# Set Up Section Membership

## Schoolwires<sup>®</sup> Centricity2<sup>™</sup>



## **Table of Contents**

#### 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.

n District Home Select a School	▼ MyView		My A	Account 🔻 My PassKeys Search this Site	٩,
Happy Valle Tell me and I forg	y School District et. Teach me and I remember. In	volve me and I learn.			
Dashboard	r			Hi, Michael Today is Wednesday, March 27, 2013	1
Favorites	My Gadgets $\sim$ The Children $\sim$	+		Add 🔅	• •
MY SHORTCUTS	HAPPY HIGH - ANDY	TC MIDDLE - DONNA	LURAY HIGH - REX		
Google PSU	Eric Sparks	Softball	Dennis Zappa		
Luray High School Happy Valley High School TC Middle School	Mary Long	Jones, Amanda Ms.	Yearbook		
	Baseball				
	Student Council				
			Questions or Feedback?   Schoolwires Priva Copyright @ 2	cy Policy (Updated)   Terms of Use Occ22013 Schoolwires, Inc. All rights reserved.	by Mwires®

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.

TC Middle School									
Home	Administration	Athletics	Clubs	Departments	Staff	Teachers	Calendar		
Softball • Meet the Coach • TC Softball Policies • Team Schedule • Team Pictures		IC.	Middle Scho Customi pril 2	ol > Athletics > Sof ze Calendar View 013	v Month	i≣ List	ê ★ My	Events 🔿 E	xport x FOLLOW 104L
			Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2 4:00pm Softball Game	3	4 <b>4:00pm</b> Softball Game	5	6
					Softball Game		Softball Game		

### **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.

Allow	Membership Tab in Section Workspace
This is	recommended if you have a membership connector with an SIS system or if your students have user accounts

- 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.

	Contact	Advanced
Templates	control the loo	k and feel of your website.
10 (Sec. 1996) 1	NIC	TL - Express - Vertical Curve
Bellux Core	100	Last published by CJ Weyandt on Friday at 11:55 AM.
TR Dates and a	(C)(C)	Change
	Protection of the local division of the loca	Research Branning
-	1	NUMBER OF CONTRACTOR OF CONTRA
Constant of Constant	anterestation de la	Rea 1
	a management	
6521-		
alandar I	Notification	
aleliual i	ations will be	Email: and to this address when other colordary subsitizations to such available this
alendar.	ations will be	Email: sent to this address when other calendars submit requests to push events to this
mail notific alendar. kcraig@	ations will be	Email: sent to this address when other calendars submit requests to push events to this s.com
mail notific alendar. kcraig@	ations will be	Email: sent to this address when other calendars submit requests to push events to this s.com
mail notific alendar. kcraig@	ations wil be Ischoolwire	Email: sent to this address when other calendars submit requests to push events to this s.com dFormatting
mail notific alendar. kcraig@ Activa Editors	ations will be schoolwire te Restricte can only use	Email: Email: So the address when other calendar's submit requests to push events to this a com of formatting pre-defined adjusts when formatting context.
mail notific alendar. kcraig@ Activa Editors	schoolwire schoolwire te Restricte can only use	Email: set to this address when other calendars submit requests to push events to this address of the set of
Activa Activa Activa Show	schoolwire schoolwire te Restricte can only use Membershi the membershi	Email: sente this address when other calendar's submit requests to push events to this s.com of formatting pre-defined styles when formatting content. pTablin Section Workspace to the for sections in the sec
Activa Editors Show 1	Ischoolwire Ischoolwire Ite Restricte can only use Membershi the membershi	Email: a com d formatting pre-defined skyles when formatting content. p Table in Section Workspace bits for sections in this skyle
Activa kcraig@ Activa Editors Show Show 1 CES Dist nter the Ne	te Restricte can only use Membershi the membershi rict ID: tional Center	Email: secon d Formatting pre-defined styles when formatting content. P Tab in Section Workspace to tab for sections in this ate. To Education Statistics D for your district or school.
Activation of the second secon	te Restricte can only use Membershi the membershi rict ID: tional Center	Email: scom dromatting pre-drifted silves when formating context. Pro the freed silves when formating context. Pro the Scoton Workspace to tak for sections in this site. To Education Statistics D for your district or school.

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.

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.

port Family Relationships	lownload a sample C <sup>o</sup>	SV import file	
		ar inport nid.	
FamilyRelation.csv		Bro	owse
		-	

- 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.



1	A	В
1	Parent Identifier	Student Identifier
2	parent100	student100
3	parent100	student 101

4 parent 200

student 102

User Codes O User Names

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

mport		
IPORT DATE	FILE NAME	ACTION
/13/2012	rhodesImport.csv	Rollback
11:13:44 AM	DETAILS	
7/13/2012	rhodesImport.csv	View Excentions
1:11:57 AM	DETAILS	
/26/2012	FamilyRelation.csv	View Excention
:56:20 PM	DETAILS	Por Ecopion
/26/2012	FamilyRelation.csv	Bollback
1:53:53 PM	DETAILS	Rollbac

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.

Farmer	. F	red	
Generate Password Reset Password	Emulate User Delete Us	r	
Add a Student Add a Student We noticed you haven't added this st relationships yet. Click Add a Studen	udent to any family t to get started.	Learn more about Access our library of video to articles, and other resources	How do I? this area. torials, help
Course 1			

- 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.

Add User Enter all or part of a user's first, last or user name and click Search. paul.farmer Search	
Sele	et SELECTED USERS IF YOU WAIT, YOU CAN REMOVE A USER OR USERS THAT YOU'VE SELECTED.
Add	

- 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.

Winney       Yeades & Marcelon Balance         Section Members         And members be the action. You can assign groups or specific users.         Angen Group       Angen Marc         You haven't added any busics or Assign Group to get startio.       Imagen Marc         Imagen Marc       Imagen Marc         Imagen Marc       Imagen Marc         Imagen Group       Imagen	Jim Dolan Section Workspace		Schoolwires
Secton Members And members it this section. Vor can assage groups or specific users Anager Group Cuck Assign Group Cuck Ass	Summary Tools Editors & Viewers Membership Statistics How do I?		
	Section Members Add members to this section. You can assign groups or specific users. Assign Oroup Assign Oroup Assign Group Section Assign Group Section Assign Group Assign Gro	Section Image	

#### **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.

Add Group Enter a group name or part of a name and click Search. HVHS	If you want, you can narrow th	e search by choosing a group category. ch
K HVHS Volunteers	Select	SELECTED GROUPS IF YOU WANT, YOU CAN REMOVE A GROUP OR GROUPS THAT YOU'VE SELECTED.
SparksChemistry	Select	BolanBiology.01
K Yearbook	Select	DolanBiology.02
Add Cancel		

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.

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

Add User Enter all or part of a user's met, last or user name and click Search. sims	
Sims, Michael	SELECTED USERS
_	Sims, Andy a sims         Remove
	Sims, Donna d <mark>sims</mark> i iammtk@aol.com
	Sims, Rex rsims ' iammtk@aol.com Remove
Add Cancel	

6. 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.

	Summary	Tools	Editors & View	ers	Membership	Statistics	How do L.
ectio	on Members						
id mer	nbers to this section	. You can a	ssign groups or spe	ecific users.			
Assig	n Group Assig	n User					
<u>\$</u>	DolanBiology. Group	01					Remove
<u>8</u>	DolanBiology.	)2					Remove
8	Sims, Andy <sub>User</sub>						Remove
8	Sims, Donna <sup>User</sup>						Remove
8	Sims, Rex						Remove

7. 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.

-		5	
	X		

- 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.

Ins Sele	ert Image ct an image location then choose your image. If you war	t, you can change the image size	a.	×
	Upload Image Upload an image from your computer or network.	Christine.jpg	Browse	
				Continue

- 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.

Comm	on Tools	
	Message Members	

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.

	Jim Dolan Section Workspace		Schoolwires
	Summary Tools Editors & Viewers Membership Statistics	How do L?	
Sectio Add mem	n Members bers to this section. You can assign groups or specific users.		Section Image
Assign	DolanBiology.01 Group	Remove	Common Tools
&	Group Sims, Andy User	Remove	
&	Sims, Michael User:	Remove	

- 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.

hoose Members	Compose Message		
Belect any users	or groups you do not want to	o send this message to.	>
â Sims, A	Andy	Sims, Michael	
Send	ł		

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.

Nessage Members	
Choose Members Compose Message	
Sender Name:	
Jim Dolan	
Sender Email:	-
jdolan@hvsd.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.

Sims				,	Michael	
Generate	Password	Reset Pass	word Emulate User	Delete User	]	
General	Address	Groups	Family Relationships	Advanced		
Jser Nam	e:					
msims						
Parents			×			
mail Add	ress:					
dsims@	mailme.co	m1				
none nu						

## **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.

HAPPY VALLE making a difference	Y SCHOOL DISTRICT	
Dashboard 31 Planner		Hi, Michael Today is Monday, April 01, 2013
Favorites	My Gadgets $\lor$ Children $\lor$ +	Add 🌣 🕶
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	

3. Select the Section Membership gadget.

tct the <u>type of gadget</u> you would like to add to your dashboard and click Continue to adjust ac View school menus at a glance.	ditional settings.
Minibase Search	MEMBERSHIPS
Add your favorite searchable directory to your dashboard.	Homework
Passkeys Obtain quick easy access to your Passkeys.	About Teacher
Personal Shortcuts Add shortcuts to all of your favorite websites.	Lunch Menu
Planner Events Display upcoming events that have been added to your planner.	
RSS Reader Add your favorite RSS feed to your dashboard.	Section Membership Display links to memberships.
Section Membership Display links to memberships.	

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

5. 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	

6. Click Continue. A Success dialog displays.



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



- 8. 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.
- 9. Click **Save**. The Section Membership gadget is added to your dashboard and all section memberships for the selected member display.
- 10. Click a link within the gadget to navigate to that section. The section opens in a new window.

HAPPY VALLE making a difference	Y SCHOOL DISTRICT	
Dashboard 31 Planner		Hi, Michael Today is Monday, April 01, 2013
Favorites	My Gadgets ~ Children ~ +	Add 🔅
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	

## **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.

Varsity Basketball Section Workspace		Schoolwires
Summary     Tools     Editors & Viewers     Membership     Statistics       Section Members       Add members to this section. You can assign groups or specific users.       Assian Group       Assian User       Image: Assian User	How do L.? Remove Remove	Section Image
		Common Tools

- 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.