ScholarPack Pre-Migration Data Check Guide

Completing a data cleanse in ScholarPack ahead of your move to Arbor is one of the most important actions you can take to ensure the migration goes as smoothly as possible.

To help you with the data cleanse, Arbor has created a workbook that includes two checklists. These checklists are "Pre Migration Data Checks and Cleanse" and "Pre Migration Data Counts" – they are solely for your benefit and reference and does not need to be sent to Arbor once completed.

You can download the workbook from the bottom of this page.
In this article we have provided you with some extra guidance to go along with the data checks workbook and an explanation of how to complete both checklists below.

Pre-migrations data checks and cleansing

In this article we We've put an explanation of how to complete both checklists below

The first thing you need to do is complete the pre-migration data check and cleanse (the first tab of the workbook).

Completing this is **essential** for a successful smooth data migration. These checks will:

1. Give you an idea of the quality of your data before you send it to Arbor.
2. Make sure that there is no duplicate information and the data in ScholarPack is up-to-date, formatted correctly, and in the right place.
3. Reduce the chances of migration errors, and make sure you can get started with your new Arbor system straight away!

You should start completing these checks and cleansing tasks as **soon as possible.** The migration will have the best outcome if you complete these **before** you send us your data on your migration date. We have provided more information in the checklist on what to look for in ScholarPack and why it is important.

Pre-Migration Data Checks + Cleansing

We've prepared these data checks and cleansing tasks for you to complete in your Scholar Pack site. This will help to make sure that the data we import to your new Arbor system is as accurate as is possible.

This spreadsheet is for your use only and does not need to be sent to anyone at Arbor once completed.

This workbook has **two** tabs. Please complete both before migration.

Ref	Field	What should I check?	Why do I need to check this?	How do I clean it up?	Done?
1 School Structure					
1.1	**Holidays**	Check that your holidays are set up correctly with no overlapping dates or duplicate entries for the same holiday.	We use your holiday structure to determine academic year start and end in Arbor. Having duplicate entries for the same holiday period in Scholar Pack may result in duplicate academic years and term dates within Arbor.	Make sure there are no duplicate holidays. To see all of your holidays go to *Admin > Config > Core > Holidays.*	No
2 Staff Data					
2.1		Check that staff have a **work email address** on their staff profile.	This will become their Arbor username. **Staff will not be able to log in to Arbor without an email address.**	Add a work email address to their profile. This should only be in the **'primary email'** field and not the 'secondary email' field.	No
2.2	**Staff Email**	Check that all staff emails are accurate and do not have any typos or errors.	This will become their Arbor username. **Staff will not be able to log in to Arbor without an email address.**	Amend any errors You can see all staff email addresses by going to *Reporting > Report > Details* (in the green staff section).	No
2.3		Check that staff work email addresses are **only used once** in your current MIS. i.e. Any staff members that are also student contacts (guardians) at the school **must** have a personal email and not a work email attached to the contact information on the students profile.	If staff emails appear on the guardian profile following migration, that staff member **will not be able to log in to Arbor** until it is removed.	Locate any duplicate staff email addresses. Go to *Reporting > reports > email addresses* (in the blue students section) this will show all the emails for the student contacts on the students profile. You will then be able to see if any staff email addresses are present – Remove any staff email addresses and replace it with their personal one.	No
2.4	**Staff Contracts**	Check that any old staff contracts have an end date.	If historic staff do not have an end date on their contract, they will migrate as active staff members, and you'll need to delete them from Arbor.	Add end dates to all contracts. To help with this go to *Reporting > report > contracts* and make sure to tick **include inative staff members** and **expired contracts**. This will allow you to see all staff contracts.	No

## Reports that aid with your data checks

There are reports that you can run in ScholarPack that will help you to check and update information in bulk - details on how to find these reports are below. Go to **Reports > Reporting** and you will then see all the reports in ScholarPack categorised by Students, Staff and more.
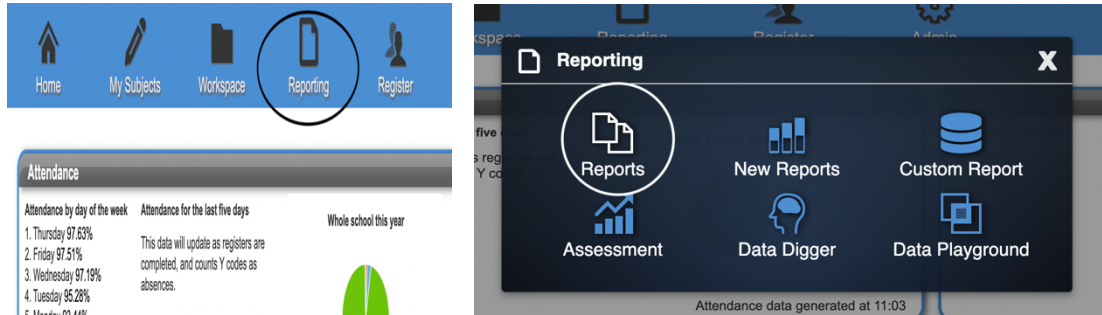
Run the **Details** report in the staff section to aid with **2.2**, **2.5** and **2.7** of the spreadsheet – You can see all staff members and their details by going to **Reporting** > **Report** > **Details**.
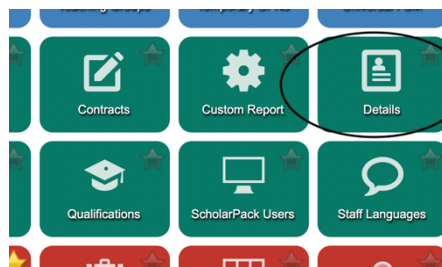
Run the **email addresses** report in the student section to aid with **2.3** of the spreadsheet – You can see all the email addresses of guardians (student contacts) by going to **Reporting** > **Report** > **Email Addresses**. This will help you find any guardians that have their work email address listed instead of their personal one.
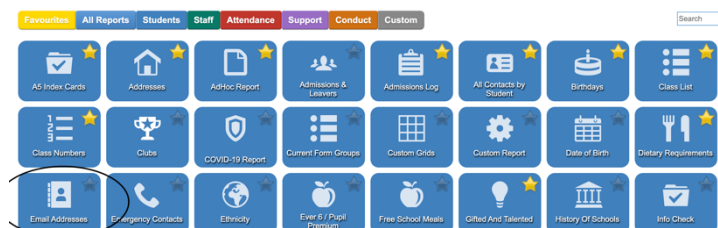
Reporting - Email Addresses

Select by year and/or form group to create a list of student contact email addresses that you can use with your email client.

Year [All Years ▼] Form [All ▼]

Show contacts with contact order [7 ▼] or less.

If you would like to use these email addresses in your mail client we recommend you use your school email in the To: field and insert contact email addresses in the Blind Carbon Copy (BCC) field so that no one can see who else was emailed.

Don't show student details, just show email addresses: ☐

Please note that many email providers limit how many emails can be sent in a 24 hour period and some limit how many recipients you can add per email. If you are limited to a specific number of recipients then you can set a number here and we will group the emails in to separate lists so you can send multiple emails.

List addresses in groups of: [3]

[views]

Student First Name	Student Surname	Year	Form	Contact 1 Email	Contact 2 Email	Contact 3 Email	Contact 4 Email	Contact 5 Email	Contact 6 Email
Miya	Anderson	-1	CF	Harry Anderson <Harry.Anderson@example.co.uk>	none	none	none	none	none
Rocco	Fraser	-1	SR	Geoffrey Harrison <Geoffrey.Harrison@example.co.uk>	none	none	none	none	none
Hannah	Baker	0	PAR	Gemma Baker <Gemma.Baker@example.co.uk>	none	none	none	none	none
Gemma	Estall	0	PAR	Thomas Estall <>	none	none	none	none	none
Joshua	Axford	0	TUC	Dylan Axford <axfordd97@protonmail.com>	none	Sophie Gray <>	none	Caron Axford <>	none
Paul	Conway	0	None	Paul Brown <Paul.Brown@example.co.uk>	none	Fiona Ellis <Fiona.Ellis@example.co.uk>	none	none	none

Run the **Contracts** report in the staff section to aid with **2.4** of the workbook – You can see all staff members and their contract start and end dates by going to **Reporting** > **Report** > **Details**. Make sure to tick to include inactive staff members and expired contracts this will allow you to see all staff contracts.
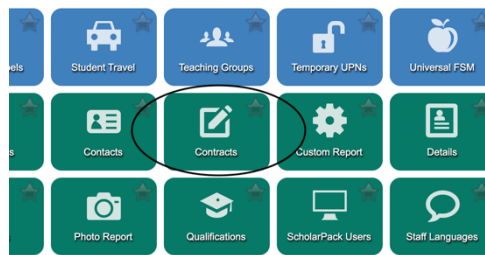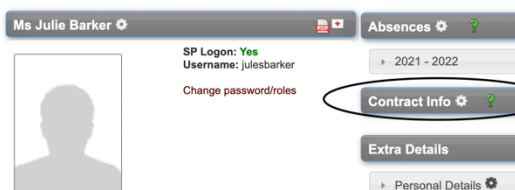

Reporting - Staff Contracts

Show Inactive Staff Members: ☑
Show Expired Contracts: ☑

Staff Contract Details, Including Inactive Staff , Including Expired Contracts

Firstname	Surname	Date of Birth	Ethnicity	N.I Number	Post	Role Identifier	QTS	QTL	EYT	Contract type	School arrival date	Contract start	Contract end	Daily rate	Destination code
Georgie	Bloom	02/06/2001	White - British		Other Support Staff		No	No	No	Permanent	01/02/2022	01/02/2022		No	
Mark	Brown	16/02/1959	Information Not Yet Obtained	QQ533572O	Executive Head Teacher	Head Teacher	No	No	No	Permanent	22/06/1996	02/10/1996	02/12/2022	No	
Mark	Brown	16/02/1959	Information Not Yet Obtained	QQ533572O	Support Staff	Head Teacher	No	No	No	Permanent	22/06/1996	22/06/1996	08/04/2022	No	

If you find any staff members with an incorrect start / end date or without one – go to the staff members profile and click then **white cog** next to '**contract info'**, you will then be able to edit their start and end date.

Staff - Adding contract for Julie Barker

Run the **Admissions and Leavers** report in the Student section to aid with **3.5** and **3.7** of the workbook – You can see all students and choose whether it shows current, former, future or all students by going to **Reporting** > **Report** > **Details**. Make sure to tick current, former and future for 3.5 but only tick former for 3.7

Run the **All Contacts By Students** report in the students section to aid with **4.1, 4.3, 4.4,** and **4.6** of the workbook – You can see all student contact (guardian) details including their postal address, email address, mobile number and responsibility status by going to **Reporting** > **Report** > **All Contacts By Students**.

For section 1.1 of your workbook you can view your holidays by going to **Admin > Config > Core Setup > Holidays.**

For section **2.1** of your workbook you can edit staff email addresses by going to the staff members profile > click the **white cog** next to their name > then make sure the address is in the '**primary email**' field.

For section **2.6** of your workbook you can view all staff members DBS numbers by going to **Admin > Personnel > Central Register.**

For section 3.1 of your workbook you can view and edit their FSM status by going to the **students profile** > clicking **extended** > scrolling down to the **further information** section. To do this in bulk where you can see a list of students go to **Admin > Students > Manage FSM.**
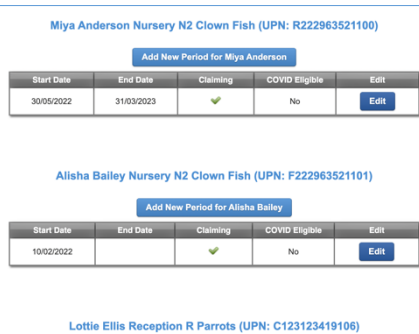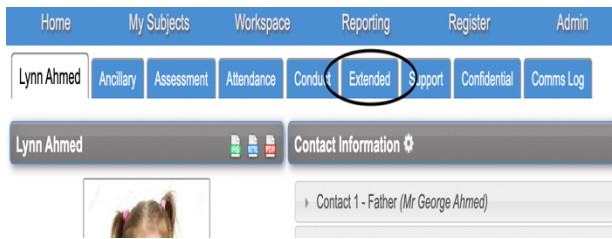
For section **3.2** of your workbook go to the **students profile** > click **Extended** > Scroll down to **support information** for care leaver status (3.2). For 3.3 follow the same steps an scroll down to **Service child information** to check the service child status.
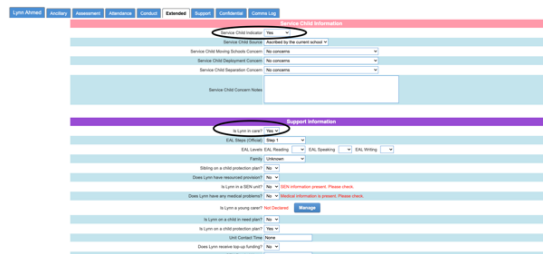
For section **3.4** of your workbook go to the **students profile** > click **support** > then click the **white cog** next to **SEN** to enter the SEN provision and set the start and end dates. To manage the SEN needs scroll down to the Needs section and click **edit.**
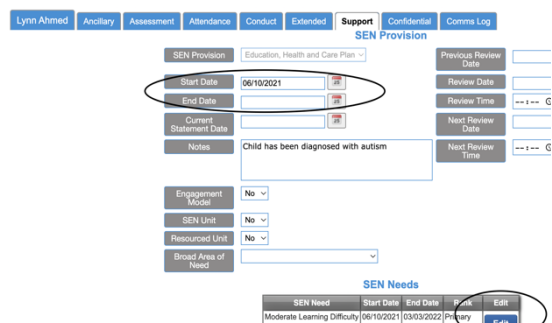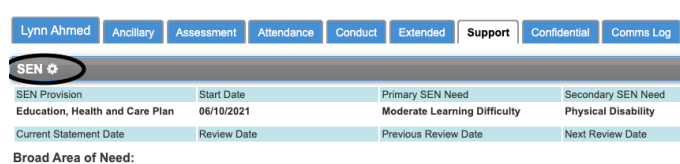
For section 4.2 you can see duplicate student contacts by going to **Admin** > **Config** > **Manage Duplicate Contacts.** From there you will be able to merge them if needed.

Contact Management

Manage Duplicate contacts

We have identified the following contacts as possible duplicates

Contact to keep	First name	Middle Names	Surname	Gender	Email	Phone	App User	Address	Students	
● Will be kept	Gail		Platt	M			No		Sarah Platt (8904)	Exclude from merge
○ Will be removed	Gail		Platt	F			No		David Platt (8905)	Exclude from merge

Merge   Deselect

For section **4.3** of your workbook, once you have run the report listed in the report section of this guide you might need to make some changes to find the '**address as pupil'** field. To do this go to the **students profile** > click the name of the student contact of your choice > click the cog next to their name > select '**yes**' if you would like the guardian and student to migrate over as living at the same address and make sure the addresses match exactly.

Follow the same steps for section **4.6** when trying to edit the '**responsibility**' field – go to the **students profile** > click the student contacts name > then the cog next to the student contact, set the responsibility field to **yes** if you would like them to migrate over to Arbor as a **primary guardian.**

For section 4.5 all of the student contacts information should be in the contact information section on student profiles, if they are not in this section they will not migrate over to a guardian profile in Arbor.

Pre-migration data counts

When migrating data from one system to another, it's essential to compare the data in each to make sure that everything has carried across.

The quickest way to do this is to count key metrics in ScholarPack on the day you take your backup, and then compare these to Arbor when you go live.

Work through the checklist provided in the workbook before sending Arbor your data, completing the "Current MIS" column with the figures required.

Once you have access to Arbor, you'll be able to complete the "verified in Arbor" column and are looking for the numbers that match between both systems. You can also use our Data Migration Report in Arbor to check the numbers match.

ScholarPack Data Checks Workbook

Click the link above to download the data checks workbook.