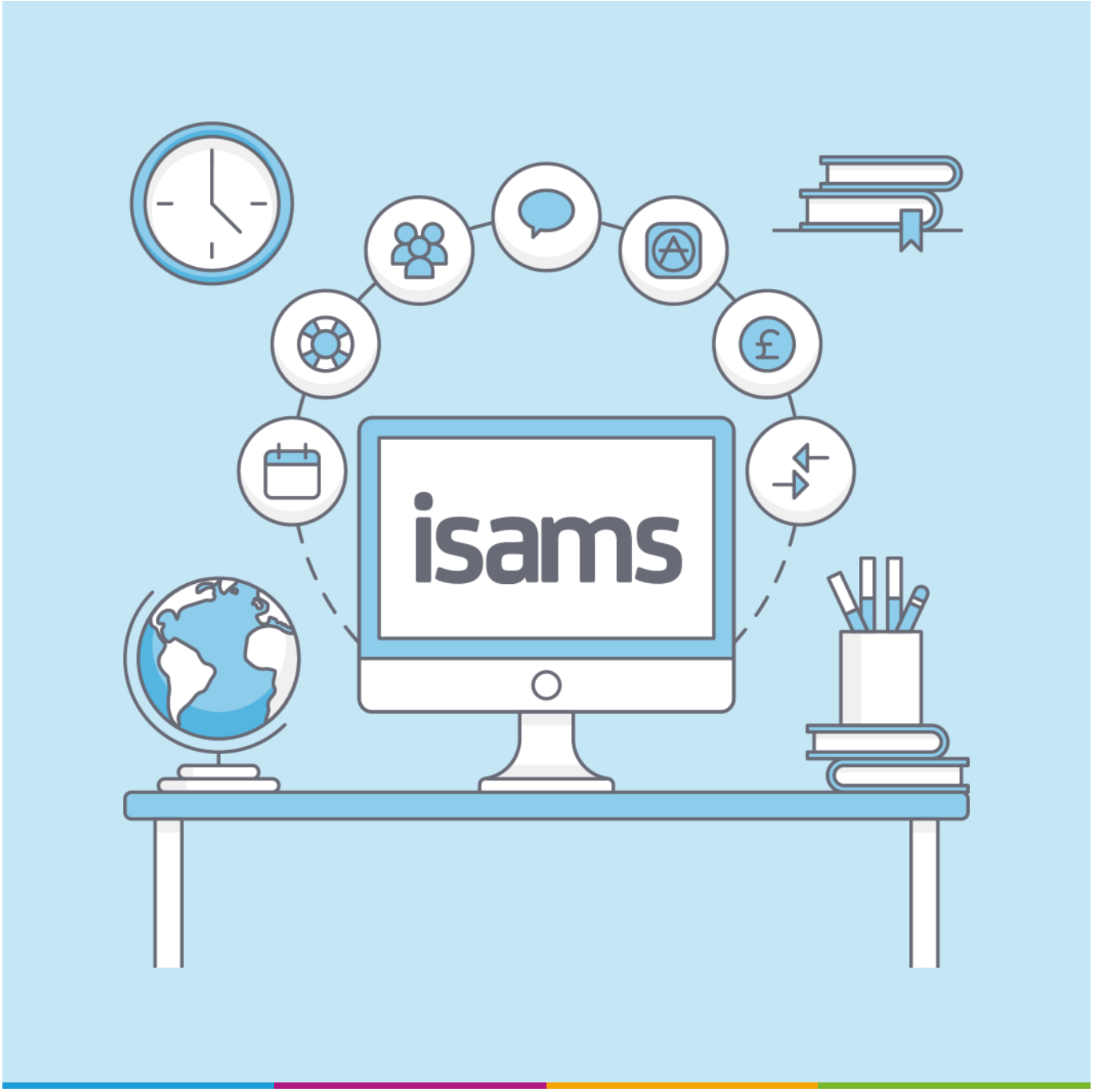
isams

Web based MIS for the entire school community

iSAMS-Faria Integration: Prerequisites

Phase 1 – One Way Sync, iSAMS to ManageBac



isams

Web based MIS for the
entire school community

Table of Contents

Introduction	**3**
Configure iSAMS School Code settings	**4**
Exporting Student information from iSAMS	**5**
Field Section	**7**
Saving and Exporting an Integrations Dataset	**9**
Contact ManageBac Support	**10**
Configure iSAMS Mapping Manager	**11**
Next Steps	**12**

Download on the App Store GET IT ON Google Play

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

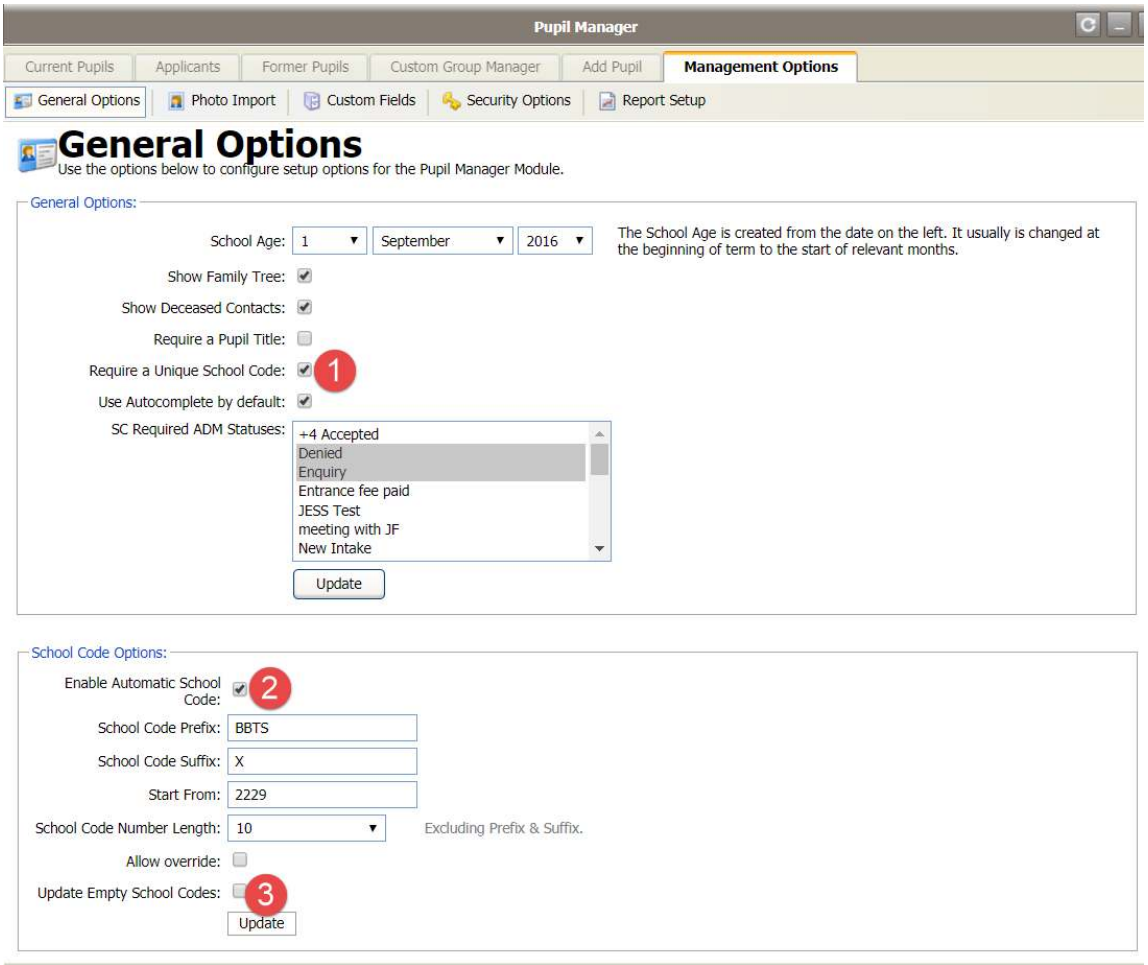
All schools must ensure the iSAMS School Code is unique. We recommend the School Code is automatically generated before enabling the integration.

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



Exporting Student information from iSAMS

01. Navigate to Student Manager

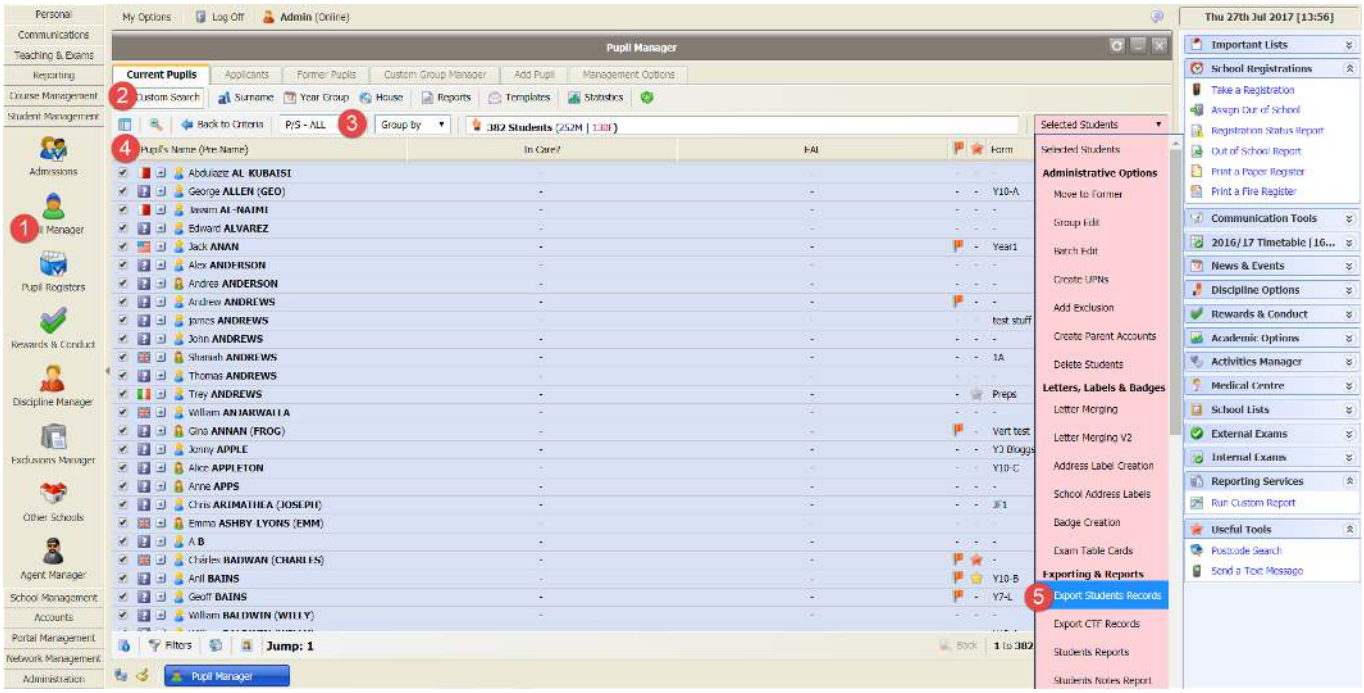
02. Search for all Students

03. Change page size to All

04. Select all students

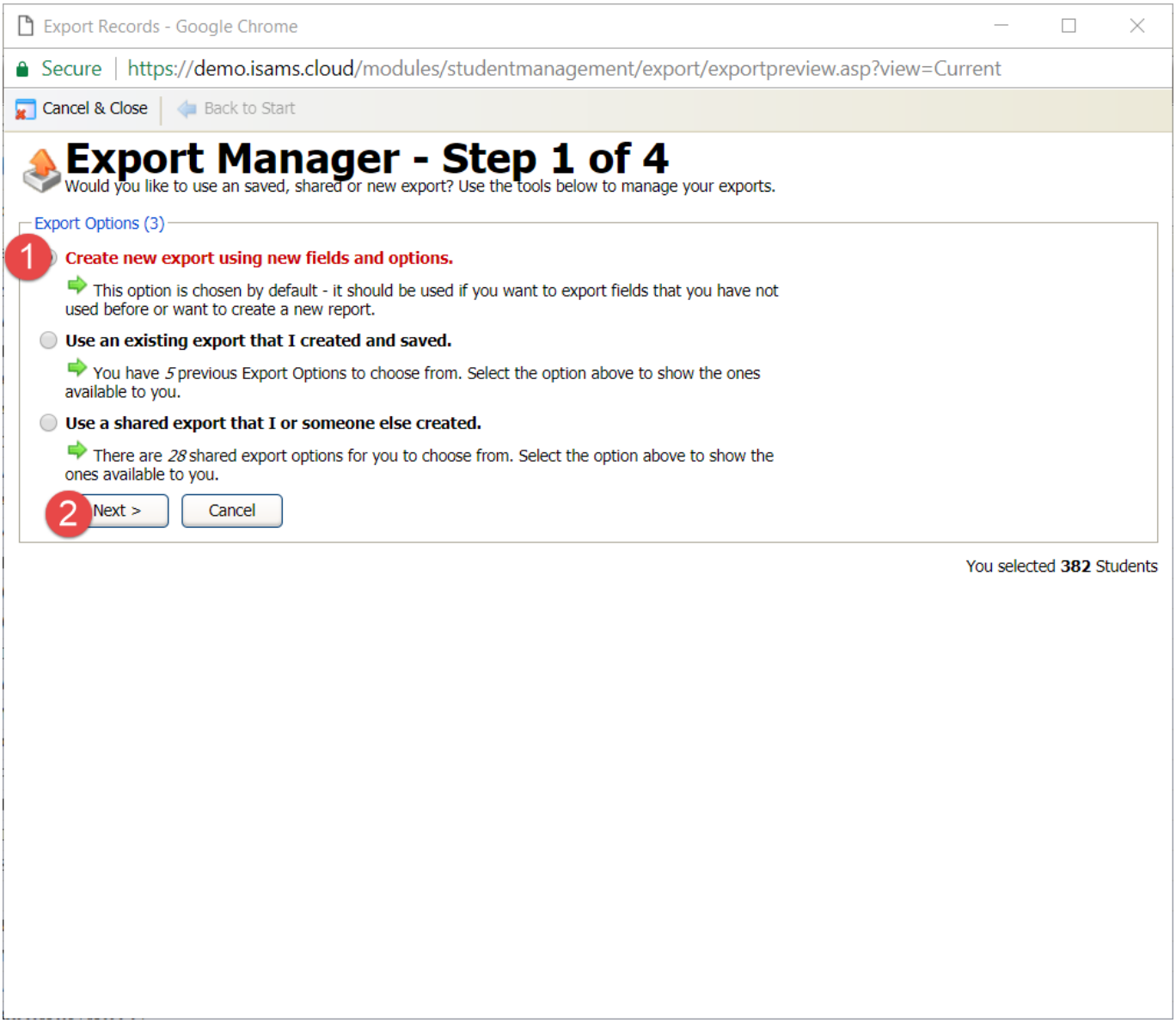
05. Use the pink drop down list and select the option “Export Student Records”

See below



01. Create a new Export

02. Next



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.

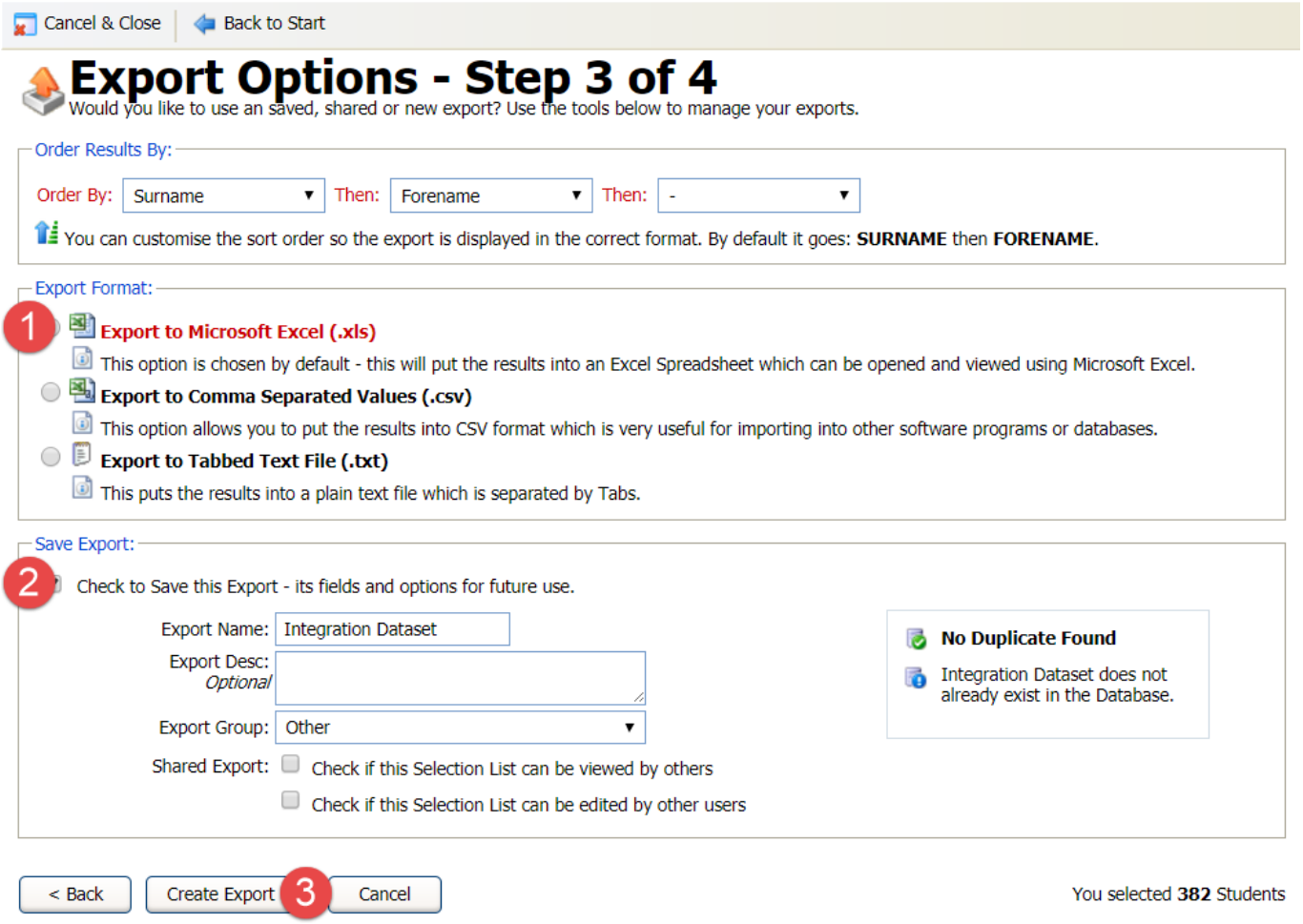
Export Records - Google Chrome
Secure | https://demo.isams.cloud/modules/studentmanagement/export/exportpreview.asp?view=Current
Cancel & Close
Back to Start
Field Selection - Step 2 of 4
Select the fields you want to include in the Export - some fields will be selected by default as these form the basics of a students core data.
1
Core Data Fields (Contains 13 fields which are the Core values)
Select All | Clear All
Date of Birth
Forename (Firstname)
Full Name
Gender
Initials
Label Salutation
Letter Salutation
Middle Names
Preferred Name
Surname
Title
Todays Age
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)
2
Current Fields (Contains 64 fields relevant to Current Students)
Select All | Clear All
Select a 'Current' Default
Academic House
Account Code
Acedemic Category
Additional Health
Additional Time
Allergy
Allergy Notes
Asthmatic Notes
Blood Group
Boarding House
Candidate Code
Candidate Forenames
Candidate Number
Candidate Surname
Dental Information
Diabetes
Diabetes Notes
Doctor
Doctor Name
Doctors Phone Number
Duplicate Reports
Enrolment Date
Epilepsy
Epilepsy Notes
Form
Form Tutor
Future School Name
Future School Type
Glasses?
Insurance Company
Insurance Expiry Date
Insurance Number
Leaving Date
Leaving Form
Leaving Reason
Leaving School Year
Leaving Term
Leaving Year Group
Left or Right
NHS Number
Other Medical
Other Medical Information
Passport Number
Passport Type
Peg Number
Personal Tutor
Previous School Name
Scholarship Interest List
Scholarship List
Scholarship Notes
School Code
School Pupil Type
Special Requirements
Student Contact Notes
Student Email Address
Student Pager Number
StudentMobileNumber
Tetanus
Vaccine Information
Withdrawn Date
Year Group (NC)
Year Group Code
intasthmatic
txtdental
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



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,

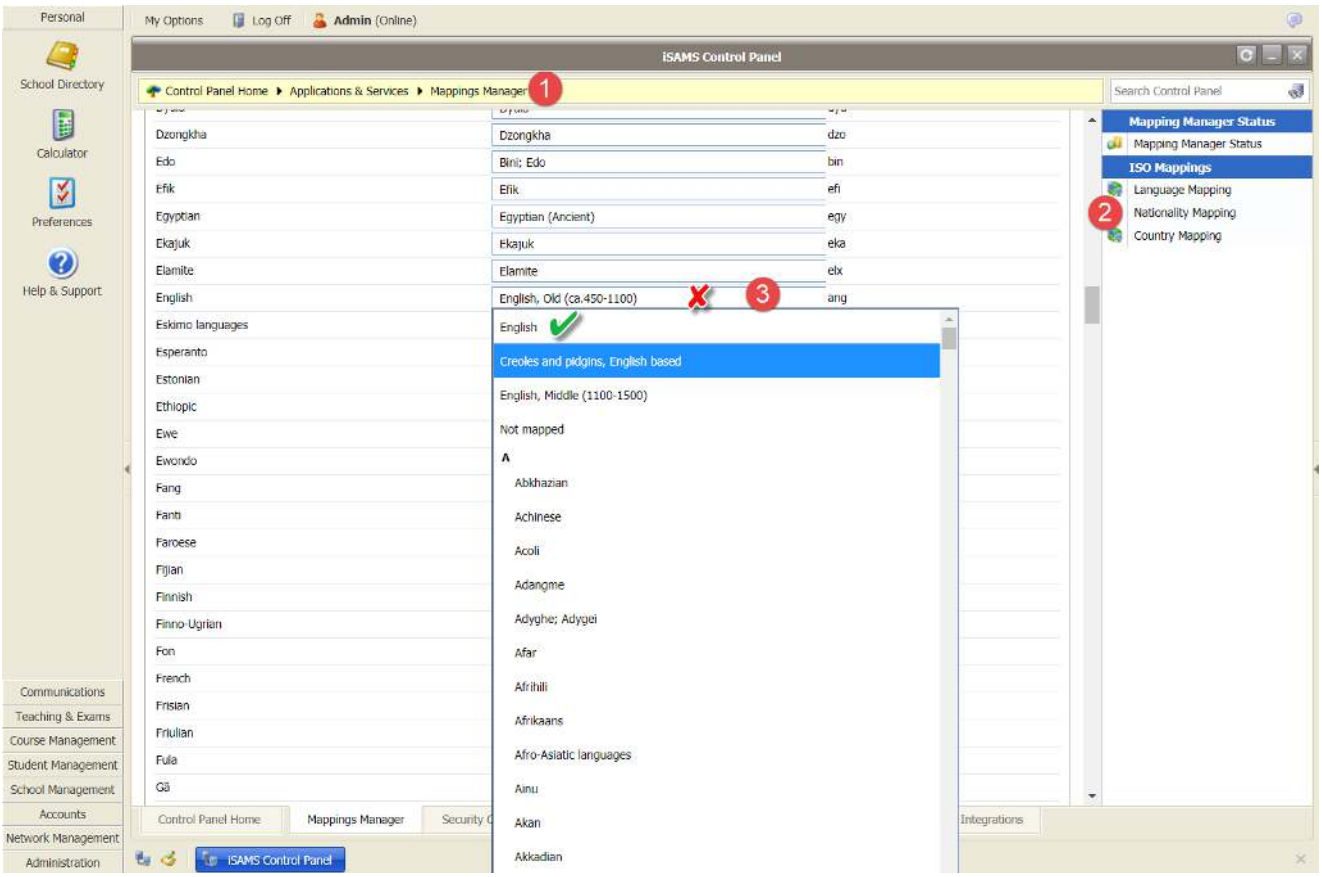
Configure iSAMS Mapping Manager

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.

9 Talavera Court, Darnell Way
Moulton Park, Northampton
NN3 6RW, United Kingdom

T +44 (0)1604 659100
E sales@isams.com
W www.isams.com