

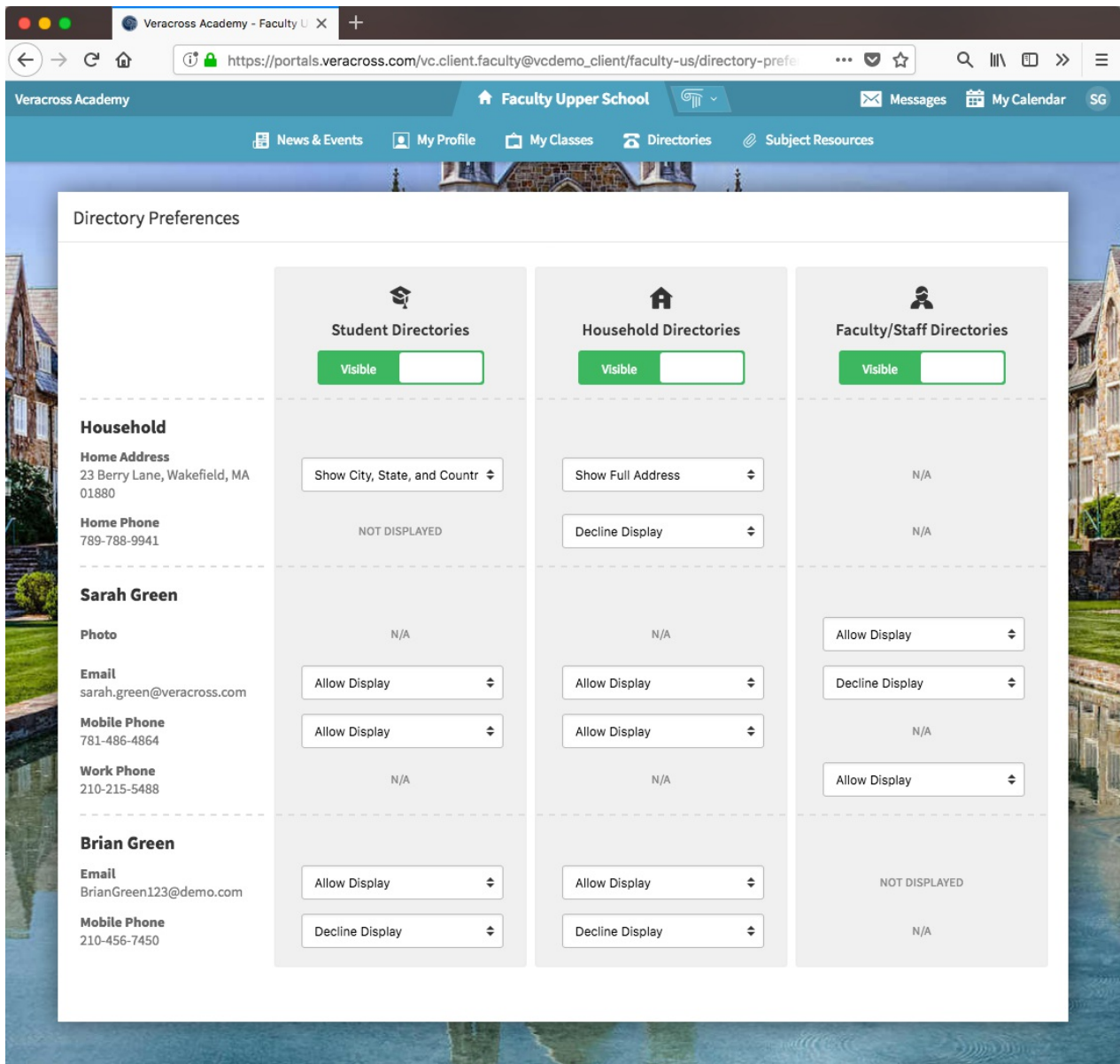
Directory Preferences Overview

Updated Jul 14, 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



Portals users have significant flexibility in updating their own directory preferences, meaning that they can decide what information about themselves they want to be displayed in directories of the

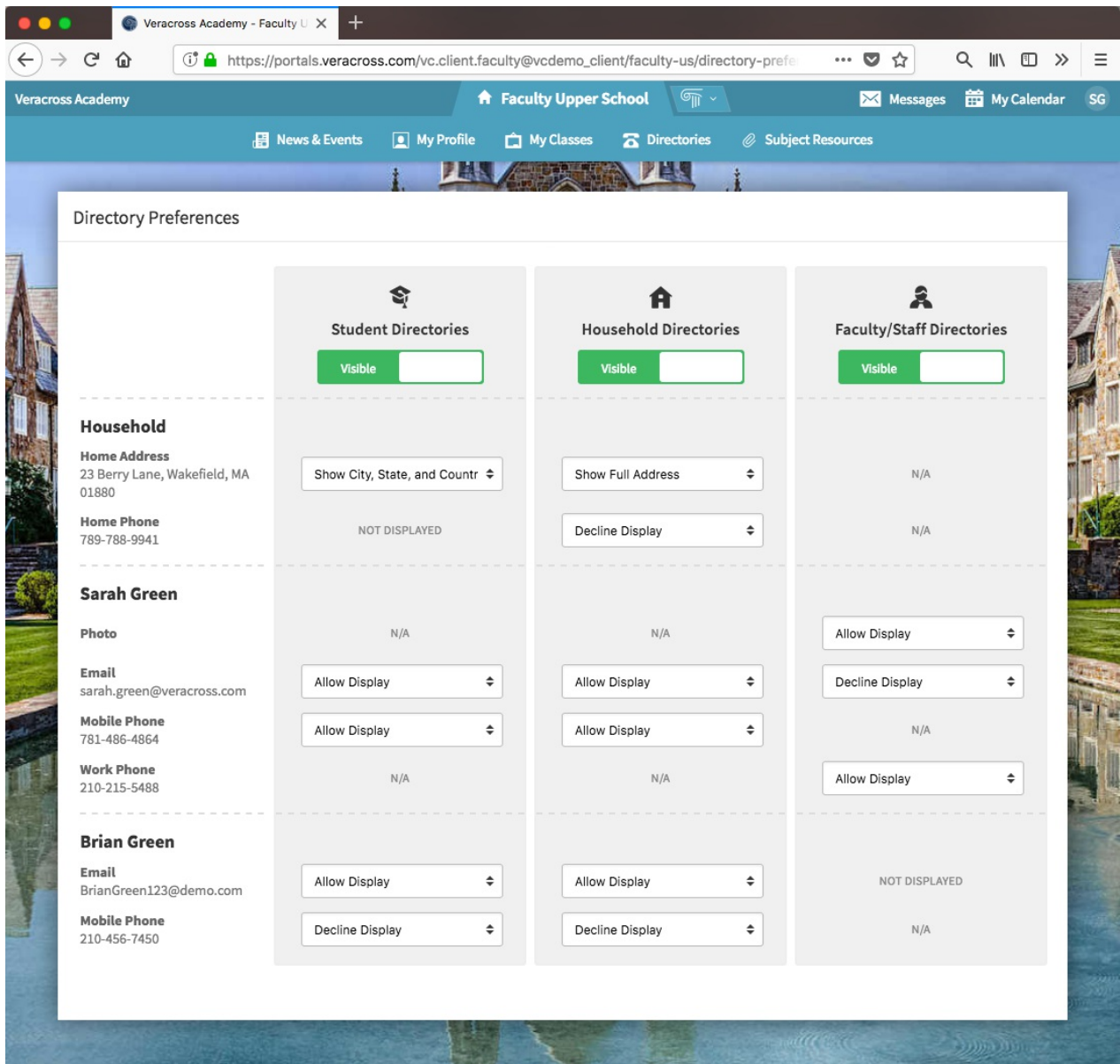
Student, Household, and Faculty/Staff directory types, choosing to display the same information across all types or to display information differently (or not at all) in certain ones. The user interface in the portals is a grid, visually grouping directory preference fields by household and primary adults for each directory type in which they may be listed. Only fields relevant to the user and directory type can be updated, removing any guesswork on the user's end about which preferences can or cannot be updated. Directory preferences are created during the nightly scripts after a person is given a role that would be associated with a directory, such as Student, Parent, or Staff/Faculty.

Note on Upgrading From Legacy Preferences

These features are enabled as of February 22, 2018. Though the interface is significantly updated, no immediate action is required from schools:

- Portal users will find a link to access the new Directory Preferences 2.0 interface within the HPU in place of the old legacy preference update cards.
- The new Directory Preferences page can be accessed natively within Portals as a tab in the Household Profile section and as a separate standalone page that schools can link directly to via a new portal shortcut link {system:directory_preferences}.
- The API has been updated to honor the new and more-granular directory preference infrastructure and it will not break existing functionality.

Directory Preferences Page in Portals



The Directory Preferences page in Portals presents a grid interface for each person and relevant directory type. Each column is a directory type (Student, Student Household, and Faculty/Staff); only ones relevant to the current user are displayed. The rows are the household and parents of the currently logged-in user, and so preferences can be specified for each household/person in each directory type.

Users can opt to display fields in one way in directories of one directory type and in another way in another. Users can even choose to hide themselves and their household from all directories of a directory type as well.

Responsive, User-centric Design

The Directory Preferences page is optimized for display on a screen of any size, including on mobile devices. No “Save” button is required, as all updates are made immediately, and no changes require approval. Only fields that are relevant to the user and the directory type will be displayed.

Preferences for a Directory Type (the “directory type columns”) only display if the primary adults or household is featured in directories of that Directory Type. For instance:

- Photos of the parents are not a part of the Student Directory Type entry, so the dropdown element to configure that preference for that directory type is omitted.
- The entire “photo” row is omitted for parents who are not a faculty or staff member.
- For example, the column for the Faculty/Staff Directory Type preference settings would only display if the logged-in parent or spouse was also faculty or staff member (and thus potentially able to be featured in a directory of the Faculty/Staff Directory Type).

The screenshot above displays the Directory Preference page for logged-in user who is a parent and a faculty member (Sarah Green). Thus, all three Directory Type columns and respective preference settings are visible.

- Fields read “N/A” that do not apply to that particular person/household in a given directory type. In the screenshot here, for instance, households do not display in directories of the Faculty/Staff type, so the options are all “N/A.”
- Fields read “Not Displayed” if those pieces of information are not configured to be displayed by the school.

Changes made in the portals are immediately reflected in the directories.

Directory Preferences Access From the HPU

Portal users will find a link to access the new Directory Preferences 2.0 interface within the Directory Preferences section in the Household Profile Update (HPU).

Directory Preference Access From Axiom

The interface designed for constituents to update their directory preferences is uniquely designed for the Portals experience, so a link is provided in Axiom via a secure token. To access directory preferences per directory type, navigate to the **Portal Admin** homepage, scroll down, and select the desired **Directory Type** (Student, Student Household, Faculty & Staff).

Household and Person Preferences Tabs

ID	Household Name	Household Head	Household Spouse	Related Students	Visible	Home Address Display	Home Phone Display	Update Preferences
3563	Abbott	Jorge Abbott			Visible	Show Full Address	Allow Display	Click to update preferences...
13563	Abbott	Dana Abbott		Alexander Adkins (5), John A...	Visible	Show Full Address	Allow Display	Click to update preferences...
24563	Abbott	Cindy Abbott		Aaron Abbott (2)	Visible	Show Full Address	Allow Display	Click to update preferences...
27563	Abbott	Sheila Abbott		Robert Ogden, Sheila Abbot...	Visible	Show Full Address	Allow Display	Click to update preferences...
31563	Abbott				Visible	Show Full Address	Allow Display	Click to update preferences...
32575	Abdi	Layla Addani		Jenny Abdi (6)	Visible	Show Full Address	Allow Display	Click to update preferences...
32615	Abdullahi	Fakhir Mohamed		Abdigani Abdullahi (6)	Visible	Show Full Address	Allow Display	Click to update preferences...
32752	Abdullahi	Fakhir Mohamed		James Abdullahi (6)	Visible	Show Full Address	Allow Display	Click to update preferences...
32826	Abunar	Sofia Abubakar		Habib Abunar (6)	Visible	Show Full Address	Allow Display	Click to update preferences...
32768	Accime	Fritznel Accime	Gloria Daniels	Joshua Accime (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32686	Acevedo	Brigida Marcano		Sanya Acevedo (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32963	Acevedo	Felicita Ruiz		Gerie Acevedo (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32621	Acosta	Eddy Acosta	Wonda Lara	Estophenberg Acosta (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32949	Adams	Alicia Cruz		Alyjah Adams (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32901	Adams	Linda Bryant		Dasha Adams (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
14716	Adkins	Sean Adkins		Barry Adkins (K), Mo Adkins ...	Visible	Show Full Address	Allow Display	Click to update preferences...
2716	Adkins	Rick Adkins	Connie Adkins	Patrick Johnson (12)	Visible	Show Full Address	Allow Display	Click to update preferences...
32793	Ahearn	Kelly Ahearn		Emiliy Ahearn (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32560	Aime	Rosemarie Aime		David Aime (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
26774	Albert	Thomas Albert	Sarah Albert	Denise Albert (K), Jane Alber...	Visible	Show Full Address	Allow Display	Click to update preferences...
15079	Alexander	John Alexander	Betty Alexander	Carolyn Alexander (1), Denni...	Visible	Show Full Address	Allow Display	Click to update preferences...
32957	Alexander	Charlene Rose		TreVaun Alexander (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
32900	Alexis			Thaddeus Alexis (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
15775	Alford	Alex Alford	Betty Alford	Maureen Alford (11)	Visible	Show Full Address	Allow Display	Click to update preferences...
15562	Ali	Brad Ali	Kathleen Daniels	Stephanie Ali-Daniels (8)	Visible	Show Full Address	Allow Display	Click to update preferences...
27562	Ali	Todd Ali	Renee Ali	Bonnie Ali (2), Ralph Ali (PK)	Visible	Show Full Address	Allow Display	Click to update preferences...
3562	Ali	Craig Ali		Bruce Finch (12)	Visible	Show Full Address	Allow Display	Click to update preferences...
9562	Ali	Phil Ali	Joyce Ali	Connie Jones (7)	Visible	Show Full Address	Allow Display	Click to update preferences...
15020	Allen	Denise Allen		Debbie Allen (2)	Visible	Show Full Address	Allow Display	Click to update preferences...

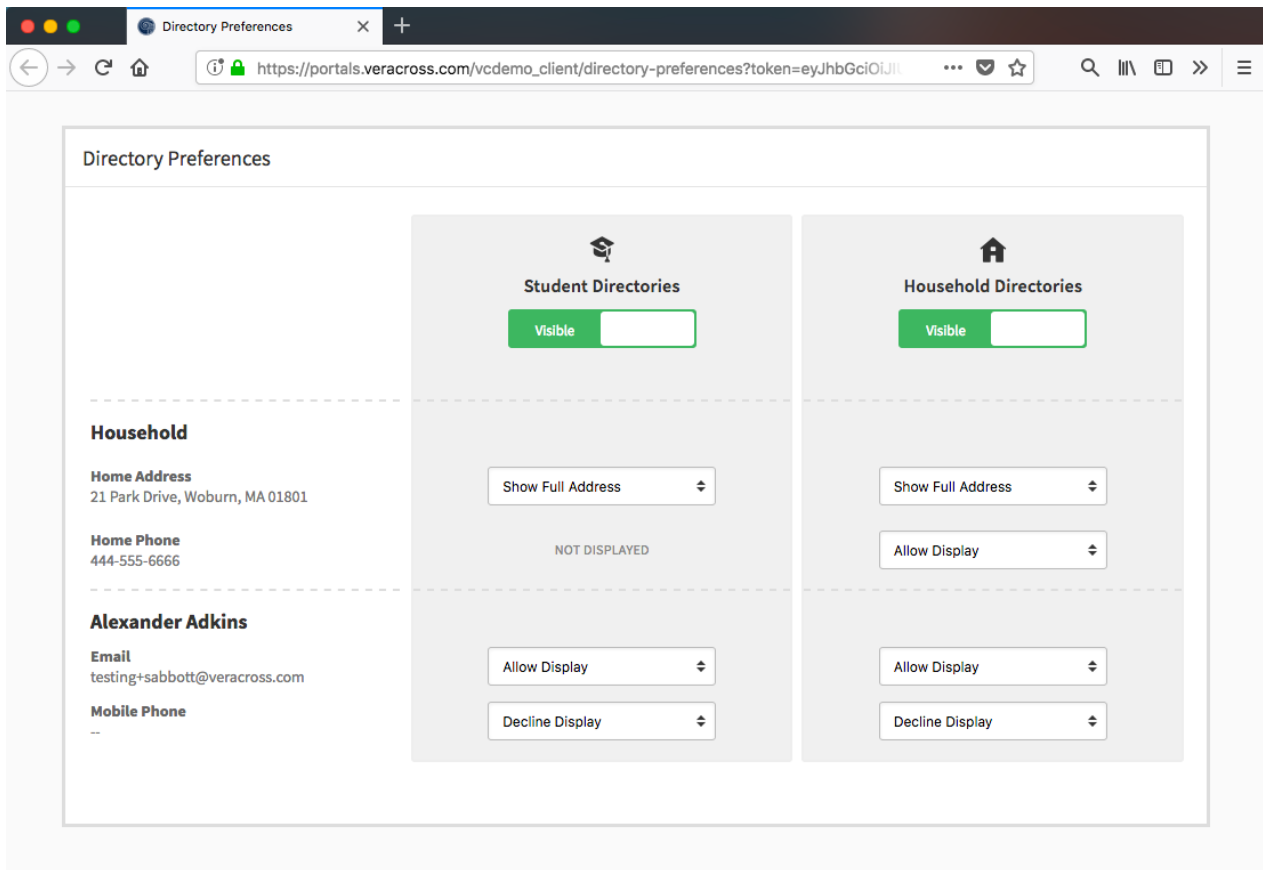
There are two tabs on the Directory Type detail screen: Household Preferences and Person Preferences. They display the household and person directory preferences — respectively — for all members of that directory type.

Because the portals interface better lends itself to the complexity of directory preferences than Axiom, a link is provided directly to the Portals for updating.

Who Has Household Directory Preferences?

In order for an individual to have Directory Preferences for a Household, the system first looks at potential Directory members, and then draws out a relationship tree from there. As an example, John Smith is a student in the student directory. John Smith is a member of the Smith Household, so, the Head of the Household (i.e., resident household parent 1) would have directory preferences, as well as their spouse (resident household parent 2). Directory preferences will only be generated for parents with legal custody, and only two households are able to have directory preferences for a single student (one resident and one non-resident, but both with legal custody).

Accessing Directory Preferences Via Secure Token



To update a constituent’s directory preferences from Axiom, click the “Update Preferences” link which takes the Axiom user to a Directory Preferences update page outside of the normal Portals via secure token. Make the updates there. To make the changes immediately available in the Portals Directories, run the “Refresh Directory Member Preferences” Action menu item on the Directory Type detail screen.

Portal Admin Action Menu Options

The Action Menu has three commands on the Action Menu to force updates to be reflected in directories immediately rather than waiting for the overnight scripts:

- Refresh Directory Entries: Update if information about a person (e.g., household address or mobile phone number) has changed in Axiom or a configuration option is updated (e.g, how first name is formatted or showing a phone number field).
- Refresh Dynamic Membership: If a new person is added who would be a member of a dynamic directory, run this procedure to add them.
- Create Missing Directory Member Preferences: Create directory preferences for new members of a directory type, e.g., for a new staff member in the Faculty/Staff directory type.

Directory Preference Queries

Two queries are available on the System homepage to find directory preferences:

- Find Person Directory Preferences
- Find Household Directory Preferences

Both queries include the Directory Type field for easy filtering. The individual fields (Photo Display, Email Display, etc.) are read-only. Use the “Update Preferences” link to make changes (via a secure token) to the preferences.

Directory Preference Staff Security

Directory preferences can be viewed by all staff members who can access person detail screens, but can only be changed by the following security roles:

- Division_Head_1
- Division_Head_2
- Division_head_3

Deleting Directory Preferences

A person’s directory preferences will never be deleted automatically, due to the potential loss of valuable data based on role changes and CRM. Sometimes, a school will want to delete a person’s directory preferences for one reason or another. *Before deleting any directory preferences, be sure to carefully consider the potential loss of data by doing so.*

Directory preferences may be batch deleted from any query on the Person Directory Type Preference table. Be sure that these preferences are deleted deliberately and that a good amount of thought is placed on which preferences are being deleted. If a person is marked as deceased, their directory preferences will be automatically removed.

Directory Preferences via API

To maintain backward compatibility, these directory type specific preferences are used to populate the single set of preferences available in the person and household centric API feeds.

Precedence is used to determine which preferences are used when multiple sets exist.

In preference order:

1. Faculty/Staff Directory Type Preferences
2. Student Directory Type Preferences
3. (Old) Person Preferences

This means for example if a family has filled out a set of Faculty/Staff Directory Type Preferences, and different Student Directory Type Preferences, that the API will preference the Faculty/Staff

Directory Type Preference settings.

Class Directories

Class directories honor the directory preferences and always reflect current enrollment data. They can be printed directly from the Class Website in the Portal and also are accessible from the General tab of a class detail screen in Axiom.
