

# Moving to Arbor - Manual Migration

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## Before you get started

This document is designed to give an overview of the Manual Migration process prior to your school starting onboarding. It has been created to help gather all necessary information about your upcoming move to Arbor which will allow you to plan and prepare for a manual migration journey at your school.

## What is a Manual Migration?

A Manual Migration is a way of moving data from one MIS to Arbor. A Manual Migration must be completed when a school is moving to Arbor from a system that we can not pull the data from automatically.

You/the school Project Team will be manually gathering the data from and inputting it into a blank Arbor MIS in readiness to be able to take attendance and be census compliant.

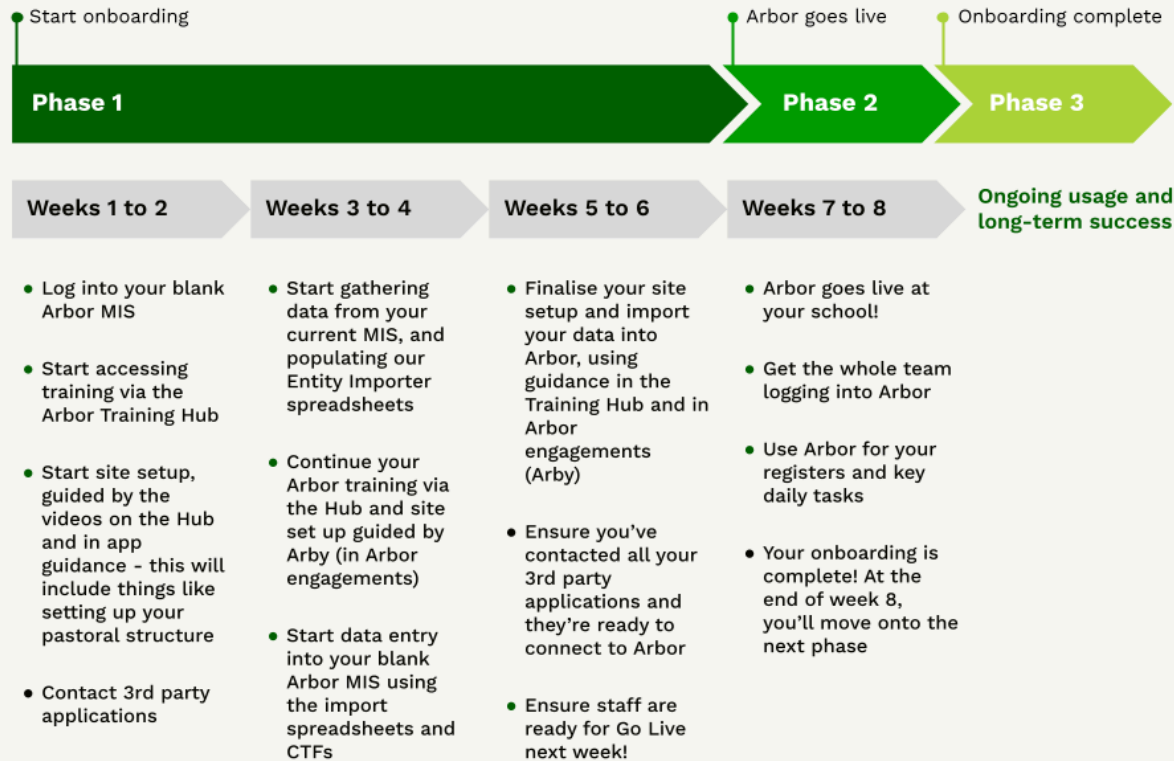
Due to the significant difference in how data is stored in your current MIS and how it will be stored in Arbor, Arbor does not have an automatic migration tool. We have created a clear 8 week onboarding journey for Manual Migration schools, with step by step instructions each week, to guide you through the site setup process yourself, as well as an in depth training. Unfortunately, Arbor cannot add the data into Arbor for you and this must be completed at school level.

## Onboarding Timeline

Below is an overview of the onboarding journey and timeline. As you can see, the onboarding journey lasts 8 weeks in total. There are 6 weeks before Go Live, and 2 weeks after Go Live. [You can also see what's coming by looking at this Week by Week guide on our help centre.](#)

**Top Tip!** Your Go Live date is the day you'll start taking attendance in your new Arbor MIS. This is the start of week 7, and by this point your new Arbor MIS should be setup, and you should have added all the data to Arbor to get going and start using Arbor for the daily tasks as your school.

# Your onboarding timeline



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In **Week 1**, you will receive a welcome email from the onboarding team who will provide you with some key information to start your onboarding, such as how to log into your blank Arbor MIS.

Once you're in your blank Arbor MIS, you'll be provided with guidance each week from Arby - our in MIS onboarding assistant. Arby will give you tasks to complete each week, such as watching a welcome to Arbor video and logging into the Arbor Training Hub to start you training.

During **weeks 2-6** you will complete your site setup and onboarding training via the Arbor Training Hub, start to gather and enter your data into your blank Arbor MIS, set up your key Arbor modules and prepare to launch your Arbor site to your wider team.

**All week by week guidance will be provided in your new Arbor MIS, via Arby (our onboarding assistant).**

By **week 7**, your site setup should be complete, and you will Go-Live with Arbor and start taking attendance in your new MIS for the first time!

In **week 8** you will finalise any training and complete setup of any additional modules in Arbor. You'll also move over to our Account Management team. This team is responsible for your continued success with Arbor and will take over from the onboarding team as a first point of contact.

## Training

You'll complete all your training via the Arbor Training Hub. You'll be given access to this in Week 1 of your onboarding journey.

**Completing all of the Training available to you in the Arbor Training Hub is essential for a successful onboarding and Go Live! You can see a breakdown of which sessions to complete before Go Live, and which to complete after Go Live [here](#).**

**Manual Migration Training** - This course will guide you through how to setup and enter data into your blank Arbor MIS. The course is broken down into modules which you can complete a week at a time during your onboarding.

**Onboarding Training** - Join bite-sized sessions that range from half an hour to two hours, designed specifically for your role, to learn everything you need to know about how to use Arbor - from taking attendance to managing student, guardian and staff data. Our expert group sessions will give you the tools you need to use Arbor features confidently from day one. Click [here](#) to see all of the sessions, and when to complete them.

## Data Gathering

There are 3 different ways you can enter data into your new Arbor MIS.

**Entity Importers** - Entity Importers are a series of spreadsheet templates that you can download from Arbor. You will gather your data and add it to these templates, which you will then be able to upload into Arbor in bulk to import the data.

The process of uploading and importing data into Arbor involves an automated tool which will help flag any discrepancies in the data and help you with keeping your data clean.

Please see our guide [here](#) which covers the Entity Importers in more detail. You will also have training on how to use these spreadsheets, as part of the Manual Migration course in the Arbor Training Hub.

**CTF's (Common Transfer Files)** - You will be able to transfer some basic student data via CTF uploads. CTFs imports include the following information:

- Student name
- Student DOB
- Student address
- Student identifiers such as UPN
- SEN status and need
- Previous attendance
- Previous school
- DfE assessment results
- FSM eligibility

Manual Data Input - There are some areas of Arbor that you will have to setup and add data to manually, such as setting up your Academic Structure, Pastoral Structure, School Details etc. Information of what you'll need to add manually is details in the Manual Migration course via the Arbor Training Hub.

Below is the information that needs to be added manually:

School Details & Pastoral Structure	Student information	Staff Information
Academic Years (add the oldest year first, the year your oldest current student joined)	Add student by CTF or Applicant Import Spreadsheet	Teacher/TA Status
Term Dates	Student enrolment information	Other staff data, including disability etc
Holidays	Funded Hours / Hours at Setting / Extended entitlement Hours Information	
Year Groups	<b>Post looked after arrangements</b>	
Registration Forms	<b>Consents (not required for census)</b>	
Houses	Documents (not required for census)	

## Attendance Data Import

This can be imported via an Entity Importer which you can download from Arbor.

We will ask you to extract your attendance data from your current MIS and populate the Entity Importer spreadsheet on the last day of term.

You will then need to add this data to your site ready for your next census.

Where possible we suggest you try to obtain this data prior to the last day of term to understand how this will be done and whether you need any help from your current MIS provider to obtain this data.

**Additional Information:** if you are going live with Arbor after the Summer Holidays (September) and planning on taking attendance when you return from your summer holidays, there is one more step you will need to take prior to your Go-Live.

Once you have added all of your data for the current academic year that you are in, you will then need to complete a New School Year Setup for the following year. You will take part in additional training which will go through the different steps to set this up in your site.

## Support

Throughout your onboarding you'll be supported by a highly knowledgeable team of people from different departments within Arbor who specialise in ensuring your onboarding and longer term journey with Arbor is a smooth and enjoyable one.

### **Onboarding Team**

In Week 1 of your journey the onboarding team will send you an email with instructions on the onboarding process and provide guidance weekly in Arbor and via email periodically. You can speak to them via email with any questions you may have about your onboarding journey by contacting [myonboarding@arbor-education.com](mailto:myonboarding@arbor-education.com)

### **Help Centre**

Schools will have access to the [Help Centre](#) - designed by our knowledgeable team it will give you access to many different articles, guides and videos that will help you and your team to learn and embed a new MIS system. It also has a dedicated section to help with your implementation '[Moving to Arbor for Manual Migration Schools](#)'.

### **Arbor Support Team/Accredited Arbor Support Partner**

If you have any 'how do I' questions, the Arbor Support Team or your Arbor Support Partner will be happy to help! Get in touch with Arbor support using one of the methods [here](#), or you Arbor Support Partner directly.

### **Customer Education Team (Training Team)**

Along the way, you will also meet members of our Customer Education Team, many have worked in schools previously and are highly knowledgeable of Arbor. To get the most out of your training, live sessions are a really great opportunity to ask questions and benefit from their unique perspective.

### **Account Manager**

Your Account Management Team will look after your commercial relationship with Arbor and can help you with any questions or queries relating to your contract or additional services.

They are your ongoing contact with Arbor once your onboarding is completed and will continue to work with you on your longer term success with Arbor.

They will check in each term once your, and make sure you have access to all the right information at the right time by keeping you up to date with upcoming Arbor events, news and everything else you need to know!

## Your School Team

We hope the guide so far has given you a good overview of the work involved in the manual migration process to ensure a successful Arbor implementation. We would therefore recommend that you start planning in advance by gathering your school team together, especially those that will be helping you throughout the project to start sharing key information with them (such as this document and the dedicated section in the Help Centre)

We would recommend having the following team members involved:

## Your School Team

### **Project Lead**

Knowledgeable of your school's processes and workflows to ensure onboarding remains on track, leading the school team. This person should have a good understanding of the current system and how the data can be obtained. They will be the main person involved in the setup of your blank Arbor site and complete the site setup training, and co-ordinate the other staff members helping out during onboarding.

### **IT/Data Lead**

Can help manage integrations with third-party applications and supporting the project lead with data transfer tasks. The Data Lead should have the ability to efficiently manipulate data using a variety of tools that will include data import and export (**applies to Project Lead when they are covering both roles**).

### **Arbor Champions**



Involved with helping gather your data and attending training. Subject area expertise, ability to customise Arbor as required and act as an Arbor advocate with new users (can advocate different areas - attendance, behavior, etc).

### **Change Controller**

Responsible for updating any changes with data in your current system and in the Entity Importer Templates/Arbor throughout the first 6 weeks of your onboarding journey before you go live in Week 7 - to ensure no data is missed and all data is updated accordingly during transfer (can be project lead too).

### **How To Manage Change**

In preparation to feel ready for the change of moving to Arbor see our handy guide here:

**[How To Manage Change When Moving To Arbor](#)**

### **Top Tips & FAQ's**

Please take a look at our guide on **[Manual Migration FAQ's](#)** which will hopefully cover any questions you may have about the process. If there is anything on the Help Centre that doesn't cover what you are looking for before you start your onboarding, please contact your Account Manager.

