



Welcome to Arbor
New site creation
Getting ready for
day one!



Version	Date	Updates
2	29/04/20	First release

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 cannot
find a solution in the help centre, please don't hesitate to
contact myteam@arbor-education.com for assistance
from your support team.

Contents

Introduction	4
Before you start...	4
Creating Academic Years	5
Creating Year Groups	7
Creating Registration Form Groups	9
Creating an Applicant Intake	12
Import Student CTF's	13
Resolving In Year Admissions	16
Assign Year Groups, Registration Forms and Enrolling	19
Off roll current academic year leavers	22
Defining Roll Call times	26
Creating your next academic year	28
Step 1 - Create your Academic Year	29
Check you've set up your calendar correctly	33
Step 2 - Off - Roll Leavers	34
Generating CTFs for your leavers	38
Step 3 - Year Groups & Registration Forms	41
Copy year groups and registration forms	42
Adding additional year groups or registration forms	42
Assign tutors to year groups and registration forms	43
Promote year group students	46
Enrol Applicants	47
Review and tweak year group enrolments	50
Promote registration form students	51
Review and tweak registration form enrolments	52



Resolving students without an enrolment	53
Enrolling attending students	54
Removing students who will not be attending	55
Make sure your students will be in the right year	56
Step 4 - Custom Groups	57
Step 5 - Houses	57
Step 6 - Courses & Classes	59
Adding additional classes	65
Make sure you have registers for your first day back	68
Step 7 - Meals	72
Step 8 - Interventions	72
Review School Year Setup	72
Adding important information to Arbor	74
Additional Student Information	74
Medical Information	75
Dietary Information	75
SEN Status	76
SEN Needs	76
Additional Staff Information	77
Staff Medical Information	77
Staff - Next of Kin	78
Guardian Contact Information	79
Guardian Contact Information	79
Student Guardian Relationship Information	80
Data Quality Dashboard	80
Need any more help?	81

Introduction

The aim of this guide is to get ready for day one on Arbor, we've structured this process to make it as easy as possible. You will first create your current academic years data and enrolments. After that you will then be able to follow our tried and tested method for creating a New Academic Year so that you are ready to go live from September.

Each of the sections in this guide will have several steps, please make sure you complete each section **in order**.

Before you start...

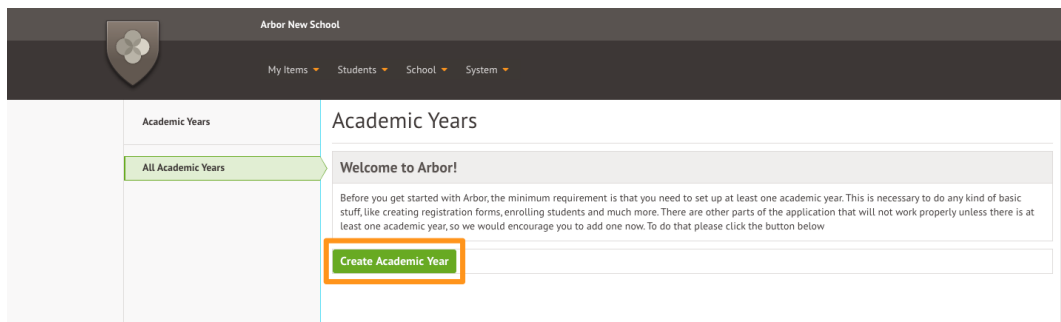
Before you start the new site setup please make sure you have the following:

1. CTF's split by year group
2. Can log in into your new Arbor site (Your Project Coordinator will release this to you)- [this guide](#) will explain more about logging in
3. Appropriate level of access to Arbor to set up your new site (your Project Coordinator can help here!)
4. Completed the following tabs in your workbook
 - 4. Current Academic Year Leavers
 - 5. Academic Years
 - 7. Year Groups
 - 8. Registration Forms
 - 10. Registration & Roll Call Times
 - 12. Medical & Dietary Information
 - 13. Guardian Contact Information
 - 14. Additional Staff Data
 - 15. Exclusion Data

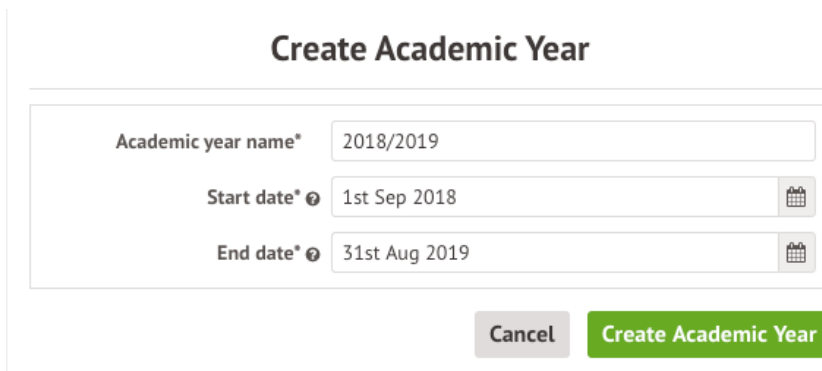
Creating Academic Years

Here you will need to create the academic years for as many years as you want to enter historic information for. Details of this can be found in your workbook in tab **.5 Academic Years**.

1. Click on the **Create Academic Year** button

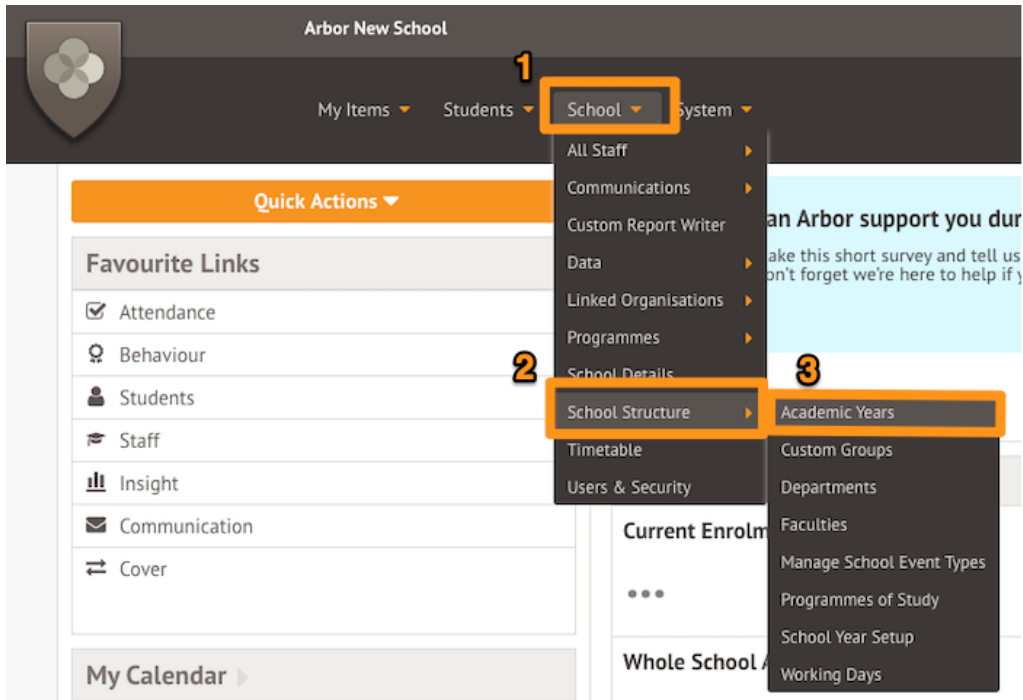


2. In the slide over enter details your earliest academic year and click on the **Create Academic Year** button.

A screenshot of the 'Create Academic Year' form. The form has a title 'Create Academic Year' and three input fields: 'Academic year name*' with the value '2018/2019', 'Start date*' with the value '1st Sep 2018' and a calendar icon, and 'End date*' with the value '31st Aug 2019' and a calendar icon. At the bottom of the form, there are two buttons: a grey 'Cancel' button and a green 'Create Academic Year' button.

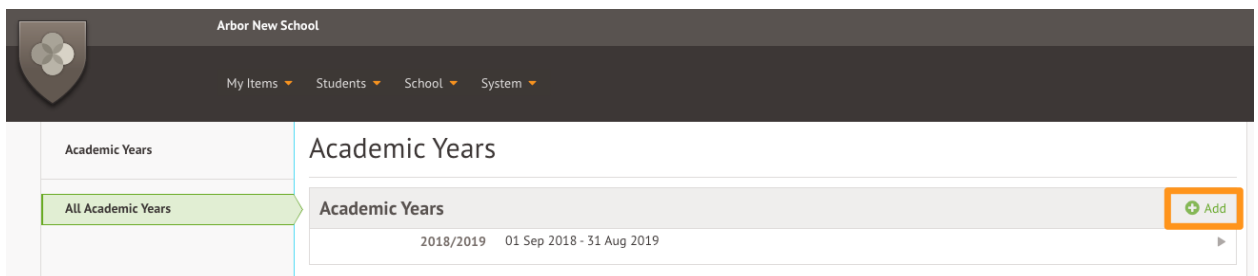
Please note if you don't start with the earliest year you won't be able to enter historical data in the future e.g. If you plan on uploading historic assessment data for years previous to 2019/2020 you will need to add additional years

- Then go to *School > School Structure > Academic Year*



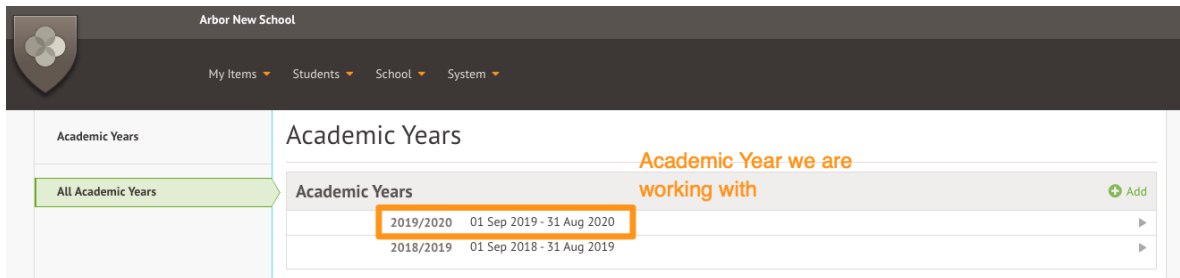
The screenshot shows the Arbor New School dashboard. The top navigation bar includes 'My Items', 'Students', 'School', and 'System'. The 'School' dropdown menu is open, showing options like 'All Staff', 'Communications', 'Custom Report Writer', 'Data', 'Linked Organisations', 'Programmes', 'School Details', 'School Structure', 'Timetable', and 'Users & Security'. The 'School Structure' option is highlighted with an orange box and a '2'. The 'Academic Years' sub-option under 'School Structure' is also highlighted with an orange box and a '3'. On the left sidebar, 'Students' is highlighted with a '2'. The 'Quick Actions' section includes 'Attendance', 'Behaviour', 'Students', 'Staff', 'Insight', 'Communication', and 'Cover'. The 'My Calendar' section is also visible.

- Click on the **Add** button and enter details for your next academic year



The screenshot shows the 'Academic Years' page in the Arbor New School interface. The top navigation bar includes 'My Items', 'Students', 'School', and 'System'. The 'Academic Years' section is active, showing a table with one entry: '2018/2019' with dates '01 Sep 2018 - 31 Aug 2019'. An 'Add' button with a green plus icon is highlighted with an orange box in the top right corner of the table.

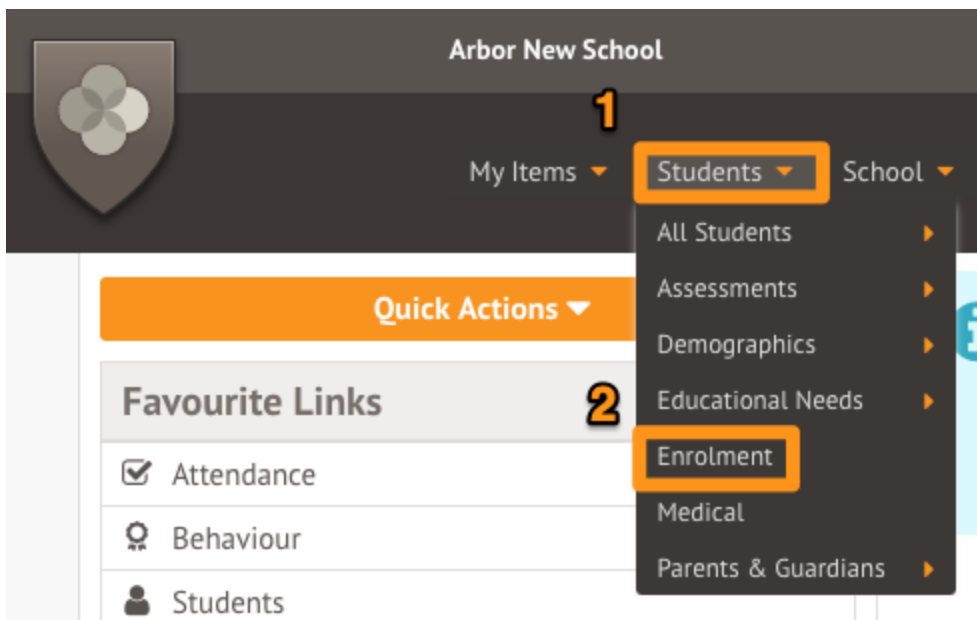
- Repeat above steps until you get to the current academic year



Creating Year Groups

Next you will need to create your year groups in Arbor. This information can be found in your workbook in tab **7. Year Groups**.

1. Go to *Students > Enrolment*



2. Click on the *Add* button

Arbor New School Screen Recording 2020-04-27 at 15.43.30.mov

My Items ▾ Students ▾ School ▾ System ▾

Enrolment

▼ Pastoral

Year Groups

Registration Forms

Houses

▼ Academic

Courses

Year Groups: 2019/2020

Academic Year: 2019/2020 ▾

Listing Enrolments

Year Groups for 2019/2020 + Add

No Year Groups for 2019/2020

3. Enter the details for your year group and click *Save Changes*

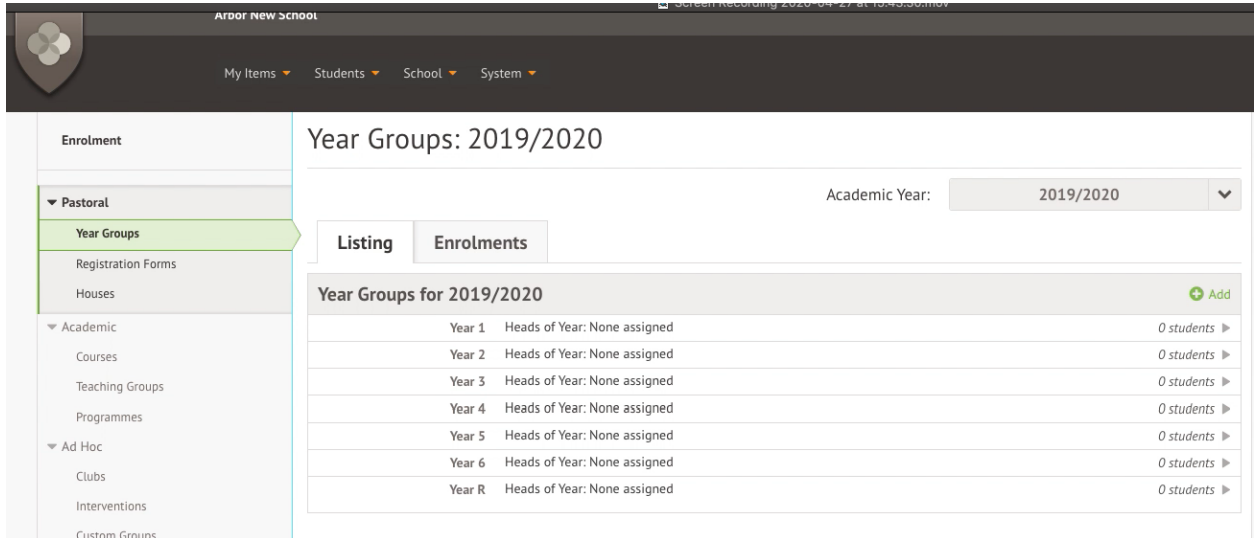
Add New Year Group to 2019/2020

Academic Year	2019/2020
Year Group Name*	<input type="text" value="E.g. Year 1"/>
Short Name	<input type="text" value="E.g. Y1"/>
Curriculum Grade*	<input type="text" value=""/> ▾
Target Enrolment Ⓞ	<input type="text" value=""/> ▾

Cancel

Save Changes

- Repeat the above steps until you have entered all year groups



Year Groups: 2019/2020

Academic Year: 2019/2020

Listing Enrolments

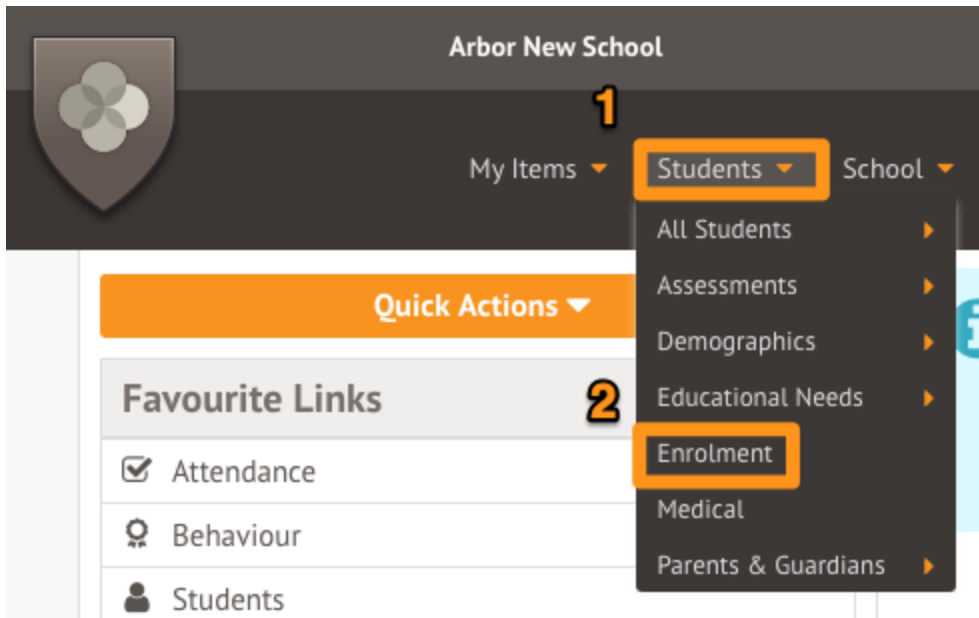
Year Groups for 2019/2020			Add
Year 1	Heads of Year: None assigned	0 students	▶
Year 2	Heads of Year: None assigned	0 students	▶
Year 3	Heads of Year: None assigned	0 students	▶
Year 4	Heads of Year: None assigned	0 students	▶
Year 5	Heads of Year: None assigned	0 students	▶
Year 6	Heads of Year: None assigned	0 students	▶
Year R	Heads of Year: None assigned	0 students	▶

Here is what you should see if you have Reception to Year 6. If you have Nursery students you will need to add year groups for them

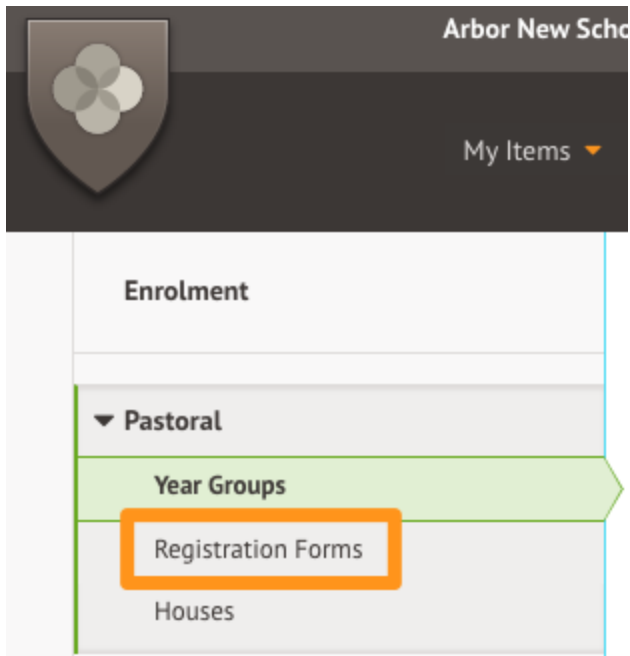
Creating Registration Form Groups

You will now need to create your registration from groups in Arbor, you can have multiple groups per academic year depending on your school structure. Details of this can be found in your workbook in tab **.8 Registration Form**.

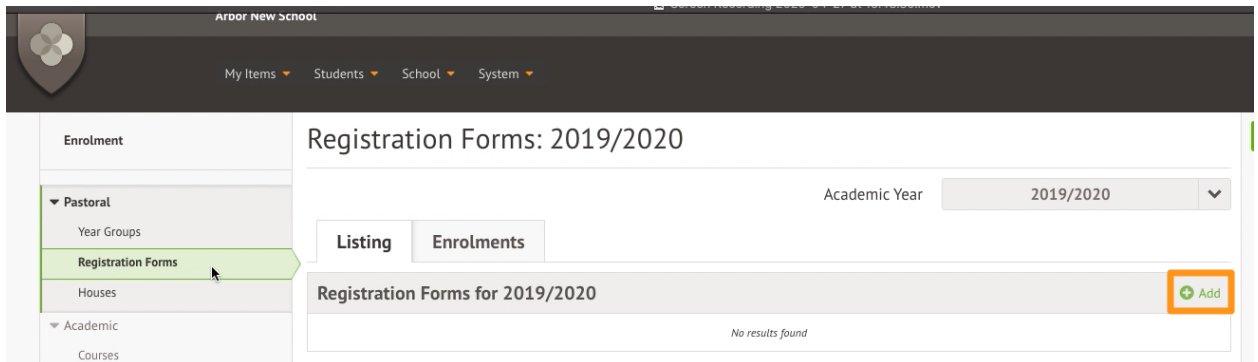
- Go to **Students > Enrolment**



2. Click on *Registration Forms* on the left



3. Click on the *Add* button



ARBOR NEW SCHOOL

My Items ▾ Students ▾ School ▾ System ▾

Enrolment

▼ Pastoral

Year Groups

Registration Forms

Houses

▼ Academic

Courses

Registration Forms: 2019/2020

Academic Year 2019/2020 ▾

Listing Enrolments

Registration Forms for 2019/2020 Add

No results found

4. Enter the details for your registration form

Create Registration Form

Academic Year 2019/2020

Registration Form Name*

Short Name

Room

Year Group

Target Enrolment

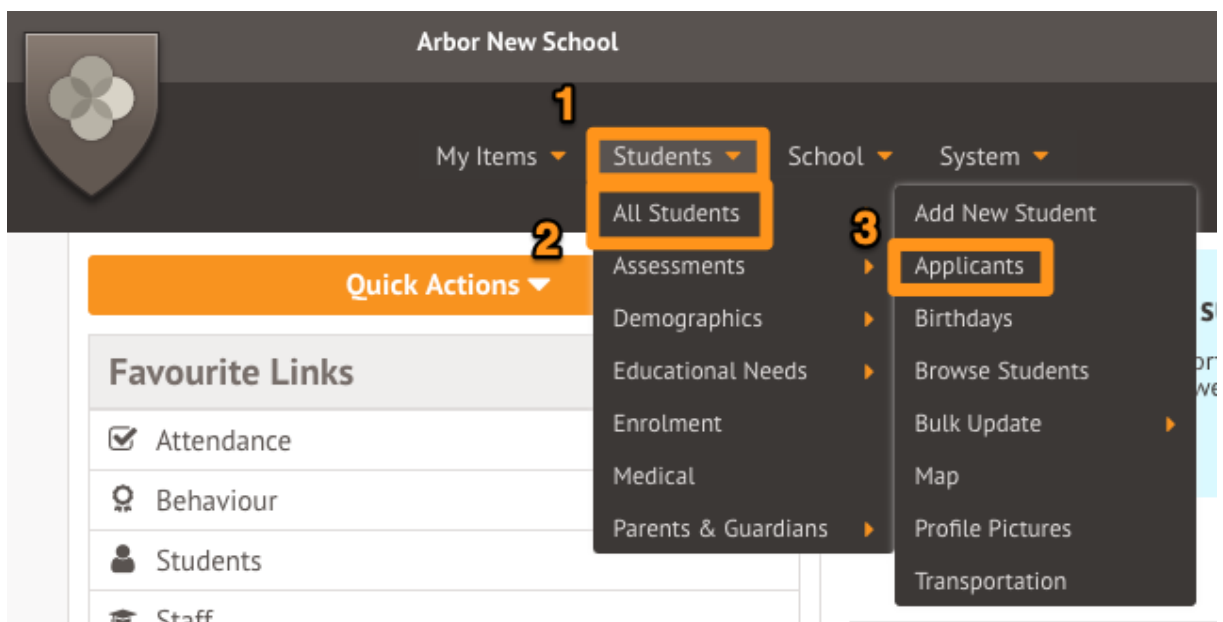
Please note: Information such as Short Name and Room are not required and don't need to be added. Please just focus on filling out the two highlighted rows. If you have mixed classes e.g. Year 1 and Year 2 together you can select multiple Year Groups in the form.

5. Repeat the above steps until you have entered all registration forms

Creating an Applicant Intake

We designed this step to make it as easy as possible for you to get your student data and CTF's into Arbor. Creating your applicant intake will allow you to bulk enrol students later on. We will be creating an applicant season for each year group of students.

1. Go to *Students > All Students > Applicants*



2. Click on the *Add* button
3. Fill out the details on the form and click *Create Intake Season*

Create Intake Season

Intake season name*	Year 6 - Student Migrations	
Academic Year*	2019/2020	✕ ▼
Start date	1st Sep 2019	📅
End date		📅
Published admissions number	Not set	▲ ▼
Target application number	Not set	▲ ▼

CancelCreate Intake Season

Please fill out the form with the following convention {Year Group} - Student Migrations. You will also need to make sure you change the start date to the first date of your current academic year.

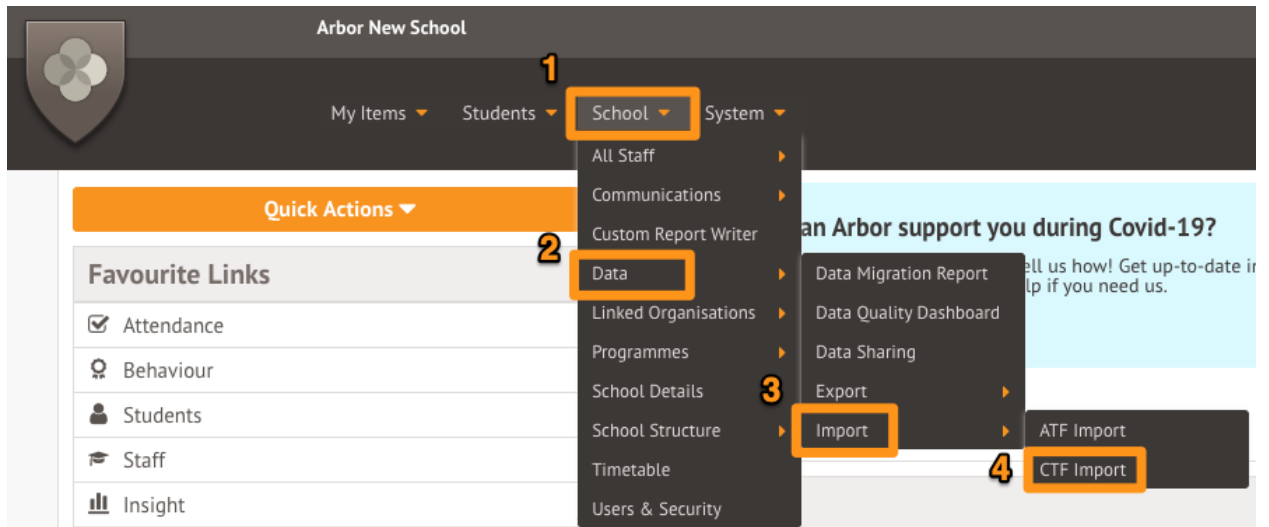
4. Repeat the above steps until you have created an Intake Season for each your group migrating

Import Student CTF's

At this point you will now need to import the student CTF's into Arbor.

It is important to remember that if you change any data in your previous MIS you will also need to update in Arbor.

1. Go to *School > Data > Import > CTF Import*




2. Click on the '**Add**' button
3. Click on the **Browse** button
4. Select where the CTF file is stored on your PC and click **Upload**
5. Select the appropriate *Intake Season* from on the ones created earlier

Import CTF

Information

This page lets you upload a CTF file to import students into or update students already in the system. Once the file is uploaded you will be presented with further options as to which student or students you would like to import (or update if already in the system), as well as which parts of the CTF you would like to import or update.

CTF file (.xml)* 

C:\fakepath\2070000_CTF_XXXXXXX_00

Browse...

Default intake season

Use an intake season if this CTF contains new stud 

Year 1 - Student Migrations

Year 2 - Student Migrations

Year 3 - Student Migrations

Year 4 - Student Migrations

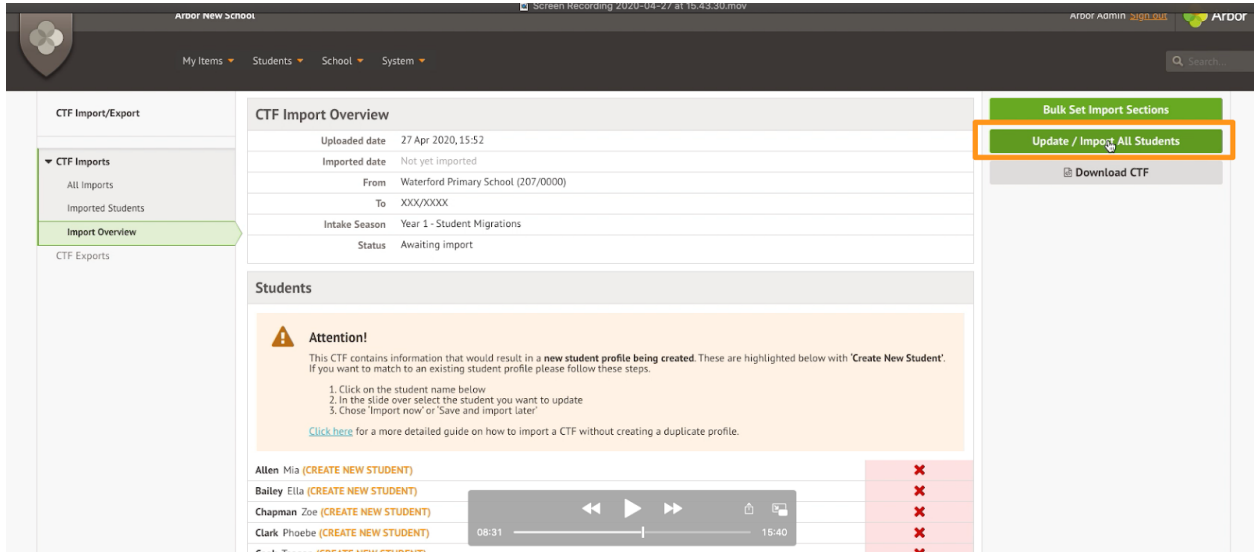
Year 5 - Student Migrations

Year 6 - Student Migrations

Year R - Student Migrations

6. Click the **Upload** button

- Click the **Upload/Import** button



The screenshot shows the Arbor CTF Import Overview page. The sidebar on the left has 'CTF Imports' expanded, with 'Import Overview' selected. The main content area is titled 'CTF Import Overview' and contains the following information:

Uploaded date	27 Apr 2020, 15:52
Imported date	Not yet imported
From	Waterford Primary School (207/0000)
To	XXXX/XXXX
Intake Season	Year 1 - Student Migrations
Status	Awaiting import

Below the overview is a 'Students' section with an 'Attention!' warning: 'This CTF contains information that would result in a new student profile being created. These are highlighted below with 'Create New Student'. If you want to match to an existing student profile please follow these steps: 1. Click on the student name below, 2. In the slide over select the student you want to update, 3. Choose 'Import now' or 'Save and import later'. A link to a guide is provided: [Click here](#) for a more detailed guide on how to import a CTF without creating a duplicate profile.

The student list includes:

Allen Mia	(CREATE NEW STUDENT)	X
Bailey Ella	(CREATE NEW STUDENT)	X
Chapman Zoe	(CREATE NEW STUDENT)	X
Clark Phoebe	(CREATE NEW STUDENT)	X
Clark Tassan	(CREATE NEW STUDENT)	X

A video player is visible at the bottom of the page, showing a progress bar from 08:31 to 15:40.

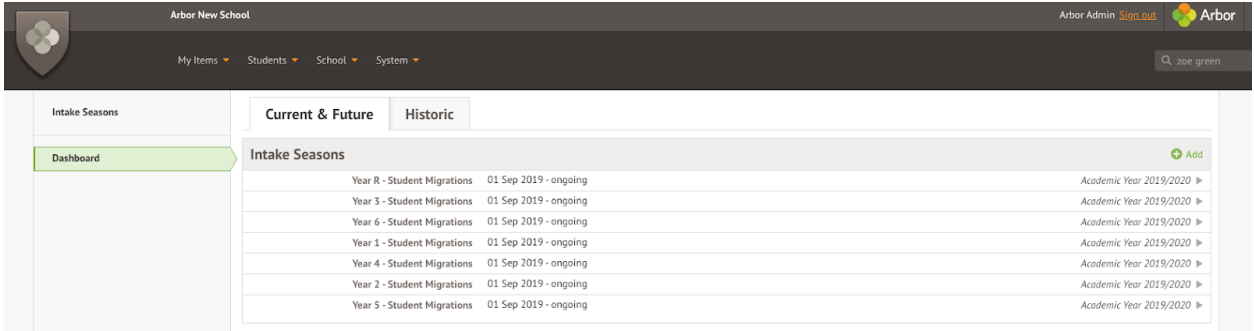
- Repeat the above steps until you've imported all the CTFs for each year group making sure to link them to the correct *Intake Season*

Resolving In Year Admissions

If you have any in-year admissions you will need to edit the expected start date of these students as part of the applicant intake season. If you don't have any in-year admissions you can skip this part and move onto *Assign Year Groups, Registration Forms and Enrolling*

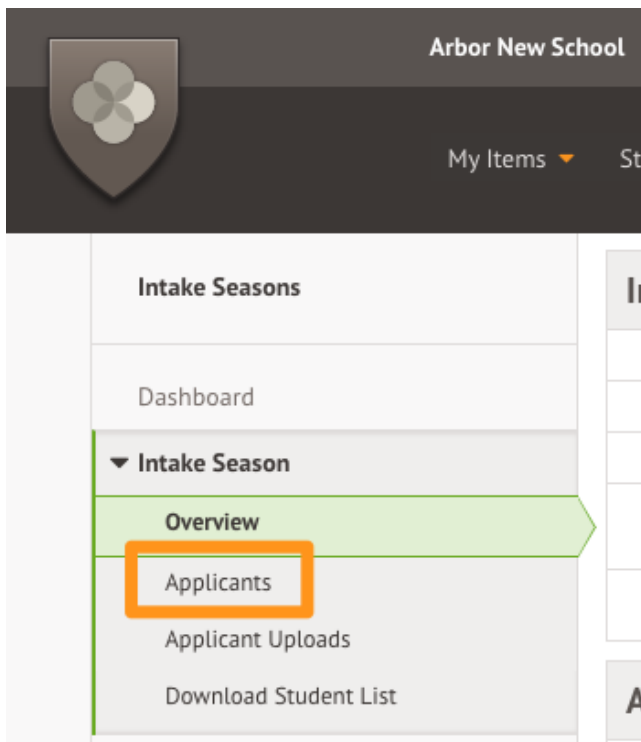
You will need to have your list of in-year admissions, details of this can be found in your workbook in tab **.4 Current Academic Year Leavers**

- Go to **Students > All Students > Applicants**
- Click on the relevant *Intake Season*




Intake Seasons			+ Add
Year R - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 3 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 6 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 1 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 4 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 2 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶
Year 5 - Student Migrations	01 Sep 2019 - ongoing		Academic Year 2019/2020 ▶

- Click on **Applicants** on the left

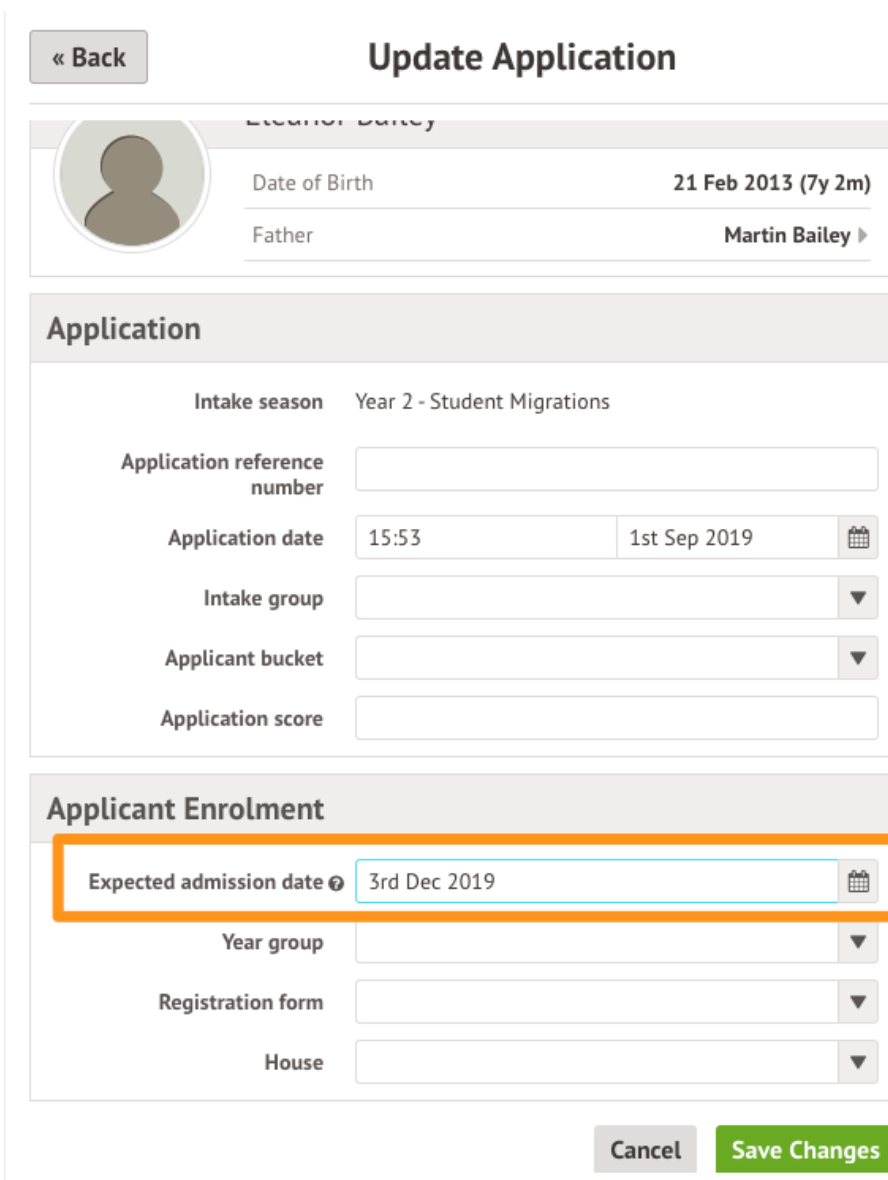


- Find the student that was an in-year admission in the list and click on their name
- Click on the **Edit** button



The screenshot shows the Arbor Admin interface. On the left is a navigation menu with 'Intake Seasons' selected. The main area displays a table of 'Year 2 - Student Migrations Applicants' with columns for Student, Date, Status, #, Y. Group, and Reg. Form. The application for Eleanor Bailey is highlighted. On the right, a detailed view of the application is shown, including a 'Back' button, an 'Edit' button, and fields for Date of Birth (21 Feb 2013 (7y 2m)) and Father (Martin Bailey).

- Change the *Expected admission date* to the date they started this year



The screenshot shows the 'Update Application' form. At the top, there is a 'Back' button and the title 'Update Application'. Below this is a profile section for Eleanor Bailey, showing her Date of Birth as 21 Feb 2013 (7y 2m) and her Father as Martin Bailey. The 'Application' section contains fields for Intake season (Year 2 - Student Migrations), Application reference number, Application date (15:53, 1st Sep 2019), Intake group, Applicant bucket, and Application score. The 'Applicant Enrolment' section contains fields for Expected admission date (3rd Dec 2019), Year group, Registration form, and House. The 'Expected admission date' field is highlighted with an orange box. At the bottom, there are 'Cancel' and 'Save Changes' buttons.

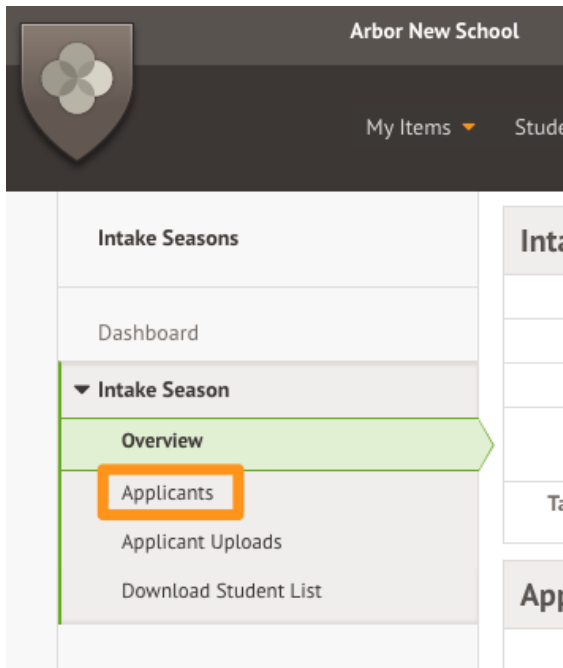


7. Click *Save Changes*
8. Repeat the above steps for in-year admissions

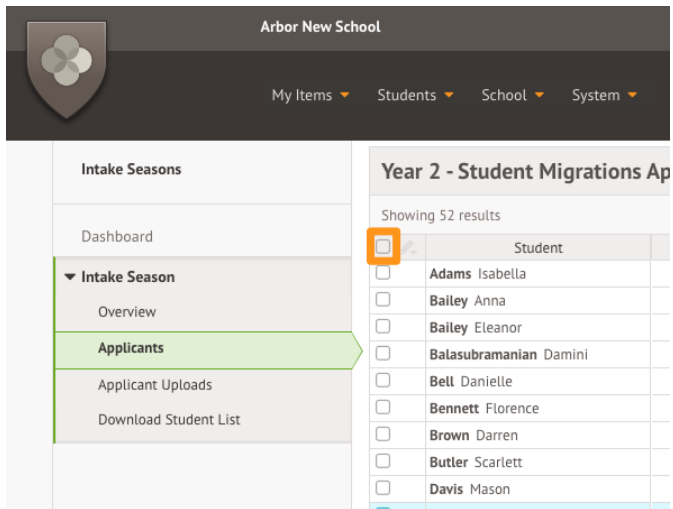
Assign Year Groups, Registration Forms and Enrolling

In these steps, we will be assigning student year groups and registration forms in bulk before finally enrolling the students.

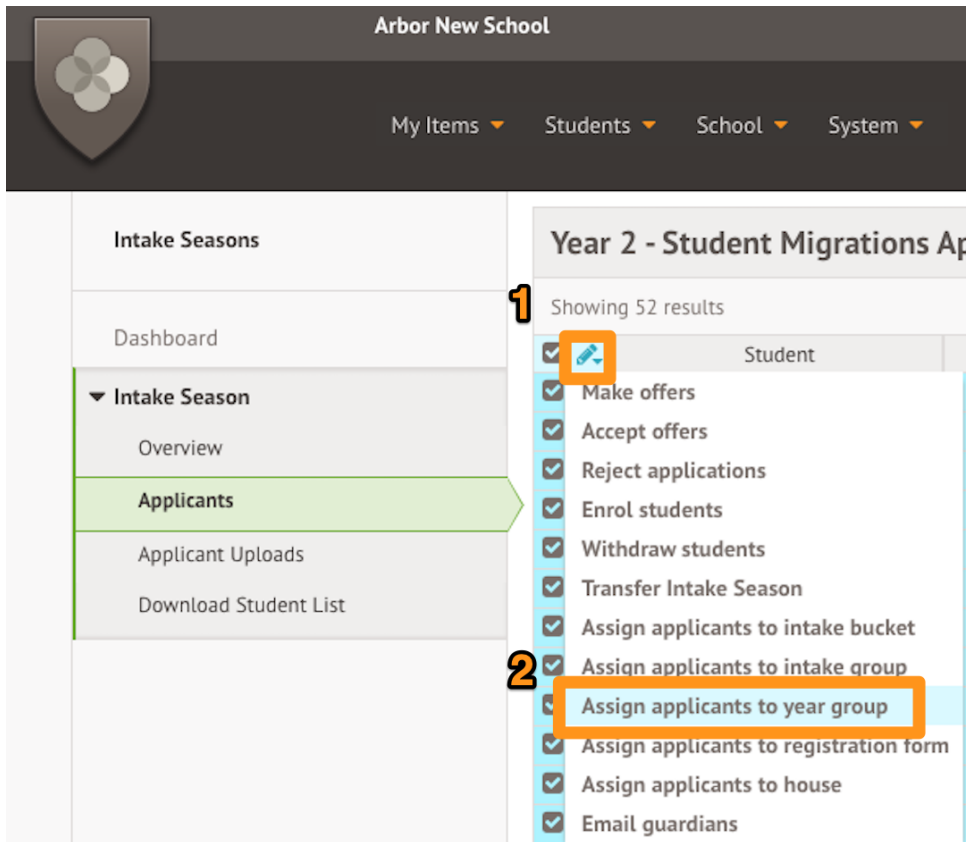
1. Go to *Students > All Students > Applicants*
2. Click on one of the *Intake Seasons*
3. Click on *Applicants* on the left



4. Tick the checkbox to select all students in the list



5. Click on the pencil icon to and select *Assign applicants to year group*



The screenshot shows the Arbor New School interface. On the left is a navigation menu with 'Intake Seasons' expanded to show 'Applicants'. On the right, a slide-over titled 'Year 2 - Student Migrations' is open, displaying 'Showing 52 results'. A table with a 'Student' column is visible. A dropdown menu is open, listing various actions. The 'Assign applicants to year group' option is highlighted with an orange box and labeled with a '2'. A pencil icon is also highlighted with an orange box and labeled with a '1'.

6. In the slide over select the relevant *Year Group* and click **Add to Year Group**
7. Tick the checkbox to select all students in the list
8. Click on the pencil icon to and select **Assign applicants to registration form**
9. In the slide over select the relevant *Registration Form* and click **Enrol in registration form**
10. Tick the checkbox to select all students in the list
11. Click on the pencil icon to and select **Accept offer**
12. In the slide over click **Accept Offers**
13. Tick the checkbox to select all students in the list

14. Click on the pencil icon to and select **Enrol Student**
15. In the slide over click **Enrol Students**
16. Repeat the above steps for the remaining year groups

What to do if you are a two or more registration form entry?

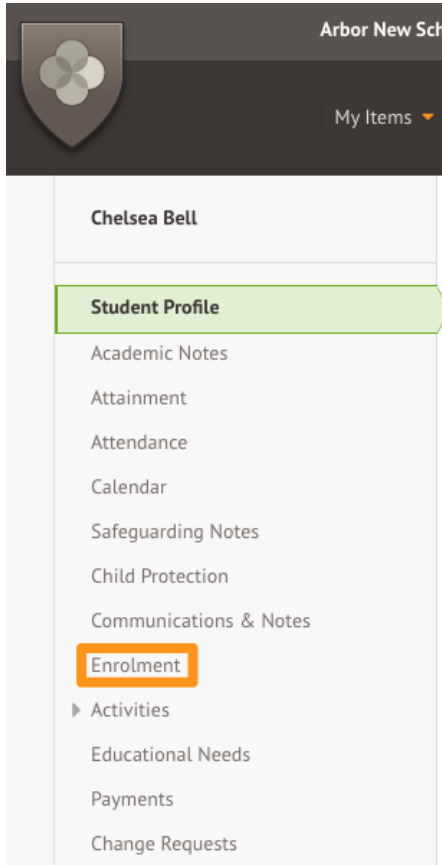
1. Go to **Students > All Students > Applicants**
2. Click on one of the *Intake Seasons*
3. Click on **Applicants** on the left
4. Tick the checkbox to select all students in the list
5. Click on the pencil icon to and select **Assign applicants to year group**
6. In the slide over select the relevant *Year Group* and click **Add to Year Group**
7. Tick the checkbox next to the students name until you've ticked one form group
8. Click on the pencil icon to and select **Assign applicants to registration form**
9. In the slide over select the relevant *Registration Form* and click **Enrol in registration form**
10. Repeat Steps 7, 8, 9 until all students in the Year Group have been assigned a registration form
11. Tick the checkbox to select all students in the list
12. Click on the pencil icon to and select **Accept offer**
13. In the slideover click **Accept Offers**
14. Tick the checkbox to select all students in the list
15. Click on the pencil icon to and select **Enrol Student**
16. In the slide over click **Enrol Students**
17. Repeat the above steps for the remaining year groups

Off roll current academic year leavers

All students from the current academic year (both leavers and current) have been added to Arbor and enrolled into the academic. The next thing to do is to unenrol them from Arbor. You don't need

to do your Year 6 students who will be moving to secondary school, this can be managed as part of the New School Year Setup.

1. Go to the students profile
2. Click on **Enrolment** on the left



Arbor New School

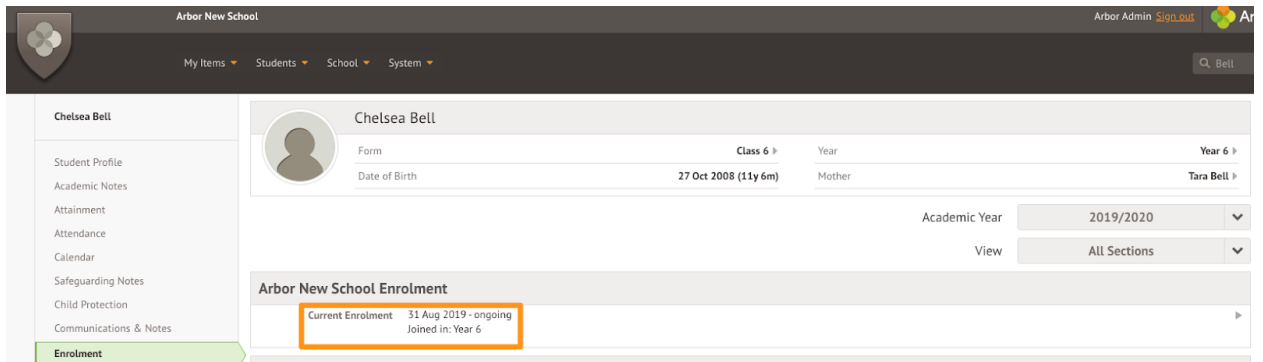
My Items ▾

Chelsea Bell

Student Profile

- Academic Notes
- Attainment
- Attendance
- Calendar
- Safeguarding Notes
- Child Protection
- Communications & Notes
- Enrolment**
- ▶ Activities
- Educational Needs
- Payments
- Change Requests

3. Click on the *Current Enrolment*



Arbor New School

Arbor Admin [Sign out](#)

My Items ▾ Students ▾ School ▾ System ▾

Chelsea Bell

Form **Class 6 ▶** Year **Year 6 ▶**

Date of Birth **27 Oct 2008 (11y 6m)** Mother **Tara Bell ▶**

Academic Year **2019/2020** ▾


View **All Sections** ▾

Arbor New School Enrolment

Current Enrolment 31 Aug 2019 - ongoing
Joined in: Year 6

4. In the slide over click on the **Unenrol Student** button

« Back **Enrolment at Arbor New School** Edit

 **Chelsea Bell**

Form	Class 6 ▶
Year	Year 6 ▶
Date of Birth	27 Oct 2008 (11y 6m)
Mother	Tara Bell ▶

Enrolment Period

Dates	31 Aug 2019 - ongoing
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Academic Year Enrolments For Period

2019/2020	31 Aug 2019 - 31 Aug 2020
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Unenrol Student »

5. Fill out the relevant information (make sure you change the Leaving Date) and click the **Unenrol Student** button




[« Back](#) **Unenrol Student**



Chelsea Bell

Form	Class 6 ▶
Year	Year 6 ▶
Date of Birth	27 Oct 2008 (11y 6m)
Mother	Tara Bell ▶

Leaving Details

Leaving Date*	28th Apr 2020	
Leaving Reason*	In year transfer - Maintained school	 ▼
Grounds for Removal ⓘ	Left School	 ▼

[Cancel](#) [Unenrol & Add Destination School](#) [Unenrol Student](#)

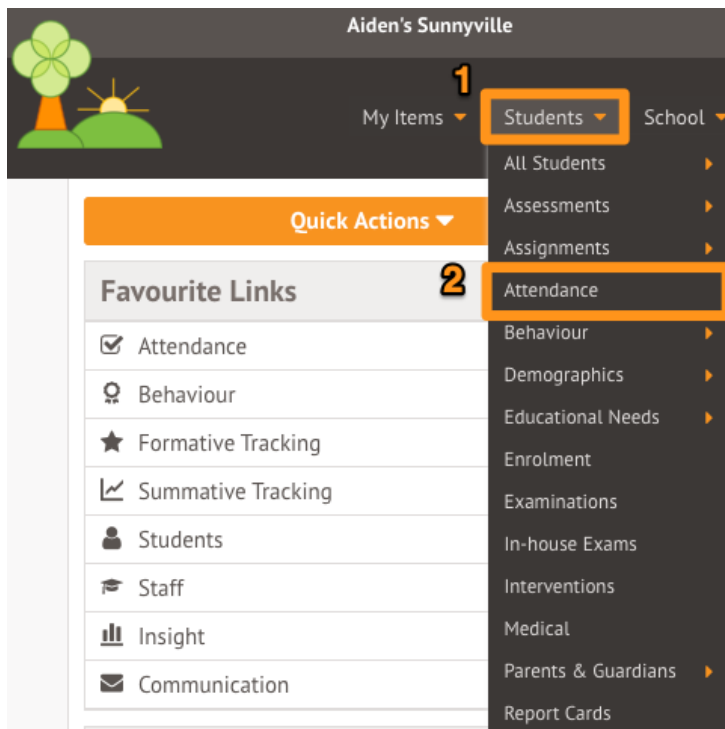
Defining Roll Call times

In Arbor, Roll Call marks are derived from the 'best attendance marks' taken between the school's AM or PM roll call times. For example, if a student is attending an intervention during Roll Call time and is marked absent in their class register, they will be marked present in Roll Call as long as they are marked present in the intervention.

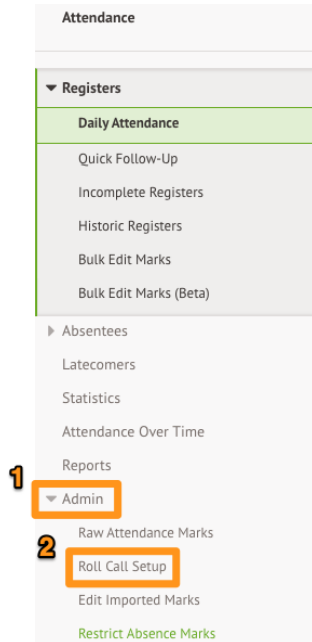
The 'best mark' can include lesson attendance, interventions and internal exclusion attendance marks.

You can only create/amend roll call times between 2 pm and 5 pm.

1. Go to *Students > Attendance*



2. Click on **Admin** on left and then **Roll Call Setup**







3. Click on the **Add** button next to the **Morning** heading



4. In the slide over, add the times of your morning roll call
5. Enter the start date being the beginning of the current academic year and leave the end date blank.

Add Roll Call Time

Please note: adding roll call times will trigger a recalculation of all roll call attendance marks for the given date range.
To avoid this affecting roll call attendance statistics during school hours, you can only amend roll call times between 2pm and 5pm.
The recalculation of roll call attendance marks will take some time.

Roll call	Morning
Register opens time*	<input type="text" value="08:30"/> 
Register closes time*	<input type="text" value="08:45"/> 
Effective date	<input type="text" value="1st Sep 2019"/> 
End date	<input type="text" value="Ongoing"/> 

Cancel Add Roll Call Time

6. Click **Add Roll Call Time**
7. Repeat the above steps but for the afternoon

Now you have the basic student, staff and school structure data you will need to get your next academic year set up so that you are ready for go-live day.

Creating your next academic year

We have a tried and tested New School Year Setup wizard that you can now use. A number of steps must be completed to successfully set up the next Academic Year on Arbor. To make this as simple and hassle free as possible for you, we have created an easy to follow process to ensure you set up everything you need to, and in the right way.



We recommend that you watch our webinar for completing the New School Year setup before going any further.

Step 1 - Create your Academic Year

1. Go to *School > School Structure > Academic Year*.
2. Click on the **Add** button
3. Enter the information regarding your next academic year
4. Then go to *School > School Structure > School Year Setup*
5. Click on to the **Academic Year** option



In the **Terms** section, add all the dates you are scheduled to run courses and classes for. Click **+Add** to add a new term.

Please note, your term dates should span the full term. Do not set up 6 half terms, because this will cause an error message when you try to add half term holidays. Half Term holiday can be added within the holidays section instead, shown below.

Add Term

Academic Year	2020/2021
Term Name*	<input type="text" value="Autumn Term"/>
Short Term Name	<input type="text"/>
Start Date*	<input type="text" value="7th Sep 2020"/>
End Date*	<input type="text" value="18th Dec 2020"/>

Once you have added all your term dates, the left hand side of the screen will highlight any gaps in data.

Academic Calendar

Academic Year 2020/2021	
Academic year name	2020/2021 ▶
Dates	01 Sep 2020 - 31 Aug 2021 ▶
Terms (2020/2021) + Add	
Autumn Term	07 Sep 2020 - 18 Dec 2020 ▶
Spring Term	04 Jan 2021 - 02 Apr 2021 ▶
Summer Term	19 Apr 2021 - 27 Jul 2021 ▶
Holidays (2020/2021) + Add	
Caution: No holidays have been added for 2020/2021	

Days Unaccounted For

Below is a list of days in the Academic Calendar which are currently unaccounted for. Add Terms and Holidays to ensure all days are accounted for. Once this is done, you'll be able to review and mark the Academic Calendar as complete.

- 01 Sep 2020 - 04 Sep 2020
- 21 Dec 2020 - 25 Dec 2020
- 28 Dec 2020 - 01 Jan 2021
- 05 Apr 2021 - 09 Apr 2021
- 12 Apr 2021 - 16 Apr 2021
- 28 Jul 2021 - 30 Jul 2021
- 02 Aug 2021 - 06 Aug 2021
- 09 Aug 2021 - 13 Aug 2021
- 16 Aug 2021 - 20 Aug 2021
- 23 Aug 2021 - 27 Aug 2021
- 30 Aug 2021 - 31 Aug 2021



You can fill these gaps by adding in all your holidays (Half terms, christmas and easter break etc) in the **Holiday** section. **Ensure you include all of your holiday dates to ensure there are no attendance registers created on these dates.**

Add in all your half terms, vacation dates and public holidays. **Holidays to be set up in the UK include Christmas, Easter, and summer breaks, mid-term holidays, any inset or training days, any public holidays or religious days.**

Please note, you do not have to include weekends.

Click **+Add** to add a new holiday.

Add Academic Holiday

Holiday name

Holiday type* ✖ ▼

Start date* 📅

End date* 📅

Cancel Add Academic Holiday

You should only use the '**Holiday Type**' of '**Half-Term**' for the actual half-term breaks (October, February and May). This is to ensure you are able to use the '**Half-Termly assessment period**' for assessments, among other things.

Add Academic Holiday

Holiday name	<input type="text" value="Autumn half term"/>
Holiday type*	<input type="text" value="Half-Term"/> ✖ ▼
Start date* 📅	<input type="text" value="26th Oct 2020"/> 📅
End date* 📅	<input type="text" value="30th Oct 2020"/> 📅

Now I have added all my relevant holidays, training days etc, I can see there are now no gaps in the dates, and all dates have been accounted for. Click **Mark Academic Calendar as Complete**.


Academic Calendar


Academic Year 2020/2021		
Academic year name	2020/2021	▶
Dates	01 Sep 2020 - 31 Aug 2021	▶
Terms (2020/2021) + Add		
Autumn Term	07 Sep 2020 - 18 Dec 2020	▶
Spring Term	04 Jan 2021 - 02 Apr 2021	▶
Summer Term	19 Apr 2021 - 27 Jul 2021	▶
Holidays (2020/2021) + Add		
September inset days	01 Sep 2020 - 04 Sep 2020	<i>Inset</i> ▶
Autumn half term break	26 Oct 2020 - 30 Oct 2020	<i>Half-Term</i> ▶
Christmas break	21 Dec 2020 - 01 Jan 2021	<i>Vacation</i> ▶
Spring half term break	15 Feb 2021 - 19 Feb 2021	<i>Half-Term</i> ▶
April bank holiday	02 Apr 2021	<i>Public Holiday</i> ▶
Easter break	05 Apr 2021 - 16 Apr 2021	<i>Vacation</i> ▶
May bank holiday	03 May 2021	<i>Public Holiday</i> ▶
Summer half term break	31 May 2021 - 04 Jun 2021	<i>Half-Term</i> ▶
Summer inset days	26 Jul 2021 - 27 Jul 2021	<i>Inset</i> ▶
Summer break	28 Jul 2021 - 31 Aug 2021	<i>Vacation</i> ▶

Days Unaccounted For

All days have been accounted for.

Please note, if you make any further changes to the academic calendar you must click the red **Return to incomplete** button, then make your edits.

 Download Term Card

 Download Student List

Academic Calendar setup was marked as complete on **01 Apr 2019, 16:28**.
Click below return Academic Calendar to incomplete and make changes.

Return to incomplete

Amend Academic Calendar

You are about to return Academic Calendar to the "incomplete" state, so that changes can be made. This will **prevent Off-Roll Leavers, Year Groups & Registration Forms, Custom Groups, Houses, Courses & Classes, Meals, Interventions** from being completed.
Are you sure you wish to continue?

Cancel

Return to Incomplete

You must then again click the **Mark calendar as Complete** button to save your changes.

Days Unaccounted For

All days have been accounted for.

Mark Calendar as Complete

Check you've set up your calendar correctly

Go to *School > School Structure > School Year Setup > 1. Academic Calendar*. In the example below, you can see that the Autumn term is set to end on the 18th December, but because the Christmas break holiday is set to start on the 18th December, this overrides the term dates. There will be no registers on the 18th December.

Terms (2020/2021)		+ Add
Autumn Term	07 Sep 2020 - 18 Dec 2020	▶
Spring Term	04 Jan 2021 - 02 Apr 2021	▶
Summer Term	19 Apr 2021 - 27 Jul 2021	▶

Holidays (2020/2021)		+ Add
September inset days	01 Sep 2020 - 04 Sep 2020	<i>Inset</i> ▶
Autumn half term break	26 Oct 2020 - 30 Oct 2020	<i>Half-Term</i> ▶
Christmas break	18 Dec 2020 - 01 Jan 2021	<i>Vacation</i> ▶

To fix this, make sure that your vacations do not overlap with your term dates.

To do this, click into the date you would like to amend. In the example, I need to change the start date for Christmas Break to reflect the first date there should be no registers for. The holiday should actually be scheduled to start on the 21st (Arbor automatically discounts weekends).

Edit Academic Holiday

Holiday name

Holiday type* ✕ ▼

Start date* 📅

End date* 📅

Delete
Cancel
Save Changes

Step 2 - Off - Roll Leavers



When you return to the New School Year Overview, you can see that the **Academic Calendar** section has been marked as **Complete** and other sections have now become available. The next step is to choose when your cohort of leaving students will be unenrolled.

1. Academic Calendar	Complete
2. Off-Roll Leavers	Available
3. Year Groups & Register	Available
4. Custom Groups	Available
5. Houses	Locked
6. Courses & Classes	Locked
7. Meals	Locked
8. Interventions	Available

2. Off-Roll Leavers

Off-Roll Leavers setup is available and needs to be marked as complete

The ability to Off-Roll Leavers helps save you time as you don't need to end students who are moving on individually via their Student Profile.

Off-Roll Leavers

Off-Roll 2019/2020 Leavers

1. Off-Roll Leavers [Click here to off-roll leavers. You can review already off-rolled leavers below.](#)

Review 2019/2020 Leavers

This table shows students who left the school in the last term of 2019/2020.

There are no results [Download](#)

Student	Year	Leaving Date	Reason	Destination
No rows to display.				

Instructions

Off-Roll Leavers setup steps are optional. Once you have reviewed Off-Roll Leavers, click Mark as complete to complete setup or click Skip for now to review later.

[✓ Mark as complete](#)

[↔ Skip for now](#)

To Off-roll your leavers, click the **Off-Roll Year Leavers** field. In the slide over, choose which year group to off-Roll leavers from. It is more than likely it will just be your Year 6 who you want to Off-Roll. Click Year 6, this will bring up a list of all students in Year 6 (the list does not contain students who have already been marked as leavers.) In this example I have selected all my old year 6 students.

« Back **Off-Roll 2019/2020 Leavers**

2019/2020 Year Groups

Please select the year group you wish to off-roll leavers for.

Nursery 1	▶
Nursery 2	▶
Reception	▶
Year 1	▶
Year 2	▶
Year 3	▶
Year 4	▶
Year 5	▶
Year 6	▶

This will bring up a list of all students in Year 6. The list does not contain students who have already Off-Rolled. You should confirm which students you would like to select, their leaving date and their destination.

Please note: This leaving information will be included in all students that have been selected. To add different leaving dates or reasons, unselect certain students and repeat the process, selecting only them.

« Back **Off-Roll Year 6 (2019/2020) Leavers**


Tick the students you wish to off-roll and enter the leaving date and the reason for leaving. Please note that the list does not contain students who have already been marked as leavers.


Year 6 (2019/2020) Students

Bailey Jonathan

Banik Yadu

Leaving Details

Leaving Date* 31st Aug 2020 

Leaving Reason* End of phase transfer - Maintained school 

Cancel **Process Leavers**

You can Off-Roll any other students in the same way. Just select the year group they are part of, and untick every other student in that year group.

« Back

Off-Roll Year 3 (2019/2020) Leavers

Tick the students you wish to off-roll and enter the leaving date and the reason for leaving. Please note that the list does not contain students who have already been marked as leavers.

Year 3 (2019/2020) Students


Anderson Freya

Anderson Ruth

Bailey Julie


Leaving Details


Leaving Date* 

Leaving Reason*  

Cancel
Process Leavers

If you have any students who are moving to one of your linked schools, tick the box next to their name and click the blue pencil icon to select **Set destination School**.

Showing 4 results  Download ▼

<input type="checkbox"/>  Student ▲	Year	Leaving Date	Reason	Destination
<input checked="" type="checkbox"/> Set Destination School	Year 6	31 Aug 2020	End of phase transfer - Main...	
<input type="checkbox"/> Carter Dan	Year 6	31 Aug 2020	End of phase transfer - Main...	

« Back **Set Destination School**

Students

The below students will have their destination school set to the school selected.

Bell Lily *Leaving Date: 31 Aug 2020*

Destination School* ▼

Destination School Details ⓘ No school selected

Expected Entry Date* ⓘ 1st Sep 2020

Cancel **Set Destination School**

Generating CTFs for your leavers

Once you've set destination schools, you can generate a CTF with your Leaver's information by scrolling down to the bottom of the page and clicking.

Leaver Destinations		
Aiden's Sunnyville (31 Aug 2020)	1 student	Create CTF for these students ▶

New Full CTF Export (step 1 of 2)

CTF Details

Destination* ▼

Cancel **Next »**

« Back **CTF New Custom CTF Export (step 2 of 2)**

CTF Details

CTF Type Full CTF file

Destination LA

School*

Notes (output in CTF)

Student Philip Adams

Cancel Create CTF

You can edit any of the student's information by clicking on their name in the table and clicking Edit in the slide over. You can then amend the information if incorrect, or add a new enrolment if a student has returned to school after a period of absence.

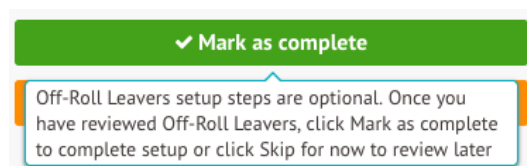
Leaving Reason

Grounds for Removal

Note

Cancel Delete Create New Enrolment Save Changes

When you are happy that this section is now complete, click the green **Mark as Complete** button. You can do this for all the subsequent sections.





The Off-Roll Leavers section of the **School Year Setup** will then display as **Complete**. If you wish to return to this step and make any changes, click the red **Return to incomplete** button. When finished, you must then again click the **Mark as Complete** button to save your changes.

Instructions

Off-Roll Leavers setup was marked as complete on **02 Apr 2019, 12:18** , click the button below to return Off-Roll Leavers to incomplete.

Return to incomplete

Step 3 - Year Groups & Registration Forms

The next step is to set up your Year Groups and Registration forms for next year. You **must** complete this step.

Year Groups & Registration Forms

Setup 2020/2021		
1. Copy year groups and registration forms	Incomplete	▶
2. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors	
3. Promote Year Group Students	No Year Groups exist for 2020/2021.	
4. Enrol Applicants	There are no applicants for the new school year	▶
5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	No Registration Forms exist for 2020/2021.	
7. Review and tweak registration form enrolments	Optional	▶

Review	
Year Groups (2020/2021)	+ Add
<i>No Year Groups exist for 2020/2021</i>	
Registration Forms (2020/2021)	+ Add
<i>No Registration Forms exist for 2020/2021</i>	

Copy year groups and registration forms

First, choose which year groups and registration forms to copy over to next year by clicking in the first field.



Top Tip: Don't worry if your registration forms will have different names next year. You can easily amend the names of form after you have completed your New School Year Setup. For example, if you know that the 3CD registration form will be called 3EF, just copy the 3CD registration form then easily amend the name by going to the **Registration Form Overview**, selecting next year's then amending the name.

1. Copy year groups and registration forms Incomplete

Untick any year groups and registration forms you don't want to copy over, then click **Copy Year Groups**.

Copy Year Groups and Registration Forms

Tick the year groups and registration forms you would like to copy to the next academic year. If you untick a year group but leave a registration form for the year group ticked, the registration form will still be copied, but it will not be linked to a year group. Student enrolments will not be carried forward in this step.

Nursery

Year group Nursery

Registration forms N1

Cancel

Copy Year Groups

Adding additional year groups or registration forms

You can add additional Year Groups or Registration forms if needed. Scroll down to the bottom of the **Year Groups & Registration Forms** page.

Make further changes to Year Groups	▶
Make further changes to Registration Forms	▶

Click **+Add** to add a new group.

Registration Forms: 2020/2021

Academic Year	2020/2021	▼
Listing	Enrolments	
Registration Forms for 2020/2021		+ Add

Create Registration Form

Academic Year	2020/2021
Registration Form Name*	<input type="text" value="E.g. Form 7A"/>
Short Name	<input type="text" value="E.g. 7A"/>
Room	<input type="text"/> ▼
Year Group	<input type="text"/> ▼
Target Enrolment	<input type="text"/> ▲▼

Assign tutors to year groups and registration forms

Next, click the **Assign Tutors** field to add this information.

Setup 2020/2021		
1. Copy year groups and registration forms	15 out of 15 year groups copied, 27 out of 27 registration forms copied	
2. Assign tutors to year groups and registration forms	Incomplete	▶
3. Promote Year Group Students	0 out of 15 promoted	▶
4. Enrol Applicants	Incomplete	▶
5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	0 out of 27 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Choose the staff members you would like to assign as heads of year and registration forms. Arbor will pre fill these fields based on your setup this year, but you can amend them if you wish by clicking the X button next to a name and adding a new name from the list (if you already have a [staff profile set up](#) for them). When you have chosen your tutors, click the green **Assign Tutors** button.

If you know there will be staffing changes but don't know who will be teaching each class, you can assign the staff you know will be registration tutors and leave the forms with no tutor yet confirmed blank. **You'll need to assign the tutors from the class page when you do know, [click here to see how.](#)**

Assign Tutors

Assign the tutors to the year groups and registration forms for next academic year below. We have suggested tutors to assign based on this year's setup.

Nursery 1 (2020/2021)	
Heads of Year	<input type="text" value="Adele Lewis"/>
Nursery (2020/2021) tutors	<input type="text"/>

Nursery 2 (2020/2021)	
Heads of Year	<input type="text"/>
Nursery (2020/2021) tutors	<input type="text"/>

Reception (2020/2021)	
Heads of Year	<input type="text" value="Patricia Richardson"/>
Form REKE (2020/2021) tutors	<input type="text" value="Daisy Phillips"/>
Form REYH (2020/2021) tutors	<input type="text" value="Patricia Richardson"/>

If you've left a registration form with no tutor, you'll see a message telling you that some year groups and forms do not have tutors assigned. Make a note that this will need entering when you do have the information. [Click here](#) to see how.

2. Assign tutors to year groups and registration forms **8 out of 8 year group tutors assigned, 14 out of 15 registration form tutors assigned** ▶

Promote year group students

The next step is to Promote Year group Students by clicking this next field.

1. Copy year groups and registration forms	13 out of 13 year groups copied, 25 out of 25 registration forms copied	
2. Assign tutors to year groups and registration forms	13 out of 13 year group tutors assigned, 25 out of 25 registration form tutors assigned	
3. Promote Year Group Students	0 out of 13 promoted	▶
4. Enrol Applicants	There are no applicants for the new school year	▶
5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	0 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Choose which year groups to promote students into. For example, below you can see all Year 5 students will be moved into Year 6. You can also see that your highest year group is not automatically promoted. You can leave that field blank, then click **Promote**.

Promote Year Group Students

Here you can promote the students from the 2019/2020 year groups to 2020/2021 year groups. We have made some suggestions, but you can change these as you want below. Don't worry if you at this point are not sure which new year groups students should go in - you will get a chance to review and move students around at a later step.

Year 5 (2019/2020)	Year 6 (2020/2021)	⊗ ▼
Year 6 (2019/2020)	Promote to...	▼

Enrol Applicants

In this step, you'll be able enrol your next school years Applicants into Registration Forms and year groups, as you've now set them up.

If you haven't yet added your applicants to Arbor and finished processing them, you won't be able to enrol them yet. When you click the **4. Enrol Applicants** option, you'll see the below message.

You can use one of our 3 easy methods (shown in [this article](#)) to add these students to your site, then make and accept offers for the applicants who you expect to start in September - take a look at [this article](#) for the process.

Enrol Applicants

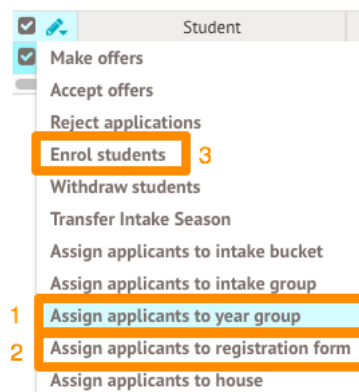
You have 1 unprocessed application for which the applicants cannot yet be enrolled. To manage your applications please click 'Manage Applications' below. Note! Enrol applicants setup as part of School Year Setup will remain with a red 'Incomplete' status, until all unprocessed applications have been dealt with.

Cancel

Manage Applications »

Once you've completed steps 2-6 in the article linked above, you'll be able to enrol your Applicants to be in the correct year groups and registration forms.

On the applicants list page in **All Students > Applicants**, tick students who have accepted their offers. Click the blue pencil icon to first select which year group they will be in, then select which registration form they will be in, then finally click **Enrol students**.



Add Applications to Registration Form

Academic year 2020/2021

Registration Form*

Student	Year Group	Registration Form	House
Devon Alice			

Add Applications to Year Group

Academic year 2020/2021

Year Group

Student	Year Group	Registration Form	House
Devon Alice			

Enrol Accepted Applicants

This will enrol the below students into academic year 2020/2021, their year group and, if defined, registration forms and houses. Please note that only students for which a year group has been set will be enrolled.

Intake season Academic year 2020/2021

Students

Student	Year Group	Registration Form	House
Devon Alice	Reception (2020/202...	Form REKE (2020/20...	

The students will then be enrolled in the Applicants section.

Academic year 2020/2021 Applicants			
Showing 5 results			
<input type="checkbox"/>	Student	Date	Status
<input type="checkbox"/>	Chauhan Parveen	21 Apr 2020	Enrolled
<input type="checkbox"/>	Devon Alice	31 Mar 2020	Enrolled

In the New School Year Setup the **4. Enrol Applicants** section should also now be marked as complete.

Setup 2020/2021	
1. Copy year groups and registration forms	15 out of 15 year groups copied, 27 out of 27 registration forms copied
2. Assign tutors to year groups and registration forms	14 out of 15 year group tutors assigned, 24 out of 27 registration form tutors assigned
3. Promote Year Group Students	14 out of 15 promoted
4. Enrol Applicants	Complete

If there are any remaining applicants who have accepted a place but you haven't yet enrolled, clicking the **4. Enrol Applicants** option will let you enrol these applicants. Any applicants without a tick beside their name will not be enrolled.

However, please note that this will not automatically enrol them into a Year Group and Registration form. If you haven't done this for these students, you should first follow the instructions shown above.

Year Groups & Registration Forms	
Setup 2020/2021	
1. Copy year groups and registration forms	15 out of 15 year groups copied, 27 out of 27 forms copied
2. Assign tutors to year groups and registration forms	14 out of 15 year group tutors assigned, 24 out of 27 registration form tutors assigned
3. Promote Year Group Students	14 out of 15 promoted
4. Enrol Applicants	Complete
5. Review and tweak Year Group enrolments	Optional
6. Promote Registration Form Students	0 out of 27 promoted
7. Review and tweak registration form enrolments	Optional

Enrol Applicants

Here you can enrol any applicants that have had their application accepted, and not withdrawn it, but who are yet to be enrolled. Each applicant will be enrolled in the academic level and registration form that have been set in the Applications section (shown in parenthesis). If no academic level or registration form has been set they will simply be enrolled in the academic year and you will be able to set the year group and academic level later in the process.

Applicants Parveen Chauhan (year group TBC, registration form TBC)

Cancel

Enrol Applicants

Review and tweak year group enrolments

The next step is to make any changes to the year group a student has been automatically promoted to if necessary. It is an optional step.

If your school is expanding you can add new year groups and registration forms within the 'Review' box by clicking on the green add button in the right-hand corner of the Year Groups box and the Registration Forms box. You can also make any changes to tutors and forms within the review area as well.

5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	0 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Click a student's name to edit the enrolment.

« Back
Review Year Groups

Review Year Groups - 2020/2021

Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.

Student	Year Group
Adams Amelia	Year 1 (2020/2021)
Adams Callum	Nursery 1 (2020/2021)
Adams Chris	Nursery 2 (2020/2021)
Adams Dennis	Reception (2020/2021)
Adams Duncan	Year 1 (2020/2021)

Remember: You can only edit a student's future enrolment from this page. If you need to change their current enrolment, use the *Enrolment* section on the *Student Profile*.

Click the Back button to return to the *Year Groups & Registration Forms* page.

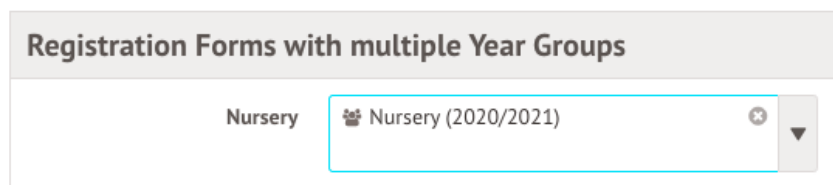
Promote registration form students

Next you can promote Registration Form students from this year's registration forms into their forms for next year. Don't worry if you at this point are not sure which students belong in which new registration forms - you will get a chance to review and move students around later.

6. Promote Registration Form Students 0 out of 25 promoted	▶
7. Review and tweak registration form enrolments Optional	▶

A slide-over will appear listing all current registration forms alongside the systems suggestions for the year group they will be promoted to. Each current class will have a drop-down menu for you to select which class they will become the following academic year.

If you have registration forms with multiple year groups, you will be able to select what to do.



Registration Forms with multiple Year Groups	
Nursery	Nursery (2020/2021) ▼

You may have a different number of classes for a year group the next year, for example, your current year 1 only has 2 classes but you'll be having 3 next year. The system will alert you to this. Once happy with your settings, click **Promote**.

Promote Registration Form Students

Here you can enrol students from 2019/2020 registration forms into 2020/2021 registration forms. Don't worry if you at this point are not sure which students belong in which new registration forms - you will get a chance to review and move students around at a later step.

Reception (2019/2020) to Year 1 (2020/2021)

Form REKE (2019/2020)

Form REYH (2019/2020)

Year 1 (2019/2020) to Year 2 (2020/2021)

Note!
It appears there are more registration forms in Year 2 (2020/2021) than there were in Year 1 (2019/2020). This, of course, makes it hard to promote the students into the exact right forms. But don't worry! Just enrol the students into any registration form - you will be able to move them around in a later review step.

Form 1FS (2019/2020)

Form 1PS (2019/2020)

Year 2 (2019/2020) to Year 3 (2020/2021)

Review and tweak registration form enrolments

The last step is to make any changes to the registration forms a student has been automatically promoted to if necessary. It is an optional step.

6. Promote Registration Form Students	23 out of 25 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

Click on the cell and a page will load for the first year group in your school. Select the year group you wish to make changes to by clicking on the top right-hand corner and selecting the year group from the drop-down cell.

Click on the cell containing the class information. A drop-down will appear offering the choices of classes for their year group. Select the class you wish to move them to and this will update.

« Back

Review Registration Forms

Year Group Year 3 (2020/2021) ▼

Review Registration Forms - Year 3 (2020/2021)

Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.

Student ▲	Registration Form
Adams Isabella	Form 3FS (2020/2021)
Bailey Anna	Form 3FS (2020/2021)
Bailey Eleanor	Form 3PS (2020/2021)

Resolving students without an enrolment

If you have any students who were not assigned a year group this academic year, they will not have been promoted to the next year group during **Step 2**. Instead, these students will appear in the **Review** section.

Review

Students without an Enrolment for 2020/2021 ▲

Showing 56 results Download ▼

Student ▲	Current Year Group	Current Registration Form
Adams Philip		
Allen Zachary		

Enrolling attending students

If they will be attending your school next year, you will need to add them to a year group and registration form. Click the student's name to visit their profile and assign them to a year group and registration form.

First, change the academic year to next year.

Academic Year	2019/2020	▼
View	2018/2019	
	2019/2020	
	2020/2021	

In the **2020/2021 Enrolments** section, click **+Add** to add their enrolment into the required year group etc.


Enrol Student in Academic Year

Academic year	2020/2021
Student	Philip Adams
Enrolment mode*	Single Registration ⊕ ▼
Attendance pattern	Only required for early years ▼
Year group	Leave blank to choose year group later ▼
Registration form	Leave blank to choose registration form later ▼
House	Leave blank to choose house later ▼
Notes	<input type="text"/>
Planned Learning Hours	<input type="text"/>
Planned EEP Hours [Ⓞ]	<input type="text"/>

Removing students who will not be attending

To off-roll these leavers if they will not be attending your school next academic year, you will need to delete or end their enrolment. Click the student's name to visit their profile.

Click their enrolment in your school.

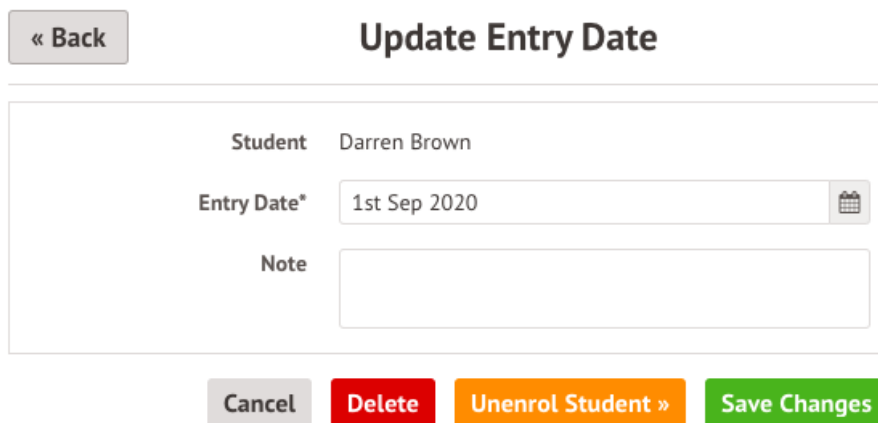


Aiden's Sunnyville Enrolment + Add

Future Enrolment 01 Sep 2020 - ongoing ▶


In the slide over, click the orange **Edit** button. You can then Unenrol the student if they no longer attend by clicking **Unenrol Student**.

If the student never attended your school, you can delete their enrolment completely by clicking **Delete**.



« Back **Update Entry Date**

Student Darren Brown

Entry Date* 

Note

Cancel **Delete** **Unenrol Student »** **Save Changes**

Whichever method you choose to resolve your missed enrolments, the student should no longer appear in the **Review** section of your **New School Year Setup Step 3** page. You should aim to remove all the students listed in this section.

Make sure your students will be in the right year

To check that all your students have the correct year group for next year, go to **Students > Enrolment**. You will be taken to the **Year Groups** page. Change the academic year using the drop-down menu.

If you have not yet properly completed the setup for the next academic year, you will not see any year groups here. Complete the section above to promote your students into their year groups for next year.

Year Groups: 2020/2021

Academic Year: ▼

Listing **Enrolments**

Year Groups for 2020/2021 [+ Add](#)

No Year Groups for 2020/2021

If you completed this step, you can check your enrolments are correct. You can click into the **Enrolments** tab to directly edit student enrolments.

Review Year Groups - 2020/2021	
Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.	
Student ▲	Year Group
Adams Amelia	Reception (2020/2021)
Adams Callum	Year 5 (2020/2021)

Step 4 - Custom Groups

You won't have any custom groups on your site, so you can choose *Mark as Completed*

Step 5 - Houses

The next step is to set up your Houses for the next academic year. This step is optional, so if you do not use Houses, just click on the green '**Mark as Complete**' button.

4. Custom Groups		Complete
5. Houses		Available
6. Courses & Classes	5. Houses	Available
7. Meals	Houses setup is available and needs to be marked as complete	Available
8. Interventions		Available
Review School Year Setup		

You can copy your Houses over from the current academic year.

1. Copy houses and house enrolments	0 out of 4 houses copied	▶
-------------------------------------	--------------------------	---

In the slide over, you can select which houses you would like to copy over. Then click the **Copy** button. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year as part of copying the houses. Current house tutors will also be set as tutors of the new house by default.

Copy Houses and House Enrolments

Below is a list of all houses in the current academic year. Tick the ones you would like to copy to the next academic year and untick the ones that should not be copied. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year as part of copying the houses. Current house tutors will also be set as tutors of the new house.

Houses (2018/2019)

- Acklam Copy House and Members
- Colville Copy House and Members
- Ladbroke Copy House and Members
- Westbourne Copy House and Members

Cancel

Copy

You can also set up entirely new houses as needed by clicking **+Add**.

Review

Houses (2020/2021)

[+ Add](#)

Create House - 2020/2021

Academic Year 2020/2021

House Name*

Short Name

Cancel

Save Changes

When you have created your houses, click a house to go to the **House Overview** to assign Heads of House or delete it.

Acklam	Tutors: None assigned	152 students ▶
Colville	Tutors: None assigned	148 students ▶
Ladbroke	Tutors: None assigned	148 students ▶
Westbourne	Tutors: None assigned	150 students ▶

« Back
Acklam (2020/2021)

House Overview - Acklam (2020/2021)


Name	Acklam	▶
Short name	Acklam	▶
Academic year	2020/2021	▶
Students	152	

Head of House

No results found

[+ Add](#)
Head of House

Attachments


Drag or click to upload

[📷 Capture with webcam](#)

Delete House

[Browse Student Profiles](#)

Step 6 - Courses & Classes

The next step is to manage Courses and Classes for the next academic year.

School Year Setup

2019/2020	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups & Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Courses & Classes	Available
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

6. Courses & Classes

Courses & Classes setup is available and needs to be marked as complete

You must complete this step to schedule registration periods. If you do not, you will not have any registers in September. Select **Step 6. Courses & Classes**. If you haven't yet scheduled your registration periods, this section will be blank.

For primary schools, we recommend selecting option **A. Schedule Sessions from Registration Forms**.

Courses & Classes

Setup 2020/2021

Please ensure you choose only one setup option for each class. Completing more than one option risks you duplicating courses or lessons.

A. Schedule Sessions from Registration Forms	Optional	▶
B. Import Courses & Classes from TimeTabler	Optional	▶
C. Set up new Courses & Classes from scratch	Optional	▶

Review Courses & Classes (2020/2021) + Add

No Courses & Classes exist for 2020/2021

This will bring you to a list of all the registration forms you have. Tick the box next to the blue pencil icon to select all the registration forms, then click the blue pencil icon to select **Schedule Registration Forms**.

Setup Registration Forms

Academic Year 2020/2021 ▼

Registration Forms in 2020/2021

<input type="checkbox"/> Registration Form	Year Group(s)	Status
<input checked="" type="checkbox"/> Schedule Registration Forms	Reception (2020/2021)	Not Timetabled
<input checked="" type="checkbox"/> Form REYH (2020/2021)	Reception (2020/2021)	Not Timetabled
<input checked="" type="checkbox"/> Form 1FS (2020/2021)	Year 1 (2020/2021)	Not Timetabled
<input checked="" type="checkbox"/> Form 1PS (2020/2021)	Year 1 (2020/2021)	Not Timetabled

A slide-over will appear where you enter the start and end times for the Registration Forms you have selected.

Schedule registration forms for the whole morning in order to prevent errors during Census, making sure your Morning end time falls at the beginning of lunchtime and your Afternoon end time is the end of the school day.

[« Back](#)

Schedule Registration Forms

Morning start time	<input type="text" value="08:30"/>	
Morning end time	<input type="text" value="12:00"/>	
Afternoon start time	<input type="text" value="13:00"/>	
Afternoon end time	<input type="text" value="15:30"/>	

Please note, if you have a Reception you will need also need to choose if you will be using [regular attendance patterns](#) for your Reception students or not.

« Back **Schedule Registration Forms**

Morning start time 08:30

Morning end time 12:00

Afternoon start time 13:00

Afternoon end time 15:30

Some Registration form(s) selected are Reception classes. Please choose below if you would like to set up separate course modules per day for these classes.

Create separate modules per day for reception classes? No, we will not be using attendance patterns

Reg

FS1 (
FS2 (
N1 (2	
1LM (2019/2020)	

Cancel **Schedule Registration Forms**

Separate modules per day are needed if Attendance Patterns will be added to indicate that some students will attend some sessions and not others.

If Reception students attend all sessions, or you plan to manage part-time/phased attendance students using the "X" attendance code, you will not need course modules for each day.

If you select 'no', all the lessons for the whole week will be scheduled directly against the top level course/module for the reception class, without creating all the AM/PM modules.

Students will be automatically enrolled in sessions based on their enrollments into Registration Form groups.

We recommend this option, as it is easier to make adjustments if necessary.



The setup will look something like this:

Classes & Lessons		+ Add
Monday: 09:00 - 10:00 Effective Dates: 01 Sep 2018 - 31 Aug 2019		Scheduled ▶
Tuesday: 09:00 - 10:00 Effective Dates: 01 Sep 2018 - 31 Aug 2019		Scheduled ▶
Wednesday: 09:00 - 10:00 Effective Dates: 01 Sep 2018 - 31 Aug 2019		Scheduled ▶
Thursday: 09:00 - 10:00 Effective Dates: 01 Sep 2018 - 31 Aug 2019		Scheduled ▶
Friday: 09:00 - 10:00 Effective Dates: 01 Sep 2018 - 31 Aug 2019		Scheduled ▶

If you select 'yes', separate modules for each AM and PM session, for every day of the week, will be created and the lessons will be scheduled against those modules automatically. Each session will become a module with one class time within it.

You will need to make sure that you have set [attendance patterns](#) for your reception students for them to be automatically enrolled in these classes, and for them to appear on the register.

The setup will look something like this:

Modules			+ Add
Name	Students	Info	
Fri AM	2	01 Sep 2018 - 31 Aug 2019	
Fri PM	2	01 Sep 2018 - 31 Aug 2019	
Mon AM	2	01 Sep 2018 - 31 Aug 2019	
Mon PM	2	01 Sep 2018 - 31 Aug 2019	
Thurs AM	3	01 Sep 2018 - 31 Aug 2019	
Thurs PM	2	01 Sep 2018 - 31 Aug 2019	
Tues AM	2	01 Sep 2018 - 31 Aug 2019	
Tues PM	2	01 Sep 2018 - 31 Aug 2019	

Once the sessions have been timetabled, you can see these on the **Setup Registration Forms** page.

Setup Registration Forms

Academic Year 2018/2019 ▼

Registration Forms in 2018/2019			
<input type="checkbox"/>	Registration Form	Year Group(s)	Status
<input type="checkbox"/>	N2 (2018/2019)	Nursery Yr2 (2018/2019)	Not Timetabled
<input type="checkbox"/>	Reception (2018/2019)	Reception (2018/2019)	Already Timetabled
<input type="checkbox"/>	Form 1TW (2018/2019)	Year 1 (2018/2019)	Already Timetabled
<input type="checkbox"/>	Form 1XG (2018/2019)	Year 1 (2018/2019)	Already Timetabled

When you return to the **Courses & Classes** page you will now see a list of all the scheduled Registration Forms. You can then mark this step as complete.

Courses & Classes

Setup 2019/2020

Please ensure you choose only one setup option for each class. Completing more than one option risks you duplicating courses or lessons.

A. Schedule Sessions from Registration Forms	Optional	▶
B. Import Courses & Classes from TimeTabler	Optional	▶
C. Set up new Courses & Classes from scratch	Optional	▶

Review Courses & Classes (2019/2020) + Add

+ Reception	▶
- Year 1	▶
Form 1CV	▶
Form 1TY	▶
- Year 2	▶
Form 2LN	▶
Form 2TM	▶

Instructions

Courses & Classes setup steps are optional. Once you have reviewed Courses & Classes, click Mark as complete to complete setup or click Skip for now to review later.

✔ Mark as complete

↶ Skip for now

Adding additional classes

If you have more classes than just the registration groups each day, you can set up additional classes. Make sure you have these pieces of information ready:

- What you will call the class and the subject name
- What room the class will be in
- Which teachers will be assigned to the class
- When the classes take place

Choose option **C. Setup Courses & Classes from scratch**. A slide-over will appear where you need to enter information about the course/class you are setting up.

You can only select one year group per course you create. Leave the **Year group** field blank to be able to create sub-modules assigned to different year groups. When all the details are correct, click on the green **'Add Course'** button.

Add New Course to 2018/2019

Course name*	<input type="text" value="History"/>
Department	<input type="text" value="History"/> × ▼
Academic lead	<input type="text" value="Tara Watson"/> × ▼
Subject	<input type="text" value="History"/> × ▼
Year group	<input type="text"/>

This creates the course (the top-level component). The next step is to set up modules within the course. From the **Course Overview**, click **+Add** in the **Modules** section.

History

Academic Lead **Tara Watson** | Enrolment **0 Students**

Admin

Course name	History
Academic year	2018/2019
Component of	Nothing - top level component
Year group	Not set
Subject	History
Linked Departments	History
Programmes	Not set
Students	0
Take attendance?	Lesson Attendance (UK DFE)

Academic Lead + Add

Watson Tara 01 Sep 2018 - 31 Aug 2019 ▶

Attachments

Drag or click to upload

Capture with webcam

Download Student List

Communications ▼

Delete Course

In the slide over add the name of the module e.g. History for year 8 and fill in the other details. This time select the year group. Then click the green 'Add Module' button.

Add New Module

Module name*	<input type="text" value="History Y8"/>
Department	<input type="text" value="History"/> + ▼
Academic Lead	<input type="text" value=""/> ▼
Subject	<input type="text" value="History"/> + ▼
Year group	<input type="text" value="8"/> + ▼

Year 8 (2018/2019)

Cancel
Add Module

You will be taken to the module overview. To schedule lessons for this class, click +Add in the **Classes & Lessons** section. You can then choose to schedule multiple regular lessons.

What would you like to do?

Add Item in: **Classes & Lessons**

Schedule single lesson ▶

Schedule multiple lessons ▶

In the sideover, select the days the lessons will run on, the time, effective dates, location, and the teacher. This ensures this person sees this lesson in their calendar.

Schedule multiple lessons

Day of week (term time only) Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Lesson start time* 09:00 ⌚

Lesson end time* 10:00 ⌚

Effective date* 1st Sep 2018 📅

End date* 31st Aug 2019 📅

Location Site 1: 210 ⌵

Staff member Usually leave this blank to use Academic Leads ⌵

Cancel Save Changes

You must repeat this process for each module you need setting up.

Make sure you have registers for your first day back

If you don't have registers set up, your teachers won't be able to take attendance on your first day back! To check they've been set up, first take a look at when your registers should start. Go to **School > School Structure > Academic Years**, then select the upcoming academic year.

Academic Years

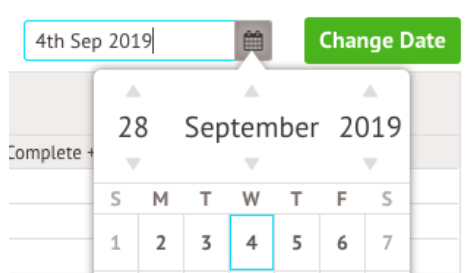
Academic Years		+ Add
2019/2020	01 Sep 2019 - 31 Aug 2020	▶
2018/2019	01 Sep 2018 - 31 Aug 2019	▶
2017/2018	01 Sep 2017 - 31 Aug 2018	▶
2016/2017	01 Sep 2016 - 31 Aug 2017	▶

In the example below, the first day of the term is the 1st. However, as I have put the 2nd and 3rd as inset days, the first day I need to take attendance is the 4th of September.

Academic Calendar

Academic Year 2019/2020		
Academic year name	2019/2020	
Dates	01 Sep 2019 - 31 Aug 2020	
Terms (2019/2020)		
Autumn	01 Sep 2019 - 05 Jan 2020	
Spring	06 Jan 2020 - 19 Apr 2020	
Summer	20 Apr 2020 - 31 Aug 2020	
Holidays (2019/2020)		
Summer Holiday 2019	01 Sep 2019	Vacation
INSET 1	02 Sep 2019	Inset
INSET 2	03 Sep 2019	Inset
Autumn Half Term	21 Oct 2019 - 25 Oct 2019	Half-Term

Next, go to **Students > Attendance > Historic Registers**. Click the calendar icon, and select the first day your registers should exist for, then click **Change Date**.



If you've set up your courses, classes and registration forms correctly, they should appear on this page!

Historic Registers

Wed, 04 Sep 2019					
Period	Lesson/Event	Staff	Opened	Complete + Valid	Marks
08:50 - 09:00	Registration: Lower Sixth: Form 12AB ...	Ananya Wason			
08:50 - 09:00	Registration: Upper Sixth: Form 13BC ...	Carrie Clarke			
08:50 - 09:00	Registration: Year 7: Form 7JB (2019/...	Jonathan Bailey			
08:50 - 09:00	Registration: Year 7: Form 7OC (2019/...	Oscar Cox			

If they don't, and you're sure you haven't scheduled a holiday on this day, this means you haven't scheduled your timetable to start on the right date or you haven't enrolled students in your Courses and Classes.

There are multiple ways to do this:

- If you know a certain cohort of students who will take all the same courses, you can automatically enrol them using Teaching Groups. [Click here](#) to see how.
- To add automatic enrolments from a particular course, so anyone enrolled into the original course will automatically be enrolled into the other course, [click here](#).
- If you'd like to bulk enrol students using an imported spreadsheet, [click here](#).
- To enrol your students manually into your courses and classes, you should go to **School > Programmes > Next Year Courses** and go to the **Table View** tab.

Courses & Classes: 2019/2020

[Course Bulk Enrolment](#)

 Academic Year 2019/2020
[Tree View](#) [Table View](#)

Showing 186 results

<input type="checkbox"/>	Course	Year Group	Subject	Academic Lead	Students
<input type="checkbox"/>	Year 9	Year 9			0
<input type="checkbox"/>	Year 8	Year 8			0
<input checked="" type="checkbox"/>	Technology: Year 8: 8AB(z) Tech 3 'P'	Year 8	Design and Technology	Charlotte Mitchell	0
<input type="checkbox"/>	Technology: Year 8: 8AB(z) Tech 2 'P'	Year 8	Design and Technology	Charlotte Mitchell	0
<input type="checkbox"/>	Technology: Year 8: 8AB(z) Tech 1 'P'	Year 8	Design and Technology	Vicky Matthews	0
<input type="checkbox"/>	Technology: Year 8	Year 8	Design and Technology		0

You can click on the course, then click the **Enrol Students** button.

[« Back](#)

Technology: Year 8: 8AB(z) Tech 3 'P' (2019/2020)

Details	
Component of	Technology ▶
Component of	Year 8 ▶
Subject	Design and Technology
Year Group	Year 8 (2019/2020) ▶
Academic Lead	Charlotte Mitchell

Schedule	
Wednesday 13:00 - 14:00 Effective Dates: 01 Sep 2019 - 30 Aug 2020 Staff: Chris Chapman	Site 1: L26
Wednesday 14:00 - 15:00 Effective Dates: 01 Sep 2019 - 30 Aug 2020 Staff: Chris Chapman	Site 1: L26

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

You can then select the students to enrol.

[« Back](#)





Enrol Students

Information

Please note that it may take a moment for the enrolments to complete, so please be patient.

Student(s) will be automatically enrolled into the parent course Technology: Year 8 (2019/2020).

Students* ⓘ

 Kieran Anderson (8PG) ✕
 Amelia Bailey (8PG) ✕
 Karl Bailey (8AT) ✕
 Theresa Bailey (8PG) ✕

Enrol in more Technology (2019/2020) modules?

- Technology: Year 7 (2019/2020)
- Technology: Year 7: 7A Tech (2019/2020)
- Technology: Year 7: 7B Tech (2019/2020)
- Technology: Year 8 (2019/2020)
- Technology: Year 8: 8AB(z) Tech 1 'P' (2019/2020)
- Technology: Year 8: 8AB(z) Tech 2 'P' (2019/2020)

Start date ⓘ 1st Sep 2019 

End date ⓘ 31st Aug 2020 

[Cancel](#)[Enrol Students](#)



Step 7 - Meals

This step is about copying over meals from the previous academic year. You won't have this information stored in Arbor so please mark this as completed. We can provide you with different guidance on how to create your Meals in Arbor.

Step 8 - Interventions

No Intervention will have been set up in Arbor, so please mark this ask completed.

Review School Year Setup

Once you have marked the final section as complete, you will be taken back to the Setup overview, where you can see all stages should be marked as **Complete**.

School Year Setup

2019/2020	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups & Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Courses & Classes	Complete
7. Meals	Complete
8. Interventions	Complete
Review School Year Setup	

The last step of the workflow is to review your setup for the next academic year. To see everything you have entered in the setup process, click the last step on the **Overview** page.

You can click on any of the cells with an arrow beside them to review the information. You can also review your Year Groups and Registration Forms.

Review School Year Setup

2019/2020 New School Year Setup Review	
Review enrolments for next academic year	▶
Review attendance patterns for next academic year	▶
Setup timetable for the next academic year	▶
2019/2020 Year Groups and Registration Forms ➕ Add	
Reception (2019/2020)	2 students, promoted from Nursery Head of Year: Muhammad Cox Registration Forms Form REFJ (2019/2020): 0 students Tutor : Rob Stevens Form REFY (2019/2020): 2 students, promoted from N1 Tutor : Muhammad Cox

Adding important information to Arbor

You will now have an Arbor site with basic enrollment for your previous academic year, basic student, staff and guardian information and your next academic year setup so you can start taking attendance in Arbor from September.

To be ready for day one on Arbor we then recommend adding important information into Arbor so that you can access it on day one if needed, the below instruction will show you how to add the following:

- Additional Student Information
- Additional Staff Information
- Guardian Contact Information
- Data Quality Dashboard

Before you start adding this information we strongly advise you to watch some of our Arbor Essentials webinar. It is recommended that you watch [Essentials 1](#).

Additional Student Information

Basic information will have been imported via the student CTF, it is important that your review and additional information such as Medical and Dietary Conditions. The content in the Essential 1 will have given you an overview of the Student Profile. We have some other guidance that will help you with adding additional information to the Student Profile.

- [Student Profile: Overview](#)
- [Student Profile: Videos](#)

This guide will cover how to add Medical, Dietary, SEN Status and SEN Needs to the profile. The help centre may contain guidance on how to add other information if you want to.

Medical Information

Adding new medical information

1. Go to the *Student* profile
2. Scroll to the *Medical* section
3. Click on the **Add** button
4. Select the *Medical Information* you want to add
5. Fill out the form in the slide over, you will get the option to also add as a *Dietary Requirement* if relevant.
6. Finally click **Save Changes**

Please note if you are unable to find the correct medical condition please email the Support Team and we can advise on a suitable solution.

Editing existing information

1. Go to the *Student* profile
2. Scroll to the *Medical* section
3. Click on the record you want to edit
4. In the slide over select the **Edit** button
5. Edit the information and click **Save Changes**

Dietary Information

Adding new dietary information

1. Go to the *Student* profile
2. Scroll to the *Dietary* section
3. Click on the **Add** button
4. Select **Dietary Requirement**



5. Fill out the form in the slide over and click **Save Changes**

Editing existing information

1. Go to the *Student* profile
2. Scroll to the *Dietary Requirement* section
3. Click on the record you want to edit
4. In the slide over select the **Edit** button
5. Edit the information and click **Save Changes**

SEN Status

Adding a new SEN Status

1. Go to the Student profile
2. Click on **Educational Needs** on the left
3. Please review any existing SEN Statuses
4. Click on the **Set new SEN status** button
5. Fill out the information in the slide over and click **Save Changes**

Editing an existing SEN Status

1. Go to the Student profile
2. Click on **Educational Needs** on the left
3. Click on the SEN Status you want to edit
4. Click on the **Edit** button
5. Edit the relevant information and click **Save Changes**

SEN Needs



Adding a new SEN Need

- 1) Go to the Student profile
- 2) Click on ***Educational Needs*** on the left
- 3) Click on the ***Add*** button next to the ***Educational Needs*** heading
- 4) Select ***Special Educational Need***
- 5) Fill out the relevant information in the slide over on the left and click ***Add SEN Need***

Adding a new SEN Need

1. Go to the Student profile
2. Click on ***Educational Needs*** on the left
3. Click on the ***SEN Need*** you want to edit under the ***Educational Needs*** heading
4. Click on the Edit button
5. Edit the relevant information in the slide over on the left and click ***Save Changes***

Additional Staff Information

To be ready for day one on Arbor you will want to make sure you have key information regarding your staff. Our team will have only imported very basic information for your staff profiles! The content in the Essential 1 will have given you an overview of the Staff profile. We have some other guidance that will help you with adding additional information to the Staff profile.

- [Staff Profiles: Guide](#)
- [Adding, amending and deleting information from Staff Profiles](#)
- [Staff Data, HR and Contracts](#)

This guide will cover how to add Medical Information, and Next of Kin details to your staff profiles.

Staff Medical Information

Adding new medical information



Adding new medical information

1. Go to the *Staff* profile
2. Scroll to the *Medical* section
3. Click on the **Add** button
4. Select the *Medical Information* you want to add
5. Fill out the form in the slide over, you will get the option to also add as a *Dietary Requirement* if relevant.
6. Finally click **Save Changes**

Please note if you are unable to find the correct medical condition please email the Support Team and we can advise on a suitable solution.

Editing existing information

1. Go to the *Staff* profile
2. Scroll to the *Medical* section
3. Click on the record you want to edit
4. In the slide over select the **Edit** button
5. Edit the information and click **Save Changes**

Staff - Next of Kin

Adding a new Next of Kin

1. Go to the *Staff* profile
2. Scroll to the *Next of Kin* section and click on the **Add** button
3. Fill out the relevant information and click **Add next of kin**

Editing existing Next of Kin information

1. Go to the *Staff* profile
2. Scroll to the *Next of Kin* section and click on the details you want to edit
3. Click on **More information**

4. Click on the details you want to edit and in the slide over click on the **Edit** button
5. Change the details need and click **Save Changes**

Guardian Contact Information

Your Project Coordinator will have uploaded a report template into your site to help you with checking this data please go to **School > Custom Report Writer > Specialised Migration - Guardian Contact Information**. This report will include your Primary Guardian on Arbor that are linked to students in the current academic year.

The content in the Essential 1 will have given you an overview of the Guardian profile. We have some other guidance that will help you with adding additional information to the guardian profile.

[Student and Guardian Profile: Guide](#)

In this guide we will cover how to add/edit contact information and Student Guardian Relationships

Guardian Contact Information

Adding new contact information

1. Go to the *Guardian* profile
2. Scroll to the *Contact Details* section and click on the **Add** button
3. Select the information you wan to add
4. In the slide over fill out the relevant information and click **Save Changes**

Editing contact information

1. Go to the *Guardian* profile
2. Scroll to the *Contact Details* section and click on the information you want to edit
3. In the slide over click on the **Edit** button



4. Fill out the relevant information and click ***Save Changes***

Student Guardian Relationship Information

Updating Primary/Legal Guardian Status

1. Go to the *Student* profile
2. Scroll to the Family, Guardian & Contacts section
3. Click on the guardian you want to edit
4. In the slide over click ***Edit***
5. Change the relevant information and click ***Save Changes***

Data Quality Dashboard

Arbor has an in-built data quality that can help you to identify possible errors in the data being stored in your MIS. The final step to achieving this milestone is reviewing your data so that you are ready for day one. [This guide](#) will explain more about using the dashboard.



Need any more help?

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