



Visita Portal Summer Rollover



Before the school year begins, please complete the following steps to ensure your portal is accurate and up to date.

Step 1: Save Data

- Run reports for all data from the previous school year and save (attendance, visitors, employees, etc.).

Step 2: Update Check In Reasons

- Settings > Check In
- Recommended: Edit reasons that will no longer be used by adding an *End Date* OR edit the reason and choose to *Limit to Role > Super Admin*.

Note: Deleting Reasons: If a reason needs to be deleted from the list, it is strongly recommended to run a report and save data BEFORE deleting any check in reasons. (Once deleted, historical data for that reason will not be recovered).

Step 3: Security

- Settings > Security
- Review & update Security “Who to Notify”

Step 4: Super Admin

- Settings > Roles > Super Admins
- Review & update Super Admin access. We recommend keeping this role to 3-5 users to help control access to major system changes.

Optional:

Safe List

Review the Safe List (Users > Safe List).

Watch List

Review the Watch List (Users > Watch List).





Visitu Manual Schools



Step 1: Remove Users (if needed)

- **Please download a report of your current data by roles**
 - Go to **Settings > Users**
 - Under the **Manage Users** section, click **Export CSV**
 - Select the **Role** one at a time
 - Click **Export**
 - Wait for the system to finish the export
 - **Repeat** the same steps for each role
- **Remove profiles**
 - Option 1 (Individually)
 - Go to **Users >** select the type from the drops down list
 - Click on the **three-dot menu**, then **View Profile**
 - Click **Edit** from the top ribbon options
 - Scroll down and then click the red **Delete** button
 - Click on the **red button to confirm**

Note: Deleting a user will remove their association with this location. There is no recovery process for this.

- Option 2 (In Bulk)
 - Go to **Settings > Users**
 - Under the **Manage Users** section, click **Delete Users**
 - Select the **Role**
 - Click **Start Delete**
 - Click **OK** to confirm you want to move ahead with deleting all users within the selected role
 - Type **"I am sure"** then OK to complete the action

Note: Bulk delete will remove any records created by your users, this includes enrolled devices and audit logs.





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Step 2: Add New Users by CSV Upload

- **Prepare your file(s)**
 - Please complete the attached templates (*click the CSV names below to open*)
 - **EmployeeList_sample.csv**: Please include the names and official emails of all teachers, office staff, and any other staff who may need access to the VisitU platform).
 - **StudentsList_sample.csv**: Please include all your students' information.
 - **ParentsList_sample.csv**: Please include all applicable parents information. One same student can be connected to multiple parents/guardians in VisitU.

Note: Ensure the file format is CSV before uploading.

- **Upload your file(s)**
 - Go to **Settings > Users**
 - Under the **Manage Users** section, click **Import CSV**
 - Select the **Role**
 - Click **Next and Choose File**
 - Click **Next and Match Fields** (see details below)
 - Click **Start Import**

Matching Fields

- Select the appropriate field from the existing list.
- If a field does not exist, select New Field, choose the Field Type, or select Custom if none apply.

Additional Notes:

- Not all columns in your file need to be matched. Just match what you need for the upload. The system will ignore the rest of the columns.
- When uploading Parents, if the file contains children's IDs already added to VisitU, you can link them by selecting the field with the ID and choosing Link to Student.





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Step 3: Update Existing Users by CSV Upload

- **Please download a report of your current data by roles**
 - Go to **Settings > Users**
 - Under the **Manage Users** section, click **Export CSV**
 - Select the **Role one at a time**
 - Click **Export**
 - Wait for the system to finish the export
 - **Repeat** the same steps for each role
- **Update the profiles without editing or removing the "VID" column.**
- **Upload your file(s)**
 - Go to **Settings > Users**
 - Under the **Manage Users** section, click **Import CSV**
 - Select the **Role**
 - Click **Next and Choose File**
 - Click **Next**
 - Change the option under Update Existing Records to and VID (if you don't see this option please reach out to support for assistance)
 - **Match Fields** (see details below)
 - Click **Start Import**

Matching Fields

- Select the appropriate field from the existing list.
- If a field does not exist, select New Field, choose the Field Type, or select Custom if none apply.

Additional Notes:

- Not all columns in your file need to be matched. Just match what you need for the upload. The system will ignore the rest of the columns.
- When uploading Parents, if the file contains children's IDs already added to VisitU, you can link them by selecting the field with the ID and choosing Link to Student.





Visitu Automated Schools



The automation will add new profiles (students/parents/employees) to VisitU as soon as they are marked as enrolled/active on the SIS.

RECOMMENDED STEPS:

Review the status of your integration

- Go to Settings > Integrations > Click Configure next to your integration name The status should say "Connected".*

Power School API Users: Please update the "Year ID Override" with the correct year ID from Power School as this information changes every year

Review the roles mapping

- Go to **Settings > Roles**
- Click on the **role name or pencil icon to edit**
- **Edit Role** and **Integration Options**
- Review that the fields under **Integration Options > Roles to Sync** are correct for each role
- Toggle on **Auto Remove Users****

Note: This should only be done one time every year to avoid data loss. We recommend enabling the option during Summer and get disabled back after Rollover is completed. **Deleting a user will remove their association with the VU location. There is no recovery process for this.

Run a sync to update the profiles

- Go to **Settings > Integrations**
- Click **Sync now**
- Once sync is complete go back to **Settings > Roles**
- Click on the **role name or pencil icon to edit**
- Toggle off **Auto Remove Users** option

Review and update the attendance reasons mapping**(Only applicable to schools who use attendance write back)

- Go to **Settings > Attendance** – the system will take you directly to the Tardy Reasons tab.
- Click the **pencil icon next to each reason to edit.**
- **Update the name** to match your school's specific attendance codes.
- Use the **Integration Type** drop-down to map each reason to the correct option in your SIS.
- Review your changes and click **Submit** to save.





Visitu Automated Schools



Remove profiles from roles that are not synced (like Visitors) if applicable.

Schools can choose to leave the profiles for historical data. ***Deleting a user will remove their association with the VU location. There is no recovery process for this.***

- **Option 1 (Individually)**

- Go to **Users > select the type** from the drops down list
- Click on **the three-dot menu**, then **View Profile**
- Click **Edit** from the top ribbon options
- Scroll down and then click the red **Delete** button
- Click on the **red button to confirm**

- **Option 2 (In Bulk)**

- Go to **Settings > Users**
- Under the **Manage Users** section, click **Delete Users**
- Select the **Role**
- Click **Start Delete**
- Click **OK** to confirm you want to move ahead with deleting all users within the selected role
- Type **"I am sure"** then OK to complete the action

Note: Bulk delete will remove any records created by your users, this includes enrolled devices and audit logs.

