Working with Templates



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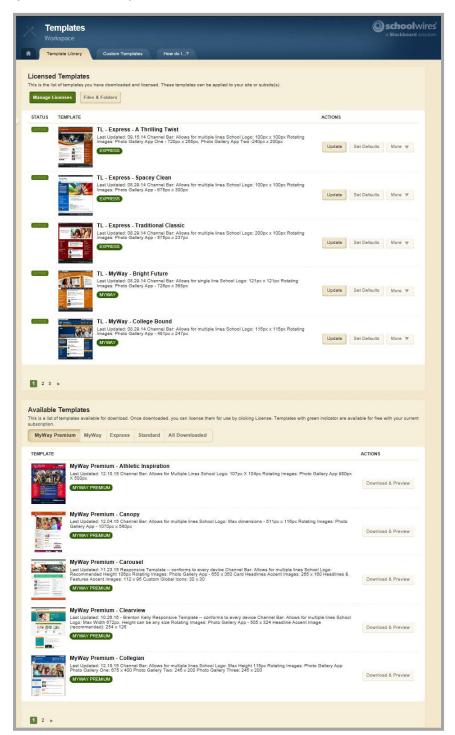
Introduction

Templates control the look and feel of your end-user website. If you have a Passport with the extended privilege to manage templates, you can access the Templates Workspace in *Site Manager*. Here you find tabs to access the **Template Library** and **Custom Templates**.

On the **Template Library** tab you see *Licensed Templates* and Available Templates. **Licensed Templates lists** templates you have downloaded and licensed for use on your website. Available Templates lists all the templates available for you to download and license. You can choose from MyWay Premium, MyWay, Express and Standard templates. By default, you have a Standard Subscription, which means you can download and license all templates on the Standard tab. The remaining templates you see are available on a by subscription or by individual license basis.

On the **Custom Templates** tab you find all of your non-subscription templates, if you have any. These are templates other than those you download from the Template Library, for example, a custom built template created for you by Blackboard. You can use Styler™ to edit these templates.

This guide shows you how to download, license and manage your Template Library and Custom templates.



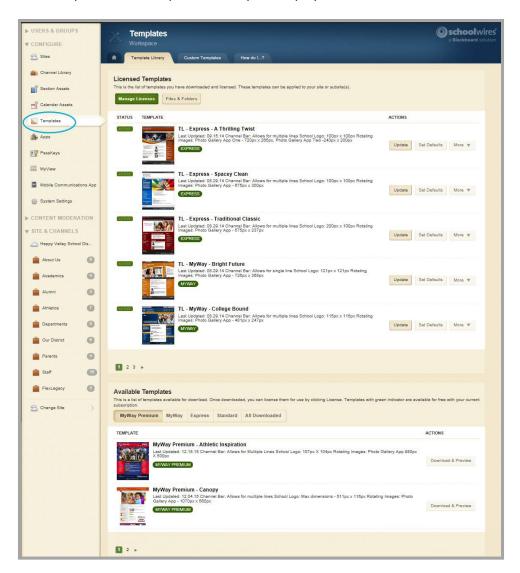
The Templates Workspace

You use the Templates Workspace, specifically the **Template Library** tab, to download and preview any templates that are available for licensing. Once you download, preview and license a template, you can apply it to your sites.

In this workspace you can set template defaults and sharing rights for a template as well as delete licensed subscription templates from Licensed Templates and remove templates from Available Templates. You can also access the Template Workspace **Files & Folders** where you upload images for school logos and global icons. You use these images when you configure templates with options for School Logo and Global Icons.

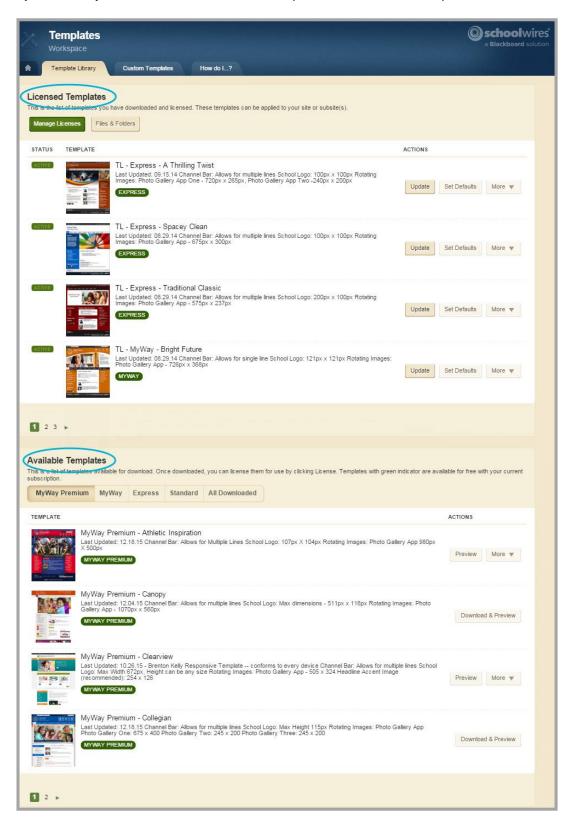
Here's how you access the Templates Workspace.

- 1. In *Site Manager*, expand CONFIGURE in the Content Browser.
- 2. Click Templates. The Templates Workspace displays.



The Template Library Tab

The **Template Library** tab is divided into *Licensed Templates* and *Available Templates*.



Available Templates

In Available Templates, you see lists of templates that are available for you to download. Click one of the tabs and choose from MyWay Premium, MyWay, Express and Standard templates. By default, you have a Standard Subscription, which means you can download and license all templates on the Standard tab. Click the All Downloaded tab to see a list of the templates you have downloaded for review.



Download and Preview a Template

Here's how you download and preview a template.

1. In Available Templates, locate the template you wish to download.

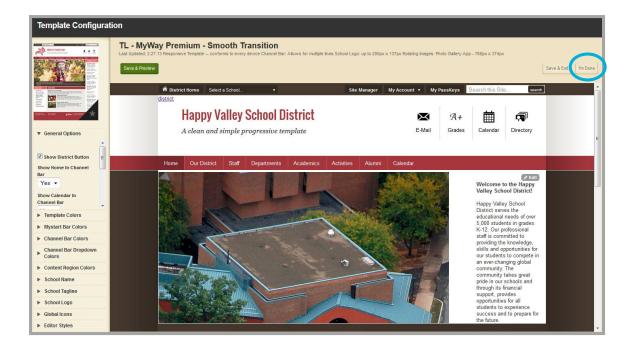




Note that a green indicator flags templates that fall within your subscription level. Templates flagged with a gold indicator are ones that are outside of your subscription level and require an individual template license.

Regardless of your subscription level, you can download and preview any of the available templates. However, you must have an Individual template license for each template you wish to license that is outside of your subscription level.

- 2. Click **Download & Preview**. The button label changes to **Working...** indicating that the download is in progress.
- 3. When the download is complete, the template displays within the Template Configuration window. The preview you see pulls content from your District Site and displays it in real time within the window.



Configure the template in the preview window using the Configuration Browser located at the left of the window.

- 4. Click **Save & Preview** to see the changes in the Preview window.
- 5. Click **Save & Exit** to retain your changes and exit the Template Configuration window. A confirmation dialog displays asking you if you are sure. Note that changes you make become default values for the template.
- 6. Click **I'm Done** to exit the Template Configuration window without saving your changes. A confirmation dialog displays asking you if you are sure.

Always click the I'm Done button to exit the Template Configuration window.

Preview a Downloaded Template

After the initial download and preview of a template, click **Preview** to display it again in the Template Configuration window.



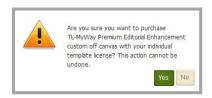
License a Template

Here's how you license a template that you have downloaded and previewed.

1. In Available Templates, click **More**.



- 2. Select License from the drop-down list.
 - If the template is included with your subscription, it moves to Licensed Templates and is removed from Available Templates.
 - If the template is not included with your subscription, but you have an individual template license, a dialog displays asking you if you are sure that you want to purchase the template.



3. Click Yes. The template moves from Available Templates to Licensed Templates.

Remember, once you license a template using an Individual template license, you <u>cannot</u> undo it. If you license a template by mistake, contact Blackboard Support.

If the template you are trying to license is not part of your subscription and you have no Individual template license, you are provided with information on how to obtain one.

Remove a Template

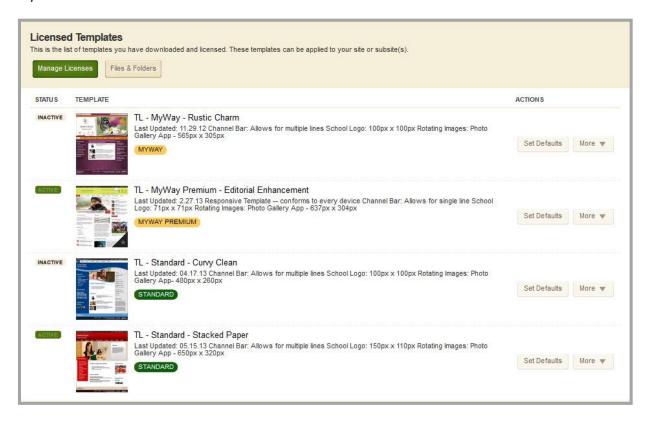
Here's how you remove a template you have downloaded and previewed.

- 1. In Available Templates, click **More**.
- 2. Select *Remove* from the drop-down list. A dialog displays asking if you are sure. Note that you can **Download & Preview** the template again.

Note that if you download and preview a template and change and save its settings, you must remove the template and download and preview it again in order to restore the original template settings.

Licensed Templates

In *Licensed Templates*, you see a list of templates you licensed for use. These templates can be applied to your sites.



Status

When you initially license a template, its status is INACTIVE. Click on ACTIVE or INACTIVE to toggle the template status. You can only apply an ACTIVE template to your site.

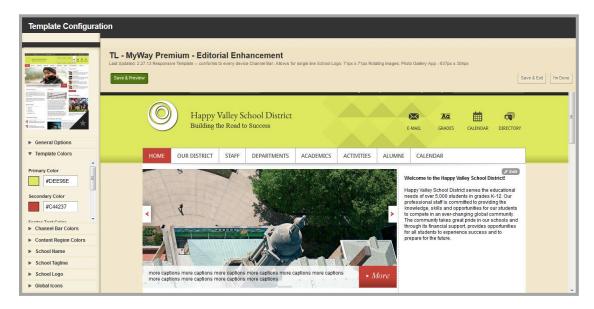
Set Defaults

Templates contain configurable options. Click **Set Defaults** to change the original default values.

For example, your template has the default option setting to show the **District Home** button. For any site using this template, the District Home button displays. You decide that you never want it to display when it is applied to any of your sites. You would click **Set Defaults** to launch the Template Configuration window and uncheck the *Show District* check box. Then click **Save & Exit** to retain your modifications and exit the Template Configuration window.



To learn more about General Options and the Template Configuration window, read the *Template Configuration Guide*.



Update

An **Update** button displays when revisions for a template are available. Click **Update**. The button label changes to **Working...** indicating that updates are being applied. When complete, the button disappears and you have the current version of the template.



Note that these updates only apply to template code. There are no modifications made to your content or the appearance of your end-user website.

More—Sharing Rights

By default all Site Directors and Subsite Directors can apply all templates to their sites. You can set Sharing Rights for a template and limit which users and groups can apply it.



Add Sharing Rights

Here's how you add sharing rights for individuals to a licensed template.

1. In Licensed Templates, click **More** and from the drop-down list select Sharing Rights. The **Sharing Rights** dialog displays.



- 2. Click Assign User and in the Search box enter all or part of a user's first, last or user name.
- 3. Click Search. Matching records display.
- 4. Click **Select** to move a user to the Selected Users list.
- 5. Click Add when you have finished selecting users. The Sharing Rights tab displays.
- 6. Click I'm Done.

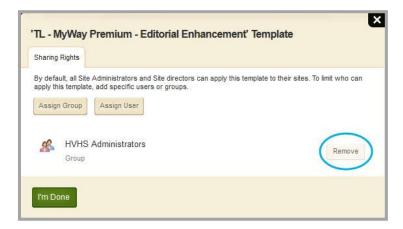
Here's how you apply sharing rights for a group to a licensed template.

- 1. In Licensed Templates, click **More** and from the drop-down list select Sharing Rights. The **Sharing Rights** dialog displays.
- 2. Click **Assign Group** and in the Search box enter all or part of a group name. Note that you can display a list of groups by category if you select a category from the drop-down list.
- 3. Click **Search**. Matching records display.
- 4. Click **Select** to move a group to the Selected Groups list.
- 5. Click **Add** when you have finished selecting groups. The **Sharing Rights** tab displays.
- 6. Click I'm Done.

Remove Sharing Rights

Here's how you remove sharing rights applied to a licensed template.

1. In Licensed Templates, click **More** and from the drop-down list select Sharing Rights. The **Sharing Rights** tab displays.



- 2. Click **Remove**. A dialog displays asking if you are sure.
- 3. Click Yes. The Sharing Rights tab displays.
- 4. Click I'm Done.

More—Delete

Here's how you delete a template from the Licensed Templates list. Note that you can only delete templates that are associated with your subscription level. You cannot delete templates that you have individually licensed.

- 1. In Licensed Templates, click **More** and from the drop-down list select Delete. A confirmation dialog displays asking you if you are sure.
- 2. Click **Yes**. The template is removed from Downloaded Templates and reappears in Available Templates.

Note that you cannot delete a template in use by a site. If you try, you receive a warning message.

Manage Licenses

You use **Manage Licenses** to license templates available with your subscription or an individual template license. You can only license downloaded templates.



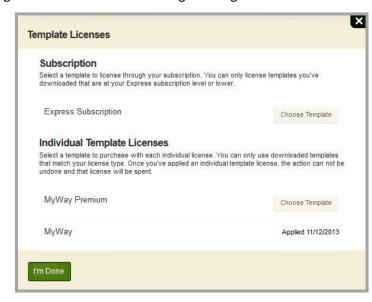
Note again that once you license a template using an individual template license, you <u>cannot</u> undo it. If you license a template by mistake, contact Blackboard Support.

Here's how you use Manage Licenses to license a template through your subscription.

- 1. In License Templates, click **Manage Licenses**. The Template Licenses dialog displays.
- 2. Click **Choose Template** under Subscription. The Templates dialog displays.
- 3. Click a template image on the dialog. The border around the image turns green.
- 4. Click **Choose**. The Template Licenses dialog displays.
- 5. Click **I'm Done**. The template displays in Licensed Templates.

Here's how you use **Manage Licenses** to license a template using an individual template license.

- In License Templates, click
 Manage Licenses. The Template
 Licenses dialog displays.
- Click Choose Template under Individual Template Licenses. The Templates dialog displays.
- Click a template image on the dialog. The border around the image turns green.



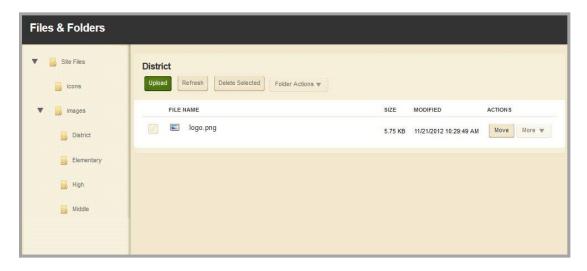
- 4. Click **Choose**. A confirmation dialog displays asking you if you are sure.
- 5. Click **Yes**. The Template Licenses dialog display. Note that the date that the individual template license was applied displays.
- 6. Click I'm Done. The template displays in Licensed Templates.

Files & Folders

Click **Files & Folders** to upload custom Global Icon or School Logo images for your templates. Here, Files & Folders is associated with the entire Templates Workspace so you access the same Files & Folders by clicking **Files & Folders** on the **Template Library** tab or the **Custom Templates** tab. You can also upload any files related to your templates.



Upload custom Global Icon images to the *icons* folder. For School Logo images, upload images to the *images* folder or any subfolders you may have created below it. For best results, images should be in PNG format.

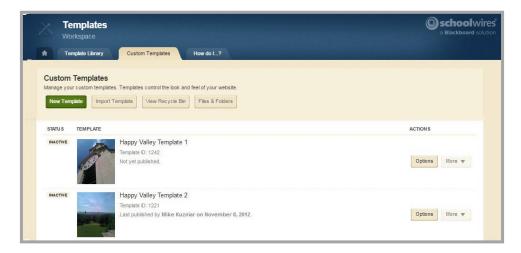


Once uploaded, you can choose from these custom images as well as default image sets when you are configuring a template with School Logo and Global Icon options.

For additional information about setting Global Icons and School Logo elements, read the *Template Configuration* Guide.

Custom Templates

If you have any custom templates, you will find them on the **Custom Templates** tab. Here you can create new templates, edit templates, import templates, access the Custom Templates Recycle Bin, access **Files & Folders** and manage your custom templates.



Create New Template

We recommend that you do not attempt to create or edit a custom template unless you have attended <u>Advanced Styler Training</u>. As templates control the look, feel and behavior of a site, you could render your end-user website unusable with an improperly coded template.

Here's how you create a custom template.

- 1. Click **Custom Templates**.
- 2. Click **New Template**. The New Template dialog displays.
- 3. Enter a name for the template and an optional description.
- 4. Click **Save**. The **Custom Template** tab displays.
- 5. Click on the name of the template to edit it.
- 6. Click **Save** to retain your changes. Click **Save & Publish** to retain your changes and push them to the template.
- 7. Close the window by clicking **8** in the window title bar.

Import Template

Here's how you import a template. The import file has a .zip file extension.

- 1. Click **Custom Templates**.
- 2. Click Import Template. An upload dialog displays.
- 3. Locate and select your import file.
- 4. Click **Open**. The **Import Template** button displays the label **Working**... and returns to **Import Template** text when the import is complete.

View Recycle Bin

When you remove a template from the **Custom Templates** tab, it is placed into the Recycle Bin. To access the Recycle Bin, click **View Recycle Bin**.



Click **Restore** to return the template to the **Custom Templates** tab. Click **Delete** to permanently remove the template. For both **Restore** and **Delete**, you are asked if you are sure.

Files & Folders

Click **Files & Folders** to upload files associated with your templates. Note that Files & Folders is associated with the entire Templates Workspace so you access the same Files & Folders by clicking **Files & Folders** on the **Template Library** tab or the **Custom Templates** tab.



Options—General Tab

For each template, you see an **Options** button. Clicking **Options** places you on the **General** tab where you edit the name and the description of the template. Click **Select an Image** to upload a Preview Image that serves as a thumbnail for the template on the **Custom Template** tab. You also see this image in the Template Configuration window when selecting a template to apply to a site.

Once uploaded, you see the name of the Preview Image file and the \otimes symbol to the right of its name. Click the \otimes to remove the image. Note that the image is deleted without a confirmation message.



Options—Sharing Rights Tab

By default, all Site Administrators and Site Directors can apply templates to their sites. You can set Sharing Rights for a template so that only the users and groups of users you specify may apply the template to a site.

Add Sharing Rights

Here's how you apply sharing rights for individuals to a custom template.

- 1. Click Custom Templates.
- 2. Click Options and click Sharing Rights.
- 3. Click **Assign User** and in the Search box, enter all or part of a user's first, last or user name.
- 4. Click **Search**. Matching records display.
- 5. Click **Select** to move a user to the Selected Users list.
- 6. Click **Add** when you have finished selecting users. The **Sharing Rights** tab displays.
- 7. Click Save.

Here's how you apply sharing rights for a group to a custom template.

- 1. Click **Custom Templates**.
- 2. Click **Options** and click **Sharing Rights**.
- 3. Click **Assign Group** and in the Search box, enter all or part of a group name. Note that you may display a list of groups by category if you select a category from the drop-down list.
- 4. Click **Search**. Matching records display.
- 5. Click **Select** to move a group to the Selected Groups list.
- 6. Click **Add** when you have finished selecting groups. The **Sharing Rights** tab displays.
- 7. Click Save.

Remove Sharing Rights

Here's how you remove sharing rights applied to a custom template.

- 1. Click **Custom Templates**
- 2. Click **Options** and click **Sharing Rights**.
- 3. Click **Remove**. A dialog displays asking if you are sure.
- 4. Click Yes. The Sharing Rights tab displays.
- 5. Click **Save**.

More Actions

When you click **More** you see a drop-down list with the actions Copy, Publish, Export, Releases and Remove.



Copy

Before making changes to a custom template, you might want to make a copy of the template and then modify the copy.

Here's how you copy a template.

- 1. Click Custom Templates.
- 2. Click **More** and select Copy from the drop-down list. A dialog displays asking if you are sure.
- 3. Click **Yes**. The **Custom Templates** tab displays.

Note that – *copy* is appended to the name of the template.

Publish

When you make changes to a template, you must publish it before you can apply it to a website.

Here's how you publish a template.

- 1. Click Custom Templates.
- 2. Click **More** and select Publish from the drop-down list. A dialog displays asking if you are sure.
- 3. Click Yes. The Custom Templates tab displays.

Export

You may want to save a copy of a template. To do this you export it.

Here's how you export a template.

- 1. Click **Custom Templates**.
- 2. Click More and select Export from the drop-down list.
- 3. Save the file.

Note that the file is named the same as the template name with a .zip extension.

Releases

You may wish to restore a template to a previous release or delete a release version. Schoolwires retains copies of the current template and the last ten releases. Each time you publish a template a release is created.



Click **Restore** or **Delete**. For both options, you are asked if you are sure.

Remove

If you are no longer using a custom template, you might want to remove it.

Here's how you remove a template.

- 1. Click Custom Templates.
- 2. Click **More**. A dialog displays asking if you are sure.
- 3. Click **Yes**. The template is moved to the Recycle Bin.

Note that you cannot remove a template that is in use by a site. If you try you receive a warning message.

Working with Files & Folders within the Template Workspace

If a template you configure has an option to select a School Logo, you can create folders and upload your own custom School Logo images to those folders using **Files & Folders** in the Templates Workspace. Once you have uploaded your School Logo images, you see them in and select them from the Choose Image dialog in the Template Configuration window.



If a template you configure has an option to select Global Icons, you can upload your own custom Global Icon images to the *icons* folder using **Files & Folders** in the Templates workspace. Once you have uploaded your Global Icon images, you see them in and select them from the Custom category of the Choose Image dialog in the Template Configuration window.

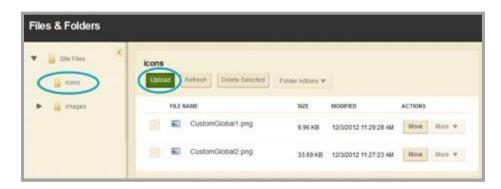
Custom Global Icons and School Logo images should be in PNG format.

To learn more about General Options and the Template Configuration window, read the *Template Configuration Guide*.

Global Icon Images and Files & Folders

Here's how you add custom Global Icon images.

- 1. Click **Files & Folders** on the **Template Library** or the **Custom Templates** tab in the Template Workspace. Files & Folders displays.
- 2. Expand Site Files in the Navigation Pane by clicking the arrow.



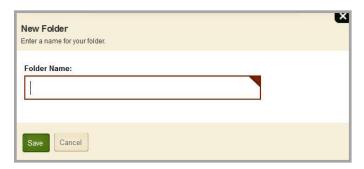
- 3. Click on the *icons* folder in the Navigation Pane to select it.
- 4. Click **Upload** and complete the Upload Files dialog.

School Logo Images and Files & Folders

Before you can upload images for School Logo, you must create at least one subfolder in Files & Folders of the Templates workspace. Create the subfolder within the *images* folder. Each subfolder you create within the *images* folder is seen as a category in the School Logo Choose Image dialog in the Template Configuration window.

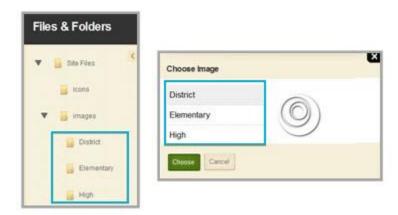
Here's how you create a subfolder to the images folder in Templates workspace Files & Folders.

- 1. Click **Files & Folders** on the **Template Library** or the **Custom Templates** tab in the Template Workspace. Files & Folders displays.
- 2. Expand Site Files in the Navigation Pane by clicking the arrow.
- 3. Click on the images folder to select it.
- 4. Click **Folder Actions** and select New Subfolder. The New Folder dialog displays.
- 5. Enter a name for your folder and click **Save**.



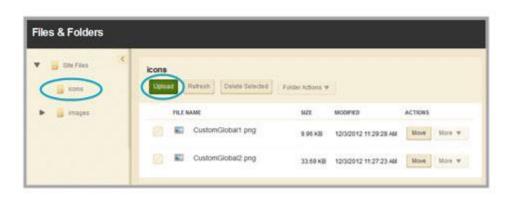
6. The subfolder is created and you are returned to Files & Folders.

Remember that each subfolder you create as a child to the *images* folder becomes a category you see in the School Logo Choose Image dialog of the Template Configuration window. Here you see *District*, *Elementary* and *High* as subfolders to the *images* folder in Files & Folders and as categories in the School Logo Choose Image dialog.



Here's how you add custom School Logo images.

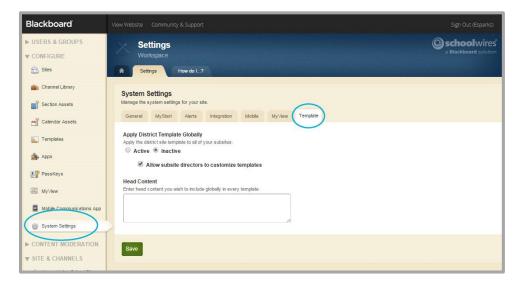
- 1. Click **Files & Folders** on the **Template Library** or the **Custom Templates** tab. Files & Folders displays.
- 2. Expand Site Files in the Navigation Pane by clicking the arrow.
- 3. Click on the images folder or a subfolder below it to select it.



4. Click **Upload** and complete the Upload Files dialog.

Settings Workspace

Within the Settings Workspace, there are two global options related to templates. You can apply the District template to all subsites and you can specify Head Content that displays for each of your templates.



Apply District Template Globally

To apply the District template to all of your subsites, select the Active radio button. The template assigned to the District Site is also applied to each subsite. If you select the Inactive radio button, different templates can be assigned to different sites.

If the *Allow subsite directors to customize templates* check box is activated, Subsite Directors can modify template General Options for sites to which they are assigned.

Here's how you apply the District template globally.

- 1. In *Site Manager*, expand CONFIGURE in the Content Browser and select System Settings. The Settings Workspace displays.
- 2. Click **Template**.
- 3. Locate the Apply District Template Globally option and click the Active radio button.
- 4. Click the Enable Subsite Template Customization check box to allow Subsite Directors to customize the District template at each subsite to which they are assigned subsite director privileges.
- 5. Click Save.

Here's how you allow different templates at different sites.

- 1. In *Site Manager*, expand CONFIGURE in the Content Browser and select System Settings. The Settings Workspace displays.
- 2. Click **Template**.
- 3. Locate the Apply District Template Globally option and click the Inactive radio button.
- 4. Click the Enable Subsite Template Customization check box to allow Subsite Directors to customize the template at each subsite to which they are assigned subsite director privileges.
- 5. Click Save.

Head Content

To add content to any template applied to a site, update the Head Content option.

Here's how you specify head content.

- 1. In *Site Manager*, expand CONFIGURE in the Content Browser and select System Settings. The Settings Workspace displays.
- 2. Click **Template**.
- 3. Locate and enter content into the Head Content field.
- 4. Click **Save**. A dialog displays asking if you are sure.

Here is an example of head content. With this code, visitors who navigate to the end-user website see the *School is Closed Today* dialog box.

