Syncing ManageBac & OpenApply

This is an introduction & a guide to the process of synchronising data between ManageBac and OpenApply accounts.

February 2019

Table of Contents

Introduction

The integration between ManageBac and OpenApply allows schools to:

- Automatically create new ManageBac accounts for newly enrolled students and their parents
- Automatically create new OpenApply accounts for existing ManageBac students and parents
- Withdraw or graduate students in either system
- Monitor enrolment numbers in real-time
- Access consistent demographic data for students and parents
- Monitor and resolve duplicate or conflicting account information
- Login via single sign-on for administrators and parents in both systems

Integration Scope

The integration between ManageBac and OpenApply provides a two-way sync of core demographic data of students and parents.

Once enabled, data will sync every two hours.

The sync includes the following types of students, together with their parents:

1. Students with status **Enrolled** for the present academic year, or earlier. (e.g. a student marked as Enrolled for 2020-2021 will not sync.)
2. Students with status **Withdrawn**[*] or **Graduated**.

The integration allows for three actions:

1. **User Update:** A user's demographic details (e.g. Address) may have been updated in one system. During the sync, this will transfer to the other system.

2. **User Creation:** If a student is marked as Enrolled in OpenApply for the present academic year or earlier, an account will be created on ManageBac, together with their parents. If a new student is created on ManageBac, the account will be synced to OpenApply, together with their parents, as an Enrolled student. Students have to have matching Student ID and Student Email addresses in both systems.
    a. New students created in ManageBac via sync will appear in the correct year level but are not assigned to year groups or classes.
    b. Welcome e-mails are not sent when users are created. Administrators must generate these separately after account creation.

3. **User Archive:** If a student is marked as Withdrawn[*] or Graduated in either system, they are automatically archived, together with the ManageBac parent accounts (if those parents do not have any other enrolled children at the school).

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[*] Please note that **Withdrawn** is interpreted as an enrolled student who departed the school. If your Admissions office is using the status for students who dropped out of the application process (e.g. a student who goes from Pending > Applied > Withdrawn), we advise that they use the **Declined** status instead, so the records do not sync to ManageBac.

We additionally provide for complimentary **Single Sign-On** via our Launchpad service.

Launchpad allows users with verified e-mail addresses in our systems and / or our partner systems to easily move between systems without needing to separately login.

Administrators and parents with verified e-mail addresses in both systems will be able to use this feature.

Availability

The **ManageBac – OpenApply** integration is currently complimentary for all ManageBac and OpenApply schools.

Which fields sync?

Student

First Name*
Middle Name
Preferred Name
Other Name
Last Name*
E-mail*
Date of Birth
Student ID*
Address Line 1
Address Line 2
City
State
Postal Code
Country

Gender*
Languages
Nationalities
Preferred Name
Profile Photo
Enrolment Status (Enrolled, Withdrawn & Graduated)*
Enrolment, Withdrawal & Graduation Dates**
Year Level*
National ID

Parent

First Name*
Last Name*
E-mail*
Date of Birth
Address Line 1
Address Line 2
City
State

Postal Code
Country
Home Phone
Mobile Phone
Work Phone
Preferred Name
Profile Photo
Relationship*

*Required fields for sync
**Schools with sync enabled before Jan 1st, 2019 must request to have these fields enabled. Schools with sync enabled after Jan 1, 2019 will have these fields included automatically.

Where can I see the data?

Navigate to an individual user profile via **Settings > School Directory**.

Student Profile
The fields shown in this screenshot sync with OpenApply, with the exception of:
- Other Name
- UI Language
- English Proficiency
- SSN
- Mobile Phone
- Home Phone

Parent

The fields shown in this screenshot sync with OpenApply, with the exception of:

- Middle Name
- Other Name
- Gender
- UI Language

Please note in the Parent **Work** section, only the **Work Phone** field syncs with OpenApply.

Important Note:
By default, parents and students may edit their own profile information.

To lock this and restrict editing to administrators only, please navigate to **Settings > Access & Security**.
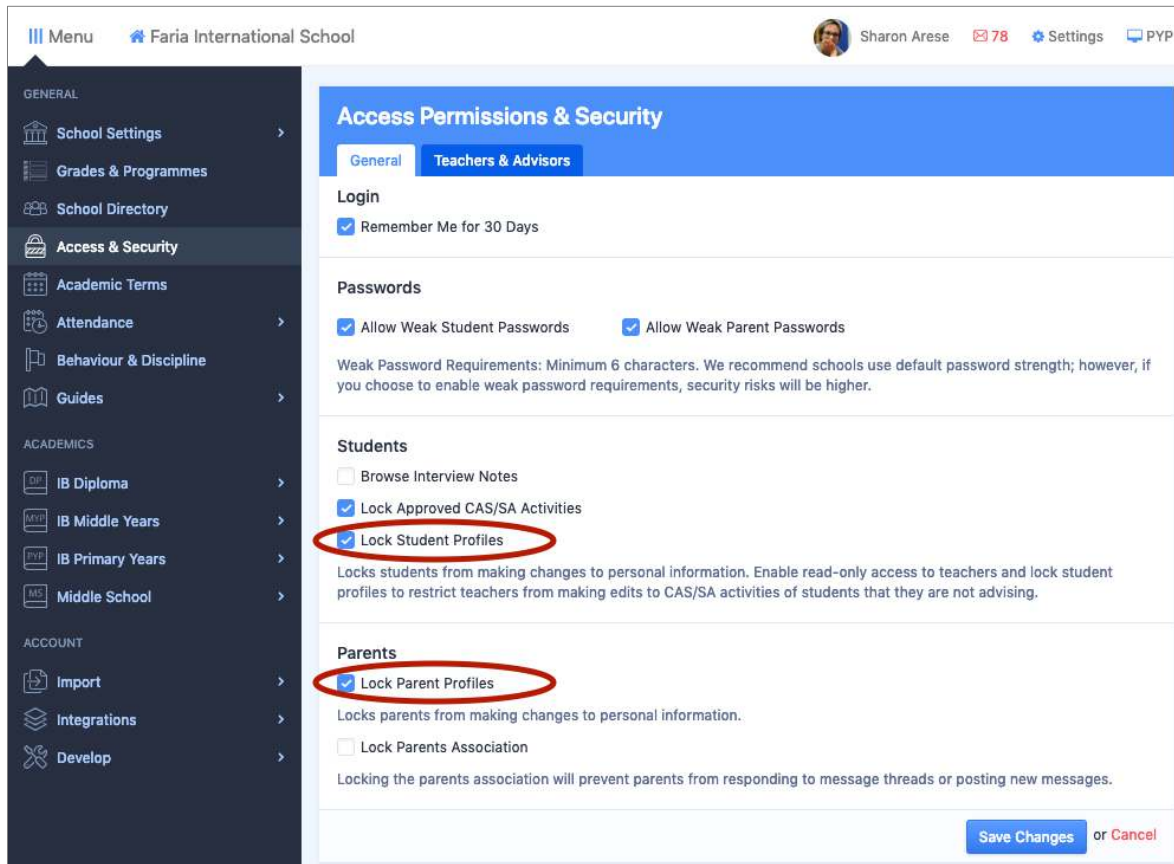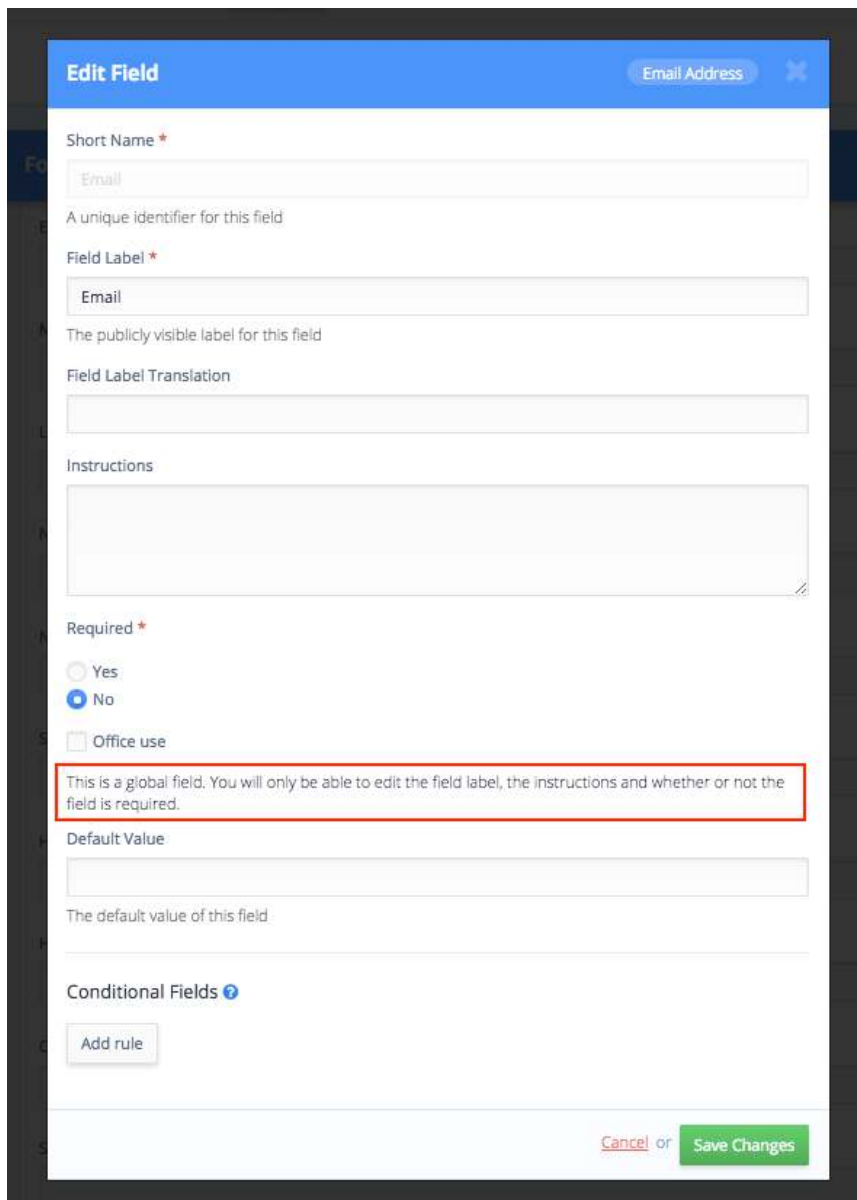
Teachers might also have editing access to Student Profiles. We recommend restricting teacher access to **Read-only** for the Student Directory via **Settings > Access Permissions & Security > Teachers & Advisors**.
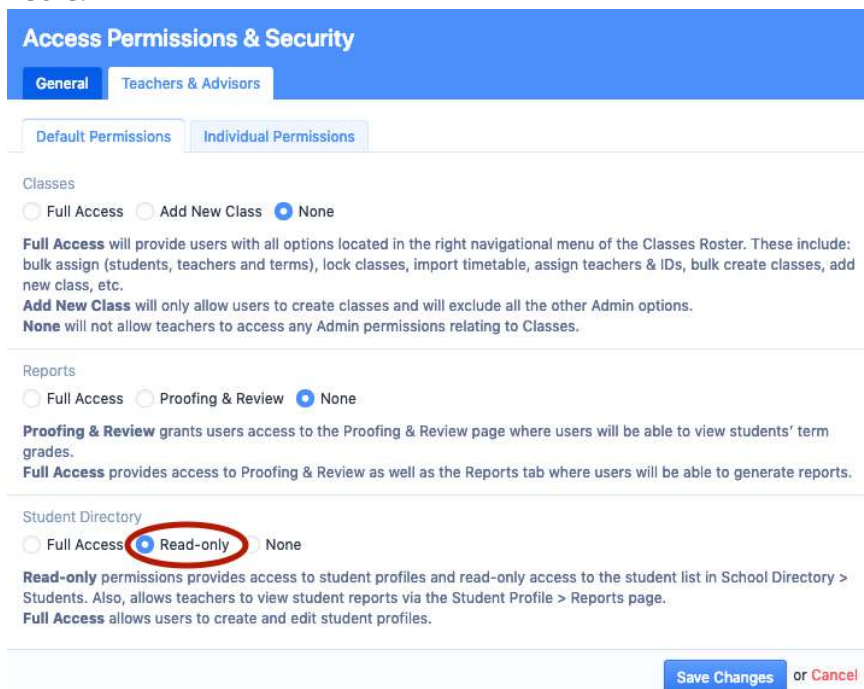
All information on OpenApply is stored in fields, which are included on forms. The fields on each form can be customized within the **Forms Editor**, which an administrator can access via **Settings > Forms**.

All fields that sync between ManageBac and OpenApply are global fields, meaning that they are standardized across our systems.

Within the form editor, you can double-click on a field to edit it. If the field is a global field, you will see a screen like this:

Note that certain fields are both global and mandatory – for example, **First Name** and **Last Name** are always required fields for all applicants.

Important Note:
Because OpenApply allows for custom fields, it's important to double-check your forms to ensure that you are using global fields to store your data. Our Support Team can assist with this verification.

Note that you can rename the labels for global fields, e.g. if you prefer to ask for **Surname** instead of **Last Name**.

If you wish to collect information like **Parent Work Phone** via OpenApply, and do **<u>not</u>** want it to sync over to ManageBac, we recommend using a custom field on OpenApply instead of the global field.

When editing a field, you also have the option of making certain global fields **Office-Use Only**, for example if you do not want parents to provide a **Student E-mail**, and prefer instead for an administrator to enter this data.

For more information, please see the FAQs.

Configuration Requirements

To enable sync between existing ManageBac and OpenApply accounts, the following conditions must be met:

Checklist

☐ 1. The **Year Levels** configured in ManageBac and OpenApply must match in number and sequence.

☐ 2. All enrolled students must have **unique e-mail addresses** in both systems.

☐ 3. All enrolled students must have **unique Student IDs** in both systems.

☐ 4. Both ManageBac and OpenApply accounts must be on the same (current) **academic year**.

☐ 5. ManageBac Support will provide complimentary **data quality analysis**.

Timeline

On average, we recommend allocating **1-2 weeks** to confirm all six steps and go live with synchronisation between both systems. This time is significantly shortened if one or both systems are new accounts.

Years Mapping

Schools can enable up to 16 year levels on ManageBac and OpenApply. The number of years enabled and the sequence of years must be identical on both OpenApply and ManageBac before activating sync.

We do not support multi-year sync (e.g. Having three of your Pre-K year levels on OpenApply sync to one grade level on ManageBac).

ManageBac

To review your enabled years on ManageBac, please navigate to **Settings > Grades & Programmes**.

Note that as part of our commitment to supporting the full range of international and national curricula, schools may enable grade levels for multiple programmes, e.g. if the MYP is offered alongside a national curriculum.

For synchronisation purposes, we need only the number and sequence of years to match.

OpenApply

To review your enabled years on OpenApply, please navigate to **Settings > Admissions > Programme**.

Important Note:

There must be a 1 to 1 correlation between your year levels in order to enable sync. We cannot currently support a partial sync (e.g. It is not possible to have 10 year levels enabled on OpenApply, and sync only 2 year levels to ManageBac.)

E-mail Addresses

Students and parents with blank or duplicated e-mail addresses will not sync between the two systems. As a best practice before enabling sync, we ask schools to review the e-mail addresses on their systems.

On Open Apply

Because ManageBac requires a unique e-mail in order to create a new user, please confirm that the **Student E-mail** field has been added to your OpenApply forms.

1. Navigate to **Settings > Forms** and select your application form.

2. Search for **Email** under the Fields section on the left-hand navigation.

3. Select the field under **Applicant**, and click **Edit Field**.

4. Please configure and confirm:
   a. the field label
   b. if the field is required
   c. any added instructions
   d. if the field is **Office-use Only** (recommended)

   Remember to **Save Changes** for the field.

5. Drag the field into the preferred place on your form.

6. **Save Changes** for the form.

Verifying E-mail Addresses on OpenApply

Navigate to **Settings > Import & Export** to export all students* with status Enrolled, Graduated & Withdrawn.

Include these Export Fields**:

Student Fields
OpenApply ID
First Name
Last Name
Email
Student ID

*Please make sure to include **Archived** students.
** OpenApply ID and Student ID can be found under Extra Fields.

Important Note:
Users with blank or duplicated e-mail addresses will be excluded from sync.

Our Support Team can assist you with:
- Creating dummy e-mail addresses
- Bulk updating blank e-mail addresses
- Checking for duplicate e-mail addresses

We ask that student e-mail addresses match precisely across both systems prior to enabling sync.

Student IDs

Student IDs must be unique. As a best practice before enabling sync, we ask schools to review the Student IDs on their systems.

Important Note:
For schools that do not use the **Student ID** field, our Support Team can help generate unique IDs and update your systems directly.

<u>We ask that student IDs match precisely across both systems prior to enabling sync.</u>

Parent Email Addresses

As ManageBac requires each user to hold a unique e-mail address, only parents with unique an email address from OpenApply will sync to ManageBac.

Checking for Unique Parent Email

Navigate to **SUBDOMAIN.openapply.com/admin/duplicate_parents** to see a full list of your parents with duplicate email addresses.

Newly created parent accounts are not able to share email addresses.

Current Academic Year

If you are currently at the start or end of an academic year, please ensure that **<u>both</u>** ManageBac and OpenApply systems have been transitioned to the new academic year.

Tutorials are available in our online support centre and linked below:

- Transitioning for ManageBac
  https://help.managebac.com/support?lesson=888146&manual_id=1970

- Transitioning to a new academic year on OpenApply:
  https://help.openapply.com/help?lesson_id=554796

In other words, student grade levels should be identical in both systems. (e.g. Chloe is in Grade 12 in both OpenApply and ManageBac.)

Data Quality Analysis

Please e-mail ManageBac Support (support@managebac.com) when you are ready for a **Data Quality Analysis** of your systems.

Please write "**MB-OA Data Quality Analysis**" in your subject line, and include:

- School Name
- ManageBac subdomain (login to ManageBac and copy / paste the URL from your browser)
- OpenApply subdomain (login to OpenApply and copy / paste the URL from your browser)

Our Support Team will verify that:

- The enabled year levels on ManageBac & OpenApply match in number and sequence
- Student E-mails and IDs match in both systems
- Parent accounts have been activated
- Both systems are on the current academic year

Please allow **1-2 business days** for us to complete our review.

We strongly recommend at this stage scheduling a complimentary personal walkthrough of sync, to ensure any questions are answered. (See "Contact" section at the end.)

Data Conflicts & Resolution

Once your data has been imported into our sync console, there are three possible outcomes:

(1) **Auto-Merging:** This process automatically links records in cases of zero conflict or with 1 point of difference.

(2) **Data Conflict:** More than 1 point of difference exists between the two records, and the conflict must be manually resolved.

(3) **Errors:** Records cannot be synced because they have triggered an error.

Auto-Merging

We resolve a significant number of conflicts automatically via an auto-merging process. This helps minimize the volume of duplicates that schools need to resolve.

Identical Data

For example, if data is 100% identical between ManageBac and OpenApply, we will automatically merge the ManageBac and OpenApply accounts.

Student	ManageBac	OpenApply	Result
ManageBac Identifier	100001		100001
OpenApply Identifier		200001	200001
Last Name	Smith	Smith	Smith
First Name	Joan	Joan	Joan
Email	joan.smith@eduvo.com	joan.smith@eduvo.com	joan.smith@eduvo.com
Address	548 Main Street	548 Main Street	548 Main Street
Address Ii			
City	Bridgeville	Bridgeville	Bridgeville
State	CA	CA	CA
Postal Code	20123	20123	20123
Gender	female	female	female
Preferred Name	Joan	Joan	Joan

Identical Data except for 1 MASTER Field

During the Data Quality Analysis, if more than 50 duplicates are flagged, we will examine your accounts to see if there is a consistent pattern to the duplicates. If most accounts show consistent data except for mismatches in only 1 field, we can assist with setting a MASTER system for that field.

For example, if account data is matching but there are discrepancies in **Student Date of Birth**, we assist setting a system MASTER for that field.

In this example, ManageBac was set as the MASTER for Student Date of Birth. This means that if **only** Student Date of Birth is different between the two accounts, we will automatically merge the accounts and take the ManageBac date of birth as accurate. The Support Team will reach out to confirm before setting any MASTER fields on your account.

Student	ManageBac	OpenApply	Result
ManageBac Identifier	100001		100001
OpenApply Identifier		200001	200001
Last Name	Smith	Smith	Smith
First Name	Joan	Joan	Joan
Email	joan.smith@eduvo.com	joan.smith@eduvo.com	joan.smith@eduvo.com
Address	548 Main Street	548 Main Street	548 Main Street
Address Ii			
City	Bridgeville	Bridgeville	Bridgeville
State	CA	CA	CA
Postal Code	20123	20123	20123
Gender	female	female	female
Preferred Name	Joan	Joan	Joan
Birthdate	2012-08-11	2012-11-08	2012-08-11
Status	enrolled	enrolled	enrolled

Data Conflict

These conflicts and potential duplicates are triggered by a certain set of conditions. Records that trigger a duplicate are not synced until they are manually resolved in the sync console.

For Students

1. Two accounts with the same **First Name** AND **Last Name**.

   Note this is not case-sensitive. For example, these are two separate students, but since their First and Last Names are identical, they will be flagged for duplicate resolution.

Student	Student 1	Student 2
Last Name	Smith	Smith
First Name	Joan	Joan
Email	joan.smith@eduvo.com	123456@eduvo.com
Preferred Name	Joanie	Bessie
Status	enrolled	withdrawn
Grade	PYP1	PYP6

   In this case, based on the grade levels, e-mail addresses, preferred names, and grade levels, it's clear that these are separate students.

   However, because their **First Name** and **Last Name** data is identical, the sync console flags them for resolution.

2. Two accounts with the same **E-mail Address**.

Student	Student 1	Student 2
Last Name	Smithwick	Smith
First Name	Jerry	Joan
Email	jsmith@eduvo.com	jsmith@eduvo.com
Status	enrolled	withdrawn
Grade	PYP1	PYP6

   Even if every single field between two accounts is different, an identical e-mail address will trigger a duplicate flag for resolution.

3. Two accounts with the same **Student ID**.

   Same as the example above, with Student ID.

4. Any combination of the three rules above.

   For example, if **First Name**, **Last Name**, and **E-mail Address** are all identical, even if all other fields are different, a duplicate will be triggered for resolution.

For Parents

Duplicates are triggered only if two users have an identical:

- **First Name & Last Name**
- **E-mail Address**

Common Errors

E-mail / ID is taken.

An OpenApply record may not sync to ManageBac if an e-mail address or ID is already taken in the ManageBac system. This typically occurs with archived users.

Invalid E-mail

ManageBac and OpenApply will not accept e-mail addresses that are blank, too short, or contain accent marks.

Final Notes:

1. Duplicate accounts are excluded from the sync process until they are resolved. We will not enable sync on your accounts until duplicates have been cleared.

2. If you have a small number of duplicates, it may be easiest to resolve directly on your ManageBac and OpenApply systems. (i.e. logging in to directly update your data, and then asking our team to re-run the data quality analysis.)

3. If you see a type of duplicate that is not covered by the above types, please contact our Support Team.

On-Going Synchronisation Management

Use Cases

There are three actions that may happen during sync:

1. **User Update:** A user's demographic details (e.g. address) may have been updated in one system. During sync, this will transfer to the other system.

2. **User Creation:** If a student is marked as Enrolled in OpenApply for the present academic year or earlier, an account will be created on ManageBac, together with their parents. Any new students created on ManageBac will be synced to OpenApply as Enrolled students. Students have to have matching Student ID and Student Email in both systems.

3. **User Archive**: If a student is marked as Withdrawn or Graduated in either system, they are archived on the next sync, together with their parents (if those parents no longer have any active children in the school).

This section of documentation details expected behaviour for each of these actions, together with common pitfalls and areas for administrators to review.

We strongly encourage administrators to work closely with our support team to:
- carefully review access and edit privileges for all users on ManageBac and OpenApply,
- carefully review their application forms on OpenApply to confirm where parents have access to editing core demographic fields, and
- develop a best practice flow for how data is updated in their systems.

1. User Update

This is when a user's demographic details are updated in either ManageBac or OpenApply, and the data syncs over.

We strongly recommend that administrators review the access and permissions across both systems to ensure that these updates to data are controlled.

ManageBac

By default, all users on ManageBac are able to alter data in the core sync fields:

- **Administrators**: Have access and edit rights to all data across ManageBac
- **Teachers**: Can update student profile information if they have EDIT access
- **Parents**: Can update their own profile information if they have EDIT access
- **Students**: Can update their own profile information if they have EDIT access

If you have sync enabled, we strongly, strongly recommend that you lock access and permissions down for teachers, parents, and students. (See **Settings > Access & Permissions** on your ManageBac account, or refer to page 6 of this document.)

OpenApply

Changes to data in OpenApply may be introduced by:

(1) Administrators with "Ability to create, edit and delete"

Navigate to **Settings > Staff Directory** to review staff permissions.

(2) Parents on OpenApply who may directly edit the following core fields at any time:

- First Name
- Last Name
- Gender
- E-mail
- Profile Photo

- Home Street Address 1
- Home Street Address 2
- City
- State
- Postal Code
- Country

Parents can access their core profile information via their OpenApply **Dashboard**.

(3) From Parents via Forms on OpenApply, in the following cases:

- Student information is unlocked and therefore directly editable
- Parents complete forms (any type) that include sync fields (for example, during re-enrolment a parent may be asked to review or update address information).

Once saved on OpenApply, this updated information will sync to ManageBac.

2. User Creation

The conditions under which a new student or parent account is created in ManageBac or OpenApply.

1. A New Enrolled Student in OpenApply
Student is enrolled for the present academic year (or a prior year), and has parents.

The student will sync to ManageBac if:

- Student ID is valid and unique
- Student E-mail is valid and unique

The student's parents will sync to ManageBac if:

- The parent e-mail is valid and unique
- The parent has an activated OpenApply account

For more information about how to activate parent accounts:
https://help.openapply.com/help?lesson_id=437585&manual_id=6960

If the parent already exists in ManageBac
There are two possibilities:

(1) <u>If all details match</u>, the accounts will automatically be linked. This will occur most frequently with siblings. For example, Ann Epelbuam already has a ManageBac account because her daughter Chloe is enrolled at the school.

When Chloe's brother Samuel is enrolled, Anne's ManageBac account will be updated to reflect the additional child.

(2) <u>If all details do NOT match</u>, then the account will be flagged as a duplicate and will not be linked. Samuel will sync to ManageBac as an enrolled child without a mother.

Please resolve the duplicate within the admin console.

Common Scenarios
If you are not seeing a student or parent syncing, please run an export from ManageBac via **Settings > School Directory**. Click the Export Students & Parents link. You can do a "Find" in the file to check the Student IDs and E-mail Addresses.

Most often when a student is not syncing, the e-mail address was previously taken (often by an existing parent in the system) or the student previously existed in the system (and is currently archived).

Please also note e-mail addresses with accent marks are not accepted by ManageBac.

2. A New Student in ManageBac

A new student is created on ManageBac. The student will sync to OpenApply as an **Enrolled** student with a bare bones profile.

3. A New Parent in ManageBac

A new parent is created on ManageBac. The parent will sync to OpenApply with a bare bones profile.

Note that this parent account will need to be activated.

Final Notes:

1. In ManageBac, all administrators can create new students or parents.

2. In OpenApply, any administrator with "Ability to create, edit and delete" (see page 23 for more) can create new accounts and change applicant statuses.

3. User Archive

The conditions under which an existing student or parent account may be archived in ManageBac or OpenApply.

Via ManageBac

1. An entire year group is archived in ManageBac.
This is most common upon graduation.

All students in the year group are archived (via **Edit Group Settings**). These students will be archived on the system and marked as **Graduated** with the date of archival.

These students' statuses and graduation dates will be updated in OpenApply upon sync.

2. Student is marked as Withdrawn in ManageBac.
The student status and withdrawal date will be updated in OpenApply upon sync.

3. Parent is archived in ManageBac.
Nothing happens in OpenApply.

4. Student is Withdrawn or Graduated in ManageBac. What happens to the parents?
If a parent does not have active children in ManageBac, they are automatically archived. The parent account will remain active if there is at least one child still enrolled at the school.

For example, if Chloe graduates but her younger brother Samuel is still enrolled, her parents will still retain their ManageBac accounts.

OpenApply does not archive parents under any conditions. Upon logging in to OpenApply, a parent would still see the student statuses and have access to any forms (for example, alumni forms) that the school requests.

Via OpenApply

5. Student is marked as Graduated in OpenApply.
They are archived in OpenApply. Upon sync, the date and the status are updated in ManageBac.

6. Student is marked as Withdrawn in OpenApply.
Same as above.

Deletions

The sync does not support user deletions.

Once a day, our system checks for deleted users, and then stops any further sync across systems. In other words, we will not sync deletions.

1. I mistakenly created a student in ManageBac that has synced over to OpenApply. Can I delete the student?

If you delete the student in ManageBac, nothing will happen to the student in OpenApply. The remaining profile will simply be excluded from sync. (The same is true vice versa.)

In this case, we recommend deleting the student directly in both systems.

2. I created a student in ManageBac that was synced over to OpenApply. I deleted him in OpenApply by accident!

Nothing will happen to the profile in ManageBac, but it will be excluded from further sync. (The same is true vice versa.)

If this was a mistake and you need to re-enable sync, please let us know and we will manually re-enable the flow.

Synchronisation Digest

When synchronisation is first enabled for your school, we will provide you with a **daily** automated digest that includes the following information:

Integration: Sync with OpenApply

Mode: SYNC
OpenApply   FARIA   <-> Passport
Period FROM **2017-08-07** TO **2017-08-14**

Operation	Entity	In	Out
CREATED	Contact	5	83
	Student	3	185
UPDATED	Contact	64	458
	Student	44	383
DELETED			
SKIPPED	Contact	105	10
	Student	202	19
MERGED	Contact	3	
DUPLICATED	Contact	8	10
	Student	8	19
ERROR	Contact		102
	Student		15

Each type is hyperlinked, so for example, to see the 5 newly created parent accounts in OpenApply, you can click on the "**5**".

On request, we can alter the notification to run weekly.

CREATED

Contact / Student:

- **IN**: Lists the number of new parent / student accounts created on Passport from OpenApply.
- **OUT**: Lists the number of new parent / student accounts pushed from Passport to OpenApply.

UPDATED

Contact / Student:

- **IN**: Lists the number of existing parent / student accounts where data was updated on Passport from OpenApply.
- **OUT**: Lists the number of existing parent / student accounts where data was pushed from Passport to OpenApply.

Note that the tokens for our profile photos refresh automatically, generating an "update" when in fact there may not have been an update. You may see a high number of updated records due to this.

DELETED

This is not applicable. Please see the "Use Cases" section for more.

SKIPPED

Contact / Student:

- **IN**: Lists the number of existing parent / student accounts that were ignored during duplicate resolution. These accounts were not created in Passport.
- **OUT**: Lists the number of existing parent / student accounts that were ignored during duplicate resolution, and not pushed from Passport into OpenApply.

Notes:

1. Accounts may also be skipped due to student status (e.g. all of your Pending / Applied / etc. students in OpenApply will be skipped, together with their parents) or to enrolment year (e.g. all students enrolled for a future enrolment year will be skipped.)

   This means that the number of **Skipped** records in OpenApply will tend to be very high.

2. If you were expecting a parent or student to sync into OpenApply from ManageBac, we recommend checking the users listed under **Skipped > Out**. If you were expecting this user to come in, please alert us.

MERGED

The number of OpenApply and ManageBac accounts that were automatically merged. (Linked.)

DUPLICATED

Contact / Student:

- **IN**: Lists the accounts that Passport did not receive due to duplicates being triggered.
- **OUT**: Lists the accounts in Passport that were not sent to OpenApply due to duplicates being triggered.

ERROR

This lists parent and student accounts that triggered an error during sync. The most common example is from newly enrolled students on OpenApply that have e-mail addresses or Student IDs that are already in use on ManageBac.

You will see accounts listed under the **OUT** column only, as it's due to a system validation requirement on OpenApply or ManageBac.

If you click on the hyperlinks, we will display a full list of the errors triggered.

Frequently Asked Questions

Students

1. **I just enrolled a new student in OpenApply. It's been more than two hours and I don't see them in ManageBac. What happened?**

   Please review the following information in OpenApply:
   - Student E-mail
   - Student ID
   - Enrolment Year (must be current academic year or before)

   If the Student E-mail or ID is already used on ManageBac, the student will not sync.

2. **I just enrolled a new student in OpenApply. They've synced over to ManageBac but they are missing information.**

   Please double-check the fields you're using on your forms, to confirm that the fields are the correct global fields. If they are custom fields, they are excluded from the sync.

3. **I just enrolled a new student in OpenApply. They've synced over to ManageBac but they didn't get a welcome e-mail.**

   Welcome e-mails are not automatically sent. Please navigate to **Settings > School Directory** to send welcome e-mails.

Parents

1. **My newly enrolled students synced successfully over to ManageBac, but I don't see the parents appearing.**
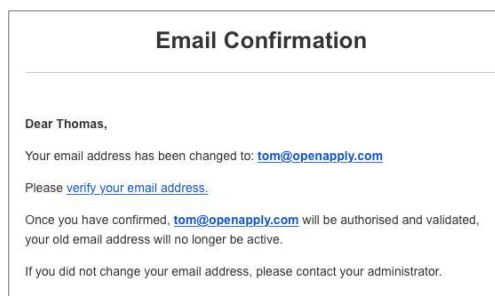
   Only parents with activated OpenApply accounts will sync over to ManageBac.

2. **The parents have synced to ManageBac but they have not received a welcome e-mail.**

   Welcome e-mails are not automatically sent. Please navigate to **Settings > School Directory** to send welcome e-mails.

3. **Parent change e-mail notifications**

   As a security measure, e-mail change notifications are sent out by ManageBac and OpenApply to any parent where the e-mail address has changed.

   Email Confirmation

   Dear Thomas,

   Your email address has been changed to: **tom@openapply.com**

   Please verify your email address.

   Once you have confirmed, **tom@openapply.com** will be authorised and validated, your old email address will no longer be active.

   If you did not change your email address, please contact your administrator.

Miscellaneous

1. **I need to add or remove a year level.**

   We will help you create or remove this new year level. Please do not do this independently.

2. **What is the difference between e-mail activation and verification?**
   We allow user accounts on both ManageBac and OpenApply to be created either individually or in bulk, but users cannot login until their accounts are <u>activated</u>.

   Accounts are activated via a welcome e-mail that invites the user to login and set their password for the first time.

   When a user logs in for the first time, we send a <u>verification</u> e-mail to their e-mail address, to independently confirm the e-mail address is accurate.

   Only verified accounts have access to the Single Sign-On Launchpad.

3. **Can I update account information in bulk?**

   Yes, absolutely. There are a few places in both systems where you can update core information in bulk, either through a bulk edit screen or through a CSV import. We recommend working together with our support team to fix this.

4. **I marked a student as Enrolled in OpenApply, then I marked him as Waitlisted. However, I still see the record in ManageBac.**

   Unfortunately, our systems will sync only students with the following statuses:
   - Enrolled
   - Graduated
   - Withdrawn

   Since **Waitlisted** in OpenApply does not have a corresponding status in ManageBac, it cannot sync. In this case, we recommend either deleting or archiving the ManageBac record until the student is (maybe) Enrolled in the future.

Contact

The primary contact for ManageBac – OpenApply sync is:

ManageBac Support
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