Additional Integrations

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- VeraCross
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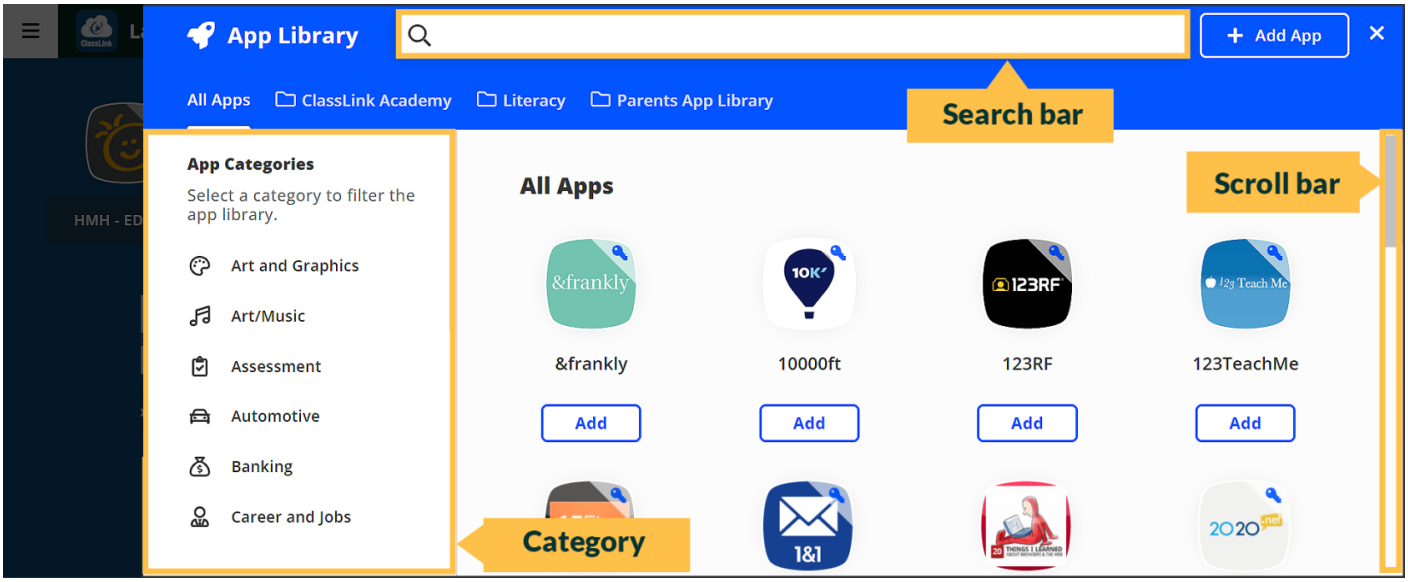
ClassLink

ClassLink Integration

The pickAtime and ClassLink integration consists of two essential components: Direct Data Import and Single Sign-On (SSO). Follow the steps below to connect your accounts.

Step 1: Add the pickAtime Application

1. Log in to your **ClassLink Management Console (CMC)**.
2. Navigate to **Applications**.
3. Select **Add & Assign App,** then **App Library**.
4. Search for **pickAtime** in the **App Library**.
5. Add the application to your LaunchPad environment by clicking the **Add** button for the app.



If you do not see the pickAtime application, contact pickAtime Support for assistance.

Step 2. Enable Direct Data Import

Use this to automatically import teachers, students, class rosters, parents, and parent-student relationship data for your parent-teacher conferences.

1. Once you have added the pickAtime app, you will set up your data sharing permissions.

   For a step-by-step guide, visit the Add Applications and Determine Data Sharing Permissions page within the ClassLink Help Center.
2. Once the app is added and sharing permissions are set, pickAtime will receive an automated notification. Our team will configure the import on our end.

3. Confirmation: You will receive an email from us once the data import is active and ready for use.
4. Before your initial import, navigate to the Rosters > Demographics section in ClassLink. Ensure that the security value (student DOB) permission is activated for the pickAtime app. This is required to allow parents to link to their students. Please review the following page to learn more about enabling this permission for the pickAtime app.
5. Once permissions are updated, run the data import.

> Recommendation: Clear old data before the new import.

Step 3. Configure Single Sign-On (SSO)

This allows your users to log in to pickAtime securely using their ClassLink credentials.

1. Log In: Sign in to the pickAtime Admin UI.
2. Navigate: Go to Global Setup / Business.
3. Locate SSO Settings: Scroll down to Integration Options and find the Single Sign On section.
4. Select Provider: Choose **ClassLink SAML** from the SSO Provider drop-down menu.
5. Enter Credentials: Paste your **IdP Metadata URL** into the respective field.

> ***Note**: If you need help finding these URLs, refer to the SAML Console page within the ClassLink Help Center for a step-by-step guide on locating your IdP credentials.*

Step 4: Assign the Application

Assign the pickAtime application to the users or security groups who should have access, such as:

- Administrators
- Teachers
- Staff
- Parents
- Students (if applicable)

Only assigned users will see the pickAtime application in their LaunchPad. Click here for details.

Step 5: Test the Connection

Before making the application available to all users:

1. Sign in to ClassLink using a test account.

2. Launch the pickAtime application from LaunchPad.
3. Verify that the user is automatically signed in to pickAtime without being prompted for a separate username or password.
4. Confirm that the correct pickAtime account is open and that the user's permissions are correct.

Step 6: Publish the Application

After successful testing, make the application available to your desired user groups.

Users can now launch pickAtime directly from their ClassLink LaunchPad using their existing ClassLink credentials, eliminating the need to remember a separate pickAtime username and password.

NOTE: Preventing Duplicate Contacts for Existing pickAtime Accounts

If your school has used pickAtime without integration, imported data files manually, and now wants to enable a ClassLink integration, duplicate contact records may occur due to differing contact IDs (teacherID, studentID, parentID).

Steps to remove old data:

1. Create a new event using a past event as a template to preserve settings, notifications, and appointment fields.
2. (Optional) Export reports from past events on the Reports page.
3. Delete all past events except the new one.
4. Go to Global Setup / Contacts / Advanced Options, then click Delete All Contacts. In the pop-up, select Level to delete: Admin Level - Event Administrator (this removes contacts with lower access level and contacts with customer access level - parents and students).
5. Run the new integration import.

> This ensures clean data syncing without duplicates. Contact support@pickatime.com if needed.

Parent Access

If using SSO

Parents using SSO will access via the App Shell on LaunchPad, using the instructions included here
.

If not using SSO

Parents not using SSO will access from pickAtime using the URL provided by the school, using the instructions included here.

FAQ: We recently switched to ClassLink. Parents can sign in, but when they try to link their child, they receive the error: "We are unable to find your student records with the values you have supplied." And when we view the contact record for that student, the security value field is blank. How do we fix this?

A: This error occurs because student Security Values (Dates of Birth) were not included in the initial data import. When a parent enters a birth date to verify their student, the system finds an empty field in pickAtime and denies the match.

The security values (student DOB) are located in the **Rosters > Demographics** section in ClassLink. Most likely, this step may have been skipped when the pickAtime app was initially added. Please review the following page to ensure you have enabled this permission for the pickAtime app.

Once permissions are updated, run the data import again. This will populate the missing birth dates in pickAtime and allow parents to successfully link their students.

FAQ: What happens with our teacher teams?

A: The data transfer brings over all teachers of a class: the lead teacher and any co-teachers. A class with two or more teachers comes in as a team:

- The team is named after its teachers in alphabetical order of their names as shown in pickAtime; the order does not show who the lead teacher is.
- The team has its own schedule: create time slots for it on the Appointments page. The teachers' own time slots are not used for the team's classes.

If the teachers of a class change in Classlink after the import (for example, a co-teacher is added), the class stays where it is, and the import reports that it "**has already been assigned to another teacher**". To fix it, move the class to the teacher or team that Classlink now lists (see Moving a Class); if that team doesn't exist yet, create it first (see Creating Teams). After that, the import no longer reports the class and leaves it where it is.

If no time slots have been created yet, you can instead run Import with "**Remove all resources and their classes**" checked: the import then rebuilds all teachers, teams, and classes from Classlink. It also removes anything added by hand, and it does not run once the event has

appointments.

Parent Instructions for Classlink SSO

Step 1: Sign In

Parents access the pickAtime Online Scheduler directly from LaunchPad, via the pickAtime App Shell.

Step 2: Select Your Student(s)

Your student will already be attached to your account.

- Click the student(s) whose schedule you'd like to view.

> If a student is attached but shows no classes within the event, please contact the event administrator.

Step 3: Select Teachers

By default, all of your child's teachers are selected.

- **To exclude a teacher:** Uncheck the box next to their name.
- **When ready:** Click **Filter Slots**.

Step 4: Book Appointments

The scheduling grid displays available times as squares with a **plus sign (+)**.

1. Click your preferred time square.
2. Click **Create Appointment**.
3. A confirmation message will briefly appear at the top of the screen.
4. Repeat for each teacher you'd like to visit.

Managing Your Schedule

View or Print Your Schedule

Click **Printable Schedule** in the left-hand sidebar to see your full itinerary.

Changes & Cancellations

On a computer:

1. Click **My Appointments** in the left-hand sidebar.
2. Locate the appointment you'd like to change.
3. Hover over the appointment to reveal **Details**, **Edit**, and **Cancel** options.

On a mobile phone:

1. Tap the **menu icon** (☰) in the top-left corner.
2. Select **My Appointments**.
3. Tap the **three dots (⋮)** next to an appointment to modify or cancel it.

Clever Integration

How the Integration Works

The integration with Clever will bring in students, teachers, classes, and enrollment, and no SSO. You will do a one-time import to bring in the initial data. Optionally, the data could be synced nightly at 1 AM. Once the data has been imported, it will be available on your account in the Admin tool, and you will then be able to create the slots for your parents and open them up for booking.

For our data transfer integrations, we do charge a 3rd-party integration fee of $230 annually per school attached.

1. 1. To start the process, we would send you an invite from Clever.
   2. Once accepted, we will set up your account for the Clever data sync, and you will create an event on your account. Then, when you import your files, you will see that the importer is set up for Clever. You will select the Terms to import, which will kick off the sync.

Locating Data within a Term in Clever

Clever places the data into different Terms. These Terms may or may not match what your school has in its SIS. We encourage you to review the data before importing.

To review your information, go to the Data Browser, and under Terms and Sections, you can review the data that is within each section.

> pickAtime offers the Clever v3.0 API data importer with the option to switch between the v2.0 and v3.0 versions per a request to pickAtime Support.

Data Transfer

The integration will give your students and teachers different IDs from your SIS.

To do the data transfer, go to the Importer under Main Navigation. Select the event, your school, and the term. Once you have done the initial import into your event, the integration will do a nightly sync for individual events.

>

> There is the option to import parent and relationship data, if available within your school's Clever account.

Removing Classes from Your Event

In the Admin UI tool, open the event, and go to the Class Editor tab. Tick the box labeled 'show only classes' on the far side. This will present a list of all the classes you have imported. Select the classes to be removed and then click on the Delete Class option. This will remove all of those classes.

To remove a single class, click the red x to the left of the class name within the Class Editor.

However, these classes will reappear when the nightly data import occurs. To maintain the nightly sync and not have the classes appear within the event, select the Hide option within the Class Editor under the ‘Type’ column for the class.

The nightly sync can be disabled by clicking the "Stop Sync For the Selected Event" or "Stop Sync For All Events" buttons. When you do this, you will see a confirmation prompt, and in the dialog for "Stop Sync For All Events", a list of events with sync enabled will be displayed.

NOTE: Preventing Duplicate Contacts for Existing pickAtime Accounts

If your school has used pickAtime without integration, imported data files manually, and now wants to enable a Clever integration, duplicate contact records may occur due to differing contact IDs (teacherID, studentID, parentID).

> Recommendation: Clear old data before the new import.

Steps to remove old data:

1. 1. Create a new event using a past event as a template to preserve settings, notifications, and appointment fields.
   2. (Optional) Export reports from past events on the Reports page.
   3. Delete all past events except the new one.
   4. Go to Global Setup / Contacts / Advanced Options, then click Delete All Contacts. In the pop-up, select Level to delete: Admin Level - Event Administrator (this removes contacts with lower access level and contacts with customer access level - parents and students).
   5. Run the new integration import.

This ensures clean data syncing without duplicates. Contact support@pickatime.com if needed.

FAQ: What happens with our teacher teams?

A: The data transfer brings over all teachers of a class: the lead teacher and any co-teachers. A class with two or more teachers comes in as a team:

- The team is named after its teachers in alphabetical order of their names as shown in pickAtime; the order does not show who the lead teacher is.
- The team has its own schedule: create time slots for it on the Appointments page. The teachers' own time slots are not used for the team's classes.

If the teachers of a class change in Clever after the import (for example, a co-teacher is added), the class stays where it is, and the import reports that it "**has already been assigned to another teacher**". To fix it, move the class to the teacher or team that Clever now lists (see Moving a Class); if that team doesn't exist yet, create it first (see Creating Teams). After that, the import no longer reports the class and leaves it where it is.

If no time slots have been created yet, you can instead run Import with "**Remove all resources and their classes**" checked: the import then rebuilds all teachers, teams, and classes from Clever. It also removes anything added by hand, and it does not run once the event has appointments.

Microsoft Entra ID (Formerly Azure AD)

pickAtime offers SSO integration with Microsoft Entra ID. This option will allow your participants to access pickAtime from the Entra ID Portal without the need to create an account. This guide walks you through configuring Microsoft Entra ID (Azure AD) SSO for PickATime.

Setting up Entra ID

Required for Setup

- You must be an admin
- This setup is for single-tenant only
- Please review the Multifactor authentication and Conditional Access policies if applicable for your situation.

Setup Steps

1. Login Entra ID
2. Navigate to App Registrations
3. Click “New Registration.”
4. Name, i.e., PickAtime
5. To control who can use this application or access this API, set Accounts in this organization directory only (Default Directory only - Single tenant).
6. Applicable URIs

A. Go back to the PickATime app and go to **Global Setup/Business/Integration Options**, and within the Single Sign On drop-down menu, select Azure Ad. You will then see the redirect URL.



B. Copy and paste the URI in the Redirect URI field within Entra ID. The format will resemble:

https://pickatime.com/client?ven=11600000&azuresso=on

7. The app 'PickAtime' will appear in the sidebar.

8. Click Authentication.

9. Then, under the “Settings” tab, navigate to Web and SPA settings, check the boxes 'Access tokens' and 'ID tokens', and click 'Save' at the top.



10. On the sidebar, click 'Overview'. You will then copy and paste the 'Application (client) ID' and 'Directory (tenant) ID' into the pickAtime Global Setup/Business page, Advanced Options, Azure AD Integration section.



When all the above are completed, you would use the URL in the following format: https://pickatime.com/client?ven=11600000&azuresso=on

11. Next, navigate to Enterprise Applications in Entra ID, select the corresponding Application, and go to “Users and Groups.” Here, add groups that you want to have access to the PickATime account.



How to add/invite users into Entra ID Active Directory

1. Select Entra ID Active Directory
2. In the sidebar, select Users
3. The 'All Users (Preview)' page would appear.
4. Click 'New User' at the top, then set the radio button 'Invite user', then enter the email address and click the ' Invite button.

Note: On the 'All Users (Preview)' page, you can select your user contact on the profile tab. Then make sure that the selected user has an email address in the Contact Info section, Email field.

Single Sign On with Entra ID

Step 1 – In pickAtime

In the Admin UI tool, go to the Global Setup/Business/Single Sign On, SSO Provider = Azure AD

Copy and paste the Client ID and Tenant ID



Step 2 - In Entra ID

Go to App Registrations → select your existing pickAtime app

1. Check the pickAtime Account ID with the Environment
2. Check Settings (check Access to Tokens)

Navigate to Authentication

1. In Redirect URIs, click Add URI
2. Paste the new Redirect URL
3. Click Save

Testing the URL

Once you have set up the integration, test the SSO by having a user access pickAtime via the portal.

VeraCross

Veracross - Setting Up the Integration

This guide explains how to connect Veracross with pickAtime. Please note that the setup process is completed inside the Veracross Axiom backend.

Before You Begin

1. You must have one of the following Veracross roles or permissions:
    - System Administrator
    - IT Administrator
    - API Administrator
    - Integration Manager
    - If you do not see the integration settings described below, contact your school's Veracross administrator or IT department.
2. Contact pickAtime so that the integration can be activated on the pickAtime side.

Step 1: Confirm API Permissions

Before creating the integration, your Veracross account must have the **OAuth_App_Admin** security role assigned.

> **Important:** Even standard System Administrator accounts cannot create API integrations unless this permission is specifically enabled.

Without this role:

- Integration setup buttons may be hidden
- Fields may appear read-only
- OAuth applications may not be accessible

If needed, ask your Veracross administrator to assign this permission.

Step 2: Log Into Veracross Axiom

1. Log into your school’s Veracross Axiom dashboard using your administrator credentials.
2. Open the **Identity & Access Management** section.
3. Under the Configuration area, select **OAuth Applications**

This page manages third-party integrations.

Step 3: Create a New OAuth Application

1. Select **Add Record** or **Add OAuth Application**
2. Fill out the basic application information.

Recommended settings:

Name

Enter a recognizable name such as:

- pickAtime Integration
- pickAtime Scheduling Sync

Internal Notes

Add a short description for your staff. For example: “Integration used for conference scheduling and roster imports.”

Contact Email

Enter the support or technical contact email address.

Step 4: Configure API Permissions (Scopes)

Once the application is created:

1. Open the **Scopes** tab on the left-hand side.
2. Enable the permissions required for your integration.

Required Scopes for Imports

Enable the following permissions:

1. staff_faculty:list
2. staff_faculty:read
3. parents:list
4. parents:read
5. students:list
6. students:read
7. relationships:list
8. relationships:read
9. academics.config.grading_periods:list
10. academics.config.grading_periods:read
11. academics.classes:list
12. academics.classes:read
13. academics.enrollments:list
14. academics.permissions:list
15. academics.enrollments:read

pickAtime needs academics.permissions:list to import the other teachers of each class: its Primary Teachers and Additional Teachers. Schools connected before it was added need it only for these options of the import.

Required Scope for Single Sign-On (SSO)

If using Single Sign-On, also enable:

1. sso

After selecting the required permissions, click **Save** or **Update.** Your Veracross integration application is now created.

Step 5: Copy Client ID and Client Secret

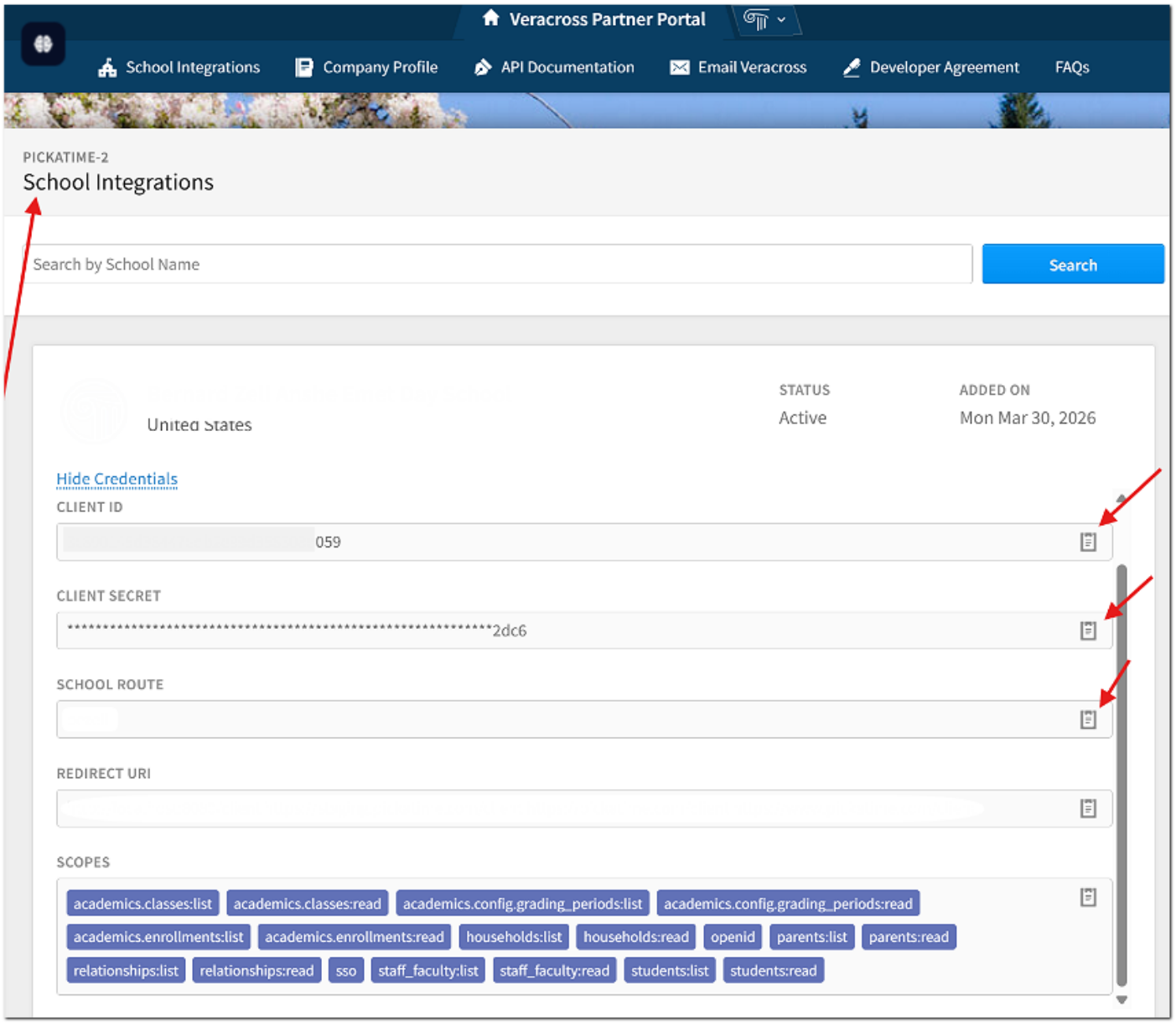
Return to the General tab of the OAuth application.

You will see two important credentials:

Client ID - A unique identifier for the integration.

Client Secret - A secure password-like key used to connect systems.

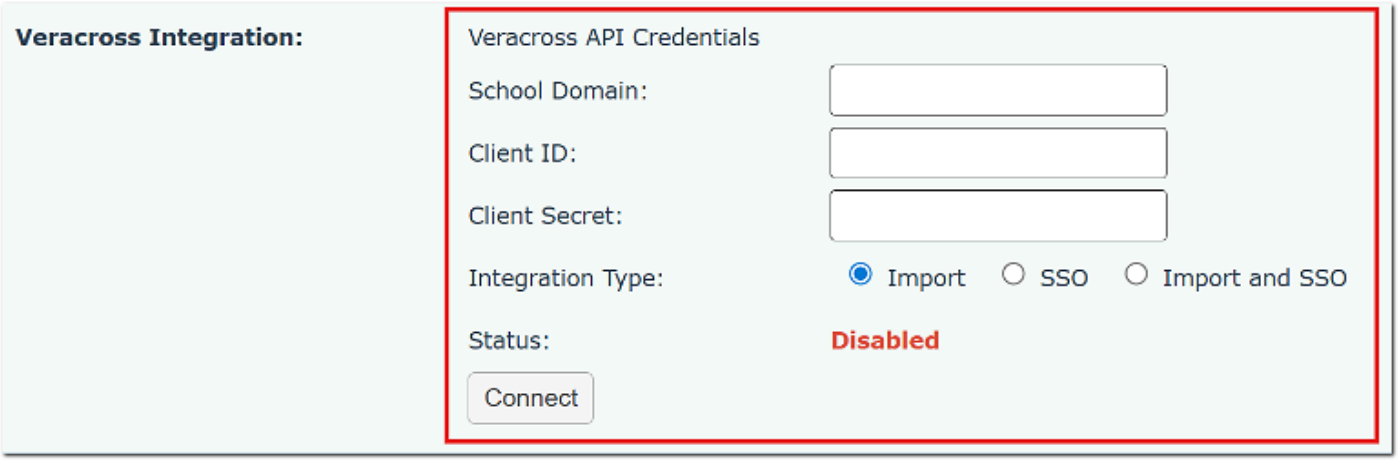
Copy both values.



> Important: The Client Secret may only be fully visible once immediately after creation. If you leave or refresh the page, it may become hidden for security reasons.

Step 6: Add Credentials to pickAtime

1. Log in to your pickAtime administrator account.
2. Navigate to **Global Setup / Business/Integration Options/Veracross Integration**.

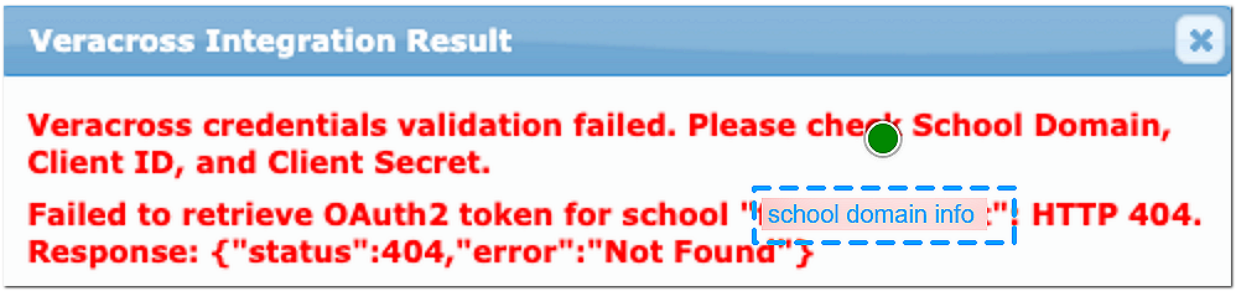


Enter:

- School Domain - this should be your school's name. The easiest place to find this is in the **Veracross URL** your school uses to access Axiom.
- Client ID
- Client Secret
- Integration Type

Then click **Connect**

> Please note that if you get an error message similar to the one below, it means you aren't using the correct School Domain. Often the School Domain is simply your school's name or your *site name*.



Step 7: Add Redirect URLs for SSO (If Using)

If your school is using Veracross Single Sign-On (SSO), add the following redirect URLs to the allowed redirect list inside Veracross:

- https://pickatime.com/client
- https://www.pickatime.com/client

If these URLs are missing, users may receive an authentication or redirect error when attempting to log into pickAtime through Veracross.

> **No** query parameters (like ?ven=XXXXXX or school/account names) should be added to the Veracross redirect list. **The schools should enter the base URLs exactly as written:**

Step 8: Run Your First Sync

Once connected, create an event and run the importer inside pickAtime.

Using SSO?

Be sure to add the pickAtime URL to the Veracross Parent Portal. Click here for instructions.

Use the Seamless Sign-In URL from Global Setup, in the Single Sign On settings (it appears when the SSO Provider is Veracross). It looks like this: https://pickatime.com/client?ven=your vendor ID&seamless=true. Parents who follow it go straight to the Veracross sign-in, without the pickAtime sign-in page. If they are already signed in to Veracross, they are signed in to pickAtime at once.

Contact pickAtime if you need help locating your SSO link.

Recommended Best Practices

Before opening scheduling to families:

- Run a test import
- Verify that the information has been added to pickAtime correctly
- Test the scheduler as a parent

Need Help?

If you need assistance:

- Contact your Veracross administrator
- Reach out to your school's IT department
- Contact pickAtime Support

FAQ: What happens with our teacher teams?

A: By default, the import brings in only the head teacher of each class. To bring in its other teachers too, check "Primary Teachers (co-teachers)" or "Additional Teachers" under Teachers on the import page. These options need the academics.permissions:list scope (see Step 4). A class with several teachers then comes in as one team, and parents book one appointment with all of them. Choose the options before the first import into the event: classes that are already imported keep their teachers.
Without these options, you can create a team by hand following the instructions here. If you do another data sync/import, the class and enrollment will remain with the team, but you will see an error. It can be ignored.

Parent Instructions for VeraCross SSO

Step 1: Sign In

1. Sign in to the **Veracross Parent Portal** and click your school's **Parent-Teacher Conferences** or **Schedule Appointments** link.
2. You will be automatically authenticated and taken directly into pickAtime.

Step 2: Select Your Student(s)

Your student will already be attached to your account.

- Click the student(s) whose schedule you'd like to view.

> If a student is attached but shows no classes within the event, please contact the event administrator.

Step 3: Select Teachers

By default, all of your student's teachers are selected.

- **To exclude a teacher:** Uncheck the box next to their name.
- **When ready:** Click **Filter Slots**.

Step 4: Book Appointments

The scheduling grid displays available times as squares with a **plus sign (+)**.

1. Click your preferred time square.
2. Click **Create Appointment**.
3. A confirmation message will briefly appear at the top of the screen.
4. Repeat for each teacher you'd like to visit.

Managing Your Schedule

View or Print Your Schedule

Click **Printable Schedule** in the left-hand sidebar to see your full itinerary.

Changes & Cancellations

On a computer:

1. Click **My Appointments** in the left-hand sidebar.
2. Locate the appointment you'd like to change.
3. Hover over the appointment to reveal **Details**, **Edit**, and **Cancel** options.

On a mobile phone:

1. Tap the **menu icon** (☰) in the top-left corner.
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