

Syncing ManageBac & OpenApply

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

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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:

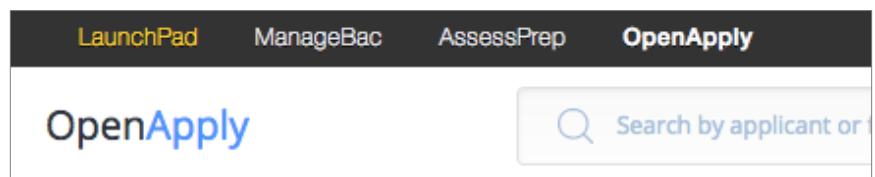
1. Students with status **Enrolled** for the present academic year, or earlier. (e.g. a student marked as Enrolled for 2020-2021 will not sync.)
2. Students with status **Withdrawn**^{*} or **Graduated**.

The integration allows for three actions:

1. **User Update:** A user's demographic details (e.g. phone number) 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. If a new student is created on ManageBac, the account will be synced to OpenApply as an Enrolled student.
 - 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 **User Archive:** If a student is marked as Withdrawn^{*} or Graduated in either system, they are automatically archived, together with the ManageBac parent accounts (if those parents do not have any other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).

^{*} Please note that **Withdrawn** is interpreted as an enrolled student who departed the school.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, including schools on trial for one or both services.

Which fields sync?



Student

First Name	Gender
Last Name	Languages
E-mail	Nationalities
Date of Birth	Preferred Name
Student ID	Profile Photo
Address Line 1	Enrolment Status (Enrolled, Withdrawn & Graduated)
Address Line 2	Graduation / Withdrawal Date
City	Year Level
State	National ID
Postal Code	



Parent

First Name	Postal Code
Last Name	Country
E-mail	Home Phone
Date of Birth	Mobile Phone
Salutation (Mr. Mrs. Ms.)	Work Phone
Address Line 1	Preferred Name
Address Line 2	Profile Photo
City	Relationship
State	

* Required fields for sync

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:

- Middle Name
- Other Name
- English Proficiency
- SSN
- Mobile Phone
- Home Phone

Chloe Epelbaum

Back to profile

Personal Details

First Name*

Chloe

Middle Name

Last Name*

Epelbaum

Preferred Name

Other Name

UI Language

English

Student ID ⓘ

10015

National ID

English Proficiency

Fluent

Date of Birth

April 1, 1999

Age: 18

Gender

Female

SSN ⓘ

1st Language

English

1st Nationality

American (United States of America)

Enrollment Start Date

August 15, 2017

2nd Language

French

2nd Nationality

French (France)

Add Language

Add Nationality

Contact Details

E-mail ⓘ

chloe@eduvo.com

Mobile Phone

+852 5123 4567

Home Phone

+852 5123 4567

Country

Hong Kong

Address

Fiat 10B, 68 Mount Davis Rd.

Address II

City

Pok Fu Lam

Family Details

Ann Epelbaum

Remove?

Thomas (Tom) Epelbaum

Remove?

Add Parent

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.

Ann Epelbaum

Personal Details

First Name*
Ann

Middle Name

Preferred Name

Last Name*
Epelbaum

Other Name

Salutation
Mrs.

Date of Birth
August 14, 1969

Age: 48

Gender
Female

1st Language
English

1st Nationality
American (United States of America)

2nd Language
Chinese

2nd Nationality
British

Add Language

Add Nationality

UI Language
English

Contact Details

E-mail*
ann@eduvo.com

Mobile Phone
+65 9301 5833

Home Phone
+852 2396 6840

Country
Hong Kong

Address
Flat 10B, 68 Mount Davis Road

Address II

City
Pok Fu Lam

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 > Access & Security**.

The screenshot displays the 'Access Permissions & Security' settings page. The left sidebar contains a menu with categories: GENERAL (School Settings, Grades & Programmes, School Directory, Access & Security, Academic Terms, Attendance, Behaviour & Discipline, Guides), ACADEMICS (Diploma, Middle Years, Primary Years, Non-IB), and ACCOUNT (Import, Integrations). The main content area is titled 'Access Permissions & Security' and includes the following sections:

- Login**: ☒ Remember Me for 30 Days
- Teachers & Advisors**:
 - ☒ Edit Unit Authors ☐ Create Classes
 - Student profiles access**: ☐ Read & Edit ☒ Read-only ☐ None
- Students**:
 - ☒ Browse Interview Notes
 - ☒ Lock Approved CAS/SA Activities
 - ☒ Lock Student Profiles
 - Locks students from making changes to personal information. Enable read-only access to teachers and lock student profiles to restrict teachers from making edits to CAS/SA activities of students that they are not advising.
- Parents**:
 - ☒ Lock Parent Profiles
 - Locks parents from making changes to personal information.
 - ☒ Lock Parents Association
 - Locking the parents association will prevent parents from responding to message threads or posting new messages.
- Passwords**:
 - ☐ Allow Weak Student Passwords ☐ Allow Weak Parent Passwords
 - Weak Password Requirements: Minimum 6 characters. We recommend schools use default password strength; however, if you choose to enable weak password requirements, security risks will be higher.

At the bottom right, there are buttons for 'Save Changes' and 'or Cancel'.

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



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:

A screenshot of the 'Edit Field' interface in OpenApply. The form is titled 'Edit Field' and has a blue header bar. In the top right corner, there is a tab labeled 'Email Address' with a close icon. The form contains several sections: 'Short Name' with a red asterisk and a text input field containing 'Email'; a description 'A unique identifier for this field'; 'Field Label' with a red asterisk and a text input field containing 'Email'; a description 'The publicly visible label for this field'; 'Field Label Translation' with an empty text input field; 'Instructions' with a large text area; 'Required' with a red asterisk and three radio buttons: 'Yes' (unselected), 'No' (selected), and 'Office use' (unselected); a red-bordered box containing the text 'This is a global field. You will only be able to edit the field label, the instructions and whether or not the field is required.'; 'Default Value' with an empty text input field and the description 'The default value of this field'; and 'Conditional Fields' with a blue question mark icon and an 'Add rule' button. At the bottom right, there are 'Cancel' and 'Save Changes' buttons.

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 not 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. Parent accounts in OpenApply must be **activated**. (Parents of enrolled students.) This ensures their e-mail addresses are unique.
- ☐ 5. Both ManageBac and OpenApply accounts must be on the same (current) **academic year**.
- ☐ 6. 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 synchronization 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**.

The screenshot shows the 'Grades and Programmes' settings page in the ManageBac interface. The sidebar on the left contains navigation links for GENERAL, ACADEMICS, and ACCOUNT. The main content area is titled 'Grades and Programmes' and features a table for configuring year levels.

International Baccalaureate			National Curriculum			
	<input checked="" type="checkbox"/> IB Primary Years	<input checked="" type="checkbox"/> IB Middle Years	<input checked="" type="checkbox"/> IB Diploma	<input type="checkbox"/> Primary School	<input checked="" type="checkbox"/> Middle School	<input checked="" type="checkbox"/> High School
Pre-K2	<input type="checkbox"/> Pre-Nursery			<input type="checkbox"/> Pre-K2		
Pre-K3	<input checked="" type="checkbox"/> Pre-K3			<input type="checkbox"/> Pre-K3		
Pre-K4	<input checked="" type="checkbox"/> Pre-K4			<input type="checkbox"/> Pre-K4		
Kindergarten	<input checked="" type="checkbox"/> Kindergarten			<input type="checkbox"/> Kindergarten		
Grade 1	<input checked="" type="checkbox"/> Grade 1			<input type="checkbox"/> Grade 1		
Grade 2	<input checked="" type="checkbox"/> Grade 2			<input type="checkbox"/> Grade 2		
Grade 3	<input checked="" type="checkbox"/> Grade 3			<input type="checkbox"/> Grade 3		
Grade 4	<input checked="" type="checkbox"/> Grade 4			<input type="checkbox"/> Grade 4		
Grade 5	<input checked="" type="checkbox"/> Grade 5			<input type="checkbox"/> Grade 5		
Grade 6	<input type="checkbox"/> Grade 6	<input checked="" type="checkbox"/> Grade 6		<input type="checkbox"/> Grade 6	<input checked="" type="checkbox"/> Grade 6	
Grade 7		<input checked="" type="checkbox"/> Grade 7			<input checked="" type="checkbox"/> Grade 7	
Grade 8		<input checked="" type="checkbox"/> Grade 8			<input checked="" type="checkbox"/> Grade 8	

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.

OpenApply

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

Programme

Campuses

Status & Notification

Tours

Open Days

Checklist

Re-Enrolment

Task Types

Programme

Years format: ☒ US system ☐ UK system

Warning: Please do not reconfigure your year levels if you have OpenApply-ManageBac sync enabled. Please contact support@openapply.com for further assistance.

☒ Primary

Early learning

Pre-k3

Pre-k4

Kindergarten

Grade 1

Grade 2

Grade 3

Grade 4

Grade 5

Capacity

25

↓

Capacity

12

↓

Capacity

10

↓

Capacity

24

↓

Capacity

24

↓

Capacity

24

↓

Capacity

24

↓

Capacity

24

↓

Capacity

24

↓

+

☒ Middle

✖

Grade 6

Grade 7

Grade 8

Capacity

24

↓

Capacity

24

↓

Capacity

24

↓

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 OpenApply

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 confirm:
 - a. The field label
 - b. If the field is required
 - c. Any 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.

Name	Type
Email	Email Address
Email (2)	Email Address
Email (3)	Email Address
Email (4)	Email Address

[+ Add Field](#) [Edit Field](#)

[Parent/Guardian](#) [View Grouped Fields](#) [+ Add Group](#)

☐ Field added to the form ☐ Field available to be added to 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.

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.

We ask that student IDs match precisely across both systems prior to enabling sync.

Activating Parent Accounts

As ManageBac requires each parent to hold a unique e-mail address, only **activated** parents from OpenApply will sync to ManageBac.

Checking for Activated Parents

Navigate to **Families** to see a full list of your parents. (We recommend also using the **Filter** to look at only parents with enrolled children.)

Parent One Name	Parent Two Name	Children	Program	Status
Christopher Adamczyk	N/A	Hieronim	Middle	Enrolled
Minette Benoit	Georges Benoit	Colette	Primary	Enrolled
Reina Bosch	Jasper Bosch	Sebastian	Secondary	Enrolled
Wan Chong	Khayla Chong	Hon Weng	Middle	Enrolled
Ariana Crespo	Talan Crespo	Ulysses	Secondary	Enrolled
Madeline Durand	N/A	Andre	Secondary	Enrolled
Ann Epelbaum	Thomas Epelbaum	Henry	Primary	Enrolled
Isabel Fredriksson	N/A	Cesar	Middle	Enrolled
Amos Hart	N/A	Roxanne	Primary	Enrolled

All parents with a **key symbol** next to their name have activated accounts. In the screenshot, only Amos Hart does not have an activated account.

This key symbol also appears next to the parent names on the student profile.

PARENTS & GUARDIANS

- Minette Benoit Mother
- Georges Benoit Father

An activated account effectively means that the record is login-able, i.e. parents can login to the system. You can **re-send a welcome e-mail** to any activated account.

But what happens if you need to activate accounts without giving parents access? (Please see the next section.)

Bulk Activating Parent Accounts

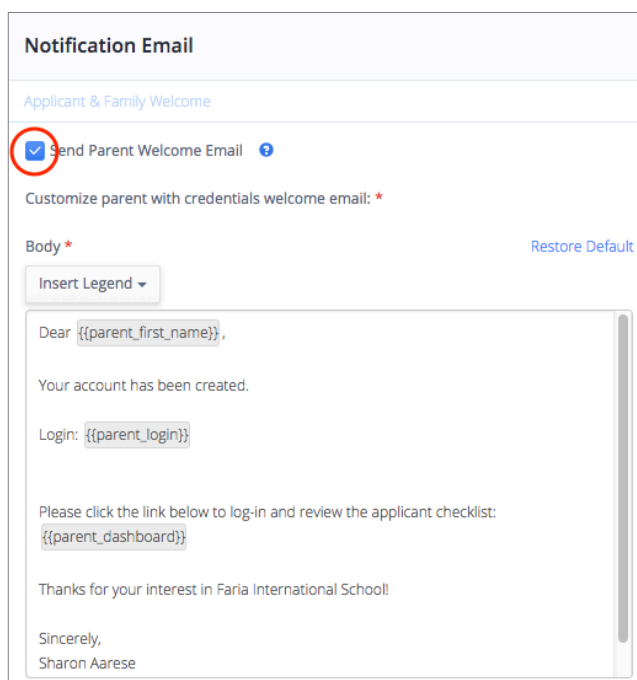
Activating a parent account typically means that the parent will receive a welcome e-mail inviting them to login to OpenApply for the first time.

For most schools enabling ManageBac – OpenApply sync, they do not need parents to login to OpenApply. In this case, you can de-activate the welcome e-mail before activating accounts.

1. Navigate to **Settings > Admissions > Status & Notification.**

Scroll down to **Applicant & Family Welcome**, then disable the **Parent Welcome Email**.

When you have finished activating the parent accounts, remember to turn this back on, so that new applicants and families receive the notification.



Notification Email

Applicant & Family Welcome

☒ Send Parent Welcome Email ⓘ

Customize parent with credentials welcome email: *

Body * [Restore Default](#)

Insert Legend ▾

Dear {{parent_first_name}},

Your account has been created.

Login: {{parent_login}}

Please click the link below to log-in and review the applicant checklist:
{{parent_dashboard}}

Thanks for your interest in Faria International School!

Sincerely,
Sharon Aarese

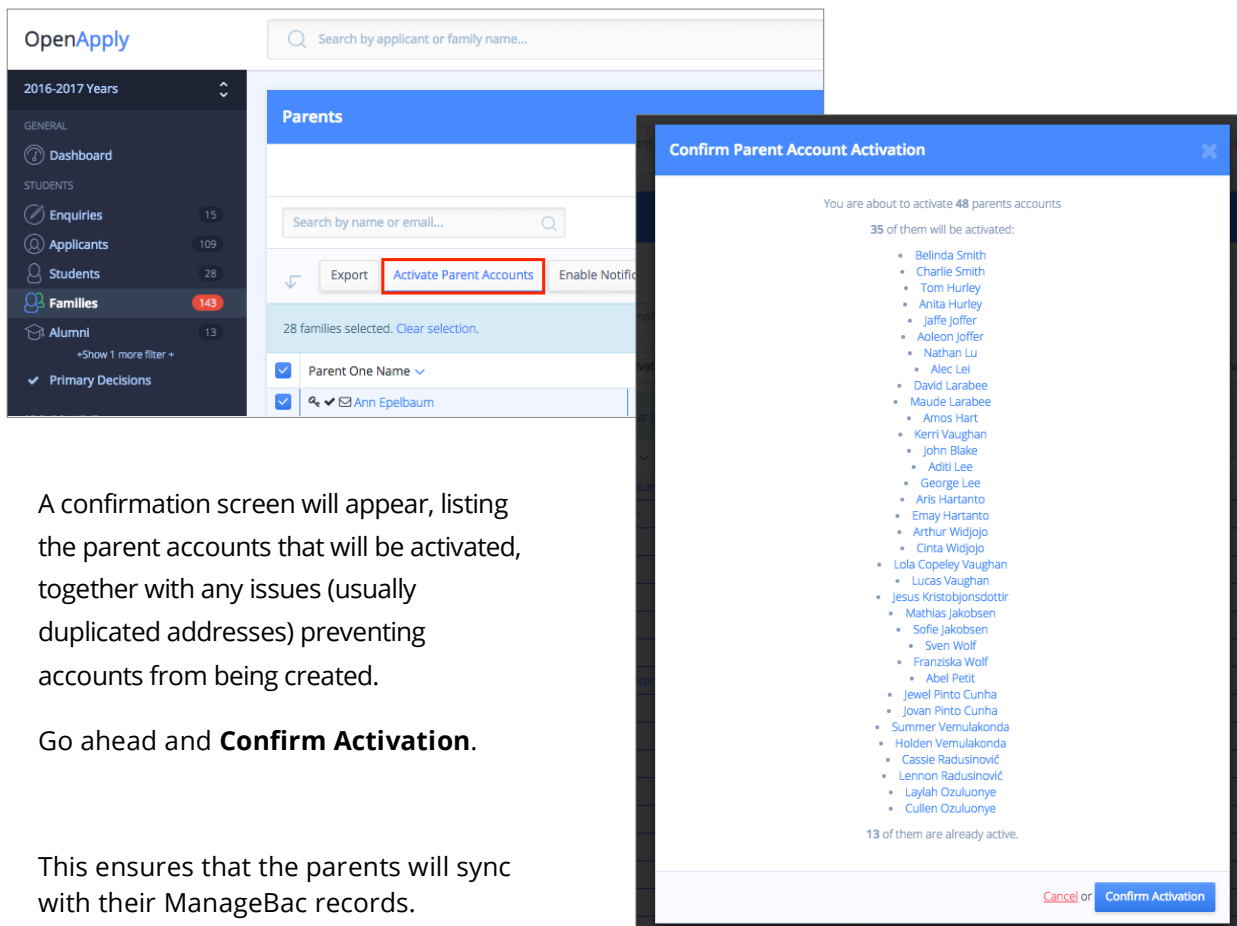
2. Navigate back to the **Families** tab.

Filter for **Enrolled** students, then select **all families** by clicking the box in the top left.

The screenshot shows the OpenApply interface with the 'Families' tab selected. The left sidebar shows the 'Families' tab with a count of 143. The main content area displays a table of families for the 2016-2017 Academic Years. The table has columns for Parent One Name, Parent Two Name, Children, Program, and Status. A red circle highlights the top-left checkbox in the 'Parent One Name' column, which is used to select all families. The 'Status' column shows that all families are 'Enrolled'.

Parent One Name	Parent Two Name	Children	Program	Status
<input checked="" type="checkbox"/> Ann Epelbaum	Thomas Epelbaum	Henry	Primary	Enrolled
<input checked="" type="checkbox"/> Noel Fredriksson	N/A	Cesar	Middle	Enrolled
<input checked="" type="checkbox"/> Amos Hart	N/A	Roxanne	Primary	Enrolled
<input checked="" type="checkbox"/> Aris Hartanto	Eray Hartanto	Rasul	Primary	Enrolled
<input checked="" type="checkbox"/> Tom Hurley	Anita Hurley	Mark	Primary	Enrolled
<input checked="" type="checkbox"/> Mathias Jakobsen	Sofie Jakobsen	Gerth	Middle	Enrolled
<input checked="" type="checkbox"/> Jaffe Joffer	Aoleon Joffer	Akeem	Primary	Enrolled
<input checked="" type="checkbox"/> Jesus Kristbjonsdottir	N/A	Konny	Middle	Enrolled
<input checked="" type="checkbox"/> David Larabee	Maude Larabee	Lihus	Primary	Enrolled
<input checked="" type="checkbox"/> Aditi Lee	George Lee	Andrew	Primary	Enrolled
<input checked="" type="checkbox"/> Alec Lei	N/A	Connie	Primary	Enrolled
<input checked="" type="checkbox"/> Nathan Lu	N/A	Betty	Primary	Enrolled
<input checked="" type="checkbox"/> Laylah Ozuluonye	Cullen Ozuluonye	Ofodile	Secondary	Enrolled
<input checked="" type="checkbox"/> Abel Petit	N/A	Alexandre	Secondary	Enrolled

3. Click **Activate Parent Accounts**.



The screenshot shows the OpenApply interface. On the left is a sidebar with navigation links: Dashboard, Enquiries (15), Applicants (109), Students (28), Families (143), Alumni (13), and Primary Decisions. The main area is titled 'Parents' and contains a search bar, an 'Export' button, and a red-bordered button labeled 'Activate Parent Accounts'. Below this, it says '28 families selected. Clear selection.' and shows a list of parents with checkboxes. A modal window titled 'Confirm Parent Account Activation' is overlaid on the right. It states 'You are about to activate 48 parents accounts' and '35 of them will be activated:'. It lists 35 names, including Belinda Smith, Charlie Smith, Tom Hurley, Anita Hurley, Jaffe Joffer, Aoleon Joffer, Nathan Lu, Alec Lei, David Larabee, Maude Larabee, Amos Hart, Kerri Vaughan, John Blake, Aditi Lee, George Lee, Aris Hartanto, Emay Hartanto, Arthur Widjojo, Cinta Widjojo, Lola Copeley Vaughan, Lucas Vaughan, Jesus Kristobjonsdottir, Mathias Jakobsen, Sofie Jakobsen, Sven Wolf, Franziska Wolf, Abel Petit, Jewel Pinto Cunha, Jovan Pinto Cunha, Summer Vemulakonda, Holden Vemulakonda, Cassie Radusinovic, Lennon Radusinovic, Laylah Ozuluonye, and Cullen Ozuluonye. It also notes '13 of them are already active.' At the bottom of the modal are 'Cancel' and 'Confirm Activation' buttons.

A confirmation screen will appear, listing the parent accounts that will be activated, together with any issues (usually duplicated addresses) preventing accounts from being created.

Go ahead and **Confirm Activation**.

This ensures that the parents will sync with their ManageBac records.

A key symbol will appear next to the names of activated parents.

Remember to turn your parent welcome e-mails back on! (Reverse the steps in Step 1.)

Current Academic Year

If you are currently at the start or end of an academic year, please ensure that **both** 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 (DP & MYP):
https://help.managebac.com/support?lesson=759060&manual_id=1970
- Transitioning for ManageBac (PYP):
https://help.managebac.com/support?lesson=74119&manual_id=4131
- Transitioning to a new academic year on OpenApply:
https://help.openapply.com/help?lesson_id=554796&manual_id=9754

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 the 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 li			
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 E-mail is different between the two accounts, we will automatically merge the accounts and take the ManageBac e-mail 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 li			
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 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 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 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.
3. **User Archive:** If a student is marked as Withdrawn or Graduated in either system, they are automatically archived, 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.



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.)



Changes to data in OpenApply may be introduced by:

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

Permissions	
Navigation	Settings
<ul style="list-style-type: none"><input checked="" type="checkbox"/> Dashboard<input checked="" type="checkbox"/> Applicant Profile<ul style="list-style-type: none"><input checked="" type="checkbox"/> Ability to access Re-enrolment or Payments roster<input checked="" type="checkbox"/> Ability to add notes, files & interviews<input checked="" type="checkbox"/> Ability to create, edit and delete<input checked="" type="checkbox"/> Ability to access Payment & Invoices<input checked="" type="checkbox"/> Messaging<input checked="" type="checkbox"/> Analytics	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Import/Export<input checked="" type="checkbox"/> Integration<input checked="" type="checkbox"/> Forms<input checked="" type="checkbox"/> Pages<input checked="" type="checkbox"/> Users<input checked="" type="checkbox"/> General<input checked="" type="checkbox"/> Admissions<input checked="" type="checkbox"/> Re-Enrolment<input checked="" type="checkbox"/> Billing<input checked="" type="checkbox"/> Audit Log<input checked="" type="checkbox"/> Payment

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**.

The screenshot shows the 'Edit Profile Information' form. At the top is a blue header with a back arrow and the title 'Edit Profile Information'. The form contains the following fields and options:

- First Name ***: Text input with 'Thomas'.
- Last Name ***: Text input with 'Epelbaum'.
- Gender ***: Radio buttons for 'Male' (selected) and 'Female'.
- Email ***: Text input with 'thomas@eduvo.com'.
- Change password**: Text input.
- Confirm Password**: Text input.
- Photo**: A button with a person icon and the text 'Upload New Photo?'.
- Home Street Address 1**: Text input with '12 Third Street' and a green checkmark.
- Home Street Address 2**: Text input.
- City**: Text input with 'Hong Kong'.
- State**: Text input with a green checkmark.
- Postal Code**: Text input with a green checkmark.
- Country**: Dropdown menu with 'Hong Kong' selected and a green checkmark.

At the bottom right, there are two buttons: 'Cancel' (in red) and 'Update Family Information' (in blue).

(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) If all details match, 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) If all details do NOT match, 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 on the three dots and Export Students & Parents. 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 28 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 will be updated in OpenApply upon sync.

2. Student is marked as Withdrawn in ManageBac.

The student status 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.

4. 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.

Synchronization Digest

When synchronization 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.

Please refer to your digest e-mail to confirm the reason.

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 activated.

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 verification 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:



Angelica Nierras

angelica@managebac.com
+1 415 992 6389

Feel free to schedule calls or trainings with Angelica directly via this link:

<http://calendly.com/angelicanieras>

Please specify “MB-OA sync” in the description.

For immediate assistance or inquiries about ManageBac – OpenApply synchronization, our **Support Team** is available 24 hours a day, Monday to Friday.



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