

# Portal Membership Management

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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

Determining which users are members of which portals is usually a matter of initial configuration. For instance, when launching a parent portal for the first time, Veracross engineers include logic to make all parents members of the parent portal. Between school years –but also, on occasion, throughout the year – portal membership needs to be managed. Many aspects of portal membership are accomplished automatically by the system, but some things – removing members, for instance – needs to be done manually. This article covers how portal membership is determined and managed and includes some tips and workflows for smoothly doing so through the school year.

## Membership Strategy

The screenshot shows the Veracross Portal Management interface for a "Parent Portal". The interface is divided into several sections: General, Design, Home Screen, and Membership. The Membership section is highlighted with a red box and contains the following configuration:

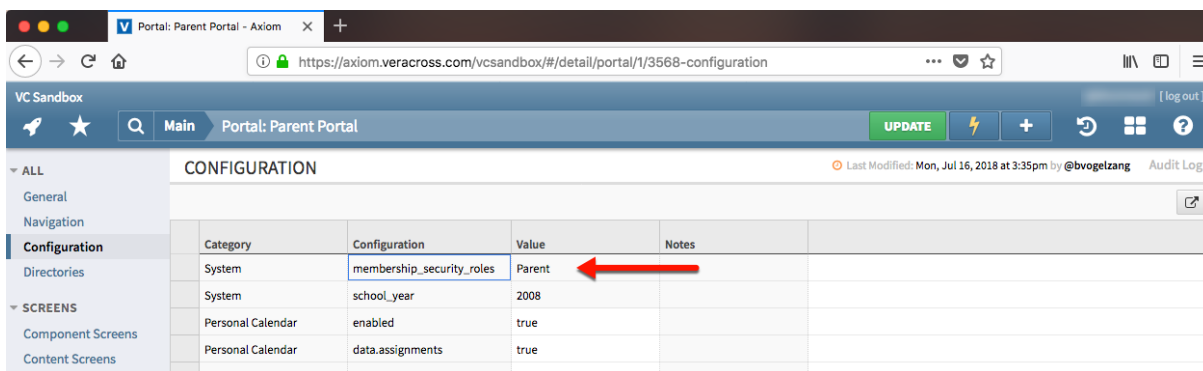
Field	Value
MEMBERSHIP STRATEGY	Security Roles
STATUS DEFAULT	Default - Disabled
PORTAL TYPE	Current Parent

The interface also shows a sidebar with navigation options: General, Navigation, Configuration, Directories, SCREENS (Component Screens, Content Screens), PERMISSIONS (Admins), and MEMBERS (Enabled, Disabled, Strategy Mismatch, Manually Added). The top navigation bar includes a search icon, a star icon, and a "Main" button. The top right corner has an "UPDATE" button and a "log out" link. The bottom right corner shows the last modified date: "Mon, Jul 16, 2018 at 3:35pm by @bvogelzang" and an "Audit Log" link.

The Membership Strategy and Status Default fields determine how people are automatically added to portals. Find them on the **General** tab of a portal detail screen in the **Membership** section.

**Membership Strategy:** Membership strategy determines who is added automatically as a member to that particular portal. There are two primary values for this field:

- **Security Roles:** Membership is based on security roles, e.g., any person with the Parent security role is automatically added to the Parent Portal. This option is used in the vast majority of portals. The security role(s) being used may be found in the membership\_security\_roles field on the Configuration tab of the portal detail screen.



- **Manual:** Members need to be added manually using the “Add Record...” button in the the Members tab on the portal detail screen.

*Note: There is a “custom” option as well, but it is only relevant in a small number of use cases.*

View the membership strategy for a given portal on the General tab of the portal detail screen in Axiom. It is read-only and can only be updated by Veracross, which is typically done when the portal is initially set up.

**Status Default:** Determines what status (enabled or disabled) a person has when they are automatically added to the portal as a member according to the membership strategy.

A school may want to set this to Default – Disabled if they want to control exactly when new members are added to a given portal. Setting this field to Default – Enabled means in conjunction with the Security Roles membership strategy means that as soon as a person gets the relevant security role, they are immediately added to the appropriate portal.

## Strategy Match and Membership Type

Person	Username	Status	Portal Platform	Primary Portal	Strategy Match	Membership Type	Security Roles	Roles
<a href="#">Abbott, Alexander</a>	<a href="#">alexander.abbott</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Coach, Donor, Subst
<a href="#">Abbott, Beth</a>		Enabled	Version 2	N/A	Yes	System Generated	Parent	Coach, Parent, Prnt
<a href="#">Abbott, Bruce</a>	<a href="#">bruce.abbott</a>	Enabled	Version 3 Tester	N/A	Yes	Manually Added	Parent	Alum, Parent, Prnt o
<a href="#">Abbott, Cindy</a>	<a href="#">cabbott2</a>	Enabled	Version 2	N/A	Yes	System Generated	Staff_1, Parent, Grades_Re...	Staff, Parent, Prnt of
<a href="#">Abbott, Dana</a>	<a href="#">dana.abbott2</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Staff, Parent, Prnt of
<a href="#">Abbott, Kevin</a>	<a href="#">vc.demo.parent</a>	Enabled	Version 3 Tester	N/A	Yes	Manually Added	Parent, Alumni	Alum, Parent, Prnt o
<a href="#">Abjade, Olalekan</a>	<a href="#">oabjade</a>	Enabled	Version 2	N/A	Yes	System Generated	Staff_1, Parent	Staff, Parent
<a href="#">Absuge, Shueb</a>	<a href="#">shueb.absuge</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Parent
<a href="#">Accime, Fritznel</a>	<a href="#">fritznel.accime</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Parent
<a href="#">Acosta, Eddy</a>	<a href="#">eddy.acosta</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Parent, Vol
<a href="#">Acosta, Frances</a>	<a href="#">frances.acosta</a>	Enabled	Version 2	N/A	Yes	System Generated	Parent	Parent

Each member of a portal has a strategy match and membership type.

- **Strategy Match:** Determined by whether that person matches the membership strategy of the portal. For instance, in a Student Portal with a security role strategy, any members of the portal with the Student security role would indicate “Yes” for strategy match. Note that some people in a portal may be a “strategy mismatch” (Strategy Match = No) but still be members. Members are not automatically removed (see below).
- **Membership Type:** Members added automatically are indicated with “System Generated,” for example, parents added to the Parent Portal by virtue of their security role. Members added manually (by clicking “Add Record...”) are indicated by “Manually Added.”

## Adding Members to Portals

Portal members can be added automatically or manually. Members added automatically (by virtue of their match with the membership strategy) are added as either enabled or disabled based on the **Status Default** field on the General tab of the portal detail screen.

**Automatically Adding Members:** A person can be automatically added to a given portal in one of three ways:

- **Via a nightly script:** Every night, a script looks at each portal’s membership strategy and adds any people who match the strategy.
- **Via the “Refresh Portal Membership” procedure:** Available on the Action menu for each portal, this procedure runs the same script that runs nightly.
- **Via a security role trigger:** When a new security role matching a portal’s membership strategy is added to a person, that person is automatically added as a member to the relevant portal.

The security role trigger only functions when a security role is *added*. Removing a security role does

not trigger membership removal. Removing a Parent security role, for instance, would trigger a strategy mismatch that would then need to be resolved manually.

**Manually Adding Members:** To manually add a member, click **Add Record...** on the Members – Enabled or Members – Disabled tab. Members can be manually added to a portal regardless of the membership strategy. For example, a non-parent could be added to a parent portal with a security role (not manual) membership strategy.

If a user already has Faculty portal access, but then has a child enroll in the school, the Parent role will not be automatically applied to the user until the first day of school. If the user requires access to the Parent Portal prior to the first day of school, the security role must be added manually.

## Revoking Portal Access From Individuals

Veracross never automatically removes or disables portal members.

- To disable them, flip their status to “Disabled,” at which point they will be moved to the Members – Disabled tab of the portal detail screen.
- To remove them, click the red X to completely remove them from the portal.

If a person is removed from a portal (not simply disabled) and they match the membership strategy, they will be automatically added back in the nightly script. For example, if a parent is removed from the Parent Portal but they retain their Parent security role, they will be automatically added back in the nightly script.

**Disabling or enabling a portal member can take up to an hour to take effect if the portal user is logged in.** Logging out and logging in by the portal member applies the change immediately.

Example: A parent is currently logged into the Parent Portal. In Axiom, an administrator changes their status to “Disabled” and clicks Update, moving the parent to the “Members – Disabled” tab in the portal detail screen. Until the parent logs out, though, they will continue to be able to navigate in the portal for up to an hour.

## Removing Members From Portals Via Action Menu

After the school year closes, portal membership management becomes more pressing. Newly-minted alumni and former students – along with their parents – will likely become strategy mismatches (i.e., they no longer have the relevant security role for their respective portal) and schools will often want to remove their access.

Veracross never removes people automatically added (via membership strategy) to portals, so there

are several Action menu items to aid in this process. Specifically, there are three Action menu items available on each portal detail screen that can be used after a school year is closed to revoke portal access:

- **Disable Members with Strategy Mismatch:** Switches the status of any strategy mismatched members to “Disabled,” but does not remove them from the portal.
- **Remove Members with Strategy Mismatch:** Deletes any strategy mismatched members completely from the portal.
- **Remove All Disabled Portal Members:** Deletes all members (both automatically and manually added) from the portal.

Schools may choose to run either of the first two procedures. Disabling members with strategy mismatch has the advantage of preserving the membership, which could then be re-enabled if needed, whereas removing members with a strategy mismatch does not preserve the record that they were ever members, and makes re-adding a member take a few more steps. Schools may wish to remove all disabled portal members to keep that list “clean,” or they may wish to never run it to keep a running list of everyone who has ever had access to the portal.

## Additional Ways to Disable Portal Access

Portal access can be disabled and enabled directly from user accounts and security roles as well, separately from the portal-specific logic detailed above.

- Enable and disable portal access directly on users’ security admin detail screens, as well as in batch for all student/parent accounts. [Read about that here.](#)
- Add the “portal\_account\_disabled” security role. This method has been deprecated, though, by enabling and disabling account access as detailed in the above article.

## End of School Year Procedures

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Schools mostly need to consider portal membership after a school year closes, creating oftentimes numerous strategy mismatches in portals. To remove members who no longer match the portal strategy (e.g., alumni and former students who should no longer have access to the Student Portal), navigate to the relevant portal and run the **Disable (or Remove) Members with Strategy Mismatch** Action menu item.

The procedure needs to be run (or considered) for each portal.

The **Roll School Year Forward** Action menu item can be run at any time before or after portal membership is cleaned up. They are often run around the same time, but do not depend on each other. [Read more about this procedure.](#)

