



Partner Admin Permissions How To


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

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'.


Arbor Help Centre

Contact Us

Sign in

Contact Arbor Support

Tell us how we can help

I need help using Arbor MIS

I'm a partner

Report a bug on Arbor MIS

I'm a parent

I'm a student

I'm a School/MAT staff member and can't log in

I don't have access and need to be given more permissions

Report an error message pop up (not for Census errors)

I have a query about my MIS Invoice

Onboarding, migration and moving to Arbor (for Primaries only)

Submit a request to purchase training

Customer Education & Training

Enquire about purchasing SMS Subscription

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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

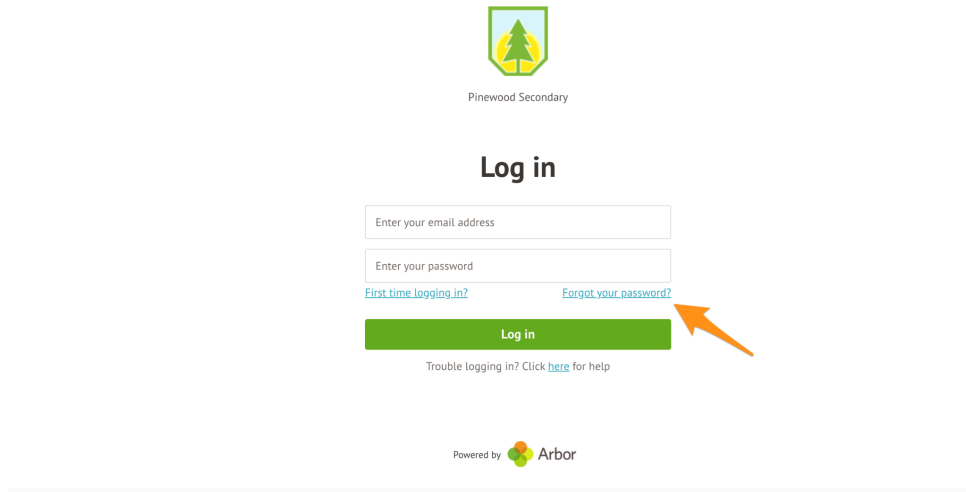
Once you have secured the agreement with the school to have Admin access to their school site you will need to let us know by following the steps below so we can activate the access.

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.



Pinewood Secondary

Log in


Enter your email address

Enter your password

[First time logging in?](#) [Forgot your password?](#)

Log in

Trouble logging in? Click [here](#) for help


Powered by  Arbor

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 ▾

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.

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 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.

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.

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.

Admin Functions		 Add
Profile created	01 Oct 2019, 16:34 by Arbor Admin	
Delete Student	Ted Adams cannot be deleted - click for more information ▶	
CTF Exports	Click view/create a CTFs for this student ▶	

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.

Visibility of CRW Permissions via School> Users & Security

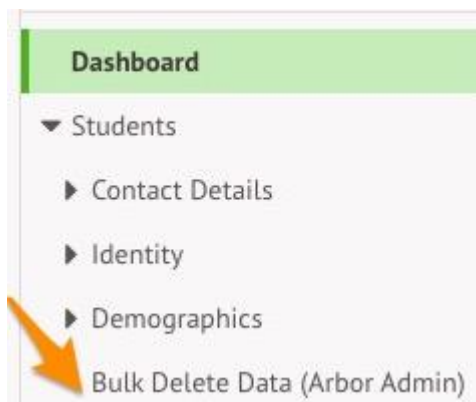


What: Under Access Control you will see CRW Field Permission is now visible.

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'.

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Bulk Delete Data

This form lets you delete the selected data items for all students.

Please only use this if you have written confirmation from the school.

Please note that the deletion is carried out as a background job, so it may take a few minutes to complete. Once completed, you will receive a notification.

Data Items to Delete

Nationalities	<input type="checkbox"/>
Country of Birth	<input type="checkbox"/>
English Proficiencies	<input type="checkbox"/>

[Cancel](#) [Bulk Delete](#)

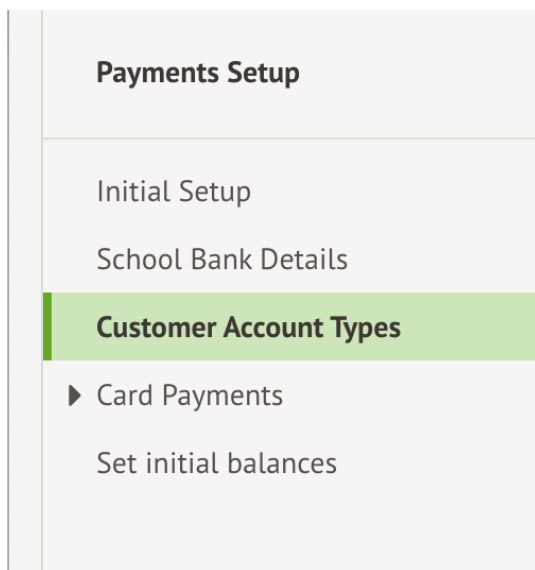
However this should ONLY be used with written consent from the school to delete this information.

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).

Customer Account Types

Account Types

Showing 7 results

Name	Description	Accept Card Payments
Clubs	Account for paying for clubs	No
Meals	Account for paying school meals	No
Trips	Account for paying school trips	No
Donations	We'd be grateful for any contributio...	No
Uniforms	Contribute to your child's uniform c...	No
Parking	Parking fees	No
Care Clubs	Payment for Breakfast and After Sc...	No

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Customer Account Type - Uniforms

Edit

Customer Account Type Details

Name	Uniforms
Description	Contribute to your child's uniform cost
Category	Ad Hoc
Auto create student accounts	Yes
Auto create staff accounts	No
Show in parent portal	Yes

Accounting Details

Accounting code	Not set
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Arbor Admin only: Create missing accounts

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.

Waterford Primary School

My Items ▾ Students ▾ School ▾ System ▾

Search...

Anna Adams

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.

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Year 1: Form 1TU

Details

Component of	Year 1	▶
Abbreviation	Not set	▶
Subject	Not set	
Year Group	Not set	
Current Academic Leads	None assigned	

27 Students

Brown Freya	▶
Butler Mason	▶
Campbell Anna	▶
Cook Muhammad	▶
Cox Harvey	▶
Davis Naomi	▶
Fox Phoebe	▶
Graham Sally	▶

[Enrol Students »](#)
[More Information »](#)

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.

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Timetable Slot

Edit

Day of week	Monday
Start time	09:00:00
End time	12:00:00

Regular Room

Site 1: Reg 1

Effective from 14 Sep 2020

Staff

+

Add

Khan Courtney

01 Sep 2020 - 13 Sep 2020 ▶

Refresh Timetable Slot

Refresh timetable slot: This functionality is for Arbor Admins only. It should only be necessary to use this if one or more timetable slot(s) have not been created as expected.

Refresh Timetable Slot

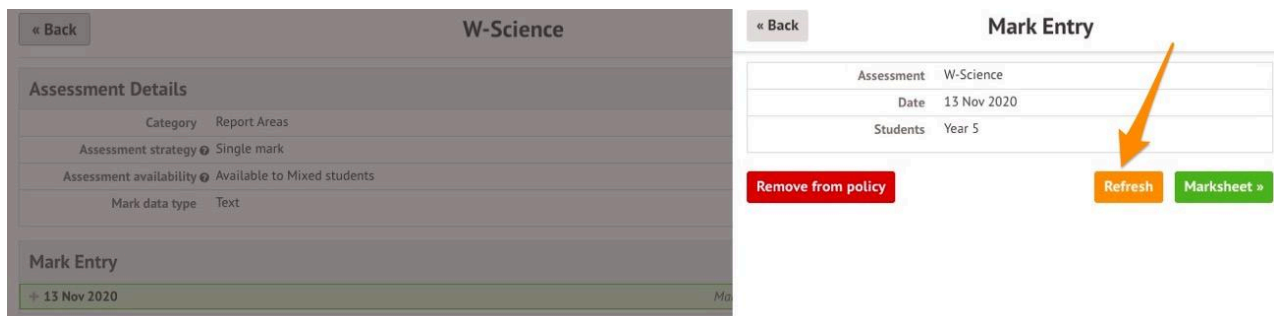
Assessment Refresh

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).



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W-Science

Assessment Details

Category	Report Areas
Assessment strategy	Single mark
Assessment availability	Available to Mixed students
Mark data type	Text

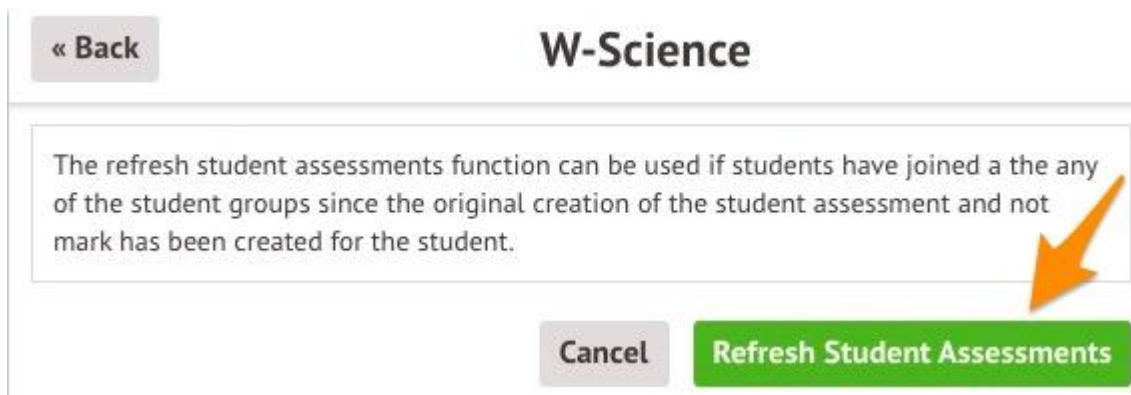
Mark Entry

Assessment	W-Science
Date	13 Nov 2020
Students	Year 5

Remove from policy

Refresh

Marksheet »



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W-Science

The refresh student assessments function can be used if students have joined a the any of the student groups since the original creation of the student assessment and not mark has been created for the student.

Cancel

Refresh Student Assessments

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.

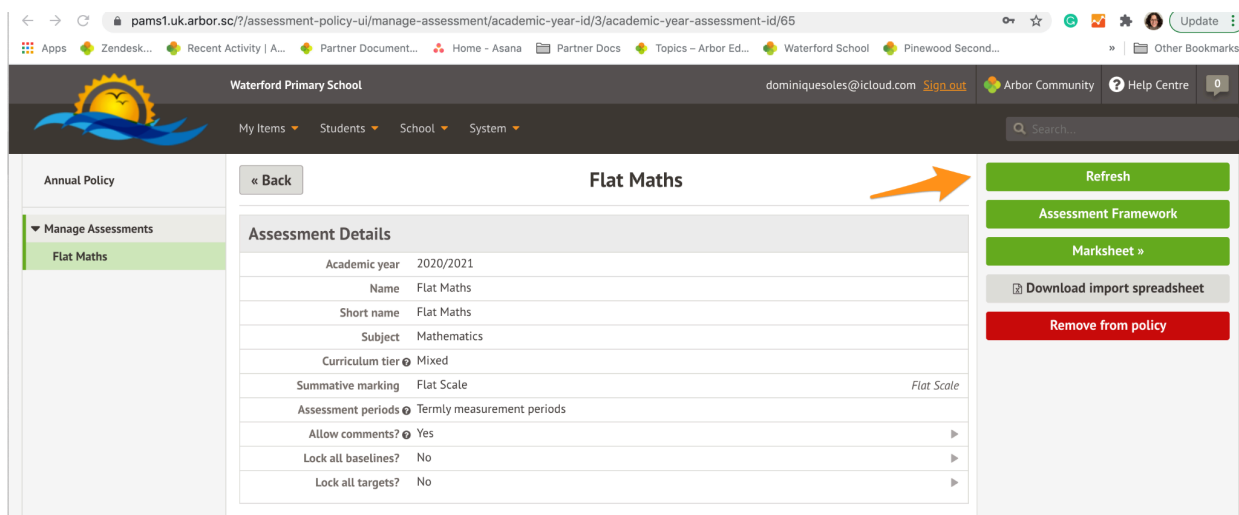
Summative Assessment Refresh

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 refresh 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.



The screenshot shows the Arbor system interface for 'Waterford Primary School'. The user is logged in as 'dominiquesoles@icloud.com'. The navigation bar includes 'My Items', 'Students', 'School', and 'System'. The sidebar on the left shows 'Annual Policy' and 'Manage Assessments' with 'Flat Maths' selected. The main content area displays 'Assessment Details' for 'Flat Maths' with the following information:

Assessment Details	
Academic year	2020/2021
Name	Flat Maths
Short name	Flat Maths
Subject	Mathematics
Curriculum tier	Mixed
Summative marking	Flat Scale <i>Flat Scale</i>
Assessment periods	Termly measurement periods
Allow comments?	Yes
Lock all baselines?	No
Lock all targets?	No

On the right side, the toolbar contains the following buttons:

- Refresh (green button)
- Assessment Framework (green button)
- Marksheet » (green button)
- Download import spreadsheet (grey button)
- Remove from policy (red button)

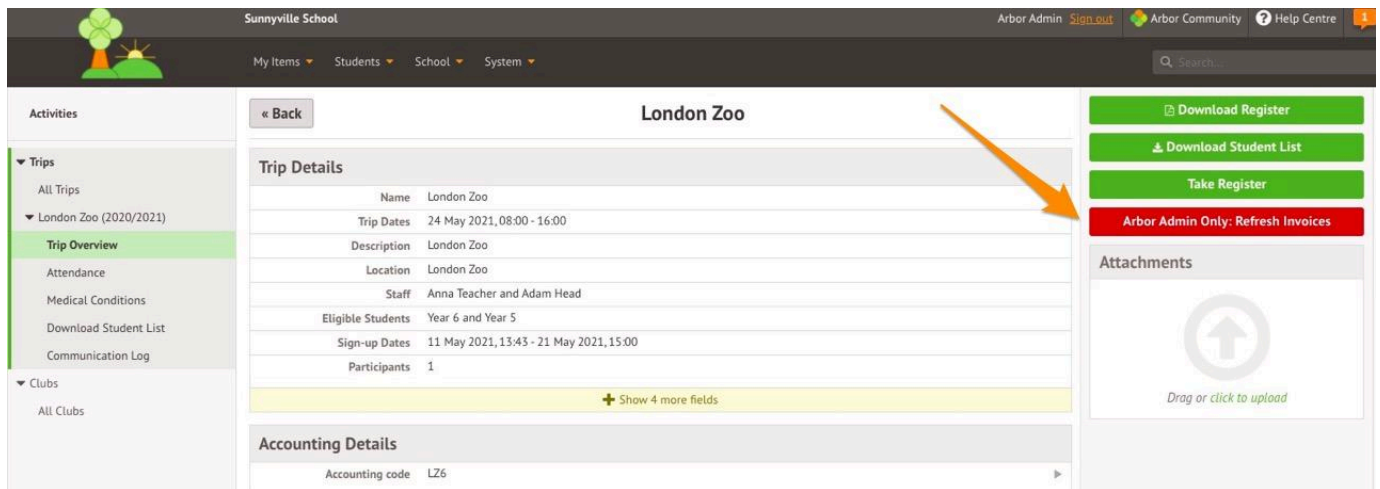
An orange arrow points to the 'Refresh' button.

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.



The screenshot shows the Arbor Admin interface for Sunnyville School. The left sidebar contains a menu with 'Activities' expanded, showing 'Trips' and 'Clubs'. Under 'Trips', 'London Zoo (2020/2021)' is selected, and 'Trip Overview' is highlighted. The main content area displays the 'London Zoo' trip details, including trip dates, description, location, staff, eligible students, sign-up dates, and participants. On the right-hand side, there are several buttons: 'Download Register', 'Download Student List', 'Take Register', and 'Arbor Admin Only: Refresh Invoices'. An orange arrow points to the 'Arbor Admin Only: Refresh Invoices' button. Below these buttons is an 'Attachments' section with a circular arrow icon and the text 'Drag or click to upload'.

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

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Audit Log

Record

Student	Louis Hunter
Entity Type ID	1
ID	12

Create

Operation type	Create
User	Arbor Admin
Date	16 Apr 2020, 23:12

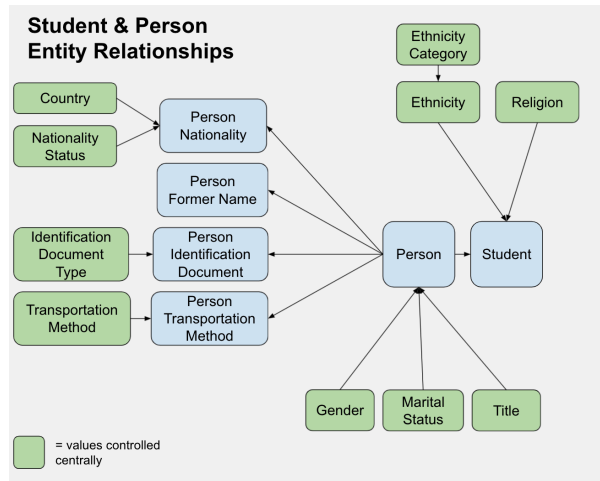
Property	Old Value	New Value
Person		Louis Hunter
Religion		Christian
Ethnicity		White - British
Blood Group		O_POSITIVE

Click the blue row to view the Person record linked to the Student.



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_F92CrIXQ/edit#gid=0