Faria Systems

Syncing SchoolsBuddy & ManageBac

This is an introduction & a guide to the process of synchronizing data from ManageBac to SchoolsBuddy accounts.

September 2022

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Syncing SchoolsBuddy & ManageBac **1**

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Introduction

The integration between ManageBac and SchoolsBuddy allows schools to:

- Automatically create SchoolsBuddy accounts for students and their parents
- Automatically create SchoolsBuddy accounts for staff members
- Maintain, withdraw or graduate students in ManageBac, with changes reflected in SchoolsBuddy the next day
- Maintain parent and staff records in ManageBac, with changes reflected in SchoolsBuddy the next day
- Access consistent demographic data for students and parents
- Monitor and resolve duplicate or conflicting account information
- Login to SchoolsBuddy via ManageBac single sign-on for administrators, parents and students

Integration Scope

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

Once enabled, data will sync every twenty-four hours between 1:00 - 3:00am in the default timezone for the server region (UTC in EMEA, UTC -5 in US, UTC +8 in Asia).

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 2022-2023 will not sync.)
2. Students with status **Withdrawn*** or **Graduated** are either not imported to SchoolsBuddy, or, if they were previously **enrolled,** they will be updated to '**deleted**', the archived state, in SchoolsBuddy.

The integration allows for three actions:

1. **User Creation:** If a student is marked as Enrolled in ManageBac an account will be created on SchoolsBuddy, together with their parents.
    a. New students created in SchoolsBuddy will appear in the correct year level, assigned to the relevant teacher's homeroom.
    b. ManageBac Id/ Student Id will be displayed on the SchoolsBuddy record for students, parents & staff. Contact Support if you would like the ID to be switched to Student ID.
    c. Welcome emails are not sent immediately when users are created. Administrators must activate users for them to begin receiving email notifications and they can either set a password or use ManageBac SSO to set up their online account.
    d. Student emails can be blocked if the school does not want any students to access SchoolsBuddy themselves or receive communications. If the school has mixed access (e.g. younger & older years) you do not have to activate younger students accounts in SchoolsBuddy.
2. **User Update:** A user's demographic details (e.g. phone number) may be updated in ManageBac. During sync, this will transfer to SchoolsBuddy.

3. **User Archive:** If a student is marked as Withdrawn* or Graduated in ManageBac, they are soft deleted in SchoolsBuddy and the record remains in an archived state. If the student returns to the school and is reactivated with the same ID in ManageBac their account will automatically be reactivated in SchoolsBuddy. Parent accounts are disabled when the student is withdrawn/graduated (if those parents do not have any other enrolled children at the school).

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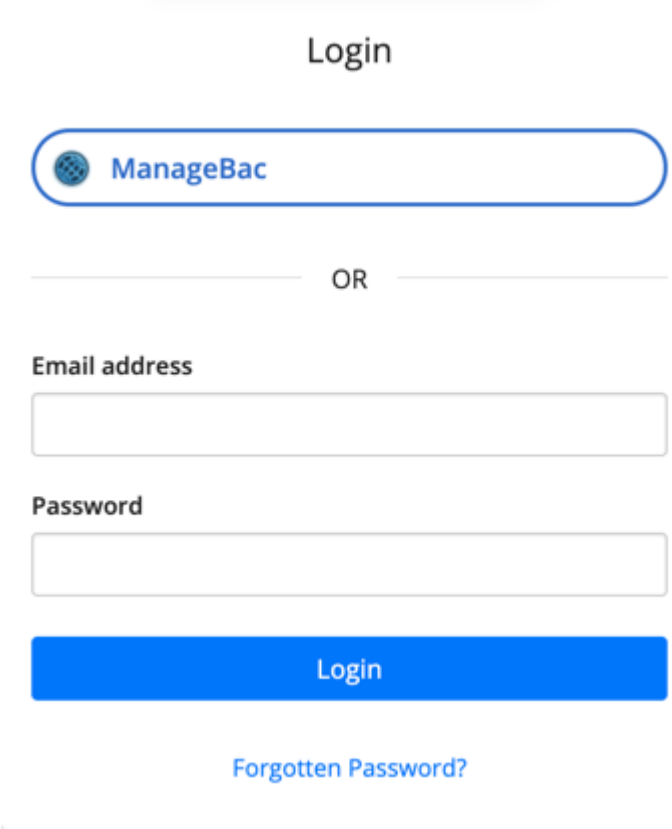
* Please note that **Withdrawn** is interpreted as an enrolled student who departed the school.

Single Sign On

We additionally provide complimentary **Single Sign-On** via our Login page. This can be enabled / disabled in SchoolsBuddy's **Settings > FariaOne** page.



Users with verified email addresses in our systems and / or our partner systems can easily move between systems without needing to separately login. This includes all user types: Staff, parents and students.

New users accounts are synced to SchoolsBuddy with the nightly sync, between 1:00 - 3:00am in the default timezone for the server region (UTC in EMEA, UTC -5 in US, UTC +8 in Asia).

Please note that parents or students using weak passwords will not be able to use Single Sign-on - the Accounts portal password criteria is set at the standard ManageBac password level for security.

Availability

The **ManageBac – SchoolsBuddy** integration is currently complimentary for all SchoolsBuddy schools, including schools on trial.

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Which fields sync?

Student

First Name*
Preferred Name
Last Name*
Date of Birth*
Gender*
Email
Address (Optional, Off by default)

ManageBac System ID*
Student ID
Enrollment Status (used not stored)
Year / Grade
Homeroom Advisor
Subject Classes
Avatar/photo

Parent

First Name*
Last Name*
Email / Mobile* **

ManageBac ID*
Status (linked to student)
Address (Optional, Off by default)

Staff

First Name*
Last Name*
Email*

ManageBac ID*
Status (used not stored)
Gender (invalid, hidden, not used)
Date of Birth (invalid, hidden, not used)

*Required fields for sync
** Parents can be synced with either contact method, only one required. If no email address present a dummy email will be generated. If no mobile number is present only email address is synced. Parents can not access SchoolsBuddy without an email address.

Gender is required for SchoolsBuddy as activity signups can be limited by gender (for example, Swimming clubs)

If Date of Birth is not supplied, SchoolsBuddy will display a default date on a student profile.

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Where can I see the data?

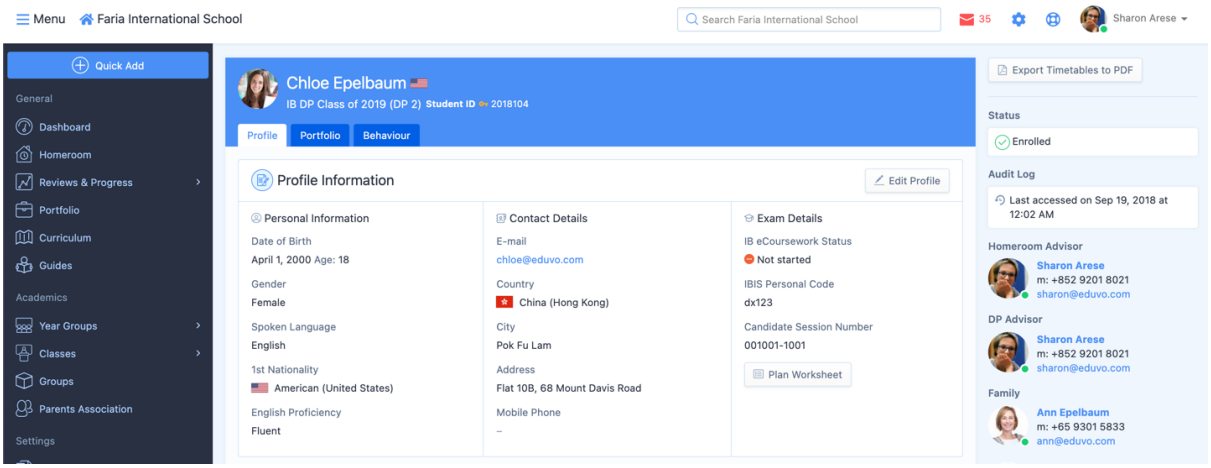
ManageBac

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

Student Profile

The fields shown in Personal Information & Contact Details sync with SchoolsBuddy, with the exception of:

- Middle Name
- Spoken Language
- English Proficiency
- 1st Nationality
- Mobile Phone



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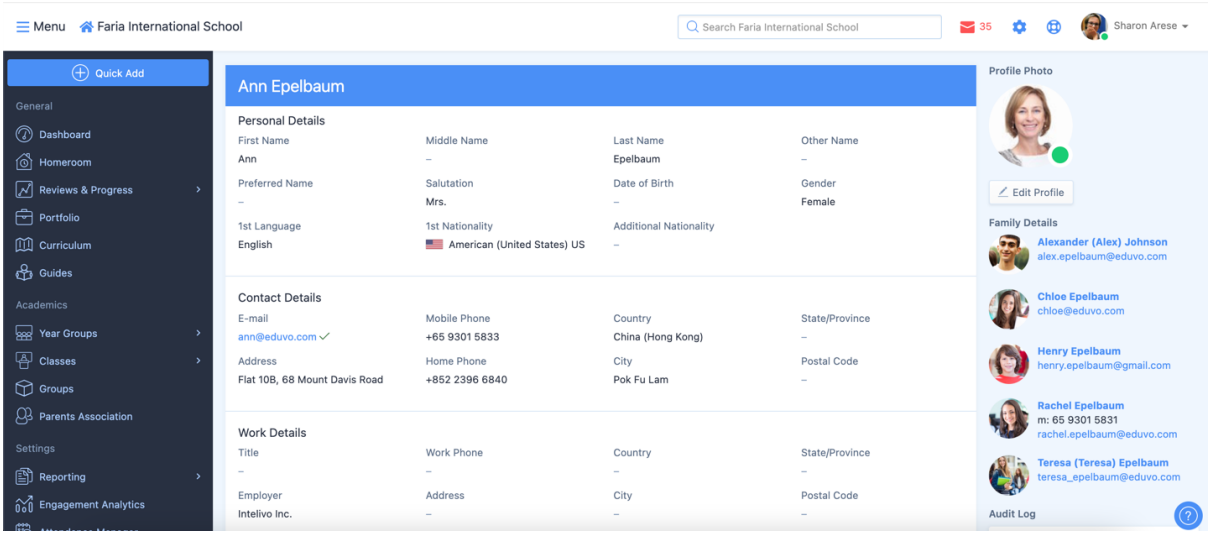
Parent Profile
The fields shown in this screenshot sync with SchoolsBuddy, with the exception of:

- Middle Name
- Preferred Name
- Other Name
- Date of Birth
- Gender
- 1st Language
- 1st & 2nd Nationality
- UI Language
- Country
- Address I & II
- City
- Work Details



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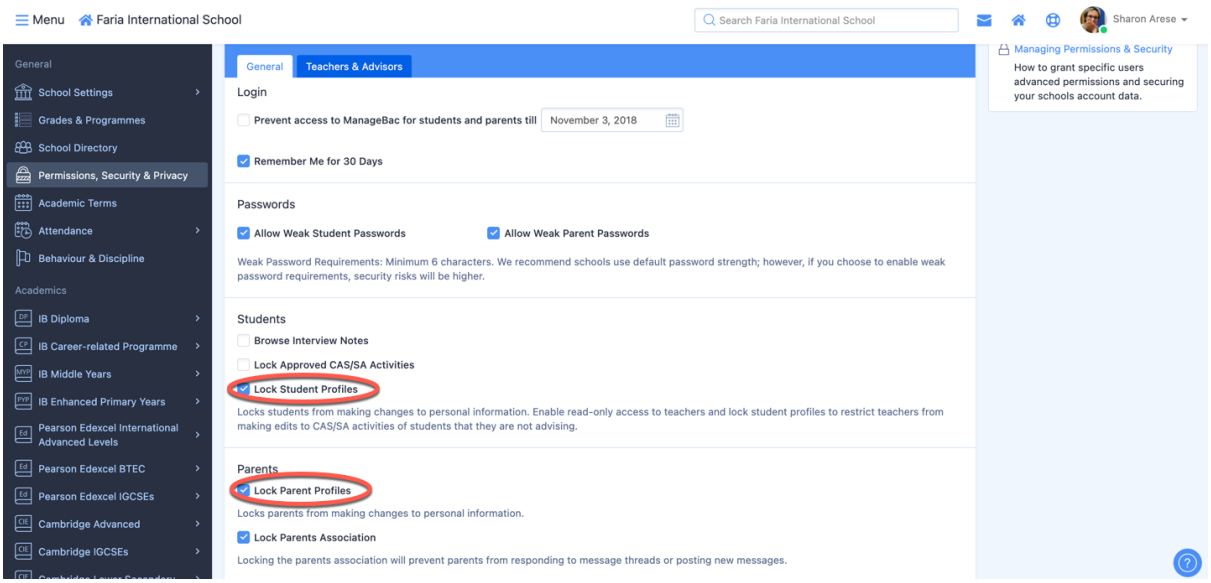
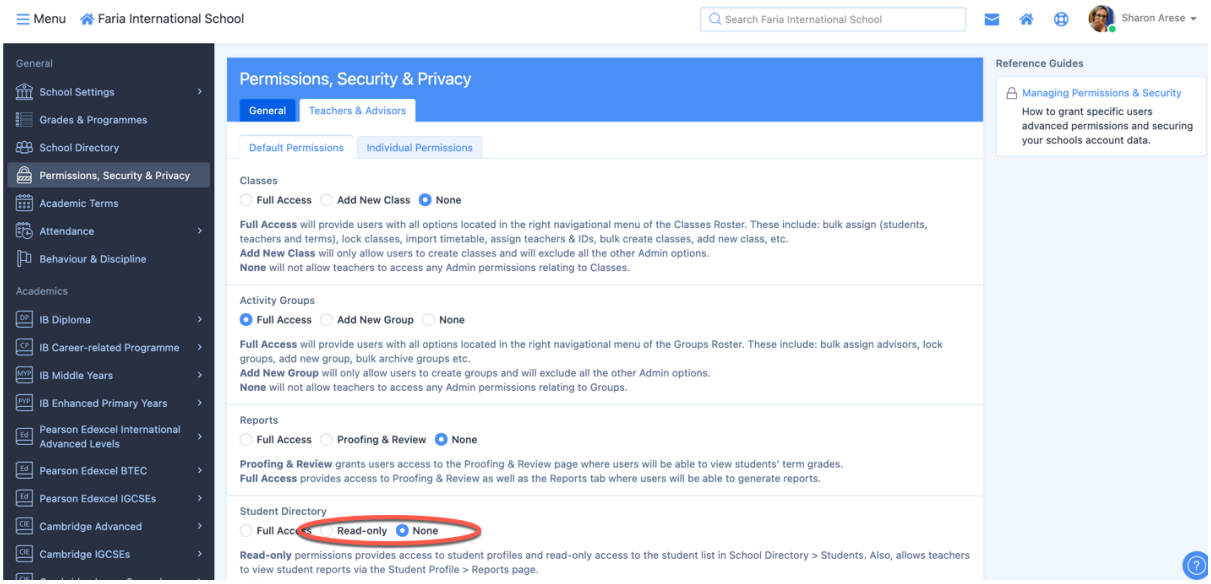
Important Note:
By default, parents and students may edit their own profile information. Teachers may also have the ability to edit student profile information.

To lock this and restrict editing to administrators only, please navigate to **Settings > Permissions, Security & Privacy> General**



We recommend restricting teacher access to **Read-only**, and locking access for students and parents.



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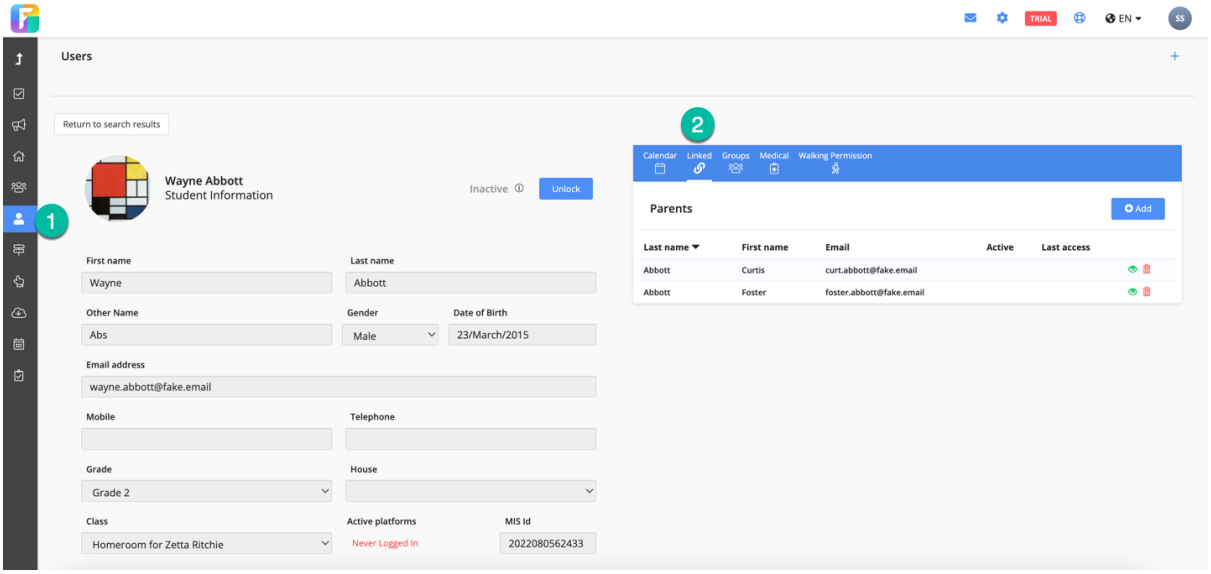
Navigate to an individual student user profile via **Reception > Users**



(2) Click on Linked to view links to parent profiles

The sync from ManageBac to SchoolsBuddy is one way, so changes applied in the SchoolsBuddy UI will be overwritten if they are not updated in ManageBac as well. Therefore we recommend updating ManageBac as a single point of control.

Important Note:
Homeroom/Registration Class groups in SchoolsBuddy are created from the student's relationship to a homeroom adviser in ManageBac. There is currently no "group" type in ManageBac that can be identified as a homeroom/ registration class.

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Configuration Requirements

To configure the integration please confirm the school's ManageBac URL and the SchoolsBuddy team will do the rest.

To enable a successful sync between ManageBac and SchoolsBuddy accounts, the following conditions must be met:

Checklist

1. All student, parent & staff **email addresses** must be unique.

2. All student **IDs** must be unique.

3. All subject class **IDs** must be unique.

4. Student **IDs** must not be re-used when the first user has been withdrawn/graduated.

5. Student gender to be completed in ManageBac prior to sync. This is because activity signups can be limited by gender in SchoolsBuddy (e.g. Swimming).

6. If student date of birth is not completed in ManageBac, SchoolsBuddy will assign a default date to all students.

SchoolsBuddy Support monitor for data sync failures on a daily basis and will notify the school of any inconsistencies in the data which need to be resolved.

API Token Generation

The SchoolsBuddy team will activate your API token in ManageBac, **Settings > Integrations > Partners.** Please don't edit or delete the token stored in ManageBac as this will disrupt the regular sync updates.

SchoolsBuddy will contact you to confirm when the data integration is operational.

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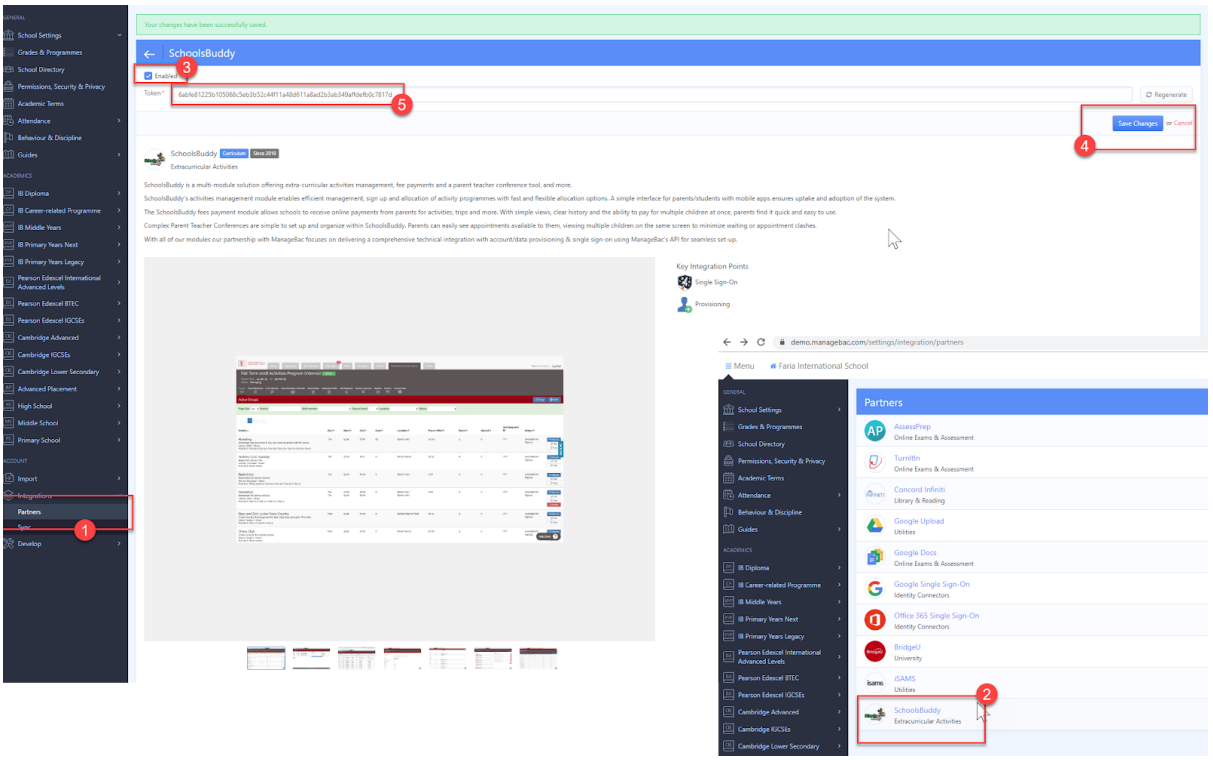

Timeline

It usually takes around 30-40 minutes to sync the data for the first time for a school with over 1000 students. Subsequent data syncs can be much quicker as only updates will be synced.

Before syncing data, the ManageBac team will perform data quality analysis in Managebac and the SchoolsBuddy onboarding team will inform your school if any problems are found (e.g. suspected duplicates). The SchoolsBuddy team will arrange an initial onboarding meeting in which you will be shown how to review the **Reception> Users** roster and validate that data has synced accurately. If there are obvious configuration errors, like multiple missing parent accounts, the SchoolsBuddy onboarding team will flag these to the school for review.

Years Mapping

Schools can enable up to 16 year levels on ManageBac and SchoolsBuddy. SchoolsBuddy does not limit the amount of year/ grade levels.

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

ManageBac

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

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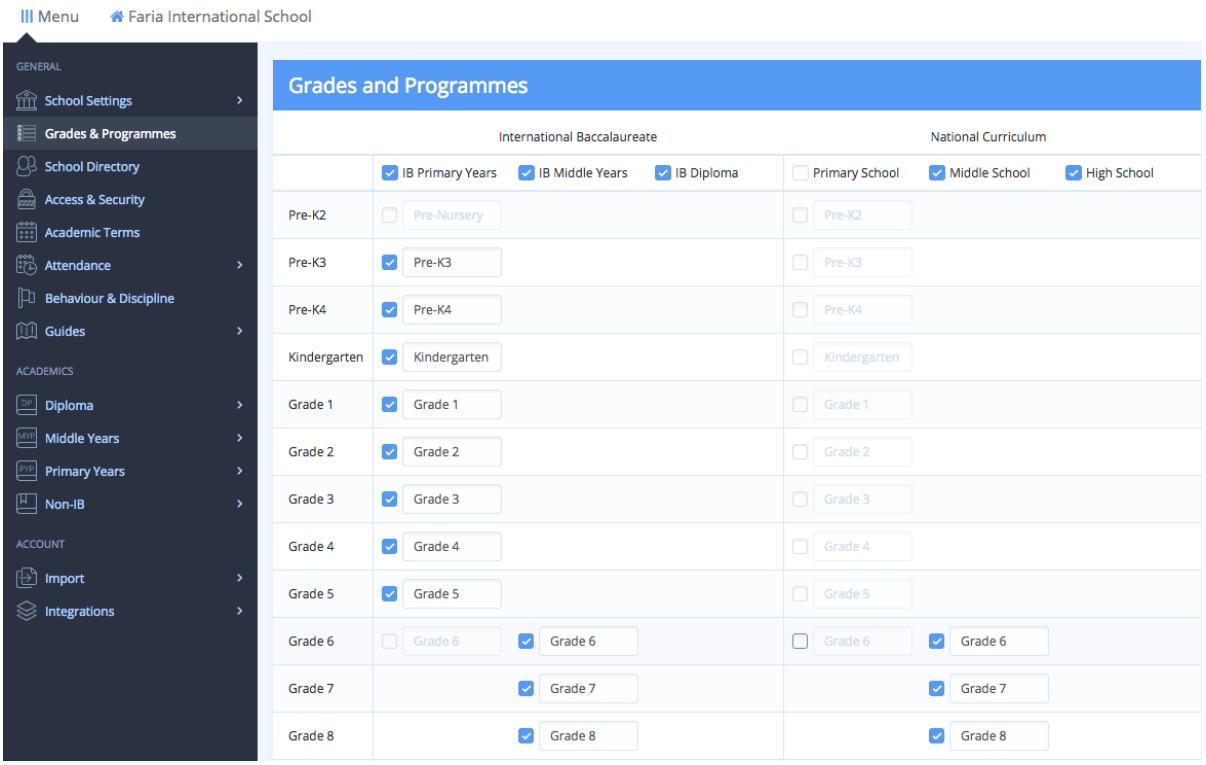
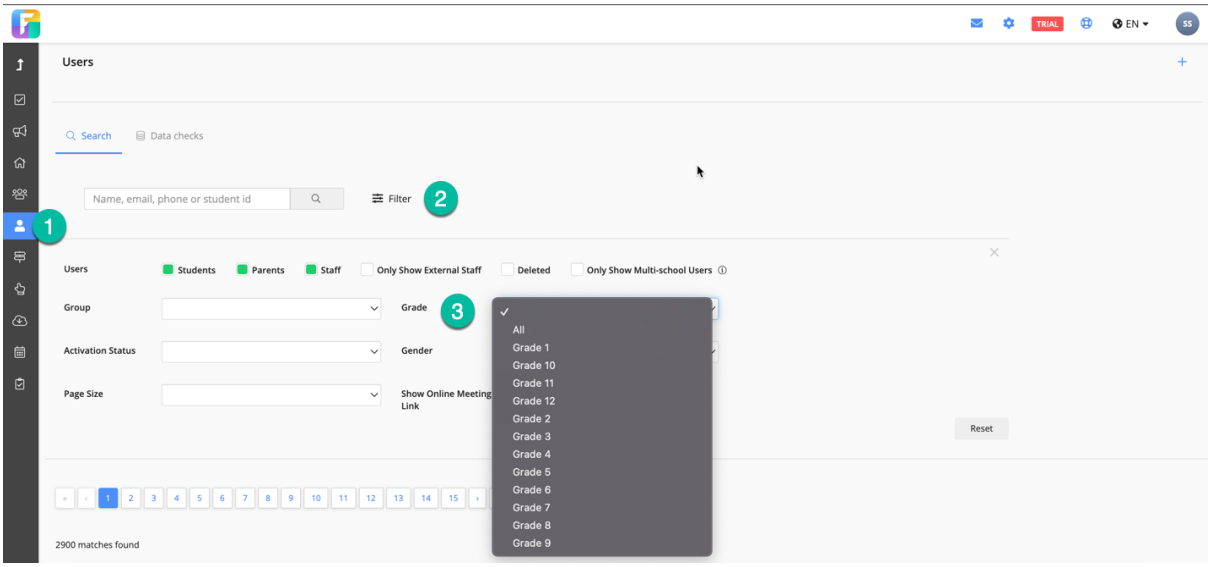


Note that as part of our commitment to supporting the full range of international and national curricula, schools may enable grade levels for multiple programmes, e.g. if the MYP is offered alongside a national curriculum.

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

SchoolsBuddy

To review your enabled years on SchoolsBuddy, please navigate to: **Reception > Users**, open the filters and view the **Year / Grade** dropdown menu:



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Important Note:

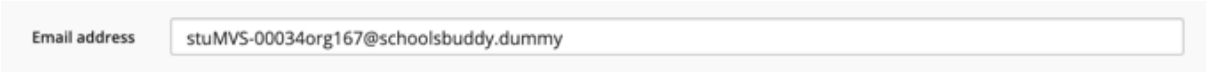
There must be a 1 to 1 correlation between your year levels in order to enable sync. We cannot currently support a partial sync (e.g. It is not possible to have 10 year levels enabled on ManageBac, and sync only 2 year levels to SchoolsBuddy.)

E-mail Addresses

SchoolsBuddy does not require students to have an email address. ManageBac requires all students except "IB Primary Years" Programme students to have email addresses. These students will have dummy email addresses generated which will be delivered to SchoolsBuddy.

Schools can choose to block student email addresses from being imported to SchoolsBuddy; this is a blanket setting and cannot be different for selected years/programmes, although students can be imported with dummy email addresses from ManageBac.

If an email address is not added to SchoolsBuddy a dummy email address will be generated automatically as a placeholder.



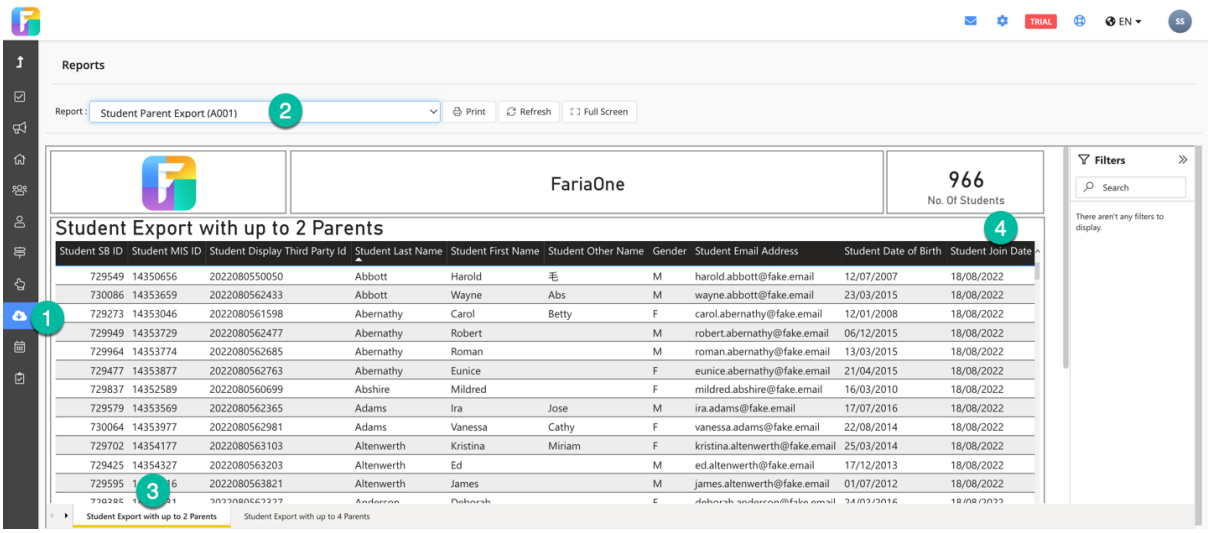
SchoolsBuddy also does not require parents to have an email address; if a mobile phone number is the only contact record available, the parent will still be synced to SchoolsBuddy. A dummy email address will be generated automatically as a placeholder. However, all ManageBac parent records require an email address.

Verifying Email Addresses on SchoolsBuddy

Navigate to **Reception > Reports** to view and download the **Parent Student Export:**

All of our reports are exportable. Hover in the right hand corner of the data window and click on the **...** icon. After clicking **...** the option to **Export Data** appears and the report can be downloaded to Excel for viewing/ printing as required.

Please note: This export contains the Student and up to four parent/guardian records; it is possible to store more than two contacts for a student in SchoolsBuddy and ManageBac. To view all linked contacts, check the student's record in **Reception > Users**.



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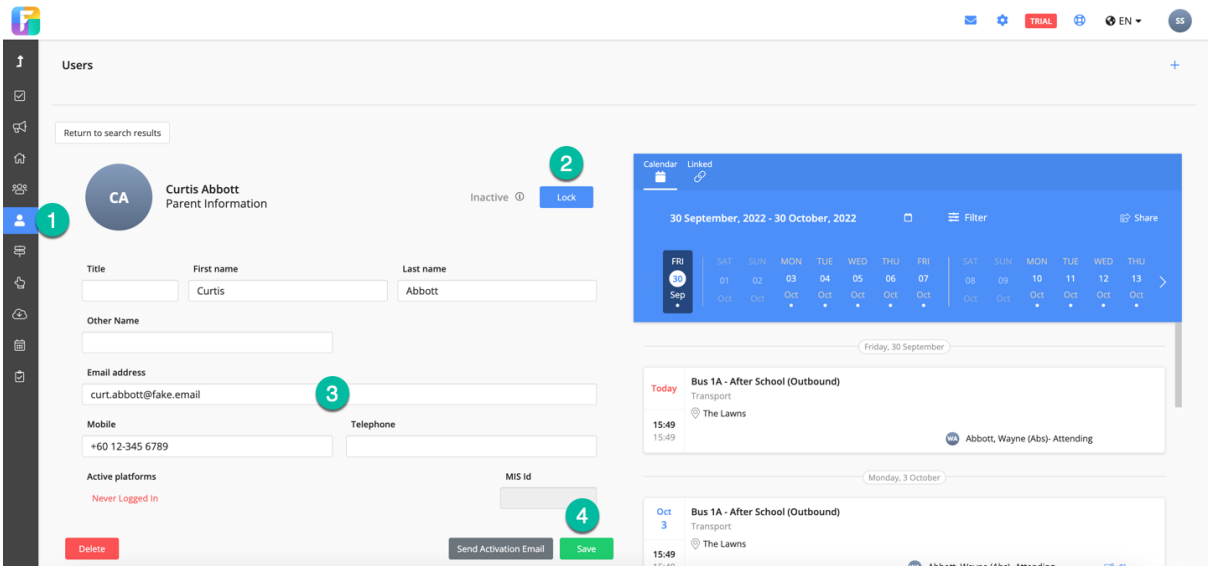
The **Pupil EB ID** seen next to your MIS ID (ManageBac/ Student ID, as configured) is SchoolsBuddy's unique "EveryBuddy" ID. The report does not show graduated or withdrawn students as standard, but the filters can be adjusted to see them.

On occasion, schools may want to activate parent's accounts as quickly as possible rather than wait for the overnight sync to update the account. Changes to email addresses must be updated in ManageBac as well. If the address is not changed in ManageBac it will revert in SchoolsBuddy after the next data sync.

To update user profiles Staff must have Super Admin privileges. Navigate to **Reception > Users** and search for the relevant user record. Unlock the record and edit the email address, and click **Save**.



Student IDs

Student IDs must be unique. If there is a duplicate ID, SchoolsBuddy will import one record at random, the duplicate will fail to import. The SchoolsBuddy Support team can help to troubleshoot missing student records. We recommend schools compare the number of active student, parent and staff records in each system when the Onboarding Manager provides them. Later on, the number of records can be checked by filtering the Users section to the type of user:

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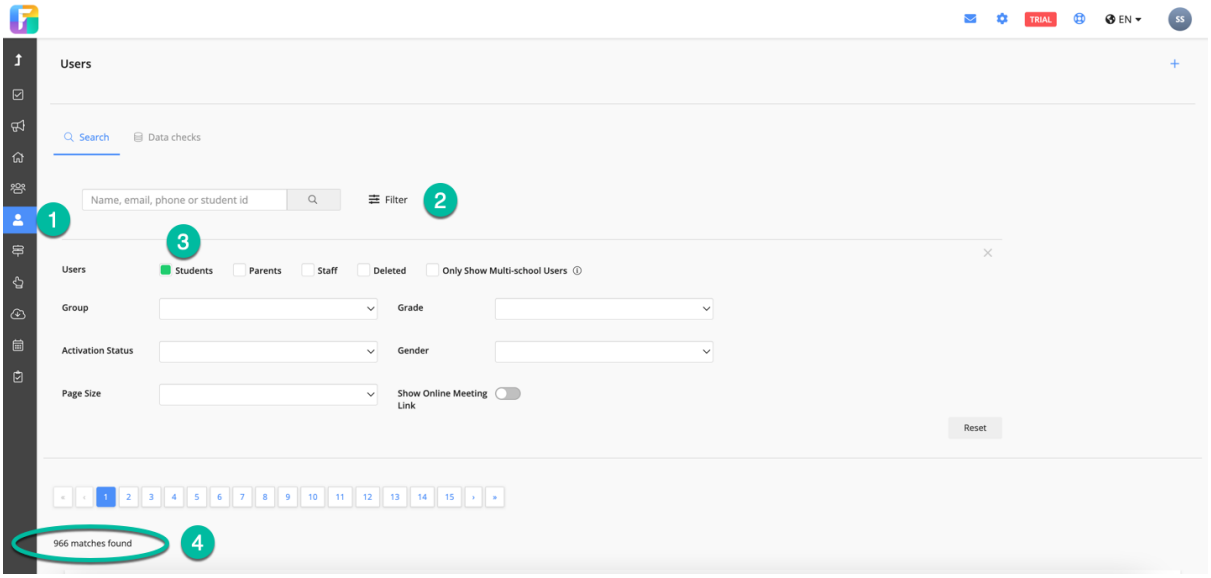

Please note: The total numbers include 5 extra Test Student records that SchoolsBuddy import on initial configuration for training purposes, and extra Support Staff records. The SchoolsBuddy Support team are automatically given Administrative roles to view your school so that they can provide assistance quickly when requested.

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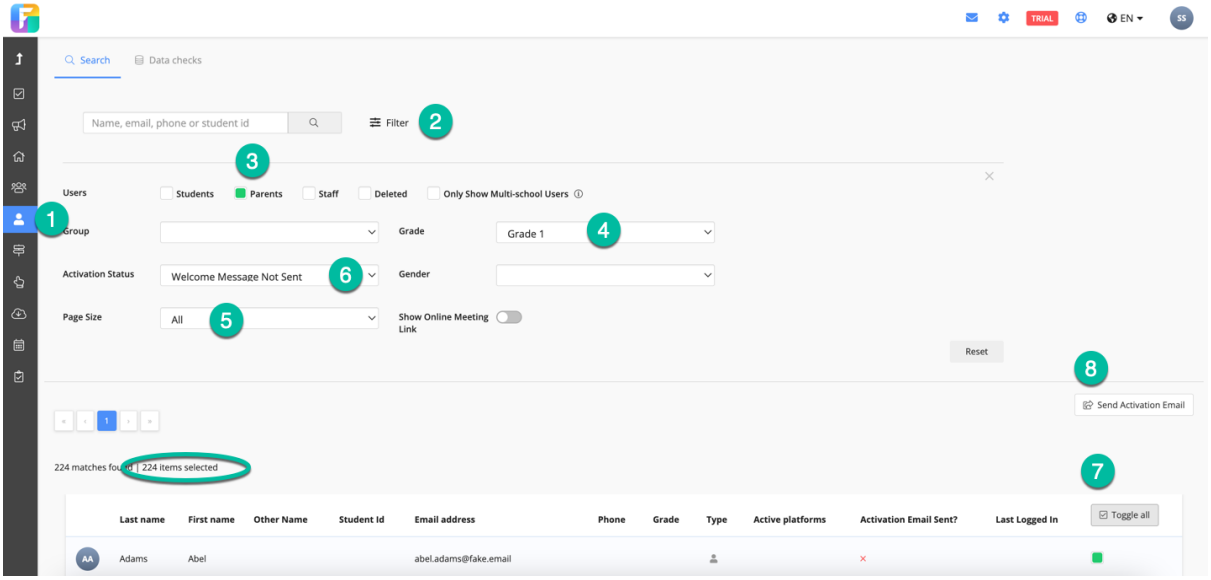
Bulk Activating Parent Accounts

From **Reception > Users**, you can **filter** to **Parents,** select a **grade/year** group and adjust the **Activation Status** and **Page Size** options. Use the **Toggle all** button to select a batch of users at a time. Please note that only the users listed on the page will be selected, so you must increase the Page size to show all, or **send the activation emails** in batches of 20 (default page size). Check the count of items selected to make sure you are sending the right amount.



Checking for Activated Parents

Expand the filters (3) and select the corresponding Activation status.

Users are divided into four categories:

1. **Dummy emails** (users that don't have a valid email address)
2. **Welcome email - not sent** (users that have not been activated)
3. **Never logged in (welcome email sent)** (activated, but have not created a password for their login)
4. **Active**

There are icons next to the user's name to show which platform(s) an active user accesses SchoolsBuddy with:

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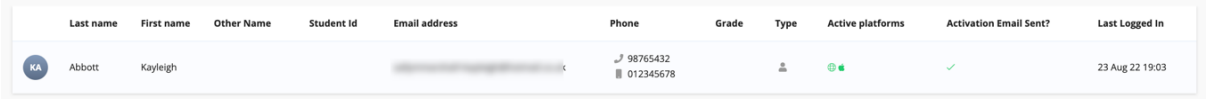
The user's **Last Logged in** date and **Active platforms** are shown in the **Reception > Users** roster:



Activated Parent Accounts

After activation parents receive a Welcome email inviting them to set a password for their new SchoolsBuddy account.

Parents that do not create logins for their accounts will still receive communications from SchoolsBuddy to their student's applicable groups (e.g. Whole School, Student's Homeroom/ Tutor group). This is to ensure that parents don't miss out on any important communications.

If your school is using ManageBac SSO, you do not need to send a welcome email. If you would like to send a welcome email, but without asking users to set up a password, contact the Support team to modify the welcome email template.

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Data Quality Analysis

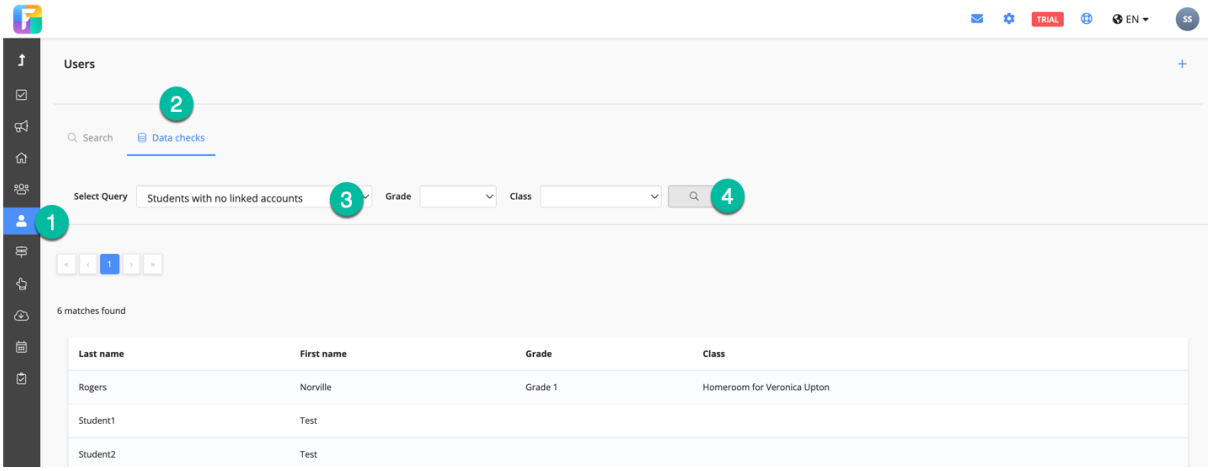
Our Onboarding Team will analyse the data in ManageBac and refer any queries to you before import. After import to SchoolsBuddy they will also verify that:

- Year levels and homerooms are present in SchoolsBuddy
- Students have Emails and IDs
- Parents are linked to student accounts
- The number of parents is roughly 1 or 2 times the number of students

The Onboarding Coordinator will contact the school to confirm the number of staff, student and parent records created in SchoolsBuddy matches the expected numbers.

SchoolsBuddy also provide a number of stored queries for schools to run data quality checks directly in the interface under: **Reception > Users > Data Checks**

For example, **Students with no linked accounts** displays all student accounts that don't have parent accounts linked. Your implementation lead will guide you through these pages at your initial onboarding meeting.



If you wish to download and check all data in an Excel spreadsheet SchoolsBuddy has a **Student Parent Export** report available under **Reception > Reports**. See **Verifying Email Addresses on SchoolsBuddy** on page 15 for further information.

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Data Conflicts & Resolution

Data Conflicts can arise from duplicate records in SchoolsBuddy. We use deduplication measures to prevent this at import by disabling import for the second record, whichever is seen last, where:

- ManageBac ID has already been imported
- Email address has already been imported

We employ a domain control for teacher's email addresses to ensure that their staff account can only be created with the school's email domain e.g. **internationalschool.sch.uk**

We can also block the staff email domain for parent user record creation on request, although this is not usually necessary when using ManageBac as staff are required to use separate emails for their ManageBac parent accounts.

These domain checks can be removed if necessary, for example if staff are allowed to use personal email accounts.

If two student or staff records were accidentally created in ManageBac with different ManageBac IDs, the incorrect record should be withdrawn in ManageBac. The incorrect record in SchoolsBuddy would be deleted with the overnight sync.

If two parent records were accidentally created in ManageBac with different ManageBac IDs, the incorrect record should be withdrawn in ManageBac and it will be deleted from SchoolsBuddy.

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Common Data Conflicts

Email is taken.

Sometimes schools may have a parent that is registered to another school as a staff member with the same email address (often external coaches or contracted staff members who work at multiple schools). If they are already a SchoolsBuddy staff user in one organisation their email address cannot be added automatically as a parent. In this case the SchoolsBuddy support team will create a "switcher" account for them so that they can access multiple schools with the same login email and password.

Invalid Email Address

SchoolsBuddy will not import emails with spaces, commas or multiple @ symbols.

Staff Parents

If a staff member is also a parent, they must use a different, personal email address as a parent contact in ManageBac to keep their parent and staff accounts separate. If they link their accounts in ManageBac accounts portal, they will only be able to use SSO with the primary account. SchoolsBuddy can link their parent & staff accounts together on request.

Family Email Address

In the case where schools have opted to use a shared family email address for both parents/guardians, only one contact record can be created in ManageBac and imported to SchoolsBuddy. Some schools opt to store these contacts with a default name "Family X".

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On-Going Synchronization Management

Use Cases

There are three actions that may happen during sync:

1. **User Update:** A user's demographic details (e.g. phone number) may have been updated in ManageBac. During sync, this will transfer to SchoolsBuddy.

2. **User Creation:** If a student is created on ManageBac they will be synced to SchoolsBuddy.

3. **User Archive**: If a student is marked as Withdrawn or Graduated in ManageBac, they are deleted on the next sync, and the parents will no longer have access to the student account (but they will have access to accounts for any children that remain students at the school). The student and their history can be manually restored in SchoolsBuddy from the User record in **Reception > Users** if they return to 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:

- Develop a best practice flow for how data is updated in their systems.
- Carefully review access and edit privileges for all staff users in SchoolsBuddy

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1. User Update

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

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

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

ManageBac

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

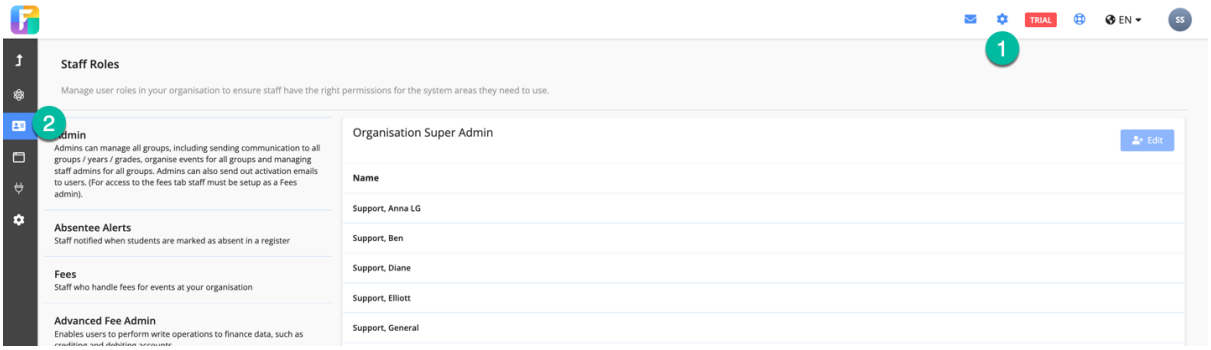
If you have sync enabled, we strongly recommend that you lock access and permissions down for teachers, parents, and students. (See **Settings > Permissions, Security & Privacy** on your ManageBac account, or refer to page 9 of this document.)

SchoolsBuddy

Changes to some data in SchoolsBuddy may be introduced by staff users with the **Super Admin** role. However, changes will be overwritten by the daily sync from ManageBac. We recommend only using this for necessary communication updates (e.g. updating a parent's email address in both systems so that they receive a communication going out from SchoolsBuddy today)

Organisation Super Admin Users can review staff permissions in **Settings > Staff Roles**.

N.B. SchoolsBuddy Support team are automatically given Super Admin permissions so that they can quickly access the school to assist with queries during training and support sessions.



Parents cannot make changes to their profile information in SchoolsBuddy. They are advised to contact the school so that changes can be made in ManageBac.

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2. User Creation

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

A new student is created on ManageBac. The student and their parents will sync to SchoolsBuddy if:

- ManageBac ID is valid and unique
- Email is valid and unique

If the parent already exists in SchoolsBuddy

There are three possibilities:

(1) If all details match, the existing parent account will automatically be linked to the new student account. This occurs most frequently with siblings. For example, Ann Epelbuam already has a SchoolsBuddy account because her daughter Chloe is enrolled at the school. When Chloe's brother Samuel is enrolled, Anne's SchoolsBuddy account will be linked to Samuel's account as well as Chloe's account.

(2) If the email address matches but the name is different, then the account will be automatically matched on email, and the name will be updated.

(3) If the email address is different but the name is the same, a new contact record will be created in SchoolsBuddy linked to Samuel's account only.

If a student or parent is not syncing to SchoolsBuddy, please follow the advice in Data Quality Analysis (page) to review if there is a larger issue or contact SchoolsBuddy Support for assistance.

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3. User Archive

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

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 will be updated to "deleted" in SchoolsBuddy upon sync. This is a soft delete - their records can be restored if they return to the school / were mistakenly deleted.

2. Student is marked as Withdrawn or Graduated in ManageBac.
The student status will be updated to "deleted" in SchoolsBuddy upon sync.

3. Parent is archived in ManageBac.
Parents are automatically deleted from SchoolsBuddy removing the link from the student.

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.

Once the student record has been archived the parent no longer has access to view the student's account and history. If Chloe graduates but her younger brother Samuel is still enrolled, her parents will still be able to view Samuel's account.

5. Staff Member is archived in ManageBac.
The staff member is updated to "deleted" in SchoolsBuddy overnight. If they are reactivated in ManageBac, they will automatically be reactivated in SchoolsBuddy.

Via SchoolsBuddy

Parents, Students and Staff can be manually deleted in SchoolsBuddy under **Reception > Users**. However, they will be automatically restored by the overnight sync if the record with corresponding ManageBac ID is an active record in ManageBac.

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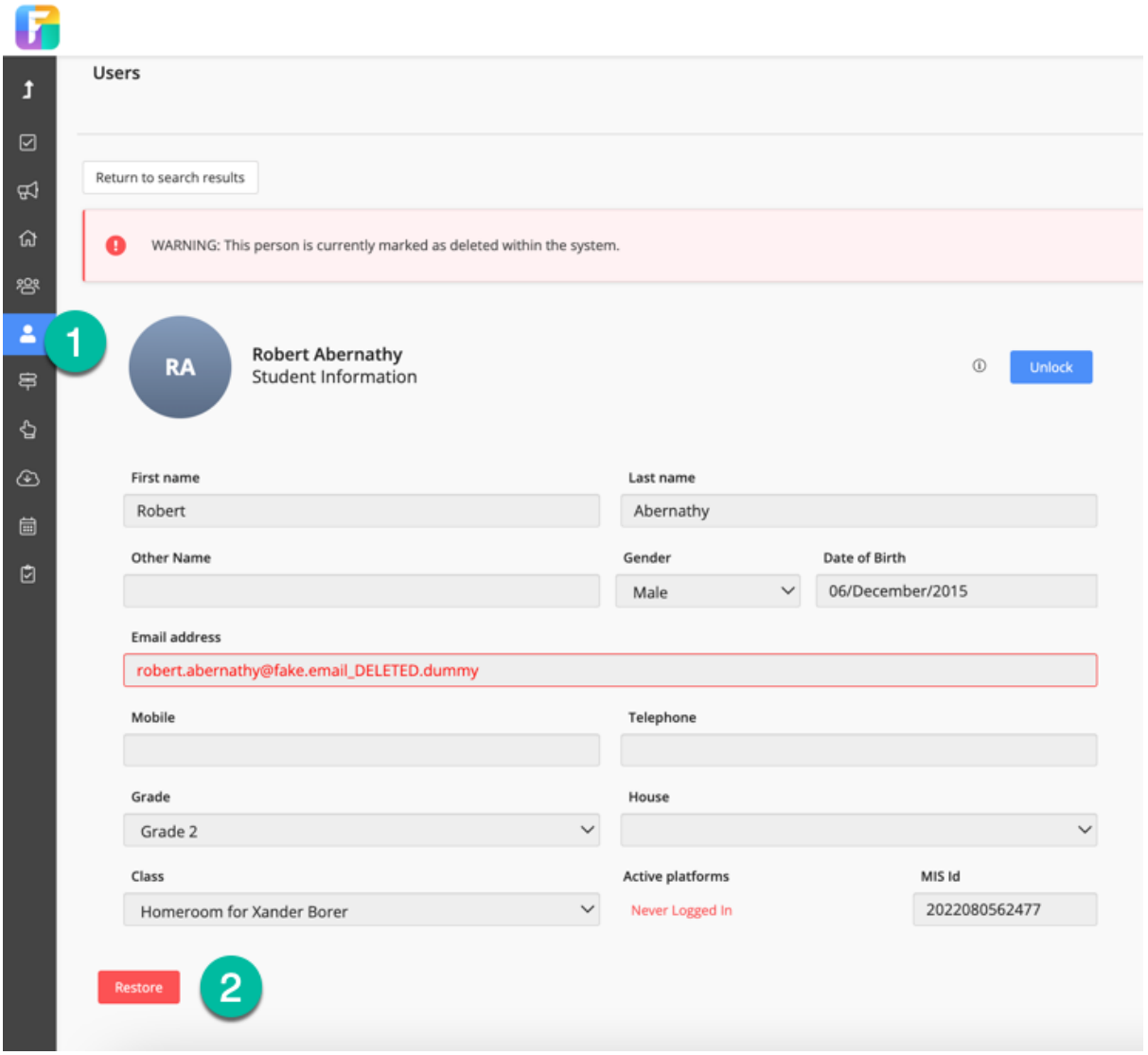
1. I mistakenly created a student in ManageBac that has synced over to SchoolsBuddy. Can I delete the student?

If you delete the student in ManageBac, nothing will happen to the student in SchoolsBuddy. The remaining profile will simply be excluded from sync.

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

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

The Student will be restored in SchoolsBuddy by the overnight sync from ManageBac. They can also be manually restored in SchoolsBuddy from their profile in **Reception> Users:**



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Synchronization Monitoring

SchoolsBuddy Support receive daily sync alerts so that they can re-submit a sync request if the automatic call fails overnight. We monitor whole sync updates rather than individual user updates, these are generally caused by a timeout on the connection (usually during maintenance periods) and are easily re-submitted. More complex errors may occur at the Onboarding stage, but these are rare and the Onboarding Team will report back to the school with any relevant details to resolve them.

For individual user sync errors we encourage the school to monitor this themselves and report any difficulties to SchoolsBuddy after 24-48 hours. For example, if 5 new starters have been added to ManageBac, the school can check SchoolsBuddy the next day and see how many activation emails are ready to send (10 should be shown if all students have 2 parent/guardians and the school has kept up to date with account activations). For further data quality analysis please see the guide on page 20 or the reports on page 15, or contact the SchoolsBuddy Support team.

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Frequently Asked Questions

Students

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

   Please review the following information in ManageBac:
   - Student Email
   - Student ID

   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 ManageBac. They've synced over to SchoolsBuddy but they are missing information.**

   Please double-check the fields you're using in ManageBac are correct. If they are, contact the SchoolsBuddy Support Team with the user's name and email address for further assistance.

Parents & Students

1. **I just enrolled a new student/parent in ManageBac. They've synced over to SchoolsBuddy but they didn't get a welcome email.**

   Welcome emails are not automatically sent. Please navigate to the **Reception > Users** roster page to send welcome emails.

2. **I've sent the welcome email in SchoolsBuddy but they didn't receive it.**

   Depending on the recipient's email provider, some parents/students may need to check whether the email was diverted to the spam filter, or blocked by their Network administrator (this may happen if they are using a school/work address and their school/company has a strict firewall policy). SchoolsBuddy have a sender score reputation of 99% but each mail provider has a different framework for how they categorise senders. If the parent has checked and the mail has not been diverted to spam, check the "never logged in - welcome email sent" list in **Admin** to see if there are any error messages. These are displayed in red next to the recipient name.

Miscellaneous

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

   Please contact the ManageBac team to help you create or remove a year level. Please do not do this independently. Disused grades will not be removed from SchoolsBuddy automatically. Please also contact SchoolsBuddy with the name of the Grade and we will remove it.

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

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Accounts are activated via a welcome email 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 verification email to their email address, to independently confirm the email 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. **Can SchoolsBuddy import attendance from ManageBac?**

   Yes. This is not set up by default so please contact help@schoolsbuddy.com to enable it. You will be able to view homeroom absence from ManageBac registers on the SchoolsBuddy register, with an AM or PM mark so teachers will know whether to expect somebody to attend the club.

5. **Can SchoolsBuddy hold Medical information?**

   Unfortunately ManageBac does not store Medical Information currently but if you are using **OpenApply** as well, we can assist you to import the data to SchoolsBuddy. SchoolsBuddy is reviewing the storage of Medical Information across all Faria products and hopes to be able to offer a solution for this in the future. In the meantime medical information can be entered directly into SchoolsBuddy from the **Reception > Users** section or imported.

Contact

The primary contact for ManageBac – SchoolsBuddy sync is:

SchoolsBuddy Support
help@schoolsbuddy.com

+44 1903 959565

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