, Gertrude Chandler	Fiction	Yes	154
Bubba and Beau: Best Friends	Appelt, Kathi	Fiction	Yes	32
Buffalo Bill and the Pony Express	Coerr, Eleanor	Fiction	No	69
Charlotte's Web	White, E.B	Fiction	No	192
Chocolate Fever	Smith, Robert Kimmel	Fiction	No	96

## How to create a new directory or list:

- 1) Access MiniBase from the *Tools* tab or the *Tools* drop-down menu in the *Section Workspace* where you want to create the list. Note: MiniBase needs to be enabled by a Site Director or Subsite Director.
- 2) Click on the *New List* button to create your list. Note: Configurations for frequently created lists are available for download.



- 3) Under the *General* Tab, complete the following:
  - a. Enter a name for the list in the *Title* field.
  - b. Enter a description for the list if desired.
  - c. Click in the radio button above the **Display Format** you wish to use to display the search results or list on your website.



**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

General tab

- 4) Click on the *Fields* tab. A *Fields* window like the one shown below will display. Here you will configure your searchable list or directory. 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.



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

General **Fields**

Field Name	Display Roles	Filter Type	Sort Type	Sort Order
First Name	Edit Roles	Free Form	Ascending	None
Last Name	Edit Roles	Free Form	Ascending	1
Graduation Year	Edit Roles	None	Ascending	2
Email Address	Edit Roles	None	None	None

Fields tab

- a. Enter *Field Names*. For example in the Alumni Directory above, the field names are First Name, Last Name, Graduation Year and Email Address.
- b. Click on the *Edit Roles* button 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.

- c. To make the field searchable, enter a Filter Type. You can choose from:
    - (1) **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.
    - (2) **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.
    - (3) **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 control the This determines the sort order for displayed data after searching that field. Your choices are:
    - (1) Ascending order (i.e., lowest to highest, A to Z)
    - (2) Descending order (e.g., highest to lowest, Z to A)
  - e. This determines the sort order 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.
- 5) Click on the *Save* button. The *Manage Directories & Lists* window will return as the active window.

## How to add records to the list:

Once you have configured your list, you will need to add the data records for the list. There are two ways to add records:

- 1) Add records one at a time.
- 2) Import records.

## How 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.
- 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 below will display.



- 4) Click on the *New Record* button 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 list or directory.
- 5) Enter the information required.
- 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.

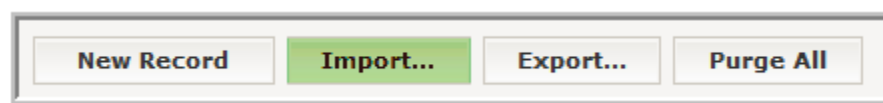


## How to import records:

- 1) Creating a 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:

- a. Fields names in the CSV file must correspond to the fields you created for the List.
  - b. The fields in the CSV file must be in the **same order** as the fields in the List.
  - c. The field names must comprise the Header Row in the CSV file.
- 2) To import records after you have created the CSV file: Access your *Site*, *Subsite* or *Section Workspace*.
  - 3) Click on the *Directories & Lists (MiniBase)* task from the *Tools* tab or *Tools* drop-down menu.
  - 4) Click on the *Records* button to the right of the list to which you want to import records.
  - 5) Click on the *Import* button at the top of the window. **Step 1** of the *Import Wizard* will display.

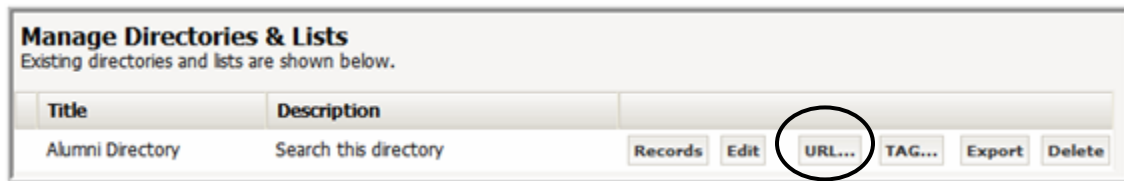



- 6) Click on the *Browse* button. Browse your computer for the CSV file you created.
- 7) Select the CSV file you created.
- 8) Click on the *Next* button. **Step 2** of the *Import Wizard* will display. At this point, you can preview your imported records or cancel the import if desired.
- 9) Click on the *Next* button. A message saying your file is uploading will display.
- 10) Click on the *Finish* button. The *Manage Records* window will return as the active window. The records you just imported will be in the record database.

## How to deploy the list:

Once you have created your directory or list, you will need to deploy it. You can do this by inserting it as a link or using the "tag" to embed it in a page.


- 1) To insert a link to the list:
  - a. Select the URL by clicking on the URL button in the *Manage Directories & Lists* window.



- b. Copy the URL to your clipboard.
  - c. Open the *page* where you would like to insert the link type in the text for the link and choose: 
  - d. Select *Insert link to a different website...*
  - e. Insert the URL for the List into the URL field.

- 2) To embed the MiniBase into a *page* in a *section* you can do one of two things:

- a. If you are embedding the list into a *page* within the *section* where the MiniBase was

created, use the *Insert Directory* icon: 

- b. If you want to embed the list into a different *page*, copy the *Tag* from the *Tag* button next to the desired List in the *Section Workspace/Tools/Directories & Lists (MiniBase)*. Paste the *Tag* into the Editor on any *page*. You will see the *Tag* display in the Editor. It will look similar to this: `[$DIRECTORY ID=17$]`

