

Launching the Teacher Portal

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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

Launching the Teacher Portal is a significant event for the school and for Veracross. It requires a lot of preparation and training by multiple parties. This article is intended to provide an overview of the process for launching the portals, as well as some instructions and clarifications.

When to launch the Teacher Portal

1. If you have recently completed the initial implementation of Veracross, it is important to ensure the completeness and accuracy of class and teacher data prior to launching the portals. Data accuracy improves the initial experience for teachers.
2. A major factor for launching the Teacher Portal will be training for your faculty members. Training should be scheduled for each division to walk through the functionality in the Veracross Teacher Portal specific to the needs of each faculty group. Be sure to consider the time it will take for teachers to become familiar with the Teacher Portal in determining training dates. Also, consider the launch date of the Parent and Student Portals: it is important to have Teachers in the system prior to Parents and Students so that data is accurate and updated by the time Parents and Students log in. Some schools have found it useful to hide class information for a period of time to allow their teachers to become familiar with Veracross prior to granting access to parents and students. See the [full documentation](#) for more details on Class Portal Visibility Settings and Grading Period Portals Display.
3. Finally, schools should carefully consider security options surrounding the visibility of assignments, assignment grades, and final grades for classes and who should make these decisions (e.g. administrators, teachers, department heads).

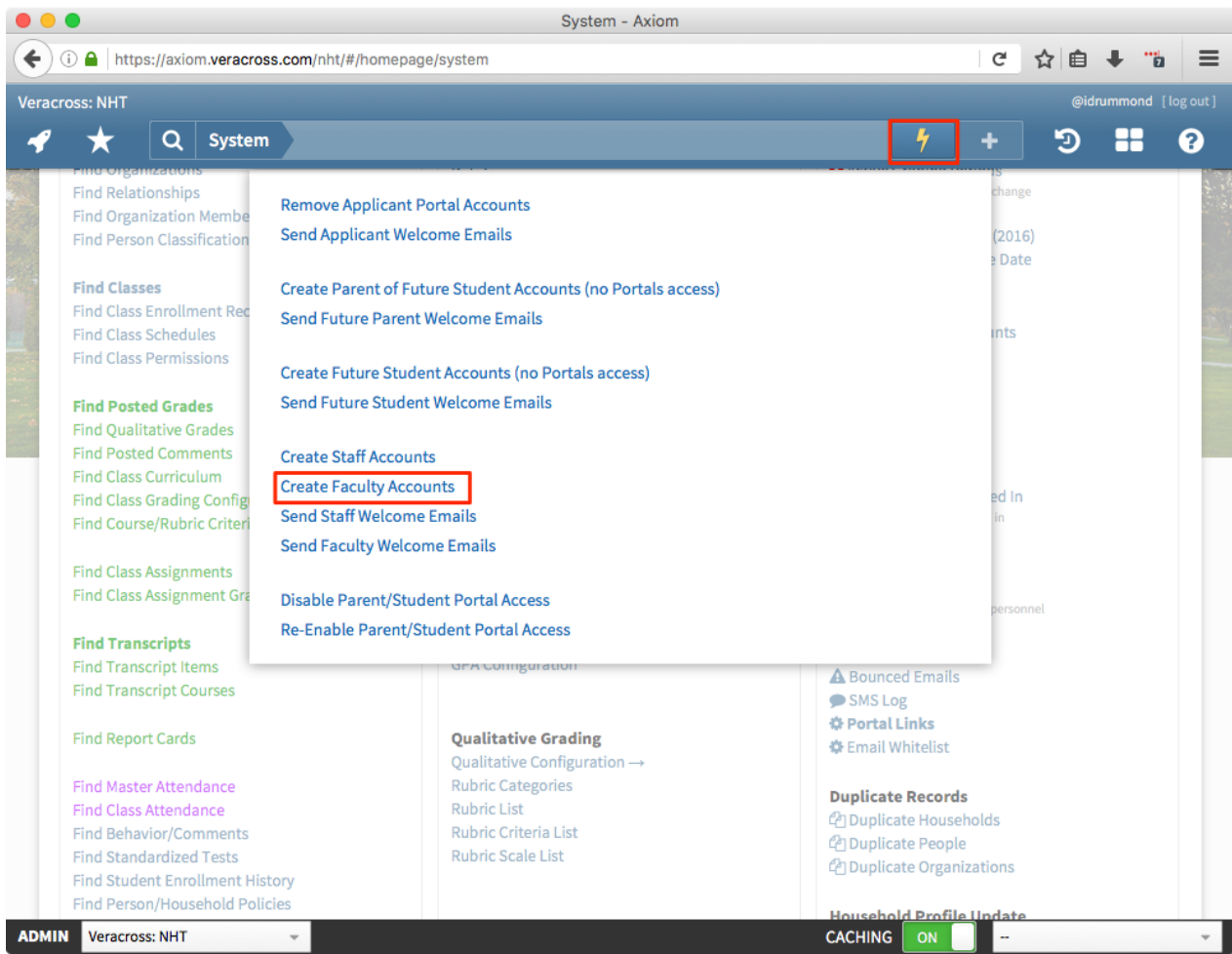
General Guidelines

The basic process for the portal launch involves gathering requirements, creating accounts, testing accounts, and sending welcome emails. Key to the success of the process is coordination between the

school, the project manager, the engineer, and others. The following lists detail the main areas of concern.

Creating Accounts

1. 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. Alternatively, schools can create accounts for these people and communicate their login information to them either by phone or mail.
2. Between creating accounts and notifying users of their accounts via the welcome email, the Veracross Project Manager and School Project Manager should test multiple accounts before feeling confident about having the welcome email sent to users. In testing, the following settings within the system should be verified.
 1. Class Portal Visibility Settings
 2. Grading Period Portals Display
3. 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.
4. Welcome emails should not be sent on Friday. Sending welcome emails earlier in the week allows everyone to be more available to respond to any issues and answer questions that may arise.
5. We assume that the Veracross portals are desired as-is (i.e. no additional customizations). If customizations are desired, a specification will need to be drawn up and approved before agreeing to any firm commitments and deadlines.



- Customize the Faculty Welcome Email Template (found via the “Email Templates” link on the System Homepage).
- Send a list of faculty/staff names and job titles. We will use the job titles in order to determine the best approximate security roles for each user. The security roles can be changed by the school after the accounts are created, but we like to take a first pass at assigning them.
- Verify the Faculty security role primary and secondary username convention via the Security Roles query on the System homepage to ensure the proper username format is used.
- Run the “Create Faculty Accounts” procedure from the Action menu on the System homepage. This will create user accounts for all persons who have a role of Faculty.
- Test the teacher portal (both the Veracross Project Manager and School Project Manager).
 - Test as both a “pure” teacher as well as a teacher who is also a parent.
 - Confirm the portal visibility settings per class and per grading period.
 - Verify whether Behavior Events will be added by teachers (this link can be disabled if needed).
- Run the “Send Faculty Welcome Emails” procedure from the Action menu on the System homepage. This will send 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. To show the list of users who will receive the welcome

email, run the Veracross User Accounts query for Faculty user accounts, and set criteria on the “VC Welcome Email Sent” field to “is blank”. This will display all accounts that have no date in the field.

Active Directory Integration/Custom Usernames

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. Do this via the Security Roles query on the System homepage to ensure the proper username format is used. Ensure that you have all of the appropriate information communicated with Veracross for [active directory integration](#).

If you do not have Active Directory integration set up, and would like to begin using it, there are several steps that need to occur 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). Note that 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](#)

Web Provider Integration

The Veracross portals do not require a front-end website integration as they are completely sufficient to stand on their own to serve your school’s needs, including school news, class websites, calendars, family directory, etc. However, if you would like to discuss integration regarding your front-end website, please contact your Account Manager for further information.
