MyView
Administration Guide

Schoolwires® Centricity2™
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Introduction

Welcome to MyView! With MyView, registered users can view and organize information that is important to them in a single workspace on the end-user website. With MyView, they have access to a Dashboard and a Planner.

They use gadgets on their Dashboards to display their favorite content. Gadget content is automatically updated—there is no need for users to search the internet or the end-user website for new content.

There are two types of gadgets: Aggregator and Direct Feed. Aggregator gadgets collect and display content from apps on your Centricity2 site and subsites. The Aggregator gadgets are Announcements, Global Shortcuts, Lunch Menu and MiniBase Search. Direct Feed gadgets display content that is fed directly to it from another source, Schoolwires® Nimbus™ or Synergy™ for example. The Direct Feed gadgets are Nimbus Activity Feed, Nimbus Groups, Nimbus Recent Messages, Personal Shortcuts, Passkeys, Planner Events, RSS Reader, Section Membership, Synergy Comments and Synergy Favorites. Use the Synergy Direct Feed gadget Synergy File Uploader to send files to Synergy folders.
On the Planner, users can filter events from multiple workspace calendars into their Planner calendar. They can also add their own events to it. When you set up Family Relationships, parents and guardians can view the Planners of their children.
MyView Setup

Before users can access MyView, you must complete a series of configuration tasks, in various places within Site Manager.

- In Users & Groups you may create Family Relationships. If necessary, you will create groups in Users & Groups to associate with MyView and MyView Configurations. You may also assign the Passport Extended Privilege Manage MyView Configuration to any user you wish to be able to manage MyView Configurations.

- In Configure you will assign access to MyView. You will also create Configurations (which are collections of gadgets) and assign user access to these configurations. Note that you assign access to MyView and MyView Configurations by group and not by individual users. To activate MyView for your site, you will modify System Settings.

Users & Groups—Groups

You use groups to assign access to MyView and to MyView Configurations. You may use groups you have already created or if necessary, create new ones.

We highly recommend that you do not give MyView access to all users at the same time. You should devise a deployment schedule and create groups to match your deployment plan, gradually allowing additional users to have access to MyView.

Users & Groups—Users

If parents or guardians wish to see the Planners of their children, you need to set up Family Relationships. You accomplish this by either using Import Family Relationships or setting up the relationships individually.
**Import Family Relationships**

To use Import Family Relationships, create an import CSV file. You can download a sample CSV file by clicking the *Click here* link on the Import Family Relationships dialog.

The CSV file should consist of two columns. One column is the Parent Identifier. The other column is the Student Identifier. During the import, you will click a radio button to indicate if the CSV file data consists of Users Codes or User Names.

If you choose the User Codes import option, populate the CSV file columns with the User Code values for each parent and student.

If you choose the User Name import option, populate the CSV file columns with the User Name values for each parent and student.

Here’s how you import Family Relationships.

1. In *Site Manager*, expand Users & Groups in the Content Browser.
2. Click Users.
3. Click the *Import Family Relationships* tab.
4. Click *Import*.
5. Click *Browse* and locate your CSV file. Click *Open* to select the file.

6. Click *Continue*.
7. Select either the User Codes or the User Names radio button to select the User Identifier option you wish to use and then map the fields in your import file.

8. Click *Import*. Relationships are imported and the Import Family Relationships dialog displays. Here you will see options relating to each of your imports.
Click on Details or View Exceptions to see information about the import or click Rollback to undo the import.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>Indicates the number of Valid and Invalid records encountered during the import.</td>
</tr>
<tr>
<td>Rollback</td>
<td>Click to rollback the import and undo the Family Relationships that were created.</td>
</tr>
<tr>
<td>View Exceptions</td>
<td>Click to obtain a list of errors encountered during an import. Click Export to send the error list to an Excel file.</td>
</tr>
</tbody>
</table>
Individual Family Relationship Set Up
If you have just a few Family Relationships to add, you might choose to add them individually. Here’s how you add Family Relationships on an individual basis.

1. In Site Manager, expand Users & Groups in the Content Browser.
2. Click Users.
3. On the Users tab, locate and click on the name of a parent to edit the account.
4. Click the Family Relationships tab.
5. Click Add a Student.
6. Enter all or part of a student’s First, Last or User Name and click Search.
7. Locate the student in the list and click Select to move the student into Selected Users area.
8. Click Add. The Family Relationship is created.
9. Click Save. The user record is updated and you are returned to the Users tab.

Users & Groups—Assign Passport Extended Privileges
To configure MyView, a user must have a Passport that includes the Extended Privilege Manage Personal Workspace Configurations.

Here’s how you update a Passport.

1. In Site Manager, expand Users & Groups in the Content Browser.
2. Click Users.
3. Click the Passports tab.
4. Click on the name of a Passport. The Edit Passport dialog opens.
5. Click the **Extended Privileges** tab.

![Extended Privileges Tab](image)

6. Locate the **Manage MyView Configurations** privilege in the list. In the Status column, locate the **Inactive** toggle and click on it to toggle it to **Active**.

7. Click **Save**. You are returned to the **Passports** tab.

**Configure—Templates**

It is not necessary for you to make any template modifications for MyView. If you are using a custom template, note that an additional workspace, **MyView**, has been added to the template. This workspace controls how MyView displays on the end-user website.
Configure—Apps

By default, all registered users have access to all the MyView gadgets and can add them to tabs on their Dashboards. You can restrict access to a gadget by setting its Sharing Rights.

Here’s how you restrict access to a gadget.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click Apps. The Apps Workspace displays.
3. Locate the gadget to which you wish to restrict access and click Rights. The Sharing Rights dialog displays.
5. Click the Choose a Category drop-down list and select a category to display a list of groups. You can also enter a group name or part of a name in the Search field and click Search.
6. Click Select to the right of each group you wish to add to the Selected Groups list.
7. Alternatively click Assign User to assign rights to individual users. The Add User dialog displays.
8. Enter all or part of a user’s first, last or user name and click Search.
9. Click Select to the right of each user you wish to add to the Selected Users list.
10. Click Add. You are returned to the Sharing Rights dialog.
11. Click I’m Done. You are returned to the System Apps tab.

Only members of the groups or individual users you selected are able to add the gadget to their tabs.

To remove Sharing Rights for a gadget, click Rights for the gadget to display the Sharing Rights dialog and click Remove. Click Yes to the Confirmation dialog and click I’m Done.
Configure—MyView

By default all Registered Users have access to MyView. You limit access to MyView by specifying groups of users on the Viewers tab.

We highly recommend that you do not give MyView access to all users at the same time. You should devise a deployment schedule and create groups to match your deployment plan, then gradually allow MyView access by group.

Add Groups to Viewers Tab

Here’s how you assign groups to the Viewers tab. Once you assign a group, the users in that group can access MyView on the end-user website.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click MyView. The MyView Workspace displays.
3. Click the Viewers tab.
5. Enter a group name or part of a name and click Search. If you wish, you can narrow the search by choosing a group category from the Choose a Category drop-down list.
6. Click Select to the right of a group to add it to the Selected Groups area.
7. Click Add. You are returned to the Viewers tab.

To remove a group, on the Viewers tab, click Remove.
Create Configurations
All registered users have access to a default configuration. A configuration is a set of one or more gadgets. The default configuration includes the Personal Shortcuts gadget. You can create additional configurations and allow users to access the configuration by assigning groups of users on the Configuration Assign tab.

Here’s how you create a Configuration. You may create as many configurations as you like.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click MyView. The MyView Workspace displays.

4. Enter a name for the configuration. You can also add a description if you like.

5. Click Continue. The Content tab displays.
6. Click Add. The Add Content dialog displays.
7. Click on the gadgets that you wish to include in the configuration. A green box will surround each gadget you select. You may select multiple gadgets. Note that you click a gadget to select it and click it a second time to unselect it. Note that the gadgets you are selection in this dialog have no content.

![Add Content dialog]

8. Click Save to add your selection to the configuration. You are returned to the Content tab.

![Configuration list]

9. Click Save. You are returned to the Configuration list.
10. In the Status column, locate the Inactive toggle and click on it to toggle it to Active.
Add Content to Gadgets within a Configuration

In a configuration, you can add content to some of the gadgets so that users have a starting point when they sign in for the first time. For example, you may want to add and configure an Announcement gadget so that it collects announcements from the District site by default.

Here’s how you add content to an aggregator gadget within a configuration.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click MyView. The MyView Workspace displays.
3. Click on the name of a configuration. The configuration opens in edit mode.

![Content Browser](image)

4. Click the Content tab.
5. Click on the name of the aggregator gadget. The Settings dialog displays.

![Settings Dialog](image)

6. Click Add Content and follow the Gadget Content dialog wizard instructions. Instructions may vary depending upon the gadget.
7. Click Save. You are returned to the Settings dialog.
8. Click Save. You are returned to the Content tab.
9. Click Save. You are returned to the Configurations tab.
You can also add content to two of the Direct Feed gadgets, namely Personal Shortcuts and RSS Reader. To add content to a Personal Shortcuts gadget, replace the default text (My Shortcut) and the default website URL (http://www.google.com) to your shortcut values. To add content to the RSS Reader gadget, enter the URL for your RSS feed.

**Assign Groups to Configurations**
Here’s how you assign groups to a configuration. You may assign a group to more than one configuration.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click MyView. The MyView Workspace displays.
3. Click on the name of the configuration that you wish to edit. The configuration opens in edit mode.
4. Click the **Assign** tab.
5. Click **Add Groups**.
6. Enter a group name or part of a name and click **Search**. If you wish, you can narrow the search by choosing a group category from the Choose a Category drop-down list.
7. Click Select to the right of a group to add it to the Selected Groups area.
8. Click Add. You are returned to the Assign tab.
9. Click Save.

Configure—System Settings

By default, MyView is turned off. When you are ready to deploy MyView, you will need to activate it.

At the beginning of the school year, you can reset and have your registered choose again the sites that matter to them.

Activate MyView

Here’s how you activate MyView for your site.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click System Settings. The Settings Workspace displays.
3. Click the MyView tab.

4. Click the Activate MyView checkbox.
5. Click Save.

Once activated, all users who have been assigned MyView access will receive a default dashboard when they sign in.
Reset School Associations
When users first access MyView, they are prompted to indicate which sites matter to them. At the beginning of a new school year, you might want to have your users confirm the sites which matter to them. To do this, you reset School Associations and force the Tell Us Which Sites Matter to You dialog display again.

Here’s how you reset School Associations.

1. In Site Manager, locate and expand Configure in the Content Browser.
2. Click System Settings. The Settings Workspace displays.
3. Click the MyView tab.
4. Click Reset Now. A confirmation dialog displays.
5. Click Yes.