

Exam: Intro to Veracross

Updated Jul 22, 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](#), and head to [Veracross University](#) for the latest onboarding training. Please update your bookmarks.

Overview

Here is an "exam" you can take. If you are able to work through the "Know" and "Do" sections, you can consider that you have mastered the contents of this unit. This can also be a helpful review. An answer key is available: reach out to your school's point person or your Veracross account manager to get access.

Know

Answer the following questions.

1. What is an SIS?
2. What is a CRM?
3. Describe what Veracross is in two minutes.
4. Where do you log into Axiom?
5. What is an Axiom homepage? Describe the navigation elements (blue bar) across the top of the screen.
6. What can you search for in the top search bar in Axiom?
7. How would you describe the location in Axiom of the "Review Class Configuration" query? (hint: start on the System homepage)
8. What are the links with yellow backgrounds on homepages, e.g., on the Main homepage when logged in as vc.client?
9. What do the Action (lightning bolt) and Organize (+ sign) do?
10. What is a detail screen? What are tabs?
11. What is the audit log? How can you access it on a detail screen?
12. Distinguish people and households in the Veracross CRM.
13. What are relationships in Veracross? How are they recorded? How are they different than people?
14. What is the significance of one record per person in Veracross?

15. What is a query?
16. Identify and explain the three parts of the query design interface.
17. What are query criteria?
18. What does it mean to subtotal and summarize a field?
19. Describe some of the actions you can take with query results.
20. If someone needs information from your system and they don't have Axiom access, how could you send it to them?

Do

Complete the following tasks. Save the relevant records and queries to a "Training" workspace in your personal folder.

1. "I wonder how many people's names start with "Ab"? you mused. Name the query "Last Names Starting With Ab".
 - anyone with a last name beginning with "Ab"
 - sort by last name (descending)
2. Find students for the registrar.
 - students in high school (or a school level your school has), subtotaled by grade
 - fields to include: Person ID, Full Name, Current Grade, Advisor, Homeroom Teacher, Gender, Roles (Note: your school may not utilize advisors or homerooms, but the fields are still present)
 - sort by grade and then last name
3. Find middle school classes for the registrar.
 - taught in the current school year, active or future status
 - subtotal by grade and then teacher
 - sort by grade, then teacher, then class ID
4. Find school-level class enrollments by student for the registrar.
 - subtotal by student
 - sort by student, then class ID
 - hide the Late Date Enrolled, and Date Withdrawn fields
 - hide the field(s) you pulled in to limit the search to lower school (or a school level your school has)
 - rename the Status field to "Class Status"
 - ignore enrollments with a Date Withdrawn populated
5. Thus spake the registrar, "I need to know who took a religion (or a subject your school teaches) class last year."
 - Create and save a query that answers this question. Use a class taught at your school, e.g., religion, language, science, etc.

- Name it "Last Year's [Class Name] Classes."
6. Thus spake the upper school division head, "I need to see how kids are doing this grading period in their classes."
- Create a query (start with "Find Class Assignment Grades") that shows an average grade of class assignments for upper school classes in a given grading period (your choice of grading period).
 - Name the query, "Class Assignment Grade Averages in {grading period}"
7. "I want to see my AP European History (or any other class) class roster, including those kids who dropped," Debbie casually mentioned to you in passing.
- Head to a class detail screen (class ID if you are using the demo: APEuro.8; otherwise pick a class in your own database).
 - Pop out the roster and adjust the query to include withdrawn kids. (hint: look at any criteria in the query that may prevent a withdrawn student from being shown).
8. All of the upper school (or a school level your school has) classes need to be hidden from the parent and student portals.
- How would you hide classes in the parent and student portals?
9. Pick one of the amazing queries you created that doesn't have a gazillion records in the result.
- Print the results to a PDF.
10. Pick another one of your amazing queries.
- Adjust any search criterion (e.g., change the second query to search for MS instead of HS students).
 - Save it as a new query with an appropriate new name.
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