

Web based MIS for the entire school community

# iSAMS - ManageBac Integration: FAQs

Phase 1 – One Way Sync, iSAMS to ManageBac





Web based MIS for the entire school community

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# Introduction

Several scenarios are outlined in this document along with steps required to resolve them.

# **Students**

### Newly created students are not created in ManageBac

Students created in iSAMS must have a unique School Code otherwise they will not be created in ManageBac. We recommend the following settings are enabled.

- **01.** Navigate to Student Manager > Configuration > General Options > Enable the option "Require a Unique School Code"
- 02. Enable Automatic School Code and fill in the other options
- 03. Update Empty School Codes to ensure students are created in ManageBac

	Pupil Manager	С _
Current Pupils Applicants Fo	rmer Pupils Custom Group Manager Add Pupil Management Options	
🛐 General Options 🛛 👩 Photo Import	🔋 🔋 Custom Fields 🛛 🖧 Security Options 📄 Report Setup	
General Opt	tions 2 setup options for the Pupil Manager Module.	
General Options:	The School Age is created from the date on the left. It usually is changed	lat
School Age	e: 1 V September V 2016 V and the beginning of term to the start of relevant months.	a
Show Family Tree	e: 🖉	
Show Deceased Contacts	s: 🖉	
Require a Pupil Title		
Require a Unique School Code		
SC Required ADM Statuse	C. V	
	Denied Enquiry Entrance fee paid JESS Test meeting with JF New Intake	
School Code Options:		
Enable Automatic School Code:		
School Code Prefix: BBTS		
School Code Suffix: X		
Start From: 2229		
School Code Number Length: 10	Excluding Prefix & Suffix.	
Allow override:		
Update Empty School Codes: Updat	ie ie	

# New Student Contacts are not displayed in ManageBac

Not all Contact Types are synced to ManageBac by default. Schools can decide what Contact Types they want to send over to ManageBac.

Navigate to Control Panel > 3<sup>rd</sup> Party Integrations > ManageBac > Configuration > Contact Mapping

Example: If a Contact Type of Next of Kin is mapped to Guardian, all Contacts in iSAMS of type Next of Kin will be sent to ManageBac.

iSAMS Control Panel			×		
The Control Panel Home  Applications & Services  The Gradient Applications  Applicatio	rty Integrations			Search Control Panel	-
Manage Integration Configuration 2				Integration Overview	
		Integration Status			
Initial age back configure the integration between ManageBac and ISAMS.		Faria Integrations			
				🚲 ManageBad	
Status Parent mapping Student mapping	Contact Type mappin 3 Form Grade mapping	User mapping		Apply OpenApply	
🐻 Update mappings below					
🛃 Save Settings 🛛 🧐		Show Unknown	Show All		
iSAMS Contact Type	3rd party Contact Type 1	3rd party Contact Type 2			
🔄 Next of Kin	Guardian (4)	▼ N/A	¥		
🔁 Friend		▼ N/A	•		

### Which Contacts in iSAMS are sent to ManageBac

All Contacts linked to a Student in iSAMS who have a valid "Contact Type" are sent to ManageBac. ManageBac checks the names of the Contact and compares this to the Parents of a ManageBac Student. If the names do not match, a new Contact will be created in ManageBac. Once the Contacts have been linked together a unique ID per iSAMS Contact will be used for any updates moving forward.

# **Contact Scenarios**

### Assumption

These Contact Scenarios assume Sam the student has a ManageBac and iSAMS record which links correctly using the iSAMS School Code and ManageBac Student ID.

### I have more Contacts in iSAMS than ManageBac

Sam has the following contacts in iSAMS and ManageBac before the integration is enabled.

#### iSAMS before Integration is enabled

Mother: Jane Bennett Father: Luke Bennett Uncle: Brian Bennett

#### ManageBac before Integration is enabled

Parent: Luke Bennett

After the integration is enabled the iSAMS Contacts will remain unchanged. New Contacts will be created in ManageBac with the following results.

#### iSAMS after Integration is enabled

Mother: Jane Bennett Father: Luke Bennett Uncle: Brian Bennett

#### ManageBac after Integration is enabled

Parent: Luke Bennett Parent: Jane Bennett

Normally Uncle Contact Types in iSAMS are not sent to ManageBac by default. Please let the iSAMS Support Team know which Contact Types you would like to sync into ManageBac before the integration is enabled.

Jane Bennett will not be duplicated in ManageBac if the First name and Last Name in iSAMS and ManageBac match. Changes in iSAMS made to Luke and Jane Bennett Contacts will be synced to ManageBac.

# I have more Contacts in ManageBac than iSAMS

Sam has the following contacts in iSAMS and ManageBac before the integration is enabled.

#### iSAMS Contacts before Integration is enabled

Mother: Jane Bennett

#### ManageBac Contacts before Integration is enabled

Parent: Luke Bennett Parent: Jane Bennett

*iSAMS Contacts after Integration is enabled Mother: Jane Bennett* 

#### ManageBac Contacts after Integration is enabled

Parent: Luke Bennett Parent: Jane Bennett

Changes made to Jane Bennett in iSAMS will be sent to ManageBac. New Contacts will not be created in iSAMS by the one-way sync Integration.

# My Contacts in ManageBac and iSAMS have slightly different names

Sam has the following contacts in iSAMS and ManageBac before the integration is enabled.

iSAMS Contacts before Integration is enabled Mother: Jane Bennet Father: Luke Bennet
ManageBac Contacts before Integration is enabled Parent: Luke Bennett Parent: Jane Bennett
iSAMS Contacts after Integration is enabled Mother: Jane Bennet Father: Luke Bennet
ManageBac Contacts after Integration is enabled Parent: Luke Bennett
Parent: Luke Bennett
Parent: Jane Bennett

Changes made to the "Bennet" Contacts in iSAMS will be sent to ManageBac. The "Bennett" Contacts in ManageBac will not be linked to iSAMS Contacts. If you decide to delete the "Bennet" Contacts from ManageBac they will be recreated in ManageBac when a change is detected in iSAMS.

Before the integration is enabled we want to update either ManageBac or iSAMS Contacts so that their First Name and Last Names are the same.

# Staff

# New Staff are not created in ManageBac

Only Staff who have a User Account and ManageBac 3<sup>rd</sup> Party Access enabled are created in ManageBac.

These settings can be changed by Navigating to:

- 04. User Accounts
- 05. Search for the individual member of staff
- 06. Modify User Properties
- **07.** 3<sup>rd</sup> Party Access
- 08. Select ManageBac

	iSAMS Control Panel	C _ ×
Tontrol Panel Home > Security & Permissions	User Accounts 1	Search Control Panel 🛛 🌏
This section of the control panel allows you	to manage the users that are allowed to access iSAMS.	
+ - EUser Tree View	N   🔕	
sam 2 🔊	User Information	\$
🚨 iSAMS Admin	User Access and Links	\$
SAMS Admin SAMS Admin	Sam has access rights to log into iSAMS.	
ISAMS Administrator	Users Options and Tasks	\$
Sam Bennett Sam Bennett-Oniver Sam Michau Students Students Sam Bennett-Driver	Modify User Propertie     3     26     User Statistics       Disable Account     7     Login Activity       Reset Password     6     Security Activity       Reset Security Question     2     Edit User Preferences	
iSAMS Employees	Belete User iSAMS Control Panel - Google Chrome	- 🗆 X
	User Management C Secure   https://demo.isams.cloud/modules/controlpanel/security/users/createus Save & Close Create User G User Details Account Details 3rd Party Access 4 Contact Details My Network Faria Integrations: 5 ManageBac: Select to allow this user access to ManageBac.	er.asp?id=samwise25190255

Note: This can be done in bulk via the "User List View"

# New Staff appear in ManageBac but cannot login using LaunchPad

To log into iSAMS via LaunchPad a user's account must be using LaunchPad identity provider.

These settings can be changed by Navigating to:

- 01. User Accounts
- 02. Search for the individual member of staff
- 03. Modify User Properties
- 04. Account Details
- 05. Change Authorisation to LaunchPad

	ISAMS C	ontrol Panel	C _ X
Tontrol Panel Home > Security & Permissio	ns 🕨 User Accounts 🚺		Search Control Panel 🜏
User Accounts This section of the control panel allow	s you to manage the users that are allowed to access iSAMS.		
+ - EUser Tree View EUser Lis	st View 🔯		
sam 2 ®	b User Information		\$
iSAMS Administrators			
ISAMS Admin	User Access and Links		
ISAMS Admin	Sam has access rights to log into iSAMS.		
iSAMS Administrator			
SAMS Administrator	Users Ontions and Tasks		A
Sam Bennett			· · · · · · · · · · · · · · · · · · ·
Sam Bennett-Driver	Modify User Properties 3	User Statistics	
🚨 Sam Michau	Disable Account	Ungin Activity	
Students	Reset-Password	Security Activity	
🚨 Sam Bennett-Driver	Reset Security Question	Edit User Preferences	
iSAMS Employees	🔒 Delete User	Reset User Preferences	
🚨 Matthew Sampson	B iSAMS Control Panel	Google Chrome	- n ×
Demo Users	User Management Or		
🚨 Isams Demo	a Secure https://d	emo.isams.cloud/modules/controlpanel/security/use	rs/createuser.asp?id=samwise25190255
Sam Scholefield	🔒 Create User Acct 📙 Save & Close 🛛 🙀 C	ancel	
	User Details Acc Account Properties: - Account Statu User Grou Security Profil Access Option User Typ Authorisatio	Sunt Details     3rd Party Access     Contact Details       St     Active     •       St     StaMS Administrators     •       Administrators [A]     •     •       *     SMAS Administrators     •       *     SAMS Administrators     •       *     SAMS Confine     SAMS API Login       •     BOX(Intranet Login     •       •     Parent Portal API Login     •       •     Student Portal Login     •       •     Student Portal Login     •       •     Student Portal API Login     •       •     Student Portal API Login     •       •     •     •     •	My Network Space User Devices [0]
Control Panel Home Authentication	User Accounts 3rd Pa		
🖙 🤝 🐨 ISAMS Control Panel 🦉 Par	ent Portal Plana 🔛 Pupil Fortur Plonagor 👝 Fop	manager	

Note: We plan to release a feature to allow schools to change users Authorisation in bulk.

# Staff Address and Contact information is not displayed in Managebac

The iSAMS HR Record must have a Contact with the *Contact Location* set to "Home" and the *Contact Type* of "Self". Any other Contact information will be ignored and will not be sent to ManageBac. The following ManageBac fields are updated by the iSAMS HR Record Contact.

Home Number	Town
Mobile Number	County/State
Address Line 1	Postcode
Address Line 2	Country

# **Data Fields**

# Nationality, Language or Country changes are not displayed in ManageBac

Check if iSAMS Nationalities, Countries and Languages have been mapped to the correct ISO values

Navigate to Control Panel > Mapping Manager

Check the Mapping Status, if any values are unmapped we need to correct this by clicking on the correct ISO Mapping option (highlighted in red).



Quick Tip – When assigning an iSAMS Global List item to ISO Values click "Hide Known Mapping" to quickly find iSAMS Global List Items which are unassigned.

### Some of my Fields are blank in iSAMS

Once the integration has been enabled any fields which are blank in iSAMS will overwrite and remove the data from ManageBac. Please make sure iSAMS is up to date before enabling the integration.

For example:

Students in iSAMS do not have any Languages, once the integration is enabled any Languages stored against the ManageBac record will be removed.

Out of date Contact information in iSAMS, once the integration is enabled all ManageBac contact records will be overwritten by the out of date iSAMS Contact information. It is important to make sure iSAMS has the most up to date Contact information.

# LaunchPad

### LaunchPad SSO is not working after changing my iSAMS URLs

Please update the iSAMS URLS in the following locations.

- iSAMS: Control Panel > Platform Configuration > Domain & URL Configuration > External iSAMS Address
- Parent Portal: Parent Portal Manager > Configuration > Portal Configuration > External & Internal Portal Address
- Student Portal: Student Portal Manager > Configuration > Configuration Options > External & Internal Portal Address

LaunchPad will be automatically updated with the new iSAMS Portal URLs and SSO should now be working.

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