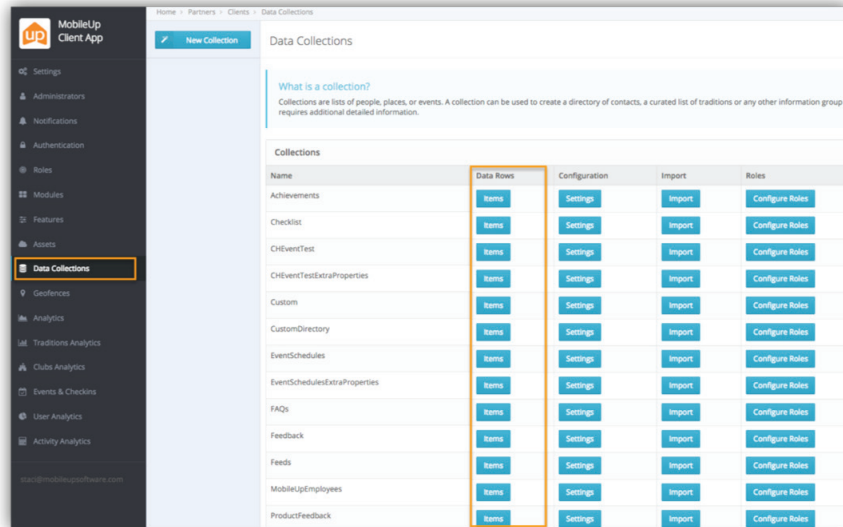


DATA COLLECTIONS

Data collections are lists of people, places, or events in the MobileUp system. Learn how to work with this data through the Items and Settings configurations.

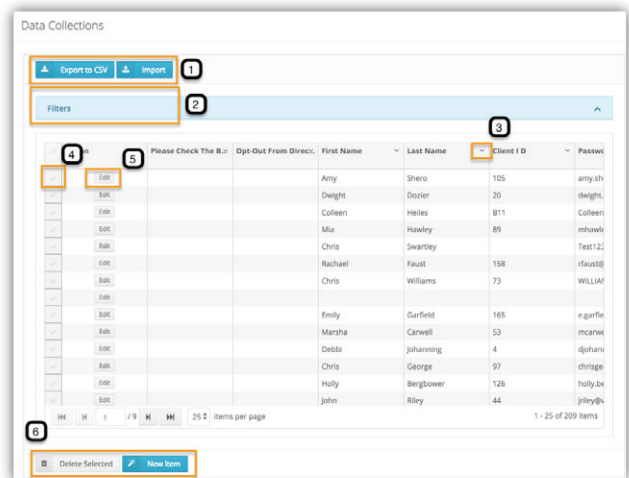
ITEMS

- 1) Begin by navigating to **Data Collections** in the left-hand menu. Click **Items** to go into a specific collection where data is stored.



- 2) Once you are in the data collection you have multiple options:

1. **Export to CSV** (exports all data in the collection) or **Import** (see the Importing Data section for information.)
2. **Filters** allows you to locate data by any column header value.
3. **Sort Options:** Ascending, Descending, Hide Column, Pin Left or Pin Right.
4. **Select** a record.
5. **Edit** a record.
6. **Delete Selected** or add a **New Item**.



! Please use caution when modifying settings in a data collection.

EDITING RECORDS

1) Click the **Edit** button on a row to view that record's details.

Tip: Use the membership data collection to troubleshoot login issues! Use the filters to find the member record and click **Edit** to view all information on the record. You can provide the user with the required login information (email, ID, password etc.) or you can edit it if it has changed.

The screenshot shows a form for editing a user record. The fields are as follows:

- Last Name:** Test
- Client ID:** 10
- Password:** Test123!
- Role Override:** Students,NotificaitonAdmin
- EssenzaUniqueld:** c0f9b226-19b2-484c-9072-20bd95462af8
- ORGANIZATION:**
 - Organization Name:** (empty)
 - Position:** Testing field
 - Product Type:** (empty)
- CONTACT INFORMATION:**
 - Phone Number:** 9135556667
 - Email:** test1@test.com

2) Remember to **Save**. This will return you to the data collection.

SETTINGS

- 1) Each Column Header in your data is displayed and created as a field in the Settings section of the data collection.
- 2) Fields can be grouped by category.
- 3) You can **Add a Field** to an existing grouping or **Create a New Grouping**. You can also **Remove** fields from the data collection.
- 4) The order in which fields are displayed can be sorted using the **Sort Groupings** feature.

Students Collection Settings

Sort Groupings

Create a New Grouping

CLIENT DIRECTORY OPT-IN

Advanced	Show In Grid	Column Name	Column Field Type	Form Label	Form Field Type	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	OptInDirectory	bool	Please check the box to r	checkbox	Remove
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DirectoryHidden	bool	Opt-Out from Directory	checkbox	Remove

Add a Field

FIELD NAME

- 1) Each data field has a **Column Name** and **Form Label**.
 - **Column Name:** It cannot contain spaces or special characters. This name will appear as a column header in the data import unless an import name is specified.
 - **Form Label:** This is the “friendly” name. This is the field used in the app and administrator tools as well as the header when you manually add data records to the collection.

Advanced	Show In Grid	Column Name	Column Field Type	Form Label	Form Field Type	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	firstName	string	First Name	textbox	Remove

Advanced Options

Import Name In

Enable Inline Editing

Is Key Value (Only one can be set as a key.)

Is Searchable (Indexed) **Warning: Use with caution. Consult administrator. Cannot be undone.**

Field is not part of the import.

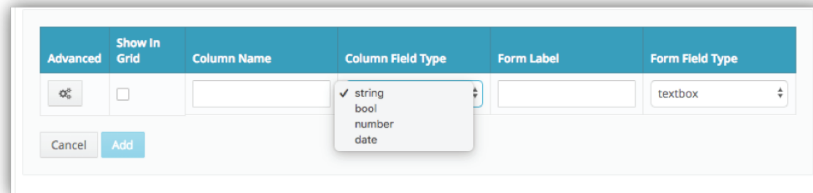
Read Only

Required

This List has Predefined Values

COLUMN FIELD TYPE

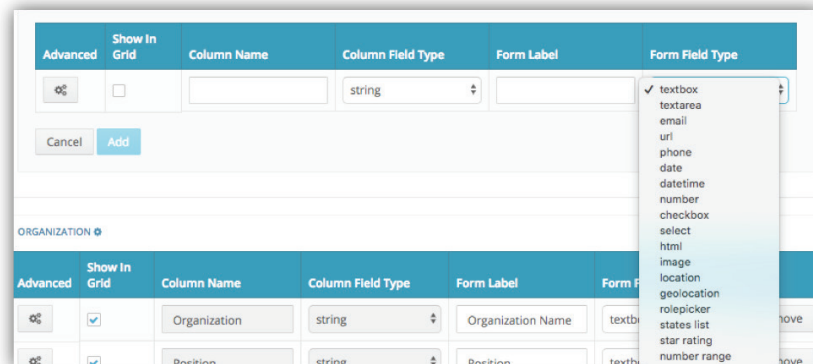
- The column field type will differ depending on the type of data.
 - String:** Use for text.
 - Bool:** Use for a check box.
 - Number and Date:** Use when applicable.



FORM FIELD TYPE

- Select the **Form Field Type** most appropriate for the type of data you will be loading.

NOTE: Selecting the correct type allows your data to function appropriately in the app. For example, a phone number in the directory will not be clickable unless it has been designated as “phone” in the field type.



ADVANCED

- Select** allows you to create a drop down or scrollable menu. To add the menu options, click **Advanced**, and select **This List has Predefined Values**.

