

Parent, Student, and Teacher Portals

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

Take a tour of parent, student, and teacher portals at a medium-level view designed to orient you enough to fill in the details by your own clicking around and consulting documentation.

The Portals 3.0 Platform

After watching this video answer or complete the following:

1. What is the Portals 3.0 platform? What is its relationship to Axiom?
2. How do you switch between portals?
3. What are role-specific components in a portal?
4. What are component screens? Where can you find them in Axiom?

5. What are portal shortcut links, e.g., {system:teacher_conferences}?
6. What is a filtered notification link?

Navigation

After watching this video answer or complete the following:

1. Where do you edit a portal's navigation?
2. What are some ways you can set up navigation?
3. How do you add navigation items to portals?.

Configuration

After watching this video answer or complete the following:

1. Where can you find configuration options for each portal?
2. "I want to turn off the daily schedule feature in the student portal." How would you do that?
3. How can you tell the intended audience for a portal?
4. What school year does a portal reflect?
5. How can you roll a school's portal year forward?

Component Screens

After watching this video answer or complete the following:

1. Walk through the process of adding a new component screen.

Content Screens

After watching this video answer or complete the following:

1. What are content screens? How do they differ from component screens?
2. How could you build a new content screen that gives information about a program at your school?

Directories

After watching this video answer or complete the following:

1. What are directory types in Veracross?
2. In all students directories (meaning, the student directory type), how could you configure photos to display in the portal but be hidden when printed?
3. "I want to hide grade level badges in the student directory type." How would you do this for them?
4. "I want parents to be able to remove their household information from the student directory." How do you do that?

5. Navigate to any of the directory types. Write out – in plain English – what the particular configuration and preferences settings mean, as if you were explaining to a parent or school point person who was not familiar with Axiom.

Publishing Queries

After watching this video answer or complete the following:

1. What is a published query? What portals can you publish one to?
2. How could you create a person query and publish it to a portal?

Membership Management

After watching this video answer or complete the following:

1. What is membership strategy?
2. Why is the Status Default field important to consider?
3. "I need to temporarily remove a parent's ability to access the parent portal." How can you achieve this?
4. What is "strategy match" for?

Launching Portals

Here are two webinars that cover the steps for building and launching portals. They are helpful to watch as reviews of material covered earlier in the unit, as well.

After watching these videos answer or complete the following:

1. What are your options for branding portals?
2. What is a sitemap? How can it help your portal planning?
3. What are portal shortcut links? How do you use them?
4. What are "Article" component types for? How might you use them? How can you use tags to control publishing?
5. What is a welcome email? Where do you configure it?
6. When you create user accounts, how do you know what their username is and what welcome email template they will get?
7. What are the two basic things that need to be true in order for a person to access a portal, e.g., for a parent to access their parent portal?
8. How can you create user accounts in batch? Why would you want to do this?
9. When you close the school year and alumni have their student accounts removed, how can you "clean up" portal membership?

Troubleshooting Portals

After watching this video answer or complete the following:

1. "I can't get into my portal." What should you check?
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