

Set Up Section Membership

Schoolwires® Centricity2™



Table of Contents

Introduction 1

System Settings 2

 Activate the Section Membership Tab for all Sites 2

 Deactivate the Section Membership Tab for a Site 2

Family Relationships 3

 Import Family Relationships 3

 Adding Individual Family Relationship 5

The Section Membership Tab 6

 Assign Section Members 6

 Change Section Image 8

 Message Section Members 9

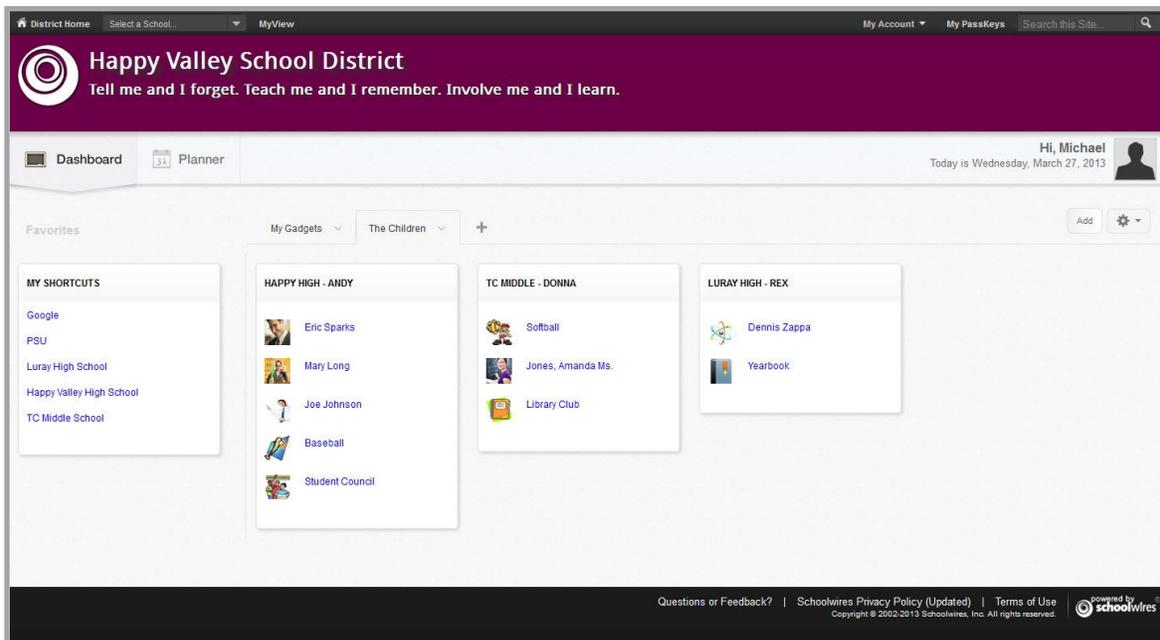
The Section Membership Gadget 11

Membership Best Practices 13

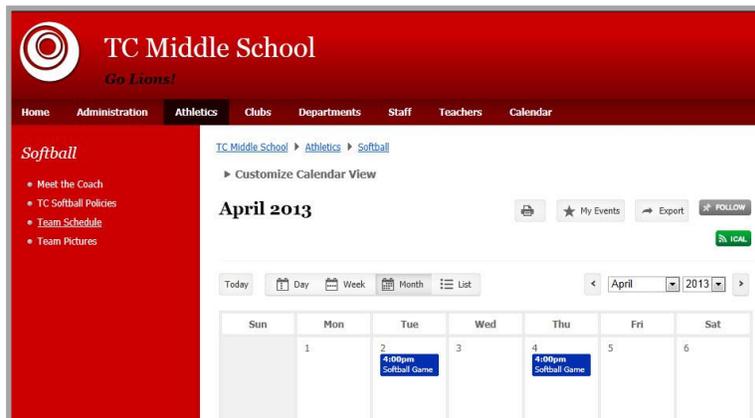
Introduction

With *Section Membership*, parents and students are added as members to sections of sites and subsites. Those members are then able to add *Section Membership* gadgets to their MyView dashboard that they use to display established section memberships and to navigate to those sections. In order for the Membership Gadgets to function properly MyView must be in place and site administrators must activate section membership and build family relationships. Editors with editing privilege then add members to sections.

Here you see the MyView Dashboard of Mr. Michael Sims. He has added a Membership Gadget for each of his children: Andy—enrolled at Happy Valley High School, Donna—enrolled at TC Middle School and Rex—enrolled at Luray High School. All are schools within the Happy Valley School District.



To see when Donna plays softball again, Mr. Sims clicks the Softball link in the *TC Middle – Donna* Section Membership gadget. A new window opens and displays the Softball section of the Athletics channel of TC Middle School. Mr. Sims clicks *Team Schedule* to view the games calendar.



System Settings

To initiate Section Membership, you must turn on the **Section Membership** tab for all section workspaces across all sites. Once activated, you can deactivate this tab on a site by site basis.

Activate the Section Membership Tab for all Sites

Here's how you activate the **Section Membership** tab for all sites.

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

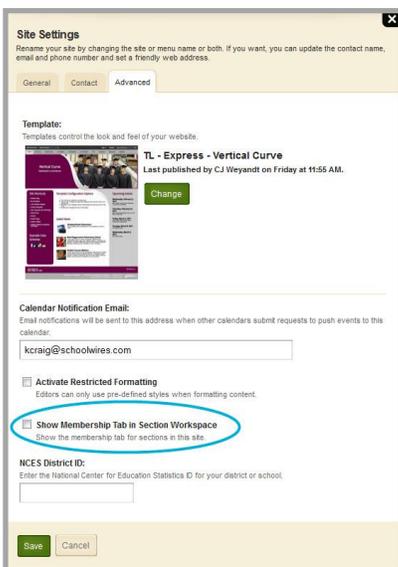


3. On the **General** tab, activate the *Allow Membership Tab in Section Workspace* check box.
4. Click **Save**.

Deactivate the Section Membership Tab for a Site

Here's how you deactivate the **Section Membership** tab for a site. Once the tab is activated for all of your sites, you can deactivate the **Section Membership** tab on a site-by-site basis.

1. In *Site Manager*, expand SITE & CHANNELS in the Content Browser.
2. Click Change Site and select a site in the Sites list. .
3. Click **Settings**. The Site Settings dialog displays.
4. Click **Advanced**. The **Advanced** tab opens.
5. Deactivate the Show Membership Tab in Section Workspace check box.



6. Click **Save**. You are returned to the workspace.

Note that you can also change this setting by editing a site within the Sites Workspace.

Family Relationships

You connect parents and students by setting up *Family Relationships*. These relationships can be created using *Import Family Relationships* or by setting up 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.

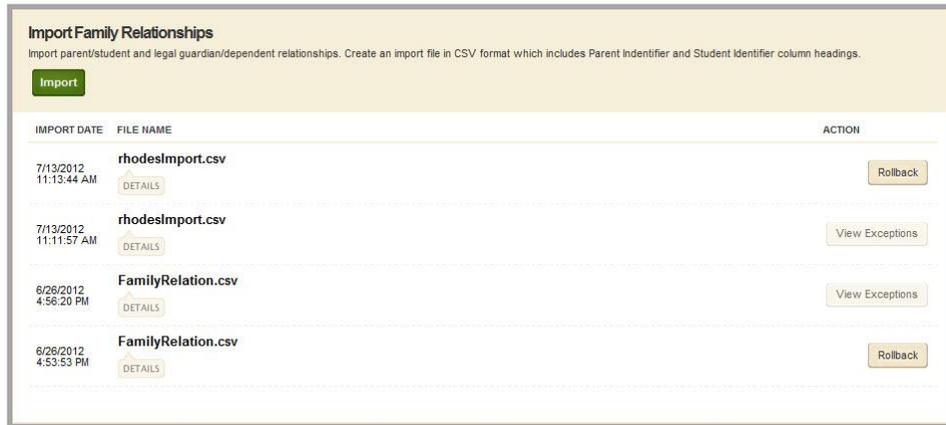
1. In *Site Manager*, expand Users & Groups in the Content Browser.
2. Click Users.
3. Click the **Import Family Relationships** tab.
4. Click **Import**.
5. Click **Browse** and locate your CSV file. Click **Open** to select the file.



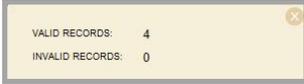
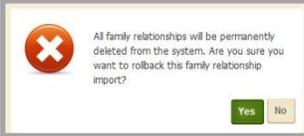
6. Click **Continue**.
7. Select either the User Codes or the User Names radio button to select the User Identifier option you wish to use and then map the fields in your import file.



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

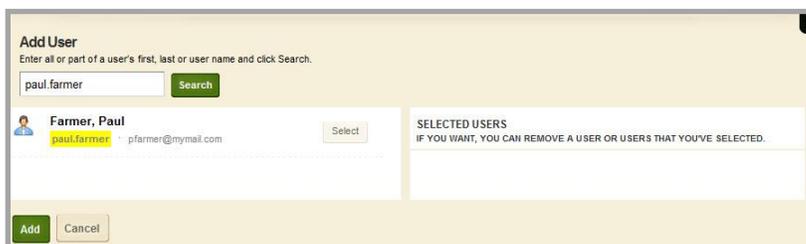
Adding Individual Family Relationship

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. Continue until all students have been selected.



9. Click **Add**. The Family Relationship is created.
10. Click **Save**. The user record is updated and you are returned to the **Users** tab.

The Section Membership Tab

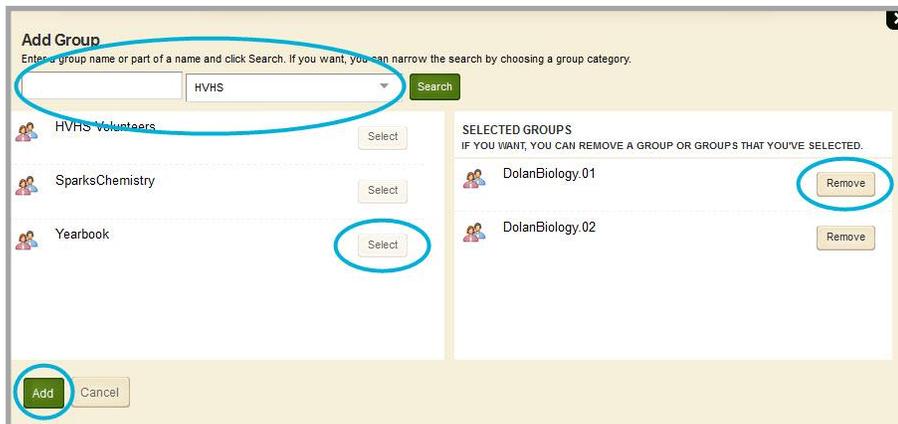
Any editor with the privilege to edit a section can set up the Section **Membership** tab for the section. This includes assigning members individually or by group and changing the image that displays for the section in the Section Membership gadget. They can also send direct email messages to section members.



Assign Section Members

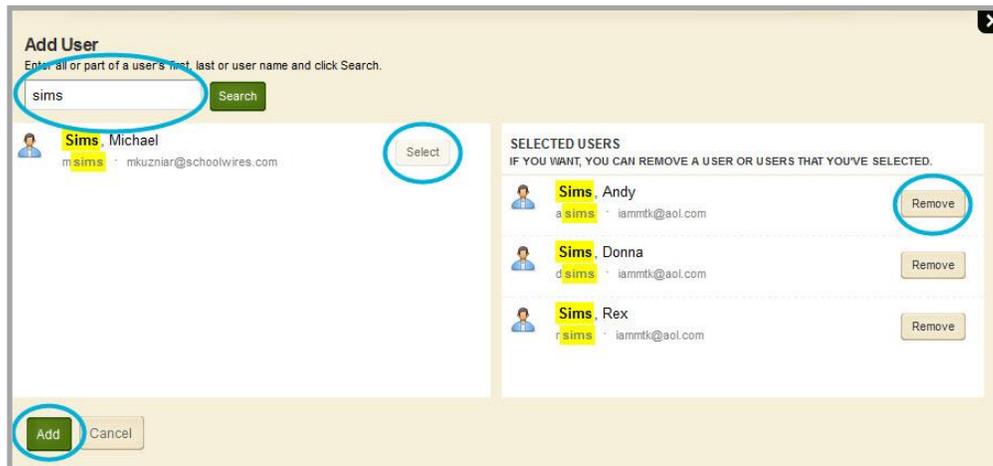
Here's how you assign members to a section.

1. In *Site Manager*, navigate to the section to which you wish to add members.
2. Click the **Membership** tab. The Section Members window displays.
3. Click **Assign Group** to add groups of users. The Add Group dialog displays.

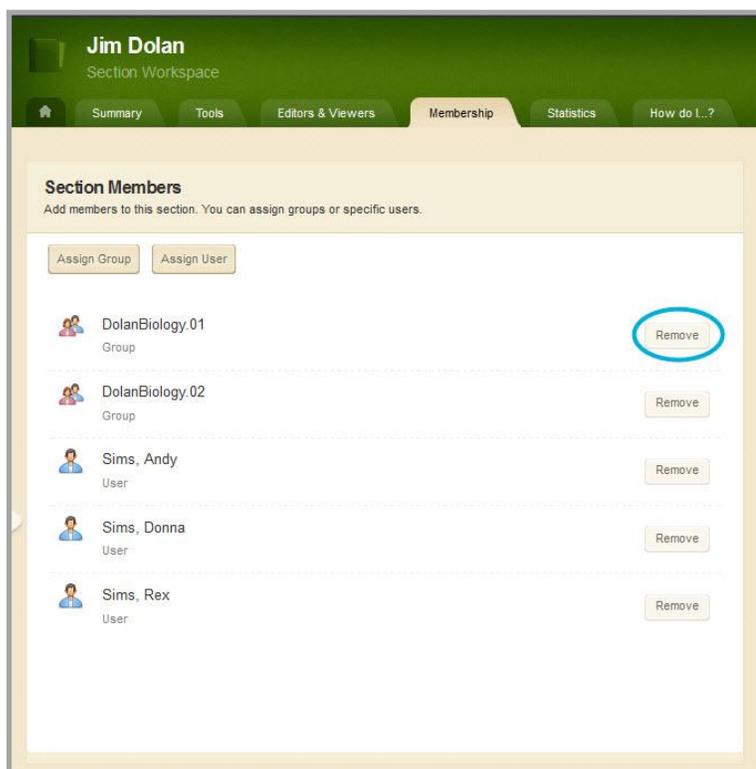


4. Enter a group name or part of a group name and click **Search**. Note that you can narrow a search by choosing a group category from the drop-down list. Click **Select** to move a group to the Selected Groups list. Click **Remove** to delete a group from the Selected Groups list. When finished, click **Add** to return to the Section Members window.

- Click **Assign User** to add individual users. The Add User dialog displays.



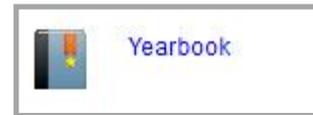
- Enter all or part of a user first, last or user name and click **Search**. Click **Select** to move a user to the Selected Users list. Click **Remove** to delete a user from the Selected Users list. When finished, click **Add** to return to the Section Members window.



- Click **Remove** to the right of a group or individual and then **Yes** on the confirmation dialog to remove the entry from Section Members.

Change Section Image

You can replace the default section image with an image of your choice. The image selected here appears as an accent image for the section when it is displayed within the Membership Gadget.

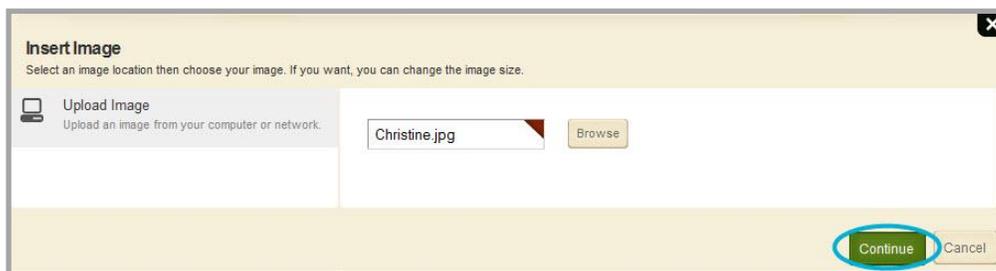


Here's how you change the default section image.

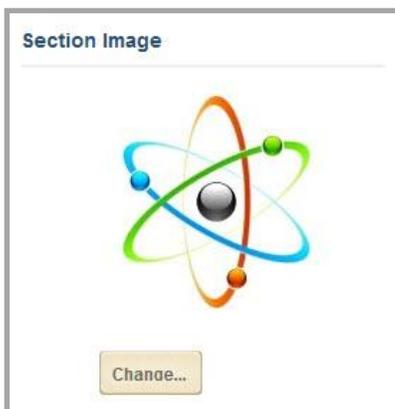
1. In *Site Manager*, navigate to the section to which you wish to change the Section Image.
2. Click the **Membership** tab. The Section Members window displays.



3. Click **Change**. The Insert Image wizard displays.
4. Click **Browse**, locate and select a new section image. Images must be of the type JPG, JPEG, PNG or GIF.

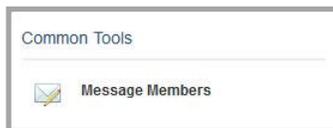


5. Click **Continue**. Height and width attributes for your image are set to the proper size for a section image.
6. Click **Insert Image**. The Section image is replaced and you are returned to the **Membership** tab.



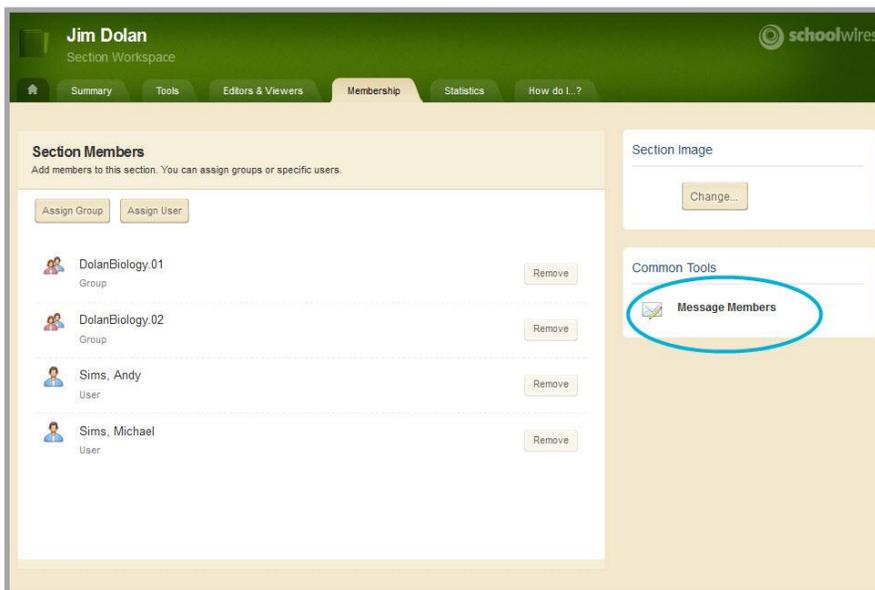
Message Section Members

You can send Email messages to the members of a section by using the Common Tool *Message Members*. You compose an Email message and then which members will receive it.

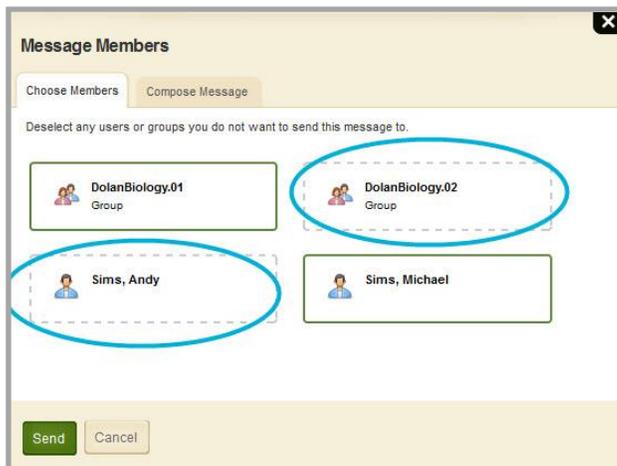


Here's how you message members.

1. In *Site Manager*, navigate to the section containing the members to which you wish to send an Email message.
2. Click the **Membership** tab. The Section Members window displays.



3. In Common Tools, click **Message Members**. The Message Members dialog displays.
4. By default, all members are selected as message recipients. On the **Choose Members** tab, click on any users or groups that you wish to exclude from the Email message. Deselected users and groups display with a broken border.



5. Click the **Compose Message** tab. All fields on this tab are mandatory. Note that the Sender Name and the Sender Email fields auto-populate. Enter a message Subject and Body.

Message Members

Choose Members **Compose Message**

Sender Name:
Jim Dolan

Sender Email:
jdolan@hvdsd.org

Subject:
Quarterly Biology Projects Due

Body:
Just a reminder to the parents and students enrolled in Biology Section 01, Extra credit projects are due on Friday.

Send Cancel

6. Click **Send**. You are returned to the **Membership** tab.

Note that Email addresses used for member recipients are pulled from the each member's user account. If there is no address entered, no email will be sent.

Last Name, First:
Sims, Michael

Generate Password Reset Password Emulate User Delete User

General Address Groups Family Relationships Advanced

User Name:
msims

Passport:
Controls the user's extended privileges on your site.
Parents

Title:

Email Address:
dsims@mailme.com1

Phone Number:

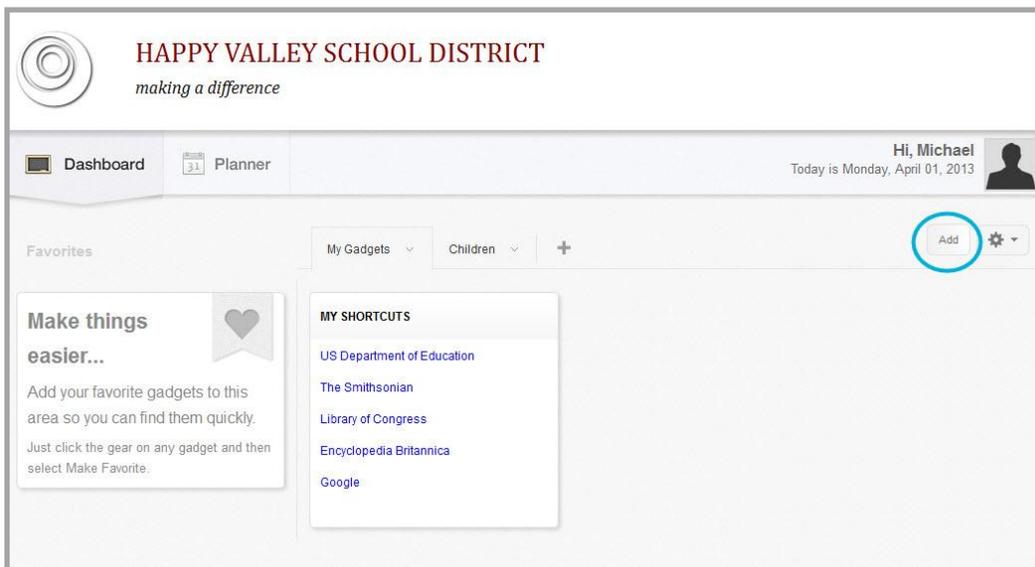
Save Cancel

The Section Membership Gadget

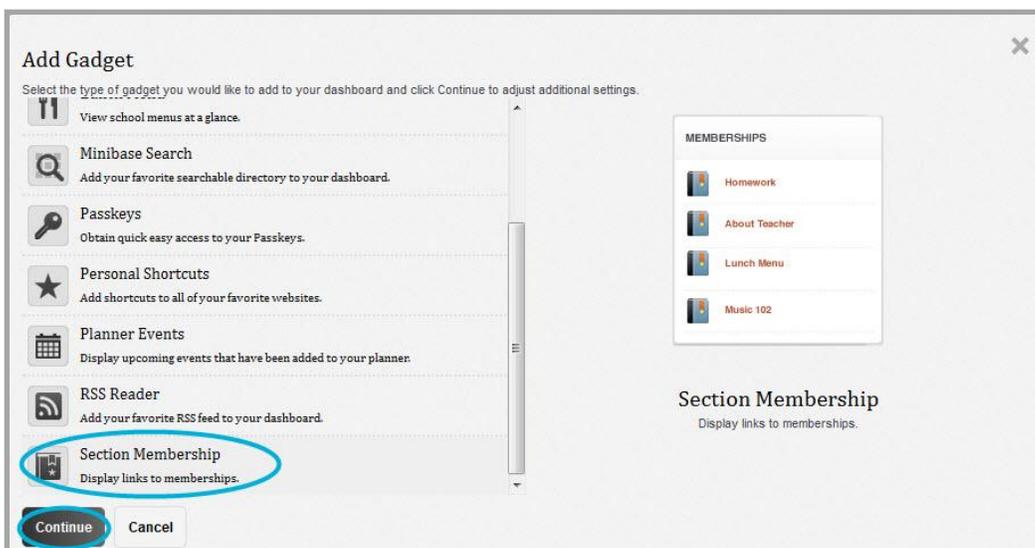
After Section Membership and Family Relationships are in place, MyView add Section Membership gadgets to their dashboards. Note that the Section Membership gadget is a *Direct Feed* gadget. A direct feed gadget displays content that is fed directly to it.

Here's how you add a Membership Gadget to your dashboard.

1. At the end-user website, navigate to your MyView Dashboard.
2. Click **Add**. The Add Gadget dialog displays.



3. Select the Section Membership gadget.



4. Click **Continue**. The Gadget Name dialog displays.

- Accept the default name *Section Membership* or enter a different name for the gadget.

← Back

Gadget Name

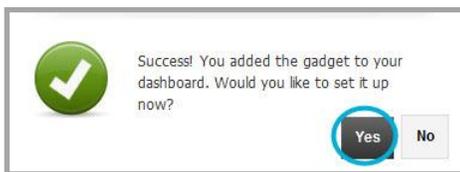
Enter a name for your gadget and click Continue.

Name:

HVHS - Andy

Continue Cancel

- Click **Continue**. A Success dialog displays.



- Click **Yes** to set up the gadget. The Settings dialog displays.

Settings

Display memberships for:

Andy

Save Cancel

- Click the *Display memberships for:* drop-down and select yourself or a student from the list. Note that the drop-down list includes you and users flagged as student family members.
- Click **Save**. The Section Membership gadget is added to your dashboard and all section memberships for the selected member display.
- Click a link within the gadget to navigate to that section. The section opens in a new window.

HAPPY VALLEY SCHOOL DISTRICT
making a difference

Dashboard Planner

Hi, Michael
Today is Monday, April 01, 2013

Favorites

My Gadgets Children +

Make things easier...

ADD YOUR FAVORITE GADGETS TO THIS AREA SO YOU CAN FIND THEM QUICKLY. JUST CLICK THE GEAR ON ANY GADGET AND THEN SELECT MAKE FAVORITE.

MY SHORTCUTS

- US Department of Education
- The Smithsonian
- Library of Congress
- Encyclopedia Britannica
- Google

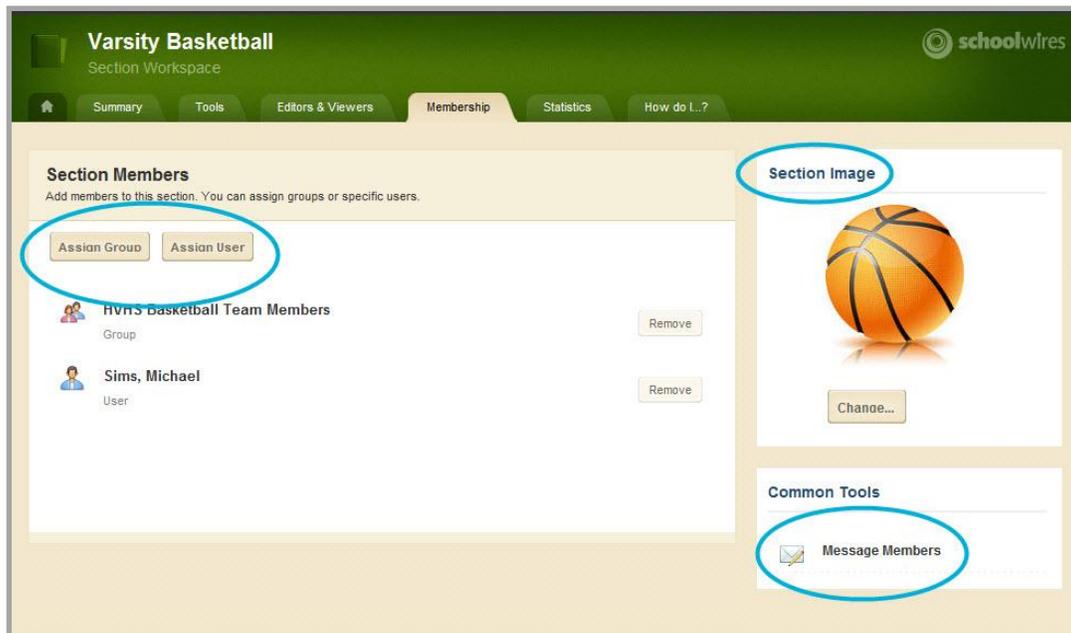
HVHS - ANDY

- Sparks, Eric
- Varsity Basketball

Membership Best Practices

Here are some practices you should consider when working with membership.

- Use only file types of JPG, JPEG, PNG and GIF for the section image.
- Be sure to add yourself as a section member if you wish to view your memberships using a Section Membership gadget and to be included in member messages.



- The maximum number of characters permitted for a gadget name is 20.
- You can create up to five tabs on your MyView Dashboard and have up to ten gadgets on each tab.