

# **MyView Administration Guide**

**Schoolwires® Centricity2™**





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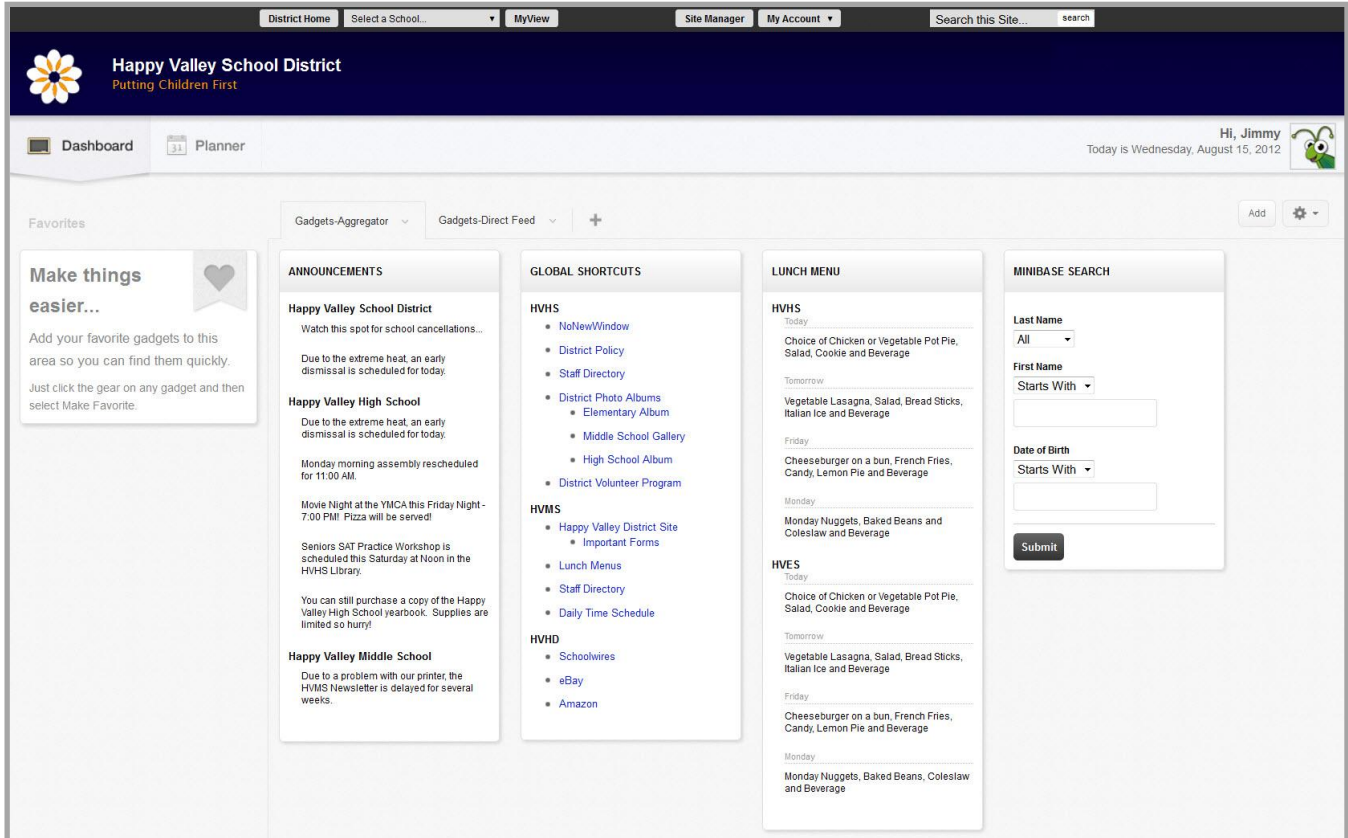
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## Introduction

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.

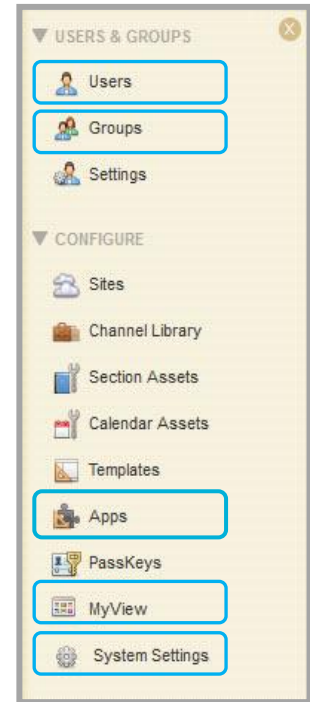
On the Planner, users can filter events from multiple workspace calendars into their Planner calendar. They can also add their own events to it. When you set up Family Relationships, parents and guardians can view the Planners of their children.

The screenshot shows the MyView Administration Planner interface for Happy Valley School District. The header includes navigation links for District Home, Select a School, MyView, My Account, and a search bar. The district logo and name are displayed, along with the tagline "Putting Children First". The user is identified as Jimmy, and the current date is Wednesday, August 15, 2012. The interface features a dashboard with a Planner tab, user selection (Me, Alice, Kevin), and a CALENDARS section with filters for Happy Valley District Calendar, Happy Valley High School Calendar, and Sparks Civil War Assignment Calendar. A calendar view for August 2012 is shown, with a weekly grid displaying events such as "Sub at HVHS Summer School", "Summer School Early Dismissal", "Summer School Pizza Lunch", "Summer School Ends", "Lead Morning Assembly", "Get Ready for the New Sch.", and "Sleep until Noon". A categories list on the left includes Unassigned, After School Activities, Assembly, Athletic Events, District Events, Early Dismissal, Elementary, Field Trips, High School, and Holiday.

## 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.

**Groups**  
Groups allow you to classify your users for later use. Add new groups and work with your current groups here.

[New Group](#) MyView Groups

STATUS	GROUP	GROUP ID	CATEGORY	GROUP CODE	ACTIONS
Active	HVHS Parents 6 User(s)	664	MyView Groups		Delete
Active	HVHS Students 10 User(s)	667	MyView Groups		Delete
Active	HVHS Teachers 8 User(s)	665	MyView Groups		Delete

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.

User Codes  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.

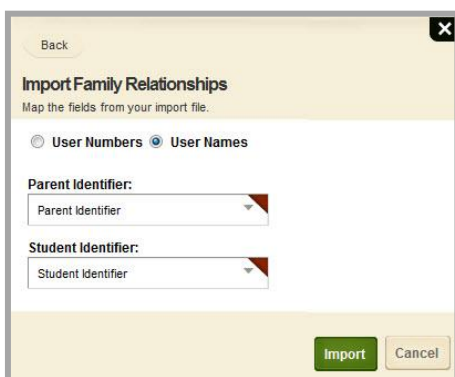
	A	B
1	Parent Identifier	Student Identifier
2	parent100	student100
3	parent100	student 101
4	parent 200	student 102

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.

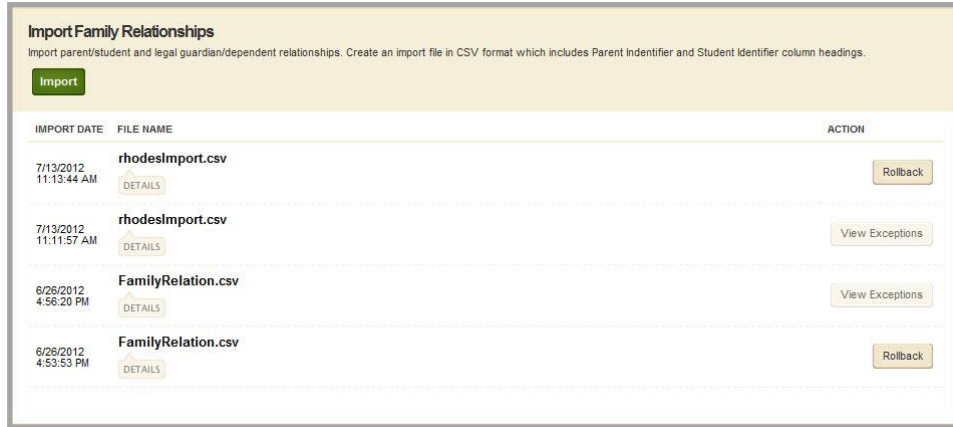


6. Click **Continue**.
7. Select either the User Codes or the User Names radio button to select the User Identifier option you wish to use and then map the fields in your import file.

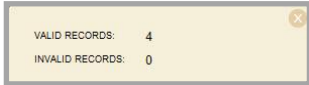
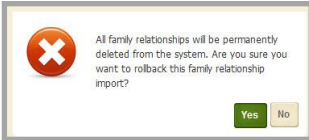
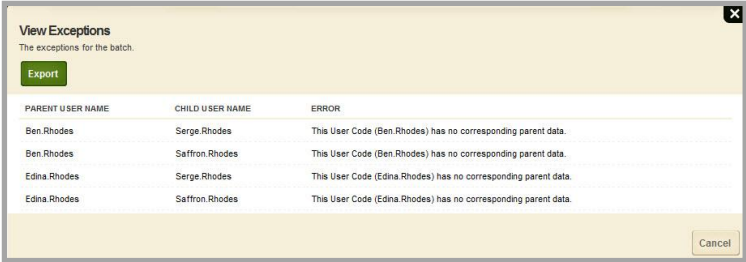


8. Click **Import**. Relationships are imported and the Import Family Relationships dialog displays. Here you will see options relating to each of your imports.





Click on Details or View Exceptions to see information about the import or click Rollback to undo the import.

Option	Description
Details	<p>Indicates the number of Valid and Invalid records encountered during the import.</p> 
Rollback	<p>Click to rollback the import and undo the Family Relationships that were created.</p> 
View Exceptions	<p>Click to obtain a list of errors encountered during an import. Click Export to send the error list to an Excel file.</p> 

## 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.

- Click the **Extended Privileges** tab.

Passport Name:  
MyView Editors

General **Extended Privileges** Users

Within each grouping, check the things that users with this passport should be able to do. These extended privileges determine what users can do beyond their regular editing privileges (Site Director, Subsite Director, Homepage Editor, Channel Director and Section Editor).

MyView

STATUS EXTEND PRIVILEGE

**INACTIVE** Manage MyView Configurations  
MyView

Save Cancel

- 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**.
- 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.

PD - Elegant Wave (1184)

Preview CSS Files & Folders

WORKSPACES

- Homepage
- Sub Page, No Nav
- MyView**
- Sub Page
- Head Content

Save Save & Publish Versions

10 pt

```

1 <div id="gb-page">
2   <div id="gb-header" class="noprint">
3     <div id="gb-logo"><a href="[SITEALIAS]"><img alt="Logo" data-bbox="112 427 142 477"/></a>
4     <h1 id="gb-name"><a href="[SITEALIAS]"><span data-bbox="112 427 142 477"/></a>
5     <h2 id="gb-tagline"><a href="[SITEALIAS]"><span data-bbox="112 427 142 477"/></a>
6     <div id="gb-global-icons"></div>
7   </div>
8   <div id="gb-channel-list" class="noprint">
9     [ChannelListNavigation props="DisplayType:Te
10  </div>
11   <div id="spn-content">
12     [ContentLayoutPlaceholder$]
13  </div>
14   <div id="gb-footer" class="noprint">
15     <div class="gb footer one">[SiteAddressOne$]
16     [SiteCity$], [SiteState$] [SiteZip$]
17     <div class="gb footer two">[SiteContactPhone$]
18   </div>
19 </div>
20
21
22
23
24

```

Active Blocks

Click an ActiveBlock below to add to the code editor.

- Breadcrumb
- Channel List Navigation
- Channel Name
- Content Layout Placeholder
- Date
- Gaggle Connector
- If Group In List Example
- If Group Matches All Example
- If Logged In
- Link
- Page List Navigation

Position: Ln 1, Ch 1 Total: Ln 24, Ch 819

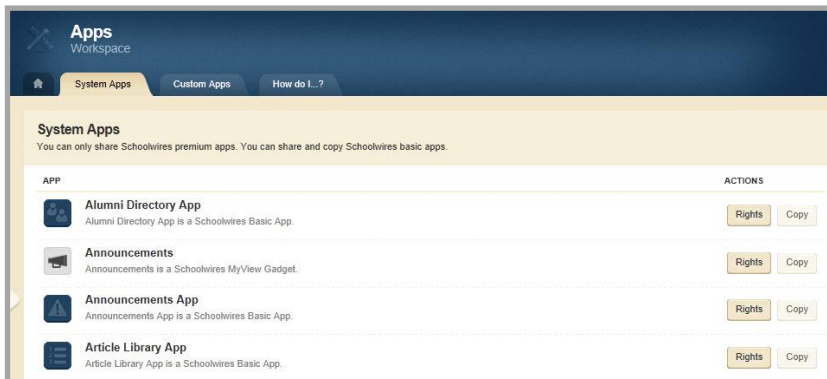
Done Internet | Protected Mode: On 100%

## Configure—Apps

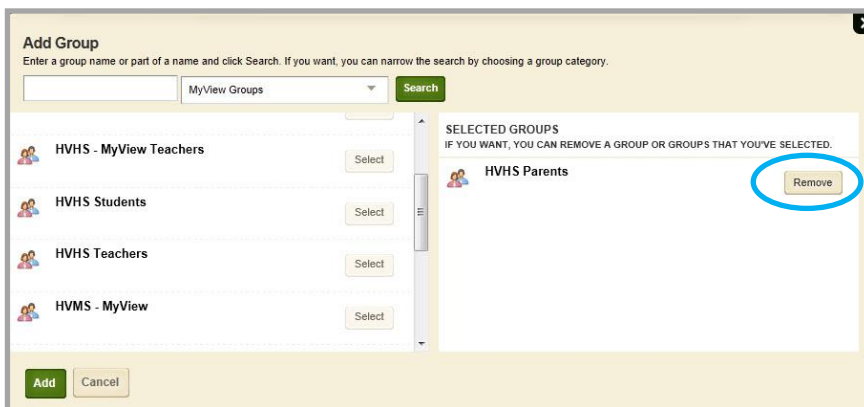
By default, all registered users have access to all the MyView gadgets and can add them to tabs on their Dashboards. You can restrict access to a gadget by setting its Sharing Rights.

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.
4. Click **Assign Group**. The Add Group 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

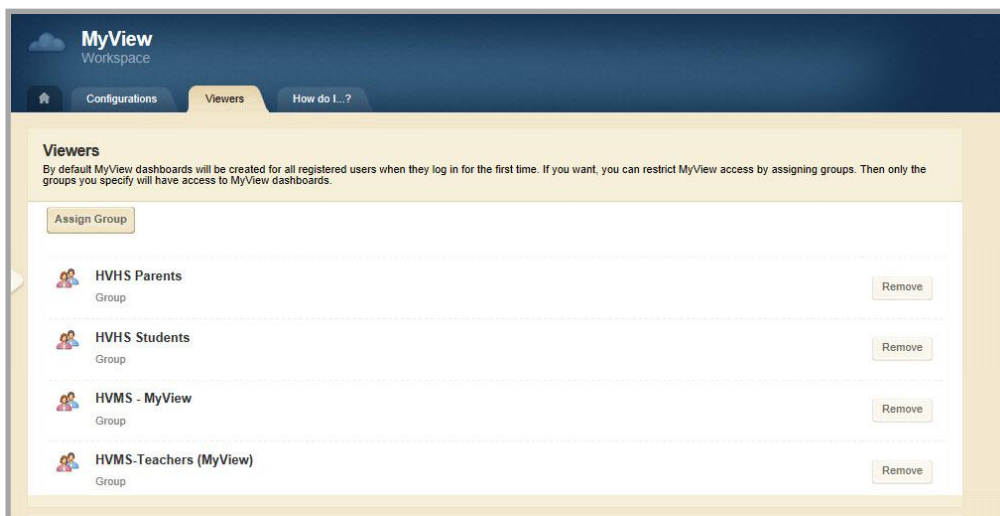
By default all Registered Users have access to MyView. You limit access to MyView by specifying groups of users on the **Viewers** tab.

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.

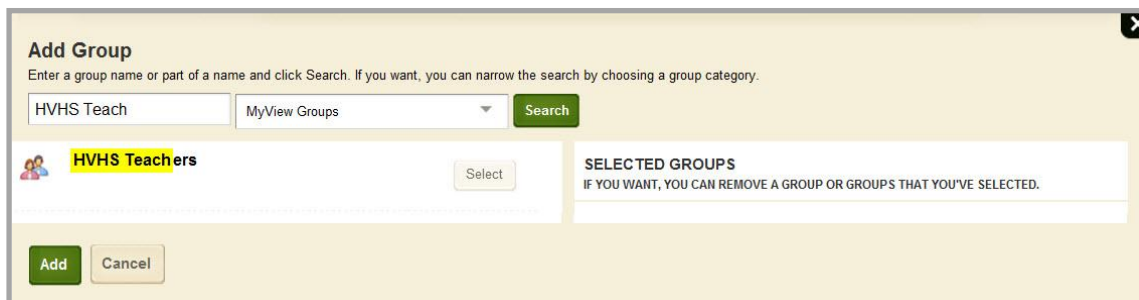
### Add Groups to Viewers Tab

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.



4. Click **Assign Group**. The Add Group dialog displays.
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.

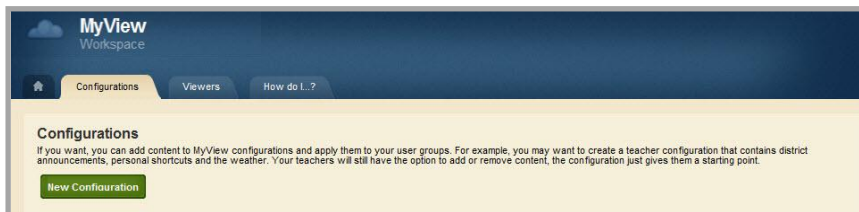
To remove a group, on the **Viewers** tab, click **Remove**.

## Create Configurations

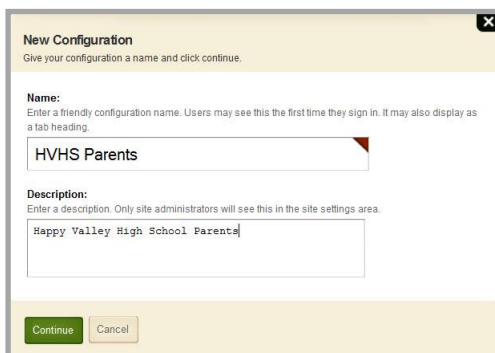
All registered users have access to a default configuration. A configuration is a set of one or more gadgets. The default configuration includes the Personal Shortcuts gadget. You can create additional configurations and allow users to access the configuration by assigning groups of users on the Configuration **Assign** tab.

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

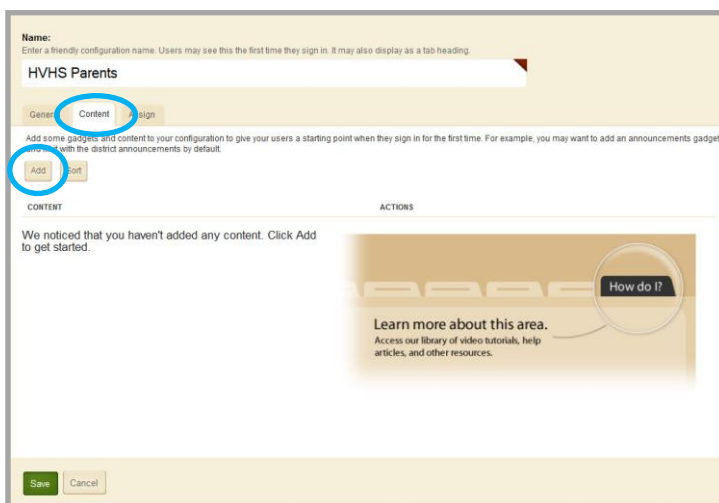
1. In *Site Manager*, locate and expand Configure in the Content Browser.
2. Click MyView. The MyView Workspace displays.



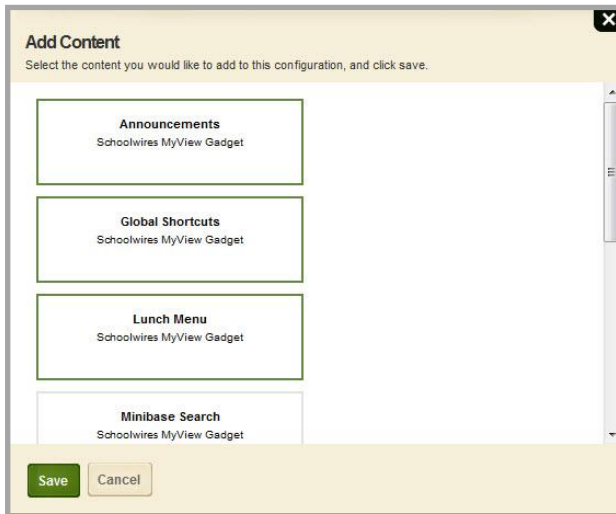
3. Click **New Configuration**. The New Configuration dialog displays.
4. Enter a name for the configuration. You can also add a description if you like.

The screenshot shows a 'New Configuration' dialog box. It has a title bar with a close button (X). Below the title, it says 'Give your configuration a name and click continue.' There are two input fields: 'Name:' with the value 'HVHS Parents' and 'Description:' with the value 'Happy Valley High School Parents'. At the bottom, there are 'Continue' and 'Cancel' buttons.

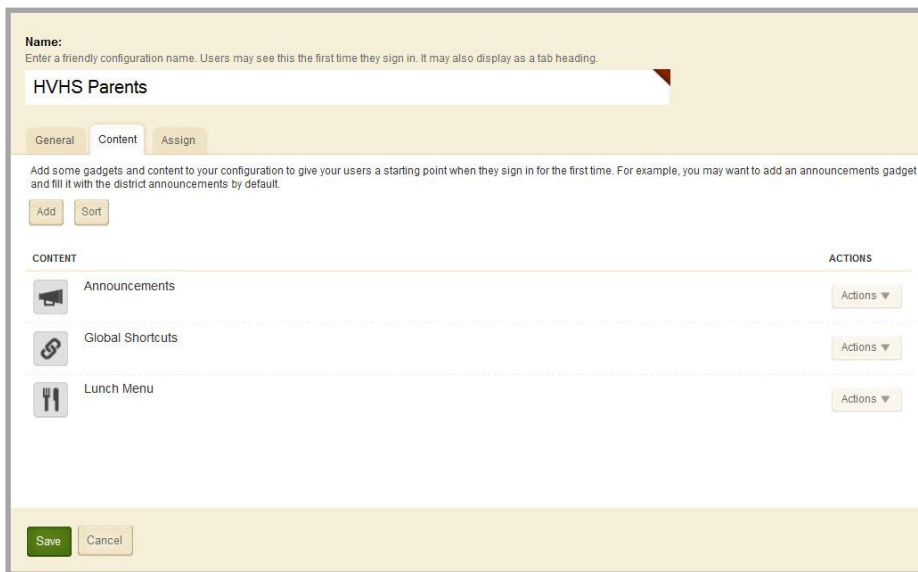
5. Click **Continue**. The **Content** tab displays.

The screenshot shows the 'Content' tab of the configuration editor. The 'Name' field is 'HVHS Parents'. Below it, there are tabs for 'General', 'Content', and 'Assign'. The 'Content' tab is selected. There is an 'Add' button circled in blue. Below the tabs, there is a section for 'CONTENT' and 'ACTIONS'. The 'CONTENT' section has a message: 'We noticed that you haven't added any content. Click Add to get started.' The 'ACTIONS' section has a 'How do I?' button. At the bottom, there are 'Save' and 'Cancel' buttons.

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.



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



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.

**Name:**  
Enter a friendly configuration name. Users may see this the first time they sign in. It may also display as a tab heading.

Aggregator Gadgets

General Content Assign

Add some gadgets and content to your configuration to give your users a starting point when they sign in for the first time. For example, you may want to add an announcements gadget and fill it with the district announcements by default.

Add Sort

CONTENT	ACTIONS
Announcements	Actions ▼
Global Shortcuts	Actions ▼
Lunch Menu	Actions ▼
Minibase Search	Actions ▼

Save Cancel

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

**Settings**

Click and drag to rearrange your content or click X to remove it. Double click to change a heading.

Add Content

It looks like you haven't added any content to this gadget yet. Click Add to start filling it up.

Display this many announcements per area:  
5 ▼

Save Cancel

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.

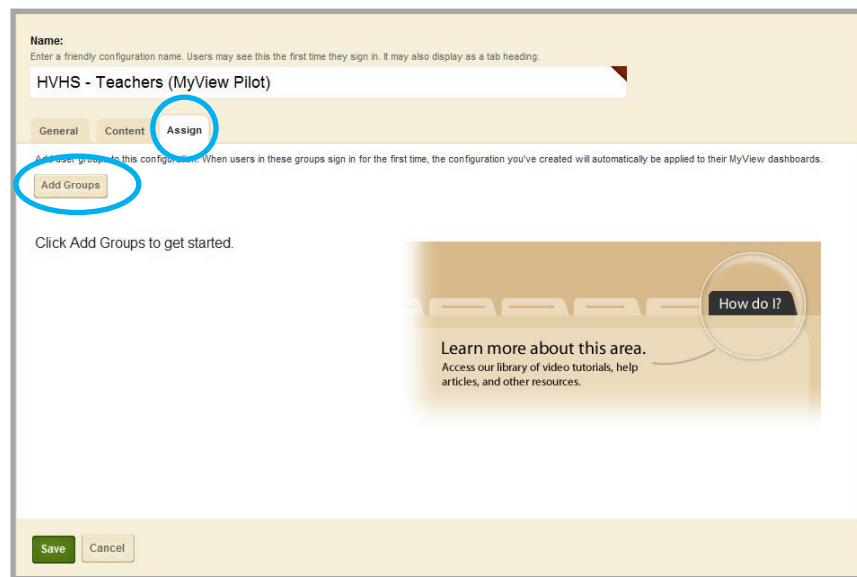


You can also add content to two of the Direct Feed gadgets, namely Personal Shortcuts and RSS Reader. To add content to a Personal Shortcuts gadget, replace the default text (*My Shortcut*) and the default website URL (*http://www.google.com*) to your shortcut values. To add content to the RSS Reader gadget, enter the URL for your RSS feed.

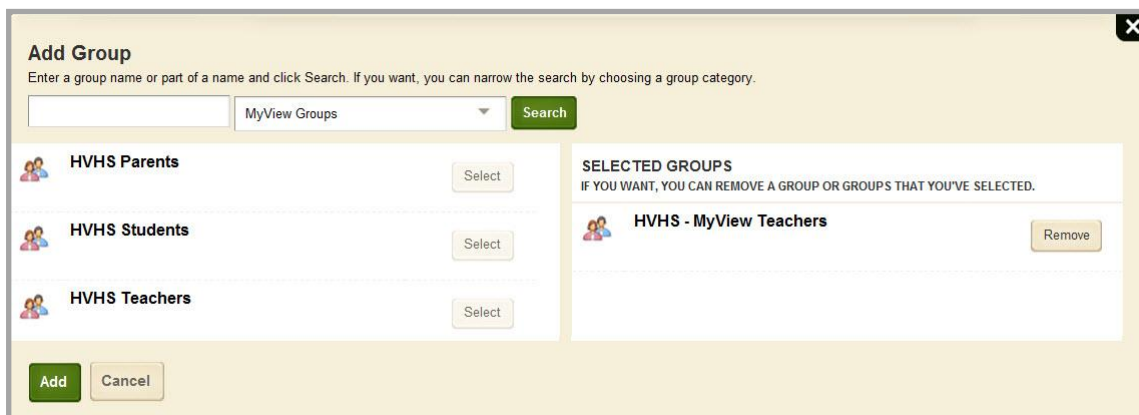
### Assign Groups to Configurations

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

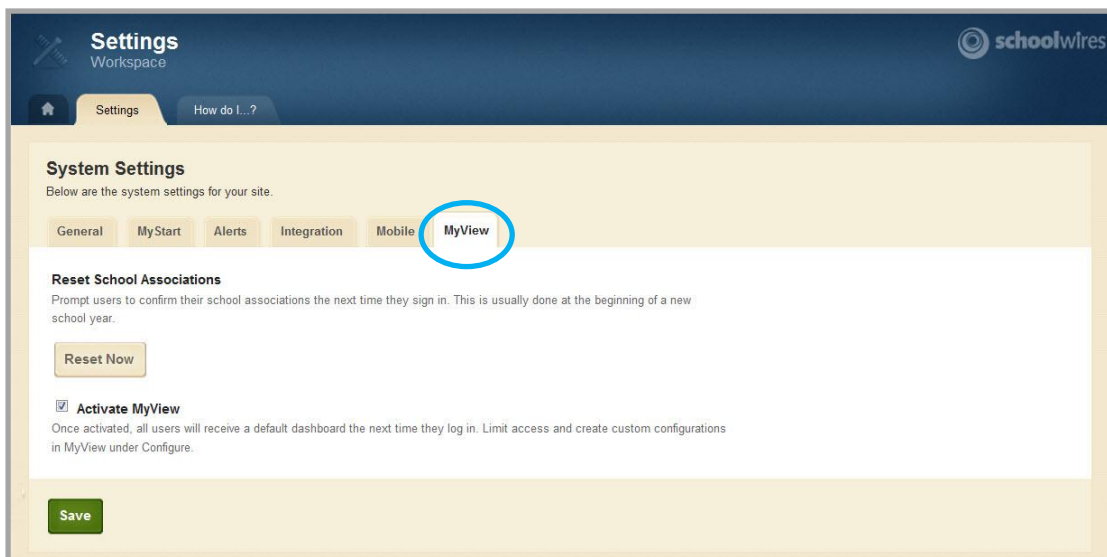
By default, MyView is turned off. When you are ready to deploy MyView, you will need to activate it.

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.

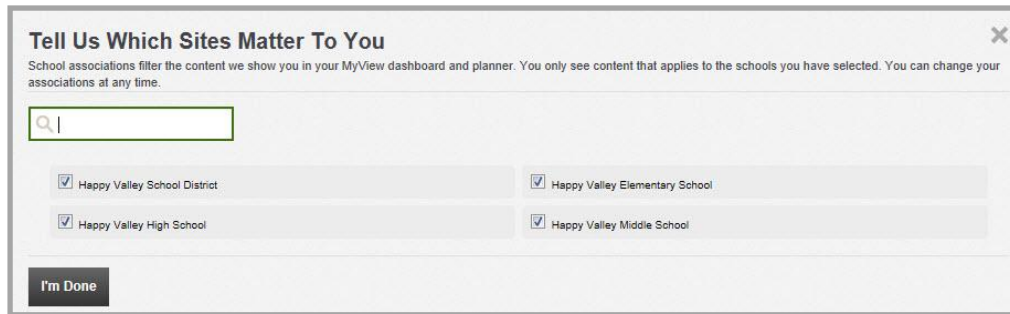


4. Click the Activate MyView checkbox.
5. Click **Save**.

Once activated, all users who have been assigned MyView access will receive a default dashboard when they sign in.

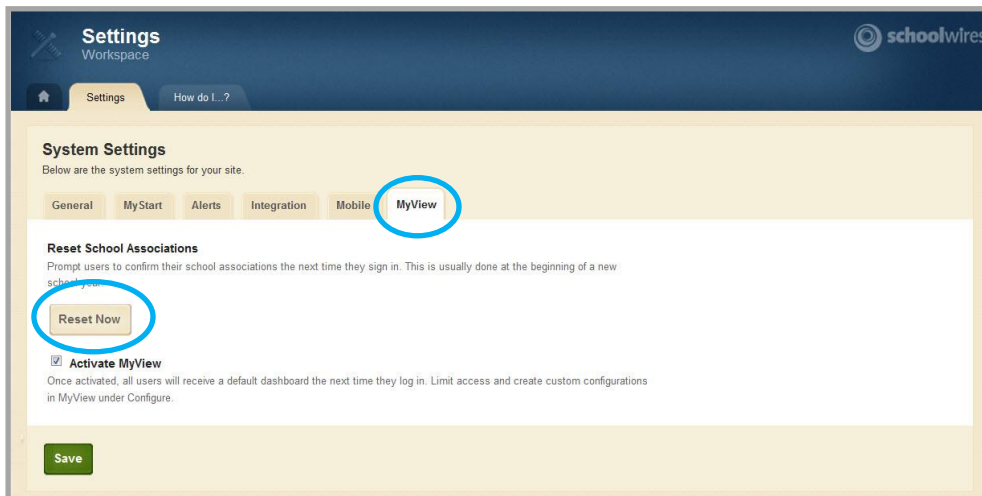
## Reset School Associations

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.

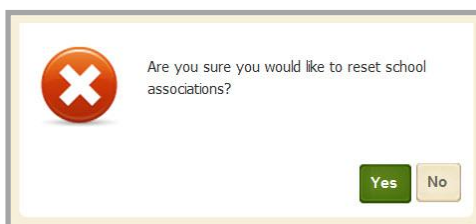


Here's how you reset School Associations.

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**.