

iSAMS-Faria Integration: Prerequisites

Phase 1 – One Way Sync, iSAMS to ManageBac





Web based MIS for the
entire school community

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Introduction

This document will outline the prerequisites required for an iSAMS school to enable the Faria Integration.

The following process must be followed.

- 01.** Export Student Records from iSAMS with key fields to an excel spreadsheet
- 02.** Send Excel Spreadsheet to ManageBac support Team
- 03.** ManageBac Support Team will compare the iSAMS and ManageBac datasets to ensure duplicate Students are not created when the integration is turned on.
- 04.** ManageBac Support Team to feedback any concerns to the School.
- 05.** Once all concerns have been resolved, ManageBac will contact the iSAMS Support Team to schedule the integration installation.

Configure iSAMS School Code settings

All schools must ensure the iSAMS School Code is unique. We recommend the School Code is automatically generated before enabling the integration.

If “Update Empty School Codes” is used, please make sure the individual ManageBac Student IDs are updated and share the same unique codes.

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

The screenshot shows the 'Pupil Manager' interface with the 'Management Options' tab selected. The 'General Options' section includes fields for 'School Age' (1), 'September', and '2016', with a note: 'The School Age is created from the date on the left. It usually is changed at the beginning of term to the start of relevant months.' Other options include 'Show Family Tree' (checked), 'Show Deceased Contacts' (checked), 'Require a Pupil Title' (unchecked), 'Require a Unique School Code' (checked with a red circle '1'), and 'Use Autocomplete by default' (checked). A dropdown for 'SC Required ADM Statuses' is open, showing options like '+4 Accepted', 'Denied', 'Enquiry', etc. An 'Update' button is at the bottom.

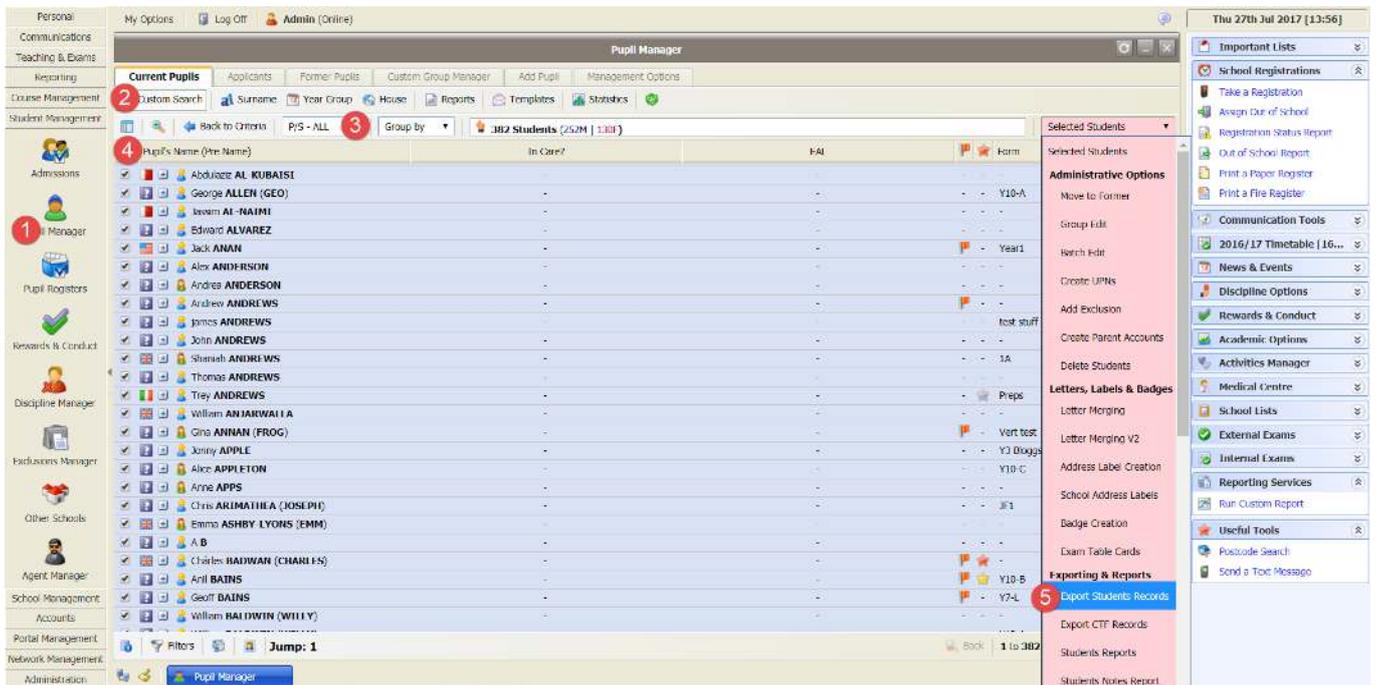
The 'School Code Options' section includes 'Enable Automatic School Code' (checked with a red circle '2'), 'School Code Prefix' (BBTS), 'School Code Suffix' (X), 'Start From' (2229), 'School Code Number Length' (10, with a note 'Excluding Prefix & Suffix'), 'Allow override' (unchecked), and 'Update Empty School Codes' (checked with a red circle '3'). An 'Update' button is at the bottom.



Exporting Student information from iSAMS

- 01. Navigate to Student Manager
- 02. Search for all Students
- 03. Change page size to All
- 04. Select all students
- 05. Use the pink drop down list and select the option “Export Student Records”

See below



01. Create a new Export

02. Next

Export Records - Google Chrome

Secure | <https://demo.isams.cloud/modules/studentmanagement/export/exportpreview.asp?view=Current>

Cancel & Close | Back to Start

Export Manager - Step 1 of 4

Would you like to use an saved, shared or new export? Use the tools below to manage your exports.

Export Options (3)

1 **Create new export using new fields and options.**

➔ This option is chosen by default - it should be used if you want to export fields that you have not used before or want to create a new report.

Use an existing export that I created and saved.

➔ You have 5 previous Export Options to choose from. Select the option above to show the ones available to you.

Use a shared export that I or someone else created.

➔ There are 28 shared export options for you to choose from. Select the option above to show the ones available to you.

2 Next > | Cancel

You selected **382** Students



Field Section

Please make sure the following fields have been included for the Export. Only students who have a unique **School Code** field in iSAMS will be considered for the integration.

01. Core Data Fields

- i) Date of Birth
- ii) Forename (Firstname)
- iii) Preferred Name
- iv) Surname

02. Current Fields*

- i) School Code
- ii) Year Group (NC)
- iii) Student Email address
- iv) Student Nationality data

Use the next screen shot for reference.

* Please note, required fields might be listed in categories other than Current Fields.

Export Records - Google Chrome
- □ ×

Secure | <https://demo.isams.cloud/modules/studentmanagement/export/exportpreview.asp?view=Current>

Cancel & Close | Back to Start

Field Selection - Step 2 of 4

Select the fields you want to include in the Export - some fields will be selected by default as these form the basics of a students core data.

▼ **Core Data Fields** 1 (Contains 13 fields which are the Core values)

 Select All | Clear All

Date of Birth <input checked="" type="checkbox"/>	Forename (Firstname) <input checked="" type="checkbox"/>	Full Name <input type="checkbox"/>	Gender <input type="checkbox"/>
Initials <input type="checkbox"/>	Label Salutation <input type="checkbox"/>	Letter Salutation <input type="checkbox"/>	Middle Names <input type="checkbox"/>
Preferred Name <input checked="" type="checkbox"/>	Surname <input checked="" type="checkbox"/>	Title <input type="checkbox"/>	Todays Age <input type="checkbox"/>

▶ **Contacts Fields** (Contains 31 fields relevant to Contacts)

▶ **Custom Contact Fields** (Contains 1 custom fields relevant to Contacts)

▶ **Admissions Fields** (Contains 47 fields relevant to Applicants)

▼ **Current Fields** 2 (Contains 64 fields relevant to Current Students)

 Select All | Clear All
 Select a 'Current' Default ▼

Academic House <input type="checkbox"/>	Account Code <input type="checkbox"/>	Acedemic Category <input type="checkbox"/>	Additional Health <input type="checkbox"/>
Additional Time <input type="checkbox"/>	Allergy <input type="checkbox"/>	Allergy Notes <input type="checkbox"/>	Asthmatic Notes <input type="checkbox"/>
Blood Group <input type="checkbox"/>	Boarding House <input type="checkbox"/>	Candidate Code <input type="checkbox"/>	Candidate Forenames <input type="checkbox"/>
Candidate Number <input type="checkbox"/>	Candidate Surname <input type="checkbox"/>	Dental Information <input type="checkbox"/>	Diabetes <input type="checkbox"/>
Diabetes Notes <input type="checkbox"/>	Doctor <input type="checkbox"/>	Doctor Name <input type="checkbox"/>	Doctors Phone Number <input type="checkbox"/>
Duplicate Reports <input type="checkbox"/>	Enrolment Date <input type="checkbox"/>	Epilepsy <input type="checkbox"/>	Epilepsy Notes <input type="checkbox"/>
Form <input type="checkbox"/>	Form Tutor <input type="checkbox"/>	Future School Name <input type="checkbox"/>	Future School Type <input type="checkbox"/>
Glasses? <input type="checkbox"/>	Insurance Company <input type="checkbox"/>	Insurance Expiry Date <input type="checkbox"/>	Insurance Number <input type="checkbox"/>
Leaving Date <input type="checkbox"/>	Leaving Form <input type="checkbox"/>	Leaving Reason <input type="checkbox"/>	Leaving School Year <input type="checkbox"/>
Leaving Term <input type="checkbox"/>	Leaving Year Group <input type="checkbox"/>	Left or Right <input type="checkbox"/>	NHS Number <input type="checkbox"/>
Other Medical <input type="checkbox"/>	Other Medical Information <input type="checkbox"/>	Passport Number <input type="checkbox"/>	Passport Type <input type="checkbox"/>
Peg Number <input type="checkbox"/>	Personal Tutor <input type="checkbox"/>	Previous School Name <input type="checkbox"/>	Scholarship Interest List <input type="checkbox"/>
Scholarship List <input type="checkbox"/>	Scholarship Notes <input type="checkbox"/>	School Code <input checked="" type="checkbox"/>	School Pupil Type <input type="checkbox"/>
Special Requirements <input type="checkbox"/>	Student Contact Notes <input type="checkbox"/>	Student Email Address <input type="checkbox"/>	Student Pager Number <input type="checkbox"/>
StudentMobileNumber <input type="checkbox"/>	Tetanus <input type="checkbox"/>	Vaccine Information <input type="checkbox"/>	Withdrawn Date <input type="checkbox"/>
Year Group (NC) <input checked="" type="checkbox"/>	Year Group Code <input type="checkbox"/>	intasthmatic <input type="checkbox"/>	txtdental <input type="checkbox"/>

▶ **Census Fields** (Contains 8 fields relevant to Census or Statistical Analysis)

▶ **Custom Fields** (Contains 69 custom fields)

▶ **Left footed footballers Fields** (Contains 2 field(s))

▶ **Looked After Fields** (Contains 4 field(s))

▶ **Looked After Fields** (Contains 3 field(s))

▶ **Special Educational Needs Fields** (Contains 2 field(s))

▶ **Special Educational Needs Fields** (Contains 2 field(s))

▶ **Other Fields** (Contains 10 fields relevant to Other types of data)

< Back
Next >
Cancel

You selected **382** Students



Saving and Exporting an Integrations Dataset

- 01. Make sure Export to Microsoft Excel is selected
- 02. Optional – Save the Export Report to be used quickly again if concerns are raised by ManageBac Support Team.
- 03. Create Export

Cancel & Close Back to Start

Export Options - Step 3 of 4

Would you like to use an saved, shared or new export? Use the tools below to manage your exports.

Order Results By:

Order By: Then: Then:

You can customise the sort order so the export is displayed in the correct format. By default it goes: **SURNAME** then **FORENAME**.

Export Format:

- 1** **Export to Microsoft Excel (.xls)**
 This option is chosen by default - this will put the results into an Excel Spreadsheet which can be opened and viewed using Microsoft Excel.
- Export to Comma Separated Values (.csv)**
 This option allows you to put the results into CSV format which is very useful for importing into other software programs or databases.
- Export to Tabbed Text File (.txt)**
 This puts the results into a plain text file which is separated by Tabs.

Save Export:

2 Check to Save this Export - its fields and options for future use.

Export Name:

Export Desc:

Export Group:

Shared Export: Check if this Selection List can be viewed by others
 Check if this Selection List can be edited by other users

No Duplicate Found

Integration Dataset does not already exist in the Database.

< Back Create Export **3** Cancel

You selected **382** Students



Contact ManageBac Support

01. Download and Save the iSAMS Integrations Dataset.
02. Email support@managebac.com with the following template and include the Excel Spreadsheet as an attachment

Email Subject: Data for iSAMS Integration

Dear ManageBac Support Team,

We would like to start the iSAMS Integrations Setup process. Attached is our iSAMS Integrations Dataset, please can this be used and compared to our Students within ManageBac.

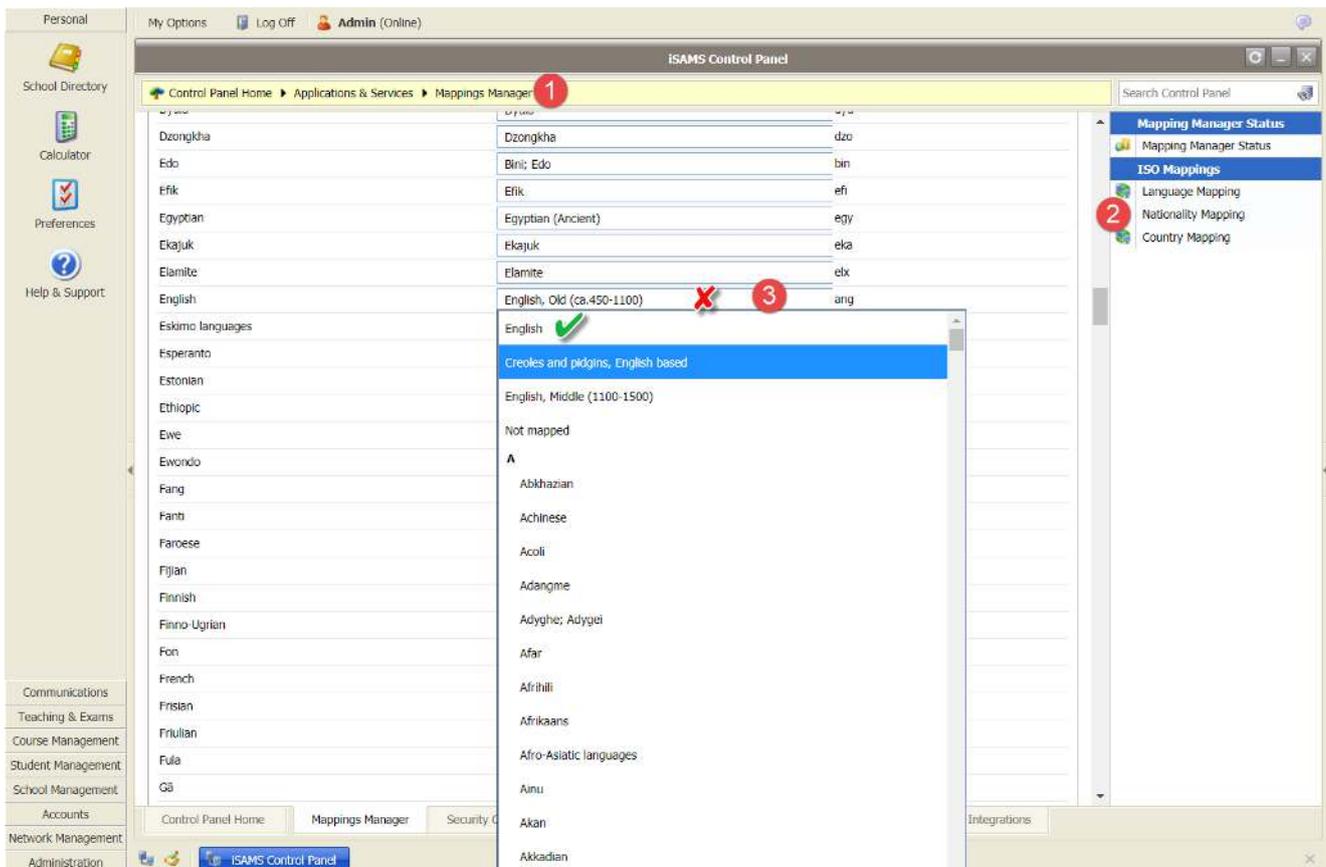
Kind regards,



Configure iSAMS Mapping Manager

iSAMS allows schools to create personalised countries, languages and nationalities. We need to ensure this information has been mapped correctly in Mapping Manager otherwise it will not be possible to send this information to ManageBac.

- 01. Navigate to iSAMS Control Panel > Mapping Manager
- 02. Repeat these steps for Language, Nationality and Country Mapping
- 03. Make sure the correct ISO value is selected e.g. the below example shows English, old being mapped which is incorrect.



Note The “Auto Map Unknown” feature can be used to speed up this process. But please check each value afterwards to ensure they are correct.



Next Steps

- 01.** Once all linking concerns have been resolved, a ticket will be raised with the iSAMS Support Team by ManageBac including the Schools key contacts requesting for the Integration to be enabled.
- 02.** iSAMS will place your request in a queue to be managed.
- 03.** A member of the iSAMS Technical Support Team will contact you to schedule a time which is convenient to enable the integration.
- 04.** iSAMS will be placed in maintenance mode. This will stop all members of staff from logging into iSAMS until the Integration setup process is completed. We estimate the downtime will be 1-4 hours and is dependent on the Schools Student numbers.

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