xporter

Xporter Manage Platform User Guide

A User Guide

Contents

Checking School Lists

Manage provides stats on all XoD schools that are associated with your app. You'll have visibility of the schools that have:

- Authorised data sharing with you
- Been invited to share data with you
- Previously shared data but have since revoked your access

See a breakdown on how to utilise each list **View.**

Active Schools

This View displays a list of all schools that have **authorised data sharing for your platform.**

The columns and filters on this page will help you to check what stage of the onboarding process the school has reached and what data sharing options they have chosen.

Note: The Active Schools View will also display schools that do not have a working Xporter setup. Please see below for how to identify if this is the case.
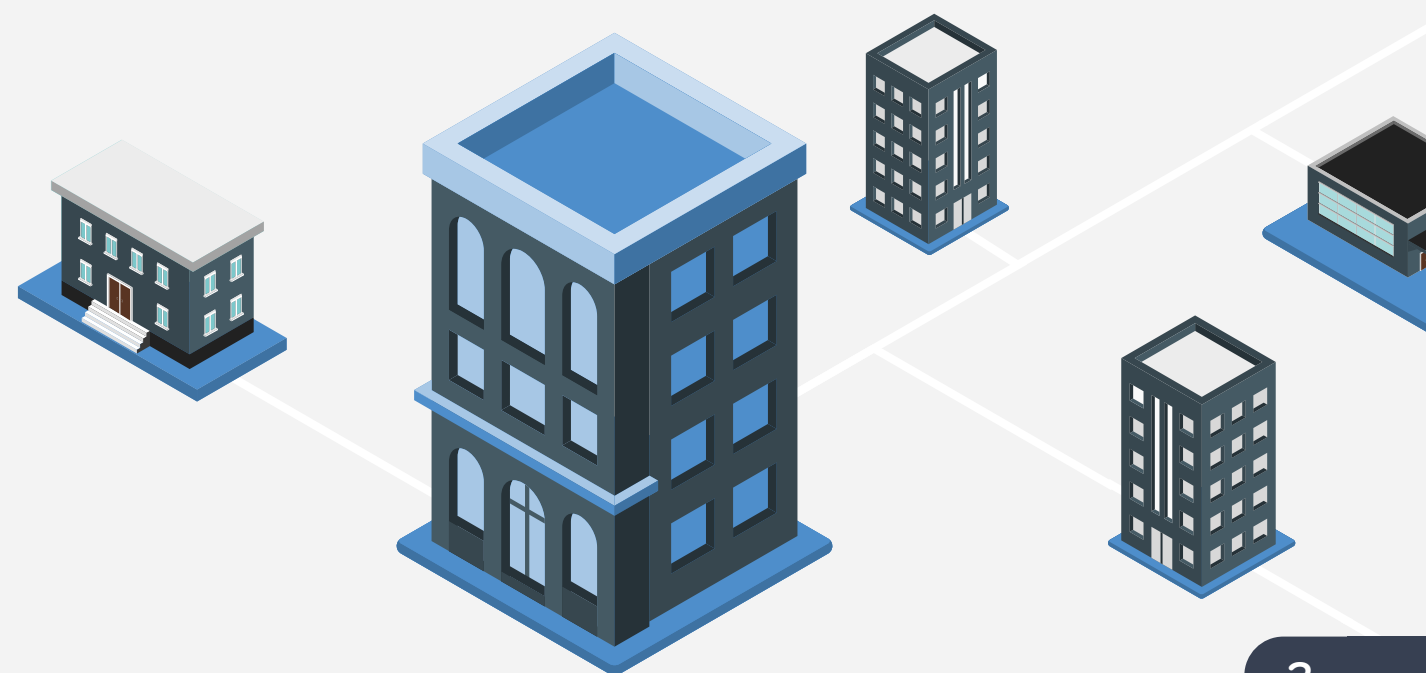
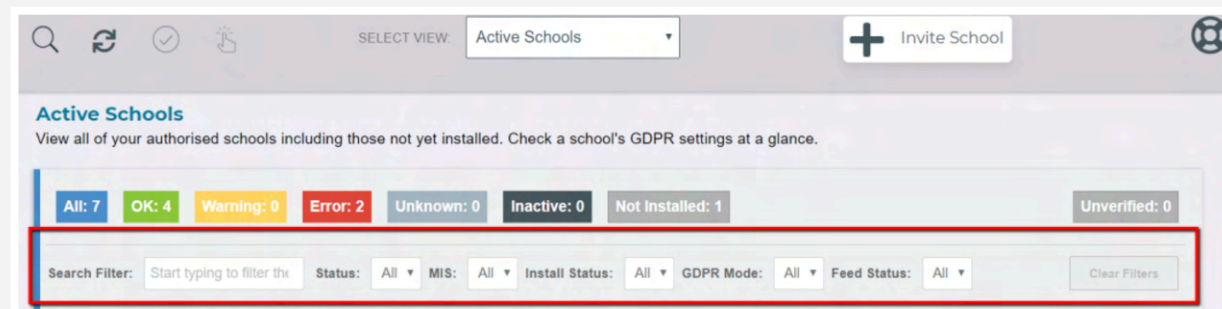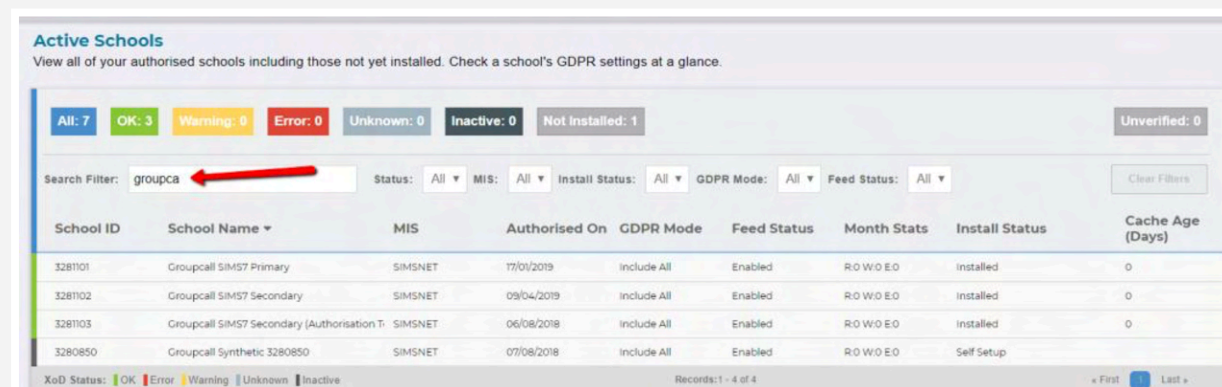## Filters & Columns

From the Active Schools View, most of the Columns will have corresponding Filters at the top of the list of schools:

Search Filter: To reduce the list, start typing the name of a School, MIS, Install Status etc. The list will return all results that include what you have searched for across information in the Columns.


Status Filter: Use this filter to view all schools with a specific XoD status (i.e. OK, Error, Not Installed).

MIS Filter: Filter your list of Active Schools by their MIS type.

Authorised On Column: Check the date your school authorised data sharing with your platform.

Install Status Filter & Column: Check schools that have authorised data sharing with you but have not yet completed their MIS agent installation.

Onboarding Queue: means that the school have not chosen an installation type – re-inviting schools with this status is the most effective way to resolve and allow schools to choose. If the school have booked an appointment with our team, you will see the time and date in this column.
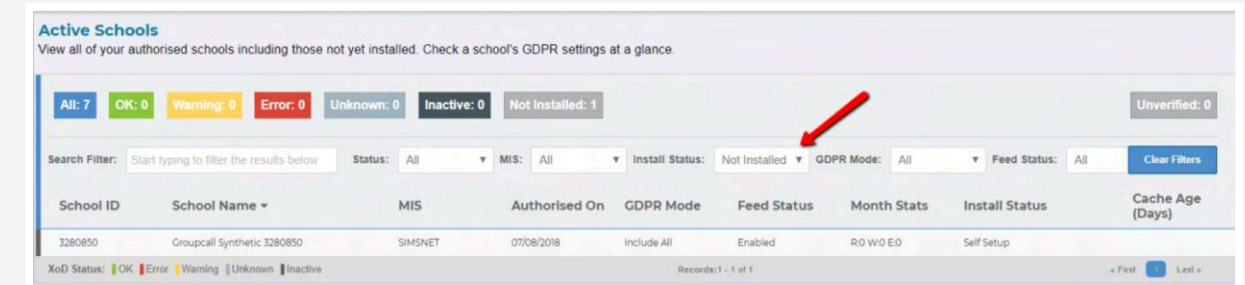
GDPR Mode Filter & Column: There are two modes that schools can choose: Exclude All or Include All. Schools can configure this in their own Manage UI.

Exclude All: Only persons (covered by your authorised scopes) that have been explicitly selected for your app will be available when you make API calls.

Include All: All persons (covered by your authorised scopes) will be available for your app when making API calls. Schools may have explicitly excluded individuals and these records will not appear.

Feed Status Filter & Column: Schools can choose to Pause your access during authorisation, so they can make specific changes to the persons included in your feed. Paused feeds must be Enabled by the school before you can access data.

Actions

Click on a school to display the Actions menu.

Set/Remove Priority [Legacy]: This is a legacy feature that is no longer supported in this view. It is still supported in the Pending Authorisation view.

Revoke Access: If you no longer require access to this school's data, click Revoke Access and follow the steps you see in the wizard. Select the date from which you wish access to be revoked from.

Note: Once you have revoked access for the school, they will need to re-authorise data sharing should you ever require data in the future.

Pending Authorisations

This View will show a list of all schools that you have invited to share data via Xporter. Schools will appear in this list if they have not yet completed the data sharing authorisation steps for your service.

Note: Schools displayed in this view may or may not have their MIS agent setup already

Filters & Columns

Filter the list of schools on this View by typing into the Search field.

Filter to Priority School: If you have marked a school as Priority in the Actions menu, you can tick this filter to display just those schools.

SchoolContact Column: Ensure that the right contact is receiving the reminder emails (sent every week). To update this contact to a new one, follow the +Invite School process.

Status Column: Ready to Authorise confirms that the school have a working Xporter install, but their data sharing authorisation for your app is still outstanding.

Install Type Column: Onboarding Queue means that the school have not yet clicked on their first onboarding email to pick an installation type. If the school have booked an appointment with our team, you will see the time and date in this column.

Actions

The Actions menu slightly differs here. It includes the Action to Cancel Invite. Use this action for a school that no longer wishes to continue the onboarding process for you.

Note: Once you cancel the invitation for a school, you will need to follow the +Invite School process if this school wishes to start again in the future.

Revoked Schools

This View displays a list of schools that had previously authorised data sharing with your platform but have since revoked it.

Filters & Columns

Use the Search field to reduce the amount of results.

Actions

From the Actions menu on this View, you can re-invite a school that previously revoked your access.

Active Cases Tab

This shows which school have an active case and how many. Currently 30 days after closure these are removed (which is being addressed to show permanently.) You can comment on a case directly to get an update from the agent - don't forget to hit that 'refresh' button to get the most up to date status check.

🏫 How To Invite A New School

You can kick off the onboarding process for your schools via Manage for schools in England and Wales.

This feature should be used for all partners that do not have the API invitation process setup. If you would like to find out more about the API invitation processr email **partners@groupcall.com.**

1. From the top right of your Manage page, you will see a +Invite School button.
2. You will then need to fill in all the required fields in the Register School wizard. Please ensure that the school contact you enter is authorised to share data on behalf of their school.

If you need to register an international school, get in touch with us and send the following information:
- School Name & Address
- Main Contact Name, Number and Email
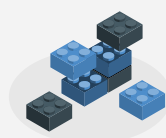
Check Active Support Cases

Check the status and any relevant feedback for support cases linked to schools that were raised for your platform. Please take Active to mean not closed.

1. Locate a school via a list or the Search icon. Click on the school to display its pop-up tile.
2. Click the Active Cases tab from the left. If there are any open cases already linked to your platform, you will see them displayed here.
3. Click on a case to display further information and comments. You can also click Add comment if you wish to update the Support Team with additional information. This will be added to the support case for agents' attention.
4. If you need to escalate an existing case, please **use this form.**

Check Authorisation Status

As well as checking whether a school has authorised data sharing for your app,

It is important to check whether the school have enabled their feed and the method of data sharing they have selected. This is useful when troubleshooting for missing data.

Has the school authorised data sharing with you?

1. Locate a school via a list or the Search Icon.
2. Click on Authorisation Logs to determine when/ if the school authorised data sharing with you.
3. A school must authorise data sharing with you before you can fetch data.

Has the school enabled their Feed?

1. During the authorisation process, the school may have chosen to pause their feed while they filter out data that they do not wish to share with you. To check this, go to the Active Schools View and locate the school via the list Search field.
2. Check the Feed Status Column – if it is marked as Paused for the school, this will prevent you from receiving any data from this school.
3. The school can enable the feed from their own Manage platform. If they are unsure on their Manage credentials, please ask the school to get in touch.

The Feed is Authorised but I've still got no data!

Make sure to check the GDPR Mode Column to confirm whether the school has chosen to share all persons with you by default, or to only share those that they specifically select.

Often schools choose to not send data by default and then forget to make selections. Schools can update this configuration from their view in the Manage portal.

Resend Invitation

The school contact that you initially registered will receive a reminder email every Tuesday and Thursday afternoon, until they have processed the invitation to share data with your app.

However, you may need to resend the invitation email to a new contact (e.g. the initial contact has left).

You may also need to resend the Xporter invitation if your data sharing scopes for a school have changed, as the school will need to re-authorise data sharing with you to enable additional data scopes.

FAQs

A student/ teacher/ parent/ class isn't coming through:

• Check what the school's GDPR mode and Feed status is? For instance, if they have chosen Exclude All – they need to make sure the right individuals have been ticked in their School Portal.
• Similarly, if their Feed is Paused, the school need to Enable it from their own Manage Account.
• Check your own integration to confirm whether you can see the missing info/ individual in API responses from https://xporter.groupcall.com

When will the Xporter MIS agent be installed for the school:

• Check what the Install Status is (from your Active or Pending Authorisation Views) for the school.
• If it is Onboarding Queue, this means that the school have not yet started the onboarding. process. They will need to click on the link in the Xporter email they received to pick an install type.
• If it is Booked a Slot with a date in the past, click on the school and then click Active Cases to check why there has been a delay.

How do I chase a school to start the onboarding process/ How do I resend the authorisation link to a school?

• Schools get sent a reminder email every Tuesday and Thursday afternoon.
• However, you can also follow the steps to Resend the invitation email.
• Click below to view what schools need to do once they receive their email:
> **Classic Authorisation** (they need Xporter credentials)
> **Authorisation 2.0** (they need a magic link)

How do I go about troubleshooting data issues myself so I can provide enough detail in my case?

Watch **this video** created by our partner team for an overview.

Raising A Support Case

1. Please first check **our knowledge base** for a guide to resolution and ensure the school has attempted any basic troubleshooting steps such as restarting services or reviewing our FAQs. If the issue persists please then raise a case (alerting the school so as to prevent duplication) and confirm the actions taken to resolve. This will ensure engagement from the school when our team gets in touch**.**

2. Locate the school you wish to report via a list view or the Search icon. Click on the school to display its pop-up tile.

3. Click the Active Cases tab from the left.

4. From the top, click New Case.

5. Complete all the fields on the page. Enter the contact information for the person who can assist the support team in resolving the issue. Add any additional contact information in the Description box if required.

6. As well as the mandatory fields, please ensure you include a summary of the error you have and where you are seeing it.

7. Before you get in touch, please ensure you have checked your own integration with xporter.groupcall.com and confirmed that the missing incorrect data is definitely not present in responses from the API.
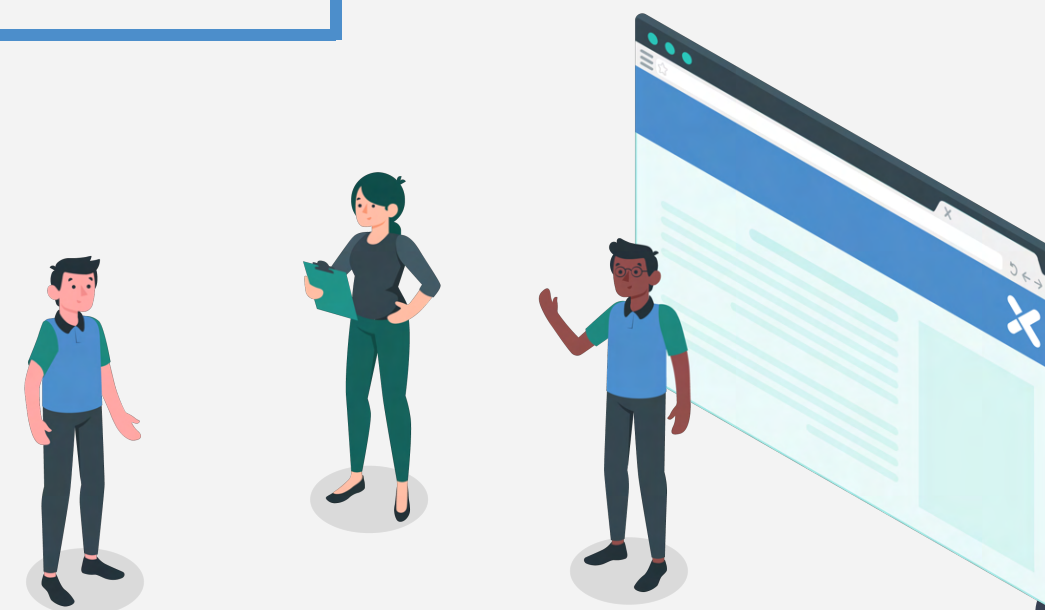
For more information about xporter, or anymore support, please contact us.

E: partner@xporter.uk
W: xporter.uk