

# Creating User Accounts in Batch

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

---

To manage user accounts in batch, navigate to the System homepage in Axiom and click the Action menu. Only users with the security role of SysAdmin\_1 can create user accounts, send welcome emails and set security roles for their school using the Action menu.

### View All User Accounts

To see all accounts, click the "All User Accounts" query found on the System homepage.

## Parent Accounts

---

1. **Create Parent Accounts:** Creates user accounts for all new parents who have portal access on the relationship to a student. This is to be used for the first time launching the parent portal or to create accounts for new parents after the start school year procedure has been run.
2. **Create Parent of Applicant Accounts (Online En.)** This procedure finds people with the "parent of applicant" role who don't already have an account, but who have an email address and whose children are applying for either the current or active admissions year and have an application. It creates accounts for those parents and gives them the "parent of applicant" *security role*.
3. **Send Parent Welcome Emails:** Sends the VC\_Welcome\_PARENT email template to all parent accounts that have not previously received a welcome email (to avoid sending passwords over email). 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.

## Student Accounts

---

1. **Create Student Accounts:** Creates user accounts for all new students. This is to be used for the first time launching the student portal or to create accounts for new students after the start school year procedure has been run. This creates accounts only for students in grade levels that have Student Portal Enabled checked off on the [Grade Levels query](#).

2. **Send Student Welcome Emails:** Sends the VC\_Welcome\_STUDENT email template to all student accounts that have not previously received a welcome email (to avoid sending passwords over email). 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.

## Applicant Portal Accounts (if applicable)

---

1. **Remove Applicant Portal Accounts:** If the Applicant Portal is enabled, this procedure will remove all existing Applicant Portal accounts so you can start over for the upcoming admissions year.

## Future Student/Parent Accounts

---

1. **Create Parent of Future Student Accounts (no Portals access)** Creates user accounts for all Parents of Future Students. These user accounts will receive the Future Parent security role but do not have access to the Parent Portal. This can be used to create accounts before becoming Parents in VC for website integration or mail merge letters with user account information.
2. **Send Future Parent Welcome Emails:** Sends the VC Welcome FUTURE PARENT email template to all Future Parent user accounts. Note: This template is blank by default. This must be updated by the school to include the username and password merge fields and should include a note to the parents that they cannot login to Veracross (yet) with this account if the portals URL is included. If this welcome email is sent, the VC Welcome PARENT welcome email cannot be sent at a later date to the same users (to avoid sending passwords over email).
3. **Create Future Student Accounts (no Portals access)** Creates user accounts for all Future Students. These user accounts will receive the Future Student security role but do not have access to the Student Portal. This can be used to create accounts before becoming Students in VC for website integration or mail merge letters with user account information.
4. **Send Future Student Welcome Emails:** Sends the VC Welcome FUTURE STUDENT email template to all Future Student user accounts. Note: This template is blank by default. This must be updated by the school to include the username and password merge fields and should include a note to the students that they cannot login to Veracross (yet) with this account if the portals URL is included. If this welcome email is sent, the VC Welcome STUDENT welcome email cannot be sent at a later date to the same users (to avoid sending passwords over email).

## Alumni Portal Accounts (if applicable)

---

1. **Create Alumni Accounts:** Creates user accounts for all persons with the Alumni role and gives them the Alumni security role.
2. **Send Alumni Welcome Emails:** Sends the VC\_Welcome\_ALUMNI email template to all alumni accounts that have not previously received a welcome email. 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.

3. **Grant Seniors Alumni Portal Access:** Adds the Alumni security role to all current seniors to allow them access to the Alumni Portal. When the year ends and the user is no longer a student, the student security role will be removed and the alumni security will remain. This means the user account will keep the same username and password.

## Staff/Faculty Accounts

---

1. **Create Staff Accounts:** Creates user accounts for all persons with the Staff role. The user accounts will automatically receive the Staff\_1 security role.
2. **Create Faculty Accounts:** Creates user accounts for all persons with the Faculty role. The user accounts will automatically receive the Faculty\_1 security role.
  - o For performance reasons, client users are unable to run the above two procedures themselves. Veracross support services can batch create staff or faculty user accounts if needed. Consider the number of accounts; if it's a handful, it may make the most sense for you to create the needed user accounts individually.
3. **Send Staff Welcome Emails:** Sends the VC\_Welcome\_STAFF email template to all staff accounts that have not previously received a welcome email. 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.
4. **Send Faculty Welcome Emails:** Sends the VC\_Welcome\_FACULTY email template to all faculty accounts that have not previously received a welcome email. 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.

## Enabling/Disabling Parent and Student Accounts

---

1. **System Homepage Action Menu Item: Disable Parent/Student Portal Access** Updates user account status for parents and students to "Portals Logins Disabled." This is often done in the summer to prevent parents from seeing scheduling items before they are finalized.
2. **System Homepage Action Menu Item: Re-Enable Parent/Student Portal Access** Updates user account status for parents and students to "Enabled."

## Remove Old User Accounts

---

1. **Remove Old User Accounts:** Removes user accounts by performing the following actions in the following order:
  1. Removes **Future Parent** security role from users who have the Parent role
  2. Removes **Future Student** security role from current students
  3. Removes **Alumni** security role if user isn't a student, past student, or alumni
  4. Removes **Applicant** security role if the user isn't an applicant, prospect, or former applicant

5. Removes the **Parent of Applicant** security role if user doesn't have custody or Admissions Portal access of a prospect, applicant, or future student
  6. Removes **Staff** or **Faculty** security role if the user doesn't have the faculty or staff person role
  7. **After** these steps are done, removes user accounts for all people without security roles who are NOT: students, future students, parents of future students, coaches, staff, faculty, future program students, or program students.
-