



# Integration with iSAMS

Integration 2.0



# Contents



Introduction & Supported Fields

---



Getting Started

---



Version 2.0 Update

---



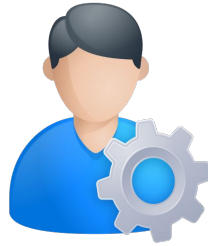
Integration Workflows

---



FAQs & Support

---



# Introduction & Supported Fields

# 1 Introduction

Our integration works in real time, without your IT Team's intervention and is managed by iSAMS / OpenApply Support Teams. The OpenApply to iSAMS integration requires a subscription to the API Services Module as part of your school's iSAMS package. This is a chargeable extra from iSAMS that must be budgeted for each year.

The initial integration is for Enrolled students only and their parents. Student and parent demographic information will be transferred from OpenApply to iSAMS once the student is marked as Enrolled in OpenApply. Going forward, information that is updated for the student in OpenApply will also sync across keeping information in iSAMS up to date as well.



## 2 Supported Fields

### Students

- First Name
- Middle Name
- Last Name
- Preferred Name
- Date of Birth
- Gender
- Year Grade Number
- Status
- Mobile Telephone
- Nationality (ISO Values)
- Language (ISO Values)
- Photo
- Enrolment Year
- Enrolment Date
- Withdrawn Date
- E-mail Address
- School Code (iSAMS)/Student ID (OpenApply)
- Address Line 1
- Address Line 2
- City
- State
- Post Code
- Country

### Parents

- Relationship
- Salutation/Title
- First Name
- Last Name
- Title/Profession
- E-mail Address
- Mobile Number
- Home Number
- Address Line 1
- Address Line 2
- City
- State
- Post Code
- Country

### Emergency Contact

- First Name
- Last Name
- Mobile Telephone





# Getting Started

# 1 Getting Started

Before the OpenApply > iSAMS integration can be enabled for your school, a data quality check and review of your grade setup on iSAMS and OpenApply are required. This ensures key data and settings between the accounts are already matching so that the systems can link smoothly. Please note that the full data check and sync enablement process can take 2-4 weeks depending on the quality of your data.

The following process must be followed.

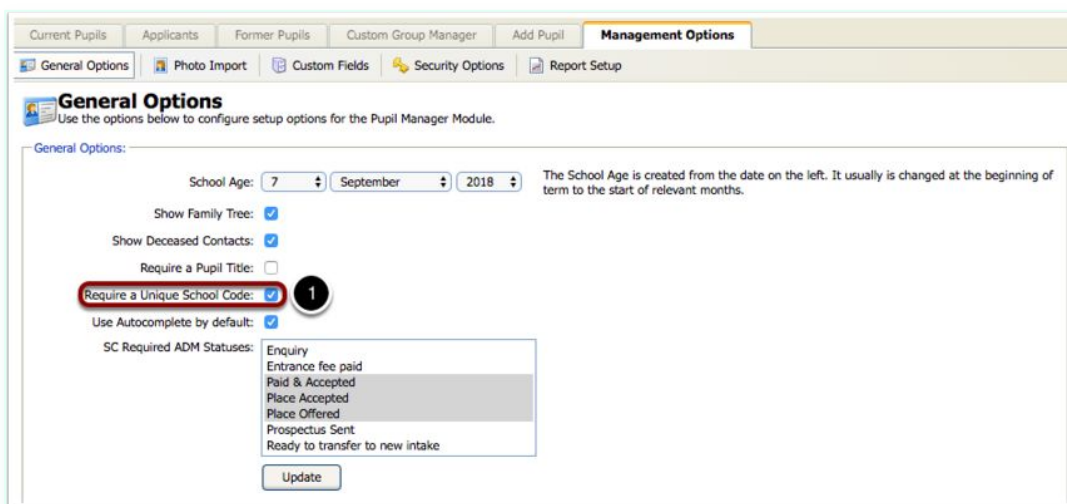
1. Export Student Records from iSAMS with key fields to an excel spreadsheet
2. Send excel spreadsheet and record of your iSAMS grade setup to OpenApply Support Team
3. OpenApply Support Team will compare the iSAMS and OpenApply datasets and grade information to ensure duplicate Students are not created when the integration is turned on.
4. OpenApply Support Team will feedback any concerns to the School.
5. Once all concerns have been resolved, OpenApply Support Team will enable the integration.



## 2 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.

1. Navigate to Student Manager > Configuration > General Options > Enable the option **Require a Unique School Code**
2. **Enable Automatic School Code** and fill in the other options



Current Pupils Applicants Former Pupils Custom Group Manager Add Pupil **Management Options**

General Options Photo Import Custom Fields Security Options Report Setup

### General Options

Use the options below to configure setup options for the Pupil Manager Module.

General Options:

School Age: 7 September 2018 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.

Show Family Tree: ☒

Show Deceased Contacts: ☒

Require a Pupil Title: ☐

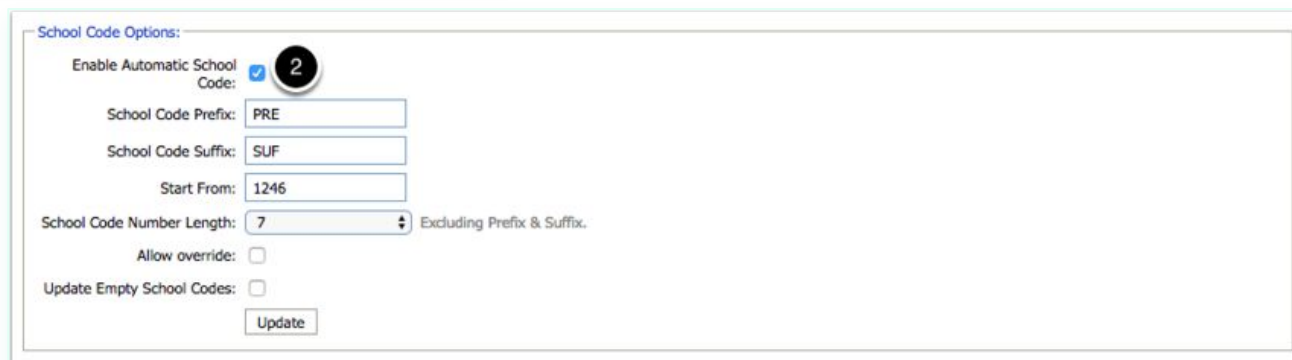
**Require a Unique School Code: ☒** 1

Use Autocomplete by default: ☒

SC Required ADM Statuses:

- Enquiry
- Entrance fee paid
- Paid & Accepted
- Place Accepted
- Place Offered
- Prospectus Sent
- Ready to transfer to new intake

Update



### School Code Options:

Enable Automatic School Code: ☒ 2

School Code Prefix: PRE

School Code Suffix: SUF

Start From: 1246

School Code Number Length: 7 Excluding Prefix & Suffix.

Allow override: ☐

Update Empty School Codes: ☐

Update

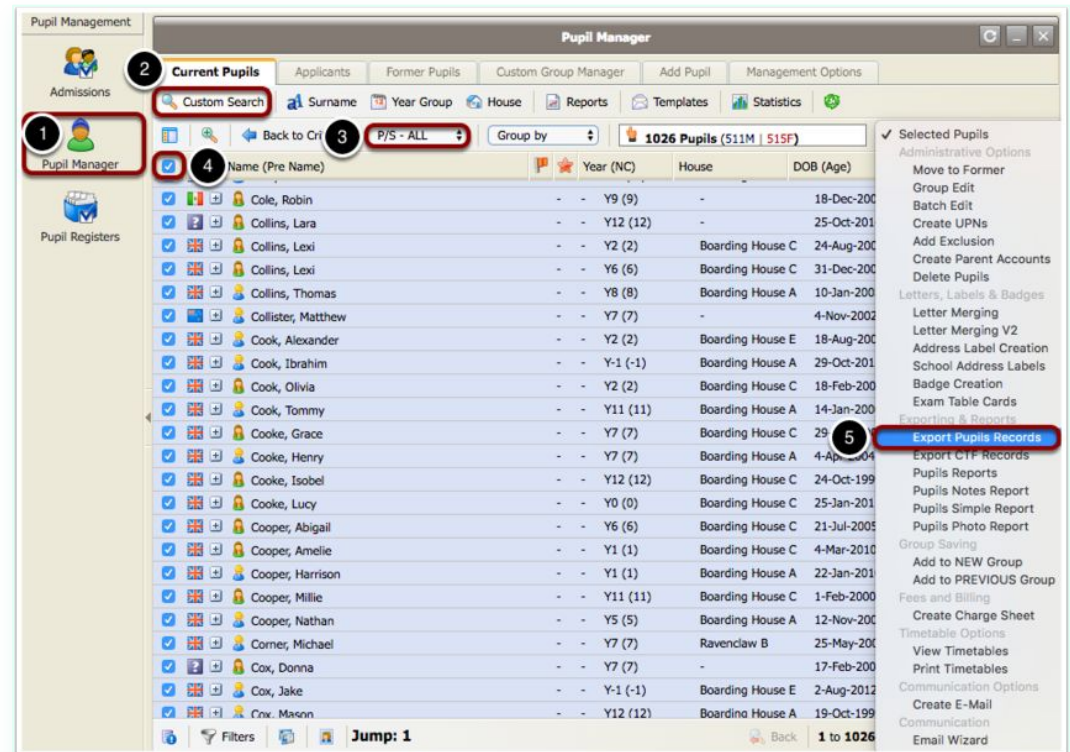




# 3 Exporting Student Information from iSAMS

To ensure a smooth data check, please ensure that all current pupils in iSAMS have Student Codes prior to exporting.

1. Navigate to Pupil Manager
2. Search for all Pupils
3. Change page size to All
4. Select all pupils
5. Go to the **Selected Pupils** dropdown list and select the option **Export Pupils Records**



# 3

## Exporting Student Information from iSAMS

1. Select **Create new export**
2. Click **Next**

The screenshot shows the 'Export Manager - Step 1 of 4' dialog box. At the top, there are buttons for 'Cancel & Close' and 'Back to Start'. Below the title bar, the main heading is 'Export Manager - Step 1 of 4' with a subtext: 'Would you like to use an saved, shared or new export? Use the tools below to manage your exports.' Underneath, there is a section titled 'Export Options (3)' containing three radio button options. The first option, 'Create new export using new fields and options.', is selected and highlighted with a red circle. It includes a green arrow icon and a description: '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.' The second option is 'Use an existing export that I created and saved.', which includes a green arrow icon and the text 'You have 0 previous Export Options to choose from.' The third option is 'Use a shared export that I or someone else created.', which includes a green arrow icon and the text 'There are 3 shared export options for you to choose from. Select the option above to show the ones available to you.' At the bottom of the options section, there are two buttons: 'Next >' (highlighted with a red rectangle) and 'Cancel'. In the bottom right corner of the dialog box, it says 'You selected 1026 Students'.

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)

- ☒ **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 0 previous Export Options to choose from.
- ☐ **Use a shared export that I or someone else created.**  
➡ There are 3 shared export options for you to choose from. Select the option above to show the ones available to you.

Next > Cancel

You selected **1026** Students



# 4 Field Selection

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.

## 1. Core Data Fields

1. Date of Birth
2. Forename (Firstname)
3. Preferred Name
4. Middle Names
5. Surname
6. Gender

## 2. Current Fields

1. School Code
2. Year Group (NC)

## 3. Contact Fields

1. Primary Contact Forename
2. Primary Contact Surname
3. Secondary Contact Forename
4. Secondary Contact Surname
5. Primary Contact Title
6. Secondary Contact Title
7. Primary Contact Email Address
8. Secondary Contact Email Address
9. Country
10. Relation Type
11. Address Type

## 4. Census Fields

1. Nationality
2. Language

**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** (Contains 12 fields which are the Core values) Select All Clear All

<input checked="" type="checkbox"/> Date of Birth	<input checked="" type="checkbox"/> Forename (Firstname)	<input 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 checked="" type="checkbox"/> Preferred Name	<input checked="" type="checkbox"/> Surname	<input type="checkbox"/> Title	<input type="checkbox"/> Type (Boarding Status)

**Contacts Fields** (Contains 33 fields relevant to Contacts)

**Custom Contact Fields** (Contains 14 custom fields relevant to Contacts)

**Admissions Fields** (Contains 52 fields relevant to Applicants)

**Current Fields** (Contains 70 fields relevant to Current Students) Select All Clear All Select a 'Current' Default

<input type="checkbox"/> Academic Category	<input type="checkbox"/> Academic House	<input type="checkbox"/> Account Code	<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 Name	<input type="checkbox"/> Doctor 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 Academic House	<input type="checkbox"/> Future Form	<input type="checkbox"/> Future House
<input type="checkbox"/> Future School Enrolment Date	<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"/> SEN Flag	<input type="checkbox"/> SEN Notes
<input type="checkbox"/> SEN Register	<input checked="" type="checkbox"/> School Code	<input 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 Home Email Address	<input type="checkbox"/> Student Pager Number
<input type="checkbox"/> StudentMobileNumber	<input type="checkbox"/> Surgery Address	<input type="checkbox"/> Surgery Name	<input type="checkbox"/> Tetanus
<input type="checkbox"/> Vaccine Information	<input type="checkbox"/> Withdrawn Date	<input checked="" type="checkbox"/> Year Group (NC)	<input type="checkbox"/> Year Group Code
<input type="checkbox"/> intasthmatic	<input type="checkbox"/> txtidental		

**Census Fields** (Contains 22 fields relevant to Census or Statistical Analysis)

**Custom Fields** (Contains 121 custom fields)

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

**Special Educational Needs Fields** (Contains 3 field(s))

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

< Back Next > Cancel

You selected 1026 Students



# 5

## Saving and Exporting an Integrations Data Set

1. Make sure **Export to Microsoft Excel** is selected
2. Optional: **Save the Export Report** to be used quickly again if concerns are raised by OpenApply Support Team.
3. Click **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: Surname    Then: Forename    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:**

☒ **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:**

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

Export Name: Integration Dataset

Export Desc: *Optional*

Export Group: Other

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 >**    Cancel

You selected **1026** Students





## 6 Providing iSAMS Grade Setup

1. Navigate to School Management > School Manager > Years (or Grades)
2. Take a screenshot of the Year Name (Year Code) column or copy this information to provide to OpenApply.

Year Name (Year Code)
 <b>Year -2</b> (Y-2   -2)
 <b>Year -1</b> (Y-1   -1)
 <b>Year 0</b> (Y0   0)
 <b>Year 1</b> (Y1   1)
 <b>Year 2</b> (Y2   2)
 <b>Year 3</b> (Y3   3)
 <b>Year 4</b> (Y4   4)
 <b>Year 5</b> (Y5   5)
 <b>Year 6</b> (Y6   6)
 <b>Year 7</b> (Y7   7)
 <b>Year 8</b> (Y8   8)
 <b>Year 9</b> (Y9   9)
 <b>Year 10</b> (Y10   10)
 <b>Year 11</b> (Y11   11)
 <b>Year 12</b> (Y12   12)





## Contact OpenApply Support

1. Download and Save the iSAMS Integrations Dataset.
2. Email [support@openapply.com](mailto:support@openapply.com) with the following template and include the Excel Spreadsheet and Grade Setup as attachments

***Email Subject: Data for iSAMS Integration***

*Dear OpenApply Support Team,*

*We would like to start the iSAMS Integrations Setup process. Attached is our iSAMS Integrations Dataset and Grade Setup information. Please can this be used and compared to our Students within OpenApply?*

*Kind regards,*





## Next Steps

1. OpenApply will review your dataset and grade setup and provide feedback on any data clean up or grade mapping that is required.
2. Once all concerns have been resolved, OpenApply will instruct you to obtain your API keys from iSAMS and enable the integration. An email will be sent to key contacts at your school confirming that it has been enabled.





# 2.0 Update

*May 2021*



## Integration 2.0 Update

With this new version, you will have greater control over what information syncs into iSAMS and at which point that sync initiates. Key features of the improved integration include:

- ✓ Map OpenApply fields to iSAMS core and custom fields
- ✓ Select which OpenApply statuses sync to iSAMS
- ✓ Sync to iSAMS student or applicant status
- ✓ Manually push student and parent data into iSAMS
- ✓ Customise additional settings like phone number format, mail options, and title requirements

We hope these new features allow you to customise your school's unique workflow from OpenApply to iSAMS. If you are currently using the iSAMS sync, and wish to make these updates, we recommend you first schedule a call with our support team by emailing [support@openapply.com](mailto:support@openapply.com).





# Integration Workflows

*Using the integration on a daily basis*

# Integration Workflows

## 1. **How long does it take for information entered into OpenApply to flow to iSAMS?**

Information will update to iSAMS within 10 seconds of being saved in OpenApply.

## 2. **When is a new student created from OpenApply to iSAMS?**

A new student is created in iSAMS when a student's status is changed to Enrolled in OpenApply.

## 3. **Can I sync students with future enrolment years/dates?**

Yes, if you Enroll a student in OpenApply with a future enrolment year or future enrolment date, then the student will appear in iSAMS under Pupil Manager and Teaching Manager. However, the student will not appear on the register for taking attendance.

## 4. **How will student addresses and emails sync between OpenApply and iSAMS?**

The student address will sync to iSAMS as a Self contact with the Student Home Address flag enabled. The student email will be included in the Self contact if one was created by the student address. The student email will also sync under Pupil Contacts and Networks.

## 5. **How will parent addresses sync between OpenApply and iSAMS?**

Parent home addresses in OpenApply will sync to iSAMS along with the other parent information. Please note that as work addresses must be stored in a separate contact in iSAMS, work addresses will not be synced from OpenApply to iSAMS. This will avoid creating any duplicate parents.

## 6. **How do I withdraw a student?**

Withdrawn students are not yet included in the integration. When you change a status to Withdrawn in OpenApply, the student's information will stop syncing to iSAMS. The correct process is therefore to withdraw the student first in OpenApply and then withdraw them in iSAMS. Eventually this will be automated as part of the integration. Note that the withdrawn date will only sync from OpenApply to iSAMS if the student is currently Enrolled and had previously withdrawn from the school.



# Integration Workflows

## 7. Should I assign Student IDs in iSAMS or OpenApply?

This is up to your preference. To assign IDs from OpenApply, you will need to ensure that you are creating the ID before you change the student's status to Enrolled. If you would like to use iSAMS to assign IDs, please be sure you have configured iSAMS School Code Settings to Enable Automatic School Code. For more information on how to do this, see page 7.

## 8. Is it ok to add new students directly to iSAMS?

No. If the OpenApply > iSAMS integration is enabled, then please add any new students through OpenApply. You will need to mark them as Enrolled before they will be created in iSAMS.

## 9. Is it ok to delete synced students from iSAMS?

No. If the OpenApply > iSAMS integration is enabled, then please do not delete any of the synced students from iSAMS. The students will not be able to be re-synced if you delete them. If there is a situation where you think you should delete a student, please contact us at [support@openapply.com](mailto:support@openapply.com) for advice.

## 10. How do I Transition Years in OpenApply/Rollover to the next year in iSAMS?

We recommend that you process Rollover in iSAMS first. Once your iSAMS rollover is completed, you can then Transition Years in OpenApply. Note: If you have the iSAMS > ManageBac > OpenApply integration enabled, please wait 24 hours after processing Rollover in iSAMS before Transitioning Years in OpenApply.

## 11. Can Enrolled students in OpenApply sync to Applicants in iSAMS?

No, Enrolled students in OpenApply will always sync to the Current Students list in iSAMS. If you would like students to appear in the Applicants list for a certain amount of time, it is recommended to move them there after they have been synced to iSAMS. Please note that while a student is listed as an Applicant in iSAMS, updates made in OpenApply will not sync to the student.



# Common Errors

## 1. What does the orange triangle on the Students Roster with “iSAMS sync error” mean?

The orange triangle on the Students Roster with the message “iSAMS sync error” indicates that there is data that didn’t sync from OpenApply to iSAMS. If the error says that a specific field is mandatory, then you have likely deleted the information in OpenApply, but the information is not able to be deleted in iSAMS. We recommend re-entering the data into OpenApply. If the error says the student does not exist, then the student was likely moved out of Current Pupils in iSAMS. We recommend switching the student back to a Current Pupil in iSAMS or updating OpenApply to the correct status.

## 2. If I delete information in OpenApply, will it be deleted in iSAMS?

For most fields, when information is deleted in OpenApply, then it will also be deleted in iSAMS. However, there are some fields in iSAMS that are required that may not be required in OpenApply. In these cases, when you delete the information in OpenApply, an orange triangle will appear next to the student on the Student Roster with the message “iSAMS sync error – {field} is mandatory”. In this case we recommend re-entering the data into OpenApply.

## 3. If I delete a student in OpenApply, will it be deleted in iSAMS?

No, iSAMS does not support syncing of deleted students. Students who were Enrolled and have left the school should be moved to Withdrawn or Graduated status in OpenApply and marked as a leaver or former pupil in iSAMS. If the student is truly a duplicate then you should merge the student in OpenApply and delete the duplicate in iSAMS.

## 4. A new student isn’t syncing. What went wrong?

Be sure to double check that the student’s status is Enrolled in OpenApply, and ensure that the student is not already in iSAMS in a status other than Current Pupil. Check the OpenApply Students Roster for an error message next to the student’s name.

## 5. A specific field isn’t syncing for a parent or student. What went wrong?

If the field is blank in OpenApply, it is possible that iSAMS does not allow this field to be blank. Check the OpenApply Students Roster for an error message next to the student’s name.





# FAQs & Support

*Answers at your fingertips!*

# General Questions

## **1. How long does it take to set up the integration?**

Initial setup takes 2-4 weeks. This includes time for a data check completed by OpenApply and data corrections completed by the school. Please note timelines vary for each school depending on size and the current state of the data.

## **2. Which statuses are included in the integration?**

At this time only Enrolled students in OpenApply will sync to iSAMS. All students from OpenApply will sync to the Current Students section of iSAMS, regardless of their Enrolment Year or Enrolment Date in OpenApply.

## **3. When initially enabling the integration, will the data from OpenApply overwrite the data in iSAMS?**

Schools can choose if they prefer for data in iSAMS to be overwritten from OpenApply upon the initial integration. Generally, schools that are new to iSAMS will want the data in iSAMS to be overwritten, while longer term users of iSAMS will not want data overwritten at the time of enabling.



# Using the OpenApply >iSAMS > ManageBac Integration

## 1. Can I enable the three integrations at once?

No, each integration will need to be enabled individually. Depending on if you are a new or existing customer for one or all three systems, there will be a different recommended order for enabling the integrations. It will also depend on your school's preference. Please contact us at [support@managebac.com](mailto:support@managebac.com) if you are unsure how to get started.

## 2. iSAMS handles parent contacts differently than OpenApply and ManageBac. How should our school organise parent information going forward?

When using the integration it is best to list parents in iSAMS as individual contacts instead of as combined Parents contacts. Any time a new student is Enrolled in OpenApply, the parents will be created in iSAMS as individual contacts, not as combined Parents contacts. If you have existing combined Parents contacts, then the information in OpenApply can sync to those existing contacts in iSAMS. However, new Parents type contacts cannot be created via the integration.

## 3. How should the student home address be determined in iSAMS to sync to ManageBac.

The student home address will sync to iSAMS as a Self contact with the Student Home Address Flag enabled. In order to sync to ManageBac, you will need to ensure that other contacts' addresses do not have the Student Home Address Flag enabled.





# First Class Support

	Online Support Centre	Telephone Support	Email Support
<b>Includes</b>	<p>Fully indexed documentation with keyword search allowing users to find tutorials quickly:</p> <ul style="list-style-type: none"> <li>✓ 10+ QuickStart guides</li> <li>✓ 20+ video tutorials, ranging from 3 min short tips to 30 min step-by-step guides</li> <li>✓ 150+ tutorials with annotated screenshots and written instructions</li> <li>✓ Free <a href="#">webinars</a> for professional development</li> </ul>	<p>Our friendly, knowledgeable support team provides fast phone support with no phone trees!</p> <p>Performance in 2019:</p> <ul style="list-style-type: none"> <li>✓ Calls received: 1,500+</li> <li>✓ Average duration: 06:00 minutes</li> </ul>	<p>Requests are handled by a globally distributed support team through a dedicated ticketing system called ZenDesk. All replies are sent within 24 hours of the original request.</p> <p>Performance in 2019:</p> <ul style="list-style-type: none"> <li>✓ Requests received: 8,000+</li> <li>✓ Replies within 1 hour: 20%</li> <li>✓ Replies within 1-4 hours: 44%</li> <li>✓ Resolved within 8 hours: 60%</li> </ul>
<b>When</b>	<b>24/7/365</b> across any device with printable PDF guides for every tutorial and guide.	<b>24 hours</b> a day during the work week, starting at Monday 8am HKT (GMT+8) and ending at Friday 6pm PST (GMT-7/-8 depending on daylight savings).	<b>24 hours</b> a day during the work week, starting at Monday 8am HKT (GMT+8) and ending at Friday 6am PST (GMT-7 / -8 depending on daylight savings). Dedicated weekend support for urgent queries.



Faria  
Education  
Group

## OpenApply Support:

- ✓ **Email :** [support@openapply.com](mailto:support@openapply.com), or submit a Support Request from within OpenApply directly
- ✓ **Help Center :** <https://help.openapply.com/help>

## Telephone



+1 866 297 7022



+852 8175 8152



+44 208 133 7489



+61 2 8006 2335

## Social Media



@openapply



@openapplyteam



@openapplyteam