Partner Admin Permissions
How To

Guidance on the tasks available with the new Admin Permissions and how to set up access

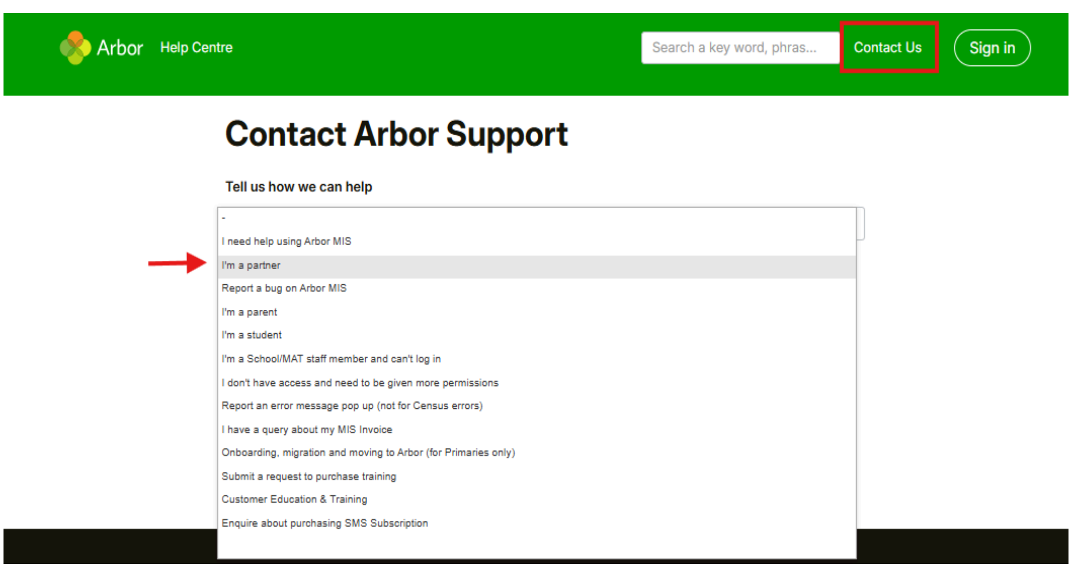
Arbor

Version	Date	Updates
1	25/6/2021	-
2	18/2/2025	- Process revision and update to contacts

Produced by Arbor Education Partners Ltd. for use with Arbor School MIS.

Please check our Help Centre to ensure you are using the most up to date manual possible.

If your MIS is not behaving as expected and you can’t find a solution in the Help Centre, please don’t hesitate to contact the Partner Support Team by clicking Contact Us at the top of the Help Centre and, from the drop down, selecting ‘I’m a partner’.



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Arbor Admin Permissions

As we start to roll out the availability of Arbor Admin privileges on school sites we have put together this guide on the available permissions and actions, what they allow you to do and how to use them.

To have Arbor Admin permissions activated on your supported school site, you will need to make sure you have the correct data sharing agreements in place with the school that allows you to access their data and make changes to their school site independently.

Setting up the Arbor Admin Privileges

Once you have secured the agreement with the school to have Admin access to their school site you will need to let us know by following the steps below so we can activate the access.

Setting up Access

1. Email the school providing them with the following details, using the following template School Email:
    - School Name
    - School URL
    - Name of team members needing to have access and their email addresses.
    - Request authority to those named within the email to have Arbor Admin access to their school MIS.

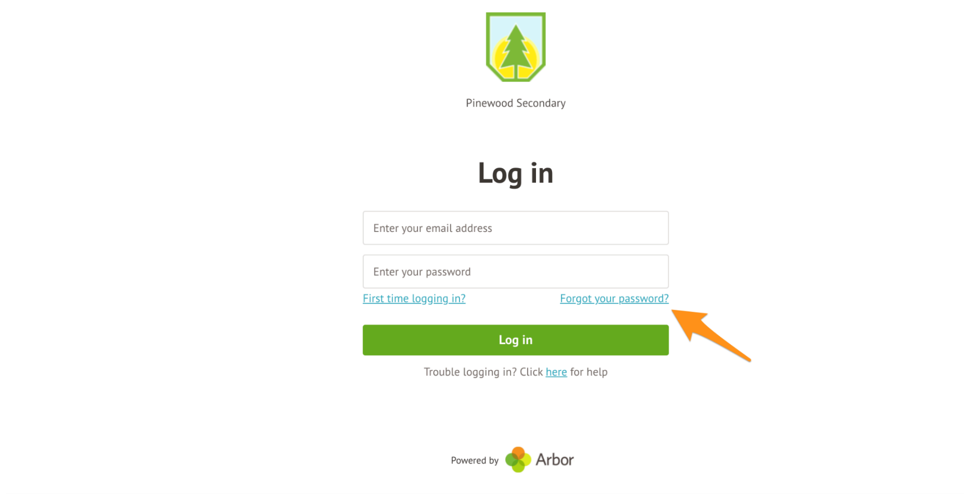
2. It is the Partners responsibility to then forward the email to Arbor in the form of a support ticket with approval from the **Headteacher** or **CEO** (if MAT contract). You MUST include written confirmation that you have the necessary data sharing agreement in place with the school that permits you to access and modify the school's data and make independent changes to their Arbor system.

3. All members of the team must use their own email address to register (not a generic email address ie s.smith@business.com not helpdesk@business.com). This is to ensure GDPR compliance.

4. We will notify you once access has been set up and is live. Please allow 2 business days for access for this to take place. The setup *does not* create the user as a member of staff. To login for the first time, you will need to follow the steps below.

Logging In as Arbor Admin

To log in as Arbor Admin for the first time, you will need to reset your password using the forgotten password link on the login page.

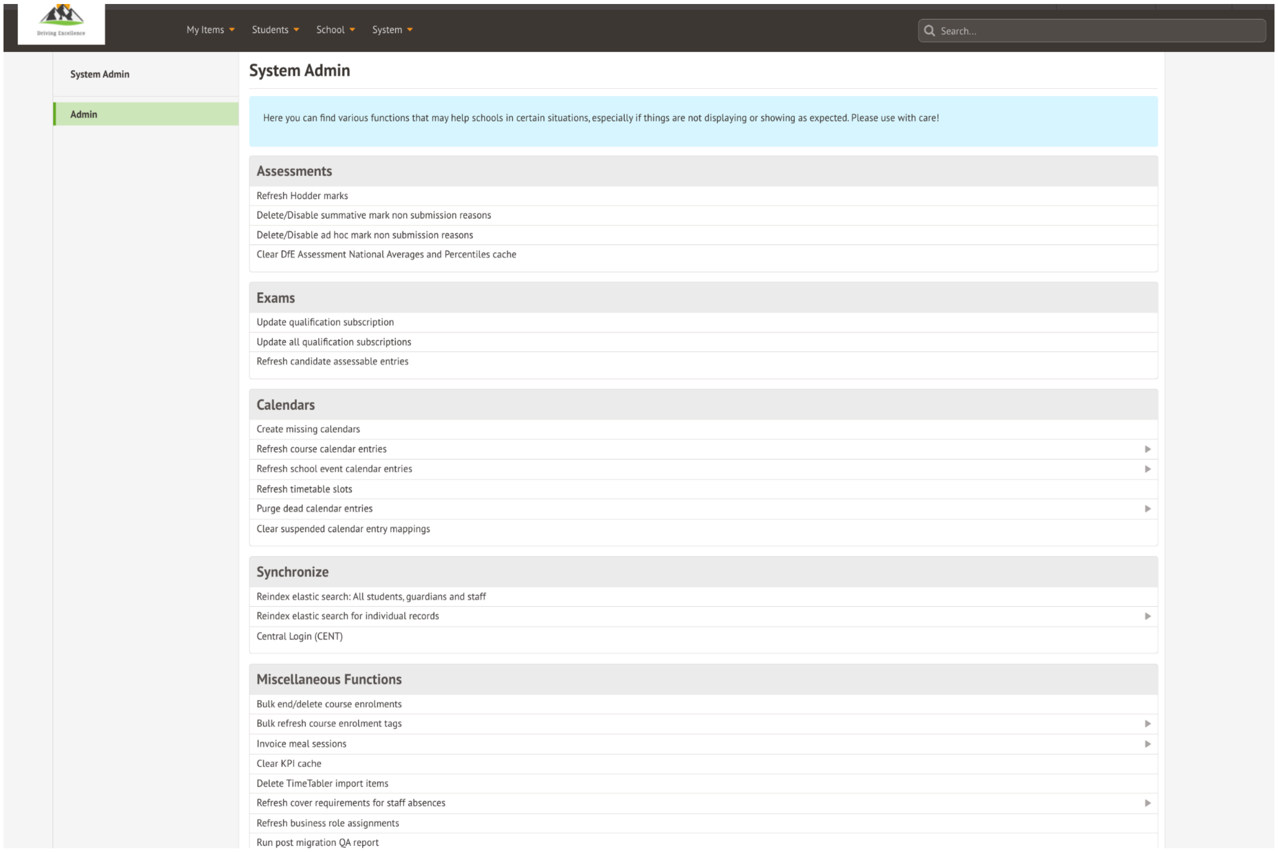


This will send a link to the administrator's email address to reset the password and once this is completed the user can log in.

Logging In

Once you are set up as an Arbor Admin on a school site you will have a different landing page when you log onto the school MIS.

The page that you are taken to after logging in will look like the screenshot below.



My Items
Students
School
System
Search...
System Admin
Admin
System Admin
Here you can find various functions that may help schools in certain situations, especially if things are not displaying or showing as expected. Please use with care!
Assessments
Refresh Hodder marks
Delete/Disable summative mark non submission reasons
Delete/Disable ad hoc mark non submission reasons
Clear DfE Assessment National Averages and Percentiles cache
Exams
Update qualification subscription
Update all qualification subscriptions
Refresh candidate assessable entries
Calendars
Create missing calendars
Refresh course calendar entries
Refresh school event calendar entries
Refresh timetable slots
Purge dead calendar entries
Clear suspended calendar entry mappings
Synchronize
Reindex elastic search: All students, guardians and staff
Reindex elastic search for individual records
Central Login (CENT)
Miscellaneous Functions
Bulk end/delete course enrolments
Bulk refresh course enrolment tags
Invoice meal sessions
Clear KPI cache
Delete TimeTabler import items
Refresh cover requirements for staff absences
Refresh business role assignments
Run post migration QA report

Available Actions for Arbor Admin

Available Functions from the landing page

Your administrative access as a partner now includes the functions listed below. You are responsible for informing the school of this enhanced access and the specific functions you can perform once access is set up.

Refresh Course & School Event Calendar Entries

What: This function allows you to refresh calendar entries on the school site.

When to use it: If a school has issues with lessons not appearing on a student or staff members calendar. The first step would be to try refreshing the individual lesson. If this does not work then this function allows you to refresh the calendar entries across the whole site.

NB. Please note that this can only be actioned **after 3pm** on a school day.

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Purge dead calendar entries

What: If there are entries appearing on a calendar in error (ie after a deletion).

When to use it: This function can be used to purge dead calendar entries (after waiting for the normal refresh period). This function can be run at any time of the day, however please avoid attendance periods during the day.

Reindex search

What: There may be instances when deleted profiles are still appearing in the search bar.

When to use it: This function can be used to reindex the search bar. It can be run anytime of day, however please avoid attendance periods during the day.
It will also remove deleted records from the index.

Bulk refresh course enrolment tags

What: This tool will allow you to refresh Academic Unit Enrolment (course enrolment) tags for a given set of students.

When to use it: Please note that the functionality can only be used for 10 students at a time.

Invoice Meal Sessions

What: This will invoice meal sessions for a selected date range.

When to use it: If a school has issues with meal invoices not appearing for a specific date range.

Refresh cover requirements for staff absences

What: This will refresh the cover requirements for all staff absences in the selected date range.

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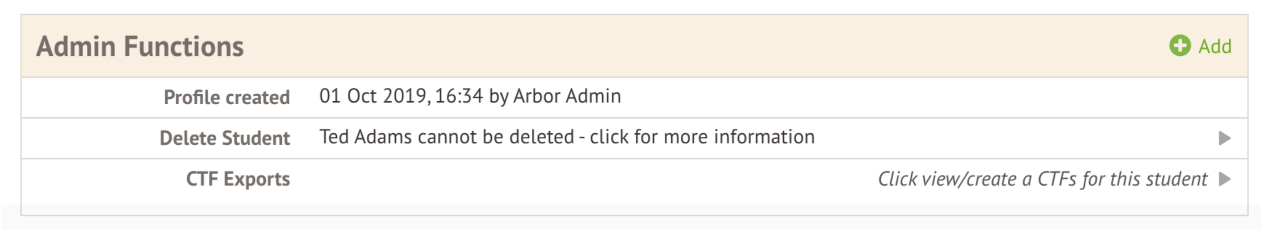
Arbor Admin Actions Throughout the MIS

Within this section we will go through the additional actions that will be available to you when you are logged in as a Support Partner Admin.

Student Profile

What: Arbor Admin provides access to the Admin Functions box at the very bottom of a student profile page.



When to use it: This function allows you to delete a student (however please note, if they have attendance marks then the system will NOT allow the student to be deleted) and create and view CTF’s directly from the student profile.

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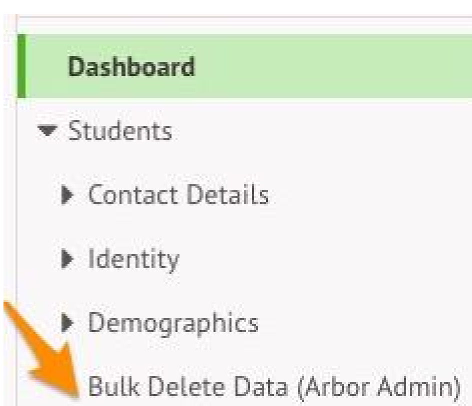
Visibility of CRW Permissions via School> Users & Security

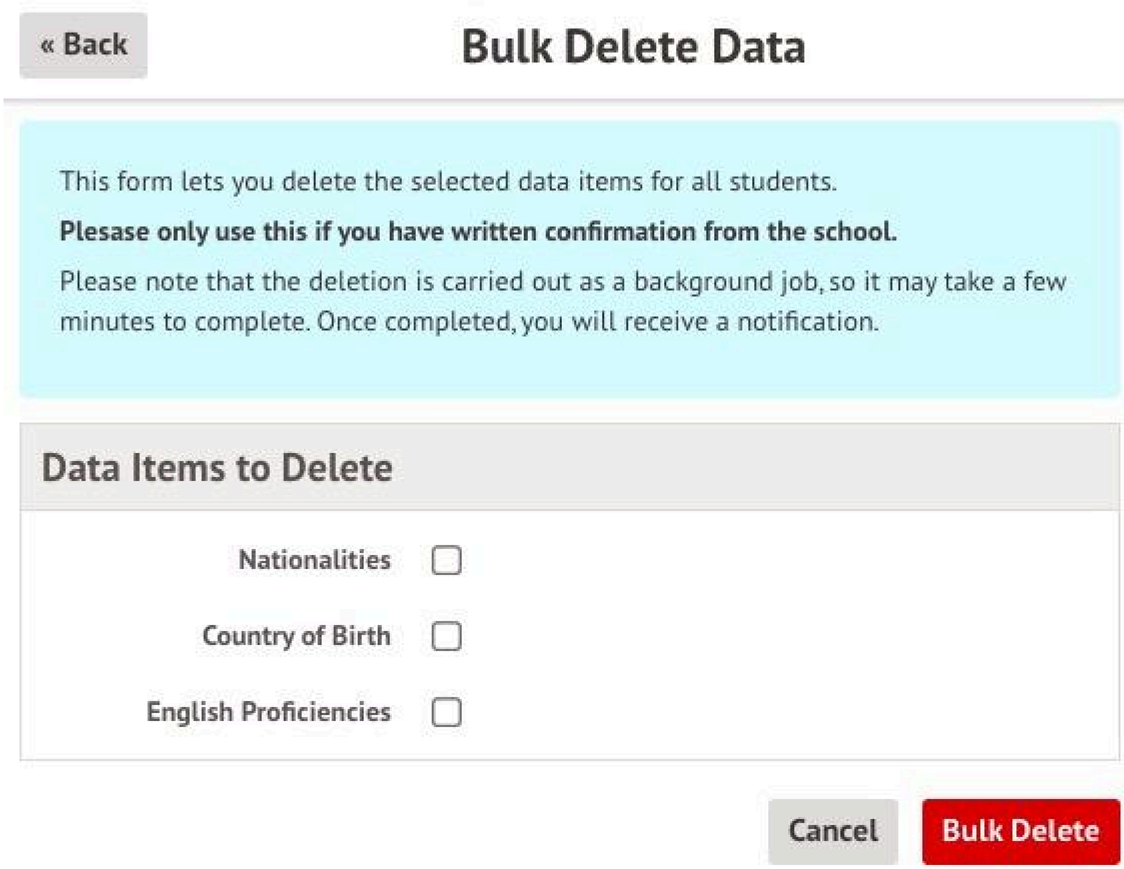
What: Under Access Control you will see CRW Field Permission is now visible.
When to use it: Clicking on this link takes you to a page where you can view the grid that lists the permissions for each Custom Report Writer Field.

Bulk Delete Demographic Data via School> Data> Data Quality Dashboard

What: Via School>Data>Data Quality Dashboard, select Students from the left-hand menu and this will expand to give you the options shown below. The option of Bulk Delete Data (Arbor Admin) is now available to you.



When to use it: The Bulk Delete Data option allows for the removal of data relating to Country of Birth, Nationality and English Proficiency. The DfE has instructed that schools should only store this information if they have a reason to do so (not for census purposes). This slideover allows for this data to be deleted quickly. Just tick the appropriate boxes and click 'Bulk Delete'.



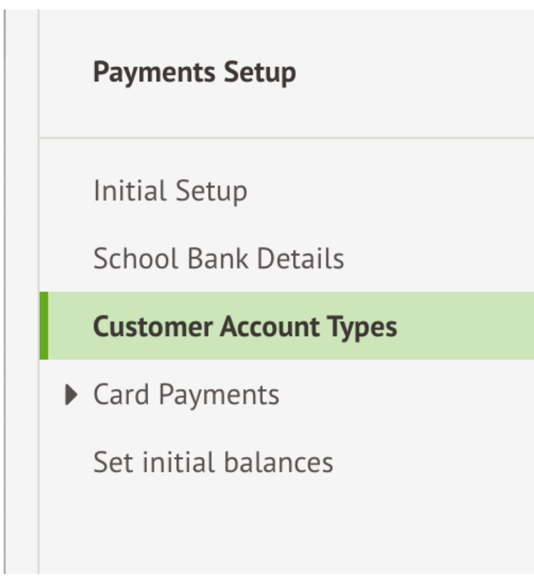
However this should ONLY be used with written consent from the school to delete this information.

Create Missing Payment Accounts

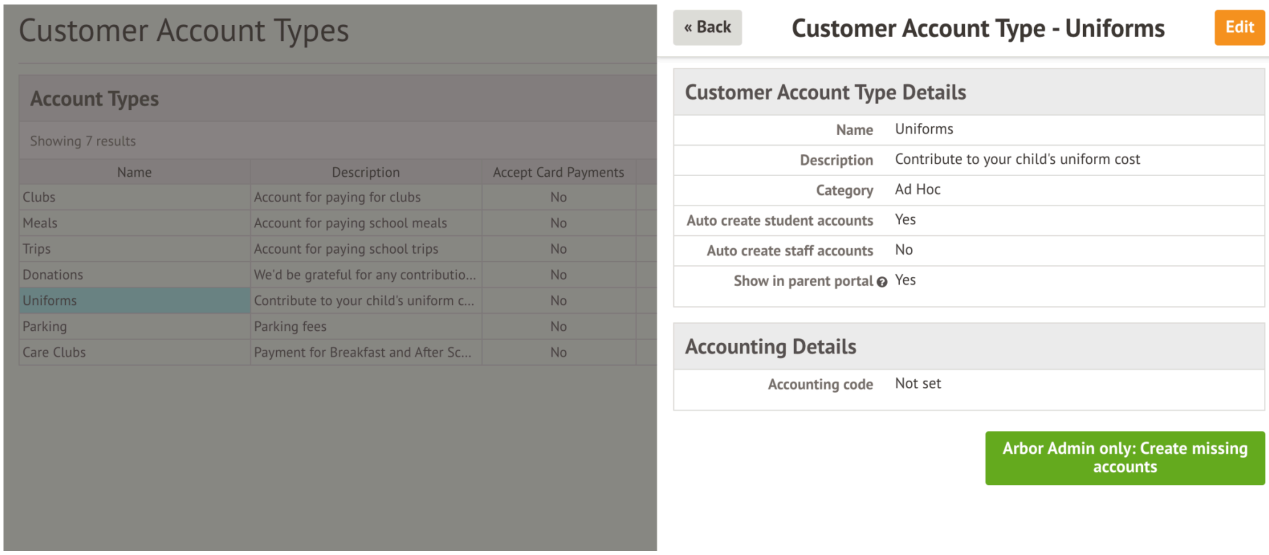
What: You can now refresh Payment Accounts via School> Payments> Set Up

When to use it: Schools sometimes set up new Customer Account Types, but do not tick 'auto-create student/staff accounts', resulting in no accounts being created. If they tick these options subsequently, it will not retrospectively create the accounts. This button re-runs the account creation process and sets up the 'missing' student and/or staff accounts.

Via School>Payments>SetUp, select Customer Account Types from the left-hand menu.



From the Account Types listed select the one that you want to refresh and create the missing accounts for (in my example I have selected Uniforms).



In the slide-over you need to click on the green Arbor Admin button to create the missing accounts.

Logging in as a Parent/Guardian

What: Arbor Admin allows you to log in as a parent (but not a staff member).

When to use it: To login as a guardian, go to the guardian's profile, scroll down to **User Details**. Click into the Username and select Log in to Parent Portal as guardian.

Please note that any actions carried out while signed in as the user will be actioned by the account, this is used predominantly to see what a user has experienced on their site.

When signing in as a guardian it is advised to not enter a Date of Birth for the security check as this can only be done once.

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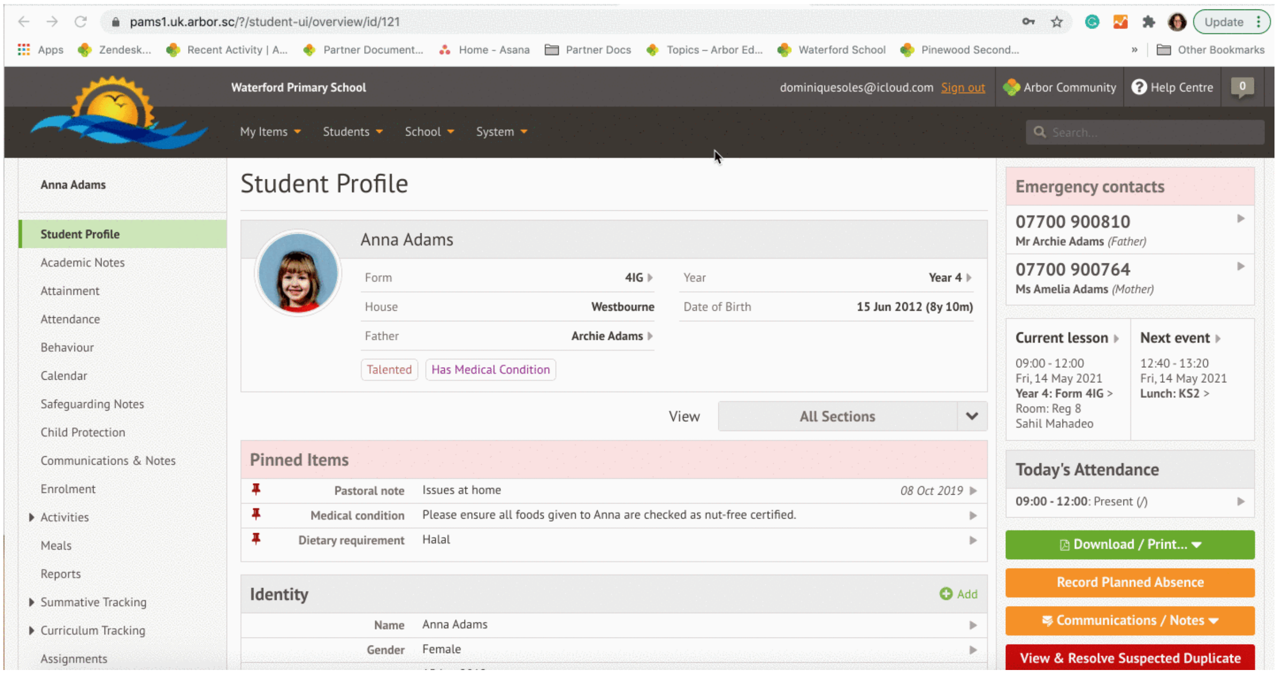
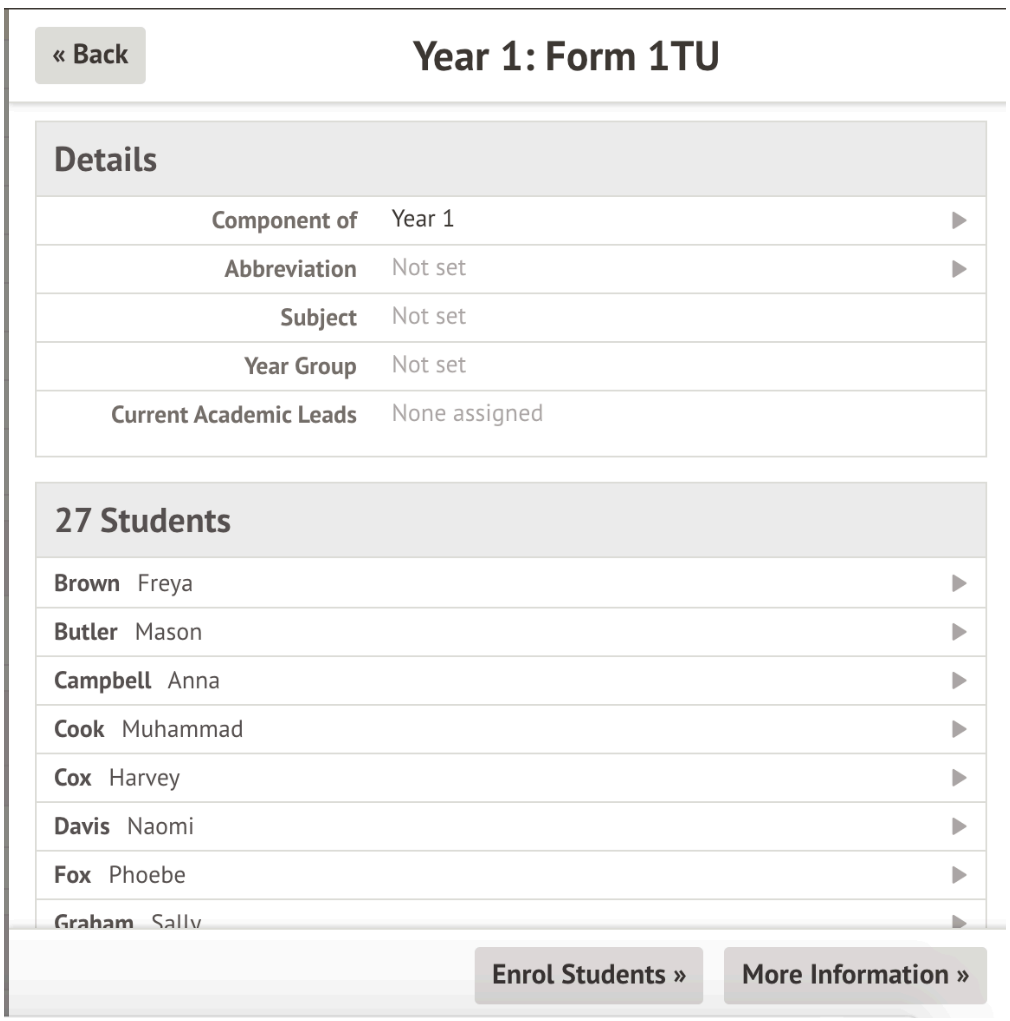

pams1.uk.arbor.sc/?/student-ui/overview/id/121
Apps
Zendesk...
Recent Activity | A...
Partner Document...
Home - Asana
Partner Docs
Topics – Arbor Ed...
Waterford School
Pinewood Second...
Other Bookmarks
Update
Waterford Primary School
dominiquesoles@icloud.com
Sign out
Arbor Community
Help Centre
My Items
Students
School
System
Search...
Anna Adams
Student Profile
Academic Notes
Attainment
Attendance
Behaviour
Calendar
Safeguarding Notes
Child Protection
Communications & Notes
Enrolment
Activities
Meals
Reports
Summative Tracking
Curriculum Tracking
Assignments
Student Profile
Anna Adams
Form 4IG
Year Year 4
House Westbourne
Date of Birth 15 Jun 2012 (8y 10m)
Father Archie Adams
Talented
Has Medical Condition
View
All Sections
Pinned Items
Pastoral note Issues at home 08 Oct 2019
Medical condition Please ensure all foods given to Anna are checked as nut-free certified.
Dietary requirement Halal
Identity
Add
Name Anna Adams
Gender Female
Emergency contacts
07700 900810
Mr Archie Adams (Father)
07700 900764
Ms Amelia Adams (Mother)
Current lesson
09:00 - 12:00
Fri, 14 May 2021
Year 4: Form 4IG >
Room: Reg 8
Sahil Mahadeo
Next event
12:40 - 13:20
Fri, 14 May 2021
Lunch: KS2 >
Today's Attendance
09:00 - 12:00: Present (/)
Download / Print...
Record Planned Absence
Communications / Notes
View & Resolve Suspected Duplicate

Refresh a Timetable Slot

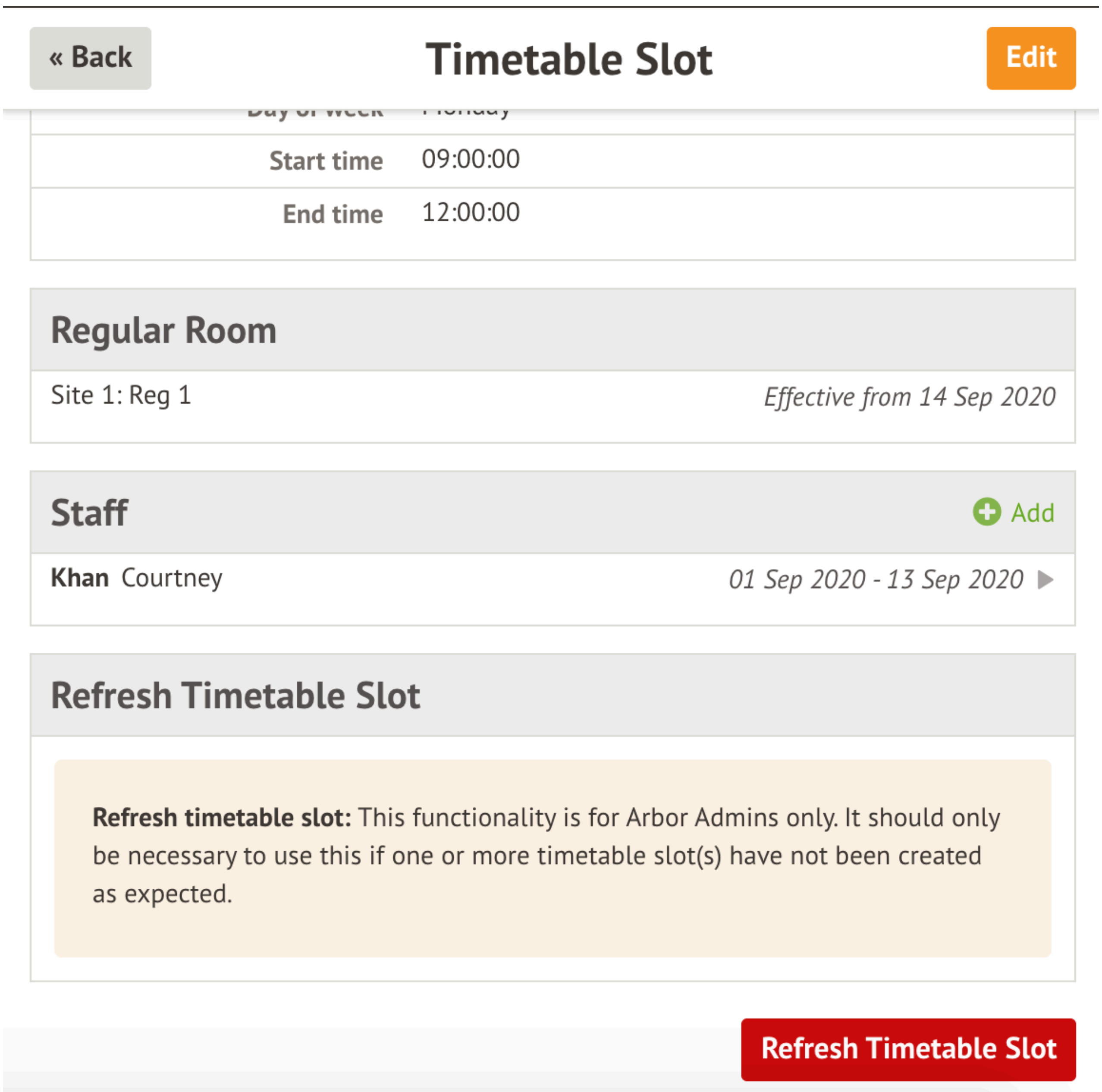
What: The option to refresh timetable slots is now available to you
When to use it: When a school has reported that a timetable slot is not rescheduling and seems 'stuck' or that a lesson is not appearing in a staff member's calendar who is the teacher of the class - You can click into the timetable slot and 'Refresh Timetable Slot'. This will refresh the Calendar Entry Mapping, pulling it into the staff timetable. It can also resolve rescheduling.

To do this go to School> Programmes> Select the Year> Select the Course> Select the lesson> In the slide over click on the 'More Information' button.



Scroll down to the Classes and Lesson section and select the session that isn't appearing on the timetable.

Eg Monday 9.00am and a slide over will appear. At the bottom of the slide-over you will see a red Refresh Timetable button.



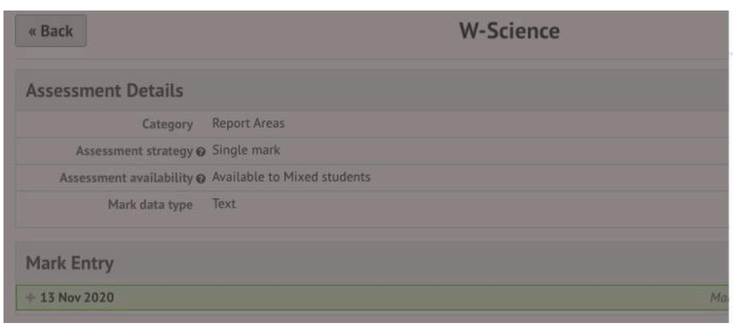
Assessment Refresh

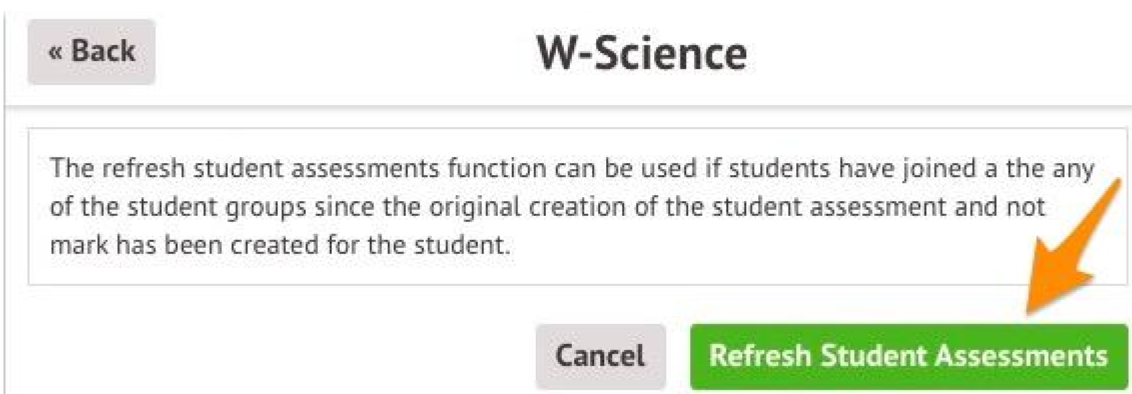
Ad-Hoc Assessment Refresh

What: Ad-hoc assessment refresh is now available via Students > Assessments > Annual Policy > Manage Assessments

When to use it: This should be used if a school has greyed-out ad-hoc assessments for students that definitely meet the criteria for the ad-hoc that has been set up (e.g. in the appropriate course in the assessment period, or part of an appropriate Year Group).

To run the refresh: Head to Students > Assessments > Annual Policy > Manage Assessments, then click into the Ad-Hoc assessment (if this is linked to a summative assessment, you may need to click the + button next to the summative assessment to make it visible).





Click on the desired assessment period under Mark Entry, then click the orange Refresh button on the slideover. This will explain the refresh operation. You can repeat the process for the other assessment periods if needed. If the ad-hoc assessment has been set up on a per-course basis, you'll only need to refresh on one 'version' of the ad-hoc (e.g. linked to an English assessment/course) - the refresh will be applied to all other versions too.

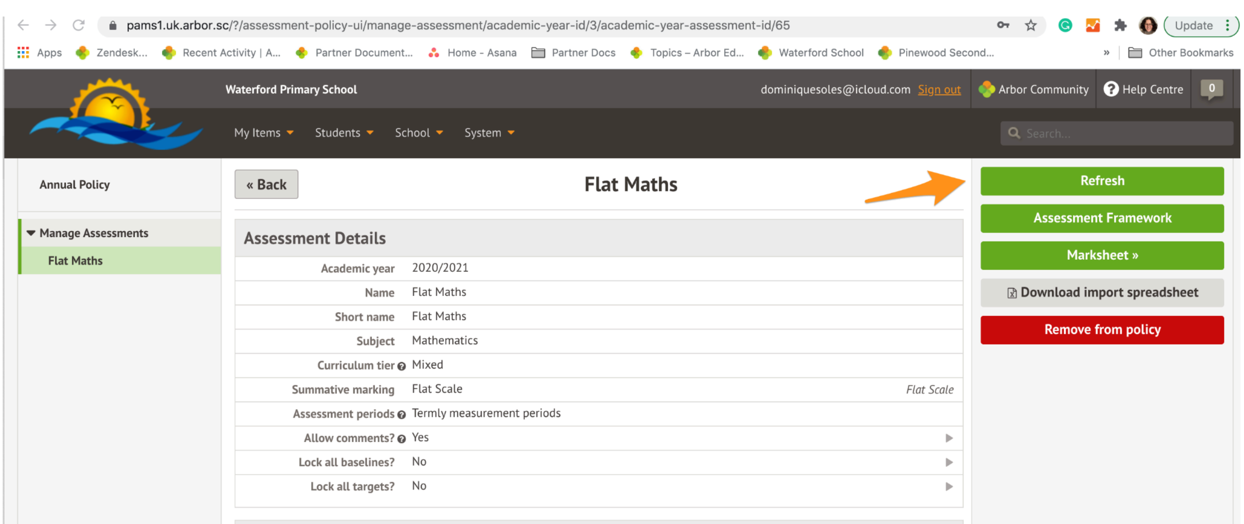
Summative Assessment Refresh

What: Summative assessment refresh is now available via Students > Assessments > Annual Policy > Manage Assessments

When to use it: This should be used if a school has greyed-out assessment marks for a Summative Assessment. This sometimes happens if students join mid-year, or if a lot of enrolment changes are made.

To run the fresh head to Students > Assessments > Annual Policy > Manage Assessments and click into the desired summative assessment.

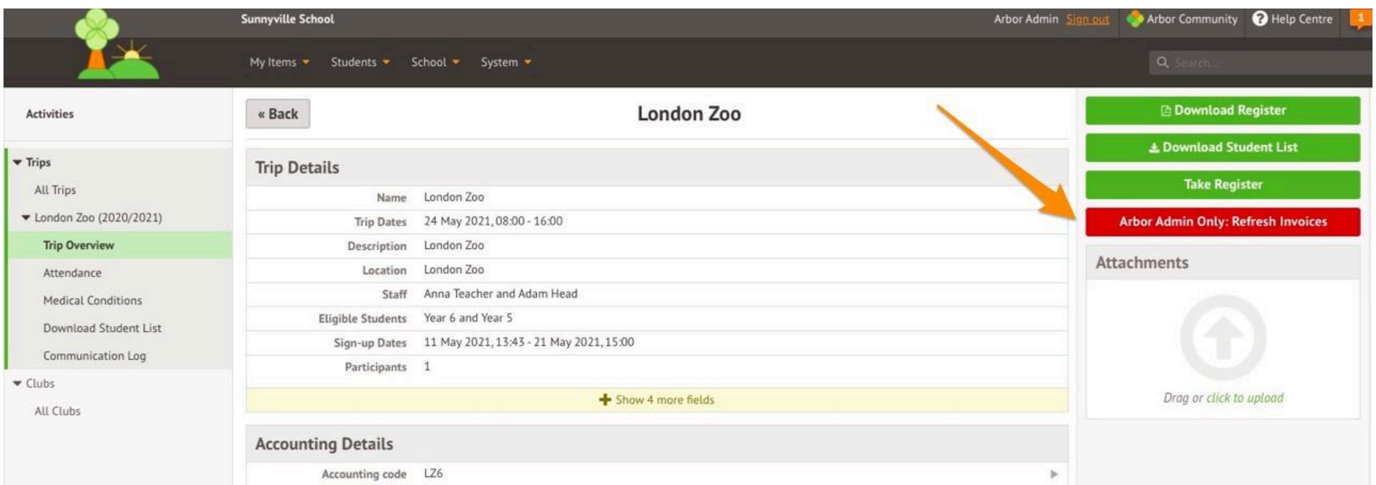
The 'Refresh' button will be in the top right. Click this to start the refresh operation - this may take a couple of minutes to complete, and the assessment will show as 'Summative setup in progress' on the Manage Assessments page whilst this is ongoing.



Refresh Invoices

What: The ability to refresh previously generated invoices.
When to use it: There may be times when a school will need to alter the price of a trip and have invoices that have been previously generated. These invoices will need to be refreshed. The Refresh Invoice option will change the price on invoices accordingly.

To run the refresh head to School > Activities > Trips > Click into required Trip > on the right-hand side there is a button Arbor Admin Only: Refresh Invoices.



Audit Log Tool

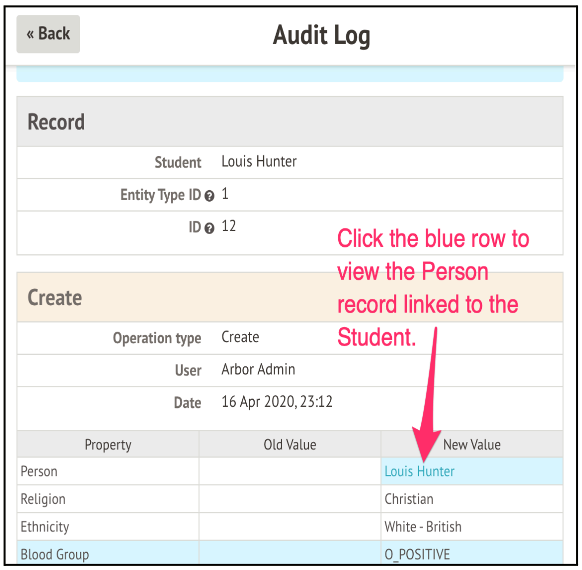
What: The Audit log tool allows you to query specific records in the school's database.
When to use it: You will now have the ability to track changes in records, such as updates or deletions and it enables you to get answers for schools to let them know who has made changes and when they were carried out.

Performing an Audit

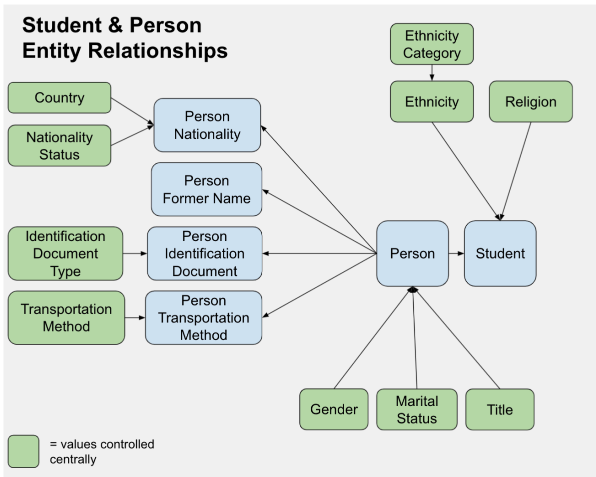
You can access the audit log tool via System>Basic Arbor Setup>Audit Log Tool

You will need:

- Entity Type - the type of record your want to audit (e.g. Student, Staff, Registration Form)
- [ID](#) - the ID number for the record you are auditing.



Once you've entered the entity type and ID, the Audit Log will provide you with the results. Please note that some data may not be stored directly against the record you are looking at - e.g. a Student's first/last name is stored against a **Person** record - you can click through to this after auditing the Student.
Student and Person entity relationships can be seen below:



Things to be aware of when auditing

- It is not currently possible to audit deleted records, as you won't be able to get the ID number via the user interface. If you need information on a deletion, please contact Arbor.
- Whilst the Audit Log gives a user and date/time responsible for a change, it doesn't give context - users can create records indirectly (e.g. a CTF import may create an FSM record against a student profile). If you need more context for a change, please contact us and we can help provide this.
- Please contact myteam@arbor-education.com with any queries or assistance on deleted records

There is a webinar that accompanies the audit log tool.
This can be located via:
Audit Log Tool Webinar

Partner Admin Features list can also be accessed via:
https://docs.google.com/spreadsheets/d/1zGVMio9Llks9ZjBzS_TD8LLxkBvWxvX3lb_F92CrlXQ/edit#gid=0