

Launching Faculty, Parent, and Student Portals for Existing Schools

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

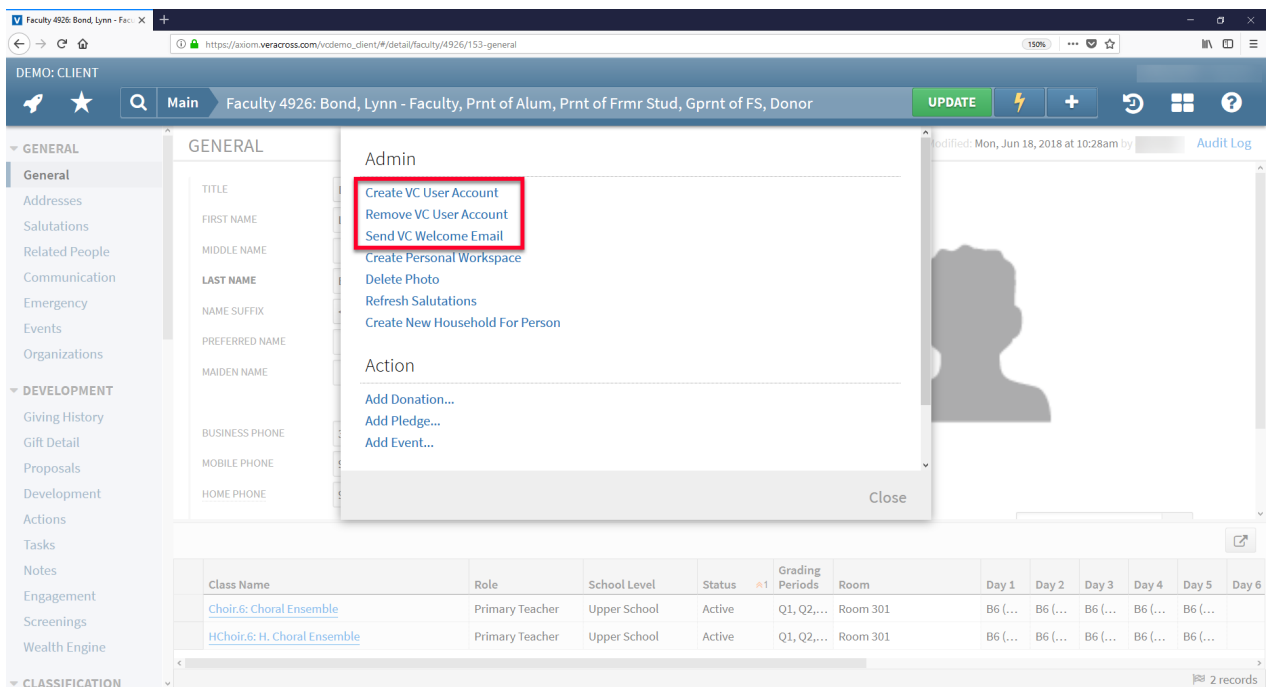
Here is the new version of this article in the [Veracross Community](#).

Overview

This documentation article is intended to provide an overview of the process for managing portal accounts. This will cover creating accounts for new users, disabling accounts, and removing accounts, as well as Active Directory integration.

Creating Portal Accounts

Staff/Faculty Accounts



The screenshot shows a web browser window displaying the Veracross Faculty Detail screen. The browser address bar shows the URL: https://axiom.veracross.com/vcdemo_client/#/detail/faculty/4926/153-general. The page title is "Faculty 4926: Bond, Lynn - Faculty, Prnt of Alum, Prnt of Frm Stud, Gprnt of FS, Donor". The page is divided into several sections: "GENERAL", "DEVELOPMENT", and "CLASSIFICATION". The "GENERAL" section is expanded, showing fields for TITLE, FIRST NAME, MIDDLE NAME, LAST NAME, NAME SUFFIX, PREFERRED NAME, MAIDEN NAME, BUSINESS PHONE, MOBILE PHONE, and HOME PHONE. The "Admin" menu is open, listing actions such as "Create VC User Account", "Remove VC User Account", "Send VC Welcome Email", "Create Personal Workspace", "Delete Photo", "Refresh Salutations", and "Create New Household For Person". The "Action" menu is also open, listing "Add Donation...", "Add Pledge...", and "Add Event...". The "Create VC User Account" option is highlighted with a red box. Below the detail screen, a table displays a list of records with columns for Class Name, Role, School Level, Status, Grading Periods, Room, and Day 1 through Day 6. The table shows two records for "Choir:6: Choral Ensemble" and "HChoir:6: H. Choral Ensemble".

Class Name	Role	School Level	Status	Grading Periods	Room	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Choir:6: Choral Ensemble	Primary Teacher	Upper School	Active	Q1, Q2,...	Room 301	B6 (...)	B6 (...)	B6 (...)	B6 (...)	B6 (...)	
HChoir:6: H. Choral Ensemble	Primary Teacher	Upper School	Active	Q1, Q2,...	Room 301	B6 (...)	B6 (...)	B6 (...)	B6 (...)	B6 (...)	

After the initial Teacher Portal launch, at any point when a new Staff/Faculty member enters the school, a user account can be created for them one-off on the person detail screen. On the System homepage, click the Action menu and select "Create VC User Account." When a staff/faculty user

account is created, the Veracross Person role will determine which “default” security role is assigned. For example, if a person has a role of Staff when their user account is created, the system will generate a default security role of Staff_1 for that person.

To send a welcome email to the new user, select “Send VC Welcome Email” from the same Action menu.

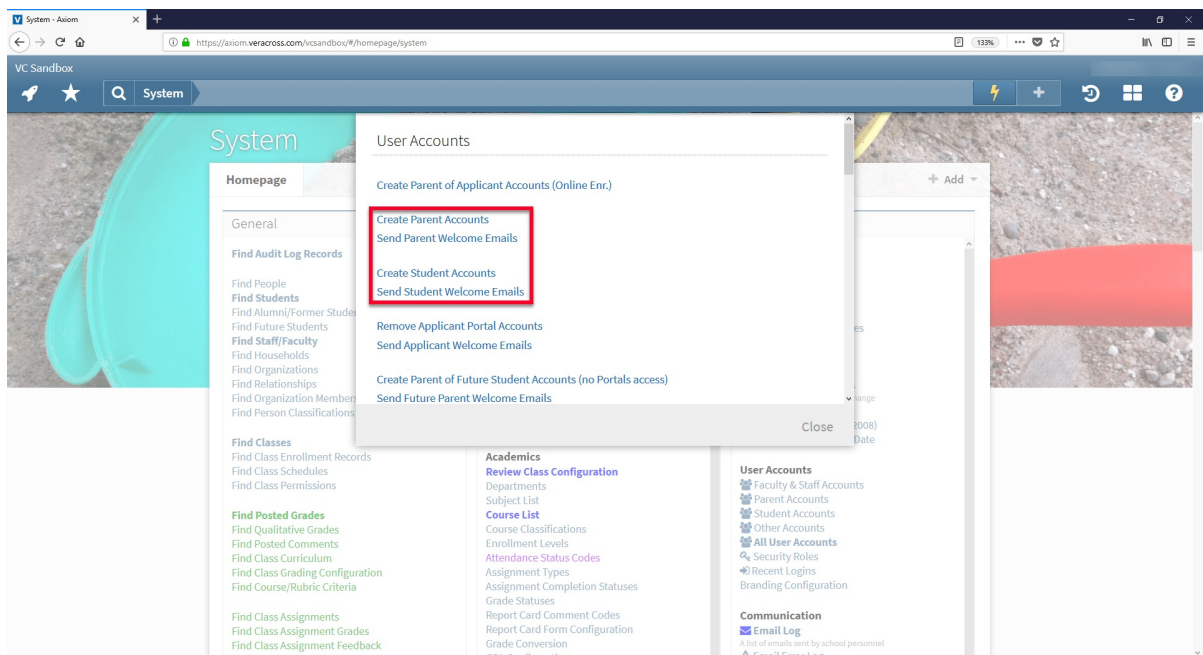
Parent/Student Accounts

Once the [Start School Year](#) procedure has been run, use the Action menu in Axiom to manage the creation of new Parent and Student accounts. Schools are free to start the school year whenever they would like. It is important to note that accounts will only be created for people with email addresses. People without email addresses will not receive an account until the night after their email address is entered.

After the first day of school, any new persons added to the system that have the proper role and criteria (custody if a parent, grade level if a student) will automatically have a user account created in the overnight process. Additionally, you can check the “Person Roles” query on the System Homepage and if there’s a checkmark in the “send VC Welcome email” box, welcome emails will be automatically sent to new parents and/or new students.

Follow the steps below to manage your Parent and Student portal in Veracross.

1. Review your school’s welcome email text(s) for students and parents to make sure that it is current. This is located via the “Email Templates” link on the your System Homepage.
- 2.



User accounts for new parents and students can be created after the Start School Year procedure has been run by running the “Create Parent Accounts” and “Create Student Accounts”

procedures from the Action menu on the System homepage. These procedures will create accounts for all new parents who have “portals access” on a relationship to a student as well as all students who are in a grade level for which the Student Portal is enabled. Remember that accounts will only be created for people with email addresses. In order for someone to have portals access automatically generated, the person must be a Father or Mother of a Student/Future Student and be in the same household as them. This process runs during the nightly scripts.

3. Both the project manager and the school should test several accounts before feeling confident about having the welcome email sent, even if you are simply ‘re-launching’ the portals for the new school year. In testing, the following settings within the system should be verified:
 1. Class Portal Visibility Settings
 2. Grading Period Portals Display
4. [See the grade visibility settings for portals for more details](#)
5. If any account usernames need to be changed, this should be done prior to sending welcome emails. To rename a portal username, run a Veracross User Accounts query from the System page. In the Security Detail column, click on the Security Admin link for the person whose username you would like to change. On the Person Security detail screen, type in a new username and click “Update Person Security” when finished.
6. Please do not plan to launch the portal on a Friday. Launching the portals is a very public activity and there should be people at the school available to answer questions and we should be available to respond to any issues that come up. Launching earlier in the week allows everyone to be more available to respond to any issues.
7. To send welcome emails to Parents and/or students, use the “Send Parent Welcome Emails” and “Send Student Welcome Emails” procedures Action menu on the System homepage. This will send a welcome email to all users with the Parent security role or the Student security role respectively. The email template they will receive is influenced by the email templates set on the Security Role configuration ([read more here](#)), for people that have not previously received a welcome email and are not disabled. The system looks for the Individual Event on the person record called “VC Welcome Email Sent” to determine whether or not someone has previously received a welcome email. If some Parent or Student users have more than one security role and haven’t previously received a welcome email, the template they receive will be determined based on security role precedence. You can view the list of users who will receive the welcome email by running the “Review Parent Accounts with no Welcome Email” and “Review Student Accounts with no Welcome Email” options on the Action menu on the System homepage.

It is important to note that the send welcome email procedures do not send emails to users who already received a welcome email, because this is logged as an Individual Event. It is possible to send welcome emails a second time to users, but it requires a workaround. If you want to send out an email

to all users, you can use a distribution list email and include instructions for people to use the Forgot Password function on the portals login page.

Future Students/Parents of Future Students

Much of the functionality of the portals is tied to the person roles of parent and student. We discourage schools from creating accounts during the middle of the summer for new students and parents. If you have a special circumstance, it is possible to create Future Student and Parent of Future Student user accounts, but these accounts will not have access to the Parent or Student portals. Please contact your account manager if you would like to find out more about creating accounts for Future Students and/or Parents of Future Students.

Disabling Portal Accounts

The security role “Portal_Account_Disabled” can be added to a person’s account to disable portal access, however this method has been deprecated in favor of the account status “Portals Login Disabled” that is managed on a user’s security admin detail screen. Portal access can also be disabled and enabled in batch for all students and parents via an Action menu item. [Read about both of these options here.](#)

Also, [read additional details about managing portal membership.](#)

Removing Portal Accounts

Parent/Student Accounts

Veracross user accounts for students (and their parents) who are either a) graduating or b) not returning will be removed when the Close School Year procedure is run.

During the school year, Parent and Student accounts will only be removed in the nightly process if their role of Parent or Student is lost, or if the Parent loses custody.

Staff/Faculty Accounts

Veracross user accounts for staff/faculty will be removed the night after you enter a termination date.

Active Directory

If you currently have Active Directory enabled and would like new accounts created in the appropriate format, please be sure that prior to creating any user accounts you verify the necessary security role primary and secondary username convention(s) via the Security Roles query on the System homepage to ensure the proper username format is used. Additionally, be sure that you have

all of the appropriate information communicated with Veracross for [active directory integration](#).

If you do not have Active Directory integration setup and would like to begin using Active Directory integration, there are several steps that need to happen prior to launching portals with this integration. Please follow the steps on the [active directory documentation](#) for specific details and talk with your Veracross Account Manager.

If your school is integrating with Active Directory, be aware that in order to guarantee unique usernames, we will append the school domain onto the end of the username (e.g. jon.doe@theschool.org) Users who use the portals do not need to be aware of this. They are able to log in using either jon.doe or jon.doe@theschool.org. Axiom users will always need to use the full username (e.g. jon.doe@theschool.org).

Note: It is entirely possible to create Active Directory logins for just staff members and/or students. Parents do not need to have Active Directory integration.

[Read the full documentation about active directory integration.](#)
