

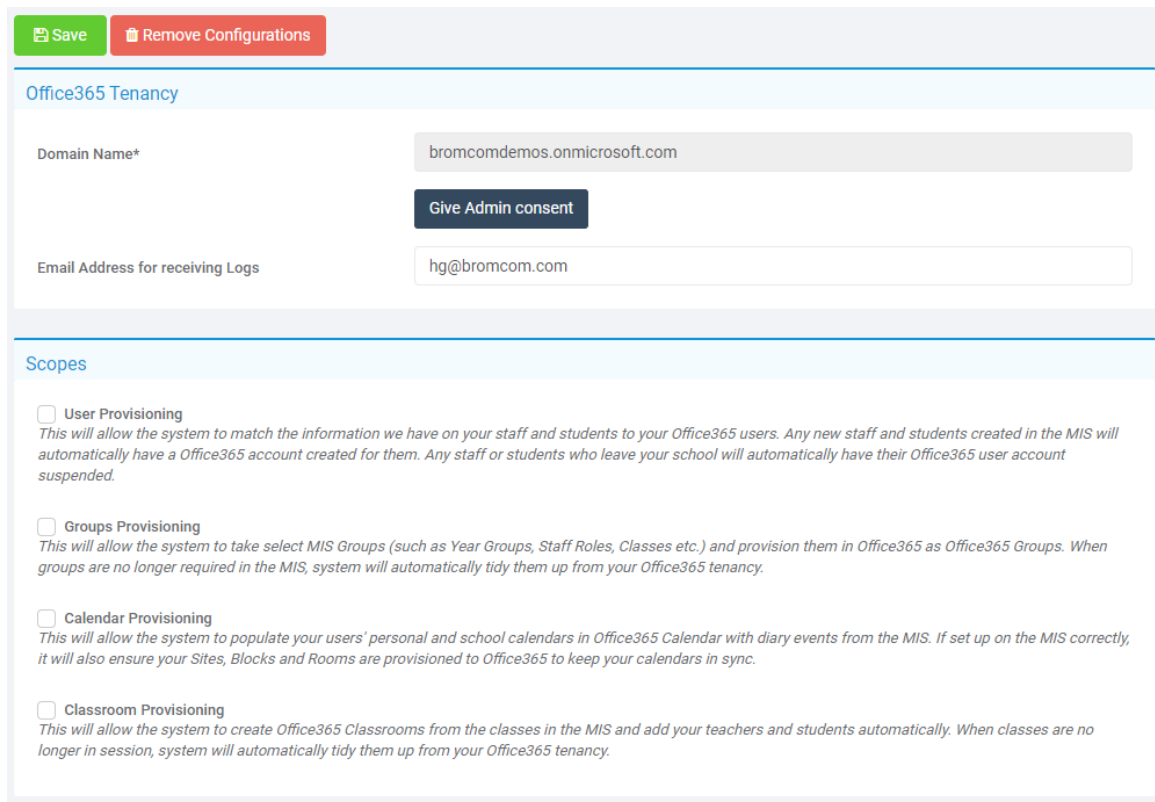
OFFICE365 INTEGRATION GUIDE

BROMCOM MIS CONFIGURATION & ADMIN CONSENT

There is a dedicated page within the Bromcom MIS, which provides all the configuration settings to setup provisioning between the Bromcom MIS and your Office365 Tenant.

Login to Bromcom MIS and go to **Config > Setup > Office365 Integration**

If you are successfully licensed, you will be presented a screen similar to the one below.



Save **Remove Configurations**

Office365 Tenancy

Domain Name*

Give Admin consent

Email Address for receiving Logs

Scopes

User Provisioning
This will allow the system to match the information we have on your staff and students to your Office365 users. Any new staff and students created in the MIS will automatically have a Office365 account created for them. Any staff or students who leave your school will automatically have their Office365 user account suspended.

Groups Provisioning
This will allow the system to take select MIS Groups (such as Year Groups, Staff Roles, Classes etc.) and provision them in Office365 as Office365 Groups. When groups are no longer required in the MIS, system will automatically tidy them up from your Office365 tenancy.

Calendar Provisioning
This will allow the system to populate your users' personal and school calendars in Office365 Calendar with diary events from the MIS. If set up on the MIS correctly, it will also ensure your Sites, Blocks and Rooms are provisioned to Office365 to keep your calendars in sync.

Classroom Provisioning
This will allow the system to create Office365 Classrooms from the classes in the MIS and add your teachers and students automatically. When classes are no longer in session, system will automatically tidy them up from your Office365 tenancy.

- **Domain Name:** You need to contact the Bromcom Support and request the domain name set due to security reasons. Some tenants may have more than one domain set and this should not be changed prematurely as this will cause issues.
*Example: **bromcomtechnologyschool.com***

Note: You will need to let us know what Domain Name you are using and want added. So please have this information ready when contacting the Bromcom Support.

- **Email Address for receiving logs:** Enter the email address to receive daily summary logs for the provisions, this will happen automatically once the automatic synchronisation is configured. *Please see the important note regarding the auto sync at the end of this guide.*
*Example: **mis-admin@bromcomtechnologyschool.com***

Once you are happy with the configuration, please press the **Save** button then press the **Give Admin Consent** button. This process will take you to the Microsoft Tenant Wide Consent screen and will list all the permissions that Bromcom's Office365 Integration requires to manage the provisioning and any future enhancements we have in our development roadmap. Once you review the list and are happy, press the **Accept** button and you will be redirected back to the configuration page. Where if everything is good, the page will confirm the settings are saved and you will see a **Remove Configuration** button. This means, all settings are configured and the two systems are connected successfully. If you get any error messages, please contact Bromcom Support to be investigated. A Global Admin account must be used to provide **Admin Consent**, normal tenant users do not have permission to give admin consent as behalf of the tenant. Please contact your Schools or MAT's IT Support to make sure this process is carried out by their accounts.

SCOPE CONFIGURATION

USER PROVISIONING

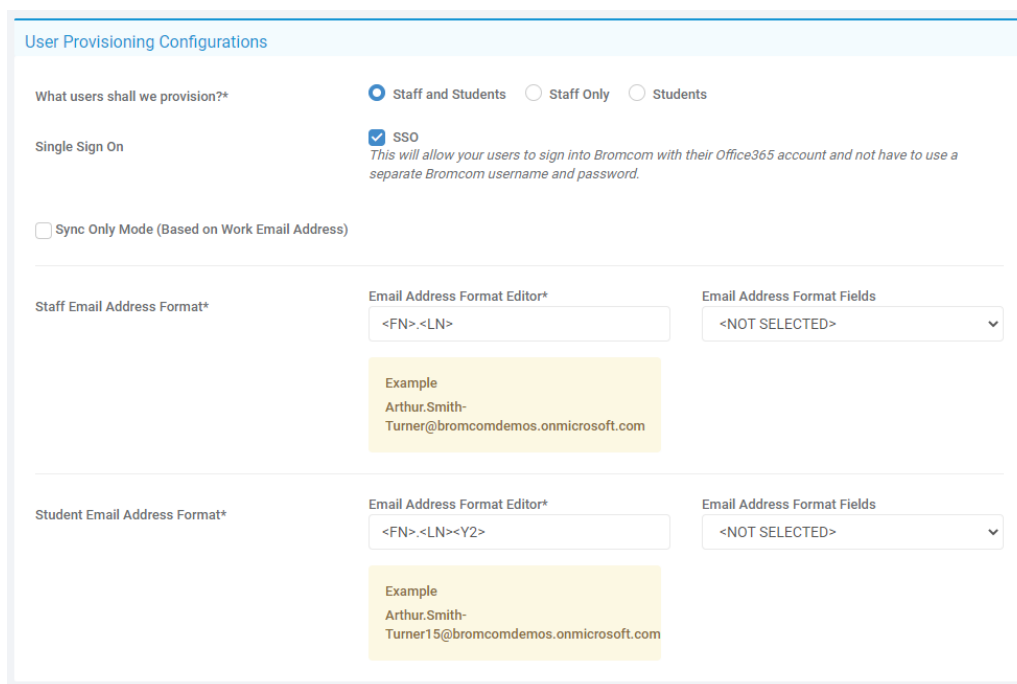
This will allow the system to match the information we have on your staff and students to your Office365 users. Any new staff and students created in the MIS will automatically have a Office365 account created for them. Any staff or students who leave your school will automatically have their Office365 account suspended.

Once this option is ticked the following settings panel appears where you can configure the user sync, for instance what email address format you want to create for students and staff and set security groups for the students and staff that you want to include when their accounts are created. If you leave this option not set the system will not add any newly created students or staff accounts into any security or licensing groups, so you need to make sure this process is carried out.

You can also configure the system to set Single Sign-On. If this option is ticked, the system will associate the Office365 Account to the Staff's Bromcom MIS Account and Student's Student Portal Account, if it exists.

When the Sync Only Mode option is used the system will not create any Office365 accounts for any users and it will only try to match the staff and student accounts based on the Work Email Address in the MIS. This option is generally for schools or MATs who have local Active Directory Setup and they sync their local Active Directory to Office365 Tenant.

** We strongly advise that talk to your IT Support before deciding if you need to use this option or not, as this may cause conflicts if local Active Directory is a master source.*



The screenshot shows the 'User Provisioning Configurations' page. It includes the following settings:

- What users shall we provision?***: Radio buttons for 'Staff and Students' (selected), 'Staff Only', and 'Students'.
- Single Sign On**: A checked checkbox for 'SSO' with a note: 'This will allow your users to sign into Bromcom with their Office365 account and not have to use a separate Bromcom username and password.'
- Sync Only Mode (Based on Work Email Address)**: An unchecked checkbox.
- Staff Email Address Format***: An 'Email Address Format Editor*' field containing '<FN>.<LN>' and an 'Email Address Format Fields' dropdown menu set to '<NOT SELECTED>'. An example shows 'Arthur.Smith-Turner@bromcmdemos.onmicrosoft.com'.
- Student Email Address Format***: An 'Email Address Format Editor*' field containing '<FN>.<LN><Y2>' and an 'Email Address Format Fields' dropdown menu set to '<NOT SELECTED>'. An example shows 'Arthur.Smith-Turner15@bromcmdemos.onmicrosoft.com'.

User Sync page has the following options:

- **Sync User:** When this button is pressed the system will try to match the users based on the work email address in the student and staff details, if it cannot be matched, an Office365 account will be created for each member of staff and student. This option can take up to 20 minutes to run, also in rare occasions the Office365 API may reject this due to high volume, if this happens you will need to run the **Sync User** option again and the system will continue to work where it left off.
- **Simulate Sync User:** This option simulates the **Sync User** option. This option **DOES NOT** create or update any accounts, as result of this operation the system gives a summary of what will happen. You can check the summary before you

execute the actual **Sync User** option. This option is very useful if you are running the provisioning for the first time, so you can make sure the system will not do anything unexpected.

- **Manual Match:** If the system cannot match users automatically, to avoid duplicate account creations, you can use this option to manually match student or staff records with an Office365 account. This option is very useful, if the person, who manages the Office365 Integration does not have student details records or does not have permission to update email records.
- **Create User:** This option allows you to create an Office365 account based on selected students or staff.
- **Sync Exclusion:** This option can be used to exclude any student or staff from User Sync operations, so the system does not automatically create or deallocate accounts for these users. This option is mainly useful for trusts, who have central management records and their email addresses sit on a different domain and should not be managed by this system.
- **Unsynced Users:** This option shows a list of students and staff that are not synced. This can be for various reasons, either the students and staff have been recently added, they are excluded from sync or an error has occurred during sync process, more detail can be seen under Logs.
- **Logs:** This provides daily logs of all operations happened

IMPORTANT NOTE: Before Office365 Accounts are created for any staff or students, the system will check EMAIL records associated for each member of staff and students to see if there is already an Office365 account generated in Office365 Tenant, if any WORK email record are found the system will match the student or staff member with that Office365 Account automatically without checking the Office365 Account's email address.

GROUPS PROVISIONING

This will allow the system to find MIS Groups (such as Year Groups, Classes, etc.) and provision them in Office365 as Office365 Groups. When groups are no longer required in the MIS the system will automatically tidy them up from your Office365 tenancy. Configuring this is simple, you need to select the group types/options available and the system will generate these Office365 groups (not classrooms) automatically and attach the members based on User Sync mappings created in the first place. The Group Sync page allows you to Include or Exclude Users (students or staff) manually if needed. Staff members are automatically added as owners and students are automatically added as members.

Group Settings

- Student Year Groups
For example - Intake Year 2019, Intake Year 2020 etc.
- Student Subject Groups
For example - Maths, English, Geography etc.
- Student Tutor Groups
For example - 10A, 09B etc.
- Student Houses
For example - Gryffindor, Slytherin etc..
- Student Clubs
For example - Breakfast Club, Berlin Trip, Chess Club etc.
- Key Stage Year Groups
For example - KS2, KS4 etc.
- Teaching Classes
For example - Year 10 History A, Year 4 Reading Green Group etc.

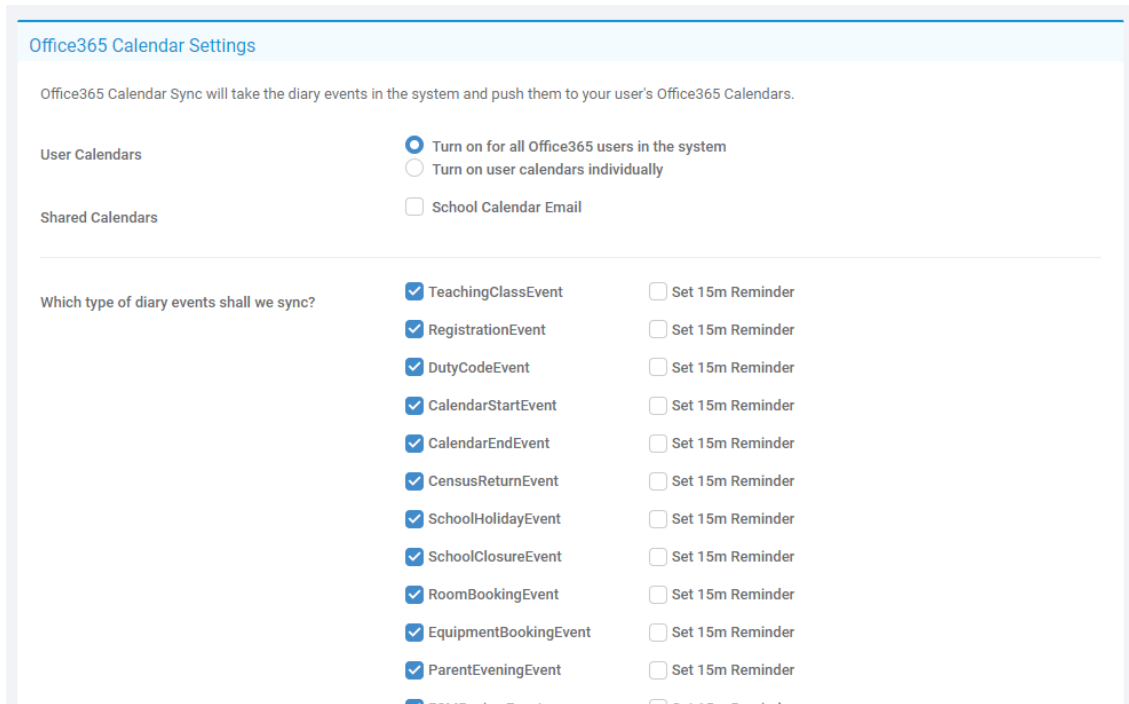
CALENDAR PROVISIONING

This will allow the system to populate your users personal and school calendars in the Office365 Calendar with diary events from the MIS. There are two options to work with, either you can choose the system to push all users calendars from the Bromcom MIS to the Office365 Tenant or you can manually add the users that you want this to happen to. Depending on which option is selected, the Calendar Sync page allows you to manage those users manually.

Calendars are synced based on the **Complete Diary** view under Diary module. Whatever events you can see on the Diary Module, you can configure those events to be selected to be synced and decide if you want to set a reminder or not.

On the Calendar Sync page, we provide an exclusion option, if you want to exclude any users calendars sync for whatever reason, you can use this function to add to the user(s) to the exclusion list.

Note: Only the next 30 days of the calendars are provisioned each time when the synchronisation runs. Users will not be able to see more than 30 days on Office365.



CLASSROOM PROVISIONING

This will allow the system to create Office365 Classrooms (Teams) from the classes in the MIS and add your teachers and students automatically. When classes are no longer in session the system will automatically tidy them up from your Office365 tenancy.

** This feature is ONLY available for Education Tenants; you cannot create classrooms on Business/Non-Education Tenants.*

Classroom provisioning does not have any finer configuration options. It's either **ON** or **OFF**. This provisioning tool finds all classes and tutor groups and creates a classroom record under the Office365 Tenant and allocates the staff or students accordingly.

- **Sync All Classrooms:** When this option is used; it finds all classes and tutor groups active today and if they do not have a classroom (Classroom) record created within Office365 Tenant, the system creates it again. Unfortunately, there is not a way to match classrooms automatically. If you require your existing classroom records mapped classes/tutor groups, please use **Match from CSV** option.
- **Simulate Sync Classrooms:** This option simulates the **Sync All Classrooms** option. This operation does not create, update or delete any classrooms. This may take some time to run and at the end of the operation the system will display a summary pop-up which details what will happen as a result of this sync. We advise you to run this simulation before you run the actual Sync.
- **Manual Match:** This option can be used to import classroom and MIS class/tutor group mappings in bulk. This will need 2 columns in CSV; one is for Office365 ID and other one is Group ID within MIS (which can be obtained via AdHoc reporting).
- **Match from CSV:** This option can be used to match existing classroom and MIS class/tutor group via CSV file. This option requires the CSV files to have two columns to work.
 1. CollectionID or GroupID from MIS – this can be easily exported via AdHoc Reporting

2. Office365 Classroom Email Address – you need to export this from your Office365 Tenant and manually populate the CSV file.

- **Create Classroom:** You can use this option to create any classroom record manually.

Note: Classrooms in Office365 Teams are created with Academic Year appended to the beginning of the class name or tutor group name (i.e. 2020-10AEn/2). The purpose of academic year appendment is to differentiate any classrooms that may be left open and have no end date for any reason.

Note: If you are in the process of end of year/beginning of year, we advise you to wait until first academic day start before you run the sync.

IMPORTANT NOTE: Automatic Schedule of Office365 Integration is managed by Bromcom Centrally. Once you setup your provisioning options and run the full sync once yourself and are happy with the outcome. Please send an email to us via app.developer@bromcom.com and request your schedule to be turned on. **Auto sync will run sometime between 6pm and 6am** – as this is managed centrally by Bromcom, there no guaranteed time slot that you can configure.