

Work with the Staff Directory App

Blackboard Web Community Manager

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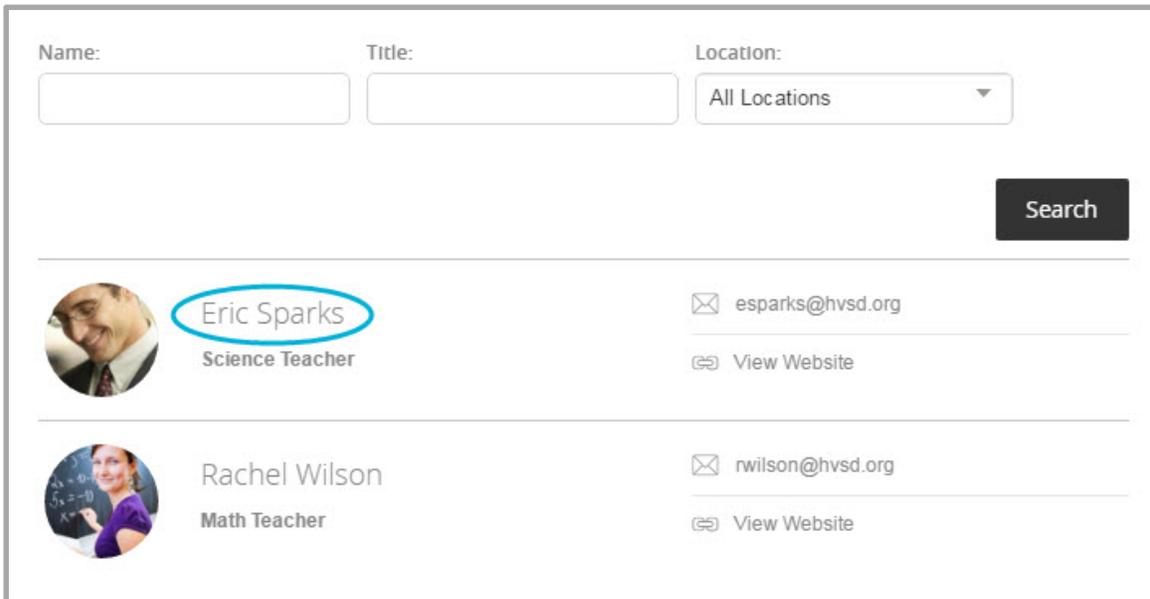
This guide covers all available features and functionality. Features included in your contract may vary.

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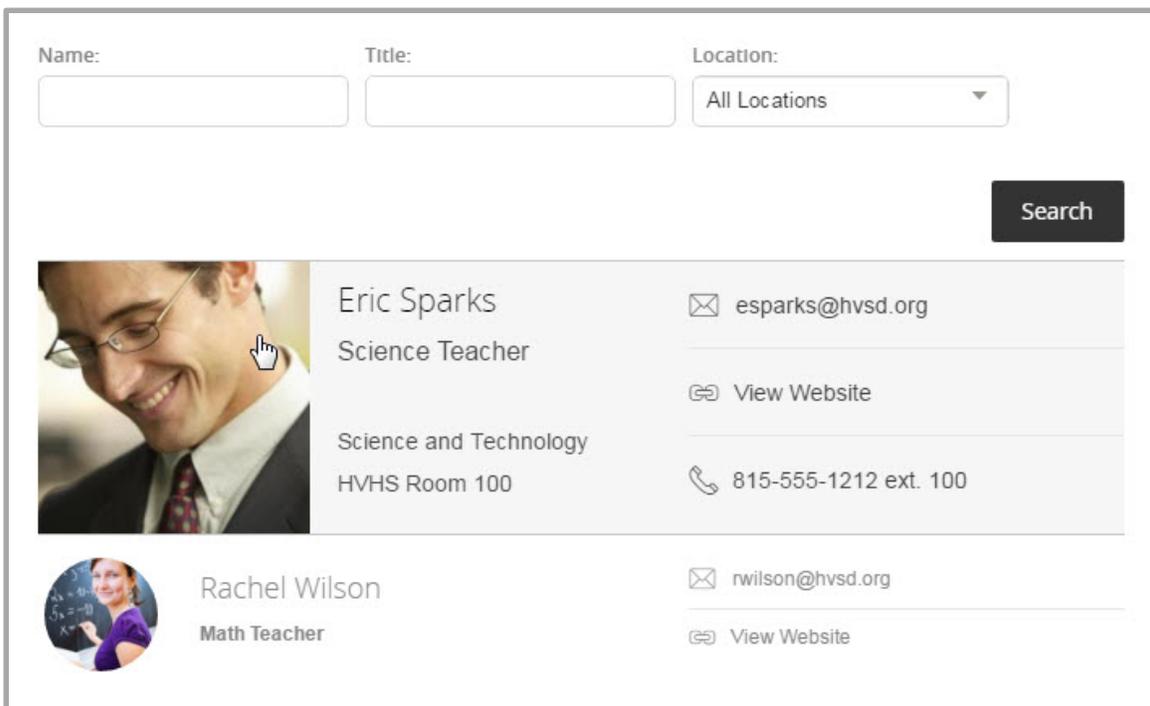
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Introduction

The Staff Directory App allows you to add and maintain information about each of your staff members. You can include names, phone numbers, extensions, email addresses and room numbers. You can create staff records manually or you can import them using a CSV file. You can export information from the app into a CSV file. Modify this file and use it to update staff information or import into a new Staff Directory App.



Click on the name of a staff member to display additional information about the staff member.



Work with the Staff Directory App

Once you have collected information for each staff member, you are ready to add a Staff Directory App to your page. Once added, you can create individual staff records manually or use **Import** to add multiple staff records at once. Use **Export** to send app records to a CSV file. You can modify the exported CSV file records and then import the file to update your staff records. You can manage staff records and remove the app from your page.

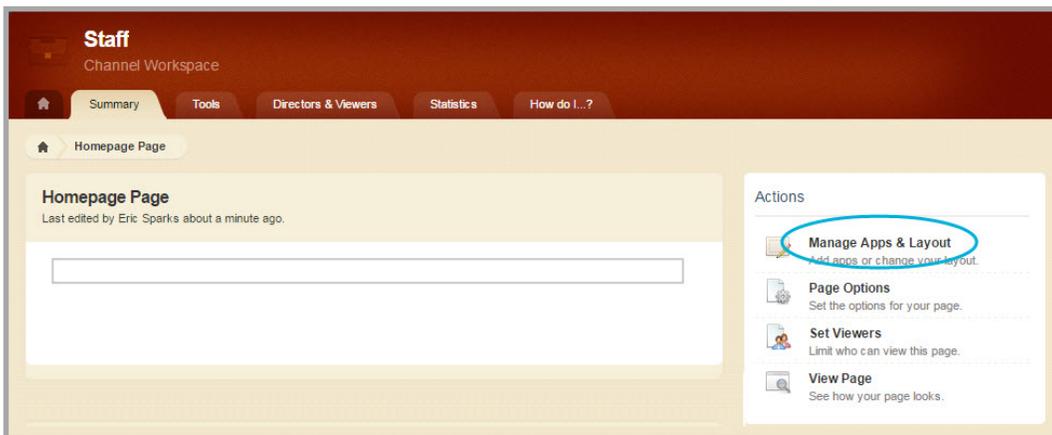
Add a Staff Directory App to a Page

Here's how you add a Staff Directory App to a page.

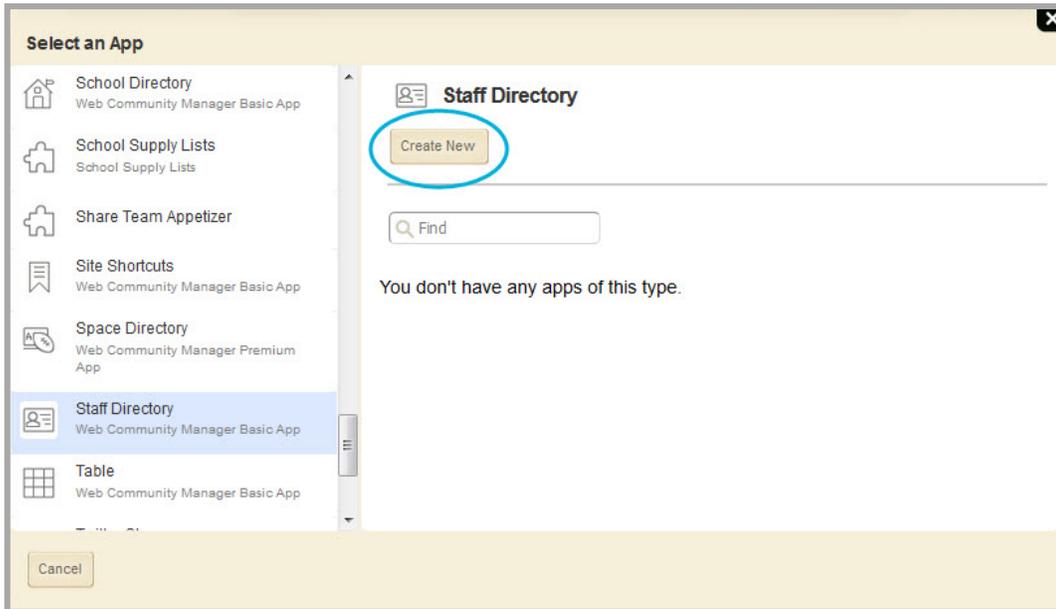
1. In *Site Manager*, navigate to the workspace containing the page to which you wish to add the app.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.



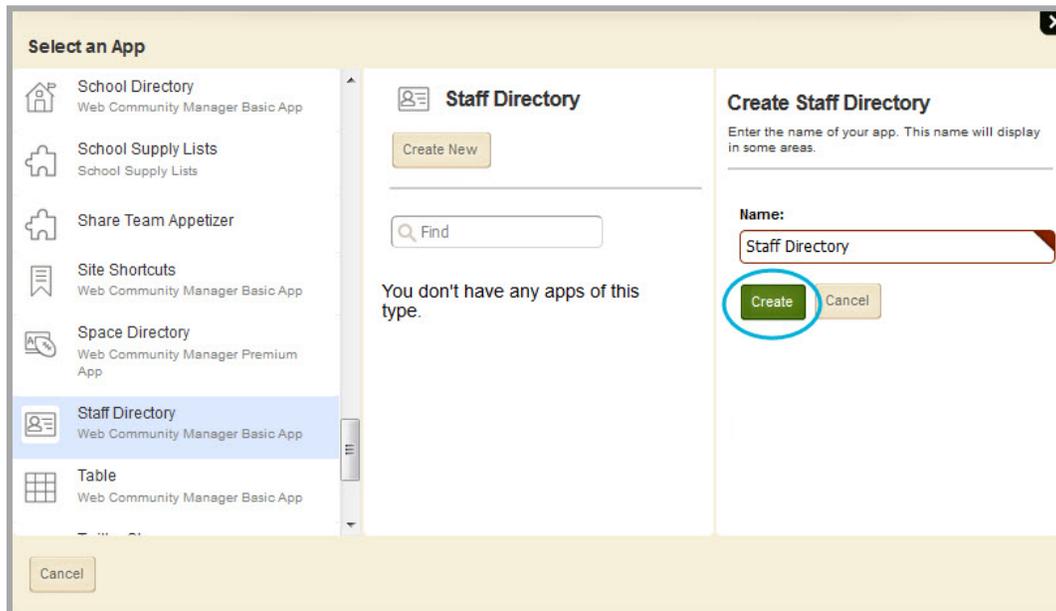
3. In *Actions*, click *Manage Apps & Layout*. The page opens in Design mode.



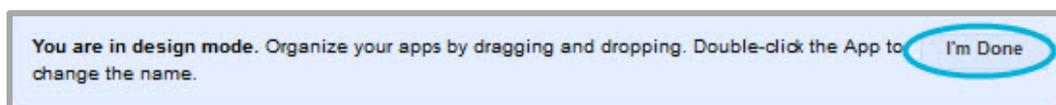
- Click **Add App**. The Available Apps dialog displays.
- Click **Staff Directory App**. Then click **Create New**.



- Enter a name for your app.



- Click **Create**. You are returned to the page in Design mode.

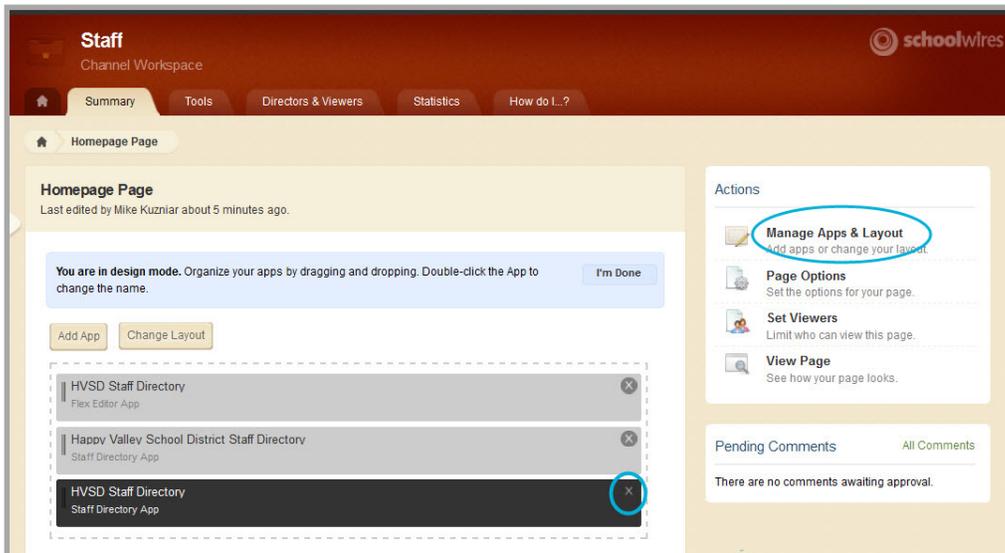


- Click **I'm Done**. You are returned to the page in Edit mode.

Remove a Staff Directory App from a Page

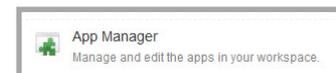
Here's how you remove a Staff Directory App from a page.

1. In *Site Manager*, navigate to the page containing the app you wish to remove.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. In Actions, click *Manage Apps & Layout*. The page opens in Design mode.
4. Position the cursor on the app you wish to remove. Note that the background color changes.

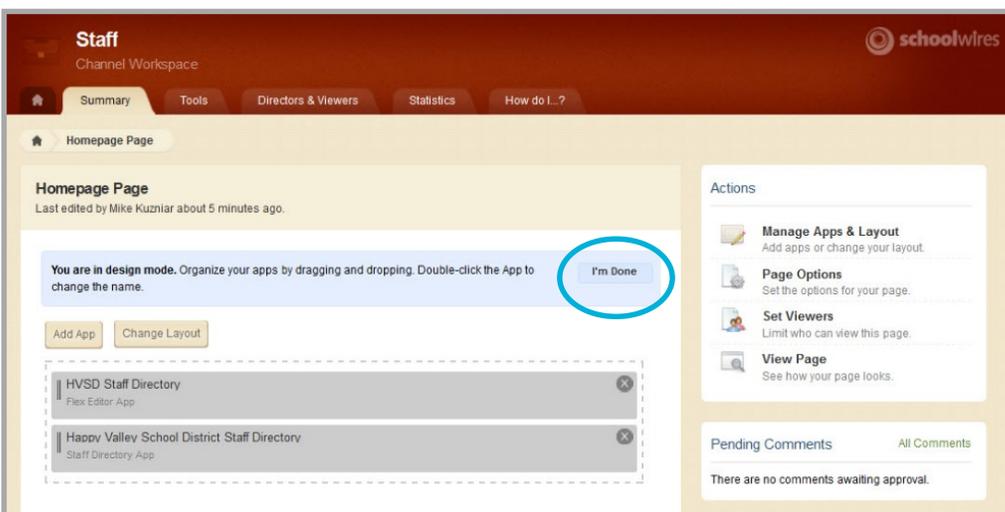


5. Click the ⊗ icon to remove the app from the page.
6. Click **Yes** on the Confirmation dialog. The app is removed from the page and you are returned to the page in Design mode.

Note that the app is removed from the page but not permanently deleted. The app is available in the local *App Manager*. Click **Tools** in the current workspace and locate the app in App Manager.



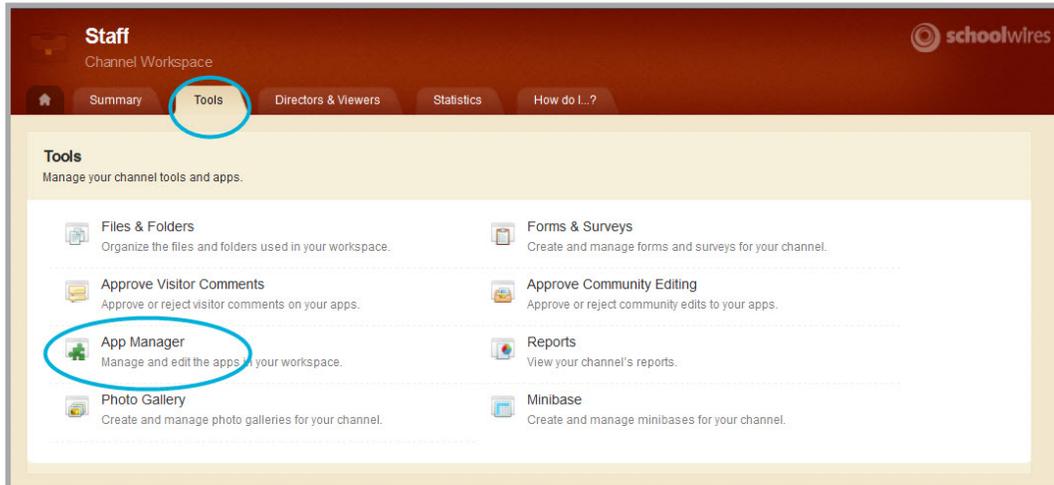
7. Click **I'm Done** to return to the page in Edit mode.



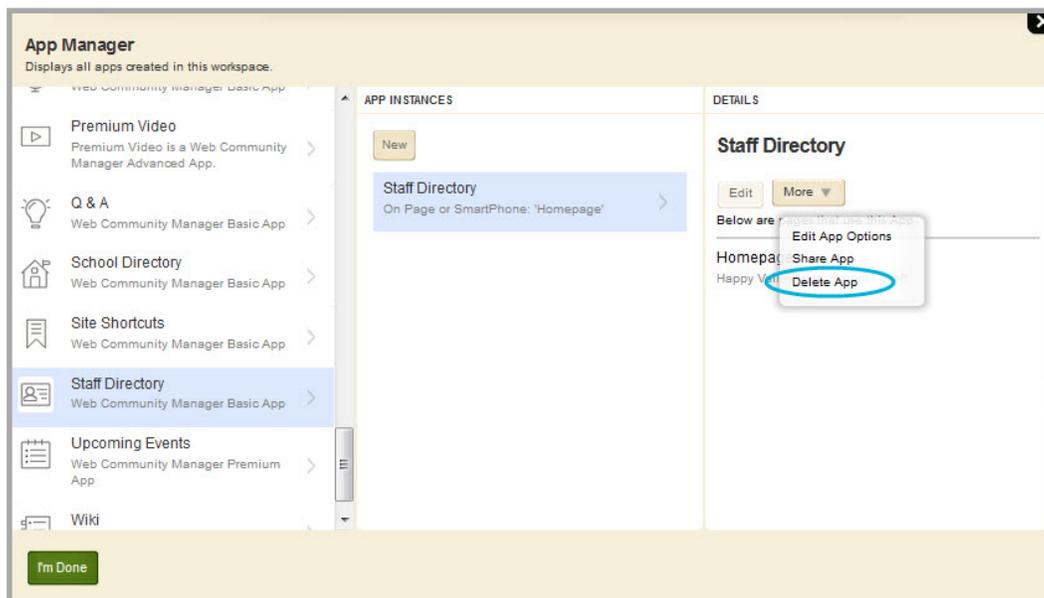
Permanently Delete a Staff Directory App

Here's how you permanently delete a Staff Directory App.

1. In *Site Manager*, navigate to the workspace containing the page with the Staff Directory App that you wish to permanently delete.
2. Click **Tools**. Workspace tools display.
3. Click *App Manager*. App Manager displays.

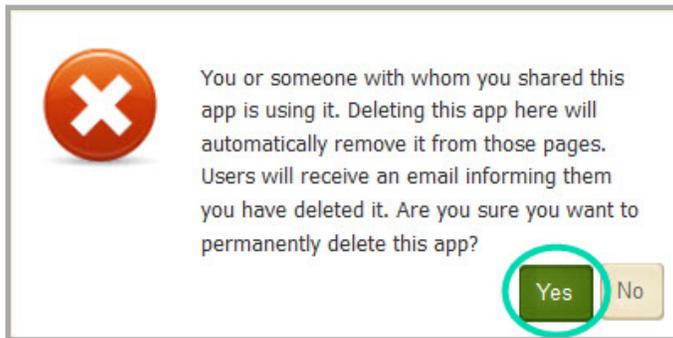


4. In the first column, locate and click the type of the app that you wish to delete. In this instance, the Staff Directory App. All apps of this type within the current workspace display in the second column.



5. Locate and click the name of the app you wish to delete. The app instance is highlighted.

- In the third column, click **More** and select *Delete App* from the drop-down list. A confirmation dialog displays.



- Click **Yes**. The app is permanently deleted from App Manager.

If you permanently delete a page in your Section Workspace Recycle Bin that contains the only instance of an app, that app is permanently deleted.

When you permanently delete an app, it is removed from your pages and the pages of any user with whom you shared the app. Shared users receive an email indicating that you have deleted the app.

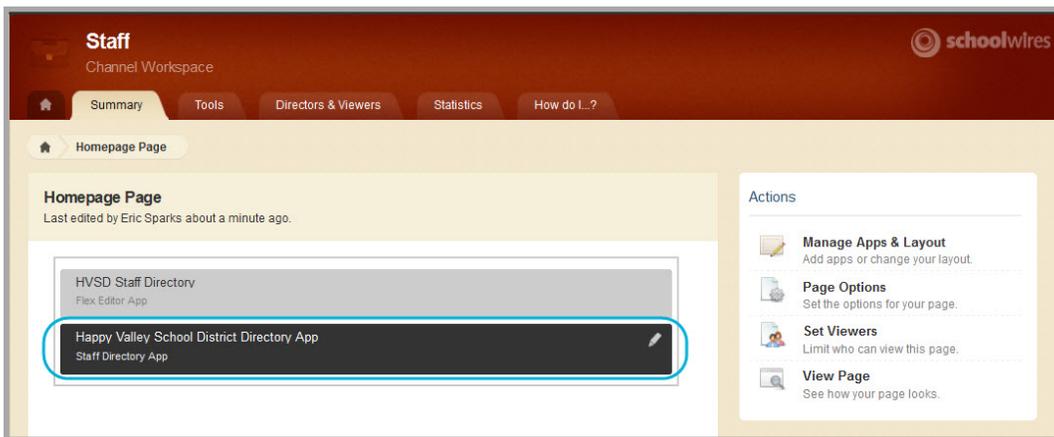
Manage Staff Directory App Records

Once you have added the app to your page, edit the app to manage staff records. You edit the app to add new records or to modify existing ones. You can also delete records from the app.

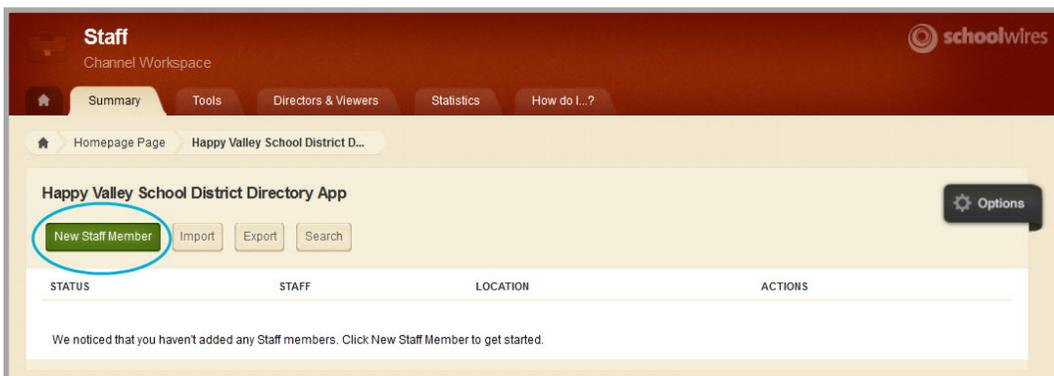
Add a New Staff Record

Here's how you add a new staff record to the app. Saved records are displayed in ABC order.

1. In *Site Manager*, navigate to the page containing the app you wish to edit.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.



3. Click on the app that you wish to edit. The Edit window displays. Note that when you position the cursor on the app, the background color changes and a pencil displays.
4. Click **New Staff Member**. The Add New Staff Member dialog displays.



5. Enter information into the fields. Note that fields flagged with a red triangle are mandatory and must be completed.

New Staff Member

First Name:

Last Name:

Image:

Contact Information

Email Address:

Phone: **Extension:**

Details

Job Title:

Department:

Location: **Room:**

URL:

Activate on my page

6. When adding an image, it is best to use one sized 350 pixels by 350 pixels. The minimum image size is 170 pixels. Images smaller than 170 pixels may render pixelated when the view is expanded on the end-user website.
7. By default, the *Activate on my page* check box is activated for the staff record. Uncheck the box to stop the display of the staff record on the page.
8. Click **Save and Exit**. You are returned to the Staff Directory App in Edit mode. Or, click **Save and New** to save the staff record and launch another New Staff Member dialog.

Import Staff Records

Use **Import** to add multiple staff records at a time to your Staff Directory App. You can also use **Import** to update existing staff records. Before you launch the Import Wizard, prepare the CSV file you will use to import your staff records.

Prepare the CSV File

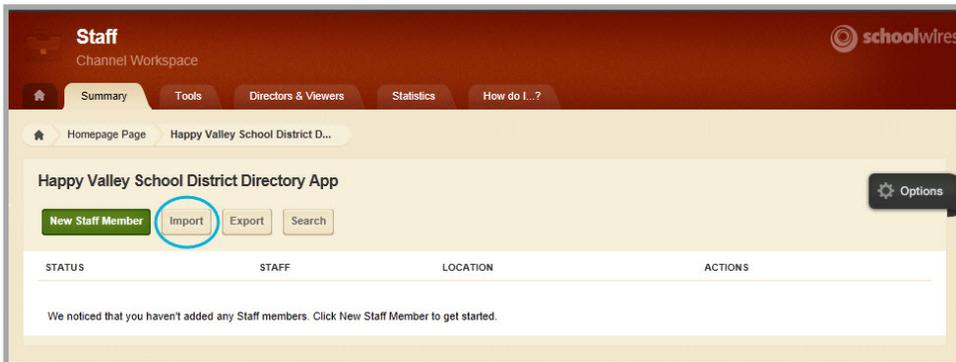
Create a CSV file and include columns for each of the fields you wish to import. These are the fields you may include in the import file.

Column	Description
<i>System ID</i>	<p>Use this field when you are updating existing staff records. It is NOT required for a new staff record. When a new staff record is added to the Staff Directory App, it is assigned a System ID number. When updating staff records using Import, you need to include the System ID in the CSV file— it is used to identify the staff member to which modifications are to be applied.</p> <p>You obtain the System ID numbers for each staff member by exporting the staff records for the app.</p> <p>Again, if you are importing new staff records, there is no need to include the System ID in your CSV file.</p>
<i>Last Name</i>	Enter the last name of the staff member. This is a required field.
<i>First Name</i>	Enter the first name of the staff member. This is a required field.
<i>Full Name</i>	Enter the full name of the staff member. If you plan to use Search to locate staff members by name, you must enter a value for Full Name (First Name Last Name, e.g., Eric Sparks) for each staff member and map the field when you import the CSV file.
<i>Image</i>	Enter the URL for the staff member's image. To locate the URL the image will need to be uploaded to Files & Folders and you will use the Get Link option under More and copy the link.
<i>Phone</i>	Enter the telephone number of the staff member.
<i>Ext</i>	Enter the telephone extension of the staff member.
<i>Email</i>	Enter the Email address of the staff member.
<i>Job Title</i>	Enter the Job Title of the staff member.
<i>Dept</i>	Enter the name of the department to which the staff member is associated.
<i>Location</i>	Enter the name of the site or location to which the staff member is associated.
<i>Room</i>	Enter the room number to which the staff member is associated.
<i>URL</i>	Enter the URL for the staff member's section.
<i>Active</i>	Enter TRUE to flag the staff record as active. Enter FALSE to flag the staff record as inactive.

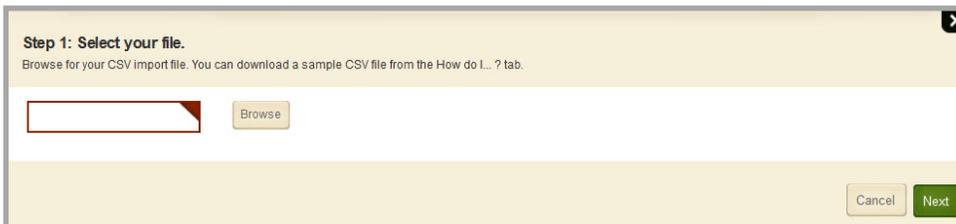
Import Staff Records

Here's how you import staff records.

1. In *Site Manager*, navigate to the page containing the app to which you wish to import staff records.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. Click on the app that you wish to edit. The Edit window displays.



4. Click **Import**. The Import wizard launches and displays *Step 1: Select your file*.
5. Click **Browse** and locate your Staff Directory App import CSV file.



- Click **Next**. *Step 2: Match field mappings* of the Import wizard displays. Map each field that you wish to include in the import by clicking the Ignore drop-down and match the field to the column name within the CSV file.

Step 2: Match field mappings

Match the app fields to the fields from your CSV file using the dropdown boxes. [MORE](#)

* Indicates a required field

APP FIELD	MAP TO CSV FILE FIELD
System ID If you exported your data from this app and you're importing updates, you'll need to map the System ID to avoid duplicating records. If you are importing new records just ignore the System ID mapping completely.	-Ignore-
Last Name *	Last Name
First Name *	First Name
Full Name	Full Name
Phone	Phone
Ext	Ext
Email	Email
Dept	Dept
Site	Site
Room	Room
Active	Active

Cancel Back Next

- Click **Next**. *Step 3: Review your Import* of the Import Wizard displays. Here you review your import data and ensure that you mapped the import CSV file correctly.

Note the *Action* column which indicates if the staff record is a *New* one or if the staff record is an *Update*. Note also the *Exception* column. The wizard checks your records for irregularities and displays what it finds, one exception per record at a time in this column. Note that if you run the import, records with exceptions are not imported. An example exception you may see is *Active must be TRUE or FALSE*.

8. Click **Import**. Staff records are imported and you are returned to the app in Edit mode.

Step 3: Review your Import ✕

Review your import data and note any exceptions.

LAST NAME	FIRST NAME	FULL NAME	PHONE	EXT	EMAIL	DEPT	SITE	ROOM	ACTIVE	ACTION	EXCEPTIONS
Jones	Jason	Jason Jones	814-555-1212	1002	jjones@hvdsd.org	Science	HVHS	150	TRUE	New	
Jones	Rick	Rick Jones	814-555-1212	1003	rjones@hvdsd.org	Science	HVHS	150	TRUE	New	
Rogers	Jessica	Jessica Rogers	814-555-1212	1004	jnrorgers@hvdsd.org	Science	HVHS	150	TRUE	New	
Waite	Aiden	Aiden Waite	814-555-1212	1005	await@hvdsd.org	History	HVHS	210	TRUE	New	
Smith	Anne	Anne Smith	814-555-1212	1006	asmith@hvdsd.org	English	HVHS	300	TRUE	New	
DiSirona	Cathy	Cathy DiSirona	814-555-1212	1007	cdisirona@hvdsd.org	Languages	HVHS	450	TRUE	New	
Klein	Kelly	Kelly Klein	814-555-1212	1008	esparks@hvdsd.org	Languages	HVHS	300	TRUE	New	
Klein	Krista	Krista Klein	814-555-1212	1009	kklein@hvdsd.org	English	HVHS	300	TRUE	New	
Klein	Melvin	Alvin Klein	814-555-1212	1010	aklein@hvdsd.org	History	HVHS	210	TRUE	New	
Jones	Amanda	Amanda Jones	814-555-1212	1011	ajones@hvdsd.org	English	HVHS	300	TRUE	New	
King	Sam	Sam King	814-555-1212	1012	sking@hvdsd.org	History	HVHS	210	TRUE	New	

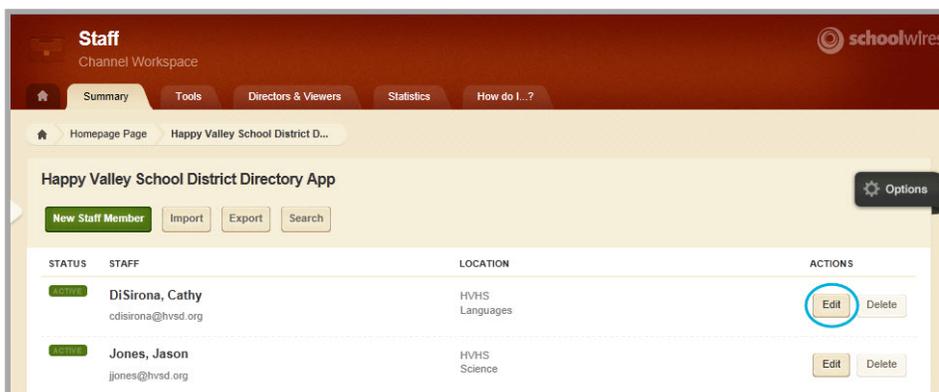
Update Staff Records

Use **Import** to update existing staff records in your Staff Directory App. Follow the same steps as you would to import new staff records with one exception—when preparing the CSV file, you must include a column for the *System ID* and then include the System ID value assigned to each staff member whose record you wish to update. We recommend that you **Export** your Staff Directory App records, modify the CSV file that the export creates and then **Import** that file to update the staff records. The System ID is included in the export CSV file.

Edit a Staff Record

Here's how you edit a staff record.

1. In *Site Manager*, navigate to the page containing the app you wish to edit.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. Click on the app that you wish to edit. The Edit window displays. Note that when you position the cursor on the app, the background color changes and a pencil displays.
4. Click **Edit** to the right of the staff member you wish to modify. The Edit Staff Member dialog displays.

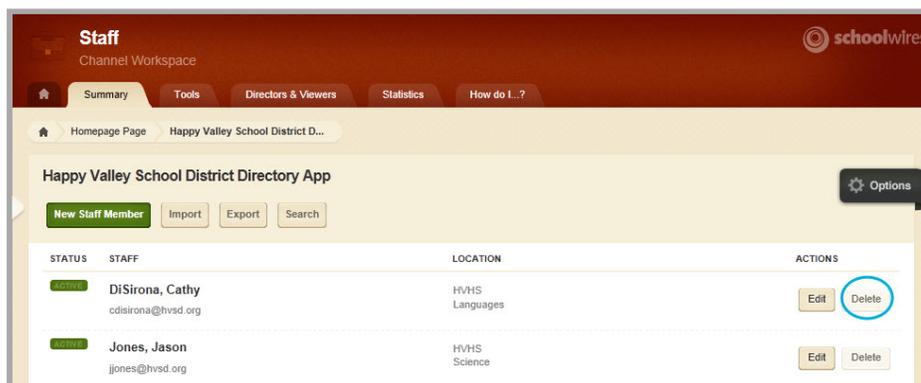


5. Make modifications to your staff record.
6. Click **Save**. You are returned to the app in Edit mode.

Delete a Staff Record

Here's how you delete a staff record.

1. In *Site Manager*, navigate to the page containing the app from which you wish to delete a staff record.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. Click on the app that you wish to edit. The Edit window displays. Note that when you position the cursor on the app, the background color changes and a pencil displays.
4. Click **Delete** to the right of the staff record you wish to permanently remove.
5. Click **Yes** on the Confirmation dialog. You are returned to the app in Edit mode.



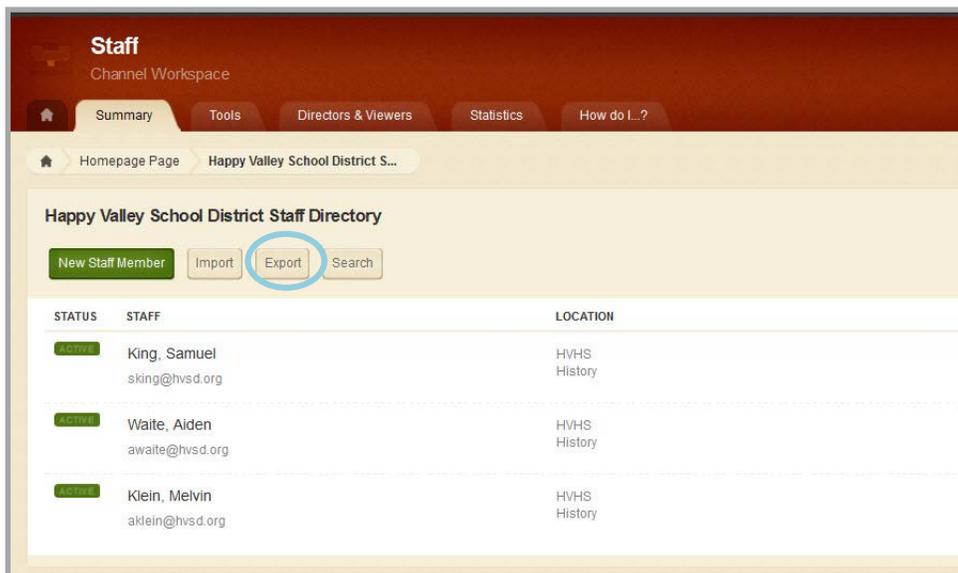
Export Staff Records

Use **Export** to create a CSV file that contains all the staff records from your Staff Directory App. Each line in the file contains all data for a staff record including the System ID assigned to it. The CSV file created when you export is named the same as the Staff Directory App you exported. For example, if your app is name Happy Valley Staff Directory, *HappyValleyStaffDistrict.csv* is the name of the file created.

The fields included in the export file are: *System ID, Last Name, First Name, Full Name, Phone, Ext, Email, Dept, Site, Room , Job Title, Image, URL* and *Active*.

Here's how you export staff records.

1. In *Site Manager*, navigate to the page containing the app to which you wish to export staff records.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. Click on the app that you wish to edit. The Edit window displays.

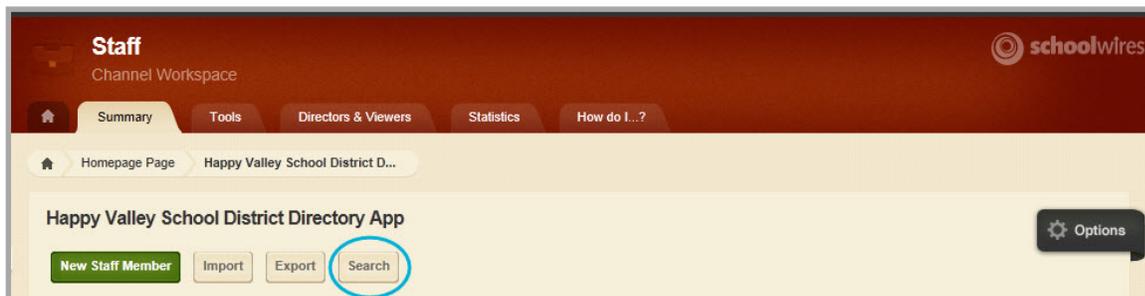


4. Click **Export**.
5. You can choose to **Open** or **Save** the export file.

Again, we recommend that you use **Export** to create your import CSV file to use when running an update import. Make changes to staff records in the file and then **Import** it. Be sure to map System ID, all the required fields and any fields that you wish to modify.

Search Staff Directory Records

Use **Search** to filter the display of staff within your Staff Directory App.



Here's how you search and filter the list of staff that displays in the Staff Directory App Edit window.

1. In *Site Manager*, navigate to the page containing the app you wish to search.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.
3. Click on the app that you wish to search. The Edit window displays.
4. Click **Search**. The Search for Staff Members dialog displays.

A screenshot of the 'Search for Staff Members' dialog box. It has a title bar with a close button (X). The dialog contains several input fields: 'Name:', 'Job Title:', 'Email:', 'Department:' (with a drop-down arrow), 'Location:' (with a drop-down arrow), and 'Room:'. At the bottom are 'Search' and 'Cancel' buttons.

5. You can filter the list by Name, Email, Department, Location and Room.
 - Enter all or part of a staff member first or last name in Name.
 - Enter all or part of a staff member job title in Job Title.
 - Enter all or part of an Email address in Email.
 - Click on the Department drop-down and select a department from the list.
 - Click on the Location drop-down and select a location from the list
 - Enter all or part of a room number in Room.

- Click **Search**. You are returned to the Edit window which now displays only those staff members matching your search criteria.

The screenshot shows the 'Happy Valley School District Staff Directory' interface. At the top, there are navigation tabs: Summary, Tools, Directors & Viewers, Statistics, and How do I...?. Below these are breadcrumb links: Homepage Page > Happy Valley School District S... The main title is 'Happy Valley School District Staff Directory'. There are buttons for 'New Staff Member', 'Import', 'Export', and 'Search'. A blue banner at the top of the table area says 'Your list of records is currently being filtered.' and contains a 'Remove Filter' button with a close icon (X), which is circled in blue. The table below has columns for STATUS, STAFF, LOCATION, and ACTIONS. The table contains 12 rows of staff data, each with an 'Edit' and 'Delete' button in the Actions column.

STATUS	STAFF	LOCATION	ACTIONS
ACTIVE	Smith, Anne asmith@hvsd.org	HVHS English	Edit Delete
ACTIVE	Sparks, Eric esparks@hvsd.org	HVHS Science	Edit Delete
ACTIVE	Tanner, James	HVHS	Edit Delete
ACTIVE	Waite, Aiden await@hvsd.org	HVHS History	Edit Delete
ACTIVE	Klein, Kelly esparks@hvsd.org	HVHS Languages	Edit Delete
ACTIVE	Lemont, Scott	HVHS	Edit Delete
ACTIVE	Lowe, Georgette	HVHS	Edit Delete
ACTIVE	Klein, Krista kklein@hvsd.org	HVHS English	Edit Delete
ACTIVE	Klein, Melvin aklein@hvsd.org	HVHS History	Edit Delete
ACTIVE	White, Donna	HVHS	Edit Delete
ACTIVE	York, Randy	HVHS	Edit Delete
ACTIVE	White, Tim	HVHS	Edit Delete

At the bottom left of the table, there is a pagination control showing '< 1 2'.

- Click **Remove Filter** to clear the search results and display all staff.

Set App Options

Schoolwires allows you to modify the default options for an app that you create. Options for the Staff Directory App grouped on two tabs, **General** and **Sharing**.

App Name:
Happy Valley School District Directory

General Sharing

If you want, you can enter a description of your app.

Description:
A list of each site within the Happy Valley School District as well as other related school information.

Show the app name on my page.

Display Settings:
By default all active app records will display on the page. If you want, you can limit the number of records that display.

Display all active app records

Display a specific number of active app records

Record Limit:
5

Save Cancel

Here's how you set options for a Staff Directory App.

1. In *Site Manager*, navigate to the page containing the app you wish to edit.
2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit mode.

Staff
Channel Workspace

Summary Tools Directors & Viewers Statistics How do I...?

Homepage Page Happy Valley School District S...

Happy Valley School District Staff Directory

New Staff Member Import Export Search

STATUS	STAFF	LOCATION	ACTIONS
Active	King, Samuel sking@hvvsd.org	HVHS History	Edit Delete
Active	Waite, Aiden awaite@hvvsd.org	HVHS History	Edit Delete
Active	Klein, Melvin aklein@hvvsd.org	HVHS History	Edit Delete

Options

3. Click **Options**. The App Options dialog displays.
4. Make changes on each of the tabs, **General** and **Sharing**.
5. Click **Save**. You are returned to the app in Edit mode.

General Tab Options

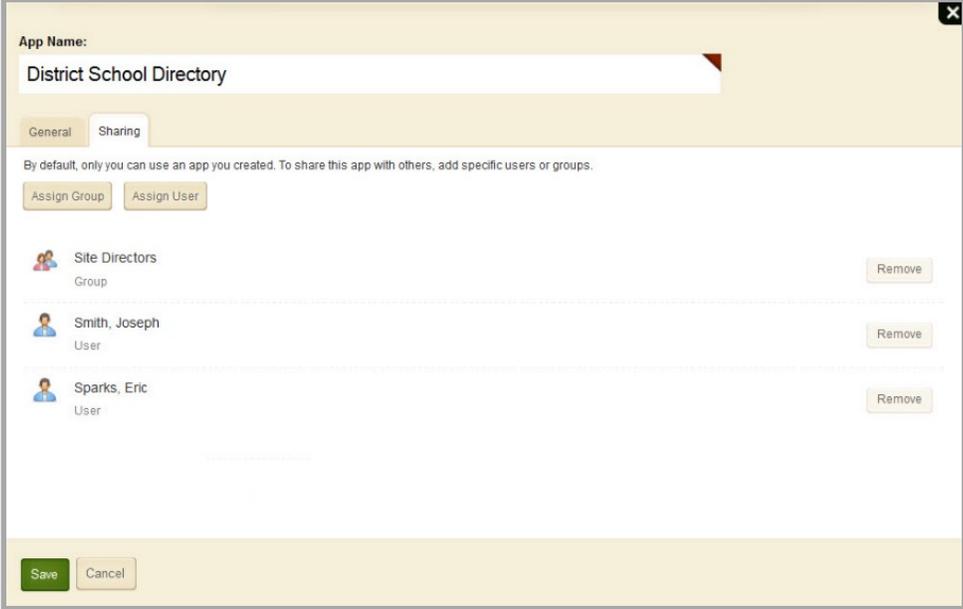
Use the **General** tab options to change the name of your app as well as add or modify a description for your app. You may choose to activate the *Show the app name on my page* check box for the app so that the App Name displays as a title for the app on the end-user website.

If you click the *Display a specific number of active app records* radio button, a Record Limit field displays. Here you indicate the number of staff members to display on the page. If there are additional staff members in the app, a **more** link displays on your end-user website. Visitors must click the **more** link to view all the staff records in the app.

Sharing Tab Options

By default, only you have access to an app that you create. If you would like other editors to be able to place your app on their pages, you must share it with them.

On the **Sharing** tab, click **Assign Group** or **Assign User** and search for and select specific users and groups with whom you would like to share your app.



The screenshot shows the 'Sharing' tab of the 'District School Directory' app configuration. The 'App Name' field is set to 'District School Directory'. Below the tabs, there is a note: 'By default, only you can use an app you created. To share this app with others, add specific users or groups.' There are two buttons: 'Assign Group' and 'Assign User'. Below these, three items are listed with 'Remove' buttons:

- Site Directors (Group)
- Smith, Joseph (User)
- Sparks, Eric (User)

At the bottom, there are 'Save' and 'Cancel' buttons.

Staff Directory App Practices

Here are some practices you should consider when working with the Staff Directory App.

- Place the app in a single column location, such as a one-column page or a homepage with a region that spans across the page, such as a channel homepage. Do not add the app to a multiple column page or to a homepage whose regions share the page width.
- To identify the app on your end-user website page, edit the app options and activate the *Show the app name on my page* check box. Be sure to enter a meaningful name for your app within the App Name field.
- If you have a large number of staff members displaying on the end-user website, use search to find your staff member of interest.



Happy Valley School District ▸ Staff ▸ Homepage

Name:

Email:

Department:

Location:

Room:

You can search by name, email, department, location and room. Enter partial or complete values in the name, email and room fields or make a drop-down list selection for department or location and click **Search**.

- Be careful to not create duplicate staff records! When you import a CSV file and the import does not include a mapped System ID column, the app assumes that the file contents are new records and it creates them, even if the those records already exists.