

New Directory Configuration

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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

There are several directories provided in the default configuration – e.g., “Students by Grade Level” – but you may want to create additional ones to display in your parents, teacher, or student portals. This article details a workflow for creating a new directory of lower school students. The basic process is:

1. Create a new directory category.
2. Create a new directory within that category.
3. Select which portal(s) in which the directory should appear.
4. Set dynamic criteria to determine who should appear in the directory (e.g., lower school students).
5. Refresh the directory (or wait for the overnight scripts to run).

Custom directories created through this process are based only on Students within the specified groups; they can not be made around parent info or faculty info, for example.

Video of the Process

This video illustrates the process:

Step-by-Step

The following are step-by-step directions following the video.

Creating a New Directory Category

1. On the Portal Admin homepage, click into the directory type that the category should be made in.
2. Click the "Categories" tab on the left side of the screen, then click the "Add Record..." button.
3. Type in the name of the Category in the "Category" column and then click Update to create the category.

Creating a New Directory

1. On the Portal Admin Page, click into the directory type that the directory should be made in.
2. Click the "Categories" tab on the left side of the screen, then click the Directory Category the new directory will be a part of.
3. Click the "Add Record..." button, type in the name of the Directory you would like to create in the "Directory" column, and click Update to create the directory.

Configuring a Directory

Which Portal Should this Directory Appear in?

1. From the directory record, click into the Portals tab on the left side of the screen.
2. To add portals that this directory should appear in, click on one or more of the options in the Available Portals column. This will move the selected option to the Active Portals column and display a green plus next to it.
3. To remove directories that this directory should appear in, click on one or more of the options in the Active Portals column. If it is set to be removed, a red minus icon will appear next to the option.
4. Click Update.

Who Should Appear in this Directory?

1. From the directory record, click on the Dynamic Criteria tab on the left side of the screen.
2. To add a Dynamic Criteria to this directory, click the Add Record button.

3. Set the criteria in the input grid. Criteria options are as follows:
 - **Criteria Group:** Used to differentiate between different groups of criteria. Criteria within the same group are separated by AND; criteria in different groups are separated by OR.
 - **Criteria Category:** Options here are role, campus, school level, grade level, student group, resident status, gender, homeroom, advisor, or profile code.
 - **Operator Type:** Choose between Include or Exclude for this particular criteria.
 - **Criteria Value:** Options here are based upon the Criteria Category. For example, if the Criteria Category is Gender, the Criteria Value options are Female and Male.
 4. Once criteria are applied, click the Update button.
 5. After new criteria are applied to a directory, membership must be refreshed. Click the Action Menu, select Refresh Dynamic Directory Membership, and then click the green Refresh Dynamic Directory Membership button. Refresh the browser to see the updated counts. Note that this forces a procedure to run that would run in the overnight scripts.
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