

Preparing your school's account for the New Academic Year

Best-Practice Steps to Transitioning & Data Management

Pre-Transition Recommendations

[Help Guide](#)

1

Export local copies to take a picture of your account as is

Generate Reports & Export Term Grades / Download PDF Planners / Export Attendance Records

2

Review Curriculum Requirements

Configure Task Category & Grade Scale Defaults / Unit Template Modifications / Project Templates

3

Manage your School Information Ecosystem

Transition OpenApply, iSAMS, SchoolsBuddy or other integrations

New Academic Year Transition

[Help Guide](#)

1

Review Programme Options

Add Academic Terms

2

Review Access Requirements

Lock ManageBac / Archive Graduated & Transition Existing Students / Add Newly Enrolled Students

3

Configure Class Requirements

Review Subjects, Levels & Standards / Transition or Archive existing Classes / Create New Classes

4

Add your Schools Calendar

Configure Holidays / Setup Periods / Import Timetables / Add Year Group Deadlines

5

Update Class & Homeroom Members

Add Students & Teachers to Classes / Assign Students to Advisors / Generate Timetables

6

Opening to your Community!

Unlock ManageBac / Send Welcome E-mails

Post-Transition Recommendations

[Help Guide](#)

1

Review Permissions & Access Rights

Grant Staff Permissions / Lock Profiles / Lock Classes / Custom Portfolio rights

2

Final New Academic Year Checks

Review Password Restrictions / Add Announcements / Set Theme / Add link on website / Import Streams

3

Opening to your Community!

Upload Handbooks / Run Introduction Sessions/ Install Mobile Access